A DESTINATION MANAGEMENT PLAN FOR CUMBRIA: 2024 to 2030

(Draft: November 2023)

CONTENTS

EXECUTIVE SUMMARY

Cumbria is a top UK visitor destination and place of national and international appeal. It is home to two UNESCO World Heritage Sites – the Lake District and Hadrian's Wall, two National Parks – The Lake District and the Yorkshire Dales and three National Landscapes – Silverdale & Arnside, the Solway Coast and the North Pennines, which is also designated as an UNESCO Global Geopark.

Through this shared Destination Management Plan (DMP), public and private sector partners are seeking to ensure a joined-up approach to support a successful visitor economy for the whole of the county, *supporting economic growth, the natural environment and delivering benefits for our host communities.*

Our vision

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

The vision is long term and will take time to achieve. The **key objectives** and **summary actions** for the next 6 years in this DMP set out below will move Cumbria towards the long-term vision. The plan will be monitored by a Steering Group[1], with regular reviews of progress.

[Note: based on feedback during the consultation**, the actions set out below will be prioritised in terms of short, medium and long term**.]

Principles of the DMP

To support the DMP, all partners support and uphold the following principles:

1. Sustainability will be at the heart of everything we do[2].
2. Our actions will be evidence based, inclusive and equitable, respectful of our communities and of benefit to visitors.
3. Collaborative and solutions focussed.
4. A commitment to maximising our collective resources and expertise and avoiding duplication.

The DMP is ambitious and will require very strong partnership working and the active engagement of a wide range of partners across the public and private sector.

---

[1] Current membership includes: the Managing Director of Cumbria Tourism, Cumberland Council, Westmorland and Furness Council, Cumbria LEP, the LDNPA, the YDNPA, a Hadrian's Wall representative, and CT Board representatives from the private sector

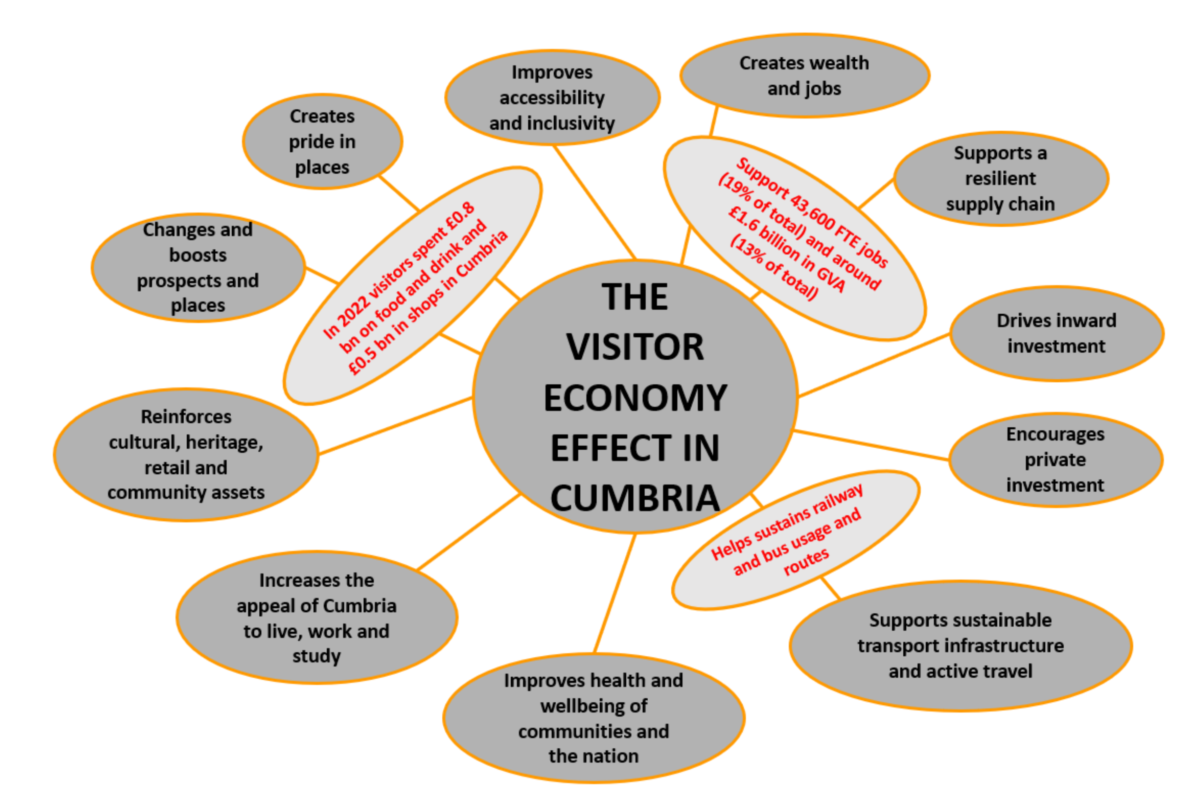
[2] Sustainable tourism is defined by the UN Environment Program and UN World Tourism Organization as "*tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities*". This DMP uses the term sustainability in this broad sense

