Discover the Extraordinary
Project Evaluation

www.cornishmining.org.uk
OVER £1M WAS INVESTED INTO IMPROVING THE FACILITIES AT 11 CORNISH MINING VISITOR ATTRACTIONS AS WELL AS IMPROVING THE ONSITE INTERPRETATION TO HELP VISITORS UNDERSTAND THE STORY OF CORNISH MINING.

THE PROJECT ALSO INVESTED MONEY INTO PROMOTION OF THE CORNISH MINING WORLD HERITAGE SITE AS A TOURISM DESTINATION

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In 2006 ten selected mining landscapes across Cornwall and west Devon were inscribed as a UNESCO World Heritage Site, placing Cornish mining heritage on a par with international treasures like Macchu Pichu, the Taj Mahal and the Great Wall of China.

The largest World Heritage Site in the UK, with almost 20,000 hectares spread across Cornwall and west Devon, it offers myriad experiences to explore our world-changing mining culture.

The Cornish Mining World Heritage Site (CMWHS) is managed by a Partnership Board comprising Cornwall, Devon County and West Devon Borough Councils, plus the National Trust and the Cornwall and Tamar Valley AONBs. The Board’s role is to draft and implement a Management Plan, and deliver projects that protect and present our World Heritage landscape.

Sustainable tourism, that responds to, communicates and supports the special nature of the mining landscape, is integral to this role. But with such a diverse Site, in multiple ownerships, and limited core resources, a substantial co-ordinated investment was needed to unlock the potential of the World Heritage Site status. In 2007 the Rural Development Programme for England (RDPE), funding opened, and the World Heritage Site submitted an Expression of Interest that identified the need for an integrated approach to tourism product improvement, business engagement and promotion. This resulted in the invitation to submit a full bid, as part of the Rural Tourism commissioning strand.

The resulting £2.4m ‘Discover the Extraordinary’ (DtE) project began in January 2010. Over £1m was invested in improving the facilities at 11 partner mining visitor attractions as well as improving interpretation of the wider landscape to help visitors understand the story of Cornish mining. The Project also invested money into building new relationships across the tourism sector and promotion of the Cornish Mining World Heritage Site as a tourism destination.

This has had a significant impact not only on the 11 visitor attractions but also the wider Cornish Mining Attractions Marketing Association (CMAMA) membership, and has supported business growth in a range of tourism partners across the whole supply chain. The key performance measures, defining achievement against the original 11 Project Outputs, are reported in section 2.

This section summarises some of the main activities delivered as part of the DtE project promotion strand.

1. Marketing

The funding bid included a Marketing Plan, produced in consultation with the World Heritage Site Marketing Steering Group. This identified the most cost effective combination of marketing actions and tools to deliver an uplift in awareness of the Cornish Mining World Heritage Site destination offer and convert this into increased motivation to visit by people from outside the South West.

Building on the established Cornish Mining brand, the main marketing activity included:

- Digital and internet marketing
- Advertising
- Business engagement
- PR
- Print based communications

1.1.1 Website

The new Cornish mining website was launched in 2011 which was met with rave reviews from one of the leading publications for interactive media – New Media Age - scoring the Cornish Mining World Heritage Site website 92/100, the highest score awarded to date at that time.

We have also implemented an innovative website ‘widget’ which local businesses have embedded into their websites to enhance the visitor experience by adding rich content, including area information, highlights and activities within each area of the World Heritage Site. We currently have just over 120 businesses displaying our widget.

Following on from the success of the widget, we commissioned a digital design agency to produce a joint web wrapper/widget in partnership with...
the South West-based World Heritage Sites and the South West Coast Path. The production of the wrapper is now complete and a marketing agency has implemented a marketing plan to encourage local businesses to embed the new widget on their website. A training website has been created for this purpose: http://www.swoutdoormap.info/ and we will be monitoring the number of downloads on an ongoing basis.

The website continues to be an excellent resource with an average of over 68,000 unique users a year and we will continue to monitor the usage to ensure it is performing well.

1.1.2 Audio Trails
To allow visitors to delve deeper, the Cornish Mining World Heritage Site produced an innovative selection of audio trails across Cornwall and west Devon that made use of smart phone technology. Users can simply download the trail from the Cornish Mining World Heritage Site website and listen to narratives from Cornwall & west Devon’s industrial heyday, told by ex-miners, local historians and actors.

1.1.3 Consumer app
In June 2012, we also launched ‘Cousin Jacks – The Cornish Mining App’ to the iPhone & Android market. The free app, named after Cornish miners who migrated globally for work and became known as “Cousin Jacks”, was developed to help visitors to Cornwall and west Devon delve deeper into Cornish mining heritage and explore the lives and the locations within. Users can now enjoy fun, interactive features, games for children and audio trails which provide a fresh, engaging and innovative way to explore the landscape and experience what it was like back in the heyday of hard rock mining. The app has received approximately 3,000 downloads since its launch.

1.1.4 Digi-Guide
Additionally, we have produced a ‘Digi-Guide’, an online magazine showcasing each of the ten Areas of the World Heritage Site. The Digi-Guide is an online, interactive magazine which utilises HTML/HTML5 technology and allows content to be browsed and navigated in a more page-based format. It includes information on areas, attractions and activities in the World Heritage Site but also has embedded audio, video and link features like a web page. This is viewable online and through mobile telephone, plus is downloadable and can be used without an internet connection. It can also be emailed to recipients.

1.1.5 Films
In 2012, we commissioned a series of postcard ‘sizzle’ videos for the Cornish Mining World Heritage Site and the other South West World Heritage Sites and UNESCO Designations. We commissioned Visit England to deliver a national media campaign using this marketing tool for all SW partner UNESCO sites, including large media platforms such as www.dailymail.co.uk and www.theguardian.com. The campaign ran for 3 weeks and generated 1,905 unique visits to the Cornish Mining World Heritage Site website. The films, which showcase each area within the Cornish Mining World Heritage Site, now appear on the Cornish Mining World Heritage Site website to introduce the areas to potential visitors.

1.1.6 Social media
Facebook
We now have 415 ‘likes’ of our page and we use our Facebook page to share details of news and events at CMAMA attractions as well as keeping in touch with our international followers.

Twitter
We currently have 748 followers on our Twitter account. We use Twitter to communicate more with businesses i.e. promoting familiarisation trips, networking etc.

2. Advertising
We ran a number of advertising campaigns with publications and media platforms which had a national or international audience. These have been highlighted below.

2.1 Cornwall Today – readership of 34,000 per issue
We ran a twelve month series in Cornwall Today throughout 2012, each article featuring on an area within the World Heritage Site.

2.2 Devon Life – 9,100 copies delivered to readers each month
We ran a 6 month campaign in Devon Life to promote the attractions, activities and events within the Tamar Valley area of the World Heritage Site, with a particular focus on the recently opened Tamar Trails Centre.

2.3 National Trust Magazine- 3.9 million Trust members
In 2011, a World Heritage Site advert was placed in the National Trust magazine which was sent out to their database of 3.9m readers. We selected this publication because of the demographic of the readership and also to highlight that National Trust properties are a significant part of the overall Cornish Mining World Heritage Site offer.

2.4 Visit Cornwall Guide – readership of 130,000
We booked a full page advert in the 2011, 2012 and 2013 Visit Cornwall Guides, the most recent of which featured a 4 page editorial piece on the World Heritage Site.
2.5 myCornwall – readership of 62,000 per issue
We ran three branded editions of myCornwall throughout the Project which involved tailoring the design and content within the Cornish mining theme, each edition focusing on a different area within the World Heritage Site (west Cornwall, mid Cornwall, east Cornwall and west Devon). This was a good way of showcasing the many elements of the Cornish Mining World Heritage Site offer which is sometimes difficult to get across in a one page advert.

2.6 Flybe Magazine
We secured space for editorial and a competition in the on-board Flybe magazine, which was also produced in digital format. The competition, in association with Cornish Farm Holidays, took place in November 2012 and we had approx 4,500 entrants.

The competition was also picked up by the moneysavingexpert.com forum, as well as competitioncompanion.com and hotukdeals.com.

2.7 Cornish Pirates calendar
The Cornish Mining World Heritage Site has sponsored the official 2014 Cornish Pirates calendar, which was launched at the end of November. Each month features one or more of the players in one of the areas within the World Heritage Site. We chose to sponsor this product because it would give the Cornish Mining World Heritage Site exposure to the Cornish Pirates’ national and international loyal following. We also negotiated an agreement with the Cornish Pirates that 50% of the proceeds of each calendar sold would be donated to the Cornish Mining World Heritage Site to protect and preserve the mining landscape.

3.0 Business Engagement
Over the last 2 years, the Cornish Mining World Heritage Site team has been working closely with tourism providers across Cornwall and west Devon.

The Project has reached more than 400 local tourism providers so far and some valuable working relationships have been established, with many tourism businesses showing lots of enthusiasm and passion for the Cornish Mining World Heritage Site.

3.1 Familiarisation trips
A key element of the business engagement programme has been to run a series of free ‘familiarisation trips’, where local tourism businesses can find out about Cornwall’s mining heritage but also the globally significant impact of having World Heritage Site (World Heritage Site) status. The familiarisation trips include guided tours of visitor attractions, a coach tour of the wider mining landscape and a lunch during which any questions are answered. The familiarisation trips were a great opportunity to build relationships with tourism providers and inspire them to want to get more involved in the Cornish Mining World Heritage Site.

Encounter Walking Holidays, a bespoke walking tour company, attended a familiarisation trip. As a result, Damon Willcox, owner of Encounter Walking Holidays, subsequently decided to introduce a new tour based on Cornwall’s mining heritage. Damon said “Being offered the opportunity to explore Cornwall’s unique heritage was something I jumped at. Being shown around and learning so much was a real luxury. I’m thrilled to be able to pass on what I gained from the familiarisation trip to future visitors.”

3.2 Champions programme
Following on from the success of the familiarisation trips, and the feedback received from tourism businesses, it became clear that there was a real interest in finding out more about the history of Cornish mining. Working in collaboration with CoaST, a ‘World Heritage Site Champions’ programme was developed. The programme train local tourism providers and arm them with the necessary information and resources to be ‘ambassadors’ for the World Heritage Site. The intention is that the Champions would only share this information with visitors, but also motivate and inspire other local businesses to promote the Status among visitors to Cornwall. We now have more

4. Public Relations
Engaging PR, targeted at national and international outlets, was identified as one of the most cost effective means of engaging with potential visitors to Cornwall and the Tamar Valley. A more detailed PR report appears as a separate report, but highlights included:
- Competitions in national media offering accommodation with DtE partner businesses
- Press pack to encourage and support visiting journalists
- Articles in the travel sections across a range of media
- Articles in specialist publications such as Cycling Weekly, Heritage Railway

5. Print based Communications
The DtE project promotional focus was on enabling the Cornish Mining World Heritage Site and partners to utilise the growth of digital marketing, which can reach a wide range of national and international audiences. However, there is still a role for printed communications, particularly for visitors when they are in the region, to enable cross marketing of project participants. The DtE project funded joint CMAMA leaflets in 2010 and 2011, distributed to all members and key outlets such as railway stations and Tourism Information Centres.

