



MORAY

STEAM REPORT 2008

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CONTENTS

OVERVIEW OF STEAM	Pages 1-6
1. NUMERIC EXECUTIVE SUMMARY	1 page
2. EXPENDITURE (All £'s 2008 indexed):	
Direct and Indirect	C.T.Pgs 1-2
Analysis by Sector of Expenditure	C.T.Pgs 3-6
Analysis by Category of Tourism	C.T.Pgs 7-9
3. TOURIST DAYS AND NUMBERS:	
Tourist Days	C.T.Pgs 10-12
Tourist Numbers	C.T.Pgs 13-15
4. TOURIST TRAFFIC:	
Vehicle Numbers	C.T.Pg 16
Vehicle Days	C.T.Pg 16
APPENDICES:	
Appendix 1 2008	
Economic Impact (£'s 2008 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 2007	
Economic Impact (£'s 2007 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 Impact in STEAM	Page 6.1-6.2
Appendix 7	
Statistical Confidence Levels in STEAM	Page 7.1

CONTENTS Continued.....

CHARTS:

Tourist Days	Chart 1
Tourism Expenditure 2005 to 2008 : By Month	Chart 2
Tourism Expenditure 2008 : By Type of Tourist : By Month	Chart 3
Tourism Expenditure : By Industry Sector : 2008 Compared 2007	Chart 4
Annual Tourism Expenditure	Chart 5

Acknowledgement:

The present Scottish Tourism Economic Activity Monitor initiative of the Scottish Tourist Board is building upon the development work undertaken between 1995 and 1997 by Scottish Enterprise



OVERVIEW OF STEAM

1. INTRODUCTION

The Scottish 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.

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MORAY

**STEAM Report 2008
Numeric Executive Summary**

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

Issued 11 September 2009

Analysis by Sector of Expenditure (£'s millions)	2008	2007	% change
Accommodation	21.96	20.78	6
Food & Drink	14.69	14.06	4
Recreation	6.37	6.26	2
Shopping	8.43	8.35	1
Transport	17.54	17.67	-1
Indirect Expenditure	25.37	24.70	3
VAT	12.08	11.75	3
TOTAL	106.45	103.57	3

Revenue by Category of Visitor (£'s millions)	2008	2007	% change
Serviced Accommodation	55.43	51.87	7
Non-Serviced Accommodation	28.93	29.55	-2
SFR	11.37	11.22	1
Day Visitors	10.73	10.93	-2
TOTAL	106.45	103.57	3

Tourist Days (Thousands)	2008	2007	% change
Serviced Accommodation	589.18	548.56	7
Non-Serviced Accommodation	802.30	850.22	-6
SFR	494.36	492.60	0
Day Visitors	253.23	259.35	-2
TOTAL	2,139.07	2,150.72	-1

Tourist Numbers (Thousands)	2008	2007	% change
Serviced Accommodation	283.93	280.93	1
Non-Serviced Accommodation	107.92	111.74	-3
SFR	109.46	108.26	1
Day Visitors	253.23	259.35	-2
TOTAL	754.54	760.28	-1

Sectors in which Employment is supported (FTE's)	2008	2007	% change
Direct Employment			
Accommodation	2,062	2,034	1
Food & Drink	380	364	4
Recreation	164	161	2
Shopping	210	208	1
Transport	389	392	-1
Total Direct Employment	3,205	3,159	1
Indirect Employment	531	517	3
TOTAL	3,735	3,675	2

2 EXPENDITURE

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

2.1 DIRECT Vs INDIRECT (£000's)

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		6,585	4,008	64
Indirect Expenditure		1,912	1,208	58
TOTAL		8,497	5,216	63
Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		5,363	4,317	24
Indirect Expenditure		1,604	1,300	23
TOTAL		6,966	5,617	24
Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		6,063	5,799	5
Indirect Expenditure		1,835	1,718	7
TOTAL		7,898	7,517	5
Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		5,147	5,553	-7
Indirect Expenditure		1,635	1,753	-7
TOTAL		6,782	7,307	-7
Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		7,219	6,853	5
Indirect Expenditure		2,289	2,158	6
TOTAL		9,509	9,010	6
Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		8,145	7,840	4
Indirect Expenditure		2,610	2,468	6
TOTAL		10,755	10,307	4
Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		10,755	12,011	-10
Indirect Expenditure		3,457	3,825	-10
TOTAL		14,212	15,836	-10

2.1 DIRECT Vs INDIRECT (£000's)

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		11,841	12,073	-2
Indirect Expenditure		3,757	3,840	-2
TOTAL		15,597	15,913	-2
Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		6,455	7,413	-13
Indirect Expenditure		2,050	2,331	-12
TOTAL		8,505	9,744	-13
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		6,057	5,628	8
Indirect Expenditure		1,970	1,843	7
TOTAL		8,027	7,471	7
Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		4,034	3,770	7
Indirect Expenditure		1,198	1,139	5
TOTAL		5,232	4,909	7
Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		3,416	3,605	-5
Indirect Expenditure		1,055	1,122	-6
TOTAL		4,471	4,727	-5
Cumulative to December		<u>2008</u>	<u>2007</u>	<u>% change</u>
Direct Expenditure		81,080	78,870	3
Indirect Expenditure		25,372	24,703	3
TOTAL		106,452	103,573	3

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

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		1,265	668	89
Food & Drink		1,487	954	56
Recreation		551	401	37
Shopping		759	498	53
Transport		1,542	890	73
Indirect Expenditure		1,912	1,208	58
VAT		981	597	64
TOTAL		8,497	5,216	63

Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		1,094	825	33
Food & Drink		1,215	1,006	21
Recreation		531	462	15
Shopping		598	496	21
Transport		1,126	885	27
Indirect Expenditure		1,604	1,300	23
VAT		799	643	24
TOTAL		6,966	5,617	24

Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		1,173	1,116	5
Food & Drink		1,406	1,346	4
Recreation		636	600	6
Shopping		692	658	5
Transport		1,254	1,217	3
Indirect Expenditure		1,835	1,718	7
VAT		903	864	5
TOTAL		7,898	7,517	5

Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		1,433	1,494	-4
Food & Drink		947	1,027	-8
Recreation		367	402	-9
Shopping		512	561	-9
Transport		1,122	1,242	-10
Indirect Expenditure		1,635	1,753	-7
VAT		767	827	-7
TOTAL		6,782	7,307	-7

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

Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		1,956	1,752	12
Food & Drink		1,275	1,221	4
Recreation		501	486	3
Shopping		726	704	3
Transport		1,685	1,670	1
Indirect Expenditure		2,289	2,158	6
VAT		1,075	1,021	5
TOTAL		9,509	9,010	6

Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		2,156	1,957	10
Food & Drink		1,364	1,327	3
Recreation		565	548	3
Shopping		798	782	2
Transport		2,048	2,058	-0
Indirect Expenditure		2,610	2,468	6
VAT		1,213	1,168	4
TOTAL		10,755	10,307	4

Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		3,518	3,867	-9
Food & Drink		1,529	1,660	-8
Recreation		769	834	-8
Shopping		1,080	1,213	-11
Transport		2,257	2,647	-15
Indirect Expenditure		3,457	3,825	-10
VAT		1,602	1,789	-10
TOTAL		14,212	15,836	-10

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		3,854	3,862	-0
Food & Drink		1,766	1,771	-0
Recreation		819	846	-3
Shopping		1,156	1,203	-4
Transport		2,483	2,593	-4
Indirect Expenditure		3,757	3,840	-2
VAT		1,764	1,798	-2
TOTAL		15,597	15,913	-2

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

Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		1,953	2,067	-5
Food & Drink		1,093	1,228	-11
Recreation		469	546	-14
Shopping		631	758	-17
Transport		1,347	1,710	-21
Indirect Expenditure		2,050	2,331	-12
VAT		961	1,104	-13
TOTAL		8,505	9,744	-13

