

**PEMBROKESHIRE
COUNTY COUNCIL**

STEAM REPORT 2008

PEMBROKESHIRE COUNTY COUNCIL

STEAM REPORT 2008

CONTENTS

1. OVERVIEW OF STEAM	6 pages
2. TOURISM IMPACTS MONITOR	2 pages
3. NUMERIC EXECUTIVE SUMMARY	1 page
4. EXPENDITURE	
Direct vs Indirect	Pages 1-2
Analysis by Sector of Expenditure	Pages 3-6
Analysis by Category of Tourist	Pages 7-9
5. VISITOR DAYS AND NUMBERS	
Visitor Days	Pages 10-12
Visitor Numbers	Pages 13-15
6. VEHICLE NUMBERS	
Vehicle Numbers	Page 16
Vehicle Days	Page 16

APPENDICES

Appendix 1 2008

Economic Impact	Page 1.1
Population	Page 1.2
Employment	Page 1.2
Tourist Days / Tourist Numbers	Page 1.3
Vehicle Days / Vehicle Numbers	Page 1.3
Bed Stock	Page 1.3

Appendix 2 2007

Economic Impact	Page 2.1
Population	Page 2.2
Employment	Page 2.2
Tourist Days/ Tourist Numbers	Page 2.3
Vehicle Days / Vehicle Numbers	Page 2.3
Bed Stock	Page 2.3

Appendix 3 Glossary of Terms	Page 3.1-3.2
Appendix 4 Economic Effects	Page 4.1
Appendix 5 Employment	Page 5.1
Appendix 6 Day visitors and their impacts in STEAM	Page 6.1-6.2
Appendix 7 Statistical confidence levels in STEAM	Page 7.1
CHARTS	
Tourist Days	Chart 1
Tourism Expenditure: By Month	Chart 2
Tourism Expenditure 2008: By Type of Tourist: By Month	Chart 3
Tourism Expenditure: By Industry Sector: 2008 & 2007	Chart 4
Annual Tourism Expenditure 2005-2008	Chart 5



OVERVIEW OF STEAM

1. INTRODUCTION

The Scarborough Tourism Economic Activity Monitor is derived from a model developed by David James and Frank Hart in the process of developing a ten-year tourism policy for the province of Saskatchewan, Canada, in 1981. In 1985, following the establishment of Canada's National Task Force on Tourism Data, Messrs. Hart and James were appointed co-Chairmen of the Working Party to consider Local Area Statistics. This work focused on the city of Edmonton, Alberta, Canada, and became the first attempt to develop the effective use of supply-side generated local area tourism statistics drawing on the model developed in Saskatchewan in 1981. Encouraged by the successful experiment in Edmonton, the outputs of which were accepted by Edmonton City Council and its Convention and Tourism Authority, a part experiment focused on the City of Toronto's convention business followed. This experiment provided much needed data for the Toronto Convention Bureau.

In 1988, David James was appointed Director of Tourism and Amenities for Scarborough Borough Council and it was in that context that the Local Area Tourism Statistics model was transferred to the UK. The model was first run on behalf of Scarborough Borough Council in 1990. In 1991, the North Yorkshire County Council, together with the District Councils in the County, embarked on a pilot programme to evaluate the now-named "Scarborough/Scottish Tourism Economic Activity Monitor" (STEAM). At the same time, STEAM was adopted by a number of Local Authorities in England, Scotland and Wales.

2. VALIDATION OF STEAM

The STEAM process has been validated within the context of a number of public and private initiatives which have taken place since 1987 in respect of tourism statistics.

In 1987, a Tourism Statistics Advisory Group (TSAG) was established by the Employment Department to establish a forum to create strategic oversight of statistics relevant to tourism and leisure. Very early in its work it identified the need to review present and future needs for national tourism statistics, and in order to do this needed to establish commercial user needs.

In 1990, The Tourism Society, with the support and involvement of the Employment Department, by means of a small working group, established a forum to be held on 18 April 1991, which assembled over seventy senior managers. The forum, chaired by Liam Strong, Director of Marketing and Operations at British Airways, and in the presence of Viscount Ullswater, then Minister for Tourism, unanimously established the Joint Industry Committee for Tourism Statistics (JICTOURS). The press release issued that day stated:

"The agreement reached at this meeting represents the best opportunity the commercial sector has had to improve UK tourism statistics for over a decade. JICTOURS will develop a costed package of development proposals for tourism statistics to be agreed, implemented and funded in partnership between Government (Employment Department), Commercial Users in the industry and Tourist Boards."

JICTOURS established sub-groups to consider the sector needs for Tourism Statistics, one sector being "Local Authorities". Its paper defined the sector, its needs, use of existing data, key terms/categories to be measured, willingness to pool data and model criteria. This last element stated the following:

“It is understood that, at least in the foreseeable future, national surveys will never be conducted on a scale (size of samples) which will make it possible to disaggregate data at District level. Accepting that as a fact of life, Districts wish to see the development of approved statistical models for estimating volume, value and expenditure and basic tourism characteristics. Such models, to be endorsed as suitable for tourist board and government purposes, would have to be relevant to the different types of authority noted in Section 1.

They would draw on available survey data, be used to produce estimates according to agreed statistical criteria and be adjusted to meet local circumstances.

Because such models could be capable of application in different authorities around Britain it is recommended that their construction should be part of the JICTOURS recommendations.”

Following meetings between Professor Victor Middleton, Chairman of JICTOURS, Brian Batty, Employment Department, and David James, it was agreed that a JICTOURS Local Statistics Tourism Group (LSTG) should be formed made up of representatives from the National Tourist Boards, Regional Tourist Boards, the Association of District Councils, the British Resorts Association, various Local Authorities and, initially, the Employment Department, subsequently, the Department of National Heritage. JICTOURS – LSTG commissioned an independent study of STEAM, which was carried out by Professor Stephen Wanhill of the University of Wales. The main objectives were:

- 1. To conduct a critical analysis of the working process of the model highlighting both its strengths and weaknesses.**
- 2. To comment on the quality of information (accommodation occupancy, stock levels, tariff rates, necessary for the model to be run on a reliable and consistent basis).**
- 3. To comment on the sensitivity analysis completed and to make suggestions for any further work on sensitivity analysis required.**
- 4. To comment on the methodology for estimating indirect expenditure and in particular the estimates produced by the model on tourism employment.**
- 5. To comment on the computer programmes used to generate the estimate produced by STEAM.**
- 6. To comment on the “adjustment processes” which take place with the tourism experts in the area once the provisional results are produced by the model.**
- 7. To make any other comments the researchers consider necessary. For example, definitions, future improvements and the need for additional national, regional and local benchmarks to further improve the output of the model.**

As much of the model, its formulae and its processes are commercially confidential, and are required to remain so, it was necessary that Professor Wanhill was given full access to the model, its workings and all background material. At the JICTOURS – LSTG meeting, 23 December 1993, his findings were presented in full, but where it involved the formulae of the model it was on the basis of strict confidentiality to the members of JICTOURS – LSTG. Subsequently the Department of National Heritage and the National Tourist Boards of England, Scotland and Wales each received the full text of his report. In brief, Professor Wanhill’s report can be summarised best by himself:

“The report’s overall conclusion is that STEAM is mathematically acceptable as a model of tourism flows, but never can be, and does not pretend to be, a statistically robust measurement of tourism in the manner of randomly drawn sample surveys of visitors. The thorough study is supportive of the model but also makes a number of recommendations to improve STEAM.”

At its next meeting, 23rd February 1994, following confirmation that the recommendations to improve STEAM had been adopted, it was agreed “no further testing needed to be initiated for the group’s purposes. David James sought and obtained the group’s endorsement of the STEAM model.”

During 1995, Professor Victor Middleton prepared a report for the British Resorts Association, “Measuring the Local Impact of Tourism”. The STEAM model and methodology was made available to the author. The report reviewed a variety of modelling approaches, their strengths and weaknesses, and, for STEAM, stated,

“It seems probable that supply side (bottom up) models, of which this is the leading example in the UK, will be needed to fulfil the management requirements of local authorities who have decided to play a significant role in managing tourism locally.”

Concurrently, in Denmark, an evaluation process was conducted on behalf of the Danish Ministry of Business and Industry by the Danish Tourist Board. STEAM is handled in Denmark, on behalf of GTS (UK) Ltd, by the Bornholm Research Centre.

In 1996, the Department for Culture, Media and Sport, in conjunction with the National Tourist Boards and the University of North London, set out to review the existing situation concerning local area statistics with a view to publishing guidance for Local Authorities. This evolved and was concluded by the DCMS publishing a set of Guidance Notes on Local Area Statistics which was published in 1998.

The development of STEAM in England since 1993 has been a period of steady sustained growth with, presently, nearly 200 clients, including East Midlands Tourism, the Northwest Regional Development Agency, One NorthEast, most National Parks, and numerous Local Authorities. These Local Authorities are of all sizes ranging from Rutland to Birmingham, and all types, whether urban, rural, resort or industrial.

In Scotland, during the three year period ending 1997, Scottish Enterprise Network (SEN), in conjunction with its thirteen Local Enterprise Companies, embarked on a practical evaluation of STEAM examining not only the capacity of the model, but the robustness of the local variable inputs. Considerable collateral primary research was commissioned by SEN concerning rates of daily expenditure, length of stay, and stays with friends and relatives. This led, subsequently, to a five-year contract on behalf of a partnership led by the Scottish Tourist Board, Scottish Enterprise, Highlands & Islands Enterprise, the Local Enterprise Companies and the Area Tourist Boards. Latterly, this contract has been renewed by VisitScotland until 2008 with an option for two more years.

In 1997, Tourism South and West Wales was licensed by GTS (UK) Ltd to operate STEAM throughout Wales and TSWW provided STEAM reports for nineteen Welsh Unitary Authorities for a four-year period. Since 2002, GTS (UK) Ltd now provides a continuing service for all 22 Welsh Unitary Authorities, two National Parks in Wales and the Statistical Directorate of the National Assembly for Wales. These programmes are co-ordinated in Wales by the company's Projects Manager (Wales).

Since 2007, STEAM has been expanding its development in Northern Ireland with, presently, two Tourism Partnership Areas and 15 Local Councils benefiting from STEAM reports.

3. A BRIEF OUTLINE OF STEAM

3.1 STEAM - The Model

STEAM is a spreadsheet model, which is more of a process in which the values of the relationships or equations defined on the spreadsheet are specified at each stage by the user. Thus, although the logic of the model is constant, the nature of data input will alter from area to area depending on the amount of survey material available and qualitative expert opinion concerning the structure of the tourism sector in the local economy. It is not a statistically estimated model in the manner of an input-output model of the local economy. The model is designed to provide a robust indicative base for monitoring trends based on monthly and annual outputs within acceptable statistical confidence levels. This statement forms the background to the objectives of the study and the methodological processes applied.

STEAM approaches the measurement of tourism at the local level from the supply side, which has the benefit of immediacy and relative inexpensiveness. The traditional measurement of tourism activity is from the demand side, but, as is well known, surveying visitors is both time-consuming and costly. This is further complicated when economic impact assessment is made, which requires surveys of businesses and the consumption patterns of local people. STEAM is not designed to provide a precise and accurate measurement of tourism in a local area, but rather to provide an indicative base for monitoring trends. The confidence level of the model is calculated to be within the ranges of plus or minus 10% in respect of the yearly outputs and plus or minus 5% in respect of trend.

STEAM reports are produced on behalf of clients by a technical team located at the GTS (UK) Ltd Data Processing Centre in New Holland and also in Swansea. A rigorous quality control regime is in place to ensure the highest standards are consistently maintained.