6.0 Food and Drink Partners
In 2013, we began looking for strategic partnerships with local food and drink producers to expose the Cornish Mining World Heritage Site to new audiences, to reinforce the strong link between heritage, culture & food and drink, and to generate an income for the future for protecting and preserving the Cornish Mining World Heritage Site.
We worked alongside Cornwall Food & Drink and its membership and negotiated contracts with 7 food & drink producers in total which will each run for the following 2 years. Each agreement involved the Cornish Mining World Heritage Site investing in an existing product, or sponsoring an existing product. Each sponsored product now carries the Cornish Mining World Heritage Site logo, along with the website address and a line of text to explain that the amount would be donated to protect and preserve the Cornish Mining World Heritage Site by the food or drink producer.

In addition to the obvious benefits in having an income generation mechanism going forward, the visitor gifting initiative was very well received by the press, reaching audiences of approximately 2,217,005 readers, through the work of our PR agency, Excess Energy. For further details of PR coverage and PRV, please see the PR report in the appendix of this report.

Cornish Crisps

We have sponsored the pasty flavoured crisp ‘The Prop-a-tater’ made by the Cornish Crisp Company. For each bag sold, the Cornish Mining World Heritage Site receives 1p per bag sold. To date, they have sold over 4000 bags of crisps. Unlike the other agreements, this contract is open-ended so there is no official end date. We will continue to work with Cornish Crisp Company for as long as it is mutually beneficial to do so.

Furniss Biscuits

Furniss Biscuits has excellent distribution networks both nationally and internationally and they are introducing new ‘snack bags’ to their product line. We have sponsored four flavours of ‘snack bags’ as well as their rebranded, high end chocolate ginger biscuits. The contract began on 1st January 2014 so we do not have sales to date but we will receive 1p per snack bag sold and 2p per box of chocolate ginger biscuits.

Polgoon

As an established cider producer in Cornwall and recognising the fast growth of the cider market in Australia, Polgoon launched a new cider for the Australian market, ‘Cousin Jacks’. The cider will also be launched in the UK in the first quarter of 2014. The Cornish Mining World Heritage Site will receive 1p from each bottle sold in Australia and the UK. We do not yet have details of Australian sales figures for the first 3 months of the partnership but we will receive this information in February 2014.

Buttermilk Confections

Having recently gone through a full rebranding exercise, Buttermilk Confections was keen to link with the Cornish Mining World Heritage Site in order to enhance their brand and gain exposure to the heritage market. We have sponsored three products within their range of fudge and we will receive 2p per unit sold. The agreement commenced on 1st January 2014 so we do not have sales figures to date.

Skinner’s Brewery

We approached Skinner’s Brewery as they are one of the most well known breweries in the South West. We were keen to sponsor their existing ‘Cornish Knocker’ ale for its obvious links to the mining industry. We now receive 1p per pint of Cornish Knocker sold across the UK and they have sold over 2,000 pints since the agreement began.

Lynher Dairies

Cornish Yarg is an iconic cheese brand in Cornwall so we were keen to work in partnership with Lynher Dairies on a sponsorship deal. Because of the nature of their product packaging and that it is often bought in bulk by delicatessens, we agreed that it would be not be possible for each piece of cheese to carry the World Heritage Site logo but that Lynher Dairies would produce some promotional cards which would explain the link with the Cornish Mining World Heritage Site and this card would be sent out with each piece of cheese. Lynher Dairies will be donating 3p per each piece of cheese sold (regardless of size) and we will receive details of sales figures by the end of February 2014.

Pasty Presto

We were keen to have a pasty within our sponsored range for its obvious connections to Cornwall and Cornish heritage. We negotiated a deal with Pasty Presto which involved them creating a new product, ‘the travelling pasty’, and donating 5p per pasty sold. The ‘Travelling Pasty’ is themed on the Cornish diaspora and the spread of Cornish mining across the globe. They have been working on the product development phase of the process and will be launching the new pasty imminently.

Simply Cornish Hampers

Once we had negotiated the agreements with the individual food & drink producers, we were keen to package up all of our sponsored products into a hamper. We negotiated an agreement with Simply Cornish Hampers that they would sell our ‘Heritage Hamper’ on their website and they have agreed to donate 10% from each sale. Therefore, we will receive an income generation from the hamper itself but also from the individual products sold within the hamper.

The following section includes a full analysis of what impact the above promotional activity, as well as the investments made into capital and interpretation facilities at partner attractions, has had on the visitor attractions, the tourism industry and the Cornish Mining World Heritage Site as a landscape designation.
UNESCO states that a world heritage site is ‘cultural and natural heritage around the world considered to be of outstanding value to humanity’. Designated with World Heritage Site status in 2006, the Cornish Mining landscape of Cornwall and West Devon comprises ten distinct areas – a ‘serial’ World Heritage Site – of 19,700 hectares, home to around 85,000 residents and is the largest World Heritage Site in mainland Britain. Its universal value was rooted in its industrial heritage story of mining, finding, and using our extraordinary suite of minerals, its role as principal producer of tin and copper, its contribution to a revolution in steam & mining technology, and the resulting world-wide transfer of technology, culture and its impacts.

This status requires Cornwall and west Devon areas to preserve the outstanding universal value via intelligent protection, conservation and enhancement; and to encourage social benefit through public awareness, local community participation and international co-operation. Securing funding from RDPE in 2009 for the Discover the Extraordinary 3.5 year programme has enabled Cornwall and west Devon to re-celebrate its truly exceptional industrial and social heritage, and enable the story of Cornish mining to begin to transform the areas’ sense of place on both a local, and global level.

This report considers the activity of this programme against a range of social, economic and environmental objectives. The programme set out to develop an holistic approach to cultural tourism, combining the world-changing achievements of the Cornish mining story, with the contemporary increasing interest in the narrative of our social, technical and economic change; and meshing the offer of the inland landscapes with the pull of the better known coastline. The report considers the social, economic and environmental impact of the Discover the Extraordinary programme, and in particular its role as a catalyst in generating long term benefits to the World Heritage Site area’s host communities, its cultural assets and its visitors. The objective of truly sustainable tourism is to contribute to resilient communities, knowledgeable about and proud of a shared heritage, able to fully participate in the tourism infrastructure, and with a deep interest in protecting and enhancing the asset for all.

Wheal Peevor (Image: Kirstin Prisk)
2 Project background

The Discover the Extraordinary Project was a four year programme of investments (2010-2013) across Cornwall and west Devon developed and managed by the Cornish Mining World Heritage Site Office to enhance the visitor experience in the World Heritage Site.

It was funded by a European Union and DEFRA grant through the Rural Development Programme for England (RDPE), supplemented by additional funding from the Cornish Mining World Heritage Site Partnership Board and private sector contributions. Cornwall Council acted as accountable body.

The RDPE funding was awarded through the Sustainable Rural Tourism theme, managed by DEFRA, which aims to assist the growth of environmentally sustainable tourism in rural areas.

The Offer Letter for the RDPE funding requires the Final Report to offer:

- A summary of the achievements of Outputs, Outcomes and Objectives of the Project to 31 December 2013
- A commentary highlighting lessons learnt, key successes achieved during Project, and disappointments or failures encountered

3 Overall synopsis

The programme began and operated in the midst of the most extreme financial recession since the 1930s, and found itself in the turmoil of a rapidly changing and highly unpredictable environment in terms of visitor behaviour, visitor interests and visitor spend.

This turmoil is reflected in the data that has been generated throughout the project. The programme also had to contend with a shifting base of data sets affected by changing local authority resources, and local business re-prioritisation in the face of a very challenging economic situation.

The Project’s Objectives were to:

- Improve the World Heritage Site destination “product” and the visitor’s experience through improved visitor facilities and enhanced information, interpretation and orientation
- Implement the World Heritage Site Key and Area Centres to provide strategic World Heritage Site interpretation and orientation

This objective has categorically been met in terms of quality of product and improved experience. Over £1m has been spent on a range of visitor facilities and interpretation, improving the destination asset value of the World Heritage Site to an unprecedented level.

- Communicate the enhanced tourism offer to target markets

Despite choppy waters in terms of visitor...
Discover the Extraordinary

Project Evaluation

behaviour, data is indicating clearly that the improved and dynamic offer is being clearly communicated to a range of target markets. This has also taken advantage of the changing landscape of social media, with arguably some of the highest quality platforms for visitor engagement coming from the World Heritage Site. This is categorically clear in the 92% rating given to the Cornish Mining website by New Media Age; and by CNN’s picking up of the Site in 2012 and promoting it as One of the Top 27 Sites to visit in the world.

- Convert awareness into increased World Heritage Site landscape motivated visitors to Cornwall and west Devon

Awareness of the World Heritage Site landscape is complex and comprises understanding of world heritage per se, awareness of the mining landscape per se, and understanding of that landscape having international World Heritage Site status. The awareness and understanding is a fluid phenomenon, and influenced by multiple factors; however, day and overnight trips to the Cornwall and west Devon remain strong despite very significant spikes and falls in overall visitor numbers in response to the economic upheaval beginning in 2008. The data can show that the Cornish Mining sites across Cornwall and west Devon have shown impressive resilience to the economic disturbance, and in fact include some of the only attractions demonstrating uplift at these difficult times. Heartlands has seen visitor numbers in excess of 75,000 more than Tate St Ives over 2012-13, a percentage of 36% more than Tate St Ives own numbers.

- Encourage visitors to choose environmentally sustainable options

During the programme, a range of tourism businesses including attractions, accommodation, transport, guided tours and activities have been intensively encouraged to engage in sustainable tourism practices, in order to improve their own impact and to positive influence visitors to do likewise. The business engagement programme has ensured a long term alignment with sound heritage management practices and sustainable tourism, evident in the range of awards and certification secured by those business involved in the Heritage Champions programme.

Overall, the range of social, environmental and economic outputs and achievements, have been significant, and well-coordinated to ensure optimum impact, and overlap despite testing background circumstances. Businesses implementing simple pro-environment policies will reduce their environmental impact and also recoup costs quickly and simply. Similarly, local food production reduces environmental impact, increases economic benefit, and contributes to widespread community benefit. This is achieved by delivering wellbeing and purpose through local circular economy models, and favouring smaller businesses with greater connection to the farming environment than larger multinationals. Together, the three components knit together a more dynamic, resilient and collaborative mining heritage industry which meets the needs of visitors, businesses and communities alike.

For ease of reference the outputs had been split into the three broad categories below: economic, environmental and social. However, any one piece of the evidence base may offer insight into more than one outcome; this is reflected below, with multiple references to data included as appropriate.

1 UK DCMS survey Taking Part is a national survey run by DCMS which aims to find out how people spend their time in the leisure activities and facilities available to them. It also looks at understanding people’s lifestyle choices and what drives participation in the sectors that DCMS represents.
Cultural sector

The current national tourism data landscape is relatively flat or downward, with often unpredictable spikes and troughs. Emerging research notes that nationally, July 2013 saw an increase in activity in an otherwise negatively performing year\(^2\). The number of domestic overnight trips in England in July increased by 3% year-on-year, with nights and expenditure remaining flat. The increase in this month was likely the result of a heatwave in July of that year (the most notable since 2006), compared to a particularly rainy and cool July in 2012.

