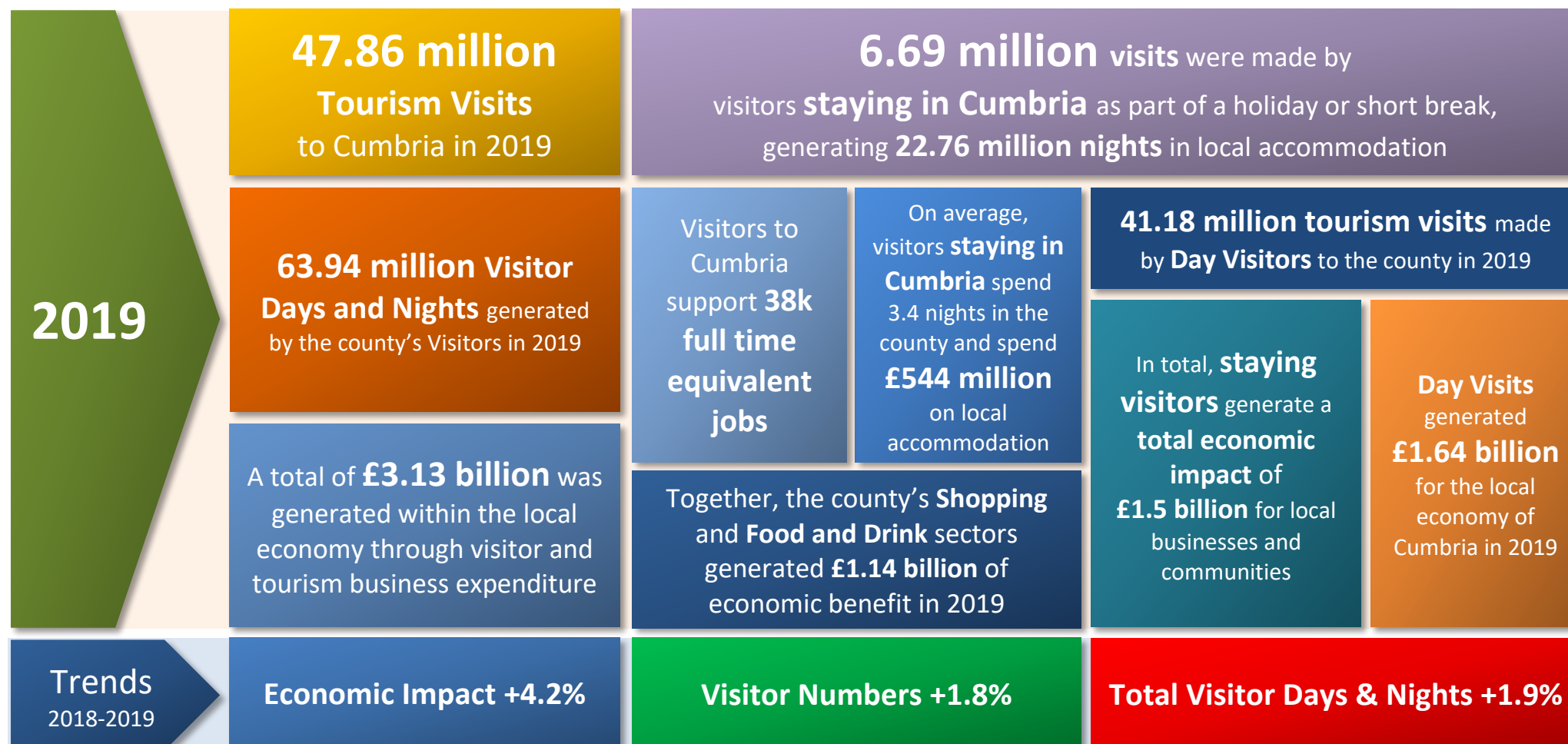


The Visitor Economy of Cumbria

This is a summary of the annual tourism economic impact research undertaken for Cumbria Tourism for the calendar year 2019, with comparisons to 2018 (1 year trend) and 2014 (5 year trend). Outputs in this report have been generated using STEAM, the tourism specific economic impact model, owned and operated by Global Tourism Solutions (UK) Ltd.