3.2 The STEAM Outputs

STEAM quantifies the local economic impact of tourism, from both stay and day visitors, by

- *Analysis of bed stock (by category month by month, year on year);*
- *Analysis of bed stock seasonal availability (by category of accommodation);*
- *Estimates of revenue generated by tourists (by category of accommodation and distribution by activity by month);*
- *Categories of serviced accommodation will be: under 10 rooms; 11-50 rooms; over 50 rooms; over 100 rooms;*
- *Categories of non-serviced accommodation: Camping and Caravanning (Touring); Caravanning (Static); Flats, Chalets and Cottages; Hostels; Schools and Colleges;*
- *Estimates of number of tourists and number of tourist days (by category of accommodation by month);*
- *Estimates of employment supported by tourism;*
- *Estimates of traffic implications of tourism (by month);*
- *Trend information annually for all output categories by zone.*

3.3 STEAM Inputs

At a minimum, the implementation of STEAM depends on:

- **Information on occupancy percentages each month for each type of accommodation;**
- **Bed stock for each type of accommodation within the areas to be surveyed;**
- **Attendance at attractions/major events by month;**
- **TIC visitor figures by month.**

The model is built up from the above basic information, by drawing on data from published or unpublished sources, local interviews and supplementary trade enquiries to define the economic parameters within which the local tourism sector operates. The specific information set out above is obtained from a variety of sources:

a) **Bed Stocks**

The STEAM model can accommodate up to nine sub-categories of Serviced Accommodation, and the same for Non-Serviced Accommodation. The type and number of such sub-categories of tourist accommodation are specified in conjunction with the client using definitions compatible with national definitions. The sources of information in building such a database are Local Authority Tourist Guides, Tourist Boards, Internet, Yellow Pages.

b) **Number of Establishments**

The same categories and sub-categories are used as for “Bed Stocks” and use the same sources of information.

c) **Use of Tourist Accommodation**

This information is primarily obtained from the Tourist Board occupancy surveys and, on occasion, augmented by information obtained from Local Authority occupancy surveys and information provided, in confidence, by groups of accommodation providers.

d) **Tourist Accommodation: Employment**

STEAM has developed a large array of data sets which provide core employment data by type and size of accommodation providers and the occupancy thresholds which trigger incremental levels of employment.

e) **Staying with Friends and Relatives**

Through primary research, STEAM has created an array of proxy variables which can be used in various types and sizes of destination. Wherever and whenever practicable these various proxy variables are benchmarked by additional local research in differing destination types.

f) Day Visitors

STEAM Tourist Day Visitors are regarded as those day visiting whose stay is three hours or more for a non-routine purpose originating outside the local area, whether from home or from a non-resident accommodation outside the object area. National and regional day visitor surveys present ongoing opportunities for benchmarking provided they are statistically valid in the context of the local area.

Information is also obtained on a monthly basis from attractions and events in an area which, together with Tourist Information Centre visitors, provides additional local benchmarking information concerning seasonality and monthly changes, year on year.

g) Rates of Daily Expenditure

Following primary research commissioned by Scottish Enterprise in 1996 from System Three (now TNS), a series of subsequent tourism expenditure surveys have been commissioned over the years by local authorities in conjunction with GTS structured specifically for the STEAM input demands. Whilst commissioned for specific areas, the consistency and frequency of these surveys has allowed the development of proxy values for other areas not able to afford such surveys.

h) Economic Multipliers

Multipliers, in respect of both tourist economic impacts and employment generated indirectly, are calculated using multipliers created by the Surrey Group for an array of destination types.

i) Indexing

STEAM Reports are all indexed so that year on year real comparisons can be made rather than inflation affected. Within each report, Appendices 1 and 2 provide non-indexed outputs so that tourism economic impacts for both the present and past years can be compared in actual values.

j) Benchmarking

STEAM takes advantage of all available benchmarking sources, including the United Kingdom Tourist Statistics, the International Passenger Survey, the United Kingdom Leisure Day Visitor Survey, the National Online Manpower Information Service, Local Surveys and those prepared commercially from time to time.

4. STEAM REPORT FORMAT

4.1 Introduction

Each STEAM Report consists of four main sections:

- Numeric Executive Summary
- Comparison Tables
- Appendices
- Charts

4.2 Numeric Executive Summary (NES)

This page provides an annual headline summary for the reporting year which consists of five segments. Each segment makes comparisons between the current year and the previous year concerning each of the main topics which are summarised below:

a) Analysis by Sector of Expenditure

This segment of the NES identifies the distribution of visitor spending into the local economy. The year on year comparison eliminates inflationary effects by use of the Retail Price Index (RPI).

b) Revenue by Category of Expenditure

This segment illustrates the revenue generated in the local economy by the four main categories of visitor. (The RPI is also used).

c) Tourist Days

This segment identifies, by category of visitor, the annual number of Visitor Days spent in the local (study) area. Visitor Days are calculated by multiplying the staying visitors by average length of stay and adding the Day Visitors.

d) Tourist Numbers

The count of all visitors annually, regardless of their length of stay.

e) Sectors in which Employment is Supported

This information is provided in the form of full time equivalents (FTE's) by category of employment. The employment indicated in STEAM reporting is only that generated by estimated visitor spending. There are employment generators other than STEAM; for example, residents' spend.

4.3 Comparison Tables (CT Pages)

This section of the report provides the monthly STEAM present and previous year outputs which form the basis for the previous section (NES). In addition, it provides monthly estimates of vehicle numbers and the days they spent in the study area.

4.4 Appendices

Appendix 1 (This Year) and **Appendix 2 (Last Year)** contain the full details by month and by year of:

- Economic Impact
- Population
- Employment
- Tourist Days/Tourist Numbers
- Vehicle Days/Vehicle Numbers
- Bed Stock

Appendix 3

Provides a glossary of terms which is self-explanatory.

Appendix 4

Considers the relationship of direct and indirect effects of tourism.

Appendix 5

Sources some of the data available by which the employment generated by visitor expenditure can be estimated.

Appendix 6

Reviews Day Visitors and their impacts.

Appendix 7

Report on statistical confidence levels in STEAM.

4.5 Charts

Provides an indicative group of charts. These charts illustrate the capacity of the Excel spreadsheet to generate them. Appendices 1 and 2 of the electronic report are the basis for their generation.

5. Contact:

David J. James, TD, FTS, FRSA
Managing Director
Global Tourism Solutions (UK) Ltd
2 Barleycroft
Filey Road
Scarborough
North Yorkshire
YO11 3AR

Tourism Impacts 2008

	UK	World
January	<p>Above average rainfall.</p> <p>UK consumer confidence fell sharply.</p>	<p>Eurozone and US consumer confidence fell.</p> <p>Favourable exchange rates for visitors to UK from US and Eurozone.</p>
February	<p>Above average temperature and sunshine.</p> <p>UK consumer confidence continued to fall.</p>	<p>Oil at \$100 per barrel.</p> <p>US consumer confidence declined further, and value of \$ fell.</p> <p>Eurozone consumer confidence also fell.</p>
March	<p>Easter Sunday on March 23rd.</p> <p>Snow over Easter in much of the UK. Above average rainfall for March.</p>	<p>Oil at \$110 per barrel and global food prices rise sharply.</p> <p>US & Eurozone consumer confidence continued to fall.</p>
April	<p>UK consumer confidence fell sharply again.</p>	<p>Oil at \$118 per barrel.</p> <p>Further fall in US consumer confidence.</p>
May	<p>Above average temperatures.</p>	<p>Oil up to \$135 per barrel, prompting further airline failures.</p> <p>Continued decline in US & Eurozone consumer confidence.</p>
June	<p>Average weather.</p>	<p>Euro remained strong against sterling.</p>

July	Exceptionally high rainfall. Consumer confidence continued to fall.	
August	Rainfall well above average, with flooding in parts of South and Mid Wales and NE England. UK consumer confidence at very low levels.	
September	Weather average. Activity in UK service sectors reduced at its fastest rate in 12 years this month, with hotels and restaurants especially affected.	Global financial markets hit by Lehman Bros bankruptcy.
October	Below average temperature and above average rainfall. UK consumer confidence fell further.	Sterling remained weak, benefitting inbound visitors. Price of oil fell to under \$70 per barrel. US & Eurozone consumer confidence decreased sharply. UNWTO reported rapid slowdown in international tourism.
November	Weather average.	Sterling at a record low against Euro.
December	Above average sunshine and below average rainfall. UK consumer confidence continued to fall.	US and Eurozone consumer confidence continued to fall.

PEMBROKESHIRE COUNTY COUNCIL

STEAM Report 2008

Numeric Executive Summary

All £'s 2008 indexed
(RPI Factor 07/08 +1.0407)

Issued 11 June 2009

Analysis by Sector of Expenditure (£'s millions)	2008	2007	% change
Accommodation	113.0	115.2	-2
Food & Drink	93.3	91.8	2
Recreation	31.3	30.7	2
Shopping	49.6	48.9	1
Transport	39.8	39.2	1
Indirect Expenditure	137.3	137.4	-0
VAT	57.2	57.0	0
TOTAL	521.4	520.3	0

Revenue by Category of Visitor (£'s millions)	2008	2007	% change
Serviced Accommodation	91.9	94.3	-3
Non-Serviced Accommodation	368.1	364.5	1
SFR	13.5	13.4	1
Day Visitors	47.9	48.1	-0
TOTAL	521.4	520.3	0

Tourist Days (Thousands)	2008	2007	% change
Serviced Accommodation	1,252	1,259	-1
Non-Serviced Accommodation	10,101	9,924	2
SFR	434	431	1
Day Visitors	1,868	1,877	-0
TOTAL	13,654	13,492	1

Tourist Numbers (Thousands)	2008	2007	% change
Serviced Accommodation	620	609	2
Non-Serviced Accommodation	1,550	1,548	0
SFR	182	181	1
Day Visitors	1,868	1,877	-0
TOTAL	4,220	4,215	0

Sectors in which Employment is supported (FTE's)	2008	2007	% change
Direct Employment			
Accommodation	9576	9752	-2
Food & Drink	2176	2142	2
Recreation	885	869	2
Shopping	1056	1040	1
Transport	414	408	1
Total Direct Employment	14108	14213	-1
Indirect Employment	2114	2116	-0
TOTAL	16,222	16,329	-1

2 EXPENDITURE

This is the final report for 2008, with comparisons with 2007

2.1 DIRECT Vs INDIRECT (£000's)

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		7,772	11,319	-31
Indirect Expenditure		2,679	4,278	-37
TOTAL		10,451	15,598	-33
Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		10,850	10,041	8
Indirect Expenditure		3,926	3,673	7
TOTAL		14,776	13,713	8
Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		20,668	17,020	21
Indirect Expenditure		7,376	6,054	22
TOTAL		28,044	23,074	22
Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		24,375	30,477	-20
Indirect Expenditure		8,642	10,735	-19
TOTAL		33,017	41,212	-20
Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		37,941	35,870	6
Indirect Expenditure		13,255	12,645	5
TOTAL		51,195	48,515	6
Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		41,567	40,014	4
Indirect Expenditure		14,739	14,167	4
TOTAL		56,305	54,181	4
Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		70,119	60,004	17
Indirect Expenditure		25,230	21,702	16
TOTAL		95,349	81,706	17

2.1 DIRECT Vs INDIRECT (£000's)

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		72,188	75,850	-5
Indirect Expenditure		26,037	27,307	-5
TOTAL		98,226	103,158	-5
Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		45,968	50,968	-10
Indirect Expenditure		16,700	18,438	-9
TOTAL		62,669	69,406	-10
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		27,096	28,121	-4
Indirect Expenditure		9,573	10,051	-5
TOTAL		36,668	38,172	-4
Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		11,546	11,631	-1
Indirect Expenditure		4,007	4,215	-5
TOTAL		15,554	15,846	-2
Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		14,014	11,495	22
Indirect Expenditure		5,173	4,183	24
TOTAL		19,187	15,678	22
Cumulative to December		<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		384,103	382,811	0
Indirect Expenditure		137,339	137,448	-0
TOTAL		521,442	520,259	0

2.2 ANALYSIS BY SECTOR OF EXPENDITURE (£000's)

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		2,108	3,048	-31
Food & Drink		1,919	2,825	-32
Recreation		585	935	-37
Shopping		1,115	1,612	-31
Transport		887	1,213	-27
Indirect Expenditure		2,679	4,278	-37
VAT		1,157	1,686	-31
TOTAL		10,451	15,598	-33

Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		3,250	2,955	10
Food & Drink		2,618	2,434	8
Recreation		818	771	6
Shopping		1,376	1,302	6
Transport		1,172	1,082	8
Indirect Expenditure		3,926	3,673	7
VAT		1,616	1,495	8
TOTAL		14,776	13,713	8

Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		5,459	4,371	25
Food & Drink		5,348	4,463	20
Recreation		1,760	1,489	18
Shopping		2,768	2,324	19
Transport		2,255	1,838	23
Indirect Expenditure		7,376	6,054	22
VAT		3,078	2,535	21
TOTAL		28,044	23,074	22

Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		5,831	6,994	-17
Food & Drink		6,499	8,249	-21
Recreation		2,168	2,782	-22
Shopping		3,487	4,432	-21
Transport		2,760	3,481	-21
Indirect Expenditure		8,642	10,735	-19
VAT		3,630	4,539	-20
TOTAL		33,017	41,212	-20

2.2 ANALYSIS BY SECTOR OF EXPENDITURE (£000's)

Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		8,770	8,855	-1
Food & Drink		10,322	9,530	8
Recreation		3,477	3,172	10
Shopping		5,405	4,961	9
Transport		4,316	4,011	8
Indirect Expenditure		13,255	12,645	5
VAT		5,651	5,342	6
TOTAL		51,195	48,515	6

Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		9,433	9,469	-0
Food & Drink		11,344	10,741	6
Recreation		3,858	3,604	7
Shopping		5,984	5,663	6
Transport		4,758	4,577	4
Indirect Expenditure		14,739	14,167	4
VAT		6,191	5,960	4
TOTAL		56,305	54,181	4

Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		23,170	21,391	8
Food & Drink		15,873	12,914	23
Recreation		5,453	4,340	26
Shopping		8,494	6,882	23
Transport		6,685	5,541	21
Indirect Expenditure		25,230	21,702	16
VAT		10,443	8,937	17
TOTAL		95,349	81,706	17

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		24,456	26,230	-7
Food & Drink		15,959	16,578	-4
Recreation		5,397	5,572	-3
Shopping		8,659	8,936	-3
Transport		6,966	7,237	-4
Indirect Expenditure		26,037	27,307	-5
VAT		10,751	11,297	-5
TOTAL		98,226	103,158	-5

2.2 ANALYSIS BY SECTOR OF EXPENDITURE (£000's)

Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		16,958	18,992	-11
Food & Drink		9,690	10,694	-9
Recreation		3,253	3,576	-9
Shopping		5,103	5,586	-9
Transport		4,118	4,529	-9
Indirect Expenditure		16,700	18,438	-9
VAT		6,846	7,591	-10
TOTAL		62,669	69,406	-10

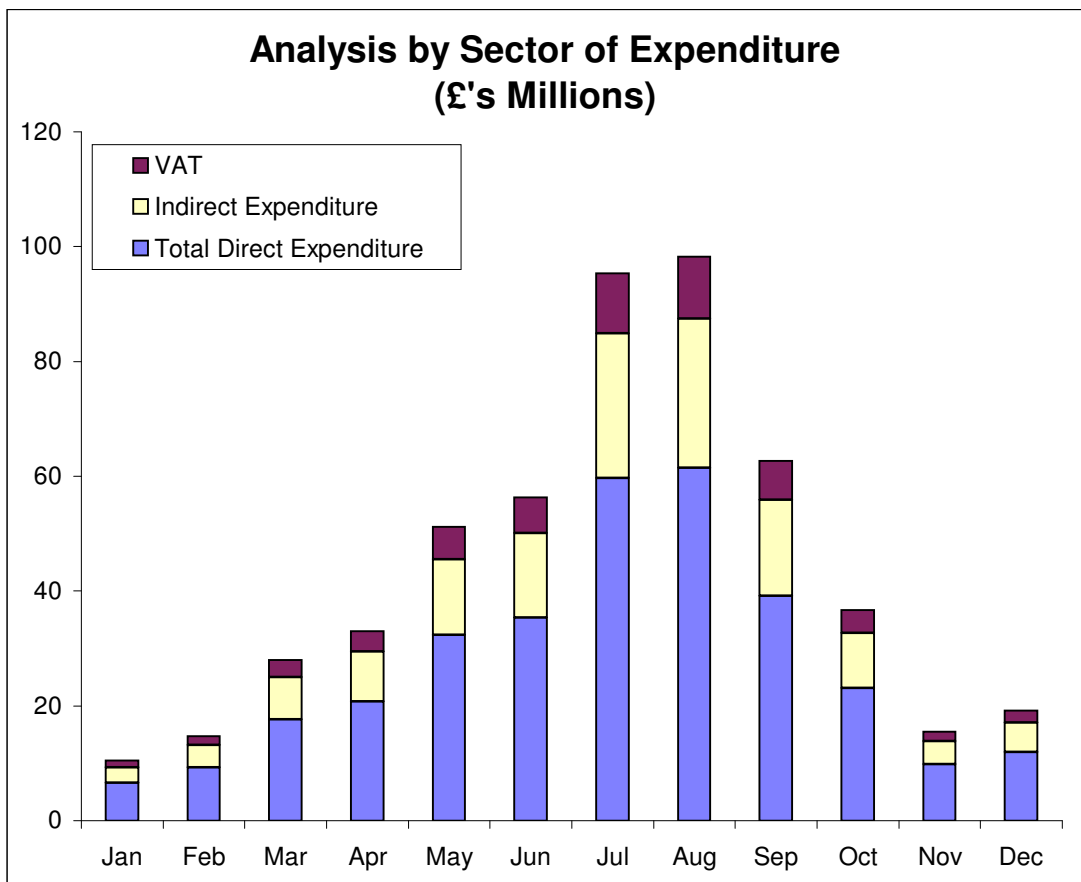
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		6,404	6,648	-4
Food & Drink		7,278	7,538	-3
Recreation		2,441	2,547	-4
Shopping		3,843	4,012	-4
Transport		3,094	3,189	-3
Indirect Expenditure		9,573	10,051	-5
VAT		4,036	4,188	-4
TOTAL		36,668	38,172	-4

Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		3,221	3,080	5
Food & Drink		2,907	2,972	-2
Recreation		918	982	-6
Shopping		1,508	1,596	-5
Transport		1,272	1,269	0
Indirect Expenditure		4,007	4,215	-5
VAT		1,720	1,732	-1
TOTAL		15,554	15,846	-2

Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		3,909	3,140	24
Food & Drink		3,500	2,877	22
Recreation		1,145	938	22
Shopping		1,893	1,605	18
Transport		1,479	1,223	21
Indirect Expenditure		5,173	4,183	24
VAT		2,087	1,712	22
TOTAL		19,187	15,678	22

2.2 ANALYSIS BY SECTOR OF EXPENDITURE (£000's)

Cumulative to December	2008	2007	% change
Accommodation	112,968	115,174	-2
Food & Drink	93,258	91,816	2
Recreation	31,272	30,706	2
Shopping	49,636	48,911	1
Transport	39,762	39,190	1
Indirect Expenditure	137,339	137,448	-0
VAT	57,207	57,014	0
TOTAL	521,442	520,259	0



2.3 ANALYSIS BY CATEGORY OF TOURISM (£000's)

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		3,174	2,709	17
Non-Serviced Accommodation		4,519	10,200	-56
SFR		1,879	1,866	1
Day Visitors		879	824	7
TOTAL		10,451	15,598	-33

Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		4,241	3,593	18
Non-Serviced Accommodation		8,119	7,863	3
SFR		631	627	1
Day Visitors		1,786	1,631	10
TOTAL		14,776	13,713	8

Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		6,254	4,715	33
Non-Serviced Accommodation		18,733	16,189	16
SFR		718	713	1
Day Visitors		2,339	1,458	60
TOTAL		28,044	23,074	22

Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		6,266	7,143	-12
Non-Serviced Accommodation		22,293	28,748	-22
SFR		1,713	1,702	1
Day Visitors		2,745	3,620	-24
TOTAL		33,017	41,212	-20

Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		9,453	9,943	-5
Non-Serviced Accommodation		36,234	33,232	9
SFR		1,102	1,095	1
Day Visitors		4,407	4,245	4
TOTAL		51,195	48,515	6

Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		9,070	9,981	-9
Non-Serviced Accommodation		41,041	37,501	9
SFR		849	843	1
Day Visitors		5,345	5,856	-9
TOTAL		56,305	54,181	4

2.3 ANALYSIS BY CATEGORY OF TOURISM (£000's)

Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		12,552	13,666	-8
Non-Serviced Accommodation		73,513	59,287	24
SFR		1,378	1,368	1
Day Visitors		7,908	7,385	7
TOTAL		95,349	81,706	17

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		14,855	16,894	-12
Non-Serviced Accommodation		70,927	73,476	-3
SFR		1,458	1,449	1
Day Visitors		10,985	11,339	-3
TOTAL		98,226	103,158	-5

Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		10,705	12,519	-14
Non-Serviced Accommodation		46,056	50,685	-9
SFR		751	746	1
Day Visitors		5,157	5,456	-5
TOTAL		62,669	69,406	-10

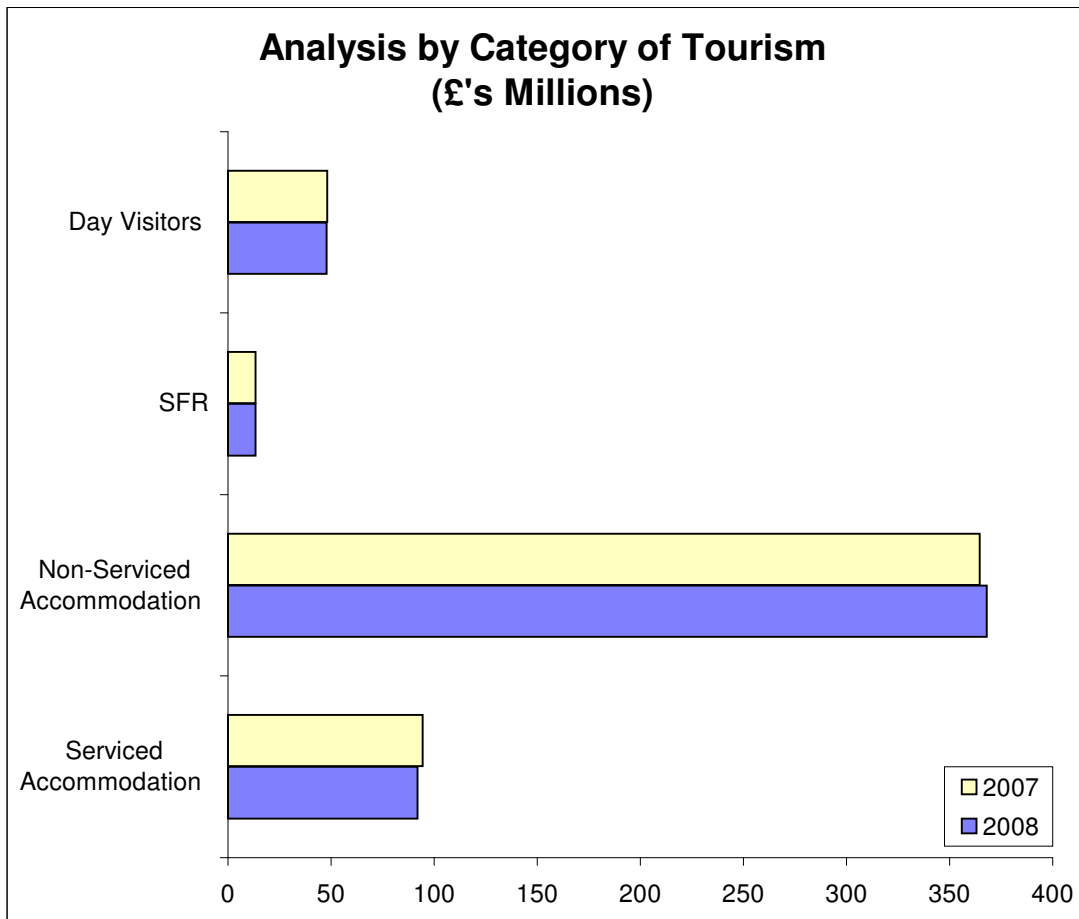
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		6,797	6,492	5
Non-Serviced Accommodation		25,346	27,045	-6
SFR		750	745	1
Day Visitors		3,775	3,889	-3
TOTAL		36,668	38,172	-4

Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		4,496	3,274	37
Non-Serviced Accommodation		8,786	10,433	-16
SFR		585	581	1
Day Visitors		1,687	1,558	8
TOTAL		15,554	15,846	-2

Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		4,049	3,366	20
Non-Serviced Accommodation		12,541	9,818	28
SFR		1,693	1,682	1
Day Visitors		903	812	11
TOTAL		19,187	15,678	22

2.3 ANALYSIS BY CATEGORY OF TOURISM (£000's)

Cumulative to December	2008	2007	% change
Serviced Accommodation	91,911	94,294	-3
Non-Serviced Accommodation	368,108	364,476	1
SFR	13,507	13,417	1
Day Visitors	47,916	48,073	-0
TOTAL	521,442	520,259	0



3 TOURIST DAYS AND NUMBERS

3.1 TOURIST DAYS (000's)

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		46.4	37.3	25
Non-Serviced Accommodation		130.0	288.5	-55
SFR		60.3	60.0	1
Day Visitors		34.3	32.2	7
TOTAL		271.0	417.9	-35

Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		62.0	50.9	22
Non-Serviced Accommodation		229.2	222.3	3
SFR		20.3	20.2	1
Day Visitors		69.6	63.7	9
TOTAL		381.1	357.0	7

Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		91.0	65.7	38
Non-Serviced Accommodation		573.9	504.0	14
SFR		23.0	22.9	1
Day Visitors		91.2	56.9	60
TOTAL		779.2	649.6	20

Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		91.3	101.4	-10
Non-Serviced Accommodation		699.1	908.7	-23
SFR		55.0	54.7	1
Day Visitors		107.0	141.3	-24
TOTAL		952.4	1,206.1	-21

Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		137.8	145.6	-5
Non-Serviced Accommodation		1,153.7	1,045.2	10
SFR		35.4	35.2	1
Day Visitors		171.8	165.8	4
TOTAL		1,498.6	1,391.7	8

Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		132.2	146.1	-10
Non-Serviced Accommodation		1,293.7	1,177.2	10
SFR		27.2	27.1	1
Day Visitors		208.4	228.6	-9
TOTAL		1,661.5	1,579.1	5

3.1 TOURIST DAYS (000's)

Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		154.2	168.7	-9
Non-Serviced Accommodation		1,820.5	1,402.2	30
SFR		44.2	44.0	1
Day Visitors		308.3	288.3	7
TOTAL		2,327.1	1,903.2	22

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		182.5	208.5	-12
Non-Serviced Accommodation		1,702.0	1,750.4	-3
SFR		46.8	46.6	1
Day Visitors		428.2	442.8	-3
TOTAL		2,359.5	2,448.2	-4

Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		131.5	154.3	-15
Non-Serviced Accommodation		1,066.2	1,174.1	-9
SFR		24.1	24.0	1
Day Visitors		201.0	213.0	-6
TOTAL		1,422.8	1,565.4	-9

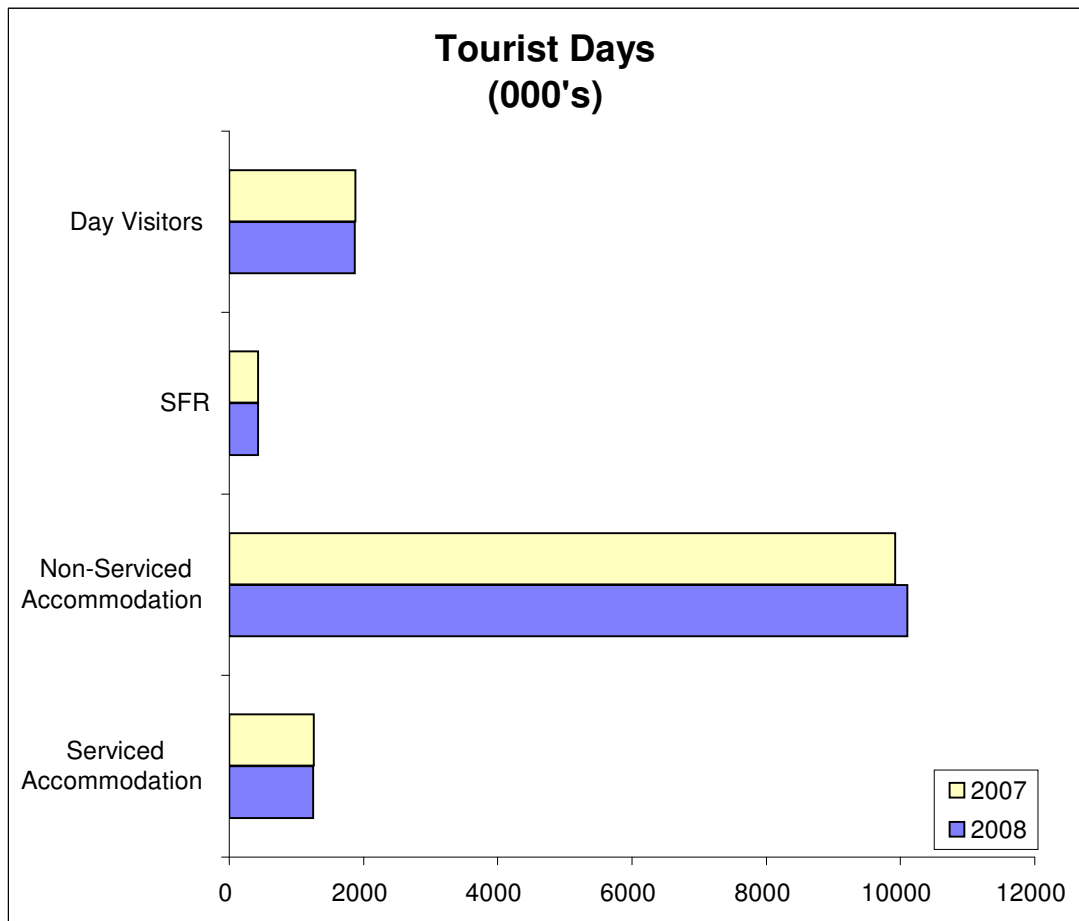
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		99.1	91.4	8
Non-Serviced Accommodation		798.6	846.8	-6
SFR		24.1	24.0	1
Day Visitors		147.1	151.9	-3
TOTAL		1,068.9	1,114.1	-4

Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		65.4	44.1	48
Non-Serviced Accommodation		270.4	316.6	-15
SFR		18.8	18.7	1
Day Visitors		65.8	60.8	8
TOTAL		420.2	440.2	-5

Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		58.8	45.0	31
Non-Serviced Accommodation		363.8	288.2	26
SFR		54.3	54.1	1
Day Visitors		35.2	31.7	11
TOTAL		512.1	419.0	22

3.1 TOURIST DAYS (000's)

Cumulative to December	2008	2007	% change
Serviced Accommodation	1,252.1	1,259.1	-1
Non-Serviced Accommodation	10,100.8	9,924.2	2
SFR	433.5	431.3	1
Day Visitors	1,867.9	1,877.0	-0
TOTAL	13,654.3	13,491.6	1



3.2 TOURIST NUMBERS (000's)

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		25.3	20.5	24
Non-Serviced Accommodation		38.2	84.9	-55
SFR		24.1	24.0	1
Day Visitors		34.3	32.2	7
TOTAL		121.9	161.5	-24

Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		35.5	29.0	22
Non-Serviced Accommodation		57.3	55.6	3
SFR		9.6	9.6	1
Day Visitors		69.6	63.7	9
TOTAL		172.0	157.9	9

Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		53.3	38.5	38
Non-Serviced Accommodation		119.6	105.0	14
SFR		10.7	10.7	1
Day Visitors		91.2	56.9	60
TOTAL		274.7	211.1	30

Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		48.7	54.1	-10
Non-Serviced Accommodation		109.2	142.0	-23
SFR		20.4	20.3	1
Day Visitors		107.0	141.3	-24
TOTAL		285.3	357.7	-20

Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		63.4	66.9	-5
Non-Serviced Accommodation		167.2	151.5	10
SFR		16.1	16.0	1
Day Visitors		171.8	165.8	4
TOTAL		418.4	400.1	5

Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		57.6	63.5	-9
Non-Serviced Accommodation		184.8	168.2	10
SFR		13.0	12.9	1
Day Visitors		208.4	228.6	-9
TOTAL		463.7	473.2	-2

3.2 TOURIST NUMBERS (000's)

Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		70.1	76.6	-8
Non-Serviced Accommodation		256.4	197.5	30
SFR		17.7	17.6	1
Day Visitors		308.3	288.3	7
TOTAL		652.5	580.0	12

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		75.7	86.4	-12
Non-Serviced Accommodation		223.9	230.3	-3
SFR		18.0	17.9	1
Day Visitors		428.2	442.8	-3
TOTAL		745.9	777.3	-4

Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		63.3	74.3	-15
Non-Serviced Accommodation		154.5	170.2	-9
SFR		11.1	11.1	1
Day Visitors		201.0	213.0	-6
TOTAL		430.0	468.6	-8

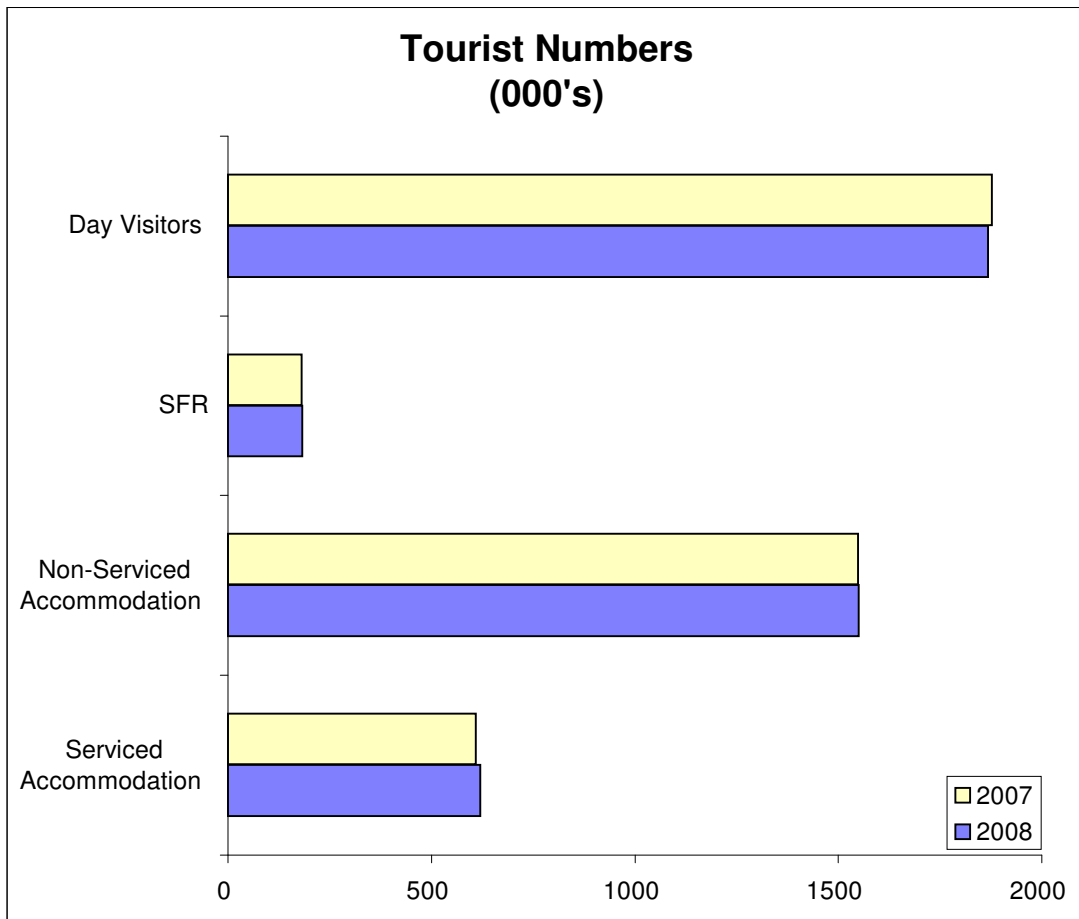
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		46.8	43.2	8
Non-Serviced Accommodation		114.1	121.0	-6
SFR		11.3	11.2	1
Day Visitors		147.1	151.9	-3
TOTAL		319.3	327.2	-2

Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		42.9	27.7	55
Non-Serviced Accommodation		60.1	70.4	-15
SFR		9.2	9.2	1
Day Visitors		65.8	60.8	8
TOTAL		177.9	168.1	6

Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		37.3	28.4	32
Non-Serviced Accommodation		65.0	51.5	26
SFR		20.9	20.8	1
Day Visitors		35.2	31.7	11
TOTAL		158.4	132.3	20

3.2 TOURIST NUMBERS (000's)

Cumulative to December	2008	2007	% change
Serviced Accommodation	619.8	609.0	2
Non-Serviced Accommodation	1,550.3	1,547.8	0
SFR	182.1	181.2	1
Day Visitors	1,867.9	1,877.0	-0
TOTAL	4,220.1	4,215.0	0



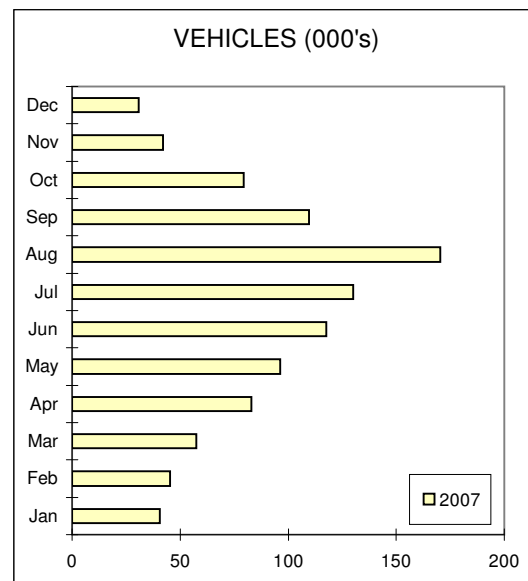
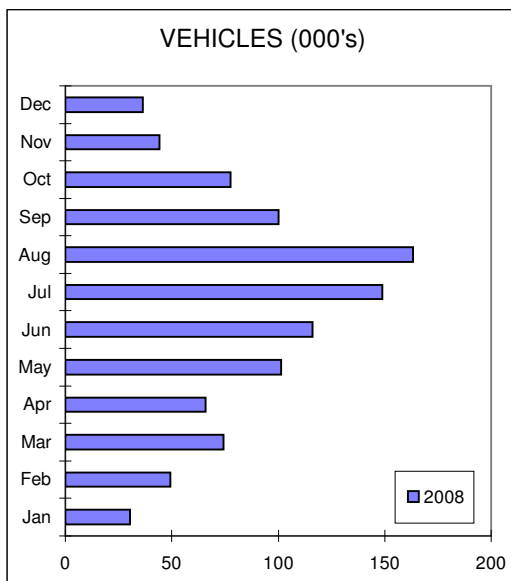
4 TOURIST TRAFFIC **2008** **2007** **% change**

The number of tourist cars on the roads of the District was (000's):

Jan	30.3	40.7	-25
Feb	49.3	45.3	9
Mar	74.4	57.6	29
Apr	65.9	83.1	-21
May	101.2	96.3	5
Jun	116.2	117.5	-1
Jul	148.7	129.9	14
Aug	163.4	170.3	-4
Sep	100.2	109.6	-9
Oct	77.5	79.5	-3
Nov	44.1	42.0	5
Dec	36.3	30.8	18
TOTAL	1,007.5	1,002.8	0

In terms of vehicle days, this was (000's):

VEHICLE DAYS (000's)	<u>2008</u>	<u>2007</u>	<u>% change</u>
Jan	70.1	108.2	-35
Feb	117.2	109.9	7
Mar	210.7	175.4	20
Apr	227.9	294.1	-22
May	389.6	358.4	9
Jun	435.7	410.3	6
Jul	570.0	452.6	26
Aug	552.9	572.6	-3
Sep	361.4	398.9	-9
Oct	265.1	276.1	-4
Nov	105.8	111.5	-5
Dec	113.3	94.5	20
TOTAL	3,419.8	3,362.6	2



Economic Impact	Expenditure and Revenue £'000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	7,772	10,850	20,668	24,375	37,941	41,567	70,119	72,188	45,968	27,096	11,546	14,014	384,103
Indirect Expenditure	2,679	3,926	7,376	8,642	13,255	14,739	25,230	26,037	16,700	9,573	4,007	5,173	137,339
Total	10,451	14,776	28,044	33,017	51,195	56,305	95,349	98,226	62,669	36,668	15,554	19,187	521,442

Economic Impact	Expenditure and Revenue £'000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	6,614	9,234	17,589	20,745	32,290	35,376	59,676	61,437	39,122	23,060	9,827	11,927	326,896
Indirect Expenditure	2,679	3,926	7,376	8,642	13,255	14,739	25,230	26,037	16,700	9,573	4,007	5,173	137,339
VAT	1,157	1,616	3,078	3,630	5,651	6,191	10,443	10,751	6,846	4,036	1,720	2,087	57,207
Total	10,451	14,776	28,044	33,017	51,195	56,305	95,349	98,226	62,669	36,668	15,554	19,187	521,442

Economic Impact	Categories giving rise to tourism expenditure												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	3,174	4,241	6,254	6,266	9,453	9,070	12,552	14,855	10,705	6,797	4,496	4,049	91,911
Non-Serviced Accommodation	4,519	8,119	18,733	22,293	36,234	41,041	73,513	70,927	46,056	25,346	8,786	12,541	368,108
SFR	1,879	631	718	1,713	1,102	849	1,378	1,458	751	750	585	1,693	13,507
Day Visitors	879	1,786	2,339	2,745	4,407	5,345	7,908	10,985	5,157	3,775	1,687	903	47,916
Total	10,451	14,776	28,044	33,017	51,195	56,305	95,349	98,226	62,669	36,668	15,554	19,187	521,442

Economic Impact	Sectors in which expenditure is made												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure													
Accommodation	2,108	3,250	5,459	5,831	8,770	9,433	23,170	24,456	16,958	6,404	3,221	3,909	112,968
Food & Drink	1,919	2,618	5,348	6,499	10,322	11,344	15,873	15,959	9,690	7,278	2,907	3,500	93,258
Recreation	585	818	1,760	2,168	3,477	3,858	5,453	5,397	3,253	2,441	918	1,145	31,272
Shopping	1,115	1,376	2,768	3,487	5,405	5,984	8,494	8,659	5,103	3,843	1,508	1,893	49,636
Transport	887	1,172	2,255	2,760	4,316	4,758	6,685	6,966	4,118	3,094	1,272	1,479	39,762
Total Direct Expenditure	6,614	9,234	17,589	20,745	32,290	35,376	59,676	61,437	39,122	23,060	9,827	11,927	326,896
VAT	1,157	1,616	3,078	3,630	5,651	6,191	10,443	10,751	6,846	4,036	1,720	2,087	57,207
Indirect Expenditure	2,679	3,926	7,376	8,642	13,255	14,739	25,230	26,037	16,700	9,573	4,007	5,173	137,339
Total	3,837	5,542	10,454	12,273	18,905	20,929	35,674	36,789	23,547	13,608	5,727	7,261	521,442

<u>Population</u>													Avg	
Total Population	117,900	117,900	117,900	117,900	117,900	117,900	117,900	117,900	117,900	117,900	117,900	117,900	117,900	117,900

<u>Employment</u>													FTE's
Supported by tourism activity in these Categories													
<u>Direct Employment</u>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2,828	2,972	3,280	3,369	3,588	3,563	3,662	3,791	3,557	3,381	3,077	2,967	3,336
Non-Serviced Accommodation	6,425	6,789	8,925	9,526	11,388	11,930	14,050	15,539	11,001	9,886	7,026	7,334	9,985
SFR	300	101	115	274	176	136	220	233	120	120	94	271	180
Day Visitors	134	271	355	417	670	812	1,202	1,669	784	574	256	137	607
Total Direct Employment	9,687	10,134	12,675	13,586	15,822	16,440	19,134	21,232	15,461	13,961	10,453	10,710	14,108
Indirect Employment	495	725	1,363	1,597	2,449	2,723	4,661	4,810	3,085	1,768	740	956	2,114
Total	10,182	10,859	14,037	15,183	18,270	19,163	23,795	26,042	18,546	15,729	11,194	11,665	16,222

<u>Employment</u>													FTE's
Sectors in which employment is supported													
<u>Direct Employment</u>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	8,556	8,625	9,591	9,795	9,831	9,831	9,833	11,848	9,825	9,726	8,783	8,673	9,576
Food & Drink	537	733	1,497	1,820	2,890	3,176	4,444	4,468	2,713	2,038	814	980	2,176
Recreation	199	278	598	737	1,181	1,311	1,853	1,834	1,105	829	312	389	885
Shopping	285	351	707	890	1,380	1,527	2,168	2,210	1,302	981	385	483	1,056
Transport	111	147	282	345	540	595	836	871	515	387	159	185	414
Total Direct Employment	9,687	10,134	12,675	13,586	15,822	16,440	19,134	21,232	15,461	13,961	10,453	10,710	14,108
Indirect Employment	495	725	1,363	1,597	2,449	2,723	4,661	4,810	3,085	1,768	740	956	2,114
Total	10,182	10,859	14,037	15,183	18,270	19,163	23,795	26,042	18,546	15,729	11,194	11,665	16,222

Tourists	Tourists 000's												
Tourist Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	46.4	62.0	91.0	91.3	137.8	132.2	154.2	182.5	131.5	99.1	65.4	58.8	1,252
Non-Serviced Accommodation	130.0	229.2	573.9	699.1	1,153.7	1,293.7	1,820.5	1,702.0	1,066.2	798.6	270.4	363.8	10,101
SFR	60.3	20.3	23.0	55.0	35.4	27.2	44.2	46.8	24.1	24.1	18.8	54.3	434
Day Visitors	34.3	69.6	91.2	107.0	171.8	208.4	308.3	428.2	201.0	147.1	65.8	35.2	1,868
Total Tourist Days 000's	271.0	381.1	779.2	952.4	1,498.6	1,661.5	2,327.1	2,359.5	1,422.8	1,068.9	420.2	512.1	13,654

Tourists	Tourists 000's												
Tourist Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	25.3	35.5	53.3	48.7	63.4	57.6	70.1	75.7	63.3	46.8	42.9	37.3	620
Non-Serviced Accommodation	38.2	57.3	119.6	109.2	167.2	184.8	256.4	223.9	154.5	114.1	60.1	65.0	1,550
SFR	24.1	9.6	10.7	20.4	16.1	13.0	17.7	18.0	11.1	11.3	9.2	20.9	182
Day Visitors	34.3	69.6	91.2	107.0	171.8	208.4	308.3	428.2	201.0	147.1	65.8	35.2	1,868
Total Tourist Numbers 000's	121.9	172.0	274.7	285.3	418.4	463.7	652.5	745.9	430.0	319.3	177.9	158.4	4,220

Vehicles	Vehicles 000's												
Vehicle Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	12.1	21.5	32.9	23.8	39.7	36.7	40.2	47.6	34.3	26.8	17.7	15.4	349
Non-Serviced Accommodation	33.4	74.0	150.4	166.7	305.5	343.9	455.8	406.8	280.2	198.0	67.7	74.8	2,557
SFR	17.9	6.0	6.8	16.3	10.5	8.1	13.1	13.9	7.2	7.1	5.6	16.1	129
Day Visitors	6.8	15.7	20.6	21.1	33.9	47.0	60.9	84.6	39.7	33.2	14.8	7.0	385
Total Vehicle Days 000's	70.1	117.2	210.7	227.9	389.6	435.7	570.0	552.9	361.4	265.1	105.8	113.3	3,420

Vehicles	Vehicles 000's												
Vehicle Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	6.6	12.3	19.3	12.7	18.3	16.2	18.4	19.9	16.5	12.6	11.5	9.7	174
Non-Serviced Accommodation	9.8	18.5	31.3	26.0	44.3	49.1	64.2	53.5	40.6	28.3	15.1	13.4	394
SFR	7.2	2.9	3.2	6.0	4.8	3.8	5.2	5.3	3.3	3.3	2.7	6.2	54
Day Visitors	6.8	15.7	20.6	21.1	33.9	47.0	60.9	84.6	39.7	33.2	14.8	7.0	385
Total Vehicle Numbers 000's	30.3	49.3	74.4	65.9	101.2	116.2	148.7	163.4	100.2	77.5	44.1	36.3	1,007

