

**PEMBROKESHIRE
COUNTY COUNCIL**

STEAM REPORT 2011

PEMBROKESHIRE COUNTY COUNCIL

STEAM REPORT 2011

CONTENTS

OVERVIEW OF STEAM	Pages 1-6
NUMERIC EXECUTIVE SUMMARY	Page 7
SECTOR ANALYSIS	Page 8
ACCOMMODATION SUPPLY ANALYSIS	Page 9
TOURISM IMPACTS MONITOR	Page 10-12
2006 – 2011 TREND SUMMARY	Pages 13-15
 APPENDICES:	
Appendix 1 2011	
Economic Impact (£'s 2011 actual)	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 2010	
Economic Impact (£'s 2010 actual)	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 2011: By Type of Tourist: By Month

Chart 3

Tourism Expenditure: By Industry Sector: 2010 & 2011

Chart 4

Annual Tourism Expenditure 2008-2011

Chart 5



OVERVIEW OF STEAM

I. 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
Grove House
9D Throxenby Lane
Scarborough
North Yorkshire
YO12 5HN

Tel: 01723 506310

Email: gtsuk.djj@btconnect.com

PEMBROKESHIRE COUNTY COUNCIL

STEAM Report 2011

Numeric Executive Summary

All £'s 2011 indexed
(RPI Factor 10/11 +1.0509)

Issued 12 July 2012

Analysis by Sector of Expenditure (£'s millions)	2011	2010	% change
Accommodation	115.97	122.74	-6
Food & Drink	101.27	102.29	-1
Recreation	34.42	34.53	-0
Shopping	54.46	54.67	-0
Transport	43.08	43.51	-1
Total Direct Revenue	349.20	357.74	-2
Indirect Expenditure	150.90	151.34	-0
VAT	69.84	62.60	12
TOTAL	569.94	571.68	-0

Revenue by Category of Visitor (£'s millions)	2011	2010	% change
Serviced Accommodation	85.40	92.77	-8
Non-Serviced Accommodation	416.50	412.34	1
SFR	14.62	14.66	-0
Day Visitors	53.42	51.93	3
TOTAL	569.94	571.68	-0

Tourist Days (Thousands)	2011	2010	% change
Serviced Accommodation	1,057.9	1,156.8	-9
Non-Serviced Accommodation	10,581.6	10,347.1	2
SFR	430.6	431.7	-0
Day Visitors	1,911.1	1,857.7	3
TOTAL	13,981.1	13,793.2	1

Tourist Numbers (Thousands)	2011	2010	% change
Serviced Accommodation	513.8	569.5	-10
Non-Serviced Accommodation	1,620.1	1,595.1	2
SFR	180.9	181.3	-0
Day Visitors	1,911.1	1,857.7	3
TOTAL	4,225.7	4,203.6	1

Sectors in which Employment is supported (FTE's)	2011	2010	% change
Direct Employment			
Accommodation	9,649	9,695	-0
Food & Drink	2,165	2,187	-1
Recreation	893	896	-0
Shopping	1,061	1,065	-0
Transport	411	416	-1
Total Direct Employment	14,180	14,258	-1
Indirect Employment	2,084	2,135	-2
TOTAL	16,264	16,393	-1

Economic Impact Analysis by Category of Tourist and by Industrial Sector

Pembrokeshire

Analysis by Category by Sector of Expenditure

Serviced Accommodation	
Analysis by Sector of Expenditure	
(£'s millions)	2011
Accommodation	35.54
Food & Drink	11.19
Recreation	1.89
Shopping	2.99
Transport	4.69
Total Direct Revenue	56.29
VAT	11.26
Total Direct Expenditure	67.55

Non-Serviced Accommodation	
Analysis by Sector of Expenditure	
(£'s millions)	2011
Accommodation	80.44
Food & Drink	75.12
Recreation	27.70
Shopping	39.18
Transport	28.22
Total Direct Revenue	250.66
VAT	50.13
Total Direct Expenditure	300.79

SFR	
Analysis by Sector of Expenditure	
(£'s millions)	2011
Food & Drink	3.29
Recreation	1.04
Shopping	3.08
Transport	1.84
Total Direct Revenue	9.24
VAT	1.85
Total Direct Expenditure	11.09

Day Visitors	
Analysis by Sector of Expenditure	
(£'s millions)	2011
Food & Drink	11.67
Recreation	3.79
Shopping	9.21
Transport	8.34
Total Direct Revenue	33.01
VAT	6.60
Total Direct Expenditure	39.61

Analysis by Sector of Expenditure	
(£'s millions)	2011
Accommodation	115.97
Food & Drink	101.27
Recreation	34.42
Shopping	54.46
Transport	43.08
VAT	69.84
Total Direct Expenditure	419.04
Indirect Expenditure	150.90
Total Economic Impact	569.94

STEAM *Bedstock Analysis*

Accommodation Category	Pembrokeshire 2011		Pembrokeshire 2010	
	Establishments	Beds / Sleeping Spaces	Establishments	Beds / Sleeping Spaces
<i>Serviced Accommodation</i>				
+50 room hotels	5	612	5	612
11-50 room hotels	67	3005	67	3005
<10 room hotels/others	824	6122	824	6122
<i>Serviced Total</i>	896	9739	896	9739
<i>Non-Serviced Accommodation</i>				
Self catering	3951	24540	3951	24540
Static caravans/chalets	22	1903	22	1903
Touring caravans/camping	450	35157	450	35157
Not-for-hire statics		7815		7815
<i>Non-Serviced Accommodation Total</i>	4423	69414	4423	69414
TOTAL	5,319	79,153	5,319	79,153

Tourism Impacts 2011

	UK	World
January	<p>Average temperatures & sunshine with below average rainfall.</p> <p>UK inflation at 4% and consumer confidence low.</p>	
February	<p>Weather mild but high rainfall.</p> <p>Inflation and unemployment rates increased.</p>	<p>Sterling weakened.</p>
March	<p>Weather warmer, drier and sunnier than average.</p>	<p>Price of oil remained high, with a number of airlines introducing fuel surcharges.</p>
April	<p>Easter weekend warm and sunny. Warmest April on record.</p> <p>Easter Sunday on April 24th.</p> <p>Royal Wedding and additional bank holiday on April 29th.</p>	<p>Portugal requested emergency bailout from EU.</p>

May	<p>Average temperatures and sunshine but above average rainfall.</p> <p>Inflation remained at 4.5%</p>	
June	<p>Average temperatures with above average rainfall.</p>	<p>Eurozone debt crisis continued.</p>
July	<p>Weather generally cloudy and damp. Coolest July since 2000.</p> <p>UK unemployment rose more than expected.</p>	
August	<p>Above average rainfall, with temperatures and sunshine well below average.</p> <p>Bank of England lowered its economic growth forecast for the UK in 2011 from 1.8% to 1.5%.</p>	
September	<p>Average sunshine and rainfall, but temperatures above average.</p> <p>UK consumer confidence remained negative.</p> <p>Consumer price inflation rose to 5.2%</p>	<p>General strike in Greece.</p> <p>Further decline in Eurozone consumer confidence, and US consumer confidence also remained low.</p> <p>Credit ratings agencies downgraded Spanish and Italian government debt.</p>

October	<p>Parts of Cornwall and West Wales hit by flooding in middle of month.</p> <p>Average sunshine and rainfall, but temperatures remained above average.</p> <p>UK economy expanded by 0.5% in the third quarter of 2011.</p>	Concerns over Italian government debt.
November	Second warmest November in 100 years.	OECD warned that UK and the Eurozone are likely to enter recession.
December	Weather much warmer and wetter than average.	Credit ratings of a number of Eurozone countries lowered, including France and Austria.

