

# The Economic Impact of West Oxfordshire's Visitor Economy 2015

Produced on behalf of the West Oxfordshire District Council  
By  
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# Introduction

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This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in West Oxfordshire district in 2015. West Oxfordshire works very closely with other districts in Gloucestershire as part of the Cotswold brand so comparisons to Gloucestershire districts are also provided.

The figures were derived using the Cambridge Economic Impact Model undertaken by The South West Research Company (TSWRC). The model utilises information from national tourism surveys and regionally/locally based data. It distributes regional activity as measured in those surveys to local areas using 'drivers' such as the accommodation stock and occupancy which influence the distribution of tourism activity at local level.

For further information on the Cambridge Model and the terms used in this report please see Appendix 1 which accompanies this report.

For an overview of 2015, including key facts about the economy, weather and key events please see Appendix 2 of this report.



# Value of Tourism 2015

## West Oxfordshire

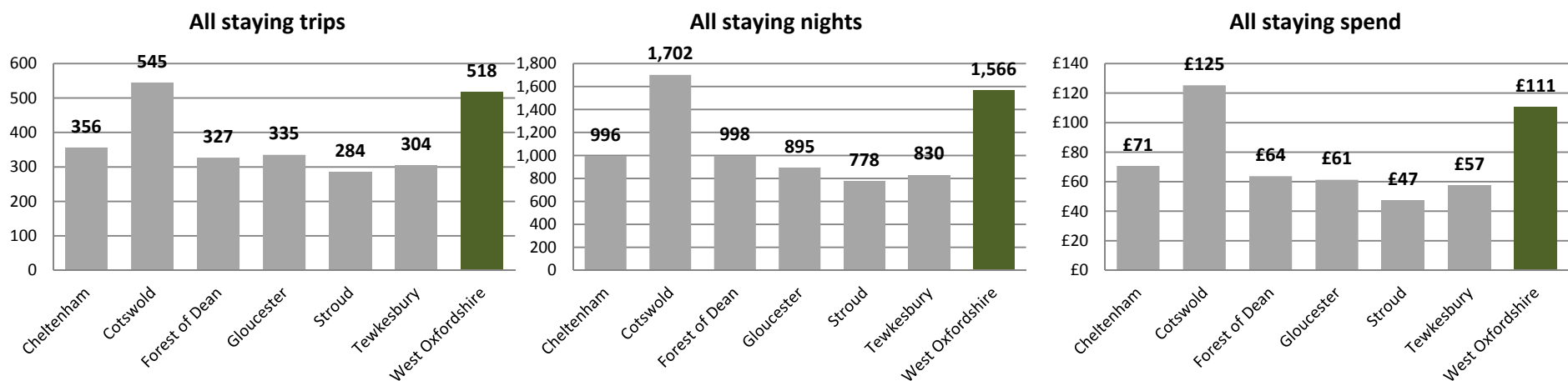
Key Facts	
518,400	Staying visitor trips
1,566,000	Staying visitor nights
£110,840,000	Staying visitor spend
3,724,000	Day visits
£123,609,000	Day visitor spend
£234,449,000	Direct visitor spend
£12,254,000	Other related spend
£246,703,000	TOTAL VISITOR RELATED SPEND
£282,122,000	TOTAL BUSINESS TURNOVER SUPPORTED
4,795	Estimated actual employment
3,469	FTE employment
10%	Proportion of all employment

## West Oxfordshire – Staying visits

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Information on staying visits is derived from the Great Britain Tourism Survey (GBTS) for domestic visitors and from the International Passenger Survey (IPS) for Overseas visitors. The methodology of both surveys has been stable since 2006 allowing for direct comparison between years and the analysis of trend data. Data at a county level is derived from the national surveys for trips, nights and spend but adjusted to account for local data and modelled below this level.

