

DYFI VALLEY

STEAM REPORT 2005

DYFI VALLEY

STEAM REPORT 2005

CONTENTS

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

APPENDICES

Appendix 1 2004

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 2003

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 2003: By Type of Tourist: By Month	Chart 3
Tourism Expenditure: By Industry Sector: 2003 & 2002	Chart 4
Annual Tourism Expenditure 2001-2003	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 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 validation of STEAM requires to be set into 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 Baty, 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.*"

In Scotland, during 1995 and 1997, Scottish Enterprise Network, 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.

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.

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, the 2 National Parks in Wales and the Statistical Directorate of the National Assembly for Wales. These programmes are co-ordinated in Wales by its Projects Manager (Wales).

In 2004, GTS (UK) Ltd produced over 200 STEAM Reports for clients, including Regional Development Authorities, County Councils, Unitary Authorities, Shire Districts, Local Area Reports, and for a variety of other public agencies and authorities.

Internationally, the World Tourism Organisation, OECD and Eurostat are encouraging national tourism organisations to adopt Tourism Satellite Accounts (TSA). At present, about twenty countries have the capability to readily produce TSAs, but many others cannot and research is in progress to examine the potential for STEAM to generate a "proxy" TSA. Research has also been conducted by the Malta Statistics Authority in conjunction with the Malta Tourism Authority. Whether this is a viable proposition remains to be seen but progress so far is encouraging and recent work completed in Scotland and Wales indicates other collateral benefits.

3. A BRIEF OUTLINE OF STEAM

3.1 STEAM - The Model

STEAM is not a statistically estimated model in the manner of an input-output model of the local economy. It 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.

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.

All STEAM reports are produced on behalf of clients by a technical team located at the GTS (UK) Ltd Data Processing Centre in New Holland. 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

The bi-annual UK Leisure Day Visitor Survey provides the information necessary to estimate the number of Tourist Day Visitors to an area. Additionally, it is usually possible to obtain the number of Leisure Day Visitors originating from outside a local area, from their home addresses and whose stay is three hours or more.

g) Rates of Daily Expenditure

From primary research commissioned from System Three, an array of proxy variables tables has been developed which are applicable to both visitor categories and destination types. These are presently being updated.

h) General Visitor Information

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

i) 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.

j) 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.

k) 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 consists of five segments, each providing an annual summary, compared with the previous year, of the main topics reported on in the subsequent Comparison Tables, and are summarised as follows:

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 without taking into account their respective lengths 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 reports is only that generated by estimated visitor spend. 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 impact 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 impact in STEAM.

Appendix 7

Report on statistical confidence levels in STEAM.

4.5 Charts

Provides an indicative group of charts to 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

DYFI VALLEY
STEAM Report 2005
Numeric Executive Summary

Analysis by Sector of Expenditure (£'s millions)	2005	2004	% change
Accommodation	3.6	4.0	-10
Food & Drink	6.3	6.6	-4
Recreation	2.0	2.1	-4
Shopping	12.5	13.1	-4
Transport	3.2	3.4	-4
Indirect Expenditure	11.6	12.2	-5
VAT	4.8	5.1	-5
TOTAL	44.1	46.4	-5

Revenue by Category of Visitor (£'s millions)	2005	2004	% change
Serviced Accommodation	3.6	3.8	-5
Non-Serviced Accommodation	15.3	16.5	-7
SFR	0.7	0.7	-0
Day Visitors	24.4	25.3	-4
TOTAL	44.1	46.4	-5

Tourist Days (Thousands)	2005	2004	% change
Serviced Accommodation	55	56	-3
Non-Serviced Accommodation	424	450	-6
SFR	31	31	0
Day Visitors	751	778	-4
TOTAL	1,261	1,316	-4

Tourist Numbers (Thousands)	2005	2004	% change
Serviced Accommodation	32	33	-4
Non-Serviced Accommodation	65	69	-6
SFR	13	13	0
Day Visitors	751	778	-4
TOTAL	860	893	-4

Sectors in which Employment is supported (FTE's)	2005	2004	% change
Direct Employment			
Accommodation	296	299	-1
Food & Drink	164	171	-4
Recreation	62	65	-4
Shopping	296	309	-4
Transport	38	39	-4
Total Direct Employment	857	884	-3
Indirect Employment	198	209	-5
TOTAL	1,055	1,092	-3

2 EXPENDITURE

This is the final report for 2005, with comparisons with 2004

2.1 DIRECT Vs INDIRECT (£000's)

Month of	January	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		722	828	-13
Indirect Expenditure		247	287	-14
TOTAL		969	1,115	-13
Month of	February	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		898	984	-9
Indirect Expenditure		316	346	-9
TOTAL		1,213	1,331	-9
Month of	March	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		2,208	1,353	63
Indirect Expenditure		770	468	65
TOTAL		2,978	1,821	64
Month of	April	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		2,537	3,509	-28
Indirect Expenditure		899	1,247	-28
TOTAL		3,436	4,757	-28
Month of	May	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		2,840	2,895	-2
Indirect Expenditure		1,007	1,025	-2
TOTAL		3,847	3,919	-2
Month of	June	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		3,504	3,841	-9
Indirect Expenditure		1,243	1,368	-9
TOTAL		4,747	5,209	-9
Month of	July	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		4,874	5,263	-7
Indirect Expenditure		1,738	1,884	-8
TOTAL		6,613	7,147	-7

2.1 DIRECT Vs INDIRECT (£000's)

Month of	August	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		6,777	6,865	-1
Indirect Expenditure		2,430	2,472	-2
TOTAL		9,208	9,337	-1
Month of	September	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		3,569	3,778	-6
Indirect Expenditure		1,287	1,369	-6
TOTAL		4,856	5,147	-6
Month of	October	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		2,723	2,919	-7
Indirect Expenditure		973	1,041	-7
TOTAL		3,695	3,960	-7
Month of	November	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		805	918	-12
Indirect Expenditure		282	322	-13
TOTAL		1,087	1,241	-12
Month of	December	<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		1,070	1,068	0
Indirect Expenditure		380	379	0
TOTAL		1,449	1,447	0
Cumulative to December		<u>2005</u>	<u>2004</u>	<u>% change</u>
Direct Expenditure		32,527	34,222	-5
Indirect Expenditure		11,570	12,209	-5
TOTAL		44,098	46,431	-5

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

Month of	January	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		84	95	-12
Food & Drink		149	168	-11
Recreation		42	48	-12
Shopping		270	314	-14
Transport		70	80	-13
Indirect Expenditure		247	287	-14
VAT		108	123	-13
TOTAL		969	1,115	-13

Month of	February	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		87	104	-16
Food & Drink		170	185	-8
Recreation		51	56	-8
Shopping		367	398	-8
Transport		88	96	-8
Indirect Expenditure		316	346	-9
VAT		134	147	-9
TOTAL		1,213	1,331	-9

Month of	March	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		158	138	14
Food & Drink		445	275	62
Recreation		136	83	63
Shopping		911	518	76
Transport		229	137	68
Indirect Expenditure		770	468	65
VAT		329	201	63
TOTAL		2,978	1,821	64

Month of	April	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		200	278	-28
Food & Drink		520	705	-26
Recreation		159	220	-28
Shopping		1,017	1,421	-28
Transport		263	362	-28
Indirect Expenditure		899	1,247	-28
VAT		378	523	-28
TOTAL		3,436	4,757	-28

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

Month of	May	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		258	294	-12
Food & Drink		580	587	-1
Recreation		184	191	-4
Shopping		1,101	1,093	1
Transport		294	298	-1
Indirect Expenditure		1,007	1,025	-2
VAT		423	431	-2
TOTAL		3,847	3,919	-2

Month of	June	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		297	324	-8
Food & Drink		708	769	-8
Recreation		228	246	-7
Shopping		1,385	1,533	-10
Transport		364	398	-8
Indirect Expenditure		1,243	1,368	-9
VAT		522	572	-9
TOTAL		4,747	5,209	-9

