

## Insects in the wind lead to less power

Peter Weiss

A folk song declares, "There ain't no bugs on me!" To that, a pair of wind-turbine researchers now can respond, "More power to you!" That's because they've shown that crusty insect remains on power-generating turbines cause what had been a perplexing loss in efficiency.

In California, wind-turbine operators have learned from experience that if they regularly wash insect debris off their turbines, they avoid performance dips. But the pattern of the dips defied the obvious explanation—that dead insects piling up on blades were slowly sapping turbine power, notes Herman F. Veldkamp of wind-turbine maker NEG Micon of Randers, Denmark.

Instead, turbine operators found that their machines' bug-encrusted vanes lost power in steps. Though operating fine in low winds, the machines could not attain full power in high winds. With each return of high winds, the step-down would be worse.

Veldkamp and Gustave P. Corten of the Energy Center of the Netherlands in Petten have sleuthed out the reason behind this. The duo report its findings in the July 5 *Nature*.

First, the scientists attached to turbine blades reflective labels with flaps that flip open if the air stops flowing smoothly over the blade surface, a sign of reduced efficiency. The researchers simulated the insectlike roughness on blade edges by applying tape. Then, using video recordings, they confirmed that roughness correlated with inefficient flow, as revealed by raised flaps on the blades.

In search of the last pieces of the puzzle, the researchers compared histories of turbine performance with weather data. They found that efficiency dipped most after periods that combined low winds, in which insects put in the most flight hours, with no rain to wash away carcasses. Wind-turbine makers are developing self-cleaning turbine blades, says Veldkamp.



<http://www.icanw.org/campaign-news/i-chose-abolition-over-los-alamos-nobel-prize-winner-jack-steinberger-joins-the-share-your-shadow-initiative/>

**"I chose abolition over Los Alamos": Nobel prize winner Jack Steinberger joins the share your shadow initiative.**

July 10, 2013.

Dr Hans Jakob "Jack" Steinberger is stark in his description of the horror of nuclear weapons. And his perspective is perhaps one that warrants special notice. A world-renowned physicist, based at CERN since 1968, Dr Steinberger's impressive career culminated in the award of the 1988 Nobel Prize in Physics for his work in the discovery of a subatomic particle called the "muon neutrino". His current work focuses on seeking solutions for what he sees as an impending energy crisis brought on by the exhaustion of fossil fuels.

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The following was originally published in The Times, and can't be accessed in full without a paid subscription. I copied it from:

<http://forests.org/shared/reader/welcome.aspx?linkid=128604&keyword=rainforest+logging+human+rights>

but there are many other links.

**Wind is not the future.**

Europe should scrap its support for wind energy as soon as possible to focus on far more efficient emerging forms of clean power generation including solar thermal energy, one of the world's most distinguished scientists said.... Professor Jack Steinberger, a Nobel prize-winning director of the CERN particle physics laboratory in Geneva, said that wind represented an illusory technology — a cul-de-sac that would prove uneconomic and a waste of resources in the battle against climate change.

"Wind is not the future," he told the symposium of Nobel laureates at the Royal Society. Instead, he said, technologies such as solar thermal power — for which parabolic mirrors reflect the Sun's rays to generate heat and electricity — represent a more promising way of supplanting fossil fuels. "I am certain that the energy of the future is going to be thermal solar," he told The Times. "There is nothing comparable. The sooner we focus on it the better."



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**CONTENTS**

<b>OVERVIEW OF STEAM</b>	Pages 1-6
<b>NUMERIC EXECUTIVE SUMMARY</b>	Pages 7-10
<b>SECTOR ANALYSIS</b>	Page 11
<b>ACCOMMODATION SUPPLY ANALYSIS</b>	Page 12
<b>TOURISM IMPACTS MONITOR</b>	Pages 13-15
<b>2007 – 2012 TREND SUMMARY</b>	Pages 16-18
<b>APPENDICES:</b>	
<b>Appendix 1 2012</b>	
Entire Area: Economic Impact (£'s 2012 actual)	Page 1.1
Entire Area: Population	Page 1.2
Entire Area: Employment	Page 1.2
Entire Area: Tourist Days / Tourist Numbers	Page 1.3
Entire Area: Vehicle Days / Vehicle Numbers	Page 1.3
Entire Area: Bed Stock	Page 1.3
 Brecknockshire: Economic Impact (£'s 2012 actual)	 Page 1.4
Brecknockshire: Population	Page 1.5
Brecknockshire: Employment	Page 1.5
Brecknockshire: Tourist Days / Tourist Numbers	Page 1.6
Brecknockshire: Vehicle Days / Vehicle Numbers	Page 1.6
Brecknockshire: Bed Stock	Page 1.6
 Montgomeryshire: Economic Impact (£'s 2012 actual)	 Page 1.7
Montgomeryshire: Population	Page 1.8
Montgomeryshire: Employment	Page 1.8
Montgomeryshire: Tourist Days / Tourist Numbers	Page 1.9
Montgomeryshire: Vehicle Days / Vehicle Numbers	Page 1.9
Montgomeryshire: Bed Stock	Page 1.9
 Radnorshire: Economic Impact (£'s 2012 actual)	 Page 1.10
Radnorshire: Population	Page 1.11
Radnorshire: Employment	Page 1.11
Radnorshire: Tourist Days / Tourist Numbers	Page 1.12
Radnorshire: Vehicle Days / Vehicle Numbers	Page 1.12
Radnorshire: Bed Stock	Page 1.12

**Appendix 2 2011**

Entire Area: Economic Impact (£'s 2011 actual)	Page 2.1
Entire Area: Population	Page 2.2
Entire Area: Employment	Page 2.2
Entire Area: Tourist Days / Tourist Numbers	Page 2.3
Entire Area: Vehicle Days / Vehicle Numbers	Page 2.3
Entire Area: Bed Stock	Page 2.3

Brecknockshire: Economic Impact (£'s 2011 actual)	Page 2.4
Brecknockshire: Population	Page 2.5
Brecknockshire: Employment	Page 2.5
Brecknockshire: Tourist Days / Tourist Numbers	Page 2.6
Brecknockshire: Vehicle Days / Vehicle Numbers	Page 2.6
Brecknockshire: Bed Stock	Page 2.6

Montgomeryshire: Economic Impact (£'s 2011 actual)	Page 2.7
Montgomeryshire: Population	Page 2.8
Montgomeryshire: Employment	Page 2.8
Montgomeryshire: Tourist Days / Tourist Numbers	Page 2.9
Montgomeryshire: Vehicle Days / Vehicle Numbers	Page 2.9
Montgomeryshire: Bed Stock	Page 2.9

Radnorshire: Economic Impact (£'s 2011 actual)	Page 2.10
Radnorshire: Population	Page 2.11
Radnorshire: Employment	Page 2.11
Radnorshire: Tourist Days / Tourist Numbers	Page 2.12
Radnorshire: Vehicle Days / Vehicle Numbers	Page 2.12
Radnorshire: Bed Stock	Page 2.12

<b>Appendix 3</b>	
Glossary of Terms	Page 3.1-3.2

<b>Appendix 4</b>	
Economic Effects	Page 4.1

<b>Appendix 5</b>	
Employment	Page 5.1

<b>Appendix 6</b>	
Day visitors and their impacts in STEAM	Page 6.1-6.2

<b>Appendix 7</b>	
Statistical confidence levels in STEAM	Page 7.1

**CHARTS**

Tourist Days	Chart 1
Tourism Expenditure: By Month	Chart 2
Tourism Expenditure 2012: By Type of Tourist: By Month	Chart 3
Tourism Expenditure: By Industry Sector: 2012 & 2011	Chart 4
Annual Tourism Expenditure 2009-2012	Chart 5

**OVERVIEW OF STEAM****1. INTRODUCTION**

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

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

**2. VALIDATION OF STEAM**

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

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

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

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

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



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

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

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

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

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

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

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

At its next meeting, 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.

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**POWYS COUNTY COUNCIL  
STEAM Report 2012  
Numeric Executive Summary**

Issued 15 July 2013

Total Revenue by District (£'s millions)	2012	2011	% change
Brecknockshire	180.8	212.0	-15
Montgomeryshire	383.7	410.5	-7
Radnorshire	91.5	102.9	-11
<b>TOTAL</b>	<b>656.0</b>	<b>725.3</b>	<b>-10</b>

Analysis by Sector of Expenditure (£'s millions)	2012	2011	% change
Accommodation	72.8	79.5	-8
Food and drink	116.1	128.2	-9
Recreation	39.6	43.9	-10
Shopping	88.9	98.4	-10
Transport	92.1	102.2	-10
Indirect Expenditure	164.6	182.6	-10
VAT	81.9	90.4	-9
<b>TOTAL</b>	<b>656.0</b>	<b>725.3</b>	<b>-10</b>

Revenue by Category of Visitor (£'s millions)	2012	2011	% change
Serviced Accommodation	91.4	92.1	-1
Non-Serviced Accommodation	454.8	519.2	-12
SFR	26.6	26.3	1
Day Visitors	83.2	87.7	-5
<b>TOTAL</b>	<b>656.0</b>	<b>725.3</b>	<b>-10</b>

Tourist Days (Millions)	2012	2011	% change
Serviced Accommodation	0.7	0.7	-0
Non-Serviced Accommodation	5.9	6.7	-12
SFR	0.5	0.5	1
Day Visitors	2.9	3.0	-5
<b>TOTAL</b>	<b>9.9</b>	<b>10.9</b>	<b>-9</b>

Tourist Numbers (Millions)	2012	2011	% change
Serviced Accommodation	0.4	0.4	0
Non-Serviced Accommodation	0.8	0.9	-13
SFR	0.2	0.2	1
Day Visitors	2.9	3.0	-5
<b>TOTAL</b>	<b>4.3</b>	<b>4.5</b>	<b>-6</b>

Sectors in which Employment is supported (FTE's)	2012	2011	% change
Direct Employment			
Accommodation	3,375	3,383	-0
Food & Drink	2,388	2,637	-9
Recreation	990	1,095	-10
Shopping	1,668	1,846	-10
Transport	846	939	-10
Total Direct Employment	9,266	9,900	-6
Indirect Employment	2,187	2,427	-10
<b>TOTAL</b>	<b>11,453</b>	<b>12,327</b>	<b>-7</b>

**BRECKNOCKSHIRE  
STEAM Report 2012  
Numeric Executive Summary**

Issued 15 July 2013

Analysis by Sector of Expenditure (£'s millions)	2012	2011	% change
Accommodation	22.78	25.91	-12
Food & Drink	31.45	36.85	-15
Recreation	10.58	12.45	-15
Shopping	23.72	27.95	-15
Transport	23.82	28.32	-16
<b>Total Direct Revenue</b>	<b>112.35</b>	<b>131.49</b>	<b>-15</b>
Indirect Expenditure	46.03	54.21	-15
VAT	22.47	26.30	-15
<b>TOTAL</b>	<b>180.84</b>	<b>212.00</b>	<b>-15</b>

Revenue by Category of Visitor (£'s millions)	2012	2011	% change
Serviced Accommodation	38.38	38.68	-1
Non-Serviced Accommodation	94.06	122.54	-23
SFR	8.96	8.85	1
Day Visitors	39.44	41.92	-6
<b>TOTAL</b>	<b>180.84</b>	<b>212.00</b>	<b>-15</b>

Tourist Days (Thousands)	2012	2011	% change
Serviced Accommodation	289.5	300.5	-0
Non-Serviced Accommodation	1,112.4	1,449.3	-23
SFR	164.7	162.6	1
Day Visitors	1,357.6	1,443.1	-6
<b>TOTAL</b>	<b>2,934.3</b>	<b>3,355.5</b>	<b>-13</b>

Tourist Numbers (Thousands)	2012	2011	% change
Serviced Accommodation	168.6	168.5	0
Non-Serviced Accommodation	166.5	215.9	-23
SFR	69.2	68.3	1
Day Visitors	1,357.6	1,443.1	-6
<b>TOTAL</b>	<b>1,761.8</b>	<b>1,895.8</b>	<b>-7</b>

Sectors in which Employment is supported (FTE's)	2012	2011	% change
<b>Direct Employment</b>			
Accommodation	1,546	1,556	-1
Food & Drink	647	758	-15
Recreation	264	311	-15
Shopping	445	524	-15
Transport	219	260	-16
<b>Total Direct Employment</b>	<b>3,121</b>	<b>3,409</b>	<b>-8</b>
Indirect Employment	612	720	-15
<b>TOTAL</b>	<b>3,732</b>	<b>4,130</b>	<b>-10</b>

**MONTGOMERYSHIRE  
STEAM Report 2012  
Numeric Executive Summary**

Issued 15 July 2013

Analysis by Sector of Expenditure (£'s millions)	2012	2011	% change
Accommodation	35.60	39.21	-7
Food & Drink	68.98	73.65	-6
Recreation	23.81	25.44	-6
Shopping	53.65	57.30	-6
Transport	56.52	60.48	-7
<b>Total Direct Revenue</b>	<b>239.55</b>	<b>256.09</b>	<b>-6</b>
Indirect Expenditure	96.22	103.15	-7
VAT	47.91	51.22	-6
<b>TOTAL</b>	<b>383.68</b>	<b>410.45</b>	<b>-7</b>

Revenue by Category of Visitor (£'s millions)	2012	2011	% change
Serviced Accommodation	26.71	26.92	-1
Non-Serviced Accommodation	312.81	339.45	-8
SFR	12.30	12.14	1
Day Visitors	31.87	31.94	-0
<b>TOTAL</b>	<b>383.68</b>	<b>410.45</b>	<b>-7</b>

Tourist Days (Thousands)	2012	2011	% change
Serviced Accommodation	204.7	205.4	-0
Non-Serviced Accommodation	4,164.1	4,498.8	-7
SFR	226.0	223.1	1
Day Visitors	1,096.9	1,099.6	-0
<b>TOTAL</b>	<b>5,691.7</b>	<b>6,026.9</b>	<b>-6</b>

Tourist Numbers (Thousands)	2012	2011	% change
Serviced Accommodation	110.5	110.4	0
Non-Serviced Accommodation	552.9	601.8	-8
SFR	94.9	93.7	1
Day Visitors	1,096.9	1,099.6	-0
<b>TOTAL</b>	<b>1,855.2</b>	<b>1,905.6</b>	<b>-3</b>

Sectors in which Employment is supported (FTE's)	2012	2011	% change
<b>Direct Employment</b>			
Accommodation	1,104	1,101	0
Food & Drink	1,419	1,515	-6
Recreation	594	635	-6
Shopping	1,006	1,075	-6
Transport	519	556	-7
<b>Total Direct Employment</b>	<b>4,642</b>	<b>4,881</b>	<b>-5</b>
Indirect Employment	1,279	1,371	-7
<b>TOTAL</b>	<b>5,921</b>	<b>6,252</b>	<b>-5</b>

All £'s 2012 Indexed  
(RPI Factor 11/12 +1.0393)

**RADNORSHIRE  
STEAM Report 2012  
Numeric Executive Summary**

Issued 15 July 2013

Analysis by Sector of Expenditure (£'s millions)	2012	2011	% change
Accommodation	13.43	14.40	-7
Food & Drink	15.65	17.71	-12
Recreation	5.26	5.97	-12
Shopping	11.57	13.18	-12
Transport	11.72	13.41	-13
<b>Total Direct Revenue</b>	<b>57.62</b>	<b>64.66</b>	<b>-11</b>
Indirect Expenditure	22.32	25.27	-12
VAT	11.52	12.93	-11
<b>TOTAL</b>	<b>91.47</b>	<b>102.86</b>	<b>-11</b>

Revenue by Category of Visitor (£'s millions)	2012	2011	% change
Serviced Accommodation	26.31	26.47	-1
Non-Serviced Accommodation	47.91	57.26	-16
SFR	5.35	5.28	1
Day Visitors	11.91	13.85	-14
<b>TOTAL</b>	<b>91.47</b>	<b>102.86</b>	<b>-11</b>

Tourist Days (Thousands)	2012	2011	% change
Serviced Accommodation	211.4	212.0	-0
Non-Serviced Accommodation	594.7	709.2	-16
SFR	98.3	97.0	1
Day Visitors	409.8	476.7	-14
<b>TOTAL</b>	<b>1,314.2</b>	<b>1,494.9</b>	<b>-12</b>

Tourist Numbers (Thousands)	2012	2011	% change
Serviced Accommodation	108.1	107.9	0
Non-Serviced Accommodation	85.3	102.1	-16
SFR	41.3	40.8	1
Day Visitors	409.8	476.7	-14
<b>TOTAL</b>	<b>644.5</b>	<b>727.4</b>	<b>-11</b>

Sectors in which Employment is supported (FTE's)	2012	2011	% change
<b>Direct Employment</b>			
Accommodation	725	726	-0
Food & Drink	322	364	-12
Recreation	131	149	-12
Shopping	217	247	-12
Transport	108	123	-13
<b>Total Direct Employment</b>	<b>1,503</b>	<b>1,609</b>	<b>-7</b>
Indirect Employment	297	336	-12
<b>TOTAL</b>	<b>1,800</b>	<b>1,945</b>	<b>-7</b>

**Economic Impact Analysis by Category of Tourist and by Industrial Sector**

**Powys**

**Analysis by Category by Sector of Expenditure**

Serviced Accommodation Analysis by Sector of Expenditure (£'s millions)	2012
Accommodation	27.72
Food & Drink	13.35
Recreation	4.27
Shopping	7.40
Transport	7.50
<b>Total Direct Revenue</b>	<b>60.24</b>
VAT	12.05
<b>Total Direct Expenditure</b>	<b>72.29</b>

Non-Serviced Accommodation Analysis by Sector of Expenditure (£'s millions)	2012
Accommodation	45.09
Food & Drink	79.13
Recreation	27.63
Shopping	62.04
Transport	67.15
<b>Total Direct Revenue</b>	<b>281.04</b>
VAT	56.21
<b>Total Direct Expenditure</b>	<b>337.24</b>

SFR Analysis by Sector of Expenditure (£'s millions)	2012
Food & Drink	5.43
Recreation	1.85
Shopping	5.14
Transport	4.42
<b>Total Direct Revenue</b>	<b>16.83</b>
VAT	3.37
<b>Total Direct Expenditure</b>	<b>20.19</b>

Day Visitors Analysis by Sector of Expenditure (£'s millions)	2012
Food & Drink	18.17
Recreation	5.90
Shopping	14.35
Transport	12.99
<b>Total Direct Revenue</b>	<b>51.41</b>
VAT	10.28
<b>Total Direct Expenditure</b>	<b>61.70</b>

Analysis by Sector of Expenditure (£'s millions)	2012
Accommodation	72.81
Food & Drink	116.08
Recreation	39.64
Shopping	88.93
Transport	92.05
VAT	81.90
<b>Total Direct Expenditure</b>	<b>491.42</b>
Indirect Expenditure	164.57
<b>Total Economic Impact</b>	<b>656.00</b>

### STEAM Bedstock Analysis

Accommodation Category	Powys 2012		Powys 2011	
	Establishments	Beds / Sleeping Spaces	Establishments	Beds / Sleeping Spaces
<b>Serviced Accommodation</b>				
+50 room hotels	4	564	4	564
11-50 room hotels	51	2176	51	2176
<10 room hotels/others	507	4049	507	4049
<b>Serviced Total</b>	<b>562</b>	<b>6789</b>	<b>562</b>	<b>6789</b>
<b>Non-Serviced Accommodation</b>				
Self catering	692	5212	692	5212
Static caravans/chalets	140	14288	140	14288
Touring caravans/camping	155	12168	155	12168
Not-for-hire statics		11240		11240
<b>Non-Serviced Accommodation Total</b>	<b>987</b>	<b>42908</b>	<b>987</b>	<b>42908</b>
<b>TOTAL</b>	<b>1,549</b>	<b>49,697</b>	<b>1,549</b>	<b>49,697</b>

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### Tourism Impacts 2012

	UK	World
<b>January</b>	Weather mild. Economy forecast to be in recession for the first 6 months of 2012. UK inflation rate fell.	
<b>February</b>	Colder weather with snow at beginning of month, becoming milder with above average temperatures and below average rainfall. Leap year so 29 days in February.	Price of oil high.
<b>March</b>	Warmest and driest March since the 1950s.	Renewed fears about Eurozone economic crisis.
<b>April</b>	Wettest April on record, with temperatures and sunshine below average. UK officially entered recession in first 3 months of 2012. Easter Sunday April 8 <sup>th</sup> .	

