

Cumbria Tourism Latest Tourism Research Newsletter

A Confident Start to 2015

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Every six months, Cumbria Tourism carries out a Business Performance Survey with tourism businesses around the county. The most recent of these was at the end of March 2015, covering the six month period from October 2014 to the end of March 2015.

This wave of research showed that the strong performance we experienced following the summer of good weather in 2014 has continued on into the winter period and also at the start of 2015. Given that both 2013 and 2014 were good years for the tourism industry in Cumbria, year-on-year reports of increased visitor numbers and increased profits are even more significant.

Almost half of all businesses (47%) reported profits up for the last 6 months, and 54% reported visitor numbers up.

Repeat customers, the weather, website developments, and increased consumer confidence were the factors most affecting trade in a positive way over the last six months (see graphic below).

Increased costs, having to offer price reductions, the weather, and people spending less were cited most frequently as negative factors affecting business.

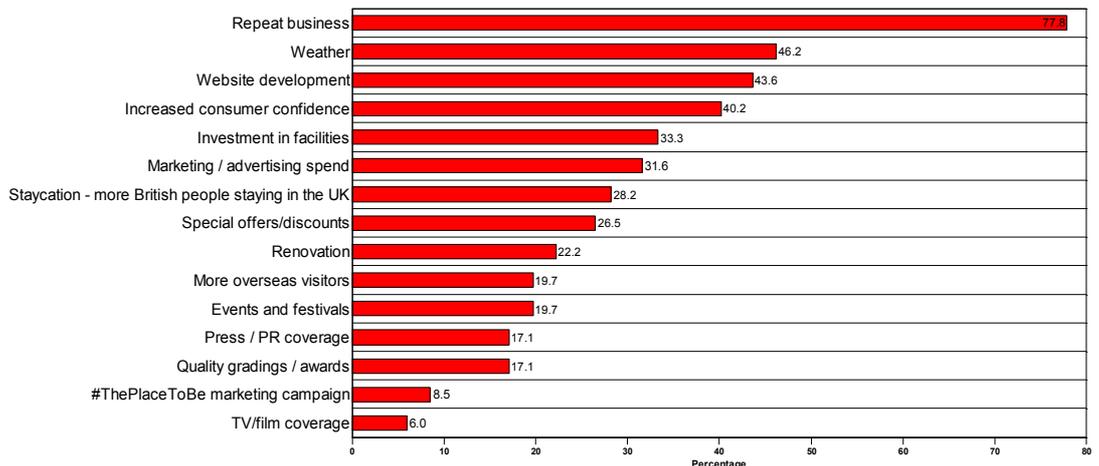
There were fewer reports of people spending less, taking fewer breaks, and taking shorter breaks and a reduction in the numbers of businesses reporting increased costs.

However, the number of businesses having to offer price reductions appears to have risen again in the last six months.

There continues to be a culture of last minute booking, and high customer expectations, alongside a desire for the cheapest rates: *"People book later, spend less, and want more"*.

Confidence is high, as are business expectations. 80% of businesses feel confident about 2015 (up from 63% this time a year ago), and 86% believe their business performance in 2015 will be the same or better than 2014.

Source: Cumbria Tourism: Tourism Business Performance Research March 2015



Cumbria Serviced Accommodation Occupancy

Since 1997, Cumbria Tourism has been surveying guest houses, hotels, and bed and breakfast (serviced accommodation) businesses. The information collected is reported on monthly and annually, and includes occupancy rates, visitor origin (domestic or overseas), and average length of stay, for different categories of accommodation providers.

Occupancy data for Cumbria underpins strategic development of the

tourism industry, providing evidence of business performance for a vital sector.

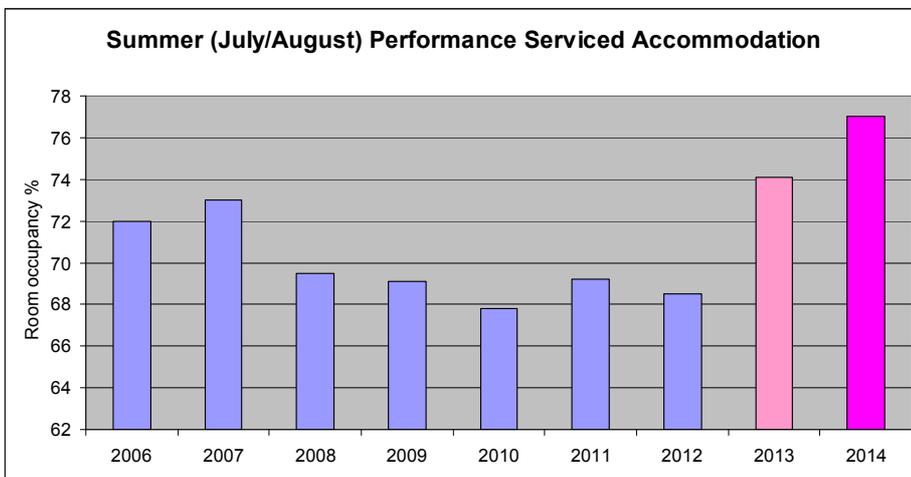
2006 and 2007 were particularly good years, but the recession affected occupancy levels between 2008 and 2012. The trends changed as the UK economy recovered in 2013. 2013 occupancy levels were the highest since 2008. 2014 rates were even better. The year ended up 3 percentage points on 2013 - and the first time annual average room occupancy has exceeded

