

# A Destination Management Plan for Cumbria

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Lake District  
National Park



YORKSHIRE DALES  
National Park



# Business intelligence – Autumn 2023

- **44%** - visitor numbers **lower** than last summer (24% said higher)
- **YTD** - **51%** said have had **fewer** visitors than in **2022** (28% said higher)
- **International** - picking up but group travel still subdued
- **Ancillary spend** – worsened compared to 6 months ago 54% (44%)
- **Profit levels** - 70% say profits levels down
- **Costs** - 60% say costs have increased **significantly**
- **Levels of debt** - up for 23%

## Bookings:

- **55%** have lower than usual between half term and Christmas
- **47%** say festive season lower than normal
- **50%** have reduced level for 2024 (18% are up)

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# Staffing

- **Increasing wage costs** - 94% say problematic (91%)
- **Recruitment** - 79% say a problem (86%)
- **Lack of applicants** – 86% (78%)
- **Recruitment costs** a problem – 63%. Agency costs – 52% (39%)
- **Financial pressures** – wage, recruitment and agency costs - 48%
- Struggling with **retention** – 58% (70% )
- **Skills shortages** – problem for 63% (66%)
- **Limiting** business capacity for 63% (66%)
- **Reducing quality** of visitor experience – 55% (61%)
- Impacting on **profitability** – 52% (52%)
- Increasing **costs** – 45% (48%)
- Forcing temporary or partial **closures** – 20% (41%)

# Housing & Transport

- 75% - 87% (**80%+**) public transport issues – timetables, frequency, coverage and connectivity
- Around **half** describe public transport issues as **significant** for their business
- **8 out of 10** who employ **staff** have **problems with travel** distances and cost
- 86% (**76%**) cite a **lack** of affordable **housing** as an issue
- 76% (**78%**) cite **cost** of **accommodation** for **employees**
- 86% (**81%**) cite lack of private rental properties
- 56% (**54%**) cite lack of on-site staff accommodation



# Cost concerns

- 86% (**86%**) - increased costs in general
  - 76% (**94%**) - rising energy bills
  - 67% (**71%**) - impact of the cost of living crisis
  - 71% (**66%**) - concern about passing on cost increases to customers
  - 58% (**56%**) - concerned about inflation
  - 48% (**51%**) - labour costs
  - 46% (**48%**) - worried about fuel costs
  - **45%** now worried about **interest rates**
- 
- Over **half** have reduced their overall energy consumption
  - **72%** switched to LED lights
  - **30%** reduced food waste
  - **28%** are buying more locally
  - **23%** using solar
  - **16%** (20%) reducing business capacity or opening hours

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# Confidence

- Although short-term fairly pessimistic, signs of **longer-term positivity**
- **Small %** expect to **grow** over the **next 6 months**, **more** expecting to **shrink**
- Picture **balances** out over 5 **next 12** months
- **Reversed** when looking at 5 **next 5** years, when over **1/2** anticipate **growth**
- 89% (**82%**) **confident** in survival to the end of **2024**
- 59% (**63%**) confident in survival over **next 5 years** (up **45%** on same time last year)