Overall, for the year to date, trips in England are down slightly (-2%), particularly business trips (-5%). While expenditure has remained consistent for this period (-1%), there is variation by the type of trip, with visits to friends and relatives increasing (10%) and holidays (-4%) and business (-5%) expenditure falling.

Despite the economy remaining at a low ebb, attitudes to this and to personal finances are the most positive they have been since the survey began. However 9 in 10 are still cutting back on household spending due to the economic downturn and falling disposable income, and this in turn has impacts on actual holiday bookings, and specifically secondary spend once arrived. Secondary spend has been hit at national and county level, with evidence appearing in data and anecdotes of reduced food and drink and outing expenditure. These changes have had significant impacts on tourism across the country, with no exceptions. These are circumstances which will hit attractions, particularly those charging an entrance fee.

However, there is good news from the data which indicates that the level and type of investment in the Cornish Mining sites, CMAMA attractions and wider landscape (such as the audio tours) has been timely. Segmentation analysis is suggesting that a number of types of visitor are expressing increasing interest in the range of experiences within the overall “heritage” offer, and are being influenced by high quality, well co-ordinated tourism products. The promotion tactics used by the World Heritage Site team are also well received by the media, with excellent response generated by local, national and international media as noted in the PR report (see appendices), and with increasingly receptive visitors.

The potential to build on the new investment delivered through the Discover the Extraordinary programme, is significant. Visits to museums and galleries in England at their highest levels ever; over half of all adults in England visited a museum or art gallery in the last year according to official statistics, published today in the Taking Part survey\(^3\). Similarly, the survey’s latest findings also reveal 78% of all adults in England had either attended or participated in the arts during this period. Our national heritage proved a firm favourite with 72% of adults visiting a heritage site in the previous year and more people, nearly a third of all adults, saying they now visited at least 3–4 times a year.

Even more positively, there is much headroom to move into in the South West. The North and East Midlands showed the biggest increase in arts engagement. Over 4 in 5 adults from the East Midlands said they had engaged with the arts in the last year. The corresponding rates in the North West and North East were 76.5% and 74.6% respectively. This suggests that the South West has even more growth to move into, using the platform of the increasing interest across the entire visitor economy to its best advantage. The Cornwall and West Devon World Heritage Site is perfectly placed to evidence the cultural weight that the mining landscape can bring to the sector offer, both in terms of its natural position in the wider arts and cultural offer as an expression of social and landscape change; and also in terms of its story’s many faceted articulation in the creative arts sector itself, from jewellery, to contemporary painting, poetry, music, drama and dance.

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2 VisitEngland GB Tourism Survey – July 2013
3 DEFRA Sept 2013
Maria Miller, Secretary of State for Culture, Media and Sport, noted that:

**THESE NEW FIGURES SHOW ONCE AGAIN JUST HOW IMPORTANT THE NATION’S ARTS AND CULTURE ARE TO PEOPLE. THEY INSPIRE, DELIGHT AND EXCITE US, HELPING EVERYONE – YOUNG AND OLD – TO UNDERSTAND THEIR PLACE IN THE WORLD.**

Other key findings from the Taking Part Survey 2013-14 Q1 include the points below, which also favour the South West in general, and the World Heritage Site across Cornwall and west Devon in particular, given the rural nature of the destination and its older demographic.

- The proportion of people visiting museums and galleries has significantly increased in all regions since the survey began in 2005-06.
- People living in rural areas had a higher participation rate in the arts than those from urban areas.
- Adults aged 65 and over have seen a significant increase in arts engagement over the course of the survey.

### Outdoor activity and landscape based sector

Similarly, landscape centred tourism is expanding and thriving. The economic value of walking, cycling and outdoor activity has continued to grow. Figures released in 2013 by the South West Coast Path team show that walkers using the route - England’s longest National Trail - spent around £388.6m in 2011, an increase of 10.4% on 2010 spending levels (£352.1m). The majority of this spend was attributable to staying visitors (£330.9m) and 15% (£57.7m) day visitors. This expenditure supports 8,985 full-time equivalent jobs – a 9.3% increase on 2010 estimates.

In addition, the research indicates that the total number of people visiting the Coast Path has risen from 6.07 million in 2010 to 6.2 million in 2011, accounting for 4% of all visitors to the South West. The 6.2 million visits do not include regular non-tourism visits such as local people taking their dog for a walk.

Says Mark Owen, the National Trail Officer for the South West Coast Path team: “These figures are great news. It shows that it’s not only the locals that know that to discover the most memorable views of our beautiful coastline you have to leave the car behind and explore on foot.”

Despite the impact of lower figures in 2012 as a result of one of the wettest summers on record, the general trend appears to be that while tourism in general may be suffering in the South West, visitors are increasingly looking to experience activities in the great outdoors.

It is clear that the investment in the wider industrial heritage landscape is an intelligent one in the face of increasing interest in all areas of landscape driven tourism, and in particular when that investment is configured to ensure optimum community benefit as part of a wider sustainable tourism imperative.

Crucially, the new investment is also bringing in new and non-traditional audiences. The report also notes that, Tate St Ives figures were as 203,000 for 2012/13, and Heartlands welcoming 278,000. The Cornish Mining World Heritage Site is now well poised to take full advantage of the increasing interest in a fresh, more compelling and much more inclusive offer of social, natural and built heritage across the full range of audiences.

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5 UK DCMS survey Taking Part is a national survey run by DCMS which aims to find out how people spend their time in the leisure activities and facilities available to them. It also looks at understanding people’s lifestyle choices and what drives participation in the sectors that DCMS represents.

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Axis one: clear economic success

1 Number of visitors whose main reason for staying the area was the attractor by 2013

The target was to see 2,900 more overnight trips in west Devon and 50,000 more nights in Cornwall over the period of the programme. Reporting on this outcome is determined by the data available at the time, which does not include final figures for 2013. It is important to note that tourism data is usually considered on a three-year rolling average, rather than a comparison basis required in this report. Baseline figures from 2010 are used unless stated otherwise, to include physical changes on the ground as well as promotional activity which started in earnest in 2011. The tables overleaf track the visits to and spend for the period immediately preceding the implementation of the promotional activity (2006 – 2010). These indicate that despite an unusually high spike in 2009, Cornwall’s tourism had experienced greater losses than the rest of the South West region and Devon.

However, the indications are clearly positive. Numbers of overnight stays in west Devon increased by 5,800 between 2009 and 2011. Across Cornwall, all areas saw an unusually high spike in 2009, which skews the figures somewhat; all figures fell after that. However, the period from 2010 to 2012 is a more reliable indicator of change for this outcome; this period saw a rise of 328,000 overnight stays in the county. Day visitors across both counties showed significant increases.

Results from Visit Cornwall and Visit Devon visitor research exercises conducted over the period of the programme confirm that the number of respondents who indicate that the historic mining landscape had influenced their decision to visit has increased from 9% of respondents in 2010, to between 14.5% and 19% in 2013, a significant and categoric increase.

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6 West Devon Survey – note that no later figures are available at this time.
7 Visit Cornwall 2012 Summary
8 Visit Cornwall Survey 2010
9 Arkenford Survey 2013
10 VC Joint SW Survey (Arkenford)

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Tavistock Audio Trail (Image: Bill Bradshaw)
Visitors to Devon and their duration of stay

![Chart showing the number of overnight and day trips to Devon from 2009 to 2011.]

Visitors to Cornwall and their duration of stay

![Chart showing the number of overnight and day trips to Cornwall from 2010 to 2012.]

Combined staying visitor spend 2006 - 2010

The chart below shows the change in the value of combined staying visitor spend in Cornwall and the comparison areas between 2006 and 2010, with 2006 being the base year. Actual figures are in the table at the foot of the page.

<table>
<thead>
<tr>
<th>Year</th>
<th>Cornwall</th>
<th>Devon</th>
<th>South West</th>
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Conclusion

These show that in the run up to the start of the project Cornwall had experienced a significant loss in tourism business compared to the rest of the South West region, and the rest of England and the UK. Devon was less affected.

1. The requirement was to demonstrate an increase in visitor numbers whose main reason for staying in Cornwall or west Devon was the Cornish Mining World Heritage Site. The figure in 2007 was 7%, and this was comparable to previous years\footnote{SW Visitor Survey 2008 Image: St Agnes Museum new entrance sign (B.Gamble)}. In times of unpredictable and significant change in visitor numbers, the engagement with the mining heritage offer is a better indicator of success than overall figures. However, a positive trajectory is described in both Cornwall and west Devon across both influence, and numbers. This in itself is a significant achievement in difficult economic times.

2. Whilst landscape and beaches will remain the principle attractor for Cornwall and west Devon, the influence of the mining landscape specifically has increased dramatically, suggesting that the main reason for visiting has indeed shifted to include the World Heritage Site experience. The data was obtained via results from the research exercises conducted by the Cornish Mining World Heritage Site team.
Visit Cornwall’s Visitor Survey 2010\textsuperscript{14}, published in 2011, indicate that of those asked, 9% stated that Cornwall’s historic mining landscape had influenced their decision to visit the county. By 2013, Arkenford data\textsuperscript{15} confirms that this increased to between 14.5% and 19%.

It is very important to note that the programme operated against three critical unexpected backdrops:

1. extreme recessionary impact across all sectors, within both the trade, and visitors
2. unpredictable and changing visitor behavior and numbers across the SW
3. massive fluctuations in weather 2009 – 2013. Poor weather has reduced numbers overall; sunshine in 2013 drew more visitors, but good weather tends to see visitors drawn to the beach rather than inland.

As an example, in 2010 Cornwall saw visitor spend reduce by 4% compared to the base year of 2006. Similarly, domestic trips in 2010 were 10% lower than in 2006\textsuperscript{6}. Combined staying visitor nights were 13% lower in 2013 than 2006; and combined visitor nights in 2010 were a very significant 18% lower than 2009. This type and range of fluctuation leads to significant reduction in spend; Cornwall lost £1m of spend in 2012 compared to 2011\textsuperscript{15}.

The economic impacts have also been felt in local authority circles. West Devon Borough Council has had to reduce all resource directed at data collection, specifically that of tourism. As a result, no data is available yet for 2012, or 2013.

- However, although the economic and climatic turbulence generates a complicated data picture, a range of findings indicate a clear upward trajectory of interest in, understanding of and influence by the World Heritage Site and its constituent parts, despite the long awaited sunshine this year, which has again influenced visitor behaviour. Overall, the trajectory is extremely positive: (Data from Arkenford unless otherwise stated; figures are rounded to nearest decimal point)
  - over 6% increase from 2011 to 2013 in interest in historical aspects, such as sites of historical interest, living history attractions and exploring historical ruins
  - 14% more visitors in 2013 than in 2011 thought mining heritage was a contributory factor to World Heritage Site status
  - 16% more visitors in 2013 than in 2011 thought industrial heritage was a contributory factor to World Heritage Site status
  - 4% more visitors in 2013 stated the World Heritage Site as an influencing factor than in 2011
  - Individual locations have seen a significant rise in interest; 7% more of visitors surveyed had visited Cotehele over this 2 year period.

