

**CEREDIGION
COUNTY COUNCIL**

STEAM REPORT 2012

CEREDIGION COUNTY COUNCIL

STEAM REPORT 2012

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OVERVIEW OF STEAM

I. INTRODUCTION

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

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

2. VALIDATION OF STEAM

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

3. A BRIEF OUTLINE OF STEAM

3.1 STEAM - The Model

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

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

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

3.2 The STEAM Outputs

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

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

3.3 STEAM Inputs

At a minimum, the implementation of STEAM depends on:

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

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

a) **Bed Stocks**

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

b) **Number of Establishments**

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

c) **Use of Tourist Accommodation**

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

d) **Tourist Accommodation: Employment**

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

e) **Staying with Friends and Relatives**

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

f) Day Visitors

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

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

g) Rates of Daily Expenditure

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

h) Economic Multipliers

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

i) Indexing

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

j) Benchmarking

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

4. STEAM REPORT FORMAT

4.1 Introduction

Each STEAM Report consists of four main sections:

- Numeric Executive Summary
- Comparison Tables
- Appendices
- Charts

4.2 Numeric Executive Summary (NES)

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

a) Analysis by Sector of Expenditure

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

b) Revenue by Category of Expenditure

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

c) Tourist Days

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

d) Tourist Numbers

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

e) Sectors in which Employment is Supported

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

4.3 Comparison Tables (CT Pages)

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

4.4 Appendices

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

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

Appendix 3

Provides a glossary of terms which is self-explanatory.

Appendix 4

Considers the relationship of direct and indirect effects of tourism.

Appendix 5

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

Appendix 6

Reviews Day Visitors and their impacts.

Appendix 7

Report on statistical confidence levels in STEAM.

4.5 Charts

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

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CEREDIGION COUNTY COUNCIL
STEAM Report 2012
Numeric Executive Summary

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

Issued 16 July 2013

Analysis by Sector of Expenditure			
(£'s millions)	2012	2011	% change
Accommodation	42.28	44.73	-5
Food & Drink	61.00	63.78	-4
Recreation	21.06	21.96	-4
Shopping	33.87	35.16	-4
Transport	26.48	27.54	-4
Total Direct Revenue	184.69	193.17	-4
Indirect Expenditure	75.73	78.60	-4
VAT	36.94	38.63	-4
TOTAL	297.36	310.41	-4

Revenue by Category of Visitor			
(£'s millions)	2012	2011	% change
Serviced Accommodation	34.45	39.30	-12
Non-Serviced Accommodation	213.22	221.49	-4
SFR	9.85	9.98	-1
Day Visitors	39.84	39.64	0
TOTAL	297.36	310.41	-4

Tourist Days			
(Thousands)	2012	2011	% change
Serviced Accommodation	426.1	482.7	-12
Non-Serviced Accommodation	6,387.2	6,655.4	-4
SFR	279.1	282.8	-1
Day Visitors	1,371.2	1,364.4	0
TOTAL	8,463.6	8,785.3	-4

Tourist Numbers			
(Thousands)	2012	2011	% change
Serviced Accommodation	221.5	252.0	-12
Non-Serviced Accommodation	988.2	1,021.9	-3
SFR	117.2	118.8	-1
Day Visitors	1,371.2	1,364.4	0
TOTAL	2,698.1	2,757.1	-2

Sectors in which Employment is supported			
(FTE's)	2012	2011	% change
Direct Employment			
Accommodation	1,881	1,881	-0
Food & Drink	1,255	1,312	-4
Recreation	526	548	-4
Shopping	635	659	-4
Transport	243	253	-4
Total Direct Employment	4,540	4,654	-2
Indirect Employment	1,006	1,045	-4
TOTAL	5,546	5,698	-3

Ceredigion

Analysis by Category by Sector of Expenditure

Serviced Accommodation	
Analysis by Sector of Expenditure	
(£'s millions)	2012
Accommodation	14.06
Food & Drink	4.67
Recreation	0.79
Shopping	1.24
Transport	1.96
Total Direct Revenue	22.71
VAT	4.54
Total Direct Expenditure	27.25

Non-Serviced Accommodation	
Analysis by Sector of Expenditure	
(£'s millions)	2012
Accommodation	28.22
Food & Drink	45.42
Recreation	16.75
Shopping	23.69
Transport	17.06
Total Direct Revenue	131.14
VAT	26.23
Total Direct Expenditure	157.37

SFR	
Analysis by Sector of Expenditure	
(£'s millions)	2012
Food & Drink	2.21
Recreation	0.70
Shopping	2.07
Transport	1.24
Total Direct Revenue	6.23
VAT	1.25
Total Direct Expenditure	7.47

Day Visitors	
Analysis by Sector of Expenditure	
(£'s millions)	2012
Food & Drink	8.70
Recreation	2.82
Shopping	6.87
Transport	6.22
Total Direct Revenue	24.61
VAT	4.92
Total Direct Expenditure	29.54

Analysis by Sector of Expenditure	
(£'s millions)	2012
Accommodation	42.28
Food & Drink	61.00
Recreation	21.06
Shopping	33.87
Transport	26.48
VAT	36.94
Total Direct Expenditure	221.63
Indirect Expenditure	75.73
Total Economic Impact	297.36

STEAM *Bedstock Analysis*

Accommodation Category	Ceredigion 2012		Ceredigion 2011	
	Establishments	Beds / Sleeping Spaces	Establishments	Beds / Sleeping Spaces
<i>Serviced Accommodation</i>				
+50 room hotels	3	271	3	271
11-50 room hotels	29	1028	29	1028
<10 room hotels/others	317	2390	317	2390
<i>Serviced Total</i>	<i>349</i>	<i>3689</i>	<i>349</i>	<i>3689</i>
<i>Non-Serviced Accommodation</i>				
Self catering	293	5794	293	5794
Static caravans/chalets	75	4692	75	4692
Touring caravans/camping	114	8928	114	8928
Not-for-hire statics		22456		22456
<i>Non-Serviced Accommodation Total</i>	<i>482</i>	<i>41870</i>	<i>482</i>	<i>41870</i>
TOTAL	831	45,559	831	45,559

Tourism Impacts 2012

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

<p>May</p>	<p>First half of month cool and wet; second half warm and dry.</p> <p>Late May Spring Bank holiday moved to June</p> <p>25th – 28th May – Olympic Torch relay stages in Wales</p>	<p>OECD says that the Eurozone crisis is the single biggest threat to the global economic outlook.</p> <p>Slowing economic activity in India and China.</p>
<p>June</p>	<p>Wettest June since records began, with flooding in Wales.</p> <p>4th and 5th of June – Spring Bank Holiday and Queen’s Diamond Jubilee Holiday.</p>	
<p>July</p>	<p>Coollest July since 2000, with sunshine below average and rainfall considerably above average.</p> <p>27th July – opening ceremony of London 2012 Olympics</p>	<p>Global food prices rose by 10% in July.</p>
<p>August</p>	<p>Average sunshine and temperatures with above average rainfall. The June-August period was the wettest in the UK since 2012.</p> <p>OECD forecast the UK economy to shrink by 0.7% in 2012.</p> <p>12th August – Olympics closing ceremony</p> <p>29th August – Paralympics opening ceremony</p>	

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

CEREDIGION COUNTY COUNCIL

All £'s 2012 indexed

6 Year Summary

Issued 16 July 2013

Analysis by Sector of Expenditure (£'s millions)	2012	2011	2010	2009	2008	2007
Accommodation	42.3	44.7	43.6	43.4	47.7	45.1
Food & Drink	61.0	63.8	64.3	63.7	68.1	65.1
Recreation	21.1	22.0	22.3	22.0	23.5	22.4
Shopping	33.9	35.2	35.7	35.5	37.6	36.2
Transport	26.5	27.5	27.8	27.7	29.4	28.3
Indirect Expenditure	75.7	78.6	77.7	77.2	82.6	79.0
VAT	36.9	38.6	33.9	33.7	36.1	34.5
TOTAL	297.4	310.4	305.3	303.2	324.9	310.6

