

REPORT TO EXECUTIVE

PORTFOLIO AREA: ECONOMIC DEVELOPMENT AND ENTERPRISE

Date of Meeting: 21st APRIL 2008

Public

Key Decision: No

Recorded in Forward Plan:

No

Inside Policy Framework

Title: CUMBRIA TOURISM STRATEGY
Report of: Director of Development Services
Report reference: DS.49/08

Summary:

Recommendations:

The Executive is requested to endorse this report and any appropriate comments arising from the Presentation on 21st April, as discussed at this meeting, as the City Council's response to the consultation on the Strategy.

Contact Officer: Catherine Elliot

Ext: 7502

1. BACKGROUND INFORMATION AND OPTIONS

- 1.1 Cumbria Tourism is developing a 10 year strategy for improving the visitor economy in Cumbria and is consulting on a draft until 25th April 2008. Carlisle City Council has been invited to make comments. The Draft Strategy is attached at Appendix 1.
- 1.2 Tourism is one of Cumbria's largest industries having grown by 32% since 1992. The Strategy sets out a vision for development of the industry. It recognises that there have been significant recent changes both locally and globally and identifies new opportunities and priorities.
- 1.3 Indications from the North West Development Agency and Cumbria Vision suggest that the main focus of public funding intervention in the foreseeable future will be to improve the tourism industry's contribution to Cumbria's GVA (Gross Value Added).
- 1.4 Cumbria Tourism believes that the Strategy will deliver this improvement by increasing:
 - Employment opportunities in Cumbria through high quality tourism development
 - The number of businesses operating in the visitor economy in Cumbria
 - Skills levels across all levels of employment in tourism
 - Innovation and investment in the latest technologies.

In addition it will help to reduce:

- Levels of economic inactivity
- Dependency on declining industries.

2. Impact for Carlisle

- 2.1 In general terms the issues, challenges and proposed improvements identified in the Strategy are comprehensive, relevant and in the main realistic. The central themes of better quality, improved product and infrastructure, and better co-operation and co-ordination between key bodies and organisations are to be welcomed. A clearer demonstration of the linkage between this strategy and other relevant strategies and regeneration programmes would also be welcome.
- 2.2 However, with specific reference to Carlisle's ambitions as a successful visitor destination there is a disappointing lack of emphasis, and reference to the following aspects:-

(i) Hadrian's Wall

Hadrian's Wall is identified within the Strategy for Tourism in England's Northwest 2003 – 2010 as one of the region's six 'signature' projects. These are intended to be delivered as 'major' capital projects that will have a transformational impact on the visitor economy. They will have 'an international and national significance'. The requirements for NWDA signature projects include:

- ☐ Substantial capital spend (in excess of £50 million for regional signature projects and £15 million for sub-regional signature projects)
- ☐ Action to build and reinforce an attack brand
- ☐ The creation of a unique, highly attractive sense of place
- ☐ A transformational impact on the visitor economy around them

Current regional signature projects (as set out in the above Strategy) include:

- The Renaissance of the Lake District, including Lowther
- Chester Super Zoo
- Blackpool's revival
- Hadrian's Wall
- Mersey Waterfront
- The Regional Casino

Cumbria Tourism is already working closely with Hadrian's Wall Heritage Ltd and Carlisle City Council on developing and raising awareness of the 'Carlisle and Hadrian's Wall Country' brand.

It is also supporting proposals for the improvement of Carlisle's interpretation of its Roman heritage. Given also that Carlisle Renaissance is the ideal vehicle to promote and embrace this signature project the Strategy should make a more positive and specific reference to the development of the Carlisle and Hadrian's Wall brand and product.

(ii) **Business Tourism**

The lack of reference, and intrinsic lack of priority implied within the Strategy for business tourism is disappointing and unacceptable. Business Tourism is clearly identified in the NWDA's Tourism Strategy and Marketing and Communications Strategy as a regional priority. In addition the Business Tourism Framework for England's Northwest document identifies the 'preparation of a Business Tourism Action Plan for each sub region' as a priority for 'tourist boards'. This Plan must identify 'the best prospects for high 'value added' and co-ordinated action to realise the potential' of the sub region. The Strategy should therefore make a commitment to achieving this task. However Business Tourism does not appear in any meaningful way in the 'challenges' boxes or proposals sections. It is not clear how Cumbria Tourism see the future promotion and delivery of this important growth area. The challenge of how this is to be done should most definitely be included. Clarifying the future role of CT in developing business tourism countywide, along with that of the existing conference desks should also be identified as one of the 'challenges' in the strategy. The overall value and importance of business tourism should also be properly acknowledged.

