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CUMBERLAND AND WESTMORLAND

FACTS AND FIGURES

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PREFACE

The Department of Economics of the University of Lancaster was commissioned by the Board of Trade to undertake an economic and social survey of that part of England north of the Ribble and west of the Pennines. Work on the project started in October 1964 with the intention of presenting a single report containing a description of the area together with an analysis of past and future trends and recommendations for action. The work was undertaken within the University, with the co-operation of appropriate central and local government bodies. Much of this co-operation was arranged by the North West Study Group with which the work has been closely associated. The study of the agriculture of the area was, however, sub-contracted to a team working under Professor J.Ashton at the University of Newcastle-upon-Tyne.

As a result of the change in Government policy, and in particular the establishment of regional bodies for the North Western and Northern regions, the pattern of the work had to be changed. The first priority became the presentation of the descriptive material which had been collected, split into two sections to correspond with the two regions into which the study area has been divided. The report which follows consists of only the descriptive part of the work relating to Cumberland and Westmorland. This will be followed at intervals over the next six months by analytical reports concerned with particular topics in which future trends and recommendations will be discussed. Only when all these reports on topics are available to be read alongside the present descriptive report will the full pattern of the research become apparent.

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September, 1965

THE TOURIST INDUSTRY

Any comprehensive assessment of the tourist industry must be made in relation to national, regional and local recreational needs; such an assessment is however, beyond the scope of the present study. An examination has briefly been made of the existing size and character of the tourist industry in this area compared with the national and regional picture, and of the contribution of tourism to the local economy together with a brief examination of the tourist potential of the area.

The number of people taking a main holiday (defined for this purpose as a period away from home of 4 days or more), has increased from 15 million in 1937 to 24 million in 1950 and to 31 million in 1963. Moreover, the proportion of the population taking a holiday has increased from 1937 - 30% to 1963 - 60%. In 1963 these 31 million holiday-makers took about $35\frac{3}{4}$ million holiday trips - $26\frac{1}{2}$ million main holidays in Britain, $4\frac{1}{2}$ million additional holidays and $4\frac{3}{4}$ million holidays abroad. In addition to these holidays there are the day trips estimated in 1960 as $7\frac{1}{2}$ million. Thus since the war the trends have been towards more holidays, more holidays abroad, and more people taking more than one holiday; but in spite of these trends, there are still many people (23 million in 1963), who do not take a main holiday. As one might expect, the taking of holidays varies with income, age, social class, age of family, and there is a regional difference in the proportion of the population which takes a holiday.

Table 1: Region in which main holiday was spent

B.T.H.A. Regions	Percentage distribution by region			
	1951 %	1955 %	1960 %	1964 %
South West	14	18	17	20
South	12	11	13	14
London and South East	20	15	15	12
North West and N. Ireland	11	14	15	13
Wales	9	8	10	10
Scotland	10	10	11	12
East	8	8	8	7
North and North East	10	11	8	9
Midlands	6	5	7	7
	100	100	104	104

Source: B.T.H.A. Surveys.

Note Figures add up to over 100% as some people take a holiday in more than oneregion.

Table 2: Hotels in Cumberland and Westmorland

	Total number of hotels	Hotels with under 10 rooms		Hotels with over 10 rooms	
		number	number of rooms	number	number of rooms
Cumberland	293	104	723	189	4151
Westmorland	251	69	516	182	3977
	544	173	1243	271	8128

Source: 1961 Census County volumes.

Thus the Census data suggests a similar total number of hotels to the rateable value data. The total number of hotel rooms according to the census data was 9371; one might therefore expect a capacity of something like 10,000 persons. When a comparison is made of the rateable value and census data for districts some discrepancies do however appear.

e.g.

Carlisle C.B.	Census	53 hotels and boarding houses
	R.V.	18 hotels " " "
Lakes U.D.	Census	78 hotels and boarding houses
	R.V.	110 hotels " " "

Thus not only do the rateable value and census data differ but they differ in different directions in the two areas. If this data is to be used for districts a further check would seem necessary; moreover as we have already noticed the census data in giving rooms not bedrooms has limitations for our present purpose. Lists are however produced by various organisations e.g. The British Travel and Holiday Association, certain local authorities, which give number of bedrooms and in many cases the number of single and double rooms. These lists are not, however, comprehensive. The B.T.H.A. list for example lists 113 hotels and boarding houses in Cumberland and Westmorland containing 918 single and 1934 double rooms. In the Lake District National Park the same list shows 75 hotels containing 535 single and 1321 double rooms. The Cumberland County Council produce a list of the accommodation which is available within the county. This lists some 247 hotels and boarding houses, three hostels and 21 farmhouses, this compares with 293 hotels in Census and 244 in rateable value data.