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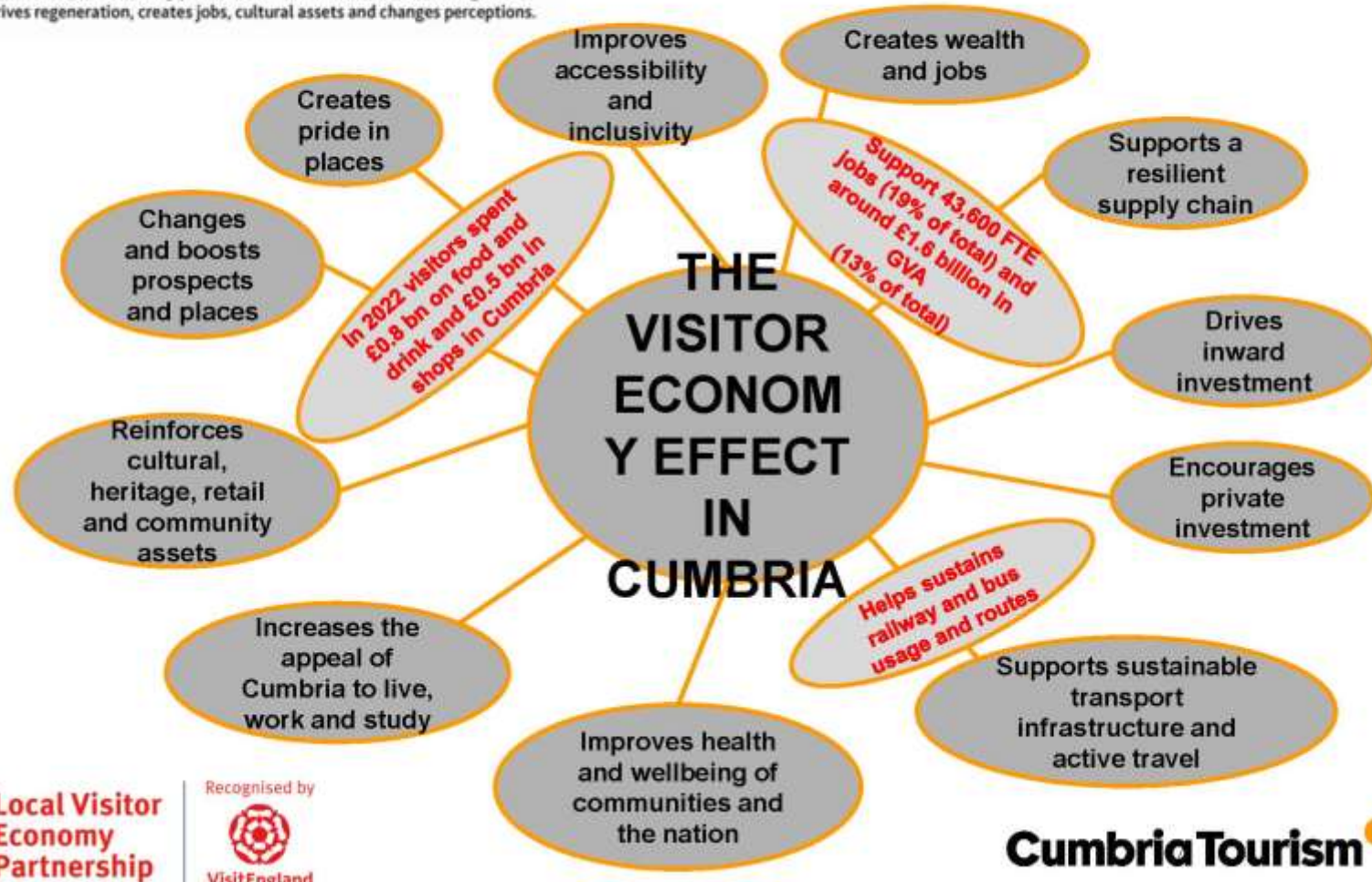


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# The importance of the visitor economy and its wider linkages

## The Wider Value of the Visitor Economy

Cumbria's visitor economy provides so much more than economic growth. It drives regeneration, creates jobs, cultural assets and changes perceptions.



