

4 TOURISM INDUSTRY SIZE AND DISTRIBUTION

This chapter examines the supply side of tourism in the South West. It considers:

- The size and composition of the tourism industry
- The distribution of the product across the South West region

The first sections looks at accommodation enterprises. This is followed by a consideration of visitor attractions and activity tourism operators. Next, evidence on the significance of the retail and catering sector is presented. Finally, some quantitative evidence on the supply side of the tourism industry over the last few years, based on the Standard Industry Classification system, is given.

4.1 Accommodation

A starting point for quantifying the volume of accommodation is to examine and 'test' the accuracy of the TRIPS database for the South West region. TRIPS is the most comprehensive source of information on tourism accommodation.

At the end of 2002, there were 16,629 commercial accommodation establishments on the database across the whole of the South West region.

Table 4.1 shows a breakdown of accommodation stock for the South West by county and type of establishment. Tables 4.2 and 4.3 give an indication of the accommodation capacity, in terms of serviced accommodation bedspaces, self-catering units and holiday park pitches or units.

It is widely agreed that the TRIPS database does not provide an accurate measure of the actual amount of accommodation on the ground. There are a number of reasons for this:

- New establishments are not automatically entered onto the database if they are not inspected.
- To a degree, TRIPS is reliant on receiving information about new stock from external sources for whom providing this data may not be a priority.
- Regular contact is maintained with inspected properties to update information on business changes and developments. Nevertheless, because this process is cyclical, at any one time there may be out-of-date information on a proportion of establishments.
- Non-inspected properties are sent a short questionnaire to help up-date TRIPS information but there is little incentive for them to return these forms, regardless of whether the business is operational or has ceased trading.
- There are a number of systems in place to 'clean' and update the database but given the volume of entries only a proportion of the database can be up-to-date at any one time and TRIPS may include operators that have ceased trading. These anomalies are more likely, though not exclusively, to relate to smaller serviced establishments.

TABLE 4.1 Total number of accommodation enterprises by county

	Cornwall	Devon	Dorset	Form Avon	Gloucs.	Somerset	Wiltshire	TOTAL
Hotel	430	790	327	161	173	199	139	2,219
Inn	63	132	56	17	81	101	76	526
Guesthouse	329	511	369	107	76	169	58	1,619
B&B	314	458	471	225	346	423	335	2,572
Serviced Farm	71	117	37	14	55	74	48	416
Self catering	2,895	2,793	1,232	213	429	661	187	8,410
Holiday park	247	198	116	23	29	106	26	745
Holiday centre	6	10	4	1	0	3	0	24
University and College	1	2	0	3	2	1	0	9
Youth and Group accom	19	25	15	8	9	12	1	89
TOTAL establishments	4,375	5,036	2,627	772	1,200	1,749	870	16,629

TABLE 4.2 Serviced accommodation capacity (bedspaces)

	Cornwall	Devon	Dorset	Form Avon	Gloucs.	Somerset	Wiltshire	TOTAL
Hotel	19,835	33,900	20,015	12,914	8,250	5,467	7,303	107,684
Inn	1,079	1,706	804	182	1,199	1,121	710	6,801
Guesthouse	5,249	8,610	7,267	1,635	920	1,218	603	25,502
B&B	3,158	4,391	3,740	2,633	2,375	2,368	1,987	20,652
Serviced Farm	563	864	247	109	421	501	301	3,006
TOTAL serviced BEDSPACES	29,884	49,471	32,073	17,473	13,165	10,675	10,904	163,645

TABLE 4.3 Indicative size of other types of accommodation

	Cornwall	Devon	Dorset	Form Avon	Gloucs.	Somerset	Wiltshire	TOTAL
Self catering UNITS	6,584	7,029	2,135	587	661	982	264	18,242
Holiday park STATIC UNITS	9,921	7,366	2,902	140	53	1,267	0	21,649
Holiday park TOURING PITCHES	20,082	16,696	10,073	1,345	3,483	6,463	1,443	59,585
Holiday Centre CAPACITY	10,406	8,642	5,032	580	0	12,018	0	36,678
Uni/ College BEDSPACES	88	2,952	0	3,626	1,122	180	0	7,968
Youth/Group BEDSPACES	1,144	1,277	1,414	645	538	1,640	70	6,728

Local authority monitoring and recording procedures

The level of checking of accommodation statistics and records varies considerable between local authorities. Most rely on the TRIPS data for summary statistics of their accommodation stock. A few undertake ad-hoc audits in house (sometimes motivated by Best Value requirements) or research in conjunction with locally based colleges. This checking may involve physical checking (in a very few cases) or cross-checking with other data sources such as commercial guides, Yellow Pages and the internet. None of the tourism officers we contacted had supported their research methods with telephone or face to face contact with accommodation operators within their districts. As a result, only the volume of businesses are measured and not their capacity, which cannot be determined without operator contact.