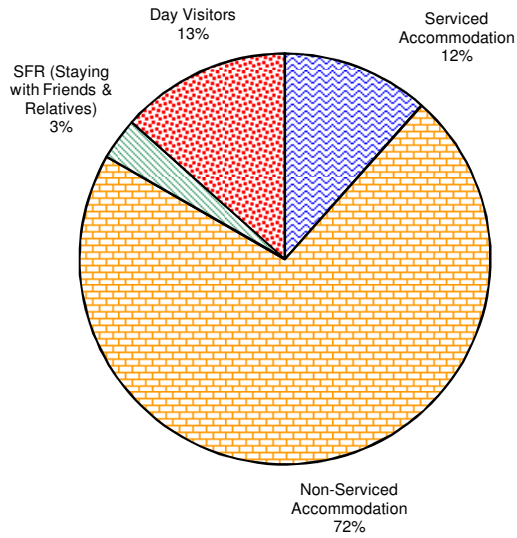
Revenue by Category of Visitor (£'s millions)	2012	2011	2010	2009	2008	2007
Serviced Accommodation	34.5	39.3	33.6	34.1	39.0	38.6
Non-Serviced Accommodation	213.2	221.5	221.6	217.4	234.4	218.8
SFR	9.8	10.0	9.9	10.1	10.1	10.0
Day Visitors	39.8	39.6	40.2	41.6	41.3	43.1
TOTAL	297.4	310.4	305.3	303.2	324.9	310.6

Tourist Days (Thousands)	2012	2011	2010	2009	2008	2007
Serviced Accommodation	426	483	413	417	478	457
Non-Serviced Accommodation	6,387	6,655	6,641	6,517	6,986	6,577
SFR	279	283	281	287	286	284
Day Visitors	1,371	1,364	1,384	1,433	1,421	1,482
TOTAL	8,464	8,785	8,718	8,653	9,171	8,799

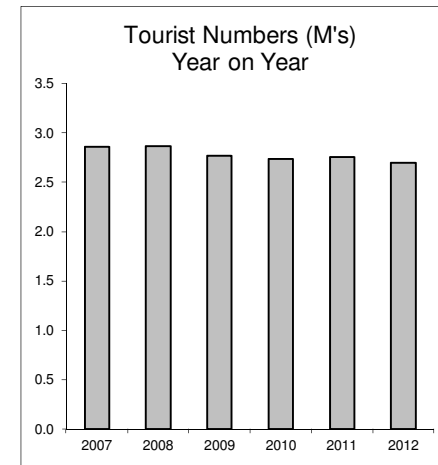
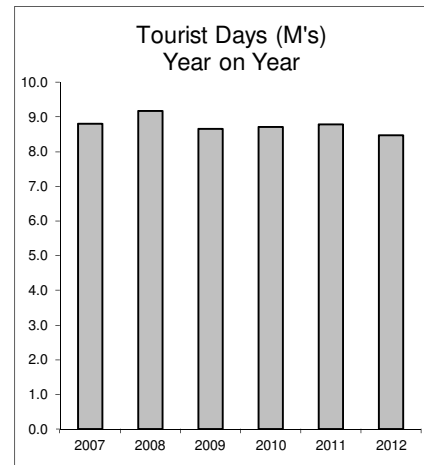
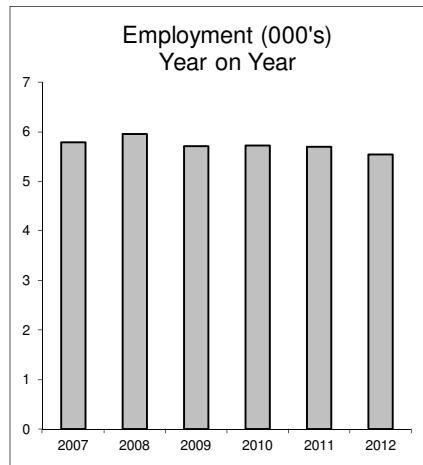
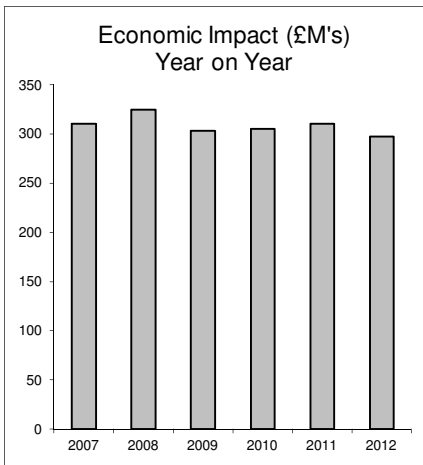
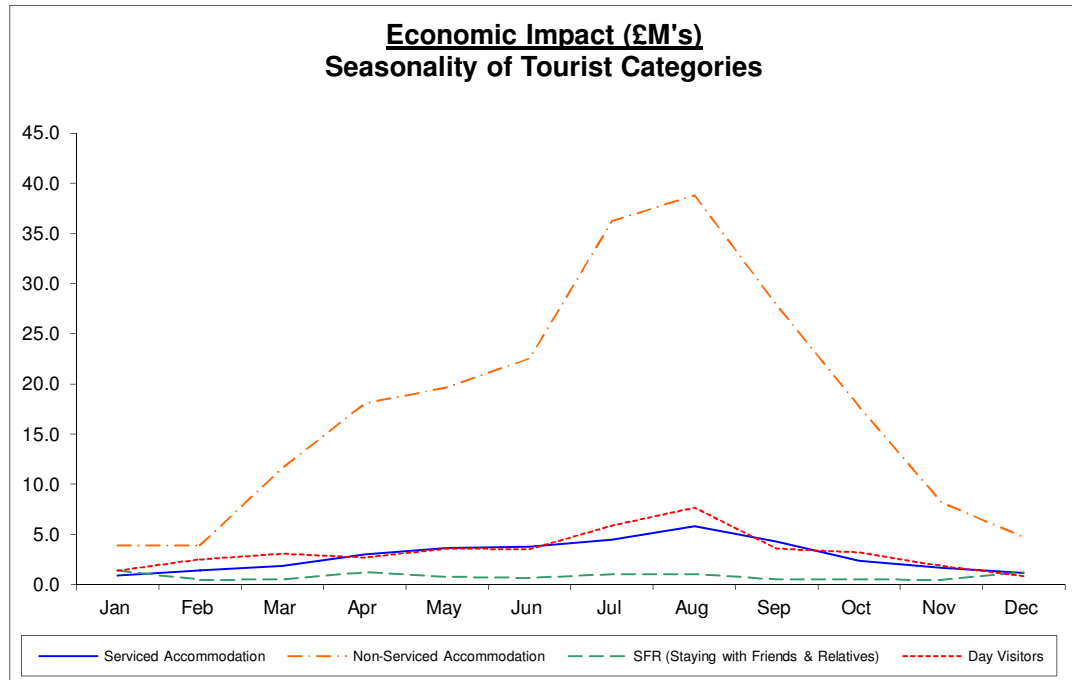
Tourist Numbers (Thousands)	2012	2011	2010	2009	2008	2007
Serviced Accommodation	221	252	214	218	250	237
Non-Serviced Accommodation	988	1,022	1,019	1,000	1,075	1,019
SFR	117	119	118	120	120	119
Day Visitors	1,371	1,364	1,384	1,433	1,421	1,482
TOTAL	2,698	2,757	2,735	2,771	2,867	2,857

Sectors in which Employment is supported (FTE's)	2012	2011	2010	2009	2008	2007
Direct Employment						
Accommodation	1,881	1,881	1,869	1,878	1,870	1,881
Food & Drink	1,255	1,312	1,323	1,310	1,400	1,338
Recreation	526	548	556	550	587	559
Shopping	635	659	670	665	705	679
Transport	243	253	256	255	270	260
Total Direct Employment	4,540	4,654	4,674	4,658	4,831	4,718
Indirect Employment	1,006	1,045	1,054	1,048	1,121	1,072
TOTAL	5,546	5,698	5,728	5,706	5,952	5,790