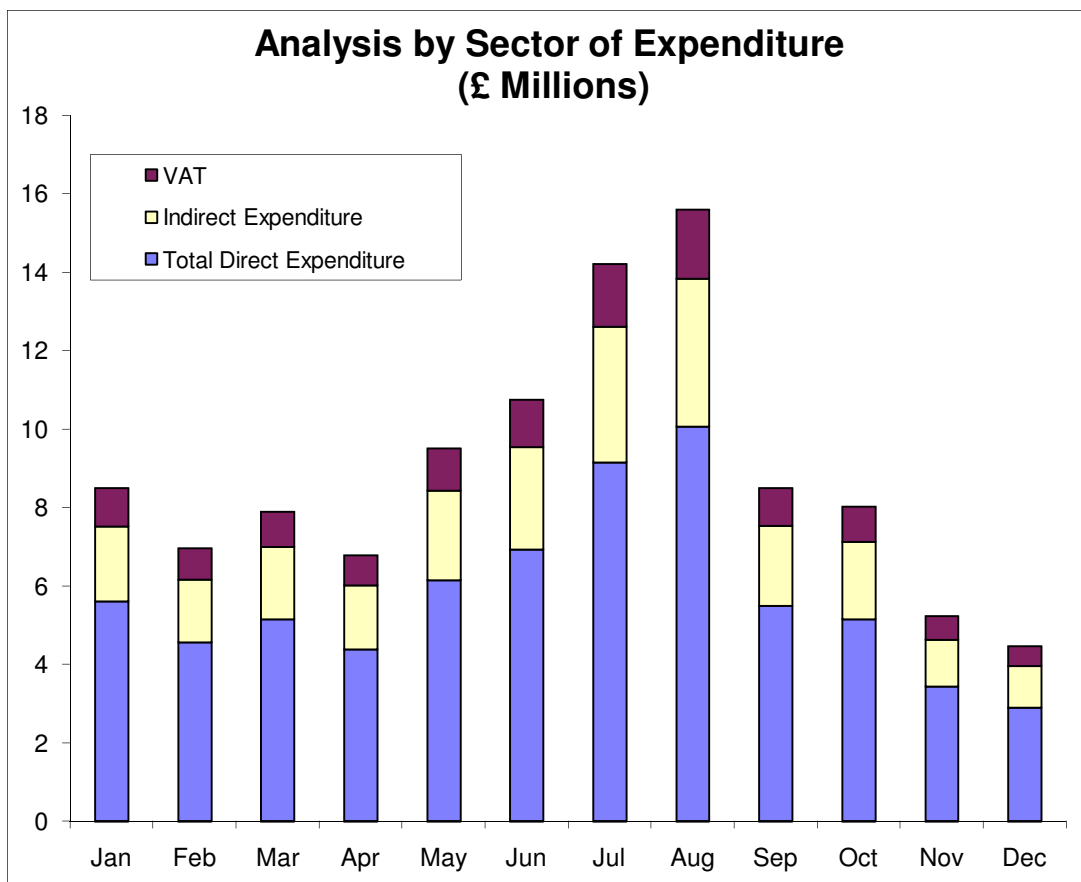
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		1,728	1,417	22
Food & Drink		1,098	1,005	9
Recreation		513	489	5
Shopping		615	598	3
Transport		1,201	1,281	-6
Indirect Expenditure		1,970	1,843	7
VAT		902	838	8
TOTAL		8,027	7,471	7

Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		1,091	970	12
Food & Drink		798	763	5
Recreation		366	347	6
Shopping		422	409	3
Transport		756	720	5
Indirect Expenditure		1,198	1,139	5
VAT		601	562	7
TOTAL		5,232	4,909	7

Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Accommodation		743	784	-5
Food & Drink		715	753	-5
Recreation		285	300	-5
Shopping		444	469	-5
Transport		720	760	-5
Indirect Expenditure		1,055	1,122	-6
VAT		509	537	-5
TOTAL		4,471	4,727	-5

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

Cumulative to December	2008	2007	% change
Accommodation	21,965	20,780	6
Food & Drink	14,693	14,062	4
Recreation	6,372	6,260	2
Shopping	8,435	8,347	1
Transport	17,539	17,673	-1
Indirect Expenditure	25,372	24,703	3
VAT	12,076	11,747	3
TOTAL	106,452	103,573	3



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

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		5,751	2,820	104
Non-Serviced Accommodation		465	344	35
SFR		1,168	933	25
Day Visitors		1,112	1,119	-1
TOTAL		8,497	5,216	63

Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		4,311	3,257	32
Non-Serviced Accommodation		620	424	46
SFR		622	563	10
Day Visitors		1,413	1,373	3
TOTAL		6,966	5,617	24

Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		4,561	4,681	-3
Non-Serviced Accommodation		731	417	75
SFR		732	697	5
Day Visitors		1,873	1,722	9
TOTAL		7,898	7,517	5

Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		3,317	3,610	-8
Non-Serviced Accommodation		1,986	2,086	-5
SFR		1,097	1,144	-4
Day Visitors		381	467	-18
TOTAL		6,782	7,307	-7

Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		4,547	4,275	6
Non-Serviced Accommodation		3,055	2,811	9
SFR		921	915	1
Day Visitors		986	1,010	-2
TOTAL		9,509	9,010	6

Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		4,695	4,741	-1
Non-Serviced Accommodation		4,028	3,541	14
SFR		1,293	1,275	1
Day Visitors		740	750	-1
TOTAL		10,755	10,307	4

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

Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		6,444	7,309	-12
Non-Serviced Accommodation		5,619	6,281	-11
SFR		895	935	-4
Day Visitors		1,254	1,311	-4
TOTAL		14,212	15,836	-10

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		7,518	7,379	2
Non-Serviced Accommodation		5,512	5,833	-6
SFR		1,589	1,623	-2
Day Visitors		979	1,078	-9
TOTAL		15,597	15,913	-2

Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		4,676	5,265	-11
Non-Serviced Accommodation		2,860	3,436	-17
SFR		615	659	-7
Day Visitors		355	384	-8
TOTAL		8,505	9,744	-13

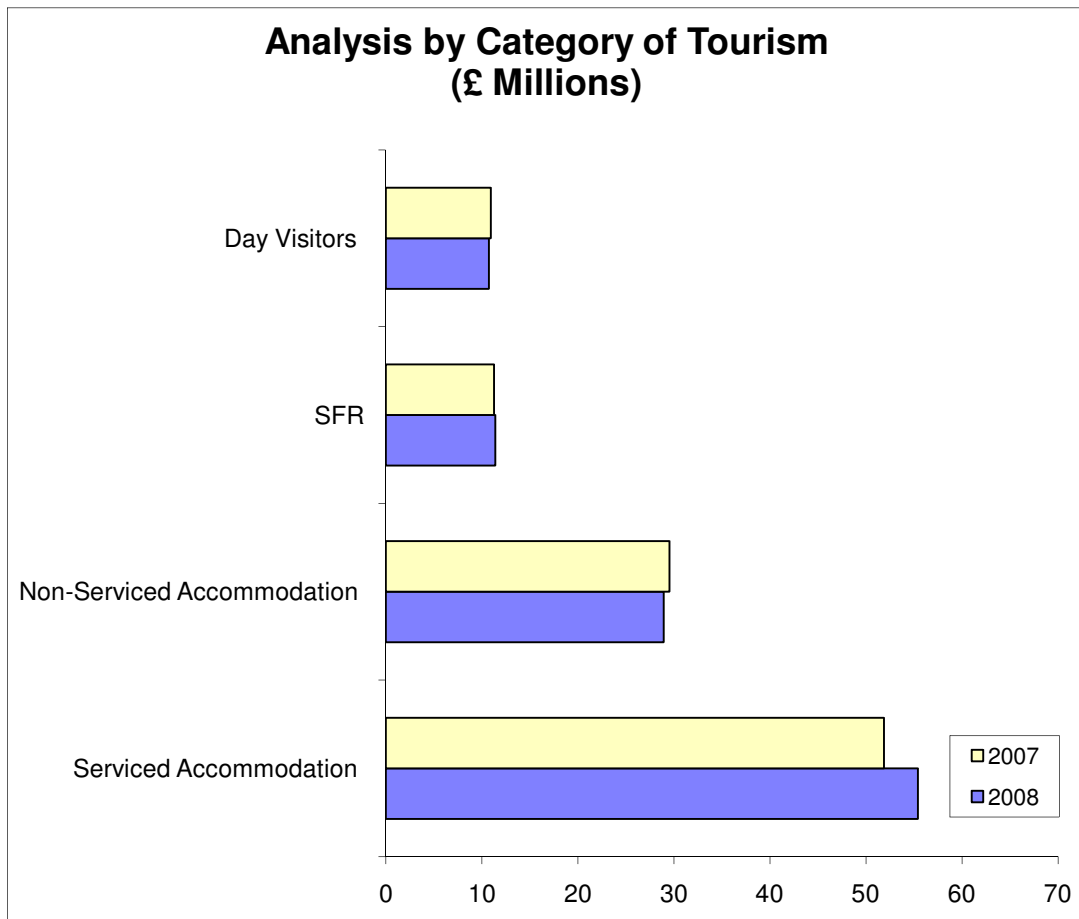
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		3,991	3,272	22
Non-Serviced Accommodation		2,815	2,933	-4
SFR		586	587	-0
Day Visitors		635	680	-7
TOTAL		8,027	7,471	7

Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		3,457	3,031	14
Non-Serviced Accommodation		597	670	-11
SFR		558	542	3
Day Visitors		620	666	-7
TOTAL		5,232	4,909	7

Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		2,158	2,227	-3
Non-Serviced Accommodation		642	778	-17
SFR		1,290	1,347	-4
Day Visitors		381	375	2
TOTAL		4,471	4,727	-5

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

Cumulative to December	2008	2007	% change
Serviced Accommodation	55,426	51,866	7
Non-Serviced Accommodation	28,931	29,553	-2
SFR	11,366	11,220	1
Day Visitors	10,729	10,934	-2
TOTAL	106,452	103,573	3



3 TOURIST DAYS AND NUMBERS

3.1 TOURIST DAYS (000's)

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		44.63	22.03	103
Non-Serviced Accommodation		14.45	11.65	24
SFR		39.86	31.84	25
Day Visitors		23.20	23.34	-1
TOTAL		122.13	88.86	37

Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		38.38	29.26	31
Non-Serviced Accommodation		19.26	14.35	34
SFR		21.22	19.21	10
Day Visitors		29.49	28.67	3
TOTAL		108.36	91.50	18

Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		40.14	41.17	-3
Non-Serviced Accommodation		22.70	14.13	61
SFR		24.98	23.79	5
Day Visitors		39.10	35.93	9
TOTAL		126.92	115.03	10

Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		40.05	44.35	-10
Non-Serviced Accommodation		58.99	65.80	-10
SFR		38.11	39.72	-4
Day Visitors		11.37	13.93	-18
TOTAL		148.52	163.80	-9

Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		57.75	55.13	5
Non-Serviced Accommodation		86.52	82.82	4
SFR		31.99	31.79	1
Day Visitors		29.37	30.09	-2
TOTAL		205.63	199.83	3

Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		60.12	58.96	2
Non-Serviced Accommodation		112.47	102.18	10
SFR		44.91	44.28	1
Day Visitors		22.04	22.35	-1
TOTAL		239.54	227.77	5

3.1 TOURIST DAYS (000's)

Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		66.84	69.12	-3
Non-Serviced Accommodation		149.30	170.73	-13
SFR		49.59	51.82	-4
Day Visitors		31.26	32.69	-4
TOTAL		296.99	324.35	-8

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		73.71	70.96	4
Non-Serviced Accommodation		146.26	158.20	-8
SFR		88.10	89.97	-2
Day Visitors		24.39	26.86	-9
TOTAL		332.46	346.00	-4

Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		55.45	60.58	-8
Non-Serviced Accommodation		85.42	108.42	-21
SFR		34.09	36.52	-7
Day Visitors		8.84	9.58	-8
TOTAL		183.80	215.11	-15

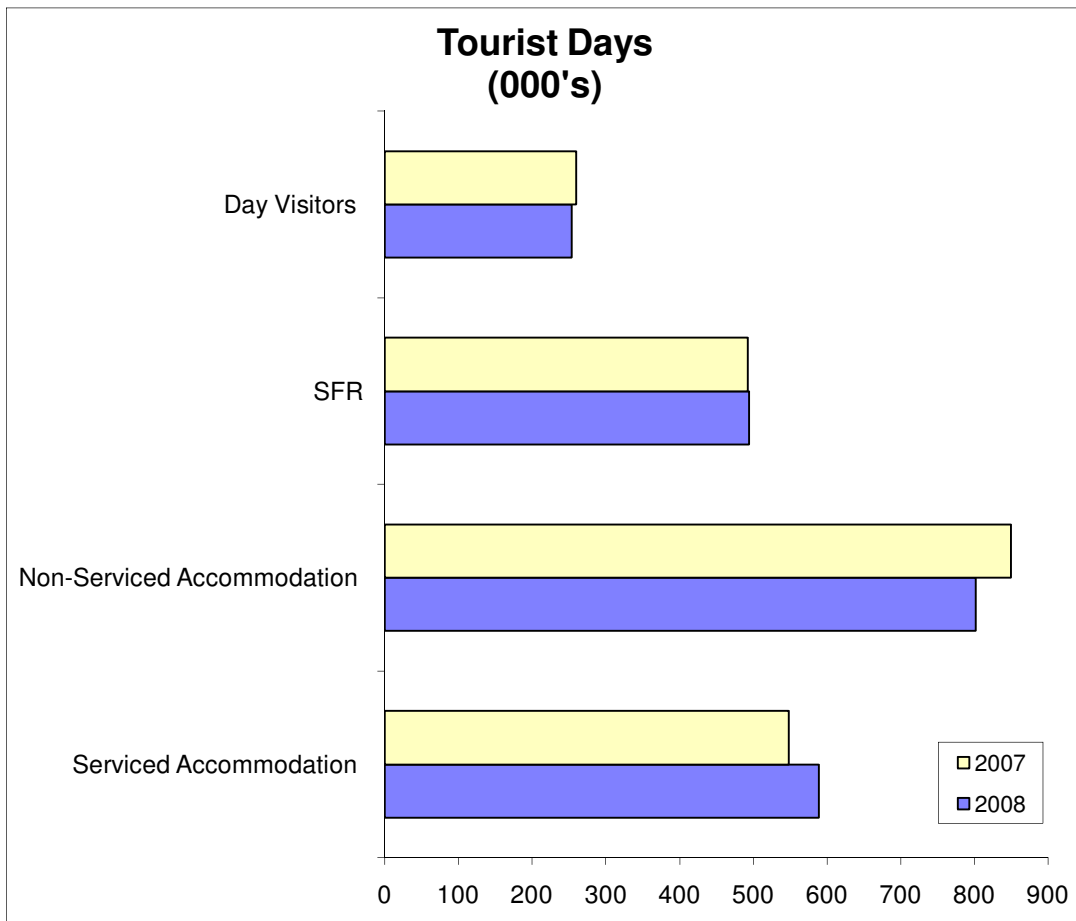
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		47.65	38.54	24
Non-Serviced Accommodation		73.94	80.41	-8
SFR		29.26	29.32	-0
Day Visitors		13.26	14.19	-7
TOTAL		164.11	162.47	1

Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		40.03	33.12	21
Non-Serviced Accommodation		15.90	19.22	-17
SFR		27.85	27.09	3
Day Visitors		12.94	13.89	-7
TOTAL		96.72	93.32	4

Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		24.42	25.32	-4
Non-Serviced Accommodation		17.09	22.30	-23
SFR		64.42	67.24	-4
Day Visitors		7.95	7.82	2
TOTAL		113.88	122.69	-7

3.1 TOURIST DAYS (000's)

Cumulative to December	2008	2007	% change
Serviced Accommodation	589.18	548.56	7
Non-Serviced Accommodation	802.30	850.22	-6
SFR	494.36	492.60	0
Day Visitors	253.23	259.35	-2
TOTAL	2,139.07	2,150.72	-1



3.2 TOURIST NUMBERS (000's)

Month of	January	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		16.16	11.83	37
Non-Serviced Accommodation		2.02	1.59	27
SFR		10.57	8.44	25
Day Visitors		23.20	23.34	-1
TOTAL		51.96	45.21	15

Month of	February	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		18.97	16.06	18
Non-Serviced Accommodation		2.65	2.23	19
SFR		6.15	5.57	10
Day Visitors		29.49	28.67	3
TOTAL		57.26	52.53	9

Month of	March	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		19.35	20.60	-6
Non-Serviced Accommodation		3.31	2.21	50
SFR		7.43	7.08	5
Day Visitors		39.10	35.93	9
TOTAL		69.20	65.82	5

Month of	April	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		19.89	21.20	-6
Non-Serviced Accommodation		8.89	9.64	-8
SFR		9.70	10.11	-4
Day Visitors		11.37	13.93	-18
TOTAL		49.84	54.88	-9

