

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

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1 INTRODUCTION

In December 2003, The Tourism Company was commissioned by the Cornwall and West Devon Mining Landscape World Heritage Site (WHS) Project to develop a marketing strategy to inform and be an integral element of the Management Plan for the proposed WHS.

The brief identified that, at this stage, the marketing strategy elements of the Management Plan:

“are only required to identify the overall policies and principal aims for the effective and sustainable development of the WHS”.

Detailed objectives and actions can be defined at a later stage. *“The purpose of this strategy is to establish what these overarching, high level principle aims should be and to identify a consistent, integrated approach to achieving these aims, in part by identifying shared issues for all (or the majority) of the 10 bid areas.”*

The brief also detailed a number of objectives for the strategy. These are:

- Establish current marketing activity and spend within the site areas and what results this produces.
- Compare existing activity against the potential for sustainable growth / improvement but within the context of the WHS Vision and Aims. More specifically, this would involve:
 - auditing existing visitor attractions;
 - assessing existing audiences/performance against capacity and potential for growth;
 - identifying priorities for the marketing strategy which balances conservation with optimum usage;
 - investigating the Cornish mining brand.

1.1 Work programme

The production of this strategy has been guided by the Strategy Steering Group and by members of the WHS Bid Project’s Marketing and Interpretation Panel. The work programme has involved:

- Site visits to all 10 bid areas and to all the accessible mining heritage-related visitor attractions identified by the client.
- A review of research related to cultural tourism, industrial heritage, mining heritage, World Heritage Sites and general activity holidays.
- A postal/ email questionnaire sent to mining related visitor attractions throughout Cornwall. The questionnaire covered areas such as existing marketing activity, visitor numbers and trends and development plans.

- Face to face and/or telephone interviews with representatives involved in the promotion and management of visitor attractions, landscape areas and destinations in the WHS.
- A review of best practice in relation to industrial heritage and WH marketing.
- A market segmentation exercise.
- A stakeholder workshop held in Truro that focused on the potential market, product definition and marketing principles and opportunities.
- Strategy preparation in the light of comments made at the workshop with further research and analysis.

1.2 Structure of the report

This report has three main sections. It starts by looking at the potential market; existing visitors to Cornwall and the industrial heritage market in the UK and locally. In the light of this market, we then review the WHS attractions and identify the relevant product for the strategy and consider how the heritage is currently being promoted. Finally, we turn to the strategic aims, objectives including target markets and overall approach and some suggestions for the subsequent tactical approach.

Full details of the product, target markets and comparative information on other WH Sites are presented as appendices in a separate volume. An executive summary is also available.

2 MARKET ASSESSMENT

This chapter provides an overview of key markets within which the proposed WHS operates. It looks at both geographically relevant markets (i.e. Cornwall and West Devon)¹ and at markets where the theme of the bid area is relevant (i.e. industrial heritage and mining tourism). The chapter is split into three main sections. These are:

- A market overview of tourism in Cornwall.
- An examination of the market for industrial heritage.
- An assessment of the industrial heritage market in Cornwall.

The aim of the chapter is to place the WHS bid in context of existing tourism marketing patterns. The information also provides a valuable pointer as to which market segments should be targeted for further assessment in the segmentation exercise.

2.1 Tourism in Cornwall & West Devon

Tourism is a major contributor to the economies of Cornwall and West Devon. In 2001 the sector was estimated to generate 24% of the Cornwall's GDP and employ 15% of the workforce². In West Devon in the same year the main tourism sectors were estimated to account for 11.3% of the area's GDP³. In terms of their positions within the South West region, the table below shows the strength of Cornwall and Devon relative to other areas⁴.

Table 1 Tourism share within South West region

County / Area	% of trips in SW
Devon	30%
Cornwall	19%
Somerset	12%
Dorset	17%
Former Avon	10%
Wiltshire	7%
Gloucestershire	7%

Source: UKTS and IPS 2001, taken from *State of South West Tourism, The Tourism Company* (commissioned by South West Tourism), July 2003. Percentages are rounded up.

¹ It should be noted that in the following section some of the statistics quoted relate to Devon rather than the district of West Devon. This is because the full range of national tourism statistics available at a county level is not readily available at District level. Where this is the case, figures and commentary on the County have been used in their place.

² Cornwall Tourism Strategy, A 3D Vision – Delivering Distinctive Difference, Cornwall Tourism Focus Group, 2000

³ The West Devon Economy 1991-2001, West Devon Borough Council, 2003

⁴ SW England is the regional market leader in holiday tourism; it receives 19% of all domestic holiday trips, 25% of nights and 23% of spend

As the table shows, Devon as a whole accounts for 30% of the region's tourism whilst Cornwall accounts for 19%. Figures from Devon County Council⁵ show that West Devon accounts for 3.3% of the County's tourism and from this we can estimate that West Devon accounts for around 1% of SW tourism.

Visitor figures show that in 2001, Cornwall attracted 5 million visits generating approximately £1.35 billion of spend. West Devon attracted 340,000 staying visitors⁶.

Some key characteristics⁷ of tourism in Cornwall are:

- High level of dependence on holiday visitors, especially long holidays (long holidays account for 2/3 of domestic nights and spending).
- Tourism in Cornwall is highly seasonal, with 64% of holidays by UK residents taken in the 3rd quarter (July, Aug & Sept). This figure compares with 60% for the same period in the South West and 42% in the whole of the UK.
- The short holiday sector is relatively small, reflecting the relative isolation of the county from centres of population (25% of trips compared with regional average of 37%).
- Spend per night (£43) is average for the South West region.
- 70% of visitors are in ABC1 socio-economic groups.
- Low levels of business and overseas tourism (4% compared with 10% average for the SW region).
- Visiting friends and relatives (VFR) accounts for 21% of trips, higher than the regional average of 19%.
- It is worth noting that despite an overall downward trend, the average trip duration and spend per trip is still relatively high (4.8 nights and £206 spend). This reflects the dominance of the long holiday sector.
- The proportion of new visitors to Cornwall remains strong⁸.

Some characteristics of tourism in Devon are:

- Better balance than Cornwall between long and short holidays (long hols 42%, short hols 34%).
- Low levels of overseas tourism (5%).
- VFR is less important than in Cornwall (14% as compared with 21%) and below the regional average.
- Spend per trip is £167, lower than Cornwall and lower than the SW average of £173.

The existing tourism profiles of Cornwall and West Devon have led to key stakeholders identifying a number of regional and local tourism priorities. Key amongst these is the need to address the issue of seasonality by stimulating more

⁵ Devon Tourism Trends 2002, Devon County Council,

⁶ State of Tourism South West, The Tourism Company (commissioned by South West Tourism), July 2003

⁷ various sources including State of Tourism South West (see above) and Cornwall Tourism Strategy, a 3D Vision, Cornwall Tourism Focus Group, 2000

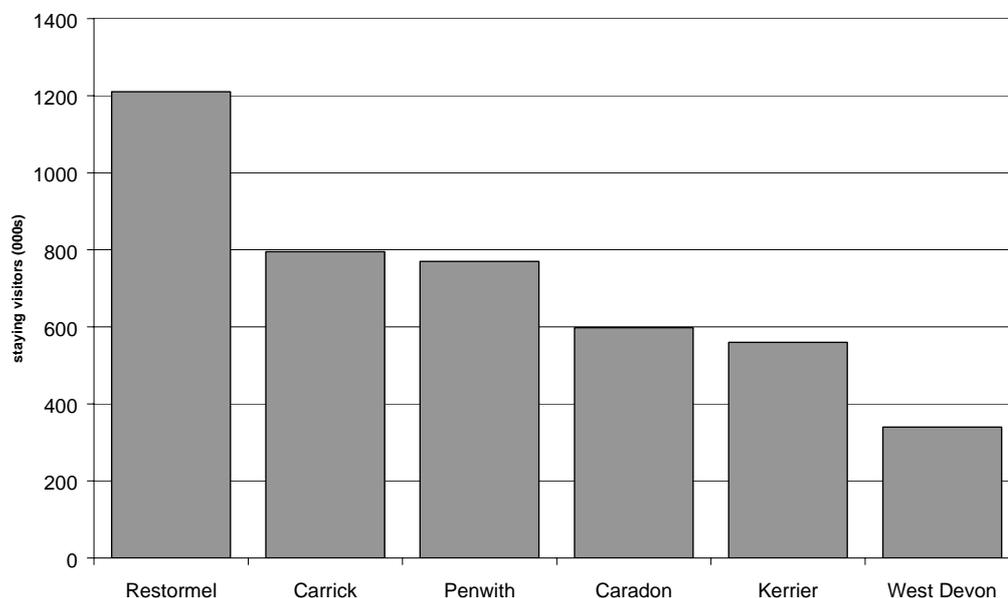
⁸ Cornwall Visitor Survey 2002 – 2003, Cornwall Tourist Board

visits in the shoulder months. There is also a consensus that new products and offerings need to be developed, and that marketing approaches need to be consistent and embrace more fully principles of market segmentation. Within such an approach, high value customers are sought as too are campaigns and products that emphasise local distinctiveness.

To be effective, the WHS Marketing Strategy needs to address itself to this agenda and contribute towards the re-profiling of the tourism markets in Cornwall and West Devon. These issues will be explored in more detail later in this report.

2.1.1. Visitors by District

Not all parts of the WHS attract similar amounts of staying visitors. The table below shows some of the differences between areas.



Source: State of Tourism South West, South West Tourism, 2003

We can see from the graph above that the WHS area is characterised by considerable differences in visitor numbers.

Restormel is the top destination, attracting around 1.2m visitors per year. This constitutes just over a fifth of the total number of staying visitors for Cornwall. West Devon attracts the least staying visitors. There are a number of factors that may explain this spread of visitor figures. These include the available accommodation stock in each area, accessibility to main markets and the range of attractions in each area.

2.1.2. Staying visitor profile

The latest survey of visitors to Cornwall⁹ provides the following profile:

- Nearly half of all visitor groups come from the South East of the UK.
- Almost half are couples, but families outnumber them, in the peak season.
- A majority of groups contain an adult aged 35-54.
- Almost $\frac{3}{4}$ of visits last 7 nights or less.

2.1.3. Perceptions and the reasons for visit

In order to assess the strategic fit of the mining heritage with existing visitor profiles, it is useful to look at the perceptions of Cornwall and Devon and the motives behind why people visit the area.

Perceptions

Some insight into how Cornwall and Devon are perceived by potential visitors can be gained from focus groups commissioned as part of South West Tourism's market intelligence report.¹⁰

There was a positive view of the two counties and a good awareness of what the area has to offer but significant difference between lifestage groups in terms of what they were looking for:

- *Pre-family*: Limited knowledge of the area, but had positive memories of childhood holidays. Some appeal for longer breaks but not as a holiday due to weather. Interest focuses on lively resorts and nightlife such as Newquay and Torquay.
- *Family*: Considered too far for breaks but good for family holidays with plenty to interest the children and good scenery for the adults. The coast is the key element in the appeal and the ability to move from north to south coast increases the range of possibilities.
- *Post-family*: Attractive for longer breaks and some wee long holidays but abroad is preferred destination because of guaranteed weather. Cornwall is too far for short breaks. The area is valued for its scenic beauty, coasts and gardens. Cornwall is known for its rugged coast, Devon is softer countryside.

Reasons for visit

The annual Cornwall Visitor Survey has been conducted since 1987 and provides some useful information on the reasons why Cornwall was selected as a destination. The table below shows the ten most cited reasons for choosing the County. Also included in the table are the results of a specially commissioned Cornwall Visitor Survey that gained responses from visitors to the proposed WHS area.

⁹ *Ibid*

¹⁰ *see ref 6*

Table 2 Why respondents chose Cornwall

Reason	Cornwall visitor Survey 2002/2003	WHS / Cornwall Visitor Survey (May - Oct 03)
Regular visitor	16%	19%
Favourite Destination	15%	16%
Friends and family	11%	12%
Eden Project	11%	10%
Scenery/countryside/landscape	9%	9%
Beaches / seas / coast	7%	7%
Never been before	7%	6%
Gardens	6%	7%
Sunshine / weather / climate	4%	4%
Occasional visitor	3%	-
Beautiful / unspoilt /clean	-	4%

Source: Cornwall Visitor Survey 2002 – 2003, Cornwall Tourist Board; World Heritage Site / Cornwall Visitor Survey May – Oct 2003, Cornwall Tourist Board

We can see that familiarity and the quality of the natural environment are the main appeals of Cornwall. Gardens and the high profile of the Eden Project are also influencing people's choice of Cornwall as a destination. The importance of those visiting friends and family, is also clearly seen.

Confirmation of the over-riding importance of Cornwall's natural assets is contained in a report carried out by the National Trust in 1999 that showed that 81% of all holiday trips to Cornwall are motivated by conserved landscape.¹¹

It is worth noting here that heritage or historic aspects do not feature in the vast majority of respondents' reasons for choosing Cornwall. More information about industrial heritage's profile in the decision making process is included later in this chapter.

2.1.4. Day visitors / resident population

National estimates of the day visits 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* strategy¹², 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.

¹¹ Cornwall AONB Management Plan

¹² *enjoyEngland*: The Strategy, England Domestic Tourism Marketing 2003/4 to 2005/6, England Marketing Advisory Board, Sept 2003

At a local level there is some limited data¹³. From this we know that:

- Non-local day trips generated 9.5m trips in 1998 and were worth almost £134m in associated spend.
- The pattern of trips varies from the national trend in that the countryside is the most popular location for day trips (43%), with coasts attracting 31% and towns and cities 25%.

The differing day visit pattern may reflect the fact that most staying visitors are located on the coast and are therefore heading inland more than the national average. The low showing for towns and cities may reflect the relative lack of major urban conurbations in the area.

Residents also make up a proportion of the Cornwall and West Devon day visits market. Although exact figures are hard to come by there is evidence of the importance of locals to certain attractions in the area. 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 locals¹⁴.

In addition, a recent economic assessment of the South West Coast Path estimated Cornwall residents' use of the South West Coast Path to be worth about £27m annually.

2.1.5. Activities undertaken whilst in Cornwall

One possible objective for the WHS is that it can be used to influence the visit and spend patterns of existing visitors. In order to do this effectively there is a need to understand the existing interests of day and staying visitors. The table below lists some of the main activities.

Table 3 Activities engaged on whilst visiting Cornwall

Rank	Activity	%
1	Gardens	65%
2	Beach	61%
3	Try local food / drink	58%
4	Coast walks	56%
5	Explore historic towns	54%
6	Historic houses	47%
7	Museums / galleries	45%
8	Restaurants	41%
9	Country walks	41%
10	Shopping	37%
11	Buy local arts / crafts	35%
12	Mining heritage	26%

Source: World Heritage Site – Cornwall Visitor Survey May to Oct 2003

¹³ Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996, quoted in *Cornish Mining WHS Bid Economic Impact Assessment*, Cornwall Enterprise, June 2003

¹⁴ *Economic Impact of the Mineral Tramways*, 1996, quoted in *Cornish Mining World Heritage Site Bid Economic Assessment*, Atlantic Consultants, June 2003

We can see from the table that:

- Gardens, beaches and coastal walks are each popular for more than half of all visitors to the County.
- The majority of visitors are looking for locally distinctive experiences and in particular the chance to sample local food and drink.
- Historic houses and towns constitute part of the itinerary for around half of visitors although mining heritage is an activity for less than half this amount (26%).

2.2 The market for industrial heritage

Industrial heritage is part of the much wider heritage market, a diverse market that covers everything from historic houses and gardens to places of worship and destinations associated with famous people. In 2002, around 63 million visits were made to sites that could be considered to be formal historic visitor attractions in England.¹⁵ 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.
- 13 million people visited places of worship.
- 9 million to heritage/visitor centres.
- 7 million to castles/forts.

Industrial heritage sites tend to be classed under the heritage / visitor centres category so it is clear from the statistics above that although they generate a sizeable number of visits, industrial heritage sites are less popular than many other parts of the heritage sector.

Specific market information on industrial heritage is thin on the ground, with one of the few exceptions being research commissioned by English Heritage in 1998¹⁶. This offered the following observations on the market for industrial heritage based on a survey of 300 sites across the UK.

- Visits to industrial heritage sites included in the survey increased by 21% between 1990 and 1997, rising from just under 3.7 million to more than 4.4 million visits per annum.
- Much of the growth was the result of more sites opening to the public.
- Only a very small number of sites attracted more than 50,000 visitors p.a.
- 50% of all industrial heritage sites had fewer than 5,000 visitors.
- The average number of visitors was just over 19,000.

¹⁵ These figures are based on a 50% response rate to the survey, and actual figures are likely to be considerably higher. *Survey of Visits to Visitor Attractions*, 2002.

