



7

Marketing and
Tourism

SECTION 7 - MARKETING AND TOURISM OPPORTUNITIES

Introduction

This section covers tourism trends and market factors, which provide a context for development planning at Canal Head and along the canal corridor. It considers visits by tourists, as well as residents of the Ulverston area. Tourists include people staying in the area and tourism day trips, which are defined as leisure visits of three hours or more and not taken on a regular basis. In addition there are many local trips of shorter duration and undertaken regularly by local people. The canal corridor is an important resource for local people and the development options must consider their interest and offer local people, as well as visitors, enhanced opportunities for leisure.

The section contains the following:

- Outline of current tourism opportunities
- Tourism trends and forecasts
- Tourism policy and target markets
- Potential tourist demand for development at the canal
- Tourism development proposals

7.1 Outline of current tourism opportunities

Ulverston is a historic market town of great character and has a growing reputation as a festival town. Its range of attractions includes the town centre itself, with a network of cobbled streets and ginnels, speciality shops and some fine buildings including the Lantern House (home of the innovative arts group, Welfare State International) and the Coronation Hall. Ulverston was the birthplace of Stan Laurel, and

today the Laurel & Hardy Museum is one of the main tourist attractions. The town has an indoor market and a street market on Thursdays and Saturdays. The Lakes Glass Centre near Canal Head offers visitors the opportunity to see glass being made at two adjoining factories - Heron Glass and Cumbria Crystal – and also contains a local information exhibition and a restaurant. Overlooking the town, the Sir John Barrow monument on Hoad Hill gives wide views across Morecambe Bay and the Lake District fells. Ulverston is the start of the Cumbria Way, a 70 mile long-distance footpath through the Lake District to Carlisle.

Ulverston lies south of the Lake District National Park in the area known as Furness, which is currently promoted as 'The Lake District Peninsulas'. This also covers Barrow-in-Furness, Grange-over-Sands and Cartmel. Attractions in the Lake District Peninsulas include The Dock Museum in Barrow, Holker Hall, Conishead Priory, Gleaston Water Mill, the Lakeside & Haverthwaite railway and the South Lakes Wild Animal Park. The Lake District National Park offers a wide range of attractions for tourists and stiff competition for attractions in and around Ulverston. The Lake District Peninsulas Tourism Partnership undertakes a programme of marketing to attract more visitors to the area.

Tourist accommodation in Ulverston is limited, in comparison to some of the towns nearby. There are several guest houses, B&Bs, small hotels and self-catering establishments and a hostel.

The Ulverston Canal is often overlooked by visitors, yet enjoys a reputation as the world's 'shortest, widest and deepest' canal. The walk along the towpath is rewarded at Canal Foot by excellent views across Morecambe Bay and refreshment at the Bay Horse Hotel. The towpath is used mainly by local people, for walking, jogging, exercising dogs, fishing and informal cycling.

Access to Canal Head for most people is pedestrian only and there is no obvious car parking close by. Access to Canal Foot by car is tortuous. Cycling is not legally permitted on the tow path. Boating is not normally allowed on the canal. There is little interpretation of the historical interest of the canal and its buildings. The combination of limited access and the poor environment of parts of the canal have meant that the opportunity for the canal to become a significant attraction for tourists has not yet been realised.

7.2 Tourism trends and forecasts

Volume & Value of tourism in the Lake District Peninsulas

In 2003, an estimated 3.8 million tourists visited the Lake District Peninsulas². This area includes South Lakeland outside the Lake District National Park together with Barrow Borough. These visitors generated a total of 5.5 million tourist days, slightly down on the previous year. They spent a total of £226.8 million (including indirect expenditure), which supported an estimated 10,887 jobs (full time equivalent).

Volume & Value of tourism in South Lakeland

Ulverston also attracts day visits by people staying on holiday elsewhere in South Lakeland, especially the Lake District National Park.

