



**Cumbria Tourism**  
At the heart of our visitor economy

# **DESTINATION MANAGEMENT PLAN 2010/11**

## **Executive Summary**

April 2010

# 1. Tourism in Cumbria;

## Introduction

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.

## Purpose of the Destination Management Plan

The Destination Management Plan [DMP] is an action plan for the whole partnership of organisations involved in delivering the visitor experience in Cumbria [as distinct from the Business Plan of Cumbria Tourism]. It sets out at a strategic level the aspirations and key actions of all the stakeholders with a responsibility or interest in the visitor economy. It covers the three year period from April 2010 to the end of March 2013, and is refreshed annually.

It provides a framework and rationale for investment in one of the major, growing sectors of the regional economy. The 'visitor economy' embraces the total visitor experience on every step of the visitor journey. So it is not just about individual experiences and businesses – though these are critical – it is also about creating and maintaining a sense of place, delivering good service and customer care and communicating clear, appealing messages about the place and staying ahead of competing destinations.

The visitor economy has a key role to play in helping to strengthen Cumbria's economy, to support the creation of new businesses and jobs in the area, through making the area attractive to new investment and skilled workers and helping to manage economic change.

***It will require the collective efforts of both the public and private sectors and a joined up approach to deliver a successful visitor economy in Cumbria. Meeting the needs of visitors also brings wider benefits for the local community. If a place is attractive to live in and offers a good quality of life then it will be attractive to visit and invest in too.***

## The Process and Partnership

The DMP has been prepared following consultation and discussions with a wide range of stakeholders and partners across the County. In January 2010, a workshop was held with representatives from 35 partner organisations to review the plan's objectives, discuss the current and proposed activity and identify key [priority] projects and programmes to strengthen the visitor economy in Cumbria.

The wider partnership of organisations involved in supporting Cumbria's visitor economy was invited to contribute to the Plan and assist in its delivery. These include Local Authorities, Tourism Groups, visitor attractions, accommodation providers and strategic advisory bodies. The specific role and contribution of each of these organisations in raising standards and improving tourism in Cumbria is identified against each of the projects listed in the Plan.

The aim of the Destination Management Plan is to identify the specific role and contribution of each of the key delivery organisations in raising standards and improving tourism and the visitor economy in Cumbria.

## 2. The Bigger Picture; Vision & Overview

### 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.*

### Strategic framework

The DMP for 2010/11 has been developed and revised to reflect the strategic priorities for the sub-region over the next three years and to respond to current issues and opportunities. It was originally informed by the Northwest Regional Economic Strategy [RES] 2006, the North West Regional Spatial Strategy [RSS] and the Strategy for Tourism in England's Northwest [2007].

More recent guidance has been set out in the DCMS 'Sustainable Tourism in England, a Framework for Action' document, [March 2009] which sets out six key challenges that we must address, namely:

The need to:

- Minimise environmental impact and resource use
- Address the impact of tourism transport
- Improve quality and make holidays accessible to all
- Improve the quality of tourism jobs
- Maintain and enhance community prosperity and quality of life
- Reduce the seasonality of demand

Unlike the North East, where Tourism and Hospitality is identified as one of the nine key economic sectors in the RES, tourism is not currently one of the priority sectors for the North West. With the development of a new integrated Regional Strategy for the region [RS2010], there may be an opportunity to raise the profile of the industry and the contribution it makes to the wider economic health of the North West.

The regional tourism strategy Aims support the major 'drivers' of the Regional Economic Strategy and 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

A new national Tourism Strategy for England is currently in preparation and due for consultation in the near future. The draft sets out four main 'Areas for Action':

- Developing great destinations and experiences
- Ensuring quality first
- Competitive marketing
- Easy access

There is a high degree of consistency between the emerging national strategy and The Tourism Strategy for Cumbria.

