Many parts of Cumbria were devastated by a flood events associated with Storm Desmond (and others) during December 2015. The effects of this lasted well into 2016, with many businesses physically affected by flooding, access issues caused by the loss of bridges and roads, and the perception that the county was effectively closed for business.

In 2016 Cumbria and the Lake District received just over 45 million visitors, made up of 38.8 million day trippers and 6.3 million overnight visitors. Between them, day and staying visitors combined to produce 59.4m tourist days. These visitors brought in £2.72 billion to the region's economy and provided employment for 36,240 full time equivalent (FTE) posts. As many tourism jobs are actually part time, or seasonal, the total number of people in tourism jobs is estimated at 62,316, around 20% of the county's total employment.

Between 2015 and 2016, there was an increase of 4% in tourist days, 5.2% in tourist numbers, and 4.1% in tourism revenue. This builds on increases in both 2013 and 2014.

Much of this increase was due to day, rather than staying visitors. Day visitors increased by 6%, equivalent to an extra 2.2 million visits, and their spend increased by 7.4%, bringing in an extra £100m, to a total of £1.46bn. The number of staying visitor nights increased by 0.5%, and spend grew by 0.4%.

There is, however, a longer-term upward trend in overnight stays, which have grown by 1.2 million visits (or 22.3%) since 2012.

Looking at sectors of expenditure, significant increases were seen in most areas. Revenue from recreational activities grew the most, by 6.1%, followed by shopping (5.8%), and food and drink (5.4%). Accommodation revenues were similar to 2015 levels.

South Lakeland district accounts for the greatest share of tourism revenue at 44%, followed by Carlisle with 18%, Allerdale with 17% and Eden with 11%. The area covered by the Lake District National Park accounts for almost half of the county’s total tourism revenue.

In the eight years between 2009 and 2016, tourism revenue has grown by 31.4% from £2.07bn to £2.72bn (unadjusted). Over the same period, visitor numbers have grown by 10.5% and visitor days by 9.3%. Employment supported by tourism has increased by 8.6%.

Source: Cumbria Tourism (2017) Tourism in Cumbria 2016: Key Facts and Trends

<table>
<thead>
<tr>
<th>% county share</th>
<th>Allerdale</th>
<th>Carlisle</th>
<th>Eden</th>
<th>South Lakeland</th>
<th>Lake District National Park</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tourism Revenue (£m)</td>
<td>16.5%</td>
<td>17.7%</td>
<td>11.4%</td>
<td>44.1%</td>
<td>49.4%</td>
</tr>
<tr>
<td>Tourist Days (m)</td>
<td>17.8%</td>
<td>15.6%</td>
<td>12.5%</td>
<td>40.9%</td>
<td>45.8%</td>
</tr>
<tr>
<td>Tourist Numbers (m)</td>
<td>16.6%</td>
<td>18.6%</td>
<td>10.6%</td>
<td>40.0%</td>
<td>40.8%</td>
</tr>
<tr>
<td>Employment (FTEs)</td>
<td>17.3%</td>
<td>17.1%</td>
<td>11.8%</td>
<td>43.0%</td>
<td>49.7%</td>
</tr>
</tbody>
</table>
Driving UK Tourism

A recent report by Amaris Hospitality reveals latest trends driving UK Tourism:

Tourism is a crucial driver of the UK economy. This success has been underpinned by the strength of UK tourism which has also seen record numbers of international tourism in 2016. A devalued currency has helped the UK attract a record breaking number of visitors during the typically quiet autumn and winter months. This performance has built continued confidence in the sector as the market has remained buoyant into 2017.

Amaris Hospitality convened a panel of hospitality industry experts representing organisations across tourism boards, trade associations, financial institutions, legal and business consultancies, membership organisations, OTAs and hospitality companies, to hear how others see the state of UK tourism and how we can work together to continue to drive growth in 2017 and beyond.