Prepared by Cathy James, GTS (UK) Ltd

March 2013

<b>May</b>	First half of month cool and wet; second half warm and dry. Late May Spring Bank holiday moved to June 25 <sup>th</sup> – 26 <sup>th</sup> May – Olympic Torch relay stages in Wales	OECD says that the Eurozone crisis is the single biggest threat to the global economic outlook. Slowing economic activity in India and China.
<b>June</b>	Wettest June since records began, with flooding in Wales. 4 <sup>th</sup> and 5 <sup>th</sup> of June – Spring Bank Holiday and Queen's Diamond Jubilee Holiday.	
<b>July</b>	Coolest July since 2000, with sunshine below average and rainfall considerably above average. 27 <sup>th</sup> July – opening ceremony of London 2012 Olympics	Global food prices rose by 10% in July.
<b>August</b>	Average sunshine and temperatures with above average rainfall. The June-August period was the wettest in the UK since 2012. OECD forecast the UK economy to shrink by 0.7% in 2012. 12 <sup>th</sup> August – Olympics closing ceremony 29 <sup>th</sup> August – Paralympics opening ceremony	

<b>September</b>	Weather sunnier and wetter than average. 9 <sup>th</sup> September – Paralympics closing ceremony	
<b>October</b>	Temperatures well below average.	
<b>November</b>	Some parts of UK had double the average rainfall, with flooding in Wales and SW England at the end of the month	
<b>December</b>	Weather sunnier and wetter than average.	

**POWYS COUNTY COUNCIL  
6 Year Summary**

All £'s 2012 indexed

Issued 15 July 2013

Analysis by Sector of Expenditure (£'s millions)	2012	2011	2010	2009	2008	2007
Accommodation	72.8	79.5	76.9	77.5	84.1	78.6
Food & Drink	116.1	128.2	126.5	126.2	132.4	124.8
Recreation	39.6	43.9	43.3	43.1	45.1	42.5
Shopping	88.9	98.4	97.1	96.9	101.4	95.6
Transport	92.1	102.2	100.7	100.4	104.7	98.2
Indirect Expenditure	164.6	182.6	175.3	175.2	184.7	174.1
VAT	81.9	90.4	77.8	77.7	81.9	76.9
<b>TOTAL</b>	<b>656.0</b>	<b>725.3</b>	<b>697.7</b>	<b>697.2</b>	<b>734.3</b>	<b>690.7</b>

Revenue by Category of Visitor (£'s millions)	2012	2011	2010	2009	2008	2007
Serviced Accommodation	91.4	92.1	89.3	89.0	101.1	97.1
Non-Serviced Accommodation	454.8	519.2	494.8	491.1	513.4	469.6
SFR	26.6	26.3	26.4	26.5	26.4	26.2
Day Visitors	83.2	87.7	87.2	90.5	93.4	97.8
<b>TOTAL</b>	<b>656.0</b>	<b>725.3</b>	<b>697.7</b>	<b>697.2</b>	<b>734.3</b>	<b>690.7</b>

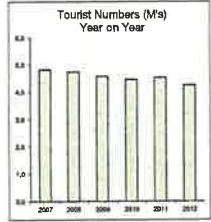
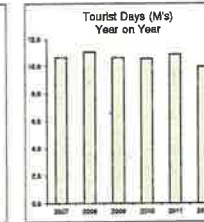
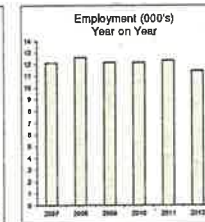
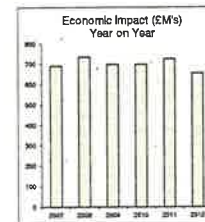
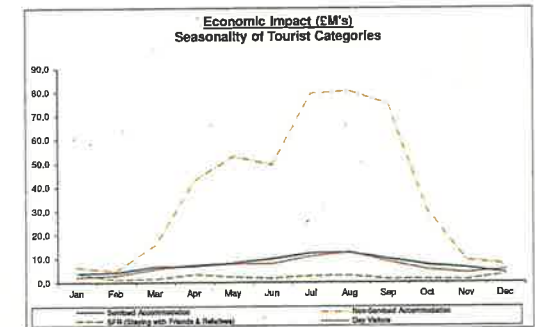
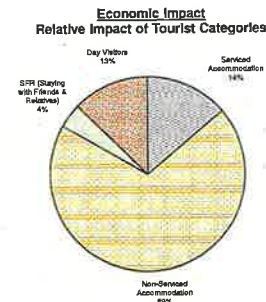
Tourist Days (Thousands)	2012	2011	2010	2009	2008	2007
Serviced Accommodation	716	718	697	695	780	751
Non-Serviced Accommodation	5,871	6,657	6,371	6,326	6,581	6,055
SFR	489	483	484	488	485	482
Day Visitors	2,864	3,019	3,001	3,116	3,216	3,373
<b>TOTAL</b>	<b>9,940</b>	<b>10,877</b>	<b>10,554</b>	<b>10,625</b>	<b>11,062</b>	<b>10,661</b>

Tourist Numbers (Thousands)	2012	2011	2010	2009	2008	2007
Serviced Accommodation	387	387	376	373	419	406
Non-Serviced Accommodation	805	920	874	876	909	840
SFR	205	203	203	205	204	202
Day Visitors	2,864	3,019	3,001	3,116	3,216	3,373
<b>TOTAL</b>	<b>4,262</b>	<b>4,529</b>	<b>4,455</b>	<b>4,571</b>	<b>4,748</b>	<b>4,821</b>

Sectors in which Employment is supported (FTE's)	2012	2011	2010	2009	2008	2007
<b>Direct Employment</b>						
Accommodation	3,375	3,383	3,346	3,361	3,365	3,397
Food & Drink	2,388	2,637	2,602	2,596	2,723	2,566
Recreation	990	1,095	1,080	1,077	1,126	1,060
Shopping	1,668	1,846	1,821	1,818	1,902	1,792
Transport	846	939	926	923	963	903
Total Direct Employment	9,266	9,900	9,775	9,775	10,078	9,718
Indirect Employment	2,187	2,427	2,380	2,378	2,506	2,363
<b>TOTAL</b>	<b>11,453</b>	<b>12,327</b>	<b>12,155</b>	<b>12,152</b>	<b>12,585</b>	<b>12,081</b>

**Powys 2012**

Indexation to 2012



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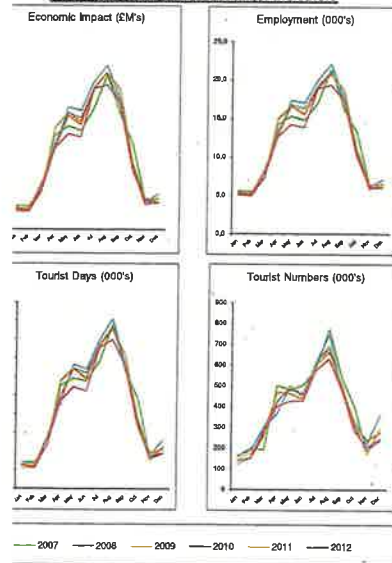
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POWYS 2012

### Seasonality Comparisons of Major Indicators

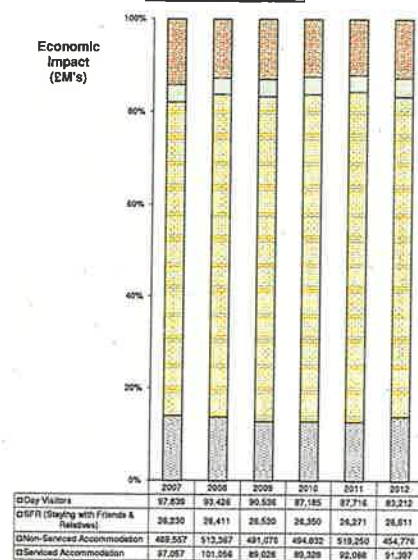


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Indexation to 2012

### Relative Impact Changes



ETWELSPORALLPOWYCC/POWYS

POWYS 2012

POWYS COUNTY COUNCIL 2012

Appendix 1.1

Economic Impact		Expenditure and Revenue £'000's												TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	12,000	10,048	22,119	45,476	53,642	51,989	78,984	81,132	71,162	38,415	15,863	15,541	491,421	
Indirect Expenditure	4,041	3,402	7,314	15,365	17,944	17,326	26,417	27,230	22,729	11,218	5,238	5,293	164,574	
Total	16,101	13,450	29,433	60,841	71,586	69,306	105,401	108,361	94,951	44,632	21,100	20,834	655,995	

Economic Impact		Expenditure and Revenue £'000's												TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	10,850	8,373	18,432	37,898	44,702	43,317	68,820	87,610	99,301	27,848	13,218	12,950	499,518	
Indirect Expenditure	4,041	3,402	7,314	15,365	17,944	17,326	26,417	27,230	22,729	11,218	5,238	5,293	164,574	
VAT	2,010	1,675	3,696	7,576	8,940	8,663	13,164	13,522	11,860	5,569	2,644	2,696	81,804	
Total	16,101	13,450	29,433	60,841	71,586	69,306	105,401	108,361	94,951	44,632	21,100	20,834	655,995	

Economic Impact		Categories giving rise to tourism expenditure												TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	3,608	4,161	6,567	6,792	6,309	8,880	12,327	12,465	9,791	7,272	6,150	4,134	91,597	
Non-Serviced Accommodation	4,416	4,944	15,786	47,957	53,104	43,832	79,244	80,274	74,752	30,251	9,363	7,851	464,776	
GFR	2,701	1,243	1,415	3,375	2,171	1,672	2,714	2,873	1,480	1,478	1,152	2,358	26,411	
Day Visitors	2,376	3,100	5,725	7,716	8,162	8,121	11,116	12,749	8,808	5,531	4,238	5,513	82,212	
Total	16,101	13,450	29,433	60,841	71,586	69,306	105,401	108,361	94,951	44,632	21,100	20,834	655,995	

Economic Impact		Sectors in which expenditure is made												TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	1,524	1,674	3,047	5,743	7,077	8,985	13,042	12,615	12,551	4,351	2,348	1,853	72,809	
Food & Drink	2,859	2,381	6,397	11,035	12,924	12,542	18,096	18,866	16,000	8,141	3,891	3,875	116,079	
Recreation	921	796	1,621	2,773	4,428	4,398	6,307	6,464	5,499	2,776	1,292	1,296	39,645	
Shopping	2,316	1,770	4,054	6,501	9,922	9,547	12,923	14,525	13,311	6,733	2,849	2,907	88,851	
Transport	2,253	1,742	4,115	8,813	10,350	9,955	14,552	15,148	12,941	6,405	2,867	2,917	62,024	
Total Direct Expenditure	10,850	8,373	18,432	37,898	44,702	43,317	68,820	87,610	99,301	27,848	13,218	12,950	499,518	
Indirect Expenditure	2,010	1,675	3,696	7,576	8,940	8,663	13,164	13,522	11,860	5,569	2,644	2,696	81,804	
VAT	4,041	3,402	7,314	15,365	17,944	17,326	26,417	27,230	22,729	11,218	5,238	5,293	164,574	
Total	16,101	13,450	29,433	60,841	71,586	69,306	105,401	108,361	94,951	44,632	21,100	20,834	655,995	

Prepared by CJ

ETWELSPORALLPOWYCC/POWYS

Population														Avg
Total Population	120,000	133,000	133,000	133,000	133,000	133,000	133,000	133,000	133,000	133,000	133,000	133,000	133,000	132,000
Employment	Supported by tourism activity in these categories													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Accommodation	2,119	2,187	2,417	2,477	2,801	2,741	2,788	2,790	2,611	2,533	2,382	2,185	2,485	
Service Accommodation	1,946	1,637	2,089	2,347	2,488	2,154	10,162	10,244	9,748	5,020	2,268	2,001	8,576	
Non-Serviced Accommodation	492	185	185	448	298	222	381	382	197	196	153	443	595	
SFR	312	407	751	1,012	1,050	1,065	1,458	1,872	1,171	725	558	229	910	
Day Visitors	4,768	4,397	8,345	10,284	11,440	11,182	14,787	15,091	13,726	8,478	6,359	5,352	9,289	
Total Direct Employment	644	543	1,166	2,450	2,851	2,763	4,213	4,342	3,794	1,789	835	844	2,187	
Indirect Employment	5,413	4,939	7,511	12,734	14,301	13,945	18,979	19,433	17,520	10,266	6,194	6,197	11,453	
Total	5,413	4,939	7,511	12,734	14,301	13,945	18,979	19,433	17,520	10,266	6,194	6,197	11,453	
Employment	Sectors in which employment is supported													FTE's
Direct Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Accommodation	2,070	2,078	3,100	3,538	3,650	3,557	3,703	3,561	3,933	3,641	3,061	3,009	3,375	
Food & Drink	730	590	1,202	2,724	3,190	3,096	4,467	4,565	3,949	2,950	953	951	3,721	
Recreation	299	239	546	1,013	1,206	1,204	1,919	1,919	1,871	821	589	739	955	
Transport	621	398	912	1,920	2,233	2,148	3,133	3,248	2,730	1,589	641	677	1,668	
Transit	248	192	454	972	1,141	1,008	1,805	1,875	1,427	706	310	329	946	
Total Direct Employment	4,768	4,397	6,345	10,284	11,440	11,182	14,787	15,091	13,726	8,478	6,359	5,352	9,289	
Indirect Employment	1,644	1,443	2,450	2,851	2,763	4,213	4,342	3,794	3,166	1,789	835	844	2,187	
Total	5,413	4,939	7,511	12,734	14,301	13,945	18,979	19,433	17,520	10,266	6,194	6,197	11,453	

Tourists														TOTAL
Tourist Days 000's														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	30.3	34.9	54.1	56.4	58.5	82.1	86.1	87.1	83.4	81.9	81.6	84.2	71.5	8,971
Non-Serviced Accommodation	34.8	41.1	213.3	265.7	704.6	456.3	1,001.9	1,019.1	924.9	407.8	131.2	101.5	8,971	
SFR	68.0	22.9	29.9	62.0	29.9	20.7	49.9	52.8	27.2	27.2	21.2	61.3	499	
Day Visitors	81.8	106.7	197.1	265.6	278.9	279.5	382.6	438.8	307.3	190.4	145.8	189.8	2,884	
Total Tourist Days 000's	264.7	225.6	460.4	849.8	1,091.6	1,248.7	1,520.5	1,597.8	1,327.3	887.0	349.8	387.3	9,940	

Tourists														TOTAL
Tourist Numbers 000's														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	16.5	22.4	30.2	30.3	36.3	48.5	41.2	43.3	32.4	31.9	32.9	19.0	387	
Non-Serviced Accommodation	18.8	12.9	34.9	80.8	85.3	87.7	133.0	126.6	127.7	52.9	19.8	15.0	805	
SFR	27.2	10.8	12.1	22.0	18.1	14.6	20.0	20.3	12.5	12.7	10.4	23.0	220	
Day Visitors	61.8	106.7	197.1	265.6	278.9	279.5	382.6	438.8	307.3	190.4	145.8	189.8	2,884	
Total Tourist Numbers 000's	141.3	152.9	273.7	402.6	439.6	450.3	578.9	631.1	480.0	287.9	208.6	247.4	4,292	

Vehicles														TOTAL
Vehicle Days 000's														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	7.8	12.2	19.6	14.8	19.7	22.9	22.6	22.8	17.9	17.0	14.2	9.1	201	
Non-Serviced Accommodation	19.8	18.0	48.6	129.9	158.3	150.2	223.2	220.9	210.2	91.3	29.8	20.8	1,329	
SFR	20.2	6.8	7.7	18.4	11.8	9.1	14.8	15.7	8.1	8.1	8.3	18.2	145	
Day Visitors	18.2	24.1	44.5	52.3	55.1	63.1	35.8	66.7	60.7	43.0	30.9	37.3	582	
Total Vehicle Days 000's	64.0	61.0	120.4	211.6	244.9	247.3	336.2	305.7	299.9	159.9	83.1	65.4	2,258	

Vehicles														TOTAL
Vehicle Numbers 000's														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	4.1	7.8	11.0	8.7	10.4	13.5	10.9	11.3	8.5	8.8	8.9	5.0	109	
Non-Serviced Accommodation	4.1	4.0	8.0	18.1	21.5	20.4	29.7	29.2	29.1	11.9	4.6	3.1	164	
SFR	8.1	3.2	3.6	6.8	5.4	4.3	5.9	6.0	3.9	3.8	3.1	7.8	87	
Day Visitors	18.2	24.1	44.5	52.3	55.1	63.1	35.8	66.7	60.7	43.0	30.9	37.3	582	
Total Vehicle Numbers 000's	32.4	39.1	67.2	86.0	92.4	101.4	122.1	130.2	105.1	67.3	49.3	32.3	946	

BED STOCK (number of beds)														MAX
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	8,422	8,581	8,688	8,781	8,773	8,781	8,788	8,794	8,789	8,783	8,697	8,569	6,789	
Non-Serviced Accommodation	13,546	11,294	21,718	42,858	42,814	42,904	42,908	42,909	42,896	42,703	18,116	13,094	42,900	
BED STOCK (number of beds)	20,038	17,785	26,406	49,419	49,587	49,685	49,696	49,699	49,685	49,486	25,373	11,663	49,689	

Economic Impact		Expenditure												£000's	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Direct Expenditure		4,307	4,228	5,469	12,408	12,929	14,131	18,848	22,988	18,893	9,896	5,990	7,359		134,817
Indirect Expenditure		1,481	1,467	1,818	4,304	4,410	4,775	6,335	7,848	5,730	3,404	1,921	2,533		46,027
Total		5,788	5,695	7,287	16,712	17,334	18,906	24,983	30,837	22,593	13,299	7,917	9,793		180,844

Economic Impact		Expenditure and Revenue												£000's	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Direct Revenue		3,569	3,523	4,557	10,340	10,771	11,775	15,540	19,157	14,052	8,246	4,746	6,049		112,348
Indirect Expenditure		1,481	1,467	1,818	4,304	4,410	4,775	6,335	7,848	5,730	3,404	1,921	2,533		46,027
VAT		718	705	911	2,068	2,154	2,355	3,108	3,831	2,810	1,849	949	1,210		22,470
Total		5,768	5,695	7,287	16,712	17,334	18,906	24,983	30,837	22,593	13,299	7,617	9,793		180,844