PEMBROKESHIRE COUNTY COUNCIL

6 Year Summary

All £'s 2011 indexed

Issued 12 July 2012

Analysis by Sector of Expenditure (£'s millions)	2011	2010	2009	2008	2007	2006
Accommodation	116.0	122.7	120.0	123.3	125.7	126.0
Food & Drink	101.3	102.3	95.3	101.8	100.2	98.7
Recreation	34.4	34.5	31.8	34.1	33.5	32.7
Shopping	54.5	54.7	51.1	54.2	53.4	52.4
Transport	43.1	43.5	41.1	43.4	42.8	42.4
Indirect Expenditure	150.9	151.3	143.8	149.9	150.0	147.4
VAT	69.8	62.6	59.4	62.4	62.2	61.7
TOTAL	569.9	571.7	542.6	569.1	567.8	561.3

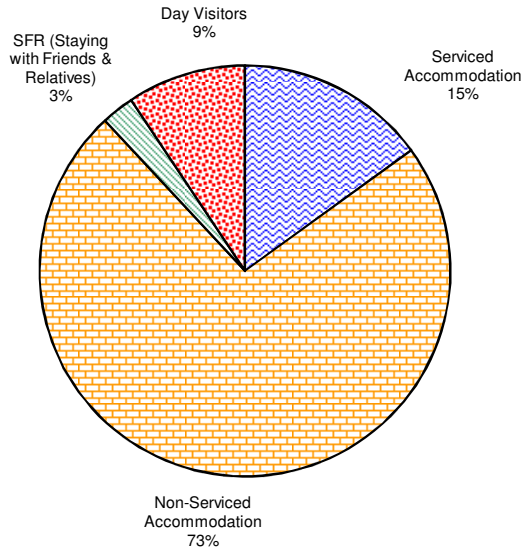
Revenue by Category of Visitor (£'s millions)	2011	2010	2009	2008	2007	2006
Serviced Accommodation	85.4	92.8	96.1	100.3	102.9	112.8
Non-Serviced Accommodation	416.5	412.3	376.3	401.8	397.8	379.2
SFR	14.6	14.7	14.9	14.7	14.6	14.7
Day Visitors	53.4	51.9	55.3	52.3	52.5	54.6
TOTAL	569.9	571.7	542.6	569.1	567.8	561.3

Tourist Days (Thousands)	2011	2010	2009	2008	2007	2006
Serviced Accommodation	1,058	1,157	1,193	1,252	1,259	1,381
Non-Serviced Accommodation	10,582	10,347	9,265	10,101	9,924	9,464
SFR	431	432	437	434	431	432
Day Visitors	1,911	1,858	1,974	1,868	1,877	1,954
TOTAL	13,981	13,793	12,869	13,654	13,492	13,232

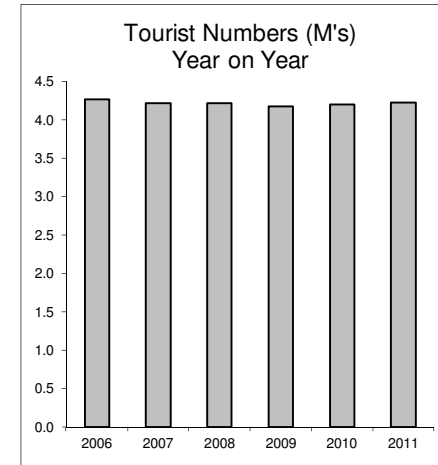
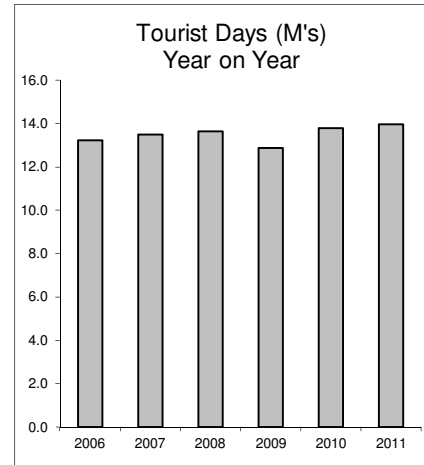
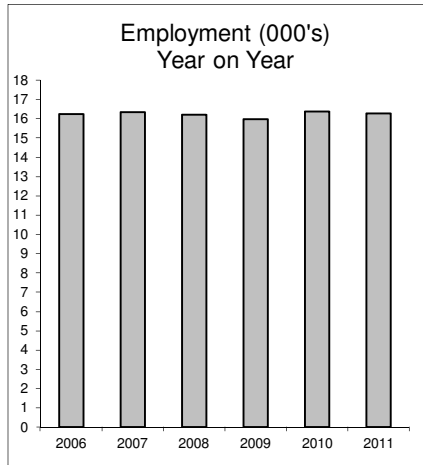
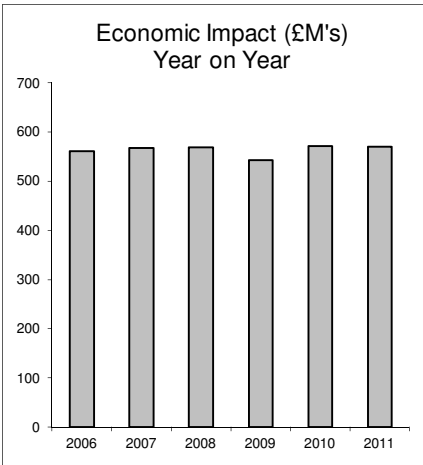
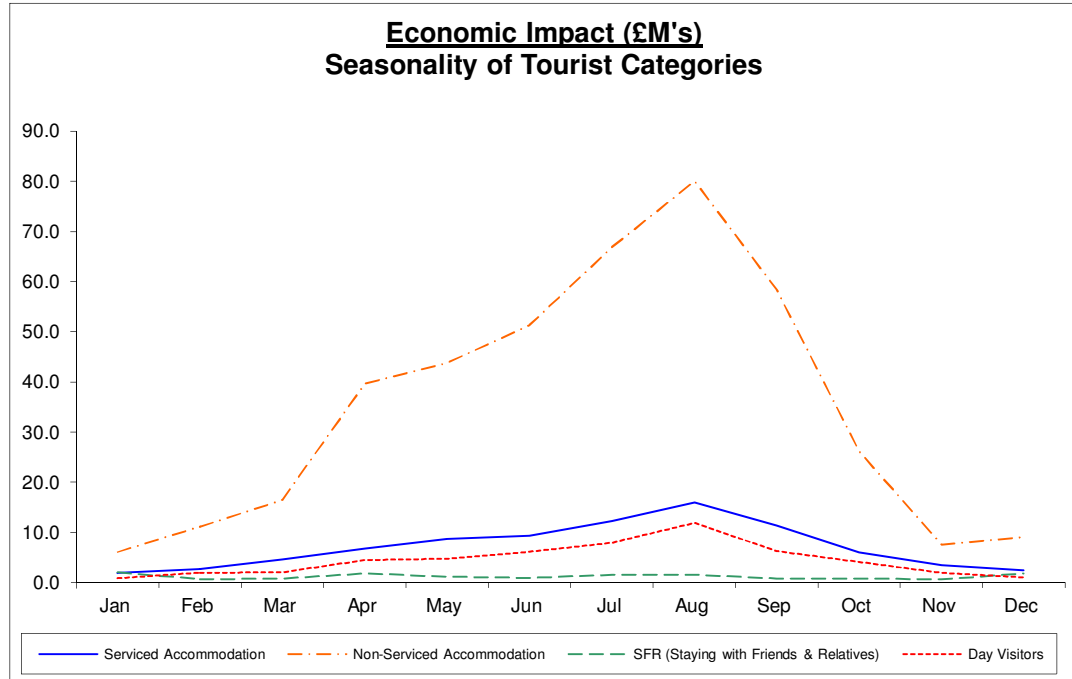
Tourist Numbers (Thousands)	2011	2010	2009	2008	2007	2006
Serviced Accommodation	514	569	581	620	609	669
Non-Serviced Accommodation	1,620	1,595	1,437	1,550	1,548	1,464
SFR	181	181	183	182	181	181
Day Visitors	1,911	1,858	1,974	1,868	1,877	1,954
TOTAL	4,226	4,204	4,176	4,220	4,215	4,270

