

**NORTH WALES**

**STEAM REPORT 2007**

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## OVERVIEW OF STEAM

### 1. INTRODUCTION

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

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

### 2. VALIDATION OF STEAM

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

### **3. A BRIEF OUTLINE OF STEAM**

#### **3.1 STEAM - The Model**

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

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

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

## 3.2 The STEAM Outputs

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

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

## 3.3 STEAM Inputs

At a minimum, the implementation of STEAM depends on:

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

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

### a) **Bed Stocks**

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

### b) **Number of Establishments**

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

### c) **Use of Tourist Accommodation**

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

### d) **Tourist Accommodation: Employment**

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

### e) **Staying with Friends and Relatives**

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

**f) Day Visitors**

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

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

**g) Rates of Daily Expenditure**

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

**h) Economic Multipliers**

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

**i) Indexing**

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

**j) Benchmarking**

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

## **4. STEAM REPORT FORMAT**

### **4.1 Introduction**

Each STEAM Report consists of four main sections:

- Numeric Executive Summary
- Comparison Tables
- Appendices
- Charts

### **4.2 Numeric Executive Summary (NES)**

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

**a) Analysis by Sector of Expenditure**

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

**b) Revenue by Category of Expenditure**

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

**c) Tourist Days**

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

**d) Tourist Numbers**

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

**e) Sectors in which Employment is Supported**

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

### **4.3 Comparison Tables (CT Pages)**

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

### **4.4 Appendices**

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

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

**Appendix 3**

Provides a glossary of terms which is self-explanatory.

**Appendix 4**

Considers the relationship of direct and indirect effects of tourism.

**Appendix 5**

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

**Appendix 6**

Reviews Day Visitors and their impacts.

**Appendix 7**

Report on statistical confidence levels in STEAM.

### **4.5 Charts**

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

## **5. Contact:**

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<b>Analysis by Sector of Expenditure</b> <b>(£'s millions)</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
Accommodation	238.5	249.8	-5
Food & Drink	301.6	302.2	-0
Recreation	97.9	99.3	-1
Shopping	411.5	410.3	0
Transport	133.8	134.5	-1
Indirect Expenditure	459.9	464.4	-1
VAT	207.1	209.3	-1
<b>TOTAL</b>	<b>1,850.2</b>	<b>1,869.9</b>	<b>-1</b>

<b>Revenue by Category of Visitor</b> <b>(£'s millions)</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
Serviced Accommodation	381.3	390.5	-2
Non-Serviced Accommodation	856.0	880.6	-3
SFR	73.6	73.6	0
Day Visitors	539.3	525.2	3
<b>TOTAL</b>	<b>1,850.2</b>	<b>1,869.9</b>	<b>-1</b>

<b>Tourist Days</b> <b>(Millions)</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
Serviced Accommodation	4.9	4.9	-0
Non-Serviced Accommodation	27.6	28.1	-2
SFR	2.5	2.5	0
Day Visitors	17.0	16.6	3
<b>TOTAL</b>	<b>51.9</b>	<b>52.0</b>	<b>-0</b>

<b>Tourist Numbers</b> <b>(Millions)</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
Serviced Accommodation	2.8	2.8	0
Non-Serviced Accommodation	4.2	4.3	-1
SFR	1.0	1.0	0
Day Visitors	17.0	16.6	3
<b>TOTAL</b>	<b>25.0</b>	<b>24.6</b>	<b>2</b>

<b>Sectors in which Employment is supported</b> <b>(FTE's)</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
<b>Direct Employment</b>			
Accommodation	9385	9440	-1
Food & Drink	7322	7338	-0
Recreation	2884	2927	-1
Shopping	9109	9082	0
Transport	1451	1459	-1
Total Direct Employment	30152	30246	-0
Indirect Employment	7368	7440	-1
<b>TOTAL</b>	<b>37,520</b>	<b>37,686</b>	<b>-0</b>

## 2 EXPENDITURE

This is the final report for 2007, with comparisons with 2006

### 2.1 DIRECT Vs INDIRECT (£000's)

Month of	January	<u>2007</u>	<u>2006</u>	<u>% change</u>
Direct Expenditure		39,794	37,949	5
Indirect Expenditure		12,726	12,180	4
<b>TOTAL</b>		<b>52,521</b>	<b>50,130</b>	<b>5</b>
Month of	February	<u>2007</u>	<u>2006</u>	<u>% change</u>
Direct Expenditure		44,949	43,960	2
Indirect Expenditure		14,563	14,289	2
<b>TOTAL</b>		<b>59,512</b>	<b>58,249</b>	<b>2</b>
Month of	March	<u>2007</u>	<u>2006</u>	<u>% change</u>
Direct Expenditure		63,172	59,298	7
Indirect Expenditure		20,456	19,233	6
<b>TOTAL</b>		<b>83,629</b>	<b>78,531</b>	<b>6</b>
Month of	April	<u>2007</u>	<u>2006</u>	<u>% change</u>
Direct Expenditure		139,980	138,738	1
Indirect Expenditure		46,680	46,253	1
<b>TOTAL</b>		<b>186,660</b>	<b>184,991</b>	<b>1</b>
Month of	May	<u>2007</u>	<u>2006</u>	<u>% change</u>
Direct Expenditure		147,793	142,218	4
Indirect Expenditure		49,068	47,094	4
<b>TOTAL</b>		<b>196,862</b>	<b>189,312</b>	<b>4</b>
Month of	June	<u>2007</u>	<u>2006</u>	<u>% change</u>
Direct Expenditure		141,280	149,923	-6
Indirect Expenditure		47,038	49,995	-6
<b>TOTAL</b>		<b>188,318</b>	<b>199,918</b>	<b>-6</b>
Month of	July	<u>2007</u>	<u>2006</u>	<u>% change</u>
Direct Expenditure		200,347	217,279	-8
Indirect Expenditure		66,904	72,168	-7
<b>TOTAL</b>		<b>267,251</b>	<b>289,447</b>	<b>-8</b>

2.1 DIRECT Vs INDIRECT (£000's)

Month of		<u>2007</u>	<u>2006</u>	<u>% change</u>
	<b>August</b>			
Direct Expenditure		249,554	247,278	1
Indirect Expenditure		83,342	82,604	1
<b>TOTAL</b>		<b>332,897</b>	<b>329,882</b>	<b>1</b>
	<b>September</b>			
Direct Expenditure		147,945	157,454	-6
Indirect Expenditure		48,903	51,948	-6
<b>TOTAL</b>		<b>196,848</b>	<b>209,403</b>	<b>-6</b>
	<b>October</b>			
Direct Expenditure		116,764	112,646	4
Indirect Expenditure		38,717	37,292	4
<b>TOTAL</b>		<b>155,482</b>	<b>149,938</b>	<b>4</b>
	<b>November</b>			
Direct Expenditure		52,066	52,859	-1
Indirect Expenditure		16,592	16,771	-1
<b>TOTAL</b>		<b>68,658</b>	<b>69,630</b>	<b>-1</b>
	<b>December</b>			
Direct Expenditure		46,707	45,911	2
Indirect Expenditure		14,905	14,548	2
<b>TOTAL</b>		<b>61,612</b>	<b>60,459</b>	<b>2</b>
	<b>Cumulative to December</b>			
Direct Expenditure		1,390,353	1,405,515	-1
Indirect Expenditure		459,895	464,377	-1
<b>TOTAL</b>		<b>1,850,247</b>	<b>1,869,891</b>	<b>-1</b>

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

<b>Month of</b>	<b>January</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Accommodation		6,981	6,271	11
Food & Drink		9,189	8,851	4
Recreation		2,554	2,453	4
Shopping		11,615	11,331	3
Transport		3,529	3,391	4
Indirect Expenditure		12,726	12,180	4
VAT		5,927	5,652	5
<b>TOTAL</b>		<b>52,521</b>	<b>50,130</b>	<b>5</b>

<b>Month of</b>	<b>February</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Accommodation		8,876	8,734	2
Food & Drink		9,160	8,917	3
Recreation		2,884	2,835	2
Shopping		13,352	13,059	2
Transport		3,982	3,868	3
Indirect Expenditure		14,563	14,289	2
VAT		6,695	6,547	2
<b>TOTAL</b>		<b>59,512</b>	<b>58,249</b>	<b>2</b>

<b>Month of</b>	<b>March</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Accommodation		11,995	11,415	5
Food & Drink		13,941	13,161	6
Recreation		4,026	3,802	6
Shopping		18,000	16,641	8
Transport		5,802	5,447	7
Indirect Expenditure		20,456	19,233	6
VAT		9,409	8,832	7
<b>TOTAL</b>		<b>83,629</b>	<b>78,531</b>	<b>6</b>

<b>Month of</b>	<b>April</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Accommodation		17,601	18,300	-4
Food & Drink		31,716	31,308	1
Recreation		10,524	10,365	2
Shopping		44,975	44,062	2
Transport		14,315	14,040	2
Indirect Expenditure		46,680	46,253	1
VAT		20,848	20,663	1
<b>TOTAL</b>		<b>186,660</b>	<b>184,991</b>	<b>1</b>

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

Month of	May	<u>2007</u>	<u>2006</u>	<u>% change</u>
Accommodation		19,853	20,446	-3
Food & Drink		33,485	32,235	4
Recreation		10,965	10,740	2
Shopping		46,331	43,113	7
Transport		15,147	14,503	4
Indirect Expenditure		49,068	47,094	4
VAT		22,012	21,181	4
<b>TOTAL</b>		<b>196,862</b>	<b>189,312</b>	<b>4</b>

Month of	June	<u>2007</u>	<u>2006</u>	<u>% change</u>
Accommodation		19,828	21,668	-8
Food & Drink		31,832	33,516	-5
Recreation		10,467	11,260	-7
Shopping		43,707	45,921	-5
Transport		14,405	15,229	-5
Indirect Expenditure		47,038	49,995	-6
VAT		21,042	22,329	-6
<b>TOTAL</b>		<b>188,318</b>	<b>199,918</b>	<b>-6</b>

Month of	July	<u>2007</u>	<u>2006</u>	<u>% change</u>
Accommodation		36,614	40,784	-10
Food & Drink		42,890	45,598	-6
Recreation		13,960	15,331	-9
Shopping		57,959	62,486	-7
Transport		19,085	20,721	-8
Indirect Expenditure		66,904	72,168	-7
VAT		29,839	32,361	-8
<b>TOTAL</b>		<b>267,251</b>	<b>289,447</b>	<b>-8</b>

