Cornwall Enterprise

CORNISH MINING WORLD HERITAGE SITE BID
ECONOMIC IMPACT ASSESSMENT

Final Report

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SUMMARY

Introduction

This study assesses the economic impact of the proposed Cornwall and West Devon Mining World Heritage Site (WHS), which consists of nine specific hard rock mining areas from the Tamar Valley in the east to St Just in the west. Cornwall and West Devon are on the UK Government's WHS tentative list and it is planned that the area will be inscribed in 2005/6.

The key elements of the study are:

- The Baseline. This establishes the current situation in Cornwall and West Devon in terms of the volume and value of tourism primarily motivated to make a trip to the area because of mining heritage. It also establishes the extent of mining conservation activity in the area, and provides a set of socio-economic profiles of the mining areas making up the WHS bid.
- Predicting Change. The future economic impact will stem from the changes to the current situation brought about by WHS inscription.

The study also includes an assessment of the use of mining heritage attractions and facilities.

Note that this study represents the first phase of a wider piece of research. Other elements still in place at the time of writing include further exploration of the relationship between visitor holiday planning and mining heritage.

Findings

Baseline

The mining areas differ considerably in size, population and economic characteristics, and with differing opportunities to develop any further visitor activity as a result of WHS status. Particular opportunities are identified for the Tamar Valley along with the urban areas of Tavistock and particularly Camborne and Redruth to receive more day and staying visitors throughout the year. Some of the other areas are either near capacity in tourism terms (particularly in the peak season) or are without the infrastructure necessary to properly develop opportunities.

There are an estimated annual 739,000 staying visitors and 1,913,000 day visitors for whom mining heritage is very or quite important in planning their visit. These figures should be seen in the context of the estimated 6.7 million staying trips every year to Devon & Cornwall (78% of the overall total number of visitors to the area) motivated by conserved landscape. They may also be seen in the context of the estimated 1.5 million annual visits to museums in Devon and Cornwall and the 870,000 visits per year to the identified mining heritage facilities in the study area (with the 870,000 forming 6.6% of the total leisure day and holiday staying visitor numbers to the study area). It is likely that the number of visitors considering mining heritage very or quite important is larger than those visiting the identified mining heritage sites because of informal or formal use of other sites in the wider study area – for example the wider network of mining remains evident on the South West Coast Path.

Of the £904,653,000 total expenditure by staying and day visitors to Cornwall and West Devon, it is estimated that £54.2 million (6% of the total) is by visitors who considered mining heritage to be very important in planning their trip. In addition, £64.5 million (7% of the total) is drawn from visitors who considered mining heritage quite important in planning their trip. The combined visitor expenditure related to mining heritage is estimated at £118.7 million. Visitors considering the mining heritage distinctiveness of the area in their holiday planning are part of the wider group of visitors motivated by conserved landscapes. The visitor expenditure is estimated to directly support 2,672 FTE jobs in visitor facing businesses, and a further 1,226 FTE "indirect" jobs through multiplier effects.

Forty seven mining conservation businesses were identified with an estimated 119.6 FTE jobs directly supported through conservation of mining heritage assets. This compares fairly closely with an estimate of 96 FTE jobs supported per year on average through 29 identified mining heritage conservation projects.

Predicting Change

Regional tourism forecasts have a target 40% increase in visitors from 1999 to 2010, although at the time of writing new forecasts are being prepared. Visitor activity growth as a result of WHS status will be part of the tourism development needed to realise this target. There are a growing number of additional short holidays, and consumers increasingly looking for distinctiveness and authenticity, which offers opportunities for heritage facilities. However, in addition to mining heritage, there are other high profile attractions in the study area looking to draw new visitors.

Other WHS destinations have had varied impacts from inscription, with impacts dependent on existing visitor profile and importantly, the weight of resources used for marketing. Partnerships within the Cornwall and West Devon Mining Landscape WHS have begun plans for marketing; with a likely campaign spend of up to £500,000 over three years (although this is still in discussion). This activity will commence in the year preceding inscription although the main effort will be used to support inscription and the immediately following period. This investment is in addition to the tourism capital projects, infrastructure projects and other product and people investment required to deliver the experience to visitors once in the area.

The review of the evidence from other WHS destinations, tourism and economic development professionals in the area and the likely impact of the marketing campaign indicates that there will be a 10% increase in the 739,000 staying visits and 1,913,000 day visits currently related to mining heritage. This will include the impacts of extra trips to visit mining heritage attractions and facilities as well as others motivated to visit because of the increased attractiveness of the area through its WHS status. This increase is likely to peak in 2007 (at the culmination of the supporting marketing campaign).

The visitor activity relating to mining heritage will have a less seasonal pattern than traditional holiday tourism. Subject to the marketing messages, it is likely that the most apparent benefits will be those places with a less developed tourism profile, such as Camborne-Pool-Redruth, Tavistock and the Tamar Valley. In addition, the overall situation will be blurred by the impact of other landmark developments, changing trends in the pattern of tourism and a host of other possibilities outside the influence of the agencies concerned with WHS status (such as terrorism, economies, exchange rates etc.).

The combined visitor expenditure will rise as a result of the increased visitor numbers generated through WHS inscription and associated marketing support; from £118.7 million in 2000 to £120.8 million in 2005 and £124.2 million in 2010. The employment directly supported in visitor facing businesses through this expenditure will rise from 2,672 FTE jobs in 2000 to 2,716 FTE jobs in 2005 and 2,794 FTE jobs in 2010. When multiplier effects are included, the FTE jobs supported rises from 3,898 in 2000 to 3,962 in 2005 and 4,075 in 2010.

Proposed expenditure by 33 future mining heritage conservation projects in Cornwall and West Devon totals £59.4 million. This is estimated to directly support an average of 214 temporary jobs per year to 2010, amounting to 330 FTE jobs per year when multiplier employment is included.

The table below indicates the forecast change in total employment (i.e. direct and indirect) from 2000 to 2010.

Direct and Indirect FTE jobs supported through mining heritage in Cornwall and West Devon

Activity	**2000**	**2005**	**2010**
Mining Heritage Related Tourism	3,898	3,962	4,075
Mining Heritage Conservation	185	330	330
Total	4,083	4,292	4,405

It is possible to express the employment estimates in terms of jobs safeguarded and jobs created. In total, 4,083 FTE jobs are safeguarded (i.e. the baseline) and 209 FTE jobs are created by 2005 and 322 FTE jobs created by 2010. The jobs created arise through the estimated increases in employment supported as a result of increased visitor and mining heritage conservation activity.

Wider Impacts

In addition to the economic outputs forming the core of this study, it is apparent that there are a number of other impacts from the WHS bid. These will include:

- Social and community benefits through improved civic pride, leading to a virtuous circle of increased private investment
- Environmental benefits through multiple reuse of brownfield sites
- Complimentary fit with other tourism and leisure provision
- Branding of the area as internationally significant, with likely wider inward investment benefits
- Benefits from the use of the WHS brand in marketing by public and private sector
- Providing a theme and structure to a fragmented set of attractions and other facilities enabling cohesive and effective joint action
- Local business opportunities prompted through economic reuse of converted historic buildings

- Generation of intellectual capital in Cornwall and West Devon, building capacity in the area and providing export opportunities

- Direct employment within the WHS Implementation Project

The study has uncovered no evidence that the conservation of mining heritage has constrained economic development in the study area.

Further details on the methodology and findings can be found in the main body of the study, with supporting evidence in the appendices.

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1 INTRODUCTION

1.1 Atlantic Consultants were commissioned by Cornwall Enterprise in September 2002 to undertake a study of the Economic Impact of the proposed World Heritage Site (WHS) inscription for Cornish Mining Heritage.

