

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)

# **A REALISTIC DREAM**

## **[Issues Paper]**

**A 10 year strategy for improving the visitor economy of  
Cumbria the Lake District**

**PRODUCED IN PARTNERSHIP BY CUMBRIA TOURISM**

## FOREWORD

*Since persons of genius, taste and observation began to make the tour of their own country and to give such pleasing accounts of the natural history and improving state of the northern part of the kingdom, the spirit of visiting them has diffused itself among the curious of all ranks.*

So began the very first Guide to The Lakes written by Thomas West in 1778. And from that moment began a visitor industry that today is worth more than a billion pounds a year to the Cumbrian economy. With a bit of help from Thomas West and the hundreds of guide book writers who followed him the Lake District has become the second best known tourism brand in Britain after London.

From day one there were debates about how this industry should be managed and expanded, about what services visitors would need, about how the industry would benefit local people and about how the landscapes the visitors had come to see would be protected. This document is the latest contribution to that ongoing debate.

From the time when tourism was in its infancy there were already sharp contradictions in many of the arguments. Wordsworth fulminated about the encroachment of railways into some of the Lakeland valleys but it was his work more than any other that encouraged people to come and marvel at Lakeland's romantic landscapes. Many of the debates have refused to go away. Issues such as the plight of upland farming, rural depopulation and the erosion of Lakeland communities, highlighted so powerfully in Wordsworth's poetry, linger on.

The foot and mouth epidemic demonstrated, again, how interdependent farming and tourism still are. In many parts of remote Lakeland the visitor economy is the only economic engine that's still working, but we still need a buoyant farming sector to manage the iconic landscapes that are at the heart of our tourism industry.

One thing that's dramatically different from West's day is the international dimension of Cumbria's tourism industry (although, even in his time, more than 200 years ago, he was suggesting that people should try the Lakes as a warmer-upper before going to the Alps). Today we are competing in a worldwide market in which, so far as adventure holidays are concerned, for example, we're more likely to see New Zealand as our benchmark rival rather than Snowdonia.

And the benchmark in question is quality. Over the next ten years raising our game in terms of the quality of our accommodation, the quality of the attractions and packages we offer and the quality of the public realm is one of the biggest challenges we face. The public realm, by the way, means the things we take for granted – car parks, public toilets, how clean and well designed our towns are, how effective our tourist information services are. Not glamorous stuff, but vital if we're to make a good impression with visitors who will probably be comparing us with dozens of international destinations.

Like any industry, tourism has its stock of disparaging humour about its customers. You'll have heard the one about the overseas visitor who went into Ambleside Tourist Information Centre and asked the way to the Beatrix Potteries. But the reality is that we're offering our wares to an increasingly sophisticated and well travelled set of customers. They don't have to come to Cumbria. They have plenty of worldwide choice. Our job is to persuade them that this is the best destination in the world that they haven't visited yet. Or at least a destination they really must add to an already over-subscribed list.

This document may look complex but at its heart there's one very simple message. If, in the next ten years, we want the visitor economy to realise its full potential and to make its full contribution to a revitalised Cumbrian economy there's much hard work to do. The detail of what we need to do in the next ten years is in the following pages, but there's a bit of plain speaking to do while we consider these issues:

1. Tourism may not be a statutory responsibility for local authorities but the figures showing how much the industry earns for this county speak for themselves. It's such an important part of the Cumbrian economy that it can no longer be regarded, as it is in some quarters, as an optional extra – an industry that will plug the gaps until something better comes along.
2. Above all, everything we do must be tested against the impact it will have on Cumbria's landscapes. They are our future and our fortune. If they are degraded the whole industry will founder. The section of this document about green [sustainable] tourism isn't included to satisfy some notion of political correctness. It's central to our business success. So, too, is forcing national, regional and local agencies to have a meaningful debate about the future of these landscapes rather than, as seems to happen at the moment, allowing change to happen by default.

*Many now preach the gospel 'Preserve the Countryside'. Let us then preserve it in the best possible way, by teaching as many as we can to use and value it; not by locking it up, or making a museum of it, a kind of spectacle which a man looks at with his hat tipped on the back of his head, as if it were a sacred picture or some holy survival from a better past.*

*H.H. Symonds, Walking in the Lake District 1933*

Visitors to Cumbria the Lake District are as essential now as they were in Symonds day. Without the visitor the Cumbrian economy would be in tatters. That's the reality. That's how important this document is.

The Tourism Strategy for Cumbria, 2008-2018 sets out a vision for the development of Cumbria's tourism industry over the next 10 years. Since the last update of the County tourism strategy, many changes have occurred both at global and local levels. We have tried to chart the significance of those changes while, at the same time identifying a range of new opportunities and priorities. Evidence has been gathered from many sources, most notably strategy documents produced by Visit Britain and the North West Regional Development Agency. [For References & Research Sources, see Appendix 1]

To understand the importance of the visitor economy here you need to know that tourism contributed £1.1 billion to the Cumbrian economy in 2007 and supported more than 36,000 jobs which is the equivalent of 20940 full time [FTE] jobs. Tourism's contribution to the county economy is predicted to rise to £1.5 billion by 2018.

But beyond these headline figures, tourism makes a contribution to virtually every aspect of Cumbrian life – rural and urban regeneration, culture and creativity, outdoor activity and its part in health improvement, underpinning the viability of many community services, employment, investment and helping the county to improve its local and national competitiveness.

Tourism in Cumbria is a success story. Compared with many areas, the industry here is robust and has recovered reasonably strongly from the downturn caused by Foot and Mouth disease, international terrorism and other, what are sometimes described as 'wildcard' events.

There have been local difficulties. The speed limit on Windermere has caused problems for many businesses and a change in market profile. The power boaters and water skiers were high spending customers and new high spending markets will need to be found if Bowness and Windermere are to compete effectively in the 21<sup>st</sup> century.

Improving the productivity and profitability of tourism is a universal aim of all tourism development strategies, and as such is the focus of major investment around the globe.

The Lake District and Cumbria is one of England's finest tourism brands. But all brands need investment and reinvestment if they are to remain competitive and profitable. This message needs to be taken on board by both the private and public sectors. Given the dominance of small lifestyle businesses in Cumbria's tourism industry it will be even more important to collaborate and speak with a single voice if they are to be heard in an increasingly competitive international market place. New product and a new generation of dynamic entrepreneurs will be critically important in accessing new markets and driving quality improvements. In this context, the public sector must create better conditions for enterprise by adopting a more flexible and user- friendly planning policy and a modernised infrastructure within which growth and business creation can more easily occur.

The business sector has much to do as well – most notably in the area of workforce skills. The Leitch Review of Skills in England *'Prosperity for all in the Global Economy: World Class Skills'* examines the UK's long-term skills needs and sets goals for 2020 to ensure the UK is a world leader in the field. The main focus of the Leitch Review is on training and skills for adults, because 70% of the 2020 workforce is already over the age of 16 and the reforms therefore need to be employer led. The Government's response to the Leitch Review aims to start a 'skills revolution' which will close the current skills gaps across all sectors and levels, resulting in higher productivity and the creation of wealth and social justice.

Tourism employers need to be convinced of the need to train and develop their workforce, investing their own time and resources. Some still need to be persuaded that a highly skilled workforce is the route to achieving higher productivity, greater competitiveness and enhanced profitability. Employers will need to be pro-active in order to engage with the skills initiatives and business development opportunities created in response to the Leitch review, and the industry as a whole needs to articulate its needs and priorities. The restructuring of local Business Link and Learning and Skills Council provision means that there's a real need to compensate for the consequent loss of localised business and skills support activity.