In 2003, an estimated 4.9 million tourists visited South Lakeland. They generated a total of 11.2 million tourist days, up significantly from 9.9 million in 2000. They spent a total of £481.4 million (including indirect expenditure), which supported an estimated 10,887 jobs (full time equivalent). The total number of jobs supported by tourism in South Lakeland (including both full time and part time jobs) is estimated at 18,725. In real terms, the value of tourism in

² STEAM (Scarborough Tourism Economic Activity Monitor) model data for 2003, Cumbria Tourist Board, 2004

South Lakeland has risen by 17.4% during the period 2000 to 2003, much more than the 12.9% increase for the county as a whole. In 2003, South Lakeland had 48,122 bedspaces in tourist accommodation (15,272 in serviced accommodation and 32,850 in non-serviced).

Forecasts

The main focus for tourism in Cumbria is the countryside. There has been a growth of interest nationally in countryside holidays and greater participation in rural activities, particularly walking, cycling and wildlife watching³. This is being stimulated by greater interest in the environment, promotion of the health benefits of exercise and the development of new opportunities for walking and cycling, including the National Cycle Network, which is set to achieve 10,000 miles of new signed, safe and attractive cycle routes in the UK by the end of 2005.

Locum Consulting forecast that from 2000 to 2010, staying trips to Cumbria will increase by 23%⁴.

Cumbria Tourist Board forecasts that over the next ten years (2005 to 2015), the value of tourism in the county will double, from £1 billion to £2 billion.

Conclusion – Tourism trends and forecasts

- Substantial growth in tourism in Cumbria is forecast, with a doubling in value over the next ten years
- Tourism in South Lakeland has increased faster than the county average
- This indicates potential demand for new tourism facilities in Ulverston, including accommodation, attractions and events. However, the forecast increases cannot

be taken for granted. Ulverston's tourism industry will need to continue to improve the quality and range of its tourism offer to obtain its share of the predicted growth

7.3 Tourism policy and target markets

Strategies relating to tourism in South Lakeland are set out in policy and research documents produced by the local authorities, NWDA and CTB. They include the following:

- The Strategy for Tourism in England's North West, NWDA, 2003
- Regional Tourism Strategy for Cumbria, Cumbria Tourist Board, 1998
- Cumbria Tourism Market Forecasts, Locum Destination Consulting, for CTB, 2003
- Lake District Futures, Regeneris Consulting for NWDA, 2004
- Cumbria & Lake District Joint Structure Plan
- South Lakeland Local Plan
- Morecambe Bay Interpretation & Marketing Strategy, Morecambe Bay Partnership, 2002

The common threads of policy in these documents need to be taken into account in the future development of tourism in South Lakeland. There is general support for the following aims:

- To develop tourism in a sustainable way, to bring greater benefits for the economy, the local community and the environment
- To improve the quality of the tourism product and infrastructure

- To spread the benefits of tourism from the central Lake District to other parts of the county, including the Ulverston area
- To extend the tourist season and increase the number of year-round jobs

The NWDA and CTB have established a 'star brand' approach to marketing. This aims to attract visitors to the region using 'attack' brands (one of which is the Lake District), then to disperse them to other, less well-known parts of the region, using 'slipstream' brands (including the *Lake District Peninsulas*, in which Ulverston is located).

Target markets

The most detailed market analysis recently has been undertaken by Locum Destination Consulting (for CTB's Market Forecasts)⁵. Locum Consulting recommended the following market priorities to achieve their growth forecasts:

- **Staying visitors** – they are much more valuable than day visitors
- **Post-family couples** – a growing market and can help secure midweek business
- **MICE (meetings, incentives, conferences and exhibitions)** – likely to be a growing market in the long term and will be particularly important in urban areas and along the M6 corridor
- **Upper socio-economic groups** – they have a much higher propensity to visit Cumbria and are higher spenders. (At the same time, there are important sectors of the county's product that depend upon the lower socio-economic groups, so they should not be ignored)