Month of	July	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		662	740	-11
Food & Drink		920	983	-6
Recreation		292	312	-6
Shopping		1,802	1,939	-7
Transport		472	505	-7
Indirect Expenditure		1,738	1,884	-8
VAT		726	784	-7
TOTAL		6,613	7,147	-7

Month of	August	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		783	843	-7
Food & Drink		1,282	1,285	-0
Recreation		407	406	0
Shopping		2,628	2,640	-0
Transport		669	669	-0
Indirect Expenditure		2,430	2,472	-2
VAT		1,009	1,022	-1
TOTAL		9,208	9,337	-1

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

Month of	September	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		564	658	-14
Food & Drink		655	678	-3
Recreation		207	215	-4
Shopping		1,277	1,318	-3
Transport		334	346	-3
Indirect Expenditure		1,287	1,369	-6
VAT		532	563	-6
TOTAL		4,856	5,147	-6

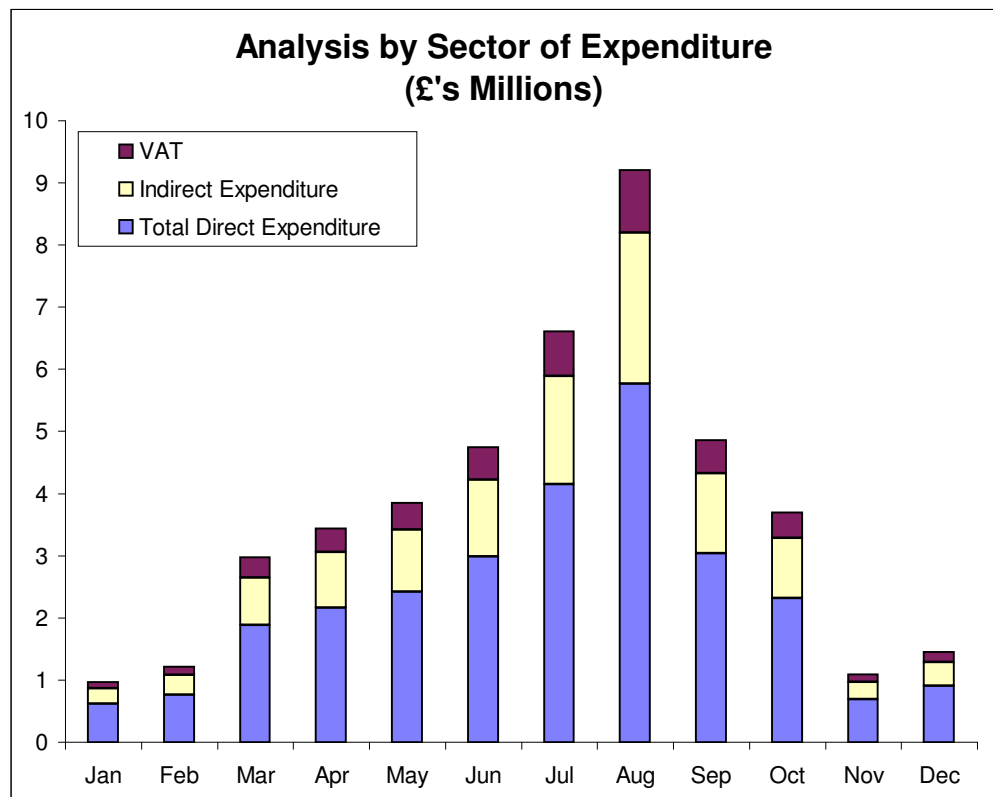
Month of	October	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		245	264	-7
Food & Drink		548	583	-6
Recreation		169	181	-7
Shopping		1,076	1,158	-7
Transport		279	298	-7
Indirect Expenditure		973	1,041	-7
VAT		406	435	-7
TOTAL		3,695	3,960	-7

Month of	November	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		110	114	-4
Food & Drink		157	178	-12
Recreation		46	52	-12
Shopping		296	349	-15
Transport		77	89	-13
Indirect Expenditure		282	322	-13
VAT		120	137	-12
TOTAL		1,087	1,241	-12

Month of	December	<u>2005</u>	<u>2004</u>	<u>% change</u>
Accommodation		118	110	8
Food & Drink		212	212	-0
Recreation		62	62	1
Shopping		414	420	-2
Transport		104	105	-0
Indirect Expenditure		380	379	0
VAT		159	159	0
TOTAL		1,449	1,447	0

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

Cumulative to December	2005	2004	% change
Accommodation	3,566	3,961	-10
Food & Drink	6,347	6,609	-4
Recreation	1,983	2,072	-4
Shopping	12,544	13,102	-4
Transport	3,243	3,382	-4
Indirect Expenditure	11,570	12,209	-5
VAT	4,844	5,097	-5
TOTAL	44,098	46,431	-5



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

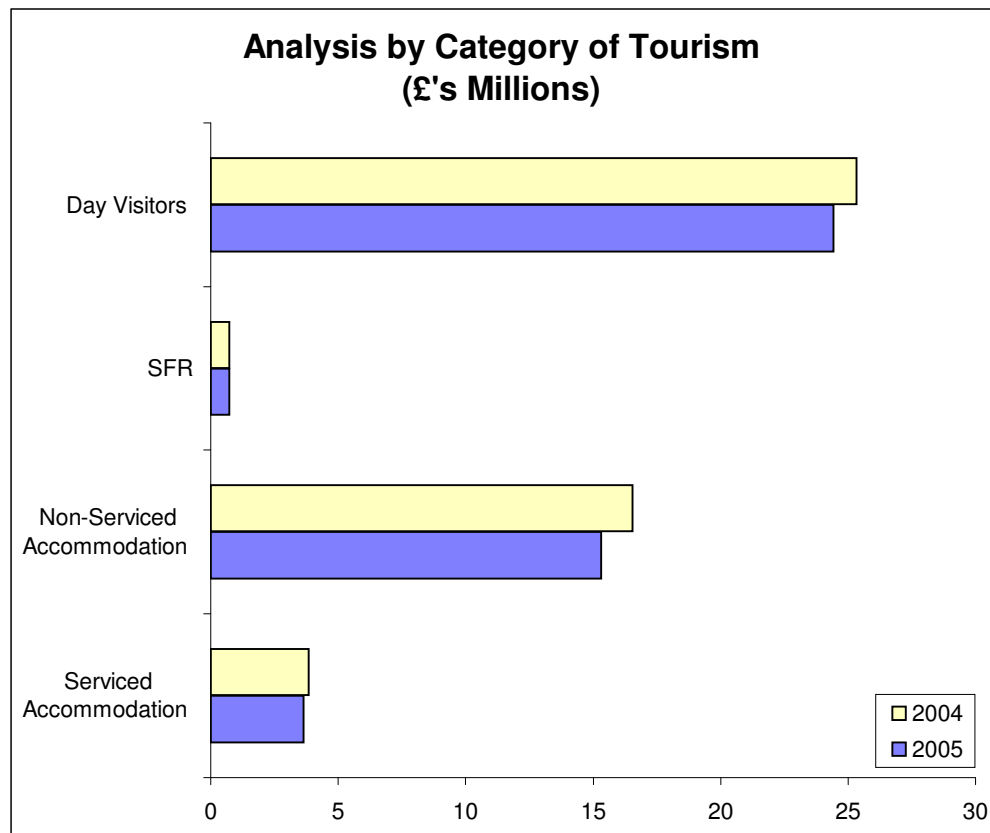
Month of	January	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		153	160	-4
Non-Serviced Accommodation		239	291	-18
SFR		101	101	-0
Day Visitors		476	563	-15
TOTAL		969	1,115	-13
Month of	February	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		152	177	-14
Non-Serviced Accommodation		234	272	-14
SFR		34	34	-0
Day Visitors		793	848	-6
TOTAL		1,213	1,331	-9
Month of	March	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		226	209	8
Non-Serviced Accommodation		727	574	27
SFR		39	39	-0
Day Visitors		1,987	1,000	99
TOTAL		2,978	1,821	64
Month of	April	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		236	320	-26
Non-Serviced Accommodation		1,150	1,509	-24
SFR		92	92	-0
Day Visitors		1,958	2,835	-31
TOTAL		3,436	4,757	-28
Month of	May	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		322	369	-13
Non-Serviced Accommodation		1,477	1,596	-7
SFR		59	59	-0
Day Visitors		1,989	1,895	5
TOTAL		3,847	3,919	-2
Month of	June	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		369	373	-1
Non-Serviced Accommodation		1,685	1,812	-7
SFR		46	46	-0
Day Visitors		2,647	2,979	-11
TOTAL		4,747	5,209	-9