In an increasingly competitive market, exceptional customer service skills can differentiate a business from its competition. Successful tourism businesses offering exceptional customer service achieve higher numbers and greater diversity of customers, customer loyalty, increased sales, improved public image and greater job satisfaction for staff. Exceptional customer service encompasses good communication, problem solving and organisational skills, with individuals having high levels of observation and perception.

Customers are becoming increasingly demanding both in terms of products and services. Businesses need to consistently exceed customers' expectations in order for Cumbria to compete effectively with worldwide destinations where that is already happening.

Within an industry largely made up of small and medium sized businesses spread across a wide geographic area such as Cumbria there is, almost inevitably, a lack of co-ordination, leadership and representation. Information is not universally available and the smaller tourism

businesses do not have the capacity to do their own research and gather their own intelligence to guide their activities. Larger businesses with sufficient resources have no real incentive to share the information they gather with others. County-wide research and intelligence activity is therefore necessary to guide and support the industry and minimise duplication of effort.

Key areas of underperformance such as the quality of accommodation and customer service or the deteriorating condition of the public realm require significant public sector intervention to raise the quality of Cumbria's visitor offer. Resources are required to enable Cumbria Tourism to lobby for public sector intervention, build the case for investment and collectively bid for funds to address the problems.

Given the disparate nature of the visitor economy, the numbers of small businesses involved and the different 'sub-destinations' in Cumbria there is an important role in gathering and managing marketing information on behalf of the whole industry. Market forces inevitably focus consumer attention on the Lake District. The product elsewhere in Cumbria is less well developed and resourced. It is important to spread the economic benefits to other parts of Cumbria to assist regeneration, relieve negative visitor impacts in the busier Lakeland villages and towns and improve visitor facilities across the County as a whole. In this context, there is an ongoing need for a coordinated strategic planning and regeneration role for the tourism industry in Cumbria.

Please play your part in implementing this challenging tourism development strategy for Cumbria.

Eric Robson, Chairman  
Cumbria Tourism

## Purpose and Scope of the Strategy

The Tourism Strategy for Cumbria, 2008-2018, sets out the over-arching aims and direction for the visitor economy in Cumbria for the next 10 years. It is not about delivery, which is dealt with in detail via the annual Cumbria **Destination Management Plan** [DMP]s. The Destination Management Plans provide the necessary actions and “who does what”.

Priorities are regularly reviewed through the Destination Management Plan process which engages the views of private and public sector organisations with interests in and influence on tourism issues. The DMP review is convened by Cumbria Tourism and is the definitive plan by which Cumbria Vision and the NWRDA will agree tourism funding priorities for Cumbria.

Important national and regional context and guidance is provided by the Government’s 2012 Tourism Strategy and the North West Tourism Strategy produced by the North West Development Agency. The key strategic aims from the North West Tourism Strategy are:

- Enhanced communication with the region’s visitors
- Higher levels of productivity and performance from the 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 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.

## THE VISION

Where do we want to be?

*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.*

## **Building on Success**

Tourism in Cumbria and the Lake District has enjoyed steady growth for many years, but it is clear that its full potential has not yet been realised. There are lots of opportunities for growth but they will only become reality rather than opportunity if concerted efforts are made by both the private and public sectors working together with a real focus on established **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:**

### **Priorities**

**Priority One ~ Landscape [The Core]**

**Priority Two ~ Outdoor Adventure, Heritage and Culture, Food and Drink and Events [The Visitor Experiences]**

**Priority Three ~ Accommodation, Public Realm and Customer Service [The Basics]**

**Priority Four ~ Marketing [The Means to an End]**

## A wealth of attributes and opportunities

*The five finest things in Scotland are - (1) Edinburgh; (2) The ante-chamber of the Fall of Foyers; (3) The view of Loch Lomond from Inch Tavnach, the highest of the islands; (4) The Trossachs; (5) The view of the Hebrides from a point, the name of which I forget. But the intervals between the fine things in Scotland are very dreary;- whereas in Cumberland and Westmorland there is a cabinet of beauties – each thing being beautiful in itself, and the very passage of one lake, mountain or valley, to another, is itself a beautiful thing again.*

*Samuel Taylor Coleridge 1772 – 1834*

### 2.1 Precious Lakes and Mountains

Cumbria is blessed with an enviable depth and range of visitor attractions but, as it was in Coleridge's day, it's still the Lakes and Fells that are known nationally and internationally and continue to attract millions of visitors each year. Because of that, maintaining and enhancing the Lake District's reputation for environmental quality must continue to be a high priority. There will need to be significant reinvestment in visitor facilities over the forthcoming decade because consumer trends show that there is likely to be an increased demand to visit Cumbria's lakes and mountains. This increase will be driven by a number of key factors

- ***The desire to travel, albeit in more environmentally responsibly ways, remains high.***
- ***Cumbria and the Lake District has excellent credentials to deliver a high quality, environmentally responsible tourism experience.***
- ***Cumbria and the Lake District is conveniently located to service the leisure and recreational needs of millions of people, many of who are seeking out healthier lifestyles involving more exercise and outdoor activities.***
- ***The sheer variety of landscapes – much greater than in any other National Park, provide opportunities for low and high energy activities for people of all abilities and age groups.***
- ***Cumbria and the Lake District's outdoor environment is enhanced by a wealth of local produce, wildlife, culture & tradition which, together, have the potential to give visitors a high quality and fulfilling experience.***

Through necessity and driven by the recognition that they have to keep pace with their global competitors, the private sector is leading the 'Renaissance of the Lake District'; many individual businesses are investing significantly in quality improvements. This investment needs to continue and reach all sectors dependent on visitor income – most notably the retail industry.

But in addition to these 'market led' needs, a key challenge will be the investment needed to improve the public realm, especially improvements to traffic management and public transport, but also the funding of those visitor facilities which are often taken for granted such as public toilets, seating, picnic areas, lay-bys, visitor waste recycling, well kept signs and waymarking and affordable, well managed car parking. Public sector partners will need to rise to the challenges posed by increasing demands from visitors who want to experience a real sense of place, and more than that, a sense of place well cared for. A particular investment need is in the provision of visitor information facilities which, currently, are patchy. It's hard to see how a consistent high quality can be achieved without considerable public investment. These challenges cross the National Park boundary and are every bit as important to the success of new destinations in those parts of Cumbria beyond the Lake District.

## **2.2 Heritage, Culture & Traditions**

Underpinning all visitor destinations is the unique history of local people and their ancestors. Once again, Cumbria has an extraordinary cultural heritage on offer. 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. World class events like the Kendal Mountain Festival, Lowther Horse Trials, Words on the Water literary festival, the Lake District Summer Music festival, blues at Maryport and a celebration of the county's maritime past at Whitehaven all play an important part in showcasing Cumbria's historic and contemporary culture. Such events and festivals will continue to be important in attracting new visitors in future.

## **2.3 Outdoor and Activity Tourism**

For more than a century Cumbria has built a strong tradition in outdoor recreational activities and in recent decades participation in outdoor activities has boomed. Cumbria has first class natural resources for a broad range of adventure sports and with investment in infrastructure and skills could become the national centre of excellence for many activities. But if we are to compete with other adventure destinations such as New Zealand we're going to have to raise our game. Introductory level facilities, improved venues for national and international competition and the ability to provide hassle-free booking of adventure packages on line are all needed.