The role of the visitor economy in Cumbria

Cumbria has a large and important visitor economy. In 2022, the 41 million visitors to Cumbria generated around £4.1 billion of total spend in the economy including multiplier effects. This supports £1.2 billion in direct gross value added (GVA) and overall, an estimated 34,300 jobs directly (FTEs). Taking account of supply chain and multipliers, Cumbria's visitor economy spend supports an estimated 43,600 FTE jobs (19% of the county total) and around £1.6 billion in GVA (13% of the county's total).

As well as providing employment and being of economic importance, the visitor has a wider and significant role to play in **supporting vibrant communities** via place shaping, supporting local authority priorities providing social and community benefits and pride, driving regeneration, creating jobs, underpinning a resilient supply chain, cultural, arts and heritage assets and changing perceptions.

Figure 1: Wider value and role of the visitor economy in Cumbria



Source: CT analysis and data drawn from Appendix B

Key objectives and intended outcomes

The DMP has three key objectives and a series of targets or outcomes by which partners will measure progress for each objective. These are focussed on achieving change by 2030, the key staging post towards the 2040 vision.

OBJECTIVE 1 – DRIVE ECONOMIC GROWTH - INCREASING THE VALUE AND PRODUCTIVITY OF CUMBRIA'S VISITOR ECONOMY

This overarching objective is about **growing the value of the visitor economy** to deliver economic and social benefits by attracting visitors to stay longer, visit less well-known parts and increase visits out of season.

Outcome: *Grow the value of the visitor economy by 2030 up to a third in real terms via:*

1. Increasing the value and share of tourism spend across the **less visited parts** of Cumbria (both day and overnight visitors) – [so increasing the share of visitor spend outside the LDNP area from 47% in 2022 to 54% - growth potential of c. £500 million in total spend effects]
2. Increasing the value of tourism revenue **outside the core period** (April to September) and in shoulder months by [c. 10% bringing seasonality more in line with the national average - growth potential of c. £230 million in total spend effects]
3. Increasing the contribution of **overnights visitors** in total visits and visitor days by increasing number and length of stays [increase share from 43% in 2022, to 47.5% - growth potential of c. £440 million in total spend effects]
4. Increasing the number and share of **international visitors** to reach [15%] of total visitor numbers [note complementary to overnight visitor outcome].

OBJECTIVE 2 – RESPONSIBLE, SUSTAINABLE & INCLUSIVE: SUPPORTING RESPONSIBLE TOURISM, BENEFITTING THE ENVIRONMENT AND VIBRANT COMMUNITIES

The second objective is about positioning Cumbria as a leading sustainable and inclusive tourism destination. This requires managing visitors as they journey to Cumbria and when they are here. It requires businesses to continue to develop plans to enable low carbon and carbon offsetting experiences in ways which inspire, excite and attract.

As a globally leading environmentally responsible destination, we need to promote a culture of understanding of the area to the visitor and so encourage a philosophy of the protection of our natural capital (being the “loved destination”). This applies equally in the most popular destinations in Cumbria and the under visited destinations with the potential for growth.

Being an inclusive destination means being a destination that attracts and caters for all types of visitors which can offer “adventure for everyone.” This requires suitable facilities, movement infrastructure, signage, information and promotion.