***The Tourism Strategy for Cumbria 2008-18, MAKING THE DREAM A REALITY sets out how these aims will be advanced in the sub region.***

The Cumbria Climate Change Strategy [2008-2012] and the refreshed Cumbria Economic Plan, Sub-regional Action Plan [SRAP] & associated Strategy Action Plan for Tourism have a guiding role at the sub-regional level. Following the NWDA's 'It's good for business' Framework and Sustainable Tourism Action Plan model and the *Economic Implications of Climate Change legislation for Cumbria* report, the DMP seeks to embed 'sustainability' throughout the development process.

In addition, the Cumbria DMP is mindful of the statutory land use planning framework for each part of the County, together with the various management plans which have been prepared for the National Parks and Areas of Outstanding Natural Beauty.

***The DMP brings together in one place all the key actions for the visitor economy in the sub-region and, as such, is closely aligned with the Cumbria Sub Regional Action Plan for 2009-12.***

***Crucially, the Plan seeks to reflect the priorities of the four new Delivery Boards in the county:***

- ***Britain's Energy Coast, West Cumbria***
- ***Carlisle Renaissance***
- ***Barrow Regeneration***
- ***Eden and South Lakeland Delivery Board***

***[Who collectively will be key partners in co-ordinating delivery in their respective areas].***

## The need for investment in Cumbria's Visitor Economy

Tourism in Cumbria generated £1.17 billion in 2008. As such it is one of the mainstays of Cumbria's economy and a major source of employment and revenue. The benefits are increasingly shared across the county with visitors spending on accommodation, food and drink, leisure activities and shopping. Non-tourism businesses also benefit through local supply chains, such as the wholesaler who supplies restaurants and the local garage where visitors fill up with fuel. Tourism also has a crucial value to the wider community particularly in rural areas where many goods and services are only available to the resident community and viable because of the visitor spend.

In real terms the value of tourism activity in Cumbria has remained fairly flat over the period 2003-2008. In 2008, 15.3 million tourist trips were made to Cumbria comprising 5 million overnight visitors and 10.3 million day visitors. In 2000, visitors to Cumbria generated 25.7 million tourist days. This grew to 28.5 million in 2004, fell to 28.2 million in 2007 and again reached 28.5 million in 2008.

The Cumbria sub-regional strategy identifies tourism as one of the key growth sectors capable of creating new jobs in the county. However it is a fragmented industry made up of largely independently owned, small and micro businesses often operating on the margins of success and failure. Recent research [*Locum: Cumbria Tourism Forecasts 2003 and revised in 2007*] has highlighted the twin threats of growing competition from other destinations and complacency amongst many of the established operators. Individually their marketing budgets are too small to achieve a significant impact and many lack the drive and know-how to raise business performance and productivity.

Recent trends suggest that the industry faces some tough times with fierce competition for consumers' spending. Customers will be demanding value for money and the industry will be expected to do more for less. Meanwhile, there is likely to be less public sector support and declining budgets for regeneration, generally.

The World Tourism Organisation predicts that the volume of international tourism should grow in 2010, against a backdrop of a fall of 5% in 2009. However, Visit Britain is forecasting that a quarter of consumers will continue to replace short breaks with day trips during 2010; [approximately 15% will not take short breaks or longer holidays in the UK because of the recession, whilst a similar amount may take a break but spend less].

Businesses will need to be flexible and adapt to changing economic circumstances and consumer trends. Deals and special offers may well be necessary as customers seek out 'value for money'.

However, there is room for cautious optimism in Cumbria, due to the county's unique position as a strong 'brand' and a world class destination. There will be opportunities to exploit any 'staycation' trends and promote the huge range of 'free' experiences the county has to offer ~ getting away from it all, rest and relaxation, stunning scenery, pretty villages, free attractions and outdoor activities including walking and cycling.

**The Lake District, Cumbria** is well placed to capitalise on current market trends, as one of Britain's few truly world class destinations, [winner of the British Travel Awards Best UK Destination in 2008], with a unique product and scope to further add value through initiatives like Adventure Capital, Food Tourism and another phase of capital grants for serviced accommodation improvements in the near future.

### **3. Priorities for Action**

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.***

## Major Tourism Investment Proposals

The 'Top 10' flagship tourism projects emerging from the 'long list' and with a good prospect of progressing in the next 2-3 years are set out in the table below, in order of priority.