⁵ Cumbria Tourism Market Forecasts, Locum Destination Consulting, 2003

³ Insights Tourism Marketing Intelligence, Visit Britain

⁴ Cumbria Tourism Market Forecasts, Locum Destination Consulting, 2003

- **People living within two or three hours drive time** – they have a much higher propensity to visit and this is likely to be accentuated as short breaks become the norm
- **Activity and eco-oriented customers** – they are likely to be growing markets, but are also important in terms of updating the image of the county; in line with the core values of the area

Locum recommended that six product/market segments should be focused on to develop the tourism industry in Cumbria – each being a combination of the physical product offer and the type of customer it appeals to:

- **Seaside and Countryside Holidays** – the traditional long-stay, young family and post-retirement holiday business, focused on the Cumbrian Coast and the Lake District. They attract mainly the C, D socio-economic group, primarily from the Midlands and the North
- **Rural Getaways** – character cottages and high quality B&Bs attracting an A, B, C1 audience for 7 day, or sometimes shorter stays. Families and couples. Includes people who are into serious walking, etc, but also those who like a broad range of leisure and cultural activity in a quiet and beautiful environment
- **Sophisticated Short Breaks** – affluent pre- and post-family customers, mainly from urban areas, who like to take short breaks in high quality hotels
- **Active Outdoors** – people who come to Cumbria for serious physical activity, especially walking
- **Overseas Visitors** – dominated by North Americans and Australians, typically stay for a short time in serviced

accommodation

- **Conferences and Exhibitions** – for establishments which offer specialist facilities

These market priorities are likely to be the focus of tourism promotion in Cumbria over the foreseeable future. Growth in these sectors is therefore to be expected.

The Lake District Peninsulas Tourism Partnership is focusing on the following target markets:

- **The ‘family fun’ market** – seeking to attract families with activities to entertain the children
- **Retired people**, who have been the loyal market for the area over many years
- **Coach visits**, which the Partnership has worked hard to develop, although the market has declined due to competition from cheap flights to destinations abroad
- **Short breaks**, attracting customers mainly from an area including Yorkshire and the North East
- **Day visits**, from as far afield as Manchester and Fylde

The Morecambe Bay Partnership aims to raise awareness and understanding of Morecambe Bay’s heritage and encourage sustainable tourism to benefit the local economy.⁶ This is likely to attract to Ulverston and the canal additional visitors who are interested in the environment and history of the Bay. It offers encouragement for the development of tourist facilities linked to those themes. The Morecambe Bay Interpretation & Marketing

⁶ Interpretation & Marketing Strategy for Morecambe Bay, Morecambe Bay Partnership, 2002

Strategy identifies Canal Foot, Ulverston, as a primary outdoor location for interpretation, because of its good views across the sands and its strong associations with the main themes and stories of the Bay.

The Morecambe Bay strategy identifies the following target groups:

- Families with children aged up to 12
- Reasonably affluent ‘empty nesters’
- Holiday makers interested in outdoor activities, especially walking
- Special interest visitors, especially bird watchers

These target groups are consistent with the groups selected by the Lake District Peninsulas Tourism Partnership.

Conclusion – Tourism policy and target markets

- Tourism development at the canal would be consistent with tourism policy, as it would help to spread the benefits of tourism to the Lake District Peninsulas and extend the tourist season. Development here could also help to raise the profile of Morecambe Bay’s heritage
- Tourism development needs to be related to the target markets adopted by the agencies promoting tourism in Cumbria and the Peninsulas

7.4 Potential tourist demand for development at the canal

Catchment population

Most visitors to new tourism related development at the canal are likely to be day visitors from home or from holiday bases

outside Ulverston. National survey data indicate that the great majority of leisure day trips to the countryside involve visits to sites within 20 miles of home. Indeed, 90% of all leisure day visits to the countryside from home fall into this category, with two thirds of all trips being to sites within 5 miles of home. However, if regular and shorter trips are excluded, then tourism day trips⁷ show a slightly different profile, with 72% visiting sites within 20 miles and a further 21% visiting sites of between 20 and 50 miles from home. The available data from national surveys suggests that day trips from holiday bases are likely to have a similar profile to tourism day trips from home.

