



Oxford destination report



VisitEngland Destination tracker:

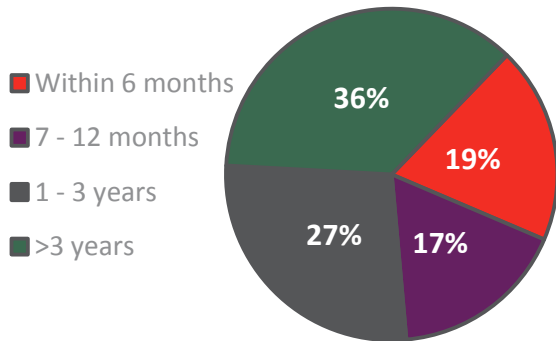
- Since April 2015, the national tourist boards of VisitEngland, VisitScotland and VisitWales have been tracking visitor perceptions of holiday destinations across GB in a single research vehicle.
- Data in this report is from April 2015 – September 2016
- This study explores **behavioural and experience measures** such as, visitation, spend, stay length, satisfaction and advocacy within individual destinations. As well as the **imagery perceptions** of each destination.
- In the report there are 3 samples for comparison; those from whom this destination was the most recently visited, those who claim to visit a city destinations at C52 and finally a GB average.
- All respondents are GB holiday takers, having taken a GB break in the past 12 months or are expecting to in the next 12 months. This accounts for approx. 49% of the population.
- Significant differences will be indicated by a **black**↑/**orange**↓ arrow against city destinations and a **blue**↑/**red**↓ against GB.
- This report provides a snapshot of:
 1. A demographic split of destination visitors
 2. The behaviours exhibited at the destination: How loyal are they to the destination and how satisfied were they with their trip?
 3. How GB holiday makers perceive this destination and how does it compare with others?
- Finally there is a summary of findings.

Who is visiting?

Ever Visited Oxford :

53%

Time since last visit



Visited destination in the last 3 years

Gender	Oxford	Cities	Great Britain
Male	52%	51%	49%
Female	48%	49%	51%

Age	Oxford	Cities	Great Britain
18-24	18%	16%	14%
25-34	18%	18%	16%
35-44	22%	17%	17%
45-54	16%	18%	18%
55-64	11%	15%	15%
65+	15%	16%	20%

Region of origin	Oxford	Cities	Great Britain
Wales	5%	5%	5%
Scotland	6%	10%	9%
North East	2%	5%	4%
North West	10%	12%	11%
Yorkshire/ Humberside	9%	8%	9%
East Midlands	5%	7%	7%
West Midlands	9%	8%	9%
East Anglia / East of England	8%	10%	10%
Greater London	19%↑↑	13%	13%
South East	17%↑	12%	14%
South West	10%	9%	9%

*Please note respondents can have visited more than one destination in the last 3 years

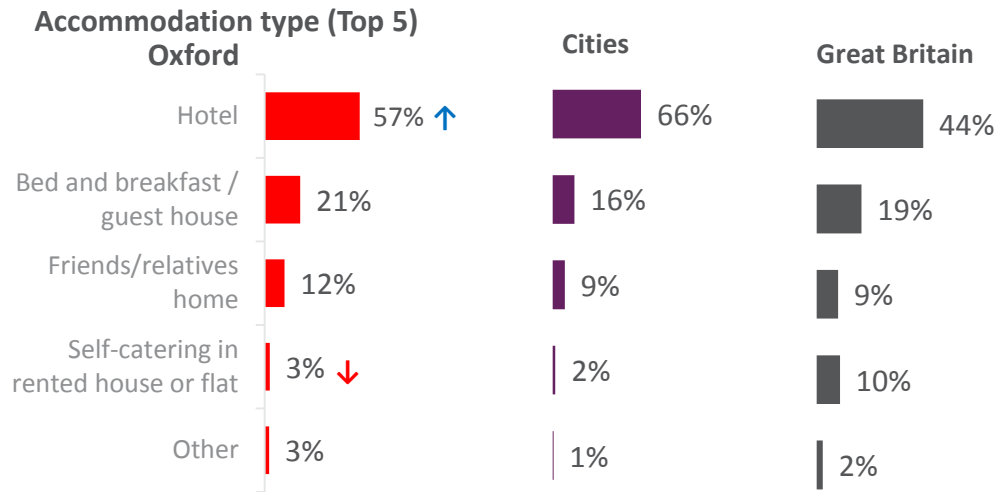
JUST OVER HALF OF GB HOLIDAY MAKERS HAVE VISITED OXFORD. THE DEMOGRAPHIC PROFILE OF VISITORS TO OXFORD IS IN LINE WITH THE REST OF THE COUNTRY, BUT THERE IS A SMALL SKEW TOWARDS 35-44 YEAR OLD VISITORS.

