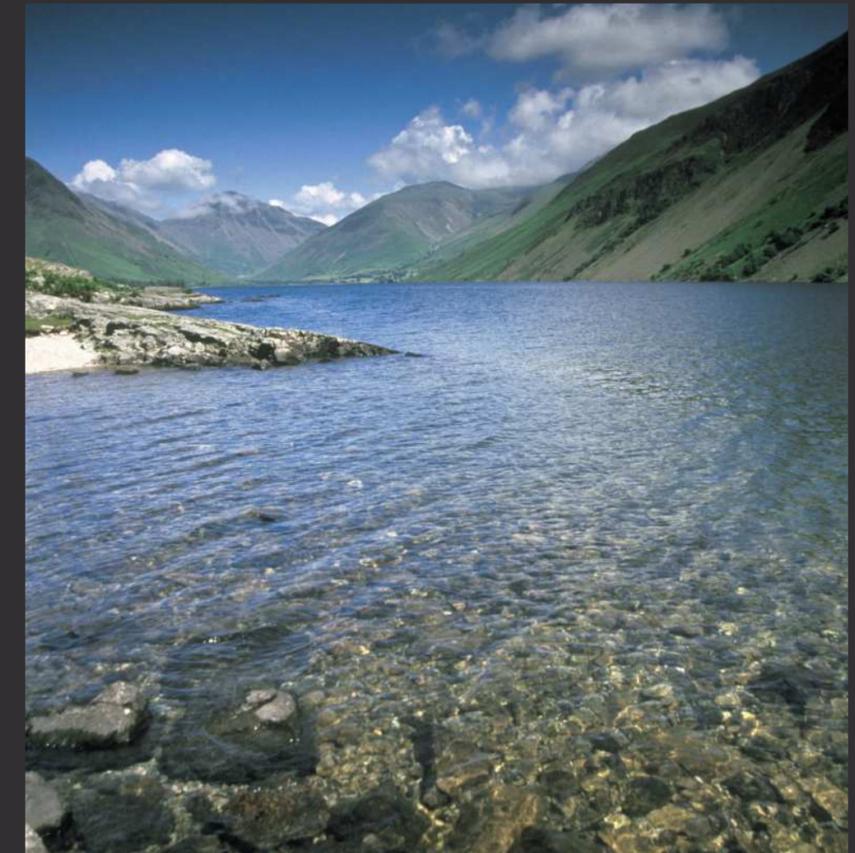


Cumbria Tourism
At the heart of our visitor economy

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Produced in partnership by Cumbria Tourism.



MAKING THE DREAM A REALITY

THE TOURISM STRATEGY FOR CUMBRIA
2008 – 2018

Cover Image
Wastwater

I discern that the lake country
is a glorious region, of which I
had only seen the similitude in
dreams, waking or sleeping.

Elizabeth Gaskell (1810 - 1865)

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05. ACTION 06. HOW ARE WE GOING TO MEASURE WHAT WE DO 07. SUMMARY OF CUMBRIA TOURISM STATISTICS



01.

tourism in cumbria



Left
Rydal Water from
open top bus

Right
Ullswater



The Lake District in Cumbria is one of Britain's few truly world-class destinations. The beauty of its landscape has attracted visitors since tourism began, ensuring the Lake District has a place in the hearts of the British people. But things change. Destinations all over Europe are easily and cheaply reached on low cost flights and rapid trains, while far flung places have become regular holiday haunts. Meanwhile in the UK, the renaissance of our cities has seen a huge growth in the popularity of city breaks, and rural destinations from North Wales to the Peak District are promoting themselves as the ideal get-away. Of course Cumbria is much more than The Lake District National Park, and clearly much of the County's tourism development potential lies beyond the Park's boundary offering significant economic opportunities for many areas.

So while of course Cumbria still draws large numbers of visitors who make a huge contribution to our economy, spending over a £1 billion each year, it is true to say that we have not enjoyed the growth that some other areas have seen over the last few years. And yet Cumbria is far more dependent on tourism than most other parts of the UK so we can ill afford to be complacent.

