

CUMBRIA DESTINATION MANAGEMENT PLAN 2014-16: SUMMARY

Introduction

Every two years Cumbria Tourism works alongside a range of partner organisations and agencies to prepare a Destination Management Plan for the county. This sets out at a strategic level the aspirations, spending programmes and key actions of all the organisations with a responsibility or interest in developing the visitor economy in Cumbria. The DMP is used to inform, shape and influence investment plans and decision makers (such as the Cumbria Local Enterprise Partnership) as well as to provide evidence for the private sector that Cumbria is clear in its ambition and worthy of new investment. The current DMP covers a two year period from April 2014 to the end of March 2016. The full plan is available at www.cumbriatourism.org This summary sets out some of the challenges and opportunities facing Cumbria's Visitor Economy over the next two years and the key 'Priorities for Action'. It builds on the Strategy for Tourism in Cumbria 2008-18 which lays down some key principles; protection of the county's special landscapes; getting the basic quality of accommodation, public realm, transport and customer service right; developing new visitor experiences and events; and marketing the destination as a modern, appealing place to visit. The next two years will be both challenging and exciting; our public sector bodies face further funding cuts and stretched resources whilst the tourism industry emerges from economic recession and is looking with more confidence to invest and raise its game. New visitor markets are emerging but global competition is increasing. This plan sets out priorities for action and investment; the county needs to work together- across its complex geography and politics - to deliver a better visitor experience. If we achieve that and promote the destination effectively, Cumbria's visitor economy will thrive.

Where are we now?

Cumbria's visitor economy is worth £2.24bn per annum (STEAM 2013: GTS UK). This figure combines spending from visitors on accommodation, food and drink, leisure and attractions and travel. Since the year 2000 this figure has increased by over 52%. In 2013 Cumbria and the Lake District received almost 40 million visitors, made up of 34.2 million day trippers and 5.4 million overnight visitors. Between them, day and staying visitors combined to produce 52m tourist days. The tourism industry provides employment for 32,805 full time equivalent (FTE) posts. As many tourism jobs are actually part time, or seasonal, the total number of people in tourism jobs is estimated at 56,410, around 19% of the county's total employment.

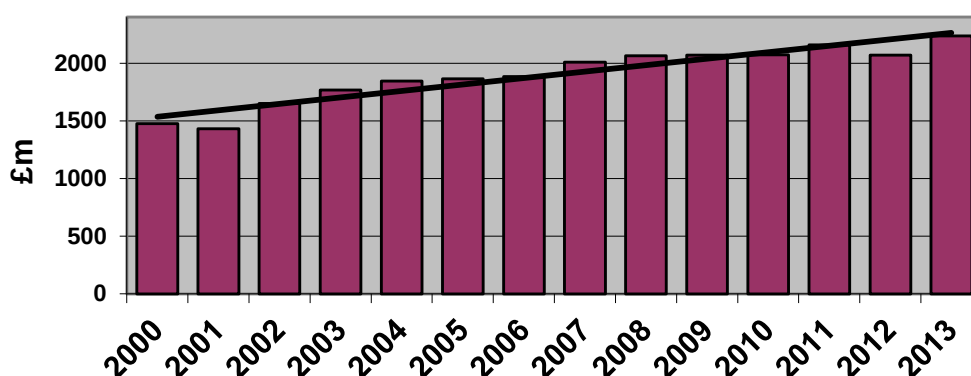
	Allerdale	Barrow	Carlisle	Copeland	Eden	South Lakeland	Lake District National Park	Cumbria
Tourism Revenue (£m)	380.2	94.3	353.6	149.1	251.8	1008.0	1051.0	2237.0
Tourist Days (m)	9.40	3.02	8.08	4.06	6.49	21.37	22.65	52.42
Tourist Numbers (m)	6.64	2.68	7.38	3.09	4.26	15.63	15.50	39.68
Employment (FTEs)	5,945	1,423	5,070	2,183	3,898	14,286	15,424	32,805