Month of	May	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		30.30	28.99	5
Non-Serviced Accommodation		12.90	12.22	6
SFR		8.08	8.03	1
Day Visitors		29.37	30.09	-2
TOTAL		80.65	79.32	2

Month of	June	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		28.74	28.97	-1
Non-Serviced Accommodation		15.60	13.41	16
SFR		8.93	8.80	1
Day Visitors		22.04	22.35	-1
TOTAL		75.31	73.53	2

3.2 TOURIST NUMBERS (000's)

Month of	July	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		33.39	37.47	-11
Non-Serviced Accommodation		19.21	20.96	-8
SFR		7.24	7.56	-4
Day Visitors		31.26	32.69	-4
TOTAL		91.10	98.68	-8

Month of	August	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		35.10	35.27	-0
Non-Serviced Accommodation		17.67	19.26	-8
SFR		13.64	13.93	-2
Day Visitors		24.39	26.86	-9
TOTAL		90.80	95.32	-5

Month of	September	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		27.71	30.22	-8
Non-Serviced Accommodation		10.40	13.51	-23
SFR		7.95	8.51	-7
Day Visitors		8.84	9.58	-8
TOTAL		54.90	61.83	-11

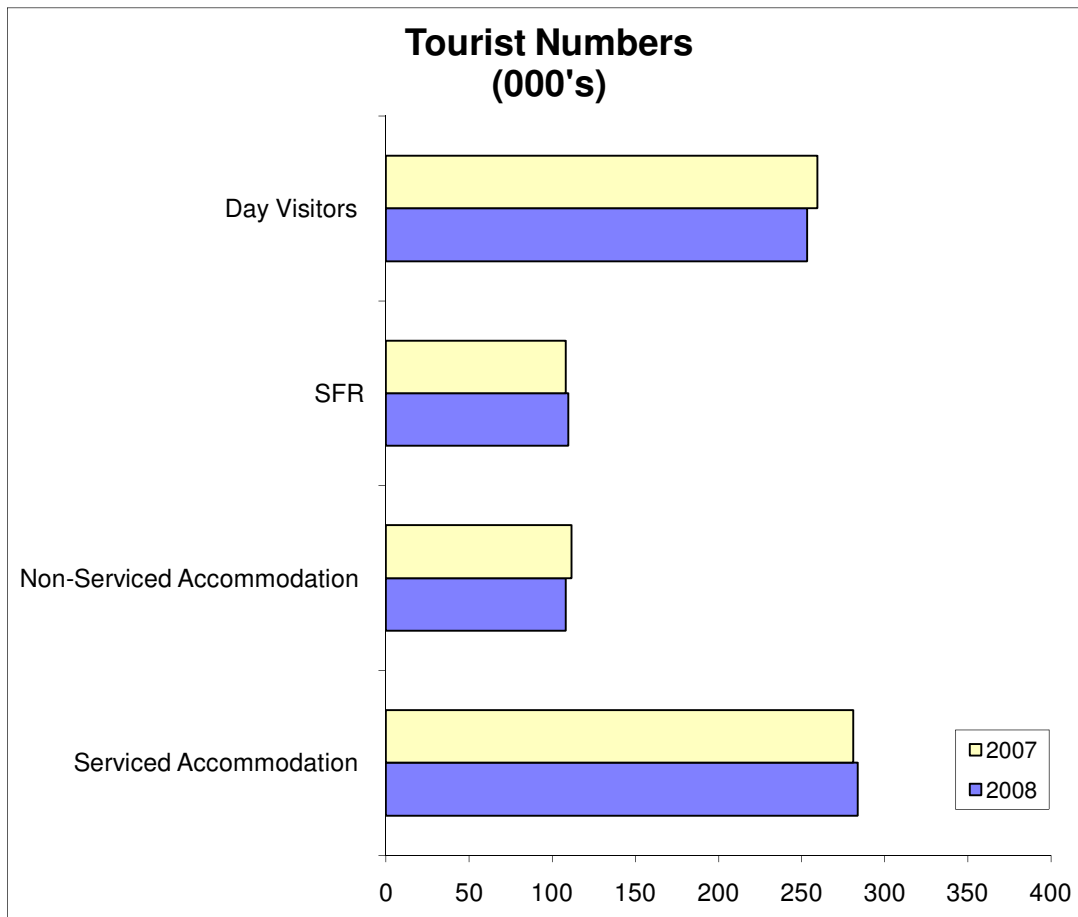
Month of	October	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		23.43	19.39	21
Non-Serviced Accommodation		10.94	11.65	-6
SFR		7.82	7.84	-0
Day Visitors		13.26	14.19	-7
TOTAL		55.45	53.07	4

Month of	November	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		17.64	16.52	7
Non-Serviced Accommodation		2.16	2.59	-16
SFR		7.55	7.34	3
Day Visitors		12.94	13.89	-7
TOTAL		40.29	40.34	-0

Month of	December	<u>2008</u>	<u>2007</u>	<u>% change</u>
Serviced Accommodation		13.26	14.42	-8
Non-Serviced Accommodation		2.15	2.48	-13
SFR		14.41	15.04	-4
Day Visitors		7.95	7.82	2
TOTAL		37.78	39.77	-5

3.2 TOURIST NUMBERS (000's)

Cumulative to December	2008	2007	% change
Serviced Accommodation	283.93	280.93	1
Non-Serviced Accommodation	107.92	111.74	-3
SFR	109.46	108.26	1
Day Visitors	253.23	259.35	-2
TOTAL	754.54	760.28	-1



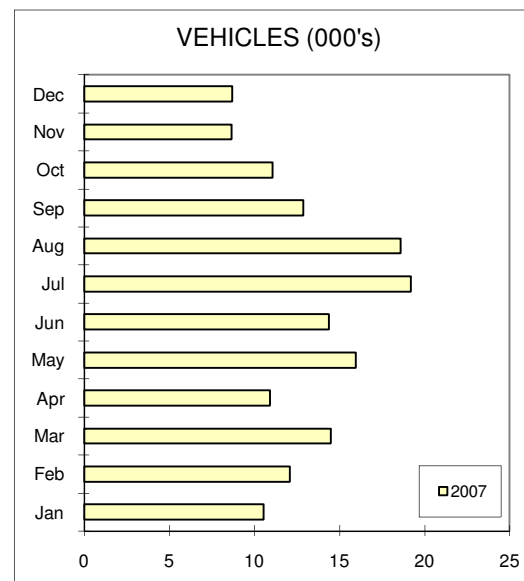
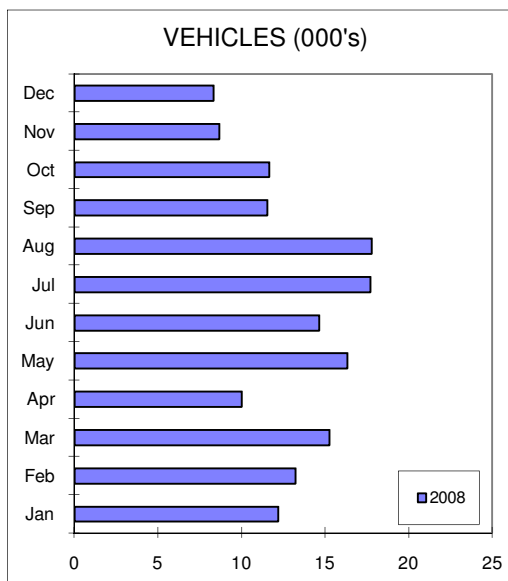
4 TOURIST TRAFFIC **2008** **2007** **% change**

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

	<u>2008</u>	<u>2007</u>	<u>% change</u>
Jan	12.17	10.53	16
Feb	13.21	12.08	9
Mar	15.26	14.48	5
Apr	9.98	10.93	-9
May	16.32	15.97	2
Jun	14.64	14.38	2
Jul	17.70	19.19	-8
Aug	17.78	18.60	-4
Sep	11.52	12.87	-10
Oct	11.64	11.08	5
Nov	8.66	8.65	0
Dec	8.31	8.70	-4
TOTAL	157.19	157.47	-0

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

VEHICLE DAYS (000's)	<u>2008</u>	<u>2007</u>	<u>% change</u>
Jan	29.08	21.35	36
Feb	24.75	20.91	18
Mar	28.46	25.74	11
Apr	29.13	31.85	-9
May	40.61	39.28	3
Jun	44.62	42.83	4
Jul	56.18	60.97	-8
Aug	63.60	65.83	-3
Sep	37.42	43.43	-14
Oct	33.47	32.90	2
Nov	20.72	19.87	4
Dec	25.12	26.84	-6
TOTAL	433.17	431.79	0