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

Month of	July	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		548	569	-4
Non-Serviced Accommodation		2,503	2,736	-9
SFR		74	74	-0
Day Visitors		3,488	3,768	-7
TOTAL		6,613	7,147	-7
Month of	August	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		524	508	3
Non-Serviced Accommodation		3,173	3,331	-5
SFR		78	78	-0
Day Visitors		5,433	5,420	0
TOTAL		9,208	9,337	-1
Month of	September	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		448	502	-11
Non-Serviced Accommodation		2,002	2,236	-10
SFR		40	40	-0
Day Visitors		2,366	2,368	-0
TOTAL		4,856	5,147	-6
Month of	October	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		299	313	-5
Non-Serviced Accommodation		1,338	1,393	-4
SFR		40	40	-0
Day Visitors		2,019	2,213	-9
TOTAL		3,695	3,960	-7
Month of	November	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		187	186	1
Non-Serviced Accommodation		348	368	-6
SFR		31	31	-0
Day Visitors		520	655	-21
TOTAL		1,087	1,241	-12
Month of	December	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		174	152	14
Non-Serviced Accommodation		435	417	4
SFR		91	91	-0
Day Visitors		749	787	-5
TOTAL		1,449	1,447	0

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

Cumulative to December	2005	2004	% change
Serviced Accommodation	3,637	3,838	-5
Non-Serviced Accommodation	15,310	16,537	-7
SFR	725	725	-0
Day Visitors	24,425	25,331	-4
TOTAL	44,098	46,431	-5



3 TOURIST DAYS AND NUMBERS

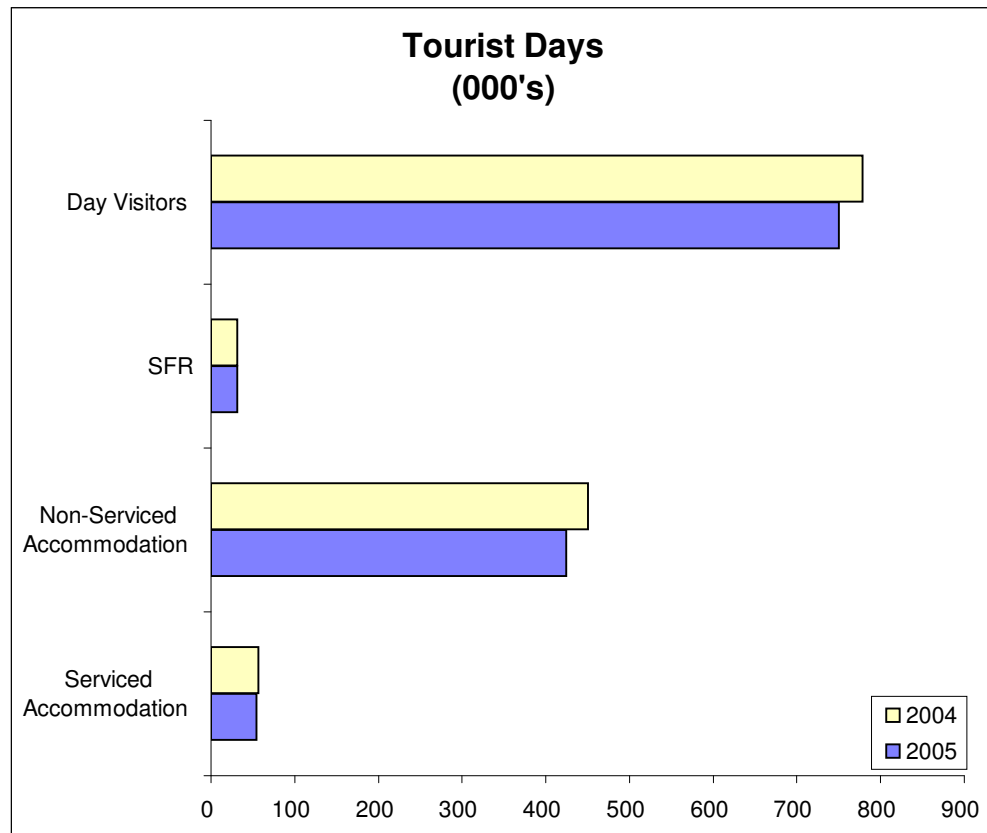
3.1 TOURIST DAYS (000's)

Month of	January	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		2.4	2.5	-2
Non-Serviced Accommodation		7.5	8.8	-15
SFR		4.3	4.3	0
Day Visitors		14.6	17.3	-15
TOTAL		28.9	32.9	-12
Month of	February	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		2.4	2.8	-12
Non-Serviced Accommodation		6.1	7.1	-14
SFR		1.4	1.4	0
Day Visitors		24.4	26.1	-6
TOTAL		34.4	37.3	-8
Month of	March	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		3.6	3.3	11
Non-Serviced Accommodation		23.0	18.6	24
SFR		1.6	1.6	0
Day Visitors		61.0	30.7	99
TOTAL		89.3	54.2	65
Month of	April	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		3.8	5.0	-25
Non-Serviced Accommodation		35.5	44.9	-21
SFR		3.9	3.9	0
Day Visitors		60.2	87.1	-31
TOTAL		103.3	140.9	-27
Month of	May	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		5.2	5.8	-11
Non-Serviced Accommodation		45.4	48.5	-6
SFR		2.5	2.5	0
Day Visitors		61.1	58.2	5
TOTAL		114.2	115.1	-1
Month of	June	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		6.0	5.9	1
Non-Serviced Accommodation		50.9	53.9	-6
SFR		1.9	1.9	0
Day Visitors		81.3	91.5	-11
TOTAL		140.1	153.3	-9

3.1 TOURIST DAYS (000's)				
Month of	July	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		7.4	7.5	-1
Non-Serviced Accommodation		64.5	68.8	-6
SFR		3.2	3.2	0
Day Visitors		107.2	115.8	-7
TOTAL		182.3	195.3	-7
Month of	August	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		7.2	6.7	8
Non-Serviced Accommodation		79.3	81.7	-3
SFR		3.3	3.3	0
Day Visitors		167.0	166.5	0
TOTAL		256.8	258.3	-1
Month of	September	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		6.1	6.6	-8
Non-Serviced Accommodation		49.2	53.4	-8
SFR		1.7	1.7	0
Day Visitors		72.7	72.8	-0
TOTAL		129.7	134.5	-4
Month of	October	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		4.8	4.9	-2
Non-Serviced Accommodation		40.4	41.7	-3
SFR		1.7	1.7	0
Day Visitors		62.0	68.0	-9
TOTAL		109.0	116.4	-6
Month of	November	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		3.0	2.9	3
Non-Serviced Accommodation		10.4	10.8	-4
SFR		1.3	1.3	0
Day Visitors		16.0	20.1	-21
TOTAL		30.7	35.2	-13
Month of	December	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		2.8	2.4	16
Non-Serviced Accommodation		12.3	11.8	5
SFR		3.9	3.9	0
Day Visitors		23.0	24.2	-5
TOTAL		42.0	42.2	-1

3.1 TOURIST DAYS (000's)

Cumulative to December	2005	2004	% change
Serviced Accommodation	54.7	56.3	-3
Non-Serviced Accommodation	424.5	450.2	-6
SFR	31.0	31.0	0
Day Visitors	750.5	778.3	-4
TOTAL	1,260.7	1,315.8	-4