BED STOCK (number of beds)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	MAX
Serviced Accommodation	8,407	8,800	9,510	9,724	9,739	9,739	9,739	9,739	9,735	9,672	9,127	8,828	9,739
Non-Serviced Accommodation	27,849	26,848	62,018	68,531	69,398	69,398	69,413	69,413	69,366	65,719	36,323	32,103	69,413
Total BED STOCK (number of beds)	36,256	35,648	71,528	78,255	79,137	79,137	79,152	79,152	79,101	75,391	45,450	40,931	79,152

Economic Impact	Expenditure and Revenue £'000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	10,877	9,648	16,354	29,285	34,467	38,449	57,658	72,884	48,975	27,021	11,177	11,046	367,840
Indirect Expenditure	4,111	3,529	5,818	10,315	12,151	13,613	20,853	26,239	17,717	9,658	4,050	4,019	132,073
Total	14,988	13,177	22,172	39,601	46,618	52,062	78,511	99,123	66,692	36,679	15,227	15,065	499,913

Economic Impact	Expenditure and Revenue £'000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	9,257	8,211	13,919	24,924	29,333	32,723	49,070	62,029	41,681	22,997	9,512	9,400	313,055
Indirect Expenditure	4,111	3,529	5,818	10,315	12,151	13,613	20,853	26,239	17,717	9,658	4,050	4,019	132,073
VAT	1,620	1,437	2,436	4,362	5,133	5,726	8,587	10,855	7,294	4,024	1,665	1,645	54,785
Total	14,988	13,177	22,172	39,601	46,618	52,062	78,511	99,123	66,692	36,679	15,227	15,065	499,913

Economic Impact	Categories giving rise to tourism expenditure												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2,603	3,452	4,530	6,863	9,554	9,591	13,132	16,233	12,030	6,238	3,146	3,234	90,606
Non-Serviced Accommodation	9,801	7,555	15,556	27,624	31,932	36,034	56,968	70,603	48,703	25,988	10,025	9,434	350,222
SFR	1,793	602	685	1,635	1,052	810	1,315	1,392	717	716	558	1,616	12,892
Day Visitors	791	1,567	1,401	3,478	4,079	5,627	7,096	10,896	5,242	3,737	1,497	781	46,193
Total	14,988	13,177	22,172	39,601	46,618	52,062	78,511	99,123	66,692	36,679	15,227	15,065	499,913

Economic Impact	Sectors in which expenditure is made												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure													
Accommodation	2,929	2,840	4,200	6,720	8,508	9,099	20,554	25,205	18,250	6,388	2,960	3,017	110,669
Food & Drink	2,715	2,339	4,289	7,927	9,157	10,321	12,409	15,930	10,276	7,243	2,856	2,764	88,225
Recreation	898	741	1,430	2,673	3,048	3,463	4,170	5,354	3,436	2,447	943	902	29,506
Shopping	1,549	1,251	2,233	4,259	4,767	5,442	6,612	8,587	5,367	3,855	1,533	1,542	46,998
Transport	1,165	1,040	1,766	3,345	3,854	4,398	5,324	6,954	4,351	3,064	1,220	1,175	37,657
Total Direct Expenditure	9,257	8,211	13,919	24,924	29,333	32,723	49,070	62,029	41,681	22,997	9,512	9,400	313,055
VAT	1,620	1,437	2,436	4,362	5,133	5,726	8,587	10,855	7,294	4,024	1,665	1,645	54,785
Indirect Expenditure	4,111	3,529	5,818	10,315	12,151	13,613	20,853	26,239	17,717	9,658	4,050	4,019	132,073
Total	5,731	4,966	8,253	14,677	17,284	19,340	29,440	37,095	25,011	13,682	5,715	5,664	499,913

Population													Avg
Total Population	117,300	117,300	117,300	117,300	117,300	117,300	117,300	117,300	117,300	117,300	117,300	117,300	117,300

Employment Supported by tourism activity in these Categories													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2,793	2,926	3,172	3,421	3,621	3,623	3,725	3,907	3,658	3,355	2,990	2,915	3,342
Non-Serviced Accommodation	7,011	6,763	8,662	10,373	10,904	11,433	12,306	17,819	11,420	10,059	7,196	7,052	10,083
SFR	298	100	114	272	175	135	219	232	119	119	93	269	179
Day Visitors	125	248	222	550	645	890	1,122	1,723	829	591	237	123	609
Total Direct Employment	10,227	10,037	12,169	14,616	15,344	16,081	17,373	23,680	16,026	14,124	10,515	10,359	14,213
Indirect Employment	790	678	1,118	1,983	2,336	2,617	4,009	5,045	3,406	1,857	779	773	2,116
Total	11,018	10,715	13,288	16,599	17,680	18,698	21,382	28,725	19,433	15,981	11,294	11,132	16,329

Employment Sectors in which employment is supported													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	8,556	8,625	9,591	9,795	9,831	9,831	9,833	13,960	9,825	9,726	8,783	8,673	9,752
Food & Drink	791	681	1,250	2,310	2,668	3,007	3,616	4,641	2,994	2,110	832	805	2,142
Recreation	318	262	506	945	1,078	1,225	1,474	1,893	1,215	865	333	319	869
Shopping	411	332	593	1,131	1,266	1,445	1,756	2,281	1,426	1,024	407	410	1,040
Transport	152	135	230	435	502	573	693	905	566	399	159	153	408
Total Direct Employment	10,227	10,037	12,169	14,616	15,344	16,081	17,373	23,680	16,026	14,124	10,515	10,359	14,213
Indirect Employment	790	678	1,118	1,983	2,336	2,617	4,009	5,045	3,406	1,857	779	773	2,116
Total	11,018	10,715	13,288	16,599	17,680	18,698	21,382	28,725	19,433	15,981	11,294	11,132	16,329

Tourists	Tourists 000's												
Tourist Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	37.3	50.9	65.7	101.4	145.6	146.1	168.7	208.5	154.3	91.4	44.1	45.0	1,259
Non-Serviced Accommodation	288.5	222.3	504.0	908.7	1,045.2	1,177.2	1,402.2	1,750.4	1,174.1	846.8	316.6	288.2	9,924
SFR	60.0	20.2	22.9	54.7	35.2	27.1	44.0	46.6	24.0	24.0	18.7	54.1	431
Day Visitors	32.2	63.7	56.9	141.3	165.8	228.6	288.3	442.8	213.0	151.9	60.8	31.7	1,877
Total Tourist Days 000's	417.9	357.0	649.6	1,206.1	1,391.7	1,579.1	1,903.2	2,448.2	1,565.4	1,114.1	440.2	419.0	13,492

Tourists	Tourists 000's												
Tourist Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	20.5	29.0	38.5	54.1	66.9	63.5	76.6	86.4	74.3	43.2	27.7	28.4	609
Non-Serviced Accommodation	84.9	55.6	105.0	142.0	151.5	168.2	197.5	230.3	170.2	121.0	70.4	51.5	1,548
SFR	24.0	9.6	10.7	20.3	16.0	12.9	17.6	17.9	11.1	11.2	9.2	20.8	181
Day Visitors	32.2	63.7	56.9	141.3	165.8	228.6	288.3	442.8	213.0	151.9	60.8	31.7	1,877
Total Tourist Numbers 000's	161.5	157.9	211.1	357.7	400.1	473.2	580.0	777.3	468.6	327.2	168.1	132.3	4,215

Vehicles	Vehicles 000's												
Vehicle Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	9.8	17.8	24.2	26.8	41.9	40.5	43.9	54.3	40.2	25.3	12.6	12.2	350
Non-Serviced Accommodation	74.2	71.7	131.6	223.1	273.3	310.1	338.7	417.0	309.5	209.4	79.6	59.9	2,498
SFR	17.8	6.0	6.8	16.2	10.4	8.0	13.0	13.8	7.1	7.1	5.5	16.0	128
Day Visitors	6.4	14.4	12.8	27.9	32.7	51.6	56.9	87.4	42.1	34.3	13.7	6.3	387
Total Vehicle Days 000's	108.2	109.9	175.4	294.1	358.4	410.3	452.6	572.6	398.9	276.1	111.5	94.5	3,363

Vehicles	Vehicles 000's												
Vehicle Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	5.4	10.2	14.2	14.3	19.3	17.8	20.1	22.7	19.4	12.0	7.8	7.7	171
Non-Serviced Accommodation	21.8	17.9	27.4	34.9	39.6	44.3	47.7	54.9	44.9	29.9	17.7	10.7	392
SFR	7.1	2.8	3.2	6.0	4.7	3.8	5.2	5.3	3.3	3.3	2.7	6.2	54
Day Visitors	6.4	14.4	12.8	27.9	32.7	51.6	56.9	87.4	42.1	34.3	13.7	6.3	387
Total Vehicle Numbers 000's	40.7	45.3	57.6	83.1	96.3	117.5	129.9	170.3	109.6	79.5	42.0	30.8	1,003

BED STOCK (number of beds)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	MAX
Serviced Accommodation	8,407	8,800	9,510	9,724	9,739	9,739	9,739	9,739	9,735	9,672	9,127	8,828	9,739
Non-Serviced Accommodation	27,849	26,848	62,018	68,531	69,398	69,398	69,413	69,413	69,366	65,719	36,323	32,103	69,413
Total BED STOCK (number of beds)	36,256	35,648	71,528	78,255	79,137	79,137	79,152	79,152	79,101	75,391	45,450	40,931	79,152

GLOSSARY OF TERMS

Average direct daily expenditure	derived from total direct revenue divided by the total number of visitor days
Average revenue per head	derived from total revenue divided by the total number of visitors
Bed stock	number of bed spaces
Category of expenditure	denotes areas of economic impact generated by: Accommodation, Food & Drink, Recreation, Shopping and Transport
Category of visitor	visitors are categorised according to type of accommodation used (+50 Room Hotels, 11-50 Room Hotels, <10 Room Hotels; Self-Catering, Touring/Camping) or as 'Day Visitors' or 'SFRs'
Commercial accommodation	denotes +50 Room Hotels, 11-50 Room Hotels, <10 Room Hotels, Guest Houses/B&Bs, Self-Catering, and Touring/Camping
Day visitors:	
- Tourist day visits	tourist day visits are defined as visits commencing from a home location for a non-routine purpose, for a duration of not less than 3 hours outside the normal habitat of the visitor. For STEAM purposes, day visits emanating from outside of the reporting area commencing from a location other than their permanent residence are also measured
- Intra-district tourist day visits	in addition to tourist day visits, as defined for STEAM purposes, intra-district day visits are those by persons residing within a district making day visits within that district
- Leisure day visits	in addition to tourist day visits, as defined for STEAM purposes, a leisure day visit is a trip taken from a person's home and not taken whilst staying away from home. Trips must be round trips taken from a person's home within the same day without spending a night away from home. The usual convention is that there is no minimum stay requirement; however, for the purposes of this report, a minimum stay of 3 hours is required
Direct revenue	denotes visitor expenditure within a zone or Borough area

Expenditure	denotes expenditure on direct items (Accommodation, Food & Drink, Recreation, Shopping and Transport) and indirect items
FTE	denotes full-time equivalent jobs
GTS (UK) Ltd	Global Tourism Solutions (UK) Ltd
High season	from April through to October
Indirect revenue	denotes secondary expenditure within a zone or Borough area. Measured in STEAM through the application of proxy variable multipliers derived from the Scottish Tourism Multiplier Study (1992)
Low season	from November through to March
Non-commercial accommodation	denotes resident households used as accommodation by SFR
Non-serviced accommodation	denotes Self-Catering, and Touring/ Camping
Peak month	the month where the majority of the Borough's volume, value or bed space availability occurs
Revenue	denotes income derived from expenditure
STEAM	Scarborough Tourism Economic Activity Monitor
Serviced accommodation	denotes +50 Room Hotels, 11-50 Room Hotels, <10 Room Hotels, and Guest Houses/B&Bs
Touring/Camping	Touring Caravans and Camping
Tourist	denotes someone staying overnight
SFR	Staying with Friends and Relatives
Visitor	denotes the aggregate of tourists, Day Visitors and SFR
Visitor activity	denotes visitor numbers and/or visitor days (i.e. visitor volume)
Visitor days	denotes the total number of visitors multiplied by the average length of stay
Visitor numbers	denotes the total number of visitors (Tourists, Day Visitors and SFR)
Zone	denotes sub-Borough area as defined by the Borough representatives