Cumbria attracts both visitors and those who want to settle here and run businesses. Our environment, our culture and our way of life are fundamental to the success of tourism and the well-being of the people who live here. That is why we need a tourism strategy. A strategy that will guide the development of tourism both for our economic success but which will also be in sympathy with what makes Cumbria special.

This document looks at the big picture outlining what we want for tourism in Cumbria and how we can realise that over the next decade. The detailed analysis and rationale with all the relevant data can be found in an issues paper titled 'A Realistic Dream' on Cumbria Tourism's website www.cumbriatourism.org/StrategyIssuesPaper. There you can also find the actions to achieve our ambitions, which are in the Destination Management Plan produced each year pinning down who is doing what.

So first – let's think about where we want to get to...

the vision

In 2018 Cumbria, as well as being known for world-class landscapes, will have an unrivalled reputation for outdoor adventure, heritage and culture with a year-round programme of events. Our accommodation, our food, our public realm and our customer service will reinforce our reputation as the number one rural destination in the UK.

Achieving this will require a concerted effort by everyone involved with tourism from both public and private sectors, working individually and in partnership. It will also require a focus on priorities which will mean we can't do everything we might like to. This means doing a few things exceptionally well rather than dabbling in lots of things.



Left
Walking through
Hawkshead

Right
WOW Festival
Bowness On Windermere

02. Fitting into the bigger picture

02.

fitting into the bigger picture



Public sector support for tourism comes from the E.U., Northwest Regional Development Agency and Local Authorities and is delivered by Cumbria Tourism, the Tourist Board for Cumbria. The Northwest Regional Development Agency has produced a strategy for the entire region which sets out investment priorities for tourism development.

The aims in the regional strategy are about making improvements in marketing, business performance, quality, skills, infrastructure and sustainability:

- Enhanced communication with visitors
- Higher levels of productivity and performance from businesses operating in the visitor economy
- Improved products and higher quality visitor experiences for all visitors to the region
- For the people who work in the visitor economy to have and to be using an improved level of skill
- Improved infrastructure for the visitor economy
- For all activity related to tourism and the visitor economy to be based on the principles of sustainable development

These, together with the Government's 2012 Tourism Strategy and Cumbria's Community Strategy, provide a useful checklist for us to assess our priorities and actions against.

Fitting into the bigger picture

03.

what tourism does



It is worth thinking about what we in Cumbria want from tourism. Here are some reflections to help guide us.

While we are happy to share our wonderful place with visitors there needs to be a benefit for the people who live here.

We want tourism to help sustain our communities, our environment and our way of life.

We want the prosperity, successful businesses and jobs that result from visitor spend; we want a variety of job opportunities to satisfy the demand for temporary, part time and full time employment.

We need more visitors in places outside the main tourism centres – especially along the coastal areas of south and west Cumbria and in the north of the county.

We need visitors to spend more, both in the main visitor centres in the Lake District, and in emerging destinations.

We welcome the facilities and infrastructure that visitors use, because as residents we want to use them too. But we want development to be well managed so that our environment and the character of our towns and villages is conserved and improved.

We understand that visitors want access to our landscape and that this needs to be made available sympathetically, in the right places and in the right way.

We want better public transport which encourages more visitors to leave their cars when travelling to and around Cumbria, helping to reduce negative impacts on the environment.

The Lake District is an inspiring area of fells and lakes. We can use the positive perceptions resulting from tourism promotion of the Lake District to enhance the image of Cumbria as a place to invest, work or study.

Tourism in Cumbria is based on small locally-owned businesses. As long as these businesses provide the highest service and quality standards then this is a real asset and something for us to value, because it means we have a unique offer reflecting who we are. Our accommodation, our local food, our crafts, our events can all provide the authentic experience which visitors are increasingly seeking.