Economic Impact Relative Impact of Tourist Categories



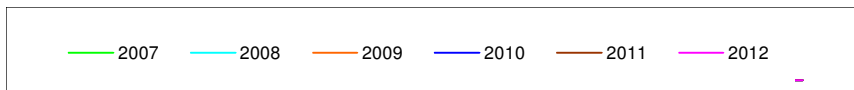
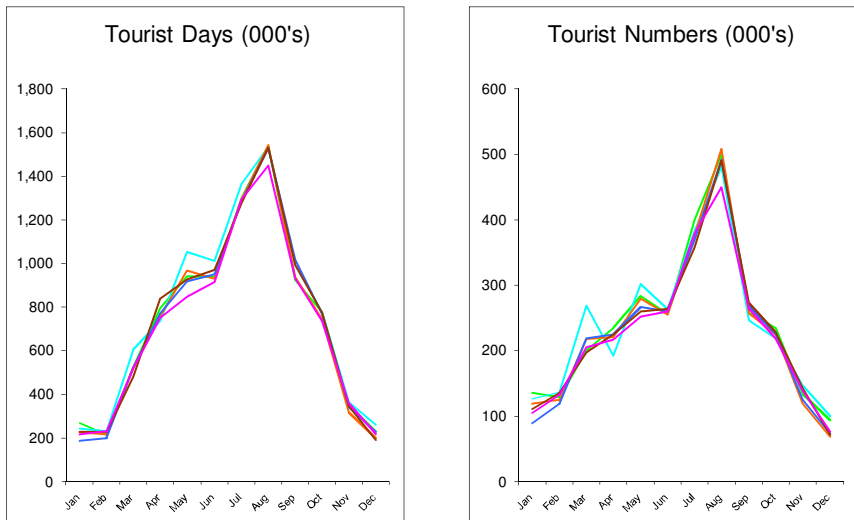
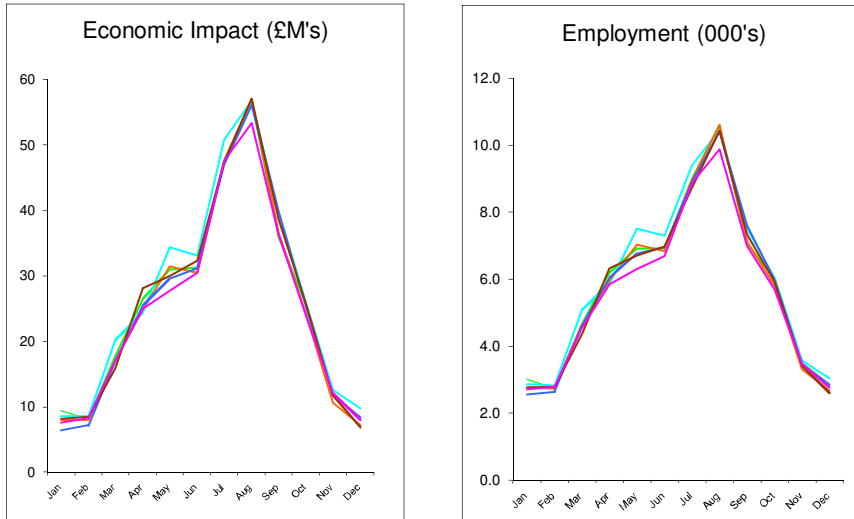
Economic Impact (£M's) Seasonality of Tourist Categories



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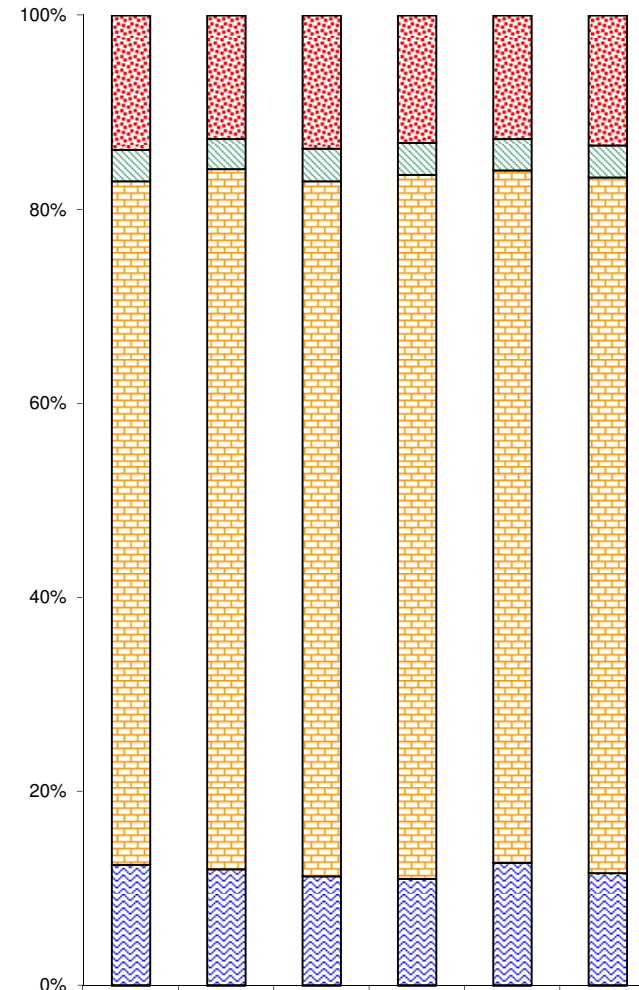
Indexation to 2012

Seasonality Comparisons of Major Indicators



Relative Impact Changes

Economic Impact (£M's)



	2007	2008	2009	2010	2011	2012
Day Visitors	43,058	41,349	41,620	40,192	39,639	39,836
SFR (Staying with Friends & Relatives)	10,016	10,110	10,120	9,912	9,977	9,847
Non-Serviced Accommodation	218,840	234,432	217,382	221,606	221,495	213,223
Serviced Accommodation	38,639	39,021	34,083	33,614	39,298	34,451

Economic Impact	Expenditure												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	5,599	6,103	12,767	18,667	20,746	22,718	35,441	39,704	27,042	17,860	9,063	5,916	221,626
Indirect Expenditure	1,915	2,154	4,357	6,321	6,959	7,729	12,184	13,634	9,289	6,059	3,070	2,061	75,732
Total	7,514	8,257	17,123	24,988	27,706	30,447	47,625	53,338	36,331	23,918	12,133	7,978	297,358

Economic Impact	Expenditure and Revenue												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	4,666	5,086	10,639	15,556	17,288	18,932	29,534	33,086	22,535	14,883	7,553	4,930	184,688
Indirect Expenditure	1,915	2,154	4,357	6,321	6,959	7,729	12,184	13,634	9,289	6,059	3,070	2,061	75,732
VAT	933	1,017	2,128	3,111	3,458	3,786	5,907	6,617	4,507	2,977	1,511	986	36,938
Total	7,514	8,257	17,123	24,988	27,706	30,447	47,625	53,338	36,331	23,918	12,133	7,978	297,358

Economic Impact	Generated by Category of Visitor												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	903	1,386	1,884	3,016	3,645	3,805	4,472	5,827	4,311	2,394	1,658	1,152	34,451
Non-Serviced Accommodation	3,870	3,889	11,649	18,053	19,646	22,520	36,265	38,785	27,874	17,752	8,164	4,755	213,223
SFR	1,370	460	523	1,249	803	619	1,004	1,063	548	547	426	1,234	9,847
Day Visitors	1,371	2,521	3,067	2,670	3,611	3,504	5,884	7,663	3,598	3,225	1,885	837	39,836
Total	7,514	8,257	17,123	24,988	27,706	30,447	47,625	53,338	36,331	23,918	12,133	7,978	297,358

Economic Impact	Sectors in which expenditure is made												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	808	1,089	1,916	2,921	3,083	3,590	7,954	8,722	6,934	2,633	1,534	1,095	42,279
Accommodation	1,579	1,640	3,706	5,446	6,129	6,651	9,243	10,400	6,750	5,267	2,576	1,612	60,998
Food & Drink	526	533	1,274	1,877	2,106	2,297	3,237	3,615	2,349	1,833	877	537	21,062
Recreation	996	992	2,089	2,997	3,342	3,585	5,127	5,800	3,655	2,894	1,430	961	33,869
Shopping	757	831	1,654	2,315	2,628	2,809	3,972	4,548	2,847	2,256	1,136	726	26,480
Transport	4,666	5,086	10,639	15,556	17,288	18,932	29,534	33,086	22,535	14,883	7,553	4,930	184,688
Total Direct Expenditure	4,666	5,086	10,639	15,556	17,288	18,932	29,534	33,086	22,535	14,883	7,553	4,930	184,688
VAT	933	1,017	2,128	3,111	3,458	3,786	5,907	6,617	4,507	2,977	1,511	986	36,938
Indirect Expenditure	1,915	2,154	4,357	6,321	6,959	7,729	12,184	13,634	9,289	6,059	3,070	2,061	75,732
Total	7,514	8,257	17,123	24,988	27,706	30,447	47,625	53,338	36,331	23,918	12,133	7,978	297,358