1.2 The study has been directed by a steering group comprising

- Jeanette Ratcliffe, World Heritage Site Bid Project
- Nicholas Johnson, Cornwall County Council Historic Environment Service
- Steve Crummay, Cornwall County Council Environmental Programmes Service
- Georgina McLaren, Cornwall Enterprise
- Carol Wilson, South West Regional Development Agency
- Garry Elderbrand, Government Office For the South West
- Carol Proctor, Heritage Lottery Fund
- Deborah Smith, Cornwall Tourist Board
- Lesley Garlick, Devon County Council
- Bernice Keith, The National Trust
- Jan Clarke, Trevithick Trust
- David Stuart, English Heritage

Objectives

1.3 The brief sets out the objectives for the study. The single main purpose is to quantify the potential economic impact for Cornwall and West Devon having their historic mining landscapes inscribed a World Heritage Site, with the full range of economic benefits identified. Within the overall objective, the study:

- Establishes baseline data relating to the current benefits from mining heritage
- Establishes the likely impact of inscription
- Estimates the corresponding change in economic benefits.

1.4 The study operates on two geographical levels:

- Across the whole of Cornwall and West Devon (the 'wider' area likely to be affected by WHS inscription)
- Separately for each of the nine identified mining areas (defined to district/ward level)

1.5 In addition to the changes simply brought about by inscription as a World Heritage Site, the study includes estimates of the impact from the planned related projects, such as projects aimed at consolidating/enhancing the physical remains of mining and related sites, as well as improving public access and interpretation.

1.6 Note that this study represents the first phase of a wider piece of research. Other elements still in place at the time of writing include further exploration of the relationship between visitor holiday planning and mining heritage, through a larger scale visitor survey during the spring, summer and early autumn 2003. It is proposed that some of the findings detailed in this study are revisited following the availability of this new survey information.

World Heritage Sites

1.7 The WHS list is a product of the *Convention Concerning the Protection of the World Cultural and National Heritage*, signed by more than 170 countries. These sites are distinct from sites with national accolades in that they are recognised as having international interest and constitute a world heritage which the international community as a whole has an obligation to protect. Nominations come from prospective site's own countries, with the World Heritage Committee meeting annually to assess them. The assessment includes consideration of independent evaluations from the International Council on Monuments and Sites, and the World Conservation Union.

1.8 There are 730 sites inscribed on the World Heritage List by the UNESCO World Heritage Committee. The majority of these are cultural, with the remainder natural or mixed sites. Cultural heritage refers to monuments, groups of buildings and sites with historical, aesthetic, archaeological, scientific, ethnological or anthropological value – such as the Cornish and West Devon mining sites

1.9 Within the UK there are 24 World Heritage Sites in total, three of which are in the South West – Stonehenge/Avebury and Associated Sites, City of Bath, and the Dorset and East Devon Coast. Industrial Heritage is common to a number of the UK's World Heritage Sites, such as the Derwent Valley Mills, the Blaenavon Industrial Landscape and the Ironbridge Gorge.

Cornwall and West Devon Mining World Heritage Site Bid

1.10 In recognition of the high value it places on Cornwall and West Devon's mining heritage, in 1999 the UK Government included it in its Tentative List of 25 sites that it would like to see submitted to UNESCO for World Heritage Site status over the following 5-10 years.

1.11 The term Cornish Mining is used in this context to denote the physical remains of hard-rock mining in Cornwall and the area of West Devon that historically formed part of the Tamar Valley mining area.

1.12 The case for WHS status (as presented in the Tentative List) is based on the following five characteristics.

- The suite of minerals in the Cornubian ore field, with 440 species out of a worldwide total of some 3,300.
- The part played by Cornish miners, adventurers, and engineers between 1800 and 1860 in the development of steam technology and mining technology throughout the world, including Trevithick's steam engines, the use of coal gas for lighting, Davy's safety lamp and Bickford's mining safety fuse.
- The survival of the mining landscape and its associated industrial concerns, urban development, rural settlements and miner's small holdings, great houses, parks and gardens, mineral railways and mineral ports.
- The comprehensive character of the statutory protection, conservation and long term management measures covering this wider historic mining landscape now in place and presently in progress.
- The existence of a well documented Cornish mining diaspora of mining sites (physically similar to mine sites in the region) and Cornish people. This is particularly well represented today in South Australia, and the United States of America. In addition there are particularly well preserved mining sites in Mexico, the Virgin Islands and Spain.

1.13 The Cornish Mining World Heritage Site Bid Partnership has the responsibility for putting together the bid for Cornish Mining on behalf of the UK Government. The Bid project, which is being delivered by Cornwall Archaeological Unit (part of the Historic Environment Service of Cornwall County Council) on behalf of the Partnership, represents the detailed process of compiling the Cornish Mining WHS Bid. The end result will be the nomination of the Cornwall and West Devon Mining Landscape for World Heritage Site Status.

1.14 The Cornish Mining WHS Bid project is a technical study that involves the creation of an electronic database of mining and mining-related remains and the preparation of the two Bid documents required by UNESCO - a Nomination Document (which provides the justification for why the site should be inscribed) and a Management Plan (which sets out its current and future management). It also includes a baseline study of the economic benefits accruing from the proposed World Heritage Site – which is the subject of this study.

1.15 In addition to the production of paper reports, the project results are being disseminated via a dedicated web site and by providing copies of the GIS mapping generated to project partners.

1.16 The project commenced in April 2001 and the nomination documents will be deposited with the Secretary of State for Media, Culture and Sport, for submission to UNESCO by 1st February 2004. This would allow it to be considered for inscription by the World Heritage Committee in June 2005.

1.17 Project progress is monitored by an Officer Working Group (made up of officers from the organisations providing the matched funding for the project, and from a number of other organisations that have a key role in the WHS Bid process), and by the Cornish Mining WHS Bid Partnership (comprised of representatives from the wider range of organisations that have an interest/involvement in the bid process). The project is also informed by Technical and Area Panels made up of experts in mining history, conservation, planning and economic regeneration.

1.18 The Cornish Mining WHS Bid is being funded by the Cornwall and Isles of Scilly Objective One Programme, with matched funding from English Heritage, The National Trust, Tamar Valley AONB, all local authorities in Cornwall and West Devon and the South West Regional Development Agency.

1.19 As an Objective One project it contributes to the objectives set out under Priority 5 (Regional Distinctiveness) in the Single Programming Document and Programme Complement. It contributes directly to Measure 5.2 (Enhancing and Developing the Public Product) as a 'feasibility and technical study to develop a strategic approach to public product investment'. The WHS Bid is also contributing to the Programme's three cross-cutting themes of Environment, Equal Opportunities and Information Society.

1.20 The Cornish Mining WHS bid is a serial nomination comprised of separate areas centred on the main mining districts. Following research into the history and significance of Cornish Mining and GIS mapping of its total landscape impact across the whole of Cornwall and West Devon, initial draft boundaries were defined. During the course of this study these boundaries have been adjusted and at the time of writing there is continued debate about which areas will eventually form the eventual bid.

1.21 These boundaries are currently being refined through discussion with Area Panels (comprised of local authority planning, conservation and economic regeneration officers, elected members, major landowners, statutory agencies, and local mining experts), English Heritage and ICOMOS UK (the UK arm of the International Council on Monuments and Sites – UNESCO's official advisor on World Heritage Sites).