Base: Oxford reduced destination list n=691 Oxford last 3 years reduced destination list n=203 City destination n= 4115 Total base n=12771

Significant differences will be indicated by a black↑/orange↓ arrow against city destinations and a blue↑/red↓ against GB



Where are they staying? – among most recent visitors



Accommodation Quality	Oxford	Cities	Great Britain
1 star	0%	1%	1%
2 star	7%	6%	6%
3 star	37%	36%	36%
4 star	36%	36%	33%
5 star	7%	8%	7%
Don't know/ Can't Remember	13%	13%	17%

THE ACCOMMODATION CHOICES MADE BY VISITORS TO OXFORD MIRROR THOSE MADE BY VISITORS TO OTHER GB DESTINATIONS. THERE ARE SOME NUANCES BETWEEN OXFORD AND OTHER CITIES: IN OXFORD FEWER VISITORS USE HOTELS, PREFERRING INSTEAD BED AND BREAKFASTS OR TO STAY WITH THEIR FRIENDS AND FAMILIES.

Base: Most recently visited destination Oxford n=109 City destination n= 4115 Total Base n=12179
Question name: In tables

Significant differences will be indicated by a black ↑/orange ↓ arrow against city destinations and a blue ↑/red ↓ against GB

Consideration, satisfaction & intention to visit

Loyalty Ladder	Oxford destination average	Cities destination average*	Great Britain destination average*
Loyal (I often/sometimes take holidays there and intended to in the next year/couple of years)	14%	17%	17%
Considerers (I have been/never been to this destination before but would like to in the future)	53%	49%	48%
Rejecters (I have been/never been to this destination before and am not likely to do so in the future)	27%	24%	26%
Satisfaction	36%	46%	48%
Likelihood to revisit	7.9	8.6	8.4
Base n=	691/109	4115	12179

OXFORD HAS RELATIVELY FEW LOYALISTS WHEN COMPARED TO OTHER GB DESTINATIONS BUT HAS A HIGHER NUMBER OF DOMESTIC HOLIDAY MAKERS CONSIDERING VISITING THE CITY. AMONG VISITORS, OXFORD'S SATISFACTION RATE AND LIKELIHOOD TO REVISIT THE DESTINATION ARE LOWER THAN OTHER DESTINATIONS ACROSS THE COUNTRY.

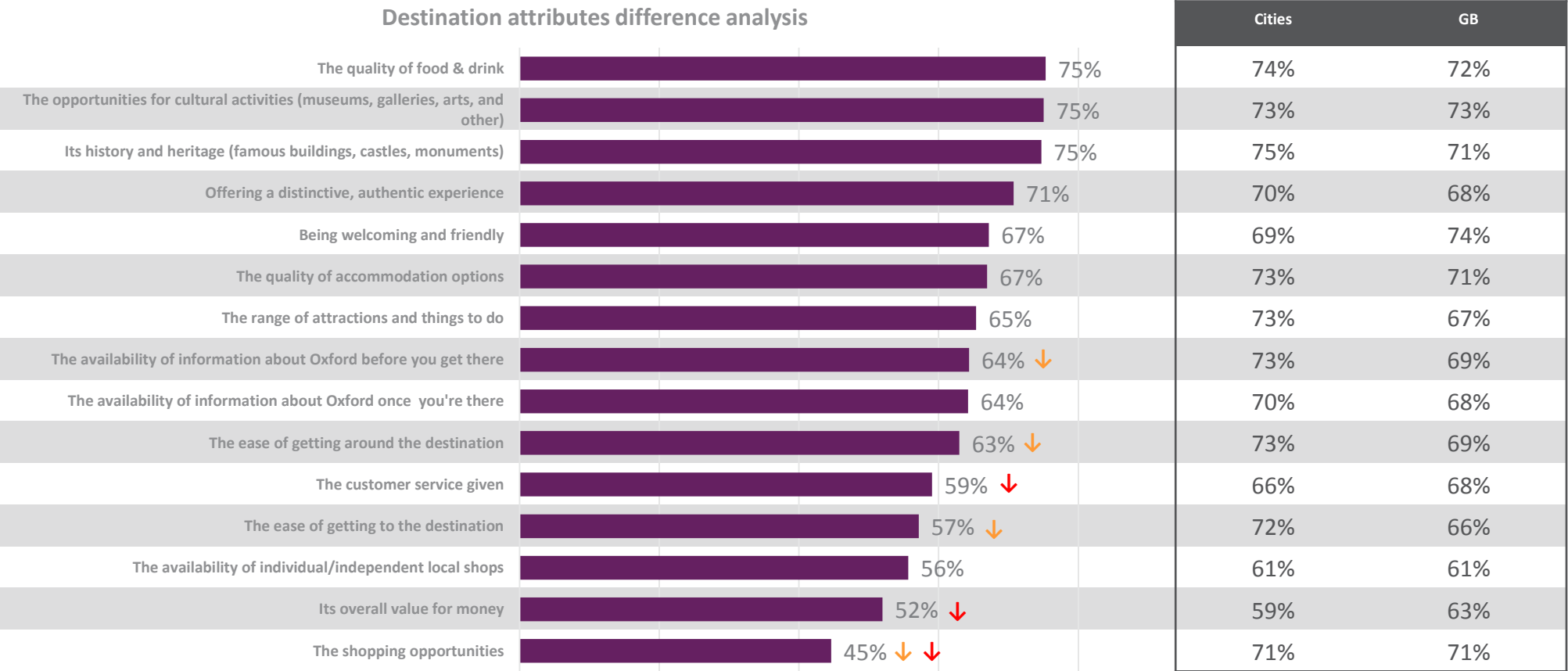
Base: In table Asked of all Oxford shown on rotation from reduced destination list / Most recently visited destination