Sectors in which Employment is supported (FTE's)	2011	2010	2009	2008	2007	2006
Direct Employment						
Accommodation	9,649	9,695	9,699	9,576	9,752	9,784
Food & Drink	2,165	2,187	2,036	2,176	2,142	2,111
Recreation	893	896	826	885	869	848
Shopping	1,061	1,065	996	1,056	1,040	1,021
Transport	411	416	393	414	408	405
Total Direct Employment	14,180	14,258	13,951	14,108	14,213	14,170
Indirect Employment	2,084	2,135	2,028	2,114	2,116	2,079
TOTAL	16,264	16,393	15,979	16,222	16,329	16,248

Economic Impact Relative Impact of Tourist Categories



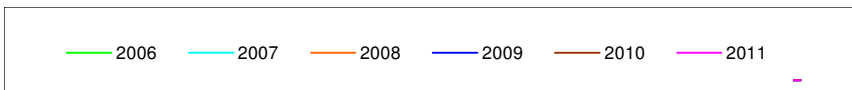
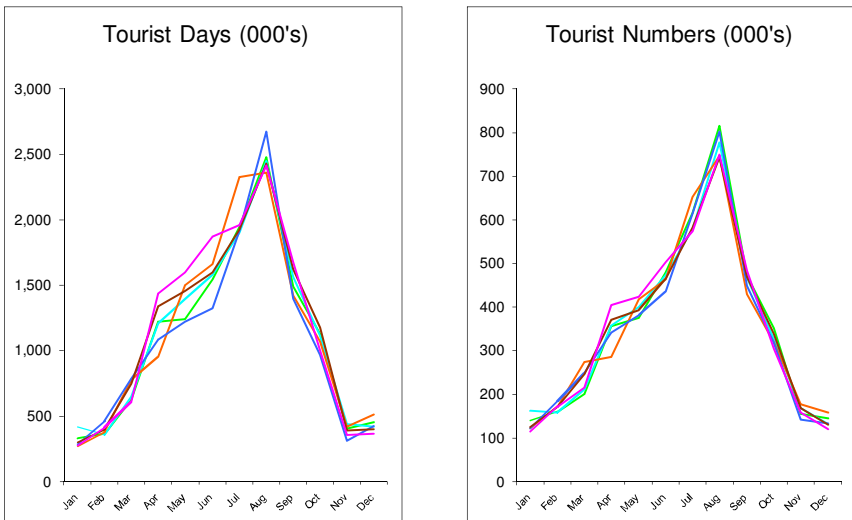
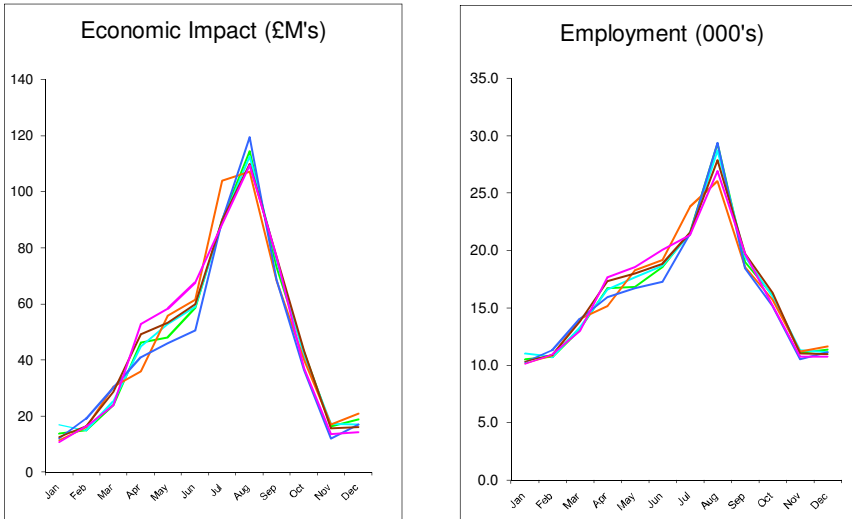
Economic Impact (£M's) Seasonality of Tourist Categories