Between 2012 and 2013, Cumbria achieved an increase of 3.5% in tourist days, 4.5% in tourist numbers, and 8.0% in tourism revenue. Visitor Attractions also experienced a 7% increase in admissions. Although these increases came after a poor year (2012) blighted by a wet summer and London focussed events, Cumbria does appear to have outperformed many other parts of the UK which saw reductions in day visits and domestic overnight stays. The early indications from Cumbria Tourism's occupancy surveys in 2014 suggest that the positive trends are continuing and the industry is confident that growth will continue during the year. This confidence is being re-enforced with major investments by several of the Lake

District's leading hotel operators including Sharrow Bay, The Samling, Abbey House and The Belsfield. Alongside this new hotels are opening in Carlisle and outside Kendal and the county continues to see new investment in outdoor adventure experiences.

If the figures were not adjusted for inflation, growth in tourism revenue for Cumbria would be 51% since the year 2000, an average yearly increase of 4%.

Tourism Revenue (uadjusted)



Over the same time period of 14 years, visitor numbers and tourist days have grown by 6%. Employment supported by tourism has seen a 5% growth since the year 2000.

Trends, Challenges and Opportunities

The period of recession has re-ignited affection for UK destinations. However there remains a squeeze on disposable incomes; spending on travel and tourism is unlikely to increase dramatically in real terms, driving fiercer competition among holiday suppliers. The appeal of discounts seems to be more and more crucial as consumers go all out to locating the absolutely best deal. Consumers are better equipped to manage choice and this invites them to shop around and be more disloyal to established brands. They are investing more time in the pre-holiday buying process and they will compare prices, gather information, check consumer reviews, seek referrals, special offers and discounts. At the same time, quality at low price is changing consumer perceptions of value. Domestic competition will remain cut-throat.

In these circumstances The Lake District and Cumbria has strengths and weaknesses. Its outstanding scenic quality and reputation together with 'free' experiences (outdoors, culture and heritage, rest and relaxation) have made it a consumer favourite. At the same time it is perceived as an 'expensive' and mature destination with mixed weather and poor connections (both physical and digital!).

Given these trends and challenges Cumbria's public and private sector partners need to address a number of crucial issues over the next 2-3 years. These range from a need to cater for digital and technological advances through to investment in better transport and visitor facilities. Set against the current economic climate, the resources to address many of these issues will not be available in the immediate future and it will therefore be necessary for the various partners in the DMP to make a strong case for increased private and public sector investment both in the industry and the supporting visitor infrastructure.

A range of supporting initiatives and programmes are required to transform the visitor economy in Cumbria and contribute more fully to economic growth and regeneration in the region

- **Further improvements to accommodation and attractions** to raise standards throughout the county. This should take place with a view to attracting overseas markets – particularly given the prospects for World Heritage Site designation.
- **Marketing, image building and brand strengthening** to enable the Lake District and Cumbria to compete with high profile campaigns from rival destinations such as Scotland, Wales and Yorkshire and to capitalise on recent accolades such as the ‘Best UK Rural Break Destination’ and ‘Top UK Destination’ in the 2014 Wanderlust Travel Awards
- **Sustainable transport connections into and around the county** with a particular emphasis on West Coast Rail and public transport services around the county.
- **Investment in the public realm and access infrastructure** - targeted towards town centres and popular visitor destinations and key footpath networks.
- Enhanced co-ordination and **promotion of Cumbria’s rich arts and cultural offer and quality accredited food and drink, [via Taste]**.
- Continued **development and investment in growing outdoor activity markets** – particularly the adventure walking, water sports and cycling sectors, [via Adventure Capital].
- A targeted approach to **skills and business development** within the tourism sector.
- Rapid introduction of **superfast broadband and mobile phone /4G technology** into the county
- Raising **environmental standards and resource efficiency** within Cumbria’s visitor economy – particularly in terms of accommodation and transport services.
- More robust **support and financial underpinning of the Destination Management Organisation** from public sector bodies

Progress on many or all of these fronts will require funding support from both the public and private sector. Much of this will in future be channelled through the Cumbria Local Enterprise Partnership (LEP) and its Strategic Economic Plan together with other potential funding sources such as the Arts Council, Visit England, DEFRA and the National Lottery.