Month of	August	<u>2007</u>	<u>2006</u>	<u>% change</u>
Accommodation		45,169	45,876	-2
Food & Drink		52,380	51,621	1
Recreation		18,181	17,952	1
Shopping		72,588	71,212	2
Transport		24,070	23,789	1
Indirect Expenditure		83,342	82,604	1
VAT		37,168	36,829	1
<b>TOTAL</b>		<b>332,897</b>	<b>329,882</b>	<b>1</b>

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

<b>Month of</b>	<b>September</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Accommodation		32,869	35,698	-8
Food & Drink		29,726	31,347	-5
Recreation		9,455	10,385	-9
Shopping		40,576	42,450	-4
Transport		13,285	14,125	-6
Indirect Expenditure		48,903	51,948	-6
VAT		22,034	23,451	-6
<b>TOTAL</b>		<b>196,848</b>	<b>209,403</b>	<b>-6</b>

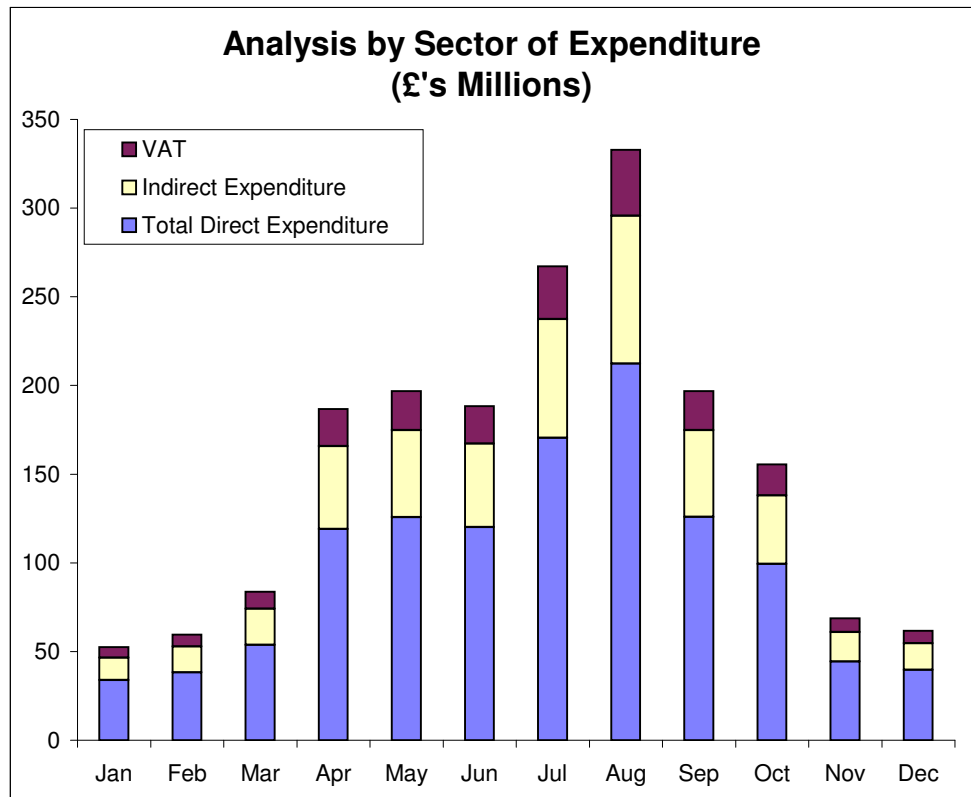
<b>Month of</b>	<b>October</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Accommodation		17,600	18,136	-3
Food & Drink		26,295	25,148	5
Recreation		8,342	7,800	7
Shopping		35,541	33,794	5
Transport		11,596	10,990	6
Indirect Expenditure		38,717	37,292	4
VAT		17,390	16,777	4
<b>TOTAL</b>		<b>155,482</b>	<b>149,938</b>	<b>4</b>

<b>Month of</b>	<b>November</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Accommodation		11,605	12,297	-6
Food & Drink		10,740	10,740	-0
Recreation		3,459	3,553	-3
Shopping		13,964	13,807	1
Transport		4,544	4,589	-1
Indirect Expenditure		16,592	16,771	-1
VAT		7,755	7,873	-1
<b>TOTAL</b>		<b>68,658</b>	<b>69,630</b>	<b>-1</b>

<b>Month of</b>	<b>December</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Accommodation		9,521	10,173	-6
Food & Drink		10,201	9,772	4
Recreation		3,062	2,864	7
Shopping		12,920	12,414	4
Transport		4,047	3,851	5
Indirect Expenditure		14,905	14,548	2
VAT		6,956	6,838	2
<b>TOTAL</b>		<b>61,612</b>	<b>60,459</b>	<b>2</b>

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

Cumulative to December	2007	2006	% change
Accommodation	238,513	249,798	-5
Food & Drink	301,555	302,213	-0
Recreation	97,879	99,339	-1
Shopping	411,526	410,289	0
Transport	133,805	134,543	-1
Indirect Expenditure	459,895	464,377	-1
VAT	207,074	209,332	-1
<b>TOTAL</b>	<b>1,850,247</b>	<b>1,869,891</b>	<b>-1</b>



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

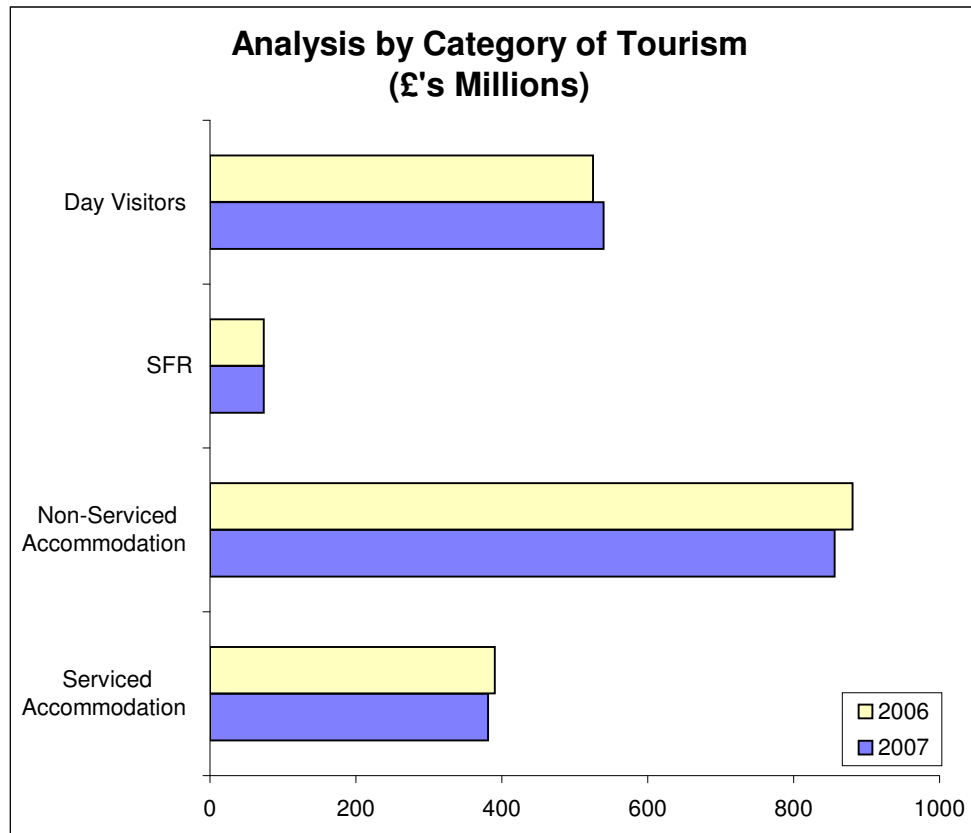
Month of	January	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		14,910	13,188	13
Non-Serviced Accommodation		12,844	11,765	9
SFR		10,242	10,232	0
Day Visitors		14,524	14,945	-3
<b>TOTAL</b>		<b>52,521</b>	<b>50,130</b>	<b>5</b>
Month of	February	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		18,834	18,026	4
Non-Serviced Accommodation		15,319	15,147	1
SFR		3,441	3,438	0
Day Visitors		21,918	21,639	1
<b>TOTAL</b>		<b>59,512</b>	<b>58,249</b>	<b>2</b>
Month of	March	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		23,215	21,234	9
Non-Serviced Accommodation		34,277	34,272	0
SFR		3,915	3,911	0
Day Visitors		22,222	19,115	16
<b>TOTAL</b>		<b>83,629</b>	<b>78,531</b>	<b>6</b>
Month of	April	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		29,107	29,803	-2
Non-Serviced Accommodation		83,668	83,181	1
SFR		9,341	9,331	0
Day Visitors		64,545	62,676	3
<b>TOTAL</b>		<b>186,660</b>	<b>184,991</b>	<b>1</b>
Month of	May	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		34,227	34,023	1
Non-Serviced Accommodation		95,567	97,808	-2
SFR		6,009	6,003	0
Day Visitors		61,059	51,478	19
<b>TOTAL</b>		<b>196,862</b>	<b>189,312</b>	<b>4</b>
Month of	June	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		33,630	34,773	-3
Non-Serviced Accommodation		94,605	102,700	-8
SFR		4,629	4,624	0
Day Visitors		55,454	57,821	-4
<b>TOTAL</b>		<b>188,318</b>	<b>199,918</b>	<b>-6</b>

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

<b>Month of</b>	<b>July</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		47,612	54,395	-12
Non-Serviced Accommodation		138,048	147,092	-6
SFR		7,511	7,503	0
Day Visitors		74,079	80,456	-8
<b>TOTAL</b>		<b>267,251</b>	<b>289,447</b>	<b>-8</b>
<b>Month of</b>	<b>August</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		58,368	57,634	1
Non-Serviced Accommodation		170,372	172,629	-1
SFR		7,951	7,943	0
Day Visitors		96,205	91,676	5
<b>TOTAL</b>		<b>332,897</b>	<b>329,882</b>	<b>1</b>
<b>Month of</b>	<b>September</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		47,556	50,035	-5
Non-Serviced Accommodation		94,885	103,421	-8
SFR		4,095	4,091	0
Day Visitors		50,312	51,855	-3
<b>TOTAL</b>		<b>196,848</b>	<b>209,403</b>	<b>-6</b>
<b>Month of</b>	<b>October</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		30,374	31,336	-3
Non-Serviced Accommodation		75,400	72,204	4
SFR		4,091	4,087	0
Day Visitors		45,616	42,311	8
<b>TOTAL</b>		<b>155,482</b>	<b>149,938</b>	<b>4</b>
<b>Month of</b>	<b>November</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		23,737	24,830	-4
Non-Serviced Accommodation		23,656	24,979	-5
SFR		3,188	3,185	0
Day Visitors		18,076	16,637	9
<b>TOTAL</b>		<b>68,658</b>	<b>69,630</b>	<b>-1</b>
<b>Month of</b>	<b>December</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		19,722	21,211	-7
Non-Serviced Accommodation		17,381	15,453	12
SFR		9,232	9,222	0
Day Visitors		15,278	14,574	5
<b>TOTAL</b>		<b>61,612</b>	<b>60,459</b>	<b>2</b>