2019

Visitor Types

Staying Visitors encompass all tourists staying overnight for at least one night in one of the following types of accommodation:

- **Serviced Accommodation** - including Hotels, Guest Houses, B&Bs, Inns
- **Non-Serviced Accommodation** – including Self-Catering properties such as Houses, Cottages, Chalets and Flats, as well as Camping and Caravanning, Hostels and University / College accommodation
- **Staying with Friends and Relatives (SFR)** – unpaid overnight accommodation with local residents

Day Visitors visiting the area on a non-routine and non-regular leisure day trip from a home or holiday base

Staying Visitors

14.0% of Visits

Day Visitors

86.0% of Visits

**Total
Visitor
Numbers
47.86m**

Visitor Numbers

There were an estimated 47.86m tourism visits to Cumbria in 2019, 1.8% higher than in 2018. Since 2014 the county has seen the total number of visits by rise by 15.2%.

In, 2019, Cumbria saw 6.69m staying visits – those visits made by guests in paid accommodation or stays with friends and relatives in local homes. Staying visitors accounted for 14.0% of all visitors to Cumbria in 2019. There has been strong growth in staying visits since 2014, with stays up by 12.1% during that time and up 1% between 2018 and 2019. Visitors staying in paid accommodation account for the majority of overnight stays, with serviced accommodation being the dominant sector (3.28m visits), followed by non-serviced accommodation (2.59m visits). Even with a relatively small population, stays with friends and relatives are important to the county

however, accounting for an estimated 820,000 visits. Between 2018 and 2019, the non-serviced sector saw the highest levels of growth in visits (+1.7%), followed by serviced accommodation (0.6%). In total, it is estimated that there were 65,000 more overnight visits in 2019 compared to 2018.

Day visitors accounted for 86.0% of all visits made to the county in 2019. Cumbria is an immensely popular destination for day visits and, as such, the day visitor market is an essential economic driver locally. Day visits grew by 1.9% compared to 2018.

Key Figures: Visitor Numbers: 2019

Visitor Numbers		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019 (Millions)	M	3.276	2.589	0.820	6.685	41.177	47.862
2018 (Millions)	M	3.257	2.544	0.818	6.620	40.409	47.029
Change 18/19 (%)	%	+0.6	+1.7	+0.2	+1.0	+1.9	+1.8
Share of Total (%)	%	6.8	5.4	1.7	14.0	86.0	100.0

Total Visitor Days

63.94m

Visitor Days

The county's visitors spent an estimated 63.94m days in the county during 2019; 1.9% higher than in 2018 and 16% higher than in 2014. This comprises the volume of day visits and the total number of days and nights spent by staying visitors. On average, staying visits to Cumbria generate 3.4 days in the county.

Between 2018 and 2019, day visits increased by 1.9%. There were an estimated 41.18m tourism day visits to the county area during 2019 and these accounted for 64.4% of all visitor days.

Staying visitors to Cumbria accounted for the remaining visitor days (35.6%) and these overnight visits to the county generated 22.76m visitor days in 2019. Staying visitor days increased by 1.8% between 2018 and 2019, with the strongest performance in the serviced accommodation sector (+2.1%), followed closely by the non-serviced sector (+1.9%). Overall, staying visitors spent an estimated 410 thousand extra nights in the county in 2019 compared to 2018. On average, staying visits were longer in 2019 than in 2018.