Question name: In tables

* Averages taken manually from summing each destination, not via nett.

Destination attribute satisfaction – among visitors to Oxford

Destination attributes difference analysis



OXFORD IS MOST COMMONLY RECOGNISED BY VISITORS AS A DESTINATION RICH WITH CULTURAL PURSUITS SUCH AS HISTORY, HERITAGE AND QUALITY CULINARY EXPERIENCES. YET, THE DESTINATION DOES NOT OUTPERFORM ANY OTHER DESTINATION ON SATISFACTION ATTRIBUTES.

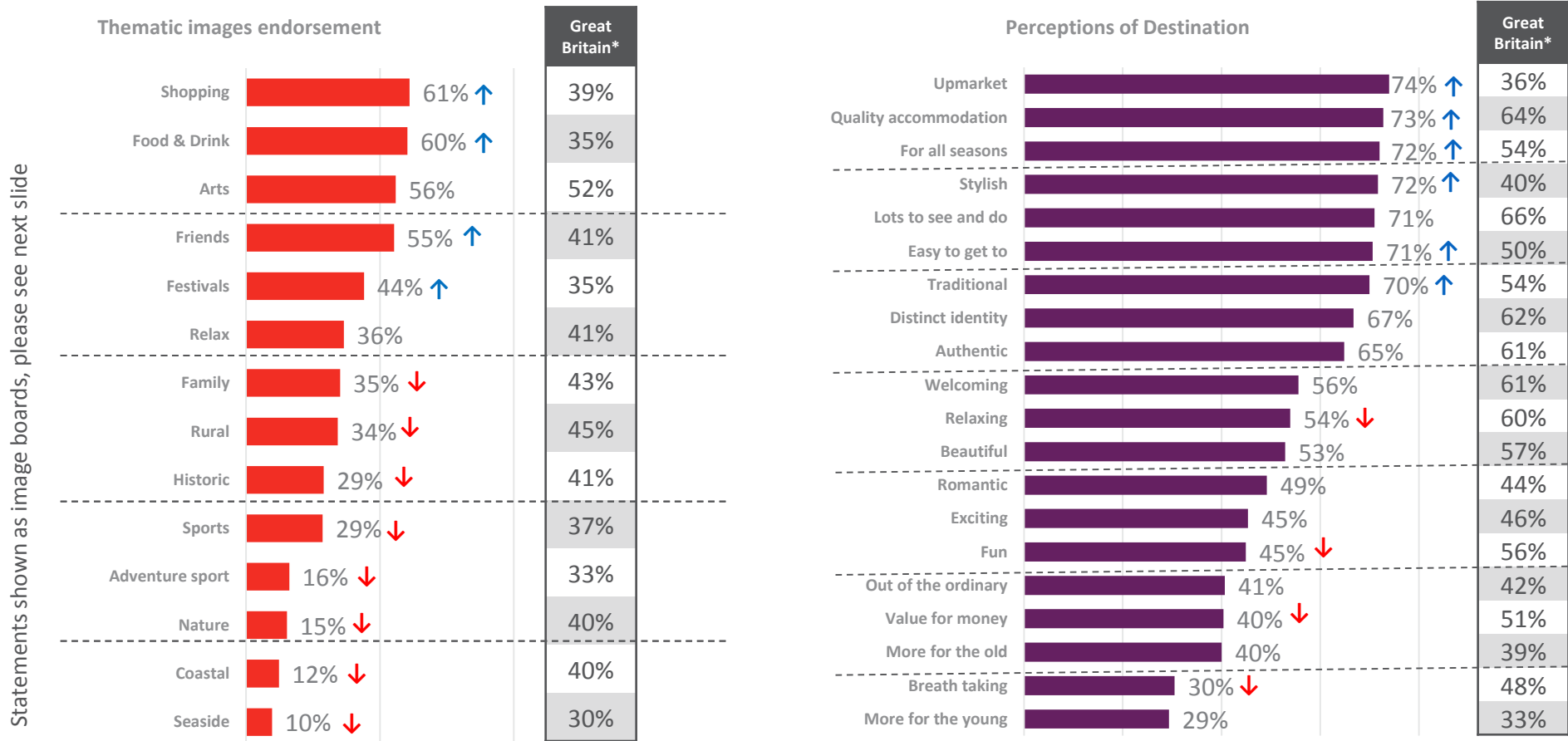
Base: Oxford n=109, Cities =4115 total n=12179
Question name: C90 Destination attributes

