

**CORNWALL AND WEST  
DEVON MINING  
LANDSCAPE WORLD  
HERITAGE SITE BID  
OUTLINE MARKETING STRATEGY  
APPENDICES**

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## **APPENDIX I: CORNWALL MINING WHS; THE EXISTING PRODUCT**

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### **Background**

Cornwall and west Devon comprised Britain's most important non-ferrous metal mining region producing all its tin, and the majority of its copper and arsenic. Deep copper mining was pioneered in Cornwall during the eighteenth century and by the early nineteenth century it was the most important hard-rock tin and copper mining region in the world. The nature and depth of mining and water drainage and a host of other difficulties were overcome by prolific innovation and engineering achievement, which proved to be of world significance. The inventive genius of a number of individuals was aided by a competent local industrial culture; local foundries became the source of the largest steam engines ever built and Cornish engineering excelled in pumps, winding and other technologies.

During the eighteenth century Cornwall's economy and society was fundamentally restructured as medieval mining traditions were displaced by privately capitalised large-scale organisation. Rapid growth, particularly in copper mining, made Cornwall one of the earliest counties in the nation to industrialise.

By 1830, in terms of scale, output and value, Cornish copper mines surpassed any commercial enterprise in Europe. At this time Gwennap parish was producing over one third of the world's copper and the Consolidated mines was the largest industrial complex known, employing over 3,000 men, women and children.

Environmentally, economically and socially, this relatively small region was utterly transformed. Landscape impact by mining, mineral processing, transport infrastructure and associated settlement was immense. Employment growth in the mines, smelters, railways and ports stimulated economic expansion and population growth. Over forty significant mining settlements emerged, towns and villages of terraced 'industrial' housing and rows of cottages. Huge areas of rough ground were taken into smallholdings and large new farms were created from much of the remaining open land. The industrial middle classes built grand houses and large estates to rival those of the old established land-owning gentry who had become super-wealthy through mining royalties and mining-related ventures. New institutions heralded the beginnings of formal education and progress towards mining science.

The social effects of Cornish mining industrialisation were profound. By the mid-eighteenth century around a quarter of the population was dependant upon mining. A Cornish mining culture was forged by industrial prowess and Methodist faith. Labour – men, women and children – identified with mining districts characterised by different mineral deposits, various ancillary industries and the religion of Methodism. A strong and distinctive Cornish identity evolved.

The world market price for copper had collapsed by 1870 leading to the most significant migration in the life of the Cornish people that, for its size, was one of the most influential migrations in modern world history. From 1840 to 1900 perhaps as many as half a million left - around half went overseas. Today it is estimated that there are up to six million Cornish people worldwide.

Tin mining survived in Cornwall until the close of the twentieth century. The headgears of South Crofty, Geevor and Mount Wellington stand testimony to a current generation of miners, and an enduring identity.

## **The visitor product**

The Cornwall and West Devon Mining Landscape World Heritage Site comprises a series of diverse landscapes areas that contain a distinctive and recurring pattern of buildings, monuments and sites, some of which now offer specific visitor facilities. This distinction is helpful in considering visitor interest, which can be considered at two levels:

- The unique rural – and urban - landscapes created in large part by the impact of mining and a particular way of life. Within these areas, there is a range of physical 'components' that effectively create these 'Cornish' mining landscapes:
- the numerous mine shafts and engine houses<sup>1</sup>;
- old railways and tram roads, industrial harbours and quays;
- mineral processing works, foundries and smelting houses, explosives manufactories and fuse works;
- the housing, chapels, technical institutes, schools and other facilities; and the extensively remodelled houses and estates of landowners, investors and entrepreneurs;
- The opportunity to investigate the stories related to the physical, technical and social mining heritage at a number of visitor facilities.

Much of this product is in the process of enhancement through environmental improvement and specific conservation programmes e.g.:

- Wider regeneration projects at St Just, Camborne / Redruth, Caradon Hill and the Tamar Valley; and;
- Building conservation projects at Harvey's Foundry, Botallack, Perran Foundry etc.

Similarly, there are various related initiatives to improve access in intellectual terms, through interpretation on site and within specific attractions.

## **General description of the product**

The Cornish mining WHS landscape is defined by the geology and the sea. A sloping plateau of rock is incised by river valleys and punctuated by a series of granite uplands conspicuous as a broken central spine through the County. This is

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1 Numerous authentic examples of the vernacular Cornish beam engine house are located within the nominated Site. Settings vary from dramatic sea cliffs to wild open moorland and the heart of village communities. The Cornish engine house, like the Iron Bridge in Shropshire, has become Cornwall's symbol of cultural identity.

surrounded on three sides by coastline. In the east, the river Tamar forms a natural (and political) boundary<sup>2</sup>.

The 10 Landscape Areas are summarised below in terms of visitor appeal; the cultural landscape and the specific opportunities to understand the relevant story(ies). The latter are enumerated according to the Inscription Document prepared for the WHS.

## **A1 St. Just Mining District**

The majority of the mine sites lie within a 6 km long spectacular and rugged coastal belt. The coastal zone exemplifies arguably one of the most aesthetic contexts of the Cornish engine house and 12 survive in good condition. Those at Botallack Mine, for example, are precariously sited on a promontory just above the sea and their dramatic setting has inspired generations of writers, artists and photographers.

St Just is a fine example of a small planned industrial town built to serve the local mines with fine terraces of industrial housing and an exceptional Wesleyan chapel. Bank Square is surrounded by several nineteenth century hotels. Porthledden House is a fine mansion built by Captain Francis Oats, a local miner who became Chairman of De Beers in South Africa. Elsewhere there are a number of good examples of dispersed mining hamlets and clusters of miners' smallholdings.

The St Just Heritage Area Regeneration Scheme involves an on-going programme of environmental improvements in the local area.

### **Visitor facilities within the Area**

**7. Geevor Tin Mine (Pendeen Community Heritage).** The largest preserved 20th century tin mine in the world. The site is dominated by the tall Victory Shaft steel headgear forming a prominent landmark above three square miles of workings down to a depth of 650m and 1.5km out to sea. Geevor lies in an AONB, on the route of the South West Coast Path. The Penwith Heritage Coast – a National Heritage Coast - stretches some 33 miles around the Land's End peninsula from just south of Penzance to St. Ives.

Contained within the site are:

- A complete and authentic range of structures which comprise a Cornish tin mine;
- Archaeological features from the Mesolithic until the late 20<sup>th</sup> century that demonstrate the historic development of mining practices;
- A wide range of equipment demonstrating all processes involved in the industry and including some very rare survivals;
- Underground access for visitors;
- The Geevor Archive which provides key information on the structure and working, the businesses and their employees;

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<sup>2</sup> The WHS site extends beyond the Tamar Valley to the west Devon town of Tavistock.

- An Oral History Project has been running which is recording and making available more of the human stories of Geevor through the interviewing of a wide range of people associated with the mine and the village of Pendeen;
- A Local History Room which is well used by local people and volunteers to explore all aspects of local history;
- The museum consists of a series of gallery spaces: the orientation room which provides an introduction to tin mining in Cornwall and at Geevor; two galleries which contain a number of models, as well as artefacts and documents; a mineral gallery; a room where a film on Geevor is presented; two galleries which are used for temporary exhibitions; and finally, the mine model room with a huge three dimensional scale model of the underground workings in the area;
- Interpretation panels;
- Guided/self-guided tour of processing mill; picking belt, shaking tables, tube, ball and regrind mills, drier, magnetic separator;
- Guided tour underground.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
7.	All year	●	£6.50	●	●	●	●	●	●	32000

Current proposals are the subject of a current HLF bid and include:

- Visitor access for a new underground tour;
- Restoration of surface buildings and structures;
- Ecological conservation;
- Expanding educational provision;
- New museum.

**16. Levant Mine and Steam Engine (National Trust).** A restored engine house, perched on the cliff edge, contains the oldest survival of a Cornish steam engine (1840) still in situ, brought back to working order by volunteers. Man Engine Shaft has recently been made safe and the top section can be accessed via the emotive spiral granite staircase and tunnel that leads to the scene of one of Cornwall's worst mining disasters when 31 miners were killed in the shaft due to mechanical failure.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
16	March -Oct Varies		£4.00	●	●	●			●	15000

**2. Botallack Count House (National Trust).** A conserved count-house owned by the National Trust and used as their warden's base, and as an interpretation point for this stretch of mining coast (free). The adjacent calciner is currently being conserved and interpretation will be updated. The site is used by the community and so public access is on an ad hoc basis. It does not feature strongly in National Trust promotions.

#### Visitor facilities just outside the Area

**34. Wayside Folk Museum, Zennor (Private).** Interesting collection related to local social history, including mining.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
34	April- Oct 6 days		£?		●			●	●	N/a

**24. Rosevale Mine (Private).** No information.

#### **19. Penlee House Art Gallery and Museum (Penzance Town Council).**

Refurbished in 1997 as the home of the historic collections of Penzance Town Council and Penwith district Council. Displays include mining history and photographic archive.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
19	All year		£2	●	●	●	●	●	●	37000

**Royal Cornwall Geological Museum, Penzance (Royal Geological Society of Cornwall).** 2,000 visitors in the past. Now closed.

## **A2 Port of Hayle**

The Port of Hayle holds a distinguished place in Cornish economic and social history. The Area comprises the principal surviving historic fabric of the largest integrated mining port and steam engine manufacturing centre, anywhere.

Hayle was dominated by two of the largest iron foundries in South-West Britain, Harvey's and Copperhouse. Key industrial and public buildings survive, together with good examples of housing that reflect the social divide of industrial labour (high density workers' terraced housing) and management (villas and mansions). Other notable features in the vicinity include the oldest surviving railway bridge in Cornwall at Lethlean and a railway swing bridge, with machinery still intact, crossing Copperhouse Canal.

The scale of the built heritage is impressive including the great harbour spit of Middle Weir, Copperhouse Canal and sluicing pools and the Causeway road, one of Cornwall's greatest road engineering monuments. The extensive quays and wharves survive largely intact and accentuate the character of broad open space created by one of the most outstanding estuarine settings in Europe.

### **Visitor facilities within the Area**

**11. Harvey's Foundry.** Around 25 historic structures of the great Harvey's Foundry survive in a relatively coherent group. This is where the largest steam engines in the world were produced and the greatest number of mine steam engines exported, globally. There is no formal visitor access or facilities at present.

This complex is currently the focus of a major, three-phase conservation project by a local partnership established to develop proposals for the regeneration of the area. Some refurbishment and new build has been completed in Phase 1. A local records archive will be provided for the records from Harvey's Foundry which have survived intact. Phase 3 (2005-8) will include the main public uses e.g. a heritage centre, backpackers' hostel and an open square.

## **A3 Tregonning and Gwinear Mining Districts**

The granite cone of Godolphin Hill and the long ridge of Tregonning Hill dominate the southern part of this ancient mining district, with the engine house and chimney stack of Great Work mine visibly prominent. Some of the richest and, at times, the deepest tin and copper mines occur within this Area. To the north, the landscape is a mixture of gently rising downland on which a patchwork of smallholdings and new farms has been created. These are interspersed with long-established farms and land associated with the great mining estates of Godolphin and Clowance. Most miners' cottages are dispersed in a landscape of small fields or set in small groups, though larger settlements of highway villages with fine industrial terraced cottages exist notably at Praise-an-Beeble and Leedstown. A number of engine houses form landmarks in the Area and the sheer density of mine shafts in the landscape is impressive. Some mark the site of some of the earliest steam engines, on metal

mines, in the world. (The finest and most extensive example of open-cast tin mining within the nominated Site survives at Great Wheal Fortune.)

The Trewavas coastal enclave in the south of the Area contains some important remains that mark the sites of old undersea copper mines. The cliff-slope engine house of Wheal Prosper was acquired by the National Trust and consolidated in 1971. The dramatic cliff-side engine houses, shafts and impressive capstan platform of Wheal Trewavas are amongst the most spectacular in their situation, anywhere. Many engine houses in this attractive coastal area are unstable and are at risk and efforts are presently being directed towards their consolidation in the near future. Public access is difficult via a narrow lane leading to a small car park.

### Visitor facilities within the Area

**9. Godolphin House (Private) and Estate (National Trust).** Godolphin Hall is one of the most charming and architecturally important houses in Cornwall. Grade I mansion (in final phase of restoration) with Elizabethan stables surrounded by formal gardens (about to be restored). Sir Francis Godolphin (Lord of Godolphin from 1575-1608) was a mines adventurer and established an exceptional tradition of pioneering mining and tin processing technology.

The National Trust bought the Estate in 2000 (550 acres) and the conservation of the important pumping engine house (1829) and separate tiered mine chimney stack at Leeds' Shaft of Great Work mine is now complete. The fine count-house of Godolphin copper mine has also been conserved and serves as their warden's base and education centre amidst deeply disturbed ground of pits, waste dumps, leats, pools and shafts. The historic landscape includes Godolphin Hill, from which there are wonderful views over west Cornwall, and more than 400 recorded archaeological features ranging from Bronze Age enclosures to dramatic 19th-century mine buildings.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
9	Easter-Sept Estate All year		£5 Free to estate	●	●	●	In house	In house	In house	N/a

**31. Trevarno Estate and National Museum of Gardening (Private).** House, gardens and large garden centre originally funded by mining wealth. No specific mining theme picked out at present.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
31	All year	●	£4.75	●	●	●	●	●	●	48000

### Visitor facilities just outside the Area

**12. Helston Folk Museum (Kerrier District Council).** Excellent social history collection, including mining heritage. 10-15,000 visitors p.a.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
12	All year		£2.00					●	●	15000

## A4 Wendron Mining District

The sparsely populated upland area of Carnmenellis contains the most extensive and best-preserved evidence for miners' smallholding intakes in Cornwall. Mining was in granite 'country', relatively shallow and principally for tin. It was mostly restricted to the area around Porkellis and Wendron where there is good evidence for extensive alluvial tin mining in the form of flooded pits, industrial watercourses and waterwheel pits. Shaft mine sites complement these and some fine engine houses are scattered within and surrounding the settlements. This is one of Cornwall's oldest mining areas where tin was worked from prehistoric times until the twentieth century. The early nineteenth century chapel at Porkellis was converted into a school room when the 1866 chapel was built alongside. It contains one of the most complete internal survivals of a large rural chapel in Cornwall.