3.2 TOURIST NUMBERS (000's)

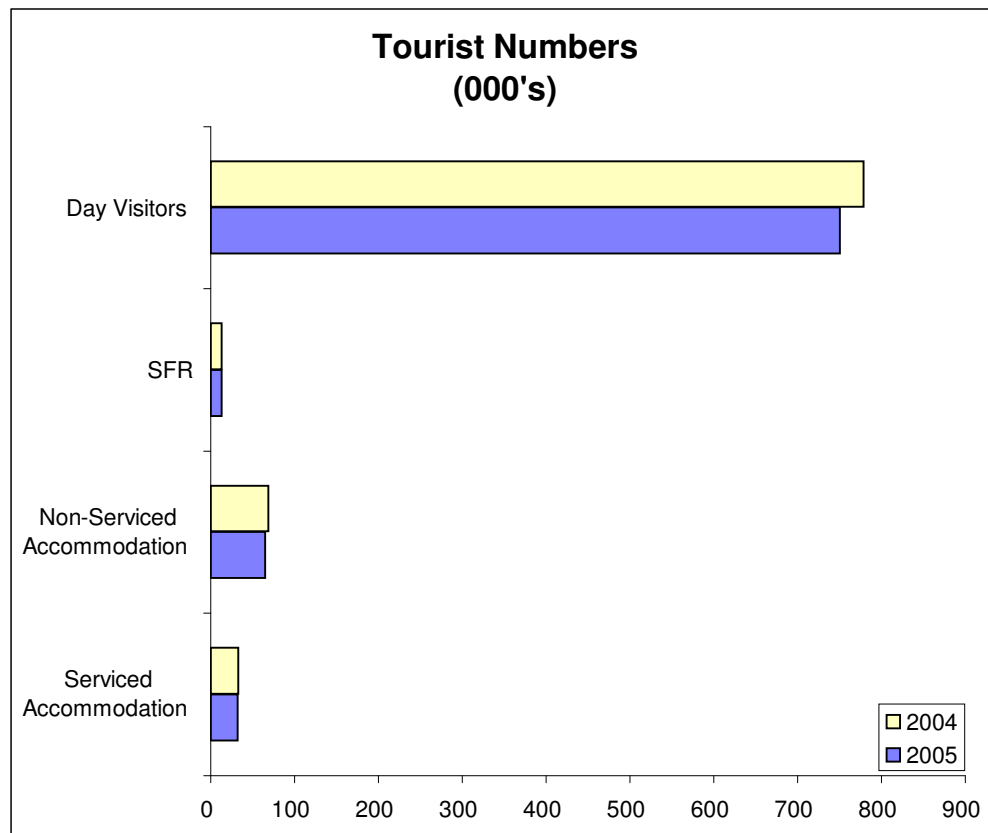
Month of	January	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		1.6	1.6	-4
Non-Serviced Accommodation		2.2	2.6	-15
SFR		1.7	1.7	0
Day Visitors		14.6	17.3	-15
TOTAL		20.1	23.3	-13
Month of	February	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		1.7	1.9	-13
Non-Serviced Accommodation		1.5	1.8	-14
SFR		0.7	0.7	0
Day Visitors		24.4	26.1	-6
TOTAL		28.3	30.4	-7
Month of	March	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		1.8	1.6	12
Non-Serviced Accommodation		4.8	3.9	24
SFR		0.8	0.8	0
Day Visitors		61.0	30.7	99
TOTAL		68.4	36.9	85
Month of	April	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		2.1	2.8	-25
Non-Serviced Accommodation		5.5	7.0	-21
SFR		1.5	1.5	0
Day Visitors		60.2	87.1	-31
TOTAL		69.3	98.4	-30
Month of	May	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		2.8	3.2	-11
Non-Serviced Accommodation		6.6	7.0	-6
SFR		1.1	1.1	0
Day Visitors		61.1	58.2	5
TOTAL		71.6	69.6	3
Month of	June	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		3.4	3.4	1
Non-Serviced Accommodation		7.3	7.7	-6
SFR		0.9	0.9	0
Day Visitors		81.3	91.5	-11
TOTAL		93.0	103.5	-10

3.2 TOURIST NUMBERS (000's)

Month of	July	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		4.6	4.7	-2
Non-Serviced Accommodation		9.1	9.7	-6
SFR		1.3	1.3	0
Day Visitors		107.2	115.8	-7
TOTAL		122.2	131.5	-7
Month of	August	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		4.3	4.1	4
Non-Serviced Accommodation		10.4	10.8	-3
SFR		1.3	1.3	0
Day Visitors		167.0	166.5	0
TOTAL		182.9	182.7	0
Month of	September	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		3.2	3.5	-9
Non-Serviced Accommodation		7.1	7.7	-8
SFR		0.8	0.8	0
Day Visitors		72.7	72.8	-0
TOTAL		83.8	84.8	-1
Month of	October	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		2.7	2.8	-3
Non-Serviced Accommodation		5.8	6.0	-3
SFR		0.8	0.8	0
Day Visitors		62.0	68.0	-9
TOTAL		71.3	77.6	-8
Month of	November	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		1.8	1.8	3
Non-Serviced Accommodation		2.3	2.4	-4
SFR		0.7	0.7	0
Day Visitors		16.0	20.1	-21
TOTAL		20.8	25.0	-17
Month of	December	<u>2005</u>	<u>2004</u>	<u>% change</u>
Serviced Accommodation		1.7	1.5	16
Non-Serviced Accommodation		2.2	2.1	5
SFR		1.5	1.5	0
Day Visitors		23.0	24.2	-5
TOTAL		28.4	29.3	-3

3.2 TOURIST NUMBERS (000's)

Cumulative to December	2005	2004	% change
Serviced Accommodation	31.7	32.8	-4
Non-Serviced Accommodation	64.9	68.7	-6
SFR	13.0	13.0	0
Day Visitors	750.5	778.3	-4
TOTAL	860.1	892.9	-4



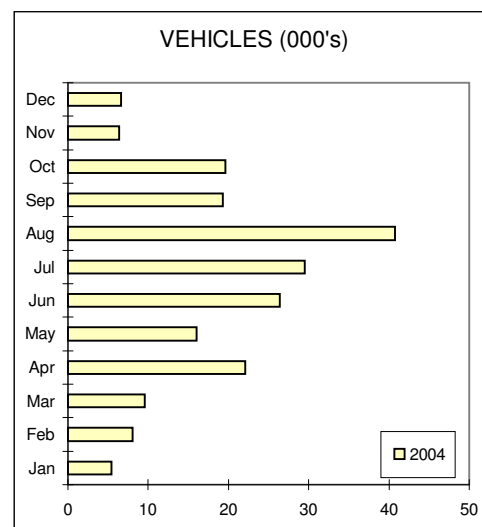
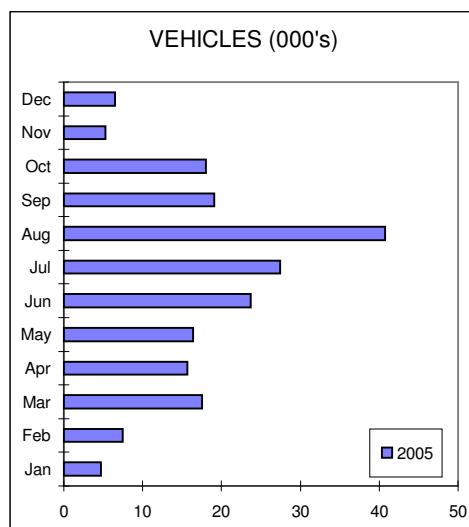
4 TOURIST TRAFFIC **2005** **2004** **% change**