¹⁶ *The Market for industrial Heritage Sites*, Insights, Jan 2000

- 22% of sites had funding applications outstanding at the time of the research.

Their assessment concluded that the market for industrial heritage was mature with little potential for substantial growth. Increased competition resulting from the opening of more sites meant that individual attractions would need to fight harder to maintain market share.

2.2.1. Visitor profile at industrial heritage attractions

A survey by Scottish Tourist Board¹⁷ in 1996 found that:

- Most visits to industrial heritage attractions in Scotland are day trips by the resident population.
- Tourists visiting friends and relatives show a particular interest in Scottish industrial heritage attractions.
- Scotland's industrial heritage attractions appear to appeal to a wider range of people when compared with other, more traditional heritage attractions and with more modern facilities such as science centres and theme parks.
- Most industrial heritage sites and museums in Scotland have a high proportion of repeat visits and a strong educational role.
- Scottish industrial heritage attractions do not appear to achieve high penetration into the overseas market.
- Groups account for at least 20% of visitors (and up to 30% if school parties are taken into account).

2.2.2. Market segmentation

A number of studies have sought to segment the heritage market by using a method based upon the level of interest people have in the subject. The research by English Heritage, quoted in the previous section, utilised this approach in its analysis of the relative importance of the various market segments for industrial heritage attractions. The results are summarised in the following table.

Table 4 Importance of different market segments to industrial heritage sites

Market segment	Of little or no importance	Quite important	Very important
Tourists and day-trippers with little or no interest in industrial heritage	28%	46%	26%
Tourists and day-trippers keen to learn more about industrial heritage	16%	23%	61%
Enthusiasts / interest groups already well-briefed on the site and its history	19%	26%	55%
Foreign/overseas visitors	35%	42%	23%
Education groups	24%	19%	57%

Source: *The Market for Industrial Heritage in the UK, Insights*, Jan 2000, ETC

¹⁷ quoted in 16

We can see that there are three main markets for industrial heritage:

- Tourists and day-trippers keen to learn more about industrial heritage
- Enthusiasts and special interest groups
- Education groups

2.3 The market for mining heritage assets and attractions in Cornwall and West Devon

This section looks at the market for mining heritage within Cornwall and West Devon. It draws together information from visitor surveys undertaken at a County level along with existing user surveys from individual attractions. Also included here are the results from a survey of mining heritage attractions commissioned specially as part of the marketing strategy development process.

The section is split into two main parts. The first part looks at information relating to mining heritage assets in general terms whilst the second part focuses on visitor attractions.

2.3.1. The market for mining heritage assets in Cornwall and West Devon

The WHS Management Plan illustrates the diverse nature of mining heritage in the area. Although one could define all aspects as attractions, there are many that are not visitor attractions in the formal sense of a clearly defined, paid admission site. Examples include many of the engine houses in the area that have been preserved as ruins, workers cottages that are still in residential use and entrances to mine shafts. Given this broad product definition, it is useful to make comments regarding the market at this level.

Results from the Cornwall Visitor Survey show that mining heritage is not currently a major influence on destination choice. Only 1.9% of visitors cited mining heritage as a reason why they chose Cornwall as a destination. Adopting a different methodology, the WHS Economic Impact Assessment estimated that 6% of visitors considered mining heritage to be very important in planning their trip with an additional 7% stating it to be fairly important. As this report will explore in more detail, this current level of performance reflects the limited marketing resources available to heritage attractions and their subsequent low profile in the marketplace.

Mining heritage's influence is far greater once people are in the area. For instance just over a quarter of visitors (26%) stated that mining heritage was to form one of their activities whilst visiting the area¹⁸.

It would appear that visitors' patterns of behaviour towards mining heritage are not due to a lack of awareness. Over 91% are aware of the area's historic links to mining¹⁹. The following table looks at the specific aspects with which visitors are most aware.

¹⁸ WHS Cornwall Visitor Survey May – Oct 2003, Cornwall Enterprise, 2003

¹⁹ *Ibid*

Table 5 Aspects of mining heritage (excluding visitor attractions) that respondents are aware of

Aspect aware of	%
Tin mining / tin	45%
China clay/clay mines	20%
Gold mines / gold	6%
Redruth and Camborne	5%
Copper mines / copper	4%
Slate	3%
St Austell	3%
Ruins / chimneys /mine shafts	3%

Source: WHS Cornwall Visitor Survey May – Oct 2003, Cornwall Enterprise, 2003. Note: figures exclude awareness of specific visitor attractions.

The table shows visitors knowledge of mining relates mostly to the raw materials that were mined in the area. There is far less awareness of the specific areas that are most associated with the industry. Awareness of the physical remains of mining stands at 3% of visitors.

Figures such as those above suggest that there is a need for greater efforts to be made in developing people's very general knowledge of the area's association with mining. Effective interpretation at a local level and a comprehensive framework at a WHS level are two ways in which this might be addressed.

2.3.2. The market for mining heritage-related visitor attractions in Cornwall and West Devon

This section looks at the current visitor numbers at mining heritage-related attractions in the WHS area and also assesses what the potential might be for the market.

The size of the local market depends to a large extent on how the sector is defined. The WHS Economic Impact Assessment²⁰ defines a set of specific mining attractions and a further set of attractions that have an appeal wider than mining heritage. Using this definition and assigning only a proportion of total visits to the attractions with wider appeal produces an estimate of 598,168 mining heritage visits. The visit figure is derived from the following amount of mining heritage visits:

- 51% to attractions with an entrance charge.
- 47% to free attractions.
- 2% to public archives and records offices.

The survey of mining heritage attractions conducted as part of the preparation for this strategy found the following characteristics:

- Average visitor numbers were 27,000 p.a. Numbers were higher at attractions whose appeal can be defined as being wider than mining heritage. Garden and historic homes with mining connections fall into this category.
- Visitor numbers are stable except where there has been a major change in opening hours in which case increases of up to 30% are reported.

²⁰ Cornish Mining World Heritage Site Bid Economic Impact Assessment, Cornwall Enterprise, 2003

- Education groups account for 9% of visitor numbers.

In addition to the overall market size, the WHS marketing strategy needs to take account of the relative importance to mining heritage attractions of visitor markets as compared with day visits by locals. Looking at the available data it is clear that there is a range of surveys that provide very different results.

- The WHS Economic Impact Assessment referred to above estimates that 53% are visitors staying away from home and 47% day visits from home.
- The survey of mining heritage attractions commissioned as part of this strategy's development²¹ found that visitors constituted 75% of the total visits with residents / locals accounting for 25%.
- A survey of visitors to Geevor Tin Mine found that 9% were local and 91% visitors.²²

Despite the variance in the findings, it is clear that mining heritage attractions in the WHS (a major holiday area) are more reliant on visitors than is the case for industrial heritage attractions at a national level where local residents are more important.

The potential market

The previous section offered insights into the current market for mining heritage attractions. In this section we look at the potential for the market. One method of assessing the potential market for mining attractions in the area is to look at levels of awareness. The table below sets out this information, together with information on the percentage of visitors planning to visit these attractions.

Table 6 Awareness of and likelihood of visit to mining heritage-related attractions

Visitor attraction	% aware	% planning to visit
Poldark Mine	15%	1.5%
Geevor Tin Mine	13%	2.2%
Wheal Martyn	4.3%	3.7%
Levant Mine	4.4%	0.7%
Tolgus Tin	1.3%	0.1%
Morwellham Quay	0.5%	0.2%
Blue Hills Tin Mine	0.3%	-
Cornish Mines and Engines	0.3%	0.2%
Tramways	0.3%	-
King Edwards Mine	0.2	-
Crofty Mine	0.2	-
Kit Hill	0.2	-
Godolphin	0.1	-

Source: WHS Cornwall Visitor Survey May – Oct 2003, Cornwall Enterprise, 2003. Survey conducted at a mix of 16 visitor attractions. It should be noted that the survey from which the figures are drawn involved sampling at visitor attractions so it is likely to over represent the awareness and visit likelihood compared with visitors in general.

²¹ postal / email questionnaire sent to approximately 40 mining heritage related attractions during Feb and March 2004.

²² Geevor Visitor Survey, 2003

The table shows that less than one fifth of visitors are aware of Poldark Mine, the highest ranking mining heritage attraction. Geevor Tin Mine is the second most cited attraction, but beyond these two, awareness is very low. This suggests more should be done to raise awareness of mining attractions and especially amongst those already visiting specific attractions. However this needs to be balanced against the already referred to low levels of marketing resources currently available to individual sites.

As one would expect, the figures for those visitors actually planning to visit to a specific attraction are lower than those aware the attraction. This is because awareness of a particular site does not automatically translate into attendance. However, rather than focus on the conversion of awareness to actual visit, the first marketing priority should be to raise the levels of awareness amongst visitors and local day visitors.

2.4 Market assessment – some conclusions

It is clear from the information presented that Cornwall and West Devon are very popular holiday areas but with a high reliance on the family long holiday market. This market is both very seasonal and set to decline in importance. The overall popularity of the area disguises quite considerable differences in the numbers of staying visitors attracted to each district. This suggests that the WHS marketing strategy could be used to develop tourism in areas where there is capacity and infrastructure for additional numbers of visitors. This approach is supported by the Economic Impact Assessment undertaken for the WHS²³. The Marketing Strategy should also seek to address the seasonality issue and other regional and local tourism priorities and thus contribute towards a re-profiling of the tourism markets in the WHS.

The evidence from existing tourism markets in Cornwall and West Devon suggests that the vast majority of visitors are currently not drawn to the area primarily as a result of heritage in general or industrial heritage specifically. Instead, the primary motivators of visits are the area's natural environment and the value placed on gardens and garden attractions such as The Eden Project.

There is evidence to show that mining heritage is part of the itinerary for about a quarter of visitors once they are in the area. There are opportunities to widen its appeal as other types of 'heritage' attractions such as historic homes, towns and museums and galleries are more frequently part of visitor's itineraries than mining heritage. The WHS's comprehensive definition of the mining landscape – incorporating country houses and gardens built with mining profits, urban settlements, social infrastructure and transport networks – provides a clear rationale for this.

Although awareness of the area's association with mining is high, there is low awareness of individual attractions amongst visitors, resulting from low investment in marketing. Despite this, mining heritage attractions in the area are heavily reliant on tourists rather than locals for their custom, a fact that distinguishes them from the national trend amongst industrial heritage attractions. This indicates that in order to sustain long-term viability, it is essential to increase investment in marketing.

Although less important for attractions, local residents appear to engage more frequently with the broader mining heritage assets discussed in this chapter. This is

²³ see ref 20

particularly through the use of trails and paths such as the SWCP and the Mineral Tramways routes.

If mining heritage attractions are to be sustainable in the long run and the benefit of the WHS be maximised, visitor markets cannot be ignored. As such there is a need, in addition to increased investment, to improve cross-marketing at attractions and a need to package mining heritage as a key element in the promotion of the destination as a whole. Attractions should also be seen in the context of the surrounding environment and with a number of key issues addressed:

- Ease of access – road and transport links, parking.
- Other complimentary activities or attractions nearby.
- Provision of places to eat, drink and shop.
- Proximity to accommodation.

3 THE MINING HERITAGE VISITOR PRODUCT

In this section we consider the scale and scope of the mining heritage product and review the appropriate level of product to be promoted. We focus on the strengths of the Landscape Areas before turning to the role of local attractions as interpretation centres and the concept of “Key Sites” for the WHS.

3.1 Defining the product

The Cornwall Mining Heritage 'product' is described in detail in Appendix I. From a marketing perspective, the product can be viewed at two levels:

1. There are approximately 40 identified sites of potential interest to visitors. Within this group is a wide mix of visitor attractions, sites or facilities in terms of scale, breadth, interpretation, quality and relevance to the WHS. The list includes:
 - Mine sites;
 - Heritage centres/museums;
 - Archives;
 - Mining related houses, gardens;
 - Mining towns and villages; and
 - Mine sites set in landscape.

They may also be categorised by scale and relevance to visitors (Table 7).

Table 7 Category of attraction

Major relevant attractions in WHS	Other major attractions, less relevant or outside WHS	Minor relevant attractions in WHS	Minor relevant attractions outside WHS	Potential attractions and other resources
1. Morwellham 2. Geevor/ Levant Mines 3. Cornwall's Industrial Discovery Centre 4. Poldark Mine 5. Godolphin House & Estate	6. Royal Cornwall Mus. 7. Tolgus Tin 8. Shipwreck Museum 9. Penlee Museum 10. Trevarno Estate 11. Wheal Martyn 12. Cotehele	13. King Edward Mine 14. Minions Heritage C 15. St Agnes Museum 16. Blue Hills Tin 17. Camborne Museum 18. Redruth Museum 19. Murdoch House 20. Trevithick Cottage 21. Cornwall Centre 22. Cornwall Records Off. 23. Waterfront Inn 24. Gwennap Pit/Museum of Methodism 25. Botallack Count House 26. Liskeard Museum 27. Tavistock Museum 28. Callington Museum	29. Rosevale Mine 30. Wayside Folk Museum 31. Helston Folk Museum	32. S Crofty Mine 33. Robinsons Shaft 34. Perran Fdy 35. Harvey's Fdy 36. St Days H.C. 37. Wheal P'vor 38. Camborne Sch. of Mines 39. Royal Cornwall Geological Museum

2. The product can also be defined in terms of the 10 varied, iconic Landscape Areas (urban and rural) that are central to the proposed Inscription. See Appendix I for more detailed reviews of the Landscape Areas. In tourism terms, these Areas involve powerful, promotable images e.g.:

- Wild and rugged Atlantic coast (St Just and St Agnes);
- Southern valleys (Tamar, Luxulyan, Perran);
- Urban centres (Hayle and Camborne/Redruth);
- Moorland (Caradon Hill); and
- Restored rural areas (Wendron, Gwennap, Tregonning and Gwinnear).

Within the Landscape Area, there is a wide range of mining related stories and themes to interpret. See Appendix I.

3.2 Interpreting the product – WHS universal values and themes

Any assessment of the WHS product needs to also take account of the way in which the product is currently interpreted. This is because within the WHS, as elsewhere, interpretation often provides 'intellectual' access to stories and themes connected to the cultural landscape. As has already been stated, interpretation can take many forms, from the on-site panels to guided walks, events and first person narration. Whatever its form, interpretation provides a way to make visible the social and political histories connected with mining that are not so apparent purely from the physical archaeological remains within the WHS.

It lies outside the brief of this study to develop a comprehensive interpretation strategy. However, the following section summarises the current approach being taken to interpretation themes whilst Chapter 7 includes a proposed framework within which detailed interpretation could be developed both at a local site level and across the WHS.

Current approaches within the WHS are varied. Appendix 1 includes a detailed assessment of all 10 Landscape Areas and the major attractions, sites and facilities within these. The commentary highlights many of the ways in which interpretation contributes to an understanding of a particular site. In order to draw some conclusions from the existing approach to interpretation it is useful to look at the themes covered at major attractions and public archives. Two sources are used for this purpose. The first is presented in Table 8 . This summarises an analysis carried out by the WHS team that lists the most commonly cited main themes at a broad range of attractions (see Appendix II for full list).

The second derives from a survey conducted as part of the background to this strategy²⁴ of a similar range of attractions, but which asked staff at the attraction to indicate what they felt was their main theme and which were subsidiary themes.

²⁴ see ref 21

Table 8 List of the top 5 interpretative themes/ methods within the WHS

Theme
1. Local history (local museums)
2. Archives
3. Mining history (sole or main focus)
4. Social history / People
5. Underground experience

Source: Analysis by WHS Team, (included as Appendix II)

Table 9 Ranking of interpretative themes at selected attractions within the WHS

Theme	Rank	
	Main	Subsidiary
Mining history	1 st	7 th (=)
Underground Access	5 th (=)	12 th
Ecology	10 th (=)	1 st (=)
Geology	7 th (=)	3 rd (=)
Local history	5 th (=)	1 st (=)
Maritime	10 th (=)	10 th (=)
Engineering	7 th (=)	5 th (=)
Folk Museum	10 th (=)	7 th (=)
Archive / library	7 th (=)	5 th (=)
Mineralogy	4 th	7 th (=)
Social history	3 rd	3 rd (=)
Others	2 nd	10 th (=)

Source: WHS Attractions survey (see Ref 21)

Table 8 shows that local history museums are more numerous within the WHS than attractions that concentrate purely on mining heritage. In terms of interpretative approach, most of the local museum sites provide a limited overview of Cornwall and West Devon's mining history with some focus on local artefacts and stories where appropriate. This overview is part of a broader sweep of interpretation which looks at other local industries and social aspects of the area. The WHS also benefits from a number of archives. Some of these relate to the history of specific sites (e.g. Geevor Mine archive) or to more general Cornish themes and /or genealogy (e.g. Cornwall Centre).