ECONOMIC EFFECTS

[Source: “A Guidance Pack from the Department for Culture, Media & Sport” 1998]

1. Indicators of the economic effects of tourism activity in the local area are likely to include estimates of local income, jobs and business linkages. The direct measurement of tourism activity, especially of tourism expenditure, presents only a partial picture of the economic impact of the tourism activity in an area:
 - The gross *direct* economic impact of tourism is the total value of tourism spending in the area. This covers the 'front-line' effects, looking at tourism spending in hotels, restaurants, shops, taxis, i.e. any business that receives visitor expenditure directly. The net direct impact, however, needs to take into account the value of goods and services that are imported into the area in order to supply the tourist with goods and services.
 - *indirect* effects arise from the generation of economic activity by subsequent rounds of expenditure (e.g. as hotels purchase food and drinks from local suppliers and use the services of local laundries, builders, banks, utility companies, etc.) Not all these effects will arise in the local area since some such expenditure will go to suppliers elsewhere in the region or nationally.
 - *induced* effects arise from the spending of income accruing to local residents from wages and profits during the direct and indirect rounds.
 - *leakages* of expenditure out of the local economy: such as savings and taxation, as well as the costs of imports of goods and services from outside the area already mentioned above.
 - *opportunity costs*: to take into account the cost of using scarce resources for tourism as opposed to alternative uses, as, for example, spending on the provision of tourist information centres, car parking and other facilities used by visitors. When tourism substitutes one form of expenditure and economic activity for another, this is known as the displacement effect.
 - *investment activity* arising from capital investment in new facilities for visitors by private or public sectors (which also involve some consideration of opportunity cost.)
2. These are complex issues. There is guidance from HM Treasury on economic impact assessments. Employment effects are similarly difficult to measure precisely, but one simple approach is to track employment in 'tourism related industries'.
3. In conclusion, there is a frequently occurring temptation to attribute over-precision to the ability to measure indirect effects. Wherever appropriate and possible, STEAM reports separate direct and indirect estimates.

EMPLOYMENT

STEAM, both as a model and a process, takes advantage of various sources of information both to drive the model and benchmark the outputs. Such sources of information include:

- Some sub-regional estimates of numbers employed in tourism-related industries are available from NOMIS (National Online Manpower Information System) at the University of Durham. Some data are available quarterly from NOMIS, which allows the marked seasonal patterns in tourism employment to be taken into account.
- Local business surveys which give average numbers of core staff per type and size of establishment. Employment can be estimated by applying these averages to the local stock data.
- STEAM makes adjustments to the core staff in accordance with occupancy percentages above certain thresholds. This takes account of the times when temporary or part-time staff will be required.
- Employment resulting from tourist expenditure upon food and drink, recreation and leisure, shopping and transport, is more the stuff of 'multipliers' than direct estimation.
- The Office for National Statistics (ONS) publishes quarterly statistics covering employment in the following tourism related industries. (These are used to provide the official estimates for employment in the tourism related industries.)

Standard Industrial Classification (1992) Class

55.1 Hotels

55.2 Camping sites and other provision of short stay accommodation

55.3 Restaurants

55.4 Bars, public houses and nightclubs

63.3 Travel agencies and tour operators

92.5 Library, archives, museums and other cultural activities

92.6 Sporting activities

92.7 Other recreational activities

(Note that some of these categories are combined in the ONS tables but the data may be available from NOMIS)

DAY VISITORS AND THEIR IMPACTS IN STEAM

Defining Tourist Day Visits

STEAM defines a tourist day visit as one which crosses a boundary from one area into another area, for a period of at least three hours for non-routine leisure purposes.

The Source of Tourist Day Visitor Estimates

- STEAM uses as its baseline, elements of research undertaken by CURDS¹ (Centre for Urban and Regional Development Studies) and the TORG (Transport Operations Research Group) as the start point for calculation of local authority tourism day visitor volume estimates.
- The CURDS / TORG report was commissioned by the Departments of Employment and National Heritage and the method used in the research became established as the method of estimating the number of leisure day visits to each English local authority district. This was for the purpose of calculating the related element local government Standard Spending Assessment.
- These *leisure day visits* are defined as non-routine trips undertaken (away from home, but not involving an overnight stay) for one of four broad leisure purposes:
 - Outdoor activities
 - Visiting primary attractions (inc. shopping, eating out, sport, theatre)
 - Visiting scarce attractions (inc. sightseeing, shows, museums, zoos)
 - Visiting friends and relatives
- The research splits these into *intra* (source and destination of visitor within the district) and *other* (source of visitor from outside the district)
- Both *intra* and *other* trips are longer than 3 hours duration and are for “leisure purposes” as defined in the 1988/89 Leisure Day Visit Survey.
- STEAM uses the *other* data by district as the source data for the baseline day visitor estimates, thus excluding trips made by visitors originating from within the destination district.

Seasonality and Trends in Day Visitor Volume

- The baseline day visitor figure is further affected by a set of statistics to vary it from year to year and to spread the annual figure across the months, as required in the STEAM modelling process.
- The process of spreading the annual figure across the months utilises Tourist Information Centre visitor numbers and Visitor Attractions data. To be suitable for the task, these statistics must be:
 - available for the full 12 months of the year, and
 - be consistently measured for at least two years
- The process of identifying the change in tourist numbers from year to year (on a month-on-month basis) again utilises Tourist Information Centre visitor numbers and visitor numbers to attractions - these statistics are checked for consistency before use. Both monthly and annual estimates of visitor numbers can be utilised in the model.

Expenditure by Tourist Day Visitors

STEAM uses visitor expenditure data from visitor surveys to assist in the calculation of expenditure by all types of visitor. In the vast majority of cases this derives from survey work undertaken by Taylor Nelson Sofres (TNS) in England, Scotland and Wales on behalf of national agencies and other partners, including Global Tourism Solutions (UK) Ltd (GTS).

¹ Both at the University of Newcastle upon Tyne

As new sources of expenditure data become available, GTS re-assesses the expenditure assumptions in the Model, and where appropriate, updates these assumptions based on new data (where it is sufficiently robust). In this way, the expenditure data used to produce this report replaces previously available TNS survey data from Scotland. Where new survey data shows significant changes in Rates of Daily Expenditure (RatODEs), GTS, with its clients, assesses the need to update previous economic impact estimates, to ensure consistency across an established trend period.

The STEAM Model applies Rates of Daily Expenditure based on visitor expenditure on:

- Food and Drink
- Recreation
- Shopping
- Transport

Additionally, for *staying visitors*, expenditure on tourist accommodation is estimated using accommodation capacity information (bed stock), accommodation tariffs and performance data (occupancy).

The baseline expenditure data is updated annually to reflect the impact of inflation, using the Retail Price Index (RPI)

STATISTICAL CONFIDENCE LEVELS IN STEAM

STEAM is a model, so any level of confidence in the results depends on the sampling errors in the data inputs. So how do we test STEAM?

- Quality control to ensure there are no data entry errors and that data inputs are *fit for purpose*
- Critical to all models is: ‘Do random shocks² destabilise them or do they converge?’ We have evaluated STEAM for convergence and shown that it does so quite easily. Thus the *Law of Large Numbers* holds, in that any disturbances amongst the component parts are smoothed out when it comes to aggregation, so any outliers in the input data do not have a disproportionate impact on the overall results.
- On behalf of GTS (UK) Ltd, Professor Stephen Wanhill has tested the aggregate data from 2000-2004 in the model by devising *Pseudo Sampling Errors* and by examining in detail the outputs for all of Wales (selected for this exercise on the basis of size and length of trend series). At Fisher’s 95% Confidence Level this gave us +/- 5.06% for expenditure, +/- 3.01% for employment and +/- 3.56% for tourist days, based on our estimate of the percentage of coverage of the known accommodation stock and day visits in Wales as a whole.

Should more stringent confidence levels be applied (99.9% for example), the sampling error remains low, being +/- 8.49% for expenditure, +/- 5.05% for employment and +/- 5.97% for tourist days, again based on our estimate of the percentage of coverage of the known accommodation stock and day visits in Wales as a whole for the period 2000 to 2004.

Sir Ronald Fisher³ devised these standard statistical confidence tests for quality control purposes in the 1920s. The choice of 95% confidence level to test statistical results has subsequently become an accepted standard practice. It means that we can be 95% confident that the true result lies within the boundaries +/- given.

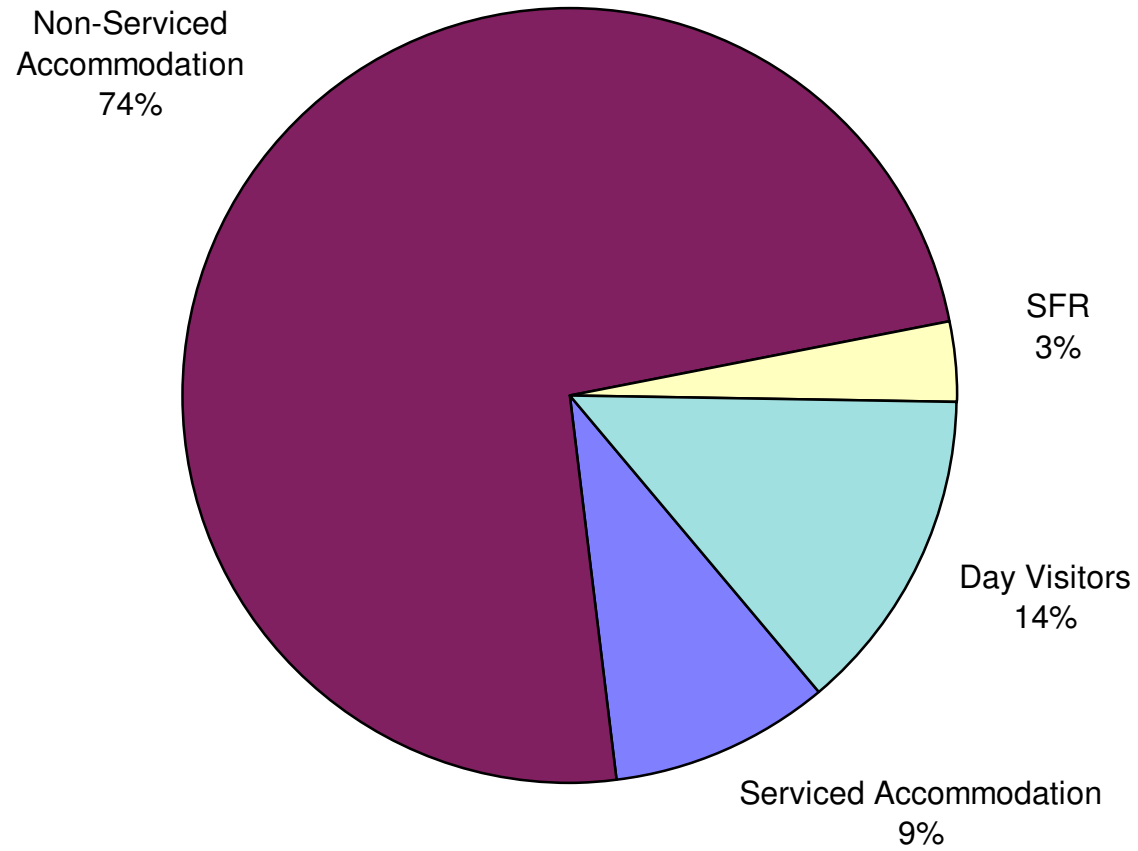
By way of comparison, the 95% confidence level sampling errors in the 2004 International Passenger Survey were +/- 3.1% for expenditure, +/- 3.0% for tourist numbers and +/- 4.6% for tourist nights. This is at a UK level – at infra-national and regional levels these errors would be higher.