Bournemouth reality checking

One of the most robust research exercises appears to have been undertaken by Bournemouth Tourism, in association with The Market Research Group based within Bournemouth University. This research took place over a four week period and unearthed 270 establishments within five pre-defined districts. The survey was conducted on foot, with students following pre-determined routes. The on-street data was matched against published data (accommodation guide and yellow pages) and anomalies (additions or subtractions to the expected stock levels) were checked again during further on-street research work. None of the accommodation operators were contacted directly during this process. Bournemouth Tourism commented that this method worked particularly well within concentrated residential areas. It also enabled them to take into account seasonal operators that may offer rooms for rental on a non-formalised basis during the main holiday season.

Bournemouth Tourism undertook a similar methodology within the district of Purbeck, which is a rural district on the South Coast. The provision of accommodation within Purbeck is less concentrated and the “on-foot” methodology used in Bournemouth was replaced by “in-car” survey teams. Once the survey had been completed it was acknowledged that it had been valuable to physically check the local area in person. However, overall, it was felt the exercise was less successful than the Bournemouth survey because of the less densely populated guest accommodation provision.

This exercise revealed that the TRIPS database underestimated the actual amount of accommodation in both areas.

Weaknesses in accommodation records and statistics

The following problems with accommodation data and sources of information were identified in the course of our study:

- Difficulties in keeping up to date. Many accommodation establishments are very small lifestyle businesses that dip in and out of trading.
- Bias towards inspected accommodation. Local authorities acknowledge that they should have a clear understanding of all accommodation in order to monitor

standards and address supply and demand issues. However, the inclusion of graded-only accommodation within local authority accommodation guides often means that un-graded accommodation is lost/removed from best value led counting systems. This may even include large group based hotels or travel lodges.

- Occasional fudging of boundaries, for example where an urban area may be served by a hotel on the outskirts that may be in a neighbouring district. This may lead to double counting.
- Particular inconsistency in the way self-catering accommodation is counted and classified. Self catering units are variously not included, only included if they are let privately and not through agencies, or listed but with a caveat indicating not complete.
- Accommodation guides are invariably not comprehensive owing to use of paid entries or inspected only accommodation. Business directories are also found to be incomplete. In particular, properties let by self-catering agencies, or corporate branded hotels with their own marketing media, are often not listed. Our experience is supported by Bournemouth Tourism's recent research findings, which stated that between 20-30% of accommodation providers are not featured in either the main accommodation guide or Yellow Pages.
- Inconsistency in the classification of enterprises into different types, including:
 - Lack of clarity in what is meant by self-catering, static vans, holiday centres etc. Some enterprise may qualify as more than one type, leading to double counting.
 - Smaller hotel operators 'downgrading' their property to guest-house status, feeling that their market position is stronger as a 5 diamond property than a one or two star hotel.
 - No clear distinction between a B&B and a guesthouse.
 - Serviced and self catering being offered flexibly by the same enterprise, leading to double counting.

Testing the TRIPS database

An investigation of the accuracy of the TRIPS database was undertaken by us via an in-depth study of accommodation and bed-stock provision in three separate areas. The following areas were chosen because they provided a good representation of the towns, countryside and coastal locations within the South West region.

- Kerrier, on the Cornwall Peninsula - essentially a rural inland and coastal district, without major resorts.
- North Devon district, which has an established county town (Barnstaple) and a developed coastal strip from Braunton around to Lynton, which includes Ilfracombe as the main traditional seaside town.
- Cheltenham in Gloucestershire - an historic Spa town with an established, non-coastal tourism product.

The accommodation stock within each area was researched through desk based secondary research methods. Published sources such as accommodation guides and Yellow Pages were systematically checked. Substantial web-based research was also undertaken to check the data within published guides, or to source accommodation operators that only undertake web-based promotions. Direct

telephone contact was also made with operators where necessary, to check whether businesses were trading and to establish bed-space capacity where this was in doubt. Over 500 serviced accommodation providers were contacted together with a substantial number of the over 1,500 non-service providers.