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

	2005	2004	% change
Jan	4.7	5.4	-13
Feb	7.5	8.0	-7
Mar	17.5	9.6	83
Apr	15.6	22.1	-29
May	16.4	16.0	3
Jun	23.7	26.4	-10
Jul	27.5	29.5	-7
Aug	40.8	40.7	0
Sep	19.0	19.3	-1
Oct	18.0	19.6	-8
Nov	5.3	6.4	-17
Dec	6.5	6.6	-3
TOTAL	202.6	209.8	-3

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

VEHICLE DAYS (000's)	2005	2004	% change
Jan	7.2	8.1	-12
Feb	9.6	10.5	-8
Mar	23.4	14.4	63
Apr	24.4	33.1	-26
May	28.2	28.7	-2
Jun	36.9	40.3	-9
Jul	42.8	45.7	-6
Aug	59.0	59.3	-0
Sep	31.8	33.1	-4
Oct	27.8	29.7	-6
Nov	8.0	9.1	-13
Dec	9.7	9.8	-0
TOTAL	308.7	321.8	-4



Economic Impact	Expenditure and Revenue £'000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	722	898	2,208	2,537	2,840	3,504	4,874	6,777	3,569	2,723	805	1,070	32,527
Indirect Expenditure	247	316	770	899	1,007	1,243	1,738	2,430	1,287	973	282	380	11,570
Total	969	1,213	2,978	3,436	3,847	4,747	6,613	9,208	4,856	3,695	1,087	1,449	44,098

Economic Impact	Expenditure and Revenue £'000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	614	764	1,880	2,159	2,417	2,982	4,148	5,768	3,038	2,317	685	910	27,683
Indirect Expenditure	247	316	770	899	1,007	1,243	1,738	2,430	1,287	973	282	380	11,570
VAT	108	134	329	378	423	522	726	1,009	532	406	120	159	4,844
Total	969	1,213	2,978	3,436	3,847	4,747	6,613	9,208	4,856	3,695	1,087	1,449	44,098

Economic Impact	Categories giving rise to tourism expenditure												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	153	152	226	236	322	369	548	524	448	299	187	174	3,637
Non-Serviced Accommodation	239	234	727	1,150	1,477	1,685	2,503	3,173	2,002	1,338	348	435	15,310
SFR	101	34	39	92	59	46	74	78	40	40	31	91	725
Day Visitors	476	793	1,987	1,958	1,989	2,647	3,488	5,433	2,366	2,019	520	749	24,425
Total	969	1,213	2,978	3,436	3,847	4,747	6,613	9,208	4,856	3,695	1,087	1,449	44,098

Economic Impact	Sectors in which expenditure is made												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	84	87	158	200	258	297	662	783	564	245	110	118	3,566
Accommodation	149	170	445	520	580	708	920	1,282	655	548	157	212	6,347
Food & Drink	42	51	136	159	184	228	292	407	207	169	46	62	1,983
Recreation	270	367	911	1,017	1,101	1,385	1,802	2,628	1,277	1,076	296	414	12,544
Shopping	70	88	229	263	294	364	472	669	334	279	77	104	3,243
Transport	614	764	1,880	2,159	2,417	2,982	4,148	5,768	3,038	2,317	685	910	27,683
Total Direct Expenditure	614	764	1,880	2,159	2,417	2,982	4,148	5,768	3,038	2,317	685	910	27,683
VAT	108	134	329	378	423	522	726	1,009	532	406	120	159	4,844
Indirect Expenditure	247	316	770	899	1,007	1,243	1,738	2,430	1,287	973	282	380	11,570
Total	354	449	1,099	1,277	1,430	1,765	2,464	3,440	1,818	1,378	401	539	44,098

Population													Avg
Total Population	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432

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	181	181	197	230	252	256	264	263	257	235	185	183	224
Non-Serviced Accommodation	105	100	182	280	332	361	424	500	351	303	121	126	265
SFR	19	6	7	17	11	8	14	14	7	7	6	17	11
Day Visitors	83	139	348	343	348	464	611	952	414	354	91	131	357
Total Direct Employment	388	426	734	870	943	1,089	1,313	1,730	1,030	900	402	457	857
Indirect Employment	51	65	158	184	207	255	357	499	264	200	58	78	198
Total	439	491	892	1,054	1,149	1,344	1,669	2,229	1,294	1,099	460	535	1,055

Employment Sectors in which employment is supported													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	240	238	255	323	340	340	340	340	340	322	241	236	296
Food & Drink	46	53	138	162	180	220	286	399	204	170	49	66	164
Recreation	16	19	51	60	70	86	110	153	78	64	17	24	62
Shopping	77	104	258	288	312	393	511	745	362	305	84	117	296
Transport	10	12	32	36	41	51	66	93	46	39	11	14	38
Total Direct Employment	388	426	734	870	943	1,089	1,313	1,730	1,030	900	402	457	857
Indirect Employment	51	65	158	184	207	255	357	499	264	200	58	78	198
Total	439	491	892	1,054	1,149	1,344	1,669	2,229	1,294	1,099	460	535	1,055

Tourists		Tourists 000's												TOTAL
Tourist Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	2.4	2.4	3.6	3.8	5.2	6.0	7.4	7.2	6.1	4.8	3.0	2.8	55	
Non-Serviced Accommodation	7.5	6.1	23.0	35.5	45.4	50.9	64.5	79.3	49.2	40.4	10.4	12.3	424	
SFR	4.3	1.4	1.6	3.9	2.5	1.9	3.2	3.3	1.7	1.7	1.3	3.9	31	
Day Visitors	14.6	24.4	61.0	60.2	61.1	81.3	107.2	167.0	72.7	62.0	16.0	23.0	751	
Total Tourist Days 000's	28.9	34.4	89.3	103.3	114.2	140.1	182.3	256.8	129.7	109.0	30.7	42.0	1,261	

Tourists		Tourists 000's												TOTAL
Tourist Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	1.6	1.7	1.8	2.1	2.8	3.4	4.6	4.3	3.2	2.7	1.8	1.7	32	
Non-Serviced Accommodation	2.2	1.5	4.8	5.5	6.6	7.3	9.1	10.4	7.1	5.8	2.3	2.2	65	
SFR	1.7	0.7	0.8	1.5	1.1	0.9	1.3	1.3	0.8	0.8	0.7	1.5	13	
Day Visitors	14.6	24.4	61.0	60.2	61.1	81.3	107.2	167.0	72.7	62.0	16.0	23.0	751	
Total Tourist Numbers 000's	20.1	28.3	68.4	69.3	71.6	93.0	122.2	182.9	83.8	71.3	20.8	28.4	860	

Vehicles		Vehicles 000's												TOTAL
Vehicle Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	0.6	0.8	1.3	1.0	1.5	1.6	1.9	1.9	1.6	1.2	0.8	0.7	15	
Non-Serviced Accommodation	2.0	2.2	6.2	8.9	12.5	14.2	16.3	19.4	13.7	10.4	2.8	2.7	111	
SFR	1.4	0.5	0.5	1.2	0.8	0.6	1.0	1.0	0.5	0.5	0.4	1.2	10	
Day Visitors	3.2	6.1	15.3	13.2	13.4	20.5	23.6	36.7	16.0	15.6	4.0	5.1	173	
Total Vehicle Days 000's	7.2	9.6	23.4	24.4	28.2	36.9	42.8	59.0	31.8	27.8	8.0	9.7	309	

Vehicles		Vehicles 000's												TOTAL
Vehicle Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	0.4	0.6	0.6	0.5	0.8	0.9	1.2	1.1	0.8	0.7	0.5	0.4	9	
Non-Serviced Accommodation	0.6	0.5	1.3	1.4	1.8	2.0	2.3	2.6	2.0	1.5	0.6	0.5	17	
SFR	0.5	0.2	0.2	0.5	0.4	0.3	0.4	0.4	0.2	0.3	0.2	0.5	4	
Day Visitors	3.2	6.1	15.3	13.2	13.4	20.5	23.6	36.7	16.0	15.6	4.0	5.1	173	
Total Vehicle Numbers 000's	4.7	7.5	17.5	15.6	16.4	23.7	27.5	40.8	19.0	18.0	5.3	6.5	203	