Economic Impact		Generated by Category of Visitor												£000's	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Serviced Accommodation		1,471	1,729	2,737	2,839	3,430	4,123	5,258	5,320	4,176	3,040	2,547	1,713		38,382
Non-Serviced Accommodation		1,827	2,149	2,918	8,875	8,967	10,900	15,060	18,685	13,550	6,537	2,101	2,486		94,061
SFR		1,247	419	476	1,137	731	583	914	968	498	498	388	1,124		8,963
Day Visitors		1,243	1,398	1,157	3,861	4,305	3,519	3,745	5,665	4,369	3,225	2,581	4,470		39,439
Total		5,788	5,695	7,287	16,712	17,334	18,906	24,983	30,837	22,593	13,299	7,617	9,793		180,844

Economic Impact		Sectors in which expenditure is made												£000's	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Direct Expenditure		650	754	1,120	1,777	1,922	2,290	3,707	4,091	3,149	1,545	970	803		22,778
Accommodation		1,033	993	1,241	2,968	3,105	3,333	4,128	5,241	3,801	2,370	1,368	1,851		31,453
Food & Drink		344	329	413	1,007	1,043	1,125	1,399	1,775	1,288	794	450	612		10,577
Recreation		799	731	893	2,284	2,341	2,489	3,117	3,992	2,880	1,767	896	1,432		23,720
Shopping		762	717	890	2,284	2,349	2,538	3,189	4,058	2,937	1,770	963	1,351		23,819
Transport		718	705	911	2,068	2,154	2,355	3,108	3,831	2,810	1,849	949	1,210		22,470
Total Direct Expenditure		3,569	3,523	4,557	10,340	10,771	11,775	15,540	19,157	14,052	8,246	4,746	6,049		112,348
VAT		718	705	911	2,068	2,154	2,355	3,108	3,831	2,810	1,849	949	1,210		22,470
Indirect Expenditure		1,481	1,467	1,818	4,304	4,410	4,775	6,335	7,848	5,730	3,404	1,921	2,533		46,027
Total		5,768	5,695	7,287	16,712	17,334	18,906	24,983	30,837	22,593	13,299	7,617	9,793		180,844

Population		Supported by tourism activity in these categories												FTE's	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Serviced Accommodation		902	944	1,039	1,058	1,107	1,164	1,183	1,187	1,110	1,081	1,020	942		1,061
Non-Serviced Accommodation		915	851	947	1,691	1,715	1,934	2,318	2,698	2,189	1,453	856	880		1,529
SFR		188	59	63	151	97	75	121	129	66	66	52	149		69
Day Visitors		163	183	152	525	522	435	401	769	573	423	539	586		431
Total Direct Employment		2,047	2,034	2,201	3,404	3,471	3,608	4,114	4,763	3,938	3,024	2,266	2,558		3,121
Indirect Employment		236	234	290	686	703	762	1,010	1,252	914	543	306	404		612
Total		2,283	2,268	2,491	4,090	4,174	4,369	5,124	6,034	4,852	3,567	2,573	2,962		3,732

Employment		Sectors in which employment is supported												FTE's	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Accommodation		1,425	1,447	1,472	1,599	1,606	1,808	1,823	1,611	1,643	1,628	1,464	1,447		1,546
Food & Drink		255	245	306	738	768	829	1,019	1,294	938	585	334	487		647
Recreation		103	99	124	302	313	337	419	532	385	238	135	183		264
Shopping		180	164	201	514	527	560	701	898	648	398	224	322		445
Transport		84	79	98	252	259	280	352	449	324	195	106	149		219
Total Direct Employment		2,047	2,034	2,201	3,404	3,471	3,608	4,114	4,763	3,938	3,024	2,266	2,558		3,121
Indirect Employment		236	234	290	686	703	762	1,010	1,252	914	543	306	404		612
Total		2,283	2,268	2,491	4,090	4,174	4,369	5,124	6,034	4,852	3,567	2,573	2,962		3,732

Tourist Days													TOTAL
000's													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	12.5	14.7	22.7	23.8	28.5	34.3	38.0	38.4	28.8	25.9	21.7	14.6	300
Non-Serviced Accommodation	20.7	24.8	34.3	106.9	109.2	122.1	176.1	218.5	158.5	78.6	24.3	28.3	1,112
SFR	22.9	7.7	8.8	20.9	13.4	10.4	16.8	17.8	9.2	9.2	7.1	20.6	165
Day Visitors	42.8	48.1	39.8	132.9	144.8	114.3	128.9	201.9	150.4	111.0	88.8	153.9	1,358
Total Tourist Days 000's	98.9	95.3	105.8	234.3	295.1	291.0	357.8	414.5	346.6	234.7	141.9	217.4	2,934

Tourist Numbers													TOTAL
000's													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	6.9	9.7	13.2	14.4	15.8	20.8	18.2	18.9	14.2	12.9	14.4	8.2	189
Non-Serviced Accommodation	6.1	6.0	7.0	16.4	15.6	18.6	24.4	28.5	22.7	11.0	5.2	5.0	166
SFR	5.2	2.7	4.1	7.7	5.1	4.9	6.7	6.8	4.2	4.3	3.5	7.9	69
Day Visitors	42.8	48.1	39.8	132.9	144.8	114.3	128.9	201.9	150.4	111.0	88.8	153.9	1,358
Total Tourist Numbers 000's	64.9	67.4	64.1	171.4	182.3	158.6	178.3	256.1	191.5	140.2	112.0	175.1	1,782

Vehicle Days													TOTAL
000's													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	3.3	5.2	8.3	6.2	8.2	9.7	9.5	9.6	7.5	6.8	5.7	3.9	84
Non-Serviced Accommodation	5.3	7.9	9.1	25.7	27.8	34.8	42.9	53.9	40.9	19.3	8.2	5.6	279
SFR	6.8	3.3	2.6	6.2	4.0	3.1	5.2	5.3	2.7	2.7	2.1	6.1	40
Day Visitors	5.3	10.9	9.0	26.3	28.6	25.8	25.5	39.9	29.7	25.1	20.1	30.4	279
Total Vehicle Days 000's	23.8	28.2	28.9	64.4	68.9	72.3	82.8	108.6	80.9	53.9	34.1	46.0	691

Vehicle Numbers													TOTAL
000's													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	1.9	3.4	4.8	3.8	4.5	5.8	4.5	5.0	3.8	3.7	3.8	2.3	48
Non-Serviced Accommodation	1.6	1.9	1.8	3.9	4.0	4.9	6.0	7.0	5.9	2.7	1.3	1.0	42
SFR	2.7	1.1	1.2	2.3	1.8	1.5	2.0	2.0	1.3	1.3	1.0	2.4	21
Day Visitors	8.5	10.9	9.0	26.3	28.6	25.8	25.5	39.9	29.7	25.1	20.1	30.4	279
Total Vehicle Numbers 000's	14.5	17.3	16.9	36.3	38.9	38.0	38.3	53.9	40.6	32.7	28.2	35.9	390

Average Available Sleeping Spaces													MAX
BED STOCK (number of beds)													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2,685	2,773	2,815	2,829	2,834	2,834	2,837	2,837	2,837	2,834	2,798	2,759	2,837
Non-Serviced Accommodation	4,640	4,684	5,299	10,456	10,612	10,690	10,690	10,690	10,690	10,612	5,066	4,878	10,690
Total BED STOCK (number of beds)	7,325	7,467	8,054	13,285	13,446	13,524	13,527	13,527	13,527	13,446	7,864	7,435	13,527

Economic Impact													£000's												
Expenditure																									
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL												
Direct Expenditure	5,865	4,010	13,834	27,084	33,240	30,533	48,602	46,827	44,436	18,944	7,791	6,297	287,482												
Indirect Expenditure	1,966	1,365	4,630	9,109	11,105	10,203	16,249	15,689	14,843	6,347	2,586	2,131	96,223												
Total	7,831	5,375	18,464	36,192	44,345	40,736	64,851	62,515	59,279	25,290	10,377	8,429	383,684												

Economic Impact													£000's												
Expenditure and Revenue																									
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL												
Direct Revenue	4,887	3,341	11,528	22,570	27,700	25,444	40,502	39,022	37,030	15,786	6,492	5,248	239,552												
Indirect Expenditure	1,966	1,365	4,630	9,109	11,105	10,203	16,249	15,689	14,843	6,347	2,586	2,131	96,223												
VAT	977	688	2,306	4,514	5,540	5,089	8,100	7,804	7,406	3,157	1,298	1,050	47,910												
Total	7,831	5,375	18,464	36,192	44,345	40,736	64,851	62,515	59,279	25,290	10,377	8,429	383,684												
Economic Impact													£000's												
Generated by Category of Visitor																									
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL												
Serviced Accommodation	1,058	1,194	1,872	1,979	2,400	2,885	3,623	3,665	2,877	2,161	1,792	1,203	25,709												
Non-Serviced Accommodation	4,158	2,330	11,652	29,472	38,443	35,325	55,516	52,694	52,599	20,827	7,006	4,788	312,909												
SFR	1,711	575	854	1,560	1,004	773	1,254	1,328	684	532	332	1,542	12,300												
Day Visitors	904	1,276	4,286	3,162	2,499	3,753	4,458	4,628	3,119	1,620	1,046	895	31,866												
Total	7,831	5,375	18,464	36,192	44,345	40,736	64,851	62,515	59,279	25,290	10,377	8,429	383,684												
Economic Impact													£000's												
Sectors in which expenditure is made																									
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL												
Direct Expenditure	493	488	1,251	2,924	3,887	3,352	7,144	6,353	7,428	1,894	782	604	36,605												
Accommodation	1,498	998	3,539	6,664	8,069	7,821	11,306	11,060	10,020	4,729	1,970	1,587	68,890												
Food & Drink	511	337	1,205	2,300	2,794	2,595	3,912	3,830	3,473	1,634	675	542	23,808												
Recreation	1,195	781	3,735	5,210	6,278	5,825	8,895	9,829	7,788	3,656	1,500	1,254	53,643												
Shopping	1,190	758	2,786	5,472	6,672	6,192	9,335	9,130	8,311	3,874	1,565	1,261	58,518												
Transport	4,887	3,341	11,528	22,570	27,700	25,444	40,502	39,022	37,030	15,786	6,492	5,248	239,552												
Total Direct Expenditure	1,966	1,365	4,630	9,109	11,105	10,203	16,249	15,689	14,843	6,347	2,586	2,131	96,223												
VAT	977	688	2,306	4,514	5,540	5,089	8,100	7,804	7,406	3,157	1,298	1,050	47,910												
Indirect Expenditure	1,966	1,365	4,630	9,109	11,105	10,203	16,249	15,689	14,843	6,347	2,586	2,131	96,223												
Total	7,831	5,375	18,464	36,192	44,345	40,736	64,851	62,515	59,279	25,290	10,377	8,429	383,684												

Population													Avg
Total Population	61,475	61,475	61,475	61,475	61,475	61,475	61,475	61,475	61,475	61,475	61,475	61,475	61,475
Employment													FTE's
Supported by tourism activity in these Categories													FTE's
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FTE's
Serviced Accommodation	648	656	732	760	801	841	853	858	801	773	725	665	759
Non-Serviced Accommodation	821	575	1,734	3,909	4,904	4,376	6,656	6,356	6,339	3,007	1,200	900	3,398
SFR	227	76	87	207	133	103	167	176	91	91	71	205	136
Day Visitors	119	167	562	472	328	492	585	833	409	212	137	117	346
Total Direct Employment	1,815	1,475	2,115	5,293	8,169	5,812	8,283	8,281	7,640	4,083	2,134	1,888	4,642
Indirect Employment	314	218	738	1,453	1,771	1,627	2,591	2,502	2,387	1,012	412	340	1,279
Total	2,128	1,693	2,853	6,746	9,940	7,439	10,874	10,783	10,027	5,095	2,546	2,227	5,921
Employment													FTE's
Sectors in which employment is supported													FTE's
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FTE's
Accommodation	892	873	957	1,184	1,189	1,189	1,230	1,191	1,456	1,176	935	912	1,164
Food & Drink	370	246	873	1,645	1,992	1,856	2,791	2,736	2,473	1,167	486	392	1,419
Recreation	153	101	361	689	837	777	1,172	1,147	1,040	489	302	162	594
Shopping	269	171	616	1,172	1,413	1,311	1,961	1,942	1,735	823	338	282	1,006
Transport	131	84	309	603	736	676	1,029	1,007	916	427	173	139	519
Total Direct Employment	1,815	1,475	2,115	5,293	8,169	5,812	8,283	8,281	7,640	4,083	2,134	1,888	4,642
Indirect Employment	314	218	738	1,453	1,771	1,627	2,591	2,502	2,387	1,012	412	340	1,279
Total	2,128	1,693	2,853	6,746	9,940	7,439	10,874	10,783	10,027	5,095	2,546	2,227	5,921

Tourist Days													000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	8.7	9.8	15.3	16.2	19.6	23.6	24.7	25.0	19.5	17.7	14.7	9.8		205
Non-Serviced Accommodation	59.3	31.4	163.8	400.3	521.3	455.0	719.2	691.4	660.7	292.3	102.1	67.1		4,164
SFR	31.4	10.6	12.0	28.7	18.4	14.2	25.1	24.4	12.6	12.6	9.8	28.3		226
Day Visitors	31.1	43.9	147.5	109.5	86.0	129.2	153.5	166.2	107.4	55.8	36.0	30.6		1,097
Total Tourist Days 000's	130.5	95.7	338.7	554.7	645.4	622.0	920.4	907.0	800.3	278.3	162.5	138.1		5,692
Tourist Numbers													000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	4.2	6.3	8.6	9.6	10.6	14.1	11.5	12.5	9.2	9.0	8.4	5.4		110
Non-Serviced Accommodation	9.3	5.7	24.5	55.6	69.4	59.5	93.9	80.0	90.0	36.9	13.3	8.9		553
SFR	12.6	5.0	5.6	10.6	8.4	6.8	9.2	9.4	5.8	5.8	4.8	10.9		95
Day Visitors	31.1	43.9	147.5	109.5	86.0	129.2	153.5	166.2	107.4	55.8	36.0	30.6		1,097
Total Tourist Numbers 000's	57.2	60.9	166.2	185.3	174.4	209.5	268.1	276.1	212.4	107.6	63.5	56.1		1,855
Vehicle Days													000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	2.2	3.3	5.5	4.1	5.6	6.4	6.3	6.4	5.0	4.7	3.9	2.5		66
Non-Serviced Accommodation	13.2	8.4	35.6	88.9	113.7	100.5	156.1	151.3	144.9	63.7	22.4	14.0		911
SFR	9.3	3.1	3.6	8.5	5.5	4.2	6.8	7.2	3.7	3.7	2.9	8.4		87
Day Visitors	6.1	9.9	33.3	21.6	17.0	29.2	30.3	32.8	21.2	12.6	8.1	6.1		228
Total Vehicle Days 000's	31.0	24.8	78.2	121.2	141.8	140.7	199.8	197.8	174.8	84.7	37.3	31.0		1,293
Vehicle Numbers													000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	1.1	3.2	3.1	2.5	3.0	3.6	3.0	3.2	2.4	2.4	2.5	1.4		30
Non-Serviced Accommodation	2.2	1.6	8.4	12.1	15.2	13.2	20.4	18.9	18.8	8.1	3.0	1.8		122
SFR	3.7	1.5	1.7	3.2	2.5	2.0	2.7	2.8	1.7	1.7	1.4	3.2		28
Day Visitors	6.1	9.9	33.3	21.6	17.0	29.2	30.3	32.8	21.2	12.6	8.1	6.1		228
Total Vehicle Numbers 000's	13.1	15.2	43.4	39.3	37.7	48.2	56.4	57.7	45.1	24.8	15.3	12.8		468
BED STOCK (number of beds)													Average Available Sleeping Spaces	MAX
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	1,856	1,842	1,895	1,939	1,949	1,949	1,949	1,949	1,949	1,931	1,931	1,869		1,949
Non-Serviced Accommodation	7,735	5,219	14,444	27,302	27,302	27,302	27,302	27,302	27,302	27,191	12,355	9,247		27,302
Total BED STOCK (number of beds)	9,591	7,061	16,339	29,241	29,251	29,251	29,251	29,251	29,251	29,122	14,286	11,113		29,251

Economic Impact	Expenditure												£000s	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Expenditure	1,888	1,811	2,816	5,984	7,477	7,316	11,731	11,317	9,863	4,576	2,377	1,894	89,142	
Indirect Expenditure	594	570	866	1,952	2,429	2,348	3,833	3,693	3,215	1,466	729	629	22,324	
Total	2,482	2,381	3,682	7,936	9,905	9,664	15,567	15,010	13,078	6,042	3,106	2,513	91,467	

Economic Impact	Expenditure and Revenue												£000s	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Revenue	1,574	1,509	2,346	4,987	6,231	6,097	9,770	9,431	8,219	3,814	1,981	1,653	57,819	
Indirect Expenditure	594	570	866	1,952	2,429	2,348	3,833	3,693	3,215	1,466	729	629	22,324	
VAT	315	302	469	897	1,246	1,219	1,966	1,886	1,644	763	398	331	11,524	
Total	2,482	2,381	3,682	7,936	9,905	9,664	15,567	15,010	13,078	6,042	3,106	2,513	91,467	

Economic Impact	Generated by Category of Visitor												£000s	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	1,080	1,238	1,898	1,975	2,379	2,872	3,446	3,480	2,736	2,171	1,811	1,217	26,506	
Non-Serviced Accommodation	431	467	1,217	4,810	5,694	5,408	8,653	8,896	8,603	2,887	454	577	47,807	
SFR	744	750	264	678	436	336	545	377	297	291	231	675	5,348	
Day Visitors	228	426	283	673	1,396	1,049	2,913	2,056	1,440	686	609	148	11,906	
Total	2,482	2,381	3,682	7,936	9,905	9,664	15,567	15,010	13,078	6,042	3,106	2,513	91,467	

Economic Impact	Sectors in which expenditure is made												£000s	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Expenditure	382	433	676	1,041	1,258	1,343	2,191	2,181	1,974	912	596	445	13,431	
Accommodation	428	400	617	1,383	1,749	1,888	2,551	2,539	2,178	1,042	523	437	15,646	
Food & Drink	141	130	204	468	560	568	897	859	740	348	169	144	5,260	
Recreation	322	278	428	1,037	1,303	1,233	2,001	1,904	1,634	750	354	322	11,585	
Shopping	301	267	424	1,057	1,329	1,285	2,028	1,948	1,692	761	339	305	11,717	
Transport	301	267	424	1,057	1,329	1,285	2,028	1,948	1,692	761	339	305	11,717	
Total Direct Expenditure	1,574	1,509	2,346	4,987	6,231	6,097	9,778	9,431	8,219	3,814	1,981	1,653	57,819	
VAT	315	302	469	897	1,246	1,219	1,956	1,886	1,644	753	398	331	11,524	
Indirect Expenditure	594	570	866	1,952	2,429	2,348	3,833	3,693	3,215	1,466	729	629	22,324	
Total	2,482	2,381	3,682	7,936	9,905	9,664	15,567	15,010	13,078	6,042	3,106	2,513	91,467	