Project	Location	£m	Description/projected completion
<b>Roman Maryport</b>	Maryport	£12m	Development of Museum, Camp Farm visitor orientation and major interpretive works. Anticipated completion March 2012.
<b>Lowther Gardens &amp; Castle</b>	Lowther	£15m	Development of Lowther Gardens and Castle, including 121 acres of historic gardens, children's adventure play area, restored sculpture gallery, visitor centre, education and events facility. Expected completion December 2011.
<b>Tourism Connect, phase 2</b>	Rural areas	£1.1m	A second phase of the successful Capital Grants programme, to create new jobs, raise accommodation quality, occupancy and turnover whilst improving environmental performance [with funding from the RDPE].
<b>Windermere Waterfront Programme</b>	Windermere Lake environs	£20m +	Comprehensive programme of developments around Windermere Lake, inc. public realm improvements at Waterhead, e.g. new public square, pedestrianised walkways & a range of sustainable transport improvements at various locations.
<b>Carlisle Roman Gateway / Historic Quarter</b>	Carlisle	£4.8m	To enhance Carlisle's heritage offer, in particular its connection with Hadrian's Wall, to develop the city as the gateway to the western and central section of the Wall. The major projects include the roman gateway gallery within Tullie House, Old Town Hall and TIC refurbishments and Court Square public realm improvements outside Citadel Station. Projected completion April 2012.
<b>West Cumbria Destination Management Investment Programme</b>	West Cumbria	£2.4m	3 year programme including 'Tourism Connect West Cumbria', quality improvement programme and Sense of Place marketing, led by West Cumbria Tourism.
<b>Barrow Waterfront</b>	Barrow in Furness	£50m	Development Masterplan covering 400 acres; to create new marina, cruise facilities, watersports centre, promenades, restaurant and potentially a hotel, alongside retail and residential units.
<b>Adventure Capital Cumbria, phases 2 and 3</b>	County-wide	£1.3m [phase 2] £6.8m [phase3]	Promotion of adventure tourism in Cumbria under the brand "Adventure Capital UK"; joint promotion of a package of activities to a world-wide market, coupled with support and development of existing and new "products" and facilities. Phase 3 will end in March 2012.
<b>Keswick Museum and Art Gallery</b>	Keswick	£1.7m	Bringing the 19 <sup>th</sup> Century Arts & Crafts style building up to modern standards to provide a dynamic new interpretive experience for visitors and residents, relating the story of Keswick and the Northern Lakes and incorporating an Education Centre.
<b>Kendal 'Fit for the Future' Programme</b>	Kendal	£1.3m [public realm]	An ambitious programme of initiatives to position Kendal as the Gateway to the Lakes; initially public realm and transport linkage improvements, with plans for future redevelopment of the Canal Head area, Kirkland's Cultural Quarter, a Creative Campus at the Brewery Arts Centre and a sports village.

Meanwhile, the top 4 priorities for each Delivery Area were identified at the DMP Workshop; these are ~

### **Carlisle, Hadrian's Wall & North Pennines**

- ◆ Carlisle Tourism Partnership – marketing, events and enhancing tourism programme
- ◆ Carlisle City of Culture [whilst the City's bid has not been shortlisted for the 2013 Capital of Culture, the plan is to proceed with the development of proposals aimed at a regional audience]
- ◆ Carlisle's Historic Quarter [inc. Roman Gateway, Old Town Hall, Court Square and Castle St.]
- ◆ Hadrian's Wall World Heritage Site

### **West Cumbria**

- ◆ Roman Maryport
- ◆ Egremont Castle Pavilion
- ◆ Roman Ravenglass, [Muncaster and Ravenglass & Eskdale Railway]
- ◆ Whitehaven Hotel, townscape and orientation programme

### **Barrow**

- ◆ Barrow Waterfront & Marina
- ◆ Dalton Road & Schneider Square public realm improvements
- ◆ Festivals & Events, e.g. Zircus Plus and Water based events, etc
- ◆ Peil Island

### **Eden & South Lakeland**

- ◆ Windermere Waterfront [Brockhole, Waterhead and the Glebe]
- ◆ Kendal's Cultural Quarter, Canal Head Action Plan & public realm improvements
- ◆ Lowther Gardens & Castle
- ◆ Penrith New Squares and public realm improvements

## **4. Measuring Success**

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]
- 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 Destination Management Plan 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.