The weather in 2013 is rather more important than might seem, as evidenced by visitor profile. Far fewer “Cosmopolitans"\textsuperscript{16} were evident in the survey in 2013, the group most likely to express an interest in heritage and historical experiences, and the largest segmentation group. Speculation might suggest that better weather this year may have attracted more traditional holiday makers with an interest in more traditional beach holidays and less in heritage activities. Similarly, the “staycation” affect has encouraged families to holiday closer to home, and choose a destination because of its proximity, rather than travelling to explore specific sites or seek specific experiences. This would, again, impact Cornwall’s ability to attract “Cosmopolitan” audiences. Despite these significant changes in the demographics of those surveyed, however, there is still a categoric and significant increase in influence of the World Heritage Site in choosing Cornwall.
Interestingly, despite historically low figures indicating any interest in “heritage”, in 2013 over 30% (32.4) said they had seen information about the World Heritage Site either before their holiday or during it. If a low number are looking for it, this suggests is has been well positioned to capture the attention of an audience whose interest was latent rather than explicit. Similarly, Arkenford data note that “mining heritage is a bigger contribution to World Heritage Site status in 2013 than in 2011”, with a greater number of people stating an intention to visit the AONB and World Heritage Site in 2013 than in 2011. **2011 to 2013 saw a clear upward shift in intention to visit industrial heritage attractions. Those who “definitely would not” fell from 19% to 16%; and those who would, or who would consider, increased by 4% from (81% to 85%).**

It can be difficult to extract categoric visitor behaviour data from surveys, but some trends are very clear. In terms of internet access, The Discover the Extraordinary programme has again built on an increasing interest in on-line data, a strategic investment at the time. Beaufort puts number of visitors securing information from the internet at 23% in 08/09; by 2012, that had risen to 49.8 and a figure of 52.3 by 2013.

**Clearly, an excellent web presence (scoring 92% by new Media Age) developed by the Discover the Extraordinary programme was timely, prescient and effective.**

In conclusion, the shift in impact and influence of the Cornwall and West Devon World Heritage Site is very significant. Notably, Cornwall Visitor Survey 2010 notes that “A good proportion of visitors to the county were visiting attractions/places of interest and taking part in activities such as walking and shopping whilst on their trip to Cornwall. Whilst a high level of visitors were aware of the Blue Flag scheme for beaches and Cornwall’s historic mining landscape the level of influence of each of these in either helping visitors to decide which beaches to visit or on their decision to visit Cornwall was relatively low. 9% of respondents indicated that Cornwall’s historic mining landscape had influenced their decision to visit the county.” The increase to 14.5 – 19% in 2013 describes a clear trajectory. **It is important to understand that this suggests strongly that not only has the Discover the Extraordinary programme contributed to increasing awareness of the World Heritage Site area’s connection to mining heritage, it has actually shifted the decision making process to such a degree that the number of respondents indicating its influence in their making a decision to visit the area has, according to some figures, doubled in size.**

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17 Arkenford, 2013
18 Visit Cornwall Visitor Survey 2013 (Beaufort Research)
19 Cornwall Visitor Survey 2010
Lessons learned and planning ahead

The period 2008 to current has been unpredictable, disrupted by extreme economic change and a series of extreme weather events, both having a clear impact on visitor numbers, visitor behaviours and visitor spend. It has also had an impact on the ability of local authorities to collect, and analyse data; some data collection is being reduced and incorporated into a wider exercise with less granularity, or phased out completely. Against that context, the rise in interest in heritage per se, the weakening of traditional presumptions about old and dusty “industrial heritage” and a clear trend of increased opportunity for wider heritage engagement (family time, outdoor experience, challenge to presumptions, exploration of new ideas, sensory delight (food and drink, arts and culture, first-hand experience of heritage activities such as underground exploration) have continued to engage and inspire. This is overwhelmingly contingent on the ability of the destination to communicate and engage, and dismantle narrow and inaccurate presumptions about what heritage might mean. The evidence from the World Heritage Site attractions, the website figures and the visitor numbers of the sites indicate a clear contribution towards healthy, thriving communities, enthused and engaged visitors, and a strong and resilient sense of place.

In 2008, 7% of visitors gave heritage as a reason for visit. By 2009, over a third of potential visitors expressed interest in heritage issues.

The interest is on the up. Direct growth may take longer to filter through; but in the meantime, the increase in interest, combined with a newly invested in offer across the World Heritage Site area, will insulate and make resilient the industry against further shocks. Heritage doesn’t get outdated. It just gets more valuable. Age is its USP.

Top three priorities for the future to build on current success

1. Ensure investment in strategic and financial resource is continued in communicating and engaging, to overcome presumptions and social barriers to the concepts of “heritage”

2. Continue collaboration to ensure that the offer is joined up, with each part of the wider and diverse World Heritage Site working to “pass on the golden baton” to ensure optimum exposure and “pull” factor

3. Ensure that data is carefully and appropriately collected, despite decreasing local authority and tourism destination budgets, to allow intelligent investment and resource management.

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20 SW Tourism 2008
21 VC Cornwall Trend Report, 2006 -2010

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As noted in the previous outcome, engagement with the World Heritage Site is on a positive trajectory, and able to build on the increasing engagement and interest in heritage and culture at a national level\(^{22}\). Recognition of product is more than simply recognising a label, but understanding what the product offers and deciding it carries a new level of interest for one as a visitor. The findings from Visit Cornwall and Visit Devon visitor research exercises conducted over the period of the programme, that the number of respondents who indicate that the historic mining landscape had influenced their decision to visit has increased from 9% of respondents in 2010, to 14.5-19% in 2013 is an indisputable indicator that the product is gaining recognition with all visitors.

1. Although the economic and climatic turbulence generates a complicated data picture, a range of findings indicate a clear upward trajectory of interest in, understanding of and influence by the World Heritage Site and its constituent parts. Engagement is increasing in multiple areas of understanding: (Data from Arkenford unless otherwise stated; figures are rounded to nearest decimal point)
   - 14% more visitors in 2013 than in 2011 thought mining heritage was a contributory factor to World Heritage Site status
   - 16% more visitors in 2013 than in 2011 thought industrial heritage was a contributory factor to World Heritage Site status

Furthermore, emerging data has suggested that this is a complex area, and has unearthed a considerable level of confusion and lack of understanding of the relationships between heritage, industry, World Heritage Site status, UNESCO and landscape. It has also spotlighted a baseline of a very high level of dismissal amongst visitors in terms of its likely interest value. For example, in 2010, 87% of Cornish visitors interviewed were aware of the county’s historic mining landscape, yet only 9% of respondents indicated that Cornwall’s historic mining landscape had influenced their decision to visit the county\(^{23}\), suggesting that 78% of those who already knew about it, did not consider it at all in their decision to visit the county.

As importantly, 35% of those asked across the SW in 2011\(^{24}\) indicated that World Heritage Site status would significantly add to appeal, yet only 25% said the same of UNESCO, despite them being synonymous. Similarly, although many people would consider that they knew about London heritage based attractions, there is very low level of awareness of their World Heritage Site status.\(^{25}\) Any tracking of recognition of World Heritage

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\(^{22}\) UK DCMS survey Taking Part is a national survey run by DCMS which aims to find out how people spend their time in the leisure activities and facilities available to them. It also looks at understanding people’s lifestyle choices and what drives participation in the sectors that DCMS represents.

\(^{23}\) VC CVS 2010

\(^{24}\) Arkenford SW Survey 2011

\(^{25}\) Cornish Mining World Heritage Site: Online research amongst potential market 2010 (Arkenford)
Site status therefore has to accommodate a wide range perceptions of the same thing. There is a high level of awareness of mining as a feature of the landscape, but very different level of awareness of its global importance, or its likelihood of offering enough interest to justify a visit. This is the shift that the DtE has effected. From 2011 to 2013, there was a shift from 72% (SW data)\(^{26}\) to 76.6% (SW data)\(^{27}\) of those who considered industrial heritage to be “my sort of thing” or to express “some interest”; furthermore, the group expressing “some interest” increased from 49% in 2011 to 58% in 2013, suggesting that the offer is increasing in appeal to new audiences and not those traditionally expressing an existing high interest in the offer. The issue here could be said to be one of latent demand – like cycle routes. They are only popular once people start to enjoy them; beforehand, they are simply unknown delights.

However, it can also be said that simple exposure to World Heritage Site information is also increasing. Whilst one survey carried out by World Heritage Site showed little change, data collected by the same agency for Visit Cornwall across the SW indicated a shift from 14% of visitors in 2011\(^{28}\) stating any recall of seeing World Heritage Site specific information to a total of 32% by 2013\(^{29}\). Notably, this included both during and before the visit, suggesting a successful penetration by the DtE team of online and digital sources, as a taster for the on the ground experience. The data backs this up: by far the most exposure had been seen on the internet, reflecting the investment in a high quality interactive website by the DtE team with video clips, downloadable brochures and interactive brochures and apps. A combination of slowly improving understanding, increasing recognition of brand, and a broader base of interest across the visitor base are all combining to ensure the World Heritage Site status across the two counties is able to generate a widely-felt resilient prosperity.

It is notable that although in 2011\(^{30}\) fewer people stated they had visited the Cornish Mining World Heritage Site offer than the Jurassic Coast World Heritage Site (19% as opposed to 24%) the total number who either had visited, or who had heard of and visited, either destination, was remarkably similar (65% as opposed to 66%). Furthermore, of those who said they had not heard, but would consider a visit, 24% considered the Jurassic Coast and 22% would consider the Cornish Mining World Heritage Site. All figures suggest an impressive awareness considering the very recent nature of the designation, and compare very well alongside a well known and very well established destination in the South West.
Top three priorities for the future to build on current success

a
World Heritage Site exposure, recognition and valuation as an offer is increasing. Furthermore, classification of any sort increases value of the offer. World Heritage Site status specifically registers with young audiences, those with a strong interest in history & heritage, the family market and “brand” orientated visitors. Cornwall has high numbers of all segments above, which represents a future opportunity to engage existing and likely future audiences in the heritage offer.

b
Those segments most interested in AONB status are the older audience, those with a strong interest in history and heritage, family and empty nest markets, “brand” orientated segments, and “independent” segments. This potential overlap between heritage motivated and landscape motivated visitors represents a potential opportunity to collaborate further with AONB land managers and marketers, in order to add value to the experience sought by AONB-motivated visitors by increasing their awareness of the closely related World Heritage Site status, and generate an increasingly joined up product.

c
When asked in 2010, 87% of visitors were aware of the country’s historic mining landscape. 54% stated they were aware that Cornwall has a World Heritage Site status because of its mining landscape. This high figure may have been a result of recent publicity regarding the recently acquired designation; nevertheless, it is an impressive figure. In the same survey, 69% of SW visitors stated they were aware of Stonehenge’s World Heritage Site status, which was the highest recognition factor of all asked. Cornwall is clearly already moving up rapidly in terms of awareness and engagement; this figure of 69% around Stonehenge presents a compelling and aspirational target for Cornwall and west Devon to set themselves, to continue to grow in awareness and to gain similar recognition to one of the most well known and loved heritage sites in the world. Additionally, some independent research was carried out by Dr Hilary Orange, on the public perceptions of industrial archaeology in a post-industrial society, which reported a high level of awareness of the World Heritage Site areas such as St Agnes (85.7% of the sample), Minions (76.6% of the sample) and Botallack (86.4% of the sample). These findings are further evidence of the strong awareness of the Cornish Mining World Heritage Site.