From a sample of 400 of the establishments contacted, it was found that:

- 74 had ceased trading.
- 50 were not listed on the database, mostly being very small.

This reveals the propensity for TRIPS both to overestimate reality by retaining establishments that no longer exist, and to underestimate it by failing to pick up some places that exist.

Turning to the complete audit of the enterprises we found, Table 4.4 shows how this compares with TRIPS.

TABLE 4.4 TRIPS data vs Consultant Research

		Establishments	Capacity
Kerrier			
Serviced	TRIPS underestimates	by 28%	by 20%
Self-catering	TRIPS underestimates	by 34%	by 25%
N Devon			
Serviced	TRIPS overestimates	by 7%	by 24%
Self-catering	TRIPS underestimates	by 42%	by 29%
Cheltenham			
Serviced	TRIPS overestimates	by 26%	by 20%

The above table does not include holiday parks (camping, caravanning and holiday centres). Here there was also found to be significant differences between TRIPS and our survey, but as parks tend to be few in number but are very sizeable in terms of capacity, the inclusion or exclusion of just one or two parks seriously affects percentage differences and so quantification can be very misleading.

These figures need to be treated with extreme caution and the exercise revealed the dangers of over-reliance on either set of data. However the broad indications are that:

- TRIPS may underestimate self-catering. This may be due to the effect of self-catering agencies and probably is mainly felt at the very small end of the market such as one unit enterprises, so underestimation in capacity will be less than in enterprise numbers. There may also be a small effect of serviced accommodation converting to self-catering in resorts that may not be picked up (this was found in N Devon).
- TRIPS may underestimate or overestimate serviced accommodation, depending on location. In N Devon, some small lower quality hotels and guest houses had ceased trading or converted to self-catering.

Revisions made by local authorities

Towards the end of 2002, South West Tourism asked local authorities to revise the TRIPS statistics based on their local knowledge, where possible, as part of the

Cambridge economic impact model study. New figures were submitted by all counties, except Cornwall. In some cases, there were no changes made, or these were insignificant.

This exercise revealed the great difficulty that local authorities have in making such revisions.

Of all the parts of the region, the unitary authorities in former Avon appear to be keeping the closest check on accommodation establishments. Changes made for the Avon area suggested:

- TRIPS had been moderately accurate with respect to serviced accommodation, but nevertheless overestimating numbers (there are now fewer B&B and inns) but underestimating capacity (possibly owing to new or extended hotels).
- In total, self-catering had been underestimated by TRIPS, especially in terms of capacity, but this may have been particularly affected by the definition of caravan sites/holiday parks and under-counting by TRIPS in this sector, which can make a big difference to figures.

Conclusions on accommodation enumeration

This is an area fraught with difficulty. Our investigation has only really served to reveal the unreliability of existing records of known accommodation stock. It is impossible to make a comprehensive and reliable reassessment of TRIPS across the region. If it is felt important to have accurate knowledge of the total amount of accommodation in the area, outwith the inspection scheme, then a new, systematic checking programme on the ground would have to be introduced with the cooperation of DMOs and the private sector, possibly under the auspices of EnglandNet. Even this would not be fully accurate as operators change working practices at short notice and vary supply according to market need through the addition of extra beds on a short-term basis.

At the moment, TRIPS provides the only basis for forming a view of total accommodation stock. It provides no more than a partial picture, variously over and under estimating enterprise numbers and capacity across counties and by types of accommodation and location.

Taking the region as a whole, we reckon that TRIPS may underestimate serviced accommodation by between 5% and 10% (though it will overestimate it in some places) and may underestimate non-serviced accommodation by up to 20%.

Distribution of accommodation

The following main patterns emerge from the revised TRIPS database.

- Hotels and inns together account for under 40% of serviced accommodation enterprises, with 60% being B&B/guest houses. However, 70% of serviced accommodation capacity is supplied by hotels and inns. This ignores group and campus accommodation.
- There is more self-catering than serviced accommodation in the region, both in terms of number of enterprises and total bedspace capacity.