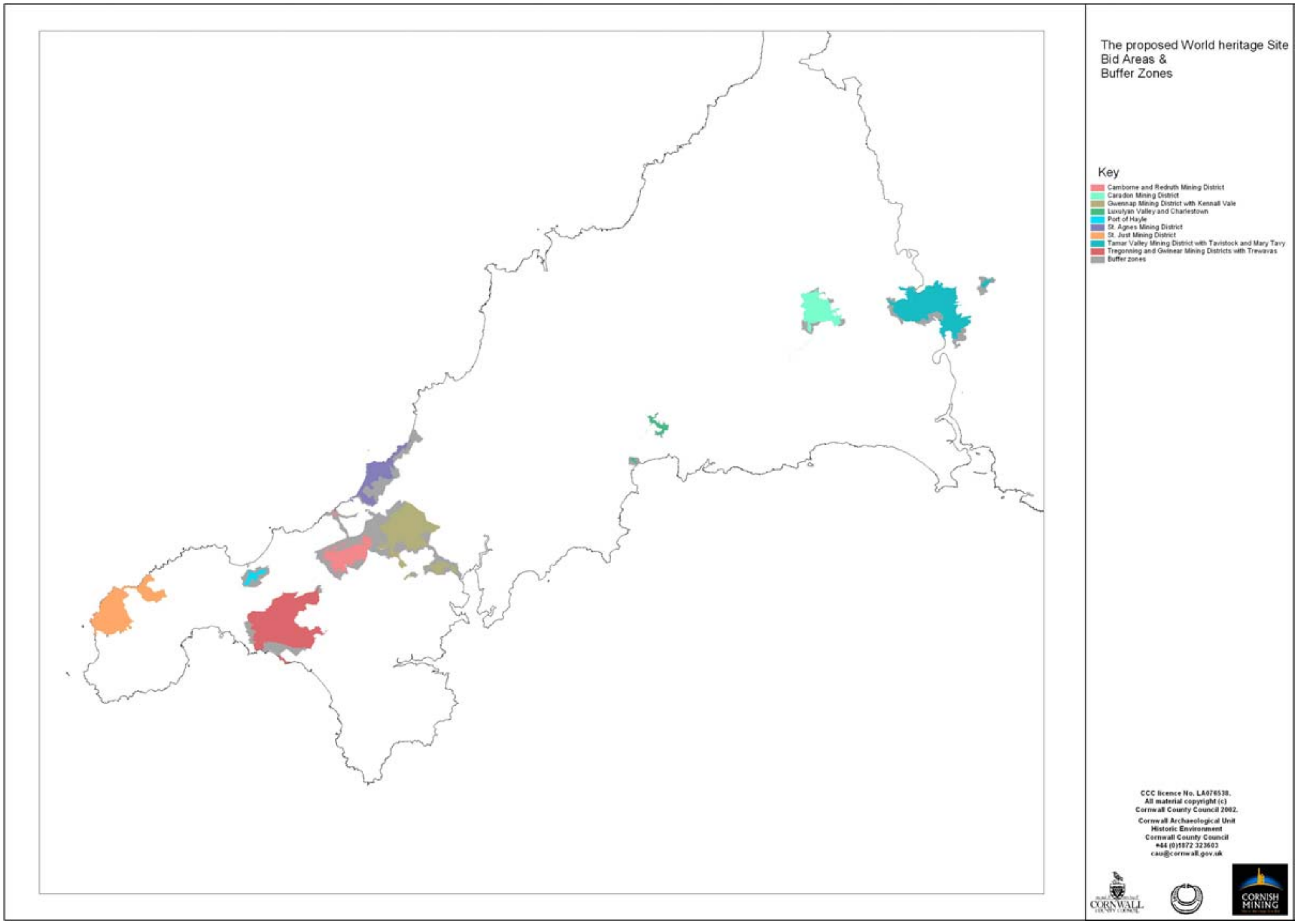
1.22 The areas forming the WHS bid are:

- St Just Mining District
- Port of Hayle
- Tregonning and Gwinear, with Trewavas
- Camborne and Redruth Mining District
- Gwennap Mining District, with Kennall Vale

- St Agnes Mining District
- Luxulyan Valley and Charlestown
- Caradon Mining District
- Tamar Valley with Tavistock and Mary Tavy

1.23 Please note that there is discussion about whether Mary Tavy should be part of the bid and in addition, the Carnmenellis and Porkellis area has been part of the discussion and may be included. The profile and socio economic analysis therefore includes both these two mining areas.

1.24 During the course of this study the definition of the WHS bid areas has continued to evolve and therefore some of the profile and socio-economic information considers a number of sub areas which together form the nine mining areas and the one potential mining area noted above.


The proposed World heritage Site
Bid Areas &
Buffer Zones
Key
Camborne and Redruth Mining District
Caradon Mining District
Gwennap Mining District with Kennall Vale
Luxulyan Valley and Charlestown
Port of Hayle
St. Agnes Mining District
St. Just Mining District
Tamar Valley Mining District with Tavistock and Mary Tavy
Tregonning and Gwinear Mining Districts with Trewavas
Buffer zones
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2 METHODOLOGY

Introduction

2.1 This section sets out the methodology used for the three key stages of the study:

- Establishment of the baseline
- Predicting the likely future direct effects of WHS inscription
- Modelling the indirect effects

2.2 This section therefore provides a foundation for further sections of this study

Study Approach

2.3 The whole study is set in the context of WHS milestone dates - 2000 (when the bid was launched), 2005 (the likely date for inscription) and 2010 (a reasonable period after inscription, when the effects - both "outputs" and "impacts" - should be apparent).

2.4 A key part of the methodology is the assessment that most key economic outputs and impacts resulting from WHS inscription are likely to arise through two key sectors:

- "tourism" spend, by visitors to the Study Area motivated in some way by interest or the attractions of mining heritage
- "conservation" spend through projects and agencies seeking to protect and enhance the sites, buildings, structures, etc. which form the mining heritage within the WHS Areas

These sectors of spend will contribute to the overall scale of the Cornwall and West Devon economy, to the turnover of businesses within the area, and to employment of local residents. To these can be added some other spend, as discussed below.

2.5 The scale of spend through visitor activity is likely to be by far the largest single economic impact of mining heritage and WHS inscription. The study has therefore devoted significant effort to scoping and developing the methodology for assessing this impact and the changes which may occur as a result of WHS inscription.

2.6 It is important to acknowledge that the mining heritage of Cornwall and West Devon which is encapsulated in the WHS bid forms an essential part of the overall environment, history and cultural distinctiveness of the area. It is impossible to divide that heritage and the physical evidence of it from the other facets of the environmental quality and attractiveness of the Cornwall and West Devon. Nonetheless it is apparently true that at least some visitors to Cornwall are not significantly motivated by heritage, landscape or cultural issues. The study therefore does not start from a position that all visitors – and the economic impacts which flow from them – can be attributed in some way to mining heritage. The critical challenge for this methodology is to find an approach which fairly represents the significance of mining heritage to the economy of the area; then to assess the specific value, or the increase in value of mining heritage, which will arise as a result of WHS inscription.

2.7 The methodology is developed in three parts:

- Baseline – in which the current economic value of mining heritage to the economy of Cornwall and West Devon is assessed; and other relevant factors are quantified
- Predicting Change – in which the direct impacts of WHS inscription are assessed through a range of research methods, to quantify the change in the economy which will result from inscription
- Indirect Impacts – in which the impacts which will arise as a result of direct impacts are discussed and a methodology included.

Baseline

2.8 The first part of the study is an assessment of the current situation in Cornwall and West Devon, with particular reference to the overall visitor activity relating to mining heritage, and to mining heritage conservation projects.

2.9 The focus of the work is an assessment of the proportion of total visitors to the Study Area who are primarily motivated by mining heritage. This is developed by comparison of the total numbers and spend of all holiday visitors with data from a survey investigating visitor interest in mining heritage.

2.10 The level of visitor interest in mining heritage attractions and facilities is also explored. The role of this element of the study is to assess the scale and distribution of visitors actually using mining heritage sites. The numbers derived can be compared with the above figures for overall numbers of visitors whose visits to the area may be interested in mining heritage.

Predicting Change

2.11 The future economic impact of the Cornwall and West Devon Mining Landscape World Heritage Site inscription may be considered as expressed in the following formula:

Economic Impact = Existing activity x Spend x Change in activity resulting from WHS Status

Within this relationship, the *Existing Activity* and *Spend* is established in the Baseline.