Mining heritage as the sole or main focus is a feature of a smaller number of specific mining heritage attractions. Some include a guided underground mine experience (or in the case of Poldark Mine, unguided at peak times). The oral interpretation is broad in scope but covers areas such as the working conditions of miners, geology, processing methods, the rise and decline of the industry, emigration and past and current end uses of the extracted material.

The social history of mining is covered at sites other than those with an underground mine experience. In these cases miners' working conditions and the emigration of miners are commonly-used themes.

Table 9 shows similar trends but has some useful additional information regarding subsidiary themes presented at attractions. There are a number of cross-cutting themes that feature strongly. Green issues (ecology) and social and local history are amongst these whilst the area's distinctive geology features at several sites. The fact

that mining history ranks only seventh as a subsidiary theme suggests that it is currently being dealt with at specialist mining heritage attractions rather than receiving extensive coverage at other non-mining attractions.

3.3 The mining heritage visitor product – some conclusions

In terms of the WHS and its promotion, the core product is the collection of 10 distinct Landscape Areas, interpreted on-site, at local centres and through local activities to add value to the inherent natural resource. Site visits suggest that the quality of interpretation and visitor experience is variable and that on-going management and maintenance is required at some locations to address these issues.

There are a variety of themes that are currently used to interpret the WHS. However, the analysis in this Chapter also suggests there is a tendency for mining heritage to be the main theme at a relatively small number of mining attractions but not be taken on as a subsidiary theme at attractions that have a broader remit than just mining heritage. Chapter 7 outlines an interpretative framework that could be used to develop a comprehensive interpretation strategy which addresses this and other issues.

4 CURRENT MARKETING

The marketing of the Cornish Mining Heritage WHS will not take place within a vacuum. Even now, before the Site's formal nomination, there are already a great number of organisations, companies and individuals involved in the marketing of mining heritage-related land, attractions and cultural assets within the WHS. In addition, there are key organisations whose activities at a national level are of direct relevance to the WHS.

This section addresses the need to place the marketing strategy within the context of existing marketing activity. It does this by looking at the marketing and promotion currently being undertaken and at key strategic documents that have, or will have, an influence on the WHS.

4.1 International

World Heritage Sites

Of the 754 sites on the UNESCO World Heritage List, there are currently 33 that are industrial heritage sites²⁵ (see Appendix III for a full list). Of these there are 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. Appendix III illustrates that most of the mining WH sites are very different in product terms to this WHS. The reasons include the fact that many relate to medieval mine workings or are linked to towns with a strong medieval history. Only a handful of the sites, including the Zollverein Coal Mine Industrial Complex in Essen, Germany; the Blaenavon Industrial Landscape in Wales and the copper mines of Røros in Norway offer extensive workings from more recent times. Even these more modern mine workings tend to be concentrated in a geographical area rather than dispersed throughout a series of non-continuous areas as is the case with the Cornwall and West Devon Mining Landscape WHS.

These factors mean that whilst some useful pointers in marketing can be derived from these other WH sites, addressing the unique characteristics of this WHS requires a tailor-made approach rather than one derived from elsewhere.

Another aspect worthy of note here is that there has been little research into the effect on visitor numbers that derives from gaining WHS status. UNESCO, themselves, allude to this fact in the introduction to their handbook on managing tourism at World Heritage Sites²⁶. One of the few international studies, commissioned by the Australian Heritage Commission²⁷, found that baseline data prior to inscription was often too vague or incomplete in order to allow meaningful comparison.

²⁵ UNESCO

²⁶ Managing Tourism at World Heritage Sites, UNESCO, 2002

²⁷ *World Heritage Icon Value: Contribution of World Heritage Branding to Nature Tourism*, Australian Heritage Commission, Australia, 2002

However anecdotal evidence from the WHS Economic Assessment and from The Tourism Company's work on other WH Sites around the world suggests that the visitor impact of gaining WHS status is marginal. Where visitor benefits do derive is from improvements in collaborative working arrangements and long term quality improvements brought about by the need to actively manage WH Sites.

UNESCO's view of tourism and its associated marketing at WH Sites addresses both the positive aspects and negative aspects that can be encountered. In its handbook on tourism, UNESCO says that "while tourism can contribute to protection and restoration efforts, the right balance between economic gain and undesirable impacts can be elusive."²⁸

As such, UNESCO argues strongly for a sustainable model of tourism development and one in which stakeholders are widely involved. They emphasise the need for tourism policies to be drawn up within the context of wider management objectives but reject simplistic arguments such as increases in visitor numbers automatically result in negative impacts. In proposing a practical way of developing tourism, UNESCO suggests the adoption of the International Cultural Tourism Charter which contains the following six principles:

- Since domestic and international tourism is among the foremost vehicles for cultural exchange, conservation should provide responsible and well managed opportunities for members of the host community and visitors to experience and understand that community's heritage and culture at first hand.
- The relationship between heritage places and tourism is dynamic and may involve conflicting values. It should be managed in a sustainable way for present and future generations.
- Tourism and conservation activities should benefit the host community.
- Conservation and Tourism Planning for Heritage Places should ensure that the Visitor Experience would be worthwhile, satisfying and enjoyable.
- Host communities and indigenous peoples should be involved in planning for conservation and tourism.
- Tourism promotion programmes should protect and enhance Natural and Cultural Heritage characteristics.

The development of aims, objectives and principles for the Outline Marketing Strategy need to address the principles listed above.

4.2 National

Department for Culture Media and Sport (DCMS)

DCMS is responsible for the UK's general compliance with the World Heritage Convention and for nominating potential WH sites in England. The Department is

²⁸ See ref 27

also working with individual site managers of existing WHS regarding the development of Management Plans.

In addition to their pivotal role in the nomination process and championing of best practice, the Department has also recently started to address what it calls:

“the minimal public awareness or appreciation of what World Heritage Site status means at a national level.”

Central to this agenda is the development of a series of communication initiatives that will be delivered directly by the Department or in partnership with organisations such as VisitBritain, local authorities and site managers. The initiatives include the development of a WHS website “portal”, events such as cycle rides between WH sites, the production of a WHS map and the placement of advertorials.

Although at this stage the initiatives cover a 12 month period running up to the end of 2004, it is possible that this series of initiatives signals a more proactive engagement by the Department in the promotion of World Heritage Sites. This is a position that is likely to be of benefit to the Cornwall & West Devon bid as and when it receives inscription.

VisitBritain

VisitBritain has recently launched a new domestic marketing strategy. Entitled *enjoyEngland*, the document contains a range of recommendations including:

- The five markets segments to be developed are leisure breaks (holidays of 1- 3 nights), business tourism, visiting friends and relatives, longer stays (4 nights or more) and day visits.
- England needs to be promoted as a series of niche products (i.e. by themes, activities or experiences) that come together to make up the overall proposition that is England.
- A compelling products and destinations brand strategy for England will prioritise the most appealing product themes and activities / interests which are identified to be the main drivers of domestic travel.
- From consultations undertaken as part of the strategy development, heritage, family and culture are identified as the most important consumer themes. Walking, cycling and eating are identified as the most important activities to be marketed.

The consumer themes and activities identified as showing most promise for the VisitBritain campaign fit well with the fundamental values of the WHS and suggest that the WHS can dovetail neatly with campaigns promoted at a national level.

4.3 Regional

South West Tourism

The South West Regional Development Agency and South West Tourism have recently launched the outline plans for their 10 Year Action Plan for Tourism. The document provides a framework within which those with a stake in the region's tourism industry can plan and implement their own policies and activities.

Already some of the key approaches to be taken have been launched. One of the key concepts is 'brand clusters' where accommodation, attractions, eating places and landscapes are combined to sell an experience rather than a destination. Amongst the clusters identified are:

- *History and Heritage*;
- *Close to Nature* (natural environment);
- *Discovery* (learning new skills and learning through experience); and
- *It's Adventure* (outdoor activities).

These destination clusters are targeted at a range of psychographic market segments that were originally developed by VisitBritain and which have been further developed for implementation locally by South West Tourism. Five out of the original eight segments identified at a national level have been highlighted as the most likely to visit the South West. These are: Cosmopolitans, Followers, High Street and Traditionals. Based on UKTS data, these five segments account for 77.7% of the current market value of short break holidays in the region.²⁹

It is apparent that the WHS proposition fits comfortably within all four brand clusters. Detailed assessment of the psychographic profiles also reveals that there is also a good match between the WH Site's features and the interest profiles of three of the five psychographic segments. More information on this segmentation process and the WH Sites strategic fit with it is included in Chapter 6 and Appendix III.

4.4 Local

This section provides a brief overview of the tourism activity undertaken by public and private sector bodies within the WHS bid areas. An understanding of their work is essential if the Marketing Strategy is to be compatible with wider objectives employed by these key stakeholders. It is also important to assess the way in which mining heritage is currently communicated within existing marketing activity.

Cornwall and Devon County Councils

The WHS bid areas fall within the administrative boundaries of two county councils - Cornwall and Devon.

29 South West Tourism Ten Year Plan: A Brand Architecture Based on Psychographic Segmentation Values, SWT and SWERDA, 2003

County-level tourism marketing in Cornwall is undertaken by Cornwall Tourist Board, a division of the Cornwall Enterprise, the Council's Economic Development Service.

The Tourist Board's activities are guided by a tourism strategy and by an annual marketing strategy. The tourism strategy, *Cornwall Tourism Strategy, A 3D Vision – Delivering Distinctive Difference*, was developed under the auspices of the Economic Development and Tourism Forum of Cornwall and the Isles of Scilly. On an annual basis, Cornwall Tourist Board's objectives are defined by the Cornwall County Council Contract with Cornwall Enterprise and the Cornwall Enterprise Corporate Plan. These objectives along with associated activity are set out in an annual marketing strategy. The objectives and activity for 2003 / 4 are:

- Reduce Seasonality.
 - Destination Marketing: Awareness raising in new markets , All Seasons Campaign, Gardens Campaign, Overseas Campaigns
- Develop Cornwall Brand.
 - Adopt new approach to all promotional style and focus on up-beat messages e.g. exhilaration.
- Target Promotions at High Spend Segments / Increase Penetration of New Markets / Retain peak season business levels
 - Target Segment Campaigns: Gardens, Weddings, World Heritage Site, Newquay Airport, Destination South West Cruise Calls, support with Public Relations.
- Provide information / convert to business
 - Marketing Services, Travel Trade and PR.

The Board undertakes a wide range of tourism marketing including accommodation quality schemes, travel trade promotions, websites, advertising and printed publicity.

The main destination guide, *Cornwall 2004*, is a 140 page destination guide covering the whole of the County and which is split into 5 geographical areas and one activity based section. (350,000 copies). Other items of print produced include Holiday Parks Guide (100,000 copies), Walking and Cycling (10,000 copies), Getting Married in Cornwall (12,000 copies) and Gardens (250,000 copies). CTB also produces a Travel Trade guide.

Web developments include the CTB website (www.cornwalltouristboard.co.uk). This is organised in a more thematic way than the printed guide and covers such aspects as arts and crafts, heritage and landscapes. The website also includes a password-protected travel trade section. CTB also runs a website to support its weddings campaign (www.getmarriedincornwall.co.uk).

Other marketing initiatives include promotion of Newquay Airport, PR activity, financial support for Cornwall Arts Marketing and ongoing consumer research including the annual Cornwall Visitor Survey. CTB has also actively engaged with the WHS process by commissioning WHS-orientated research and assisting with marketing development.

Devon County Council, unlike Cornwall, produces a range of activity / thematic guides rather than a destination guide. Guides include ones on walking, cycling and gardens. Devon County Council also works on a range of campaigns that are focused around the sustainable tourism agenda and opportunities to attract visitors out of season. These include the *Discover Devon* campaign and the proposed *Discover Devon Naturally* campaign, for which European funding is currently being sought.

Despite a relatively small proportion of visitors to Devon and Cornwall being from abroad, overseas visitors are increasingly being targeted, not least because they are high spenders and due to the availability of EU funding. The county councils in Devon and Cornwall have secured Objective 1 / 2 funding for overseas activity channelled through the overseas marketing consortium Devon and Cornwall Overseas Marketing (DACOM). Amongst the opportunities being pursued are a Cornwall-only campaign aimed at niche markets and a Devon campaign looking at the development of new markets.

Representation of mining heritage within existing marketing activities

County level tourism marketing features only limited reference to mining heritage. It is when mentioning West Cornwall that most is made of the mining heritage.

Mining heritage is only relevant in a relatively small part of West Devon and so has less profile in the tourism marketing of Devon County Council than in Cornwall. However, there is some limited reference to the mining-heritage related attraction Morwellham Quay.

Discussion with representatives from the two County Councils/CTB suggests that more work is needed on how best to ensure that imagery relating to mining heritage conveys the appropriate message of the area when used within wider-appeal destination guides and general holiday marketing.

The new overseas campaigns currently coming on stream that are part-funded by the EU (and which are featured later in this chapter under the heading *Consortia, partnerships and associations*) are seen as a way in which mining heritage can be included more fully in a targeted campaign.

District and borough councils

The WHS Bid Areas come under the jurisdiction of seven District / Borough Councils. Within Cornwall these are Penwith, Kerrier, Carrick, Restormel, Caradon and North Cornwall District Council. Within Devon, this includes West Devon Borough Council.

Only Caradon District and West Devon Borough Councils have published tourism strategies. Given this lack of strategic documents it is necessary to look at the tourism marketing activities of the local authorities in order to deduce their strategic priorities.

Generally it would appear that resources are devoted to supporting the main summer holiday markets but with a growing emphasis placed on initiatives designed to increase visits in the shoulder months and out of peak season.

Printed destination guides form the most important tool for many authorities. Caradon District Council produces a 60 page guide, *South East Cornwall 2004*. Restormel Borough Council produces two guides - *People Love Newquay Cornwall* and *Official Cornish Riviera Guide*. There is also a CD Rom version of the Newquay brochure.

A number of other councils have decided to pool their resources and work collaboratively. The main example is a West Cornwall campaign managed and funded by Carrick, Penwith and Kerrier District Councils. The campaign is promoted through a *Go West* destination brochure distributed nationally and through an associated website (*go-cornwall.com*). There is also a French language guide to the area that is promoted mainly in Brittany.

Specific campaigns aimed at increasing visits out of season include *King Harry's Cornwall*. This is supported by Carrick District Council as well as Cornwall County Council and numerous private partners and is managed by a private company. A large proportion of its funding comes from Objective 1 from the European Union. The initiative includes a website, visitor information packs and the promotion of special offers. West Devon Borough Council operates a grant scheme that aims to develop community tourism initiatives by funding at least three events per year to attract tourism in the shoulder months.

Representation of mining heritage within existing marketing activities

A review of the publications reveals that mining heritage does receive limited though not extensive coverage within existing marketing. It is perhaps not surprising that coverage appears to be greatest in marketing specifically related to the West of Cornwall, an area where mining heritage, in the form of iconic engine houses and other mining artefacts, is most visible to the visitor. For instance, the *Go West* guide contains a double page spread and a map detailing historical aspects including mining heritage. Images as well as text are used.

Perhaps due to the greater 'space' available on websites as compared with publications, these have a greater amount of content devoted to mining heritage. This tends to be linked to sections on heritage and typically features a general description and information about specific mining-related attractions. For instance, the website for the Cornish Riviera (www.cornish-riviera.org.uk) includes the St Austell Bay Heritage Trail which promotes attractions such as the Luxulyan Valley, Charleston Shipwreck Centre and Wheal Martyn.

The pattern of coverage would suggest that mining heritage is considered a specialist interest and not yet reached a position where it constitutes part of the imagery that is used to communicate Cornwall to potential visitors. Discussion with local authority tourism officers suggests that the use of mining heritage within destination guides and other tourism publications can be difficult because it conveys messages that are not central to Cornwall's product offering of beaches, sunshine, gardens, activities and landscape. There is also a feeling that mining heritage is not a major draw for visitors.

The audit of existing marketing did uncover some examples of innovative marketing techniques being used to promote the area's industrial heritage. Restormel Borough Council and Wheal Martyn run a number of half-day conducted tours/ guided walks that enable visitors to use their own car to tour areas such as the Luxulyan Valley, and Charlestown. These tours explain the industrial history of the area and allow visitors to access areas that normally would not be open to the public.

Protected landscape bodies

Over a third of the land area of the WHS falls within two Areas of Outstanding Natural Beauty (AONBs) – Cornwall AONB and Tamar Valley AONB.

Cornwall AONB consists of 12 separate parts of the County covering an area of 958 sq km. The AONB is managed by the Cornwall AONB Partnership which is made up of 7 local authorities, the Countryside Agency, National Trust, Government Office of the South West and the Cornwall Tourist Board.

The Partnership recently consulted on its draft Management Plan. The document contains a number of Tourism Priorities and Action Points.