Population													Avg
Total Population													26,728
	26,728	26,728	26,728	26,728	26,728	26,728	26,728	26,728	26,728	26,728	26,728	26,728	26,728
Supported by tourism activity in these Categories													
Employment	FTE's												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FTE's
Serviced Accommodation	569	587	646	661	693	738	750	750	700	679	636	578	668
Non-Serviced Accommodation	208	211	306	747	868	845	1,185	1,190	1,220	563	212	221	648
SFR	99	33	38	90	58	45	72	77	40	39	31	89	59
Day Visitors	30	56	37	88	183	138	382	270	189	90	60	19	130
Total Direct Employment	906	885	1,029	1,566	1,803	1,763	2,390	2,286	2,148	1,371	959	907	1,503
Indirect Employment	95	91	136	311	387	374	611	589	513	234	116	100	297
Total	1,001	976	1,167	1,897	2,190	2,137	3,002	2,875	2,661	1,605	1,075	1,007	1,800
Sectors in which employment is supported													
Employment	FTE's												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FTE's
Accommodation	653	658	673	754	754	759	791	759	835	757	662	650	725
Food & Drink	106	99	152	341	432	417	657	627	538	257	129	108	322
Recreation	42	39	61	140	177	170	269	257	222	104	51	43	131
Shopping	72	63	96	230	293	278	450	428	368	169	80	72	217
Transport	33	28	47	117	147	139	224	215	187	84	37	34	108
Total Direct Employment	906	885	1,029	1,566	1,803	1,763	2,390	2,286	2,148	1,371	959	907	1,503
Indirect Employment	95	91	136	311	387	374	611	589	513	234	116	100	297
Total	1,001	976	1,167	1,897	2,190	2,137	3,002	2,875	2,661	1,605	1,075	1,007	1,800



<u>Economic Impact</u>													
<u>Expenditure and Revenue \$000's</u>													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Direct Expenditure	10,678	10,151	20,434	34,751	83,049	97,387	76,590	84,243	75,329	26,180	18,726	18,180	1,125,734
Indirect Expenditure	3,505	3,543	6,863	18,481	21,187	19,467	25,573	28,400	25,208	12,396	5,595	6,617	275,193
Total	14,183	13,693	27,297	73,232	104,236	116,854	101,833	112,783	100,632	48,597	22,317	21,802	1,400,927
<u>Economic Impact</u>													
<u>Expenditure and Revenue \$000's</u>													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Direct Revenue	6,838	6,459	17,028	45,826	82,241	48,322	63,650	70,319	87,808	30,130	13,938	13,488	435,126
Indirect Expenditure	3,505	3,543	6,863	18,481	21,187	19,467	25,573	28,400	25,208	12,396	5,595	6,617	175,725
VAI	1,780	1,092	3,917	9,125	10,508	9,664	12,710	14,668	13,566	6,022	2,787	2,888	87,928
Total	14,183	13,693	27,217	73,232	104,236	77,454	101,833	112,783	100,632	48,597	22,317	21,802	697,879
<u>Economic Impact</u>													
<u>Categories mixing rise to tourism expenditure</u>													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	3,358	3,558	5,191	10,566	22,827	11,580	12,544	11,478	7,211	6,177	3,704	2,202	89,287
Non-Serviced Accommodation	4,964	5,938	15,499	24,901	66,109	50,081	70,577	64,859	70,918	23,448	10,288	8,408	409,846
SFR	2,515	1,181	1,344	3,206	2,082	1,569	2,378	2,729	1,406	1,494	1,094	3,189	25,377
Day Visitors	9,566	8,060	5,263	8,470	8,005	1,577	11,316	12,821	8,730	5,688	4,855	6,004	84,800
Total	14,163	13,693	27,217	73,232	104,236	77,454	101,833	112,783	100,632	48,597	22,317	21,802	697,879
<u>Economic Impact</u>													
<u>Seasons in which expenditure is made</u>													
<u>Peak Expenditures</u>													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Accommodation	1,277	1,462	2,665	7,098	8,405	7,820	12,147	13,286	13,395	6,830	2,447	1,888	76,713
Food & Drink	2,850	2,413	5,038	13,204	15,159	13,954	17,850	18,544	16,938	8,814	4,074	4,046	125,365
Shopping	891	808	1,633	4,525	5,199	4,795	6,987	8,212	6,987	3,215	366	366	42,119
Recreation	2,077	1,806	3,791	10,200	11,833	12,170	13,568	15,594	12,994	6,075	3,018	3,152	84,216
Transport	2,004	1,769	3,853	10,599	12,210	11,244	14,172	15,723	13,680	6,974	3,023	2,068	59,343
Total Direct Expenditure	8,045	7,460	17,028	45,826	55,941	48,322	63,560	70,319	62,828	30,130	13,938	13,488	435,126
VAI	1,780	1,092	3,917	9,125	10,508	9,664	12,710	14,668	13,566	6,022	2,787	2,888	87,928
Indirect Expenditure	3,505	3,543	6,863	18,481	21,187	19,467	25,573	28,400	25,208	12,396	5,595	6,617	175,725
Total	14,183	13,693	27,217	73,232	104,236	77,454	101,833	112,783	100,632	48,597	22,317	21,802	697,879

Population														Avg	
Total Population	131,300	131,300	131,300	131,300	131,300	131,300	131,300	131,300	131,300	131,300	131,300	131,300	131,300	131,300	131,300
Supported by tourism activity in these Categories															
Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		FTE's	
Direct Employment	2,108	2,150	2,227	2,584	2,615	2,802	2,788	2,833	2,759	2,543	2,599	2,101	2,488	2,478	
Service Accommodation	1,728	1,753	3,068	7,773	9,249	6,540	10,097	11,256	10,475	5,566	2,372	2,128	6,163	6,163	
Non-Service Accommodation	485	163	186	443	285	210	356	377	194	194	151	437	291	291	
SFR	323	410	720	1,155	1,091	1,000	1,543	1,748	1,190	604	662	831	859	859	
Day Visitors	4,642	4,476	6,241	11,933	13,240	12,421	14,782	16,213	14,618	9,107	5,584	5,557	9,900	9,900	
Total Direct Employment	581	587	1,141	3,063	3,512	3,227	4,258	4,707	4,163	2,628	921	831	2,427	2,427	
Indirect Employment	581	587	1,141	3,063	3,512	3,227	4,258	4,707	4,163	2,628	921	831	2,427	2,427	
Total	5,223	5,063	7,382	14,997	16,752	15,648	19,001	20,920	18,801	11,135	6,511	6,486	12,327	12,327	
Sectors in which employment is supported															
Employment	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		FTE's	
Direct Employment	2,910	2,978	3,103	3,338	3,630	3,557	3,643	3,790	3,854	3,541	3,081	3,008	3,383	3,383	
Accommodation	2,910	2,978	3,103	3,338	3,630	3,557	3,643	3,790	3,854	3,541	3,081	3,008	3,383	3,383	
Food & Drink	602	619	1,284	3,387	3,974	3,580	4,520	5,014	4,345	2,261	1,045	1,038	2,837	2,837	
Recreation	277	251	527	1,408	1,616	1,492	1,861	2,081	1,812	897	425	422	1,058	1,058	
Shopping	488	422	837	2,388	2,720	2,505	3,175	3,521	3,028	1,598	758	732	1,848	1,848	
Transport	253	265	442	1,215	1,399	1,288	1,624	1,807	1,568	799	347	351	978	978	
Total Direct Employment	4,062	4,478	6,241	11,934	13,240	12,421	14,782	16,213	14,618	9,107	5,584	5,557	9,900	9,900	
Indirect Employment	581	587	1,141	3,063	3,512	3,227	4,258	4,707	4,163	2,628	921	831	2,427	2,427	
Total	5,223	5,063	7,382	14,997	16,752	15,648	19,001	20,920	18,801	11,135	6,511	6,486	12,327	12,327	

Tourists														TOTAL
Tourist Days 000's														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Service Accommodation	29.1	31.1	44.9	65.2	69.5	71.0	84.1	91.1	83.3	62.9	53.3	32.3	71.6	
Non-Service Accommodation	70.3	75.1	216.1	729.3	837.5	819.6	1,094.2	1,109.5	1,011.9	467.2	143.8	118.9	6,657	
SFR	87.1	106.2	261.0	81.2	39.4	39.3	48.2	52.1	38.8	29.8	20.9	62.5	485	
Day Visitors	64.6	107.5	189.1	302.0	286.4	275.3	458.8	458.7	312.3	210.9	173.7	218.0	3,019	
Total Tourist Days 000's	251.0	294.3	479.7	1,156.8	1,292.9	1,187.2	1,342.4	1,711.4	1,434.4	767.8	391.7	427.2	10,877	
Tourists														TOTAL
Tourist Numbers 000's														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Service Accommodation	14.5	15.5	25.1	38.5	37.1	41.5	40.3	45.3	39.5	32.5	34.1	17.7	387	
Non-Service Accommodation	12.2	16.5	54.9	106.3	123.3	110.4	139.4	140.3	140.3	61.4	22.4	17.8	925	
SFR	26.9	10.7	11.9	22.7	17.9	14.4	19.7	20.5	12.4	12.5	10.3	23.3	223	
Day Visitors	64.6	107.5	189.1	302.0	286.4	275.3	458.8	458.7	312.3	210.9	173.7	218.0	3,019	
Total Tourist Numbers 000's	138.3	154.7	291.0	470.5	464.7	437.2	598.2	604.6	594.6	317.3	240.4	218.5	4,529	
Vehicles														TOTAL
Vehicle Days 000's														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Service Accommodation	7.8	10.8	16.3	17.1	20.1	19.8	22.0	23.9	21.9	17.0	14.7	8.5	200	
Non-Service Accommodation	18.0	22.6	49.6	166.3	209.5	191.8	227.6	252.2	258.2	108.3	33.0	23.8	1,534	
SFR	19.9	6.7	7.8	18.2	11.7	9.0	14.6	15.5	8.0	8.0	6.2	18.0	143	
Day Visitors	16.7	24.3	42.7	59.8	56.8	61.0	80.0	90.6	61.7	47.6	29.2	43.1	625	
Total Vehicle Days 000's	60.3	64.4	116.2	261.4	294.9	281.7	344.3	382.1	327.6	181.1	93.1	93.3	2,509	
Vehicles														TOTAL
Vehicle Numbers 000's														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Service Accommodation	3.9	7.0	8.1	10.1	10.7	11.7	10.8	11.9	15.4	8.8	9.2	4.8	108	
Non-Service Accommodation	3.0	8.2	8.2	24.4	28.5	26.1	30.3	32.0	32.9	14.3	5.3	3.8	214	
SFR	6.0	3.2	3.3	8.7	5.3	4.3	3.8	5.9	3.7	3.7	3.1	6.8	80	
Day Visitors	16.7	24.3	42.7	59.8	56.8	61.0	80.0	90.6	61.7	47.6	29.2	43.1	625	
Total Vehicle Numbers 000's	31.6	39.6	65.5	101.0	101.6	103.1	126.8	140.4	108.8	74.4	56.8	58.2	1,005	
BED STOCK (number of beds)														MAX
Bed Stock (number of beds)														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Service Accommodation	6,492	6,581	6,688	6,761	6,775	6,781	6,788	6,794	6,793	6,763	6,657	6,555	6,799	
Non-Service Accommodation	12,448	11,204	21,718	49,808	42,814	42,904	42,908	42,908	42,895	42,700	16,718	16,094	43,308	
TOTAL BED STOCK (number of beds)	20,028	17,785	28,406	56,569	49,589	49,685	49,696	49,692	49,683	49,463	23,375	21,653	49,899	

Economic Impact		Expenditure and Revenue												TOTAL	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Expenditure	3,716	4,436	5,151	15,991	16,292	15,889	19,791	24,538	20,141	11,908	6,088	7,774	151,816		
Indirect Expenditure	1,242	1,591	1,775	5,521	5,591	5,459	6,745	8,412	6,849	4,130	2,089	2,761	52,165		
Total	4,958	6,029	6,926	21,512	21,883	21,449	26,536	32,948	26,990	16,038	8,177	10,535	203,981		

Economic Impact		Expenditure and Revenue												TOTAL	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Revenue	3,097	3,699	2,392	13,357	13,324	16,482	20,446	16,784	9,824	5,074	6,478	126,513			
Indirect Revenue	1,242	1,591	1,775	5,521	5,591	5,459	6,745	8,412	6,849	4,130	2,089	2,761	52,165		
VAT	819	740	858	2,665	2,715	2,665	3,298	4,089	3,357	1,985	1,018	1,296	25,301		
Total	4,958	6,029	6,926	21,512	21,883	21,449	26,536	32,948	26,990	16,038	8,177	10,535	203,981		

Economic Impact		Generated by Category of Visitor												TOTAL	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	1,361	1,483	2,187	3,157	3,370	3,434	4,939	5,353	4,492	2,533	1,535	37,220			
Non-Serviced Accommodation	1,111	2,795	3,193	12,710	13,565	14,491	16,811	20,652	17,765	9,215	2,558	3,078			
SFR	1,184	396	453	1,080	995	835	868	919	473	473	369	1,016			
Day Visitors	1,303	1,424	1,094	4,565	4,254	2,989	3,917	6,023	3,057	3,377	2,883	4,855			
Total	4,958	6,029	6,926	21,512	21,883	21,449	26,536	32,948	26,990	16,038	8,177	10,535	203,981		

Economic Impact		Sectors in which expenditure is made												TOTAL	
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Expenditure	524	764	1,011	2,234	2,366	2,439	3,748	4,338	3,655	1,792	1,032	823	24,931		
Food & Drink	908	1,041	1,173	3,854	3,900	3,779	4,289	5,591	4,492	2,850	1,458	1,884	35,459		
Accommodation	351	348	352	1,304	1,261	1,286	1,504	1,897	1,572	961	481	657	11,892		
Shopping	703	733	778	2,950	2,965	2,882	3,081	4,264	3,599	2,145	1,066	1,541	26,765		
Transport	850	769	899	2,994	3,029	2,958	3,451	4,380	3,511	2,176	1,036	1,462	27,253		
Total Direct Expenditure	3,097	3,699	4,292	13,328	13,517	13,324	16,482	20,446	16,784	9,824	5,074	6,478			
VAT	819	740	858	2,665	2,715	2,665	3,298	4,089	3,357	1,985	1,018	1,296			
Indirect Expenditure	1,242	1,591	1,775	5,521	5,591	5,459	6,745	8,412	6,849	4,130	2,089	2,761			
Total	4,958	6,029	6,926	21,512	21,883	21,449	26,536	32,948	26,990	16,038	8,177	10,535	203,981		

Population													Avg
Total Population	44,224	44,224	44,224	44,224	44,224	44,224	44,224	44,224	44,224	44,224	44,224	44,224	44,224
Employment													
Supported by tourism activity in these Categories													FTE's
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FTE's	
898	928	1,001	1,092	1,113	1,118	1,174	1,203	1,171	1,088	1,028	932	1,062	
753	915	981	2,153	2,276	2,387	2,568	3,114	2,699	1,778	911	947	1,291	
163	35	43	149	86	74	130	137	65	45	51	147	98	
718	194	149	922	580	408	334	821	528	459	360	685	847	
Total Direct Employment													1,992
Indirect Employment													2,064
Total													2,196
Sectors in which employment is supported													
FTE's													FTE's
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	FTE's	
1,425	1,447	1,472	1,599	1,613	1,608	1,611	1,744	1,636	1,608	1,464	1,447	1,554	
233	267	301	989	1,000	970	1,138	1,434	1,152	731	374	509	758	
94	108	122	406	411	400	488	590	478	299	150	205	311	
165	182	201	650	693	669	786	997	795	502	249	360	524	
76	84	98	342	347	333	368	500	427	240	119	188	286	
1,992	2,092	2,194	4,026	4,085	3,986	4,397	5,285	4,461	3,389	2,535	2,588	3,209	
Indirect Employment													2,064
Total													2,196

Tourist Days													000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	13.0	13.1	18.9	27.3	29.1	29.7	35.1	38.1	34.8	28.4	22.4	13.6		501
Non-Serviced Accommodation	13.1	22.5	28.7	159.2	171.1	182.4	204.3	250.4	215.5	114.7	31.0	36.4		1,449
SFR	22.6	7.6	8.6	20.6	13.3	10.2	16.6	17.6	9.0	9.0	7.0	20.4		163
Day Visitors	46.6	50.9	39.1	163.3	152.2	106.9	140.1	215.5	138.0	120.8	96.0	173.7		1,443
Total Tourist Days 000's	94.3	104.1	105.4	370.4	365.7	329.2	396.2	521.5	397.4	270.9	156.4	244.0		3,356

Tourist Numbers													000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	6.6	8.6	11.0	16.7	16.2	18.0	17.7	19.7	17.3	14.2	14.9	7.7		169
Non-Serviced Accommodation	3.9	7.9	7.9	24.5	24.5	25.8	28.4	32.7	31.0	16.2	6.7	6.5		216
SFR	9.0	3.6	4.0	7.6	6.0	4.9	6.6	6.8	4.2	4.2	3.5	7.8		66
Day Visitors	46.6	50.9	39.1	163.3	152.2	106.9	140.1	215.5	138.0	120.8	96.0	173.7		1,443
Total Tourist Numbers 000's	66.1	71.1	62.0	212.1	198.9	155.6	192.9	274.7	192.4	136.4	121.1	195.0		1,896

Vehicle Days													000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	3.1	4.6	6.9	7.2	8.4	8.4	9.3	10.1	9.2	7.0	5.8	3.6		84
Non-Serviced Accommodation	3.4	10.4	10.2	39.7	44.7	48.5	50.9	61.8	56.9	29.1	7.9	7.2		371
SFR	6.7	2.3	2.6	6.1	3.9	3.0	4.9	5.2	2.7	2.7	2.1	6.0		48
Day Visitors	9.2	11.5	8.8	52.3	30.1	24.1	27.7	42.6	27.2	27.3	21.7	34.3		297
Total Vehicle Days 000's	22.4	28.8	28.5	95.3	87.0	84.0	92.8	119.7	94.1	66.0	37.8	51.1		799

Vehicle Numbers													000's	TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	1.7	3.0	4.0	4.4	4.6	5.0	4.7	5.2	4.6	3.8	4.0	2.0		47
Non-Serviced Accommodation	1.0	2.6	2.1	6.1	6.4	6.9	7.1	8.1	8.2	4.1	1.7	1.3		56
SFR	2.7	1.1	1.2	2.3	1.8	1.4	2.0	2.0	1.2	1.3	1.0	2.3		20
Day Visitors	9.2	11.5	8.8	32.3	30.1	24.1	27.7	42.6	27.2	27.3	21.7	34.3		297
Total Vehicle Numbers 000's	14.6	18.2	16.1	48.1	42.9	37.5	37.3	41.3	38.4	28.4	39.9	43.0		420

BED STOCK (number of beds)													Average Available Sleeping Spaces	MAX
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	2,685	2,773	2,815	2,829	2,834	2,834	2,837	2,837	2,837	2,834	2,798	2,762		2,837
Non-Serviced Accommodation	4,840	4,884	5,239	10,458	10,812	10,690	10,690	10,690	10,690	10,612	5,066	4,676		10,690
Total BED STOCK (number of beds)	7,525	7,657	8,054	13,287	13,446	13,524	13,527	13,527	13,527	13,446	7,864	7,438		13,527