Pembrokeshire 2011

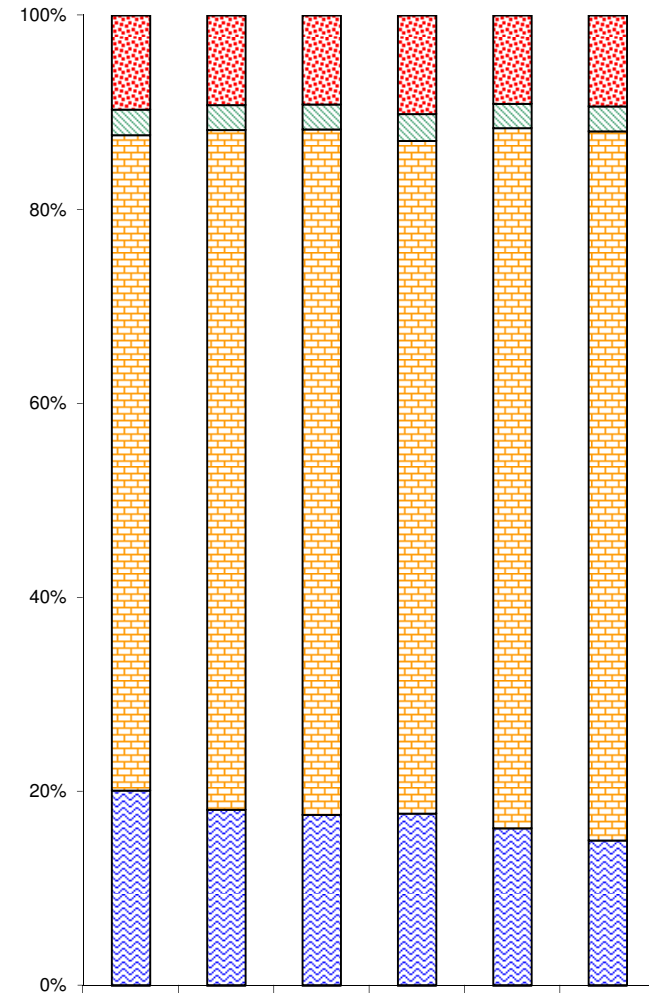
Indexation to 2011

Seasonality Comparisons of Major Indicators



Relative Impact Changes

Economic Impact (£M's)



	2006	2007	2008	2009	2010	2011
Day Visitors	54,633	52,467	52,296	55,268	51,928	53,420
SFR (Staying with Friends & Relatives)	14,668	14,643	14,742	14,855	14,656	14,618
Non-Serviced Accommodation	379,191	397,794	401,758	376,326	412,336	416,495
Serviced Accommodation	112,841	102,914	100,313	96,131	92,766	85,404

Economic Impact	Expenditure												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	7,896	11,908	17,486	38,756	43,126	50,091	64,973	80,371	56,530	27,273	10,151	10,483	419,043
Indirect Expenditure	2,895	4,574	6,447	14,042	15,252	17,640	23,504	29,027	20,372	9,814	3,498	3,831	150,895
Total	10,791	16,482	23,933	52,798	58,377	67,731	88,476	109,398	76,902	37,087	13,649	14,314	569,938

Economic Impact	Expenditure and Revenue												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	6,580	9,923	14,571	32,296	35,938	41,743	54,144	66,976	47,108	22,728	8,459	8,736	349,203
Indirect Expenditure	2,895	4,574	6,447	14,042	15,252	17,640	23,504	29,027	20,372	9,814	3,498	3,831	150,895
VAT	1,316	1,985	2,914	6,459	7,188	8,349	10,829	13,395	9,422	4,546	1,692	1,747	69,841
Total	10,791	16,482	23,933	52,798	58,377	67,731	88,476	109,398	76,902	37,087	13,649	14,314	569,938

Economic Impact	Generated by Category of Visitor												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	1,830	2,668	4,618	6,815	8,667	9,361	12,219	15,959	11,390	5,961	3,470	2,446	85,404
Non-Serviced Accommodation	6,055	11,175	16,473	39,654	43,769	51,260	66,883	79,980	58,480	26,154	7,564	9,048	416,495
SFR	2,033	683	777	1,854	1,193	919	1,491	1,578	813	812	633	1,832	14,618
Day Visitors	873	1,956	2,065	4,474	4,748	6,192	7,884	11,881	6,219	4,160	1,982	986	53,420
Total	10,791	16,482	23,933	52,798	58,377	67,731	88,476	109,398	76,902	37,087	13,649	14,314	569,938

Economic Impact	Sectors in which expenditure is made												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	1,821	3,139	4,547	8,448	9,291	10,416	21,400	26,597	19,121	6,189	2,489	2,514	115,972
Accommodation	1,821	3,139	4,547	8,448	9,291	10,416	21,400	26,597	19,121	6,189	2,489	2,514	115,972
Food & Drink	1,990	2,919	4,388	10,356	11,660	13,679	14,206	17,434	12,216	7,182	2,582	2,656	101,267
Recreation	650	974	1,459	3,561	3,995	4,709	4,854	5,916	4,164	2,430	827	879	34,417
Shopping	1,213	1,604	2,316	5,591	6,159	7,246	7,640	9,452	6,466	3,851	1,398	1,527	54,463
Transport	907	1,286	1,861	4,340	4,834	5,692	6,045	7,576	5,142	3,076	1,164	1,161	43,083
Total Direct Expenditure	6,580	9,923	14,571	32,296	35,938	41,743	54,144	66,976	47,108	22,728	8,459	8,736	349,203
VAT	1,316	1,985	2,914	6,459	7,188	8,349	10,829	13,395	9,422	4,546	1,692	1,747	69,841
Indirect Expenditure	2,895	4,574	6,447	14,042	15,252	17,640	23,504	29,027	20,372	9,814	3,498	3,831	150,895
Total	10,791	16,482	23,933	52,798	58,377	67,731	88,476	109,398	76,902	37,087	13,649	14,314	569,938

Population													Avg	
Total Population	117,100	117,100	117,100	117,100	117,100	117,100	117,100	117,100	117,100	117,100	117,100	117,100	117,100	117,100

Employment	Supported by tourism activity in these Categories												FTE's
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2,727	2,850	3,140	3,358	3,476	3,518	3,573	3,760	3,529	3,285	2,986	2,845	3,254
Non-Serviced Accommodation	6,518	6,986	8,393	11,131	11,765	12,660	12,606	16,504	11,864	9,609	6,817	6,875	10,144
SFR	292	98	112	266	171	132	214	226	117	117	91	263	175
Day Visitors	119	267	281	610	647	844	1,075	1,620	848	567	270	134	607
Total Direct Employment	9,656	10,200	11,926	15,365	16,060	17,153	17,468	22,110	16,357	13,578	10,163	10,118	14,180
Indirect Employment	480	758	1,069	2,327	2,528	2,924	3,896	4,811	3,377	1,627	580	635	2,084
Total	10,136	10,958	12,994	17,693	18,588	20,077	21,363	26,921	19,733	15,204	10,743	10,752	16,264

Employment	Sectors in which employment is supported												FTE's
	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	12,717	9,825	9,726	8,783	8,673	9,649
Food & Drink	510	749	1,126	2,657	2,991	3,509	3,644	4,472	3,134	1,842	662	681	2,165
Recreation	202	303	454	1,109	1,244	1,466	1,511	1,842	1,296	756	258	274	893
Shopping	284	375	542	1,308	1,440	1,695	1,787	2,211	1,512	901	327	357	1,061
Transport	104	147	213	497	554	652	693	868	589	353	133	133	411
Total Direct Employment	9,656	10,200	11,926	15,365	16,060	17,153	17,468	22,110	16,357	13,578	10,163	10,118	14,180
Indirect Employment	480	758	1,069	2,327	2,528	2,924	3,896	4,811	3,377	1,627	580	635	2,084
Total	10,136	10,958	12,994	17,693	18,588	20,077	21,363	26,921	19,733	15,204	10,743	10,752	16,264