Table 3: Hotels and Boarding Houses in Cumberland

	Number of hotels	Number of bedrooms	% distribution of rooms by region
Total in county	247	3088	
In National Park	140	1576	51.1
In Carlisle C.B.	17	455	14.7
In Penrith U.D.	19	223	7.2
At Seaside			
Allonby	3	27	139
Silloth	8	112	
Ravenglass	1	11	
St. Bees	5	56	157
Seascale	10	90	
total at seaside	27	296	9.6
Elsewhere	44	538	17.4

Thus within Cumberland 51% of the hotel rooms are within the National Park and a further 14.7% in Carlisle. Considering the length of coastline a relatively small number, only 9.6% of all hotel rooms are at the seaside. If 30% of the hotel rooms within Cumberland were single rooms and the remainder double there would be room for some 5,200 visitors in these hotels. In Westmorland, assuming that (1) there were 251 hotels within the County (Census figure) (2) the average number of rooms per hotel was 13 (average for Cumberland) and (3) 30% were single and the remainder double rooms, it would appear that accommodation was available for 5,526 persons - making a total for the two counties of some 10,700 persons.

Holiday flatlets have become increasingly popular in recent years. It is however very difficult to gauge the number and even more difficult to estimate how many people might stay in them. There are a certain number of such flatlets in Cumberland and Westmorland, but there do not appear to be so many here as in the seaside resorts of the Lancashire coast.

In recent years the attraction of a caravan, chalet, or camping holiday seems to have been recognised by more people. A certain amount of data on the capacity of an area for this type of accommodation can be obtained from the lists produced by various organisations for example B.T.H.A. Caravan and Camping Sites in Britain; National Federation of Sites Operator:

The Sites Handbook; Popular Camping: Camping sites in Britain. Unfortunately these lists are not comprehensive nor do they give in many cases the capacity of the sites in terms of tents, caravans and chalets. In Westmorland for example aggregating the data from the above lists gives 14 sites inside the Park and a further 9 outside.

The Cumberland County Council do, however, produce a comprehensive list of caravan and camping sites with over 3 pitches. This list showed there are 2,332 holiday caravan and camping pitches within the administrative county (excluding Carlisle C.B.) and 11 holiday chalets. 940 or 40% of the pitches, are within the National Park and a further 885 or 38% on the Cumberland Coast at Silloth and Allonby. At an assumed occupancy of 4 persons per caravan (rate used in Norfolk County Council Report) holiday caravans in Cumberland would have a capacity of 9,328 or at an occupancy rate of 3.5, 8,162 persons. In addition to the caravan sites there are some 775 authorised camping pitches in the Keswick Borrowdale area.

A survey of camping and caravanning has been carried out in the District National Park for some years, and amongst the data collected is the number of caravans and tents in the park at the peak holiday week - Easter, Whitsun and August Bank Holiday. Although the numbers obviously vary from year to year due to the weather an increase in numbers can be seen from 578 caravans in August 1952, to 1879 in 1960 and 2420 in 1962 the peak holiday weekend was at Whitsun when 2465 caravans and tents were counted within the Park. At an assumed occupancy of 4 persons per caravan and 3 persons per tent it would appear that 26,640 persons were enjoying a camping or caravan holiday at this time within the National Park (including that part in Lancashire).

Within Cumberland and Westmorland accommodation on caravan and tent sites might be found for 33,900 persons.

Cumberland	-	2332 caravans	9300 persons
Westmorland	-	1650 caravans (est)	6600 persons
Cumberland & Westmorland	-	6000 tents (est)	18000 persons

A considerable amount of hostel accommodation is also available in the Lake District. There are twenty-three Youth Hostels within the Park (including the part in Lancashire) these hostels have a capacity of 1322 beds. There are a further six youth hostels in Cumberland and Westmorland outside the park with a capacity of 326 beds. The Country Wide Holiday Association and the Holiday Fellowship have seven centres within the Park total capacity 453. Finally the Ramblers Association rent Hasness Buttermere from the Planning Board, accommodation is available here for 24 guests.

Finally there is accommodation available with friends and relations. The volume of such accommodation must always be an estimate unless detailed local surveys are available. It would however probably be reasonable to assume that 30% of those holidaying in an area would be staying with friends or relations or in all other accommodation (Table 4).

In conclusion it would appear that accommodation for 66341 holidaymakers might be available in Cumberland and Westmorland at any one time.