Population													Avg	
Total Population	75,900	75,900	75,900	75,900	75,900	75,900	75,900	75,900	75,900	75,900	75,900	75,900	75,900	75,900

Employment	Supported by tourism activity in these Categories												FTE's
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	1,109	1,168	1,273	1,376	1,418	1,427	1,404	1,467	1,396	1,330	1,225	1,163	1,313
Non-Serviced Accommodation	912	869	2,106	2,944	3,197	3,487	4,617	5,081	3,575	2,896	1,463	991	2,678
SFR	189	64	72	172	111	85	139	147	76	76	59	170	113
Day Visitors	180	331	402	350	474	460	772	1,005	472	423	247	110	435
Total Direct Employment	2,389	2,430	3,853	4,843	5,199	5,460	6,932	7,700	5,518	4,724	2,995	2,434	4,540
Indirect Employment	305	344	695	1,008	1,110	1,233	1,943	2,174	1,481	966	490	329	1,006
Total	2,695	2,774	4,548	5,851	6,309	6,692	8,875	9,874	7,000	5,690	3,484	2,762	5,546

Employment	Sectors in which employment is supported												FTE's
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	1,534	1,551	1,904	2,007	2,014	2,014	2,089	2,244	2,012	1,975	1,649	1,579	1,881
Food & Drink	390	405	915	1,344	1,513	1,642	2,281	2,567	1,666	1,300	636	398	1,255
Recreation	157	160	382	562	631	688	970	1,083	704	549	263	161	526
Shopping	224	223	470	674	752	807	1,154	1,305	822	651	322	216	635
Transport	83	92	182	255	290	310	438	502	314	249	125	80	243
Total Direct Employment	2,389	2,430	3,853	4,843	5,199	5,460	6,932	7,700	5,518	4,724	2,995	2,434	4,540
Indirect Employment	305	344	695	1,008	1,110	1,233	1,943	2,174	1,481	966	490	329	1,006
Total	2,695	2,774	4,548	5,851	6,309	6,692	8,875	9,874	7,000	5,690	3,484	2,762	5,546

Tourist Days	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	12.5	19.1	25.9	41.4	50.1	52.3	47.0	61.2	45.3	32.9	22.7	15.8	426
Non-Serviced Accommodation	118.6	110.2	371.7	581.5	650.5	725.7	1,014.8	1,093.0	749.1	576.9	257.1	138.0	6,387
SFR	38.8	13.0	14.8	35.4	22.8	17.5	28.5	30.1	15.5	15.5	12.1	35.0	279
Day Visitors	47.2	86.8	105.6	91.9	124.3	120.6	202.5	263.8	123.8	111.0	64.9	28.8	1,371
Total Tourist Days 000's	217.0	229.2	517.9	750.3	847.6	916.1	1,292.8	1,448.2	933.8	736.3	356.8	217.6	8,464

Tourist Numbers	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	7.1	12.1	15.7	21.1	23.3	27.0	22.8	31.0	24.1	17.0	11.2	9.2	221
Non-Serviced Accommodation	34.9	27.6	77.4	90.9	94.3	103.7	142.9	143.8	108.6	82.4	57.1	24.6	988
SFR	15.5	6.2	6.9	13.1	10.4	8.4	11.4	11.6	7.2	7.2	6.0	13.5	117
Day Visitors	47.2	86.8	105.6	91.9	124.3	120.6	202.5	263.8	123.8	111.0	64.9	28.8	1,371
Total Tourist Numbers 000's	104.7	132.7	205.6	217.0	252.2	259.7	379.6	450.2	263.7	217.7	139.2	76.1	2,698

Vehicle Days	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	3.2	6.6	9.3	10.8	14.4	14.5	12.2	15.9	11.8	8.9	6.2	4.1	118
Non-Serviced Accommodation	27.1	31.0	84.5	128.1	146.0	167.1	223.6	241.8	172.4	126.6	57.8	29.2	1,435
SFR	11.5	3.9	4.4	10.5	6.8	5.2	8.4	8.9	4.6	4.6	3.6	10.4	83
Day Visitors	9.3	19.6	23.8	18.2	24.5	27.2	40.0	52.1	24.5	25.1	14.6	5.7	285
Total Vehicle Days 000's	51.1	61.1	122.1	167.5	191.7	214.0	284.3	318.7	213.3	165.2	82.2	49.4	1,921

Vehicle Numbers	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	1.9	4.2	5.7	5.5	6.7	7.5	5.9	8.0	6.2	4.6	3.1	2.4	62
Non-Serviced Accommodation	8.0	7.8	17.6	20.0	21.2	23.9	31.5	31.8	25.0	18.1	12.8	5.2	223
SFR	4.6	1.8	2.0	3.9	3.1	2.5	3.4	3.4	2.1	2.1	1.8	4.0	35
Day Visitors	9.3	19.6	23.8	18.2	24.5	27.2	40.0	52.1	24.5	25.1	14.6	5.7	285
Total Vehicle Numbers 000's	23.7	33.4	49.1	47.5	55.5	61.0	80.8	95.4	57.8	49.9	32.3	17.3	604

BED STOCK (number of beds)	Average Available Sleeping Spaces												MAX
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	3,187	3,333	3,602	3,683	3,689	3,689	3,689	3,689	3,687	3,664	3,458	3,345	3,689
Non-Serviced Accommodation	13,669	10,203	36,142	41,673	41,867	41,867	41,870	41,870	41,859	40,767	25,276	14,411	41,870
Total BED STOCK (number of beds)	16,856	13,536	39,744	45,357	45,556	45,556	45,559	45,559	45,547	44,432	28,734	17,756	45,559

Economic Impact	Expenditure and Revenue												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	5,855	6,016	11,511	20,246	21,577	23,246	34,048	40,959	27,775	18,492	8,417	4,898	223,042
Indirect Expenditure	1,974	2,077	3,845	6,870	7,294	7,836	11,533	14,007	9,494	6,216	2,818	1,666	75,630
Total	7,829	8,093	15,356	27,116	28,871	31,082	45,581	54,966	37,270	24,708	11,235	6,565	298,672

Economic Impact	Expenditure and Revenue												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Revenue	4,879	5,014	9,593	16,872	17,981	19,372	28,374	34,133	23,146	15,410	7,014	4,082	185,868
Indirect Expenditure	1,974	2,077	3,845	6,870	7,294	7,836	11,533	14,007	9,494	6,216	2,818	1,666	75,630
VAT	976	1,003	1,919	3,374	3,596	3,874	5,675	6,827	4,629	3,082	1,403	816	37,174
Total	7,829	8,093	15,356	27,116	28,871	31,082	45,581	54,966	37,270	24,708	11,235	6,565	298,672

Economic Impact	Generated by Category of Visitor												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	1,371	1,787	2,128	3,099	2,818	3,851	5,812	6,662	4,579	3,180	1,589	935	37,812
Non-Serviced Accommodation	3,765	3,406	9,862	20,475	21,815	23,401	33,930	39,067	28,730	17,879	7,197	3,591	213,119
SFR	1,335	449	510	1,218	783	603	979	1,036	534	533	416	1,203	9,600
Day Visitors	1,358	2,452	2,855	2,324	3,455	3,226	4,860	8,200	3,427	3,116	2,033	835	38,141
Total	7,829	8,093	15,356	27,116	28,871	31,082	45,581	54,966	37,270	24,708	11,235	6,565	298,672

Economic Impact	Sectors in which expenditure is made												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Direct Expenditure	975	1,167	1,756	3,249	3,022	3,664	7,792	9,240	7,068	2,920	1,365	823	43,039
Accommodation	1,615	1,589	3,334	5,905	6,449	6,829	8,888	10,624	6,976	5,401	2,403	1,353	61,365
Food & Drink	525	503	1,132	2,048	2,251	2,364	3,085	3,673	2,428	1,860	814	449	21,133
Recreation	993	945	1,872	3,210	3,530	3,658	4,840	5,921	3,754	2,926	1,350	831	33,830
Shopping	772	809	1,499	2,461	2,730	2,855	3,769	4,675	2,920	2,303	1,081	626	26,501
Transport	4,879	5,014	9,593	16,872	17,981	19,372	28,374	34,133	23,146	15,410	7,014	4,082	185,868
Total Direct Expenditure	4,879	5,014	9,593	16,872	17,981	19,372	28,374	34,133	23,146	15,410	7,014	4,082	185,868
VAT	976	1,003	1,919	3,374	3,596	3,874	5,675	6,827	4,629	3,082	1,403	816	37,174
Indirect Expenditure	1,974	2,077	3,845	6,870	7,294	7,836	11,533	14,007	9,494	6,216	2,818	1,666	75,630
Total	7,829	8,093	15,356	27,116	28,871	31,082	45,581	54,966	37,270	24,708	11,235	6,565	298,672