Tourist Days	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	24.6	35.8	61.6	91.0	115.8	125.1	137.6	179.7	128.2	79.7	46.2	32.6	1,058
Non-Serviced Accommodation	158.8	288.6	454.5	1,130.4	1,275.7	1,498.4	1,497.6	1,764.0	1,300.0	749.2	218.9	245.6	10,582
SFR	59.9	20.1	22.9	54.6	35.1	27.1	43.9	46.5	23.9	23.9	18.6	54.0	431
Day Visitors	31.2	70.0	73.9	160.1	169.9	221.5	282.0	425.0	222.5	148.8	70.9	35.3	1,911
Total Tourist Days 000's	274.4	414.4	612.9	1,436.1	1,596.5	1,872.0	1,961.1	2,415.2	1,674.7	1,001.6	354.7	367.4	13,981

Tourist Numbers	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	13.4	20.4	36.1	48.6	53.3	54.5	62.6	74.6	61.8	37.6	30.3	20.7	514
Non-Serviced Accommodation	46.7	72.1	94.7	176.6	184.9	214.1	210.9	232.1	188.4	107.0	48.6	43.9	1,620
SFR	24.0	9.6	10.6	20.2	16.0	12.9	17.6	17.9	11.0	11.2	9.2	20.8	181
Day Visitors	31.2	70.0	73.9	160.1	169.9	221.5	282.0	425.0	222.5	148.8	70.9	35.3	1,911
Total Tourist Numbers 000's	115.3	172.2	215.3	405.5	424.0	502.9	573.1	749.6	483.7	304.6	159.1	120.6	4,226

Vehicle Days	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	6.4	12.4	22.3	23.8	33.3	34.8	35.9	46.9	33.5	21.5	12.5	8.5	292
Non-Serviced Accommodation	40.8	93.4	116.7	276.3	339.5	402.2	369.2	423.1	346.8	183.5	54.5	51.5	2,698
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	6.2	15.8	16.7	31.6	33.5	50.0	55.7	83.9	43.9	33.6	16.0	7.0	394
Total Vehicle Days 000's	71.1	127.5	162.4	347.9	416.9	495.0	473.8	567.7	431.3	245.7	88.5	83.0	3,511

Vehicle Numbers	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	3.5	7.1	13.0	12.7	15.3	15.3	16.4	19.6	16.1	10.2	8.1	5.4	143
Non-Serviced Accommodation	12.0	23.3	24.3	43.2	49.2	57.5	52.0	55.7	50.3	26.2	12.1	9.2	415
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	6.2	15.8	16.7	31.6	33.5	50.0	55.7	83.9	43.9	33.6	16.0	7.0	394
Total Vehicle Numbers 000's	28.8	49.1	57.2	93.5	102.8	126.6	129.3	164.5	113.6	73.3	39.0	27.7	1,005

BED STOCK (number of beds)	Average Available Sleeping Spaces												MAX
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
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	8,798	11,507	20,033	34,572	37,509	42,018	62,576	76,737	53,470	30,420	11,030	11,317	399,988	
Indirect Expenditure	3,140	4,268	7,244	12,210	13,192	15,022	22,873	27,781	19,591	10,800	3,807	4,081	144,007	
Total	11,938	15,775	27,276	46,783	50,700	57,040	85,449	104,518	73,062	41,220	14,837	15,398	543,995	

Economic Impact	Expenditure and Revenue												£000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Revenue	7,488	9,794	17,049	29,423	31,922	35,760	53,256	65,308	45,507	25,889	9,387	9,631	340,415	
Indirect Expenditure	3,140	4,268	7,244	12,210	13,192	15,022	22,873	27,781	19,591	10,800	3,807	4,081	144,007	
VAT	1,310	1,714	2,984	5,149	5,586	6,258	9,320	11,429	7,964	4,531	1,643	1,685	59,573	
Total	11,938	15,775	27,276	46,783	50,700	57,040	85,449	104,518	73,062	41,220	14,837	15,398	543,995	

Economic Impact	Generated by Category of Visitor												£000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	3,062	3,800	4,926	6,941	7,951	9,952	12,443	14,593	10,399	6,519	4,227	3,461	88,273	
Non-Serviced Accommodation	6,199	9,565	19,636	34,507	37,382	40,440	63,749	77,314	56,144	29,789	8,281	9,359	392,364	
SFR	1,939	652	741	1,769	1,138	876	1,422	1,506	776	775	604	1,748	13,946	
Day Visitors	737	1,759	1,973	3,566	4,230	5,772	7,835	11,106	5,744	4,136	1,726	829	49,412	
Total	11,938	15,775	27,276	46,783	50,700	57,040	85,449	104,518	73,062	41,220	14,837	15,398	543,995	

Economic Impact	Sectors in which expenditure is made												£000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Expenditure														
Accommodation	2,390	3,354	5,028	7,577	8,267	9,998	22,132	25,870	19,295	6,835	3,005	3,049	116,799	
Food & Drink	2,182	2,808	5,284	9,527	10,350	11,261	13,497	17,028	11,436	8,308	2,798	2,853	97,332	
Recreation	686	901	1,778	3,257	3,532	3,798	4,580	5,797	3,898	2,825	886	923	32,859	
Shopping	1,254	1,492	2,764	5,096	5,468	5,937	7,259	9,237	6,060	4,415	1,466	1,578	52,024	
Transport	976	1,240	2,196	3,966	4,306	4,766	5,788	7,377	4,818	3,507	1,233	1,229	41,401	
Total Direct Expenditure	7,488	9,794	17,049	29,423	31,922	35,760	53,256	65,308	45,507	25,889	9,387	9,631	340,415	
VAT	1,310	1,714	2,984	5,149	5,586	6,258	9,320	11,429	7,964	4,531	1,643	1,685	59,573	
Indirect Expenditure	3,140	4,268	7,244	12,210	13,192	15,022	22,873	27,781	19,591	10,800	3,807	4,081	144,007	
Total	11,938	15,775	27,276	46,783	50,700	57,040	85,449	104,518	73,062	41,220	14,837	15,398	543,995	

Population													Avg
Total Population	117,400	117,400	117,400	117,400	117,400	117,400	117,400	117,400	117,400	117,400	117,400	117,400	117,400