2.12 The *Change resulting from WHS Status is estimated by combining several perspectives*:

i) through the analysis of the available evidence from other WHS sites and the changes they have experienced;

ii) from the views of tourism and economic development professionals within key agencies (who have been involved in developing and implementing relevant initiatives and assessing impacts); and

iii) an understanding of the product development and marketing plans to exploit future WHS status.

Other Considerations

2.13 As noted above, it is apparent that mining heritage is an integral part of the distinctiveness of Cornwall and West Devon, and is part of the total environment of the area. *Valuing Our Environment* (National Trust 1998) noted the importance of the conserved landscape in motivating visits to the region (with 78% of visits motivated by conserved landscape, defined as the managed rural environment). In Cornwall and West Devon, mining remains are very much part of the conserved landscape and therefore on this basis, the visits motivated by mining heritage will form some part of the 78% of all visits to the area motivated by conserved landscape (although clearly the landscape motivation will include a range of scenery types from wilderness to the results from human activity). However, this methodology seeks to discriminate further in assessing the specific contribution which mining heritage makes to visitor interest in the area.

2.14 The Regional Tourism Forecasts (2001, South West Tourism) predict a target 40% increase in the volume of staying trips between 1999 and 2010, although these forecasts are being reviewed at the time of writing). These forecasts indicate that for this increase to take place there will need to be substantial product and marketing development across the area, and in many different facilities and activities. The tourism benefits estimated in this study to arise because of WHS inscription will be part of the necessary growth needed to meet the target forecasts, rather than being *in addition* to these forecasts. We should not expect mining heritage to achieve all of that 40% increase or even to benefit from a fixed proportion of it. Mining heritage and WHS inscription will need to play its part in achieving that target; and we must estimate the scale of its impact through other methods.

2.15 As indicated above, part of the study investigates new mining heritage projects, which will increase the capacity and range of opportunities for mining heritage tourism in Cornwall and West Devon. This will have a direct impact on activity at a local level, although it will not necessarily have a direct relationship with overall numbers of visitors motivated by mining heritage to the wider Cornwall and West Devon study area. We need to assess the impacts at both scales, and to compare the two.

Baseline

2.16 The brief directs that the baseline have the following contents:

- Socio-economic Profiles

- Economic Contribution of Visitors
- Mining Heritage Conservation

Socio-economic Profiles

2.17 The specific mining areas making up the WHS bid are not drawn around standard administrative areas, but instead are based around the distribution of significant mining remains. This has had to be reconciled with the availability of the data required to provide the statistical basis for the socio-economic profile. The principle followed is that the impacts of inscription will extend into the wider area. This principle reflects the approach of the conservation generated WHS 'buffer' zones around the core areas.

2.18 Therefore an exercise has been undertaken as part of this study to fit the specific mining areas into the mosaic of administrative "wards" for which statistical data are available. Wards are the smallest geographical area for which the majority of the relevant official, reliable, comparable and replicable data is available. Therefore if a mining area extends into any part of a ward then the ward is included – unless the incursion of the mining area is minimal, such as less than five buildings. The wards used for each of the mining areas are noted in the relevant profile.

2.19 Alongside the quantitative description of each area developed through ward data, a qualitative assessment was undertaken, through site visits and surveys. This process was used to confirm the characteristics of the settlements within the area and the existence of particular attractions, facilities and businesses in the area. It provides a basis on which to assess the ability of each of the areas to absorb extra visitor activity and to assess economic change over time.

2.20 Note that this section of the work includes the Carnmenellis and Porkellis area, and the Mary Tavy sub-area. These areas are currently under discussion and it is not yet clear whether they will be part of the bid or not.

2.21 Area profiles are provided in the Appendix to this report.

Economic Contribution of Visitors

2.22 There are two elements to this sub-section. The first deals with visitor use of the wider Cornwall and West Devon study area, and the second looks at the use of mining heritage attractions and facilities. While almost all of the mining heritage attractions and facilities are within the specific areas, they are complemented by some other facilities, most notably the principal archives and records offices. These are included within this assessment. While both of these elements form important components of the study, in assessing the economic impacts the visitor use of mining heritage attractions and facilities has been judged to be a sub-set of the mining heritage use of the wider Cornwall and West Devon study area. This principle is important in terms of avoiding double counting.

Visitor use of the Study Area

2.23 Information on the use of the wider Cornwall and West Devon study area was obtained from published sources, particularly the *Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996*.

2.24 The mining areas cover only part of Cornwall and West Devon. Substantial amounts of the accommodation stock and other visitor facilities will be outside the individual areas. Therefore while the assets within the identified mining heritage areas may be used to motivate new trips to the sub-region, much of the economic benefit will accrue to locations in the wider study area.

2.25 When considering the mining heritage visitor use of the wider study area, business trips, visits to friends and relatives and ‘other’ trips are excluded from the total of staying visitors (from *Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996)*. The day visitor estimates from these studies are all leisure visits, and so are included.

2.26 Pilot survey work has been used to assess the importance of mining heritage in the planning of leisure trips to the Cornwall and West Devon study area. A separately commissioned survey was undertaken by Cornwall Enterprise at 17 visitor attractions across the study area, specifically to inform this study. The attractions included a variety of sites, and the analysis separately considered mining heritage and general interest visitor sites in order to form views about ‘typical visitors’ (i.e. those at general interest sites) and those whose presence at mining attractions already indicated some pre-disposition towards mining heritage. A self completion questionnaire was distributed to visitors entering the attraction, with encouragement from the front of house staff to complete and return it. The topics covered included awareness of mining heritage and the importance of mining heritage in planning the holiday/day trip.

2.27 It is important to recognise that the survey was a relatively small scale exercise which has a significant influence on the final estimates prepared and results of the survey should be verified or tested if possible. Further and larger scale survey work is planned for 2003 to test the pilot findings. Nonetheless, the pilot survey work is the only evidence currently available to provide a view on the importance of mining heritage. This study also considers other approaches to estimating visitor numbers and economic impacts to provide alternative perspectives on these issues.

2.28 The survey work indicates that 8% of the visitors to general interest attractions considered mining heritage to be very important in planning their trip. A further 19% considered mining heritage to be quite important. There was almost no difference between day and staying visitors amongst “typical” visitors.

2.29 The timing of the pilot survey work raises questions about its application to year round estimates of the volume and value of visitors. The Cornwall Holiday Survey 2001 and other evidence indicates that peak season visitors (June, July and August) are more interested in beaches and weather, and less interested in other visitor activities. The pilot survey work was undertaken solely in the autumn 2002, when visitors are less likely to reflect the peak season interest in beaches and weather. The pilot survey is therefore likely to over represent interest in mining heritage. It is therefore considered that the pilot survey overestimates the proportion of visitors across the whole year who are interested in mining heritage.

2.30 Therefore the proportion judged to be primarily motivated by mining heritage is adjusted downwards. The Cornwall Holiday Survey identifies differences between peak and shoulder season scores for natural environment and for interests/hobbies. This suggests that the adjustment should be to reduce the estimated importance of mining heritage importance to three quarters of the survey findings. This gives an adjusted proportion of 6% of leisure visitors to Cornwall and West Devon considering mining heritage to be very important in planning their trip, and 14 % considering it to be quite important.

2.31 As this study seeks to provide a quantitative economic assessment of the effect of mining heritage, the outputs of this pilot survey need to be used to judge what proportion of the overall leisure visitor spend in the study area should be considered to be related to mining heritage. The approach taken in this study has been to include all the trip expenditure by those who consider mining heritage to have been very important in planning their trip (i.e. all of the expenditure by the 6%). For those who considered mining heritage to be quite important, it is clear that there is a significant effect from mining heritage in the trip planning process and therefore half of the spend by this group will be included (i.e. half of the expenditure by the 14%).