Improve the overall sustainability of visitor economy activity by:

1. Supporting the aspiration for Cumbria to be the first **carbon neutral county** by 2037 [carbon reduction target of xx for the visitor economy sector TBC].
2. Improve the sustainability of travel to **get to Cumbria**.
   a. Reduce the number arriving by privately owned vehicles from 91% in 2022 [to 80%]
   b. Of those arriving by private vehicle, increase the share using EV/hybrid from 10% in 2022 to [20%].
3. Improving the sustainability of travel in **getting around Cumbria**.
   a. Reduce main mode of transport used in privately owned petrol vehicles [from 66% in 2022 to [50%]
   b. Increase use of sustainable and active travel options – increase main mode of travel as active and sustainable from 28% in 2022 to [xx TBC%].
   c. Encourage modal shift of visitors once here through provision of adequate car parking.

Improve the overall inclusivity of visitor economy activity by:

4. Increasing **responsible tourism** - managed and monitored through plans led by the Strategic Visitor Management Group.
5. Increasing the proportion of tourism spend **retained in Cumbria** [by xx TBC]
6. Deliver increased **vibrancy and vitality** to Cumbria's city, town, and village centres by enhancing the evening economy, cultural offering (measured by employment growth and food & drink offer in town) and sense of pride in place.
7. Increasing the value of **visitor contributions** to local causes (volunteering and visitor giving) [by xx TBC].
8. Improving Cumbria's reputation as an **accessible destination** and growing the value of the Purple Pound by delivering the Accessible Cumbria Partnership Strategy
9. Working in partnership to increase Cumbria's reputation as an **inclusive destination.**

OBJECTIVE 3 - RESOURCED TO DELIVER: *SUPPORTING THE SECTOR AND ENSURING THE INFRASTRUCTURE TO DELIVER WORLD CLASS EXPERIENCES*

It is not possible to deliver on the DMP's objectives 1 and 2 without a supporting infrastructure that has the capability to deliver world class experiences and a "warm welcome for all." The third objective is about supporting the visitor economy sector to be resilient, to operate effectively and support innovation and productivity in the sector. It addresses the opportunities and challenges in the delivery of services to visitors.

Supporting the sector and the infrastructure needed by:

1. Attracting increased levels of public and private investment in the **visitor infrastructure.**
2. Implementing the **workforce strategy** for the visitor economy to address skills gap and workforce shortage and [reducing by xx TBC %] the number of visitor economy businesses reporting recruitment of staff as a significant problem (was 48% in October 2023)
3. Addressing access to **affordable housing and the housing mix** for staff and [reducing] the number of visitor economy businesses reporting this as a significant problem (was 66% in October 2023)
4. Increasing **innovation** in the sector - the number of Cumbria's tourism businesses who are self-reported "innovation active"
5. Reducing the areas of Cumbria with poor **mobile and 4G/5G** coverage

<table>
<tr><th colspan="3">FIGURE 1: KEY OBJECTIVES, CUMBRIA DMP [DRAFT]</th></tr>
<tr><td>OBJECTIVE 1 – DRIVE ECONOMIC GROWTH: INCREASING THE VALUE AND PRODUCTIVITY OF CUMBRIA'S VISITOR ECONOMY</td><td>OBJECTIVE 2 – RESPONSIBLE, SUSTAINABLE & INCLUSIVE: SUPPORTING RESPONSIBLE TOURISM, BENEFITTING THE ENVIRONMENT AND VIBRANT COMMUNITIES</td><td>OBJECTIVE 3 - RESOURCED TO DELIVER: SUPPORTING THE SECTOR AND ENSURING THE INFRASTRUCTURE TO DELIVER WORLD CLASS EXPERIENCES</td></tr>
<tr><td>1A: Continue to implement strategy to raise appeal and awareness of less well-known parts of the county
1B: Grow the all-season offer and become known as a year-round destination for all
1C: Attract more overnight stays and extend lengths of stay
1D: Regain and grow international spend and other higher value overnight stays
1E: Adapt to [and lead] market trends and opportunities to ensure Cumbria attracts new and repeat visitors</td><td>2A: Enhance and expand the opportunities and capabilities for convenient, low carbon visitor movement and experience/s both into and inside Cumbria for benefit of visitors, residents, and workers
2B: Promote and support sustainable and active travel and experiences by visitors
2C: Increase the local social and economic impact from visitor spend supporting the vibrancy of our villages, towns and city
2D: Encourage, educate and engage visitors in responsible tourism, protecting and valuing our environment and communities
2E: Ensure Cumbria's infrastructure and welcome is accessible to all
2F: Actively monitor and manage visitor pressure on key tourism destinations</td><td>3A: Develop better infrastructure and attract investment in the quality and range of product
3B: Attract, retain and develop a skilled and committed workforce
3C: Support businesses to move to low carbon operations
3D: Support businesses to adapt, innovate and achieve excellence
3E: Ensure digital connectivity fit for the future
3F: Ensure provision of adequate and consistent visitor services across Cumbria
3G: Ensure a joined-up approach to enable a resilient visitor economy</td></tr>
<tr><td>All requiring coordinated, evidence-led, targeted and appropriately funded marketing</td><td colspan="2">All requiring a coordinated approach to the strong use of data, evidence and intelligence gathering with a shared platform available to all to support joined up strategic visitor management</td></tr>
</table>