Left
Shoreline, St Bees, West Cumbria

Right
Maryport Harbour Development,
West Cumbria





Left
Anns Hill, Cockermouth

Left to Right
Spoon Hall Riding Centre, Coniston
Festival of Fools, Muncaster Castle

04. Priorities

04.

priorities



There are lots of things we could be doing to achieve our vision of a successful tourism sector, but we can't do everything. How do we choose the priorities? Taking a lead from the vision suggests where we should focus our efforts:

landscape - the core

Firstly, we need to develop the tourism industry in ways which do not detract from Cumbria's special landscapes.

outdoor adventure, heritage and culture, food & drink and events - the visitor experiences.

Secondly, we need to develop those experiences that sit well in our landscape and will attract visitors to Cumbria and give them opportunities to spend money.

accommodation, public realm and customer service - the basics

Thirdly, we need to invest in those parts of the visitor experience that (while they are not the main reasons for people to come here) will, if we do them well, make sure our visitors have a great time. And vitally we need to make sure that people are able to get to, and around, the county easily by road, rail and air.

marketing - the means to an end

Fourthly, we need distinctive marketing, to re-establish Cumbria's leading tourism brands as appealing, modern destinations. We need to focus on the right people with a strong offer and persuade them to come here – for the first time or time and again – never forgetting they could so easily choose somewhere else.

And of course quality and sustainability must underpin everything we do.

05.

action



THE CORE

natural landscapes

To make the best of our natural environment we need good orientation and information for visitors such as way-marking, walking routes, cycling routes and signage. We need visitor interpretation in appropriate places, and designated and well-designed spots to view the scenery and wildlife. We need information for visitors in print and online which tells them how to make the best of our landscape – where to go and what to see. And will lead them all over the county – to the coastline, to the Roman frontier and generally off the beaten track – and not just to the lakes and mountains we are deservedly famous for. This can also help our farming community to sustain the landscape through sympathetic diversification.

built landscapes

In many ways, our built environment is as important as our natural one in meeting the needs and expectations of our visitors. Development in our towns and villages deserves to be of the highest standard embracing top quality design which is in sympathy with the best of what has gone before. And we need to keep local materials and features which will give distinctiveness in an increasingly bland world. This will also help support local businesses and skills and be of benefit to the people who live here as much as those who visit.