Overall feedback was very positive. Many see multiple opportunities for the sector to connect with new customers, create world class experiences and encourage more people to visit the UK, empowered by new technologies and collaboration on national and local levels. At the same time this optimism was tempered by concerns around Brexit, investment, skills, infrastructure and capacity that threatens to blow the growth of the sector off course.

Five key themes emerged:

- **Opportunity and risk post-Brexit**: with the industry’s reliance on EU migrant workers, and the need for visa and travel reforms to sustain the international tourism market.
- **Experiential**: meeting the needs of a new generation of travellers as well the changing tastes of existing markets. Experience-focused lifestyle trips are becoming increasingly popular. We need to better package the UK’s regional variety of rich cultural experiences in growth sectors such as historical, cultural and food tourism.
- **Digital hospitality**: the need to keep up with, and lead the way in harnessing new technologies to offer visitors a ‘user-centric approach’ though the development of ‘smart destinations’.
- **Open for business**: the need to be better placed to service business conferences, meetings and events, with lack of capacity, facilities and infrastructure seen as barriers to growth.
- **Events**: full potential for events to attract international visitors is yet to be fully utilised. Improvements to the way events are marketed abroad, along with greater collaboration between the events industry and hospitality providers, could bring substantial growth in visitor numbers.


VisitBritain/VisitEngland: Latest Research

**Overseas Visitors**

2014 and 2015 were both record years for inbound tourism, and 2015 was the sixth consecutive year of growth.

2016 became another record year, with visits to the UK up by 3% compared to 2015. Spend was unchanged on 2015. Visits to the North West during 2016 were up on 2015 by 6.2%.

2017 has started well, with a 7% increase in trips during the first quarter, compared to 2016. The forecast for 2017 is for 38.1 million visits, an increase of 4.0% on 2016; and £24.1 billion in visitor spending, an increase of 8.1% on 2016.

**Day Visits**

Day visits have fluctuated slightly in recent years. In 2014, day visits in England fell by -2% in both volume and value compared to 2013.

In 2015 day visits in England fell again compared to 2014 by -4%, although value rose by +3%, leaving volume at 1.3bn and value at £46.4 billion.

In 2016 the volume of day visits in England increased compared to 2015 by +4%.

For the first four months of 2017, the volume of day visits is comparable with 2016, and spend levels are up 3%.

**Domestic Overnight Trips**

According to the Great Britain Tourism Survey, domestic overnight trips were in decline during 2013 and 2014. However, this changed in 2015 and the year ended with trips up 11% on 2014, nights up 10% and spend up by 8%.

During 2016, domestic overnight trips fluctuated compared to 2015. The year ended with trips -3% down on 2015.

This sector has seen increased visitor numbers over the last few years – by 4.7% in 2014, 3.3% in 2015, and 7.2% in 2016 (year on year comparisons).

Cumbria - Top 20 Visitor Attractions 2016 (by visitor numbers).
1. Windermere Lake Cruises with 1,557,386 visitors.
2. The Rheged Centre with 439,815 visitors.
3. Ullswater Steamers with 376,095 visitors.
4. Brockhole – the Lake District Visitor Centre, with 298,022 visitors.
5. Whinlatter Forest Park & Visitor Centre with 219,050 visitors.
7. Ravenglass and Eskdale Railway with 207,375 visitors.
8. Grasmere Gingerbread with an estimated 200,000 visitors.
10. Grizedale Forest Park and Visitor Centre with 176,267 visitors.
11. Carlisle Cathedral with 142,082 visitors.
12. Hill Top (the home of Beatrix Potter) with 114,724 visitors.
13. Theatre By The Lake in Keswick with 109,378 visitors.
15. Wray Castle, with 100,307 visitors.
16. Lakeland Motor Museum with 73,610 visitors.
17. Tree Top Trek, Brockhole with 72,506 visitors.
18. The Dock Museum, with 60,808 visitors.
19. The Puzzling Place, with 47,160 visitors.
20. The Lake District Wildlife Park with 44,691 visitors.