Employment	Supported by tourism activity in these Categories												FTE's
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2,813	2,933	3,179	3,396	3,468	3,596	3,630	3,745	3,517	3,347	3,049	2,920	3,300
Non-Serviced Accommodation	6,574	6,902	8,959	10,969	11,376	11,567	12,456	17,314	11,776	10,326	6,942	6,969	10,177
SFR	299	100	114	272	175	135	219	232	119	119	93	269	179
Day Visitors	108	257	289	522	619	845	1,146	1,625	840	605	253	121	602
Total Direct Employment	9,794	10,193	12,541	15,159	15,639	16,143	17,451	22,916	16,253	14,397	10,336	10,279	14,258
Indirect Employment	558	759	1,289	2,172	2,347	2,672	4,069	4,942	3,485	1,921	677	726	2,135
Total	10,352	10,952	13,829	17,331	17,986	18,815	21,520	27,858	19,738	16,318	11,013	11,005	16,393

Employment	Sectors in which employment is supported												FTE's
	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	13,270	9,825	9,726	8,783	8,673	9,695
Food & Drink	588	757	1,424	2,568	2,790	3,036	3,639	4,591	3,083	2,240	754	769	2,187
Recreation	224	295	582	1,065	1,155	1,242	1,498	1,896	1,275	924	290	302	896
Shopping	308	367	679	1,252	1,344	1,459	1,784	2,270	1,489	1,085	360	388	1,065
Transport	118	149	264	478	519	574	697	888	580	422	149	148	416
Total Direct Employment	9,794	10,193	12,541	15,159	15,639	16,143	17,451	22,916	16,253	14,397	10,336	10,279	14,258
Indirect Employment	558	759	1,289	2,172	2,347	2,672	4,069	4,942	3,485	1,921	677	726	2,135
Total	10,352	10,952	13,829	17,331	17,986	18,815	21,520	27,858	19,738	16,318	11,013	11,005	16,393

Tourist Days	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	43.2	53.5	69.1	97.4	111.6	139.7	147.2	172.7	123.0	91.6	59.2	48.4	1,157
Non-Serviced Accommodation	170.5	259.9	582.0	1,054.0	1,150.4	1,214.7	1,441.6	1,792.3	1,261.4	906.5	248.0	265.7	10,347
SFR	60.0	20.2	22.9	54.8	35.2	27.1	44.0	46.6	24.0	24.0	18.7	54.1	432
Day Visitors	27.7	66.1	74.2	134.1	159.0	217.0	294.6	417.5	215.9	155.5	64.9	31.2	1,858
Total Tourist Days 000's	301.4	399.7	748.3	1,340.2	1,456.3	1,598.6	1,927.4	2,429.1	1,624.4	1,177.6	390.8	399.4	13,793

Tourist Numbers	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	23.5	30.6	40.4	52.0	51.4	60.9	67.0	71.7	59.3	43.2	38.8	30.7	569
Non-Serviced Accommodation	50.2	65.0	121.3	164.7	166.7	173.5	203.0	235.8	182.8	129.5	55.1	47.5	1,595
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	27.7	66.1	74.2	134.1	159.0	217.0	294.6	417.5	215.9	155.5	64.9	31.2	1,858
Total Tourist Numbers 000's	125.4	171.3	246.5	371.0	393.1	464.3	582.2	743.0	469.1	339.4	168.0	130.1	4,204

Vehicle Days	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	11.2	18.5	25.0	25.4	32.1	38.8	38.4	45.1	32.1	24.7	16.0	12.7	320
Non-Serviced Accommodation	43.9	84.0	152.8	263.1	305.2	320.2	347.8	430.3	334.6	228.5	62.0	55.5	2,628
SFR	17.8	6.0	6.8	16.2	10.4	8.0	13.1	13.8	7.1	7.1	5.5	16.1	128
Day Visitors	5.5	14.9	16.7	26.5	31.4	49.0	58.2	82.5	42.6	35.1	14.6	6.2	383
Total Vehicle Days 000's	78.4	123.4	201.3	331.3	379.2	416.1	457.5	571.7	416.5	295.5	98.2	90.3	3,459

Vehicle Numbers	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	6.1	10.6	14.6	13.6	14.8	17.1	17.6	18.9	15.5	11.7	10.4	8.0	159
Non-Serviced Accommodation	12.9	21.0	31.8	41.1	44.2	45.7	49.0	56.6	48.5	32.6	13.8	9.9	407
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	5.5	14.9	16.7	26.5	31.4	49.0	58.2	82.5	42.6	35.1	14.6	6.2	383
Total Vehicle Numbers 000's	31.6	49.4	66.4	87.2	95.2	115.6	130.0	163.3	109.9	82.7	41.6	30.3	1,003

BED STOCK (number of beds)	Average Available Sleeping Spaces												MAX
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
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.

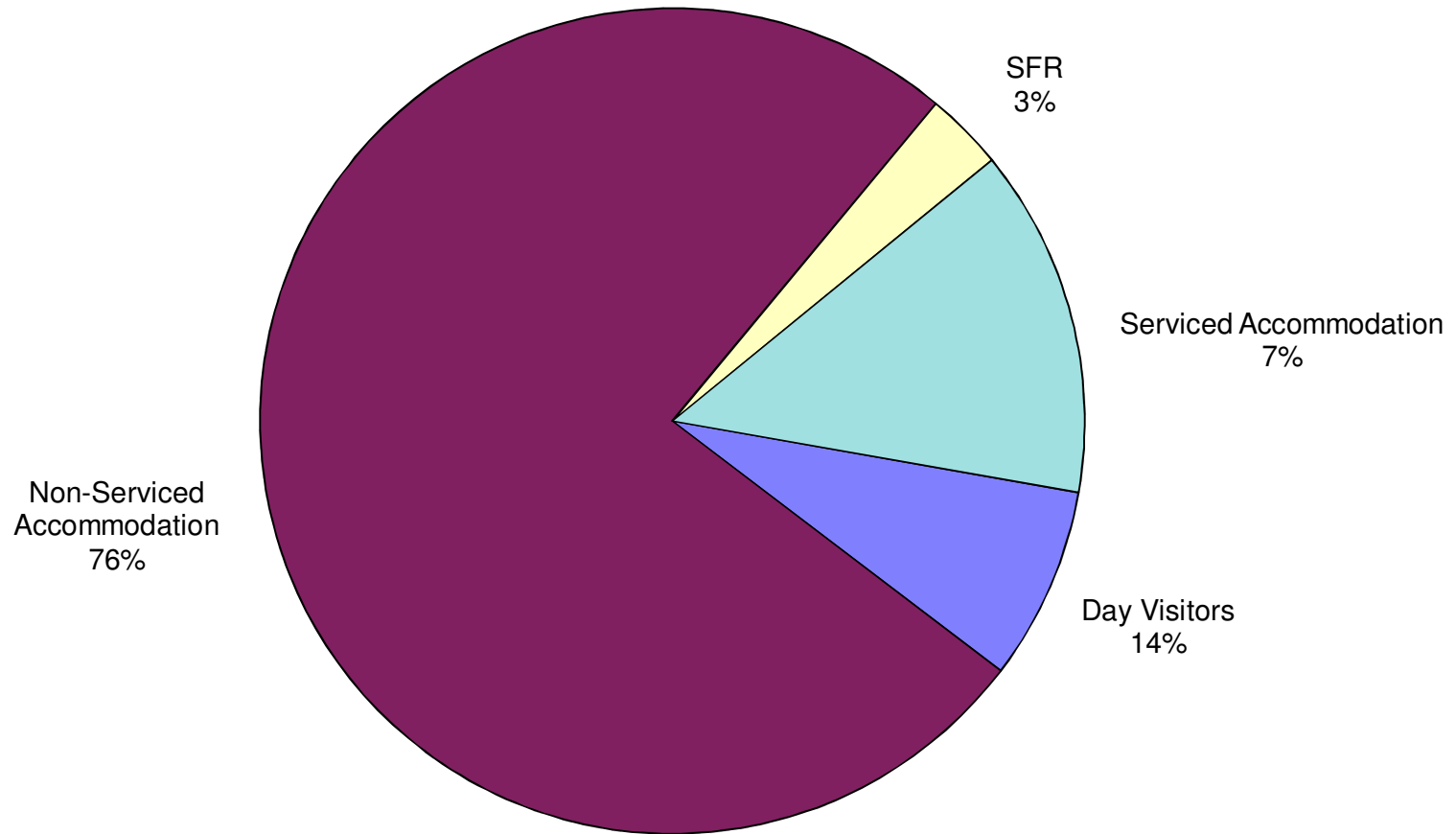
By way of comparison, the 95% confidence level sampling errors in the 2004 International Passenger Survey were +/- 3.1% for expenditure, +/- 3.0% for tourist numbers and +/- 4.6% for tourist nights. This is at a UK level – at infra-national and regional levels these errors would be higher.