10,700	in hotels and boarding houses
33,800	in caravan and camping sites
<u>1,939</u>	in hostels
<u>46,439</u>	
19,902	+ 30%
66,341	total holidaying in area at any one time

Table 4: Distribution of Main Holidays by type of Accommodation

	UNITED KINGDOM			NORTH WEST REGION	NORTH AND NORTH EAST
	1951	1955	1964	1964	
	%	%	%	%	%
Licensed Hotels	10	14	15	17	12
Unlicensed hotels & boarding houses	31	27	29	42	29
Holiday Camps	3	4	6	3	6
Camping	4	3	4	2	1
Caravans	-	8	13	5	14
Villa, flat	8	7	8	3	10
Friends, relations	36	31	22	28	22
All others	15	12	7	5	12
	<u>107</u>	<u>106</u>	<u>104</u>	<u>105</u>	<u>106</u>

Source: B.T.H.A. Surveys.

Note Percentages add up to over 100 in some cases as some holidaymakers stay in more than one type of accommodation.

Table 4 illustrates clearly the changes in the type of accommodation used in the United Kingdom between 1951 and 1964

- increase in caravans
- decrease in unlicensed hotels and boarding houses
- decrease in friends and relations
- increase in licensed hotels

In 1964 however, the pattern in the North West differed in certain respects from that in the United Kingdom:-

- more in unlicensed hotels and boarding houses
- more in licensed hotels
- fewer holiday camps, camping, caravans and villas
- more with friends or relations.

The data given earlier does not, however, suggest that the Cumberland and Westmorland is very typical of the North West Region. For example within Cumberland it appeared that there was room for 5200 persons in hotels and about 9,000 on caravan sites, it would therefore seem improbable that 59% of those holidaying in the area would be staying in hotels as in the North West Region. It seems probable that the accommodation used by the holidaymaker in Cumberland and Westmorland follows the pattern of that used in the North and North Eastern region which includes the Northumberland National Park, the Yorkshire Dales National Park and the North York Moors National Park.

The holiday season in this country is concentrated into a relatively short period of time. In 1960, 65% of the main and 20% of the additional holidays were spent in July and August. This concentration is the product of a number of factors - school holidays, timing of industrial holidays, weather etc. The concentration does however lead to congestion at peak periods and under-utilization at other times of the year. Cumberland and Westmorland are attractive areas for a spring or autumn holiday as well as the normal summer holiday. It also appears to be an area favoured by those taking a second holiday.

In 1964 the average length of holiday in the United Kingdom was 9.9 days; in the North West however, the figure was 9.0 days and in the North and North East 9.8 days. In the North West and the North and North East more 7 night holidays were taken than 11-14 night. This contrasts

with the picture in the country as a whole and in Devon and Cornwall. This difference is probably largely due to the distance travelled to holiday, i.e. if one travels 200 - 300 miles one will probably stay two weeks, but if 50 - 100 miles a stay of one week is possible. The North West and the North and North East attract a higher proportion of their holiday visitors locally than does Devon and Cornwall; this is, of course in part due to the fact that there are not so many people living adjacent to Devon and Cornwall as there are in the North of England.

Table 5: Region of Origin of holidaymakers in various regions 1964

Region of Origin (Standard regions)	Region of Holiday B.T.H.A. regions			
	United Kingdom %	North West Region %	Devon and Cornwall %	North and North East %
Northern	6	12	3	20
East and West Ridings	9	12	8	34
North Western	12	25	10	9
North Midland	8	4	7	6
Midland	9	8	11	2
Eastern	7	5	9	5
London and South Eastern	21	13	28	12
Southern	6	2	8	-
South Western	7	4	10	3
Wales	4	3	3	2
Scotland	10	10	2	8
Total	99	100	99	101

Source: B.T.H.A. Surveys

Note Percentages do not add up to 100.

An attempt was made to see how far the region of origin of holidaymakers in the study area reflected that in the North Western region. Analyses were therefore made of the region of origin of those staying in various hostels within the area. It is of course true that those staying in hostels may well be untypical of the remaining people holidaying in the area, with,

however, insufficient resources to make a comprehensive investigation us had to be made of the data which was readily available. Two of the host investigated were in the Lake District proper, one in Kendal and the oth in Kirkby Stephen. All four hostels showed a smaller proportion of the visitors coming from Scotland than in the North West region as a whole a with the exception of Kirkby Stephen more coming from the South East. T Kirkby Stephen hostel had over half it's visitors coming from the North North East compared with 24% - 30% in the other hostels.