<u>Economic Impact</u>	<u>Expenditure and Revenue £'000's</u>												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	6,585	5,363	6,063	5,147	7,219	8,145	10,755	11,841	6,455	6,057	4,034	3,416	81,080
Indirect Expenditure	1,912	1,604	1,835	1,635	2,289	2,610	3,457	3,757	2,050	1,970	1,198	1,055	25,372
Total	8,497	6,966	7,898	6,782	9,509	10,755	14,212	15,597	8,505	8,027	5,232	4,471	106,452

<u>Economic Impact</u>	<u>Expenditure and Revenue £'000's</u>												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	5,604	4,564	5,160	4,381	6,144	6,932	9,153	10,077	5,494	5,155	3,433	2,908	69,004
Indirect Expenditure	1,912	1,604	1,835	1,635	2,289	2,610	3,457	3,757	2,050	1,970	1,198	1,055	25,372
VAT	981	799	903	767	1,075	1,213	1,602	1,764	961	902	601	509	12,076
Total	8,497	6,966	7,898	6,782	9,509	10,755	14,212	15,597	8,505	8,027	5,232	4,471	106,452

<u>Economic Impact</u>	<u>Categories giving rise to Tourism Expenditure</u>												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	5,751	4,311	4,561	3,317	4,547	4,695	6,444	7,518	4,676	3,991	3,457	2,158	55,426
Non-Serviced Accommodation	465	620	731	1,986	3,055	4,028	5,619	5,512	2,860	2,815	597	642	28,931
SFR	1,168	622	732	1,097	921	1,293	895	1,589	615	586	558	1,290	11,366
Day Visitors	1,112	1,413	1,873	381	986	740	1,254	979	355	635	620	381	10,729
Total	8,497	6,966	7,898	6,782	9,509	10,755	14,212	15,597	8,505	8,027	5,232	4,471	106,452

<u>Economic Impact</u>	<u>Sectors in which expenditure is made</u>												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure													
Accommodation	1,265	1,094	1,173	1,433	1,956	2,156	3,518	3,854	1,953	1,728	1,091	743	21,965
Food & Drink	1,487	1,215	1,406	947	1,275	1,364	1,529	1,766	1,093	1,098	798	715	14,693
Recreation	551	531	636	367	501	565	769	819	469	513	366	285	6,372
Shopping	759	598	692	512	726	798	1,080	1,156	631	615	422	444	8,435
Transport	1,542	1,126	1,254	1,122	1,685	2,048	2,257	2,483	1,347	1,201	756	720	17,539
Total Direct Expenditure	5,604	4,564	5,160	4,381	6,144	6,932	9,153	10,077	5,494	5,155	3,433	2,908	69,004
VAT	981	799	903	767	1,075	1,213	1,602	1,764	961	902	601	509	12,076
Indirect Expenditure	1,912	1,604	1,835	1,635	2,289	2,610	3,457	3,757	2,050	1,970	1,198	1,055	25,372
Total	8,497	6,966	7,898	6,782	9,509	10,755	14,212	15,597	8,505	8,027	5,232	4,471	106,452

Population													Avg
Total Population	86,870	86,870	86,870	86,870	86,870	86,870	86,870	86,870	86,870	86,870	86,870	86,870	86,870

Employment Supported by tourism activity in these Categories													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2,191	1,974	2,012	1,782	1,919	1,934	2,031	2,145	1,961	1,872	1,802	1,638	1,938
Non-Serviced Accommodation	619	629	660	911	1,063	1,192	1,329	1,306	1,014	1,012	642	643	918
SFR	220	117	138	208	174	245	169	301	116	110	105	243	179
Day Visitors	212	269	357	72	185	139	235	183	66	121	118	73	169
Total Direct Employment	3,243	2,989	3,167	2,972	3,341	3,510	3,763	3,935	3,158	3,116	2,667	2,597	3,205
Indirect Employment	480	402	461	410	575	655	868	943	515	494	301	265	531
Total	3,723	3,392	3,627	3,383	3,916	4,165	4,631	4,878	3,673	3,610	2,967	2,862	3,735

Employment Sectors in which employment is supported													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	1,974	1,970	1,994	2,113	2,125	2,128	2,128	2,128	2,127	2,113	1,979	1,963	2,062
Food & Drink	461	377	436	294	396	423	474	548	339	341	248	222	380
Recreation	170	164	196	113	155	174	237	252	145	158	113	88	164
Shopping	227	179	207	153	217	239	323	345	189	184	126	133	210
Transport	411	300	334	299	449	546	601	662	359	320	201	192	389
Total Direct Employment	3,243	2,989	3,167	2,972	3,341	3,510	3,763	3,935	3,158	3,116	2,667	2,597	3,205
Indirect Employment	480	402	461	410	575	655	868	943	515	494	301	265	531
Total	3,723	3,392	3,627	3,383	3,916	4,165	4,631	4,878	3,673	3,610	2,967	2,862	3,735

Tourists	Tourists 000's												
Tourist Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	44.6	38.4	40.1	40.1	57.7	60.1	66.8	73.7	55.4	47.7	40.0	24.4	589
Non-Serviced Accommodation	14.4	19.3	22.7	59.0	86.5	112.5	149.3	146.3	85.4	73.9	15.9	17.1	802
SFR	39.9	21.2	25.0	38.1	32.0	44.9	49.6	88.1	34.1	29.3	27.8	64.4	494
Day Visitors	23.2	29.5	39.1	11.4	29.4	22.0	31.3	24.4	8.8	13.3	12.9	8.0	253
Total Tourist Days 000's	122.1	108.4	126.9	148.5	205.6	239.5	297.0	332.5	183.8	164.1	96.7	113.9	2,139

Tourists	Tourists 000's												
Tourist Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	16.2	19.0	19.3	19.9	30.3	28.7	33.4	35.1	27.7	23.4	17.6	13.3	284
Non-Serviced Accommodation	2.0	2.6	3.3	8.9	12.9	15.6	19.2	17.7	10.4	10.9	2.2	2.2	108
SFR	10.6	6.2	7.4	9.7	8.1	8.9	7.2	13.6	7.9	7.8	7.5	14.4	109
Day Visitors	23.2	29.5	39.1	11.4	29.4	22.0	31.3	24.4	8.8	13.3	12.9	8.0	253
Total Tourist Numbers 000's	52.0	57.3	69.2	49.8	80.7	75.3	91.1	90.8	54.9	55.5	40.3	37.8	755

Vehicles	Vehicles 000's												
Vehicle Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	9.6	8.8	9.2	8.0	12.3	12.0	13.8	15.3	11.7	10.1	8.5	5.2	125
Non-Serviced Accommodation	3.0	3.8	5.1	10.0	16.1	18.4	26.5	26.0	15.9	13.7	3.0	3.2	145
SFR	11.2	5.4	5.8	8.9	6.4	9.7	9.9	17.6	8.0	6.8	6.5	15.0	111
Day Visitors	5.3	6.7	8.3	2.3	5.9	4.5	6.0	4.6	1.9	2.8	2.8	1.7	53
Total Vehicle Days 000's	29.1	24.8	28.5	29.1	40.6	44.6	56.2	63.6	37.4	33.5	20.7	25.1	433

Vehicles	Vehicles 000's												
Vehicle Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	3.5	4.4	4.4	3.9	6.4	5.6	6.9	7.3	5.8	5.0	3.7	2.9	60
Non-Serviced Accommodation	0.4	0.5	0.7	1.5	2.4	2.6	3.4	3.1	1.9	2.0	0.4	0.4	19
SFR	3.0	1.6	1.7	2.3	1.6	1.9	1.4	2.7	1.9	1.8	1.8	3.4	25
Day Visitors	5.3	6.7	8.3	2.3	5.9	4.5	6.0	4.6	1.9	2.8	2.8	1.7	53
Total Vehicle Numbers 000's	12.2	13.2	15.3	10.0	16.3	14.6	17.7	17.8	11.5	11.6	8.7	8.3	157