2.32 The study process has revealed other information which may be used to corroborate the pilot survey work (the basis for these figures is discussed in section 4 of the report). The total estimated staying visitors to the wider study area totals 3.6 million holiday trips, plus an estimated 9.4 million day visits from home – a total of 13 million. The total estimated visitor use of the identified mining attractions and facilities is 867,482, which forms 6.6% of the total visitor numbers. This is the same order of magnitude as the 6% who indicated that mining heritage is very important in planning their visit. Within this there may be issues about the different propensity of day and staying visitors to use local attractions. Nonetheless, on a broad scale, this evidence does provide some substantiation of the scale of mining heritage in influencing visitor behaviour.

Visitor Use of Mining Heritage Attractions and Facilities

2.33 Information on the use of mining heritage attractions and facilities, along with information on the profile of visitors was sought through a process of research using contact with 17 of the facilities and review of published sources (particularly the Survey of Visits to Attractions, South West Tourism).

2.34 Visitor "type" has an impact on the amount of average expenditure (on and off site) per visit. Most of the visitor facilities have not been able to provide indications of the type of visitors received. Where information exists, this has been used. Where it is unavailable the average profile of visitors to National Trust properties in the South West has been used; 70% staying visitors and 30% day visitors (*Valuing Our Environment,* National Trust 1999). This has been used in preference to the breakdown of staying and day visits to the overall study area, which indicates that 32% of visitors will be staying away from home, with the rest day visits from home (Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996). While the latter breakdown will adequately represent the pattern of all visits to the overall study area, it is felt that day visitors from home are less likely to visit attractions and therefore the National Trust study is more useful in this part of the study.

2.35 Visitor expenditure will take place both on and off the site of a mining heritage facility. In practice a significant amount of off-site expenditure would have taken place irrespective of the existence of mining heritage attractions. The pilot survey work commissioned separately by the WHS Bid Project indicates that 14% of those at mining heritage attractions considered mining history very important in planning their visit and 31% considered mining history fairly important. The approach taken here is to apportion daily spend based on the assessment of mining heritage importance. The 14% considering mining heritage very important in planning their trip have all their spend included, and the 31% considering mining heritage quite important have half their spend included. Thus 30% (i.e.14%+(31%/2)) of the on and off site daily spend associated with mining heritage attractions is actually driven by mining heritage.

2.36 Not all the attractions and facilities identified have an exclusive mining heritage role. While most of the facilities identified as part of this exercise are unambiguously mining heritage facilities, some have a broader appeal. In assessing the mining heritage impact, the whole annual visitor number for the full mining heritage attractions have been used, while half the numbers visiting the broader facilities have been used. This is based on the relatively high awareness of mining heritage (as noted in the survey work) against the variety of reasons to visit facilities. The exception to this approach is for visits to archives and records offices, where consultations indicate that 10% of use relates to mining heritage, and the estimated 67% of trail use by day visitors from home tasks (*Economic Impact of the Overall Mineral Tramways Strategy,* Groundwork Kerrier 1996). Judgements on whether facilities are wholly or partially mining heritage have been made through the consultation process.

Mining Heritage Conservation

2.37 The Baseline includes three elements relating to Mining Heritage Conservation:

- Mining Heritage Projects
- Mining Heritage Contractors
- Other Businesses Supported

2.38 There is a degree of overlap between the elements listed here. In particular the information on the employment supported through expenditure on mining heritage conservation projects is essentially another view on the employment by mining heritage contractors. This approach was taken specifically to give the opportunity to compare the findings from each of these approaches. Additionally, the employment in some of the other businesses supported is likely to be supported through visitor expenditure, and so while it is useful to identify, to avoid double counting it cannot be added back into the overall totals.

Mining Heritage Projects

2.39 There have been a number of projects seeking to conserve mining landscape remains and to improve access and conservation. Many of these have been undertaken by a limited number of bodies, particularly Local Authorities, the National Trust and the Trevithick Trust, but also other organisations.

2.40 Data on previous projects was collected through contact with lead officers and through records. Some of the projects were able to indicate the temporary construction jobs supported. For those that were not able to provide this information, cost data has been combined with estimates of the labour cost content of the tasks (*Economic Impact of the Overall Mineral Tramways Strategy*, Groundwork Kerrier 1996), and the average wage rates for the construction industry in the region, £16,214.64 p.a. (2000 *New Earnings Survey*) in order to arrive at estimates of employment supported.

2.41 The *Economic Impact of the Overall Mineral Tramways Strategy* used evidence from mining heritage projects to determine the labour cost content of different types of project, and these assessments have been used to estimate the payment to labour. In addition, those projects which include an element of property acquisition have had the costs amended.

Mining Heritage Contractors

2.42 Mining heritage contractors have been defined as being on the tender lists for mining heritage conservation projects in Cornwall and West Devon. An overall list was complied from the tender list of a number of consultees, and these firms were then contacted to find out the necessary data.

Other Businesses Supported

2.43 A limited exercise has been undertaken through observation, consultation and some business contact to identify other businesses supported by mining heritage. This has included café's, specialist publishers and walking tour operators.

Predicting the Likely Future Direct Effects of WHS Inscription

2.44 A range of information has been gathered to inform a review on which to base prediction of the effects of WHS inscription:

- Review of studies covering tourism trends and forecasts
- Review of other projects and studies around the theme of heritage, environment and mining heritage
- Review of the other five WHS sites in the UK specifically based on industrial heritage, as well as two other relevant UK WHS sites. This has offered useful evidence, despite the very varied circumstances of the different sites
- A series of consultations with tourism and economic development professionals in key agencies. While consultees were not able to call upon much direct WHS experience, together the consultations were able to draw upon experience of a wide range of relevant initiatives and impact assessments

2.45 It is clear that a key component of the impact of WHS status is marketing. As with other visitor market "products", the scale and quality of marketing activity can have a very significant impact on the quantity and nature of impacts achieved. The scale of impact of WHS inscription could range from very small to very substantial, depending on the marketing effort which surrounds inscription. Unfortunately for this study, consideration of a strategy for marketing the WHS is at a very early stage, so a view has been taken as to the likely effect of marketing on visitor numbers, based on the current marketing plans and ambitions.

Economic Impact

2.46 Estimating economic impacts needs to include two broad areas:

- Direct Impacts
- Indirect Impacts

2.47 *Direct Impacts* arise directly as a result of the volume and value of visitor activity and mining heritage conservation activity. Spend into the local economy from these activities will result in turnover and jobs in businesses, such as hotels, attractions, shops etc., and in construction companies. While some of the information needed to assess these impacts can be collected though straightforward counts of actual activity, other elements can be very difficult/expensive to collect at the local level.

2.48 *Indirect Impacts* relate to the expenditure of those businesses and employees which are affected by "direct" impacts. These businesses and employees spend a proportion of their increased income in the local economy, which in turn adds to turnover and employment – "indirect" impacts on the local economy. An injection of expenditure into an economy will re-circulate a number of times until it 'leaks' out through import of goods or services. This re-circulation is often known as a 'multiplier effect', with the scale of this multiplier effect a function of the self-sufficiency of the economy concerned. At a local level, leakages will be affected by the type of location (with more leakages from rural areas than urban areas) and by the geographical size of the area (with more leakages from smaller areas than larger areas).

Processes

2.49 During the course of the study a number of processes have been reviewed to assess their usefulness in estimating Indirect Impacts:

- South West Input Output Model, from Plymouth Business School
- Input Output modelling of the Devon and Cornwall economies by Owen Nankivell
- Cambridge Economic Impact of Tourism Model
- A series of one-off studies investigating economic impact either using combinations of locally-sourced information and published information, or through one of the other modelling processes (such as the STEAM tourism model – see below).