### Visitor facilities within the Area

**21. Poldark Mine and Heritage Complex (Private).** The mine was originally worked sometime between 1720 and 1780. In 1856 it became part of the Wendron Consols Mine and is shown on the surface plan of that mine as '*old men's workings*' meaning that it was at that date considered a very old mine. Because of the unusual way in which Wheal Roots Lode had been worked there is little doubt that it had been discovered by tin streamers in the bed of the River Cober and was from there mined into the hillside.

The site is a multi-faceted family leisure attraction. Access to the site is free but there is an admission charge for the underground mine tour. Contained within the site is a mixture of buildings and structures which house:

- Amusements, children's play areas etc;
- A restaurant;
- Shops and craft workshops;
- Various industrial machines; and
- Workshops / interactive activities including pottery painting, pottery throwing, candle making, tin and gold panning, dousing;
- A museum; and
- Access to the mine.

The physical appearance of the site disguises the genuine heritage qualities of the museum and underground experience.

- The museum gives an overview of: the early history of tin extraction in Cornwall; the rediscovery and exploration of the mine; the early history of the use of explosives in Cornwall; the history and development of steam engines in the County; the Cornish overseas. The museum is being refurbished with new exhibitions and Poldark is developing as the interpretation centre for the Wendron area.
- The guided underground tour of the mine takes approximately one hour. Up to 30 visitors are taken on a tour. About two thirds of all site visitors (85,000) take the mine tour for which a charge is made.

Cornwall Wildlife Trust manages a woodland garden area on the site designed to encourage wildlife.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
21	April-Oct	●	£5.95*	●		●	●	●	●	56000*

\* Charge and visitor numbers for mine tour.

The owners are considering all year opening.

## A5 Camborne and Redruth Mining District

The steep granite ridge of Carn Brea dominates the area as a reminder that it brought the district unbelievable mineral wealth with some of the richest, and deepest, eighteenth century copper mines and nineteenth century tin mines in the world. It is crowned by a 30m tall granite obelisk as a public memorial to Sir Francis

Basset, the principal mineral owner of the district. Much of the surrounding landscape was developed within an historic landscape to the designs of the Basset family and other mineral 'lords'.

The mining towns of Camborne and Redruth, connected by continuous ribbon development of settlement and modern light industry, comprise a major area in the north. To the south is a greener landscape with dispersed mining villages and farms, and one of the most compact and best-preserved engine house landscapes anywhere.

Throughout the eighteenth and nineteenth centuries Redruth was west Cornwall's principal market town and capital of the Cornish mining industry. It possesses some of the most splendid Victorian urban architecture in the region, particularly in and around Fore Street and Penryn Street. In Wesley Street there is an imposing pair of buildings dedicated to Methodism - the Redruth Wesley Chapel and the Wesley Memorial Hall. The fine landmark chimney of Pedn-an-Drea mine, one of Cornwall's highest chimneys at 44 metres, serves as a cultural icon to Redruth.

Camborne contains the best example of large-scale urbanisation associated with the Industrial Revolution in metal mining and engineering. It is a town forged by industry and the industrial architecture of the world-famous Holman's Foundry & Rock Drill Works, alongside terraces of high density industrial housing and some fine public buildings such as the Centenary Wesleyan Chapel. To the west, are the larger houses and villas of the managerial classes. Near the railway station is the bronze statue of Richard Trevithick, Camborne's most famous son.

Along the strike of the Great Flat Lode there is the finest surviving assemblage of engine houses along a single mineralised fault anywhere. The landscape between and beyond the high hills of Carn Brea is characterised by engine houses, tin dressing floors, extensive tramway beds, mining settlements and the site of the largest tin smelter in Cornwall. The mining heritage here is exceptionally rich in built remains. A number of engine houses are particularly fine examples that demonstrate a range of pumping, winding and stamping functions. Some form landmarks either singly or in pairs but together, from certain viewpoints, they form one of the most impressive views of nineteenth and early twentieth century metal mining.

Portreath Harbour dates from 1760 and was built by the Basset family principally to import coal and export copper ore. The Portreath Tramroad linked immensely rich mines such as Poldice and North Downs with the harbour and in 1838 the Portreath branch of the Hayle Railway was opened. The latter is famously marked by a major piece of railway engineering - the Portreath Incline.

The Mineral Tramways Heritage Project is an-going scheme to make accessible an extensive integrated network of multi-use trails, based on the old tramways, centred on Camborne and Redruth. The two existing trails were completed some time ago:

- The 10.5km Great Flat Lode Trail around Carn Brea which explores the greatest concentration of historic mine buildings anywhere in the world with sweeping views of the historic landscape; and
- The 17.5km Coast to Coast Trail from Portreath to Devoran.

The new project will involve:

- The creation of a further 28km of multi-use trails (the Tolgus Trail, Portreath Branch trail, Redruth and Chasewater Railway trail etc),

connecting with the existing to provide a 60km integrated network linking mine sites, attractions, settlements, visitor facilities and public transport;

- Conservation of 14 mine sites;
- Village enhancements in 13 villages with links to trails; and
- Marketing, interpretation and education programmes.

### Visitor facilities within the Area

**35. Cornwall's Industrial Discovery Centre, Pool, (National Trust).** The present-day concentration of three surviving Cornish beam engines in their authentic metal mine context is unparalleled. One engine has been restored to working motion and the other two pumping engines have the capability to work again.

- A 30-inch cylinder beam winding engine survives at Michell's shaft of **East Pool Mine** on the main road and is open to the public. It was saved from being scrapped in 1941, was taken over by The National Trust in 1967 and set back in motion (by electric motor) again in 1975. There is a car park and small interpretation centre.
- Across the main road is **Taylor's Shaft**, part of the same East Pool Mine. This site has been refurbished to turn it into the Cornwall Industrial Discovery Centre. The exhibition includes an AV display in the boiler house and a walk through the exposed brick boiler flue and chimney. There is a fine 90-inch cylinder pumping engine. This survives as part of a 'modern' (1920's) single-phase complex that additionally comprises a winder house, compressor house, two boiler houses, capstan house, miners' dry, office and primary crushing and ore-loading stations. This is an important interpretation centre for the whole WHS but the site is hidden behind the supermarket car park and the surroundings leave much to be desired as a major visitor destination.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
35	April-Oct 6 days	●	£5.00	●	●	●	●	●	●	16000

**23. Robinson's Shaft, South Crofty (National Trust).** Robinson's Shaft is a collection of derelict but substantially complete mine buildings (1903-6) with engine house and an 80-inch cylinder pumping engine, the last to stop work on a Cornish mine in 1955. The complex formed the core of South Crofty Mine for the majority of its existence. There is no existing access to the site. The Urban Regeneration Company has phased plans to create a "working heritage" mixed use site involving the creation of a unique and innovative geology/exploration themed visitor attraction

for Cornwall. Key aims would be to interpret the geology of Cornwall and hard rock mining and act as a gateway to other related sites. Interpretation would include:

- Mining, exploration, surveying and engineering;
- Social history linking people, landscape and culture; and
- Rocks, minerals and crystals, a potential home for the Cornwall School of Mining and Penzance Geological Museum collections.

**South Crofty Mine, Camborne (Private).** South Crofty mine was Europe's last working tin mine, closing in 1998 when the pumps were turned off and the mine allowed to flood. Since late 2003, the Cook's Kitchen sett has been opened for visitors as a 'temporary' measure, pending possible re-opening of the modern mine. The pre-booked underground tours lasts for 70 minutes costing £5-7.50 per adult. There are no dedicated visitor facilities. There are proposals to open other workings should the mine re-open.

**14. King Edward Mine, Troon, Camborne.** This was a training site for the world-famous Camborne School of Mines. There is a miniature mine with a miniature processing plant, a lecture theatre and the remains of all the other surface buildings of a mine at the turn of the 19th Century but no underground access. It contains a working museum with a collection of late 19<sup>th</sup>/early 20<sup>th</sup> century tin processing equipment. The site only opened last year to visitors and visitor numbers have been disappointing.

For many years volunteers have been restoring the Mill, which still contains the last working Californian stamps in Britain, together with working examples of round frames, rag frames and a Cornish buddle.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
14	April-Sept		£3.00	●	●	●		●	●	834

**3. Camborne Museum (Town Council).** A small room above the library with traditional displays on mining and Trevithick. Open all year for a short time each day.

**4. Camborne School of Mines and Geological Museum (Exeter University).** Recently closed to public. Used to attract c10,000 visitors. Contains National Trust's 'Norris' collection of minerals.

**22. Redruth Museum (Redruth Old Cornwall Society).** A small local museum in 2 rooms above Barclays Bank. Open three days a week. Small collection of mining models, artefacts, documents, photos and minerals.

**36. Murdoch House** in Cross Street, Redruth is where mining engineer William Murdoch (1754-1839) lived whilst he worked on local mines. He invented gas lighting in this house in 1792 supplied by the world's first gas pipeline. Open one morning a week for community use. No exhibition or interpretation.

**5. The Cornwall Centre** is the home of the Cornish Studies Library. This contains a good collection of mining and related historical and contemporary publications including a complete set of The Mining Journal one of the best primary resources for historical research into the industry. Interpretive panels on mining heritage and Cornish emigration.

### Visitor facilities just outside the Area

**30. Tolgus Tin.** Now forming part of the Cornish Gold Centre on the Portreath road near Redruth, this site is the largest and most complete of only two tin tailings works that now survive in Cornwall. (Working waterwheel and tin stamps.) Tolgus Tin contains much original equipment and machinery that is being gradually restored to working condition to explain the process of streaming for tin in Cornwall. Good wheelchair access and suitable for visually impaired. Visitor numbers dropped significantly in 2003. The site is leased by The Trevithick Trust from Cornish Goldsmiths, a major retail outlet attracting c300,000 visitors to an adjacent site.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
30	Feb-Dec		£2.50	●		●	●	●	●	10000

**32. Trevithick's Cottage.** Richard Trevithick's childhood residence, owned by The National Trust and administered by The Trevithick Trust. An attractive thatched cottage, close to Camborne in the village of Penponds, with a 'Trevithick' room full of memorabilia. Managed by Trevithick Trust on behalf of the National Trust but only open on Wednesday afternoons between April and October. Donations accepted.

**33. Waterfront Inn, Portreath.** A harbourside pub with excellent collection of photographs and interpretive panels telling the story of the harbour and associated transport of copper and tin ore through the port, making use of the tramways.

**Wheal Peevor.** Wheal Peevor is a rare survival of a classic triple arrangement of winding, pumping and stamps engine houses (*circa* 1875), visible from the A30 trunk road. Restoration work is in progress and it will be linked with the Mineral Tramways project.

## A6 Gwennap Mining District with Devoran and Perran and Kennall Vale

The widespread effect of copper mining can be appreciated best in this area which includes Gwennap, the "richest square mile to be found anywhere on earth". The desolate landscape is carpeted with waste rock with islands of building remains or shafts. Amongst several prominent engine houses, the example at Wheal Henry may well be the oldest still standing in Cornwall.

The central and northern sections of this Area are notable for their well-preserved landscape of smallholdings interspersed with small mining settlements and the mines that they served. St Day and Chacewater are particularly fine examples of mining villages and the groups of well-preserved engine houses are striking features of this landscape. Scorrier House, Tregulow and Burncoose are fine examples of grand houses and estates built for mining industrialists. These predominantly belonged to one family - the Williams', one of the greatest mining dynasties in the Old World.

In the lower end of the important and heavily industrialised Carnon Valley is the terminus of the Redruth & Chacewater Railway and the important copper mining port of Devoran.

Annexed to the southern part of the Area, and with historical linkages to the port of Devoran, is the attractive steeply wooded Kennall Valley that contains two concentrations of exceptional mining ancillary industrial monuments, Perran Foundry and Kennal Gunpowder Works.

The Historic Churchyards Project aims to create a resource within the five villages of Lanner, Stithians, Gwennap, St Day and Carharrack where the churches contain records of the traditional mining community. The project involves enhancing and interpreting the churchyards (supporting the genealogy market) and the creation of 17km of trails to link them and the Mineral Tramways Trails.

### **Visitor facilities within the Area**

**10. Museum of Cornish Methodism, Gwennap Pit.** Gwennap Pit is an open-air preaching pit that dates from the mid-eighteenth century. It was used 18 times by John Wesley and by the 1780's he was preaching to crowds of 20,000. Its stepped amphitheatre form dates from 1806. Open all year but the visitor centre is open Spring BH to end of September, 6 days/week. 15,000 visitors to Pit. Free entry.

**28. St Day's Church.** Work started in September 1999 to stabilise this derelict ruin so that it could be used for open-air concerts and events. The first phase has been completed (Nov 2000). It could also become a centre for the interpretation of the Mineral Tramways routes around the St. Day area. Resources are now being sought.