Economic Impact													£000's	TOTAL
Expenditure and Revenue														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Expenditure	5,260	4,003	12,790	31,203	37,798	33,916	45,124	47,916	44,368	19,063	7,848	6,349		295,685
Indirect Expenditure	1,737	1,397	4,322	10,486	12,657	11,372	15,111	16,078	14,848	6,427	2,628	2,183		99,245
Total	6,998	5,400	17,118	41,690	50,454	45,288	60,235	63,994	59,236	25,510	10,476	8,532		394,931

Economic Impact													£000's	TOTAL
Expenditure and Revenue														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Revenue	4,384	3,336	10,664	25,003	31,496	29,253	37,503	39,930	36,990	15,903	6,540	5,291		248,404
Indirect Revenue	1,737	1,397	4,322	10,486	12,657	11,372	15,111	16,078	14,848	6,427	2,628	2,183		99,245
VAT	877	667	2,133	5,201	6,300	5,653	7,521	7,966	7,398	3,181	1,308	1,058		49,281
Total	6,998	5,400	17,118	41,690	50,454	45,288	60,235	63,994	59,236	25,510	10,476	8,532		394,931

Economic Impact													£000's	TOTAL
Generated by Category of Visitor														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Serviced Accommodation	978	1,024	1,496	2,201	2,358	2,402	3,403	3,689	3,373	2,113	1,782	1,078		25,890
Non-Serviced Accommodation	3,591	2,812	11,051	35,042	44,942	38,842	51,070	54,446	51,872	21,172	7,091	5,043		228,612
SFR	1,625	548	821	1,482	953	734	1,192	1,261	650	649	506	1,405		11,684
Day Visitors	803	1,218	3,910	2,965	2,201	3,509	4,570	4,598	3,342	1,575	1,097	947		30,737
Total	6,998	5,400	17,118	41,690	50,454	45,288	60,235	63,994	59,236	25,510	10,476	8,532		394,931

Economic Impact													£000's	TOTAL
Sectors in which expenditure is made														
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		
Direct Expenditure	422	475	1,100	3,614	4,618	3,840	6,333	6,685	7,345	1,889	803	603		37,729
Accommodation	1,550	996	3,285	7,588	9,094	8,287	10,603	11,272	10,049	4,766	1,979	1,599		70,870
Food & Drink	461	337	1,120	2,623	3,154	2,866	3,898	3,898	3,480	1,648	678	547		24,476
Recreation	1,079	764	2,548	5,924	7,061	6,441	8,258	8,776	7,804	3,697	1,507	1,203		55,135
Shopping	1,071	764	2,609	6,254	7,552	6,829	8,743	9,209	8,313	3,911	1,573	1,276		58,193
Transport	4,384	3,336	10,664	25,003	31,496	29,253	37,503	39,930	36,990	15,903	6,540	5,291		248,404
Total Direct Expenditure	8,777	6,671	21,333	52,011	63,300	56,553	75,211	79,966	73,998	31,811	13,088	10,558		49,281
VAT	1,737	1,397	4,322	10,486	12,657	11,372	15,111	16,078	14,848	6,427	2,628	2,183		99,245
Indirect Expenditure														
Total	6,998	5,400	17,118	41,690	50,454	45,288	60,235	63,994	59,236	25,510	10,476	8,532		394,931

Population													Avg
Total Population	60,689	60,689	60,689	60,689	60,689	60,689	60,689	60,689	60,689	60,689	60,689	60,689	60,689
Employment													FTE's
Supported by tourism activity in these categories													FTE's
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		FTE's
Serviced Accommodation	644	646	706	786	805	829	847	868	845	776	730	658	760
Non-Serviced Accommodation	779	613	1,719	4,659	5,846	5,108	6,351	6,810	6,448	3,143	1,237	242	3,638
SFR	224	75	86	205	132	101	165	174	90	90	70	202	134
Day Visitors	110	166	633	404	300	476	623	627	456	215	150	129	349
Total Direct Employment	1,757	1,500	3,043	6,049	7,063	6,497	7,986	8,479	7,836	4,223	2,187	1,535	4,881
Indirect Employment	286	232	716	1,738	2,098	1,885	2,509	2,665	2,461	1,065	435	362	1,371
Total	2,045	1,731	3,760	7,787	9,161	8,381	10,495	11,143	10,299	5,288	2,622	2,297	6,252
Employment													FTE's
Sectors in which employment is supported													FTE's
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		FTE's
Accommodation	692	673	957	1,164	1,247	1,189	1,191	1,255	1,399	1,176	935	912	1,101
Food & Drink	346	255	843	1,946	2,333	2,126	2,720	2,892	2,576	1,223	508	410	1,515
Recreation	143	105	343	617	662	662	1,141	1,214	1,083	513	211	170	638
Shopping	252	179	596	1,585	1,656	1,506	1,931	2,052	1,825	852	352	296	1,075
Transport	123	88	299	717	666	783	1,002	1,066	853	440	180	144	565
Total Direct Employment	1,757	1,500	3,043	6,049	7,063	6,497	7,986	8,479	7,836	4,223	2,187	1,535	4,881
Indirect Employment	286	232	716	1,738	2,098	1,885	2,509	2,665	2,461	1,065	435	362	1,371
Total	2,045	1,731	3,760	7,787	9,161	8,381	10,495	11,143	10,299	5,288	2,622	2,297	6,252

Tourist Days													000's
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Serviced Accommodation	6.3	8.7	12.7	18.7	23.0	20.4	24.1	26.2	23.9	18.0	15.2	9.2	295
Non-Serviced Accommodation	54.2	36.0	162.1	487.8	625.3	541.1	691.7	737.3	677.4	306.2	106.5	72.6	4,499
SFR	31.0	10.4	11.9	28.3	16.2	14.0	22.8	24.1	12.4	12.4	9.7	28.0	225
Day Visitors	26.7	43.6	139.9	106.1	78.7	125.5	163.5	164.5	119.6	56.4	39.2	33.9	1,100
Total Tourist Days 000's	122.3	98.7	326.6	640.9	742.3	701.1	902.1	953.0	893.2	393.6	170.8	143.6	6,227
Tourist Numbers													000's
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Serviced Accommodation	4.0	5.6	7.1	11.1	10.8	12.2	11.2	13.1	11.3	9.2	9.7	5.1	110
Non-Serviced Accommodation	7.8	6.9	24.1	69.2	84.4	71.7	90.0	92.0	92.4	39.0	14.3	9.9	602
SFR	12.4	5.0	5.5	10.5	6.3	6.7	9.1	8.3	5.7	5.8	4.8	10.8	94
Day Visitors	28.7	43.6	139.9	106.1	78.7	125.5	163.5	164.5	119.6	56.4	39.2	33.9	1,100
Total Tourist Numbers 000's	53.0	61.0	176.6	196.9	182.3	216.2	273.9	278.0	228.9	110.0	68.0	59.6	1,906
Vehicle Days													000's
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Serviced Accommodation	2.2	3.0	4.5	4.8	5.8	5.6	6.2	6.7	6.1	4.7	4.0	2.4	56
Non-Serviced Accommodation	11.9	10.0	35.6	107.3	136.1	121.0	151.5	161.6	150.8	68.1	23.5	15.1	995
SFR	9.2	3.1	3.5	8.4	5.4	4.2	6.8	7.1	3.7	3.7	2.9	8.3	66
Day Visitors	5.7	9.8	31.6	20.9	15.6	26.3	32.3	32.5	23.6	12.7	6.9	6.7	229
Total Vehicle Days 000's	28.9	25.9	75.3	141.5	164.8	159.1	196.7	208.1	184.2	89.2	39.2	32.4	1,345
Vehicle Numbers													000's
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		TOTAL
Serviced Accommodation	1.0	1.9	2.5	2.8	3.1	3.0	2.9	3.4	2.9	2.4	2.5	1.3	30
Non-Serviced Accommodation	1.8	2.0	5.4	15.3	18.7	16.1	19.8	20.2	20.6	8.7	3.2	2.0	134
SFR	3.7	1.5	1.6	3.1	2.5	2.0	2.7	2.7	1.7	1.7	1.4	3.2	28
Day Visitors	5.7	9.8	31.6	20.9	15.6	26.3	32.3	32.5	23.6	12.7	6.9	6.7	229
Total Vehicle Numbers 000's	12.2	15.3	41.1	42.2	39.5	49.7	61.7	58.8	48.8	25.5	16.0	13.2	420
BED STOCK (number of beds)													Average Available Sleeping Spaces
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec		MAX
Serviced Accommodation	1,856	1,842	1,895	1,939	1,949	1,949	1,949	1,949	1,931	1,891	1,866		1,949
Non-Serviced Accommodation	1,735	5,219	14,444	27,302	27,302	27,302	27,306	27,306	27,306	27,191	12,355	9,247	27,306
Total BED STOCK (number of beds)	9,591	7,061	16,339	29,241	29,251	29,251	29,255	29,255	29,122	14,246	11,113		29,255

Economic Impact		Expenditure and Revenue												£000's		TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Direct Expenditure		1,701	1,709	2,487	7,557	8,959	8,082	11,345	11,931	10,864	5,159	2,785	2,093	74,852		
Indirect Expenditure		625	655	785	2,475	2,939	2,636	3,717	3,909	3,541	1,680	879	673	24,315		
Total		2,326	2,364	3,272	10,031	11,899	10,718	15,062	15,841	14,405	6,849	3,664	2,736	98,967		

Economic Impact		Expenditure and Revenue												£000's		TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Direct Revenue		1,418	1,424	2,073	8,297	7,466	8,735	9,455	9,843	9,053	4,307	2,321	1,719	62,210		
Indirect Revenue		525	555	785	2,475	2,939	2,636	3,717	3,909	3,541	1,680	879	673	24,315		
VAT		284	285	415	1,259	1,493	1,347	1,891	1,989	1,811	861	464	344	12,442		
Total		2,226	2,264	3,272	10,031	11,899	10,718	15,062	15,841	14,405	6,849	3,664	2,736	98,967		

Economic Impact		Generated by Category of Visitor												£000's		TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Serviced Accommodation		999	1,061	1,517	2,197	2,336	2,392	3,236	3,502	3,210	2,124	1,601	1,091	25,489		
Non-Serviced Accommodation		262	601	1,206	6,249	7,596	6,948	8,477	9,590	9,381	3,501	587	716	55,096		
SPR		706	237	270	644	414	319	518	548	282	282	220	637	5,090		
Day Visitors		259	364	281	941	1,550	1,059	2,830	2,200	1,531	942	1,075	592	13,334		
Total		2,226	2,264	3,272	10,031	11,899	10,718	15,062	15,841	14,405	6,849	3,664	2,736	98,967		

Economic Impact		Sectors in which expenditure is made												£000's		TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Direct Expenditure		331	403	574	1,251	1,421	1,344	2,067	2,275	2,195	949	611	431	13,853		
Accommodation		391	376	548	1,762	2,110	1,887	2,588	2,682	2,397	1,197	637	462	17,036		
Food & Drink		129	123	181	598	716	640	873	908	814	401	207	153	5,743		
Recreation		295	265	385	1,326	1,587	1,406	1,949	2,014	1,791	873	444	345	12,880		
Shopping		272	257	384	1,361	1,633	1,457	1,979	2,064	1,856	867	423	328	12,899		
Transport		24	25	41	156	187	167	227	221	213	109	48	38	1,223		
Total Direct Expenditure		1,418	1,424	2,073	8,297	7,466	8,735	9,455	9,843	9,053	4,307	2,321	1,719	62,210		
VAT		284	285	415	1,259	1,493	1,347	1,891	1,989	1,811	861	464	344	12,442		
Indirect Expenditure		525	555	785	2,475	2,939	2,636	3,717	3,909	3,541	1,680	879	673	24,315		
Total		2,226	2,264	3,272	10,031	11,899	10,718	15,062	15,841	14,405	6,849	3,664	2,736	98,967		

Population		Supported by tourism activity in these Categories												FTE's		TOTAL
Total Population		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
26,387		26,387	26,387	26,387	26,387	26,387	26,387	26,387	26,387	26,387	26,387	26,387	26,387	26,387		

Employment		Supported by tourism activity in these Categories												FTE's		TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Serviced Accommodation		568	577	620	688	697	705	745	761	743	682	641	571	668		
Non-Serviced Accommodation		194	225	308	959	1,127	1,045	1,179	1,332	1,328	645	224	236	733		
SPR		58	33	37	89	57	44	72	76	39	39	30	88	58		
Day Visitors		35	50	38	128	211	144	386	300	209	128	147	40	151		
Total Direct Employment		853	884	1,004	1,859	2,093	1,938	2,580	2,469	2,319	1,495	1,042	934	1,609		
Indirect Employment		87	92	130	410	487	437	616	648	587	278	146	112	338		
Total		940	976	1,134	2,269	2,580	2,375	3,196	3,117	2,905	1,773	1,188	1,046	1,947		

Employment		Sectors in which employment is supported												FTE's		TOTAL
		Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec			
Accommodation		653	658	673	754	771	759	762	791	819	757	662	650	728		
Food & Drink		100	96	141	452	541	484	684	688	615	307	163	119	364		
Recreation		40	38	57	166	223	199	272	283	253	125	64	48	148		
Shopping		69	62	90	310	371	329	456	471	419	204	104	81	247		
Transport		31	29	44	155	187	167	227	221	213	109	48	38	1,223		
Total Direct Employment		853	884	1,004	1,859	2,093	1,938	2,580	2,469	2,319	1,495	1,042	934	1,609		
Indirect Employment		87	92	130	410	487	437	616	648	587	278	146	112	338		
Total		940	976	1,134	2,269	2,580	2,375	3,196	3,117	2,905	1,773	1,188	1,046	1,947		



## 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>	
- 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
<b>Direct revenue</b>	denotes visitor expenditure within a zone or Borough area

F's 2011

RADNORSHIRE 2011

Appendix 2.12

Tourist Days													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	8.7	9.3	13.3	19.2	20.5	20.9	24.3	26.8	24.8	18.8	15.8	9.6	213
Non-Serviced Accommodation	2.9	6.6	15.3	82.4	101.1	92.1	108.2	121.8	119.0	45.6	6.3	7.9	726
SFR	13.5	4.5	5.2	12.3	7.9	6.1	9.9	10.5	5.4	5.4	4.2	12.2	97
Day Visitors	9.3	13.0	10.0	33.0	55.5	37.9	101.2	78.7	54.8	33.7	38.5	10.5	471
Total Tourist Days 000's	34.4	33.5	43.8	147.5	184.9	157.0	244.1	237.8	203.8	103.3	64.7	40.1	1,495
Tourist Numbers													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	4.3	5.8	7.0	10.7	10.1	11.8	11.3	12.5	11.0	9.1	8.4	5.0	108
Non-Serviced Accommodation	0.9	1.7	2.9	12.6	14.4	12.9	14.9	15.6	17.0	6.3	1.4	1.4	102
SFR	5.4	2.8	2.4	4.6	3.6	2.9	4.0	4.0	2.5	2.5	2.1	4.7	41
Day Visitors	9.3	13.0	10.0	33.0	55.5	37.9	101.2	78.7	54.8	33.7	38.5	10.5	471
Total Tourist Numbers 000's	19.8	22.6	22.3	61.5	83.5	66.5	131.4	111.0	85.3	51.8	51.4	21.5	727
Vehicle Days													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	2.3	3.3	4.9	5.1	6.0	5.9	6.6	7.1	6.5	5.6	4.7	2.5	81
Non-Serviced Accommodation	0.7	2.2	3.7	19.3	23.8	22.3	25.2	28.6	28.4	11.0	1.6	1.6	168
SFR	4.0	1.3	1.5	3.7	2.3	1.8	2.9	3.1	1.8	1.6	1.2	3.6	29
Day Visitors	1.8	2.9	2.3	6.6	11.0	6.5	20.2	15.5	10.8	7.2	8.7	2.1	98
Total Vehicle Days 000's	8.9	9.7	12.4	34.7	43.0	36.6	54.7	54.3	47.5	26.8	16.3	9.8	356
Vehicle Numbers													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	TOTAL
Serviced Accommodation	1.2	2.0	2.6	2.6	2.9	3.3	3.0	3.3	2.9	2.6	2.7	1.3	31
Non-Serviced Accommodation	0.2	0.5	0.7	2.9	3.4	3.1	3.5	3.7	4.1	1.5	0.4	0.3	24
SFR	1.6	0.8	0.7	1.4	1.1	0.9	1.2	1.2	0.7	0.7	0.6	1.4	12
Day Visitors	1.8	2.9	2.3	6.6	11.0	6.5	20.2	15.5	10.8	7.2	8.7	2.1	98
Total Vehicle Numbers 000's	4.8	6.1	6.3	13.6	18.3	15.9	27.7	23.7	18.5	12.5	12.4	5.0	165
BED STOCK (number of beds)													
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	MAX
Serviced Accommodation	1,951	1,956	1,978	1,993	1,990	1,998	2,002	1,998	2,003	1,998	1,968	1,944	2,003
Non-Serviced Accommodation	1,171	1,231	2,035	4,900	4,900	4,912	4,912	4,912	4,900	1,295	1,171	4,912	4,912
Total BED STOCK (number of beds)	3,122	3,257	4,013	6,893	6,890	6,910	6,914	6,910	6,903	6,898	3,263	5,115	6,914

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RADNORSHIRE 2011

<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]

- 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.)
- 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'.
- 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).

<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:

- o Food and Drink
- o Recreation
- o Shopping
- o 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.