FIGURE 2: KEY ACTIONS, CUMBRIA DMP [*DRAFT TO BE PRIORITISED FOLLOWING CONSULTATION*]

OBJECTIVE 1 – DRIVE ECONOMIC GROWTH:	OBJECTIVE 2 – RESPONSIBLE, SUSTAINABLE & INCLUSIVE:	OBJECTIVE 3 - RESOURCED TO DELIVER:
1.1: Invest in enhancing the visitor product in under visited locations	2.1: Encourage more visitors to arrive in Cumbria via public transport	3.1: Support business and organisations to access grant and other funding opportunities
1.2: Funded and coordinated marketing and promotion of under visited locations	2.2: Sustain and improve public transport infrastructure and services for visitors & communities	3.2: Help attract external investment into the sector
1.3: Support and extend programme of events and festivals outside peak periods	2.3: Developing a more integrated transport system for visitors, supporting modal shift	3.3: Develop excellence in our affordable accommodation offer for young people
1.4: Development of more wet weather activities and attractions to support tourism in off-peak periods	2.4: Developing a suitable EV charging infrastructure for visitors	3.4: Support skills development within the sector
1.5: Funded and coordinated marketing and promotion of Cumbria in off-peak periods	2.5: A proactive approach to parking provision, traffic management, supporting modal shift in key locations	3.5: Continue to raise awareness of careers and career paths within the sector
1.6: Funded and coordinated marketing and promotion of Cumbria to international markets	2.6: Further expand and develop the network of cycling routes across the county	3.6: Raise awareness of Cumbria as a place to live and work
1.7: Develop a strategic approach to promotion of Cumbria as an inclusive destination	2.7: Planning roadworks to minimise visitor disruption	3.7: Develop and extend worker transport initiatives
1.8: Develop a strategic approach to promotion of Cumbria to film and TV productions	2.8: Place to Plate - Local supply and sourcing programme	3.8: Invest in new and expanded accommodation for workers in the sector
1.9: Develop and implement a Cumbria food strategy	2.9: Responsible tourism education strategy for visitors	3.9: Support tourism business reduce their carbon and wider environmental footprint
1.10: Roll out a Cumbria motorhome strategy and develop the CCR200 concept further	2.10: Schools and young people countryside and environment awareness	3.10: Visitor economy innovation programme
1.11: Develop Cumbria as "the" inclusive rural visitor destination	2.11: Explore potential funding opportunities	3.11: Hospitality school of excellence
1.12: Increase local community awareness and use of visitor facing services	2.12: Better provision of consistent and comprehensive information on accessibility and marketing	3.12: Roll out of high-quality digital connectivity for visitors in all of Cumbria
	2.13 Awareness raising and practical advice about accessibility market and needs	3.13: Carry out an audit and review of key gaps across core visitor services in Cumbria
	2.14: Active destination management in key locations	3.14: A public realm review for key visitor destinations across Cumbria
	2.15: Data sharing and real-time information on visitors	3.15: Review of toilet, waste and parking provision
	2.16: Visitor safety management strategy	3.16: Data sharing and intelligence gathering

1 INTRODUCTION AND BACKGROUND

1.1 WHAT IS A DMP?

Destination management is the process of leading, influencing and coordinating the management of all aspects that contribute to a visitor's experience in Cumbria, taking account of the needs of visitors, communities, businesses and the environment.

This Destination Management Plan (DMP) is the shared strategy and action plan for sustainable tourism in Cumbria. It provides a long-term vision (up to 2040), a collective statement of intent to manage tourism in Cumbria, objectives and a prioritised 6-year action plan within an annual rolling programme of review. It articulates the roles of the different stakeholders responsible for their delivery and identifies clear actions they will lead on and the apportionment of resources.