**20. Perran Foundry.** The foundry and wharf is situated at the uppermost tidal point an inlet off the river Fal with associated inn (Norway Inn), managers housing and workers' cottages (Foundry Terrace).

The foundry, one of the three largest in Cornwall, remains almost intact but is in a state of decay. It is one of the most important industrial monuments in southern Britain and - of its date and type - in the world. Amongst a number of fine foundry buildings, is an ornate cast-iron bridge, each side having been remarkably cast in a single section. Perran Foundry was capable of manufacturing very large items, but the particular importance of the site stems from its prominence in the development of beam engine technology in the first half of the 19th century. Its engines were exported all over the world.

The current owners anticipated development for residential and business uses, with some of the original buildings retained as a heritage centre. Enabling planning permission for this scheme, to allow for conservation of the foundry buildings, has now expired and fresh discussions about the foundry's future have been initiated. There is no visitor access or facilities at present.

Please note: The Mineral Tramways Heritage Project also has a presence in this area as well as the Camborne and Redruth Mining District (section A5). This includes five of the sites and much of the Redruth & Chasewater Railway Trail.

### Visitor facilities just outside the Area

**25. Royal Cornwall Museum, Truro (Royal Institution of Cornwall).** County museum and art gallery with room devoted to mining and a world famous mineral collection of over 10,000 specimens, including the 18th century Rashleigh collection. Subsidiary themes include ecology, local history, engineering, social history. Fully accessible. 119,000 visitors in 2003 (large proportion free entry), including over 6000 in educational groups.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
25	All year	●	£4.00	●			●	●	●	119000

### A7 St Agnes Mining District

St. Agnes, like St. Just, exemplifies the coastal mining tradition. St. Agnes Beacon overlooks the mining village of St. Agnes with its fine Miners and Mechanics Institute and a landscape of tin and copper mining. Engine houses form landmarks for miles around, on cliff tops and valley sides and within the very heart of the village.

Wheal Coates is dominated by a fine survival of a winding, stamps and pumping engine house trio on the cliff-slope in one of the most aesthetic settings in the Cornish mining landscape. The lower engine house at Towanroath shaft, overlooks the surfing beach below, and is a widely-used contemporary Cornish icon. Apart from these buildings, there is a wide range of mining archaeology in attractive heathland.

Immediately to the north of St Agnes some fine engine houses overlook Trevaunance Coombe, a valley with steep sides carpeted with waste rock dumps that form a ubiquitous landscape feature. Trevaunance Cove contains the remains of several harbours, each destroyed by the sea. The cliffs are riddled with mine workings and above is Trevaunance House, once the manor house of the Tonkin family.

The high and often sheer cliffs eastward to Perranporth have been extensively worked by small, and in many cases, ancient mines.

### Visitor facilities within the Area

**1. Blue Hills Tin Stream Works.** Reputed to be the last remaining tin producing centre in Cornwall and the UK. A tour encompasses the production process - from mining through smelting to the finished dressed tin. This is a traditional working site

with waterwheel, Cornish tin stamps, buddle, shaking table, the furnace, production of ingots and jewellery. It is possible to handle tin stones, watch them being crushed and processed. Retail outlet. Set in magnificent coastal location but with difficult road access.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
1	All year		£4.00		●	●		●	●	N/a

**27. St Agnes Museum.** A local history museum featuring various artefacts and exhibits detailing the area's mining and seafaring heritage. Free entry.

## A8 The Luxulyan Valley

The Luxulyan Valley is exceptionally attractive with steep boulder-strewn slopes surrounding the fast-flowing River Par. This Area contains an extraordinary concentration of early nineteenth century industrial remains that were the realisation of one man's vision and enterprise – that of Joseph Treffry, perhaps the greatest single mines adventurer in Cornwall.

The industrial archaeology of transport dominates. The Treffry Viaduct & Aqueduct is 27m high above the river and has a span of 200m. It carried the 1835 tramway and the aqueduct carried water to work an inclined plane for the tramway. The fine stone-faced Fowey Consols leat is the earliest civil engineering construction built by Treffry in the Valley and provided the water supply to the Fowey Consols waterwheels. The Par Canal was also constructed by Treffry to take copper ore from the base of the Fowey Consols inclined plane railway to the port he constructed at Par.

The Luxulyan Valley Project involves refurbishment of the leat system running through the valley and the renovation and re-use of a former China Stone works.

Charlestown was designed by John Smeaton, the foremost civil engineer of the day and is one of the finest examples of late eighteenth and early nineteenth century industrial harbour works in Britain. The Georgian port has remained relatively unchanged. It represents a rare example of a mineral port specifically built with its own defences.

### Visitor facilities within the Area

**26. Shipwreck Centre, Charlestown.** This well-known and well established museum is housed in an old 'clay dry' built on top of the tunnels formerly used to transport the clay to the harbour. The museum is focused on wrecks but has a collection of minerals and artefacts from Cornwall mining.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
26	March -Nov	●	£4.95	●			●	●	●	N/a

### Visitor facilities just outside the Area

**Wheal Martyn Museum, Carthew.** A 26 acre site covering two former 19th century china clay works. The story of clay mining is told from 1800 to present day with various trails. The historic trail takes the visitor through the old clay works. The Nature Trail goes through man-made and natural habitats and to a viewpoint over current workings. Facilities include; trails, exhibitions, AV show, children's adventure trail and picnic areas.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
	All Year	●	£5.00	●	●	●	●	●	●	29000

### A9 Caradon Mining District

Located in the south-eastern corner of Bodmin Moor, this area is characterised by open and exposed granite high moorland landscape, mostly above 300m OD. The granite dome of Caradon Hill (404m OD) dominates the Area and engine houses, chimney stacks and waste rock tips encircle the hill.

Although there is exceptional evidence for tin streaming at Gonamena, it was the extraordinary copper riches of South Caradon Mine that were responsible for the rapid development of the Caradon Mining District. Over a period of fifty years its copper output ranked third in Cornwall.

Minions is a fine example of a mining settlement that sprang up from nothing, unconstrained in its development. On higher ground, there are well-preserved ancient open-workings on a tin lode at Stowe's mine, near to which a small shaft connects with some of the most impressive underground mining caverns (stopes) accessible in Cornwall. "Phoenix" is a mine that ranks of international significance in terms of mineralogy.

The Caradon Hill Heritage Project is a package of mine site conservation, village improvements and major landscape enhancements linked to access improvements and an interpretation, education and marketing programme i.e.:

- Conservation and safety works to 87 structures at 9 mine sites;
- Conservation of key landscape features in 9 different areas;
- Enhancement of the village centres of Minions, Upton Cross, Pensilva and St Cleer;
- An integrated trails network of 52km including 8.8 km of multi-use trail around Caradon Hill following the track of the Liskeard & Caradon railway;
- An interpretation and education programme.

### **Visitor facilities within the Area**

**13. Minions Heritage Centre.** Set within the restored old Houseman's engine house, the centre has an interpretive display on mining in the local area. Evocative site with parking. There are proposals to restore two upper levels, re-focus interpretation on the mining heritage of the Caradon Hill area and community involvement.

### **Visitor facilities just outside the Area**

**17. Liskeard Town Museum.** A new, attractive local museum focusing on social history but with a small subsidiary theme of mining and mineralogy (exhibition of minerals, artefacts and narrative on mining adventurers and displays on how miners worked and lived). C10,000 visitors per annum. Open all year.

## **A10 Tamar Valley Mining District with Tavistock**

The granite dome of Kit Hill (333m OD), crowned by a landmark ornamental mine chimney, dominates the western part of the Area. The mining landscape on the Cornish side of the Tamar has much in common with other areas of the county where mines and smallholdings developed in open moorland. Cottages are typical of mining vernacular, clustered together in rows and small hamlets.

The steeply wooded Tamar Valley forms the principal central landform of the district. Whilst generally running from north to south, its great loops form a sinuous, changing course. The landscape further to the east is rolling cultivated countryside that descends to Tavistock in the foothills of the high granite uplands of Dartmoor.

The mines of this district exploited an important concentration of tin, copper and arsenic lodes whose outcrops mostly run parallel with the east-west axis of the granite and were worked from Callington to Tavistock. Many are located in the Tamar Valley, some being worked beneath the river bed.

For all local mines their natural highway was the Tamar. The quays that lined its banks proved inadequate to deal with the volume of traffic created during the 19<sup>th</sup> century, and both Calstock (Cornwall) and Morwellham (Devon) were developed as industrial ports with rail links to their mining hinterland. The East Cornwall Mineral Railway, linked Calstock with Callington. Its route connected a number of mines, arsenic works, granite quarries, and brick, tile and fireclay works via an incline plane

railway with nearly 0.5km of quays at Calstock. Here the mining village developed into a huddle of steeply terraced roads and houses constrained by the steep topography.

For many mines, the Tamar was the principal power source, ingeniously harnessed in a manner virtually unsurpassed in British metal mining. The Area is consequently richly endowed with waterwheel pits, perhaps more so than any other. The examples at Wheal Brothers and Wheal Benny are spectacular.

Morwellham is strategically sited in the centre of the southern edge of the Tamar Valley Mining District at the river Tamar's highest navigable point. It is 3km below the tidal limit near Gunnislake. It occupies the floodplain of a wide meander and is backed by sharply rising and thickly wooded valley sides that rise to over 180m.

Mining connections date back to medieval times and as a tin coinage 'town' was the last to operate in Devon in 1838, the year that coinage was abolished. During the early nineteenth century it was connected to Tavistock (6.5km away) by the Tavistock Canal (completed 1817) and shipped all of the ore from Wheal Friendship, Crowndale Mine and others. It was the busiest inland river port west of Exeter, taking vessels up to 300 tons. In the mid-nineteenth century it was the greatest copper ore port in the world due to the extraordinary output of Devon Great Consols to which it was connected by a mineral railway and incline plane in 1859. By the middle of the nineteenth century the population had trebled (to over 200 people) and the Duke of Bedford built twenty model cottages, a school and the Wesleyan Chapel (1859).

Devon Great Consols is the largest copper mine in the nominated Site and is now mostly in forestry. Virtually all of the mine buildings were removed by the Duke of Bedford when the mine closed in 1903, but much still remains both above and below ground. The dwellings that survived are scattered managers' houses and the fine Wheal Josiah Cottages. The most obvious landscape features are the immense spoil heaps, coloured red, black and ochre, utterly dominating the valley slopes as a major landform. The mineral railway bed and several bridges remain together with tramway routes, shaft sites and some exceptional reservoirs.

Rolling cultivated countryside to the east of the Tamar Valley Mining District was mostly vested in two great historic families: the Edgecumbe family and the Russell family, later the dukes of Bedford. The latter benefited from one of the largest royal land grants in English history in 1539, and became the third largest landowner in Britain. This land ownership has impacted on the landscape. Farms tend to be large and there are few settlements.

Tavistock is centred on former abbey lands on the level plain north of the river Tavy. Later owned by the Dukes of Bedford, it was one of four principal markets of the internationally significant medieval Dartmoor tin industry and became a Stannary 'coinage' town in 1281. The mining industry led to population growth and development during the nineteenth century. Slums were swept away and fine Victorian public buildings replaced them. The townscape today reflects the extreme wealth that mining can bring. Both in architecture and plan Tavistock exudes confidence. Much of the mining workforce were housed in several hundred model cottages built within the town, at the mines, at Gulworthy and at Morwellham.

There is substantial survival of the three nineteenth century iron foundries in Tavistock. The remains of Rundle's and Gill's Mount Foundry in Parkham Road are extensive and outstanding, including associated workers' cottages.

The link between Tavistock and its mining hinterland and the Tamar port of Morwellham is by the Tavistock Canal, one of the finest surviving examples anywhere of a mineral canal constructed to carry copper and lead. Old warehouses, cottages and an ore storage floor (now a car park) mark the Tavistock Old Wharf. The canal, 7.2km long, remains in water, in very good order for its entire course through attractive landscape. It crosses the river Lumburn near Crowndale by a stone aqueduct and before it reaches Morwellham it narrows to 2m wide as it passes through a 2.4km long tunnel. Above Morwellham is the basin (now dry) and canal keeper's cottage at the head of the waterwheel-powered incline plane railway which connected with the quay below.

The East Cornwall Regeneration Project involves conservation and access works in the Tamar Valley and Kit Hill areas. It involves:

- Conservation work to 73 structures at 11 mines and 4 quays, including Cotehele;
- Access improvements to mine sites including creation of 23km of the Copper Mining Trail (a 36km trail from Liskeard to Calstock via the Caradon Hill, Kit Hill and Gunnislake) linking the mine sites;
- Village enhancements to 5 villages;
- Marketing and interpretation.

### **Visitor facilities within the Area**

**18 and 8. Morwellham Quay with George & Charlotte Mine (The Morwellham and Tamar Valley Trust).** Since 1970 the Morwellham and Tamar Valley Trust have managed the site as an open-air museum of living history. The docks and harbour were cleared of silt, the quays and buildings of the undergrowth which obscured them. Warehouses, workshops and houses were restored to their mid-19<sup>th</sup> century appearance and used to interpret the history and development of the port. In the late 1970s the George and Charlotte mine, a small 18<sup>th</sup> and 19<sup>th</sup> century copper mine, situated 400 metres from the village, was made accessible to visitors via an electric tramway. A son et lumiere presentation underground introduced viewers to the harsh realities of working life for miners. Shortly afterwards live, costumed interpreters were introduced to people the houses and workshops and to help visitors delve more deeply into the domestic and working lives of former inhabitants of the village. Events are an important part of the interpretation.