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

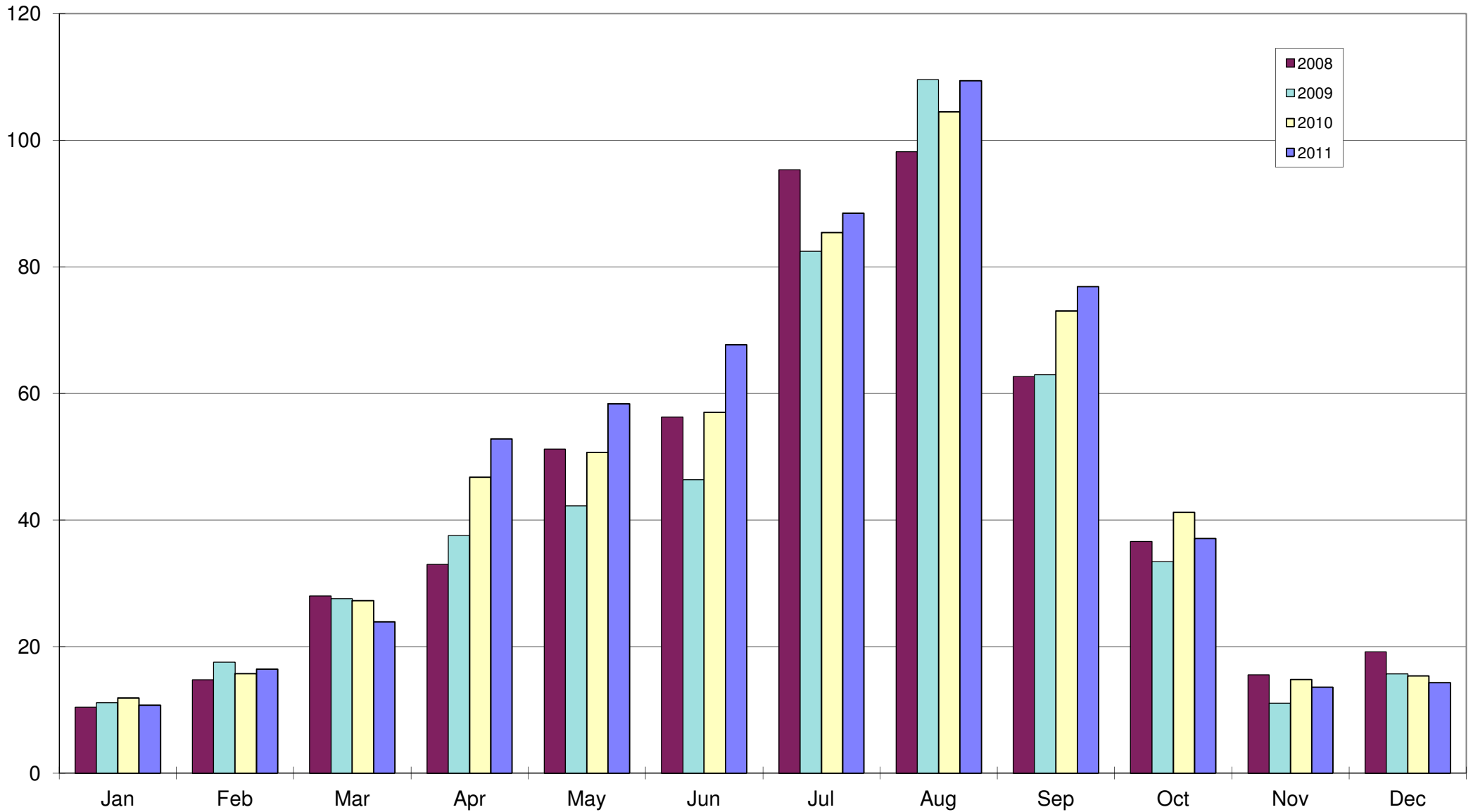
² Caused by unusual or eccentric events

³ Sir Ronald Aylmer Fisher (1890 – 1967)