1.2 OUR DESTINATION

The **jointly owned** DMP has been developed for the **whole of Cumbria**. Within Cumbria, the Lake District is the key internationally known "attack brand" and is where visitor economy activity is most concentrated. However, visitors come to all parts of Cumbria and there are natural links and strong visitor interplay with areas surrounding the Lake District National Park which contain assets and opportunities that are complementary and often under-exploited (such as Cumbria's coast and Hadrian's Wall, Morecambe Bay, and where the Lakes meet the Dales).

1.3 HOW IT HAS BEEN DEVELOPED

This is a jointly developed and owned strategy for the whole of Cumbria and for all organisations and partners - public and private - involved in the management and delivery of services to visitors. There has been comprehensive consultation and input from a huge range of stakeholders. The development of the DMP has been evidence-led, utilising local data and trends, national sentiment surveys as well as best practice from other destinations.

1.4 STRATEGIC ALIGNMENT OF THE DMP

It has been developed to build on, be aligned and contribute to existing national and local strategies (as shown in Table A1, Appendix A). In April 2023, two new unitary authorities were created in Cumbria: Cumberland Council and Westmorland and Furness Council. Both have produced initial plans and are embarking on updating and developing strategies for their areas. This DMP will help shape thinking and investment plans for the councils as part of the shared ambition for a coordinated DMP.

2 HOW CUMBRIA IS PERFORMING

In the final version of the DMP, Appendix B will provide a detailed review of the evidence on Cumbria's visitor economy - past, present and future. It will also map out planned investment that will impact on the visitor economy. The collated evidence will be available on request and the proformas being collated currently will be used to inform the final document.

2.1 KEY MESSAGES

The key messages from this analysis are summarised below:

Volume, value and origin of visitors

1. Cumbria has a large and important visitor economy. In 2022, 41 million visitors generated around £4.1 billion of total spend in the economy including multiplier effects. This supports £1.2 billion in direct GVA and overall, an estimated 34,300 jobs directly (FTEs).
2. Taking account of supply chain and multipliers, visitor economy spend supports an estimated 43,600 FTE jobs (19% of the county total) and around £1.6 billion in GVA (13% of Cumbria's total in 2021).
3. In terms of jobs supported, the visitor economy is the largest source of employment in Cumbria and is one of the key planks of the economy.
4. The relative importance of the visitor economy varies widely across Cumbria and is more important in the Lake District, where there are fewer alternative industries.
5. The visitor economy has still yet to recover to pre-Covid levels.
6. The 8 million overnight visitors in 2022 account for 43% of all tourism days and 54% of all tourism spend. The share of overnight visitors in total days and spend has risen since Covid and overall numbers are up on pre-Covid levels, in part driven by a strong increase in serviced accommodation. Although spend has risen, costs have also risen leading to a squeeze on profitability.
7. Overnight visitors to Cumbria come from across the UK as well as internationally. There is, however, a strong north of England focus. In 2022, two-thirds of all overnight visitors came from either the North West, the North East or Yorkshire and the Humber.
8. The 33 million day visitors in 2022 accounted for 80% of all visitors, 57% of all days, but 46% of all spend. On average spend per day is a third less than overnight visitors. Day visitor numbers remain 16.5% down on pre-Covid levels.
9. As of 2022, international visitors accounted for around 3% of the total, which is significantly below the pre-Covid levels of 10% to 12% but is showing signs of recovery (as it has been nationally).
10. The pattern of visitors in 2022 had shifted compared to pre-Covid, with an increase in the proportion of ethnic minority and younger visitors, as well as visitors from areas closer to Cumbria. It is not clear yet whether this shift will continue into the future.

11. A significant proportion of visitors (14% in 2022) included someone in their group with a health issue or disability.