Cumbria Vision's sub-regional Action Plan recognises the potential of "outdoor sport, education and recreation" as a growth sector and "activity tourism" could assist in our ambitions to attract new, younger, higher spending visitors.

There are obvious opportunities to further develop the West Cumbria and Furness coast, for example, for "adventure sports", including kite surfing, power boating and sailing. The outdoor sports sector can generate significant added value to the local economy and with funding now in place for the Adventure Capital campaign, we have a real opportunity to develop the brand alongside support for existing providers and innovative new products.

Meanwhile, improvement is needed to help visitors find information about activities in Cumbria, make it easier to book activities and dovetail with appropriate, quality accommodation. Similarly, quality assurance for outdoor activity providers is equally important. As part of Cumbria Tourism's on going work to promote and develop the Outdoor Activity sector within the county, CT has created a local accreditation scheme, ROAM (Registered Outdoor Activity Member), for Outdoor Activity providers, which will signpost consumers to those operators that provide safe and quality activities. We will seek to expand this scheme across the county.

The University of Cumbria is a recognised provider of outdoor sports training, with a dedicated Workforce Development Officer to co-ordinate training for adults working in the sector and this is a real asset for the county. This will link directly to the priorities and activities of the National Skills Academy.

The county could do more to promote walking and cycling, as well as the Cumbria Rights of Way network, as part of the Countryside Access Strategy. There may also be scope for

promotion of Cumbria's traditional Lakeland sports as a distinctive feature of our rich cultural heritage.

## **2.4 A crossroads for business and a place to live, learn and work**

Perhaps it is no coincidence that Cumbria is the home to one of the UK's most famous haulage companies – Eddie Stobart. Cumbria is accessible by road, rail and sea, and is a favourite meeting place for businessmen in the North of England. Unfortunately, we still have no international airport service, which is a serious disadvantage and doesn't help the image of Cumbria in today's global market place. The planned development of Carlisle airport has the potential to improve the connectivity and further enhance Cumbria's reputation as an accessible destination.

Rail services are gradually improving with connections between London and Cumbria soon to be an impressive 2.5 hours. But in reality, there are still major improvements needed for weekend travellers and to accommodate the needs of leisure and tourist visitors. Reductions in service at Oxenholme and Penrith on the West Coast main line give cause for concern. To date, Cumbria Tourism has strongly supported the concept of the Morecambe Bay barrage and bridge, which has the potential to become a visitor attraction in its own right, but might also be a significant renewable energy resource as well as an economic regeneration catalyst for south and west Cumbria.

Carlisle, Penrith, Kendal, Barrow, Workington and Whitehaven in particular will continue to prosper from business tourism and all of these major centres have exciting plans to upgrade conference and meeting facilities to attract future business visitors. These plans will be closely linked to Corporate Training and Development opportunities and on the back of new hotels, particularly on the West Coast, in Furness and Carlisle.

The multi-campus University of Cumbria will spread the benefits of educational opportunities across the County and will itself generate a considerable number of visitors – friends, relatives, visiting lecturers, professors and students from all over the world. National Academies for the nuclear industry and outdoor industries are already taking shape and attracting inward investment. With excellent new educational facilities and a state of the art ICT infrastructure Cumbria will also become a more attractive place to live, relocate businesses and bring up families.

Tourism and the visitor economy will play a vital part in providing new employment opportunities in the lesser known visitor areas of Cumbria, complementing service and manufacturing industries.

## **2.5 Undiscovered Cumbrian Coastline and Rural Retreats**

Coastlines around the world have to a greater or lesser extent benefited from tourism (although it is acknowledged that sometimes development has been insensitive and damaging to the environment). Many coastlines similar to Cumbria, have been dominated by traditional industries, shipping and fishing. Many are in the process of diversifying into new industries creating a mixed economy where all types of employment can co-exist for mutual benefit. Transformation of traditional manufacturing areas into a new type of visitor based economy takes time, but already in Cumbria new marinas, heritage centres, places to eat, drink and stay are emerging on Cumbria's coastline. There is wealth of heritage and wildlife, undiscovered

beaches and challenging golf courses. There's the Roman coastal frontier which runs as far south as Ravenglass and is accessible by a Sustrans cycleway and there are established visitor experiences such as the Ravenglass and Eskdale Railway that transports visitors from the coast into the heart of the Lakeland mountains. The new visitor economy is widely welcomed along the coast and local entrepreneurs are already taking advantage of these opportunities.

The same is true of many hitherto undiscovered rural areas of Cumbria. These "off the beaten track" areas, offer a high quality experience for visitors looking for tranquillity and an authentic countryside retreat. A variety of accommodation already exists from exclusive hotels and guest houses often in historic buildings or on farms, to self catering in traditional cottages or contemporary lodges on caravan parks. There is scope for growth which must be sensitively carried out to protect the peaceful qualities that visitors come to experience. Opportunities for relaxing, walking, local food, cycling, environmental appreciation and other activities will continue to be key to business success in these lesser known rural areas.

## **2.6 Marketing, Brands and Visitor Information**

The Lake District is one of the UK's leading tourism brands and is recognised as such by VisitBritain and in the North West Economic Development Strategy. Strong brands are in themselves major economic generators as illustrated by the highly successful Lakes + Foot and Mouth Recovery Programme which directly delivered on average more than 500,000 bed nights and at least £17.5 million each year of the four year programme.

Throughout the world, public funds are increasingly being used for the promotion of destinations. Such funds need to be spent wisely and there's the need to engage the support of commercial partners.

Cumbria must ensure that strong public and private sector collaborative marketing continues if it is to compete effectively in the global tourism market place. This must include improved cross boundary and partnership working with other key brands such as the Yorkshire Dales, North Pennines, Hadrian's Wall, Scottish Borders, Northumbria, Manchester and other North West England brands.

The reality of how people choose their holiday destination has to inform our marketing programme. As a first step we have to raise awareness of the Cumbria the Lake District brand; in effect get it onto the customer's wish list. This will involve the use of high quality images and sophisticated messages which demonstrate that we're a destination that means business. On line and web based marketing has made it easy for consumers to pick and choose, and new technology will continue to improve and provide new ways of receiving marketing messages and making bookings. But the traditional platforms through print, telephone and face to face contact at information centres will continue to provide a vital part of the mix. This visitor communications 'life cycle' requires a joined up and comprehensive approach, Cumbria is already at the forefront of much of this thinking but in future will need to work even harder to compete with emerging destinations.

Cumbria must also continue to ensure that it is properly represented in the marketing activities of VisitBritain, England's North Country, the Northwest Development Agency and other publicly funded organisations, and Cumbria itself should seek to maximise the relevant opportunities presented by such organisations, including the opportunities afforded by the 2012 Olympic and Paralympic Games and the Cultural Olympiad.

It is vitally important to maintain the vigorous marketing and promotion of Cumbria and the Lake District as a premier destination for visitors through joint activity with public and private sector partners. Effective use of electronic media targeted at domestic and inbound visitors is particularly important. Keeping pace with the rapid advance in technology will be a major challenge, and it will be important to build on industry-wide best practice and the good progress already being made in Cumbria.

What this partnership working must deliver to visitors and potential visitors is efficient and easy access to information in the most effective formats.