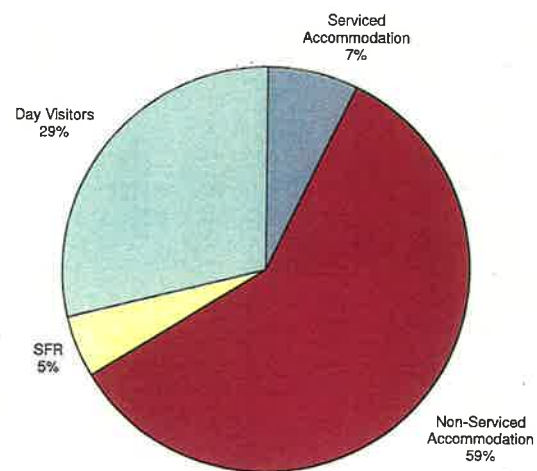
<sup>2</sup> Caused by unusual or eccentric events

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

POWYS COUNTY COUNCIL 2012

CHART 1

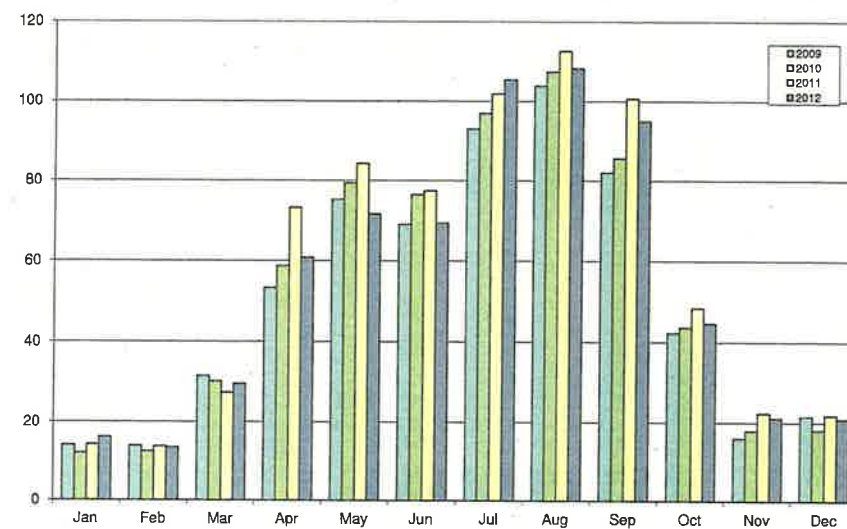
9.9 MILLION TOURIST DAYS : 2012 : BY TYPE OF TOURIST



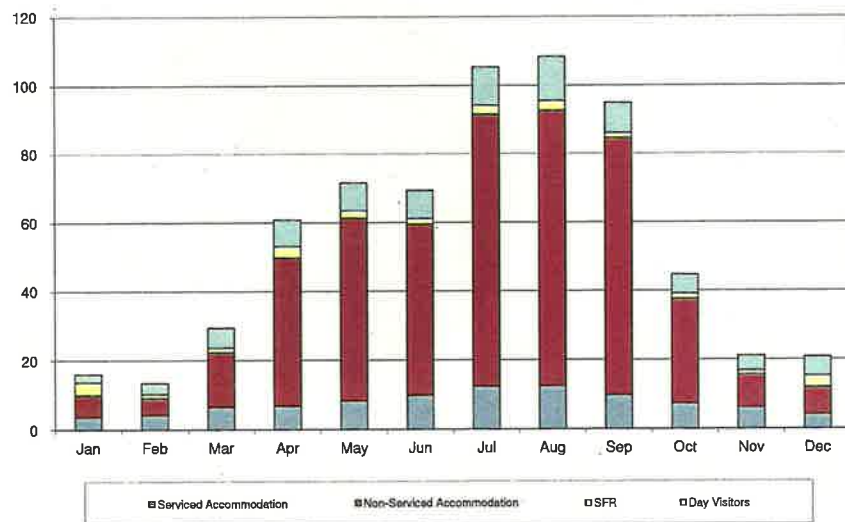
POWYS COUNTY COUNCIL 2012

CHART 2

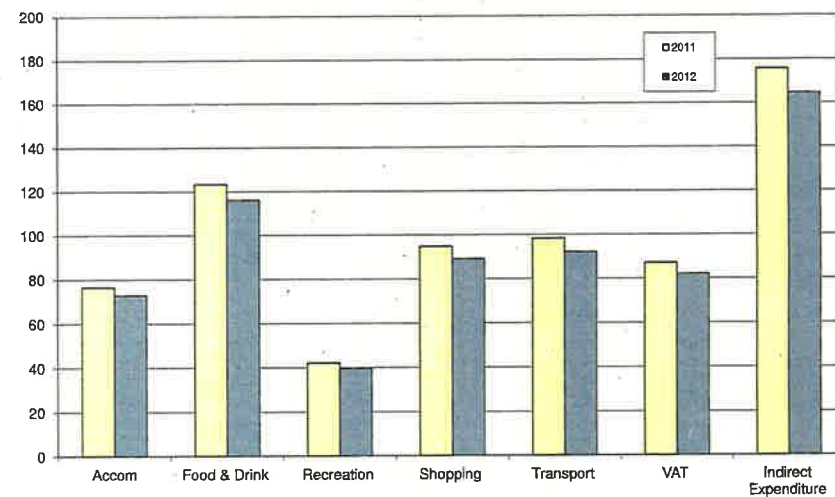
TOURISM EXPENDITURE : 2009-2012 BY MONTH (£M's)



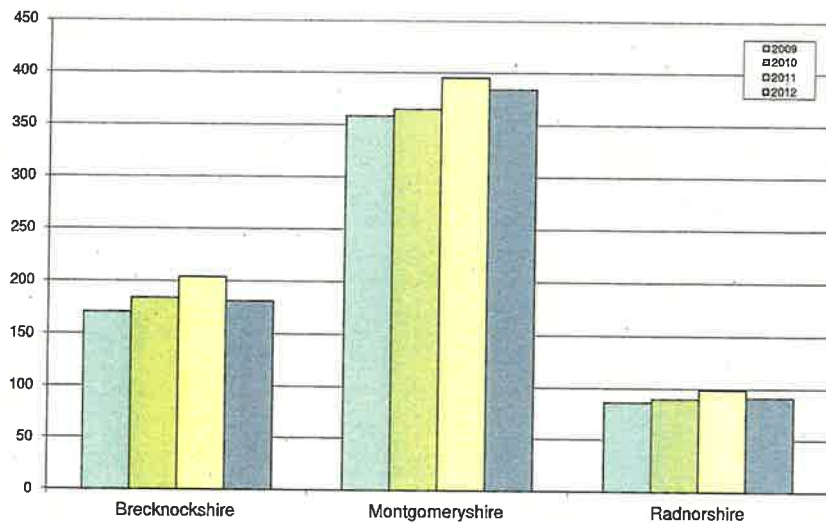
TOURISM EXPENDITURE 2012 : BY TYPE OF TOURIST : BY MONTH (£M's)



TOURISM EXPENDITURE : BY INDUSTRY SECTOR  
2012 COMPARED WITH 2011 (£M's)



ANNUAL TOURISM EXPENDITURE : ANALYSIS BY AREA (£M's)









# STEAM FINAL TREND REPORT FOR 2003-2014

Final

POWYS COUNTY COUNCIL

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STEAM FINAL TREND REPORT FOR 2003-2014		CONTENTS	
REPORT SUMMARY	Page	USER GUIDE	3
		COMPARATIVE HEADLINES	4
		KEY MEASURES	5-11
KEY IMPACT MEASURES: MONTHLY DATA BY VISITOR TYPE		DISTRIBUTION OF IMPACT By Visitor Type	13
		DISTRIBUTION OF IMPACT By Month	14
		DISTRIBUTION OF IMPACT By Sector	15
UNINDEXED ECONOMIC IMPACT	16-22	VISITOR NUMBERS	23-29
		VISITOR DAYS	30-36
		DIRECT AND TOTAL EMPLOYMENT	37-43
APPENDICES		ACCOMMODATION SUPPLY	44
		ANNEX	
STEAM CHARTS	A-1	INDEXED FINANCIAL DATA	45-59

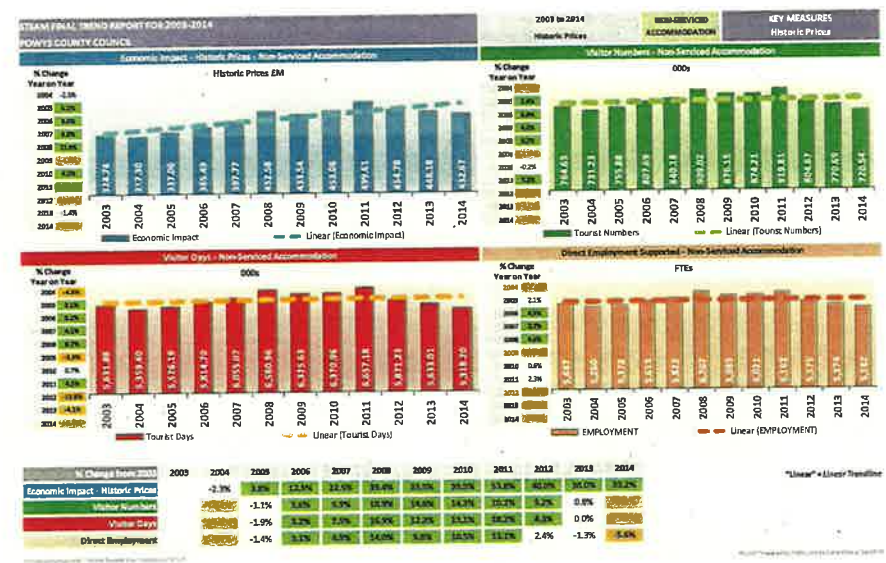
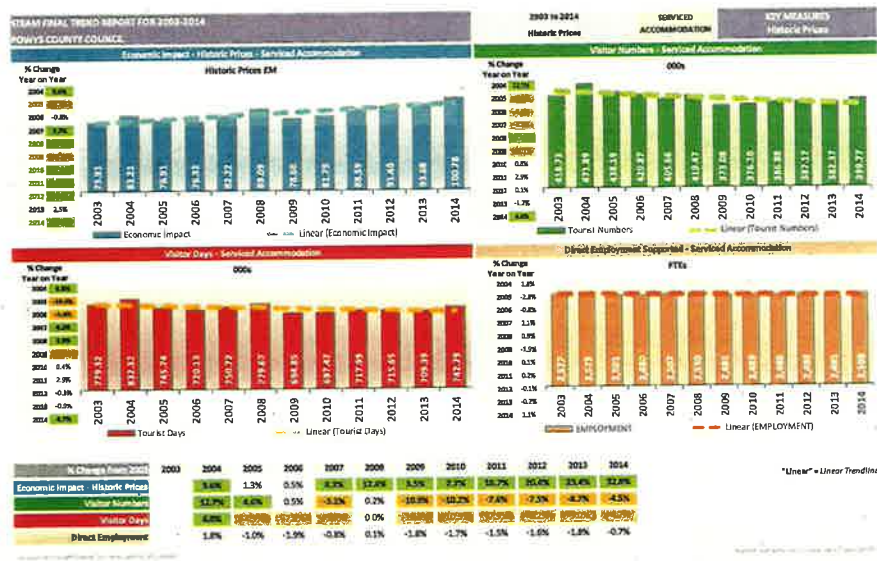
STEAM FINAL TREND REPORT FOR 2003-2014

STEAM FINAL TREND REPORT FOR 2003-2014

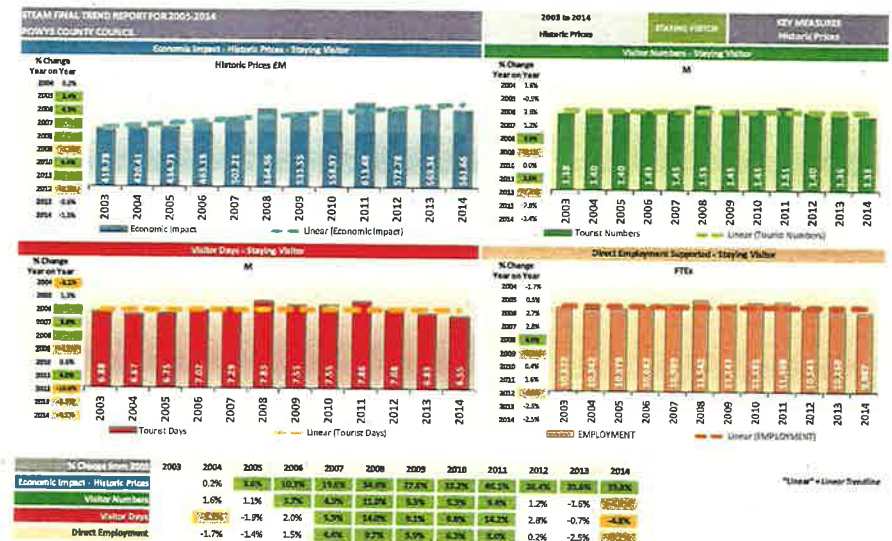
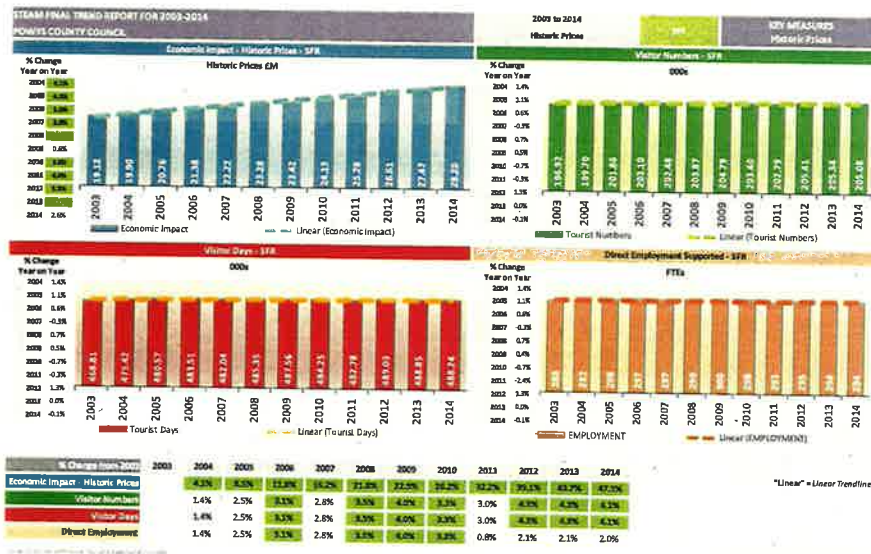


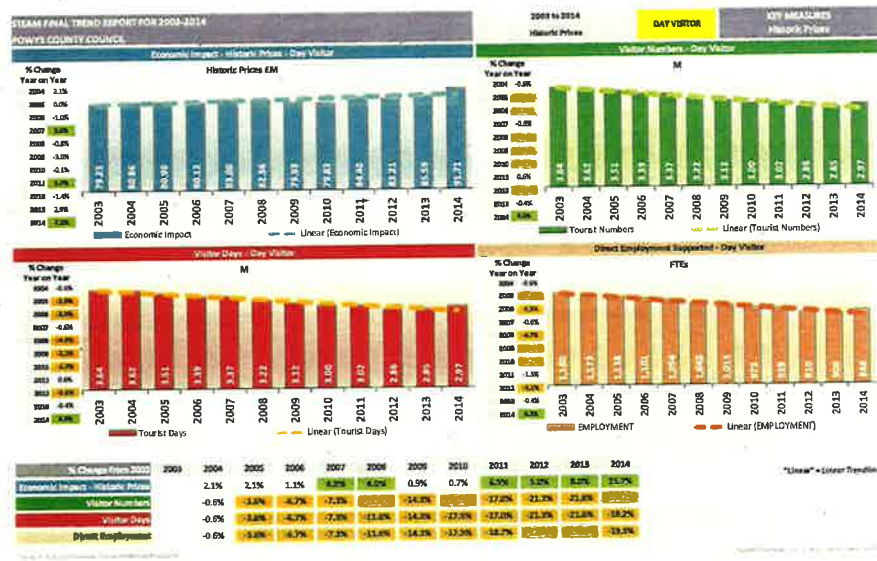
**Visitor Types:** Total  
Serviced Accommodation  
Non-Serviced Accommodation  
SFR  
Staying Visitor  
Day Visitor





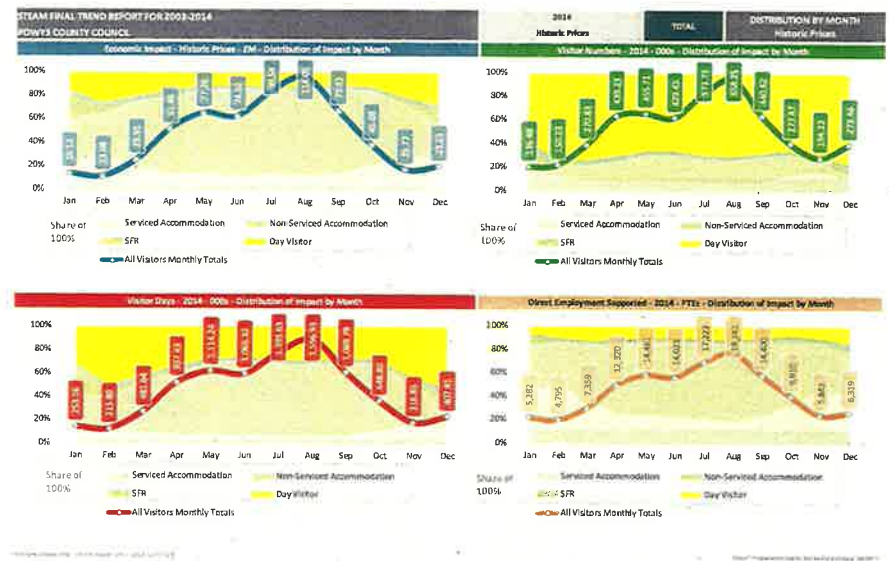
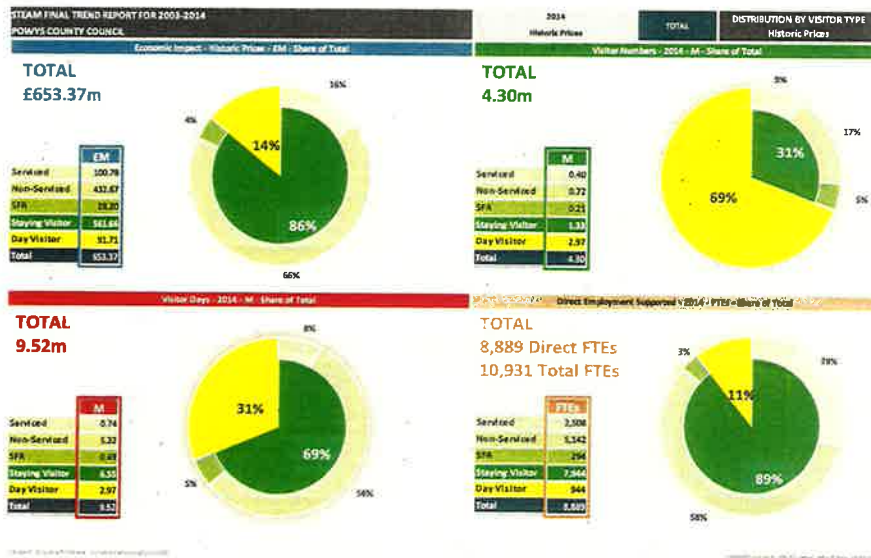






Distribution of Key Impacts by Visitor Type, Month and Sector for the Period 2003 to 2014

Visitor Types: Total  
Serviced Accommodation  
Non-Serviced Accommodation  
SFR  
Staying Visitor  
Day Visitor



STEAM FINAL TREND REPORT FOR 2003-2014													2003 to 2014	TOTAL	SECTORAL ANALYSIS
POWELL COUNTY COUNCIL													Historic Prices	Historic Prices	Historic Prices
SECTORAL DISTRIBUTION OF ECONOMIC IMPACT - £M INCLUDING VAT IN HISTORIC PRICES															
SECTOR / YEAR	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014			
Accommodation £M	97.82	97.74	98.31	84.38	66.58	74.31	68.43	70.41	74.51	72.81	72.06	72.06	2014	SECTORAL DISTRIBUTION OF ECONOMIC IMPACT - £M INCLUDING VAT IN HISTORIC PRICES	PRICES
Food & Drink £M	96.37	88.39	89.70	78.21	105.88	116.70	111.89	115.81	123.24	116.04	116.27	116.27		Accommodation (31.0%)	
Recreation £M	30.75	30.88	31.81	33.41	31.87	39.76	38.29	39.60	42.20	39.34	39.89	39.89		Food & Drink (37.8%)	
Shopping £M	89.21	49.30	71.72	75.30	30.96	89.41	83.58	86.99	94.71	88.85	89.04	88.96		Recreation (6.1%)	
Transport £M	70.88	70.84	73.41	77.53	83.30	32.34	38.66	82.24	94.54	92.88	93.85	93.79		Shopping (13.6%)	
Direct Revenue £M	118.84	718.88	318.81	145.83	172.50	417.31	392.39	407.24	455.17	406.52	409.31	409.31		Transport (14.4%)	
VAT £M	11.72	35.84	67.34	80.88	65.18	72.16	68.83	77.13	87.88	85.80	85.82	85.79			
Other Expenditure £M	174.15	175.80	188.84	165.11	137.89	147.83	162.81	154.66	180.33	178.72	184.09	183.14			
Indirect Expenditure £M	136.80	128.80	120.27	137.30	147.83	162.81	154.66	180.33	178.72	184.09	184.09	183.14			
TOTAL £M	499.01	511.24	515.33	545.37	585.21	647.32	615.68	636.80	697.68	656.00	654.30	653.27			