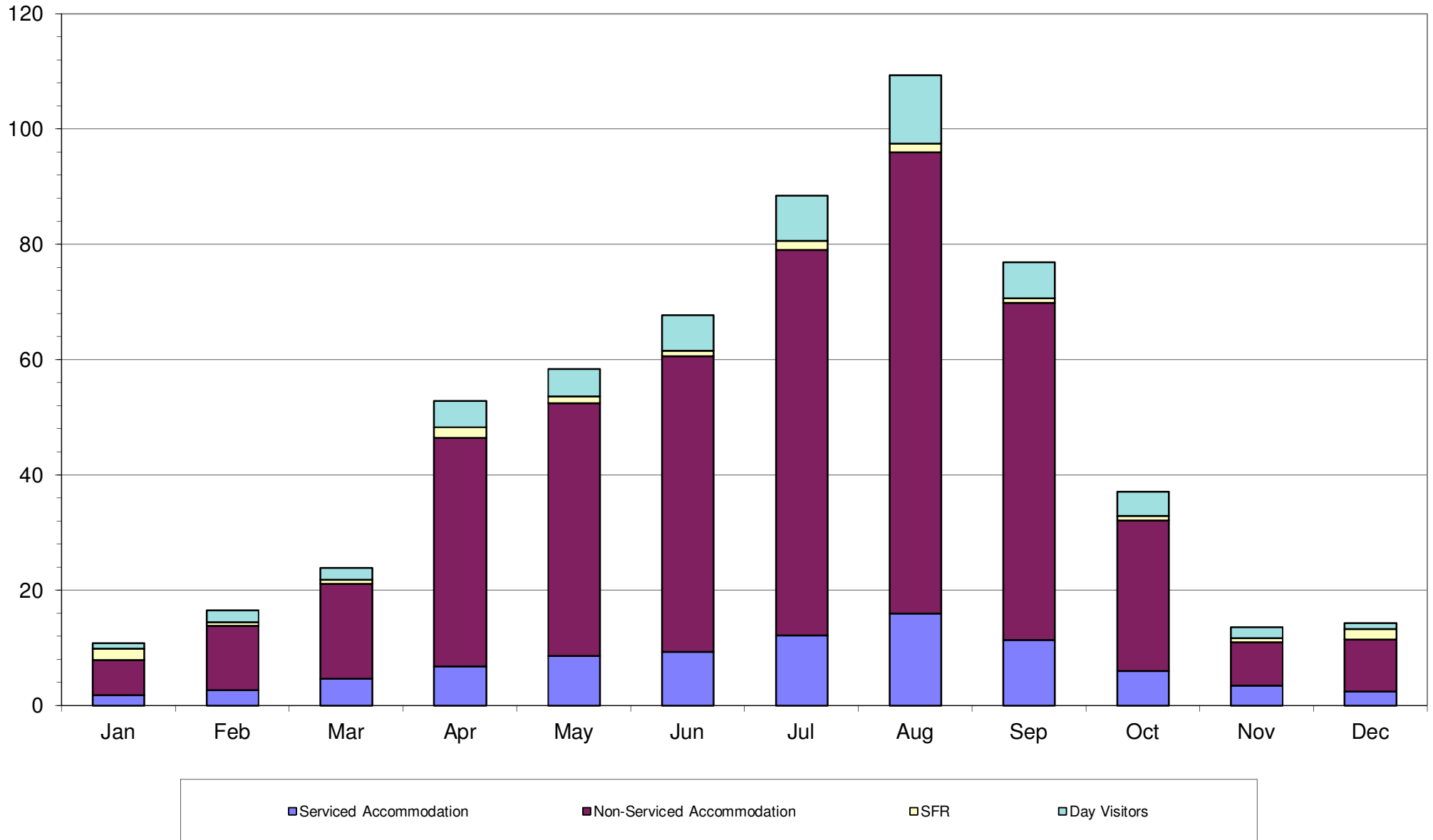
14.0 MILLION TOURIST DAYS : 2011 : BY TYPE OF TOURIST



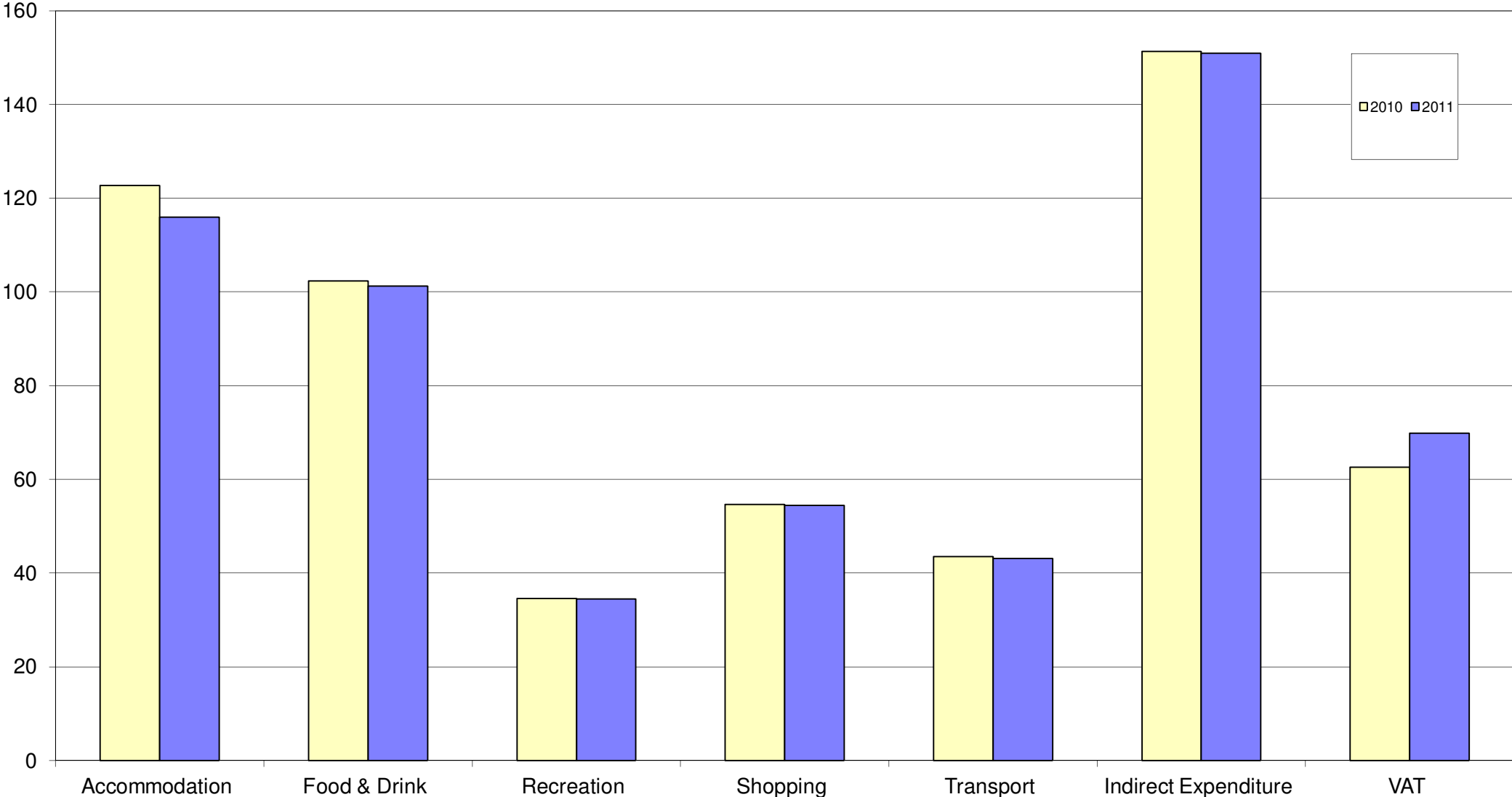
TOURISM EXPENDITURE : 2008 - 2011 : BY MONTH (£M's)



TOURISM EXPENDITURE 2011 : BY TYPE OF TOURIST : BY MONTH (£M's)



**TOURISM EXPENDITURE : BY INDUSTRY SECTOR
2011 COMPARED WITH 2010 (£M's)**



ANNUAL TOURISM EXPENDITURE (£M's)