(iii) **Events**

The need to develop attractive sub-regional events is acknowledged but there is still no positive guidance on how a programme of key events can be developed, established and sustained. A more definitive policy is needed to enable private and sector organisations to work together to establish an annual programme of Cumbria 'signature events'. Cumbria Tourism in association with NWDA should act as the 'arbitrators' on which events are deemed to fulfil the necessary criteria to become attractive enough to appeal to a national audience. The Tourism Manager has made this point previously through the Destination Management Plan formulation process, as follows:

'I strongly believe Cumbria Tourism through the Destination Management Plan should establish a recognised hierarchy of county events. A number of existing events should be selected on their merits as being potential 'winners' in terms of being able to be developed into nationally profiled annual 'Cumbrian events'. They should be representative of all the geographic areas of the county and cover all seasons e.g. Maritime Festival/West Coast - Summer; Christmas Festival/Carlisle – Winter; Food and Drink Festival/Lake District –

Spring; etc., etc. These should then receive full Cumbria Tourism/NWDA support in terms of development funding and marketing back up to become true iconic events for Cumbria. This approach will make the best use of resources and spread economic benefits throughout the county.

It also has the added advantage of not only marketing Cumbria as a whole, but raising awareness of its constituent destinations as well'.

(iv) **Improved Attractions**

The improvement of the product requires improvement to the county's attractions in order to keep pace with the changing tastes and interests of a much more discerning public. However, a 'scatter gun' approach of endorsing universal improvement to attractions is not the best use of the resources available. It could be said that the wide spread approvals given for improvement schemes post 'foot and mouth' diluted the beneficial affect of the allocated funding. A more sophisticated approach is required to identify which attractions have the best potential for increasing visitors to the region, and then facilitate funding and support for their improvement. There must be lessons to be learnt from the past, examining the types of improvements funded previously and ascertain which improvements have produced the best return in terms of increased footfall/revenue. This research can be used to formulate a policy/guidelines on future improvements to attractions.

(v) **Rail Services**

In Section 2.4 the opportunities afforded by 'many hitherto undiscovered rural areas of Cumbria' is quite rightly referred to. The potential and value of the existing scenic railways – Cumbria Coast line, Tyne Valley line and Settle-Carlisle line should be mentioned here. It could be argued that they have far more potential benefit for the visitor economy than the Ravenglass Eskdale railway which is mentioned.

The rail services mentioned above are featured (quite rightly) in the Traffic Management and Transport Improvements section (Page 20) but they should also be in Section 2.4 to emphasise their importance. The Settle Carlisle line is another 'winner' for Cumbria's visitor economy. It is an internationally

known brand and its significance again needs recognition in the strategy in order to foster further support for its continued success.

3. CONSULTATION

3.1 Consultation to Date.

An informal presentation for Members of the Executive and Infrastructure Overview and Scrutiny Committee was held on 17th April 2008. The comments made at that session will be reported to the Executive at the meeting on 21st April.

3.2 Consultation proposed.

4. RECOMMENDATIONS

4.1 The Executive is requested to endorse this report and any appropriate comments arising from the Presentation on 21st April, as discussed at this meeting, as the City Council's response to the consultation.

5. REASONS FOR RECOMMENDATIONS

5.1 To ensure that the City Council's views are taken into account in the final Cumbria Tourism Strategy.

6. IMPLICATIONS

- Staffing/Resources – The Strategy has the potential to bring resources into Carlisle to support tourism activities
- Financial – none
- Legal – none
- Corporate – The City Council is in discussions with Cumbria Tourism, Hadrian's Wall Heritage Ltd and North West Development Agency to improve joint working
- Risk Management – There is a risk that opportunities in Carlisle will be missed if the Strategy is not strengthened as suggested
- Equality and Disability – n/a

- Environmental – n/a
- Crime and Disorder – n/a
- Impact on Customers – Improvements to Carlisle as a visitor destination have a beneficial impact on customers

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

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

PRODUCED IN PARTNERSHIP BY CUMBRIA TOURISM

Contents

Foreword	3
Background and Introduction	4
A wealth of Attributes and Opportunities	
• Precious Lakes and Mountains	6
• Heritage Culture and Traditions	8
• A cross for business and place to live and work	8
• Undiscovered Cumbria Coastline and rural retreats	9
• Marketing, Brands and Visitor Information	10
• The Importance of Accommodation and Quality Improvement	11
• Going Greener	12
• Of course we all know tourism is a problem	13
The Next 10 Years	
• A Vision of 2017	14
• Improving the Quality of the Visitor Experience	15
• Development and Investment	17
• Market Development and Communications	20
• Clear Strategy, Leadership and Roles	23
Policy to Action	
• Volume and Value Growth	24
• Vigorous Marketing	24
• Business Performance	25
• Environmental Performance	25
• Sustaining Communities	25
What next?	26
Appendices	26

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 perhaps 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 American 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 strategy 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. Cumbria's tourism industry has created a strong foundation, in terms of rural based leisure tourism, outperforming every tourism destination in England. But this isn't a time to sit back and bask in the glow of past success. Today the world is the visitor's oyster and we need the grit and determination to be able to take our share of an increasingly dynamic and valuable international market.