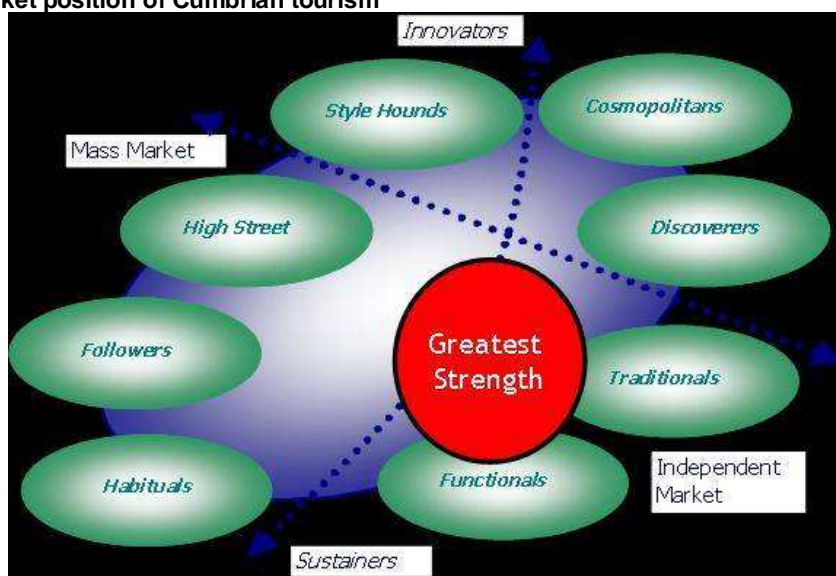
## The domestic market

Research undertaken by Cumbria Tourism and the Northwest Regional Development Agency has provided a rich understanding of the nature of visitors to the county. Segmentation is the industry buzz word but essentially it simply means working out what sort of people choose to come here and why. The main model is based on the *reason* that people have come to Cumbria but they've also been profiled using a model of consumer attitudes to leisure and holidaying that was developed on behalf of VisitBritain<sup>1</sup>. It is called ArkLeisure™ and categorises people into eight groups according to the things they like to do with their leisure time (See Figure 1).

The groups on the left of the model care about what people think about them, are followers of fashion and are particularly brand aware. People on the right tend to do their own thing and care less about brands. People of all these types visit Cumbria, especially the Lake District, in large numbers and there are aspects of the product that appeal to all of them. The research shows however, that the county's tourism offer is most appealing to people on the right side of the model. No surprises there because the destination offer is dominated by the independent, non-branded sector.

The research also suggests, however, that the county has greater relative appeal to the *lower spend* segments on the *lower right* of the diagram than the *higher spend* segments on the *top right*.

Figure 1: Current market position of Cumbrian tourism



<sup>1</sup> The National Tourism agency

This research coupled with other analysis suggests that *Cosmopolitans* and *Discoverers* are the groups with the greatest potential in Cumbria. At present these groups are under represented and with appropriate investment are considered attractive opportunities for market growth. The thinking behind this is that:

- **They are high spending, high value groups**
- **They travel frequently (inc. within the UK)**
- **Cumbria has a product & brand offer that appeals strongly to these groups**
- **They are therefore more likely to return than other 'new visitor' groups – maximising lifetime value**
- **Compared to national averages, Cumbria is currently doing less well at attracting these groups.**
- **There is also a relatively high proportion of such people identified in the 2007 Non-Visitor research data, further confirming the potential new customers we can reach and effectively target.**

For these key segments the main appeal for visiting Cumbria is the natural beauty but research has shown that the other top three reasons to visit were:

- **Places to visit and things to do**
- **Quality of food & drink**
- **Quality of accommodation**

To improve Cumbria's appeal to these segments we need to communicate the quality and sophistication of the retail, food and beverage, cultural attractions and outdoor activities on offer in Cumbria the Lake District. We also need to highlight top quality accommodation.

### **The overseas market**

Overseas markets remain important and also offer scope for growth, but with limited marketing resources the UK visitor has been and will continue to be the major focus for Cumbria's marketing activity. At present UK visitors represent over 90% of the market.

Having said that niche marketing opportunities exist in specific international locations including US, Japan, Australasia, Netherlands and Germany, and also in emerging markets including India and Eastern Europe and in the longer term China. It will be important to work with VisitBritain and England's North Country in these marketing ventures.

## **2.7 The Importance of Accommodation and Quality Improvement**

Accommodation businesses are one of the main economic generators in the tourism sector. Understanding visitor accommodation needs and trends is therefore vitally important.

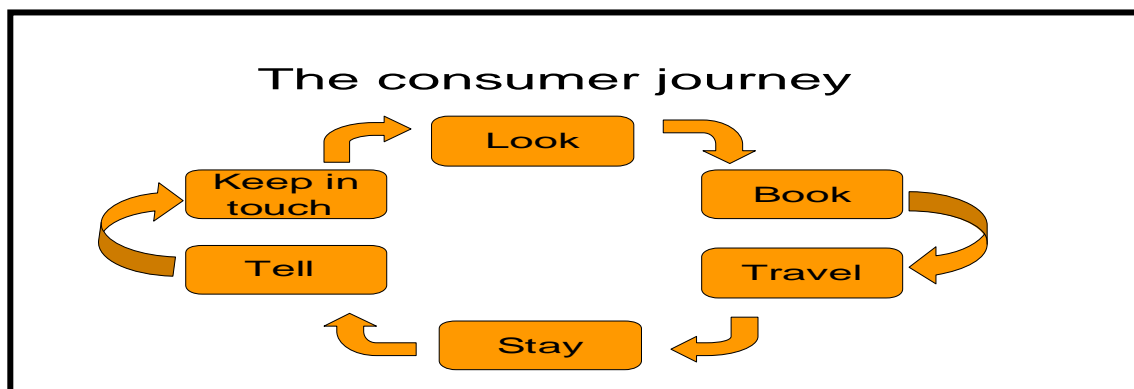
At the end of 2007 about 50% of Cumbrian accommodation establishments – almost 3000 - were not independently quality graded. Visitors considering using these businesses have very limited information or reassurance that the accommodation on offer will come up to an acceptable standard.

But visitors' expectations of quality continue to grow. This in turn creates a continuing need for businesses to invest and reinvest in accommodation improvements. There is much evidence that shows quality graded accommodation to be more productive and profitable than non graded accommodation. The highest quality graded accommodation is also often the most profitable part of the sector. Understandably therefore, the Government's Tourism Strategy and the Northwest Development Agency are keen to drive up accommodation quality standards to assist economic growth, to exceed visitor expectations and encourage return visits. Cumbria must rise to this challenge and continue to encourage accommodation quality improvements.

Providing for visitors with special needs has in recent years improved in Cumbria, but in common with general quality trends, expectations and standards continue to rise internationally and present new opportunities and new challenges for local tourism businesses. While some businesses have recognised the market opportunities and embraced the requirements of the Disability Discrimination Act, many have failed to make the reasonable adjustments needed to improve the welcome for visitors with disabilities.

## 2.8 Understanding Quality and the Visitor Journey

The 'visitor experience' is a broad concept, but it helps to think of it in terms of the consumer journey illustrated in the following diagram.



The journey begins with looking at somewhere like the Lake District as a potential destination. If visitors like what they see they may go on to book, to travel here and to stay for a short break or a longer holiday. Then, depending on the quality of the experience they've had, they either tell their friends how wonderful or how awful the place is. If wonderful they will, hopefully, keep in touch by becoming a regular visitor.