Key Figures: Visitor Days: 2019

Visitor Days		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019 (Millions)	M	6.047	14.682	2.031	22.759	41.177	63.937
2018 (Millions)	M	5.924	14.404	2.026	22.353	40.409	62.763
Change 18/19 (%)	%	+2.1	+1.9	+0.3	+1.8	+1.9	+1.9
Share of Total (%)	%	9.5	23.0	3.2	35.6	64.4	100.0

Average Length of Stay for Different Visitor Types: 2019

Day
Visitors

1.0

All
Visitors

1.3

Serviced
Accommodation

1.8

Staying with
Friends/Relatives

2.5

Staying
Visitors

3.4

Non-Serviced
Accommodation

5.7

**Total
Economic
Impact
£3.13bn**

Economic Impact

The value of tourism activity in Cumbria was estimated to be £3.13bn in 2019. Since 2014, the value of tourism activity within the county has risen from £2.44bn (+£690m). Between 2018 and 2019, the total value of tourism activity in Cumbria grew by 4.2%.

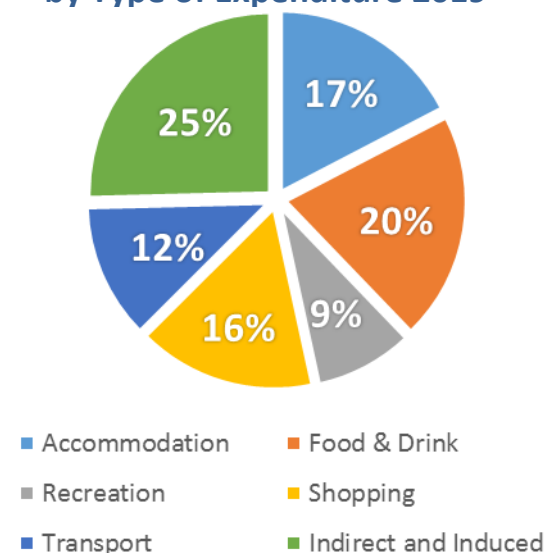
The total economic impact comprises the expenditure of visitors on goods and services, totalling £2.335bn, and the *indirect* and *induced* economic effects of local businesses and residents spending tourism

revenues locally, accounting for a further £795m.

In 2019, the three largest areas of expenditure for visitors were Accommodation costs (£544m), Food and Drink (£640m) and Shopping (£498m). Together, these categories of spend account for over 70% of total direct expenditure by visitors. The accommodation sector saw growth in revenue of 3.9% between 2018 and 2019, pushing the direct value of that sector up by £21m.

In 2019, the county's day visitor market accounted for 52.2% of the value of tourism activity (£1.635bn), and had increased by 4.2% between 2018 and 2019. In 2019, the staying visitor market had grown by £60m (+4.2%) and generated £273m more economic benefit for the local economy compared to 2014.

£3.13bn Total Economic Impact by Type of Expenditure 2019



Accommodation:	Payments for overnight stays in accommodation, such as room rates, pitch fees and hire charges for non-serviced accommodation
Recreation:	Covering expenditure on a wide range of leisure activities such as museum, event, concert / theatre and attractions attendance as well as sports participation and spectating.
Transport:	Expenditure within the destination on travel, including fuel and public transport tickets
Food and Drink:	Spend on eating and drinking at restaurants, cafes and other venues, takeaway food, snacks and groceries
Shopping:	What visitors spend on items including clothing / jewellery, household items, music / films / games, gifts and smaller items, books and maps, plants and garden items
Indirect:	The expenditure by local tourism businesses within the local supply chain