By the mid and late 1980s the site was visited annually by over 150,000 people. However insufficient funds were set aside to fund significant new investment. The result of this, coupled with increasing competition from new attractions, was that visitation to the site fell throughout the 1990s reaching a low point in 2001. The last two years have seen a modest recovery, with the site being visited by 50,000 people annually, of which a significant proportion (30%) are organised educational groups. Current visitor research indicates that of the remaining visitors 35% are return visitors to the site.

The Trust seeks to re-position Morwellham as a flagship cultural tourist destination in the southwest. This would be achieved by:

- Extending and enhancing the industrial and archaeological heritage aspects of the site;

- Integrating Morwellham's waterfront with other improvements for visitor access to the AONB in the Tamar Valley;
- Making the displays more accessible through better interpretation of the social and economic context and through educational activities.
- Upgrading the tourist facilities and traffic circulation areas to improve visitor comfort.

To achieve the above Morwellham will require a major programme of revenue and capital expenditure. The areas to be included within this would be:

- Archive and conservation research to underpin the development strategy;
- Heritage buildings: refurbishment of existing buildings and rehabilitation of new areas not yet restored;
- Improved visitor facilities: cafeteria, gift shop, toilet and washroom facilities, and extension of disabled access;
- Displays in museums to be re-designed to interpret the geography, geology and mineralogy of the whole area as well as providing a more vibrant, interactive visitor experience. Restoration of manganese mill, improved access and interpretation of inclined planes, interpretation of lime kilns;
- Infrastructure: access roads, car-parking, riverfront, ferryboat access;
- Information technology: multimedia approach to interpretation of the archaeological and social records;
- Refurbishment and interpretation of the Managers House as an early 19<sup>th</sup> century house and offices;
- The school room/United Free Methodist Meeting Room be restored to its 1906 appearance as a venue for: temporary exhibitions; small conferences and team-building exercises; the celebration of civil weddings;
- A new audio-visual interpretation is put in the mine, which uses the actual testimonies of 19<sup>th</sup> century miners;
- Restore the Devon Great Consols Dock and Quays, Higher and Lower Copper Quays and the Canal Dock and Quay to the appearance shown on the 1906 photograph;
- A new interactive play area themed on waterpower;
- Marketing: a re-launch and business development programme over three years;
- A field studies centre in the former malt-house will build upon and extend Morwellham's existing, highly successful, educational programmes for primary, secondary and higher education and for courses in the management of the landscape. This building will also provide space for a new retail outlet specialising in Tamar Valley produce and for Morwellham's archive and library;

- The Tamar Valley Mines Heritage Project currently being developed by the Tamar Valley ANOB has secured funding from SWDRA. A sum of £1,000,000 is budgeted to be spent at the attraction.

The Tamar Valley Mines Heritage Project estimates that there will be additional 55,000-day visitors and 7,000 additional staying visitors. It is not unrealistic to expect that 35% of these visitors will visit Morwellham when the extra investment has been injected into the site, together with increased marketing.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
8 & 18	All year		£6.00	●	●	●	●	●	●	50000

**15. Kit Hill Country Park (Cornwall County Council).** 110,000 visitors per annum. This is a major landmark and an outdoor recreation area in an area of old mines. Some on-site interpretation panels, leaflets, talks, walks and an archaeological book are provided. Parking available, with great views (including Devon Great Consols). No current plans. Needs better links with adjoining areas. Open all year.

**6. Cotehele Quay.** The house at Cotehele was mainly built between 1485 and 1627 and was a home of the Edgcumbe family for centuries. Its granite and slatestone walls contain intimate chambers adorned with tapestries, original furniture and armour. Outside, the formal gardens overlook the richly planted valley garden below, with medieval dovecote, stewpond and Victorian summer house, and 18th-century tower above. At the Quay there are interesting old buildings housing an art and craft gallery. The Quay also contains an outstation of the National Maritime Museum which includes considerable interpretative display on the local area's mining heritage. The restored Tamar sailing barge *Shamrock* is moored alongside. A network of footpaths throughout the estate provides a variety of riverside and woodland walks with a high nature conservation and industrial archaeology interest.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
6	Apr-Oct 6 days Garden all year	●	£6.60	●	●	●	●	●	●	86000

**29. Tavistock Museum (Town Council/Local History Society).** Small local history museum with subsidiary themes on mining and canal history i.e. small exhibit of

mining equipment, photographs, minerals and exhibits relating to Tavistock Canal. Opened August 2003. 850 visitors to date. Open all year, three days a week. Free entry.

**Visitor facilities just outside the Area**

**Callington Museum.** This has interpretative displays on the area’s mining heritage, focusing on Kit Hill.

Site	Seasonal opening	CATA member	Admission (adult)	Education service	Countryside access/views	Parking	Catering	Toilets	Retail	Visitor No.s 2003
	Open Fri, Sat & Sun mid Apr – end Oct		Free						●	

## APPENDIX II: ATTRACTIONS, OUTDOOR SITE INTERPRETATION, SELF-GUIDED WALKS, PUBLICATIONS

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### Mining Heritage Visitor Attractions & Public Archives

Attraction / Archive	Operator	Themes	Status	WHS Bid Area
Blue Hills Tin Stream Works	Colin and Mark Wills	Water-powered tin dressing	Existing	St Agnes Mining District
Botallack Count House Workshop	The National Trust	Local mining, ecology	Existing	St Just Mining District
Callington Museum	Callington Local History Group	Local history museum	Existing	
Camborne Museum	Camborne Town Council	Local history museum	Existing	Camborne and Redruth Mining District
Charlestown Shipwreck & Heritage Centre	Private	Mining port, maritime	Existing	The Luxulyan Valley and Charlestown
Cornwall Centre - Cornish Studies Library	Cornwall County Council	Mining history, Local Studies Library and similar resources	Existing	Camborne and Redruth Mining District
Cornwall Record Office	Cornwall County Council	Mining, local history	Existing	
Cornwall's Industrial Discovery Centre, Cornish Mines & Engines	Trevithick Trust	Mining, engineering	Existing	Camborne and Redruth Mining District
Cotehele Quay	The National Trust	Tamar Valley history, including mining	Existing	Tamar Valley Mining District with Tavistock
Geevor Tin Mine	Pendeen Community Heritage	Mining, and tin dressing	Existing	St Just Mining District

<b>Attraction / Archive</b>	<b>Operator</b>	<b>Themes</b>	<b>Status</b>	<b>WHS Bid Area</b>
George and Charlotte Mine	Morwellham and Tamar Valley Trust	Underground tram trip to mine	Existing	Tamar Valley Mining District with Tavistock
Godolphin House and Garden	Private	Mine owner's house, social history of mining	Existing	Tregonning and Gwinear Mining Districts with Trewavas
Gwennap Pit and Gwennap Pit Visitor Centre	Methodist Church	Methodist preaching pit and associated small visitor centre	Existing	Gwennap Mining District with Devoran and Perran and Kennall Vale
Harvey's Foundry Phase 3	Penwith District Council	Engineering, history of Hayle, social history	Proposed	The Port of Hayle
Helston Folk Museum	Kerrier District Council	Folk museum, including mining	Existing	
King Edward Mine	Trevithick Trust	Mining, ore dressing	Existing	Camborne and Redruth Mining District
Levant Steam Engine	The National Trust	Conserved steam engine, History of Levant Mine	Existing	St Just Mining District
Liskeard Town Museum	Liskeard Town Council	Small local history museum	Existing	
Minions Heritage Centre, Houseman's engine house	Caradon District Council	Local themes including mining	Existing	Caradon Mining District
Morwellham Quay	Morwellham and Tamar Valley Trust	Recreated Victorian mining port	Existing	Tamar Valley Mining District with Tavistock
Murdoch House	Independent	William Murdoch, social history of mining	Proposed	Camborne and Redruth Mining District
Penlee House Art Gallery & Museum	Penzance Town Council	Photographic archive	Existing	
Perran Foundry	Private	Engineering	Proposed	Gwennap Mining District with Devoran and Perran and Kennall Vale

<b>Attraction / Archive</b>	<b>Operator</b>	<b>Themes</b>	<b>Status</b>	<b>WHS Bid Area</b>
Poldark Mine & Heritage Complex	Private	Underground access, mining	Existing	Wendron Mining District
Redruth Museum	Old Cornwall Society	History of Redruth and District	Existing	Camborne and Redruth Mining District
Robinson's Shaft	Kerrier District Council / The National Trust	Mining, social history	Proposed	Camborne and Redruth Mining District
Rosevale Mine	Private	Underground access to small conserved mine	Existing	
Royal Cornwall Museum	Royal Institution of Cornwall	Cornish mineral collection, Cornish history including mining	Existing	
South Crofty Mine	Baseresult Holdings Ltd	Underground tour of Cook's Kitchen mine sett	Existing	Camborne and Redruth Mining District (part)
St Agnes Museum	St. Agnes Museum Trust	Local history museum, including mining	Existing	St Agnes Mining District
St Day Church	Trevithick Trust	Mining and related social history of Gwennap area	Existing	Gwennap Mining District with Devoran and Perran and Kennall Vale
Tamar Valley Visitor Centre	Tamar Valley AONB Service	Mining, what to see and do	Proposed	Tamar Valley Mining District with Tavistock
Tavistock Museum, Mining gallery	Tavistock Town Council	Proposed adjunct to museum to cover local mining	Proposed	Tamar Valley Mining District with Tavistock
Tolgus Tin	Trevithick Trust	Water-powered tin dressing works	Existing	
Trevarno Estate & Gardens	Private	Country house associated with William Bickford	Existing	Tregonning and Gwinear Mining Districts with Trewavas
Trevithick's Cottage	Trevithick Trust	Childhood home of Richard Trevithick	Existing	

Attraction / Archive	Operator	Themes	Status	WHS Bid Area
Waterfront Inn, Portreath	Private	Portreath and its tramroads	Existing	
Wayside Folk Museum, Zennor	Private	Local history and folklore	Existing	

### Self Guided Circular Walks Featuring Mining Heritage Interpretation

Site name/Route	Author, Title, Publisher, Date of Publication	Status	WHS Bid Area	Category
Botallack to Bosweden	K. Brown & B. Acton, Exploring Cornish Mines Vol. 1, Landfall Publications, 3rd edition, 2002	In print	St Just Mining District	Book
Carn Galver Walk	West Penwith: St Ives to Pendeen, Coast of Cornwall No. 10, The National Trust, 2nd edition, 1999	In print	St Just Mining District	Booklet
Ding Dong Mine	K. Brown & B. Acton, Exploring Cornish Mines Vol. 2, Landfall Publications, 2nd edition, 2000	In print	St Just Mining District	Book
Geevor & Levant	K. Brown & B. Acton, Exploring Cornish Mines Vol. 3, Landfall Publications, 1997	In print	St Just Mining District	Book
St Just United & Cape Cornwall	K. Brown & B. Acton, Exploring Cornish Mines Vol. 5, Landfall Publications, 2001	In print	St Just Mining District	Book
Harvey's Foundry Millponds, Hayle	The Millponds of Hayle, Cornwall County Council, 2002	In print	The Port of Hayle	Free leaflet
Ashton & Germoe	Six Walks Through the Ancient Parishes of Breage and Germoe, Kerrier District Council, 2002	In print	Tregonning and Gwinear Mining Districts with Trewavas	Book
Breage & Carleen	Six Walks Through the Ancient Parishes of Breage and Germoe, Kerrier District Council, 2002	In print	Tregonning and Gwinear Mining Districts with Trewavas	Book

<b>Site name/Route</b>	<b>Author, Title, Publisher, Date of Publication</b>	<b>Status</b>	<b>WHS Bid Area</b>	<b>Category</b>
Godolphin Estate Walks	L. Luck, Godolphin Estate, The National Trust, 2003	In print	Tregonning and Gwinear Mining Districts with Trewavas	Booklet
Godolphin Warren	Six Walks Through the Ancient Parishes of Breage and Germoe, Kerrier District Council, 2002	In print	Tregonning and Gwinear Mining Districts with Trewavas	Book
Rinsey Cove (Trewavas Cliff)	Six Walks Through the Ancient Parishes of Breage and Germoe, Kerrier District Council, 2002	In print	Tregonning and Gwinear Mining Districts with Trewavas	Book
Tregonning Hill	Six Walks Through the Ancient Parishes of Breage and Germoe, Kerrier District Council, 2002	In print	Tregonning and Gwinear Mining Districts with Trewavas	Book
Wheal Prosper & Wheal Trewavas	K. Brown & B. Acton, Exploring Cornish Mines Vol. 2, Landfall Publications, 2nd edition, 2000	In print	Tregonning and Gwinear Mining Districts with Trewavas	Book
Wheal Vor, Wheal Fortune & Wheal Metal	K. Brown & B. Acton, Exploring Cornish Mines Vol. 4, Landfall Publications, 1999	In print	Tregonning and Gwinear Mining Districts with Trewavas	Book
Mines of Wendron Parish	K. Brown & B. Acton, Exploring Cornish Mines Vol. 3, Landfall Publications, 1997	In print	Wendron Mining District	Book
Carn Brea Mines & East Pool	K. Brown & B. Acton, Exploring Cornish Mines Vol. 2, Landfall Publications, 2nd edition, 2000	In print	Camborne and Redruth Mining District	Book
Great Flat Lode Trail	Great Flat Lode Trail, Cornwall County Council, 2001	In print	Camborne and Redruth Mining District	Free leaflet
Great Flat Lode Trail, and 10 circular walks	B. Acton, Exploring Cornwall's Tramway Trails, Vol. 1, Landfall Publications, 2nd edition, 2000	In print	Camborne and Redruth Mining District	Book
The Grenvilles & Condurrows	K. Brown & B. Acton, Exploring Cornish Mines Vol. 2, Landfall Publications, 2nd edition, 2000	In print	Camborne and Redruth Mining District	Book