BED STOCK (number of beds)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	MAX
Serviced Accommodation	3,586	3,587	3,600	3,635	3,655	3,658	3,658	3,658	3,655	3,638	3,592	3,563	3,658
Non-Serviced Accommodation	1,740	1,728	2,385	6,989	7,006	7,021	7,021	7,021	7,021	6,827	1,905	1,740	7,021
Total BED STOCK (number of beds)	5,326	5,315	5,985	10,624	10,661	10,679	10,679	10,679	10,676	10,465	5,497	5,303	10,679

<u>Economic Impact</u>	<u>Expenditure and Revenue £'000's</u>												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	3,851	4,148	5,573	5,336	6,585	7,533	11,541	11,601	7,123	5,408	3,623	3,464	75,785
Indirect Expenditure	1,160	1,249	1,651	1,685	2,073	2,371	3,676	3,690	2,240	1,771	1,094	1,078	23,737
Total	5,012	5,397	7,223	7,021	8,658	9,904	15,217	15,290	9,363	7,179	4,717	4,542	99,523

<u>Economic Impact</u>	<u>Expenditure and Revenue £'000's</u>												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	3,278	3,531	4,743	4,542	5,604	6,411	9,822	9,873	6,062	4,603	3,083	2,948	64,498
Indirect Expenditure	1,160	1,249	1,651	1,685	2,073	2,371	3,676	3,690	2,240	1,771	1,094	1,078	23,737
VAT	574	618	830	795	981	1,122	1,719	1,728	1,061	805	540	516	11,287
Total	5,012	5,397	7,223	7,021	8,658	9,904	15,217	15,290	9,363	7,179	4,717	4,542	99,523

<u>Economic Impact</u>	<u>Categories giving rise to Tourism Expenditure</u>												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2,710	3,129	4,498	3,469	4,107	4,556	7,024	7,090	5,059	3,144	2,912	2,140	49,838
Non-Serviced Accommodation	330	407	401	2,004	2,701	3,403	6,035	5,605	3,301	2,818	644	747	28,397
SFR	896	541	670	1,099	880	1,225	898	1,560	633	564	521	1,294	10,781
Day Visitors	1,075	1,320	1,654	449	970	720	1,260	1,035	369	653	640	360	10,506
Total	5,012	5,397	7,223	7,021	8,658	9,904	15,217	15,290	9,363	7,179	4,717	4,542	99,523

<u>Economic Impact</u>	<u>Sectors in which expenditure is made</u>												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure													
Accommodation	642	793	1,072	1,436	1,683	1,881	3,716	3,711	1,986	1,361	932	754	19,967
Food & Drink	917	967	1,293	987	1,173	1,275	1,595	1,702	1,180	966	733	724	13,512
Recreation	385	444	576	387	467	527	802	812	524	470	333	289	6,016
Shopping	478	476	632	539	676	751	1,165	1,156	728	575	393	451	8,021
Transport	855	851	1,169	1,194	1,604	1,977	2,544	2,491	1,643	1,231	692	731	16,982
Total Direct Expenditure	3,278	3,531	4,743	4,542	5,604	6,411	9,822	9,873	6,062	4,603	3,083	2,948	64,498
VAT	574	618	830	795	981	1,122	1,719	1,728	1,061	805	540	516	11,287
Indirect Expenditure	1,160	1,249	1,651	1,685	2,073	2,371	3,676	3,690	2,240	1,771	1,094	1,078	23,737
Total	5,012	5,397	7,223	7,021	8,658	9,904	15,217	15,290	9,363	7,179	4,717	4,542	99,523

Population													Avg
Total Population	86,750	86,750	86,750	86,750	86,750	86,750	86,750	86,750	86,750	86,750	86,750	86,750	86,750

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	1,789	1,835	2,032	1,818	1,891	1,946	2,112	2,120	2,038	1,795	1,762	1,653	1,899
Non-Serviced Accommodation	574	578	596	904	1,028	1,134	1,408	1,331	1,095	1,033	618	626	911
SFR	176	106	132	216	173	241	177	307	125	111	102	254	177
Day Visitors	213	261	328	88	190	141	245	202	72	129	127	71	172
Total Direct Employment	2,752	2,781	3,088	3,026	3,282	3,463	3,942	3,960	3,330	3,069	2,609	2,604	3,159
Indirect Employment	303	326	431	440	541	619	960	964	585	463	286	282	517
Total	3,055	3,107	3,519	3,466	3,823	4,082	4,902	4,923	3,915	3,531	2,895	2,886	3,675

Employment Sectors in which employment is supported													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	1,946	1,943	1,964	2,085	2,098	2,100	2,102	2,099	2,098	2,086	1,952	1,935	2,034
Food & Drink	296	312	418	319	379	412	515	550	381	312	237	234	364
Recreation	124	142	185	124	150	169	257	261	168	151	107	93	161
Shopping	149	148	196	168	210	234	362	359	226	179	122	140	208
Transport	237	236	324	331	445	548	705	691	456	341	192	203	392
Total Direct Employment	2,752	2,781	3,088	3,026	3,282	3,463	3,942	3,960	3,330	3,069	2,609	2,604	3,159
Indirect Employment	303	326	431	440	541	619	960	964	585	463	286	282	517
Total	3,055	3,107	3,519	3,466	3,823	4,082	4,902	4,923	3,915	3,531	2,895	2,886	3,675

Tourists		Tourists 000's											TOTAL
Tourist Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	22.0	29.3	41.2	44.4	55.1	59.0	69.1	71.0	60.6	38.5	33.1	25.3	549
Non-Serviced Accommodation	11.7	14.4	14.1	65.8	82.8	102.2	170.7	158.2	108.4	80.4	19.2	22.3	850
SFR	31.8	19.2	23.8	39.7	31.8	44.3	51.8	90.0	36.5	29.3	27.1	67.2	493
Day Visitors	23.3	28.7	35.9	13.9	30.1	22.3	32.7	26.9	9.6	14.2	13.9	7.8	259
Total Tourist Days 000's	88.9	91.5	115.0	163.8	199.8	227.8	324.4	346.0	215.1	162.5	93.3	122.7	2,151

Tourists		Tourists 000's											TOTAL
Tourist Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	11.8	16.1	20.6	21.2	29.0	29.0	37.5	35.3	30.2	19.4	16.5	14.4	281
Non-Serviced Accommodation	1.6	2.2	2.2	9.6	12.2	13.4	21.0	19.3	13.5	11.6	2.6	2.5	112
SFR	8.4	5.6	7.1	10.1	8.0	8.8	7.6	13.9	8.5	7.8	7.3	15.0	108
Day Visitors	23.3	28.7	35.9	13.9	30.1	22.3	32.7	26.9	9.6	14.2	13.9	7.8	259
Total Tourist Numbers 000's	45.2	52.5	65.8	54.9	79.3	73.5	98.7	95.3	61.8	53.1	40.3	39.8	760

Vehicles		Vehicles 000's											TOTAL
Vehicle Days 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	4.7	6.6	9.4	8.7	11.6	11.8	14.3	14.7	12.7	8.1	7.0	5.3	115
Non-Serviced Accommodation	2.4	2.8	3.2	11.1	15.3	16.9	30.1	28.0	20.1	14.9	3.6	4.1	153
SFR	8.9	4.9	5.6	9.3	6.4	9.5	10.4	18.0	8.5	6.8	6.3	15.7	110
Day Visitors	5.3	6.6	7.7	2.8	6.0	4.6	6.2	5.1	2.0	3.0	3.0	1.7	54
Total Vehicle Days 000's	21.4	20.9	25.7	31.9	39.3	42.8	61.0	65.8	43.4	32.9	19.9	26.8	432

Vehicles		Vehicles 000's											TOTAL
Vehicle Numbers 000's	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2.5	3.7	4.7	4.2	6.1	5.7	7.8	7.3	6.3	4.1	3.5	3.1	59
Non-Serviced Accommodation	0.3	0.4	0.5	1.6	2.3	2.2	3.7	3.4	2.5	2.2	0.5	0.5	20
SFR	2.4	1.4	1.7	2.4	1.6	1.9	1.5	2.8	2.0	1.8	1.7	3.5	25
Day Visitors	5.3	6.6	7.7	2.8	6.0	4.6	6.2	5.1	2.0	3.0	3.0	1.7	54
Total Vehicle Numbers 000's	10.5	12.1	14.5	10.9	16.0	14.4	19.2	18.6	12.9	11.1	8.7	8.7	157

BED STOCK (number of beds)		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	MAX
Serviced Accommodation	3,633	3,634	3,647	3,682	3,702	3,705	3,705	3,705	3,702	3,685	3,639	3,609	3,705	
Non-Serviced Accommodation	1,726	1,714	2,251	6,605	6,637	6,637	6,637	6,637	6,637	6,448	1,897	1,726	6,637	
Total BED STOCK (number of beds)	5,359	5,348	5,898	10,287	10,339	10,342	10,342	10,342	10,339	10,133	5,536	5,335	10,342	

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, 26-50 Room Hotels, <26 Room Hotels, Guest Houses/B&Bs; Self-Catering, Touring/Camping) or as 'Day Visitors' or 'SFRs'
Commercial accommodation	denotes +50 Room Hotels, 26-50 Room Hotels, <26 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	Scottish 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 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.