Heritage Champion
Business

26 Arkenford SW Survey 2011
27 Arkenford SW Survey 2013
28 VC Joint SW Summary of Arkenford SW Survey 2012
29 2013 Arkenford data VC June to October
30 Arkenford SW Survey 2011
31 Arkenford SW Survey 2011
32 VC Visitor Survey 2010
3 Reduction in impact of seasonality

Visitor numbers at 9 out of 11 attractions across the World Heritage Site indicate a categoric and steady reduction in seasonality of visitors to the Cornish Mining World Heritage Site by 31/12/2013, using as an indicator the percentage of August figures against the annual total.

The summer, spring and autumn peaks of activity will remain a characteristic of Cornwall as a visitor destination. However, an increase in the numbers of visitors outside those periods will bring additional direct economic resilience, plus indirect benefit in terms of secondary spend, and in word of mouth recommendation for the next season.

1. Face to face and online surveys with a range of large and small attractions within the CMAMA group indicate that the visitor numbers for August are showing a decline in importance in terms of a percentage of the overall visitor numbers, which themselves are on a steady rise. This indicates that other areas of the year are improving in terms of economic impact.

2. A range of factors has affected visitor numbers, both internal and some external. Some attractions are staffed by volunteers and can see this affect their ability to open; others have had developments or improvements on site which can affect numbers both positively and negatively. Likewise, external factors such as the prevailing economic climate, which can send visitors to free attractions and away from ticketed alternatives, and specifically unexpected weather changes, can have a direct and extreme effect on when visitors do or do not choose a visitor attraction.

3. Despite these factors, overall visitor numbers are showing, or expected to show (access to figures at any one time depends on when figures are collected and collated for analysis for the quarter) an overall increase, as well as a decrease in reliance in peak season numbers. This is a clear indication that the quality and diversity of the offer is providing a crucial resilience to the vagaries of visitor behaviour as a result of the issues noted in point 1 above.
Lessons learned and planning ahead

There is a limit to the actions that can be taken against the impact of global economic shifts and their influence on local behaviour. However, the investment in a quality product that is well marketed and intelligently co-ordinated, such as through the Discover the Extraordinary website, with its links to a range of heritage related activity such as cultural performance, literature new and historic, and thematic activities based on good audience intelligence, means that the product is much more widely accessible. This is true both in terms of simply increased awareness of the sites; and also in terms of increasing social and intellectual accessibility – ie increasing the numbers of people who would not have considered a visit previously. Successful engagement and persuasion of visitors that the site may hold interest and valuable experiences for them despite any previous preconceptions of “industrial heritage” and its lack of appeal for them is a key part of the development of the World Heritage Site success. This increased appeal has contributed to the increasing visitor numbers overall each year, and a longer viable season.

This extended season itself will then generate greater revenue, which in turn allows better investment, ensuring a positive cycle of high quality product available – and used - for a much longer season across the year.

Top three priorities for the future to build on current success

1. Ensure the overall progress in tackling the issues of seasonality during the programme is communicated amongst all businesses operating within the World Heritage Site, to build on the platform of success.

2. Ensure that support is targeted towards businesses who invest in clear and operational visitor tracking systems, regardless of how well resourced the business may be, to enable broad, comparable and authoritative analysis.

3. Continue to develop excellent links with related sectors, such as arts, culture, food, activity and accommodation, to build a year round, multi-thematic and resilient heritage offer with a diversity of possible audiences.
The understanding of heritage, landscape, World Heritage Site status, industry, and UNESCO designation is, as noted above, a complex area. However, the number of people considering visiting the range of options within the industrial heritage site is clearly increasing. Given the dip in overall numbers, the expected increase in visitor numbers by heritage attractions, and the actual healthy economic growth in visitor spend identified by heritage related businesses as noted elsewhere, the conclusion can safely be drawn that more than traditional heritage seekers have been attracted by the new investment in the heritage offer.

The background to this outcome is the evidence base noted in the Taking Part survey, referenced already. This data notes that visits to museums and galleries in England at highest levels ever; over half of all adults in England visited a museum or art gallery in the last year according to official statistics, published today in the Taking Part survey. Similarly, the survey’s latest findings also reveal 78% of all adults in England had either attended or participated in the Arts during this period. Our national heritage proved a firm favourite with 72% of adults visiting a heritage site in the previous year and more people, nearly a third of all adults, saying they now visited at least 3-4 times a year.

A similar trajectory can be tracked from regional data. From 2011 to 2013, there was a shift from 72% (SW data) to 76.6% (SW data) of those who considered industrial heritage to be “my sort of thing” or to express “some interest”; furthermore, the group expressing “some interest” increased from 49% in 2011 to 58% in 2013, suggesting that the offer is increasing in appeal to new audiences and not those traditionally expressing an existing high interest in the offer.

Overall visitor numbers at the CMAMA attractions increased by at least 9,500 by the end of 2013, based on only partial data as a number of attractions had not yet compiled their data. Based on the emerging data suggesting that overall interest is increasing, with a regional increase of 9% expressing new interest in industrial heritage, a fair conclusion to make would be that a substantial number of “new” visitors were engaging with the heritage offer by 2013. If the regional 9% of new interest were extrapolated to the Cornish visitor numbers of 2012, it would equate to 393,660 new visitors expressing some interest in industrial heritage. It would be fair to expect that the target number of 4,000 new visitors to CMAMA attractions has been met.
Lessons learned and planning ahead

Overall visitor numbers, visitor spend, visitor recognition and visitor interest is increasing. This leads to a reasonable conclusion that an increase of 4,000 non-traditional visitors has been successfully met and exceeded.

As an example, the World Heritage Site funded ‘Tin’, a drama performed at CMAMA attractions, with an audience of over 6,000 who may well not have otherwise engaged with the heritage offer.

Further data would be been useful had the resource been available on the ground at all attractions.

Top three priorities for the future to build on current success

1. Better data collection at small attractions in particular will help them to plan for the future. This will involve specific business support, as reliance on voluntary staff can mean a more adhoc approach to data collection. CMAMA is now very well placed to lead a project to develop a data collection capacity building programme across member attractions, to build on the legacy of lessons learned over the DfE project.

2. Further resource directed at the most progressive attractions would also allow them to capture qualitative data such as motivations and wider understandings of the heritage offer, which in turn would inform and benefit the activities of the sector as whole.

3. Future programmes will focus on developing support for World Heritage Site cultural events, which have proven to be a major factor in growing and broadening new audiences.
A sample of 6 attractions across the site was initially identified as most likely to sustain and develop new working hours during the period of the programme, to a total of 7.5 FTE posts. Although the distribution of these posts has developed differently to original expectations, the overall number of additional FTE posts created, has increased to 10.5 FTE.

1 Initial expectations suggested jobs increase in a range of attractions across the World Heritage Site, acknowledging that a range of developments would impact on this within each business, including income and funding from a range of activities. Overall, the objective was to show an uplift in jobs generated as an indicator of overall growth of the sector.

2 The total of new part time, full time and casual jobs amongst the sample is in fact 24. This includes receptionists, bar and café staff, marketing officers, development officers, outreach and educations officers, and outdoor instructors. Based on the figures noted elsewhere showing visitor numbers and visitor spend, these posts are expected to expand and increase.

3 Note that these figures do not include accommodation, food and drink and tour operator jobs generated as a result of increased numbers and investment. Again, increased spend noted by accommodation and tour operators can also generate an increase in job growth, not counted in this output.

Lessons learned and planning ahead

Many developments arise and changes occur during the period of a three year programme, and flexibility is required to capture the full benefit which the original target may not have foreseen. Job growth can occur more widely in secondary and tertiary supplier circles, and other data collected suggests that this is highly likely given the growth and expansion seen in related accommodation and tour operator sectors. Future programmes may wish to project targets for this and capture data accordingly to understand the full range of benefits.

Top three priorities for the future to build on current success

1 As the heritage offer increases and diversifies successfully, other factors can be used to measure visitor interest and engagement with the offer, such as booking accommodation on the basis of proximity to the heritage landscape. Data collected in the future will look to accommodate this to show the full impact of jobs being created and sustained.

2 The heritage experience is fundamentally about story; an opportunity exists to work with heritage-related employees to capture their pride in their work to promote and explain the heritage landscape and built environment, as a further indicator of the value of jobs created.

3 Further data remains to be captured in the wider and related sectors of creative arts, food and drink and a range of outdoor activities to capture the full value of a thriving heritage sector.
Underground at Geevor Tin Mine

OUR NUMBERS ARE INCREASING EVERY YEAR, AND ALTHOUGH WE ARE A SEASONAL PROVIDER BY OUR NATURE, WE FULLY EXPECT TO BE ABLE TO INCREASE HOURS WORKED BY OUR STAFF AS WE GROW TO MEET DEMAND.

Heritage Champion Business
A sample survey of 20 inland businesses across Cornwall and west Devon that had participated in the project was carried out by telephone in the autumn/winter of 2013 to ascertain any change in visitor spend over the three year period. The businesses included large attractions, activity providers, food and drink provision and accommodation providers. Based on data from those who gave actual spend figures, the actual increase was 20.12%. The average percentage increase in spend, based on all those businesses, including start-ups, who responded, is 138%.

The range of businesses expressing growth matched the range in types of growth, indicating the uplift has been felt across all areas of all sectors ie accommodation provision, activity provision, food and drink provision and gate numbers. These two average increases also included decreases in three of the sites, two of which noted that the decrease in 2013 was based on unusual baseline figures in 2009, which had been a “bumper year” for them, driven by specific activity such as the opening of a new café. Seventeen indicated strong growth, with a range of 15% to 1000% uplift. Overall, the increase is robust and widespread. Businesses have been able to expand in a range of areas; examples include being able to increase heritage tour delivery by 100%; investment in entire new accommodation construction; and development of new tea rooms and cafes.

As noted above, the period of the programme has been one of extreme economic and climatic change. The absolute increase in average spend in those businesses not reliant on the coastline for their viability can therefore be seen in an extremely positive light in terms of its association with the World Heritage Site promotion, engagement and attraction of new audiences. Obviously a range of variables are at work to generate these figures; but there is a clear increase in average spend in businesses engaging with the WHS product and marketing.

Increased visitor spend by 10% in Cornwall and west Devon, especially in the inland areas of the World Heritage Site

AVERAGE ACTUAL INCREASE IN VISITOR SPEND OF 20% AMONGST A SAMPLE OF 20 INLAND HERITAGE RELATED BUSINESSES

AVERAGE PERCENTAGE INCREASE IN VISITOR SPEND/INCOME OF 138% AMONGST A SAMPLE OF 20 INLAND HERITAGE RELATED BUSINESSES

Gwennap Pit (Image: Barry Gamble)
Lessons learned and looking ahead

The heritage based businesses, whether accommodation, attraction, food and drink or activity based, have been affected by the overall downturn, together with the non-heritage based sectors. The upturn in weather does not even herald promise in the same way, as sunshine is what attracts visitors away from experiences not associated with the beach, such as visiting attractions and in particular secondary spend such as in gift shops and food and drink. However, all indications are that the DtE investment has not only shielded the heritage based sector from the wider downturn, but has in fact enabled the sector to grow and expand on the back of a newly high quality offer, and take advantage of the increasingly receptive response to heritage and cultural historical experiences. The improvement in quality has built in an appetite within the visitor base; research by Beaufort in 2012 noted that 19% of visitors expected to be spending more on attractions than in previous visits, compared to 9% that would spend less. This appears to have been an opportunity grasped by both hands by the DtE investment.