On this basis it is possible to define the likely catchment population from which visitors to Canal Head would be drawn. The area within 20 miles by road to the site comprises Barrow Borough, most of South Lakeland and the southern part of Copeland Borough. The resident population of this 20-mile zone is approximately 175,000. The 50-mile zone comprises most of the county of Cumbria, together with the northern part of Lancashire and parts of North Yorkshire. The population of the 50-mile zone is around 1 million⁸.

The site has a substantial catchment of tourists staying on holiday within 50 miles, some of whom could be attracted to Ulverston. Cumbria received 5 million staying visitors (staying 18 million days) in 2003⁹. However, the potential market penetration amongst staying visitors and day visitors is constrained by the existence of a range of competing opportunities, particularly those available in the Lake District National Park, although the town, the canal and the coast offer experiences which are complementary to lakes and mountains.

Comparator attractions & estimate of

⁷ Tourism day trips are defined as those leisure trips lasting at least 3 hours in duration and taken on an irregular basis.

⁸ Census, 2001

⁹ Cumbria Tourist Board STEAM report, 2004

visitor numbers

Comparator attractions	Visitor numbers, 2003	Adult entrance charge
Windermere Lake Cruises	1,337,879	various
South Lakes Wild Animal Park, Dalton in Furness	228,901	£9.50
Aquarium of the Lakes, Lakeside, Windermere	200,000	£5.95
Lakes Glass Centre (Heron Glass) (2002)	170,879	Free
Grizedale Forest Park	140,262	Car park charge
Lakeside & Haverthwaite Railway	120,000	£12.00
Leighton Moss RSPB Reserve (Lancashire)	104,480	£4.50
Lake District Visitor Centre, Windermere	89,139	Car park charge
Dock Museum, Barrow	85,098	Free
Muncaster Castle	81,301	£7.80
Sellafield Visitor Centre	76,729	Free
Cartmel Priory	62,322	Free
Sizergh Castle	60,645	£5.00
Steam Yacht Gondola, Coniston	37,173	£5.80
Lakeland Motor Museum, Cark	36,824	£6.50
Lazerzone, Barrow	30,572	£3.95
Bardsea Country park, Barrow	20,000	
Laurel & Hardy Museum	20,000 (2001)	£3.00
Furness Abbey	13,748	£3.00
Heron Corn Mill	1,543	

Estimates for visitor numbers at Canal Head should take account of numbers at established attractions in the area, as well as market trends and catchment population. The table below features a range of attractions and visitor

centres in the south of Cumbria. (Note that not all attractions submit their visitor statistics to the tourist board)¹⁰.

The highest attendances are at the larger attractions which have had major investment. The attractions in or near the Lake District benefit from the National Park's international reputation.

South Lakes Wild Animal Park and the Dock Museum demonstrate the potential to achieve substantial visitor numbers in the Lakeland Peninsulas (228,901 and 85,098 respectively).

Cumbria Tourist Board and the Lake District Peninsulas Tourism Partnership consider that there is room for more attractions in Ulverston, which would create a critical mass and exert a stronger pull for visitors, rather than causing competition which may dilute the customer base at the existing businesses. This is supported by the predicted growth in the market described in the earlier section.

Most of the attractions in Cumbria are small scale. Around half of the attractions in the county receive between 10,000 and 50,000 visitors per year.