We hope this draft strategy document will spark a fresh debate and we invite you all to contribute to it. We don't have all the answers but, as has been proven in the last ten years, at least we know how to ask the right questions.

**Eric Robson, Chairman
Cumbria Tourism**

1. Background and Introduction

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

Let's start as we mean to go on and have a bit of plain speaking. 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.

I know, you get dozens of strategies and visions in the post every week – most of them a bland confection of platitudes and hope over experience. But this is the one you really should read. Because if you don't, you'll have to say in years to come 'I wish I had'.

This draft Strategy Paper aims to set 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 will try 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. If you want to immerse yourself in the full list you can find it packaged as **Appendix One**.

If not, read on.

The bottom line is that tourism is one of Cumbria's largest industries having grown by 32% since 1992. We don't want to put you off at this early stage in the proceedings by bombarding you with statistics so we've provided a summary of key facts for you as **Appendix Two**. In the meantime, though, to understand the importance of the visitor economy here you need to know that tourism contributed £1.1 billion to the Cumbrian economy in 2006, that's 18% of the County's spending (GDP) and supported more than 36,000 people which is the equivalent of 21,300 full time jobs. Tourism's contribution to the county economy is predicted to rise to £1.5 billion by 2017.

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 21st 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. 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 priority activities:

- **Further extending the season by developing relevant new and improved ranges of products and a stronger cultural tourism offer.**
- **Spreading the benefits of tourism around Cumbria and accelerating investment in the renaissance and regeneration programmes in Carlisle, Barrow, West Cumbria, Kendal and the key centres in the Lake District.**
- **Focussing on high value added and growth markets which exploit Cumbria's excellent food and drink reputation, cultural traditions and opportunities for healthy outdoor activities.**
- **Greater public investment in the Lake District, the UK's most important National Park.**
- **Infrastructure investment in roads, public transport, car parks, toilets and town centres. The challenge for public agencies and local authorities is how they will be able to fund such improved visitor facilities at a time of tightly controlled public expenditure.**
- **Addressing the need to improve management of the environment in partnership with public agencies and the private sector. This needs to be done with particular reference to the fragile state of upland farming and the vital role of the farming community in managing and protecting the landscapes that are at the heart of our tourism offering.**

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 Lakeland 'honeypots' 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.

2. 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 Tavanach, 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 – already a Green Globe destination - 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.

We’ve already received many consultation responses to our initial strategy discussions – some more controversial than others and not all of which we support but we list a few of them here which give a flavour of the debate so far.

Challenges

- *Can the key public agencies (Lake District National Park Authority, South Lakeland District Council and Cumbria County Council) collaborate to implement the Windermere & Bowness masterplan, and extend regeneration and repositioning of Windermere’s tourism offering to the entire Lake catchment area?*
- *Can Local Authorities attract sufficient resources to support the public realm improvements needed in towns and villages throughout Cumbria and the Lake District?*
- *Will the Transport Authority investigate a fixed track tram or narrow gauge railway linking Windermere/Ambleside and Keswick?*
- *Can the Lake District Partnership make the case for improved quality (perhaps low carbon) public transport services through the UK’s favourite National Park including energy efficient buses, water taxi services and other innovative forms of transport?*

Challenges continued

- ***How will the West Cumbria Masterplan take forward their case to create a cable car access to Skiddaw?***
- ***Can the Lake District National Park Authority create a network of off road cycle tracks for the circumnavigation of Windermere, Derwentwater, Conistone and Bassenthwaite?***
- ***Will the new Local Development Framework allow the development and extension of new retail opportunities in the key Lake District visitor centres?***

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.

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.

Challenges

- **Can resources be found to grow visitor attendance at Cumbria's major cultural events and festivals?**
- **How can we all support the Wordsworth Trust in their ambition to create an international centre for the Romantic Movement in Grasmere?**
- **Can the outdoor industry collaborate to create a Cumbria Adventure clearing house that will make it as easy to book adventure packages, including travel, to Cumbria and the Lake District as it is to book a package holiday to Spain?**

2.3 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. 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.

Challenges

- ***How can Cumbria County Council, SLDC and Eden DC help make the case to improve the quality of public transport hubs, especially the gateway railway stations at Oxenholme and Penrith, including improvements to visitor information?***
- ***How can we strengthen the lobby to improve the Oxenholme -Windermere railway services to connect with main line trains which will encourage greater rail use into the heart of the Lake District. Similarly, can more support be given to the restoration of the Cockermouth, Keswick and Penrith railway?***
- ***Can our planners help to encourage park and ride schemes with organisations like the Lakeside and Haverthwaite Railway which deliver hundreds of visitors minus their cars into central Lakeland?***
- ***How can Cumbria Inward Investment, Furness Enterprise, West Cumbria Development Agency, CREA and Carlisle Renaissance persuade developers to invest in new high quality hotels and attract international hotel chains?***

2.4 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 areas, off the beaten track, 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.

