

The Economic Impact of West Oxfordshire's Visitor Economy 2018

Produced on behalf of the West Oxfordshire District Council
By
The South West Research Company Ltd

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Introduction

This report examines the volume and value of tourism and the impact of visitor expenditure on the local economy in West Oxfordshire district in 2018. 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 2018, including key facts about the economy, weather and key events please see Appendix 2 of this report.



Value of Tourism 2018

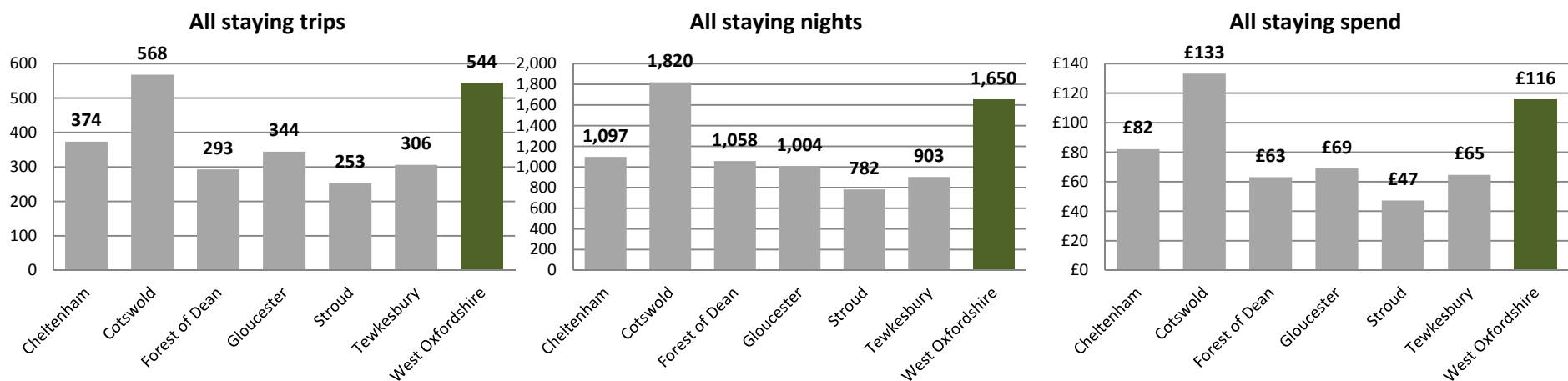
West Oxfordshire

Key Facts	
544,000	Staying visitor trips
1,650,000	Staying visitor nights
£115,678,000	Staying visitor spend
3,428,000	Day visits
£124,980,000	Day visitor spend
£240,658,000	Direct visitor spend
£13,435,000	Other related spend
£254,093,000	TOTAL VISITOR RELATED SPEND
£291,034,000	TOTAL BUSINESS TURNOVER SUPPORTED
4,927	Estimated actual employment
3,568	FTE employment
8%	Proportion of all employment

West Oxfordshire – Staying visits

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	321	53	751	346	£59	£23
Cotswold	503	65	1,330	490	£100	£33
Forest of Dean	256	37	699	359	£42	£21
Gloucester	294	50	672	332	£49	£19
Stroud	218	35	531	251	£33	£14
Tewkesbury	266	40	648	255	£47	£17
West Oxfordshire	464	80	1,006	644	£78	£38

West Oxfordshire - Staying visits by accommodation type

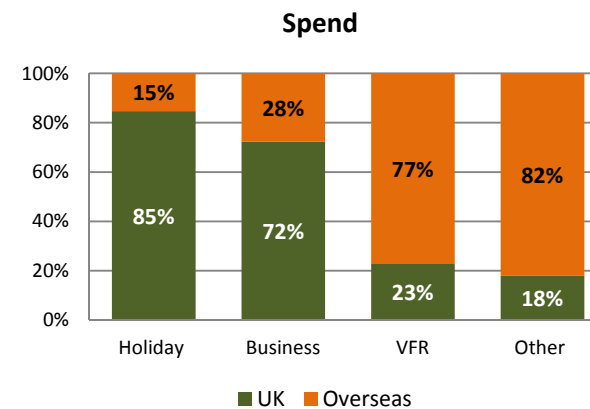
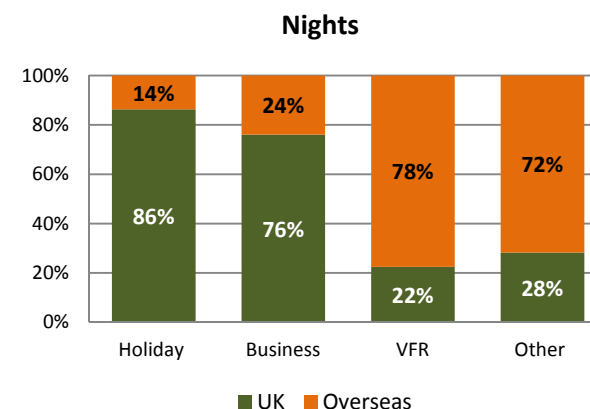
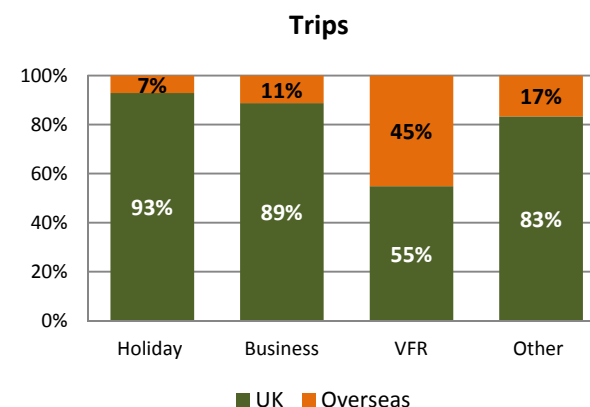
Domestic tourists	Trips	Nights	Spend
Serviced	293,200	521,000	£58,107,000
Self catering	15,800	49,000	£5,914,000
Touring caravans /tents	36,800	113,000	£5,414,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	2,900	60,000	£811,000
Boat moorings	0	0	£0
Other	1,900	3,000	£63,000
Staying with friends and relatives	113,700	260,000	£7,763,000
Total	464,400	1,006,000	£78,072,000