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

<b>Cumulative to December</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
Serviced Accommodation	381,292	390,488	-2
Non-Serviced Accommodation	856,022	880,649	-3
SFR	73,644	73,571	0
Day Visitors	539,289	525,183	3
<b>TOTAL</b>	<b>1,850,247</b>	<b>1,869,891</b>	<b>-1</b>



**3 TOURIST DAYS AND NUMBERS**

**3.1 TOURIST DAYS (000's)**

Month of	January	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		208.7	177.8	17
Non-Serviced Accommodation		446.0	408.7	9
SFR		345.5	345.2	0
Day Visitors		499.7	512.6	-3
<b>TOTAL</b>		<b>1,499.9</b>	<b>1,444.3</b>	<b>4</b>

Month of	February	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		264.8	244.8	8
Non-Serviced Accommodation		488.8	476.3	3
SFR		116.1	116.0	0
Day Visitors		705.1	701.4	1
<b>TOTAL</b>		<b>1,574.8</b>	<b>1,538.5</b>	<b>2</b>

Month of	March	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		325.8	289.2	13
Non-Serviced Accommodation		1,197.8	1,187.3	1
SFR		132.1	132.0	0
Day Visitors		720.3	623.0	16
<b>TOTAL</b>		<b>2,375.9</b>	<b>2,231.5</b>	<b>6</b>

Month of	April	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		415.0	415.7	-0
Non-Serviced Accommodation		2,748.2	2,724.1	1
SFR		315.1	314.8	0
Day Visitors		2,023.2	1,975.3	2
<b>TOTAL</b>		<b>5,501.5</b>	<b>5,430.0</b>	<b>1</b>

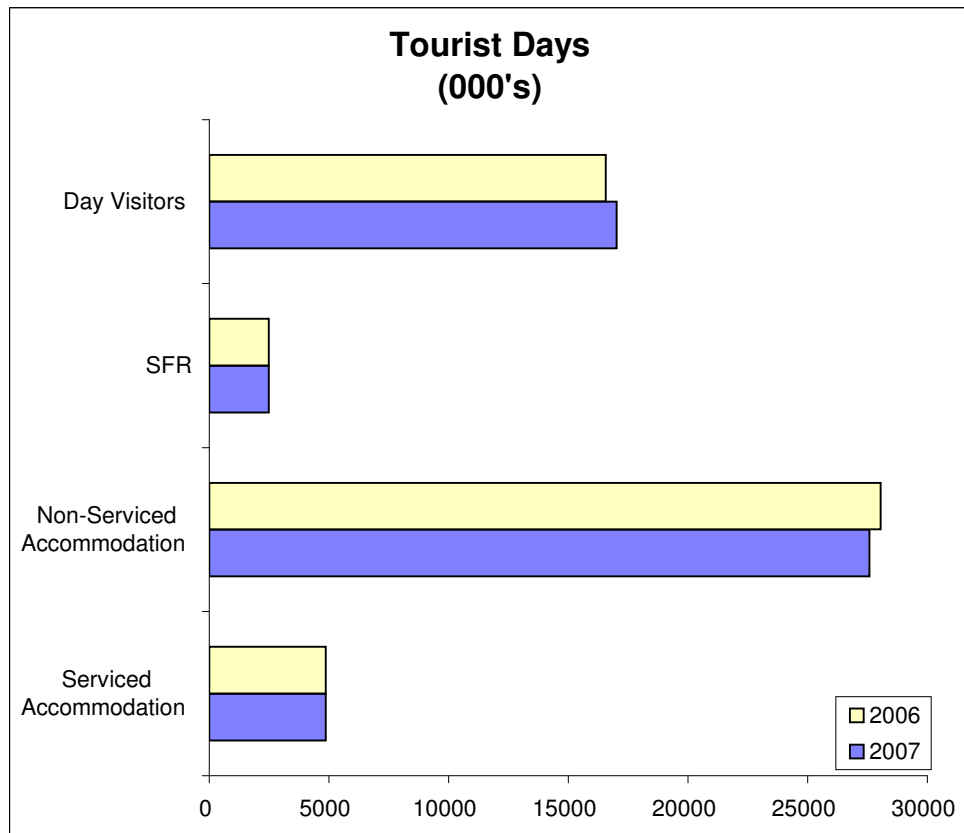
Month of	May	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		490.0	472.2	4
Non-Serviced Accommodation		3,198.3	3,248.4	-2
SFR		202.7	202.5	0
Day Visitors		1,885.7	1,605.7	17
<b>TOTAL</b>		<b>5,776.6</b>	<b>5,528.8</b>	<b>4</b>

Month of	June	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		479.2	486.3	-1
Non-Serviced Accommodation		3,136.9	3,356.0	-7
SFR		156.2	156.0	0
Day Visitors		1,717.2	1,788.6	-4
<b>TOTAL</b>		<b>5,489.5</b>	<b>5,786.9</b>	<b>-5</b>

<b>3.1 TOURIST DAYS (000's)</b>				
<b>Month of</b>	<b>July</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		509.0	576.0	-12
Non-Serviced Accommodation		4,346.2	4,553.9	-5
SFR		253.4	253.2	0
Day Visitors		2,336.2	2,503.0	-7
<b>TOTAL</b>		<b>7,444.8</b>	<b>7,886.1</b>	<b>-6</b>
<b>Month of</b>	<b>August</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		627.7	611.8	3
Non-Serviced Accommodation		5,197.4	5,214.5	-0
SFR		268.2	268.0	0
Day Visitors		3,015.0	2,852.8	6
<b>TOTAL</b>		<b>9,108.3</b>	<b>8,947.0</b>	<b>2</b>
<b>Month of</b>	<b>September</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		507.2	530.4	-4
Non-Serviced Accommodation		2,914.7	3,113.8	-6
SFR		138.2	138.0	0
Day Visitors		1,552.6	1,609.6	-4
<b>TOTAL</b>		<b>5,112.7</b>	<b>5,391.9</b>	<b>-5</b>
<b>Month of</b>	<b>October</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		432.3	438.4	-1
Non-Serviced Accommodation		2,546.4	2,441.4	4
SFR		138.0	137.9	0
Day Visitors		1,434.7	1,330.1	8
<b>TOTAL</b>		<b>4,551.4</b>	<b>4,347.7</b>	<b>5</b>
<b>Month of</b>	<b>November</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		332.8	338.6	-2
Non-Serviced Accommodation		791.5	825.1	-4
SFR		107.6	107.5	0
Day Visitors		602.6	556.6	8
<b>TOTAL</b>		<b>1,834.5</b>	<b>1,827.7</b>	<b>0</b>
<b>Month of</b>	<b>December</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		273.3	289.2	-5
Non-Serviced Accommodation		565.8	500.5	13
SFR		311.4	311.2	0
Day Visitors		528.7	502.8	5
<b>TOTAL</b>		<b>1,679.3</b>	<b>1,603.6</b>	<b>5</b>

**3.1 TOURIST DAYS (000's)**

<b>Cumulative to December</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
Serviced Accommodation	4,865.7	4,870.4	-0
Non-Serviced Accommodation	27,578.0	28,050.1	-2
SFR	2,484.5	2,482.3	0
Day Visitors	17,021.1	16,561.3	3
<b>TOTAL</b>	<b>51,949.3</b>	<b>51,964.1</b>	<b>-0</b>



3.2 TOURIST NUMBERS (000's)

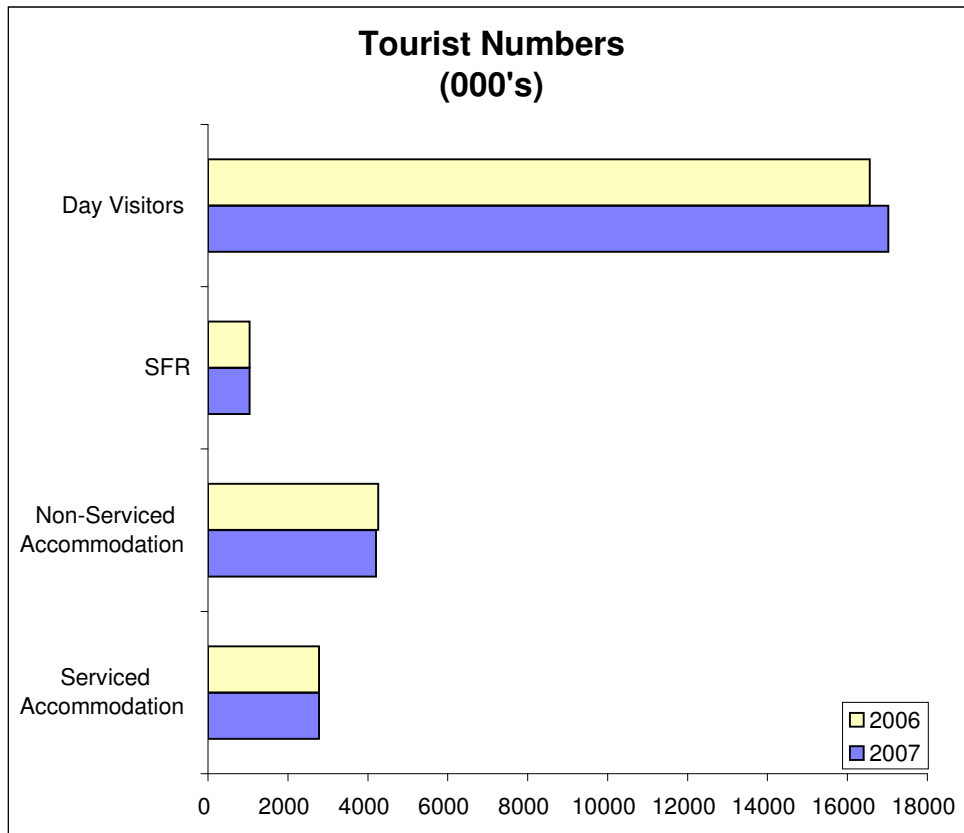
Month of	January	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		136.0	114.7	19
Non-Serviced Accommodation		131.2	120.2	9
SFR		138.2	138.1	0
Day Visitors		499.7	512.6	-3
<b>TOTAL</b>		<b>905.1</b>	<b>885.6</b>	<b>2</b>
Month of	February	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		179.1	165.7	8
Non-Serviced Accommodation		122.2	119.1	3
SFR		55.3	55.2	0
Day Visitors		705.1	701.4	1
<b>TOTAL</b>		<b>1,061.7</b>	<b>1,041.4</b>	<b>2</b>
Month of	March	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		158.0	140.3	13
Non-Serviced Accommodation		249.5	247.4	1
SFR		61.4	61.4	0
Day Visitors		720.3	623.0	16
<b>TOTAL</b>		<b>1,189.3</b>	<b>1,072.0</b>	<b>11</b>
Month of	April	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		228.9	229.3	-0
Non-Serviced Accommodation		429.4	425.6	1
SFR		116.7	116.6	0
Day Visitors		2,023.2	1,975.3	2
<b>TOTAL</b>		<b>2,798.2</b>	<b>2,746.9</b>	<b>2</b>
Month of	May	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		261.8	252.4	4
Non-Serviced Accommodation		463.5	470.8	-2
SFR		92.1	92.1	0
Day Visitors		1,885.7	1,605.7	17
<b>TOTAL</b>		<b>2,703.1</b>	<b>2,420.9</b>	<b>12</b>
Month of	June	<u>2007</u>	<u>2006</u>	<u>% change</u>
Serviced Accommodation		269.8	274.1	-2
Non-Serviced Accommodation		448.1	479.4	-7
SFR		74.4	74.3	0
Day Visitors		1,717.2	1,788.6	-4
<b>TOTAL</b>		<b>2,509.5</b>	<b>2,616.5</b>	<b>-4</b>