Targets and Performance Indicators

It is not always possible to measure everything that we need to do but if we can we should. Here are a few of the top line targets that we are seeking to achieve over the period of the plan:

- Increase visitor spend from £2.1bn by 2% per annum in real terms
- Increase the numbers of visitors from 38 million by 1% per annum
- Increase the number of staying visitors from 5.2million by 2% per annum
- Increase the number of tourism related jobs from 31,235 (FTEs) by 2% per annum
- Increase the number of visitor journeys made by public transport by 1% per annum
- Increase occupancy levels in serviced accommodation and self catering by 1% per annum

Future Investments and Plans - Priorities for Action

The full version of the Cumbria DMP 2012-14 includes a wide range of projects and plans for developing the visitor economy over the next 2-3 years. The following table identifies 12 large scale capital projects which we believe are most capable of a transformational impact for the county's visitor economy:

Project	Location	£m	Description/projected completion
Bowness Bay and the Glebe redevelopment and Enhancement	Bowness on Windermere	N/K	An enhancement and redevelopment programme to lift the quality of the public realm and common land around The Glebe and provide opportunities for new private sector hotel and retail investment
Brockhole Visitor and Water sports Centre	Windermere	N/K	Development of master plan proposals for development of a new visitor centre, events arena and water sports facilities
Fell Foot Country Park	Windermere/Newby Bridge	£3.2m	Development of new water sports and visitor facilities on National Trust site in the southern basin of Windermere. Master plan prepared. Seeking HLF, LEP and Sports Council funds.
Round Thirlmere Cycle Route	Thirlmere	£1.8m	Completion of round lake cycle route with safe A591 road crossings for family audience
Roman Maryport	Maryport	£6.3m	Development of Museum, Camp Farm visitor orientation and major interpretive works.
Carlisle Arts Centre	Carlisle	N/K	New Arts Centre for Carlisle to be based in Old Fire Station
Fratry Project and Visitor Centre at Carlisle Cathedral	Carlisle	£2.2m+	Opening up of the medieval Fraternity building and new visitor facilities at Carlisle Cathedral.
South Tynedale Railway	Alston Moor/North Pennines	£5.2m	Extension of steam railway into Co Durham, greening the operation, development of new Discovery Centre, upgrading stations and developing events. HLF approval of £4.2m grant support in February 2014
Windermere Steamboat Museum	Windermere	£13m	Major development of a revitalised museum and visitor facilities on the edge of Windermere. Anticipated completion and opening in 2016.
Grange over Sands Lido	Grange over Sands	£6-7m	Restoration and refurbishment of the classical lido together with visitor facilities, retail, catering and performance space
West Lakes Xtreme	Cleator Moor	£25m	Indoor Adventure Centre proposed for Cleator Moor offering Ice climbing, canyoning, indoor high ropes, caving, kids snow room and clip and climb facilities.
Wordsworth Museum and Gallery	Grasmere	N/K	Implementation of master plan proposals to extend the museum and gallery space, improve orientation and site facilities.

Whilst the list has no 'statutory' significance it should assist the Cumbria LEP and other funding agencies such as DEFRA and Heritage Lottery in the allocation of scarce resources over the next two years. DMP partners will seek to deliver as many of the schemes and campaigns set out in the long list as time and resources permit. Where additional resources are required we would recommend that the flagship schemes identified above take precedence – these are the projects which will do most to grow Cumbria's Visitor Economy and deliver the 'world class visitor experience' that is required to maintain the county's status as the UK's premier rural tourist destination.

Further Information and Enquiries

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