# West Oxfordshire - Staying visits comparisons



Area	Domestic trips (000's)	Overseas trips (000's)	Domestic nights (000's)	Overseas nights (000's)	Domestic spend (millions)	Overseas spend (millions)
Cheltenham	311	45	688	308	£51	£19
Cotswold	487	58	1,312	390	£97	£28
Forest of Dean	287	40	699	299	£44	£20
Gloucester	292	43	626	269	£44	£17
Stroud	250	35	568	210	£35	£13
Tewkesbury	267	37	611	219	£43	£15
West Oxfordshire	446	72	1,022	544	£76	£34

## West Oxfordshire - Staying visits by accommodation type

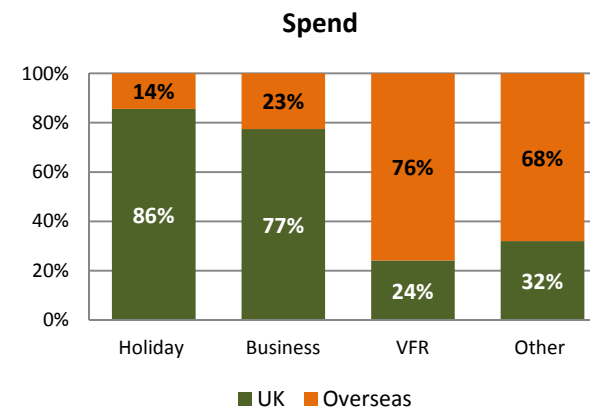
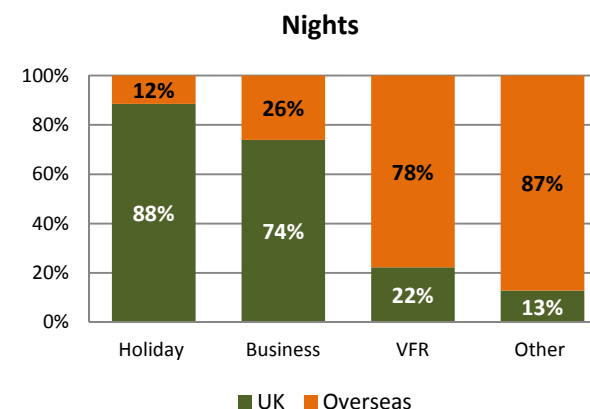
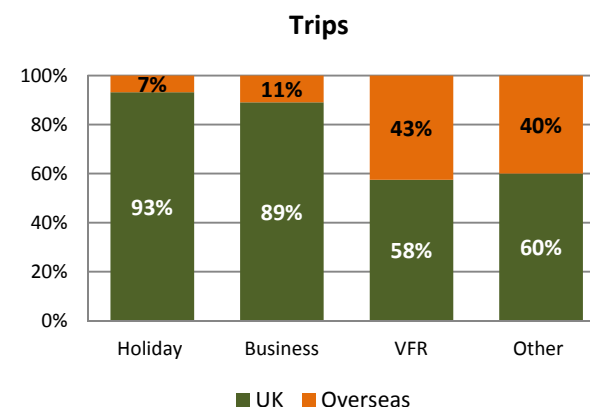
Domestic tourists	Trips	Nights	Spend
Serviced	283,900	518,000	£59,651,000
Self catering	15,700	39,000	£2,534,000
Touring caravans /tents	36,500	117,000	£4,156,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	10,100	91,000	£2,797,000
Boat moorings	0	0	£0
Other	1,600	6,000	£129,000
Staying with friends and relatives	98,500	250,000	£7,097,000
<b>Total</b>	<b>446,400</b>	<b>1,022,000</b>	<b>£76,363,000</b>

Overseas tourists	Trips	Nights	Spend
Serviced	23,500	81,000	£11,959,000
Self catering	12,100	88,000	£3,805,000
Touring caravans /tents	4,700	34,000	£1,488,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	1,200	31,000	£2,276,000
Boat moorings	0	0	£0
Other	400	3,000	£248,000
Staying with friends and relatives	30,000	306,000	£14,701,000
<b>Total</b>	<b>72,000</b>	<b>544,000</b>	<b>£34,477,000</b>