**3.2 TOURIST NUMBERS (000's)**

<b>Month of</b>	<b>July</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		299.2	336.4	-11
Non-Serviced Accommodation		612.1	641.4	-5
SFR		101.4	101.3	0
Day Visitors		2,336.2	2,503.0	-7
<b>TOTAL</b>		<b>3,349.0</b>	<b>3,582.1</b>	<b>-7</b>
<b>Month of</b>	<b>August</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		368.6	357.5	3
Non-Serviced Accommodation		683.9	686.1	-0
SFR		103.2	103.1	0
Day Visitors		3,015.0	2,852.8	6
<b>TOTAL</b>		<b>4,170.7</b>	<b>3,999.5</b>	<b>4</b>
<b>Month of</b>	<b>September</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		261.5	274.3	-5
Non-Serviced Accommodation		422.4	451.3	-6
SFR		63.7	63.6	0
Day Visitors		1,552.6	1,609.6	-4
<b>TOTAL</b>		<b>2,300.2</b>	<b>2,398.9</b>	<b>-4</b>
<b>Month of</b>	<b>October</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		249.8	253.5	-1
Non-Serviced Accommodation		363.8	348.8	4
SFR		64.5	64.4	0
Day Visitors		1,434.7	1,330.1	8
<b>TOTAL</b>		<b>2,112.7</b>	<b>1,996.8</b>	<b>6</b>
<b>Month of</b>	<b>November</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		195.5	198.9	-2
Non-Serviced Accommodation		175.9	183.4	-4
SFR		53.0	52.9	0
Day Visitors		602.6	556.6	8
<b>TOTAL</b>		<b>1,027.0</b>	<b>991.7</b>	<b>4</b>
<b>Month of</b>	<b>December</b>	<b><u>2007</u></b>	<b><u>2006</u></b>	<b><u>% change</u></b>
Serviced Accommodation		168.6	179.3	-6
Non-Serviced Accommodation		101.0	89.4	13
SFR		119.8	119.7	0
Day Visitors		528.7	502.8	5
<b>TOTAL</b>		<b>918.1</b>	<b>891.2</b>	<b>3</b>

**3.2 TOURIST NUMBERS (000's)**

<b>Cumulative to December</b>	<b>2007</b>	<b>2006</b>	<b>% change</b>
Serviced Accommodation	2,776.8	2,776.5	0
Non-Serviced Accommodation	4,203.1	4,262.8	-1
SFR	1,043.6	1,042.7	0
Day Visitors	17,021.1	16,561.3	3
<b>TOTAL</b>	<b>25,044.6</b>	<b>24,643.3</b>	<b>2</b>



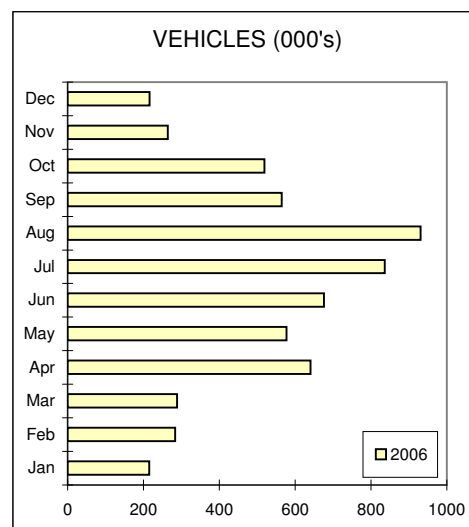
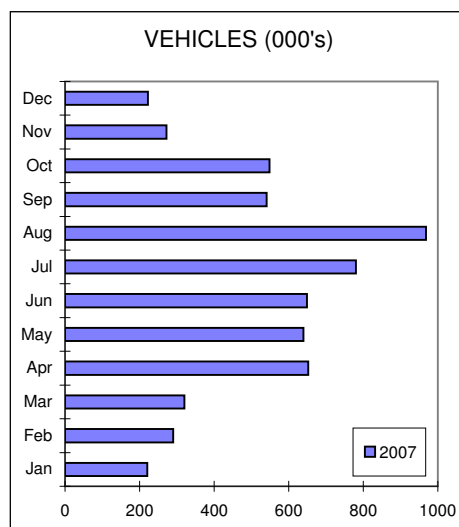
**4 TOURIST TRAFFIC** **2007** **2006** **% change**

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

Jan	220.2	214.9	2
Feb	290.0	283.8	2
Mar	320.2	289.0	11
Apr	652.6	640.6	2
May	639.1	577.0	11
Jun	648.7	676.2	-4
Jul	780.1	836.2	-7
Aug	968.5	930.7	4
Sep	540.5	564.6	-4
Oct	548.5	519.4	6
Nov	271.9	264.3	3
Dec	222.1	215.9	3
<b>TOTAL</b>	<b>6,102.4</b>	<b>6,012.6</b>	<b>1</b>

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

VEHICLE DAYS (000's)	2007	2006	% change
Jan	381.2	366.8	4
Feb	440.1	429.7	2
Mar	643.4	603.8	7
Apr	1,365.6	1,345.6	1
May	1,461.1	1,409.3	4
Jun	1,445.5	1,523.9	-5
Jul	1,838.1	1,962.2	-6
Aug	2,256.7	2,223.6	1
Sep	1,282.6	1,357.8	-6
Oct	1,184.3	1,129.6	5
Nov	489.2	492.5	-1
Dec	421.8	401.8	5
<b>TOTAL</b>	<b>13,209.7</b>	<b>13,246.6</b>	<b>-0</b>



<b>Economic Impact</b>	<b>Expenditure and Revenue £'000's</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	39,794	44,949	63,172	139,980	147,793	141,280	200,347	249,554	147,945	116,764	52,066	46,707	<b>1,390,353</b>
Indirect Expenditure	12,726	14,563	20,456	46,680	49,068	47,038	66,904	83,342	48,903	38,717	16,592	14,905	<b>459,895</b>
<b>Total</b>	<b>52,521</b>	<b>59,512</b>	<b>83,629</b>	<b>186,660</b>	<b>196,862</b>	<b>188,318</b>	<b>267,251</b>	<b>332,897</b>	<b>196,848</b>	<b>155,482</b>	<b>68,658</b>	<b>61,612</b>	<b>1,850,247</b>

<b>Economic Impact</b>	<b>Expenditure and Revenue £'000's</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	33,868	38,255	53,764	119,132	125,782	120,238	170,508	212,387	125,911	99,374	44,312	39,750	<b>1,183,279</b>
Indirect Expenditure	12,726	14,563	20,456	46,680	49,068	47,038	66,904	83,342	48,903	38,717	16,592	14,905	<b>459,895</b>
VAT	5,927	6,695	9,409	20,848	22,012	21,042	29,839	37,168	22,034	17,390	7,755	6,956	<b>207,074</b>
<b>Total</b>	<b>52,521</b>	<b>59,512</b>	<b>83,629</b>	<b>186,660</b>	<b>196,862</b>	<b>188,318</b>	<b>267,251</b>	<b>332,897</b>	<b>196,848</b>	<b>155,482</b>	<b>68,658</b>	<b>61,612</b>	<b>1,850,247</b>

<b>Economic Impact</b>	<b>Categories giving rise to tourism expenditure</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	14,910	18,834	23,215	29,107	34,227	33,630	47,612	58,368	47,556	30,374	23,737	19,722	<b>381,292</b>
Non-Serviced Accommodation	12,844	15,319	34,277	83,668	95,567	94,605	138,048	170,372	94,885	75,400	23,656	17,381	<b>856,022</b>
SFR	10,242	3,441	3,915	9,341	6,009	4,629	7,511	7,951	4,095	4,091	3,188	9,232	<b>73,644</b>
Day Visitors	14,524	21,918	22,222	64,545	61,059	55,454	74,079	96,205	50,312	45,616	18,076	15,278	<b>539,289</b>
<b>Total</b>	<b>52,521</b>	<b>59,512</b>	<b>83,629</b>	<b>186,660</b>	<b>196,862</b>	<b>188,318</b>	<b>267,251</b>	<b>332,897</b>	<b>196,848</b>	<b>155,482</b>	<b>68,658</b>	<b>61,612</b>	<b>1,850,247</b>