Challenges

- ***Can our planners identify and promote the opportunity to create new holiday villages in Furness, in the Solway AONB and in Rural Carlisle and new golf courses (possibly in conjunction with new holiday villages) especially in Carlisle and West Cumbria?***
- ***Caravan and camping businesses and planners should agree a comprehensive improvement programme for sites throughout the county catering for static and touring caravans and tents.***
- ***Development and leisure opportunities associated with the re construction of the Lancaster Canal in Kendal and hinterland should be promoted by South Lakeland DC and Cumbria Inward Investment.***
- ***Public bodies, private enterprise and charities such as the National Trust need to invest in the retail aspects of cultural, sports and environmental visitor attractions in sympathetic and innovative ways even in more isolated areas.***
- ***Where possible the Rural Development Programme for England (RDPE), Cumbria Rural Enterprise Agency and ADAS should identify opportunities for farmers to diversify into the visitor economy, building on the success of the farm tourism scheme, but the lessons of the aftermath of foot and mouth should be noted; particularly the danger of saturating and destabilising local markets.***

2.5 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, 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.

Challenges

- ***We should investigate the viability and location of six new purpose built world class visitor 'inspiration' centres in key strategic locations offering state of the art visitor information, local cultural heritage interpretation, retail space and high quality local food and drink, This should be operated by a newly established public/private sector partnership.***
- ***Local Authorities working in collaboration with others need to introduce 24 hour high technology information systems throughout the County, especially in the busier visitor centres, integrating transport, accommodation and local attraction information.***
- ***Business Link, the Chamber of Commerce and CT must engage Cumbria's faltering retail industry to convince them of the need for marketing and improved standards of service. Retail and accommodation providers should be encouraged to support an extended season and Sunday trading.***
- ***Cumbria's economic development agencies should collaborate to develop our distinctive food and drink sector, supporting farmers markets, local food festivals and the profile of local farm produce restaurants and cafes; also to investigate a food and drink ambassador's award, which could be an entry level into the annual BBC National Food & Farming Awards.***

2.6 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.

Challenges

- ***Planners, in particular the LDNPA, should encourage the development of six new 4 star destination hotels with world class facilities in premier locations across Cumbria including the Lake District National Park, Carlisle and West Cumbria.***
- ***Businesses should be supported and encouraged to undertake major reinvestment work at Cumbria's landmark hotels***
- ***Cumbria Tourism must continue to drive up quality standards by working in partnership with local authorities to only promote independently quality assessed accommodation and attractions.***

2.7 Going greener

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.

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.

Challenges

- ***Can Cumbria's politicians and entrepreneurs establish the county as the greenest, cleanest and safest UK holiday destination?***
- ***CT and businesses must communicate Cumbria's green credentials more vigorously through green and responsible tourism accreditation, non-car travel and transport improvements***
- ***CT and businesses should promote unique local products, especially food and drink and encourage cooperative niche market farming ventures which will allow continuity of supply within the local area.***
- ***We must explore how can it be made easier for businesses to access grant aid for improving energy efficiency and the use of renewable energy sources?***
- ***How can local authorities work better with businesses to reduce the impact of waste created by visitors?***

2.8 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, a statement that fails to recognise that for migrant workers, tourism employment is much appreciated work and offers a far higher quality of life than they could expect in their country of origin. Tourism also 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.

In a county-wide industry with 5,000 businesses and more than 36,000 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.

Challenges

- **All economic development agencies in Cumbria should encourage more tourism businesses to sign up with the Tourism and Conservation Partnership and also promote the partnership in our environmental marketing message.**
- **People 1st, Connexions Cumbria and CT should publicise examples of young workers in the industry setting up their own successful businesses.**
- **The Local Enterprise Agencies should help publicise and support new visitor dependent businesses that have been established in the expanding tourism areas beyond the Lake District.**
- **Businesses should use this strategy to lobby Parish, District and County Councillors to gain political commitment to improve tourism in Cumbria.**

3. The Next Ten Years

After as good and well-dressed a dinner, at Robert Newton's, as a man could wish, we set out to surmount the steep ascent of Helm Crag; but the dinner was so cheap, I must mention what it consisted of:

Roast pike, stuffed

A boiled fowl

Veal cutlets and ham

Beans and bacon

Cabbage

Pease and potatoes

Anchovy sauce

Parsley and butter

Plain butter

Butter and cheese

Wheat bread and oatcake

Three cups of preserved gooseberries, with a bowl of rich cream in the centre:

All for two people at ten-pence a head.

Joseph Budworth

A Fortnight's Ramble to the Lakes 1810

3.1 A Vision of 2017

And that's the essence of it. What we need is thousands of customers as happy as Joseph Budworth was in 1810.