Population													Avg	
Total Population	76,900	76,900	76,900	76,900	76,900	76,900	76,900	76,900	76,900	76,900	76,900	76,900	76,900	76,900

Employment	Supported by tourism activity in these Categories												FTE's
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	1,140	1,196	1,293	1,389	1,374	1,440	1,477	1,518	1,416	1,385	1,225	1,152	1,334
Non-Serviced Accommodation	916	834	1,966	3,311	3,549	3,719	4,538	5,328	3,810	3,001	1,397	893	2,772
SFR	192	64	73	175	112	87	141	149	77	77	60	173	115
Day Visitors	185	334	389	317	471	440	663	1,118	467	425	277	114	433
Total Direct Employment	2,433	2,429	3,722	5,192	5,507	5,684	6,818	8,112	5,770	4,888	2,959	2,332	4,654
Indirect Employment	327	344	637	1,139	1,209	1,299	1,911	2,321	1,574	1,030	467	276	1,045
Total	2,760	2,773	4,359	6,330	6,716	6,983	8,730	10,433	7,344	5,918	3,426	2,608	5,698

Employment	Sectors in which employment is supported												FTE's
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Accommodation	1,534	1,551	1,904	2,007	2,014	2,014	2,014	2,323	2,012	1,975	1,649	1,579	1,881
Food & Drink	414	408	855	1,515	1,654	1,752	2,280	2,725	1,790	1,386	617	347	1,312
Recreation	164	157	352	637	701	736	961	1,144	756	579	253	140	548
Shopping	232	221	438	751	826	856	1,132	1,385	878	684	316	194	659
Transport	88	93	172	282	313	327	432	536	335	264	124	72	253
Total Direct Employment	2,433	2,429	3,722	5,192	5,507	5,684	6,818	8,112	5,770	4,888	2,959	2,332	4,654
Indirect Employment	327	344	637	1,139	1,209	1,299	1,911	2,321	1,574	1,030	467	276	1,045
Total	2,760	2,773	4,359	6,330	6,716	6,983	8,730	10,433	7,344	5,918	3,426	2,608	5,698

Tourist Days	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	19.7	25.6	30.4	44.3	40.2	55.0	63.5	72.8	50.0	45.4	22.6	13.3	483
Non-Serviced Accommodation	119.7	100.8	334.1	675.9	739.9	782.9	1,008.7	1,135.8	805.9	601.7	238.9	111.1	6,655
SFR	39.3	13.2	15.0	35.9	23.1	17.8	28.8	30.5	15.7	15.7	12.2	35.4	283
Day Visitors	48.6	87.7	102.1	83.2	123.6	115.4	173.9	293.3	122.6	111.5	72.7	29.9	1,364
Total Tourist Days 000's	227.3	227.3	481.6	839.1	926.8	971.1	1,274.9	1,532.4	994.3	774.3	346.5	189.8	8,785

Tourist Numbers	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	11.2	16.3	18.4	22.5	18.7	28.4	30.7	36.8	26.6	23.4	11.2	7.7	252
Non-Serviced Accommodation	35.2	25.2	69.6	105.6	107.2	111.8	142.1	149.4	116.8	86.0	53.1	19.8	1,022
SFR	15.7	6.3	7.0	13.3	10.5	8.5	11.5	11.7	7.2	7.3	6.0	13.6	119
Day Visitors	48.6	87.7	102.1	83.2	123.6	115.4	173.9	293.3	122.6	111.5	72.7	29.9	1,364
Total Tourist Numbers 000's	110.8	135.5	197.1	224.6	260.0	264.1	358.2	491.3	273.3	228.2	143.0	71.1	2,757

Vehicle Days	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	5.1	8.8	11.0	11.5	11.6	15.2	16.5	18.9	13.0	12.3	6.1	3.5	134
Non-Serviced Accommodation	27.3	28.2	74.6	152.3	169.9	182.0	225.0	252.7	188.9	134.3	53.3	23.8	1,512
SFR	11.7	3.9	4.5	10.6	6.8	5.3	8.6	9.1	4.7	4.7	3.6	10.5	84
Day Visitors	9.6	19.8	23.1	16.4	24.4	26.1	34.3	57.9	24.2	25.2	16.4	5.9	283
Total Vehicle Days 000's	53.7	60.7	113.0	190.9	212.7	228.5	284.4	338.6	230.8	176.5	79.5	43.7	2,013

Vehicle Numbers	000's												TOTAL
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	2.9	5.6	6.6	5.9	5.4	7.9	8.0	9.5	6.9	6.3	3.1	2.0	70
Non-Serviced Accommodation	8.0	7.0	15.5	23.8	24.6	26.0	31.7	33.2	27.4	19.2	11.8	4.3	233
SFR	4.7	1.9	2.1	3.9	3.1	2.5	3.4	3.5	2.1	2.2	1.8	4.0	35
Day Visitors	9.6	19.8	23.1	16.4	24.4	26.1	34.3	57.9	24.2	25.2	16.4	5.9	283
Total Vehicle Numbers 000's	25.2	34.3	47.3	50.0	57.5	62.4	77.5	104.2	60.6	52.8	33.1	16.2	621

BED STOCK (number of beds)	Average Available Sleeping Spaces												MAX
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Serviced Accommodation	3,187	3,333	3,602	3,683	3,689	3,689	3,689	3,689	3,687	3,664	3,458	3,345	3,689
Non-Serviced Accommodation	13,669	10,203	36,142	41,673	41,867	41,867	41,870	41,870	41,859	40,767	25,276	14,411	41,870
Total BED STOCK (number of beds)	16,856	13,536	39,744	45,357	45,556	45,556	45,559	45,559	45,547	44,432	28,734	17,756	45,559

GLOSSARY OF TERMS

Average direct daily expenditure	derived from total direct revenue divided by the total number of visitor days
Average revenue per head	derived from total revenue divided by the total number of visitors
Bed stock	number of bed spaces
Category of expenditure	denotes areas of economic impact generated by: Accommodation, Food & Drink, Recreation, Shopping and Transport
Category of visitor	visitors are categorised according to type of accommodation used (+50 Room Hotels, 11-50 Room Hotels, <10 Room Hotels; Self-Catering, Touring/Camping) or as 'Day Visitors' or 'SFRs'
Commercial accommodation	denotes +50 Room Hotels, 11-50 Room Hotels, <10 Room Hotels, Guest Houses/B&Bs, Self-Catering, and Touring/Camping
Day visitors:	
- Tourist day visits	tourist day visits are defined as visits commencing from a home location for a non-routine purpose, for a duration of not less than 3 hours outside the normal habitat of the visitor. For STEAM purposes, day visits emanating from outside of the reporting area commencing from a location other than their permanent residence are also measured
- Intra-district tourist day visits	in addition to tourist day visits, as defined for STEAM purposes, intra-district day visits are those by persons residing within a district making day visits within that district
- Leisure day visits	in addition to tourist day visits, as defined for STEAM purposes, a leisure day visit is a trip taken from a person's home and not taken whilst staying away from home. Trips must be round trips taken from a person's home within the same day without spending a night away from home. The usual convention is that there is no minimum stay requirement; however, for the purposes of this report, a minimum stay of 3 hours is required
Direct revenue	denotes visitor expenditure within a zone or Borough area