<b>Economic Impact</b>	<b>Sectors in which expenditure is made</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<b>Direct Expenditure</b>													
Accommodation	6,981	8,876	11,995	17,601	19,853	19,828	36,614	45,169	32,869	17,600	11,605	9,521	<b>238,513</b>
Food & Drink	9,189	9,160	13,941	31,716	33,485	31,832	42,890	52,380	29,726	26,295	10,740	10,201	<b>301,555</b>
Recreation	2,554	2,884	4,026	10,524	10,965	10,467	13,960	18,181	9,455	8,342	3,459	3,062	<b>97,879</b>
Shopping	11,615	13,352	18,000	44,975	46,331	43,707	57,959	72,588	40,576	35,541	13,964	12,920	<b>411,526</b>
Transport	3,529	3,982	5,802	14,315	15,147	14,405	19,085	24,070	13,285	11,596	4,544	4,047	<b>133,805</b>
<b>Total Direct Expenditure</b>	<b>33,868</b>	<b>38,255</b>	<b>53,764</b>	<b>119,132</b>	<b>125,782</b>	<b>120,238</b>	<b>170,508</b>	<b>212,387</b>	<b>125,911</b>	<b>99,374</b>	<b>44,312</b>	<b>39,750</b>	<b>1,183,279</b>
VAT	5,927	6,695	9,409	20,848	22,012	21,042	29,839	37,168	22,034	17,390	7,755	6,956	<b>207,074</b>
Indirect Expenditure	12,726	14,563	20,456	46,680	49,068	47,038	66,904	83,342	48,903	38,717	16,592	14,905	<b>459,895</b>
<b>Total</b>	<b>18,653</b>	<b>21,257</b>	<b>29,865</b>	<b>67,528</b>	<b>71,080</b>	<b>68,079</b>	<b>96,743</b>	<b>120,510</b>	<b>70,937</b>	<b>56,108</b>	<b>24,346</b>	<b>21,861</b>	<b>1,850,247</b>

<b>Population</b>													<b>Avg</b>	
Total Population	675,701	675,701	675,701	675,701	675,701	675,701	675,701	675,701	675,701	675,701	675,701	675,701	675,701	<b>675,701</b>

<b>Employment</b>													<b>FTE's</b>
<b>Supported by tourism activity in these Categories</b>													
<b>Direct Employment</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	6,116	6,750	7,459	8,904	9,353	9,298	9,496	10,270	9,464	8,936	7,301	6,817	<b>8,347</b>
Non-Serviced Accommodation	3,649	3,954	7,394	16,154	18,101	17,896	22,992	28,258	16,742	14,842	5,258	4,295	<b>13,295</b>
SFR	1,760	591	673	1,605	1,032	795	1,290	1,366	704	703	548	1,586	<b>1,054</b>
Day Visitors	2,436	3,645	3,699	10,699	10,104	9,179	12,289	15,947	8,325	7,565	3,019	2,564	<b>7,456</b>
<b>Total Direct Employment</b>	<b>13,961</b>	<b>14,940</b>	<b>19,225</b>	<b>37,362</b>	<b>38,590</b>	<b>37,168</b>	<b>46,067</b>	<b>55,842</b>	<b>35,234</b>	<b>32,046</b>	<b>16,126</b>	<b>15,262</b>	<b>30,152</b>
Indirect Employment	2,447	2,800	3,933	8,974	9,433	9,043	12,862	16,023	9,402	7,444	3,190	2,866	<b>7,368</b>
<b>Total</b>	<b>16,407</b>	<b>17,740</b>	<b>23,158</b>	<b>46,337</b>	<b>48,023</b>	<b>46,211</b>	<b>58,930</b>	<b>71,864</b>	<b>44,636</b>	<b>39,489</b>	<b>19,316</b>	<b>18,127</b>	<b>37,520</b>

<b>Employment</b>													<b>FTE's</b>
<b>Sectors in which employment is supported</b>													
<b>Direct Employment</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	6,836	7,186	8,203	10,590	10,678	10,708	10,755	11,737	10,722	10,485	7,473	7,248	<b>9,385</b>
Food & Drink	2,677	2,669	4,062	9,241	9,756	9,275	12,497	15,262	8,661	7,662	3,129	2,972	<b>7,322</b>
Recreation	903	1,020	1,423	3,721	3,877	3,701	4,936	6,428	3,343	2,949	1,223	1,083	<b>2,884</b>
Shopping	3,085	3,547	4,781	11,946	12,307	11,610	15,395	19,281	10,778	9,440	3,709	3,432	<b>9,109</b>
Transport	459	518	755	1,863	1,972	1,875	2,484	3,133	1,729	1,509	591	527	<b>1,451</b>
<b>Total Direct Employment</b>	<b>13,961</b>	<b>14,940</b>	<b>19,225</b>	<b>37,362</b>	<b>38,590</b>	<b>37,168</b>	<b>46,067</b>	<b>55,842</b>	<b>35,234</b>	<b>32,046</b>	<b>16,126</b>	<b>15,262</b>	<b>30,152</b>
Indirect Employment	2,447	2,800	3,933	8,974	9,433	9,043	12,862	16,023	9,402	7,444	3,190	2,866	<b>7,368</b>
<b>Total</b>	<b>16,407</b>	<b>17,740</b>	<b>23,158</b>	<b>46,337</b>	<b>48,023</b>	<b>46,211</b>	<b>58,930</b>	<b>71,864</b>	<b>44,636</b>	<b>39,489</b>	<b>19,316</b>	<b>18,127</b>	<b>37,520</b>

<b>Tourists</b>	<b>Tourists 000's</b>												
<b>Tourist Days 000's</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	<b>TOTAL</b>
Serviced Accommodation	208.7	264.8	325.8	415.0	490.0	479.2	509.0	627.7	507.2	432.3	332.8	273.3	<b>4,866</b>
Non-Serviced Accommodation	446.0	488.8	1,197.8	2,748.2	3,198.3	3,136.9	4,346.2	5,197.4	2,914.7	2,546.4	791.5	565.8	<b>27,578</b>
SFR	345.5	116.1	132.1	315.1	202.7	156.2	253.4	268.2	138.2	138.0	107.6	311.4	<b>2,484</b>
Day Visitors	499.7	705.1	720.3	2,023.2	1,885.7	1,717.2	2,336.2	3,015.0	1,552.6	1,434.7	602.6	528.7	<b>17,021</b>
<b>Total Tourist Days 000's</b>	<b>1,499.9</b>	<b>1,574.8</b>	<b>2,375.9</b>	<b>5,501.5</b>	<b>5,776.6</b>	<b>5,489.5</b>	<b>7,444.8</b>	<b>9,108.3</b>	<b>5,112.7</b>	<b>4,551.4</b>	<b>1,834.5</b>	<b>1,679.3</b>	<b>51,949</b>

<b>Tourists</b>	<b>Tourists 000's</b>												
<b>Tourist Numbers 000's</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	<b>TOTAL</b>
Serviced Accommodation	136.0	179.1	158.0	228.9	261.8	269.8	299.2	368.6	261.5	249.8	195.5	168.6	<b>2,777</b>
Non-Serviced Accommodation	131.2	122.2	249.5	429.4	463.5	448.1	612.1	683.9	422.4	363.8	175.9	101.0	<b>4,203</b>
SFR	138.2	55.3	61.4	116.7	92.1	74.4	101.4	103.2	63.7	64.5	53.0	119.8	<b>1,044</b>
Day Visitors	499.7	705.1	720.3	2,023.2	1,885.7	1,717.2	2,336.2	3,015.0	1,552.6	1,434.7	602.6	528.7	<b>17,021</b>
<b>Total Tourist Numbers 000's</b>	<b>905.1</b>	<b>1,061.7</b>	<b>1,189.3</b>	<b>2,798.2</b>	<b>2,703.1</b>	<b>2,509.5</b>	<b>3,349.0</b>	<b>4,170.7</b>	<b>2,300.2</b>	<b>2,112.7</b>	<b>1,027.0</b>	<b>918.1</b>	<b>25,045</b>

<b>Vehicles</b>	<b>Vehicles 000's</b>												
<b>Vehicle Days 000's</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	<b>TOTAL</b>
Serviced Accommodation	54.0	91.2	117.1	108.4	137.3	133.7	132.9	163.6	132.4	129.3	101.7	71.8	<b>1,373</b>
Non-Serviced Accommodation	111.0	135.9	304.5	715.1	846.6	832.0	1,113.3	1,347.3	766.1	651.8	202.9	137.9	<b>7,164</b>
SFR	106.3	35.7	40.6	97.0	62.4	48.1	78.0	82.5	42.5	42.5	33.1	95.8	<b>765</b>
Day Visitors	109.9	177.3	181.1	445.1	414.8	431.7	514.0	663.3	341.6	360.7	151.5	116.3	<b>3,907</b>
<b>Total Vehicle Days 000's</b>	<b>381.2</b>	<b>440.1</b>	<b>643.4</b>	<b>1,365.6</b>	<b>1,461.1</b>	<b>1,445.5</b>	<b>1,838.1</b>	<b>2,256.7</b>	<b>1,282.6</b>	<b>1,184.3</b>	<b>489.2</b>	<b>421.8</b>	<b>13,210</b>

<b>Vehicles</b>	<b>Vehicles 000's</b>												
<b>Vehicle Numbers 000's</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	<b>TOTAL</b>
Serviced Accommodation	35.1	61.7	56.8	59.8	73.2	75.2	78.1	96.2	68.3	74.8	58.9	44.3	<b>783</b>
Non-Serviced Accommodation	32.6	34.0	63.4	111.7	122.7	118.9	156.8	177.3	111.0	93.1	45.1	24.6	<b>1,091</b>
SFR	42.5	17.0	18.9	35.9	28.4	22.9	31.2	31.7	19.6	19.8	16.3	36.9	<b>321</b>
Day Visitors	109.9	177.3	181.1	445.1	414.8	431.7	514.0	663.3	341.6	360.7	151.5	116.3	<b>3,907</b>
<b>Total Vehicle Numbers 000's</b>	<b>220.2</b>	<b>290.0</b>	<b>320.2</b>	<b>652.6</b>	<b>639.1</b>	<b>648.7</b>	<b>780.1</b>	<b>968.5</b>	<b>540.5</b>	<b>548.5</b>	<b>271.9</b>	<b>222.1</b>	<b>6,102</b>

<b>BED STOCK (number of beds)</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	<b>MAX</b>
Serviced Accommodation	23,694	25,351	27,098	30,119	30,212	30,250	30,297	30,289	30,266	29,938	26,494	25,722	<b>30,297</b>
Non-Serviced Accommodation	57,856	58,252	120,018	198,701	199,207	199,894	200,217	200,217	198,249	194,958	73,344	67,218	<b>200,217</b>
<b>Total BED STOCK (number of beds)</b>	<b>81,550</b>	<b>83,603</b>	<b>147,116</b>	<b>228,820</b>	<b>229,419</b>	<b>230,144</b>	<b>230,514</b>	<b>230,506</b>	<b>228,515</b>	<b>224,896</b>	<b>99,838</b>	<b>92,940</b>	<b>230,514</b>