So you can see how important it is to offer our traveller the best possible experience at each stage of the journey;

- Initial information that fires their enthusiasm
- Easy and efficient booking by internet, telephone or travel agent
- Clean, comfortable and on time travel
- High quality accommodation
- Knowledgeable, attentive and skilled staff who are on hand to help and advise
- World class visitor information that allows our travellers to make the most of their holiday.
- Top quality attractions, restaurants, pubs and activities.
- A clean, well designed and well cared for public realm.

Market research plays a vitally important role in identifying strengths and weaknesses and areas in need of improvement at every stage of the journey. For example, on-going research will provide us with suggestions for improvements to visitor information provision and potentially, how to achieve new “world class Visitor Inspiration Centres” in key locations. It would be complacent to suggest that things can’t be improved because a constant search for improvement is the reality of the competitive, modern tourism industry. But to achieve improvement across the board involves a vast range of organisations and individuals. It also means they have to talk to each other to determine priorities and responsibilities. That’s the difficult bit. But with the help and guidance of the North West Development Agency and Cumbria Vision, good progress has been made in recent years and a number of key projects have been established to help make the visitor experience journey as satisfying as possible.

## 2.9 Going greener

Sustainable tourism is fundamental to the long term competitiveness of the sector and will ensure that it continues to make a positive contribution to the quality of the visitor experience and to the overall quality of life of the local community.

*“The objective is to retain the economic and social advantages of tourism development, whilst reducing or mitigating any undesirable impacts on the natural, historic, cultural or social environment. So it is more than just “being green”. [DCMS Making Tourism in England Sustainable: A Framework for Action].*

Green issues have become a mainstream consumer trend and are already a key consideration in consumer purchasing habits. A generation has now emerged that has a high awareness of environmental issues and is also more conscious of healthy living in terms of diet and exercise. Cumbria has always been well placed to serve these consumer demands, but there is no room for complacency with many competing destinations already investing heavily in new products and services to tap the environmentally aware market.

Cumbria was a pioneer in raising the awareness of environmental opportunities and responsibilities and became Britain’s first Green Globe destination in 2000. But the county’s green credentials will constantly need to be improved, particularly in terms of waste recycling, renewable energy and public transport. These issues will be the focus for on-going partnership work, via the Cumbria Climate Change Action Plan.

The quality and distribution of local produce which avoids the need for unnecessary air miles and national and trans-national lorry journeys is improving but needs further development and support.

Cumbria’s natural environment is spectacular. Its landscapes, flora and fauna are a fundamental part of the County’s special quality. To allow the visitor to enjoy this special environment in a sensitive and sustainable way, sufficient resources and careful management will have to be employed. The built environment, particularly the visited centres of our towns and villages will need to match our reputation for excellence in the natural environment. This is going to be a major challenge. An improved transport and travel infrastructure requires significant investment and strong leadership. It is well documented that such infrastructure is an important part of the reputation of a destination. Frankly, we must do better if we are to encourage more environmentally aware visitors to come here and contribute to the desired improvements in the Cumbrian visitor economy. These issues present challenges for tourism

businesses but particularly for the public authorities that have the statutory duty to address them.

## **2.10 Of course we all know tourism is a problem!**

All industries have 'issues', and inevitably with the global scale and significance of travel and tourism, there are problems that need to be addressed. In some parts of the world those problems are writ large – problems environmental, social and economic. But some problems are a matter of perception rather than reality, particularly when applied to a mature tourism destination like Cumbria the Lake District which has been welcoming visitors since the eighteenth century.

There are still those who complain that mass tourism is a ticking time bomb which will eventually destroy the Lake District. But the fact is that we haven't been in the mass tourism business for some decades. Our marketing is aimed at added value tourism visits rather than more tourism visits. And any expansion in numbers is more than compensated for by our campaigns to spread the load into the newer tourism destinations of Furness and West Cumbria, the North Pennines, Eden Valley and the Carlisle borderlands. That we take the environmental balance of tourism seriously is demonstrated by our wholehearted support for the pioneering Tourism and Conservation Partnership, started in the Lake District and subsequently copied in a number of other tourism destinations. It offers tourism visitors an opportunity to put something back into the area that has given them so much pleasure by paying a small supplement on their hotel bill or visitor attraction ticket. Evidence shows that 98% of visitors are happy to pay.

Another frequently voiced complaint is that tourism is a low wage industry. Tourism has a fine track record of providing entrepreneurial opportunities and many people have used the experience of starter jobs in the industry to gain the experience to set up their own tourism businesses. Nevertheless, more can and should be done to improve skills and progression routes within the industry and raise standards of accommodation for staff.

In a county-wide industry with 5,000 businesses and more than 40,000 employees it would be remarkable if there weren't some examples of workforce exploitation and poor working practices. But with public sector bodies and private operators working together we can continue to improve and eventually eradicate any problems that damage the reputation of the visitor economy. Here again Cumbria Tourism has been in the forefront of attempts to ensure that standards are as high as possible, working in partnership with the Tourism Workforce Development programme, Profit through Productivity, Excellence through People and Welcome to Excellence customer care programmes.

## 3. The Next Ten Years

### 3.1 PRIORITIES FOR GROWTH

The Strategy for Tourism in Cumbria has evolved over the last twenty years and in many ways the fundamental vision and aims remain the same. Tourism in Cumbria continues and will continue to be the mainstay of the County's economy; it will continue to grow, particularly in areas undergoing regeneration. But the Lake District will remain our most internationally important brand and will need significant investment, both by the private and public sectors if it is to retain this privileged status in future. We see **four main priorities for growth**:

#### 3.2.1 PRIORITY ONE: Landscape ~ The Core

We need to develop the tourism product in Cumbria to meet the needs and expectations of visitors and the community whilst conserving and enhancing the environment on which tourism depends. Investment priorities must match and respond to consumer demands and so must be evidence based. Public infrastructure investment must create the conditions for private enterprise to prosper and businesses must plan for productivity improvement over the medium and long term.

At the same time, we must make the best of our natural and built landscapes in Cumbria and ensure that development is of the highest standard, embracing top quality design and building materials which are in sympathy with the best of what has gone before.

#### *Creating a sense of place, Spreading the Benefits and the Signature Projects*

New tourism businesses combined with public realm improvement have already re-invigorated places such as Ulverston, Staveley, Keswick, Ambleside, Alston, Whitehaven, Kirkby Lonsdale, Penrith and Cockermouth, Barrow, Workington and Carlisle.

The plans for developing and spreading the benefits of visitor spending throughout Cumbria are at various stages of maturity and are being further developed under the following key schemes:

- Lake District Renaissance
- Britain's Energy Coast
- Barrow Regeneration
- Carlisle Renaissance
- Hadrian's Wall Heritage Ltd
- Kendal Futures
- North West Operational Programme [ERDF] & England Rural Development Plan

It is intended that these ambitious plans will deliver the Government's 'place making and place shaping agenda', and will also result in considerable improvements for both local residents and visitors.

Northwest Development Agency and Cumbria Vision have further identified a number of key priority projects that will contribute to the regeneration of Cumbria, all of which would, in varying degrees, bring new visitors to Cumbria. Those key projects include Derwent Forest, Lowther Castle and Gardens, Carlisle Airport, Port Derwent, Barrow Marina and a new Lake District National Park centre at Brockhole. Under investigation are also exciting plans for a barrage and bridge across Morecambe Bay, linking Heysham, Morecambe and north Lancashire with the Furness Peninsula.

### **3.2.2 PRIORITY TWO: Outdoor Adventure, Heritage and Culture, Food and Drink and Events ~ The Visitor Experiences**

We need to develop those experiences that sit well in our landscape and which will attract new visitors to Cumbria and give them the opportunity to spend more money.