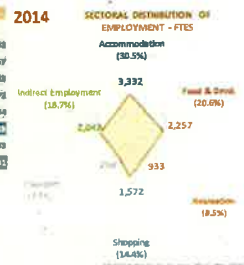


STEAM FINAL TREND REPORT FOR 2003-2014	Unindexed Economic Impact
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Unindexed Economic Impact by Month, Year and Visitor Type for the Period 2003 to 2014

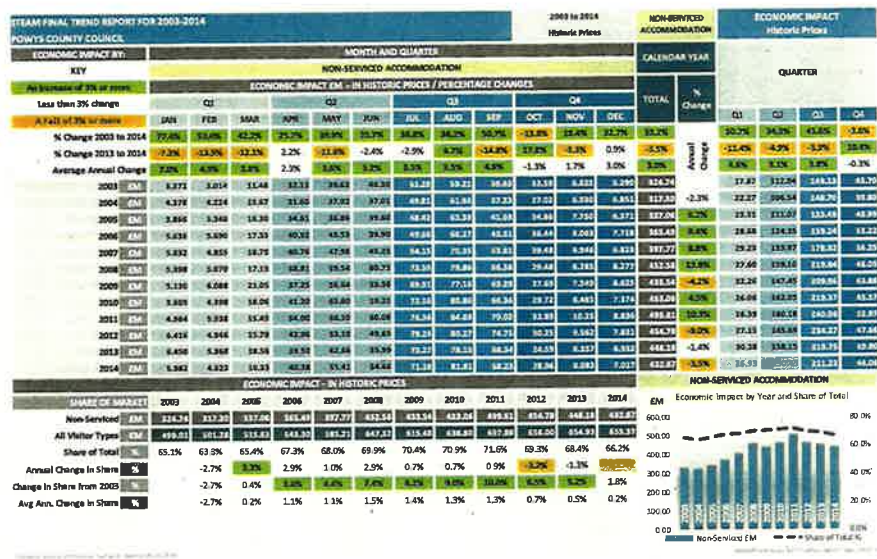
Visitor Types: Total  
 Serviced Accommodation  
 Non-Serviced Accommodation  
 SFR  
 Staying Visitor  
 Day Visitor

SECTORAL DISTRIBUTION OF EMPLOYMENT - FTEs													2003 to 2014
SECTOR / YEAR	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	
Accommodation FTEs	3,133	3,332	3,332	3,332	3,332	3,332	3,332	3,332	3,332	3,332	3,332	3,332	2014
Food & Drink FTEs	2,485	2,485	2,485	2,485	2,485	2,485	2,485	2,485	2,485	2,485	2,485	2,485	
Recreation FTEs	1,824	1,824	1,824	1,824	1,824	1,824	1,824	1,824	1,824	1,824	1,824	1,824	
Shopping FTEs	1,732	1,732	1,732	1,732	1,732	1,732	1,732	1,732	1,732	1,732	1,732	1,732	
Transport FTEs	849	849	849	849	849	849	849	849	849	849	849	849	
Direct Employment FTEs	8,682	8,682	8,682	8,682	8,682	8,682	8,682	8,682	8,682	8,682	8,682	8,682	
Indirect Employment FTEs	2,209	2,217	2,210	2,291	2,305	2,305	2,305	2,305	2,305	2,307	2,307	2,307	
TOTAL FTEs	11,701	11,114	11,111	11,183	11,288	12,587	12,552	12,155	12,322	11,453	11,165	10,933	

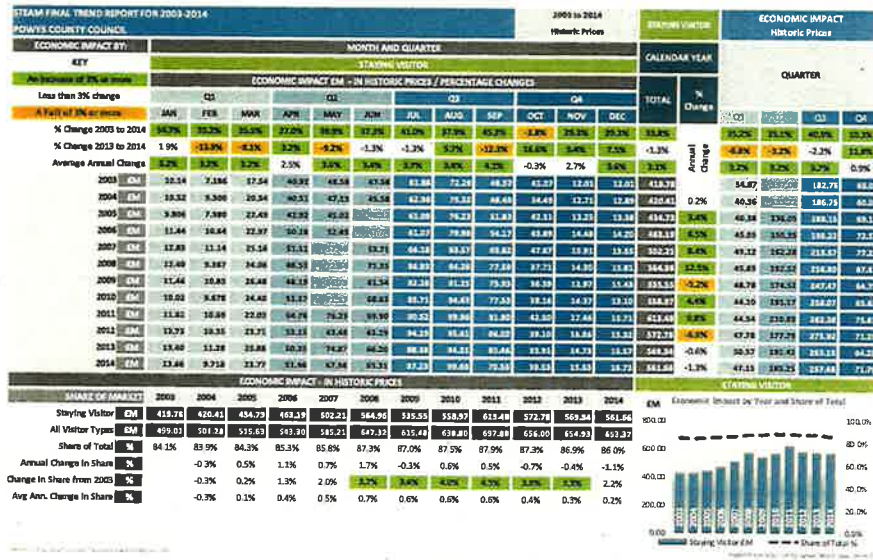




Page 17Page 18





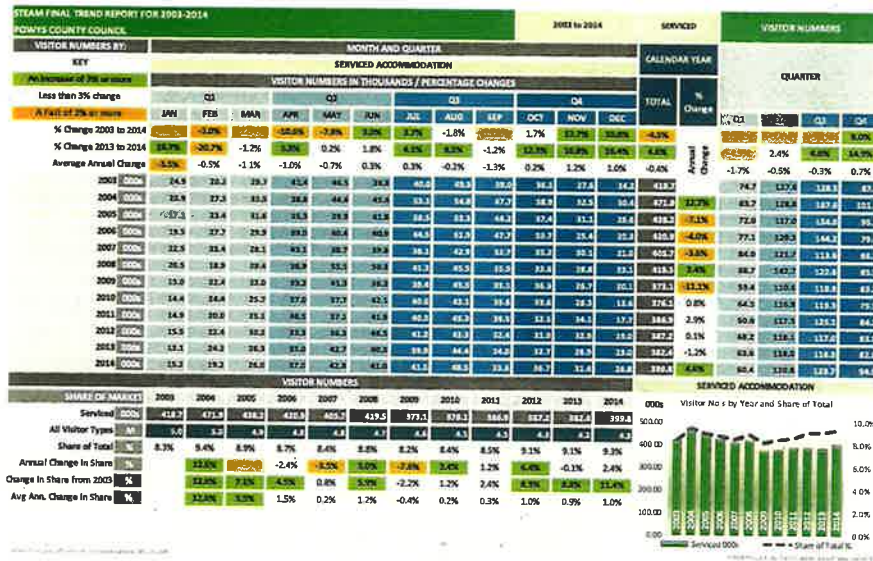


STAFF FINAL TRINO REPORT FOR 2003-2014 POWYS COUNTY COUNCIL	Visitor Numbers
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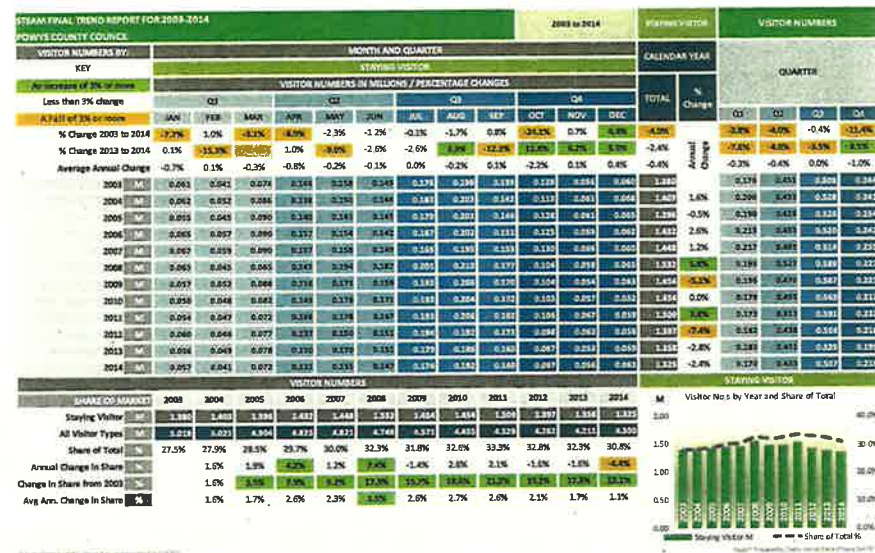
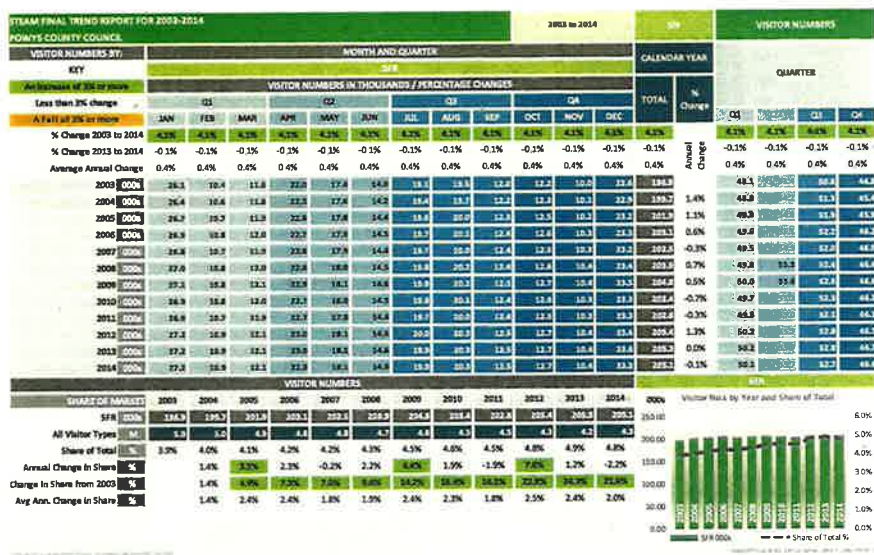
Visitor Numbers by Month, Year and Visitor Type for the Period 2003 to 2014

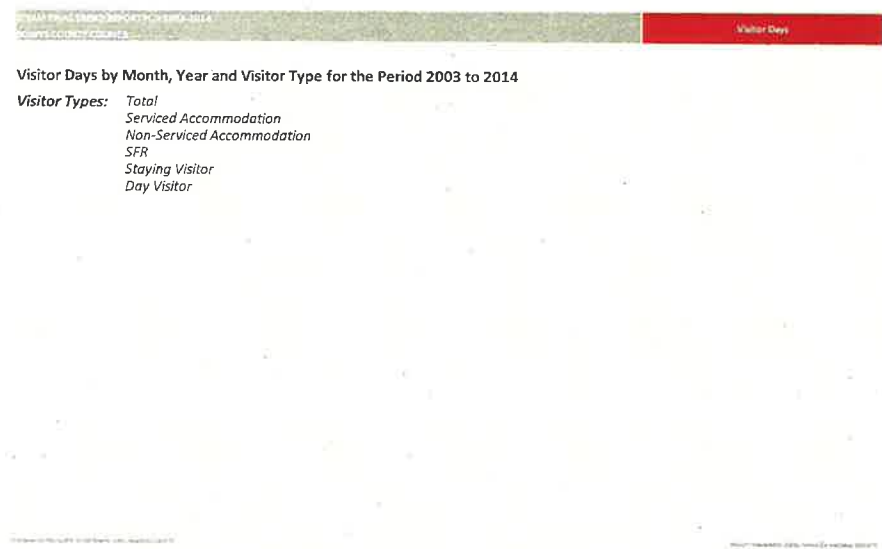
Visitor Types: Total  
Served Accommodation  
Non-Served Accommodation  
SFR  
Staying Visitor  
Day Visitor

STAFF FINAL TRINO REPORT FOR 2003-2014													2003 to 2014		TOTAL	VISITOR NUMBERS				
POWYS COUNTY COUNCIL																				
VISITOR NUMBERS BY:													MONTH AND QUARTER		CALENDAR YEAR	TOTAL	QUARTER			
KEY													TOTAL							
An increase of 2% or more													VISITOR NUMBERS IN MILLIONS / PERCENTAGE CHANGES		ANNUAL CHANGE	TOTAL				
Less than 3% change																				
A fall of 3% or more																				









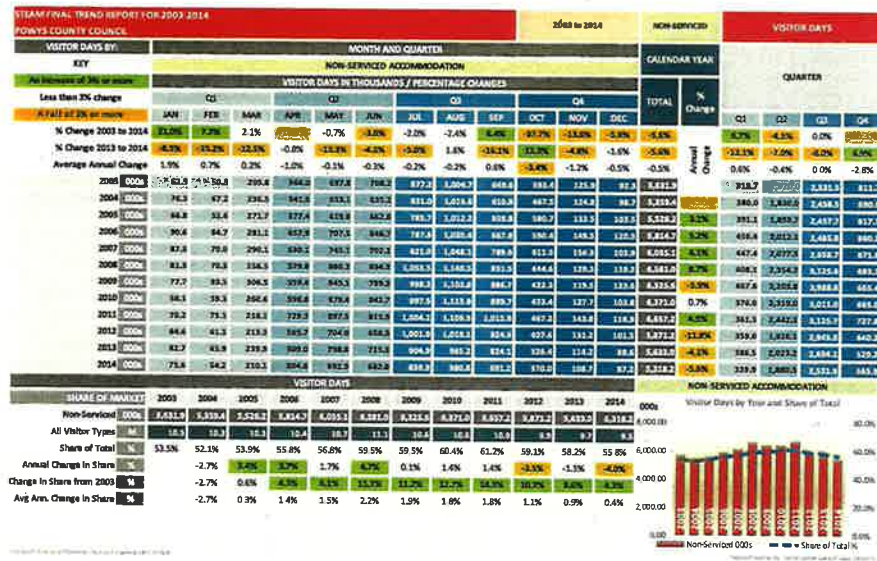
Visitor Days by Year and Share of Total

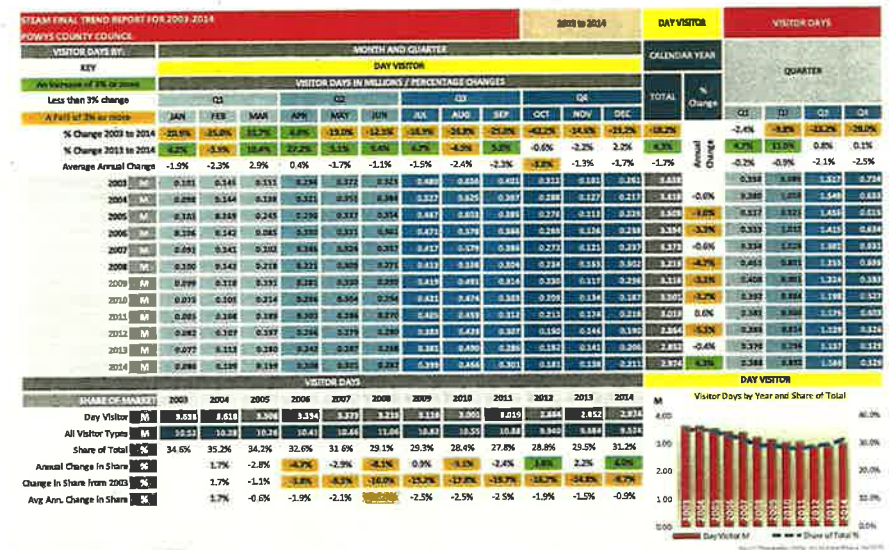
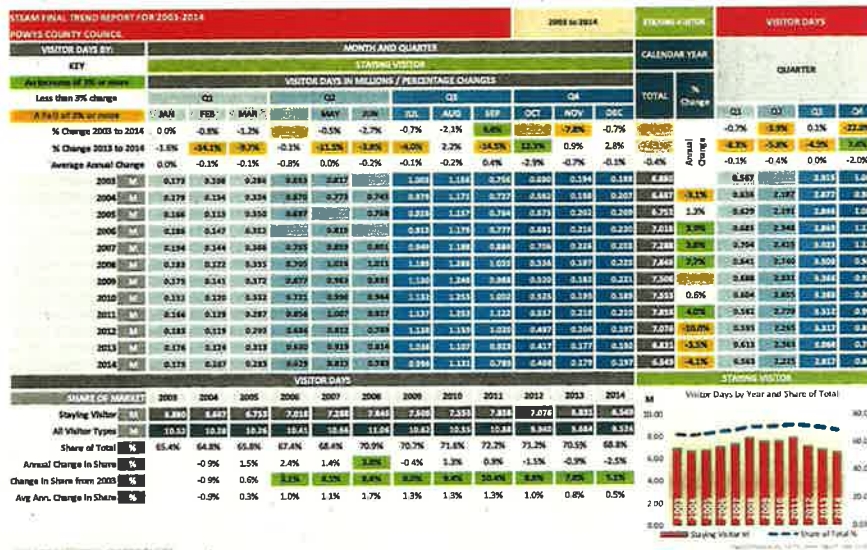
Year	Visitor Days	Share of Total %
1990	1000	100.0%
1991	980	98.0%
1992	960	96.0%
1993	940	94.0%
1994	920	92.0%
1995	900	90.0%
1996	880	88.0%
1997	860	86.0%
1998	840	84.0%
1999	820	82.0%
2000	800	80.0%
2001	780	78.0%
2002	760	76.0%
2003	740	74.0%
2004	720	72.0%
2005	700	70.0%
2006	680	68.0%
2007	660	66.0%
2008	640	64.0%
2009	620	62.0%
2010	600	60.0%
2011	580	58.0%
2012	560	56.0%
2013	540	54.0%
2014	520	52.0%

Year	Services (%)	Goods (%)
2000	75.3	24.7
2001	76.4	23.6
2002	76.2	23.8
2003	76.5	23.5
2004	76.8	23.2
2005	77.1	22.9
2006	77.4	22.6
2007	77.7	22.3
2008	78.0	22.0
2009	78.3	21.7
2010	78.6	21.4
2011	78.9	21.1
2012	79.2	20.8
2013	79.5	20.5
2014	79.8	20.2

Source: Eurostat, 2015. Data for 2014 are preliminary.