<b>Economic Impact</b>	<b>Expenditure and Revenue £'000's</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	36,406	42,172	56,886	133,095	136,433	143,825	208,441	237,220	151,050	108,064	50,709	44,044	<b>1,348,345</b>
Indirect Expenditure	11,685	13,708	18,450	44,372	45,179	47,962	69,232	79,244	49,835	35,775	16,089	13,956	<b>445,488</b>
<b>Total</b>	<b>48,091</b>	<b>55,880</b>	<b>75,337</b>	<b>177,466</b>	<b>181,612</b>	<b>191,787</b>	<b>277,674</b>	<b>316,464</b>	<b>200,885</b>	<b>143,840</b>	<b>66,798</b>	<b>58,000</b>	<b>1,793,833</b>

<b>Economic Impact</b>	<b>Expenditure and Revenue £'000's</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	30,983	35,891	48,414	113,272	116,114	122,404	177,397	201,889	128,553	91,969	43,157	37,484	<b>1,147,528</b>
Indirect Expenditure	11,685	13,708	18,450	44,372	45,179	47,962	69,232	79,244	49,835	35,775	16,089	13,956	<b>445,488</b>
VAT	5,422	6,281	8,472	19,823	20,320	21,421	31,044	35,331	22,497	16,095	7,552	6,560	<b>200,817</b>
<b>Total</b>	<b>48,091</b>	<b>55,880</b>	<b>75,337</b>	<b>177,466</b>	<b>181,612</b>	<b>191,787</b>	<b>277,674</b>	<b>316,464</b>	<b>200,885</b>	<b>143,840</b>	<b>66,798</b>	<b>58,000</b>	<b>1,793,833</b>

<b>Economic Impact</b>	<b>Categories giving rise to tourism expenditure</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	12,652	17,293	20,370	28,590	32,639	33,359	52,183	55,289	48,000	30,062	23,820	20,348	<b>374,605</b>
Non-Serviced Accommodation	11,286	14,531	32,878	79,797	93,830	98,523	141,109	165,607	99,214	69,267	23,963	14,824	<b>844,828</b>
SFR	9,816	3,298	3,752	8,952	5,759	4,436	7,198	7,620	3,925	3,921	3,055	8,847	<b>70,579</b>
Day Visitors	14,337	20,758	18,338	60,127	49,384	55,469	77,184	87,947	49,746	40,590	15,960	13,981	<b>503,821</b>
<b>Total</b>	<b>48,091</b>	<b>55,880</b>	<b>75,337</b>	<b>177,466</b>	<b>181,612</b>	<b>191,787</b>	<b>277,674</b>	<b>316,464</b>	<b>200,885</b>	<b>143,840</b>	<b>66,798</b>	<b>58,000</b>	<b>1,793,833</b>

<b>Economic Impact</b>	<b>Sectors in which expenditure is made</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<b>Direct Expenditure</b>													
Accommodation	6,016	8,379	10,951	17,555	19,615	20,786	39,125	44,010	34,246	17,399	11,797	9,759	<b>239,637</b>
Food & Drink	8,491	8,554	12,626	30,034	30,924	32,153	43,743	49,521	30,072	24,125	10,303	9,374	<b>289,921</b>
Recreation	2,353	2,719	3,648	9,944	10,303	10,802	14,707	17,221	9,962	7,483	3,408	2,748	<b>95,299</b>
Shopping	10,870	12,528	15,965	42,269	41,359	44,054	59,944	68,315	40,723	32,419	13,245	11,909	<b>393,600</b>
Transport	3,253	3,711	5,225	13,469	13,913	14,609	19,878	22,822	13,550	10,543	4,403	3,694	<b>129,070</b>
<b>Total Direct Expenditure</b>	<b>30,983</b>	<b>35,891</b>	<b>48,414</b>	<b>113,272</b>	<b>116,114</b>	<b>122,404</b>	<b>177,397</b>	<b>201,889</b>	<b>128,553</b>	<b>91,969</b>	<b>43,157</b>	<b>37,484</b>	<b>1,147,528</b>
VAT	5,422	6,281	8,472	19,823	20,320	21,421	31,044	35,331	22,497	16,095	7,552	6,560	<b>200,817</b>
Indirect Expenditure	11,685	13,708	18,450	44,372	45,179	47,962	69,232	79,244	49,835	35,775	16,089	13,956	<b>445,488</b>
<b>Total</b>	<b>17,107</b>	<b>19,989</b>	<b>26,923</b>	<b>64,194</b>	<b>65,499</b>	<b>69,382</b>	<b>100,277</b>	<b>114,575</b>	<b>72,332</b>	<b>51,870</b>	<b>23,642</b>	<b>20,516</b>	<b>1,793,833</b>

<b>Population</b>													<b>Avg</b>
Total Population	675,100	675,100	675,100	675,100	675,100	675,100	675,100	675,100	675,100	675,100	675,100	675,100	<b>675,100</b>

<b>Employment</b>													<b>FTE's</b>
<b>Supported by tourism activity in these Categories</b>													
<b>Direct Employment</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	6,064	6,741	7,359	8,997	9,352	9,433	9,978	10,191	9,693	9,040	7,424	6,955	<b>8,436</b>
Non-Serviced Accommodation	3,468	3,893	7,350	15,973	18,358	18,901	24,242	28,349	17,731	14,282	5,443	3,974	<b>13,497</b>
SFR	1,758	591	672	1,603	1,031	794	1,289	1,365	703	702	547	1,584	<b>1,053</b>
Day Visitors	2,505	3,602	3,184	10,396	8,528	9,570	13,325	15,184	8,586	7,016	2,780	2,445	<b>7,260</b>
<b>Total Direct Employment</b>	<b>13,796</b>	<b>14,826</b>	<b>18,565</b>	<b>36,970</b>	<b>37,269</b>	<b>38,698</b>	<b>48,834</b>	<b>55,088</b>	<b>36,714</b>	<b>31,040</b>	<b>16,195</b>	<b>14,958</b>	<b>30,246</b>
Indirect Employment	2,342	2,747	3,698	8,892	9,054	9,612	13,875	15,881	9,987	7,170	3,224	2,797	<b>7,440</b>
<b>Total</b>	<b>16,138</b>	<b>17,574</b>	<b>22,263</b>	<b>45,863</b>	<b>46,323</b>	<b>48,310</b>	<b>62,708</b>	<b>70,969</b>	<b>46,701</b>	<b>38,210</b>	<b>19,420</b>	<b>17,755</b>	<b>37,686</b>

<b>Employment</b>													<b>FTE's</b>
<b>Sectors in which employment is supported</b>													
<b>Direct Employment</b>	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	6,899	7,254	8,256	10,652	10,739	10,771	10,832	11,688	10,794	10,547	7,545	7,299	<b>9,440</b>
Food & Drink	2,579	2,598	3,835	9,122	9,392	9,766	13,286	15,041	9,134	7,327	3,129	2,847	<b>7,338</b>
Recreation	867	1,002	1,344	3,665	3,797	3,981	5,421	6,347	3,672	2,758	1,256	1,013	<b>2,927</b>
Shopping	3,010	3,469	4,420	11,704	11,452	12,198	16,598	18,916	11,276	8,977	3,667	3,298	<b>9,082</b>
Transport	441	504	709	1,828	1,888	1,982	2,697	3,097	1,839	1,431	597	501	<b>1,459</b>
<b>Total Direct Employment</b>	<b>13,796</b>	<b>14,826</b>	<b>18,565</b>	<b>36,970</b>	<b>37,269</b>	<b>38,698</b>	<b>48,834</b>	<b>55,088</b>	<b>36,714</b>	<b>31,040</b>	<b>16,195</b>	<b>14,958</b>	<b>30,246</b>
Indirect Employment	2,342	2,747	3,698	8,892	9,054	9,612	13,875	15,881	9,987	7,170	3,224	2,797	<b>7,440</b>
<b>Total</b>	<b>16,138</b>	<b>17,574</b>	<b>22,263</b>	<b>45,863</b>	<b>46,323</b>	<b>48,310</b>	<b>62,708</b>	<b>70,969</b>	<b>46,701</b>	<b>38,210</b>	<b>19,420</b>	<b>17,755</b>	<b>37,686</b>

<b>Tourists</b>	<b>Tourists 000's</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<b>Tourist Days 000's</b>													
Serviced Accommodation	177.8	244.8	289.2	415.7	472.2	486.3	576.0	611.8	530.4	438.4	338.6	289.2	4,870
Non-Serviced Accommodation	408.7	476.3	1,187.3	2,724.1	3,248.4	3,356.0	4,553.9	5,214.5	3,113.8	2,441.4	825.1	500.5	28,050
SFR	345.2	116.0	132.0	314.8	202.5	156.0	253.2	268.0	138.0	137.9	107.5	311.2	2,482
Day Visitors	512.6	701.4	623.0	1,975.3	1,605.7	1,788.6	2,503.0	2,852.8	1,609.6	1,330.1	556.6	502.8	16,561
<b>Total Tourist Days 000's</b>	<b>1,444.3</b>	<b>1,538.5</b>	<b>2,231.5</b>	<b>5,430.0</b>	<b>5,528.8</b>	<b>5,786.9</b>	<b>7,886.1</b>	<b>8,947.0</b>	<b>5,391.9</b>	<b>4,347.7</b>	<b>1,827.7</b>	<b>1,603.6</b>	<b>51,964</b>

<b>Tourists</b>	<b>Tourists 000's</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<b>Tourist Numbers 000's</b>													
Serviced Accommodation	114.7	165.7	140.3	229.3	252.4	274.1	336.4	357.5	274.3	253.5	198.9	179.3	2,776
Non-Serviced Accommodation	120.2	119.1	247.4	425.6	470.8	479.4	641.4	686.1	451.3	348.8	183.4	89.4	4,263
SFR	138.1	55.2	61.4	116.6	92.1	74.3	101.3	103.1	63.6	64.4	52.9	119.7	1,043
Day Visitors	512.6	701.4	623.0	1,975.3	1,605.7	1,788.6	2,503.0	2,852.8	1,609.6	1,330.1	556.6	502.8	16,561
<b>Total Tourist Numbers 000's</b>	<b>885.6</b>	<b>1,041.4</b>	<b>1,072.0</b>	<b>2,746.9</b>	<b>2,420.9</b>	<b>2,616.5</b>	<b>3,582.1</b>	<b>3,999.5</b>	<b>2,398.9</b>	<b>1,996.8</b>	<b>991.7</b>	<b>891.2</b>	<b>24,643</b>