- There is far more accommodation of all types in the three counties of Devon, Cornwall and Dorset than in the other counties.
- Devon has significantly the most hotel and guest house capacity, followed by Dorset and then Cornwall. The amount of serviced accommodation in Cornwall and Dorset is fairly similar.
- Bed and breakfast establishments are more evenly spread across all seven counties, with the most in Dorset and Devon.
- Devon has twice as much farm accommodation as other counties, followed by Cornwall and then Somerset. There is relatively little farm accommodation in Dorset and Wiltshire.
- There is most touring caravan capacity in Cornwall.
- There are huge numbers of small self-catering establishments in the region with one or a handful of units, especially in Devon and Cornwall.

Inspected and quality graded accommodation

More certainty rests in the field of accommodation that is inspected and quality graded. A breakdown of this accommodation by county is provided in Table 4.5.

There is variation between sectors, particularly in the average grade awarded to inspected accommodation. Hotels have the lowest average grade (2.9), while holiday parks have the highest (3.9). Serviced farms appear to be highly engaged, with on average 82.9% of known stock having been inspected, achieving an average grade of 3.7.

Each county has strengths in different sectors:

Cornwall has above average grades for B&Bs, serviced farms and holiday parks, and has over half its inns within the inspection scheme.

Devon has above average grades for B&B and holiday parks, although it has low participation rates in the inspection scheme in a number of sectors.

Dorset has high participation rates for hotels, self-catering and holiday parks, and an above average grade for inns.

In former **Avon**, hotels are of a slightly higher average grade, but their guesthouses, serviced farms and holiday parks perform less well.

TABLE 4.5 Inspected and quality graded accommodation by county

	Cornwall	Devon	Dorset	Form Avon	Gloucs	Somerset	Wiltshire	TOTAL
Hotels	430	790	327	161	173	199	139	2219
Total inspected	227	421	202	83	103	94	65	1195
Inspected as % known stock	52.8	53.3	61.8	51.6	59.5	47.2	46.8	53.9
Average grade	2.9	2.9	2.9	3.1	2.9	2.9	3.2	2.9
Inns	63	132	56	17	81	101	76	526
Total inspected	37	35	13	7	33	37	24	186
Inspected as % known stock	58.7	26.5	23.2	41.2	40.7	36.6	31.6	35.4
Average grade	3.1	3.2	3.5	3.3	3.3	3.0	3.5	3.2
B&Bs	314	458	471	225	346	423	335	2572
Total inspected	158	173	205	114	195	193	146	1184
Inspected as % known stock	50.3	37.8	43.5	50.7	56.4	45.6	43.6	46.0
Average grade	3.7	3.7	3.6	3.6	3.7	3.6	3.5	3.6
Guest houses	329	511	369	107	76	169	58	1619
Total inspected	104	191	127	37	43	65	22	589
Inspected as % known stock	31.6	37.4	34.4	34.6	56.6	38.5	37.9	36.4
Average grade	3.5	3.5	3.4	3.4	3.7	3.6	3.5	3.5
Serviced Farms	71	117	37	14	55	74	48	416
Total inspected	59	90	30	12	48	67	39	345
Inspected as % known stock	83.1	76.9	81.1	85.7	87.3	90.5	81.3	82.9
Average grade	3.8	3.6	3.7	3.4	3.5	3.7	3.7	3.7
Self catering	2,895	2,793	1,232	213	429	661	187	8,410
Total inspected	1031	855	701	81	228	231	95	3222
Inspected as % known stock	35.6	30.6	56.9	38.0	53.1	34.9	50.8	38.3
Average grade	3.3	3.4	3.2	3.4	3.6	3.4	3.5	3.3
Holiday parks	247	198	116	23	29	106	26	745
Total inspected	112	95	72	10	10	44	9	352
Inspected as % known stock	45.3	48.0	62.1	43.5	34.5	41.5	34.6	47.2
Average grade	3.9	3.9	3.8	3.6	3.6	3.8	3.9	3.9

Gloucestershire performs well across the board, with particular quality strengths in the B&B, guest house and self-catering sectors: by contrast, its holiday parks perform less well.

Somerset has no sectors that are either particularly strong or particularly weak.

Wiltshire has strengths in the average quality grade of its hotels, inns and holiday parks, although its B&Bs perform slightly less well than other areas.

4.2 Visitor attractions and activities

We estimate that there are just over 1,000 attractions in the South West region. Table 4.6 presents these attractions within 13 categories and shows how they are dispersed across the region.