This information fits in well with the analysis of the Lancashire coastal resorts, in these areas Scotland appeared more popular than in the North West as a whole and the South East less popular.

The great post war change has been the increase in the number of ca on the road. This increase has also been reflected in the way people tr to holiday. In 1951, 27% travelled by car, in 1955, 34% and in 1964, 57 This increase in the use of the car has been accompanied by a decrease i the use made of trains and buses. In the North West in 1964 - the car w less important than in the United Kingdom, 46,3 compared with 57%, whilst the bus was more important, 25% compared with 17%. The smaller proporti of the population holidaying in the North West travelling by car, probab reflects the below average car ownership rate per 1,000 population in th Northern and North Western Regions, - 98 and 97 per 1,000 compared with in the United Kingdom.

The B.T.H.A. also make annual estimates of the amount spent on holi in this country. In 1964 it was estimated that £675m. were spent, £430m. in Great Britain and £245m. abroad. No estimates are however mad the multiplier effects of this expenditure. Estimates are also made of average expenditure per head of those holidaying in each region. In the North West the figure was £17 per head, slightly above the figure for th United Kingdom of £16 per head; in Wales on the other hand, the figure w £14 per head. The differing expenditure per head seems to largely refle the type of accommodation used, and to a lesser extent the length of sta In the study area hotels and boarding houses are less popular than in th North West region, it is therefore probable that the average expenditure head is also less.

It is easily said that tourism is important to the economy of Cumberland and Westmorland, it is however much more difficult to back this statement up with factual information. An attempt has however been made to do so.

Rateable value statistics were thought to be a possible means of doing this for they give figures for the rateable value of entertainment and recreational facilities separately. In Cumberland and Westmorland, however, the attractiveness of the area for the tourist is in natural not man made features as it is in Blackpool for example. It is therefore scarcely surprising that in practice this did not prove to be a very useful exercise for the proportion of rateable values in the holiday areas was not necessarily higher than elsewhere.

Employment statistics are usually used to obtain an idea of the importance of an industry to the local economy. Unfortunately, however, those engaged in catering for the needs of the tourist are not separated out in the employment statistics - some are engaged in distribution, others in transport, others in hotels and catering, others in entertainment but not all those employed in these industries cater for the needs of the tourist many will be catering for local people. Moreover in Cumberland and Westmorland a number of those who obtain part of their income from tourism also carry out other work, farming for example. Finally the boundaries of the employment exchange areas in Cumberland and Westmorland cut across the boundaries of the areas specialising in tourism.

Table 6 lists for 1963 the estimated number of insured employees in the industries related to tourism in the employment exchange areas in Cumberland and Westmorland. In the study area 27.4% of the insured employees are engaged in these industries, compared with 27.6% in the Northern Region and 31.8% in England and Wales. The relatively low proportion engaged in these industries in the study area is largely due to West Cumberland where only 18.5% are engaged in these industries. In the Keswick employment exchange area however over 50% are engaged in industries related to tourism, this compares with 51.9% in Blackpool, 54.3% in Morecambe and 50.4% in St. Annes Employment exchange areas.

Table 6: 1963: Insured employees in industries related to tourism

	Transport	Distri- bution	Hotels & Catering	Enter- tainment	Other Services	Total in Industries related to tourism
	(1)	(2)	(3)	(4)	(5)	(6)
Aspatria	83	147	32	13	49	324
Cleator Moor	178	595	71	31	118	993
Cockermouth	97	237	88	8	169	599
Maryport	346	605	167	35	129	1282
Millom	116	243	82	13	41	495
Whitehaven	843	1739	126	98	562	3368
Workington	1017	1273	298	97	511	3196
<u>W. Cumberland</u>	<u>2680</u>	<u>4839</u>	<u>864</u>	<u>295</u>	<u>1579</u>	<u>10257</u>
Carlisle	4734	4670	1453	329	2327	13513
Brampton	132	121	2	6	52	313
Penrith	1011	1476	485	208	815	3995
Wigton	117	142	57	23	175	514
<u>Carlisle</u>	<u>5994</u>	<u>6409</u>	<u>1997</u>	<u>566</u>	<u>3369</u>	<u>18335</u>
Kendal	1019	2175	1511	97	1653	6455
Keswick	93	364	709	34	229	1429
<u>Keswick/Kendal</u>	<u>1112</u>	<u>2539</u>	<u>2220</u>	<u>131</u>	<u>1882</u>	<u>7884</u>
Study Area	9786	13787	5081	992	6830	36476
Northern Region	89170	164810	13460	38070	55,300	360810
N.W. Region	235920	389340	64040	35820	128010	743130
U. Kingdom	1664190	3022790	605120	247120	1909380	7448600

Source: Ministry of Labour

The tourist industry is often said to give rise to a seasonal over-demand for labour and unemployment. The Keswick employment exchange - the only one in which tourism appears to be very important in the employment figures - is indeed subject to seasonal unemployment.