# West Oxfordshire - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	288,000	754,000	£46,347,000
Business	106,000	167,000	£23,163,000
Visits to friends and relatives	46,000	91,000	£5,276,000
Other	6,000	10,000	£1,577,000
Study	0	0	£0
<b>Total</b>	<b>446,000</b>	<b>1,022,000</b>	<b>£76,363,000</b>

Overseas tourists	Trips	Nights	Spend
Holiday	21,000	98,000	£7,807,000
Business	13,000	59,000	£6,742,000
Visits to friends and relatives	34,000	318,000	£16,576,000
Other	4,000	68,000	£3,352,000
Study	0	0	£0
<b>Total</b>	<b>72,000</b>	<b>544,000</b>	<b>£34,477,000</b>





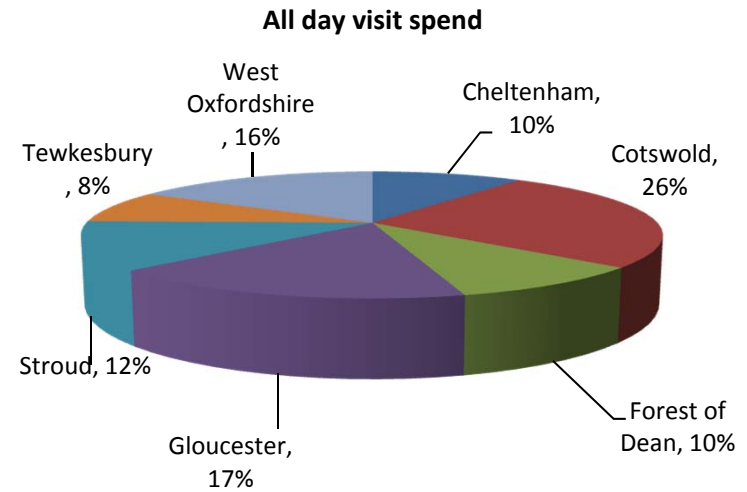
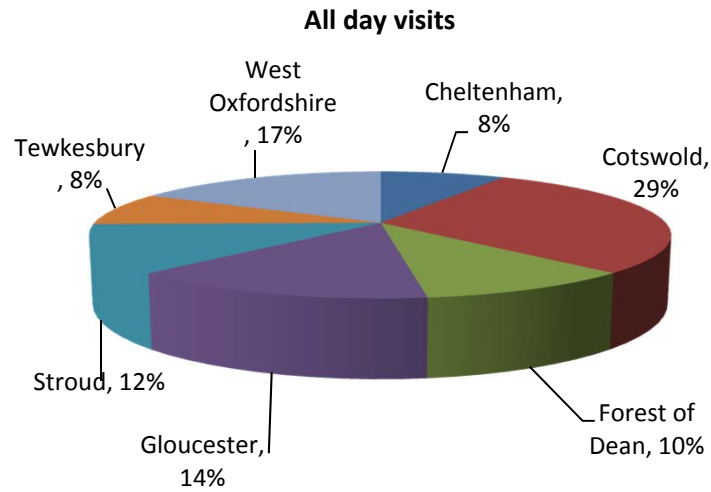
## West Oxfordshire – Day visits

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Information on day visits within this report has been derived from the 2015 Great Britain Day Visit Survey (GBDVS). The survey, which was first undertaken in 2011, provides a much needed update on day visit activity in Great Britain and generally speaking estimated greater frequencies of trip taking than the previous day visit survey (England Leisure Visits Survey 2005). As a result of the new methodology in 2011 comparisons with previous day visit estimates are not possible.

The GBDVS distinguishes between day visits to a town or city; to the seaside and coast; and to the countryside. Different drivers are used within the model to distribute these trips. Local 'drivers' such as attraction footfall, quality and size of countryside and coastline are factored into the model for this purpose.