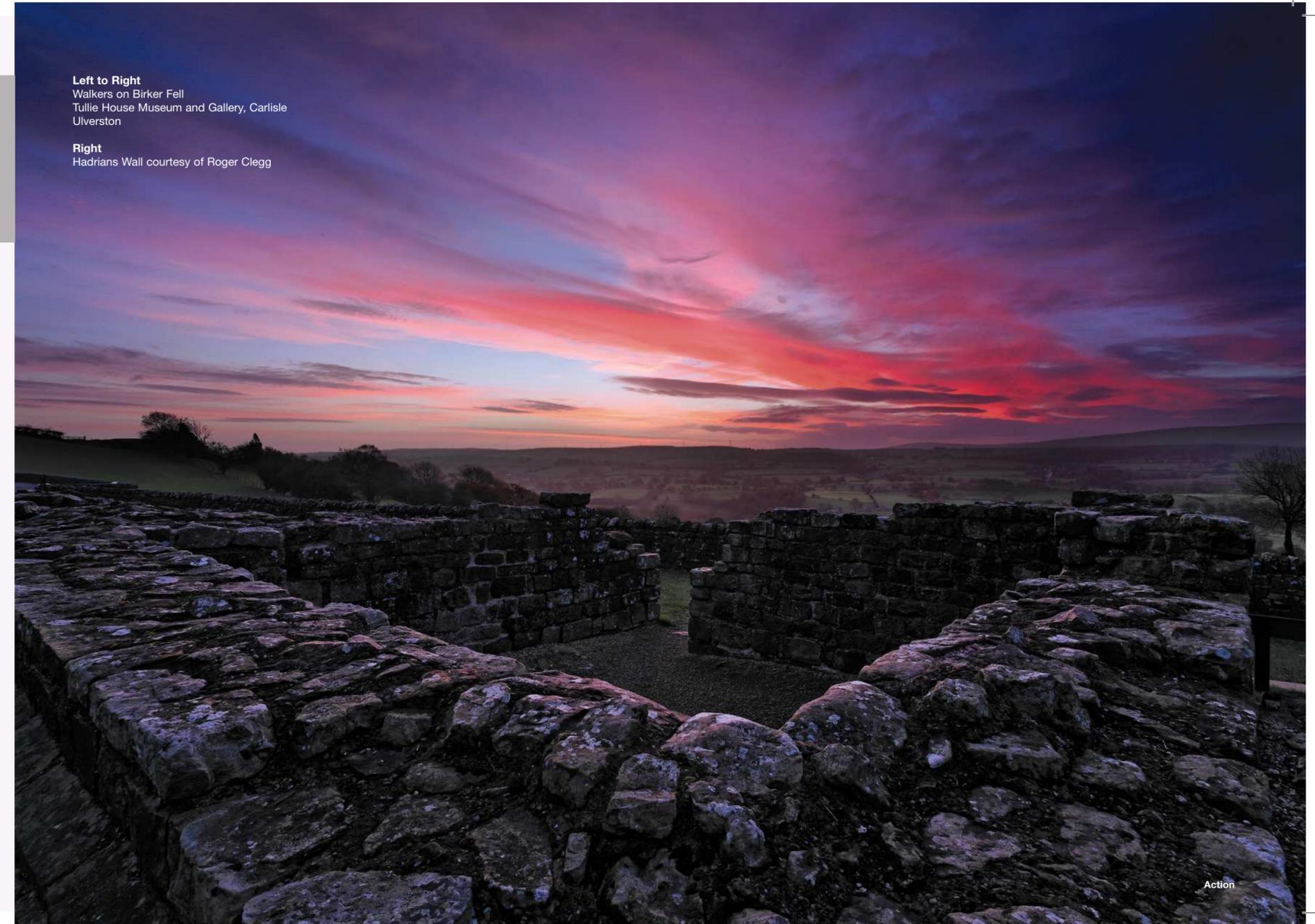
key project Using new web and mobile technology to provide visitor information for increasingly wireless consumers.

key project Exploiting the heritage of Carlisle's Historic Quarter and its connections with Hadrian's Wall World Heritage Site to attract new investment and visitors to the city.

05. Action

Left to Right
Walkers on Birker Fell
Tullie House Museum and Gallery, Carlisle
Ulverston

Right
Hadrians Wall courtesy of Roger Clegg



Action



Left
Art installation, FRED 2006

Left to Right
Mountain biking on Helvellyn
Lowther Castle and Gardens
Chef at the Waterhead Hotel, Ambleside
WOW 2008 Fireworks, Windermere



THE VISITOR EXPERIENCES

outdoor adventure

Our environment lends itself to meeting the growing demand for outdoor activities and adventure. To achieve our ambition of Cumbria as 'Adventure Capital of the UK' we need to invest in introductory level facilities, venues for national and international competitions and we also need to provide hassle-free booking of 'outdoor experiences' on line.

There is also the opportunity to develop new locations such as West Cumbria and Furness for adventure sports like kite surfing, power boating and sailing to attract new markets. We shouldn't forget our more traditional adventure activities like cycling, high level and long distance walking and rock climbing.

key project A growing network of off-road trails in forest locations like Whinlatter and Grizedale will attract new 'adrenalin seeking' visitors.

heritage and culture

From the western extremes of Hadrian's Wall to the world's first commercial nuclear power station; from Dark Age kingdoms to Viking settlers and the centuries of lawlessness that made Carlisle and the Borderlands the last part of Britain to be pacified; from the genius of the Romantic poets to the birthplace of climbing; from Beatrix Potter to a world famous Sticky Toffee Pudding, Cumbria has an abundance of stories to tell. We need to get better at telling them in ways that are relevant for modern audiences.