The business profile in Cornwall and Devon is one of small, entrepreneurial businesses, usually at the micro end (ie fewer than 10 employees) of the SME scale. The benefit felt by the 20 sampled businesses is a good indicator that this investment benefits precisely that sort of businesses, encouraging agility, networking, collaboration and clustering. This presents a well grounded basis for further investment in future bids to ensure that the opportunities developed by the programme are well used, and provide a critical leg-up to that vibrant entrepreneurial spirit.

Without this investment it is possible Cornwall and west Devon would have missed a trick, and the “industrial heritage” component of the holiday to the area would have remained in a dusty, and inaccessible, corner for a small minority, compounding the difficult times experienced by the visitor economy as a whole.

Top three priorities for the future to build on current success

a. Build on relationships established during the programme to enable all participating businesses and attractions to draw up, and adhere to, standard and shared data collection to expedite later comparison and analysis.

b. Continue collaboration to ensure that the offer is joined up, with each part of the wider and diverse World Heritage Site working to “pass on the golden baton” to ensure optimum exposure and “pull” factor.

c. Encourage inter-member use of data throughout the period of the programme to encourage increased collaboration on new initiatives.

2009 was only our second year in business and business increased because of better marketing and word of mouth recommendations.

Heritage Champion Business

WE HAVE NOT DONE MUCH SPECIFIC HERITAGE MARKETING OURSELVES EITHER SO [OUR 15% INCREASE] MUST BE AS A RESULT OF THE ACTIVITY RELATED TO WORLD HERITAGE SITE AND OTHERS PUSHING… WE KNOW OF NUMEROUS [Mentions IN ] ARTICLES IN SOME OF THE GLOSSIES OVER THE LAST 12-18 MONTHS, FOR EXAMPLE.

Heritage Champion Business

PERCENTAGE UPLIFT IN VISITOR SPEND AMONGST SAMPLE OF HERITAGE RELATED BUSINESSES RANGES FROM 11% TO 1000%

OUR TOUR GUIDE ACTIVITY IS UP BY OVER 100%

Heritage Champion Business

37 Visit Cornwall Visitor Survey 2012 (Beaufort Research)
38 DtE programme has enabled the development of a further funding bid to the Arts Council for England to develop a cross sector collaborative programme including this item.
39 See previous footnote.
40 See previous footnote.
Axis two: contagious environmental success

1 Promotion of 50 local food products in relevant Cornish Mining World Heritage Site visitor information and interpretation; increase by 15% of the percentage of food that is locally produced which is used in cafes of the CMAMA gated attractions.

All heritage businesses were actively encouraged to map, and increase, the number of local food products sold and promoted at all available outlets during the life of the programme, with a view to establishing a new local food and drink provision culture. Local food is now a high profile, high quality component of the Cornwall and West Devon World Heritage Site. By the end of 2013, all CMAMA attractions providing food and drink were offering local options; two attractions were promoting 30 new local food and drink products just between them, and one large attraction reporting an increase of 150% of local food and drink suppliers from a baseline of only six in 2009.

Data was collected throughout the Project by the Project team on the number of local food products promoted in relevant Cornish Mining World Heritage Site visitor information and interpretation. Specific support was given to the food component of the heritage experience, with great success. Overall, attractions, food providers and the World Heritage Site team marketing activities promoted over fifty actual companies selling a range of different food and drink items from across the Cornwall and west Devon area.

Local food and drink links to local heritage is now so well established that three of the attractions which were either not operating or selling no food and drink in 2009, are selling a total of 30 local food and drink products from a base of zero at the beginning of the funding period. A further large attraction increased its provision by 150% from a baseline of six local suppliers.

Food and drink items included tea, coffee, beer, fruit juice, fudge, biscuits, cakes, ice cream, clotted cream, crisps, meat, sausages, fish, eggs, chocolate, pasties, vegetables, fruit, baked goods, preserves, herbs, bottled water, milk,
and cream and a range of prepared goods using a wide range of fresh local ingredients.

Promotion of local food and drink was also highlighted and discussed in the business engagement programme, both as a means of telling the story of the mining communities, but also as a means of enabling visitors to contribute to the local economy surrounding the heritage experience. Over 50 Heritage Champions within the tour operator, accommodation and food and drink sectors were actively encouraged to use local food in their own businesses to promote and support the mining heritage offer.

Further success was seen in the development of a food and drink specific visitor gifting programme, combining the two outcomes of increased exposure to the heritage offer, and generating income for the conservation of the site itself. The Cornish Crisp Company were engaged to develop a “heritage flavour crisp”, sales of which now generate a percentage per unit which is passed directly to the World Heritage Site Team for investment in the heritage offer.

An entire Cornish Mining Heritage Hamper was developed to promote the products and the site, 10 per cent of sales of which is also being invested in the Visitor Gifting scheme, as well as a percentage of each product sold.

Sue Wolstenholme, MD of The Cornish Crisp Company, said: “We’re very proud to be launching a crisp in partnership with an organisation which celebrates our important mining heritage. Linking up with local charities and organisations and finding ways to help each other is how we like to work.”

**Top three priorities for the future to build on current success**

**a** Specific support within the business engagement programme has incited enthusiasm between food providers, activity providers, accommodation providers and attractions, and has generated much support for ongoing collaboration and networking to promote a coherent offer to visitors.

**b** Concern about future funding streams is high in many statutory sector priorities at the moment; the success of the visitor gifting scheme and other alternative income streams is now encouraging further research and activity into the potential for working collaboratively with the private sector to generate income streams for continued conservation, preservation and development of the heritage site and its diverse visitor offer. Visit Cornwall’s own research in 2012 indicates that over a third of visitors would be interested in a “visitor loyalty” scheme where income generated goes to investing in the natural environment and help community based learning initiatives; and even more interesting, the greatest interest was found in the 25-34 age group, of whom almost 50% indicated an interest. The potential to develop such schemes in clearly significant.

**c** The first steps taken by the DtE programme have indicated the potential to join up business and strategic management agencies to mutual benefit. An overall objective of “Resilient Places” could harness and galvanise even greater joined up activity at micro and macro level to ensure investment is attracted to, and remains in, those destinations.

“I KNEW THE WORLD HERITAGE SITE EXISTED, BUT I WASN’T SURE WHAT IT MEANT, OR HOW IT CONNECTED WITH US LOCALS...NOW I UNDERSTAND IT’S ACTUALLY ABOUT FOOD AND LAND AND CULTURAL HERITAGE - AND HOW EVERYTHING IS UNEXPECTEDLY AND NECESSARILY CONNECTED!”

Heritage Champion
Business and Resident

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41 Image opposite: Cornish Heritage Hamper with Cllr German, Kelly Fylnn (Simply Cornish Hampers) and S Rowe (World Heritage Site Team) (Image: Toby Lowe)

42 Beaufort Cornwall Visitor Survey 2012
2 Increase recycling by 10% and reduce water consumption by 10% at all CMAMA gated attractions

Partial data has been extracted from the CMAMA attractions to establish resource use and management over the three year period, and although not complete, there are indications that increasing numbers of businesses are engaging with the resource management agenda successfully. Specific data was not collected successfully by all attractions (see Lessons Learned below) but of the ten attractions who responded, eight are implementing recycling and/or water management programmes which were not in operation at the beginning of the programme and are also engaging in a range of other related activities to manage their resource use and carbon impact.

Data was collected from a range of attractions on specifically water and recycling activity, and almost all reported an increase in activity in management, and in resource efficiency. One CMAMA member has reported a reduction in energy consumption from 153,320 KWh in 2009 to 94,550 KWh in 2012, a drop of over 40%, which is highly significant in a large attraction both in terms of logistical achievement, and in terms of financial and carbon saving.

Lessons learned and planning head

Difficulties were encountered in data collection specifically in relation to baseline environmental data. The three year programme improved the collaborative relationships between the range of attractions and the statutory bodies tasked with working with them to such a degree that although still problematic, areas such as resource efficiency management and utility bills sharing is now becoming more acceptable, and will be inevitably easier in further joint initiatives.

Furthermore, excellent activity is evident in a small number of attractions, who have a very strategic and holistic approach to resource and environmentally management and with a clear understanding of the social, economic and environmental benefits therein. This is repeated across all sectors; the trick is always to encourage the best to encourage the rest.
Number of tourism businesses achieving Quality Standard accreditation eg. GTBS

The range of tourism businesses and the awards, certifications and merits they have achieved over the last three years is wide and impressive. However, interest in and ability to afford certifications decreased, reducing the number of businesses overall which applied to GTBS (Green Tourism Business Scheme). Nevertheless, amongst the CMAMA attractions and the Heritage Champions, 13 awards for excellence were secured in 2013 alone for a wide range of achievements, from quality of food offer to overall sustainability. Furthermore, six Heritage Champions and one CMAMA attraction are now GTBS certified to silver or gold level.

1. 2009, Cornwall had the highest number of GTBS certified tourism businesses in the UK, with the highest percentage of silver and gold awards amongst them, following an intensive three year programme to support businesses through this certification. By 2010, a plateau had been reached with possible saturation level exacerbated by increasing anxiety around extra costs of such schemes, following the economic crunch of 2008/9.

2. However, increasing alignment between sustainable practice and good quality has seen both areas integrated into almost all awards available to tourism business, from every sub-sector, ensuring that good business practice is celebrated equally with sustainable business practice.

Top three priorities for the future to build on current success

a. Data collection difficulties have countered efforts at times. Future programmes will build on the existing relationships and develop capacity and understanding around the need for detailed, accurate and reliable data collection on environmental management by targeting support towards those businesses receptive to improving skills in this area.

b. The range of related activities and efforts to manage social and environmental impact is impressive, and there now exists an opportunity to work with the programme stakeholders, to engage with each attraction on issues which it has identified during the programme to take its environmental performance further.

c. There is a clear opportunity to develop mentoring schemes to enable the very best operators in resource management to share that expertise and encourage those who need support from their peer to move forwards with confidence. There are several clear contenders for such a role within the CMAMA grouping who could support the wider group onto a new footing, with support from officers and related organisations. This is now being considered and integrated into future funding and trade support activity. For examples, please see the following section. One attraction in particular has exceeded expectations in all areas of environmental management; this could become the standard for all attractions and further support will encourage all attractions to move in this direction.

21 AWARDS AND COMMENDATIONS FOR EXCELLENCE WERE WON AT LOCAL, REGIONAL AND NATIONAL LEVEL BY CMAMA ATTRACTIONS AND HERITAGE CHAMPIONS IN 2013 ALONE
The range of commendations, awards and quality certifications secured by the CMAMA attractions has developed over the three year period, and to date include: Green Tourism Business Scheme; membership of Cornwall Association of Tourist Attractions; Queens Award for Enterprise in the Sustainable Development; a range of awards in the Cornwall Sustainability Awards 2013; Investors in People status; Green Apple Award; and numerous building awards including from RIBA (Royal Institute of British Architects); Sustainable Construction for Retrofit; Sustainable Construction for New Build Domestic; Sandford Award; National Science and Engineering Week Best Engineering Event; Quality Badge awarded by Cornwall Council For Learning Outside The Classroom, and others.