We are satisfied that STEAM offers reliable and robust outputs which our clients can place their confidence in, year on year.

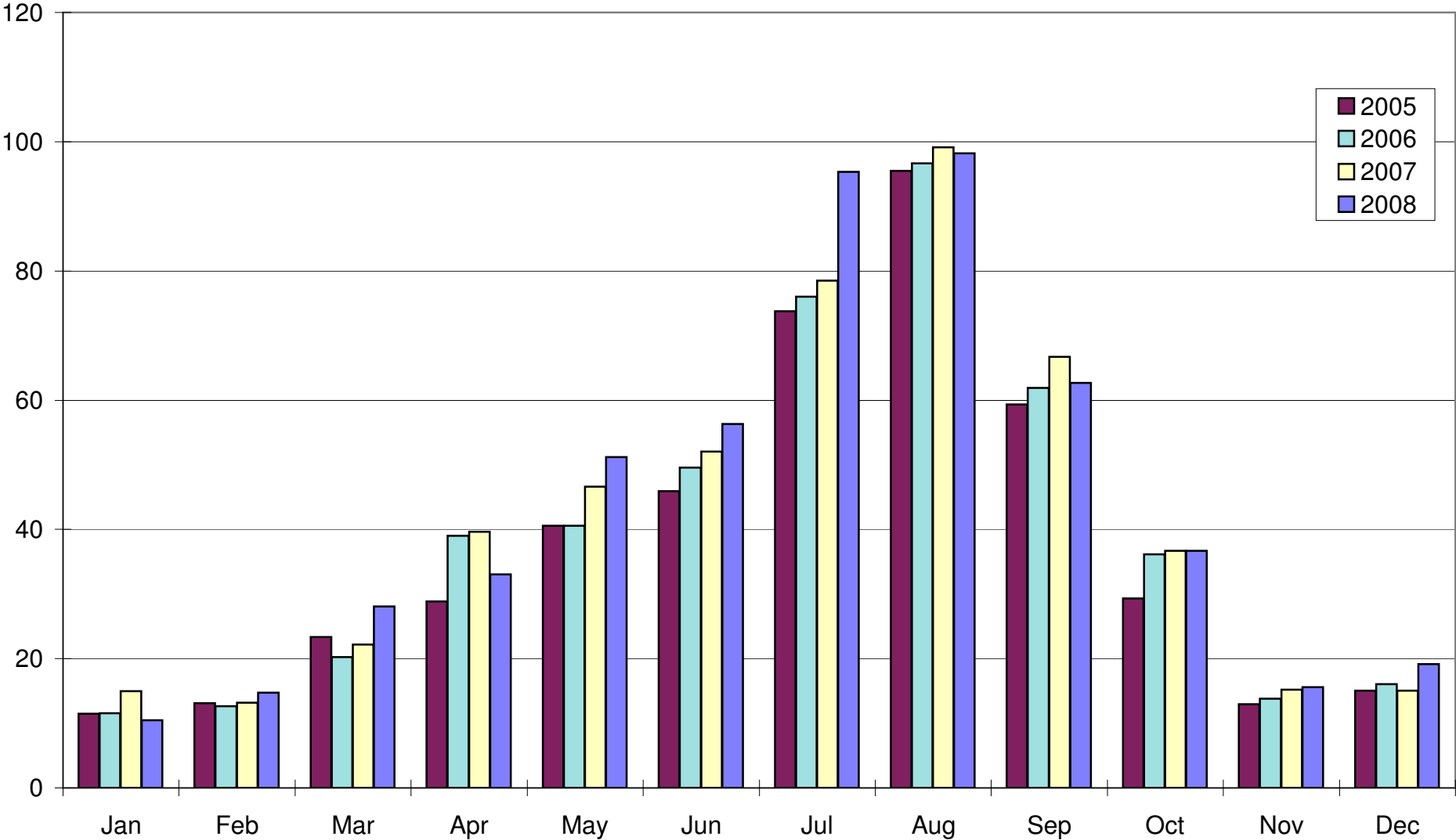
² Caused by unusual or eccentric events

³ Sir Ronald Aylmer Fisher (1890 – 1967)

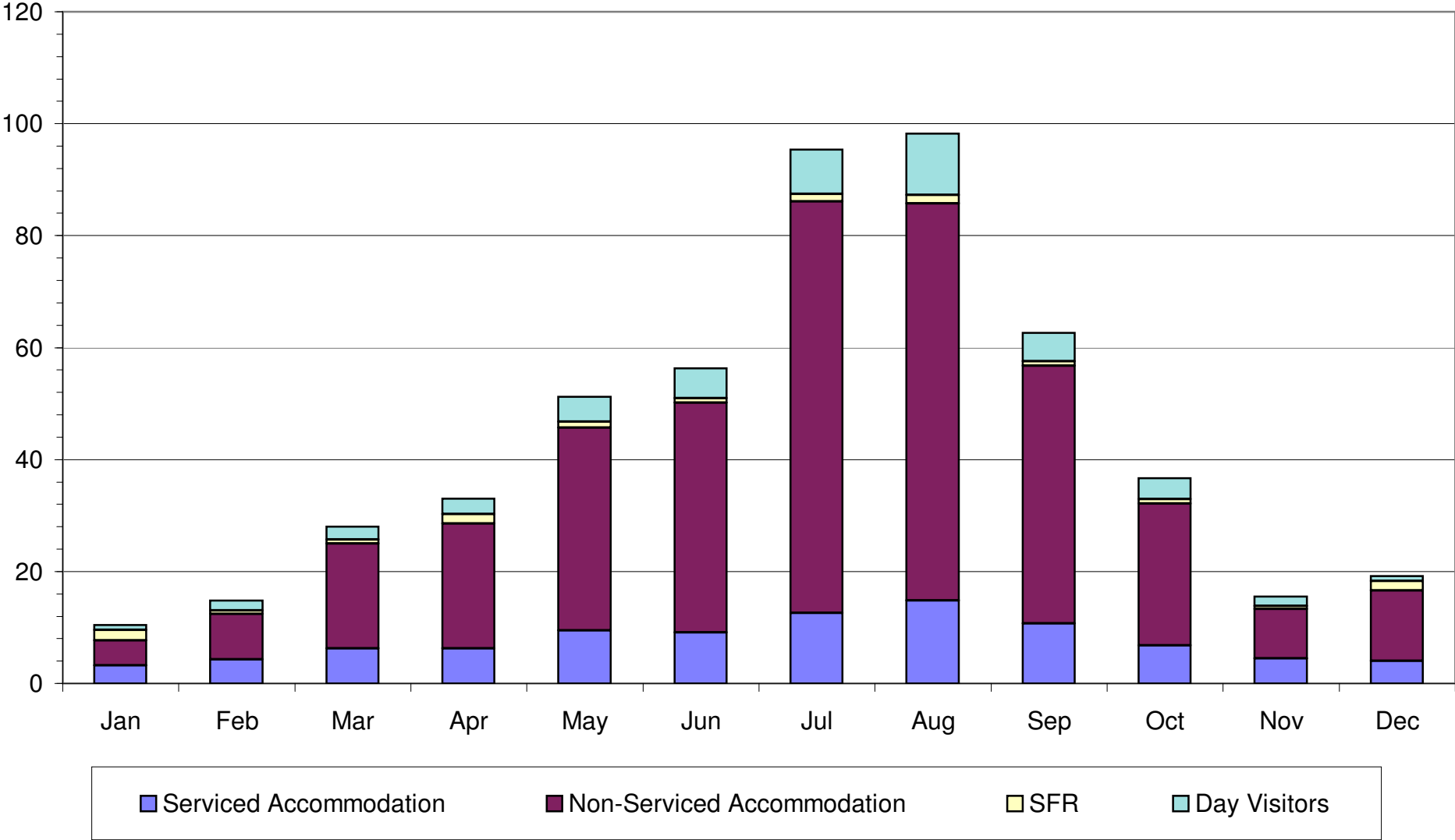
13.7 MILLION TOURIST DAYS : 2008 : BY TYPE OF TOURIST



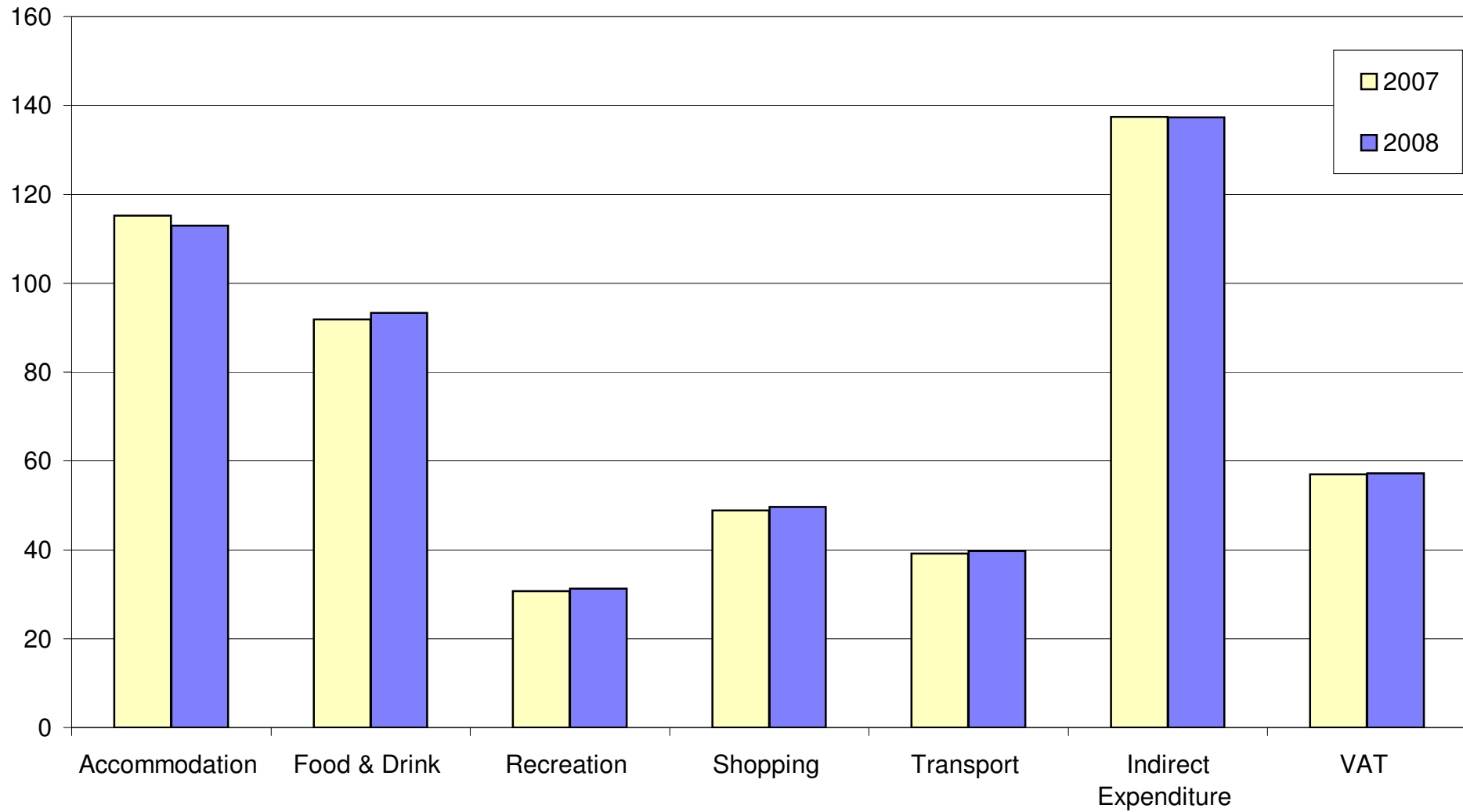
TOURISM EXPENDITURE 2005-2008: BY MONTH (£M's)



TOURISM EXPENDITURE 2008 : BY TYPE OF TOURIST : BY MONTH (£M's)



**TOURISM EXPENDITURE : BY INDUSTRY SECTOR
2008 COMPARED WITH 2007 (£M's)**



ANNUAL TOURISM EXPENDITURE (£M's)