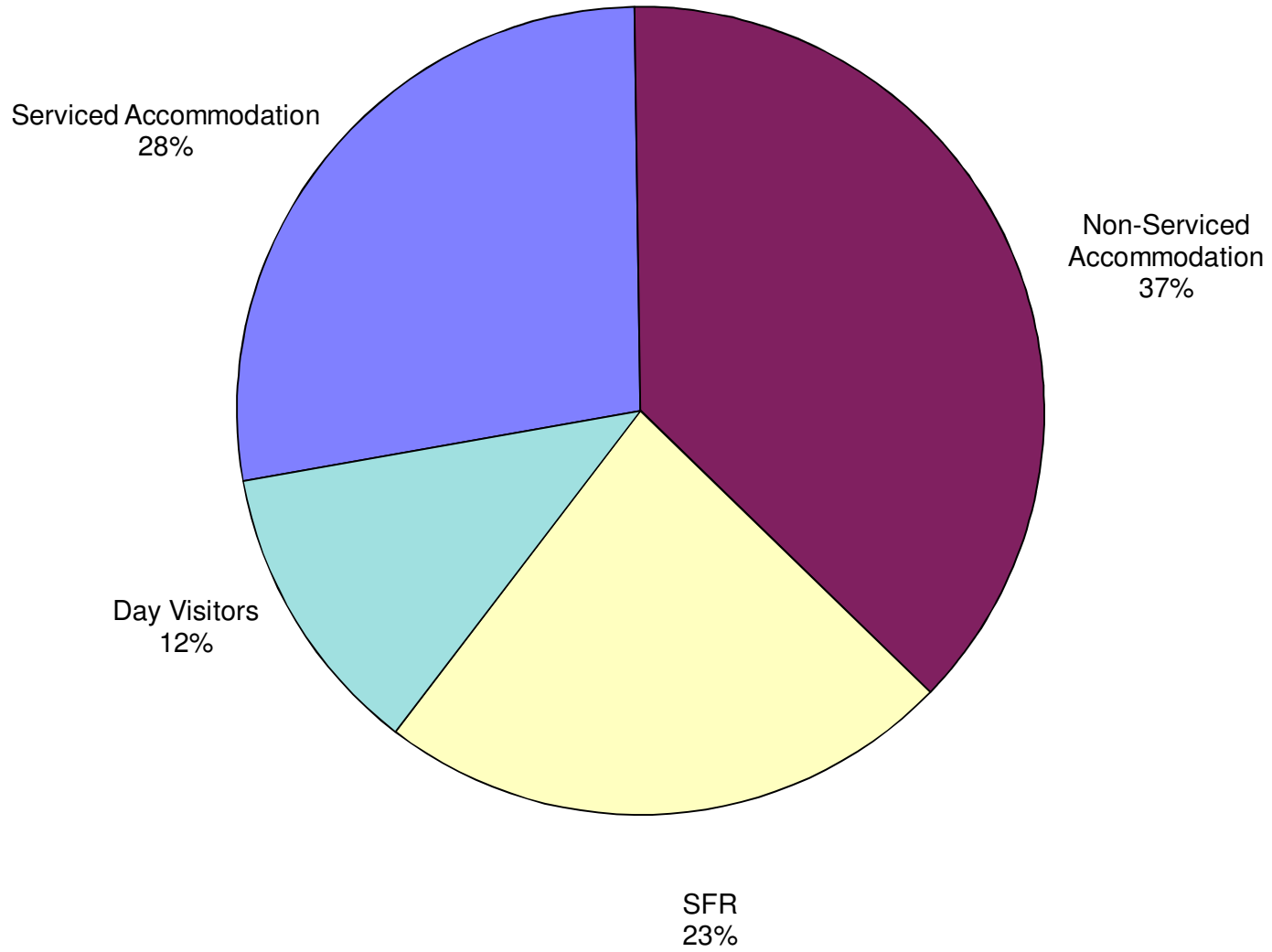
By way of comparison, the 95% confidence level sampling errors in the 2004 International Passenger Survey were +/- 3.1% for expenditure, +/- 3.0% for tourist numbers and +/- 4.6% for tourist nights. This is at a UK level – at infra-national and regional levels these errors would be higher.

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

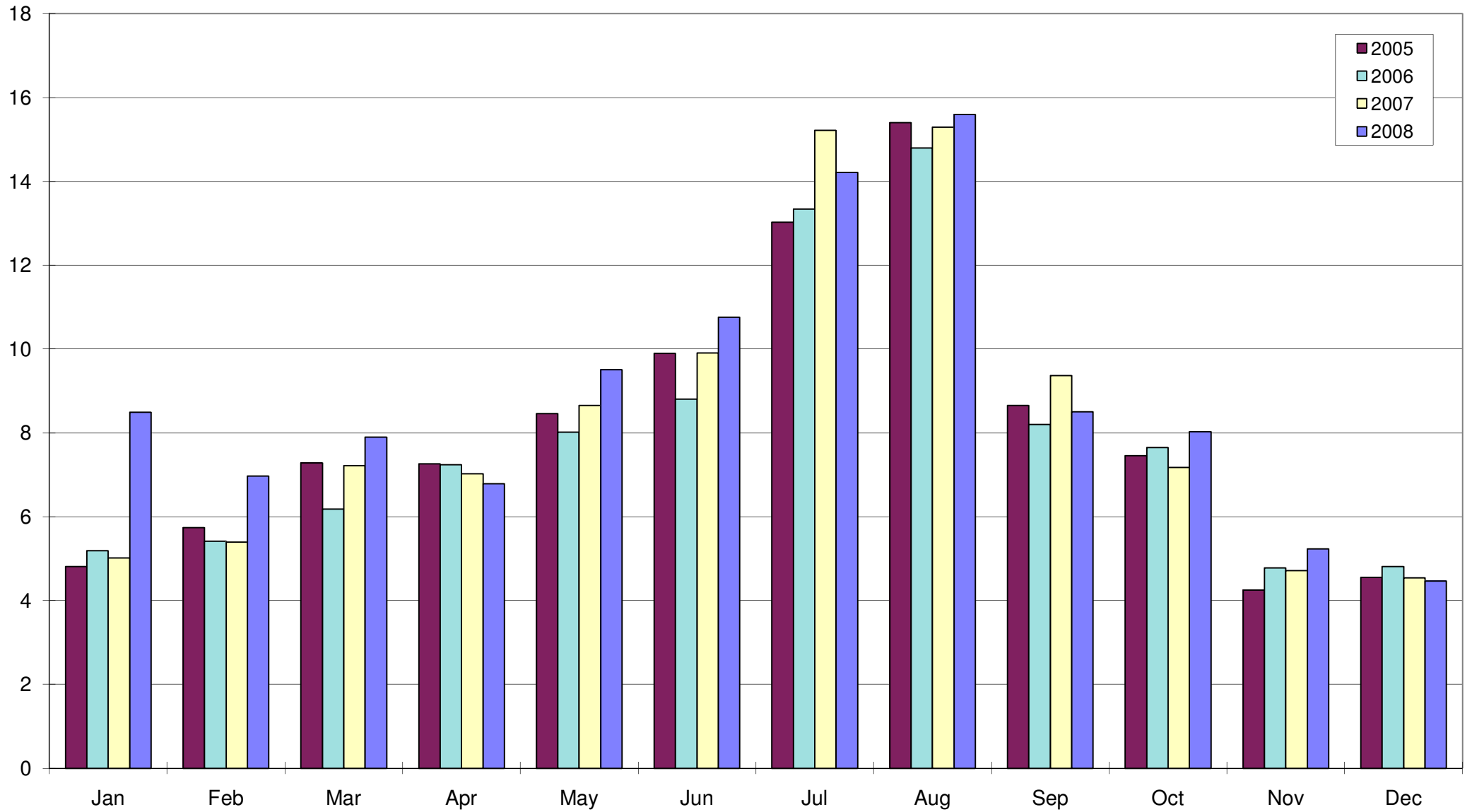
² Caused by unusual or eccentric events

³ Sir Ronald Aylmer Fisher (1890 – 1967)