We have cross-referenced the list of attractions on both databases with the British Tourist Authority's Visit Britain website and have made other minor adjustments as appropriate and based on our knowledge of the regional attraction product. We also note that The Heart of England Tourist Board TRIPS for Gloucestershire included a number of entries that are either not usually categorised as visitor attractions e.g. town centre locations, or which provide an illustrative list of supply only (principally relating to pubs and restaurants). These entries have been excluded for consistency with the other Counties. Notwithstanding, the table of attractions overleaf is not considered to be definitive.

Attraction Categories

The South West tourism attraction product is strongly heritage-led. Museums/galleries comprise the largest category, accounting for 25% of attractions, followed by historic houses/castles (16% of all attractions) and other historic/archaeological sites (12%).

TABLE 4.6 Tourist attractions in the South West Region

	Devon	Cornwall	Glos.	Somerset	Wiltshire	Dorset	Avon	Total
Museums/art galleries	53	38	37	31	25	35	23	242
Historic houses/castles	47	24	27	17	16	27	5	163
Other historic/archaeological sites	12	30	17	14	19	11	8	111
Gardens	20	43	10	10	11	15	5	114
Workplaces	24	13	13	18	0	13	3	83
Wildlife attractions/zoos	18	13	6	10	0	10	2	60
Natural heritage visitor attractions	14	5	8	4	5	3	5	44
Visitor/heritage centres	11	7	9	7	2	3	5	45
Farms	13	5	9	5	3	4	1	40
Places of worship	8	2	7	4	3	5	6	35
Leisure/theme parks and attractions	8	10	3	4	1	5	2	33
Steam/heritage railways	8	5	6	3	1	1	0	24
Boat trip	7	2	0	1	1	0	2	13
Total	243	171	152	128	87	132	67	1006

Source: TRIPS databases (South West Tourism, Heart of England of Tourist Board) + revisions.

We note that TRIPS database does not list commercial art galleries. The TRIPS list of 21 galleries for the whole of the South West (not including Gloucestershire) under-represents the significance of the broader gallery sector within some areas. For example, The Tate, St Ives, has contributed to a growing trend for commercial art galleries in the immediate area. Many galleries may not have been listed due to their dual role as both a visitor attraction and a retail outlet.

The South West has a number of destination attractions with international/national status including Stonehenge, The Eden Project and Roman Bath and The Pump Rooms in Bath. In addition, there are several significant 'industry at work' and adventure parks that attract significant numbers of visitors and are important day visitor destination attractions for people on holiday in the area and for coach trips.

In looking at total supply, it is interesting to note that, while the South West is strongly associated with gardens, overall the number of garden attractions is not high. Rather it is the strong reputation of a number of establishments and their concentration within particular parts of the region, principally Cornwall and Devon, that has built up this association.

The region has a large number of family based attractions accounting for about 16-18% of supply and reflecting the continuing importance of parts of the region as main family holiday destinations.

Distribution of Attractions

There is a particularly high concentration of museums and heritage attractions in the north of the region, notably in Bristol and Bath.

Garden attractions are a strong feature in Devon and Cornwall. Together these two counties contain 47% of all garden based visitor attractions in the South West region including high profile attractions such as The Eden Project, The Lost Gardens of Heligan, Trebah Garden Trust and Tregrehan.

Devon has the largest number of attractions in the South West region, with a total of 243 attractions (26% of South West attraction supply). It is also well off in terms of the distribution of types of attraction, accounting for around 30% of the region's farm attractions, steam/heritage railways, natural heritage attractions, historic houses/castles, workplaces and wildlife attractions/zoos.

Cornwall has the highest concentration of historic/archaeological sites, accounting for 32% of the total number in the South West region. Cornwall also contains the highest number of leisure/theme parks, accounting for a third of the region's total.

Activity tourism sector

Activity-based tourism enterprises include operators providing single activities (such as riding) or multiple activities (such as water or adventure sports), service providers such as cycle hire companies, and tour operators packaging different recreational activities such as walking. There are also many specialist retailers throughout the region supplying the activity tourism market, both marine and land based.