<b>Site name/Route</b>	<b>Author, Title, Publisher, Date of Publication</b>	<b>Status</b>	<b>WHS Bid Area</b>	<b>Category</b>
Redruth Churchtown Trail	Redruth Churchtown Trail, Redruth Regeneration Project, 2000	In print	Camborne and Redruth Mining District	Free leaflet
Redruth Plain-an-Gwarry Trail	Redruth Plain-an-Gwarry Trail, Redruth Regeneration Project, 2000	In print	Camborne and Redruth Mining District	Free leaflet
Redruth Town Trail	Redruth Town Trail, Redruth Regeneration Project, 2000	In print	Camborne and Redruth Mining District	Free leaflet
Tincroft & Cook's Kitchen	K. Brown & B. Acton, Exploring Cornish Mines Vol. 2, Landfall Publications, 2nd edition, 2000	In print	Camborne and Redruth Mining District	Book
Wheal Peevor	K. Brown & B. Acton, Exploring Cornish Mines Vol. 5, Landfall Publications, 2001	In print	Camborne and Redruth Mining District	Book
Carharrack Village Trail	The Mining Villages: Gwennap Mining Area, Kerrier District Council, 2001	In print	Gwennap Mining District with Devoran, Perran and Kennall Vale	Book
Coast-to-Coast Trail	Coast-to-Coast Trail, Cornwall County Council, 2001	In print	Gwennap Mining District with Devoran, Perran and Kennall Vale	Free leaflet
Coast-to-Coast Trail, and 15 circular walks	B. Acton, Exploring Cornwall's Tramway Trails, Vol. 2, Landfall Publications, 2nd edition, 2000	In print	Gwennap Mining District with Devoran, Perran and Kennall Vale	Book
Consolidated & United Mines	K. Brown & B. Acton, Exploring Cornish Mines Vol. 1, Landfall Publications, 3rd edition, 2002	In print	Gwennap Mining District with Devoran, Perran and Kennall Vale	Book

<b>Site name/Route</b>	<b>Author, Title, Publisher, Date of Publication</b>	<b>Status</b>	<b>WHS Bid Area</b>	<b>Category</b>
St Day Town Trail and Outer Trail	The Mining Villages: Gwennap Mining Area, Kerrier District Council, 2001	In print	Gwennap Mining District with Devoran, Perran and Kennall Vale	Book
Wheal Busy, Killifreth & Wheal Unity Wood	K. Brown & B. Acton, Exploring Cornish Mines Vol. 2, Landfall Publications, 2nd edition, 2000	In print	Gwennap Mining District with Devoran, Perran and Kennall Vale	Book
St Agnes, Porthtowan and Perranporth areas	B. Acton, Around St Agnes & Perranporth, Landfall Walks Books No. 2, Landfall Publications, 1994	In print	St Agnes Mining District	Book
Trevaunance Mines & former mining port	The Trevaunance Trail, Cornwall County Council, 1998	In print	St Agnes Mining District	Free leaflet
West Kitty, Polberro & Trevaunance Mines	K. Brown & B. Acton, Exploring Cornish Mines Vol. 3, Landfall Publications, 1997	In print	St Agnes Mining District	Book
Wheal Coates & the Charlottes	K. Brown & B. Acton, Exploring Cornish Mines Vol. 4, Landfall Publications, 1999	In print	St Agnes Mining District	Book
Luxulyan Valley	The Luxulyan Valley, The Friends of Luxulyan Valley, 2001	In print	The Luxulyan Valley and Charlestown	Book
Caradon Moor	P. Stanier, The Minions Moor, The St Ives Printing & Publishing Company, 2nd edition, 1996	In print	Caradon Mining District	Book
Craddock Moor	P. Stanier, The Minions Moor, The St Ives Printing & Publishing Company, 2nd edition, 1996	In print	Caradon Mining District	Book
Cheesewring Moor	P. Stanier, The Minions Moor, The St Ives Printing & Publishing Company, 2nd edition, 1996	In print	Caradon Mining District	Book
The Phoenix Mines	K. Brown & B. Acton, Exploring Cornish Mines Vol. 4, Landfall Publications, 1999	In print	Caradon Mining District	Book
South & East Caradon Mines	K. Brown & B. Acton, Exploring Cornish Mines Vol. 3, Landfall Publications, 1997	In print	Caradon Mining District	Book

Site name/Route	Author, Title, Publisher, Date of Publication	Status	WHS Bid Area	Category
Wheal Jenkin & Marke Valley Mine	K. Brown & B. Acton, Exploring Cornish Mines Vol. 3, Landfall Publications, 1997	In print	Caradon Mining District	Book
The Mines of Lockett Village	K. Brown & B. Acton, Exploring Cornish Mines Vol. 5, Landfall Publications, 2001	In print	Tamar Valley Mining District with Tavistock	Book
The Danescombe Valley	L. Luck, Cotehele Estate, The National Trust, 1994	In print	Tamar Valley Mining District with Tavistock	Booklet
Okel Tor Mine	K. Brown & B. Acton, Exploring Cornish Mines Vol. 5, Landfall Publications, 2001	In print	Tamar Valley Mining District with Tavistock	Book
Morwellham Quay	Morwellham Quay Trail Guide, Morwellham & Tamar Valley Trust, undated	In print	Tamar Valley Mining District with Tavistock	Booklet

*Note: This is a sample of interpretative publications in print which together embrace self-guided walks in each of the WHS Bid areas.*

## Outdoor Site Interpretation Panels

Site	Owner	Category	Status
Great Work Mine	The National Trust	Mine site	Existing
Godolphin Estate	The National Trust	Mining	Existing
Dolcoath Mine, Williams Shaft	Kerrier District Council	Mine site	Existing
Old Cowlin's Mill	Kerrier District Council	Mining, railway, Great Flat Lode area	Existing
South Wheal Frances	Kerrier District Council	Mine site, engine houses, miners' dry	Existing
Wheal Basset Stamps	Kerrier District Council	Stamps for crushing tin, vanner house and tin dressing	Existing
Seleggan Tin Smelting Works	Kerrier District Council	Tin smelting works	Existing
Portreath	Cornwall County Council	Mining port, Portreath tramroad, mineral railway, inclined plane	Existing
Wheal Rose	Cornwall County Council	Mining, social history, Portreath tramroad	Existing

<b>Site</b>	<b>Owner</b>	<b>Category</b>	<b>Status</b>
Unity Wood	Cornwall County Council	Mine site, Unity safety fuse works	Existing
Wheal Busy	Cornwall County Council	Mine site, the Hornblowers	Existing
Poldice Valley	Cornwall County Council	Mine site, arsenic works, County Adit	Existing
Twelveheads	Cornwall County Council	Mining, tin stamps, County Adit	Existing
Bissoe	Cornwall County Council	Wheal Jane, arsenic works, tin dressing	Existing
Carnon Viaduct	Cornwall County Council	Mining, tin streaming	Existing
Devoran	Cornwall County Council	Mining port, mineral railway	Existing
Kennall Vale	Cornwall Wildlife Trust	Gunpowder works	Existing
Wheal Coates	The National Trust	Mine site	Existing
Luxulyan Valley	Cornwall County Council / Restormel Borough Council	Tramroads, including viaduct, inclined plane, wheelpit, leats	Existing
Minions	Caradon District Council	Mine sites	Existing
Drakewalls Mine	Cornwall County Council	Mine site	Existing
Gunnislake Clitters Mine	Cornwall County Council	Mine site	Existing
Okel Tor Mine	Cornwall County Council	Mine Site	Existing
Cotehele Estate	The National Trust	Cotehele Quay (mining port)	Existing
Morwellham Quay	Morwellham and Tamar Valley Trust	Mining port	Existing

## APPENDIX III: INDUSTRIAL & MINING- RELATED WORLD HERITAGE SITES

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### Industrial World Heritage Sites

The Cornwall and West Devon Mining Landscape WHS bid is on the UK Government's Tentative List for inscription as an industrial heritage WHS.

Of the 754 sites on the World Heritage List, there are currently 33 that are industrial heritage sites<sup>3</sup>. The first such site to be included on the list was the Wieliczka Salt Mine in Poland in 1978. The table below provides the full list of sites.

Table 1 World Heritage Sites inscribed on the World Heritage List for their 'industrial heritage' value.

Country	Site Description	Year of inscription
Austria	Hallstatt-Dachstein Salzkammergut Cultural Landscape	1997
	Semmering Railway	1998
Belgium	The Four Lifts on the Canal du Centre and their Environs, La Louvière and Le Roeulx (Hainault)	1998
	The Neolithic Flint Mines at Spiennes (Mons)	2000
Bolivia	City of Potosi	1987
Brazil	Historic Town of Ouro Preto	1980
China	Mount Qincheng and the Dujiangyan Irrigation System	2000
Czech Republic	Kutná Hora: Historical Town Centre with the Church of St Barbara and the Cathedral of Our Lady at Sedlec	1995
Finland	Verla Groundwood and Board Mill	1996
France	Royal Saltworks of Arc-et-Senans	1982
	Pont du Gard (Roman Aqueduct)	1985
	Canal du Midi	1996
Germany	Mines of Rammelsberg and Historic Town of Goslar	1992
	Völklingen Ironworks	1994
	Zollverein Coal Mine Industrial Complex in Essen	2001
India	Darjeeling Himalayan Railway	1999
Italy	Crespi d'Adda	1995
Mexico	Historic Town of Guanajuato and Adjacent Mines	1988
	Historic Centre of Zacatecas	1993
Netherlands	Mill Network at Kinderdijk-Elshout	1997
	Ir.D.F. Woudagemaal (D.F. Wouda Steam Pumping Station)	1998
Norway	Røros	1980
Poland	Wieliczka Salt Mine	1978
Slovakia	Banska Stiavnica	1993
Spain	Old Town of Segovia and its Aqueduct	1985
	Las Médulas	1997
Sweden	Engelsberg Ironworks	1993

<sup>3</sup> UNESCO website

Country	Site Description	Year of inscription
	Mining Area of the Great Copper Mountain in Falun	2001
UK	Ironbridge Gorge	1986
	Blaenavon Industrial Landscape	2000
	New Lanark	2001
	Saltaire	2001
	Derwent Valley Mills	2001

Source: UNESCO.

As the table above shows, Britain is home to 5 industrial heritage WH sites – New Lanark, Ironbridge, Saltaire, Blaenavon Industrial Landscape and Derwent Valley Mills.

## Mining-related World Heritage Sites

The World Heritage Site list contains 10 sites that have direct or indirect links to the mining industries. These are either mine sites or places that have developed as a result of their proximity to mines or from the profits derived from mining. The sites represent a broad spectrum of mining activities and commodities, from coal and salt to gold and silver. It is perhaps best to compare Cornwall's bid with other mining sites

### Descriptions of Mining-related World Heritage Sites

#### Neolithic Flint Mines at Spiennes (Mons) (Belgium, 2000)

The Neolithic flint mines at Spiennes, covering more than 100 ha, are the largest and earliest concentration of ancient mines in Europe. They are also remarkable for the diversity of technological solutions used for extraction and for the fact that they are directly linked to a settlement of the same period

#### Historic Town of Ouro Preto (Brazil, 1980)

Founded at the end of the 17th century, Ouro Preto (Black Gold) was the focal point of the gold rush and Brazil's golden age in the 18th century. With the exhaustion of the gold mines in the 19th century, the city's influence declined but many churches, bridges and fountains remain as a testimony to its past prosperity and the exceptional talent of the Baroque sculptor Aleijadinho

#### Kutná Hora : the Historical Town Centre with the Church of St Barbara and the Cathedral of Our Lady at Sedlec (Czech Republic, 1995)

Kutná Hora developed as a result of the exploitation of the silver mines. In the 14th century it became a royal city endowed with monuments that symbolized its prosperity. The Church of St Barbara, a jewel of the late Gothic period, and the Cathedral of Our Lady at Sedlec, which was restored in line with the Baroque taste of the early 18th century, were to influence the architecture of central Europe. These masterpieces today form part of a well-preserved medieval urban fabric with some particularly fine private dwellings.

### Mines of Rammelsberg and Historic Town of Goslar (Germany, 1992)

Situated near the Rammelsberg mines, Goslar held an important place in the Hanseatic League because of the rich Rammelsberg metallic ore deposits. From the 10th to the 12th century it was one of the seats of the Holy Roman Empire of the German Nation. Its well-preserved medieval historic centre has some 1,500 half-timbered houses dating from the 15th to the 19th century.

### The Zollverein Coal Mine Industrial Complex in Essen (Germany, 2001)

The Zollverein industrial landscape in Land Nordrhein-Westfalen consists of the complete infrastructure of a historical coal-mining site, with some 20th-century buildings of outstanding architectural merit. It constitutes remarkable material evidence of the evolution and decline of an essential industry over the past 150 years.

### Historic Town of Guanajuato and Adjacent Mines (Mexico, 1988)

Founded by the Spanish in the early 16th century, Guanajuato became the world's leading silver-extraction centre in the 18th century. This past can be seen in its 'subterranean streets' and the 'Boca del Infierno', a mineshaft that plunges a breathtaking 600 m. The town's fine Baroque and neoclassical buildings, resulting from the prosperity of the mines, have influenced buildings throughout central Mexico. The churches of La Compañía and La Valenciana are considered to be among the most beautiful examples of Baroque architecture in Central and South America. Guanajuato was also witness to events which changed the history of the country.