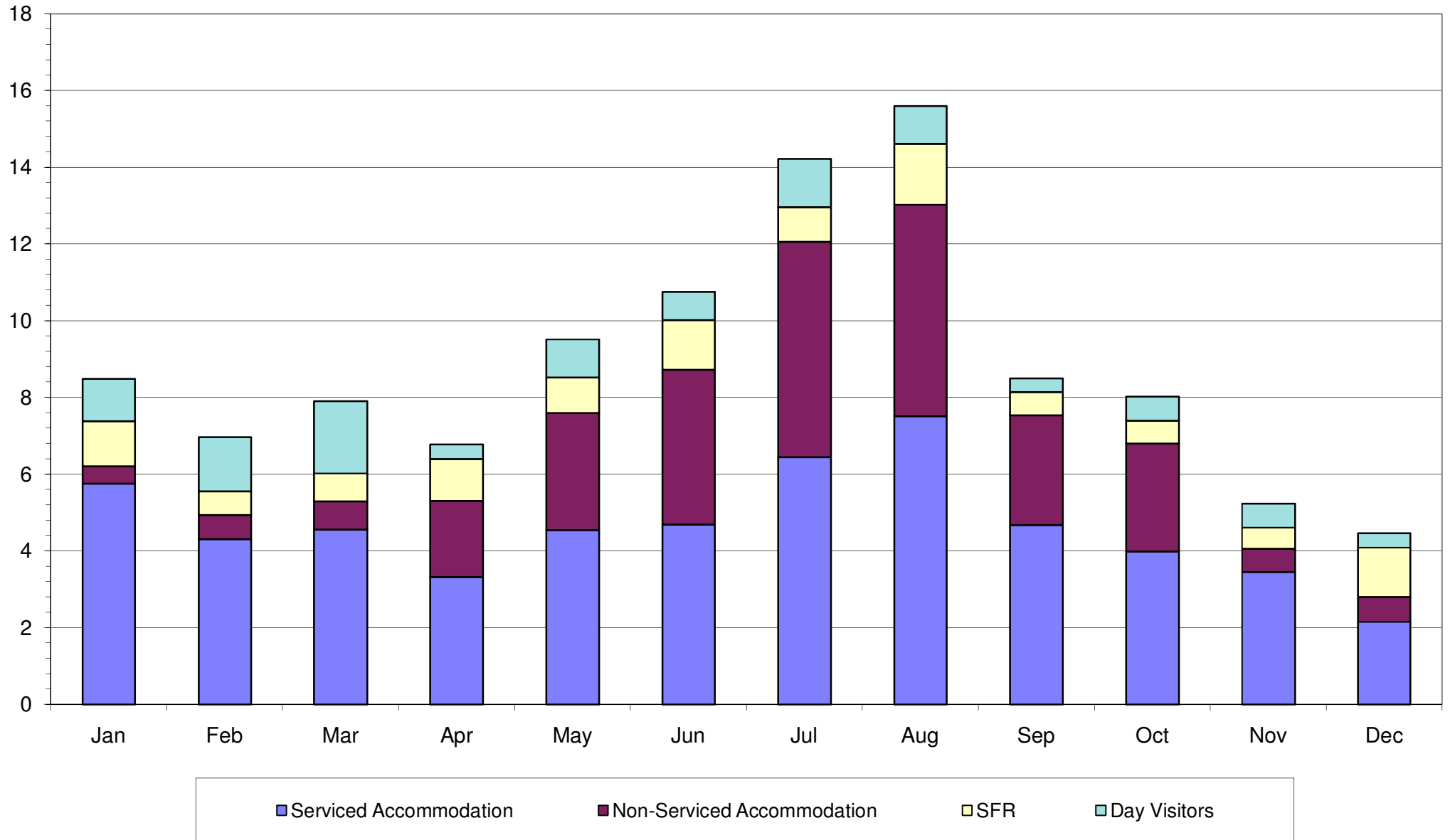
2.1 MILLION TOURIST DAYS : 2008 : BY TYPE OF TOURIST



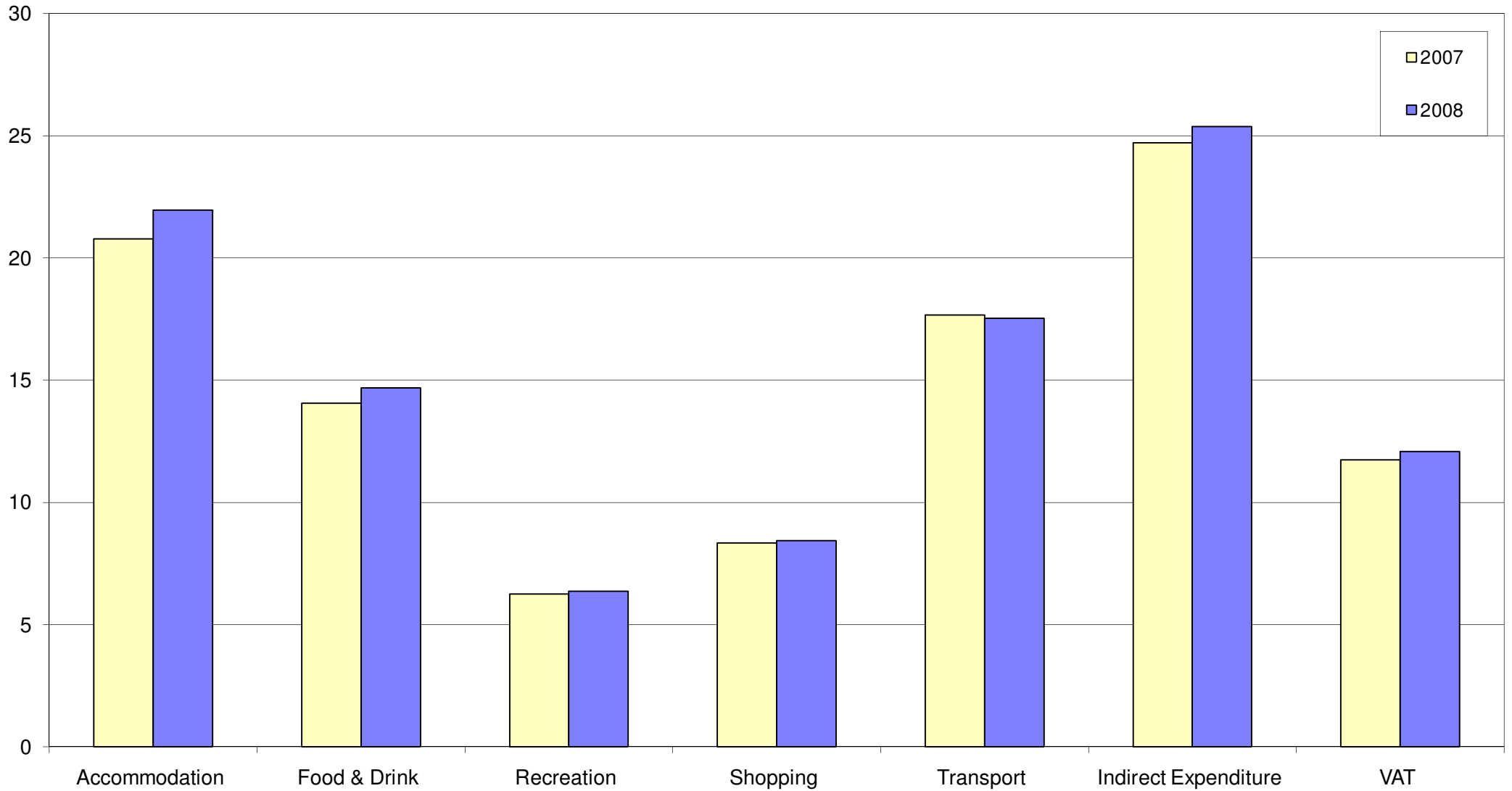
TOURISM EXPENDITURE : 2005 - 2008 : BY MONTH (£M's)



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



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



ANNUAL TOURISM EXPENDITURE (£M's)