Overseas tourists	Trips	Nights	Spend
Serviced	23,000	76,000	£10,841,000
Self catering	8,900	164,000	£12,677,000
Touring caravans /tents	4,400	27,000	£713,000
Static vans/holiday centres	0	0	£0
Group/campus	0	0	£0
Paying guest in private homes	0	0	£0
Second homes	700	12,000	£504,000
Boat moorings	0	0	£0
Other	7,500	16,000	£1,157,000
Staying with friends and relatives	35,200	349,000	£11,714,000
Total	79,600	644,000	£37,606,000

West Oxfordshire - Staying visits by purpose

Domestic tourists	Trips	Nights	Spend
Holiday	314,000	701,000	£54,849,000
Business	79,000	162,000	£17,337,000
Visits to friends and relatives	51,000	130,000	£4,980,000
Other	20,000	13,000	£905,000
Study	0	0	£0
Total	464,000	1,006,000	£78,072,000

Overseas tourists	Trips	Nights	Spend
Holiday	24,000	111,000	£9,891,000
Business	10,000	51,000	£6,647,000
Visits to friends and relatives	42,000	449,000	£16,917,000
Other	4,000	33,000	£4,150,000
Study	0	0	£0
Total	80,000	644,000	£37,606,000

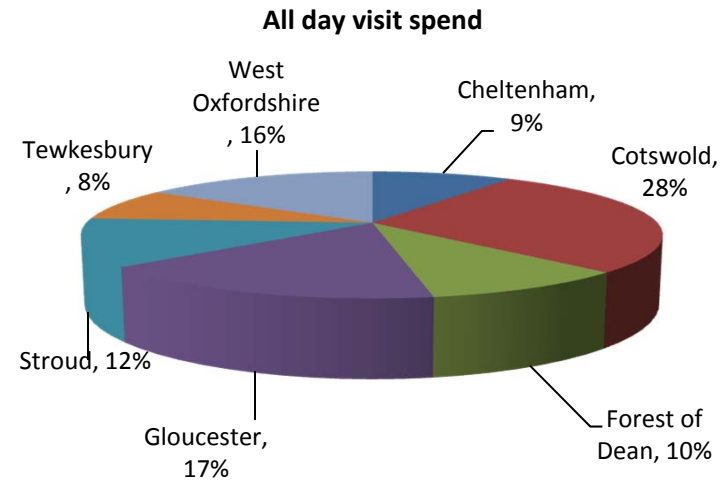
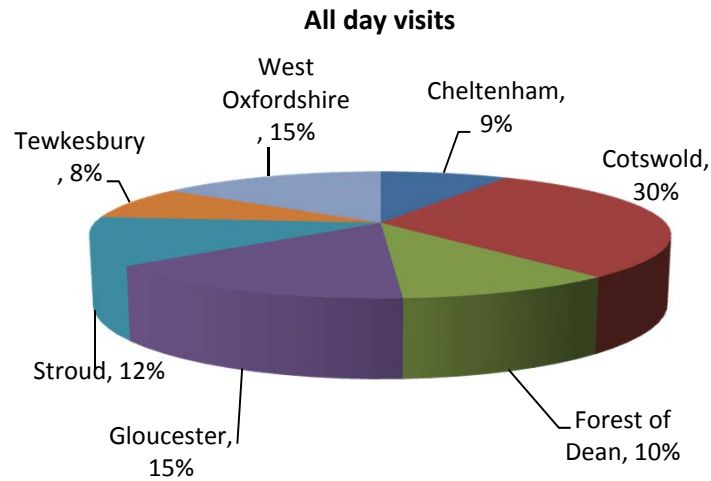


West Oxfordshire – Day visits

Information on day visits within this report has been derived from the 2018 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.