Expenditure	denotes expenditure on direct items (Accommodation, Food & Drink, Recreation, Shopping and Transport) and indirect items
FTE	denotes full-time equivalent jobs
GTS (UK) Ltd	Global Tourism Solutions (UK) Ltd
High season	from April through to October
Indirect revenue	denotes secondary expenditure within a zone or Borough area. Measured in STEAM through the application of proxy variable multipliers derived from the Scottish Tourism Multiplier Study (1992)
Low season	from November through to March
Non-commercial accommodation	denotes resident households used as accommodation by SFR
Non-serviced accommodation	denotes Self-Catering, and Touring/ Camping
Peak month	the month where the majority of the Borough's volume, value or bed space availability occurs
Revenue	denotes income derived from expenditure
STEAM	Scarborough Tourism Economic Activity Monitor
Serviced accommodation	denotes +50 Room Hotels, 11-50 Room Hotels, <10 Room Hotels, and Guest Houses/B&Bs
Touring/Camping	Touring Caravans and Camping
Tourist	denotes someone staying overnight
SFR	Staying with Friends and Relatives
Visitor	denotes the aggregate of tourists, Day Visitors and SFR
Visitor activity	denotes visitor numbers and/or visitor days (i.e. visitor volume)
Visitor days	denotes the total number of visitors multiplied by the average length of stay
Visitor numbers	denotes the total number of visitors (Tourists, Day Visitors and SFR)
Zone	denotes sub-Borough area as defined by the Borough representatives

ECONOMIC EFFECTS

[Source: “A Guidance Pack from the Department for Culture, Media & Sport” 1998]

1. Indicators of the economic effects of tourism activity in the local area are likely to include estimates of local income, jobs and business linkages. The direct measurement of tourism activity, especially of tourism expenditure, presents only a partial picture of the economic impact of the tourism activity in an area:
 - The gross *direct* economic impact of tourism is the total value of tourism spending in the area. This covers the 'front-line' effects, looking at tourism spending in hotels, restaurants, shops, taxis, i.e. any business that receives visitor expenditure directly. The net direct impact, however, needs to take into account the value of goods and services that are imported into the area in order to supply the tourist with goods and services.
 - *indirect* effects arise from the generation of economic activity by subsequent rounds of expenditure (e.g. as hotels purchase food and drinks from local suppliers and use the services of local laundries, builders, banks, utility companies, etc.) Not all these effects will arise in the local area since some such expenditure will go to suppliers elsewhere in the region or nationally.
 - *induced* effects arise from the spending of income accruing to local residents from wages and profits during the direct and indirect rounds.
 - *leakages* of expenditure out of the local economy: such as savings and taxation, as well as the costs of imports of goods and services from outside the area already mentioned above.
 - *opportunity costs*: to take into account the cost of using scarce resources for tourism as opposed to alternative uses, as, for example, spending on the provision of tourist information centres, car parking and other facilities used by visitors. When tourism substitutes one form of expenditure and economic activity for another, this is known as the displacement effect.
 - *investment activity* arising from capital investment in new facilities for visitors by private or public sectors (which also involve some consideration of opportunity cost.)
2. These are complex issues. There is guidance from HM Treasury on economic impact assessments. Employment effects are similarly difficult to measure precisely, but one simple approach is to track employment in 'tourism related industries'.
3. In conclusion, there is a frequently occurring temptation to attribute over-precision to the ability to measure indirect effects. Wherever appropriate and possible, STEAM reports separate direct and indirect estimates.

EMPLOYMENT

STEAM, both as a model and a process, takes advantage of various sources of information both to drive the model and benchmark the outputs. Such sources of information include:

- Some sub-regional estimates of numbers employed in tourism-related industries are available from NOMIS (National Online Manpower Information System) at the University of Durham. Some data are available quarterly from NOMIS, which allows the marked seasonal patterns in tourism employment to be taken into account.
- Local business surveys which give average numbers of core staff per type and size of establishment. Employment can be estimated by applying these averages to the local stock data.
- STEAM makes adjustments to the core staff in accordance with occupancy percentages above certain thresholds. This takes account of the times when temporary or part-time staff will be required.
- Employment resulting from tourist expenditure upon food and drink, recreation and leisure, shopping and transport, is more the stuff of 'multipliers' than direct estimation.
- The Office for National Statistics (ONS) publishes quarterly statistics covering employment in the following tourism related industries. (These are used to provide the official estimates for employment in the tourism related industries.)

Standard Industrial Classification (1992) Class

55.1 Hotels

55.2 Camping sites and other provision of short stay accommodation

55.3 Restaurants

55.4 Bars, public houses and nightclubs

63.3 Travel agencies and tour operators

92.5 Library, archives, museums and other cultural activities

92.6 Sporting activities

92.7 Other recreational activities

(Note that some of these categories are combined in the ONS tables but the data may be available from NOMIS)

DAY VISITORS AND THEIR IMPACTS IN STEAM

Defining Tourist Day Visits

STEAM defines a tourist day visit as one which crosses a boundary from one area into another area, for a period of at least three hours for non-routine leisure purposes.

The Source of Tourist Day Visitor Estimates

- STEAM uses as its baseline, elements of research undertaken by CURDS¹ (Centre for Urban and Regional Development Studies) and the TORG (Transport Operations Research Group) as the start point for calculation of local authority tourism day visitor volume estimates.
- The CURDS / TORG report was commissioned by the Departments of Employment and National Heritage and the method used in the research became established as the method of estimating the number of leisure day visits to each English local authority district. This was for the purpose of calculating the related element local government Standard Spending Assessment.
- These *leisure day visits* are defined as non-routine trips undertaken (away from home, but not involving an overnight stay) for one of four broad leisure purposes:
 - Outdoor activities
 - Visiting primary attractions (inc. shopping, eating out, sport, theatre)
 - Visiting scarce attractions (inc. sightseeing, shows, museums, zoos)
 - Visiting friends and relatives
- The research splits these into *intra* (source and destination of visitor within the district) and *other* (source of visitor from outside the district)
- Both *intra* and *other* trips are longer than 3 hours duration and are for “leisure purposes” as defined in the 1988/89 Leisure Day Visit Survey.
- STEAM uses the *other* data by district as the source data for the baseline day visitor estimates, thus excluding trips made by visitors originating from within the destination district.

Seasonality and Trends in Day Visitor Volume

- The baseline day visitor figure is further affected by a set of statistics to vary it from year to year and to spread the annual figure across the months, as required in the STEAM modelling process.
- The process of spreading the annual figure across the months utilises Tourist Information Centre visitor numbers and Visitor Attractions data. To be suitable for the task, these statistics must be:
 - available for the full 12 months of the year, and
 - be consistently measured for at least two years
- The process of identifying the change in tourist numbers from year to year (on a month-on-month basis) again utilises Tourist Information Centre visitor numbers and visitor numbers to attractions - these statistics are checked for consistency before use. Both monthly and annual estimates of visitor numbers can be utilised in the model.

Expenditure by Tourist Day Visitors

STEAM uses visitor expenditure data from visitor surveys to assist in the calculation of expenditure by all types of visitor. In the vast majority of cases this derives from survey work undertaken by Taylor Nelson Sofres (TNS) in England, Scotland and Wales on behalf of national agencies and other partners, including Global Tourism Solutions (UK) Ltd (GTS).

¹ Both at the University of Newcastle upon Tyne

As new sources of expenditure data become available, GTS re-assesses the expenditure assumptions in the Model, and where appropriate, updates these assumptions based on new data (where it is sufficiently robust). In this way, the expenditure data used to produce this report replaces previously available TNS survey data from Scotland. Where new survey data shows significant changes in Rates of Daily Expenditure (RatODEs), GTS, with its clients, assesses the need to update previous economic impact estimates, to ensure consistency across an established trend period.

The STEAM Model applies Rates of Daily Expenditure based on visitor expenditure on:

- Food and Drink
- Recreation
- Shopping
- Transport

Additionally, for *staying visitors*, expenditure on tourist accommodation is estimated using accommodation capacity information (bed stock), accommodation tariffs and performance data (occupancy).

The baseline expenditure data is updated annually to reflect the impact of inflation, using the Retail Price Index (RPI)

STATISTICAL CONFIDENCE LEVELS IN STEAM

STEAM is a model, so any level of confidence in the results depends on the sampling errors in the data inputs. So how do we test STEAM?

- Quality control to ensure there are no data entry errors and that data inputs are *fit for purpose*
- Critical to all models is: ‘Do random shocks² destabilise them or do they converge?’ We have evaluated STEAM for convergence and shown that it does so quite easily. Thus the *Law of Large Numbers* holds, in that any disturbances amongst the component parts are smoothed out when it comes to aggregation, so any outliers in the input data do not have a disproportionate impact on the overall results.
- On behalf of GTS (UK) Ltd, Professor Stephen Wanhill has tested the aggregate data from 2000-2004 in the model by devising *Pseudo Sampling Errors* and by examining in detail the outputs for all of Wales (selected for this exercise on the basis of size and length of trend series). At Fisher’s 95% Confidence Level this gave us +/- 5.06% for expenditure, +/- 3.01% for employment and +/- 3.56% for tourist days, based on our estimate of the percentage of coverage of the known accommodation stock and day visits in Wales as a whole.