In 2017 Cumbria -The Lake District will have an unrivalled reputation for its high-quality landscape, accommodation, attractions, public realm, heritage and culture. It will be known for its exceptional customer service, and a year-round programme of activities and events centred on the area's unique culture and natural environment.

The benefits of tourism generated by the county's strongest brands will embrace all parts of the County and there will be effective targeted promotional campaigns bringing new visitors to Cumbria throughout the calendar year. Hadrian's Wall and other key 'cross boundary' brands (e.g. Yorkshire Dales and the North Pennines) and Cumbria's new tourism destinations such as West Cumbria and Furness will have a range of new and

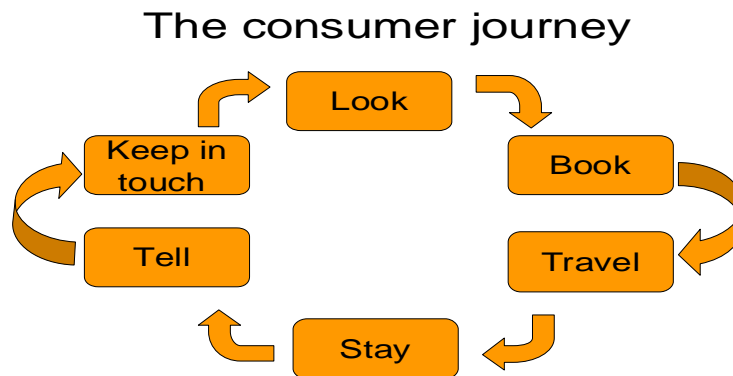
upgraded accommodation and attractions and therefore stronger marketing support.

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:

Improving the Quality of the Visitor Experience

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. 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.

Improving profits through Accommodation Quality

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. 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. Several organisations such as CREA and Enworks can provide a broad range of advice and support in these matters. Through these, 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.

Challenges

- ***CT and businesses must continually upgrade and make the case for customer service improvement support***
- ***Economic development bodies and Local Authorities should improve support structures for start up visitor dependent businesses, especially in areas outside the National Parks***
- ***Parish Council, Voluntary Action Cumbria and the Local Authorities should work with businesses to help all employees including migrant workers integrate with local communities. Tourism businesses must continue to invest in good quality, long term employment opportunities***

3.2.2 PRIORITY TWO: *Development and Investment*

New and Improved Tourism Product

There is 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.

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 accounts for the lion's 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.

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.

Challenges

- ***CT should encourage and incentivise innovation in tourism businesses and demonstrate the benefits of investment in tourism***
- ***Local Authorities and the National Park Authority should make it as easy as possible for businesses and visitors to be greener and celebrate our wonderful environment.***

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
- West Cumbria Spatial Masterplan
- Barrow Regeneration
- Carlisle Renaissance
- Hadrian's Wall Heritage Ltd
- Kendal Regeneration
- Rural Development Programme for England
- North West Operational Programme (NWOP); European Funding Programmes

Major Visitor Economy Development Projects in Cumbria 2008 - 2018



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.

Challenges

- ***County and Regional economic development agencies need to proactively seek inward investment and new tourism business formation to improve productivity in the tourism industry.***
- ***People 1st, LSC, the UoC, other Universities and Colleges need to provide for industry relevant business support and encourage improved skills throughout the tourism industry.***
- ***A north Cumbria office for Cumbria Tourism should be established to enhance capability and capacity ensuring integration and consistency of tourism marketing and development in Cumbria.***
- ***An early priority should be the establishment of clear tourism development opportunities in the Local Development Framework plans in Cumbria.***

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.

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.

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.

Challenges

- ***CT should lobby for improved rail services especially on the West Coast main line***
- ***CT should support local rail user groups in lobbying for improvements e.g. re-branding of the Cumbrian coastal railway, building on the experience of Hadrian's Wall Heritage in securing a re-branding of the Tyne Valley line now called The Hadrian Line.***
- ***Port Authorities need to improve berthing services at Cumbrian ports and CT should capitalise on the potential for sailing tourism in collaboration with other destinations around the Irish Sea.***
- ***Providers of car parking in Cumbria must collaborate more and improve the vital service they provide for visitors.***

3.2.3 PRIORITY THREE:

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.