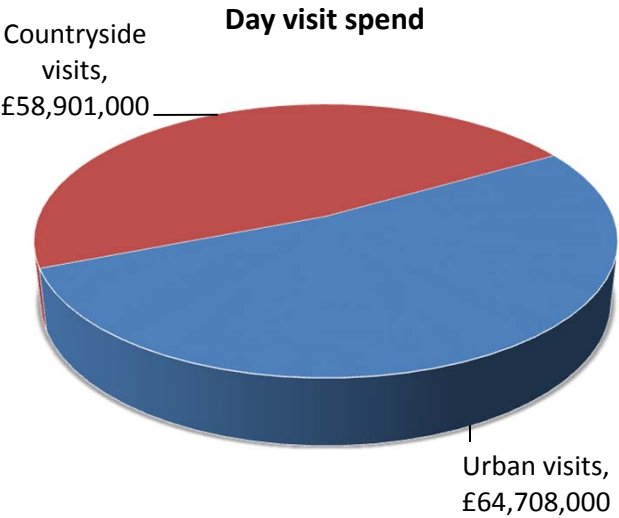
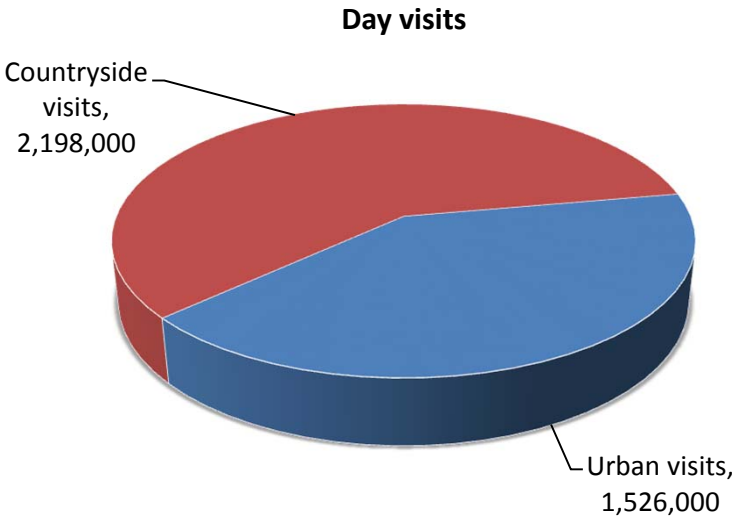
# West Oxfordshire - Day visits comparisons



Area	Day visits	Day visit spend
Cheltenham	1.8	£75.9
Cotswold	6.4	£196.4
Forest of Dean	2.3	£72.2
Gloucester	3.2	£130.6
Stroud	2.7	£92.7
Tewkesbury	1.8	£61.4
West Oxfordshire	3.7	£123.6

# West Oxfordshire - Day visits by location

Total day visits	Total day visit spend
3,724,000	£123,609,000



## West Oxfordshire - Direct visitor expenditure by category

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Information on the breakdown of visitor spending is available from the three main tourism and day visitor surveys by type of visitor. The Model divides the expenditure between five sectors:

- Accommodation
- Shopping for gifts, clothes and other goods
- Eating and drinking in restaurants, cafes and inns
- Entry to attractions, entertainment and hire of goods and services
- Transport and travel costs including public transport, purchase of fuel and parking

The following pages look at the breakdown of this expenditure and business turnover arising from this expenditure.

By applying the expenditure breakdown to the estimates of visitor spending the Model generates estimates of total spending by the five business sectors. Visitor expenditure in each sector represents additional turnover for businesses in those sectors. However, evidence from national studies suggests that some minor adjustments are required to match visitor spend to business turnover. In particular, some expenditure on food and drink actually takes place in inns and hotels that fall into the accommodation sector and at attractions. The turnover for each business sector has therefore been adjusted to take account of these marginal changes. More significantly, expenditure on travel costs associated with individual trips is as likely to take place at the origin of the trip as it is at the actual destination. It is therefore assumed that only 60% of total travel expenditure accrues to the destination area.