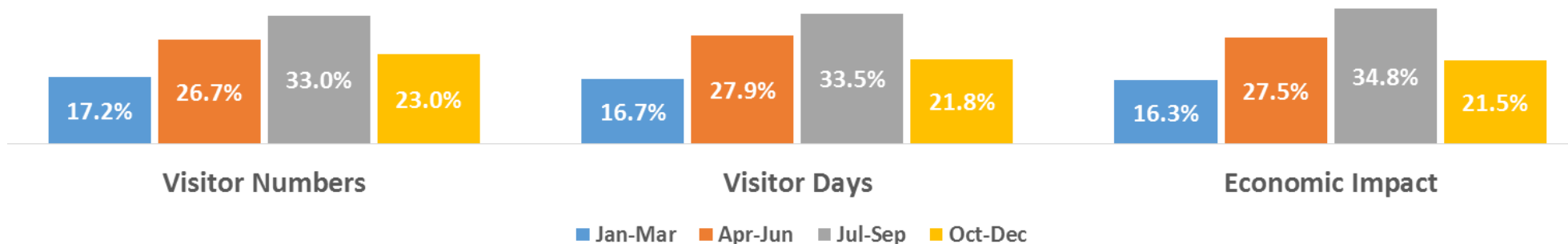
Key Figures: Economic Impact: 2019

Economic Impact		Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
2019 (£ Billions)	£Bn	0.664	0.767	0.064	1.495	1.635	3.130
2018 (£ Billions)	£Bn	0.645	0.727	0.062	1.435	1.569	3.004
Change 18/19 (%)	%	+2.9	+5.5	+2.7	+4.2	+4.2	+4.2
Share of Total (%)	%	21.2	24.5	2.0	47.8	52.2	100.0

Average Economic Impact Generated by Each Type of Visitor: 2019

Economic Impact	Serviced	Non-Serviced	SFR	Staying Visitors	Day Visitors	All Visitors
Economic Impact per Day	£109.82	£52.25	£31.50	£65.69	£39.70	£48.95
Economic Impact per Visit	£202.69	£296.36	£78.02	£223.66	£39.70	£65.39

Seasonal Distribution of Key Visitor Metrics: 2019



**Total
FTEs
Supported
38,129**

Employment Supported by Tourism

The expenditure and activity of visitors to Cumbria supported a total of 38,129 Full-Time Equivalent jobs (FTEs); 1% higher than in 2018 and 12.4% higher than in 2014.

Total employment includes the jobs generated by the expenditure of visitors on goods and services, totalling 30,138 FTEs, and the *indirect* and *induced* employment supported through local businesses and residents spending tourism revenues locally, accounting for a further 7,992 FTEs.

The Accommodation sector is believed to be the largest direct employer (9,432 FTEs), with the Food and Drink sector also contributing significantly to local employment levels (8,304 FTEs).

Employment Supported by Tourism: Full-Time Equivalents (FTEs) by Type: 2019

Employment Supported by Sector 2019	Direct Visitor Employment						Indirect and Induced	Total
	Accommodation	Food & Drink	Recreation	Shopping	Transport	Total Direct		
Totals	9,432	8,304	4,320	5,889	2,193	30,138	7,992	38,129

Distribution of Visitor Numbers and Total Economic Impact by Authority Area: 2019