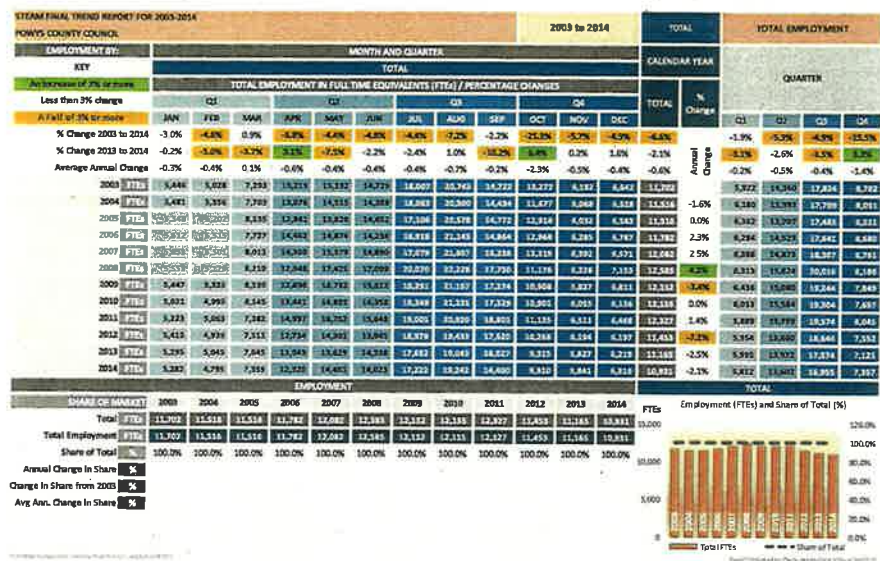






# Direct and Total Employment by Month, Year and Visitor Type for the Period 2003 to 2014

Visitor Types: Total  
Serviced Accommodation  
Non-Serviced Accommodation  
SFR  
Staying Visitor  
Day Visitor





Year	Services FTEs (FTEs)	Share of Total (%)
2013	2,600	22.5
2014	2,650	23.0

Year	Non-Serviced FTEs	Share of Total FTEs
2006	~5,500	~48%
2007	~5,800	~49%
2008	~5,900	~50%
2009	~6,000	~51%
2010	~6,100	~52%
2011	~6,200	~53%
2012	~6,300	~54%
2013	~6,400	~55%

STEAM FINAL TREND REPORT FOR 2003-2014													2007 to 2014		200	DIRECT EMPLOYMENT				
POWYS COUNTY COUNCIL																				
EMPLOYMENT BY:			MONTH AND QUARTER										CALENDAR YEAR							
KEY			FTE												QUARTER					
An increase of 2% or more			DIRECT EMPLOYMENT IN FULL TIME EQUIVALENTS (FTEs) / PERCENTAGE CHANGES																	
Less than 2% change																				
A fall of 2% or more																				



Figure 1 is a bar chart showing the share of total and day visitors of the 15 most visited museums in the Netherlands in 2013. The x-axis lists the museums: Rijksmuseum, Van Gogh Museum, Stedelijk Museum, Hermitage Museum, Museum Boijmans Van Beuningen, Museum De Pont, Museum Ons- en Jheronimus, Museum De Vries, Museum De Oude Kerk, Museum De Oude Kerk, Museum De Oude Kerk, Museum De Oude Kerk, Museum De Oude Kerk, Museum De Oude Kerk, Museum De Oude Kerk. The y-axis shows the share of total (0% to 30%) and day visitors (0% to 30%). The legend indicates 'Day Visitor of 15' (orange bars) and 'Share of Total' (black line).

Museum	Day Visitor of 15 (%)	Share of Total (%)
Rijksmuseum	28.5	28.5
Van Gogh Museum	27.5	27.5
Stedelijk Museum	26.5	26.5
Hermitage Museum	25.5	25.5
Museum Boijmans Van Beuningen	24.5	24.5
Museum De Pont	23.5	23.5
Museum Ons- en Jheronimus	22.5	22.5
Museum De Vries	21.5	21.5
Museum De Oude Kerk	20.5	20.5
Museum De Oude Kerk	19.5	19.5
Museum De Oude Kerk	18.5	18.5
Museum De Oude Kerk	17.5	17.5
Museum De Oude Kerk	16.5	16.5
Museum De Oude Kerk	15.5	15.5

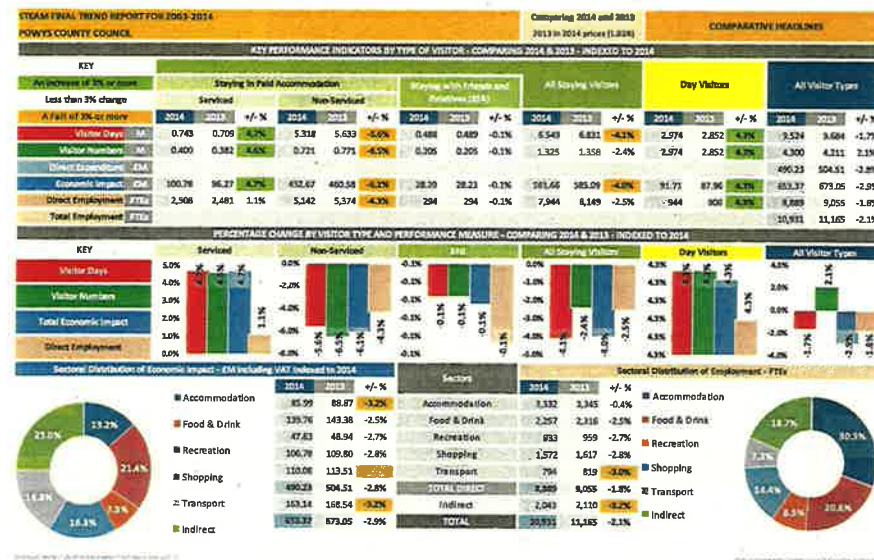
Month	Sales (Brls.)
JAN	13,546
FEB	6,492
MAR	11,204
APR	6,581
MAY	21,718
JUN	6,688
JUL	42,658
AUG	42,814
SEP	42,904
OCT	42,908
NOV	42,806
DEC	42,703

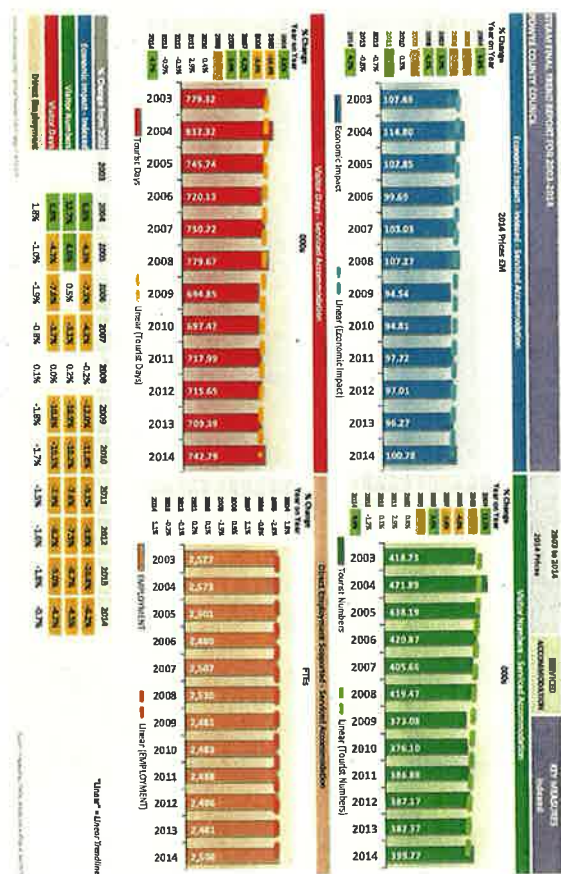
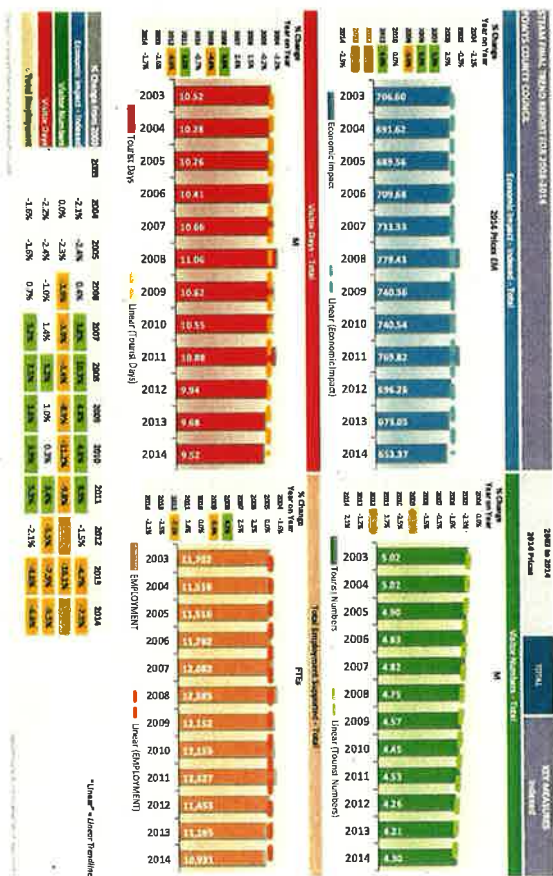
# Report Sections With Historic Financial Data Indexed to 2014 Prices

Sections:	Comparative Headlines	Visitor Types:	Total
	Key Measures		Serviced Accommodation
	Economic Impact		Non-Serviced Accommodation
	Sectoral Analysis		SFR
			Staying Visitor
			Day Visitor

## Indexation:

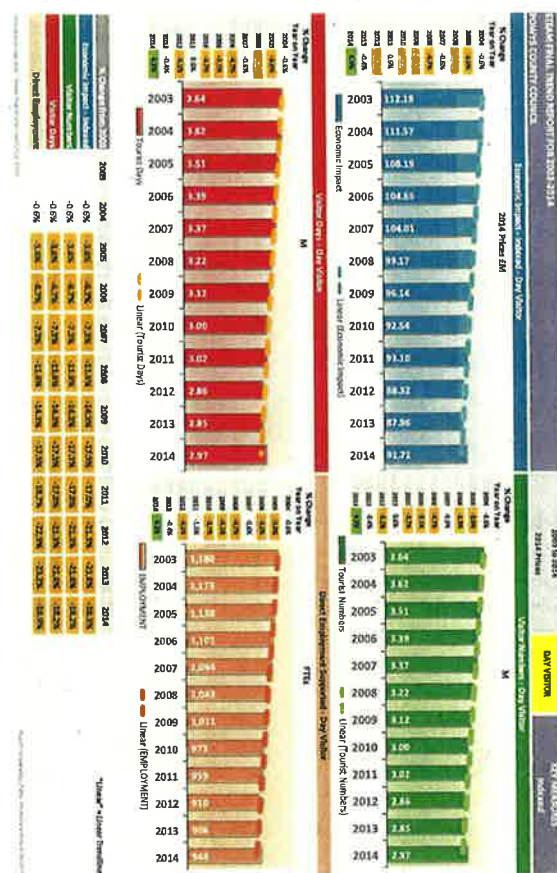
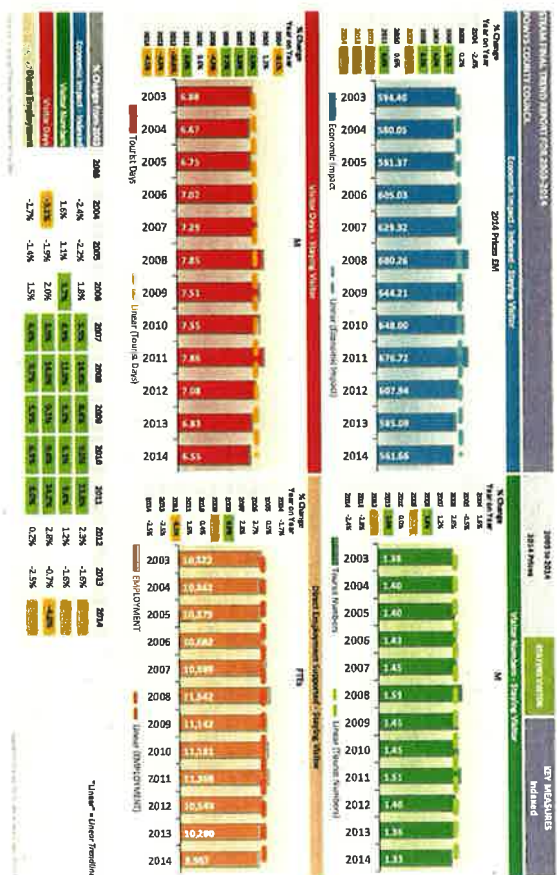
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2005 1.34
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2008 1.20
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2011 1.10
2012 1.06
2013 1.03
2014 1.00











STEAM FINAL TREND REPORT FOR 2003-2014  
POWYS COUNTY COUNCIL

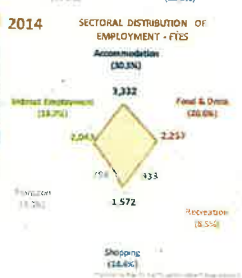
2003 to 2014  
2014 Prices

SECTORAL DISTRIBUTION OF ECONOMIC IMPACT - EM INCLUDING VAT INDEXED TO 2014

SECTOR / YEAR	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Accommodation EM	85.73	79.89	77.72	80.27	81.83	89.24	82.32	81.87	84.48	77.28	74.06	71.88
Food & Drink EM	128.24	119.45	125.31	118.29	132.43	140.31	134.04	134.27	139.08	123.29	119.43	118.48
Recreation EM	43.34	42.54	42.57	43.54	43.68	47.90	43.87	43.37	48.33	42.08	40.79	39.89
Shopping EM	88.59	91.81	91.81	98.34	102.66	107.46	102.84	103.50	104.47	94.39	91.50	88.38
Transport EM	100.28	97.79	98.23	101.01	104.38	113.13	104.54	106.83	109.48	97.70	94.50	91.73
Direct Revenue EM	450.36	441.31	439.25	451.41	466.79	494.39	471.54	471.87	479.48	434.85	420.43	408.33
VAT EM	79.31	77.34	76.35	79.01	81.63	86.43	82.34	82.34	86.00	84.93	84.50	81.70
Direct Expenditure EM	529.67	518.65	515.60	530.42	548.42	580.82	553.88	554.21	565.48	519.78	504.93	490.03
Indirect Expenditure EM	176.79	173.41	172.88	179.31	184.88	196.04	184.04	188.10	193.84	174.87	168.24	163.14
TOTAL EM	706.45	691.82	688.14	709.80	733.33	779.45	740.55	740.55	769.32	694.78	673.40	653.37

SECTORAL DISTRIBUTION OF EMPLOYMENT - FTEs

SECTOR / YEAR	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Accommodation FTEs	3,333	3,333	3,332	3,397	3,397	3,365	3,361	3,349	3,363	3,375	3,345	3,332
Food & Drink FTEs	2,485	2,491	2,418	2,498	2,568	2,725	2,598	2,601	2,637	2,388	2,316	2,257
Recreation FTEs	1,014	1,009	1,001	1,016	1,040	1,124	1,077	1,080	1,099	990	958	933
Shopping FTEs	1,732	1,689	1,694	1,737	1,792	1,902	1,818	1,821	1,846	1,637	1,572	1,572
Transport FTEs	869	846	836	874	904	961	923	926	935	844	828	794
Direct Employment FTEs	9,441	9,280	9,264	9,491	9,719	10,078	9,779	9,779	9,860	9,246	8,953	8,889
Indirect Employment FTEs	3,368	3,337	3,310	3,391	3,388	3,594	3,379	3,380	3,427	3,187	3,118	2,943
TOTAL FTEs	11,701	11,516	11,516	11,782	12,042	12,549	12,152	12,152	12,927	11,433	11,165	10,931



STEAM FINAL TREND REPORT FOR 2003-2014  
POWYS COUNTY COUNCIL

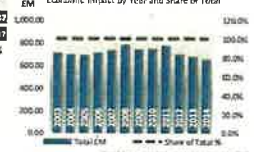
2003 to 2014  
2014 Prices

ECONOMIC IMPACT BY MONTH AND QUARTER

KEY	MONTH AND QUARTER												TOTAL	% Change	ECONOMIC IMPACT								
	TOTAL														TOTAL	% Change	QUARTER						
	ECONOMIC IMPACT EM - INDEXED TO 2014 / PERCENTAGE CHANGES																Q1	Q2	Q3	Q4			
As Increase of 2% within	JAN	FEB	MAR	Q1	Q2	Q3	Q4	JUL	AUG	SEP	OCT	NOV	DEC	Q1	Q2	Q3					Q4		
Less than 2% change	% Change 2003 to 2014	-0.2%	-0.3%	1.4%	-0.3%	-0.3%	-0.3%	-0.3%	-0.8%	1.5%	-0.7%	-0.9%	-0.9%	-0.2%	-0.2%	-0.2%	-0.2%	-0.2%					
A Fall of 2% or more	% Change 2013 to 2014	-0.1%	-0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%					
Average Annual Change	-0.7%	-1.0%	0.1%	-0.8%	-0.3%	-0.4%	-0.3%	-0.8%	-0.3%	-0.2%	-0.9%	-0.7%	-0.7%	-0.4%	-0.5%	-0.4%	-0.4%	-0.4%					
2003	EM	17.48	16.88	17.95	17.48	17.48	17.48	17.48	17.48	17.48	17.48	17.48	17.48	17.48	17.48	17.48	17.48	17.48					
2004	EM	17.53	17.28	17.40	17.40	17.40	17.40	17.40	17.40	17.40	17.40	17.40	17.40	17.40	17.40	17.40	17.40	17.40					
2005	EM	18.42	18.89	19.03	18.89	18.89	18.89	18.89	18.89	18.89	18.89	18.89	18.89	18.89	18.89	18.89	18.89	18.89					
2006	EM	18.31	18.27	18.81	18.27	18.27	18.27	18.27	18.27	18.27	18.27	18.27	18.27	18.27	18.27	18.27	18.27	18.27					
2007	EM	18.37	18.35	18.47	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35					
2008	EM	18.32	18.37	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35	18.35					
2009	EM	18.64	18.79	18.74	18.74	18.74	18.74	18.74	18.74	18.74	18.74	18.74	18.74	18.74	18.74	18.74	18.74	18.74					
2010	EM	18.87	18.81	18.88	18.81	18.81	18.81	18.81	18.81	18.81	18.81	18.81	18.81	18.81	18.81	18.81	18.81	18.81					
2011	EM	19.94	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92	19.92					
2012	EM	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29	19.29					
2013	EM	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14	19.14					
2014	EM	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12	19.12					
ECONOMIC IMPACT - INDEXED TO 2014												TOTAL	% Change	TOTAL									
Share of Market	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	EM	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Total	EM	706.45	691.82	688.14	709.80	733.33	779.45	740.55	740.55	769.32	694.78	673.40	653.37	633.37	613.37	593.37	573.37	553.37	533.37	513.37	493.37	473.37	
All Visitor Types	EM	706.45	691.82	688.14	709.80	733.33	779.45	740.55	740.55	769.32	694.78	673.40	653.37	633.37	613.37	593.37	573.37	553.37	533.37	513.37	493.37	473.37	
Share of Total	%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	
Annual Change in Share	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Change in Share from 2003	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	
Av. Ann. Change in Share	%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	

EM Economic Impact by Year and Share of Total

Year	EM	Share of Total
2003	706.45	100.0%
2004	691.82	97.8%
2005	688.14	97.4%
2006	709.80	100.5%
2007	733.33	103.9%
2008	779.45	110.3%
2009	740.55	104.8%
2010	740.55	104.8%
2011	769.32	108.9%
2012	694.78	98.4%
2013	673.40	95.3%
2014	653.37	92.5%





Year	Share of Total PM (Bar)	Share of Total N (Line)
2000	14.5	10.5
2001	15.0	11.0
2002	14.5	10.5
2003	14.0	10.0
2004	13.5	9.5
2005	13.0	9.0
2006	12.5	8.5
2007	12.0	8.0
2008	11.5	7.5
2009	11.0	7.0
2010	10.5	8.5