Table 7: Keswick employment Exchange - numbers unemployed in industries related to tourism

	June	December
1959	8	62
1960	1	31
1961	-	31
1962	4	42
1963	12	42

Earlier in this report it was estimated that accommodation was available in Cumberland and Westmorland for 66,341 holidaymakers. Using this figure and assuming that:-

- (1) the average length of holiday was 10 days
- (2) the area was 95% full in July and August when 65% of the main and 20% of the additional holidays were spent.
- (3) the average expenditure per head was £16. It would appear that some 668,000 persons holidayed in this area probably spending £10.7m on their holidays. The entire amount would not, however, have been spent within the study area. A later report will examine expenditure by the holidaymaker in rather more detail.

Another method of examining the importance of tourism to the regional economy is by forming a picture of the regional balance of trade in tourists

Table 8: Regional balance of trade in tourists

Regions	1960			1964		
	From regions %	To regions %	Balance	From regions %	To regions %	Balance
South West	6	17	+11	7	20	+13
South	5	13	+ 8	6	14	+ 8
Wales	5	10	+ 5	4	10	+ 6
Scotland	10	11	+ 1	10	12	+ 2
London and South East	23	15	- 8	21	12	- 9
East	8	8	0	7	7	0
North and North East	14	8	- 6	15	9	- 6
Midlands	15	7	- 8	17	7	-10
North West	14	15	+ 1	12	13	+ 1
	<u>100</u>	<u>104</u>	<u>+ 4</u>	<u>99</u>	<u>104</u>	<u>+ 3</u>

Source: Town and Country Planning, March 1965, Holiday Movements in Britain - T.L. Burton; B.T.H.A. Surveys.

Note Figures do not add up to 100 as many people visit more than one region.

On the assumption that those who holiday within a region contribute the same amount to the local economy as those who leave the region to holiday elsewhere, the North West region has a small gain from the tourist +1 c with +13 in the South West and -9 in London and the South East. It is obvious however, that there is considerable variation within the North West. Manchester for example, will have a negative balance of trade whilst the study area obviously has a positive balance.

At present the tourist industry of Cumberland and Westmorland is associated with the Lake District National Park. The resources which make a holiday in the Lake District attractive are the natural scenic resources of the area and the recreation which can be obtained in this area, walking, climbing, boating etc. In this the Lake District provides a contrast with the Lancashire coastal resorts of Blackpool and Morecambe both of which have true boast beaches, but the main attractions of these areas definitely appear man-made the cinemas, theatres, bingo, piers etc. The Lake District in the future obviously poses sizeable problems if it is to absorb increased numbers of tourists in the future without the destruction of the natural landscape.

The tourist potential of a) the Cumberland Coast and b) the Pennine foothills have not, however, been realised as yet.

The Cumberland coast does of course attract a certain number of holidaymakers already - and has as we have already noticed a certain provision in the way of hotels, caravan sites etc. At present it is however used as a local not a national recreational asset. The coast may be divided into the south western coast from St. Bees head southward and the northern Solway coast from Maryport to Burgh by Sands. At present there is greater provision for the tourist on the Solway coast than in the southern area. The Cumberland County Council in proposing that the Solway coast from Maryport to Burgh by Sands should be created an area of Outstanding Natural Beauty, have suggested that the planned development of tourism in this area might firstly solve the economic ills of the area and secondly secure that the development of the area progresses in such a way that the natural amenities of the area are not destroyed.

The Pennine foothill country in North Westmorland R.D. and Alston with Garrigill is an area with undoubted scenic attraction. At present a great deal of the enjoyment of those who visit the area is obtained because the area is as yet uncommercialised. In suggesting a greater use for this area, care must be taken so that it is not over-utilized - for there is a maximum degree of utilization consistent with all types of recreational use (these standards have been worked out, to a certain extent, in America, but no attempt has been made to do so in this country).

Thus Cumberland and Westmorland appears to be an area which has considerable natural attraction for the tourist. In much of the Lake District the tourist potential has been realised to a considerable extent; elsewhere on the Cumberland Coast and in the Pennine foothills there is a considerable undeveloped potential.