- Develop a sustainable approach to the management of the tourism industry in Cornwall. (*Make use of the AONB as a demonstration area of sustainable tourism projects*).
- Identify pressure points requiring enhanced visitor and landscape management. (*Prepare landscape enhancement plans for selected areas to use as bidding documents to appropriate funding bodies*).
- Increase the level of investment into maintaining the landscape quality of the AONB by continued research into the Public Product and its future funding mechanisms (*Support the Objective One research into the economic impact model for the public product*).

The Tamar Valley AONB is located on the border of Devon and Cornwall and includes the lower valleys of three rivers, the Tamar, Tavy and Lynher, joining together at Plymouth Sound. The AONB covers an area of 190 sq km. A recent audit of the AONB identified over 600 archaeological sites with mining connections.

The AONB is managed by a Partnership and supported by the Tamar Valley AONB Service. The Partnership has recently produced its Management Plan covering the period 2003 to 2009. The Plan contains a number of points within its action plan that relate directly to tourism. These include:

- Develop and implement a targeted and strategic approach to public interpretation.
- Develop a programme of work across the AONB that uses public art to interpret the landscape.
- Produce education materials for all ages which help develop understanding about the AONB landscape. Work with schools, colleges and further education in and around the AONB on complementary programmes.
- Develop work to reinforce the AONB designation via careful use of the logo and interpretation.
- Develop themed trails.
- Support the development of the World Heritage Site and the implementation of the management plan.

- Work within Woodmeet / Tamar Valley Tourist Association to develop a marketing strategy for the Tamar.
- Produce visitor management strategy for the AONB which identifies key entry points, information areas, car parks and ways which visitors can support and interact with the landscape.

In addition to provisions made in the Management Plan, the AONB Service is currently engaged in a range of marketing initiatives. These include:

- A website that includes a range of days out information sheets. Two of these, *Days out... with Industrial Archaeology* & *Days Out with Historic Interest* make considerable reference to mining heritage.
- A Tamar Valley Festival held in July 2003. (Currently there are no plans to repeat the event during 2004).
- A joint bid with Morwellham Quay to the Heritage Lottery Fund to improve access routes around Morwellham Quay and Devon Great Consols.
- The development of a TAMAR Valley AONB brand which has also been adopted by the Valley's Tourism Association (see below) and the 'Marketing the Tamar Valley' project.

An interesting development has been AONB Service's facilitation of the development of the Tamar Valley Tourism Association (TAVATA). This was set up in 2001 with four main aims - to promote the Tamar Valley as a tourism area, share good practice, promote higher standards in provision of goods and services and promote 'sustainable tourism' in the area. Members include accommodation providers, pubs, local visitor attractions, local craftsmen and local food producers.

TAVATA has recently established its own website and produced a leaflet to advertise the Valley. The Association and the AONB Service have also been involved in establishing a project called 'Marketing the Tamar Valley', which aims to increase co-operative working and marketing, improve use of local products and services and to research the feasibility of generic branding for the area.

Consortia, partnerships and associations

There are a number of bodies that operate at a county or cross-county level. Of these, four have particular relevance to the WHS due to the markets they are targeting and the members they represent. The bodies are Devon and Cornwall Overseas Marketing (DACOM), Cornwall Association of Tourist Attractions (CATA), Cornwall Tourism Forum (CTF) and Cornwall Commercial Tourism Federation (CCTF).

Devon and Cornwall Overseas Marketing

Devon and Cornwall Overseas Marketing was set up in 1995 by the two county councils and 16 district/unitary authorities. It aims to target key overseas visitors. Core markets for DACOM are the car driving / touring, independent, long-stay central European visitor (German, Swiss, Benelux). Recently secured funding worth £2m across both counties over 3 years from the EU through Objective1&2 will be used by

DACOM to maintain and enhance activity in core markets but also focus on other important markets such as Scandinavia, North America and the Far East.

Activities already underway include:

- 160,000 copies of the new Cornwall and Devon Holiday Planner printed in four languages, along with a Caravan, Camping and Holiday Park map and three themed maps on Arts and Crafts, Gardens and Activities.
- Distribution of print via 11 top consumer holiday shows in Germany, the Netherlands, Belgium, Denmark, Sweden, Austria and Norway.
- Promotion of print by VisitBritain at their offices around the world and by the Britain Your Way E-newsletter targeting Sweden, Finland and Norway.

Other plans for the campaign include:

- Creation of a new searchable and bookable website that will offer itinerary and information searches to help potential visitors plan their stay.
- Development of a thematic approach to its marketing with the focus on attractions such as gardens, arts, crafts and literature, walking, cycling, watersports and other outdoor activities, heritage and culture.
- Working closely with VisitBritain in order to link to their marketing campaigns in Europe. This will include, in 2004, a gardens theme to celebrate the 250th anniversary of the Royal Horticultural Society and in 2005 a coastal and maritime celebration called SeaBritain.

Cornwall Association of Tourist Attractions

Cornwall Association of Tourist Attractions (CATA) is a consortium of visitor attractions. Amongst the tourism marketing activities it undertakes are a website and two publications – an attractions map and a guide to attractions open in the Winter. A number of mining-related sites are featured including Cornish Mines and Engines, Poldark Mine, Geevor Mine, Royal Cornwall Museum, Wheal Martyn, Charlestown Shipwreck Museum, Cotehele and Trevarno. The attractions map is distributed throughout Cornwall and is well established. For instance, it was recently found to be used by 74% of visitors at the 17 attractions taking part in the 2003 Cornwall Visitor Survey.

Cornwall Tourism Forum

Cornwall Tourism Forum was set up in 2002 with the primary aim of ensuring that the public and private sectors in Cornwall work effectively together. The Forum is a partnership of the public sector, including the Cornwall Tourist Board and tourism functions of the District Councils as well as private sector delegates nominated by the Cornwall Commercial Tourism Federation.

The Forum is currently developing a business plan for tourism in Cornwall for the next five years. Recommendations largely endorse existing objectives and tactics contained in the Cornwall Tourist Board Marketing Strategy. However, the plan also has a number of additional elements included. The recommendations include:

- Structural changes to the way tourism is managed, with proposals for the CTF to become the lead body for tourism in Cornwall.
- Development of a County-wide festivals programme.

- Replacing the three databases that currently store and disseminate accommodation information (SWT, CTB, TIC) with a single integrated database that will enable tourism businesses (especially accommodation providers) to input details only once.
- Using the database to develop a Cornwall web portal.
- Allocating public funds to the promotion and marketing of the South West Coast Path.

In addition to the proposal above, the Forum has already mounted a destination campaign aimed at attracting visits during the shoulder months. The campaign develops the theme 'Cornwall – Pure Exhilaration' and uses direct mail and adverts in a range of national consumer publications. These promotions are designed to send people to a free telephone number or a web site (www.cornwall-breaks.com) in order to order a brochure. The marketing materials aim to attract older affluent tourists.

Cornwall Commercial Tourism Federation (CCFT)

The CCFT is the private sector's voice on the CTF. The Federation is an umbrella body for associations across the County. Membership currently represents approx. 90% of trade associations and 30% of the accommodation providers across the County. Much of the Federation's work is channelled through the CTF. For instance the Federation supports the destination marketing campaign run by CTF and backs the web portal development. The organisation also employs a Private Sector Development Manager and produces a bi-monthly newsletter that features tourism developments within Cornwall.

Other organisations

Aside from these organisations, there is a wide range of tourism associations and forums working at a sub-county level. These tend to be made up of a mixture of private sector tourism businesses covering accommodation, attractions and selected retail establishments. Associations can be categorised into two types:

- Geographical areas that are not sector specific. (e.g. Tamar Valley Tourism Association, Heart of Cornwall Tourism Association, Lizard Peninsula Tourism Association)
- Geographical areas that are sector specific. (e.g. St Ives Hotel Association, Falmouth and District Hotels Association)

The work of these associations/forums is diverse but usually includes the production of printed leaflets, provision of on-site interpretation and, increasingly, the development of websites.

By their very nature, the work of local tourism associations is responsive to the tourism assets available in the particular area. As such, there is evidence that where mining heritage is present in the area, tourism associations are making reference to it (e.g. Tamar Valley Tourism Association's website has editorial on the 'fascinating mining heritage' with downloadable 'Days Out' Information sheets on industrial archaeology). However the limited budget often available to these bodies means they lack the resources to develop high profile campaigns.

Mining heritage visitor attractions

Chapter 3 sought to define mining heritage visitor attractions, highlighting a list of 40 sites of potential interest to visitors. This section summarises the marketing activity of a broad cross-section of these sites and looks at them from two main perspectives - the work of bodies that run, own or manage more than one site and those bodies/companies that run an individual attraction.

Organisations running more than one attraction

The National Trust owns and promotes a number of the mining heritage attractions in Cornwall. Cotehele, Godolphin (Estate) and Bottallack Count House are run directly by the NT, whilst Levant Steam Engine and Cornish Mines and Engines have been managed on behalf of the NT by the Trevithick Trust (TT). In addition to its visitor attractions, the NT is also a major landowner within the WHS.

Current marketing of the mining heritage sites is largely done through marketing channels such as NT guidebooks and website. A specific poster campaign to encourage visits to industrial heritage sites within the NT's portfolio has been mounted in association with Wessex Trains. The posters, located at train stations in the County, feature an image of an engine house and remind people that the NT has a wide range of industrial heritage properties.

Consultations with the National Trust suggest that they consider WHS status as a good PR opportunity. The NT is also keen to develop marketing campaigns in partnership with other mining heritage attractions, seeing this as more feasible than the NT developing a specific campaign for its mining heritage attractions.

The Trevithick Trust has been managing a number of mining heritage properties on behalf of the National Trust; Cornish Mines and Engines (NT owned), Levant Steam Engine (NT owned), Tolgus Tin and King Edward Mine. The main promotional tools used to promote the Trust's properties are the 'The Real Cornwall' leaflet and the website (www.trevithicktrust.com). Consultation with the Trust indicates that the future role and scope of the Trust is currently being debated with key stakeholders.

Marketing at individual mining heritage attractions

There is a wide range of mining heritage attractions. Rather than present here the marketing activity being undertaken for each individual attraction, it is felt more productive to present an analysis that relates to a wide range of attractions. Adopting this approach enables trends and themes to be identified more easily.

The analysis derives from the marketing findings of a specially commissioned survey of mining heritage attractions in Cornwall and West Devon³⁰.

- The survey shows that resources for marketing were very tight. The average spend per year was £15,000 with amounts ranging from £150 to £30,000.
- Leaflets and the securing of editorial coverage in newspapers and on TV were the most commonly employed marketing tactics used by nearly all

30 A postal / email questionnaire was sent to around 40 mining heritage attractions in Cornwall and West Devon. The response rate was relatively low so the results should be treated with some caution.

attractions. Websites and adverts in local newspapers were also common tactics but fewer sites used posters as a means of promoting themselves.

- Word of mouth was considered the most effective marketing method, with leaflets and editorial coverage also seen as delivering good results. For certain attractions, road signs were seen as the most effective marketing tool.
- Mining attractions were producing a range of resources to attract and cater for education groups. Most resources were directed at primary and secondary schools rather than further or higher education with activity packs and teachers' notes the most popular provision made by attractions.

In addition to individual marketing activity, a considerable number of the attractions were participating in the group campaigns and research run by Cornwall Association of Tourist Attractions (as referred to in the previous section). A number of the sites also participated in the annual Cornwall Visitor Survey undertaken by Cornwall Enterprise.

At attractions there was some level of monitoring and audience research being undertaken although a lack of financial and staffing resources means that visitor surveys are not conducted as often as managers would wish. This lack of data needs to be addressed in the Outline Marketing Strategy and in the area marketing plans. Lack of knowledge about existing and potential audiences is a major barrier to improving marketing performance.

WHS Bid Project Team

The Cornwall and West Devon Mining Landscape WHS Bid team is currently engaged in a wide range of responsibilities connected with the development of the Management Plan for the Site and for the process of seeking WHS nomination. Up to this point marketing has covered three main facets:

- Website (www.cornish-mining.org.uk). This is a clear and easy to use website that provides a good level of high quality information about the 10 bid areas. The content of the site is focused on the provision of background information rather than the promotion of the WH Site as a destination. The site also does not appear to be functioning as a way of people finding out the latest progress towards nomination. For instance, most areas of the site are up to date but the news page has not been updated for some time.
- Brand Development. The Project Team has developed a logo to raise the awareness of the WHS Bid. The logo features the stylised image of an engine house within the landscape. The logo appears on the WHS website and has also been incorporated onto a number of individual attractions' publicity.
- Public Relations: Various press releases have been issued in order to raise the profile of the WHS process, particularly amongst the local population. A Communication Plan was drafted in November 2003 to correlate PR activity with the identified audiences. The Team has also made a number of talks and presentations to local groups.

4.5 Current marketing – some conclusions

It is clear from the marketing activity featured in this chapter that the marketing strategy for the WHS must seek to dovetail where possible with existing initiatives. Seeking to characterise this activity, there appears to be three different approaches to marketing mining heritage based upon the type of mining heritage product being promoted and whether or not the targets of the campaign are already in the area.

Individual mining attractions are actively promoting their sites through a range of media but have to contend with limited marketing budgets. These constraints mean that efforts are focused on targeting people once they are in the area. There is some collaborative working through organisations such as CATA but not much evidence of cross-marketing between attractions.

Promotion of the wider mining heritage product (including assets that lie within the landscape) is more patchy. The audit of guides and leaflets included as Appendix II shows that the area is well catered for in terms of books aimed at those wanting a detailed knowledge of the area, but with only a few examples of free leaflets or guides aimed at visitors or locals with a more casual interest. Ownership of this wider group of mining heritage assets is more complex with some held by local authorities and others managed by partnerships. Both types of body tend to have very broad remits that are not purely related to tourism or promotion and relatively small promotional budgets. However, it is apparent that many of these bodies have an important part to play (and expertise) in balancing tourism needs against the wider needs of the environment, community and economy. They also represent a significant amount of the mining assets that make up the WHS.

In marketing campaigns aimed at potential visitors prior to their trip to the area, mining heritage receives only limited coverage. This treatment reflects a number of facts, i) that mining heritage is not currently seen a major factor in destination choice, ii) there are uncertainties among tourism officers as to how to communicate mining heritage as part of the overall product offering. This is especially the case given recent moves by those involved in destination campaigns to get away from picturing Cornwall and West Devon as “sleepy” destinations and present them in what is described as a more up-beat and contemporary manner.

There is also evidence that tourism organisations have not been fully integrated within the WHS Bid process. There would seem to be an opportunity and need for more partnership working between the custodians of mining heritage and those involved with promotion and tourism development. The work of Cornwall Tourism Forum with its emphasis on partnership working may provide a suitable mechanism for bringing interested parties together.

5 TOWARDS A STRATEGY

In this section, we turn to the development of the strategic marketing strategy. We consider the strengths and weaknesses and identify an overall aim and specific objectives.

5.1 Strengths, weaknesses, opportunities & threats (SWOT)

A number of key issues emerged from the research and stakeholder workshop. These may best be summarised in the form of the SWOT analysis which is presented in the following two tables.

Table 10 Strengths and weaknesses analysis of Cornwall & West Devon Mining Heritage

Strengths	Weaknesses
Large visitor market	Distance from main SE source market
Significant local market	Local communications
Attractive landscapes	Large, disjointed area
Iconic images	Its "Industrial Heritage"; bleak associations, minority 'anorak' interest
Links to natural environment	"Seen one, seen them all" syndrome
Heritage significance	Some bleak locations/environmental degradation
Authentic, distinctive, original product	Inconsistent quality; mixed bag of attractions
Rich stories	Some attractions in difficulty
Cultural heritage is still alive; music, poetry, art, social history	No large icon attraction
Good range and distribution of attractions	Limited on-site interpretation
Underground experiences	Few related events accessible by public
A range of local museums	Low key promotion in destination campaigns
Community involvement in heritage	Not unique as WHS
Visible product	Diverse ownership and management
Accessible physically	Seasonality of appeal and attractions
	Low awareness of WH Sites

Table 11 Opportunities and threats analysis of Cornwall & West Devon Mining Heritage

Opportunities	Threats
Rising profile of Cornwall	Lack of definition for WHS
Growing interest in industrial heritage?	Lack of co-ordination
TV programmes on industrial heritage Growing interest in environ. improvement	Lack of Involvement (public sector)
Growth in outdoor activity/access to the countryside	Lack of funding
Ongoing environ. Improvement programmes	Lack of investment in quality
Linking industrial heritage with arts/culture	Competition from other industrial heritage areas
The captive market of visitors already there	Competition from other attractions in Cornwall
Potential overseas market (Diaspora)	Sustainability
Merchandise potential (i.e. making things out of tin)	Relies on interpretation which is not always good
Good links with ed. And life-long learning	
Growing the local market	
Potentially exciting product with opportunities to animate	
Modern connections with modern life (where would be without tin)	

The SWOT shows that a key strength of the WHS is that it is located in what is already a popular holiday area. It is also fortunate to have a high quality landscape and strong cultural identity to which mining heritage makes an important contribution. Further positive aspects include the fact that there is considerable investment being made in delivering landscape improvements to areas where mining heritage is a prominent feature.