### Røros (Norway, 1980)

The history of Røros, which stands in a mountainous setting, is linked to the copper mines: they were developed in the 17th century and exploited for 333 years until 1977. Completely rebuilt after its destruction by Swedish troops in 1679, the city has some 80 wooden houses, most of them standing around courtyards. Many retain their dark pitch-log facades, giving the town a medieval appearance.

### Wieliczka Salt Mine (Poland, 1978)

This deposit of rock salt in Wieliczka-Bochnia has been mined since the 13th century. Spread over nine levels, it has 300 km of galleries with works of art, altars, and statues sculpted in the salt, making a fascinating pilgrimage into the past of a major industrial undertaking.

### Ironbridge Gorge (England, 1986)

Ironbridge is known throughout the world as the symbol of the Industrial Revolution. It contains all the elements of progress that contributed to the rapid development of this industrial region in the 18th century, from the mines themselves to the railway lines. Nearby, the blast furnace of Coalbrookdale, built in 1708, is a reminder of the discovery of coke. The bridge at Ironbridge, the world's first bridge constructed of iron, had a considerable influence on developments in the fields of technology and architecture.

### Blaenavon Industrial Landscape (Wales, 2000)

The area around Blaenavon is evidence of the pre-eminence of South Wales as the world's major producer of iron and coal in the 19th century. All the necessary elements can still be seen - coal and ore mines, quarries, a primitive railway system, furnaces, workers' homes, and the social infrastructure of their community.

## **APPENDIX IV: MARKET SEGMENT PROFILES**

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The following section presents a detailed assessment of a number of market segments.

The segments are grouped according to the method used to segment the market. Four broad categories are used, a summary of each appears below.

- Usage segmentation refers to the frequency, regularity or type of usage (e.g. day visitors, long holidays)
- Socio- demographic segmentation is widely used as demographics are easily measured and classified. This is segmentation based on income, race, age, nationality, religion, gender, education, etc.
- Psychographic segments are based on aspects such as attitudes, interests and motivations.
- Activities (e.g. shopping, outdoor activities, nightlife, events)

### **Usage-based market segments**

#### **Day visitors**

Day visits is a huge and diverse market and one that is quite difficult to define. It includes leisure visits from home of more than 3 hours not taken on a regular basis but some tourism statistics also include visits made by staying visits made to neighbouring areas.

National estimates of the market are derived from the UK Day Visits Survey. The latest available figures relate to 1998 and show that there were some 6 billion leisure day trips made in the UK with an associated spend of £71bn. In its *enjoyEngland* strategy<sup>4</sup>, VisitBritain estimates that day visits represent 60% of total visitor spend in England. Other aspects of the market identified in the same report include:

- The segment is important in generating seasonal spread
- The majority of day visits are in, or to, towns and cities (72%)
- The countryside is the next most visited location (22%) where walking is the most popular activity

Estimating the market size for Cornwall and West Devon is difficult due to lack of data but we know that the South West region had 148 million day trips in 2001<sup>5</sup>. The segment is also very important for attractions in the region- 1/2 of all visits to tourist attractions are made by day visitors or locals.

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<sup>4</sup> *enjoyEngland: The Strategy, England Domestic Tourism Marketing 2003/4 to 2005/6*, England Marketing Advisory Board, Sept 2003

<sup>5</sup> State of Tourism South West, The Tourism Company (commissioned by South West Tourism), July 2003

The local market information that is available suggests that day visitors make up only a small percentage of visits (around 2%) but may echo national trends and be more important for urban centres in the area and for certain attractions. Specific findings drawn from local surveys include:

- 2.2% of visits in Cornwall are day trips from home<sup>6</sup>
- 67% of visitors to Falmouth were day visitors. Of these 6% were locals and 61% visiting for the day from nearby holiday bases outside Falmouth<sup>7</sup>
- 30% of visitors to attractions in the Tamar Valley were day visitors<sup>8</sup>

Evidence of the importance of locals undertaking day visits to certain attractions in the area is available in a couple of cases. For instance, it was found that 67% of users of the Mineral Tramways (a series of multi-user trails that follow the route of old mineral railways) were locals<sup>9</sup>. Cornwall residents' use of the South West Coast Path is estimated to be worth about £27m annually.

It is unclear from the figures above whether the lower than average numbers of day visitors drawn from the local population in Cornwall suggest there is growth potential in this market. An alternative interpretation is that the finding backs up the comment made in the recent State of South West Tourism report which stated that

*“Cornwall and Devon are too far from centres of population to do well from the day visitor market.”*

### **Domestic long holidays**

These are UK residents taking holidays in the UK of 7 nights or more.

National statistics relating to this segment use a slightly different definition of long holidays. They see long holidays as being made up of two lengths of holiday – those of 4-7 nights duration and those of 8 or more nights. The figures show that long holidays of between 4 and 7 nights accounts for 46m trips (20% of all trips) whilst holidays of 8 or more nights account for 30m trips (13% of all trips)<sup>10</sup>.

The segment accounts for 24% of all holiday trips in the South West but is even more important in Cornwall where it accounts for double that amount (48%). In terms of nights and spend its impact is even greater, accounting for 70% and 66% respectively.

The long holiday market is the mainstay of Cornwall and West Devon during the peak season, but its importance is likely to decline over time. Market forces such as the continued increase in holidays taken abroad means that over time the sector will become less important. Looking at long holidays by lifestage it is the post-family long holiday market that shows most potential for growth out of season.

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6 Cornwall Visitor Survey 2002 – 2003, Cornwall Tourist Board

7 Falmouth Visitor Survey, 2002, Carrick District Council

8 World Heritage Site - Tamar Valley Visitor Survey (Cornwall Visitor Survey) May – Oct 2003, Cornwall Tourist Board, 2003

9 Economic Impact of the Mineral Tramways, 1996, quoted in Cornish Mining World Heritage Site Bid Economic Assessment, Atlantic Consultants, June 2003

10 The UK Tourist, VisitBritain, June 2003

## **Domestic short breaks**

For the purposes of this strategy we define short breaks as UK residents staying away from home on holidays of 1-6 nights. This is based upon research conducted for South West Tourism<sup>11</sup> that indicated that people considered any holiday of less than a week as a break.

At a UK level, this segment generated 84m holiday trips and with spend of £12bn. The segment is the most important type of holiday, responsible for 83% of all holiday trips and 71% of all holiday spending.

In the South West, 12.8m short breaks were taken in 2001, generating spend of £1.9bn. Short breaks, as a percentage of total holiday trips, are at a lower level in the South West than is the case nationally. For instance, short breaks make up 76% of all holiday trips and 63% of spend. Forecast for the sector in the South West suggest that 1-3 night holidays will increase by 58% in the period 2001 – 2006 whilst 4-6 night holidays are also expected to increase, although not at such a fast rate.

Key characteristics of this segment include:

- Two thirds of breaks are taken by those without children
- 62% are ABC1 making its profile slightly more upmarket than holidays
- Average length of stay is 2.9 nights
- 25% come from South West, 45% from London, West Midlands and South East
- 41% stay at seaside, 33% in urban centres and 26% in countryside
- Short break takers are strongly motivated by discounts and special offers although there is also scope for development of niche products aimed at higher spenders
- Short break takers like a good range of places to visit and wide choice
- Breaks are booked with short lead times and are often spontaneous. This is particularly the case where children are not included in the group
- Cornwall is less likely than other parts of the SW to benefit from this segment, particularly for short 2/3 night breaks

## **Visiting friends and relatives**

This segment is defined as residents of the UK staying overnight where their prime reason for visiting is to spend time with friends and relatives (VFR).

At a national level, VisitBritain sees the market as displaying significant growth, attributed in part by more people undertaking higher education away from home. They also see VFR as a way of spreading tourism across the country, encouraging visitors to see parts of England that they might not otherwise visit, and also occur more evenly across the year than holiday trips.

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<sup>11</sup> see ref 5

Locally, estimates for the importance of the VFR segment range from between 11%<sup>12</sup> and 21%<sup>13</sup> of tourism trips in Cornwall. Forecasted growth in the South West is expected to be in the order of 71% between 2001 and 2011<sup>14</sup>.

Amongst the characteristics of this segment are:

- Low spend due to use of relative's / friends' accommodation (9%) but statistics do not count spending undertaken by the host. Estimates suggest this could double the spend figures.
- Even spread of trip across year but with a peak at Christmas
- Looking for interesting places to visit. Hosts will often search out less congested areas and places off the beaten track in order to get an insider's view.
- The majority of VFR are from ABC1 socio-economic groups
- Fairly evenly spread across the age groups but some skew towards younger age groups

### **Overseas visitors**

The selection of target markets for overseas visitors featured here reflect the priority markets identified for DACOM, the main body involved in overseas marketing in the area.

The reason for this approach is that the large budgets required to communicate with non-domestic markets and the relatively small amounts of money available to individual organisations means collaborative working is highly desirable. It therefore makes sense to align potential overseas work with the priorities of those already actively engaged in overseas promotion. The one exception to this approach is the section devoted to ancestral tourism. This potential market is identified as a niche overseas market that has direct relevance to the nature of the WHS bid and is therefore treated as a special case to assess in detail.

In terms of overall importance, Cornwall and Devon attract relatively low numbers of overseas visitors. In 2002, approximately 4% of visitors to Cornwall and 6% of Devon visitors were from overseas. This compares with a regional average of 7% for the South West. The segment is more important in terms of spend than trips with overseas visitors to Cornwall generating 5% of total spend and 9% in Devon.

The USA is the largest market (17% of all overseas visits), followed by France (15%), Germany (12%) Ireland (8%) and Australia (7%). A brief assessment of the interests and characteristics of each market is listed below

#### *USA*

- Single biggest market for the SW (17% of all overseas visits)
- The population of the USA is 280m and 18% of adults hold passports.

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<sup>12</sup> see ref 6

<sup>13</sup> see ref 5

<sup>14</sup> see ref 5

- Highly seasonal due to limited holidays in the US
- Around half of US travellers visiting Britain are over 45.
- History, heritage, arts and culture are major motivators
- Searching for quaint villages and an 'English' experience
- Have poor level of knowledge of the UK
- The downturn in travel from the US following the terrorist attacks on September 2001 is still evident in current visitor patterns but the medium and long term prospects appear good with a 33% increase predicted between 2001 and 2011.<sup>15</sup>

#### *France*

- Accounts for 15% of overseas visitors to the South West.
- Strength of the Euro has had an impact on this market with UK visits by the French down by 25% on 1996 figures. However SW appears resilient with static figures during this same period.
- Cornwall and the SW are better placed than many UK regions due to the proximity of ports of entry and ferry services.
- Keen on cultural activities, visiting heritage sites. museums and historic houses
- Older groups are looking for soft adventure, activities, culture and heritage. They have an interest in countryside and touring.
- Forecasts predict a 29% increase in the period 2001 to 2011

#### *Germany*

- Accounts for 12% of SW overseas visits
- Visits to the UK fell by 50% and to the SW by 30% between 1996 and 2001
- Expansion in the market dependent on airports (2/3 come by air)
- 61% come in the 6 summer months
- Green issues are important for this market
- Interested in scenery and striking landscape
- A survey of German ecotourists<sup>16</sup> indicated that ½ wanted to walk as part of their holiday and wanted good quality information

#### *Ireland*

- Accounts for 8% of overseas visits to the SW

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<sup>15</sup> see ref 5

<sup>16</sup> Using Cultural and Natural Heritage to Develop Sustainable Tourism, World Tourism Organisation

- Strong historic and social links with the UK
- VFR makes up 1/3 of trips to UK
- Enjoy informal and friendly atmosphere
- Drawn by countryside and coast
- Ancestral tourism may offer opportunities

#### *Australia*

- Accounts for 7% of visits to the South West
- Average length of stay is 9 days
- Many Australians have strong family links with UK (40% are VFR)
- Older market interested in heritage and cultural interest, younger market looking for budget accommodation and active holidays and good nightlife

### **Education groups**

Consultation carried out in the preparation of this plan highlighted the need to divide the broad education market in order to allow better targeting. Three main markets were highlighted:

- Higher and further education groups
- Primary / secondary schools
- Lifelong learning

It is thought useful to further divide the market into day visits and residential visits. The two markets are roughly the same size in terms of number of trips, but the associated spend with regard to residential visits is likely to be larger than for day visits.

#### Higher and further education

These are day visits and residential visits organised by colleges and universities. In a national survey into school trips<sup>17</sup>, Cornwall accounts for 3% of all higher education residential trips whilst Devon accounts for 13%. Devon is also the destination for 11% of residential further education trips with Cornwall not featuring in this market as a major destination.

In terms of residential visits, both the further and higher education markets are relatively loyal to tried and tested locations. The most preferred accommodation type amongst higher education groups are hotels whilst further education groups favour study field centres and youth hostels.

The availability and cost of group accommodation, the natural resources of the location, the cost of travel to the destination and the availability of special deals are of the highest importance.

<sup>17</sup> *Education Market Assessment*, Isle of Wight Tourism, 1998

The day market is made up establishments more local to the area and it is apparent that the low overall population in the area means that numbers of local further and higher education establishments will not be as high as areas with higher populations.

### Primary and secondary school groups

Primary schools organise more day visits than secondary schools. Primary schools are also much more likely to organise a day visit than a residential one. The National Foundation for Education Research<sup>18</sup> suggests that:

- Primary schools organise an average of 6 day trips a year compared with less than 1 residential trip. Primary schools travel an average of 28 miles for a day trip and 66 miles for a residential visit
- Secondary schools organise an average of 11 day trips per year and around 5 residential trips per year

The survey of mining related visitor attractions suggests that about 9% of their visitors are educational groups. Conversations with individual sites suggest that the bulk are from local primary and secondary schools. There is little evidence that mining heritage is currently attracting large numbers of school groups from outside the local area.