Nature of visits

12. There is a clear and consistent pattern as to why visitors come to Cumbria: for the landscape (66%) or to be outdoors (65%), as well as the area's peace / beauty / relaxation (60%), for its health and wellbeing benefits for walking (40%), its remoteness and feeling of safety (35%), to go on the water (29%). Broadly the motivations have stayed consistent over time.
13. Within Cumbria, the Lake District National Park (LDNP) accounts for roughly half of tourism activity. In 2022, tourism in the LDNP accounted for an estimated 53% of all spend across Cumbria, 44% of visits and 50% of days.
14. The share of the visitor economy in Cumbria outside the LDNP area has changed over the past decade. Prior to Covid, there was a slight decline in the share of spend, visitors and days occurring outside the LDNP area. However, significant absolute growth in the visitor economy in both the LDNP and the rest of Cumbria. Post-Covid, although there has been a recovery in the Lake District, the rest of Cumbria has seen relatively poor performance.
15. Visitors to Cumbria are concentrated in the perennially popular locations within the core parts of the Lake District (Ambleside/Windermere/Bowness/Grasmere and Keswick, then the lakes Ullswater and Coniston), with towns surrounding the Park making up the next tier of visitor places (Kendal, Penrith, Cockermouth and Grange/Cartmel/Ulverston, Kirkby Lonsdale/Sedbergh/Kirkby Stephen etc).
16. There are many areas of Cumbria with relatively few visitors. Carlisle, the largest settlement in Cumbria, a city with its major castle, museums and heritage, is relatively less visited, as is Hadrian's Wall and the Cumbrian coast.
17. Visitors come to Cumbria all year-round, and there is no closed or entirely off-peak season. However, tourism especially overnight tourism remains seasonally driven by family holiday availability, accommodation availability, the weather and the outdoor focussed nature of many visitors. The seasonality of tourism is particularly pronounced outside the Lake District National Park.
18. A 10% increase in visitor spend in each of the off-peak months and 5% in the shoulder months outside the peak months for spend (July and August) would increase overall spend, based on 2022 figures, by around £255 million or 5%.
19. The vast majority of visitors still come to Cumbria by private vehicle. In 2022, an estimated 91% arrived by private vehicle, up from 86% in 2018 and 81% in 2015 (in part due to the drop in international visitors).
20. Once visitors have arrived in Cumbria, then there are shifts in the modes of travel used. Although private vehicles remain the dominant form of transport (around 90% using car/ van/ motorbike/ motorhome), there is significant level of "active travel" with 57% of visitors travelling around on foot and 9% by bike/e-bike.

The sector and infrastructure

21. The visitor economy sector largely consists of small, independent and local businesses. Cumbria Tourism (CT) provides focus for businesses to come together and work collectively and represents 4,500 member businesses or nearly 20% of the 23,100 businesses across Cumbria in 2022. CT is also the Local Visitor Economy Partnership (LVEP) recognised by Visit England as the lead tourism body for the county and a conduit for visitor economy businesses and locally based associations and partnership.

22. Access to the people and skills necessary to deliver services has been the biggest challenge for visitor economy businesses in Cumbria in recent years, mirroring national challenges across the hospitality sector but being even more acute in Cumbria. The issues in Cumbria, especially in the Lake District National Park, are also connected with transport and housing.

23. Cumbria has had large areas with poor mobile reception and access to digital services due to its rural nature and typography. This is improving with 4G and 5G services being extended and rolled out but remains an issue for the visitor economy (for business and visitors).

24. There are significant investments underway and planned that will provide opportunities for the visitor economy:

    - The dualling of the A66 between Scotch Corner and Penrith, and the Carlisle Southern Relief Road will improve accessibility.
    - There are plans, not yet funded, to improve rails service along the Lakes Line to Windermere and the Coastal Line from Carlisle to Barrow along the West Coast
    - Major investments are planned and, in some cases, underway in many town and city centres supported by Town Deal and Future High Street Fund. A significant part of the planned investments are aimed at improving town centres and developing new facilities and attractions (for the local population and visitors alike).
    - A range of improved visitor trails and cycle ways
    -

2.2 SWOT ANALYSIS

STRENGTHS	OPPORTUNITIES
Assets • Strong brand awareness (especially of the Lake District) and positive brand associations • Unique natural & cultural environment – landscape, coast & two World Heritage Sites, two National Parks and three National Landscapes, etc) • The lakes, tarns, rivers and sea offering opportunities for water activities (sailing, kayaking, wild swimming and paddle boarding) with steamer/ferry services on 4 lakes	**Assets** • Under-visited and exploited Hadrian's' Wall area/Carlisle and sites with historical links • Under-visited and exploited area of coastline/ landscape/western lakes • Under-visited attractions with historical, military and industrial links (from Barrow to Maryport and Carlisle) • Planned investment in visitor facilities and attractions in Millom, Whitehaven and Maryport • Under-used accommodation and facilities outside peak season – opportunity to growing productivity by extending the season via events, etc