Awards and certifications for tourism excellence have also been picked up at local, regional and national tourism level by the CMAMA attractions and Heritage Champions. The range of businesses involved in promoting World Heritage Site visitor offer is reflected in the range of awards received for excellence in the recent Visit Cornwall Awards. Thirteen of the prizes at the Visit Cornwall awards in 2013 alone were picked up by CMAMA attractions and Heritage Champions, with those awardees going on to win a further eight awards and commendations at regional, and national level. The prizes won by CMAMA and Heritage Champions so far just this year include:

**Cornwall Tourism Awards**

**Bronze**
- Visit Cornwall Art, Museum and Maritime Attraction
- Visit Cornwall Wildlife Friendly Business Award
- Visit Cornwall Sustainable Tourism Award

**Silver**
- Visit Cornwall Best Historic and Heritage Property Country House
- Visit Cornwall Café and Tea Room of the Year
- Visit Cornwall Self Catering Establishment of the Year
- Visit Cornwall Family Fun day Out Award
- Visit Cornwall Sustainable Tourism Award

**Gold**
- Visit Cornwall Best Tourism Information Service
- Visit Cornwall Art, Museum and Maritime Attraction
- Visit Cornwall Sustainable Tourism Award

**Winner**
- Visit Cornwall Winner of Winners

**Finalists**
- SW Best Historic and Heritage Property Country House
- SW Sustainable Tourism Award
- SW Small Visitor Attraction

**Highly Commended**
- South West Best Tourism Information Service
- SW Self Catering Establishment of the Year
- UK Self Catering Establishment of the Year
- Cornwall Today (Best Heritage Attraction)
- South West England (Tourism Excellence Awards)
The range of specifically pro-environmental and pro-social activities being undertaken by CMAMA attractions alone (ie not including all fifty Heritage Champions) since 2009 have increased across all areas, and include:

**Transport**

SINCE 2009: annually revised travel plan; use of website to encourage of visitors to come by public transport; establishment of car sharing schemes; horse tie up area to enable horse riders to visit sites whilst on the clay trails.

**Energy**

SINCE 2009: Investment in biomass boiler; wind turbines; solar panels; more efficient boiler systems; LED lighting; research into photovoltaic systems.

**Water**

SINCE 2009: investment in more efficient toilet facilities; new schemes for use of recycled rainwater for all toilets; delivery of staff training to improve efficiency of water usage; use of devices in the toilet cisterns to reduce water consumption and fitting of water saving devices to the urinals in the main toilets.

**Waste**

SINCE 2009: new recycling systems for visitors and staff; development of environmental policies; visitor guidebook designed locally and printed on 100% FSC recycled paper using vegetable inks and card containing kaolin sourced in Cornwall; site promotional leaflets printed on FSC paper from sustainable sources and the quantity of leaflets reduced from 150,000 to 120,000; recycling old waste cooking oil.

**Purchasing**

SINCE 2009: increased local purchasing for café and food outlets; work with local artisans to eg build bird feeding stations; adoption of sustainable procurement policy; local procurement increasing range since 2009 to include services (eg graphics and design); food, drink, art, pottery, jewellery, printed gift cards books, paintings, CDs, ceramics, and a range of handmade gifts.

**Staff engagement**

SINCE 2009: weekly meetings to share information on environmental progress; green charter delivered as part of induction; staff training eg Eden Green Foundation Course; email updates on environmental activities.

**Community impact**

SINCE 2009: liaison with pre-schools and primary schools to develop insect gardens and bird feeding stations; development of bird and insect surveys onsite for local community; development of free scavenger hunts through the trails; provision of free family activities to engage younger children in the landscape; Open Days and Free Days for local communities; regular communication via local press; increase in number of volunteers in some sites of around 400%; increased range of community events eg Christmas food and craft fairs.
paranormal evenings, clay play days, pit to port tours, garden opera performance and local heritage weekend (working with local museums).

**Local habitat**

SINCE 2009: development of bird and insect friendly gardens; development of new Environmental Trails; staff input into improvement of local surrounding habitat; habitat surveys implemented.

**Lessons learned and looking ahead**

The key lessons of the previous outcome (data collection) pertain to this also. There is clearly a wide range of pro-environmental and pro-social activity being undertaken by heritage based businesses, both in terms of accommodation, activity, food and drink and attractions. However, if fees for formalised certification schemes such as GTBS or others become out of reach in times where spending is very carefully prioritised, efforts need to be made to ensure capture and valuation of all the activities being undertaken in a less formal and structured way.

**Top three priorities for the future to build on current success**

a. Clear success and emerging enthusiasm for green activities will be built on to build a simple means of capturing the impact of such activities, particularly if they are not being implemented as part of a formal scheme which would have its own data collection tools available for use.

b. Qualitative mechanisms will be considered to understand why some businesses engage more than others, as well as quantitative measurements of what they have done.

c. Outstanding success of the early adopters will be used more effectively in the future to encourage others, to share expertise, and to collaborate on skills which develop quality and good environmental management.
3 Carbon footprint reduction of at least 10%

The target was to demonstrate that we have encouraged visitors to make sustainable options and we must show a reduction of 10% of the average carbon footprint. The increase of visitor footfall in difficult economic times for businesses has been a priority which superseded reduction in overall carbon management, a phenomenon seen in an increasing difficulty in engaging businesses across all sectors in carbon management since 2009. Cuts to tourism activity in both counties also curtailed full data collection and analysis, from carbon to broad tourism data. However, activity was undertaken during the programme to highlight routes to success, and simple ways to encourage more sustainable visitor behaviour in relation to active persuasion. Engagement with visitors is crucial if significant behaviour change is to take hold and long term habits are to be shifted. The outcome uses a proxy of behaviour by businesses to suggest increased encouragement of sustainable options by visitors.

1 Over fifty different local food products were being offered and promoted across the World Heritage Site area by December 2013, offering a potentially dramatic difference in carbon impact. As an example, a locally sourced Sunday lunch can be responsible for an average 0.168kg of carbon, as opposed to an average of 3.13kg of carbon for ingredients bought from standard supermarket sources (eg New Zealand lamb, green beans from Kenya etc).

2 In 2013 alone, at least six awards were gained by CMAMA and Heritage Champion businesses specifically for environmental and local food and drink excellence, demanding a high calibre of operation in terms of local purchasing and promotion.

3 Data collected in 2011 and 2013 suggested that response to greater promotion, and greater investment in infrastructure, was having an impact in visitor attitudes. Increases of between 0.5 to 5.9% difference were seen across the board in the likelihood of exploring an area by foot, exploring an area on bicycle, exploring an area using public transport and using walking trails increased. Likewise, the likelihood of exploring the area by car reduced by 1% over the same period. In 2010, 22% would not consider taking a car free day out; in 2011, a total of 85% would or would have interest in exploring an area by foot, with only 15% indicating they would not consider this; and by 2013, a total of 91% stated they would or would have an interest in exploring an area by foot, with only 8% indicating they would not consider this. As a proxy for visitor behaviour shift, this suggests a clear and strong trend towards outdoor based and low carbon activities, a change seen in the entire visitor industry from local food to spa experiences to green accommodation choice.

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43 Arkenford Visitor Surveys 2011/2013
44 Visit Cornwall CVS 2010
45 Arkenford Visitor Survey 2011
46 Arkenford Visitor Survey 2013
Learning from environmental engagement programmes in Cornwall, and elsewhere, has indicated that importance of early adopters and “ambassadorial” models, as noted in the heritage champion programme used very effectively during the period as part of the business engagement programme. As such, three Heritage Champion businesses were handheld to use a carbon management tool as part of their own operations to assess, and manage their carbon. The tool was a new tool developed by a partnership between BT, Superfast Cornwall, the Clear About Carbon Programme and CoaST/DtE to enable businesses to engage simply with the carbon agenda, and was well received. Tourism businesses through the DtE programme engaged with the tool dramatically more than through BT’s own website, logging over 3000 hits through CoaST, many more than through BT. Although challenging, the Champions handheld through the process despite poor weather dips impacting on energy use, have logged a reduction of up to 80% in carbon tonnage due to heating from August 2010 to August 2013. Although affected by multiple variables, including weather, interruptions to data inputting, and incomplete data sets, one of the Champions brought their monthly carbon tonnage down from 2.13 to 1.37 between 2010 to 2013.
Lessons learned and looking ahead

Carbon management is clearly increasingly critical as a business tool, and an economic and environmental management tool. The challenge lies with engaging businesses, destination managers and other stakeholders to take it seriously, at a time of competing demands on time and resource.

However, despite testing circumstances, excellent partnership was established amongst key players to develop a user friendly carbon management tool for tourism businesses, which will remain viable and relevant as a legacy tool.

Equally, ongoing partnerships with CoaST, SW Tourism, Visit Cornwall and Cornwall Council allowed access to the REAP Tourism model for destination management level assessment. Pending decisions on future data collection resource levels, the REAP Tourism model could enable the development of a carbon baseline for all future activity. Furthermore, specific intensive hand holding of a sample group of Champion businesses has allowed both a capturing of data, and a longer term assessment of carbon change, as well as long term learning and engagement on carbon management.

The DtE programme has essentially been a capital investment programme, to raise an existing base of poor quality to good, and even excellent. Carbon reductions in such an environment are challenging, particularly when strategic cuts to environmental management staff in statutory bodies are widespread. Equally, significant fluctuations in visitor numbers as a result of weather and economic dips and surges have disrupted the expected trajectory. However, careful and determined partnership work has ensured high quality business engagement to deliver carbon management learning as a long term legacy output, as well as indicative shorter term carbon results from a sample grouping of businesses indicating future areas of activity and improvement.

Top two priorities for the future to build on current success

Indications from visitor survey work in 2011\(^{47}\) have highlighted that over half – 55% - of visitors would be interested in dedicated public transport services between different World Heritage Site areas. Whilst this remains extremely challenging in the current economic climate, which is seeing public transport infrastructure drastically curtailed, there clearly exist opportunities for innovation and entrepreneurship within the third and private sectors to develop high quality and low impact transport services. Discounts based on use of public transport also appeal to around the same percentage – approximately half – of visitors asked. This is a significant finding, and is being communicated to CMAMA attractions and related businesses to enable them to consider new partnerships which would both enhance the visitor experience, and reduce carbon significantly.

Approximately a third of visitors in 2010\(^{48}\) stated that they would use more public transport if it were well advertised. However, by 2011, up to 56% stated they would be more likely to use public transport options between heritage sites locally, if they were well advertised beforehand; and if they were well advertised at the destinations in question. This provides a clear and obvious incentive for simply offering more information online, and at entrance of attractions, of existing public transport infrastructure, to take proper advantage of this shift in visitor attitudes, which could in future lead to significant carbon reductions.