## Performance Indicators

The following table provides an overview of Cumbria's key destination targets and performance measures over the period 2005 – 2018 derived from the challenges and ambitions set out in strategies at regional and county level [see 3.1]. Much of the data to monitor these various trends and indicators is collected by Cumbria Tourism and its partners through a regular series of occupancy, business performance and visitor surveys. This data is in turn used to prepare regular volume and value statistics using the STEAM methodology.

The performance targets set out for the next few years are based on a relatively modest increase in the number of visitors to the county [1% per annum] but a more ambitious annual increase in visitor spend of 3%. This requires a performance from the industry which is higher than the growth of the economy as a whole. However given the anticipated regeneration programmes [with the potential for significant investment in the visitor infrastructure] in West Cumbria, Barrow, Kendal and Carlisle this sort of growth should be achievable, albeit at a more gradual rate.

The DMP seeks to reinforce the strategy of increasing visitor numbers beyond the obvious tourism destinations and attractions and increasing visitor spend throughout the county. This will involve CT and its partners in focussing efforts on attracting more staying visitors in high quality accommodation, raising occupancy levels across the stock and generating higher levels of spend [again by raising the quality of shops, restaurants, attractions throughout the year]. These principles underpin the targets which are set out in the table below.

Performance Measure	2005	2006	2007	2008	Target 2018	Ambition
Value of Tourism <sup>1</sup>	£1.175bn	£1.161bn	£1.191bn	£1.171	£1.5bn	3% growth p.a.
Volume (trips) <sup>2</sup>	15.3m	15.2m	15.4m	15.3m	17m	1% growth p.a.
No. of staying visitor nights <sup>3</sup>	17.3m	17.2m	17.8m	18.1m	22.1m	2% growth p.a.
Tourism related employment <sup>4</sup>	36,137 jobs 21,010 FTE	35,687 jobs 20,748 FTE	36,017 jobs 20,940 FTE	35,389 jobs 20,575 FTE	44,782 jobs 26,036 FTE	2% growth p.a.
Average spend per staying night <sup>5</sup>	£46.80	£46.45	£46.28	£46.25	£57.54	2% growth p.a.
Room occupancy <sup>6</sup>	56%	56%	59%	57%	66%	1% growth p.a.
Proportion of accommodation with quality rating <sup>7</sup>	24%	53%	61%	69%	80%	80% by 2017
Proportion of accommodation with higher quality ratings <sup>8</sup>	Hotels: 4 star 6% Guesthouses: 4 star 62% 5 star 6% Self catering: 4 star 51% 5 star 7%	Hotels: 4 star 6% Guesthouses: 4 star 63% 5 star 7% Self catering: 4 star 46% 5 star 21%	Hotels: 4 star 9% Guesthouses: 4 star 66% 5 star 9% Self catering: 4 star 49% 5 star 19%	Hotels: 4 star 10% Guesthouses: 4 star 66% 5 star 9% Self catering: 4 star 50% 5 star 15%	Hotels: 4 star 12% Guesthouses: 4 star 82% 5 star 11% Self catering: 4 star 57% 5 star 19%	Increase proportion of 4 and 5 star graded properties by 2% p.a.

<sup>1</sup> Source: STEAM – figures adjusted to 2008

<sup>2</sup> Source: STEAM

<sup>3</sup> Source: STEAM

<sup>4</sup> Source: STEAM

<sup>5</sup> Source: STEAM

<sup>6</sup> Source: Cumbria Tourism Occupancy Survey

<sup>7</sup> Source: Cumbria Tourism DMS. Average across all accommodation types. National and local inspection schemes. Extract July 2009

<sup>8</sup> Source: Cumbria Tourism DMS. Average across all nationally graded.