BED STOCK (number of beds)		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	MAX
Serviced Accommodation		367	367	373	442	481	481	481	481	481	450	367	367	481
Non-Serviced Accommodation		1,436	1,136	1,980	3,172	3,262	3,262	3,262	3,262	3,262	3,252	1,440	1,241	3,262
Total BED STOCK (number of beds)		1,803	1,503	2,353	3,614	3,743	3,743	3,743	3,743	3,743	3,702	1,807	1,608	3,743

Economic Impact	Expenditure and Revenue £'000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	803	954	1,311	3,402	2,806	3,723	5,102	6,654	3,662	2,829	890	1,035	33,171
Indirect Expenditure	278	336	453	1,209	993	1,326	1,826	2,396	1,327	1,009	312	368	11,834
Total	1,081	1,290	1,765	4,610	3,799	5,049	6,928	9,051	4,989	3,838	1,203	1,403	45,005

Economic Impact	Expenditure and Revenue £'000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	683	812	1,116	2,895	2,388	3,169	4,342	5,663	3,116	2,408	758	881	28,231
Indirect Expenditure	278	336	453	1,209	993	1,326	1,826	2,396	1,327	1,009	312	368	11,834
VAT	120	142	195	507	418	555	760	991	545	421	133	154	4,940
Total	1,081	1,290	1,765	4,610	3,799	5,049	6,928	9,051	4,989	3,838	1,203	1,403	45,005

Economic Impact	Categories giving rise to tourism expenditure												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	155	171	203	310	357	362	551	492	487	304	180	148	3,720
Non-Serviced Accommodation	282	264	556	1,463	1,547	1,756	2,652	3,229	2,168	1,350	357	404	16,029
SFR	98	33	37	89	57	44	72	76	39	39	30	88	703
Day Visitors	546	822	969	2,748	1,837	2,887	3,652	5,254	2,295	2,145	635	762	24,553
Total	1,081	1,290	1,765	4,610	3,799	5,049	6,928	9,051	4,989	3,838	1,203	1,403	45,005

Economic Impact	Sectors in which expenditure is made												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	92	100	134	270	284	314	717	817	638	256	111	106	3,839
Accommodation	163	179	267	683	569	746	953	1,246	658	565	172	206	6,406
Food & Drink	46	54	81	214	186	239	302	394	208	175	51	60	2,009
Recreation	304	385	502	1,378	1,060	1,485	1,880	2,559	1,278	1,122	338	407	12,699
Shopping	78	93	133	351	289	385	490	648	335	289	86	102	3,278
Transport	683	812	1,116	2,895	2,388	3,169	4,342	5,663	3,116	2,408	758	881	28,231
Total Direct Expenditure	683	812	1,116	2,895	2,388	3,169	4,342	5,663	3,116	2,408	758	881	28,231
VAT	120	142	195	507	418	555	760	991	545	421	133	154	4,940
Indirect Expenditure	278	336	453	1,209	993	1,326	1,826	2,396	1,327	1,009	312	368	11,834
Total	397	478	649	1,716	1,411	1,880	2,586	3,387	1,873	1,431	445	522	45,005

Population													Avg
Total Population	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432	8,432

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	182	183	195	236	255	255	264	260	259	235	184	181	224
Non-Serviced Accommodation	111	105	160	329	348	376	445	541	372	311	123	123	279
SFR	19	6	7	17	11	8	14	14	7	7	6	17	11
Day Visitors	99	149	175	497	332	522	660	949	415	388	115	138	370
Total Direct Employment	410	442	537	1,079	946	1,161	1,383	1,765	1,053	941	428	459	884
Indirect Employment	59	71	96	256	210	281	387	507	281	214	66	78	209
Total	469	514	633	1,335	1,156	1,442	1,770	2,272	1,334	1,155	494	537	1,092

Employment Sectors in which employment is supported													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	240	238	255	323	340	340	340	371	340	322	241	236	299
Food & Drink	52	57	86	219	183	239	306	400	211	181	55	66	171
Recreation	18	21	31	83	72	93	118	153	81	68	20	23	65
Shopping	89	113	147	403	310	434	550	748	374	328	99	119	309
Transport	11	13	19	50	41	55	70	93	48	41	12	15	39
Total Direct Employment	410	442	537	1,079	946	1,161	1,383	1,765	1,053	941	428	459	884
Indirect Employment	59	71	96	256	210	281	387	507	281	214	66	78	209
Total	469	514	633	1,335	1,156	1,442	1,770	2,272	1,334	1,155	494	537	1,092

Tourists		Tourists 000's												TOTAL
Tourist Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	2.5	2.8	3.3	5.0	5.8	5.9	7.5	6.7	6.6	4.9	2.9	2.4	56	
Non-Serviced Accommodation	8.8	7.1	18.6	44.9	48.5	53.9	68.8	81.7	53.4	41.7	10.8	11.8	450	
SFR	4.3	1.4	1.6	3.9	2.5	1.9	3.2	3.3	1.7	1.7	1.3	3.9	31	
Day Visitors	17.3	26.1	30.7	87.1	58.2	91.5	115.8	166.5	72.8	68.0	20.1	24.2	778	
Total Tourist Days 000's	32.9	37.3	54.2	140.9	115.1	153.3	195.3	258.3	134.5	116.4	35.2	42.2	1,316	

Tourists		Tourists 000's												TOTAL
Tourist Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	1.6	1.9	1.6	2.8	3.2	3.4	4.7	4.1	3.5	2.8	1.8	1.5	33	
Non-Serviced Accommodation	2.6	1.8	3.9	7.0	7.0	7.7	9.7	10.8	7.7	6.0	2.4	2.1	69	
SFR	1.7	0.7	0.8	1.5	1.1	0.9	1.3	1.3	0.8	0.8	0.7	1.5	13	
Day Visitors	17.3	26.1	30.7	87.1	58.2	91.5	115.8	166.5	72.8	68.0	20.1	24.2	778	
Total Tourist Numbers 000's	23.3	30.4	36.9	98.4	69.6	103.5	131.5	182.7	84.8	77.6	25.0	29.3	893	

Vehicles		Vehicles 000's												TOTAL
Vehicle Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	0.6	0.9	1.2	1.3	1.6	1.6	1.9	1.7	1.7	1.3	0.8	0.6	15	
Non-Serviced Accommodation	2.3	2.5	5.0	11.4	13.5	15.0	17.3	19.9	14.9	10.8	2.9	2.6	118	
SFR	1.4	0.5	0.5	1.2	0.8	0.6	1.0	1.0	0.5	0.5	0.4	1.2	10	
Day Visitors	3.8	6.6	7.7	19.2	12.8	23.0	25.5	36.6	16.0	17.1	5.1	5.3	179	
Total Vehicle Days 000's	8.1	10.5	14.4	33.1	28.7	40.3	45.7	59.3	33.1	29.7	9.1	9.8	322	

Vehicles		Vehicles 000's												TOTAL
Vehicle Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	0.4	0.7	0.6	0.7	0.9	0.9	1.2	1.1	0.9	0.7	0.5	0.4	9	
Non-Serviced Accommodation	0.7	0.6	1.0	1.8	2.0	2.1	2.4	2.6	2.2	1.5	0.6	0.5	18	
SFR	0.5	0.2	0.2	0.5	0.4	0.3	0.4	0.4	0.2	0.3	0.2	0.5	4	
Day Visitors	3.8	6.6	7.7	19.2	12.8	23.0	25.5	36.6	16.0	17.1	5.1	5.3	179	
Total Vehicle Numbers 000's	5.4	8.0	9.6	22.1	16.0	26.4	29.5	40.7	19.3	19.6	6.4	6.6	210	

BED STOCK (number of beds)		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	MAX
Serviced Accommodation		367	367	373	442	481	481	481	481	481	450	367	367	481
Non-Serviced Accommodation		1,436	1,136	1,980	3,172	3,262	3,262	3,262	3,262	3,262	3,252	1,440	1,241	3,262
Total BED STOCK (number of beds)		1,803	1,503	2,353	3,614	3,743	3,743	3,743	3,743	3,743	3,702	1,807	1,608	3,743

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 items of expenditure recorded by STEAM: 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, Self-Catering, and Touring/Camping
Day visitors: tourist day visits	STEAM defines a tourist day visit as one which crosses a boundary into an area for a period of at least three hours for non-routine purposes
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 and staying at a non-resident address
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, 26-50 Room Hotels, <26 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 Wales on behalf Wales Tourist Board 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.