# Gathering and interpreting the Evidence

## Data and intelligence including:

- Existing product
- Current performance
- Visitor feedback
- Issues for businesses
- Identifying local issues
- Reflecting external trends
- Competitor analysis
- Testing to understand barriers to visiting
- Investment plans
- Other destination approaches
- Call out for actions

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# Volume, value and origin of visitors in

2022

**41 million** visitors generated **£4.1 billion** of total spend

- This supports £1.2 bn in direct GVA
- Overall, an estimated 34,300 jobs directly (FTEs)
- 43,600 FTE jobs (19%) and around £1.6 bn in GVA (13% in 2021)

*In terms of **jobs supported**, the visitor economy **is the largest source of employment in Cumbria***

**But....**

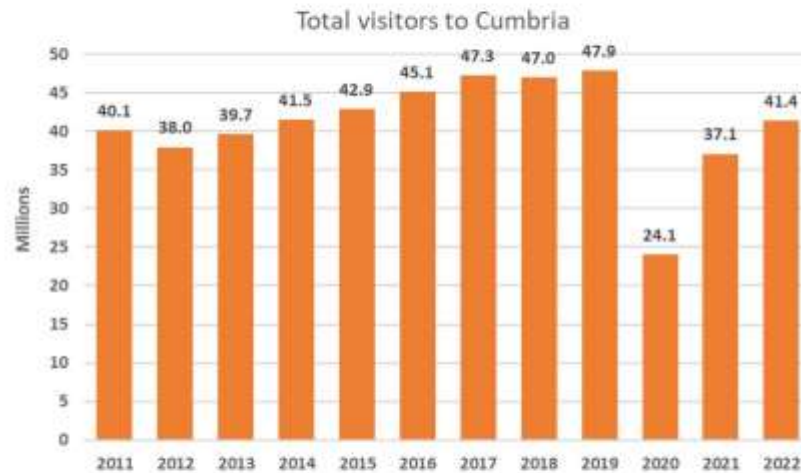
- Relative importance of the visitor economy **varies** widely **across Cumbria**
- Visitor economy has **still to recover** to pre-Covid levels
- Of overnight visitors, **two thirds** came from **the North**
- Day visitor numbers **16.5% down** on pre-Covid levels
- **International visitors** only **3%** of the total - significantly below pre-Covid
- The pattern of visitors post Covid has shifted
- **14%** included someone in their group with a **health issue** or **disability**