We also have a contemporary side – our living artists and craftspeople should be given opportunities to present their work to visitors and residents alike.

key project Attractions such as Lowther Castle and Gardens will restore parts of this historic estate and offer exciting new visitor experiences outside the National Park.

taste district

Eating and drinking are an essential part of a good holiday. Cumbria has a strong tradition of excellent local produce giving us plenty of scope to build our reputation for good food, and increase our visitors' enjoyment as well as increasing their spend.

This will also help to support Cumbria's farming industry and maintain the stunning landscapes.

Cumbria's growing 'foodie' reputation needs to be endorsed with Michelin stars and similar awards to stay ahead of the competition.

key project Promoting fabulous dining, pubs and cafés together with local produce and farmers markets.

events

Events and festivals are important triggers encouraging visitors to come now rather than postponing their trip to another day. Events and festivals also provide a showcase for our heritage and culture, as well as simply providing visitors with things to see and do during their visit. We need to build on our successful events like the Lowther Horse Trials, Kendal Mountain Film Festival, Words on the Water literary festival, the Lake District Summer Music Festival and the Blues Festival at Maryport to provide a first-class events programme all year round.

key project New and expanding outdoor events will combine to provide a season of adventurous, contemporary and stylish entertainment and give the destination a more dynamic identity.



Left to Right
 Gilpin Lodge, Windermere
 Windermere Lake Cruises
 Bowness TIC
 Coniston and The Lazy Fish,
 ('Wilderness Refined' image)

Right
 Camping alongside Ullswater



THE BASICS

accommodation

Cumbria has around 5000 accommodation businesses. Only about half of these are independently graded for quality despite evidence showing that quality graded accommodation performs much better in terms of occupancy and profitability than non-graded. Visitors like to know what to expect – and they are increasingly choosing on quality. Our best is exceptional but we need to increase investment and have more places aspiring to the best if we are not to disappoint.

We do also need to broaden our base – more 4 star or even a 5 star hotel would help. And we need leisure facilities to match. Development areas like West Cumbria and Carlisle would benefit from hotels with golf and other recreational facilities.

key project Tourism Connect; a grant scheme to raise the quality, productivity, environmental performance and interior design standards in Cumbria; future phases are planned to raise accommodation standards across the county.

public realm & transport

The quality of our public realm – our streets, our public buildings, our parks, our car parks, our public toilets – should all reflect and live up to the quality of our natural environment. These things might not make someone visit Cumbria but they will surely detract from the experience and reflect badly on us if they are not up to scratch. Public realm is as important to residents as it is to visitors (probably more so) and we need to get it right.

Taking another perspective, waste recycling and good environmental practices are not only the right thing to do, but fit with what visitors expect from a destination promoting its environment, nature and landscapes.

And of course transport planning and traffic management, from car park ticketing to new rail routes, is a fundamental requirement of getting the infrastructure right for visitors.

key project Proposals for Waterhead, Ambleside will reduce the impact of traffic and raise the quality of public space in the heart of the Lake District National Park.

customer service & visitor information

Successful businesses need good well-trained staff. So do happy visitors. If the 21,000 jobs in tourism are to be secure and worthwhile – giving satisfaction to those doing them and those on the receiving end – then a fundamental requirement is training in customer service.

We also need to keep a strong network of information centres in Cumbria. Despite the growth of web information and booking arrangements visitors still want face-to-face contact and advice about what to do and where to go. For those more reliant on mobile phones and Blackberrys we need to invest in new technologies which can provide information 'on the move'.

key project Through 'Welcome to Excellence' customer service training, people working in the tourism industry will develop their skills, enhance the visitor's stay and encourage repeat visits.

THE MEANS TO AN END

marketing

To get more of the right people here we need to show them what we have. The Lake District is Cumbria's strongest brand – it is well known and appealing throughout the UK and beyond. And importantly it is not, in the minds of visitors, confined to the National Park area.

We need to build a strong Lake District brand through innovative marketing to attract new visitors to Cumbria as a whole. Other destinations will be promoted specifically through the 'Sense of Place' programme. Hadrian's Wall and Carlisle in particular, are developing as destinations with considerable potential. And there are opportunities to promote individual places through thematic marketing using culture, heritage, activity and food and drink.