In terms of catering for an increase in this market, accommodation for school groups needs to be able to cope with large numbers of children i.e. being able to take a whole year group as opposed to small groups as this can cause havoc back at school trying to provide teacher cover. With younger children, exclusive use of accommodation is often required for safety reasons.

### Lifelong learning

In the UK Government's Green Paper *The Learning Age: a renaissance for a new Britain*, lifelong learning is defined as:

*“the continuous development of the skills, knowledge and understanding that are essential for employability and fulfilment”.*

Another definition is provided by Resource, the Council for Museums, Archives and Libraries, which defines lifelong learning as:

*“a belief in the value of learning at all stages of life, for a variety of internally and externally motivated needs”*

As one would expect, such a wide-ranging definitions this leads to a wide range of contexts in which life-long learning can take place.

It can include both structured and informal education provided by primary, secondary, further and higher institutions. It can also be provided through distance learning or more informal means. There is also a considerable overlap in this more informal

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<sup>18</sup> quoted in *The Schools Visits Market*, Insights, ETB, 1993

arena with cultural and heritage tourists whose motives include learning and education.

## **Socio-demographic segments**

The following segments are included in this section

- Family lifecycle (pre-family, family, post-family / empty nesters)
- Ancestral tourists

### **Family lifecycle**

Lifecycle segmentation combines information about age, presence of children and working status into a single segmentation factor.

The method is based on research evidence that shows that people in each lifecycle exhibit very different behavioural patterns and that this is greatly influenced by individual familial circumstances.

Family lifecycle is typically split into four main categories. These are Pre-family, Family, Empty Nesters and Post families. Similarities in behaviour patterns between Empty Nesters and Post Families means that these can effectively be treated as one group

#### Pre-family

This group consists of the under 35 year olds with no children. In terms of holidaying patterns, this group is highly likely to holiday abroad (75%).

In terms of UK holidays taken by this lifecycle segment, it is estimated that they represent 13% of the market<sup>19</sup>. In the South West, the segment accounts for a similar percentage (15%) although it is relatively more important in the short break market where it accounts for 22% of all short breaks taken. This compares with long holidays (4+ nights) where it only accounts for 6%.

Within Cornwall it is lively centres such as Torquay and Newquay which are likely to see greatest numbers from this group. The scenery, which is a draw for many visitors to Cornwall and West Devon is appreciated but not the main draw for this segment. There may be limited opportunities to develop packages within the WHS bid area around active outdoor activities such as cycling.

#### Family

The family lifecycle consists of UK families with dependent children aged under 16 taking family breaks and holidays in the UK.

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<sup>19</sup> *Pre-family holidays in the UK*, MINTEL, December 2002

Market estimates suggest that 32 million family holidays were taken in the UK in 2002, and that this generated spend of £4 bn<sup>20</sup>.

A recent report into the family market highlights some of the distinctive characteristics of family holidays<sup>21</sup>. Compared to holidays as a whole, family holidays are:

- Longer: 47% are 4+ nights as compared with 37% of all holidays
- More likely to be taken at the seaside
- More likely to be taken in the peak season: 34% are taken in July and August
- More likely to be a main than secondary holiday
- Less likely to be an activity holiday

The age of children has a bearing on holidaying behaviour so it is useful to sub-divide the segment into those with pre-school children (portable and not constrained by school holidays), those with children of primary school age and those with teenagers who are likely to be more independent and demanding.

Within the SW region, family holidays are a key market accounting for over 40% of holidays. The segment's importance is also reflected in a higher than average market share of the UK market (17%) and its position as the second most popular UK region (behind Wales) amongst this group<sup>22</sup>. Within the South West Cornwall and Devon are the most popular destinations. Forecasts predict that the family market will grow less fast than holiday-taking as a whole.

Focus group research commissioned by South West Tourism provides some insight into the perceptions of this segment towards Devon and Cornwall<sup>23</sup>.

- Too far for breaks but good for family holidays
- Plenty to do and interest the children and good scenery for the adults
- Perceived to have better weather than the rest of the UK
- The coast is a key attraction
- A good range and variety of accommodation but some concerns about quality and price.

### Post-family/ Empty Nesters

These are UK residents aged 55 and over staying overnight for 1 or more nights in UK. The segment consists of couples and singles on holiday without children.

The categorisation is broad and is broken down in the South West Tourism report<sup>24</sup> into three further sub-segments based on age/lifecycle and activity levels.

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<sup>20</sup> see ref 5

<sup>21</sup> Meet the Family- Family Holidays in the UK, Insights, BTA, 2004

<sup>22</sup> see ref 5

<sup>23</sup> *Ibid.*

<sup>24</sup> *Ibid.*

- Empty Nesters (55-65) – couples without dependent children who are still in work, are healthy and active
- Newly retired (65-75) – those with occupational pensions have the time, inclination and resources to travel
- Over 75s – ill-health and the loss of partners begin to affect holiday taking with fewer holidays taken.

The UK market is considerable, accounting for 28m holiday trips in the UK with spend of £5,274m.<sup>25</sup> This equates to 28% of all UK holiday trips in 2001.

In the South West, the post-family group took 5.6m holidays with a spend of £1 bn. This makes up 33% of holiday trips in the South West<sup>26</sup>. Long term prospects for this segment in the region look good, with forecasts indicating that the segment will grow faster than holidaytaking as a whole.

Some key characteristics of this segment include:

- They looking to take holidays and breaks outside of school holidays
- They want active breaks and enjoy attractive scenery, walking, places of interest, gardens, historic properties, towns, villages and good food.
- Serviced accommodation (e.g. hotels and guesthouses) is particularly sought after
- They see Devon and Cornwall as attractive for longer breaks and some week-long holidays
- Cornwall is considered too far for short breaks
- The area is seen as distinctive and different from home, valued for its scenic beauty and gardens

### **Ancestral tourists**

It is estimated that there may be 6 million people worldwide with Cornish ancestry.<sup>27</sup> Although it is hard to offer a precise figure, a good proportion of these may originally be descended from Cornish Miners. Part of the reason for this is the fact that up to 2/3 of the mining population of Cornwall and West Devon emigrated overseas in search of work. Whilst some will have returned, a great deal settled overseas.

The success of events such as the annual *Dehwelans* festival celebrating Cornishness and requests for family records in the area suggests that there is considerable interest in tracing Cornish ancestry. The question is, to what extent can this interest be considered a viable tourism market segment.

Since the late 1960s genealogy has become a leisure pursuit. However a more recent phenomena has been the growth of what is called ancestral or genealogical tourism. This is where a visit to a particular country / destination is motivated by a desire to trace a family connection with an area.

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<sup>25</sup> *Ibid*

<sup>26</sup> *Ibid*.

<sup>27</sup> *Morwellham Quay Emigration Centre Study*, EKOS Consulting, November 2003

Genealogical tourism is already well established in Scotland and Ireland where 79,000 people visited for this purpose<sup>28</sup>. In England it is still in its infancy. Despite this lack of development, a recent report<sup>29</sup> identified some of the benefits of this type of visitor.

- They are not necessarily attracted to major tourist centres, as it is their ancestors came from all over Britain
- They often visit archives in places which have little tourist trade
- Family history can take place at any time of the year

The economic importance of the segment is considerable. Research into ancestral tourism in Scotland<sup>30</sup> reveals:

- Visitors undertaking genealogy activities spend at least 10% more per day than the average tourist to Scotland
- Average spending by overseas ancestral tourists is £45 per day, while UK ancestral visitors spend £52
- Overall, ancestral tourists are estimated to account for just less than 2% of all holiday trips to Scotland, but almost 5% of total expenditure

Further information on the potential benefits of the market can be gained by looking at the use of archives in the UK<sup>31</sup>:

- For 87% of users, visiting the archive was their main purpose for visiting an area
- 12% of users intended to stay more than a day in the area

There is no information on the numbers of ancestral tourists at a local level but it is perhaps worth noting that the main overseas markets for Cornwall and Devon is the USA, one of the main places that Cornish Miners emigrated to. The Australian market, although only 7% of the overseas market in the South West, is another market with strong ancestral connections.

## Activity-based segments

The following activity-based segments have been selected based upon their relevance and attractiveness to the product and themes being offered by the WHS bid areas. Four main segments are identified:

- Walking
- Cycling

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<sup>28</sup> *Ancestral Tourism*, Insights, Mar 2003

<sup>29</sup> *Ibid.*

<sup>30</sup> *Ancestral Tourism in Scotland*, Ancestral Tourism Industry Group, 2003

<sup>31</sup> figures derived from *National Survey of Visitors to British Archives* (Feb 2001)

- Culture & heritage
- Mining/ industrial heritage enthusiasts

## Walking

There is a range of definitions regarding what constitutes walking in tourism terms, but one of the most widely used definitions is that it is recreational walking where the walk is the end in itself and not simply a means of getting from A to B.

In terms of market size, walking is the most popular form of activity holiday in the UK. Overall, 5% of all holiday trips have walking as their main purpose. This equates to around 5.1m trips and spend of £868m<sup>32</sup>.

As well as those for whom walking is the main purpose of a holiday, walking is also the most popular activity to undertake whilst on holiday in the UK. Four fifths of holiday-makers have walked whilst on holidays or short breaks in the last three years whilst figures from UKTS shows that 24% of trips included walking of more than 2 miles as part of the holiday.

The Cornwall Visitor Survey shows that over half of all visitors plan to do a coastal walk whilst on holiday with just under 40% looking to walk in the countryside. A survey of visitors to Falmouth<sup>33</sup> also shows the importance of walking. One fifth of respondents intended to go walking during their visit and for around a quarter of respondents the intention to walk had been a factor in their decision to visit. A survey of visitors to attractions in the WHS area<sup>34</sup> indicated that 55% were planning a coast walk whilst 41% were planning a countryside walk.

Cornwall and West Devon are fortunate to have a great many fine walks which attract a wide range of walkers. Perhaps the most high profile is the South West Coast Path (SWCP), a 630 mile National Trail which includes the Cornwall and Devon coasts. An economic impact assessment of the Path showed that a section of trail running through the Lizard Peninsula generated over £7m per year in accommodation-related tourism revenues. The same survey also found that accommodation providers estimate that over one third of their annual visitor numbers was directly attributable to the proximity of the South West Coast Path.

Walking has already been identified as the most popular activity within the VFR segment but its importance is underlined by the fact that 7.9% of walks on the South West Coast Path in Cornwall were done by VFR groups. It is estimated that this contributes around £7m direct spending per year.

In addition to the VFR market, it should not be forgotten that residents are also an important market to consider. As has already been outlined in *the Day Visitors* section, Cornwall residents are estimated to spend about £27m annually walking along the SWCP.

In terms of the profile of walkers, the following observations are considered useful:

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<sup>32</sup> see ref 5

<sup>33</sup> see ref 7

<sup>34</sup> WHS Cornwall Visitor Survey May – Oct 2003, Cornwall Enterprise, 2003

- Walking in general is significant to all ages and lifestage groups, appealing to young and old alike.
- Most walking holidays are DIY holidays, where people have arranged their own accommodation, planned their own routes and made their own travel arrangements.
- Packaged walking holidays appeal primarily to singles or couples and are most popular with the 45 – 54 age group.
- Walking (more than 2 miles) is marginally more important amongst long holiday takers (37% participate) than short holiday takers (22%), both as an activity and as a purpose of visit.
- Walking holidays are slightly less seasonal than general holidays and particularly popular in June and September.
- It is relatively up-market with two thirds of walkers from ABC1 socio-economic groups.
- Over 55s are already well disposed to walking. The 45-54 year old age bracket is also increasing in size

## Cycling

Cycling charity Sustrans defines cycle tourism as recreational visits, either overnight or day visits away from home, which involve leisure cycling as a fundamental and significant part of the visit.

A distinction needs to be made between those on holidays where the primary purpose is cycling, (i.e. cycle tourists) and where cycling is an activity on a more general type of holiday. (i.e. holiday cycling). A third category, cycling day visits, refers to people travelling from home.

Figures from UKTS show that 1m cycling holidays were taken in 2002 generating £174m. Holiday cycling accounted for 6.1m trips that generated £1,215m.

At a local level, information on the demand for cycling is limited. However, the Cornwall Visitor Survey<sup>35</sup> indicated that 5.9% of visitors were looking to cycle whilst on holiday.

Families are the main market for holiday cycling. In general, holiday cycling is likely to be undertaken by people who have not spent a great deal of their bikes. Holiday cycling is dominated by demand for traffic-free paths. Commonly used routes are disused railway lines, forest roads and rights of way such as byways or green lanes.

Other characteristics of the sub-segment<sup>36</sup> are:

- Low fitness levels
- Varying ages
- Low levels of technical ability

<sup>35</sup> see ref 6

<sup>36</sup> Draft Dyfi Valley Cycling Review, Strategy and Action Plan, 2002,2006, Ecodevfi, 2002

- Limited outdoor skills
- Want easy trails with gentle climbs and descents
- Short rides between 1 and 2 hours

Market forecasts for holiday cycling are promising. It is already a sizeable market and one that is likely to grow. Sustrans' assessment for the sector is:

- There is undoubtedly a sizeable potential market for holiday cycling which can be further developed given improved provision and promotion of suitable leisure cycling routes in holiday areas.
- Many UK holidaymakers already cycle while on holiday and there is evidence that many more would like to. There is potential to encourage UK holidaymakers to use bikes much more as their primary means of transport during their holiday (if not their means of access in the first place).