Conclusion – tourist demand for development at the canal

- Prospects for building a strong customer base for tourism development at the Canal are enhanced by the predicted growth in the number of staying visitors in Cumbria: the forecast doubling of Cumbria's tourism revenue over the next ten years would generate demand for new development at the canal
- The main drawbacks of the location are the relatively low catchment population, remoteness from the main centres of visitor activity in Cumbria and a low level of awareness of the canal amongst

¹⁰ Visits to Visitor Attractions 2003, Visit Britain, 2004.

tourists. The proposed Gateway Visitor Centre near junction 36 on the M6 will intercept people heading for the Lake District, so there will be the opportunity to promote Ulverston and encourage visitors to look more widely than the Lake District

7.5 Tourism Development Proposals

To address the tourist demand identified in the market analysis above, options for development include the following:

- **Visitor centre to interpret local heritage** (maritime, industrial, cultural and wildlife). Canal Head could provide a new co-location for the Laurel & Hardy Museum and the Ulverston Heritage Centre. At Canal Foot there are plans to develop a heritage centre featuring the canal in the Lock Keepers Cottage and to display the 'Hearts of Oak' boat, which could also offer boat trips
- **High quality waterfront development around Canal Head** for tourism and other uses would create interesting spaces, reflections and views to attract visitors. Public access to the waterside should be created or maintained
- **Facilities for walking** – New paths to create short circular routes, improved access to the west bank of the canal, country park facilities including woodland planting, and countryside interpretation. Ulverston is already on the keen walker's map: it is the start of the Cumbria Way, the Cumbria Coastal Way passes Canal Foot and in April there is the Ulverston Walking Festival. The area's main target markets, including families and older people, would be attracted by short, easy circuits of a mile or two, with an obvious starting point, good surfaces, clear signage and accessible for prams and wheelchairs. The largely traffic-free

canal towpath, with its wildlife and heritage interest, could be at the heart of a local network of circular walks from a visitor centre at Canal Head

- **Facilities for cycling** – Create the Ulverston 'cycling hub' envisaged in the Cumbria Cycling Strategy, which identifies excellent cycling opportunities within the Furness Peninsulas, with possible routes into the Coniston area. The canal towpath offers safe cycling, which would appeal to the family market. It could be the basis for creating short, circular routes and links to the wider cycle route network. The Walney to Wear cycle route opened in June 2005 and cycling charity Sustrans expects 12,000 people a year to ride through Ulverston. Development at Canal Head could include secure cycle parking and storage, changing and clothes drying facilities, meeting point, cycle hire and car parking. It would be desirable to formalise cycling on the tow path perhaps through the Greenways Initiative
- **Canal Foot viewpoint shelter** - To highlight the magnificent views across Morecambe Bay and improve interpretation of the wildlife and heritage of the Bay. It would also be a focal point for people walking and cycling along the canal and the Cumbria Coastal Way
- **Boat trips and boat hire** on the canal would appeal to target markets. Interesting activities for children will be crucial to attracting the family market and securing repeat visits
- **Arts & crafts** will appeal to the target markets, especially families, older people and groups. **A sculpture trail and public art** could be developed along the canal and to help link the town centre and Canal Head. There could also be a

thematic link with the public art at Morecambe, helping to raise the profile of Ulverston as a destination in the Morecambe Bay area. **A craft village**, bringing other artists and craftspeople to complement the glass makers already at Canal Head, would create critical mass to attract more people to the town

- **Festivals and events** – Space could be provided at Canal Head for festivals and events linked to the natural and cultural heritage of Ulverston, to enhance its reputation as a festival town
- **Enhance the livestock market** – To provide an experience for visitors, to view the animals and see auctions taking place. This could be a popular attraction for families and, with interpretation, could help to improve awareness and understanding of South Lakeland's farming industry and local food products
- **Additional refreshment facilities** at Canal Head to meet increased demand. Waterfront locations for restaurants and cafes are particularly attractive and contribute to a lively sense of place. The aim should be to extend the range of facilities, rather than duplicate existing provision in the area
- **Accommodation** - To provide for visitors staying in Ulverston, there is likely to be demand in the future for some new accommodation, if the town is to attract its share of the predicted overall growth in the county. **A landmark hotel on the waterfront**, with around 50 rooms offering good quality, medium priced accommodation, would meet the needs of business visitors, group travel and independent visitors. There is local demand too for a venue for functions, which could be provided by a hotel of this nature. There also appears to be demand for additional

hostel accommodation. (This is being considered elsewhere in the town, at Ford Park House, as one of a number of options for the listed building)