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

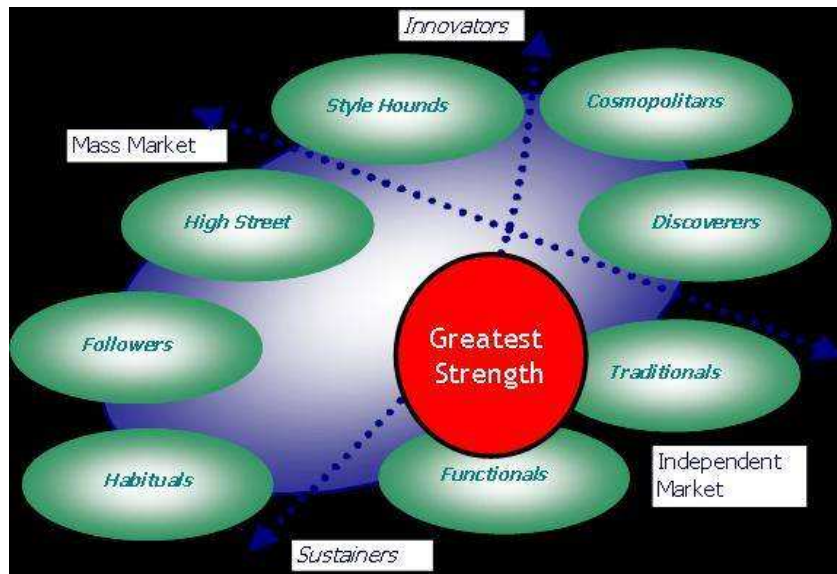
Research undertaken by Cumbria Tourism and the Northwest Regional Development Agency has provided a rich understanding of the nature of visitors to the county. Segmentation is the industry buzz word but essentially it simply means working out what sort of people choose to come here and why. The main 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 VisitBritain¹. 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



¹ 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.

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***

The key themes we'll concentrate on as the drivers of this strategy 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***

Challenges

- ***How can the marketing by VisitBritain, England's North Country and the NWDA be more effective in delivering overseas visitors to Cumbria?***
- ***How can CT expand its effective private and public partnership working on destination and product marketing?***
- ***All Cumbrian partners should harness the positive reputation of the Lake District brand to improve the appeal of Cumbria for other sectors e.g. education, business tourism and the cruise market.***

3.2.4 PRIORITY FOUR:

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, in particular the Local Authorities, National Park Authorities, Hadrian's Wall Heritage Ltd and the development 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. Working with other partners, Cumbria Tourism will take the lead in gathering this intelligence and representing the needs of visitors and of the tourism industry.

Challenges

- ***Businesses should use this strategy to lobby Parish, District and County Councillors to generate the political commitment which will be vital if tourism in Cumbria is to deliver its true potential.***
- ***CT and the Local Authorities should seek to establish clear tourism development opportunities and ensure they are embedded in the Local Development Framework plans in Cumbria.***
- ***All involved in tourism marketing must continue to lobby regional and national bodies to improve the exposure of Cumbria's tourism brands in Government funded marketing campaigns***
- ***The LDNPA, Local and County Councils must improve joint working to improve efficiencies and economies by better partnership and collaboration.***
- ***Cumbria's public bodies and the industry must jointly lobby regional and national bodies to improve public transport for visitors***
- ***CT along with the NWDA and VB must lobby Government to have regard for the visitor economy in the new Performance Framework for Local Authorities and Local Authority Partnerships.***
- ***The University of Cumbria must acknowledge the importance of the County's tourism industry and the potential for tourism-related courses.***

4. 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 13th, 1855

Its 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 previous sections have set 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 in this strategy. 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.

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 2017 (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 2017 (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 21,322 to 26,500 by 2017

(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 help the regeneration of Cumbria and the Lake District by improving the quality and productivity of existing businesses and 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 2017.
- 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 to 80%

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 of assessed tourism businesses by 2017
- 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.

TARGETS

- 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 thank you for being involved in this, the latest, discussion about the industry's future.

Over a 6 week period ending on the 18th April 2008 comments and further suggestions are invited on this proposed strategy to develop Cumbria's visitor economy over the next ten years. Please comment by email to rgreenwood@cumbriatourism.org or by post to:

Richard Greenwood
Cumbria Tourism Strategy Consultation
c/o Cumbria Tourism
Windermere Road
Staveley
Kendal
Cumbria
LA8 9PL

6. APPENDICES

1. **References and Research Sources**
2. **A Summary of Cumbria Tourism Statistics**
3. **Strategy Summary Table - Who Does What?**
4. **Strategy Summary – Targets and Measurement**