STRENGTHS	OPPORTUNITIES
• Space, lack of development, openness, dark skies • Visitors come to Cumbria all year round, there is no closed or entirely off-peak season. • Well positioned in terms of outdoor activities – walking, cycling, water sports - and so "green," health & wellbeing • Breadth and quality of our local food and drink offer • Rich range of cultural assets and attractions – historic houses, archaeological sites, the City of Carlisle, old towns and villages, traditional country and farming shows • Good health & wellbeing attributes benefiting both visitors and communities • High quality hotels & facilities offer • Wide range of accommodation offers and recent upgrade in facilities • Key attractions, internationally and nationally known **Markets** • Loyal and repeat visitors from the UK • Recent attraction of new domestic market segments (especially from relatively local area across the North of England) and increased % of younger audiences • Proximity (in terms of drive times) to large urban conurbations (central belt in Scotland, North East, West Yorkshire and Manchester and Liverpool city-regions) **Sector working and infrastructure** • A flexible and adaptable sector – many small & family businesses • Good cross-sector working and public-private links in the visitor economy • Cohesion through local plan, LDNPA engagement, World Heritage Site organisation, close communities • Base of transport infrastructure to build on	• Extend and improve offer for cycling and other outdoor activities • Linkages to existing and new attractions in surrounding areas (Eden Morecambe, Kielder Forest, Hadrian's Wall Northumberland, Yorkshire Dales, South Scotland forests etc) **Markets** • Returning international markets to the UK • Low levels of visitation from higher earning London/South East markets • Opportunities to increase inclusivity and accessibility (Purple Pound) • Building on health & wellbeing offer – "Natural Health Service" • Build reputation as a low carbon sustainable rural & tourism location • Continue to grow younger market • Strong interest in business investment opportunities by private sector • Eden Project North • Links to staycation & live and work offer • Significant growth in Advanced Manufacturing (BAE Systems/Nuclear) could lead to growth in accommodation demand, business tourism. **Sector working and infrastructure** • Growing the local employment and career offer • Working in partnership to organise and address issues • Experience and capability growth/creation – career and education pathways into visitor economy • Develop lower carbon and lower energy businesses • Improved digital connectivity • Innovation opportunities • Develop Cumbria as a Centre of Excellence for Hospitality Training

<table>
<tr><th>WEAKNESSES</th><th>THREATS</th></tr>
<tr><td>
Markets/visitors

Peripheral market for most international visitors – limited awareness
Poor awareness of ‘Hidden Gems’
Limited visitor numbers to less core places outside the LDNP (e.g., Carlisle) overly concentrated in a few more well-known locations
Recent increased reliance on the North of England as core market for staying visitors
Lack of integrated ticketing, e.g., attractions, transport & parking

Business/sector

Serious staffing shortages
Poor image for careers – low wage & perception of weak career offer
Communication/messaging disparate, lack of one voice for the sector
Businesses with post-Covid damaged balance sheets and with squeezed profitability making it harder to invest.

Facilities

Lack of investment in major transport and infrastructure projects
Poor digital infrastructure in parts of Cumbria, especially more rural areas – digital connectivity issues
Lack of grid infrastructure for EV charge points
Poor public transport offer within parts of the Lakes area and elsewhere in Cumbria (e.g., Eden Valley)
Quality of accessibility offer
Car parking provision in more well-known locations
Heavy visitor usage over years in some locations and facilities leading to degradation and need for re-investment
Limited higher quality accommodation offer in West Cumbria and Barrow area

</td><td>
Markets/visitors

Squeezed UK incomes and cost of living crisis reducing visitors number and/or spend per visit
The right balance of tourism numbers versus sustainable rural landscape management
Global competitive market – we need to be first movers
Shift to more EV owners and limited local charging points
Reliance of car-based visits at odds with desire to promote low carbon tourism

Business/sector

Increasing costs base in term of staff and energy/other costs
Continued labour workforce shortage
Growth of second/holiday homes, Airbnb, property values driving lack of affordable housing for staff
Lack of community support and resistance to development in some places

Facilities

Adverse weather – long term effect of climate change
Local government funding for services
Poor relative digital connectivity as usage and demand from visitors go up

</td></tr>
</table>