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# Overall Progress

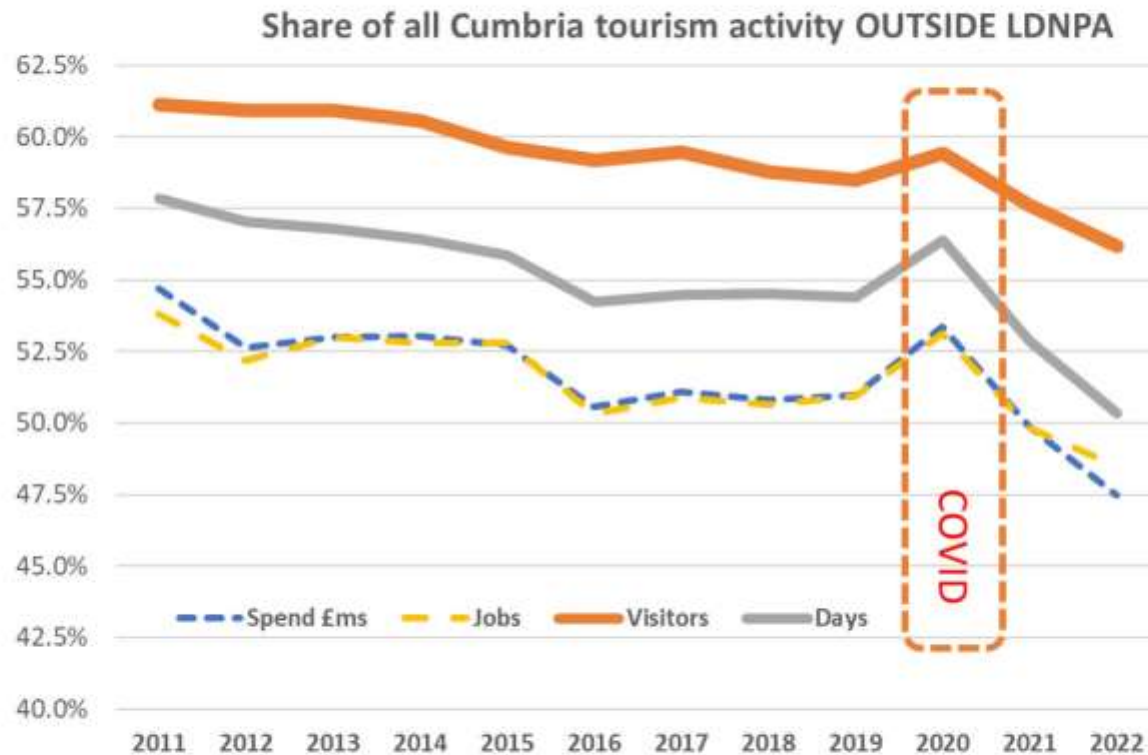


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# Attract and disperse – progress slowing...?

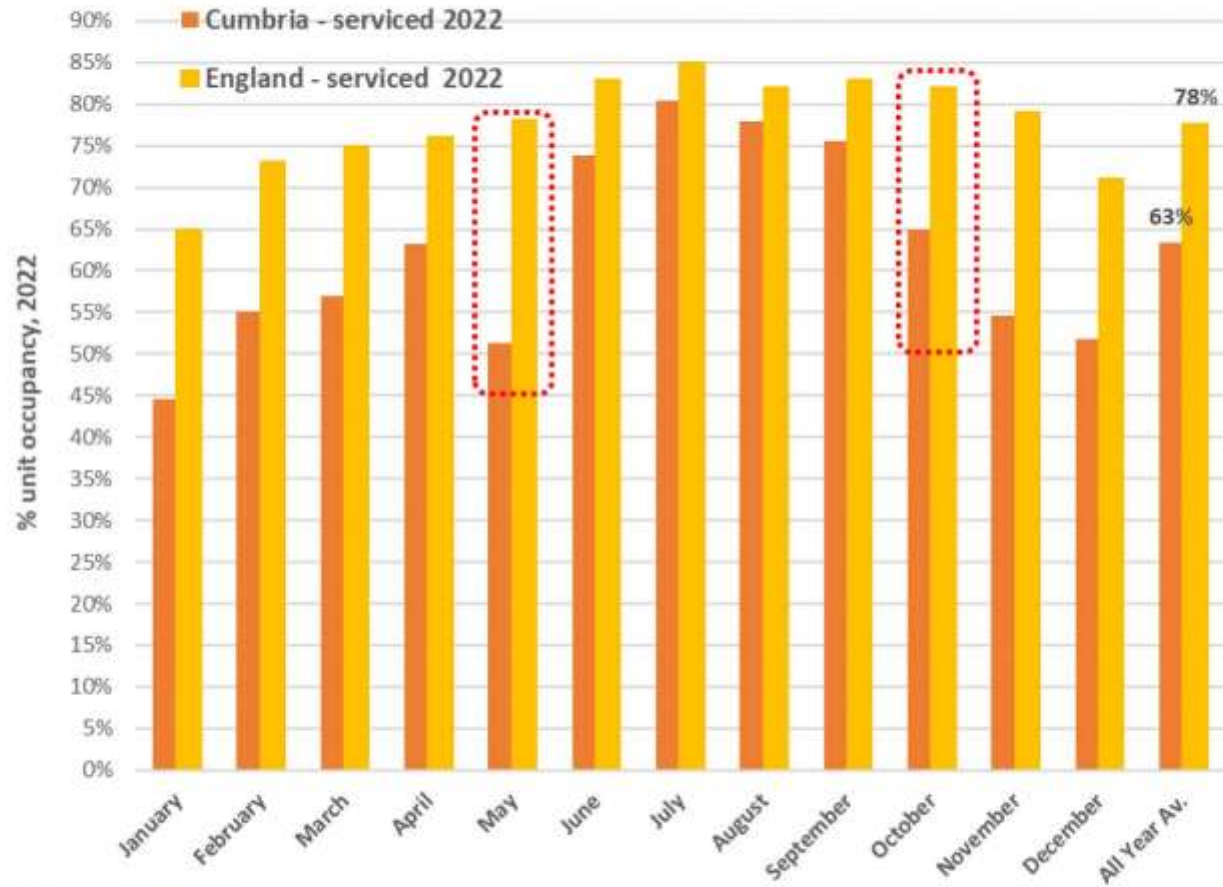


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# Extend the season...