Appendix One

References

VisitBritain's UK Tourism Strategy – Tomorrow's Tourism (1999),
(Revised/Updated) Tomorrow's Tourism Today (2004), DCMS
National Skills Strategy: Raising the Bar (People 1st, 2006)
Leitch Review of Skills (Final Report, Dec 2006)
NWDA - A Strategy for Tourism in England's northwest 2003-2010, (revised 2007)
NWDA - Outdoor Sector Mapping and Action Plan, (Tribal) 2007
NWDA - Marketing and the Natural Environment Project, 2007
NWDA - Sustainable Tourism – It's Good for Business, June 2007
NWDA - Business Tourism Strategy, 2007
NWDA - Visitor Information Strategy (draft), 2007
NWDA - Day and Leisure Visits Study, 2007
NWDA - Measurement of the Public Realm - Cumbria Pilot Study
NWDA – Climate Change and the Visitor Economy, SNW, 2006
Cumbria Tourism - Cumbria's Destination Management Plan, 2007/8
Cumbria Tourism - Cumbria Non-Visitor Survey, (Arkenford) 2007
Cumbria Tourism - Cumbria Tourism Market Forecast 2007 Update
Cumbria Tourism – Visitor Information Strategy, 2005
Cumbria Strategic Partnership - Sustainable Cumbria 2004-2024
Cumbria Vision – Hotel/Service Accommodation in Cumbria Study
Cumbria Vision - Conference Study (draft), 2007
Cumbria Vision - Creative Industries Strategy, 2006
Cumbria Vision - Desire Lines, 2006
Cumbria Vision - Adventure Capital Strategy, 2007
Cumbria Vision – Cumbria Economic Regional Action Plan, 2006
Cumbria Vision – Cumbria Economic Plan (draft), 2007
Cumbria Visitor Parking Study – Cumbria Tourism, 2007
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 – West Cumbria Masterplan (draft), 2007
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 – Summary of Cumbria Tourism Statistics

2006		Allerdale	Barrow	Carlisle	Copeland	Eden	South Lakeland	Cumbria
Bedspace	Total	20,075	1,641	5,994	6,962	32,303	40,003	106,978
	% serviced	30	82	56	30	13	34	29
Tourist Numbers (000's)	Total	2,516	1,875.90	2,405.61	1,786.74	1,935	4,651	15,170.60
Tourist Days (000's)	Total	5,306.6	2,265.56	3,227.68	2,843.66	4,039.3	9,832.1	27,514.95
	In visitor accommodation	3,426.3	290.26	960.77	1,201.37	2,648.5	6,853.1	15,380.37
	At friends/relatives	354.1	322.78	386.81	262.90	194.1	378.4	1899.07
	Day visitors	1,526.2	1,652.52	1,880.10	1,379.40	1,196.6	2,600.7	10,235.52
Expenditure (£'s millions)	Total	194.70	58.81	120.01	89.61	142.96	467.78	1073.87
	Direct	146.63	44.45	90.79	67.09	107.45	354.12	810.6
	Indirect	48.07	14.36	29.21	22.52	35.51	113.67	263.34
Employment (FTE's)	Total	4,136	1,102	2,206	2,148	3,095	8,635	21,322
	Direct	3,458	899	1,794	1,830	2,594	7,032	17,607
	Indirect	678	203	412	318	501	1,603	3,715

Source: STEAM 2006, other than bedspace figures which are from CT DMS files (April 2007)

Expenditure Per Person Per Day		
	Day Visitors	Staying Visitors
Accommodation (estimated cost per person per night)	-	25.53
Travel in and around the area today	5.78	3.74
Food & drink	6.55	7.90
Attractions	2.57	1.93
Other leisure and recreation	0.63	0.53
Shopping for daily needs	1.55	1.06
Shopping, gifts & souvenirs	3.00	2.56
Other expenses	0.82	0.83
Total	18.78	41.01

Source: Cumbria Visitor Survey 2006

ATTRACTION	VISITOR NUMBERS 2006
Windermere Lake Cruises	1,267,066
Rheged	463,708
Tullie House Museum and Art Gallery	270,766
Grizedale Forest Park and Visitor Centre	250,000
Ullswater Steamers	187,656
Whinlatter Forest Park & Visitor Centre	180,985
Carlisle Cathedral	149,762
Ravenglass & Eskdale Railway	118,517
Lake District Visitor Centre - Brockhole	91,715
Cumberland Pencil Museum	83,400
Muncaster	82,639
The Dock Museum	79,415
The Homes of Football	68,000
Dove Cottage and The Wordsworth Museum	66,094
Sizergh Castle and Garden	65,062
Hill Top	64,584
The Teapottery	62,854
Northern Lights Gallery	60,000
Wetheriggs Country Pottery	50,000
Lake District Coast Aquarium Maryport	47,464

Source: Cumbria Tourism's Visitor Attractions Monitor (excludes non participating attractions)

Total Expenditure	£1073.9 (m)
Category of Spending	%
Accommodation	26
Food and drink	16
Recreation	5
Shopping	8
Transport	10
Indirect Expenditure	25
VAT	11
Total	100

Source: STEAM 2006

Accommodation Type	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	2006 Average
Serviced (bedspace occupancy %)	25	37	35	50	49	53	59	63	58	52	37	35	47
Self-catering (bedspace occupancy %)	20	29	24	50	39	44	56	74	48	47	24	32	42
Touring Caravan and Camping touring (pitch occupancy %)	13	16	24	53	48	56	66	72	52	35	27	23	54*