Some of the key challenges that need to be addressed include the perceived image of industrial heritage as being a minority interest and one that is inconsistent with the messages being communicated through destination campaigns. There also needs to be an acknowledgement that the quality of some of the mining heritage attractions is inconsistent and that some are in a poor financial state. Looking at the current weaknesses of the visitor markets in the area, the key issue is seasonality and the relative distance of the area from the South East market that generates many of the visits to other parts of the SW.

There are also wider issues relating to the nature of the WHS itself. The fact that it covers such a large area and is not one continuous area but is instead made up of 10 areas means that it could suffer from a lack of definition and difficulties in co-ordinating the many stakeholders.

5.2 Aims and objectives

The situational analysis considered in the context of the current marketing environment for the WHS leads to the following conclusions with regard to the vision, aims and objectives of the WHS Outline Marketing Strategy.

The Vision defined for the strategy is:

“to promote the WHS as a distinctive, evolving, living pattern of relict landscapes, encouraging visitors to explore and learn about the physical, social and cultural aspects of the Cornish and West Devon mining heritage.”

Under this general aim, the strategy involves a number of more strategic aims:

- **To increase physical and intellectual access to mining heritage.** The marketing approach should offer the opportunity to promote as wide a range of physical mining heritage assets as possible. The approach should provide appropriate physical and intellectual interpretation of and access to ruined engine houses as much as it does to mining heritage-related visitor attractions. This will bring greater benefits to a wider area and range of communities.
- **To promote the social, cultural and scientific aspects of mining heritage.** It is easy to think about the WHS in terms of the physical legacy of mining heritage remains, but the underlying, unique, geology of the area - the reason for the development of the industry – also needs to be integrated into interpretation and promotion activities. Cherishing and promoting the social, political and cultural aspects of the Site offers opportunities to reach out to diverse communities, including those who have felt excluded from traditional ways of presenting and interpreting heritage.
- **To ensure a co-ordinated approach to interpretation.** It will be important to provide consistent, co-ordinated and high quality interpretation including ‘intellectual access’ to the whole Cornish mining story via the proposed “Key Sites” and to offer locally distinctive stories through promotion of visits to the individual mining-heritage related attractions.
- **To enhance the experience and realise the appeal of the Cornish mining heritage.** Many visitors already enjoy the cultural landscape and the mining related attractions. This strategy must seek to inform and promote the full range of opportunities for these local residents and tourists. Some sites and areas are still unmanaged and/or require maintenance. Promotion must be explicit about the nature and state of the attraction.

5.3 Key principles

Earlier in this report we highlighted the fact that UNESCO’s guidance on tourism in WH Sites stresses that any marketing development takes into account the wider management responsibilities associated with the WHS. For this reason, the outline strategy does not simply seek increases in visitor numbers. Instead the plan is balanced around the following key principles which, in turn, have been integrated into the Site’s Nomination Document.

- **Preserve authenticity and distinctiveness.** Marketing should support the wider objective of preserving the authenticity of the WHS. Product

development Interpretation should reflect the on-going requirement to conserve the Site and seek to communicate the methods and benefits of the approach. The need for enhancement of the visitor experience within the WHS should always be balanced against the needs for the Site's integrity to be retained.

- **To encourage the sustainable development of tourism.** Some of the 10 Landscape Areas or parts of them are more sensitive to the impact of additional visitors than others. This is a function of access and/or site constraints. The emphasis should be on promoting access to the countryside via sustainable means of transport where possible. For sensitive sites, the marketing strategy should focus on promotion to existing users, encouraging them to visit at alternative times and by alternative means of transport rather than seeking additional visitors.
- **To widen the appeal of the mining heritage.** Local residents and industrial heritage enthusiasts will seek out and explore the heritage and many of these will come notwithstanding any marketing strategy. The second objective is to encourage a more diverse and inclusive group of visitors - to convert the uninitiated (locals and visitors) - so that more people are able to appreciate the heritage value of the WHS.
- **To ensure equality of access.** The WHS has an important part to play in ensuring that everyone is able to appreciate and enjoy the WHS. Management and marketing of the WHS should ensure that there is equality of access regardless of ability across all aspects of the WHS. Access should also be seen in terms of active engagement with communities and individuals who suffer from social exclusion.
- **To seek increased economic benefit from visitors not necessarily increased numbers.** The cultural landscape with integral mining heritage can be used to increase the economic benefit derived from visitors. This in can and should aim to benefit the local community and to help sustain the mining related landscapes and individual attractions. However, as the EIA for the site highlighted, environmental sensitivities meant that in some Landscape Areas it is not desirable to seek an overall increase in visitor numbers.
- **To provide a marketing strategy that is flexible and usable for all interested parties.** It is important that the marketing strategy offers an approach that can applied by a wide range of private and public stakeholders. Key to achieving this concept is scalability. This means that a local accommodation provider with one mining heritage asset near to them should be just as able to use the marketing approach as a District Council or County Council with many hundreds of assets within their administrative boundary.

6 SEGMENTING THE MARKET

Cornish mining heritage and potential WHS status will have a diverse appeal so it is important to refine the marketing approach through targeting specific types of consumer who would be most interested in what the WHS offers and/or those to whom the WHS wishes to reach.

Market segmentation is based on the recognition that various market segments behave differently with respect to travel and tourism. In the light of the strategic objectives, the aim is to focus on the most important segments in terms of scale/value and ease of reaching that market. There is a wide range of ways to segment the market e.g.:

- 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.
- Usage segmentation refers to the frequency, regularity or type of usage (e.g. day visitors, long holidays).
- Activities (e.g. shopping, outdoor activities, nightlife, events).

The potential segments are described in detail in Appendix IV. This chapter presents a list of prioritised market segments that are drawn from all four major types of segmentation listed above.

6.1 Target market prioritisation

The identification of priority segments has been achieved by 'scoring' segments according to a number of criteria. These include a review of existing data on visitor patterns in the region and by reference to relevant market information for each segment. Another facet of the evaluation of market segments has been the extent to which they satisfy the range of strategic objectives. The 10 WHS Landscape Areas have a complex range of aims and objectives that result from the plethora of organisations, businesses, bodies and individuals that possess a stake in these areas. In addition, there are the over-arching aims and objectives developed as part of the bid for WHS status.

In attempting to prioritise the target markets, an attempt has been made to synthesise market-based assessments with a values-based rating based upon a number of criteria that are listed below.

- Spend per head: Figures for average spend per head per night have been calculated using a variety of statistical sources (e.g. UKTS, MINTEL, Cornwall Visitor Survey, Market reports). These figures have been converted to a rating scale to allow comparison with other measures.

- Total volume: Some of the segments represent small niches whilst others are mainstream, high volume markets. Niches will score lower on this measure than high volume markets. (Volume relates to overall spending values)
- Competition: The extent to which there is extensive competition to attract a particular segment. A rating of 1 would indicate lots of competitors, whilst 5 would reflect a more specialised market with fewer competitors.
- Attitudes: This refers to segments that already are, or can be encouraged to, respect the need to preserve and protect the assets that are included in the WHS bid areas.
- Social Inclusion: This rates the propensity of segments to offer the potential to increase the economic prosperity of the WHS bid areas and in particular those areas that currently suffer from social deprivation.
- Stakeholder priority: The extent to which the segment is a priority of stakeholders in the WHS area. This score is largely the result of a market prioritisation conducted at a stakeholders' workshop held during the preparation of this strategy.
- Sustainability: A key facet of marketing plan is to develop forms of tourism that are sustainable, both in terms of their impact on the environment but in terms of securing the future viability of a broad range of businesses and organisations.
- Re-profiling Visitor Trends: Some segments can help address some of the key strategic challenges facing tourism in Cornwall and West Devon (such as the current high level of seasonality and high reliance on the long holiday market).

Each segment is scored from 1 to 5 with 1 being the lowest rating and 5 being the highest. The average rating across all the criteria is then calculated.

Table 12 Segment matrix

	Spend per head per night	Relative scores for segments								
		Spend per head	Total volume	Competition	Attitudes	Social / Inclusion	Sustainability	Stakeholder priority	Re-profiling	Average
Day visitors / local residents	£22	2	4	3	3	5	3	3	4	3.4
VFR	£33	3	2	2	4	4	4	4	4	3.4
Domestic long holidays	£35	3	5	4	2	4	3	1	1	2.9
Family lifestage										
Pre-family holidays and breaks	£57	5	2	1	1	2	1	2	2	2.0
Family holidays and breaks	£36	3	4	2	1	3	2	1	1	2.1
Post-family holidays and breaks	£38	3	4	3	4	2	3	2	3	3.0
Overseas Markets										
Germany, France & Ireland	£39	3	1	2	2	1	2	3	3	2.1
Activity and special interest breaks										
Mining enthusiasts	na	3	1	4	5	1	3	1	2	2.5
Culture / Heritage Tourists ¹	£49	4	3	2	4	2	4	5	4	3.5
Cycling ²	£38	3	1	3	3	2	3	5	3	2.9
Walking ³	£46	4	3	3	3	3	5	5	4	3.8
Ancestral Tourists (UK & Overseas)	£45	4	1	4	4	2	3	5	4	3.4
Educational Groups										
Primary and secondary	£18 est.	1	2	2	4	3	4	4	4	3.0
Further and Higher	£20	1	1	3	4	2	4	4	4	2.9
Lifelong learning	£35 est.	3	1	3	4	2	4	3	4	3.0
Psychographic Segments⁴										
Traditionals	£37 est.	3	3	4	3	3	3	-	3	3.1
Cosmopolitans	£45 est.	4	3	1	1	2	2	-	2	2.1
Discoverers	£37 est .	3	2	2	3	3	3	-	3	2.7

Notes: 1. Spend figures for heritage / culture tourists relate to holidays where visits to heritage attractions are part of a holiday rather than the main purpose; 2: Spend figures relate to holiday cycling (i.e. cycling whilst on holiday) rather than a holiday where cycling is the main purpose; 3. Spend relates to those walking whilst on holiday; 4. Spend figures for psychographic segments have been estimated by comparing the share of the long and holiday market information for each segment with the total market within the South West.

Taking into account the scores for each segment contained in the matrix above, the segments have been prioritised under two broad headings; primary and secondary. Primary segments should be seen as management priorities for the period 2005 – 2010. Secondary segments should be addressed over a longer time-frame.

Primary market segments

These represent the segments that offer the best strategic match between market potential and their relationship to the proposed WHS.

Culture and heritage tourists

The visitor profile of cultural / heritage tourists fits well with the aim of attracting high spending visitors out of the main peak season. The segment analysis (Appendix IV) highlights the fact that many culture / heritage tourists are from the ABC1 socio-economic groups. In terms of further refining the market to target, the older element of this segment (55+ empty nesters) is more attractive than the 35-44 year old sub-segment as they have no children at home and so are free to travel outside of the main peak season.

In motivational terms, cultural or heritage tourists are likely to be responsive to the qualities and themes conveyed within the proposed WHS. Few cultural tourists will have anything other than a cursory knowledge of Cornish Mining, but they are likely to possess a desire to find out more about the subject. It should be stressed that even within this positively disposed segment, industrial heritage in Cornwall does not have the same level of awareness as other cultural aspects such as historic houses and gardens.

The Arts (and contemporary crafts) also have an important role to play as other areas of the UK have had success in using art to link raw materials with their extraction. For instance, the Portland area of Weymouth, famous for its Portland stone quarrying, runs sculpture workshops within the quarry setting. A similar approach within the Bid Areas could be developed with artists using tin and copper.

Walkers

The WHS product is the landscape and access to it. Cornwall and West Devon has a wide range of fine short and long distance footpaths and trails, some of which have a national and international profile (e.g. South West Coast Path). The density and geographical spread of mining heritage assets within the bid areas means that there is a public right of way near to most.

In terms of market size, walking is 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. Its importance in Cornwall is even greater with The Cornwall Visitor Survey showing that over half of all visitors plan to do a coastal walk whilst on holiday and just under 40% are looking to walk in the countryside.

As the main purpose of a holiday, walking ranks as the most popular 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 £868m³¹.

Given these factors, the development of walking is considered a high priority.

³¹ See ref 6

Ancestral tourists

Ancestral tourism is enjoying rapid growth worldwide and is particularly strong in other parts of the UK such as Scotland and Ireland. The segment assessment outlines the fact that ancestral tourism is still in its infancy in England. However, the WHS Bid Areas are in a position to be at the forefront of the development of this tourism segment in England due to a number of factors:

- There is a growing awareness and appreciation of ‘Cornishness’ as exemplified by the success of events such as Dehwelan and the activities of CERES.
- The large size of the Cornish Mining Diaspora (6 million around the world).
- The Bid Areas have a strong portfolio of family and mining archives.
- Some attractions within the bid areas have already started to look at building on this market (e.g. the feasibility study for an emigration centre at Morwellham Quay).
- A recent national report into heritage tourism identified regional indigenous communities in general and Cornish communities specifically as neglected and underdeveloped aspects of the heritage market.³²

These strategic advantages combine well with a number of the strategic objectives outlined in the Cornwall Tourism Strategy. Specifically, the overseas element of this market segment is a good example of a high spending overseas market and one where the special nature of Cornwall and mining as an activity in which their ancestors were engaged will be valued. The following specific markets have been targeted:

Overseas – USA

The US represents the largest single overseas market in the South West and Cornwall and is one of the priority target markets for overseas marketing consortium, DACOM.

Overseas visitors – Australia

Australia accounts for 7% of all overseas visitors to the South West region. This makes it a smaller overseas market than the USA, Germany, France and Ireland. However its importance relates to the fact that 40% have strong family ties and are visiting friends and relatives. There is also a good meshing between the older Australian’s interest in culture and heritage and the mining heritage offering which forms the basis of this strategy.

UK-based ancestral tourists

There are a large number of people of Cornish descent living in the UK. The North East of England is one area that has been highlighted as having a high concentration. Experience from Scotland suggests domestic ancestral tourists should

³² *Heritage Tourism in the UK – A Glance at Things to Come*, Insights. , English Tourism Council, May 2002

not be overlooked. For instance a recent report found that 90% of ancestral tourist visits to Scotland in 2001 were from the UK.³³

Day visitors/local residents

The market segment assessment highlights the relatively low numbers of the local resident population visiting mining heritage attractions. This contrasts with the national picture for such sites that shows that residents make up ½ of all visitors. Although this may be to do with the scale of the visitor market in relation to the host community, there are considerable advantages to stimulating the day visit market amongst the local population. Amongst these are:

- The local population is already a heavy user of assets that allow more informal access to the countryside and mining heritage (e.g. walks and trails).
- They constitute a year-round market and act as hosts for the large VFR market that is attracted to the area. Any increase in engagement with the host population is likely to have a positive knock-on effect to the VFR market.
- Encouraging more local people to engage with mining heritage (particularly those with recent or past links with the industry) provides a chance to use tourism to address issues around social inclusion.
- Promotion to the local population acknowledges the importance of, and provides a primary function for, the social and political aspects of mining heritage (e.g. oral history, events, poetry, art, reminiscence).

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). The segment has a number of attributes that make it an attractive proposition. These include the fact that VFR:

- Visits occur more evenly across the year than holiday trips.
- Are 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 VFRs are from ABC1 socio-economic groups.
- There is a fairly evenly spread across the age groups but some skew towards younger age groups.

Locally, estimates for the importance of the VFR segment range from between 11%³⁴ and 21%³⁵ of tourism trips in Cornwall. Forecasted growth in the South West is expected to be in the order of 71% between 2001 and 2011³⁶.

³³ *Ancestral Tourism in Scotland*, Ancestral Tourism Industry Group, 2003

³⁴ see ref 8

³⁵ see ref 6

³⁶ *Ibid.*

Education and Lifelong Learning

The seeking of WHS status for Cornwall and West Devon's mining heritage obviously reflects what is already regarded as a world-class range of assets relating to mining heritage. These assets and the social history that surrounds them provide the opportunity to tell the story of this important industry in a myriad of ways.

Educational groups from primary and secondary schools are likely to be a responsive audience for these stories. The themes associated with Cornish mining can easily be linked into subjects included in the National Curriculum. For instance, pupils being taught History at Key Stage 2 (ages 7-11) are required to study local history whilst Key Stage 3 includes the study of British History between 1750 and 1900.