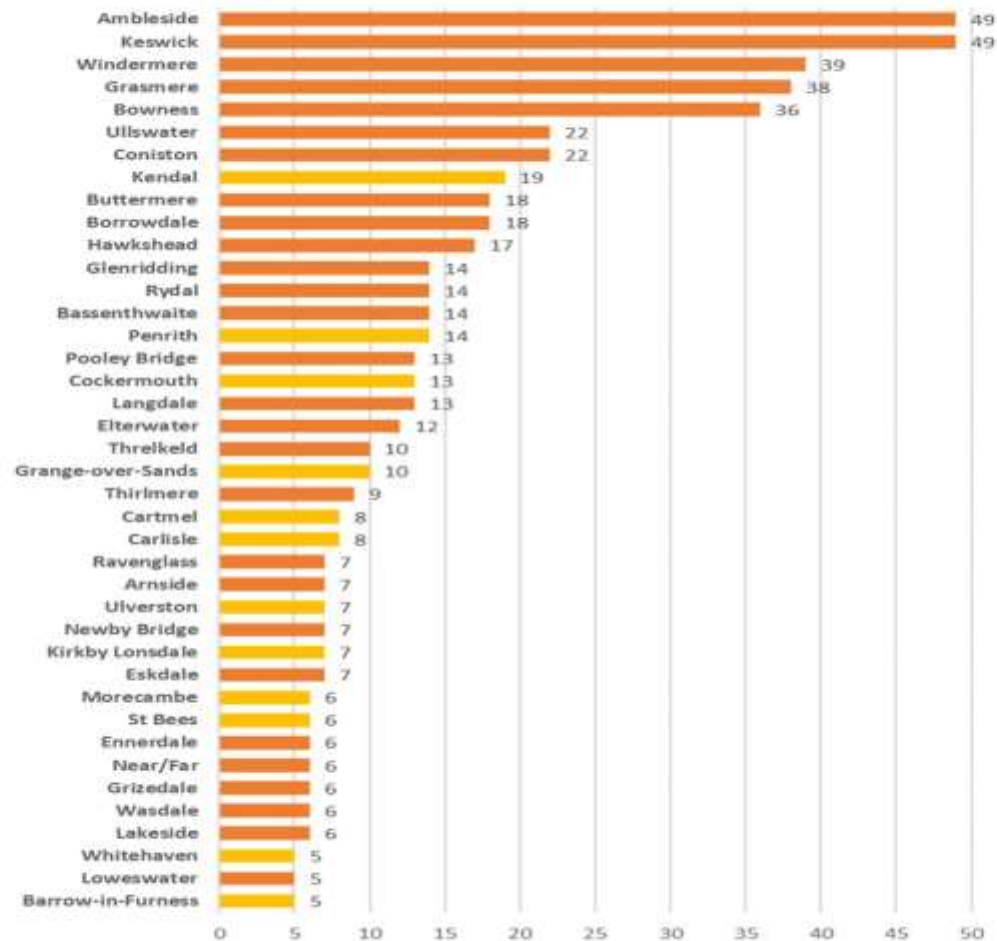
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# Most popular places visited



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# Infrastructure challenges and opportunities

- Housing
- Workforce - *skills, recruitment & retention*
- Transport - *worker, visitor, resident*
- Digital connectivity
- Economic
- Social
- Environmental
- Visitor management