Source: Cumbria Tourism's accommodation occupancy survey (Serviced, Self-

DISTRICT	Serviced Accommodation		
	Establishments	Rooms	Bedspaces
ALLERDALE	382	3,046	6,043
BARROW-IN-FURNESS	54	678	1,344
CARLISLE	151	1,594	3,329
COPELAND	109	1,051	2,090
EDEN	351	2,123	4,337
SOUTH LAKELAND	827	6,625	13,539
Lake District National Park	910	7,619	15,559
CUMBRIA COUNTY	1,874	15,117	30,682

catering, and Caravan and Camping (touring). *Based on the seven months between April and October

Accommodation Stock – Cumbria 2006

Source: STEAM 2006

DISTRICT	Non Serviced Accommodation			
	Total Bedspaces	Houses, Cottages, Flats, Static Caravans, Chalets & Boat Moorings	Touring Caravans & Camping	Alternative (including Hostels, Camping Barns, etc)
		Units	Units/Pitches	Properties
ALLERDALE	14,032	1,497	2,078	23
BARROW-IN-FURNESS	297	6	90	0
CARLISLE	2,665	133	610	7
COPELAND	4,872	500	831	11
EDEN	27,966	865	7,649	21
SOUTH LAKELAND	26,464	3,211	3,394	35
Lake District National Park	37,136	3,642	5,972	54
CUMBRIA COUNTY	76,296	6,212	14,652	97

Source: STEAM 2006

Michelle Armstrong, Research Executive, Cumbria Tourism.
Tel: 015398 22222 email marmstrong@cumbriatourism.org

Appendix 3: Strategy Summary Table: Who does what

		Strategic Priority	Main Headings	Sub Headings	CT Lead	Lead Organisation	NWDA Lead	County Strategic Partnership	Private sector engagement
S T R A T E G I C P r i o r i t i e s	1	Improving Quality	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 st	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
	2	Development & Investment	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
	3	Market Development & Communications	Acquisition Retention	Destination Marketing	Marketing	CT	NBS/RMF	CSP/CV	CT Marketing working group
				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
	4	Tourism Strategy & Leadership	Targets & Measures	Evaluation research Reporting Business Planning	Executive Board & CEO	CT	JB	CSP	CT Executive Board & CM's Group

Appendix 3: Strategy Summary Table: Who does what

	5	Skills, R&D & Innovation	Schools, Colleges and University	See Cumbria Economic Plan	Industry Services	Cumbria Vision		LSC UoC	CT Industry Services working group
	6	Housing Strategy	Private sector, Affordable	See Cumbria Economic Plan	Development	Cumbria Vision		CCC	CT Development working group
	7	Business Support and Enterprise	Business Link, Invest Cumbria, Premises, Public sector	See Cumbria Economic Plan	Industry Services	Cumbria Vision		BL IiC	CT Industry Services working group
C r o s s C u t t i n g T h e m e s	8	Rural Strategy	Agriculture Access Home working Services + Support	See Cumbria Economic Plan	Development	Cumbria Vision		CCC	CT Development working group
	9	Connectivity	Roads Rail Air Water Sustainable transport ICT	See Cumbria Economic Plan	Development	Cumbria Vision		CCC	CT Development working group
	10	Sustainable Communities Economic + Social Inclusion	Worklessness, Cultural/sporting, migrant workers	See Cumbria Economic Plan	Industry Services	Cumbria Vision		CSP	CT Industry Services working group

Key to Abbreviations

CT – Cumbria Tourism	CCC – Cumbria County Council	LSC – Learning and Skills Council	CBEN – Cumbria Business and Environment Network	BL - Business Link IiC – 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	

Appendix 4: Strategy Summary Table: Targets and Measurement

Strategic Aim	Measures	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 2017	This is based on an 'ambitious' but achievable medium growth scenario	STEAM
	Increase the volume of trips to the county from 15.2 million to 17 million by 2017	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 21,322 to 26,500 by 2017	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	Using VB methodology.	CT Evaluation Research
	Increase value of online bookings by 5% per annum.	Analysis of Destination Management System	CT Evaluation Research
	Improve media recognition of Cumbria by 10%	Equivalent advertising value assessments	CT Evaluation Research
3. To help 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% in 2007 to 37%.		Cumbria Business Survey (CEIP)
	To increase the proportion of accommodation providers with national quality assurance standards from 53% to 80% by 2017 across all categories of accommodation.		National Quality Assurance Scheme data review
	To establish quality standards and targets in other 'non-accommodation' sectors.		National Quality Assurance Scheme and VisitBritain data review
	To maintain and improve success in the Enjoy England awards for Excellence.		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	Perceptions research required to establish baseline	VB and NWDA perceptions studies

Appendix 4: Strategy Summary Table: Targets and Measurement

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.	Tourism and Conservation Partnership	T&CP
	To promote accreditation of environmental performance and deliver a minimum of 250 of assessed tourism businesses by 2017		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.	Climate Change Action Plan	Cumbria Business Survey (CEIP)
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.		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		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.		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		Cumbria Employment Survey (CEIP)