There is no definitive list of activity tourism enterprises. Enumeration is difficult. Some evidence is provided by:

- The inclusion of activity providers on the Gloucestershire Tourism database. This lists a total of 248, thereby demonstrating the significance of this sector.
- South West Tourism's SWH₂O campaign, in which 1,148 marine leisure businesses and suppliers (including watersports facilities such as chandlers) are currently taking part.
- Our own enumeration of walking tour operators/package suppliers in the region, based on an analysis of publicity material – we found 28.

Some activity providers may also appear in other tourism operator categories, for example where a farm diversification initiative might include farm accommodation and also promote and organise walking holidays. Therefore, some operators may also appear in accommodation or attraction listings. Furthermore, we suspect that many activity suppliers may not be part of formal local tourism associations and networks and may not be recorded within existing tourism operator lists.

4.3 Retail and Food & Drink

Retail outlets provide an extremely important tourism resource and, in turn, tourists and day visitors from home can provide the majority of the market, or at least a vital component of it, for many shops, especially in more popular tourist destinations. Therefore the retail and tourism sectors are mutually interdependent. However, as individual retail outlets depend to a lesser or greater degree on tourist spend, depending on location and product, it is not possible to quantify the number of retail outlets involved with tourism in the South West.

Tourists and day visitors may make dedicated leisure shopping trips (predominantly day visits) or combine shopping with other activities on a holiday or short break. Retail purchases can span a broad range of goods including souvenirs, gifts and luxury items and clothes.

Food and drink is also an integral part of the tourist experience and is often closely interwoven with the shopping trip experience. A report published in 2001 for MAFF (now DEFRA) found that between 61-69% of holiday makers and visitors felt that food in general made a positive contribution to their holiday, while 39% said that it contributed 'a lot'. Between 32% and 66% of tourists purchase or eat local foods during their visit. The most popular venues for eating out are: pubs (64%), tea-rooms (43%), café and snack bars (32%) and fish and chip shops (31%). However, whether a particular eating establishment is classified as predominantly a tourism or a local business varies widely according to location, opening hours, product and marketing.

The importance of these activities is confirmed by national statistics on visitor spending. In 2001, 22% of domestic visitor spending was on eating out and 15% on shopping; the equivalent percentages for overseas visitors were 27% and 21% respectively. Around half the expenditure on shopping was on clothes.

Examples of retailing enterprises with a strong tourism interdependency include:

- Village stores and garages in popular rural destinations and coastal areas, which will often depend on the additional income brought by tourists for their survival.
- Specialist arts, crafts and souvenir shops in resorts and heritage towns which form a key part of the visitor appeal and will be mainly dependent on tourists and leisure day visitors.

- Visitor attractions developed in whole or in part around retail. This may include factory shops and outlets, such as Dartington Crystal.
- Major shopping complexes which act as a draw for day visitors in their own right (such as Clarks Village, Street and Cribbs Causway, near Bristol).

Case studies of the retail and tourism relationship

Bath is a major shopping destination as well as a world famous heritage city. Around 40% of the retail outlets are specialist independent shops, many of which are unique to the city. Bath's historic core contains thousands of small listed buildings that cannot be altered or enlarged. 43% are less than 1,000 sq. ft. and therefore do not have enough floor space to attract the multiples. This creates a distinctive shopping experience that is an attraction in its own right and adds value to heritage trips.

The three main retail markets are local shoppers, regional day shoppers and tourists. The most successful retail operations are those that can cater to all these markets. Shire's Yard is an example of an independently run small specialist shopping centre in the more affluent northern quarter of Bath. Opened since 1989, it comprises 20 individual stores selling designer clothes, accessories and homeware, as well as two cafes, attracting 100,000 visitors a week during the summer. It predominantly attracts the affluent AB socio-economic groups. For example, "Blue", a designer store in the centre, report that the majority of their trade comes from visitors making special shopping trips to Bath three or four times a year from as far as Wales and Chester, sometimes spending as much as £2,000-£3,000 in one trip.

Bath has a population of 87,000. In 1999 Bath and NE Somerset received 937,000 staying visitors and 2.8 million day visitors with a combined expenditure of £195 million. This divided into: Retail sector £55.4 million; Catering industry £53.6 million; Accommodation sector £43.4 million; Transport industry £24.7 million; Attractions and entertainment sector £17.9 million. The highest level of spending was in the retail sector, closely followed by the catering industry.