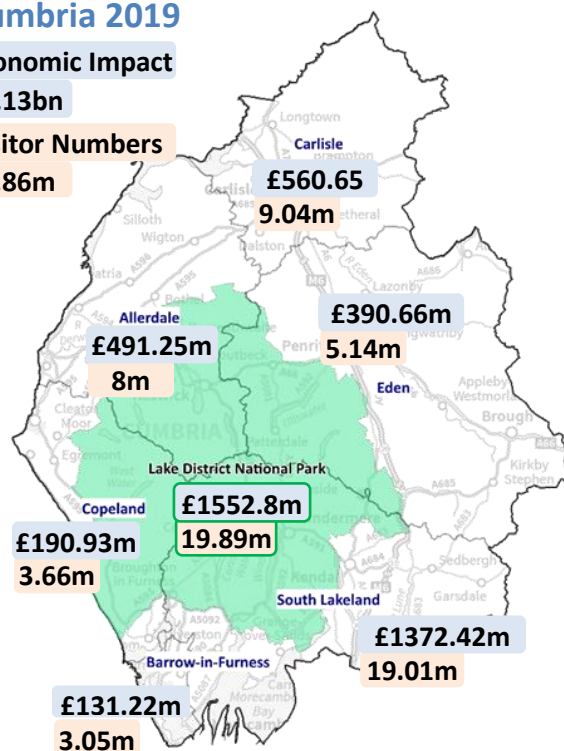
Cumbria 2019

Economic Impact

£3.13bn

Visitor Numbers

47.86m



Allerdale Borough Council

Barrow Borough Council

Carlisle City Council

Copeland Borough Council

Eden District Council

South Lakeland District Council

Cumbria

Lake District National Park

Visitor Numbers (Millions)	8.0	3.1	9.0	3.7	5.1	19.0	47.9	19.9
% of Cumbria Total	16.7%	6.4%	18.9%	7.7%	10.7%	39.7%	100.0%	41.5%
Total Economic Impact (£ Millions)	£491.3	£131.2	£560.6	£190.9	£390.7	£1,372.4	£3,137.1	£1,552.8
% of Cumbria Total	15.7%	4.2%	17.9%	6.1%	12.5%	43.7%	100.0%	49.5%

Note: All figures rounded to 1 decimal place.

Contains Ordnance Survey Data
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STEAM Comparative Headlines: 2018 and 2019 – 1 Year Trend

STEAM FINAL TREND REPORT FOR 2009-2019

CUMBRIA

Comparing 2019 and 2018

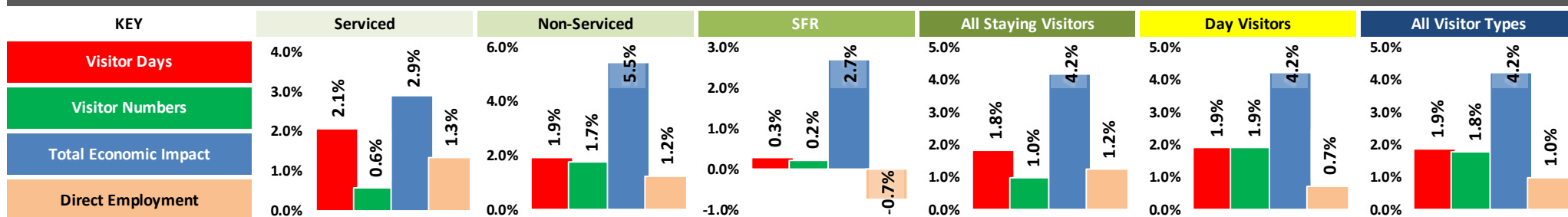
All £'s Historic Prices

COMPARATIVE HEADLINES

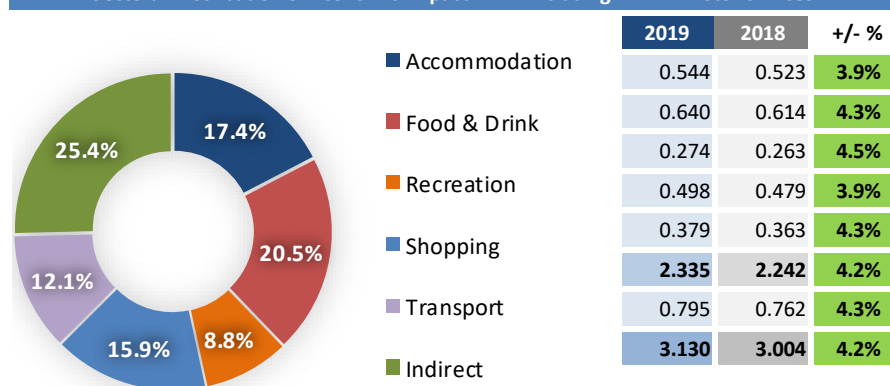
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2019 & 2018 - IN HISTORIC PRICES

KEY																				
An increase of 3% or more		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types			
Less than 3% change		Serviced			Non-Serviced															
A Fall of 3% or more		2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	2019	2018	+/- %	
Visitor Days	M	6.047	5.924	2.1%	14.68	14.40	1.9%	2.031	2.026	0.3%	22.76	22.35	1.8%	41.18	40.41	1.9%	63.94	62.76	1.9%	
Visitor Numbers	M	3.276	3.257	0.6%	2.589	2.544	1.7%	0.820	0.818	0.2%	6.685	6.620	1.0%	41.18	40.41	1.9%	47.86	47.03	1.8%	
Direct Expenditure	£Bn																	2.335	2.242	4.2%
Economic Impact	£Bn	0.664	0.645	2.9%	0.767	0.727	5.5%	0.064	0.062	2.7%	1.495	1.435	4.2%	1.635	1.569	4.2%	3.130	3.004	4.2%	
Direct Employment	FTEs	9,075	8,955	1.3%	6,621	6,540	1.2%	565	569	-0.7%	16,262	16,065	1.2%	13,876	13,775	0.7%	30,138	29,840	1.0%	
Total Employment	FTEs																38,129	37,766	1.0%	