# West Oxfordshire – Direct visitor expenditure by category



## Accommodation

- UK staying visitors £28,837,000
- Overseas staying visitors £9,400,000



## Shopping

- UK staying visitors £8,640,000
- Overseas staying visitors £9,796,000
- Day visitors £39,654,000



## Food & drink

- UK staying visitors £17,371,000
- Overseas staying visitors £7,847,000
- Day visitors £51,404,000



## Attractions/entertainment

- UK staying visitors £7,125,000
- Overseas staying visitors £3,906,000
- Day visitors £16,828,000



## Travel

- UK staying visitors £14,390,000
- Overseas staying visitors £3,527,000
- Day visitors £15,723,000

## West Oxfordshire – Other visitor related expenditure by category

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Second Homes

£4,170,000



Visiting friends and relatives (non-visitor spend)

£8,084,000

- Spend on second homes estimates cover rates, maintenance, and replacement of furniture and fittings..
- Additional spending is incurred by friends and relatives as a result of people coming to stay with them.

## West Oxfordshire – Business turnover

Turnover derived from trip expenditure	Staying visitor related	Day visitor related	Total
Accommodation	£38,742,000	£1,028,000	£39,770,000
Retailing	£18,252,000	£39,257,000	£57,509,000
Catering	£24,462,000	£49,862,000	£74,324,000
Attractions/entertainment	£11,468,000	£17,739,000	£29,207,000
Transport	£10,750,000	£9,434,000	£20,184,000
Arising from non trip spend	£12,254,000	£0	£12,254,000
<b>Total Direct</b>	<b>£115,928,000</b>	<b>£117,320,000</b>	<b>£233,248,000</b>

\*Adjustments have been made to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments. It is assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Total business turnover supported by tourism activity	Staying visitor related	Day visitor related	Total
Direct	£115,928,000	£117,320,000	£233,248,000
Supplier and income induced	£27,997,000	£20,877,000	£48,874,000
<b>Total</b>	<b>£143,925,000</b>	<b>£138,197,000</b>	<b>£282,122,000</b>

## West Oxfordshire – Tourism related employment

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Having identified the value of turnover generated by visitor spending in each business sector it is possible to estimate the employment associated with that spending.

The use of visitor expenditure to generate job numbers underestimates the number of jobs arising in the attractions/entertainment sector. The underestimate arises because local authorities and voluntary bodies do not always seek to recoup the full operating costs of individual attractions or facilities from entrance charges. Therefore an additional percentage of direct employment is added to the attractions sector estimates to take account of this factor.

This section of the report looks at employment on three levels;

- **Direct Jobs** - Direct jobs are those in businesses in receipt of visitor spending. For example, jobs supported by visitor spending at a hotel would be direct jobs.
- **Indirect Jobs** - Indirect employment arises as a result of expenditure by businesses in direct receipt of visitor expenditure on the purchase of goods and services for their businesses. For example, some of the employment at a business supplying food and drink may be supported through the supplies that the business sells to hotels (or any other business in direct receipt of visitor expenditure).
- **Induced Jobs** - Induced jobs are those that are supported by the spending of wages by employees in direct and indirect jobs. Such spending will be spread across a wide range of service sectors.

Estimates are shown for actual jobs and full time equivalent jobs (FTE's).



# West Oxfordshire – Tourism related employment

## Estimated actual employment



## Full time equivalent employment (FTE's)



Direct employment in businesses in receipt of visitor expenditure (FTE's)	Staying visitor related	Day visitor related	Total
Accommodation	522	14	536
Retailing	125	268	393
Catering	341	695	1,036
Attractions/entertainment	165	255	420
Transport	61	53	114
Arising from non trip spend	195	0	195
<b>Total Direct</b>	<b>1,408</b>	<b>1,285</b>	<b>2,693</b>