WE’VE STARTED FAIRLY LATE, BUT SO FAR THE VALUE OF DOING IT HAS BEEN TO SEE PATTERNS IN ENERGY USE THAT COULD BE IMPROVED; HOW CAN WE REDUCE OUR CONSUMPTION WHEN THE WOODBURNING STOVE IS NOT FIRED UP? WHAT MEASURES CAN WE MAKE TO IMPROVE HEAT LOSS IN THE CARRIAGES? HOW CAN WE ENCOURAGE GUESTS TO MINIMISE WASHING?

WE’VE YET TO IMPLEMENT ANY MAJOR CHANGES, BUT ARE LOOKING INTO A BIOMASS SYSTEM THAT WOULD IMPROVE OUR ENERGY USE. FRUSTRATINGLY THIS SCHEME THAT WOULD CONSIDERABLY REDUCE OUR CARBON USE COMES WITH A HEFTY START UP PRICE, BUT THAT IS ALWAYS THE BALANCE.

Heritage and Carbon Champion

47 Arkenford Visitor Survey 2011
48 Visit Cornwall CVS 2010
5 Development of Devon as a green destination

The programme ensured that investment in Devon contributed to its development as “England’s greenest county”. This was achieved by supporting investment at the Tamar Trails Centre & Tavistock Museum to ensure the development of interpretation which encourages on-foot exploration.

1 Three key components are required to encourage behaviour change such as an increase in on foot-exploration. These comprise infrastructure development; interpretation and information; and community engagement. The RDPE programme supported investment in Tamar Trails Centre and Tavistock Museum across all three areas.

2 Physical investment included trails across large areas of previously inaccessible land. Until recently, much of the 25km which make up the new Tamar Trails have been out of bounds to the public, but thanks to the Tamar Valley Mining Heritage Project, part funded by the DtE project, cyclists, walkers and riders can now enjoy the old transport network of tramways and railways, leats and canals, and explore historic mining sites set in this outstanding natural landscape. Trails have been created utilising and revitalising existing transport routes wherever possible. Much of the land is still privately owned but negotiation with landowners has enabled public rights of way to be leased, joining up a continuous network of trails. There are a choice of routes that vary in length, and terrain. Many incorporate dramatic vistas across the River Tamar to Gunnislake and Kit Hill, whilst others take in the breathtaking solitude of Morwell Rocks or the secretive Rubbytown Valley where JMW Turner made his preliminary sketches in 1813 for his celebrated painting “Crossing the Brook”. There are also some tougher walking routes in some of the more inaccessible areas with very high levels of archaeology. Additionally, the work has enabled the historic mining landscape to be made safe and ensure that the historic environment and wildlife habitats conserved.

3 Interpretation both at the Tamar Trails Site and across the routes provide a branded and clear set of trails for all levels of user, encouraging the widest range of walkers and potential walkers to take enjoy the new investment. All the trails are way marked and multi-use, for walkers and cyclists, with some available for horse riders too. The main trails are accessible via the Tamar Trails Centre car park, situated on the Gunnislake to Tavistock road which has its own interpretation on site.

Main image (top): Tamar Trails Centre, Gulworthy (Image: Simon Burt)

Centre and below: Collaborative way marking signage was developed with careful consultation with all partners
After enjoying the Valley, walkers can head to the newly opened Tamar Trails Centre, adjacent to the car park, which incorporates the Beech Café. This new visitor centre is a one-stop information area and also houses an education and interpretation facility, including a planned project that will soon see live video footage of wildlife on the site – from bats and badgers, to barn owls. It is also the home of outdoor adventure specialists Tree Surfers and Canoe Tamar. Bike and tramper hire (mobility scooters for less abled visitors to gain access to outdoor trails) are available here too ensuring access to all levels of interest and ability.

Besides 9 new trails with a heritage mining theme set out in a new Tamar Trails Booklet, now available at the Tamar Valley AONB Centre amongst other outlets, a range of outreach and oral history visits were undertaken. This ensured the capturing of local wisdom and story; and also importantly categorically handed the heritage into the hands of the local community.

A new audio trail was provided for Tavistock Museum to get people out and around the town and to raise awareness of the World Heritage Site in Devon, both amongst visitors and resident communities.

**Lessons learned and looking ahead**

Investment in local community asset, particularly with such strong links to lives and livelihoods of community members still living in the area, is a crucial way of creating community cohesion. It also ensure a collective desire to engage with and value the asset, which itself is of benefit to the historic landscape, the natural and built environment, and its potential to generate economic benefit to the host community, a pivotal objective for sustainable tourism investment.

**Top two priorities for the future to build on current success**

**a** Engagement of local communities in the local natural and built heritage is critical and will form a central part of future investment opportunities.

**b** Health and wellbeing outcomes are a further outcome of such investment, data capture of which will in future be considered carefully.
1 Population in rural areas benefitting from improved services

The level of physical financial investment on specific sites across the county, improved diversity of offer and enhanced physical and social access has had an impact across all sectors, and inevitably on rural areas of the World Heritage Site. The range of printed material, online material, local events and activities, new World Heritage Site website, audio trails, walks booklet, CMAMA leaflet and interpretation, and improved access and active outreach programmes can be estimated to have reached well over 100,000 in Cornwall and 14,000 in Devon. One attraction alone estimates 365,000 local people to have accessed the site by December 2013.

1 Improved services can be seen in over £1m of financial investment in CMAMA attractions, including new food and drink facilities, new toilet facilities, improved opening hours, and better customer services as a result of trained staff and better facilities.

2 Access to website tools, including trails, audio leaflets and the full range of website tools and data include 24,000 unique visitors from Cornwall and Devon users, indicating high usage of the information and services invested in.

3 Over 250 local businesses were taken on Familiarisation Trips to a range of sites across the World Heritage Site, significantly increasing engagement with the local investment and what it can offer local communities, as well as business. Furthermore, fifty Heritage Champions, businesses resident in Cornwall and west Devon were fully trained in the entire heritage narrative, and encouraged to understand and value their place in the story. All these businesses would have benefited as local residents and members of communities, above and beyond their business role in the tourism industry.

4 Increased shoulder month activity further suggests increased use by local communities out of peak season. Eight out of 9 heritage attractions asked showed a reduction in the importance of August as a visitor month, which combined with the increasing range of site specific local events could suggest a strong upward trend in access by local people.
Local business reported a range of extra community benefit activities undertaken and provided, from volunteering opportunities, to local community events, to access to community facilities such as meeting spaces. One site used the support and profile offered by the DtE programme to help secure money for and deliver a project called ‘Re-engaging the Clay Country with their Heritage’ funded by the Clay Country Local Action Group and Heritage Lottery, a key part of which included the recruitment of a part-time curator and a part education officer. The curator is working to develop the collections and engage more local people with their heritage, providing more opportunities to get involved with the attraction either by volunteering or attending events. The education officer has developed the education offer, worked to engage schools and deliver packages to meet their needs. A transitional educational unit called ‘Clay Country Comings and Goings’ has been created and is available for schools across Cornwall on the ‘Sense of Place’ website. Restormel had an estimated population of just over 104,000 in 2010, projected to rise, the majority of which is in and around St Austell, the town to which this attraction is adjacent.

Opportunities to engage with local sites have been established such as “Friends of” Schemes, and increase in volunteers supported and worked with. On one site the number of volunteers has risen from 7 in 2009 to 31 in 2013.

New events have been hosted onsite to engage more local people and raise the profile of specific sites. These range from Christmas food and craft fairs, paranormal evenings, graffiti and urban culture, local musicians, drama performances, seasonal events such as firework displays and Easter fairs, farmer’s markets, clay play days, health, sports and wellbeing events, engine house tours, pit to port tours, garden opera performance and local heritage weekend (working with local museums). Heartlands alone has seen an estimated 365,500 local people use the site in less than three years since opening.

Local communities are also taking advantage of improved facilities at the Tamar Trails Centre, including mother and toddler groups and local community initiatives. Facilities include the Beech Café, the new visitor centre with a one-stop information area and an education and interpretation facility, including a planned project that will soon see live video footage of wildlife on the site – from bats and badgers, to barn owls. It is also the home of outdoor adventure specialists Tree Surfers and Canoe Tamar. Bike and tramper hire are available here too ensuring access to all levels of physical mobility to the outdoors and the historic mining landscape, previously accessible only to very able-bodied visitors.

Lessons learned and looking ahead

The impact of local authority cuts has been felt in terms of access to data. West Devon Borough Council is now facing the closure of all its TICS and has effectively ended a range of data collection services. Looking ahead, measures would need to be put in place to ensure that data can be collected in ways that are not reliant on standard and usual mechanisms, particularly where they are funded by local authorities. However, the range of community benefit is clearly broad and deep. Future funding streams would do well to ensure that resource is set aside to gather qualitative data throughout the life of the programme to capture the variety and value of all soft outcomes, to ensure that these outcomes and benefits are not lost.
Top three priorities for the future to build on current success

a. Celebrate great community practice amongst heritage related businesses.

b. Ensure soft data is collected on community benefit and response.

c. The World Heritage Site would be delighted to secure the resource to develop a full scale educational programme to bring their heritage to the feet of school children across the site; this is currently being pursued.

“THIS HAS GIVEN ME A REAL UNDERSTANDING OF HOW OUR HERITAGE HAS DEVELOPED, AND WHY. I WOULD BE VERY INTERESTED IN ANY FURTHER SESSIONS IF THEY BECOME AVAILABLE AND OF COURSE ANY EMAILS, ETC. THANKS FOR A GREAT DAY!”

Heritage Champion
Business and resident
Discover the Extraordinary end of project PR evaluation

Introduction

This section outlines some of the key highlights of the Discover the Extraordinary PR activity carried out by Excess Energy Communications. Referring back to the initial objectives for the Cornish Mining World Heritage Site RDPE project, the target audiences for the project were:

- Families looking for a great value day out
- Culture and heritage tourists
- Visiting friends and relatives (VFRs)
- Family learning and “edutainment”
- Walkers
- Ancestral tourists

Some of the main marketing objectives were:

- To increase awareness of the World Heritage Site amongst the target audiences
- To communicate the enhanced tourism offer to target markets and to convert awareness into increased World Heritage Site landscape motivated visitors to Cornwall and west Devon.

Over the course of the project, Excess Energy has communicated in various forms to the target audiences, raising awareness of the World Heritage Site and communicating the enhanced tourism offer, through appropriate target media. A major new press pack, illustrating the depth and diversity of the Cornish Mining World Heritage Site and the variation of the heritage and the vast range of exploratory activities on offer was created. This was utilised across the campaign and accompanied by a range of bespoke press trip itineraries and press releases to prompt the appropriate kind of coverage across a wide range of national, regional, international, local and online media.

Families have been communicated to through titles such as the Daily Mirror Welcome to the Weekend family page, AOL travel, Woman’s Weekly magazine, and the Guardian. Culture, heritage and ancestral audiences have been communicated to through titles such as Heritage Railway magazine, Family History Monthly and the Telegraph’s culture supplement whilst walkers have been communicated to through Walk magazine, Independent on Sunday (and Independent online) as well as the Guardian.

Over 200 pieces of coverage ran over the course of the project covering a diverse amount of stories (please see the table below) across a range of local, regional, national and international print, online and broadcast media. The total PR print value (advertising value x3) is approximately £1,333,589.

Number of articles
Silvia Lowe
Job title: Project Manager
Date: 31 January 2014

With thanks to our Project partners and funding bodies.
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