<b>Vehicles</b>	<b>Vehicles 000's</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<b>Vehicle Days 000's</b>													
Serviced Accommodation	46.2	84.4	104.0	108.6	132.1	135.6	150.1	159.3	138.5	132.0	104.0	75.9	1,371
Non-Serviced Accommodation	101.6	133.3	302.5	705.6	861.7	890.6	1,183.4	1,354.2	822.7	620.8	215.5	119.5	7,311
SFR	106.2	35.7	40.6	96.9	62.3	48.0	77.9	82.5	42.5	42.4	33.1	95.8	764
Day Visitors	112.8	176.3	156.6	434.6	353.3	449.7	550.7	627.6	354.1	334.4	139.9	110.6	3,801
<b>Total Vehicle Days 000's</b>	<b>366.8</b>	<b>429.7</b>	<b>603.8</b>	<b>1,345.6</b>	<b>1,409.3</b>	<b>1,523.9</b>	<b>1,962.2</b>	<b>2,223.6</b>	<b>1,357.8</b>	<b>1,129.6</b>	<b>492.5</b>	<b>401.8</b>	<b>13,247</b>

<b>Vehicles</b>	<b>Vehicles 000's</b>												<b>TOTAL</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<b>Vehicle Numbers 000's</b>													
Serviced Accommodation	29.7	57.1	50.5	59.9	70.5	76.4	87.7	93.2	71.7	76.5	60.2	47.1	781
Non-Serviced Accommodation	29.9	33.3	63.0	110.3	124.9	127.2	166.7	178.2	119.2	88.7	47.9	21.3	1,111
SFR	42.5	17.0	18.9	35.9	28.3	22.9	31.2	31.7	19.6	19.8	16.3	36.8	321
Day Visitors	112.8	176.3	156.6	434.6	353.3	449.7	550.7	627.6	354.1	334.4	139.9	110.6	3,801
<b>Total Vehicle Numbers 000's</b>	<b>214.9</b>	<b>283.8</b>	<b>289.0</b>	<b>640.6</b>	<b>577.0</b>	<b>676.2</b>	<b>836.2</b>	<b>930.7</b>	<b>564.6</b>	<b>519.4</b>	<b>264.3</b>	<b>215.9</b>	<b>6,013</b>

<b>BED STOCK (number of beds)</b>	<b>BED STOCK (number of beds)</b>												<b>MAX</b>
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	24,307	25,958	27,737	30,758	30,876	30,916	30,963	30,955	30,932	30,595	27,111	26,337	30,963
Non-Serviced Accommodation	55,797	56,630	117,025	196,665	197,009	197,747	198,070	198,070	196,311	192,801	71,385	65,058	198,070
<b>Total BED STOCK (number of beds)</b>	<b>80,104</b>	<b>82,588</b>	<b>144,762</b>	<b>227,423</b>	<b>227,885</b>	<b>228,663</b>	<b>229,033</b>	<b>229,025</b>	<b>227,243</b>	<b>223,396</b>	<b>98,496</b>	<b>91,395</b>	<b>229,033</b>

## GLOSSARY OF TERMS

<b>Average direct daily expenditure</b>	derived from total direct revenue divided by the total number of visitor days
<b>Average revenue per head</b>	derived from total revenue divided by the total number of visitors
<b>Bed stock</b>	number of bed spaces
<b>Category of expenditure</b>	denotes areas of economic impact generated by: Accommodation, Food & Drink, Recreation, Shopping and Transport
<b>Category of visitor</b>	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'
<b>Commercial accommodation</b>	denotes +50 Room Hotels, 11-50 Room Hotels, <10 Room Hotels, Guest Houses/B&Bs, Self-Catering, and Touring/Camping
<b>Day visitors:</b>	
- <b>Tourist day visits</b>	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
- <b>Intra-district tourist day visits</b>	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
- <b>Leisure day visits</b>	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
<b>Direct revenue</b>	denotes visitor expenditure within a zone or Borough area

<b>Expenditure</b>	denotes expenditure on direct items (Accommodation, Food & Drink, Recreation, Shopping and Transport) and indirect items
<b>FTE</b>	denotes full-time equivalent jobs
<b>GTS (UK) Ltd</b>	Global Tourism Solutions (UK) Ltd
<b>High season</b>	from April through to October
<b>Indirect revenue</b>	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)
<b>Low season</b>	from November through to March
<b>Non-commercial accommodation</b>	denotes resident households used as accommodation by SFR
<b>Non-serviced accommodation</b>	denotes Self-Catering, and Touring/ Camping
<b>Peak month</b>	the month where the majority of the Borough's volume, value or bed space availability occurs
<b>Revenue</b>	denotes income derived from expenditure
<b>STEAM</b>	Scarborough Tourism Economic Activity Monitor
<b>Serviced accommodation</b>	denotes +50 Room Hotels, 11-50 Room Hotels, <10 Room Hotels, and Guest Houses/B&Bs
<b>Touring/Camping</b>	Touring Caravans and Camping
<b>Tourist</b>	denotes someone staying overnight
<b>SFR</b>	Staying with Friends and Relatives
<b>Visitor</b>	denotes the aggregate of tourists, Day Visitors and SFR
<b>Visitor activity</b>	denotes visitor numbers and/or visitor days (i.e. visitor volume)
<b>Visitor days</b>	denotes the total number of visitors multiplied by the average length of stay
<b>Visitor numbers</b>	denotes the total number of visitors (Tourists, Day Visitors and SFR)
<b>Zone</b>	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 CURDS<sup>1</sup> (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).

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<sup>1</sup> 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 shocks<sup>2</sup> 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 Fisher<sup>3</sup> 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.

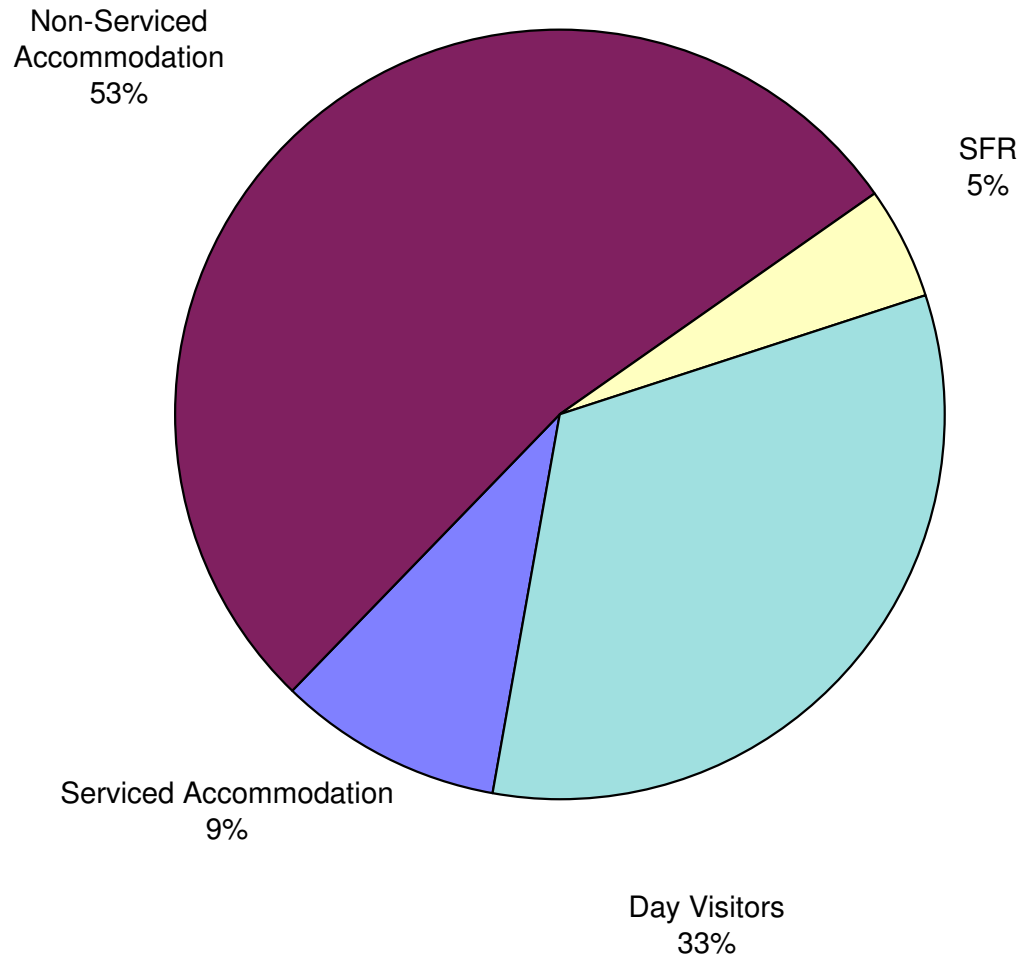
We are satisfied that STEAM offers reliable and robust outputs which our clients can place their confidence in, year on year.