2.50 The **South West Input Output Model** originally used 1995 data from a variety of published sources, backed up by a programme of primary survey work exploring the links between different parts of the region's economy. Since that time further development work has been undertaken (using data for 1999 and with the tourism spending vectors now considerably developed) and the model is now used as a major element of the Regional Observatory Business Economy Module, providing regional accounts under the name **econⓘ**. The regional accounts are based upon 123 industries, although the overall package is still in development. However, the model behind the regional accounts can be used to provide information down to a Devon and Cornwall level, which can, for example, be used to assess the impact of different scenarios. It has been used for scenario assessments such as the impact of Foot and Mouth Disease, and to assess the impact of particular activities, such as the museum sector in the South West.

2.51 The **Input-Output modelling of the Devon and Cornwall economies** by Owen Nankivell is based on estimates from published information, treating Local Authority districts as separate 'countries'. Within the South West, the process started in Torbay and has now been undertaken for all Districts in Devon for a set of dates from 1991 to 2001. The County figure is based upon an aggregate of the district figures. The modelling is based upon 90 industries, and has also been used for scenario assessments such as the impact of FMD. Following the work in Devon, the approach is being extended to cover districts in Cornwall on behalf of the County Council, with Caradon and North Cornwall the first districts planned.

2.52 The **Cambridge Economic Impact of Tourism Model** uses regional and sub-regional published data on tourism supply and demand to construct relationships that can be applied to specific geographic areas. Estimates of visitor expenditure are distributed to different sectors of the economy and then a labour content analysis is undertaken (using data from a variety of published and unpublished studies) to generate employment supported, and linkage and multiplier effects. The format of the model allows easy incorporation of available local research data. Within the area covered by this study, all the Local Authority districts have had applications of the model between 1996 and 1998, and a new round of applications covering all the districts in the South west is currently being undertaken. There is a particular version of the model known as 'Prime', which can be used to assess the impact of new attraction development, although this requires prior work on estimating likely visitor numbers. The model is not designed to encompass initial expenditure through non-tourist sectors, such as mining heritage conservation or construction.

2.53 **One-off** and other studies have taken a tailor-made approach to typically assess the impact of a particular activity on an area. These have normally used a combination of locally gathered and published information to provide estimates. There has also been use of the Scarborough Tourism Economic Activity Monitor (STEAM) elsewhere in the South West, which models the impact of tourism activity in broadly the same way as the Cambridge Model, but is more heavily reliant on local data and is able to provide ongoing estimates throughout the year. While there has been minor use of this approach in the South West, it has a higher profile in Wales and some other UK destinations.

2.54 All of the modelling processes discussed in this section have something to offer in the context of this study:

- The Input Output models map the whole economy in terms of sectors, which allow a good contextual overview in which to place any specific sector. Additionally, because the whole economy is modelled, a more complete picture of the impacts can be built up. However it should be noted that the validity of impact estimates provided by Input Output models is dependent very heavily on the quality of data which is used to construct the model. These data must reflect the specific nature of the particular local economy being studied and should normally be developed through extensive primary surveys. A model cannot be simply adapted from one area to another, or from between different sizes of area within the same region.

- Both the Plymouth Business School and the Owen Nankivell Input Output approaches provide this wider view of the economy. As noted above, the Plymouth Business School methodology is based upon primary survey work in the South West, and this may be seen as advantageous. However, the Owen Nankivell approach is able to provide results to a Local Authority District/Unitary Authority area, which is also advantageous (although it is understood that local approximations can be made on the Plymouth model outputs). There is no available evidence from any formal comparative exercise between the two approaches, although discussion relating to different findings from both models during assessments of the impact of FMD indicated that the single major factor behind disparities was the difference in the starting assumptions about FMD, rather than necessarily model methodology.

- Neither of the two Input Output model findings are currently fully in the public domain, although the Plymouth Business School information can be accessed in part through the Regional Observatory Business Economy Module, and the extent of this access is planned to grow.

- The Cambridge Economic Impact of Tourism and STEAM models are able to estimate the volume and value of tourism, and then track the likely effects through local economies, down to local authority level. It is able to adjust findings in the light of local survey work and the methodology is relatively transparent. Furthermore, the process is regularly applied with the results in the public domain, giving access to updated figures. However, the model is not able to encompass the impact of mining heritage conservation work.

- There will always be a place for specific tailor made studies. Even with adjustments, models work best at describing average situations, and most situations are not average. Models use data from locations deemed comparable and apply this data, and this will run the risk of inaccuracy. Establishing a locally rooted information gathering process provides confidence to the users of the information and allows the incorporation of qualitative as well as quantitative information. However there can sometimes be methodological problems with local surveys, and the potential for a lack of contextual information. Additionally, tailor made studies can be more expensive.

2.55 This study has used information from the Cambridge Model applications in Cornwall and West Devon, as well as data from other sources (primarily the *Economic Impact of the Overall Mineral Tramways Strategy, Groundwork Kerrier 1996*) to provide a view of the impact from mining heritage conservation.

2.56 The current and any future applications of the Cambridge Model will provide a resource assessing the economic impact of WHS-related tourism activity. The continued Input Output work from both Plymouth Business School and Owen Nankivell will also provide a resource in the future, with the proviso that there is a need for more access to the information.

2.57 Consultations undertaken as part of this study indicate that there are wider issues around modelling the impact of projects, both tourism and heritage conservation/regeneration activity. European Union and other funding programmes require increasing amounts of evidence on the likely economic outputs and it is understood that a lack of such evidence will continue to hold projects back. Within these arguments it is apparent that fund administrators are responding properly to their obligations to be accountable, and to ensure that the money generates the planned impacts. Additionally, the lack of evidence does not particularly relate to the modelling of indirect effects, but instead relates to a lack of evidence from previous projects elsewhere.

2.58 There is clearly need for a greater level of monitoring of projects, to identify the impacts arising and to understand the specific factors that have a local bearing on the impact. It is understood that funding approval of projects is increasingly dependent on building in monitoring of impacts, and that this will be the major source of information in the future.

2.59 Some projects, particularly those to do with public product, continue to produce relatively little information about economic impact. This will be particularly so for the mining heritage projects that used to be funded under the Land Reclamation Programme. An option here would be to fund some innovative projects specifically as pilots, to gain suitable impact information.

2.60 Having considered the alternatives discussed in this section it was decided to use a multiplier approach for this study. Multipliers were sourced primarily from the Cambridge Model tourism studies and the Henley Centre construction multiplier used in the Mineral Tramways report. This approach was on the basis of availability, and fit with the data and the rest of the methodology.

Project Indicators and Outputs

2.61 The fourth part of the study establishes a framework for assessing future projects, in the *Measuring and Monitoring Economic Impact Framework* section. This is based on establishing desired indicators and reviewing the key funding agency priorities.

2.62 The consultation process included an assessment of indicators of successful progress for a World Heritage Site related project

Further Research

2.63 The pilot survey has provided some unique study-area wide information, which has been invaluable in preparing this report. However, some of the findings warrant further testing across a larger sample, to include the peak holiday season as well as the autumn shoulder season. Further work of this nature might use a larger sample to identify differences between those particularly interested in mining heritage in its own right, those who have relatively little predisposition towards mining heritage but are open to using facilities, and those who are averse. In particular, further research of the characteristics and attitudes of the middle group might provide information on the relationship between mining heritage and other destination elements that attract visitors. This further research might usefully include focus group research to explore the understanding and role of mining heritage in prompting visits and in altering behaviour once on holiday.

2.64 In considering further research it is recommended that consideration is given to building on existing research vehicles, such as the Cornwall Holiday Survey which already has a substantial sample size. It is also recommended that consideration is given to joint working with other WHS sites across the UK in order to explore awareness and motivation issues relating to WHS inscription. It is also suggested that as part of a wider monitoring process, the role of WHS inscription is tested when firms invest in new projects in Cornwall.