At a local level there is a particular opportunity to link up with Cornwall Local Education Authority's *Sense of Place* initiative. This aims to give Cornish school children a strong sense of their local culture and heritage. A number of cross-curriculum units have been developed, one of which is called Tin and explores the impact on the industrial revolution on Cornish tin mining communities.

Other reasons for identifying educational groups as a priority market include the fact that:

- It provides a good fit with the Vision and Aims set out for the proposed WHS in its Management Plan.
- Local educational groups are already a feature at mining related attractions in the area but it would seem from national statistics that there is scope for the development of this market at a local and regional level.

In addressing the education market, it is proposed that an education strategy be developed that identifies the needs of primary and secondary school markets. and develops distinct approaches to meeting these.

The mining heritage assets that comprise the 10 bid Areas, also provide opportunities to the growing further and adult education sectors in the region. The scope and variety of the WHS themes relate to a wide range of academic subjects, including history, geology, arts and engineering, as well as links to more vocational courses, such as tourism or heritage management. These factors already build upon the world-wide reputation the area's mining heritage enjoys amongst courses relating to mining, industrial history and regional studies.

In addition to the formal adult education sector, mining heritage assets can also be a valuable resource for those seeking more informal, self directed learning opportunities, for example through the exploration of local and family history. Raising awareness of these assets could contribute to greater use of them by local residents. This segment overlaps with the cultural and heritage tourist segment. What distinguishes it from the latter is the manner in which the learning is gained.- lifelong learning tends to involve an educational establishment of one sort or another. As is the case with the Further and Higher Education segment, the Combined Universities in Cornwall project offers some scope to develop this area.

Developing these educational markets is also consistent with the Management Plan aims for deriving economic benefits for local communities from the proposed WHS. Together with the formal schools-based audiences, the education strategy should address how to develop the lifelong learning opportunities through partnerships with existing providers.

Traditionals

This is one of the five psychographic segments identified as being significant for the South West by South West Tourism.

The *Traditionals* segment is a mainstream 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. *Traditionals* tend to be the older members of the mass market. Around half are aged 45-65. A third are post-family, and a further 40% are retired.

They are considered a primary target for a number of reasons. Firstly, Devon and Cornwall are amongst the most popular destinations for this group. Secondly, they are also likely to respond favourably to a heritage-orientated campaign as they enjoy visiting attractions, museums, galleries, gardens, churches and historic sites.

Domestic long holidays / Family holidays and breaks

Domestic long holidays / family holidays and breaks are two broad segments that have been combined here as one target market. This decision has been made because there is a very considerable overlap between the two, with families dominating the domestic long holiday market.

These segments combined form a very large market and are the mainstay of Cornwall and West Devon during the peak season. Domestic long holidays account for 48% of all holiday trips during the year, whilst family holidays account for 40%. In terms of nights and spend the impact of long holidays is even greater, accounting for 70% and 66% respectively.

Although forecasts indicate a decline, the sheer scale of these two segments means that even if only a small percentage of these markets can be encouraged to engage with mining heritage, it will greatly assist in meeting objectives. In addition, we have seen that local mining heritage attractions are heavily reliant on tourists and as such they cannot afford to turn their back on this market.

Identifying this segment as a priority market will also be useful when the WHS wishes to engage with stakeholders from the wider tourism sector including private sector operators and tourism officers at a local authority level. This is because a considerable amount of current marketing resources is targeted at this group of visitors.

Looking at long holidays by lifestage it is the post-family long holiday market that shows most potential for growth out of season (see below).

Lifestage (post-family holidays and breaks)

The post-family holiday and short breaks segment was identified above as one of the parts of the 'general' holiday market that looks set to offer growth outside of the main peak season. For this reason it is an attractive market for the Bid Areas, especially given the highly seasonal nature of the Cornwall holiday market.

The segment is already favourably disposed towards Cornwall and Devon and values the counties for their distinctiveness. Many of the main requirements -scenery,

gardens, good food and drink and the presence of serviced accommodation, can easily be catered for.

Priorities for the first five years (2005-10)

Additional resources and strategic alliances will be needed to develop specific campaigns and promotional activities geared towards these primary target audiences. It may not be possible to address all of the above primary target audiences within the next five years. In view of their particularly strong association with the broader cultural, social and economic aims for the proposed WHS, the priority target markets should be

Cultural/heritage tourists

Ancestral tourists

Walkers

Local residents

Education and lifelong learning

Secondary market segments

Mining / industrial heritage “enthusiasts”

This segment can broadly be defined by a high level of interest in mining heritage and broken down into the following groups³⁷.

- 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.

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 visitors³⁸. 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.

³⁷ see ref 32

³⁸ United Kingdom Tourism Survey, 2002.

For industrial attractions, it is clear that the enthusiasts provide a more important market than for general visits to an area. However it is considered that industrial heritage enthusiasts will be drawn to the area and specific attractions anyway due to their knowledge of what is on offer. As such the segment is identified as a secondary segment to which no active promotion is planned within this strategy framework.

Cycling

Cycling is an attractive market but a smaller one than walking, which is listed as a priority market segment.

Figures from UKTS³⁹ show that 1m cycling holidays (where the primary purpose of a holiday is cycling) were taken in 2002 generating £174m. Holiday cycling (where cycling is an activity on a more general type of holiday) 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 Survey⁴⁰ indicated that 5.9% of visitors were looking to cycle whilst on holiday.

The main markets within the WHS are considered to be holiday cyclists and cycling day visits (where people travel from home). Families are the main market for holiday cycling and the main demand in terms of routes is for traffic-free paths. Commonly used routes are disused railway lines, forest roads and rights of way such as byways or green lanes.

Chapter 3 highlighted a range of initiatives that have led to, or will lead to the development of off and on-road cycle routes and multi-user trails. In addition, we have already identified that holiday cycling is largely stimulated by the demand for off-road trails. These factors, coupled with the product approach being advocated in this strategy, provide a strong argument for the active development of this market.

Overseas visitors – Germany, Ireland, France

The German, French and Irish markets show some growth potential and represent good candidates for general development. It is felt however that the theme of the WHS offers little in the way of promotional opportunities that warrant active promotion. As with other segments identified as secondary, there is an opportunity 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.

Lifestage (pre-family holidays and breaks)

The pre-family lifestage consists of the under 35 year olds with no children. It is a group that is highly likely to holiday abroad (75%). In the South West, the segment accounts for 15% of the holiday market 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 that are likely to see greatest numbers from pre-family lifestage. The scenery, which is a draw for many visitors to Cornwall and West Devon is appreciated but not the main draw for this segment.

³⁹ United Kingdom Tourism Survey, 2002

⁴⁰ see ref 8

Cosmopolitans

This is one of the five psychographic segments identified as important for the region by South West Tourism. *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.

They are considered a secondary market rather than primary because their motivations are less clearly aligned with the natural and cultural assets of the WHS. For instance, this segment favours cities as a destination for a short break. In addition over a quarter are pre-family, a group that we have already learnt look for lively rather than scenic locations.

However, balancing these traits, a further 38% are post family and a quarter is from AB socio-economic groups. They also 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

As was the case with *Cosmopolitans* (see above), *Discoverers* is one of the psychographic segments derived by South West Tourism.

Many of the attributes of this segment offer promise for the WHS marketing strategy. They make up 13.8% of the short break market and 11.3% of the long holiday market. This group is 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. However the segment's potential is limited by their relative disinterest in arts and culture. As such, campaigns drawn up for the WHS would have to work hard to 'engage' this segment.

6.2 Summary of market segment priorities

The table below presents a summary of the market segments to be targeted in this Marketing Strategy.

Table 13 Summary of Market Segment Prioritisation

Primary Markets	Secondary Markets
Culture and heritage tourists	Industrial heritage / mining enthusiasts
Walkers	Cycling
Ancestral tourists (overseas & UK)	Further and higher education groups
Day visitors/ local residents	Life-long learners
Education and Lifelong Learning audiences	Overseas visitors (Germany, France, Ireland)
Visiting Friends and relatives	Pre-family holidays and breaks
Traditionals	Cosmopolitans
Domestic long holidays / family holidays and breaks	Discoverers
Post-family holidays and breaks	

6.3 Segmenting the market – some conclusions

Although the WHS Management Plan has a life-span of 30 years, the Nomination document acknowledges that there are a series of management priorities for the next 5 years that relate to the nomination process and establishment of the WHS.

In order to reflect this dual strategic horizon, It is envisaged that secondary markets will be developed throughout the life-span of the Management Plan (30 years) but that the priority over the next 5 years will be the primary segments identified in this chapter, with a particular focus on the first five priority target audience groups.

The next chapter looks in detail at the strategic and specific approach that should be adopted to reach these priority audiences. However, it is clear that in general terms addressing such a broad range of targets will only be possible through the adoption of co-ordinated working and by maximising the use of existing tourism campaigns. It is also clear that activities other than marketing such as outreach work will play an important part in reaching markets such as local residents, VFRs and the education markets.

7 THE OUTLINE MARKETING PLAN: KEY PRINCIPLES

This section is split into four sections. The first part looks at the key strategic approach to marketing within the WHS. The second part develops an over-arching interpretative framework to assist in presenting the WHS to its various target audiences. The third section deals with the marketing approach for primary market segments whilst the fourth section examines some of the key marketing issues that relate to all segments including the branding of the proposed WHS.

7.1 The landscape as the Cornish mining heritage product

In relation to the visitor markets reviewed, the promotion of the specific mining heritage sites as a group or consortium of attractions will have appeal to the industrial heritage market and some other closely defined groups.

The main opportunity, however, is going to be in focusing on the external qualities of this cultural landscape as a product, where the industrial heritage and its effective interpretation adds value to the inherent natural resource of the countryside. Mining heritage should be marketed and interpreted as a cultural activity with a range of landscape settings and impacts. We see a number of benefits to pursuing this approach:

- It will enable the WHS to capitalise on the much larger market of visitors already in Cornwall and West Devon, a large proportion of whom have a general interest in exploring the countryside – as well as those with more specific sightseeing interests.
- The inherent qualities of the 10 Landscape Areas already represent specific attractions. The countryside is already an important draw for visitors to Cornwall and Devon. Many of the Landscape Areas overlap Areas of Outstanding Natural Beauty including St Just, Tamar Valley, Bodmin Moor, St Agnes and a number of sites are located on the South West Coast Path, including parts of Heritage Coast. (Most industrial heritage sites are relatively robust and can withstand any likely increase in visitor numbers. Some specific parts of these Landscape Areas however may prove sensitive to the impact of additional visitors and may need to be downplayed in promotion.)
- It not only appeals to a much wider audience, albeit indirectly, but also represents the best opportunity to inform visitors and local residents uncommitted to the value of the mining heritage; a key objective for the WHS.
- The model is based free access to the majority of the WHS. As such, it encourages access by all sectors of the population including local residents and those groups who traditionally suffer from social exclusion.
- The model encourages access via sustainable modes of transport such as walking and cycling. It achieves this not through coercion but by ensuring that the quality of the visitor experience is highest when accessed via these means.

- It works at different levels and for a variety of participants. Access to the interpreted mining landscape can be developed at an Area level but also at the level of a local community or individual attraction. Visitors to a small village could follow a local trail or attend a local event and discover something of the local heritage. A good example is presented at Cotehele where visitors may well have come to visit the house and/or gardens but on taking one of the walks will come across interesting mining heritage.

Key to the success of using the landscape as the mining heritage product will be the quality of interpretation of the mining heritage to those visitors in the countryside.

As has already been stated, it lies outside the brief of this study to develop a comprehensive interpretation strategy. However it is appropriate that the Outline Marketing Strategy offers a framework within which a detailed interpretation strategy can be formulated.

7.2 Interpretative Framework

The interpretative framework for the WHS comprises three main elements. Taken together, these provide the ‘intellectual access’ referred to in Chapter 3.

- On-site interpretation within the landscape
- A network of local centres
- “Key Site” centres

7.2.1. On-site interpretation within the landscape

There are thousands of mining related archaeological remains within the proposed WHS. In order to open up access to these and other assets, the focus should be on first class, site-sensitive (often low key) on-site interpretation - e.g. signposting, waymarked trails and routes for all means of transport with related self-guided and guided trails, information points, public art etc that adds something, informative and qualitative, to the countryside experience⁴¹.

In the same context, local social, cultural and artistic events and other informal activities will have an important part to play. These often represent the best way for visitors to understand the role of the local community and the social heritage of the WHS.

Interpretation of the mining heritage, for and by the local community, is crucial for many sectors of local society and is already quite extensive in Cornwall, if not promoted to visitors⁴². There are often important local sensitivities to respect but the WHS gives an opportunity to assist local groups and to help sustain local activities by drawing a larger audience and, where appropriate, it can provide a rare experience for visitors to the area. This resource will need to be carefully integrated into the detailed interpretation strategy, subject to consultation with local groups.

⁴¹ Appendix II shows the extent of existing self-guided trails and outdoor site interpretation.

⁴² There are many local groups associated with local mining heritage e.g. Carn Brea Mining Society, John Harris Society. There are close associations between local arts and the mining heritage.

7.2.2. A network of local centres

The attractions have an important role to play in adding this qualitative value as centres of interpretation and further information for those with a deeper – or stimulated – interest in the WHS mining heritage. The on-site information has an important role to play in directing visitors to these facilities.

Local centres, therefore, will tell a local story, present a specific theme or exhibit a specific collection. They will focus on local distinctiveness and will need to be integrated into local interpretative plans as well as having their own interpretative plans. Interpretation planning toolkits could be provided for selected centres which might include common stories related to mining in the WHS.

Given the number and variety of attractions, we envisage most of them having a role as part of a network of ‘badged’ local facilities to which the visitor can be signposted should they want more detailed information on the local area or on a special theme. Some of the identified centres such as Trevarno Gardens, the Shipwreck Centre and Wheal Martyn where the WHS mining theme is subsidiary may need to be promoted in a different way.

Ideally, this network will involve a wide variety of facilities, arts and heritage events and other local activities, extending beyond the 40 visitor attractions identified and incorporating local events and activities (see above) A specific objective should be to encourage active, personal interpretation enabling visitors to interact with local people where possible.

Given the variety of potential facilities and interpretative foci, quality will be important and is currently variable but it will be difficult and probably inappropriate to set a large number of fixed criteria for involvement at this stage. Indeed there may be some value in having a flexible, transient list of centres. An onerous ‘entry-level’ could discourage local involvement. It is recommended that applications be invited from mining related facilities, events, groups etc and that these be considered on an individual basis. The emphasis should be on reaching basic standards that ensure the WHS is interpreted in an appropriate way. If required help should be provided to assist applicants in reaching quality standards. Badging would be part of this assessment and reinforce the Cornish Mining ‘brand’.

7.2.3. “Key Site” centres

Within this network of local centres, there should be ‘intellectual’ centres to which visitors can be directed should they want to gain a comprehensive overview of the over-arching WHS story and/or to explore any mining heritage issue in more detail. This facility would serve both the dedicated enthusiast and the newly ‘converted’. They would also be focal points for a formal education service related to the WHS.

Given the scale of the WHS and the wide geographic distribution of visitors across Cornwall and West Devon, there needs to be more than one centre. In order to help define appropriate centres and to make sure they provide an appropriate service, it will be very important that these centres do meet certain criteria.

A WHS “Key Site” will need to:

- Be open all year;
- Be authentic;

- Be attractions in their own right, i.e. of sufficient scale for a 2-3 hour visit with inherent appeal;
- Interpret the local area AND have high quality interpretation of the Cornish Mining heritage on a county-wide basis;
- Have suitable education facilities;
- Act as an orientation centre to the rest of the WHS ie advising visitors on how to access different parts of the site;
- Be well located in relation to the Landscape Areas (with links into it);
- Be accessible for visitors (including by public transport);
- Have a range of visitor facilities including good catering, retailing, toilets, parking etc;
- Have high quality in service terms; ideally accredited by VAQAS or similar;
- Have sufficient capacity to take additional visitors;
- Have long-term support from owners/trustees and commitment to the WHS concept; and
- Have an adequate marketing programme of its own.
- Agree to co-operation and cross-marketing in pursuit of effective implementation of the WHS marketing strategy.

It would also be desirable to have centres in:

- Different Landscape Areas to provide variety; and
- Located in the west, east and centre of the WHS to be accessible to the maximum number of people.

Bearing in mind these criteria, it is recommended that Geevor Mine is developed as the Key Site for the west of the WHS and Morwellham Quay as the Key Site for the east. A third Key Site should ideally be in the Camborne / Redruth area to reflect the fact that this has traditionally been the focus of mining. However, cases can be made for a number of sites in this central area:

- The Discovery Centre is in Camborne and already has excellent interpretation but its poor surroundings create a problem
- Robinson's Shaft is also well located with major development plans but is still in planning stage;
- Poldark Mine is the best known mining attraction and offers an underground experience and good interpretation but is set within a leisure attraction which has significant elements unrelated to mining; and
- Godolphin House and Estate could offer a quite different form of gateway, focusing on the social aspects of the mining heritage.