The key themes we'll concentrate on as the drivers for increased visitor spend are:

- ***Outdoors (adventure and natural activities)***
- ***Local produce, food and drink***
- ***Culture (gardens, historic houses, museums, festivals and events)***
- ***Local 'sense of place' marketing in collaboration with private and public partnerships***

A range of marketing techniques will be used to deliver these thematic priorities and support for key **events and festivals** will be an important driver and platform for promotional activity.

### **3.2.3 PRIORITY THREE: Accommodation, Public Realm and Customer Service ~ The Basics**

#### ***Investing in Quality and Improving profitability***

If all this talk of a constant search for quality sounds onerous for tourism businesses the good news is that all the evidence shows that improved quality leads to improved profitability.

So it was that in 2005, VisitBritain produced the Quality in Tourism Strategy stating that by 2010 they wish to see the number of nationally assessed businesses increase from below 50% to above 80%. This Strategy is part of the broader aim to improve the competitiveness of the tourism industry by raising productivity, and boosting profitability through improvements in quality.

One of the key implications for Cumbria and its accommodation providers is that Visit Britain no longer promotes locally inspected accommodation providers and most destinations throughout England are taking the decision to follow suit.

Cumbria Tourism has been working with local partners to address this target and agreement has been reached to develop the Quality Cumbria local inspection scheme as a staging post on the road to full national inspection. It should be noted, however, that this will be a time-limited measure, as a stepping stone to National Accreditation and not an end in itself.

This scheme will harmonise the standards of three local inspection schemes that currently operate in Cumbria and provide a stepping stone for those businesses onto the National Quality Assurance Scheme over the next three years. By developing the one brand:

- Consumers will understand quality assurance better. In the medium term they will be able to choose between AA, VB or the Quality Cumbria scheme.
- We will have a consistent product to offer the estimated 2000 businesses in the county that are not inspected at all.
- Cumbria will have a focus on Quality Assurance ensuring it is not left behind as a destination.

Developing Quality Cumbria involves training the assessors of the three local inspection schemes to the same nationally accredited standard, developing the same inspection standards across the present three providers and undertaking a central administration system to provide a one stop shop for accommodation owners with the aim of engaging non-inspected businesses.

The Local Authority tourism officers, Lakes Hospitality Association, Cumbria and Lake District Self Catering Association (CALSCA) and Accommodation Inspection Advisory Service (AIAS) have agreed to work with and support Cumbria Tourism on the project.

Reducing carbon footprints and improving the environmental performance of businesses will also be a high priority. A broad range of advice and support is available from Environment Connect, Cumbria Business Environment Network and the Tourism and Conservation Partnership. Tourism businesses will be encouraged communicate the special qualities of Cumbria's environment and to seek voluntary donations to help fund conservation and enhancement projects. Evidence from the work of the Tourism and Conservation Partnership, already mentioned, suggests that such an approach will be popular with visitors.

Successful new product and business development continues but not at a pace to replace the declining industries of Cumbria. Excellent progress is being made in the food and drink sector, there are some exciting new and improved visitor attractions such as the new K Village in Kendal and Muncaster Castle, re-inventing themselves and incorporating exciting new visitor appeal. Accommodation contributes the largest share of tourism value in Cumbria, therefore improvements to the stock, both in terms of new build and refurbishment of existing establishments will continue to be of vital importance. Recent research [Locum, Cumbria Hotel Demand Study] has highlighted a potential need for new 4/5 star hotels in the county, in order to attract new visitors that will deliver growth in spending and the need for the public sector to create the conditions for private sector investment.

However, investment in new provision is not mutually exclusive from improving, extending or redeveloping existing accommodation stock. The principles of sustainable development, complex as they are, need careful consideration in product development and investment decisions. Tourism businesses should be encouraged to invest in innovative products that reduce the carbon footprint of their operations and that of their visitors. There is growing evidence that visitors expect increasingly high standards of sustainable practices including energy efficiency, use of local foods, effective waste recycling and other good environmental management practice. Clearly, the onus is on all businesses to improve performance in this respect. But the public sector must do its bit, too, by providing better facilities to encourage communities and businesses to engage in best environmental practice.

### ***Traffic management and Transport improvements***

The needs of visitors are often inadequately considered in the County's traffic management and transport plans. Clearly greater effort is needed to develop an infrastructure for the visitor which provides better integration with sustainable transport networks in order to improve the visitors' experience of the region while at the same time bringing added community and environmental benefits. As a destination we should be providing day and multi travel cards

interchangeable for all sustainable transport in Cumbria. More work needs to be done to expand and waymark the network of cycleways and other rights of way through the County. Sunday services should be restored on the Cumbrian coastal railway – one of the most scenic in Britain but currently under resourced and under used. The re-opening of the Keswick to Penrith railway could provide a real opportunity for visitors and local commuters alike.

We must, however, recognise that the majority of our visitors will continue to come by car in the foreseeable future (car-bound tourism business is currently worth £900 million to the Cumbrian economy) and the issue of visitor car parking, at present an unwelcoming muddle, must be addressed. All day or all week ticketing, which allows visitors to use car parks operated by different local authorities and other providers such as the National Park and National Trust, should be considered. These will be areas for joint investigation and the Lake District Partnership's emerging transport plan will help to provide more focus.

The funding of new transport infrastructure poses a difficult challenge in the current climate of public funding restraint. The debate around the effectiveness and priorities of current public expenditure will need to be given a higher profile if these major infrastructure needs are to be properly addressed.

### **3.2.4 PRIORITY FOUR: Marketing ~ The Means to an End**

#### ***Market Development and Communications***

Identifying markets that have the best prospects for growth is the subject of ongoing market research by VisitBritain, NWDA and Cumbria Tourism.

The Lake District's wide appeal and brand strength, enhances Cumbria's reputation as a place in which people want to live, work, invest and, particularly in this context, visit.

But the County needs to join up its brand management arrangements and present a more consistent message and image to the outside world. Local authorities in particular need to collaborate more, get better at sharing information and take on board the professional advice of specialist agencies and delivery partners such as Cumbria Tourism.

A new Growth Marketing Strategy has been developed by Cumbria Tourism based on the results of an extensive research programme. It also builds on the success of the FMD Recovery Programme and our growing experience with new technologies. The Strategy seeks to attract new visitors to Cumbria while at the same time retaining or regaining those loyal repeat visitors who are increasingly being tempted to other destinations.

The key objectives of this new Growth Marketing Strategy are to:

- ***Contribute to Cumbria's economic regeneration by increasing the value and volume of tourism throughout the county.***
- ***Strengthen Cumbria's positioning as England's No 1 quality rural destination***
- ***Improve Cumbria's image and reputation via consistent brand messages across all marketing activities***
- ***Spread the benefits across Cumbria & extend the season and improve mid week occupancy via promoting priority themes and clusters***

### **3.2.5 Clear Strategy, Leadership and Roles**

It's up to all partners who rely on income from visitors, be it directly or indirectly, to raise the profile of the tourism industry, to address the weaknesses identified in this strategy paper and to influence, in whichever way we can, public sector policies, plans and strategies.

The Northwest Regional Development Agency (NWRDA) has a statutory duty to develop tourism in Cumbria and Cumbria Tourism is the main delivery partner in the County. But there are other important tourism delivery partners, including the Local Authorities, National Park Authorities, Hadrian's Wall Heritage Ltd, National Trust and the enterprise agencies such as Cumbria Vision and West Lakes Renaissance. Policies relating to the improvement of the public realm, including heritage, culture, events, festivals and issues relating to transport, car parking, public toilets, picnic areas and signposting will continue to be the responsibility of Local Authorities.