Dartington Crystal in Torrington was set up in 1967 by the Dartington Hall Trust to try to counter the depopulation that was occurring in rural North Devon at that time. Employment has grown from 35 to 250. The current visitor centre, built in 1987, includes exhibitions, working demonstrations by craftsmen and a family activity centre. Dartington Crystal is now one of the West Country's leading visitor attractions and there are plans for further development. Of the estimated 250,000 visitors, approximately 75% of visitors are staying in the area on holiday. One third of visitors give their reason for visiting Dartington Crystal as to visit the shop or to get a bargain, compared to only 23% who came to go on the factory tour.

The glass shop is extensive and stocks a wide selection of first quality crystal and slightly imperfect pieces at reduced prices. It is considered to be the largest glass shop in the country. The complex also contains a giftware shop, which hosts a variety of leading brand names. Retail turnover in the last financial year amounted to £1.8 million, with an average spend of £22 per visitor in 2002.

4.4 Standard Industrial Classifications

Visit Britain and the Department for Culture, Media and Sport define the industry in terms of a number of Standard Industrial Classifications (SIC) which are used in national labour market studies undertaken by bodies such as the Office of National Statistics (ONS). These SIC's group businesses into types at various levels of aggregation. The most detailed classification is called Sub-Class (which consists of up to 6 digits) whilst the most aggregated classification is by industry (defined by a letter). The SIC definitions used by the organisations mentioned above are defined at Group level (3 digits).

One of the main disadvantages of using 3 digit classifications is that they define industries at a very broad level and are therefore likely to include enterprises that are not engaged in the tourism sector. For instance museums, which one could argue are clearly constituents of the tourism industry, are included in a broader category that also includes libraries and archives. In the main, these latter two are likely to serve a resident population rather than visitors.

In order to gain an increased level of detail and overcome some of the problems detailed above, a specially selected range of 4 digit SIC's have been used in this study. Descriptions of the classifications are contained in the following tables.

TABLE 4.7 Employee Numbers in the Tourism Industry in South West

SIC Class	Description	Employee Numbers				% change (98-01)
		1998	1999	2000	2001	
5511	Hotels and motels, with restaurant	36,505	34,923	35,406	36,863	1%
5512	Hotels and motels, without restaurant	644	621	665	556	-14%
5521	Youth hostels and mountain refuges	170	215	218	123	-28%
5522	Camping sites, including caravan sites	2,090	1,802	1,908	2,327	11%
5523	Other provision of lodgings	8,136	6,332	6,520	7,718	-5%
5530	Restaurants	38,993	36,169	37,183	41,125	5%
5540	Bars	45,525	46,048	47,940	50,560	11%
6220	Non-scheduled air transport	1,208	1,133	1,212	569	-53%
6330	Activities of travel agencies etc	6,434	5,623	8,363	7,371	15%
	Total of above	139,705	132,866	139,415	147,212	5%

Source: Annual Business Inquiry (ABI) 1998 – 2001

Note: ABI does not include self-employed data

As can be seen from the table above, the measures of employment used here suggest that it has risen by 5% from 1998.

The largest employers in the sector are *Bars, Restaurants and Hotels with Restaurants*.

The sectors showing the largest growth in terms of employment are *Activities of Travel Agencies* (15%), *Bars* (11%) and *Camping Sites including Caravan Sites* (11%). The sectors showing the largest decrease are *Non-Scheduled Air Transport* (-53%), *Youth Hostels and Mountain Refuges* (-28%) and *Hotels and Motels, without Restaurant* (-14%).

TABLE 4.8 Tourism Enterprise Numbers in the Tourism Industry in South West

SIC Class	Description	Number of enterprise groups*		% change
		1999	2000	
5511	Hotels and motels, with restaurant	1,854	1,769	-5%
5512	Hotels and motels, without restaurant	78	87	12%
5521	Youth hostels and mountain refuges	17	17	0%
5522	Camping sites, including caravan sites	252	253	0%
5523	Other provision of lodgings	584	601	3%
5530	Restaurants	4,376	4,529	3%
5540	Bars	4,802	4,869	1%
6220	Non-scheduled air transport	45	46	2%
6330	Activities of travel agencies etc	469	478	2%
	Total of above	12,477	12,649	1%

* enterprise group refers to one or more enterprise sites under common ownership.

Enterprise figures are not available earlier than 1999 owing to what ONS describe as methodological problems.

It is interesting to note that the number of hotels went down between 1999 and 2000 and the number of restaurants went up.