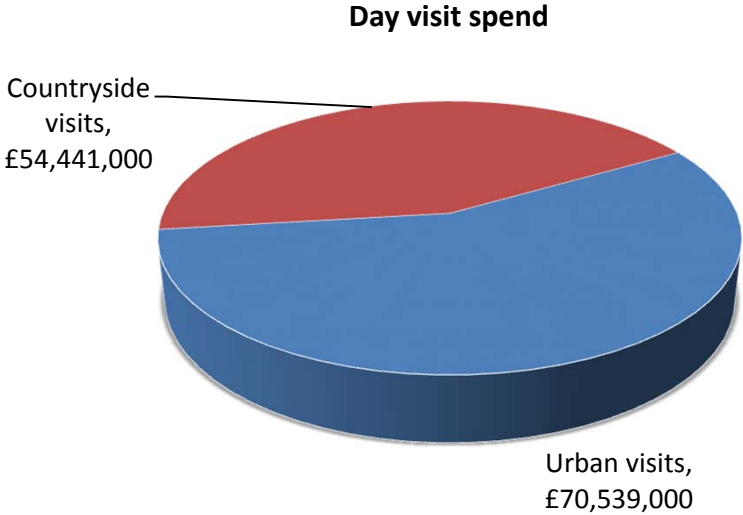
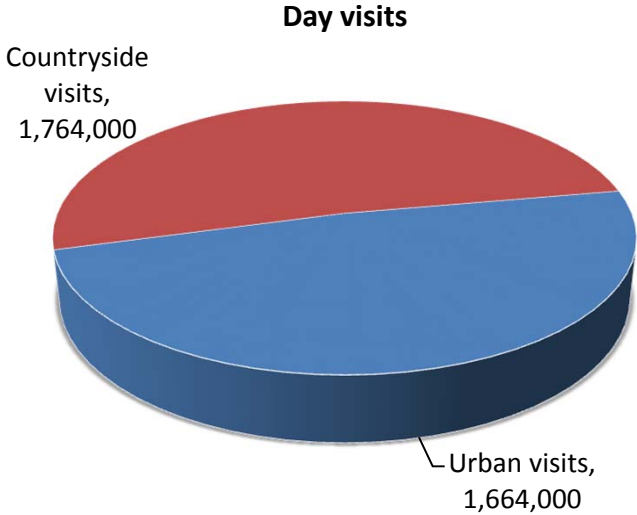
West Oxfordshire - Day visits comparisons



Area	Day visits	Day visit spend
Cheltenham	1.9	£74.6
Cotswold	6.8	£222.3
Forest of Dean	2.3	£77.6
Gloucester	3.5	£133.0
Stroud	2.8	£96.3
Tewkesbury	1.9	£64.3
West Oxfordshire	3.4	£125.0

West Oxfordshire - Day visits by location

Total day visits	Total day visit spend
3,428,000	£124,980,000



West Oxfordshire - Direct visitor expenditure by category

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 £29,372,000
- Overseas staying visitors £10,328,000



Shopping

- UK staying visitors £9,211,000
- Overseas staying visitors £10,732,000
- Day visitors £41,371,000



Food & drink

- UK staying visitors £17,621,000
- Overseas staying visitors £8,494,000
- Day visitors £51,494,000



Attractions/entertainment

- UK staying visitors £7,691,000
- Overseas staying visitors £4,249,000
- Day visitors £16,587,000



Travel

- UK staying visitors £14,177,000
- Overseas staying visitors £3,802,000
- Day visitors £15,528,000

West Oxfordshire – Other visitor related expenditure by category



Second Homes

£4,170,000



Visiting friends and relatives (non-visitor spend)

£9,265,000

- 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	£40,223,000	£1,030,000	£41,253,000
Retailing	£19,743,000	£40,957,000	£60,700,000
Catering	£25,332,000	£49,949,000	£75,281,000
Attractions/entertainment	£12,400,000	£17,515,000	£29,915,000
Transport	£10,788,000	£9,317,000	£20,105,000
Arising from non trip spend	£13,435,000	£0	£13,435,000
Total Direct	£121,921,000	£118,768,000	£240,689,000

*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	£121,921,000	£118,768,000	£240,689,000
Supplier and income induced	£29,485,000	£20,860,000	£50,345,000
Total	£151,406,000	£139,628,000	£291,034,000

West Oxfordshire – Tourism related employment

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	584	15	599
Retailing	150	311	462
Catering	318	628	946
Attractions/entertainment	179	253	433
Transport	63	54	117
Arising from non trip spend	213	0	213
Total Direct	1,508	1,261	2,769