Effective marketing for tourism will also have spin-off benefits for other sectors by building a positive image of Cumbria.

key project A new growth marketing strategy will attract new visitors and reposition the destination by promoting two sides to the visitor story – Wilderness Refined – wonderful landscape but also quality visitor experiences.

06.

how are we going to measure what we do?



It is not easy to measure everything that we need to do but if we can we should. Here are a few of our top line targets that we are going to work hard to achieve by 2018:

- Increase visitor spend from £1.1 billion to £1.5 billion
- Increase the volume of trips from 15.2 million to 17 million (with the majority of this growth coming to areas outside the Lake District National Park area)
- Increase the proportion of accommodation providers with a quality grading from 53% to 80%
- The Lake District is identified as the number one rural destination for a holiday or short break by the UK population

While the strategy needs to be supported and delivered by all those involved in tourism, directly or indirectly, Cumbria Tourism will lead its implementation and will monitor and publish frequent progress reports.

For further information, please contact the Development Director at Cumbria Tourism.

POTENTIAL MAJOR VISITOR ECONOMY DEVELOPMENT PROJECTS IN CUMBRIA 2008 – 2018



07.1

summary of cumbria tourism statistics

Left to Right
Window Shopping, Kendal
Sculpture Trail, Grizedale Forest
Steam Train, Lakeside Station



Source
STEAM 2007

| 2007 | | Allerdale | Barrow | Carlisle | Copeland | Eden | South Lakeland | Cumbria |
|----------------------------|--------------------------|-----------|--------|----------|----------|--------|----------------|---------|
| Tourist Numbers (000's) | Total | 2,574 | 1,908 | 2,351 | 1,843 | 1,908 | 4,799 | 15,382 |
| | | | | | | | | |
| Tourist Days (000's) | Total | 5,484 | 2,296 | 3,152 | 2,975 | 4,095 | 10,195 | 28,197 |
| | In visitor accommodation | 3,589 | 278 | 930 | 1,287 | 2,731 | 7,123 | 15,937 |
| | At friends or relatives | 350 | 331 | 385 | 259 | 192 | 385 | 1,902 |
| | Day visitors | 1,545 | 1,688 | 1,837 | 1,429 | 1,173 | 2,686 | 10,358 |
| Expenditure (£'s millions) | Total | 209.27 | 60.44 | 120.28 | 94.68 | 149.59 | 510.12 | 1144.37 |
| | Direct | 157.29 | 45.6 | 90.9 | 70.78 | 112.19 | 386.54 | 863.31 |
| | Indirect | 51.97 | 14.83 | 29.38 | 23.91 | 37.4 | 132.58 | 281.02 |
| Employment (FTE's) | Total | 4,167 | 1,090 | 2,197 | 1,657 | 2,986 | 8,843 | 20,940 |
| | Direct | 3,454 | 887 | 1,794 | 1,328 | 2,472 | 7,146 | 17,080 |
| | Indirect | 714 | 204 | 403 | 328 | 514 | 1,697 | 3,860 |

Expenditure per person per day. Source Cumbria Visitor Survey 2006

Attractions. Source Cumbria Tourism's Visitor Attractions Monitor – Top 20 Visitor Attractions 2007 (excludes non-participating attractions)

Source
STEAM 2007

| Expenditure Per Person Per Day (pppd) | | |
|---------------------------------------|--------------|------------------|
| | Day Visitors | Staying Visitors |
| Accommodation (estimated cost pppd) | – | 25.53 |
| Travel in and around the area today | 5.78 | 3.74 |
| Food and Drink | 6.55 | 7.90 |
| Attractions | 2.57 | 1.93 |
| Other Leisure and Recreation | 0.63 | 0.53 |
| Shopping for daily needs | 1.55 | 1.06 |
| Shopping, gifts and souvenirs | 3.00 | 2.56 |
| Other expenses | 0.82 | 0.83 |
| Total | 18.78 | 41.01 |