In addition, there is a strong argument for involving the Royal Cornwall Museum as a Key Site. Unfortunately it is not in the WHS, but Truro is the focus for many visitors who will naturally turn to the major museum in the Region for an understanding of any aspect of the county’s heritage.

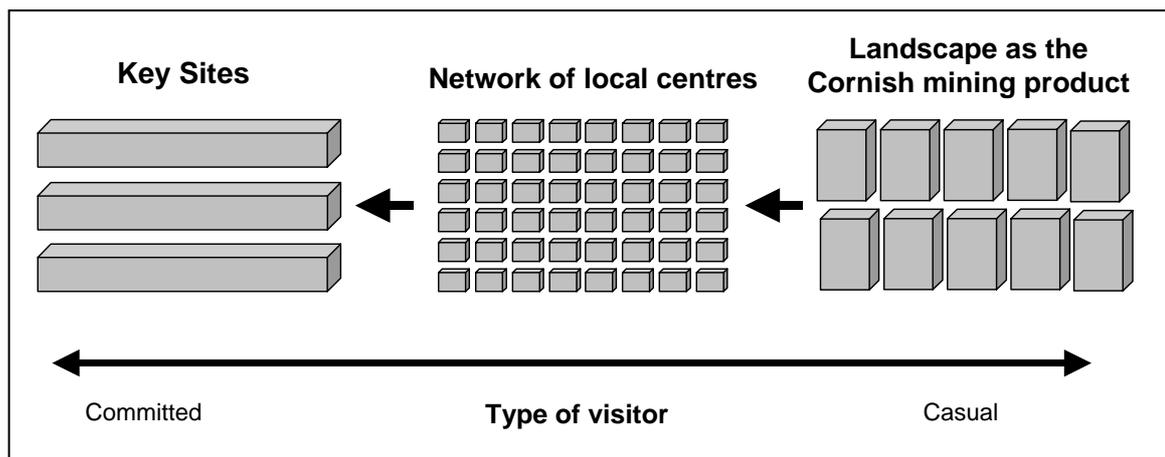
The choice of the central Key Site(s) should be the subject of a further option appraisal.

Once selected, the “Key Sites” will need to prepare co-ordinated interpretation strategies. Much of the interpretation will be common across the Key Sites, which will facilitate implementation. However, each will have its own strengths which will need to be capitalised upon along with the presentation of local stories.

7.2.4. Summary of interpretative framework

The interpretative framework set out in this section provides a coherent way in which to present the WHS to a wide range of target audiences. The diagram below represents a visual summary of the approach and shows which facets are likely to appeal to which type of visitor.

Diagram 1 Summary of Interpretative Framework



7.2.5 “Preview” facilities

In addition to developing a framework for the detailed interpretation of the various mining heritage related themes and stories, opportunities to raise awareness about the WHS and its interpretation facilities for potential visitors, and information on how to access these, will be needed. This “preview” role could be performed by a range of different facilities, eg tourist information centres, roadside services, bus and train stations, in a range of locations, -both within and outside the proposed WHS.- placed on the main transport routes and/ or urban centres in the Cornwall and West Devon region. They will perform an important promotional and visitor management function, in addition to supporting the interpretation framework.

7.3 Marketing approach to market segments

The following section is split into two main parts. The first outlines approaches to reaching specific segments that are most effective and efficient, whilst the second part details the specific marketing approach for each of the individual segments highlighted as primary market segments.

7.3.1. Strategic approach to addressing market segments

The approach advocated for reaching specific target markets has two basic priorities:

- Partnership working to enhance or refocus existing tourism campaigns rather than the development of new, specific campaigns.
- Promotion to visitors within the County rather than prior to visit.

The rationale for this approach is anchored in pragmatism. There are insufficient resources to allow the active promotion of the WHS Bid Areas to all market segments. The development of new specific marketing campaigns is focused on those segments that promise most return and where there is little marketing currently undertaken.

Partnership working to enhance or refocus existing tourism campaigns is an acknowledgement that marketing of the WHS needs to be placed within the wider context of the on-going tourism marketing that takes place at a parish, district, county, regional, national and International level.

7.3.2. Specific approach to addressing market segments

The following section provides the specific approach for each of the individual segments highlighted as primary market segments. The marketing approach advocated for secondary market segments is included as Appendix V.

Each market segment also contains suggested marketing objectives. It lies outside the scope and remit of this plan to develop a range of costed and fully evaluated tactics however we feel that it would be useful to also include in each segment some suggested tactical approaches.

The marketing tactics should not be seen as exhaustive but merely an indication of how marketing to each segment could be translated into practical campaigns. Initiatives included here could be 'fleshed out' during the next stage of marketing development. Some comment on how the strategy and the tactics suggested below should be implemented is included in Chapter 8.

Culture and heritage tourists

The two main marketing objectives for this segment are to raise the awareness of the mining heritage and to widen its appeal. These are pre-requirements because mining heritage will vie for the attention of heritage and cultural tourists along with attractions that traditionally have higher levels of awareness and visits (e.g. gardens and historic properties).

There is a need for the marketing approach to this segment to reinforce the relevance of mining heritage. There is also a need for the marketing approach to

differentiate between the place-centred heritage tourism and cultural tourism that covers a wider range of aspects such as poetry and art. Amongst the approaches that are suggested are:

- Encourage organisations producing destination guides to feature relevant images and text about mining heritage.
- Work with organisations such as the National Trust to raise the profile of mining heritage sites within its property portfolio.
- Promotion of local walking and cycling trails.
- Develop programme of walks and cycle rides led by experts that uncover aspects of the mining heritage.
- Use the social, artistic and political aspects of mining heritage to engage with this segment in a broader cultural context.
- Co-ordinate, develop and promote craft and sculpture-based use of tin and copper. Craft workshops, contemporary art fairs, travelling exhibitions are all ways to link raw materials with their extraction.
- Develop and promote arts events that explore mining heritage (e.g. art, drama, theatre and film).
- Focus on people and key individuals involved in the industry.
- Interpretation should not be afraid to tell the 'hard' side of the Cornish mining story (e.g. hard working conditions, poverty, the decline) but should also celebrate other aspects (e.g. what ex-miners in the local community now do, the powerful physical and social legacy).
- Improve and promote mining-related interpretation and facilities at historic home and garden visitor attractions that have links to the mining industry (e.g. Godolphin House, Trevarno Gardens, Cotehele House & Quay). A special "roving" programme of guided tours at these attractions that uncovers the mining links might also be worth investigating.
- Commission an official guide to the WHS. Consideration should be given to working with a commercial publisher in order to secure good distribution in shops and TICs.

Walking

Marketing programmes should seek to focus on those wishing to walk whilst on holiday. This is a far larger market (24% of visitors) than those on walking holidays (5%). Key to effective development of the market is to integrate the promotion of trails and footpaths with tourism promotion at a district and borough level. Possible tactics to be pursued include:

- Inclusion of photos of people walking past engine houses for use in destination guides.
- Inclusion of mining heritage in existing walking leaflets.
- Re-branding of local footpaths to mining heritage theme.

- Development of area guides that feature both public rights of way and mining heritage.
- Provision of design templates and mapping service for local parish council interested in developing guides that promote walking access to mining heritage.

Ancestral tourism

The majority of stakeholders in the area lack the resources to tackle the overseas aspects of the ancestral tourism market on their own. As such, there is a need to work with agencies that already target those overseas markets that have large numbers of people from Cornish mining descent.

Possible ways of working include:

- Work with DACOM on developing ancestral tourism campaigns to the USA and Australian markets.
- Work with CTB to develop an ancestral tourist component of their Objective 1 -funded marketing campaign.
- Develop a web-based portal to local family records resources.
- Identify geographical concentrations of those with Cornish ancestry in USA and Australia in order to improve targeting of campaigns.
- Develop a web-based campaign and search engine campaign to ensure that those seeking information on tracing their roots in Cornwall are encouraged to visit Cornwall.
- Work with archives and family record centres to develop tourism services such as accommodation packages with local providers of B&B and hotel accommodation.
- Form partnerships with organisations in Cornwall (e.g. the Cornish Migration Project at the Institute for Cornish Studies), the US and Australia already involved in promoting Cornish links and tracing family roots.
- Link ancestral tourism with the VFR campaign, i.e. hosts inviting US and Australian relatives to stay.

Day visitors/local residents

Possible tactics for this market segment include:

- Promotion of local walking and cycling trails.
- Animation of the story of Cornish mining through live interpreters, miners' guided tours, audio visual, events.
- Support and active participation in local community events which have mining as a theme.

- Active participation of mining-heritage attractions in the national Heritage Open Day initiative.
- Creation of an events fund for community events that celebrate aspects of mining.
- Active development, along with others such as Cornwall Arts Marketing, of projects that encourage the local population to visit attractions (e.g. Be a local tourist).

Visiting friends and relatives

Marketing efforts should concentrate on the hosts resident in Cornwall and West Devon. The objective is to encourage hosts to actively invite friends and relatives to visit outside the main season. A secondary objective should be to increase the spend derived from this segment by communicating the benefits of VFRs staying in tourist accommodation rather than their host's home.

Most of the marketing appeals should be made to the host who then acts as an intermediary for potential VFRs. Mining heritage should be promoted as one of the aspects that makes Cornwall and West Devon distinctive. To work, the campaign needs to depict a Cornwall and West Devon that the local population would recognise and not necessarily the traditional tourist image. Other elements that could be promoted alongside mining heritage include local food and drink and events such as Dehwelans. Possible tactics include:

- Information packs providing special offers and Cornish days out (including mining heritage) that are requested by the host but circulated to friends and relatives.
- Providing email and web-based content to local hosts suitable for forwarding by email to their US & Australian relatives.
- Campaigns that encourage VFR to use tourist accommodation rather than host's home. (Possible benefits of staying elsewhere include hosts' home not being big enough or letting someone else make the breakfast).
- Marketing messages should emphasise that visiting out of season is a great way to have Cornwall to yourself.

Traditionals

We know from the market segment assessment that this group enjoy visiting attractions, museums and galleries as enjoy theatre and arts events. Possible methods of promoting to this group include:

- Campaigns centred on special offers and discounts are effective to this group.
- Marketing messages should promote mining heritage as part of the distinctive nature of Cornwall and West Devon and remind that visiting out of season is a good way to avoid the hordes and enjoy the mild climate.
- Traditional promotional media will be more effective than internet-based campaigns.

- Encouraging those producing promotional print aimed at out of season market to use mining heritage as one of its “Cornish” themes.

Education and Lifelong Learning

Chapter 6 identified the primary and secondary schools markets and the further and adult education sectors as being worthy of development. The chapter also suggested it would be useful to develop separate marketing for primary and secondary schools due to their differing visit patterns and information needs. This approach is endorsed in the medium term but in the short term there are some issues that can productively worked on across the two sectors.

Marketing to primary and secondary schools should initially concentrate on stimulation of the local schools market for day visits. Key to the success of this is the need for attractions within the bid areas to work collaboratively to reach this market. Given limited resources available at individual attractions, consideration should be given to WHS Project staff taking a lead role in encouraging collaborative marketing.

In the medium term the aims should be to develop two parallel but distinct approaches – one aimed at stimulating the residential school visit market amongst secondary schools with the other looking to further develop the primary day visit market.

We believe that consideration should be given to commissioning an education strategy that looks at information needs of all the learning audiences and linkages with LEA and other education sector initiatives. The strategy should also address the marketing and product development required to develop the learning sectors. In order to implement the resultant strategy there may be a requirement for staff resources at attractions to be supplemented by a person with Site-wide remit and role.

Domestic long holidays / family holidays and breaks

The key to success with these segments is widening the appeal of mining heritage. Marketing to this segment should concentrate on using mining heritage, along with other local aspects which are seen by visitors as quintessentially Cornish, to promote the area’s distinctiveness in destination marketing. A parallel objective is to raise awareness of opportunities to ‘access’ once within the area and to point towards sites and locations and resources (including the 3 Gateways) that that explain the nature of the WHS, how it relates to the area’s distinctive natural and cultural settings and how and why the WHS requires preservation. There is also a need to encourage visits to the area’s mining heritage attractions.

The following is offered as a suggested approach:

- Assist Tourism Officers / Tourism Associations/ Cornwall Tourist Board in the inclusion of mining heritage in destination marketing that aims to convey the distinctive facets of Cornwall and West Devon by providing text and images for inclusion in destination print.
- Commission and distribute imagery to Tourism Officers for use in destination print which shows people/ family groups cycling/walking through the landscape with mining heritage as part of this experience.
- 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.

Post-family holidays and breaks

Marketing should focus on the promotion of 3-6 day short breaks out of peak season. Active promotion should concentrate on partnership working with existing Destination Management Organisations (DMOs) in order to develop a range of product offerings that are attractive to this segment. Some suggested approaches are detailed below:

- Promotion of local walking and cycling trails.
- Work with cycle hire companies to develop themed tours (see cycling segment for more information).
- Link the availability of good walking routes in stunning scenery and good quality walking information with the physical legacy of mining.
- Emphasise the quality of the mining heritage legacy by reference to the 'hoped-for' WH status.
- Promote mining heritage along with other aspects that help make the area distinctive. (i.e. sell it as a Real Cornwall experience at a time of year when you can virtually have the place to yourself).
- Tourist Information networks are the key outlet for the distribution of guided walks leaflets and information once this segment are located in the area. Training and awareness raising amongst TIC of mining heritage also has a part to play.
- Work with the South West Coast Path team and other footpath management bodies on signage of mining heritage on official maps, publications and websites.
- Encourage a greater number of mining-heritage attractions to remain open during the shoulder months.

Access to mining heritage in an informal way (i.e. walking past some relic and reading an interpretation board) is as important to this market as established visitor attractions.

7.4 General marketing issues

The previous section highlighted a number of market segments, many of whom maybe visitors for whom mining heritage and the WHS are not major motivators of visits. Despite this possible indifference, the WHS designation places upon stakeholders the responsibility to raise awareness of the WHS and the need to protect it amongst these potential audiences. There is also the opportunity to widen the appeal of mining heritage in order to engage with these more general markets.

This section provides a commentary and offers recommendations that relate to meeting these objectives through a number of marketing methods.

7.4.1. Branding

Branding is a term often used to describe a visual mark or logo. However, branding covers much more than this. It is the feelings, impressions and perceptions that people have about a product, service, destination or concept. Another way to view brand is like the personality of an individual - there are many elements that make up a destination's brand, but each of the elements is not the brand in itself.

This section is not a comprehensive look at all aspects of the WHS brand. Instead it develops summary strategies in three areas that are considered to significantly contribute towards the WHS brand. These are:

- The visual strategy (including the logo)
- The image strategy
- Website strategy

Visual strategy

The physical characteristics of the WHS provide a number of challenges to the creation of a 'sense of place' and by default, a consistent brand.

Among these are the fact that the WHS covers such a large area and that fact that it consists of many thousands of individual mining heritage assets spread across 10 non-continuous areas within Cornwall and West Devon. Put simply, it could be very easy for visitors to not realise that they are in a WHS at all.

This fact means that the physical representation of the WHS through such aspects as publicity, signage and interpretation boards has a more important than usual part to play in conveying consistent and visible messages about the WHS. An important part of ensuring that visitors are aware of the WHS is to develop a comprehensive visual identity strategy. Although it lies outside the scope of this strategy to fully develop this aspect, listed below are some of its requirements. The strategy:

- Is more than just a logo. It is about the tone of voice or personality that should be adopted on interpretation panels and in leaflets.
- Should provide ways in which the UNESCO emblem can be incorporated into the current logo and/or linked to it in a consistent manner.
- Should look at whether the existing colours used in the logo (particularly black) are appropriate to be used on all occasions. If not, then recommendations to alternatives should be offered.
- Should include clear but comprehensive guidelines for applying key aspects of the WHS visual identity. This is important as much of the marketing of the WHS will be done by people other than the WHS Project Team. As such, the guidelines should include such aspects as:
 - Use of the current WHS logo

- WHS colour-palette. The colour palette is a range of colours and tones that can be used in marketing materials and publicity that relates to the WHS. Partners and those engaged in the wider promotion of the WHS through existing tourism marketing should be encouraged (where possible) to use this palette when communicating information about the WHS.
- WHS fonts. The selection of a series of fonts to be used on WHS promotional materials on interpretation boards etc.
- How the WHS visual identity will work with and not dominate other brands. As has been stated elsewhere, the marketing of the WHS has to take place within the context of a wide range of marketing undertaken at a national , regional and local level. The visual strategy for the WHS should be able to work alongside other logos and within others brand guidelines. It is recommended that any design brief for the visual strategy makes it explicit that the brand will need to be applied as a stand alone brand on certain items (e.g. an official guide) and as a form of endorsement in others

Image strategy

Visual imagery in the form of photographs will play an important part in building the brand values of the WHS areas. Their use in destination brochures and in publicity leaflets is integral to how the WHS is perceived. Consultation undertaken as part of the strategy development revealed that some Tourism Officers are unsure how mining heritage can be used in destination print that is aimed at general segments such as the domestic long holiday market.