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# The Vision

**Famed for our world-class landscapes and culture -**  
**by 2040 Cumbria will be Britain's most vibrant and sustainable rural destination, boasting a reputation**  
**for quality, welcome, and an adventure for everyone - bringing benefits for our visitors, economy, nature and communities**

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# Key objectives and priorities

OBJECTIVE 1 – DRIVE ECONOMIC GROWTH	OBJECTIVE 2 – RESPONSIBLE, SUSTAINABLE & INCLUSIVE	OBJECTIVE 3 - RESOURCED TO DELIVER
Increasing the value and productivity of Cumbria's Visitor Economy	Supporting responsible tourism, benefitting the environment and vibrant communities	Supporting the sector and ensuring the infrastructure to deliver world class experiences

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# Objectives

<b>OBJECTIVE 1 – DRIVE ECONOMIC GROWTH:</b> Increasing the value and productivity of Cumbria’s Visitor Economy	<b>OBJECTIVE 2 – RESPONSIBLE, SUSTAINABLE &amp; INCLUSIVE:</b> Supporting responsible tourism, benefitting the environment and vibrant communities	<b>OBJECTIVE 3 - RESOURCED TO DELIVER:</b> Supporting the sector and ensuring the infrastructure to deliver world class experiences
<p><b>1A:</b> Continue to implement strategy to raise appeal and awareness of less well-known parts of the county</p> <p><b>1B:</b> Grow the all-season offer and become known as a year-round destination for all</p> <p><b>1C:</b> Attract more overnight stays and extend lengths of stay</p> <p><b>1D:</b> Regain and grow international spend and other higher value overnight stays</p> <p><b>1E:</b> Adapt to [and lead] market trends and opportunities to ensure Cumbria attracts new and repeat visitors</p>	<p><b>2A:</b> Enhance and expand the opportunities and capabilities for convenient, low carbon visitor movement and experience/s both into and inside Cumbria for benefit of visitors, residents, and workers</p> <p><b>2B:</b> Promote and support sustainable and active travel and experiences by visitors</p> <p><b>2C:</b> Increase the local social and economic impact from visitor spend supporting the vibrancy of our villages, towns, and city</p> <p><b>2D:</b> Encourage, educate, and engage visitors in responsible tourism, protecting and valuing our environment and communities</p> <p><b>2E:</b> Ensure Cumbria’s infrastructure and welcome is accessible to all</p> <p><b>2F:</b> Actively monitor and manage visitor pressure on key tourism destinations</p>	<p><b>3A:</b> Develop better infrastructure and attract investment in the quality and range of product</p> <p><b>3B:</b> Attract, retain, and develop a skilled and committed workforce</p> <p><b>3C:</b> Support businesses to move to low carbon operations</p> <p><b>3D:</b> Support businesses to adapt, innovate and achieve excellence</p> <p><b>3E:</b> Ensure digital connectivity fit for the future</p> <p><b>3F:</b> Ensure provision of adequate and consistent visitor services across Cumbria</p> <p><b>3G:</b> Ensure a joined-up approach to enable a resilient visitor economy</p>
<p><i>All requiring coordinated, evidence-led, targeted and appropriately funded marketing</i></p>	<p><i>All requiring a coordinated approach to the strong use of data, evidence and intelligence gathering with a shared platform available to all to support the joined up strategic visitor</i></p>	

Local Visitor Economy Partnership  
 Recognised by VisitEngland

[www.cumbriatourism.org/DMRfeed](http://www.cumbriatourism.org/DMRfeed)

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## Next steps

Feedback from today (forms or online)

Identify investments and plans that match the objectives

November consultation – **get involved**

**Then.....**

- Using your feedback to review and refine
- Adoption by partners to deliver
- Launch early 2024
- Onus on us all to deliver and monitor
- Cumbria's DMP will be iterative and monitored

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Thank you

Please stay and feedback

Feedback & project proforma can be found at  
[www.cumbriatourism.org/DMP](http://www.cumbriatourism.org/DMP)

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