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2019 & 2018 - IN HISTORIC PRICES



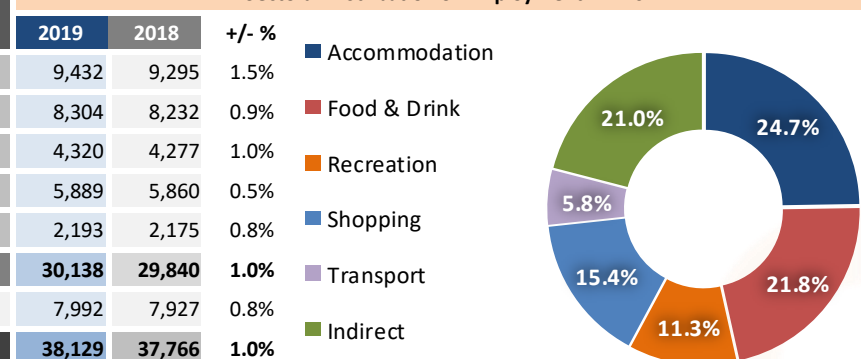
Sectoral Distribution of Economic Impact - £Bn including VAT in Historic Prices



Sectors

Sectors	2019	2018	+/- %
Accommodation	9,432	9,295	1.5%
Food & Drink	8,304	8,232	0.9%
Recreation	4,320	4,277	1.0%
Shopping	5,889	5,860	0.5%
Transport	2,193	2,175	0.8%
TOTAL DIRECT	30,138	29,840	1.0%
Indirect	7,992	7,927	0.8%
TOTAL	38,129	37,766	1.0%