Other notable visitor attractions include South Lakes Wild Animal Park (Safari Zoo), Lakeland, Hayes Garden Centre, Lowther Castle, Lakes Distillery and Derwentwater Launches.

Source: Cumbria Tourism - Visitor Attractions Monitor
(Please note this only includes attractions who provided data for 2016, and gave permission for figures to be published.).

Cumbria Tourist Accommodation Occupancy 2016/7

Occupancy rates for serviced accommodation in Cumbria and the Lake District have been steadily increasing over the last few years. Cumbria was affected by severe flooding events during December 2015, which significantly affected the tourism industry well into 2016. Despite this, 2016 annual average occupancy rates for serviced accommodation were on a par with 2015 overall. June, August and September were particularly strong.

Early figures for the first four months of 2017 show room occupancy rates around four percentage points lower than for the first four months of 2016. April has been particularly good (although Easter timings affect year-on-year comparisons).

Unit occupancy rates for self-catering properties in Cumbria in 2014 ended around 12% up on 2013 figures. This was very significant, as each year since 2008, annual average unit occupancy rates had been in decline. 2015 ended 2% up on the strong performance of 2014, and annual average unit occupancy rates for 2016 were on a par with 2015.

Provisional figures for the first four months of 2017 show unit occupancy rates running nine percentage points up on the first four months of 2016. April unit occupancy has been particularly strong.

Latest occupancy information available here: https://www.cumbriatourism.org/what-we-do/research/
Inbound Markets - Latest Research

VisitEngland/VisitBritain recently published a report into Britain and its competitors to understand the decision making process across key inbound markets. Online interviews were carried out in spring 2016 in 20 countries with people who had either visited Britain, or were considering doing so.

Key findings:

- Half of all visits to Britain were for between 4-7 nights.
- France is the most considered alternative destination to Britain, followed by Germany and Italy for long haul markets, and Ireland for short haul markets.
- Levels of knowledge about Britain are similar to France, but slightly higher for Italy, and especially Germany.
- Long haul markets have stronger knowledge about Britain than short haul, and they claim to have a higher likelihood to visit Britain in the next 5 years than short haul markets.
- Key motivator for travelers to decide on a holiday destination/Britain is cultural attractions. Other top motivations are countryside, good deals, variety of places to visit and the fact that it would be somewhere new.
- Most popular information sources for researching a holiday were search engines, price comparison sites and word of mouth. Travel guidebooks, programmes and agents were influential for long haul markets.
- There is an even split between those who book travel and accommodation separately, or together.
- Most bookings are done online using laptops/desktops, although younger travellers are more likely to use smartphones or tablets.
- Just over half (53%) of accommodation bookings were made directly - the rest via a third party agent or comparison site.
- Even more (62%) of holiday bookings were made via a travel agent, operator, or comparison site. Online travel agencies are used often, with the main motivations being to compare prices (71%) and find something within budget (67%).
- The biggest influence on destination choice globally is word of mouth, with talking to friends and family key for 40% of visitors and considerers.
- Over two thirds (69%) agree that they like to stay connected while on holiday. Three quarters say their smartphone is essential, and 56% say the same for their tablets.

Source: VisitBritain/England (2016) Britain and Competitors

Cumbria Tourism Research Services

- We are the only source of intelligence on tourism in Cumbria, from numbers of accommodation providers, and visits to visitor attractions, to occupancy averages, visitor profiles, and the latest tourism business performance.
- We run monthly occupancy surveys with over 350 accommodation providers each month - anyone can join online for free and receive regular information to benchmark their performance.
- We provide Business Start up Packs tailored to business type and location, and a variety of research reports to inform both new and existing tourism businesses.
- There is a 20% Cumbria Tourism membership discount on all our research reports and services.

For more information on any of the research included in this newsletter please contact Helen Tate on htate@cumbriatourism.org