Significant differences will be indicated by a black ↑/orange ↓ arrow against city destinations and a blue ↑/red ↓ against GB



Destination attribute perception - among GB holiday makers

These questions ask how destinations are perceived generally, not how each was rated on a recent trip. The question is asked of visitors and non-visitors.



Statements shown as image boards, please see next slide

AMONG DOMESTIC HOLIDAY MAKERS, OXFORD IS SEEN AS A TRADITIONAL, STYLISH AND UPMARKET DESTINATION. THE CITY IS ASSOCIATED WITH GOOD FOR SHOPPING (IN CONTRAST TO THE VIEW OF ACTUAL VISITORS), FESTIVALS AND FOOD AND DRINK. DOMESTIC HOLIDAY MAKERS HOWEVER, DO NOT SEE OXFORD AS FUN OR RELAXING, NOR IS IT SEEN AS BEING GOOD VALUE FOR MONEY.

Base: Oxford n=273, n=12179
Question name: C90 Destination attributes

Significant differences will be indicated by a black ↑/orange ↓ arrow against city destinations and a blue ↑/red ↓ against GB



* Averages taken manually from summing each destination, not via nett.

The theme boards

Image boards (E30/35)

Shopping



Seaside



Rural



Relax



Nature



Historic



Adventure



Friends



Food & drink



Festivals



Family



Coastal



Arts



Sports



Word associations (E40/45)

- Beautiful
- Breath-taking
- Distinct culture
- Traditional
- Authentic
- Relaxing
- Quality accommodation
- Fun
- Friendly
- Romantic
- Surprising
- Exciting
- Out of the ordinary
- Value for money
- For all seasons
- Stylish
- More for the old
- Easy to get to
- Upmarket
- More for the young

Summary: Oxford

- Just over half of GB holiday makers have visited Oxford. The demographic profile of visitors is similar to the rest of the country, but has a small skew towards 35-44 year olds.
- Similarly, the accommodation choices made by visitors to Oxford are in line with other cities. There is however a subtle difference in accommodation choices, as visitors to Oxford are less likely than visitors to other cities, to stay in a hotel and are more likely to use B&B's or stay with their families.
- In terms of destination appeal, Oxford is fairly standard with minor differences to other cities: there are fewer loyalists but more considerers.
- A notable difference between Oxford and other cities is that visitors to Oxford leave with a lower level of satisfaction and likelihood to revisit. The reason behind this could stem from the difference in perceptions between GB holiday makers generally and those who have visited the destination i.e. visitors get a different experience to what they are expecting.
- GB holiday makers see Oxford as an upmarket, stylish destination, with lots to see and do
- Among visitors, the city has a less differentiated satisfaction profile and performs below average of other destinations for shopping and ease of success
- Some perceptions are shared by both groups, both GB holiday makers and visitors alike point to elements of culture, history and tradition as strengths of Oxford and it is recognised that the city has a distinctive identity.
- **A watch out:** For Oxford low satisfaction levels and rates of likely re-visitation provide a challenge. Oxford has a high level of consideration (interest in visiting) but less positive satisfaction and intent to revisit.