| Total Expenditure | £1144.4 (m) |
|----------------------|-------------|
| Category of Spending | % |
| Accommodation | 26 |
| Food and Drink | 16 |
| Recreation | 5 |
| Shopping | 8 |
| Transport | 10 |
| Indirect Expenditure | 25 |
| VAT | 11 |
| Total | 100 |

| Attraction | Visitor Numbers 2007 |
|---|----------------------|
| Windermere Lake Cruises | 1,274,976 |
| Rheged | 465,452 |
| Tuille House Museum and Art Gallery | 279,889 |
| South Lakes Wild Animal Park | 252,631 |
| Grizedale Forest Park and Visitor Centre | 231,500 |
| Aquarium of the Lakes | 229,342 |
| Ullswater Steamers | 187,469 |
| Whinlatter Forest Park and Visitor Center | 187,269 |
| Carlisle Cathedral | 152,138 |
| Theatre by the Lake | 108,598 |
| Lake District Visitor Centre – Brockhole | 108,530 |
| Cumberland Pencil Museum | 85,000 |
| The Dock Museum | 70,563 |
| Wetheriggs Country Pottery | 65,000 |
| Dove Cottage and the Wordsworth Museum | 61,870 |
| Northern Lights Gallery | 60,000 |
| The Teapottery | 56,350 |
| Carlisle Castle | 53,407 |
| The Homes of Football | 53,000 |
| Lake District Coast Aquarium Maryport | 46,972 |

07.2

accommodation stock



Left to Right
Waterhead
Rydal Mount
Lazy Fish, Cockermouth



Source Cumbria Tourism's Accommodation Occupancy Surveys (Serviced, Self Catering, and Caravan and Camping (Touring))
*Based on the seven months between April and October

| Accommodation Type | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | 2007 Average |
|---|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|--------------|
| Serviced (bedspace occupancy %) | 25 | 37 | 40 | 50 | 54 | 56 | 59 | 67 | 64 | 56 | 40 | 37 | 49 |
| Self-catering (bedspace occupancy %) | 21 | 29 | 26 | 45 | 44 | 44 | 56 | 74 | 49 | 46 | 29 | 32 | 42 |
| Touring Caravan and Camping touring (pitch occupancy %) | 17 | 31 | 31 | 54 | 55 | 52 | 59 | 73 | 54 | 39 | 34 | 22 | 55* |

Source
Cumbria Tourism's DMS files (July 2008)

| District | Total Bedspaces | Non Serviced Accommodation | | |
|-----------------------------|-----------------|---|------------------------------|---|
| | | Houses, Cottages, Static Caravans, Chalets, Flats and Boat Moorings | Touring Caravans and Camping | Alternative (including Hostels, Camping, Barns etc) |
| | | Units | Units/Pitches | Properties |
| Allerdale | 14,609 | 1,560 | 2,145 | 22 |
| Barrow-In-Furness | 297 | 6 | 90 | 0 |
| Carlisle | 3,232 | 170 | 710 | 11 |
| Copeland | 5,370 | 503 | 995 | 11 |
| Eden | 12,206 | 787 | 2,529 | 18 |
| South Lakeland | 28,603 | 3,231 | 3,799 | 37 |
| Lake District National Park | 39,438 | 3,707 | 6,395 | 53 |
| Cumbria County | 64,317 | 6,257 | 10,268 | 99 |

Source
Cumbria Tourism's DMS files (July 2008)

| Serviced Accommodation | | | |
|-----------------------------|----------------|--------|-----------|
| District | Establishments | Rooms | Bedspaces |
| Allerdale | 370 | 2,931 | 6,546 |
| Barrow-In-Furness | 52 | 596 | 1,196 |
| Carlisle | 143 | 1,570 | 3,203 |
| Copeland | 103 | 971 | 1,938 |
| Eden | 275 | 1,885 | 3,987 |
| South Lakeland | 752 | 6,422 | 13,264 |
| Lake District National Park | 868 | 7,613 | 15,705 |
| Cumbria County | 1,695 | 14,375 | 30,134 |