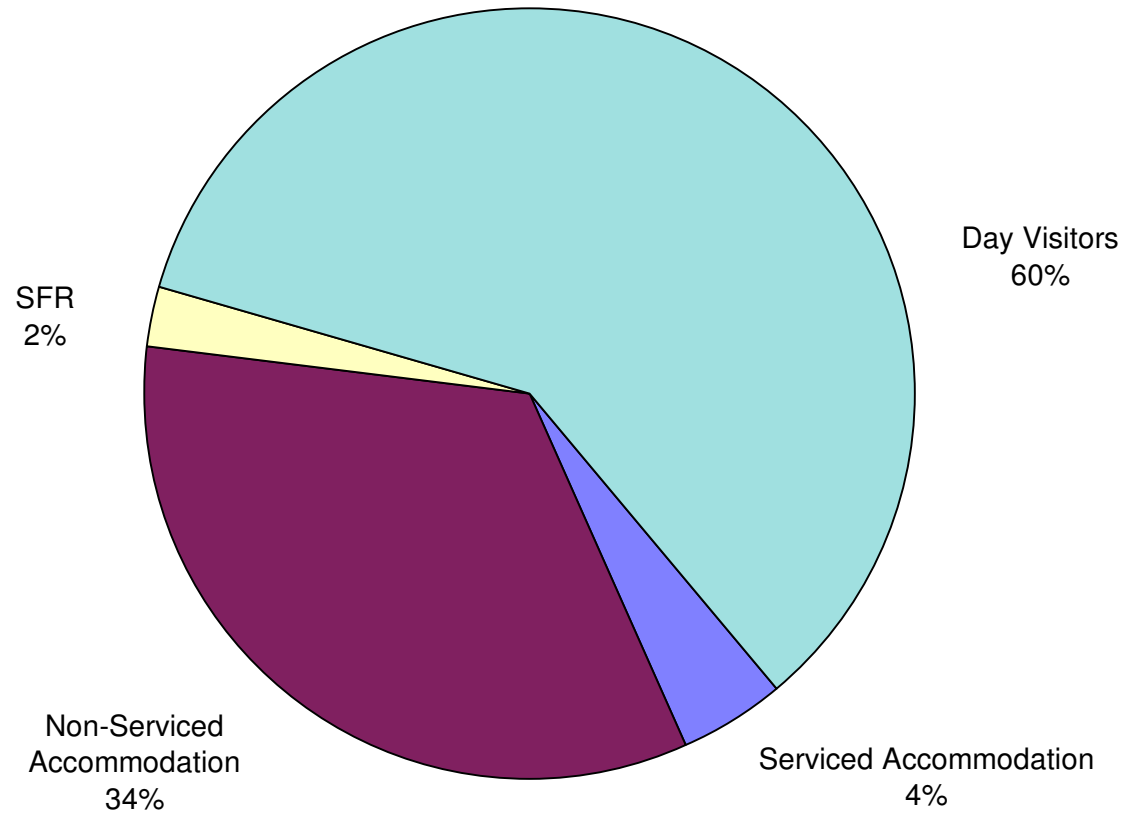
By way of comparison, the 95% confidence level sampling errors in the 2004 International Passenger Survey were +/- 3.1% for expenditure, +/- 3.0% for tourist numbers and +/- 4.6% for tourist nights. This is at a UK level – at infra-national and regional levels these errors would be higher.

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

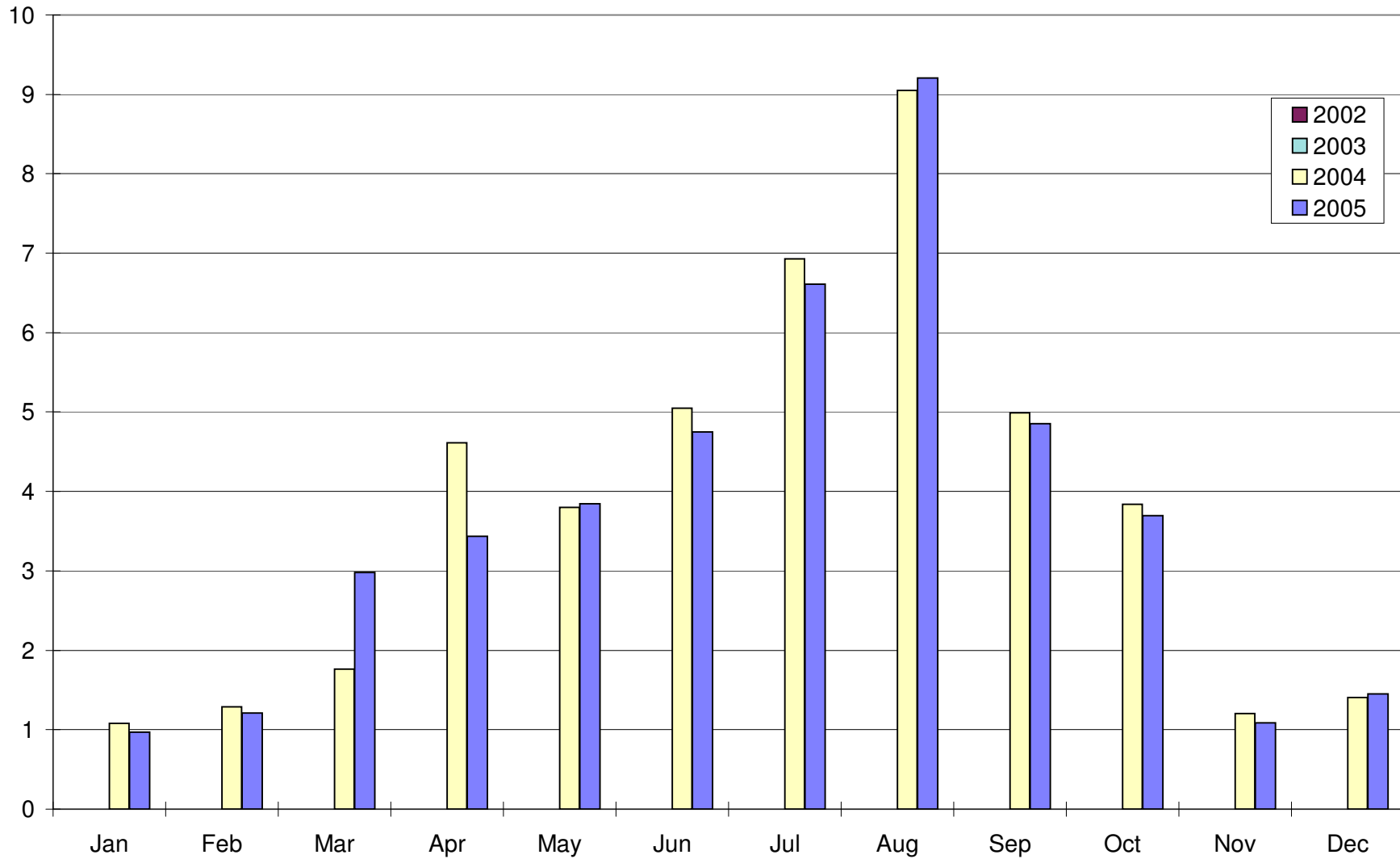
² Caused by unusual or eccentric events

³ Sir Ronald Aylmer Fisher (1890 – 1967)