The strategic priorities are regularly reviewed through the Destination Management Plan (DMP) process which engages the views of almost 40 bodies, including representatives from private and public sector organisations with interests in and influence on tourism issues. The DMP review is convened by Cumbria Tourism and is the definitive plan by which Cumbria Vision and the NWRDA will agree tourism funding priorities for Cumbria.

For tourism to flourish in Cumbria there is a need to understand the needs of visitors, tourism businesses and employees, and to share this intelligence with others involved in delivering services to them and to represent their interests whenever necessary. Cumbria Tourism will take the lead in gathering this intelligence and representing the needs of visitors and of the tourism industry.

## POLICY TO ACTION - Targets and measures.

*On Saturday, we left Newby Bridge, and came by steamboat up Windermere Lake to Lowwood Hotel, where we now are...As yet I have seen no wildness, everything is perfectly subdued and polished and imbued with human taste, except, indeed, the outlines of the hills, which continue very much the same as God made them.*

*Nathaniel Hawthorne, July 13<sup>th</sup>, 1855*

It's remarkable how little has changed in the century and a half since Hawthorne took the steamer from Newby Bridge. What he saw is the legacy we cherish still; is the reason for the care with which we approach the next decade.

The Strategy sets out a range of challenges for both the private and public sectors. The opportunities for growth are numerous but will only materialise if concerted efforts are made by all to focus on the priorities identified. To keep track of progress we will annually update the Destination Management Plan, this process will also allow us to review priorities, be flexible and accommodate new ideas.

The following targets are put forward as indicators and measures for growth over the next ten years; (see Appendix Three for Baselines and Timescales).

### 4.1 Volume & Value Growth

**To grow the value and volume of tourism in Cumbria in a sustainable way by continuing to develop tourism destinations beyond the boundaries of the National Park and also by restoring the fortunes of the Lakes heartland by attracting higher value added business. By doing so we will continue to improve tourism's contribution to the GDP and GVA of the county and the region.**

#### TARGETS

- Increase visitor spend from £1.1 billion to £1.5 billion in real terms by 2018 (N.B. This is based on an 'ambitious' but achievable medium growth scenario)
- Increase the volume of trips to the county from 15.2 million to 17 million by 2018 (N.B. The biggest increase in volume of trips will occur in areas outside the Lake District where there is the greatest capacity and scope for growth)
- Increase tourism supported jobs from 20,940 to 26,500 by 2018 (N.B. Employment growth in tourism will occur throughout Cumbria and lead to demands for new and improved accommodation)

## 4.2 Vigorous Marketing

**To develop new and retain existing high value visitor markets by vigorous collaborative marketing and promotion.**

### TARGETS

- Increase Return on investment target  
Retention activity 30:1  
Acquisition activity 5:1
- Increase value of online bookings by 5% per annum.
- Improve media recognition of Cumbria by 10%

## 4.3 Business Performance

**To assist the regeneration of Cumbria and the Lake District by improving the quality and productivity of existing businesses, encouraging new enterprise and business development.**

### TARGETS

- To raise the proportion of tourism businesses that have a written business plan from 27% in 2007 to 37%.
- To increase the proportion of accommodation providers with national quality assurance standards from 53% to 80% by 2018.
- To establish quality standards and targets in other non-accommodation sectors.
- To maintain and improve success in the Enjoy England awards for Excellence.
- To increase the number of tourism employees with NVQ2

## 4.4 Environmental Improvement

**To provide the conditions which will deliver a world class visitor experience while continuing to recognise the need to maintain and enhance Cumbria's environmental integrity.**

### TARGETS

- To raise a further £2 million from visitor payback schemes.
- To promote accreditation of environmental performance and deliver a minimum of 250 assessed tourism businesses by 2018
- To improve the carbon footprint of visitor-dependent businesses in Cumbria by establishing effective waste recycling targets and improving the range and quality of public transport provision for visitors.

## 4.5 Sustaining Communities

**To contribute to sustaining local communities in Cumbria by encouraging investment in local services, employment, the environment, culture, creativity, heritage and healthy outdoor activities.**

### ACTIVITIES

- To ensure that visitor needs and opportunities in Cumbria are fully embraced in all relevant plans and strategies.
- To lobby politicians for increased investment in the public realm improvements and to publicise their benefits for visitors and local residents alike.
- To lobby with Cumbria's tourism industry for policies and regulations that help improve business performance and visitor satisfaction.
- To support the industry's labour force, both indigenous and immigrant, and to encourage employers to adopt the highest skills development standards.

## 5. WHAT NEXT?

**PETER CROSTHWAITE**  
**FORMERLY NAVAL COMMANDER IN INDIA**  
**Surveyor and seller of maps of the Lakes**  
**Master of the celebrated museum**  
**At the Quadrant, Telescope and Weathercock**  
**A little below the middle of Keswick**  
**He has sold many thousand maps of the Lakes...**  
**And added every thing which could be thought**  
**necessary or useful to the tourist**

Handbill for Crosthwaite's museum, 1792

See, nothing new. The business of tourism has been hard at work in the Lake District for well over 200 years. Over that time it's re-invented itself again and again and now we'd like to encourage everyone with a role to play in improving the visitor experience to work together to make these ambitious dreams a reality.

## **Appendices**

- 1. References & Research Sources**
- 2. Strategic Summary & Who Does What**
- 3. Targets & Evaluation Measures**

## Appendix One

### References & Research Sources

VisitBritain's UK Tourism Strategy – Tomorrow's Tourism (1999), (Revised/Updated)  
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Cumbria County Council - Cumbria Cultural Strategy, 2006  
Cumbria Institute of the Arts - Cumbria Craft Industries Strategy, 2007  
Carlisle Renaissance Economic Strategy, 2007  
West Lakes Renaissance – Britain's Energy Coast, 2007  
Lake District National Park Partnership – A Vision for the Lake District National Park, 2006-2030, (2006)  
Various strategies and plans of Allerdale Borough Council, Barrow Borough Council, Copeland Borough Council, Carlisle City Council, Eden District Council and South Lakeland District Council.

## Appendix Two – Strategic Summary & Who Does What

Strategic Priority	Main Headings	Sub Headings	CT Lead	Lead Organisation	NWDA Lead	County Strategic Partnership	Private sector engagement
<b>Improving Quality [THE BASICS]</b>	Improving profitability	Quality accreditation	Industry Services	CT	DG	C. Vision	CT Industry Services working group, BHA
		Business development	Industry Services	Business Link	DG	CLEAN C. Voice	CT Industry Services working group
		Skills development	Industry Services	People 1 <sup>st</sup>	DG	LSC	CT Industry Services working group
		Sustainable Management practices	Industry Services	CCC	MA	CSP	CT Industry Services working group
		Tourist Information Centres	Industry Services	VB	BP	CT	CT Industry Services working group
<b>Development &amp; Investment [THE CORE]</b>	Place making, Spreading benefits & Signature Projects	Accommodation	Development	CT	DG	CSP/CV CEDOG	CT Development working group
		Attractions	Development	CT	DG	CSP/CV	CT Development working group
	Traffic Management & Transport	Public Realm	Development	LAs, CCC, NPA	PR/JR	CSP/CV	CT Development working group
		Transport strategy	Development	CCC	PR	CTG	CT Development working group
	Hotel Development	Green Product and business efficiencies	Development			CBEN	CT Development working group
<b>Market Development &amp; Communications [THE MEANS TO AN END]</b>  <b>[VISITOR EXPERIENCES]</b>	Acquisition Retention	Destination Marketing	Marketing	CT	NBS/RMF	CSP/CV	CT Marketing working group
	Key Themes	Visitor Information	Marketing	CT	BP	CSP/CV	CT Marketing working group
		Food & Drink	Marketing		PR or FNW	CV	DC/MiC/CT
		Culture	Marketing	CC	NBS or CNW	CC	Culture Cumbria
		Outdoors	Marketing		NBS/AG	CV	OIWG
		Green Tourism product promotion	Marketing	CT	MA or SNW	CC Action Plan	CBEN
<b>Tourism Strategy &amp; Leadership</b>	<b>Targets &amp; Measures</b>	Evaluation research Reporting Business Planning	Executive Board & CEO	CT	JB	CSP	CT Executive Board & CM's Group