2.65 It is also recommended that further monitoring is undertaken of temporary employment supported through mining heritage conservation/construction projects. Although there is some evidence available, estimates of the cost per FTE job year vary and it would be very helpful to consolidate these estimates.

3 BASELINE DATA – SOCIO-ECONOMIC PROFILES

Introduction

3.1 This section of the study sets out part of the baseline from which the impact of WHS inscription can be measured. It is anticipated that WHS inscription and the activity surrounding the designation will have an impact on the economy, primarily through increased visitor and conservation activity. These baselines therefore map out the current situation in terms of the overall economic 'health' of the designated areas and the specific activity relating to the tourism and conservation activity.

3.2 These are discussed in detail below.

Geography

3.3 The boundaries of the nine mining areas and one potential mining noted in the introduction to this study have been based upon an assessment of the mining activity historically undertaken in an area, and the conservation value of the evidence remaining. These defined mining areas are therefore of varying size and may include a number of settlements of different sizes – and have boundaries relating to historic features rather than defined by physical or administrative boundaries.

3.4 An exercise has been undertaken to match these areas with wards in Cornwall. In most cases the boundaries are not co-terminus. Unless a particular ward only includes a very small part of a mining area, any ward wholly or part included in a mining area is included.

3.5 A list of the wards used and a detailed set of data is in the appendix to this report.

3.6 As well as the wards relating to the individual mining areas, there is also a profile of the overall Cornwall and West Devon study area.

Socio-Economic Profiles

3.7 A socio-economic profile has been prepared for each of the specific mining areas. This provides a picture of the local economy and community as a baseline for assessing the impact of future change.

3.8 The descriptive elements of the profiles have been drawn from a number of sources, including the Cornish Mining Landscape Nomination Working Draft, ONS, NOMIS and other publications. These sources have also been supplemented by a programme of site visits, which has also been the origin of information on visitor businesses in the areas.

3.9 The population of the Mining Heritage Areas varies significantly. Camborne and Redruth is by far the largest of the Areas (46,100) and is home to almost 10% of the Cornish population. In contrast Mary Tavy (part of the Tamar Valley mining area) is occupied by only 1,600 people and comprises only 1 ward. The predominantly rural nature of many of the Areas means that even when the Mining Area itself is comprised of 5 or more wards, the total population within these Areas remains relatively low.

3.10 The Index of Multiple Deprivation (IMD) is an indicator of the relative deprivation of a ward and takes into account measures such as income, employment, health, access and child poverty. It is not possible to amalgamate the results from individual wards to produce a ranking for the mining areas and therefore the rankings are retained at ward level.

3.11 Camborne and Redruth has significantly poorer ranked wards than those in other mining areas. Of the 7 wards in Camborne Redruth, 4 are within the worst 10% of wards nationally. Illogan South is the lowest ranked ward of all the Mining Areas and is the second most deprived ward in the whole of Cornwall.

3.12 The highest ranked wards are Feock (Gwennap Mining District) and several other wards within West Devon (Tamar Valley). Feock is ranked within the top 30% of wards nationally and contrasts significantly with other wards in the same mining area, in particular St Day & Lanner and Chacewater. On the whole, the West Devon mining area wards rank higher than the Cornish ones.

3.13 The average gross weekly pay in Cornwall is just over £250. Four Mining Areas have average earnings in excess of this figure of which Minions is the most notable, with average pay over 30% higher than that in Cornwall as a whole. On the other hand both the Carmenellis and St Just areas have average pay significantly lower than the Cornish average, 44% and 22% lower respectively.

3.14 The average pay in Cornwall increased by 8% between 1999 and 2000 although much higher rates of increase are evident in Hayle and Luxylan Valley/Charlestown where rates increased by 15% and 16%. Caradon, Tamar Valley, Tavistock and Camborne and Redruth all had much lower rates of increase (all between 1% and 2% only). The average pay in West Devon actually decreased between 1999 and 2000 by 5%.

3.15 Economic activity rates in Cornwall were 77% in 1991 with West Devon benefiting from slightly higher rates of 79%. Both Tavistock and Mary Tavy offer the highest economic activity rates within the Mining Areas (80%) whereas the lowest rates are recorded in Tregonning and Camborne and Redruth area (74% and 75% respectively).

3.16 Unemployment rates in Cornwall decreased by 36% (January) and 30% (June) between 1997 and 2000. Even larger decreases have occurred in Tavistock and Mary Tavy (48% and 56% respectively) though significant reductions have occurred across all Mining Areas. The largest numbers of unemployed (in 2000) were in Camborne and Redruth mining area (1380 claimants) and Hayle (556 claimants) and notably, total unemployment in West Devon is lower than in each of these individual Mining Areas. June unemployment figures are consistently lower than those in January indicating a tendency for increased employment opportunities within the summer months, a common feature within both Cornish and Devon settlements.

3.17 In line with population densities in the Mining Areas, Camborne and Redruth also has the largest number of jobs in absolute trems - 15,412, almost 10% of Cornwall's total and over double that offered in Gwennap and Luxylan Valley/Charlestown, the next largest mining areas.

3.18 As expected in Cornwall the industrial structure across the Mining Areas indicates the importance of employment opportunities within the distribution, hotels and restaurants sector. In Cornwall this sector accounts for almost a third of jobs and this proportion is exceeded significantly in St Just and St Agnes.

3.19 The public administration, education and health sector also accounts for significant proportions of employment across the Mining Areas. In Cornwall this sector accounts for just over 30% of employees, though Hayle, Carmenellis and particularly Gwennap have significantly higher proportions of employees within this sector. Tamar Valley, St Just and Luxylan Valley /Charlestown all have significant proportions of employees within the manufacturing sectors.

3.20 The total number of businesses within the Mining Areas varies from between 54 in Mary Tavy (part of Tamar Valley) to 1363 in Camborne Redruth. Whilst the spread of businesses across the industrial sectors is similar to that of the employee structure, it is evident that there are much higher proportions of businesses in the distribution, hotels and restaurants sector and much lower proportions within the public administration sector, indicating that within this sector, a limited number of businesses provide a relatively high number of jobs.

3.21 The majority of businesses in Cornwall (70%) have less than 4 employees and in West Devon this proportion increases to 73%. This trend is mirrored across the Mining Areas with Tregonning and Mary Tavy comprised of increased proportions of small businesses whereas Camborne and Redruth and Luxylan Valley/Charlestown have slightly higher proportions of larger businesses.

3.22 Across Cornwall, almost 50% of employment is undertaken by males of which 80% is full time employment. Of the employment opportunities undertaken by females in the County, 56% are part time. Proportions in West Devon are roughly similar to those in Cornwall but a number of the mining areas indicate much higher proportions of part time work of which the majority is undertaken by females (St Agnes Tavistock – part of the Tamar Valley). As a general rule, much higher proportions of males are employed full time whereas higher proportions of females work on a part time basis.

3.23 It is apparent that property prices across Cornwall and West Devon have increased significantly over the last few years. In July-September 2000 the average property price in Cornwall was £93,461 and in West Devon £107,490. Kennall Vale (part of Gwennap) had the highest average property price in 2000, with property almost 15% higher than the Cornish average. Both Gwennap and Mary Tavy (part of Tamar Valley) also had significantly higher property prices.

3.24 Though Camborne and Redruth offered the lowest average house prices across the Mining Areas (20% lower than the Cornish average) St Just, Carmenellis, Luxylan Valley/Charlestown, Caradon and the Tamar Valley all offered average house prices lower than the average across Cornwall.

3.25 Dramatic increases in house prices across the mining areas are however apparent over the period July-September 2000 to July-September 2002. The average increase across Cornwall was 47% however St Just, Hayle and Caradon have recorded increases of in excess of 60%. Interestingly, those mining areas with the highest average property prices in 2000 were those which recorded the smallest increases over the period 2000-2002, with Gwennap showed increases significantly lower than the

Cornish average. Hayle and Tregonning showed the highest house prices in 2002 with prices over 16% higher than the average in Cornwall.