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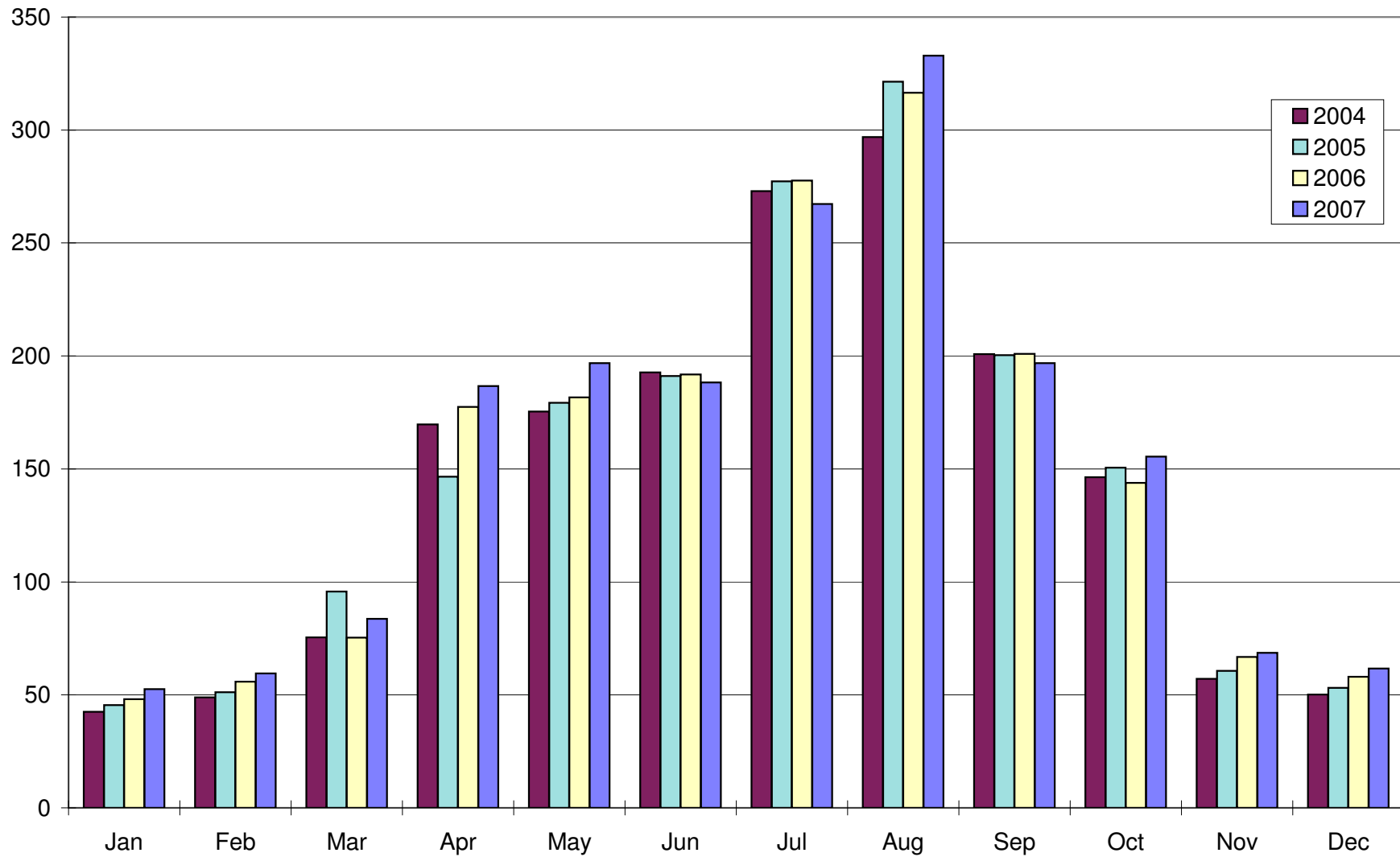
<sup>2</sup> Caused by unusual or eccentric events

<sup>3</sup> Sir Ronald Aylmer Fisher (1890 – 1967)

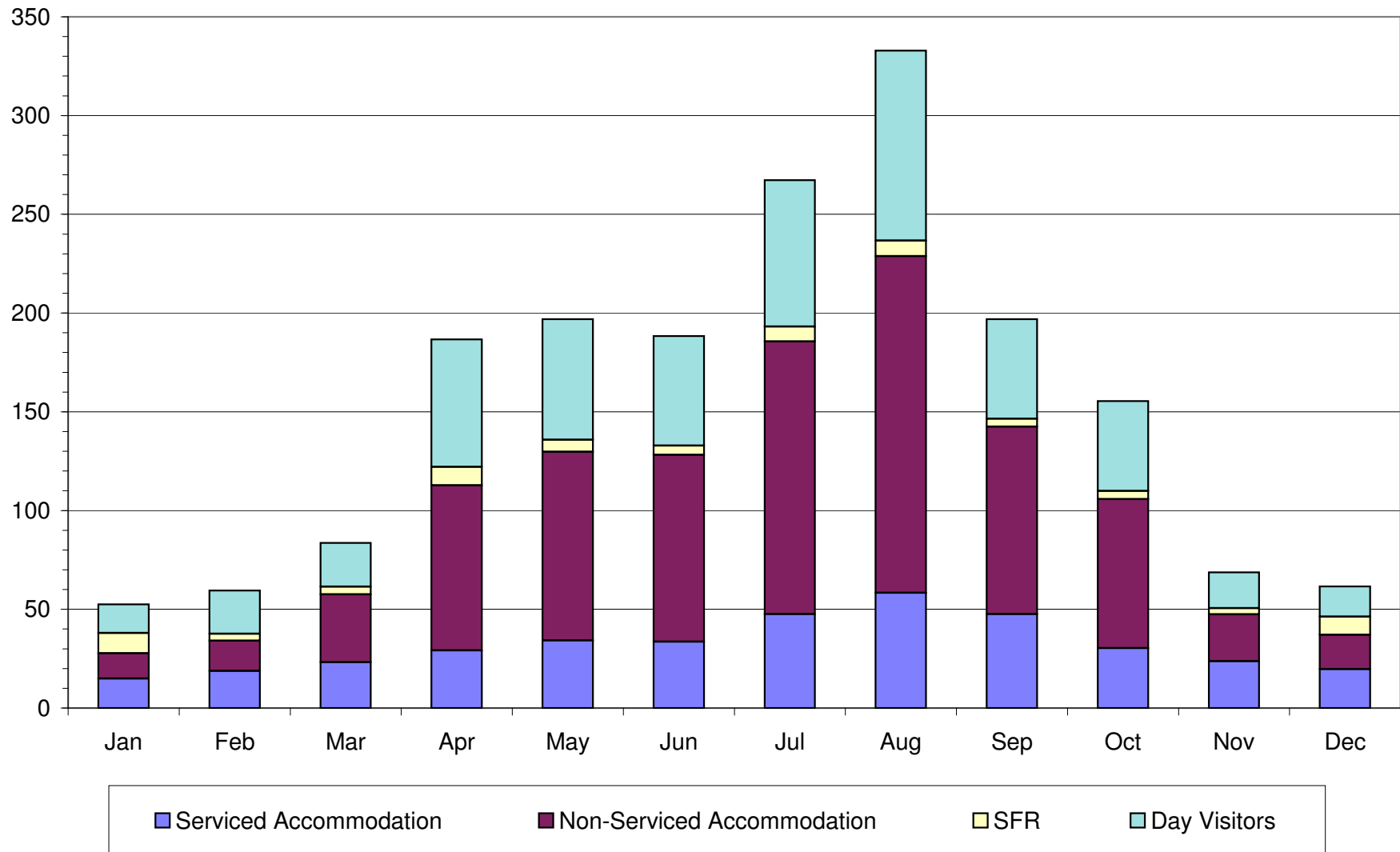
51.9 MILLION TOURIST DAYS : 2007 : BY TYPE OF TOURIST



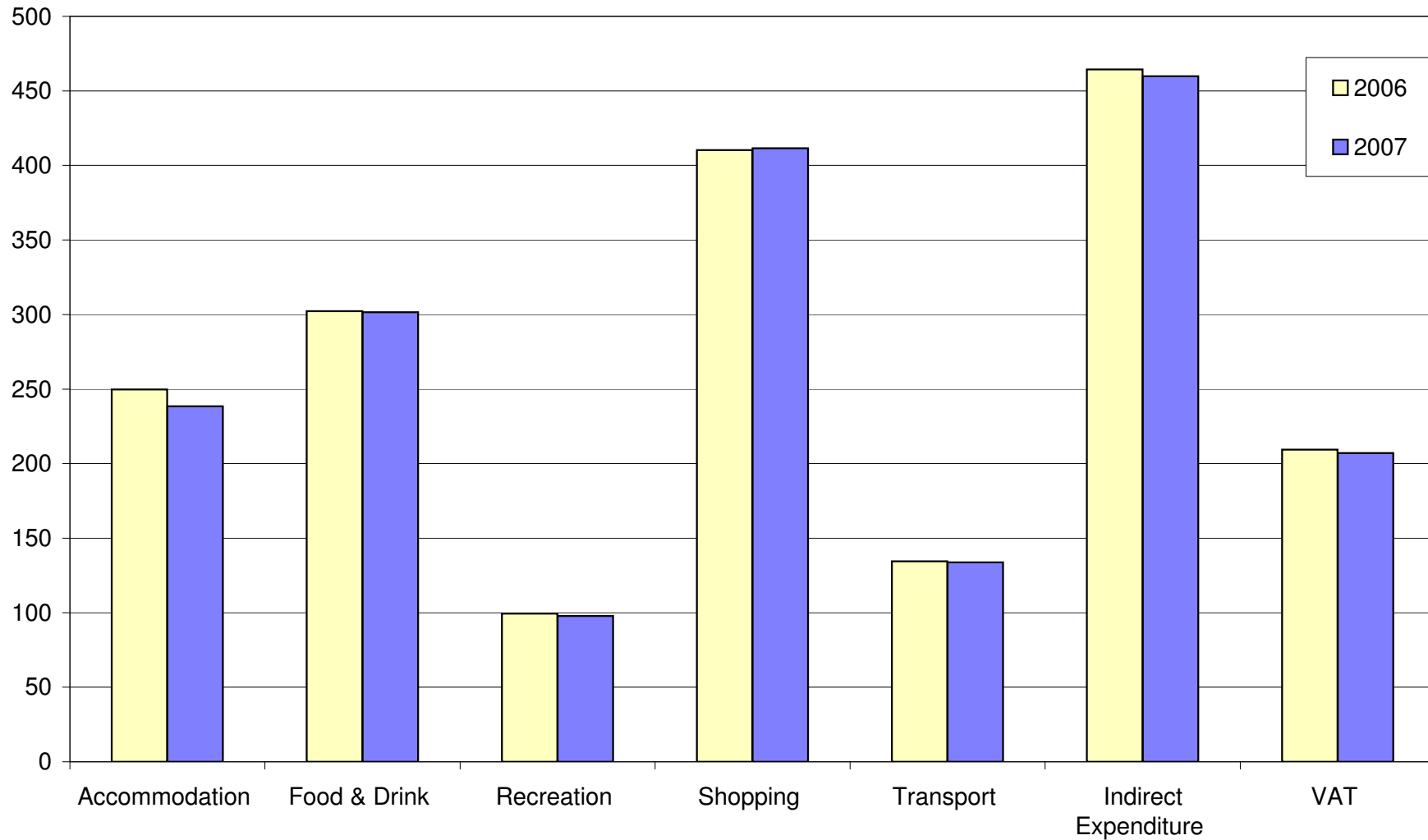
TOURISM EXPENDITURE 2004-2007: BY MONTH (£M's)



**TOURISM EXPENDITURE 2007 : BY TYPE OF TOURIST : BY MONTH (£M's)**



**TOURISM EXPENDITURE : BY INDUSTRY SECTOR  
2007 COMPARED WITH 2006 (£M's)**



**ANNUAL TOURISM EXPENDITURE (£M's)**