60% in the last decade. Average annual room occupancy was 62.2%, up from 59.2% in 2013. With over 14,000 serviced accommodation rooms available each day in Cumbria, this increase is equivalent to an extra 156,443 rooms occupied in 2014 compared to 2013.

January room occupancy levels were lowest at 40%, and July and August highest at 77%-78%, when over three quarters of all available rooms across hotels, b&bs, and guesthouses were occupied. The July and August occupancy rates were the highest recorded for a number of years. The graph here shows occupancy rates for the two months combined, for the last nine years.

The first three months of 2015 have started well, with provisional occupancy figures up by 6% on the first three months of 2014.

Anyone can join our occupancy surveys - they are free and you do not have to be a member of Cumbria Tourism. If you are interested in finding out more please contact Ann Clarke on 015398 25003 or email aclarke@cumbriatourism.org



Cumbria Self Catering Accommodation Occupancy

Cumbria Tourism has also been running an occupancy survey for the self-catering holiday accommodation sector since the end of 2003. The survey includes houses, cottages, flats, chalets, lodges, and static caravans used for holiday accommodation. Around 230 properties around the county participate in this survey every month, making the findings truly representative.

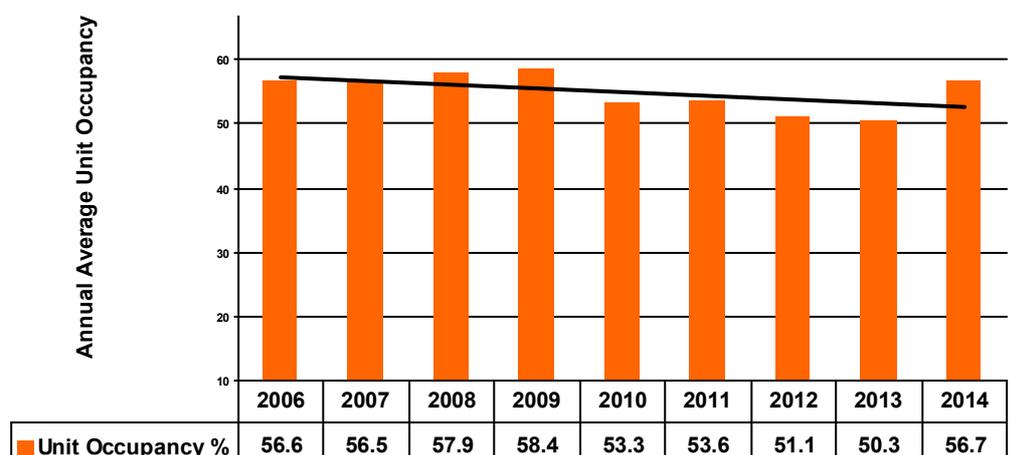
The chart opposite shows how the annual average unit occupancy rates have changed over the last nine years. Unit occupancy rates peaked in 2009 at 58.4%, but dropped significantly to 53% in 2010 and have fallen each year since, until last year. At 56.7% in 2014, annual average unit occupancy is back to pre-recession levels. With over 7,700 self catering units available each day in Cumbria, this increase is

equivalent to an extra 181,483 units occupied in 2014 compared to 2013.

The first three months of 2015 have started well, with provisional occupancy figures up by 8% on 2014.

See latest data for the county on our website here: <http://www.cumbriatourism.org/research/accommodation.aspx>.

To order an annual report please contact Helen Tate on 015398 25001.



Tourism Preferences of the Europeans

Each year the European Commission conducts research into the attitudes of Europeans towards tourism. Results from over 30,000 interviews conclude:

- 74% of EU citizens made at least one overnight trip away in 2014 - the same as in 2013.
- 45% took three or more overnight trips during 2014, up from 2013 figures.
- Countries with the highest proportions of non-travellers included Belgium, Italy and Spain, while people in Finland and Sweden took more overnight trips, with 56% taking four or more.
- People in Italy, France, Spain and Poland were more likely to have taken their main holiday in their home country, unlike the Belgians, where just 8% took their main holiday in their home country.
- Main motivations were for sun/beach (48%),

followed by visiting friends and relatives (36%), nature, culture and city trips.