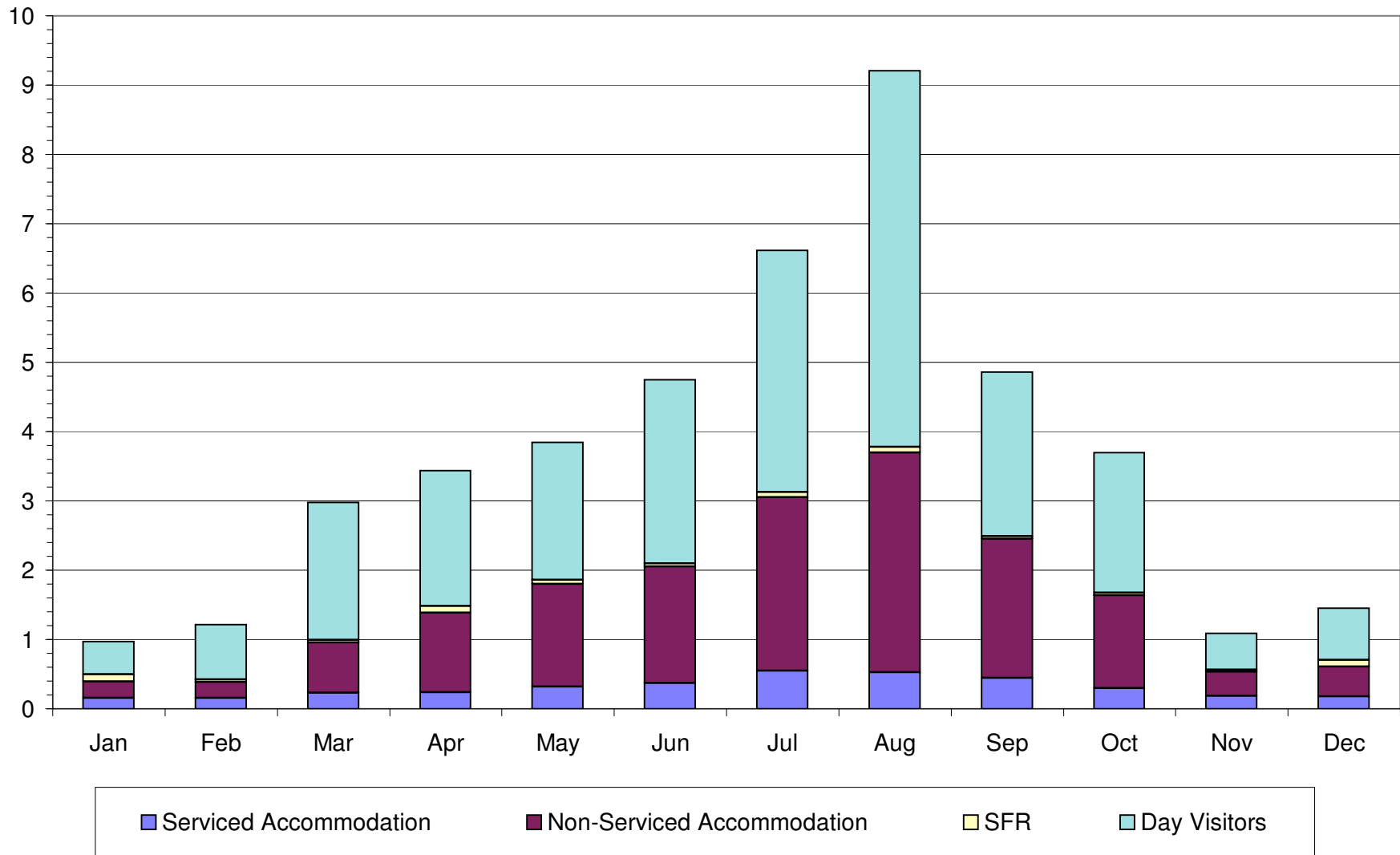
1.3 MILLION TOURIST DAYS : 2005 : BY TYPE OF TOURIST



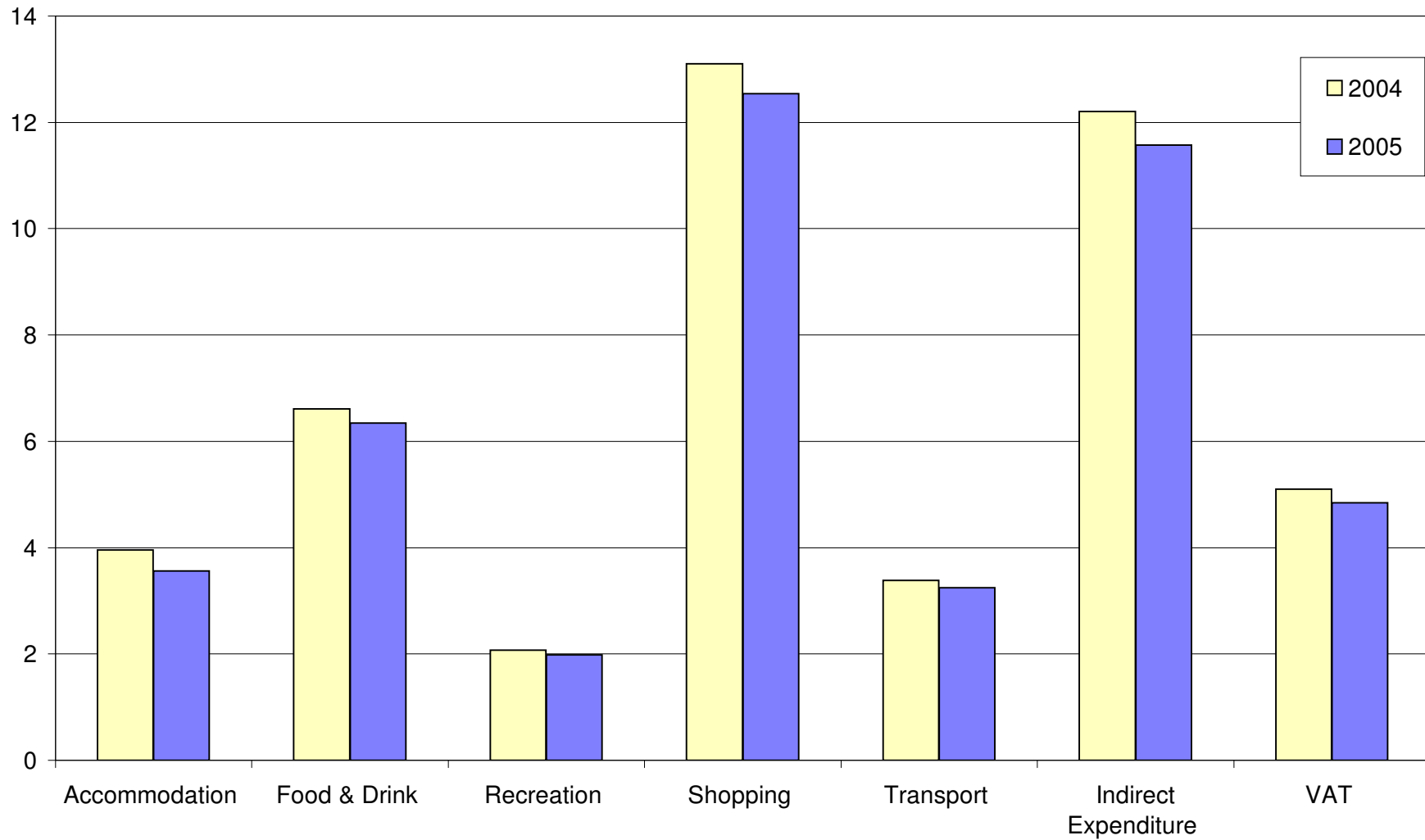
TOURISM EXPENDITURE 2004-2005: BY MONTH (£M's)



TOURISM EXPENDITURE 2005 : BY TYPE OF TOURIST : BY MONTH (£M's)



**TOURISM EXPENDITURE : BY INDUSTRY SECTOR
2005 COMPARED WITH 2004 (£M's)**



ANNUAL TOURISM EXPENDITURE (£M's)