<b>Skills, R&amp;D &amp; Innovation</b>	<b>Schools, Colleges and University</b>	<b>See Cumbria Economic Plan</b>	<b>Industry Services</b>	<b>Cumbria Vision</b>		<b>LSC UoC / LUTC</b>	<b>CT Industry Services working group</b>
<b>Housing Strategy</b>	<b>Private sector, Affordable</b>	<b>See Cumbria Economic Plan</b>	<b>Development</b>	<b>Cumbria Vision</b>		<b>CCC</b>	<b>CT Development working group</b>
<b>Business Support and Enterprise</b>	<b>Business Link, Invest Cumbria, Premises, Public sector</b>	<b>See Cumbria Economic Plan</b>	<b>Industry Services</b>	<b>Cumbria Vision</b>		<b>BL liC</b>	<b>CT Industry Services working group</b>
<b>Rural Strategy</b>	<b>Agriculture Access Home working Services + Support</b>	<b>See Cumbria Economic Plan</b>	<b>Development</b>	<b>Cumbria Vision</b>		<b>CCC</b>	<b>CT Development working group</b>
<b>Connectivity</b>	<b>Roads Rail Air Water Sustainable transport ICT</b>	<b>See Cumbria Economic Plan</b>	<b>Development</b>	<b>Cumbria Vision</b>		<b>CCC</b>	<b>CT Development working group</b>
<b>Sustainable Communities Economic + Social Inclusion</b>	<b>Worklessness, Cultural/sporting, migrant workers</b>	<b>See Cumbria Economic Plan</b>	<b>Industry Services</b>	<b>Cumbria Vision</b>		<b>CSP</b>	<b>CT Industry Services working group</b>

### Key to Abbreviations

CT – Cumbria Tourism	CCC – Cumbria County Council	LSC – Learning and Skills Council	CBEN – Cumbria Business and Environment Network	BL - Business Link liC – Invest in Cumbria
VB - VisitBritain	NPA – National Park Authority	CSP – Cumbria Strategic Partnership	CLEAN – Cumbria Local Enterprise Network	CM’s Commercial Members of Cumbria Tourism
CV – Cumbria Vision	LA’s – Local Authorities	OIWG – Outdoor Industries Working group	UoC – University of Cumbria	LUTC – Lancaster University, Tourism Centre

## Appendix Three– Targets & Evaluation Measures

Strategic Aim	Targets / Measures	Baselines / Notes	Evaluation methods
1. To grow the value and volume of tourism in Cumbria	Increase visitor spend from £1.1 billion to £1.5 billion in real terms by 2018	Baseline £1.074 billion [2006] This is based on an 'ambitious' but achievable medium [2%] growth scenario	STEAM
	Increase the volume of trips to the county from 15.2 million to 17 million by 2018	Baseline 15.2 million [2006] The biggest increase in volume of trips will occur in areas outside the Lake District where there is the greatest capacity and scope for growth	STEAM
	Increase tourism supported jobs from 20,940 to 26,500 by 2018	Baseline 20,940 FTE [2007] Employment growth in tourism will occur throughout Cumbria and lead to demands for new and improved accommodation	STEAM
2. To develop new and retain existing high value visitor markets by vigorous collaborative marketing and promotion	Increase Return on investment target - Retention activity 30:1 - Acquisition activity 5:1	Baseline to be established in marketing strategy using VB methodology.	CT Evaluation Research
	Increase value of online bookings by 5% per annum.	Baseline £92,780 p month [2006] Analysis of Destination Management System	CT Evaluation Research
	Improve media recognition of Cumbria by 10%	Equivalent advertising value assessments	CT Evaluation Research
3. To assist the regeneration of Cumbria and the Lake District by improving the quality and productivity of existing businesses and encouraging new enterprise and business development	To raise the proportion of tourism businesses that have a written business plan from 27% to 37%.	Baseline 27% [2007]	CEIP's 3-yearly Cumbria Business Survey, [Hotel & Restaurants sector]
	To increase the proportion of accommodation providers with national quality assurance standards from 50% to 80% by 2018 across all categories of accommodation.	Baseline 50% [2006]	National Quality Assurance Scheme data review
	To establish quality standards and targets in other 'non-accommodation' sectors.	To be developed by cluster and thematic groups	National Quality Assurance Scheme and VisitBritain data review
	To maintain and improve success in the Enjoy England awards for Excellence.	Under review	CT Annual Awards recruitment and success

	To increase the number of tourism employees with NVQ2 to 80%	National Skills Strategy seeks to achieve 90% by 2020 increasing from 69% in 2005.	People 1st
	To improve customer service in line with Cumbria's world class aspirations	Baseline to be established in marketing strategy using VB methodology.	VB and NWDA perceptions studies
4. To provide the conditions that will deliver a world class visitor experience while continuing to recognise the need to maintain and enhance Cumbria's environmental integrity.	To raise a further £2 million from visitor payback schemes.	Monitored by Tourism and Conservation Partnership	T&CP
	To promote accreditation of environmental performance and deliver a minimum of 250 assessed tourism businesses by 2018	Baselines 50 GTBS/39 CBEN [2007] Source; Green Tourism Business Scheme & Cumbria Business Environment Network, minimum Bronze Award	Green Tourism Business Scheme and other green accreditation schemes
	To improve the carbon footprint of visitor-dependent businesses in Cumbria by establishing effective waste recycling targets and improving the range and quality of public transport provision for visitors.	Baselines to be determined	Climate Change Action Plan
5. To contribute to sustaining local communities in Cumbria by encouraging investment in local services, employment, the environment, culture, creativity, heritage and healthy outdoor activities.	To ensure that visitor needs and opportunities in Cumbria are fully embraced in all relevant plans and strategies.	See Annual Report and Accounts	1/4ly Progress Report to NWDA. Also reflected in overall value and volume annual STEAM reports.
	To lobby politicians for increased investment in the public realm improvements and to publicise their benefits for visitors and local residents alike	See Annual Report and Accounts	1/4ly Progress Report to NWDA. Also reflected in overall value and volume annual STEAM reports.
	To lobby with Cumbria's tourism industry for policies and regulations that help improve business performance and visitor satisfaction.	See Annual Report and Accounts	1/4ly Progress Report to CT Commercial Members Committee.
	To support the industry's labour force, both indigenous and immigrant, and to encourage employers to adopt the highest skills development standards	See Annual Report and Accounts	Cumbria Employment Survey (CEIP)