### **Culture & heritage tourists**

Cultural tourists and heritage tourists are often grouped together and it is fair to say that both share many similarities. However there are some differences in terms of the product offering and the market's response to it. For this reason the following section attempts to address the distinction between the two terms.

Heritage tourism is place-based, creating a sense of place rooted in specifics of the local land, its people and their artefacts, stories and traditions. Cultural tourism, meanwhile, embraces the same kinds of experience with less emphasis on place. It can include 'intellectual access' to artefacts, activities, ideas as well as places that authentically represent the stories and people of the past and present.<sup>37</sup>

As an example, seeing the work of a great artist in his home and studio is an example of heritage, while viewing those same works in a travelling exhibit is cultural tourism.

As the above definition shows the heritage and cultural tourism markets are very diverse and their boundaries blurred. Attractions can encompass social history, popular culture, arts, crafts and music, food and drink. They can range from large, internationally renowned sites and buildings to small museums and visitor centres, as well as historic towns and cities and elements of the natural environment.

In 2002, around 63 million visits were made to sites that could be considered to be formal historic visitor attractions in England. This represents over one quarter of all tourist visits. Of these:

- 16.5 million visits were recorded to historic houses.
- 10 million visits to gardens, many with a heritage dimension.
- 9 million to heritage/visitor centres.

<sup>37</sup> taken from article on *Group Travel Leader* (US) website (<http://www.grouptravelleader.com/roundups/6-00/cultural.html>)

In 2002, 29.5 million staying visitors to England (29% of domestic tourists) visited heritage sites (castles, monuments, churches etc) whilst 22 million (22% of domestic tourists) visited artistic/heritage exhibits.

At a local level little information on the market is available. One of the few reports is the Economic Impact Assessment<sup>38</sup> commissioned for the WHS bid which estimates that:

- 6.6% of leisure day and staying visitors considered mining heritage to be very or quite important in planning their visit.
- £52.2 million is spent by visitors who considered mining heritage to be very important with a further £64.5m generated by those considering it quite important.

A larger, more recent study conducted as part of the Cornwall Visitor Survey paints a more mixed picture of the market. For instance 1.9% of the respondents indicated that Industrial heritage and history was a reason why they chose Cornwall but 26.2% said that they would undertake some activity connected with mining heritage during their stay. The survey also asked for the importance of mining heritage in planning the visit. 5% stated it to be very important whilst 16% thought it to be fairly important. It was not important for 71% of the sample.

The picture emerging in this case is of a very small enthusiasts market but a larger market of visitors who are wanting and willing to learn more about mining heritage.

Trends in the market at a national level are promising. Visits to heritage attractions have increased by 5.8% since 2000 whilst the market looks set to enjoy continued growth due to increases in the key visiting age groups and socio-economic groups. There is also an increasing trend towards 'discerning hedonism', leading to a trend towards self-development, learning new skills, attending classes and interest in the arts. The popularity of TV programmes on topics like archaeology, restoration and history also point to a growing interest in this area.

As has been mentioned, the profile of cultural and heritage tourists is similar. Key characteristics include:

- Large percentage drawn from ABC1 socio-economic groups.
- 35-44 with children or 55 year plus empty nesters.
- Women more commonly visit performing arts and artistic/heritage exhibits than men
- Around half of all visitors to formal heritage sites are local and day visitors; a quarter to a third are domestic tourists, and the remainder overseas visitors
- A survey by the British Arts Festivals Association found that local festivals are predominantly attended by local residents, only 8% travelling further than 50 miles

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<sup>38</sup> *Cornish Mining World Heritage Site Bid Economic Impact Assessment*, Cornwall Enterprise, 2003

- England's heritage and culture are seen as key motivating factors for overseas tourists to Britain

A survey by the World Tourism Organisation<sup>39</sup> highlighted some of the prime motivators for cultural and heritage tourists:

- Physical well being and health
- Discovery, intellectual stimulation and education
- Enjoyment of unspoilt nature and beautiful scenery
- Contact with people from different backgrounds and cultures in a more
- A more personalised and intimate setting than would be found in the mass tourism destinations
- Adventure and excitement

A useful way to further segment this market is to look at it in terms of level of tourist interest in heritage / culture. At one end of the spectrum are 'enthusiasts' (dealt with in the proceeding section) whilst at the other are tourists who have no interest or are antagonistic towards heritage and culture. Culture/ Heritage tourists can be seen as members of the following three groups:

- Tourists for whom experiencing heritage, in the broadest sense of the term, is a main motivator for some of their holidays, while they take other forms of holiday at other times
- Tourists who take other types of holiday – beach, activity etc, but who will occasionally take excursions to heritage sites or events if they are famous or free
- Tourists who take day trips where the main focus of their trip is sometimes heritage based.

### **Mining / industrial heritage “enthusiasts”**

This is a very difficult market to define, but can be considered to be part of the wider heritage / cultural tourism segment. It can broadly be defined by a high level of interest in mining heritage and broken down into the following groups<sup>40</sup>.

- Tourists whose every holiday is focused on mining/ industrial heritage
- Tourists who take holidays where experiencing mining heritage / industrial heritage, in its broadest sense, is always the main purpose of every holiday they take
- Tourists for whom mining heritage/industrial heritage is the main motivation of some of their holidays; at other times they will take other types of holiday

These description clearly show that segmentation of this type is a continuum and that at less intense levels of interest, the enthusiast market merges with the wider, more

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<sup>39</sup> see ref 16

<sup>40</sup> *Heritage Tourism in the UK – A Glance at Things to Come*, Insights. , English Tourism Council, May 2002

casual interest of cultural / heritage tourists. Whilst this point or merger is not clearly defined, consultation with stakeholders in the WHS bid area suggests that differing marketing approaches to these segments may be required. For this reason heritage / cultural tourists are treated as a separate segment for the purposes of this strategy.

Looking at the 'enthusiasts' market, it is hard to come by figures that give an idea of the market size. What evidence there is suggests that this is a minority interest. For instance, UKTS shows that for 3% of UK visitors, visiting heritage sites was the main purpose of their visit. Visiting artistic or heritage exhibits was the main purpose of a holiday for 2% of visitors.<sup>41</sup> This definition of heritage and art covers a much wider range of attractions than industrial and mining heritage so it is likely that the figure for these interests would be lower.

For industrial attractions, it is clear that the enthusiasts provide a more important market than for general visits to an area. A national study of industrial heritage sites commissioned by English Heritage in 1998<sup>42</sup> suggests that enthusiasts make up an important part of the market for industrial heritage attractions. For instance enthusiasts were considered very important to 55% of industrial heritage attractions, with 26% of attractions stating them to be quite important and 19% seeing them as not important at all.

## Psychographic Segments

This segmentation method divides the market into segments based on psychographic values. This includes looking at mental processes within an individual rather than assessing some outward characteristic such as age. Examples include such aspects as motivations, outlook and attitudes.

The segments included here have recently been adopted by VisitBritain and have been the subject of further refinement for local implementation in the South West region by South West Tourism.

Eight psychographic profiles were developed to define UK holiday markets:

- *Style Hounds, Followers, Cosmopolitans, Traditionals, High Street, Habituals, Discoverers and Functionals.*

Of these eight, three are considered to be of most relevance to this Marketing Strategy in terms of their interests and motivations chiming with the main product offering contained within the WHS bid areas. These segments are *Traditionals*, *Cosmopolitans* and *Discoverers*.

### Traditionals

The *Traditionals* segment is a main-stream market whose members value good service and are willing to pay for it. They make up 12.7% of the short break markets and take more than 50% of their short breaks in England. York, the Lakes, Devon, Devon, Cornwall and the Isle of Wight are all popular options. The *Traditionals* segment are likely to enjoy visiting attractions on offer when on holiday. They prefer

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<sup>41</sup> UKTS, 2002.

<sup>42</sup> *The Market for industrial Heritage Sites*, Insights, Jan 2000

traditional attractions, museums, galleries, gardens, churches and historic sites. In the evening they enjoy visiting the theatre or arts events.

### **Cosmopolitans**

Cosmopolitans are strong, active confident individuals, who do what they want rather than follow any particular fashion. Life for this group is full and active, yet peace and relaxation is still valued in the right circumstances. They make up 21.6% of the short break market making it the most active group. For a short break, favoured options include city breaks but also more scenic locations. They are a young segment. Over 40% are aged under 35 (a quarter aged 16-25). Over a quarter of the group are pre-family, a third with family and a further 38% post family. Pre-dominantly C1 people, a quarter are from AB socio-economic groups. They enjoy activity holidays or a holiday with a theme or a chance to get 'off the beaten track'. Seeking a holiday that has a low impact on the environment is also attractive.

### **Discoverers**

Discoverers are independent of mind. They are the group least likely to be worried about what others might think. They are little influenced by style or brand unless it represents values they are seeking. They value good service, enjoy intellectual challenges but arts and culture are not really an important part of who they are. Discoverers make up 13.8% of the short break market and 11.3% of the long holiday market. This group are more likely than most to holiday off the beaten track, and express some interest in activity holidays or those with a theme. They are less likely than the norm to go to familiar destinations. They are three times more likely to stay in England for a weekend away rather than go abroad.

## **APPENDIX V: MARKETING APPROACH TO SECONDARY MARKET SEGMENTS**

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### **Mining / industrial heritage “enthusiasts”**

We know that this segment is one of the most important for the industrial heritage attractions in the area but also know that they will be drawn to the area and specific attractions due to their knowledge of what is on offer. However, whilst an area-wide campaign is not considered a priority for this group, collaborative work by individual attractions may be of some benefit.

### **Cycling**

The recommended marketing approach for cycling follows a similar pattern to that of walking. The focus should be on stimulating Holiday Cycling, i.e. those people wanting to cycle as part of their holiday. Tactics are similar to those suggested for walking but could also include:

- Promoting cycling trails.
- Working with private sector to develop cycle hire facilities near to trails/routes that pass near to mining heritage.
- Working with public transport operators to ensure cycle hire facilities are near bus / rail routes (in order to encourage alternatives to car-borne holiday cyclists).
- Signposting of mining heritage attractions and sites from existing routes.

### **Education (further and higher education)**

Development of this segment relies largely on the prevalence of certain themes within the curriculum of further and higher education establishments. Courses that have strong links with mining or Cornish studies are the most likely to visit the Bid Areas. The market locally is strong, with the Combined Universities in Cornwall Project providing a number of marketing opportunities. Further afield there needs to be a co-ordinated approach to presenting resources to leaders of courses with mining, regional studies, industrial history and extraction themes. Possible approaches are:

- Education-based website offering resources and research relating to the needs of the further and higher education sectors.
- Directory of experts / tour guides that can be called upon to host talks, walks or visits. This is particularly useful in opening up ‘intellectual access’ to the widest range of mining heritage assets and not just those that are established attractions.
- A list of mining heritage sites not open to the public but where access can be arranged for accompanied education groups.

- Link with those engaged in education marketing within the Jurassic Coast WHS in Dorset and East Devon to develop joint marketing initiatives themed around geology.
- Work actively with relevant departments at the new Combined Universities in Cornwall campus at Tremough, near Falmouth for the inclusion of mining heritage in formal and informal syllabuses.

## **Education (lifelong learning)**

The main objective should be to develop a bridge between providers of relevant informal and short courses and those engaged in tourism promotion. There may be a need to broaden the appeal of mining heritage by developing courses that have an artistic and/or practical bias.

- Work with the University of Exeter in Cornwall's Department of Life-long learning to develop appropriate short and modular courses that include industrial heritage or the artistic and social history of Cornish mining.
- Work with the Institute of Cornish Studies to develop courses and promotions that are aimed at attracting lifelong learners from inside and outside the Bid Areas.
- Develop working holiday programmes centred around landscape / mining conservation work.
- Develop practical courses that teach some of the basic skills involved in restoring and maintaining mining heritage.
- Work with craft and art organisations to offer residential courses based around producing artworks working with tin.
- Encourage and actively support the local Open University to develop courses and resource material relating to mining heritage.
- Develop web-based content that promotes life-long learning opportunities relating to the proposed WHS area.
- Promote life-long learning opportunities to the local resident population.

## **Overseas visitors – Germany, Ireland, France**

As the market segmentation chapter pointed out, the theme of the WHS offers little in the way of promotional opportunities that warrant active promotion to these overseas segments. The main opportunity is to engage this audience in the need to preserve the essential qualities of the WHS. This is a message that will particularly resonate in the 'eco-aware' Germany market. The tactics are similar to those suggested for the domestic long holiday market, i.e.:

- Ensure Tourist Information Centres are stocked with information about opportunities to walk and cycle within the mining heritage landscape.

- Encourage accommodation providers, cycle hire firms and TICs to promote holiday cycling (see separate section) using Mineral Tramways and other rights of way that link with mining heritage.
- Ensure on-site interpretation enables intellectual access to the more casual visitor as well as those seeking more detailed knowledge.
- Road and pedestrian signage have an important part to play in raising awareness of the WHS.

### **Lifestage (pre-family holidays and breaks)**

It is recommended that no specific marketing activity is targeted at this group. Many of the proposals included within the domestic long holiday market are applicable to this market.

### **Cosmopolitans / Discoverers**

The market segmentation process saw these two psychographic segments as secondary markets because their motivations are less clearly aligned with the natural and cultural assets of the WHS. It is envisaged therefore that these groups will be reached through the marketing methods outlined for other secondary segments and in the methods contained in Chapter 7 under the heading *General marketing issues*.