Should more stringent confidence levels be applied (99.9% for example), the sampling error remains low, being +/- 8.49% for expenditure, +/- 5.05% for employment and +/- 5.97% for tourist days, again based on our estimate of the percentage of coverage of the known accommodation stock and day visits in Wales as a whole for the period 2000 to 2004.

Sir Ronald Fisher³ devised these standard statistical confidence tests for quality control purposes in the 1920s. The choice of 95% confidence level to test statistical results has subsequently become an accepted standard practice. It means that we can be 95% confident that the true result lies within the boundaries +/- given.

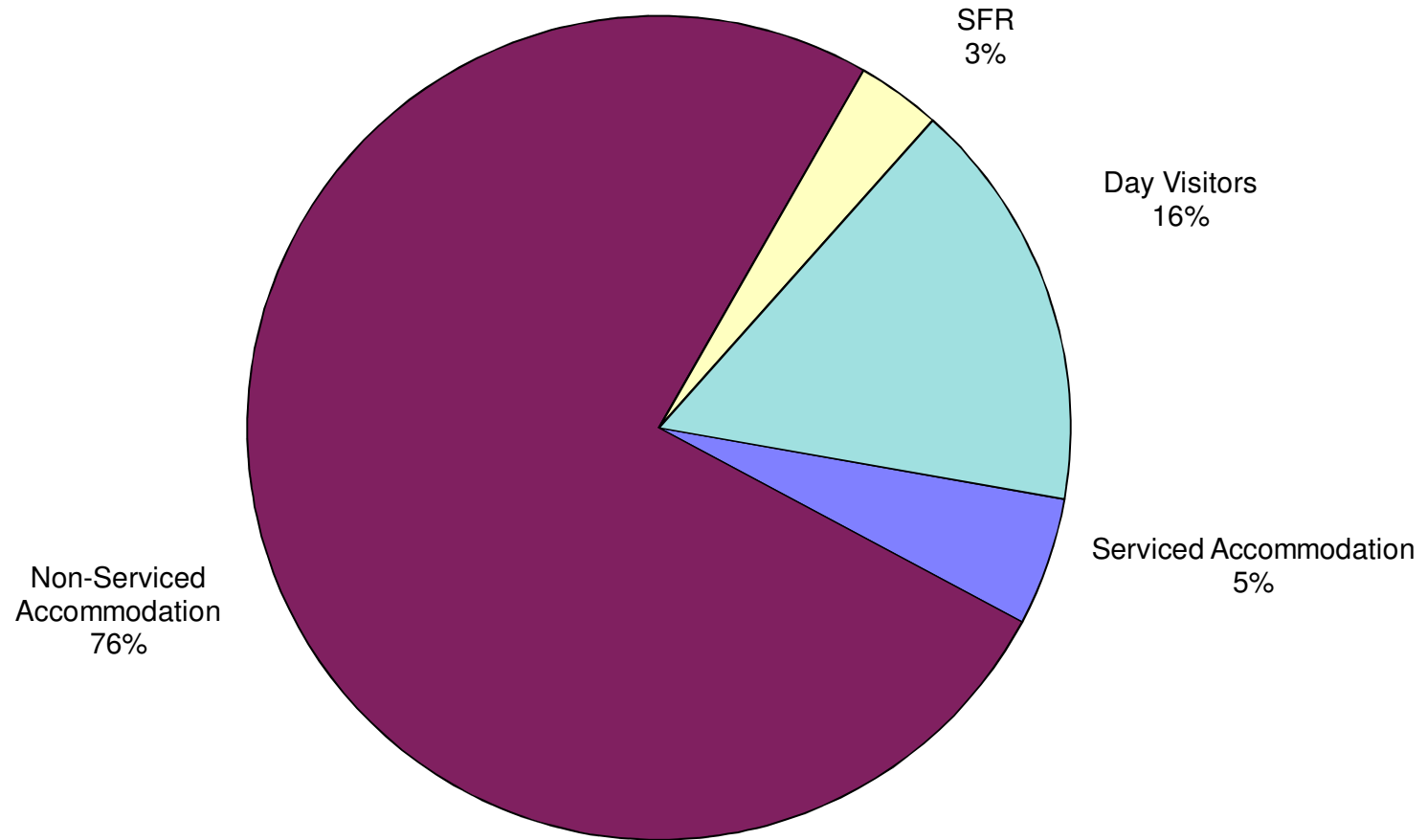
By way of comparison, the 95% confidence level sampling errors in the 2004 International Passenger Survey were +/- 3.1% for expenditure, +/- 3.0% for tourist numbers and +/- 4.6% for tourist nights. This is at a UK level – at infra-national and regional levels these errors would be higher.

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

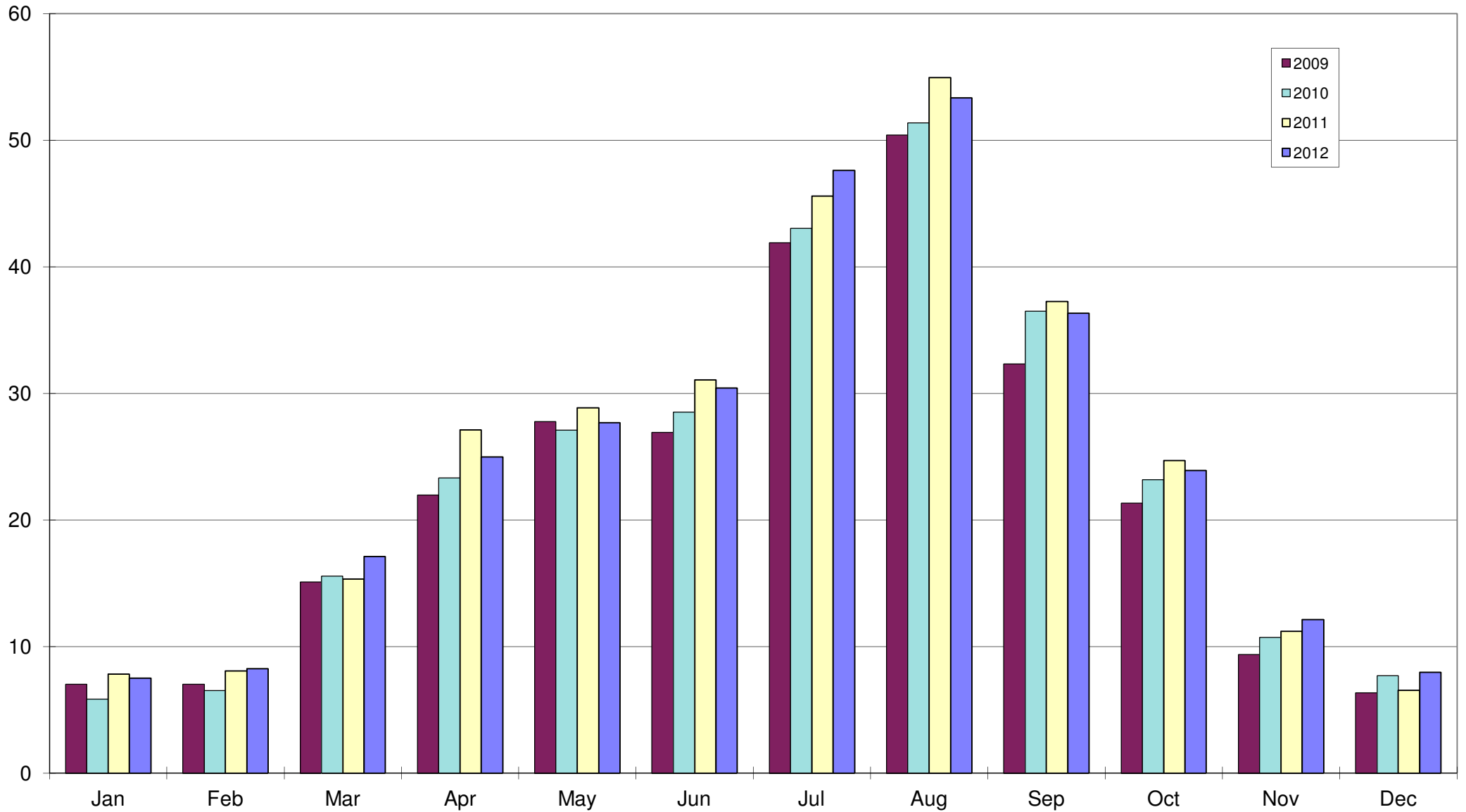
² Caused by unusual or eccentric events

³ Sir Ronald Aylmer Fisher (1890 – 1967)