- The internet was by far the most popular tool for arranging holidays, with 66% of EU citizens reporting having made use of the web to arrange a holiday (up from 58% a year ago and 53% two years ago). This rose to 80% of those in Ireland, Denmark, Finland, Sweden and the UK.
- Drivers of destination loyalty (and propensity to return) revolve mainly around the natural features of the area, followed by the quality of the accommodation, and cultural and historical attractions for most markets.
- Recommendations by friends, colleagues or relatives, and the internet, are the two most important sources of information when making travel plans.
- 45% of those across the

EU say that the economic situation is having no impact on their 2015 holiday plans, rising to 76% of Germans and 72% of Danes, but only applying to 24% of Italians, and 30% of Spaniards.

- The Irish, Danes, Swedes and Finns were the most upbeat in terms of consumer confidence, while those in France and Poland were the gloomiest in terms of future prospects.

Source: VisitBritain: *Preferences of Europeans Towards Tourism March 2015*

At the same time, Berwin Leighton Paisner have published the European Hotel Market Survey report for 2014. Current trends include:

- a continued demand for a personal experience and great customer service
- the desire for increased availability of technology to guests (including free Wi-Fi)

- the need for constant innovation and effective management of social media sites
- a possible short term threat to certain categories of business from the 'home from home' sector - HouseTrip, Homeaway, Airbnb etc

Source: Berwin Leighton Paisner: *Confidence in a Recovering Market - European Hotel Market Survey 2014*

“45% of those across the EU say that the economic situation is having no impact on their 2015 holiday plans, rising to 76% of Germans and 72% of Danes...”

Cumbria Visitor Survey 2015

Every three years Cumbria Tourism commissions a county-wide visitor survey to provide a robust and representative analysis of the profile and characteristics of our visitors.

This ensures we are using relevant information to inform policy development and provide guidance for future tourism development and marketing in Cumbria.

QA Research have been commissioned to carry out this work which involves over 1,000 face to face interviews between June and September. The interviews will be conducted at key visitor destinations across the county.

Topics include:

- Visitor origin
- Socio-demographics
- Ethnicity/disability
- Family/group composition
- Visitor type

- Visit purpose
- Decision-making process including timing of decision and information sources used
- Motivations/reasons for visit
- Previous visits
- Expenditure
- Transport
- Visitor satisfaction
- Future visits
- Activities undertaken

Analysis will be done by area (local authority district, and Lake District National Park) and visitor type (day/staying, domestic/overseas, first time/repeat), with comparisons back to 2006, 2009 and 2012 surveys.

The final report is expected by the end of the year.

Visits to Cumbria's Visitor Attractions in 2014

Each year Cumbria Tourism runs a visitor volume survey amongst visitor attractions across the county.

In 2014, 82 attractions provided us with information about their 6.17m visitors. 64 attractions provided figures for both 2013 and 2014, revealing an increase on average of +4.7% of visitors in 2014 - an extra 238,000 visitors through their doors.

The top 20 were:

1. [Windermere Lake Cruises](#) in South Lakeland with 1,469,189 visitors
2. [The Rheged Centre](#) outside Penrith with 409,660 visitors
3. [Ullswater Steamers](#) in Eden with 361,410 visitors
4. [Tullie House Museum and Art Gallery](#) in Carlisle with 232,700 visitors
5. [Lake District Visitor Centre Brockhole](#) near Ambleside with 230,676 visitors
6. [Ravenglass and Eskdale Railway](#) in Copeland with 200,169 visitors
7. [Whinlatter Forest Park & Visitor Centre](#) in Allerdale with 184,222 visitors
8. [Grizedale Forest Park and Visitor Centre](#) in South Lakeland with 179,147 visitors
9. [Carlisle Cathedral](#) with 168,566 visitors
10. [The World of Beatrix Potter](#) in Bowness with 155,214 visitors
11. [Honister Slate Mine](#) in Borrowdale with 125,566 visitors
12. [Theatre By The Lake](#) in Keswick with 113,045 visitors
13. [Sizergh Castle](#) near Kendal with 102,860 visitors
14. [Hill Top](#) (the home of Beatrix Potter) in Far Sawrey with 95,073 visitors
15. [Lakeland Motor Museum](#) in Backbarrow with 79,469 visitors
16. [Wray Castle](#) near Hawkshead with 78,922 visitors
17. [Muncaster Castle](#) near Ravenglass with 78,684 visitors
18. [Lowther Castle and Gardens](#) outside Penrith with 52,911 visitors.
19. [Carlisle Castle](#) with 51,572 visitors
20. [Dove Cottage and the Wordsworth Museum](#) in Grasmere with 50,145 visitors

Source: Cumbria Tourism - Visitor Attractions Monitor

(Please note this only includes visitor attractions who provided data and also gave permission for their figures to be published. Some visitor numbers may be estimated).



Photo by Tony West
© Windermere Lake Cruises

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 500 accommodation providers each month - people can join online for free and receive regular information to benchmark their performance.
- We offer Mosaic customer profiling and mapping services, to help you understand your customers better, starting from just £300 for your own database segmentation.
- 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.



Cumbria Tourism
At the heart of our visitor economy

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