There is a need to develop a strategy in which images of the WHS support the Site's brand. It is envisaged that the WHS team should commission a number of photographs that fulfil the twin concepts of mining heritage within the landscape setting and access being provided to the mining heritage. These images should be made available to those already promoting the area. Some possible images include pictures of:

- Family groups cycling / walking through sunny landscapes that includes mining heritage (e.g. Mineral Tramway near to an engine house).
- Evocative landscapes under moody skies that include mining heritage.
- Events / live interpretation that bring mining heritage to life.
- Groups waiting to take an underground mine tour.
- Dramatic (and preferably outdoor) art events that have a mining theme.
- Pictures of contemporary craft objects made from tin.

Web Strategy

The WHS is currently promoted through one official website (www.cornish-mining.org.uk). This provides a good range of high quality information about the WHS areas.

It is recommended that the web strategy for the WHS is as follows:

- Retain the information-based role of the current website. It should be seen as a web-based equivalent of an 'Official Guide'.

- The website should contain a section that promotes the Landscape Areas as destinations. This will highlight the Landscape Areas' beauty as much as it does the Areas' mining heritage. This section should provide links to specific mining heritage attractions, accommodation providers and tourism guides.
- Consideration should be given to developing an area on the website where tourism enterprises, tourism officers and other stakeholders can access copies of the WHS brand guidelines and copies of images commissioned for the WHS. Access can be monitored by use of passwords or creating a signing in screen to capture basic information on those that seek to use the brand / images.
- In the short term, the main website should provide a higher profile for regularly updated information about the process of securing nomination (and eventual inscription) as a WHS. This should be designed as much for a local audience as a visitor audience. An email update facility should be developed to allow people to sign up for regular news on the progress towards WHS status.
- Where segment-specific promotional tactics are developed to reach specific markets (e.g. ancestral tourism), separate sister sites should be set up (with different web addresses) rather than attempting to add these sites to the main website. This will allow more promotion-based content to be included. The general WHS website should act as a portal or gateway to any sister sites created.

Print strategy

A number of specific suggestions for print has been made in relation to campaigns aimed at specific market segments. In addition to these we would recommend that consideration is given to producing two general items:

- An 'official guide' to the WHS area. The guide should be produced prior to official nomination and used as a method of raising awareness about the plans to seek WHS status. We consider it to be most practical to develop the guide in partnership with a publisher who can secure a high level of distribution in retail outlets throughout the area.
- A free leaflet promoting the WHS. The leaflet should follow the suggested model outlined in Chapter 3 and focus on experiencing the Landscape Areas and seeing mining heritage as part of this experience. (e.g. The Tamar Valley would be described and within that walks/trails such as the Tamar Way would be promoted along with what mining heritage you can see along its length. Attractions such as Morwellham Quay and Cotehele would be covered).

7.4.2. Training

There is a fair level of awareness of the WHS bid within tourism businesses and those engaging directly with tourists (e.g. TIC staff). However there appears to be a significant amount of people that know little of the process. Awareness-raising through the provision of training may provide a practical method of ensuring those engaged with the public and visitors on a day to day basis, are fully aware of the nature of the WHS. Options include:

- Lectures / talks on the evolving history of mining in the area.
- Familiarisation trips to Landscape Areas and mining heritage attractions.

The courses should target sectors such as tourism businesses, TIC staff and librarians whilst the emphasis should be on creating a half-day entertaining & informative course.

8 IMPLEMENTATION & MONITORING

The purpose of this marketing strategy is to provide the over-arching themes and methods of approach that will guide the marketing of the WHS over the long-term. It lies outside the scope of this report to provide detailed notes regarding the tactical implementation of marketing strategy. However this chapter offers a number of pointers as to what we see as the key issues relating to implementation.

8.1 Roles

There are a large number of stakeholders within the WHS. This section seeks to clarify some of the roles that key stakeholders may wish to take on in implementing marketing strategy. This section should not be seen as a comprehensive list or a prioritisation of the listed stakeholders over those not named. The suggestions also need to be taken in light of the current review of tourism development and delivery that is being co-ordinated by the Cornwall Tourism Forum. Their proposals include a new lead body for tourism in the County and new roles for a number of agencies including Cornwall Tourist Board. However it is as yet unclear whether/how these suggestions will be taken forward.

8.1.1. WHS Project Team

It is not appropriate or efficient for the WHS Project team to implement all aspects of marketing strategy. Resources should be concentrated in areas where a WHS-wide approach is required and where there is little marketing activity currently taking place. Possible areas include:

- WHS marketing planning including shared research, monitoring, facilitating production of area-marketing and interpretation plans
- Public relations
- Marketing and strategic product development for education groups
- Branding issues
- Website development
- Interpretation strategy development
- Training - Awareness-raising training regarding the WHS for those within the interpretation framework and for those in the wider tourism industry
- Establish partnerships with organisations for marketing campaigns to specific segments identified in this strategy where there is currently little existing tourism marketing activity (e.g. ancestral tourism)

It should be noted that it is not envisaged that there will a “one size fits all” method of the Project Team implementing marketing strategy. It might involve working as the sole body on certain aspects whilst on others leading a consortium or partnership. In some cases it may simply involved bringing interested parties together. We also see

a role for the WHS Project Team commissioning other bodies / companies to deliver aspects of the marketing.

8.1.2. Marketing and Interpretation (M&I) Panel

The M& I Panel, or a sub-group of the Panel, should take the responsibility for monitoring the implementation of marketing strategy within the WHS. In taking on this role membership of the Panel should be widened to include representation from district level Tourism Officers.

8.1.3. Cornwall Tourist Board (CTB)

CTB has a very important part to play in the promotion of the WHS. It has already funded some of the initial research into the WHS (including a special WHS version of the Cornwall Visitor Survey). It is also a major player in tourism marketing with good links to the private and local authority sectors. CTB is engaged in a considerable amount of tourism marketing and is looking to develop a series of new EU-funded campaigns through its membership of DACOM. We consider that active engagement and partnership working with CTB is a pre-requisite to ensure that WHS marketing is integrated with and profiled within area-wide campaigns.

8.1.4. Cornwall Arts Marketing (CAM)

CAM has a proven track record of implementing major Objective One funding projects across the area and has extensive experience of working with the arts and heritage sectors. CAM is also in on-going dialogue with the WHS Project Team over collaboration and joint funding of projects that may see three heritage facilitators being put in place across Cornwall in order to assist in with marketing and training within the heritage attractions sector. The WHS Project Team should pursue partnership working with CAM and consider the organisation as a possible delivery agency for aspects of marketing strategy.

8.1.5. Cornwall & Tamar Valley AONBs

AONBs are custodians of a large number of the mining heritage-related archaeological remains within the WHS. They also have valuable experience of interpreting these remains within a landscape setting.

In addition, the contents of their respective AONB Management Plans demonstrate that the WHS is already an important consideration. It is important that the WHS continues and further enhances its high degree of partnership with AONB managers and their wider partnerships. These partnerships should also form an important plank in any consultation relating to the development of specific initiatives and proposals.

8.1.6. Countryside teams and mining heritage attractions

A number of different agencies are working as land managers within the WHS. These include private landowners, trusts and charities, government agencies and local authority countryside and environment teams. Their work covers aspects such as landscape enhancement, product development, access improvements, environmental improvement and interpretation.

Closely allied to the work of those with land management responsibility are the various mining heritage attractions. These attractions, some private and some in public ownership, are also engaged in the conservation and enhancement of mining heritage.

There is a need for mining heritage attractions and those with responsibility for the 'countryside' to work collaboratively in order to reach a number of key markets. A good number of the mining heritage attractions are already members of CATA but an additional affiliation of mining heritage attractions and countryside agencies would enable a clear focus on the needs of mining heritage. The affiliation could be set up as a sub-group of CATA rather than creating a new organisational tier. Priorities should include the production of a mining heritage leaflet and work to jointly market to the domestic long holiday and education markets.

8.2 Monitoring

Baseline information about the performance of mining heritage attractions within the WHS has already been gathered as part of the Site's Economic Impact Assessment. There is a need to ensure that there is a regular flow of data about the WHS in order to assess to what extent the marketing objectives within this plan are being met. The following represent suggestions as to areas where monitoring can be developed:

- Further research into awareness levels of the WHS amongst residents and visitors. This should be a long-term study conducted at regular intervals in the run up and subsequent to securing WHS status.
- Extend the existing research into the part mining heritage plays in people's decision to visit an area. It is considered important that the research methodology seeks to survey all visitor markets and not just those that visit attractions. There should also be clarification of whether mining heritage influenced a decision to visit an area that day, or the decision to choose Cornwall and West Devon as a destination.
- Instigate attitudinal research that asks visitors to what extent visitors are interested in the WHS and/or mining heritage.
- Agree a set of standard visitor data that attractions should provide to the WHS Project Team in return for being part of the WHS brand.
- Need to establish a system to monitor visitor numbers within the WHS. The system should be set up prior to inscription so that the impact of inscription and the associated marketing can be assessed. The sites for monitoring should include visitor attractions but also locations within the landscape which capture the more informal accessing of mining heritage assets within the WHS. This monitoring would offer an example of best practice for other prospective WH Sites around the world.

8.3 Implementation

Building on the strategic aims identified in Chapter 5 and with the priority target markets and respective roles in mind, the following section summarises the strategic marketing objectives to be pursued by the WHS Partnership during the period 2005 –

2010. The section also includes the time-frame in which each action is expected to be delivered.

8.3.1. Summary of strategic marketing objectives

- Commission a comprehensive image and branding study. The physical variety within the WHS provides a number of challenges to the creation of a 'sense of place' and by default, a consistent brand. The physical representation of the WHS through such aspects as publicity, signage and interpretation boards has a key part to play in conveying consistent and visible messages about the WHS. An important part of ensuring that visitors are aware of the WHS is to develop a comprehensive image and branding study.
- Develop a detailed interpretation strategy. The strategic approach outlines an interpretation framework that involves the proposed Gateway Centres, the network of local centres and on-site interpretation at the broad range of mining heritage assets. A more detailed interpretation strategy needs to be developed for the WHS.
- Establish marketing plans for each area. This outline strategy is concerned with developing a strategic marketing approach that can be applied across all 10 Landscape Areas and by a wide range of stakeholders. However, there may be a need to develop Area-specific tactical marketing plans (where appropriate) which take forward this strategic approach to build a local campaign.
- Produce a WHS Official Guide and leaflet. This guide should be produced prior to official nomination and used as a method of raising awareness about the plans to seek WHS status. A free leaflet should also be produced and focus on promoting the Landscape Areas and presenting the mining heritage as part of this physical experience.
- Evaluate the establishment of a WHS Mining Heritage Consortium. The strategic approach recommends the development of a network of local centres that act as communicators of local, specific stories / themes within the WHS. The formation of a consortium whose membership is derived from the network of local centres is recommended.
- Commission an option appraisal on central gateway candidates. The strategic marketing approach identified two of the three gateways proposed for the WHS. The location of a central gateway needs a thorough option appraisal.
- Commission an audit of existing education provision and commission education strategy. The strategy should look at existing facilities and initiatives within the WHS and address the marketing and product development resources that are required to develop the education and lifelong learning sectors.
- Agree and roll out quantitative market research / audience profiling. There is a need to extend current research initiatives to assess whether WHS marketing objectives are being met. This will involve members of the network of local centres. The market research should also include regular and comprehensive monitoring of visitor numbers within the WHS.

- Agree and roll out a qualitative research programme. Attitudes towards the WHS amongst visitors and residents and the part mining heritage plays in people's decisions to visit the area should be looked at as part of a programme of qualitative research. .
- Promotion to cultural and heritage tourists. The two main marketing objectives for this segment are to raise the awareness of the mining heritage and to widen its appeal. Amongst the approaches that are suggested are:
 - Encourage organisations producing guides to feature relevant images and text about mining heritage.
 - Develop programme of walks and cycle rides led by experts that uncover aspects of the mining heritage.
 - Use the social, artistic and political aspects of mining heritage to engage with this segment in a broader cultural context.
 - Improve and promote mining-related interpretation and facilities at historic home and garden visitor attractions that have links to the mining industry.
- Promotion to walkers. Marketing programmes should seek to focus on those wishing to walk whilst on holiday rather than those coming for a specific walking holiday. Possible tactics to be pursued include:
 - Inclusion of mining heritage in existing walking leaflets.
 - Re-branding of local footpaths to mining heritage theme.
 - Development of area guides that feature both public rights of way and mining heritage.
 - Provision of design templates and mapping service for parish/district/borough/county councils interested in developing guides that promote walking access to mining heritage.
- Promotion to ancestral tourists. The majority of stakeholders in the area lack the resources to tackle the overseas aspects of the ancestral tourism market on their own. As such, there is a need to work with agencies that already target those overseas markets. Possible ways of working include:
 - Work with DACOM on developing ancestral tourism campaigns to the USA and Australian markets.
 - Work with CTB to develop an ancestral tourist component of their Objective 1 marketing campaign.
 - Work with archives and family record centres and local accommodation to create accessible, inclusive packages.
 - Form partnerships with organisations in Cornwall, the US and Australia already involved in promoting Cornish links and tracing family roots.
 - Link ancestral tourism with the VFR campaign, i.e. Cornish hosts inviting US and Australian relatives to stay.
- Promotion to day visitors / local residents. Outreach work as well as promotion has a part to play here. Some possible tactics for this market segment include:

- Promotion of local walking and cycling trails.
 - Animation of the story of Cornish mining through live interpreters, miners' guided tours, audio visual, events.
 - Support and encourage active participation in local community events which have mining as a theme.
 - Creation of an events fund for community events that celebrate aspects of mining.
 - Active development of projects that encourage the local population to visit attractions.
- Promotion to those visiting friends and relatives (VFR). In particular, the objective is to encourage hosts to actively invite friends and relatives to visit outside the main season. Possible tactics include:
 - Information packs providing special offers and Cornish days that are requested by the host but circulated to friends and relatives.
 - Providing email and web-based content to local hosts suitable for forwarding by email to their US & Australian relatives.
 - Campaigns that suggest tourist accommodation as an alternative to the host's home.
 - Promotion to education sectors. Key to the success of this is the need for attractions within the bid areas to work collaboratively to reach this market.
 - Promotion to 'Traditionals'. Possible methods of promoting to this group include:
 - Campaigns centred on special offers and discounts.
 - Marketing messages promoting mining heritage as part of the distinctive nature of Cornwall and West Devon.
 - Use of traditional promotional media (e.g. brochures) rather than internet-based campaigns.
 - Encouraging those producing promotional print aimed at out of season market to use mining heritage as one of its "Cornish" themes.
 - Promotion to domestic long holiday & post-family holiday and breaks markets. Partnership working with the private sector and with those mounting the area's current destination campaigns is likely to be fruitful.

8.3.2. Implementation Timetable

There are certain tasks that require action prior to the commencement of other, related tasks. For instance, it makes sense to evaluate the establishment of a WHS mining heritage consortium prior to commissioning marketing plans for each of the Landscape Areas.

The following timetable provides some detail about the sequencing of tasks. The timeframe is split into 5 years, with each year further split into two, six-month blocks.

It should be stressed that the timetable should be seen as indicative rather than 'set in stone'.

Table 14 Timetable for Strategic Marketing Objectives for WHS Partnership

Strategic Marketing Objectives for WHS Partnership	Year				
	1	2	3	4	5
Evaluate the est. of a WHS Mining Heritage Consoritum	█				
Establish marketing plans for each area.		█	█		
Commission a comprehensive image and branding study.		█			
Develop a detailed interpretation strategy.		█			
Commission an option appraisal. On central Key Site		█			
Produce a WHS Official Guide and leaflet.			█	█	█
Audit existing ed. provision and commission ed. strategies			█	█	
Agree and roll out quant. MR / audience profiling.			█	█	█
Agree and roll out a qualitative research programme.			█	█	█
Promotion to cultural and heritage tourists.			█	█	█
Promotion to walkers.			█	█	█
Promotion to ancestral tourists.			█	█	█
Promotion to day visitors / local residents.			█	█	█
Promotion to those visiting friends and relatives (VFR).			█	█	█
Promotion to primary and secondary schools.			█	█	█
Promotion to Traditionals			█	█	█
Promotion to Domestic Long Holiday & Post-family markets			█	█	█