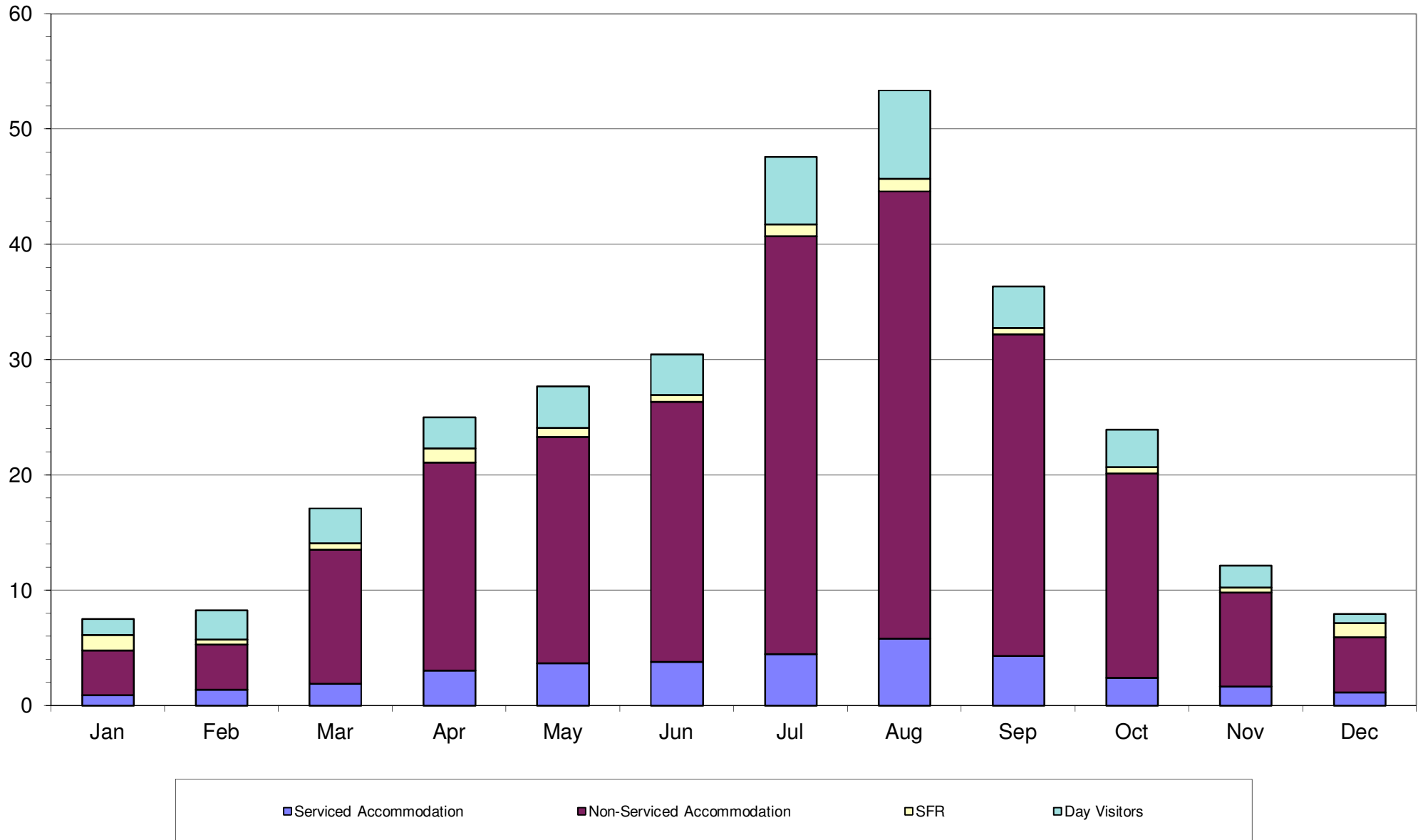
8.5 MILLION TOURIST DAYS : 2012 : BY TYPE OF TOURIST



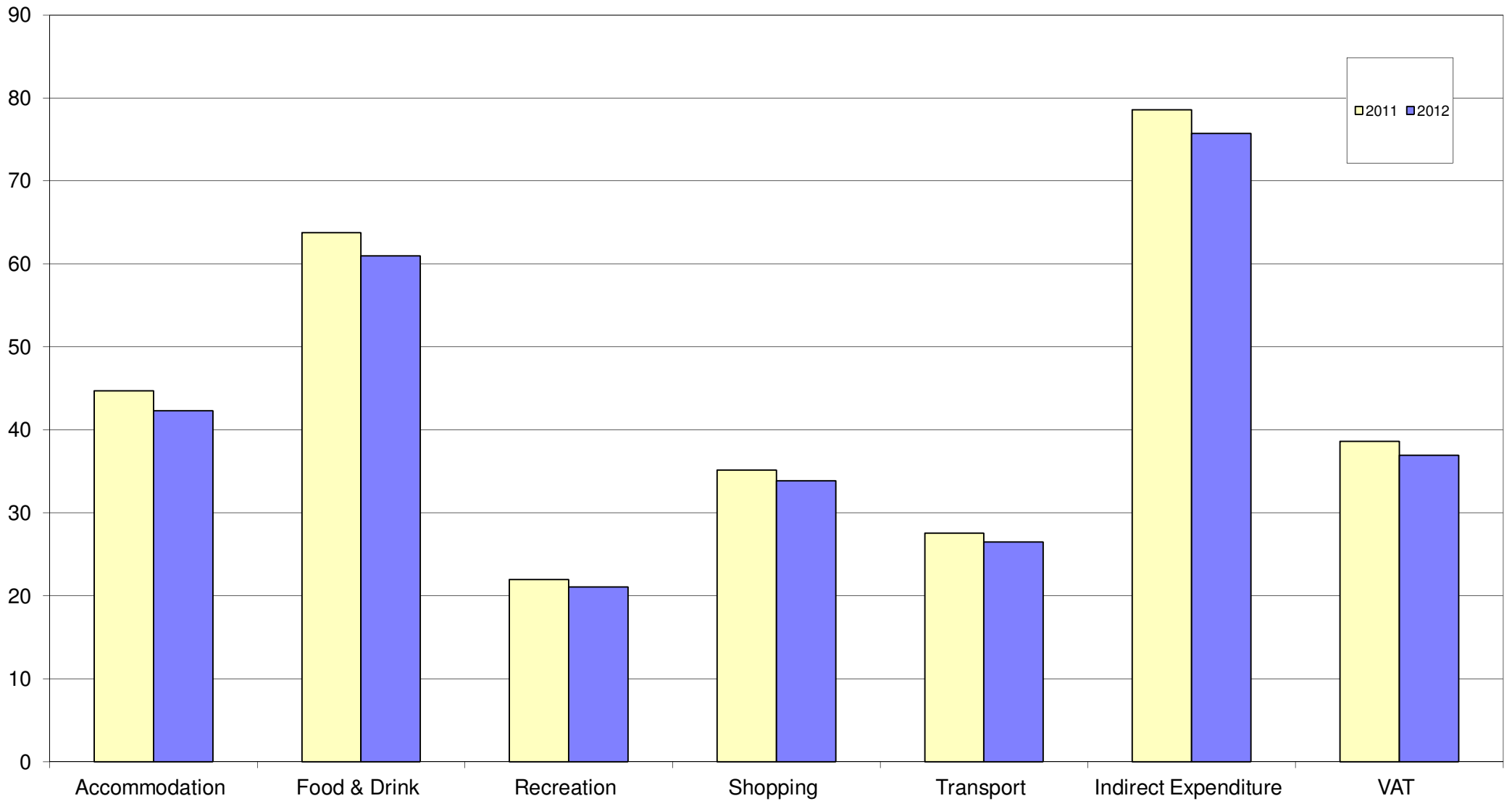
TOURISM EXPENDITURE : 2009 - 2012 : BY MONTH (£M's)



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 (£M's)