Sectoral Distribution of Employment - FTEs



STEAM Comparative Headlines: 2014 and 2019 – 5 Year Trend

STEAM FINAL TREND REPORT FOR 2009-2019

CUMBRIA

Comparing 2019 and 2014

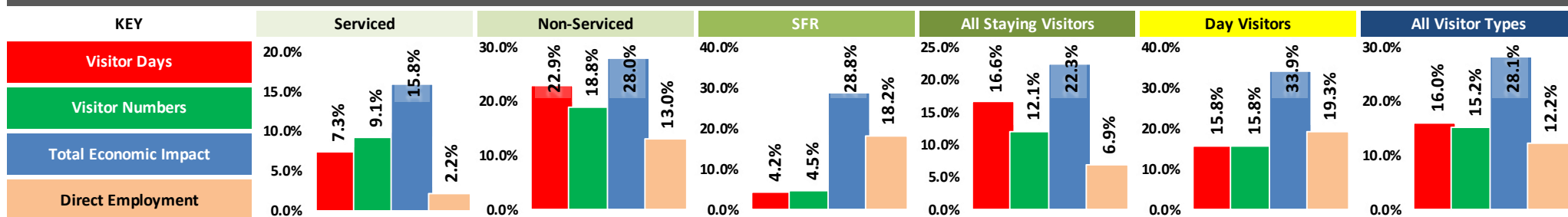
All £'s Historic Prices

COMPARATIVE HEADLINES

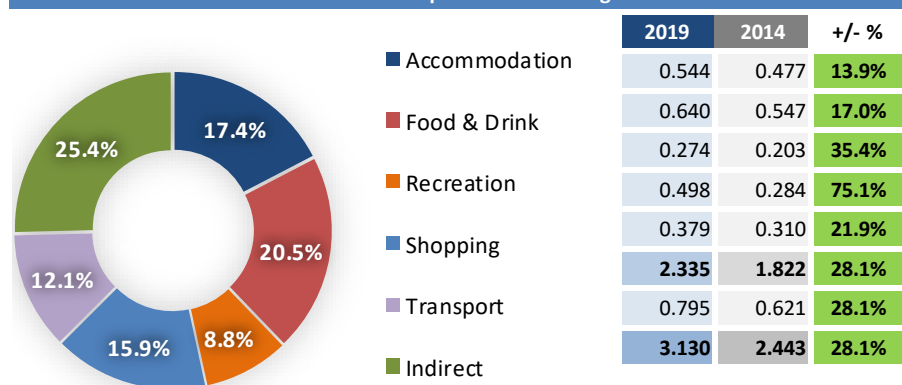
KEY PERFORMANCE INDICATORS BY TYPE OF VISITOR - COMPARING 2019 & 2014 - IN HISTORIC PRICES

KEY																			
An increase of 3% or more		Staying in Paid Accommodation						Staying with Friends and Relatives (SFR)			All Staying Visitors			Day Visitors			All Visitor Types		
Less than 3% change		Serviced			Non-Serviced														
A Fall of 3% or more		2019	2014	+/- %	2019	2014	+/- %	2019	2014	+/- %	2019	2014	+/- %	2019	2014	+/- %	2019	2014	+/- %
Visitor Days	M	6.047	5.634	7.3%	14.68	11.94	22.9%	2.031	1.949	4.2%	22.76	19.53	16.6%	41.18	35.57	15.8%	63.94	55.10	16.0%
Visitor Numbers	M	3.276	3.002	9.1%	2.589	2.178	18.8%	0.820	0.785	4.5%	6.685	5.966	12.1%	41.18	35.57	15.8%	47.86	41.54	15.2%
Direct Expenditure	£Bn																2.335	1.822	28.1%
Economic Impact	£Bn	0.664	0.573	15.8%	0.767	0.599	28.0%	0.064	0.050	28.8%	1.495	1.222	22.3%	1.635	1.221	33.9%	3.130	2.443	28.1%
Direct Employment	FTEs	9,075	8,880	2.2%	6,621	5,860	13.0%	565	478	18.2%	16,262	15,218	6.9%	13,876	11,635	19.3%	30,138	26,853	12.2%
Total Employment	FTEs																38,129	33,920	12.4%

PERCENTAGE CHANGE BY VISITOR TYPE AND PERFORMANCE MEASURE - COMPARING 2019 & 2014 - IN HISTORIC PRICES



Sectoral Distribution of Economic Impact - £Bn including VAT in Historic Prices



- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport
- Indirect

	2019	2014	+/- %
Accommodation	0.544	0.477	13.9%
Food & Drink	0.640	0.547	17.0%
Recreation	0.274	0.203	35.4%
Shopping	0.498	0.284	75.1%
Transport	0.379	0.310	21.9%
TOTAL DIRECT	2.335	1.822	28.1%
Indirect	0.795	0.621	28.1%
TOTAL	3.130	2.443	28.1%

Sectors

Sectors	2019	2014	+/- %
Accommodation	9,432	9,353	0.8%
Food & Drink	8,304	8,040	3.3%
Recreation	4,320	3,614	19.5%
Shopping	5,889	3,809	54.6%
Transport	2,193	2,037	7.7%
TOTAL DIRECT	30,138	26,853	12.2%
Indirect	7,992	7,067	13.1%
TOTAL	38,129	33,920	12.4%

Sectoral Distribution of Employment - FTEs

	2019	2014	+/- %
Accommodation	9,432	9,353	0.8%
Food & Drink	8,304	8,040	3.3%
Recreation	4,320	3,614	19.5%
Shopping	5,889	3,809	54.6%
Transport	2,193	2,037	7.7%
TOTAL DIRECT	30,138	26,853	12.2%
Indirect	7,992	7,067	13.1%
TOTAL	38,129	33,920	12.4%

- Accommodation
- Food & Drink
- Recreation
- Shopping
- Transport
- Indirect