3.26 The highest proportion of employees in Cornwall are categorised as managers/professionals in agricultural services within the occupational structure. Clerical occupations, other skilled trades and other elementary occupations are also more commonly represented. This pattern also arises across the Mining Areas and West Devon although there are some notable differences. Mary Tavy (part of Tamar Vally), St Just and Tregonning have significantly higher proportions of employees categorised as managers/professionals in agricultural services whereas Camborne and Redruth has higher proportions of employees within clerical occupations. Other skilled trades also account for proportions higher than the Cornish average in Hayle, Carmenellis and Luxylan Valley/Charlestown.

3.27 The site visits indicate that some of the mining areas are well placed to attract and benefit from extra visitors, with well establish visitor infrastructure and enterprises ready to meet visitor needs. Many of the areas have facilities over and above industrial heritage attractions, demonstrating the opportunities to link World Heritage Site opportunities to the other strands of tourism in Cornwall and West Devon.

3.28 However, some of the mining areas are less well placed to attract or benefit from visitor expenditure. In visitor management terms, decisions will need to be made about whether these areas should be used to attract visitors to less used parts of Cornwall and West Devon. This will need to be part of a wider debate and will need to include some consideration of whether the necessary skills and entrepreneurship are present to take advantage of visitors in these areas.

Area Profiles

3.29 Site visits were conducted in parallel with statistical research to assess the volume and type of visitor-facing businesses. This exercise was undertaken to provide the basis for an assessment of the capability of each of the mining areas to accommodate additional visitor activity and derive some economic benefit. The exercise also serves to record, in broad terms, the visible number of businesses in the mining area pre-WHS inscription. Note that the areas described are the mining areas and their associated wards, rather than the tighter mining area boundaries forming the WHS bid.

3.30 The details for each of the mining areas can be found in the appendix to this report.

St Just Mining District

3.31 The wider St Just mining area stretches from Lands End to Towednack, and includes St Just, Tregeseal, Pendeen, Zennor, Crowlas and Canonstown. There are a large number of small settlements with visitor-facing businesses, although St Just provides a wide range of services. Access to the beaches and rugged coastal scenery is the main reason for visits, although St Just is developing an important role for studios and art galleries. The mining area includes Geevor Mine, Botallack, Levant Beam Engine, etc.

3.32 While there are facilities set up to accommodate visitor activity, including substantial mining heritage facilities, it is understood that there is little capacity to take extra visitors in the peak season. While there is capacity for additional off-peak visitors, this would need changes in the opening patterns of businesses during the low season. Following the decline in the tourism boom in the 1980's, local evidence suggests that there is latent capacity for increased bed and breakfast provision in the area. This is relatively simple to provide should visitor numbers increase markedly, and should be the priority before new accommodation.

Port of Hayle

3.33 The wider Hayle mining area includes significant established holiday areas, with a good set of visitor facing businesses. There are also significant residential populations in Hayle and Lelant.

3.34 Again, while there is capacity for additional off-peak visitors, this would need changes in the opening patterns of businesses during the low season. While there is capacity for additional off-peak visitors, changes in the seasonal pattern of visiting would need to be matched by changes in the seasonal business opening patterns.

Tregonning and Gwinear Mining District with Trewavas

3.35 The Tregonning and Gwinear mining area is predominantly rural, with a number of small settlements. There is a significant variety of visitor businesses in the area, mainly around the coast.

3.36 Again, while there is capacity for additional off-peak visitors, this would need changes in the opening patterns of businesses during the low season. There are fewer seasonal capacity issues for the rural part of the mining area, although here there are fewer opportunities to benefit from visitor activity.

Carnmenellis and Porkellis

3.37 The Carnmenellis mining area has little in the way of major settlements, and few visitor facilities. The major visitor attraction is the Poldark Mine. With the exception of the Mine and its attendant restaurant and other outlets, there are relatively few existing businesses set up to exploit the benefits of any visitor activity generated through WHS inscription.

Camborne and Redruth Mining District

3.38 The Camborne Pool Redruth area is Cornwall's largest conurbation. Both Camborne and Redruth have sizeable town centres with a wide range of shops and services. There are also a number of attractions within the area, many of which are mining heritage related (Cornish Mines and Engines, etc.). While there is serviced and self-catering accommodation stock in the area, the conurbation is less directly reliant on tourism than many other parts of Cornwall.

3.39 The foundation of existing businesses in the area, combined with relatively little tourism activity and a wealth of mining heritage, indicates that the Camborne Redruth mining area is well-placed to exploit any benefits from WHS inscription. This is particularly the case given the recent creation of the Camborne Pool Redruth Urban Regeneration Company, which will address sites that have great potential for mining heritage related activities. The large resident population suggests that there are particular opportunities to stimulate day visits from home.

Gwennap Mining District with Kennall Vale

3.40 The Gwennap mining area sits between Truro, Falmouth and Redruth. While there are no major conurbations within the mining area, there are popular access points to the Mineral Tramways trails, Gwennap Pit, and Trelissick Gardens. The area includes or is adjacent to major transport routes.

3.41 Within the numerous small settlements that make up the mining area there is a variety of visitor facing businesses that would be able to exploit the benefits of any changes in visitor activity as a result of WHS inscription. In particular, the Mineral Tramways network of trails is seen as being well placed to accommodate more visitors, as well as dispersing them across the area. The proximity to Falmouth offers opportunities to tap into existing staying visitors, and there are substantial nearby resident populations with day visit potential.

3.42 The Kennall Vale mining area is relatively small and rural. As a result there are few opportunities to exploit any changes in visitors as a result of WHS inscription.

St Agnes Mining District

3.43 The St Agnes mining area stretches along the north coast from Porthtowan to Perranporth as well as inland to Mount Hawke, St Agnes and the A30/A390 at Three Burrows. The area is a well-established visitor destination, particularly along the coastal strip. Mining heritage is very apparent over much of the area, with landmarks such as Wheal Cotes on the South West Coast Path.

3.44 Again, while there is capacity for additional off-peak visitors around the coast, changes in the seasonal pattern of visiting would need to be matched by changes in the seasonal business opening patterns. There are fewer seasonal capacity issues for the rural part of the mining area, although here there are fewer opportunities to benefit from visitor activity.

Luxylan Valley/Charlestown

3.45 The Luxylan Valley/Charlestown mining area is mainly rural, although of course Charlestown and the nearby Carlyon Bay are coastal, with a significant tourism focus.

3.46 In addition to the hard rock mining which is central to the WHS bid, this mining area is adjacent to a substantial amount of china clay mining. There are initiatives seeking to exploit the china clay mining heritage, and the interpretation of the proposed WHS. There are also initiatives seeking to increase the visitor use of the Luxylan valley, at least partly linked to mining heritage.

3.47 The success of the Eden project to the North East of this mining area has introduced considerable pressure on the visitor facilities near St Austell. Furthermore, it is understood that additional facilities are planned at the Eden Project, which will continue the pressure on facilities. Therefore while there may be some opportunities to build on WHS inscription, this will need to be considered in the context of the significant existing tourism-related activity.

Caradon Mining District

3.48 The Caradon mining area is located to the north and north east of Liskeard, with a rural character. The settlements are generally small and there are relatively few visitor facing businesses. There is some room to accommodate additional visitor activity, with the A38 and A390 facilitating easy access, although the small number of visitor facing businesses limits the economic benefits.

Tamar Valley Mining District, with Tavistock and Mary Tavy

3.49 The Tamar Valley has a relatively well-established and growing rural tourism profile, strongly linked to the river ferry services from Plymouth and around Calstock, and the Tamar Valley railway line. Morwellham Quay and Cotehele are the main visitor landmarks. The recently formed Tamar Valley Tourism Association, combined with the Tamar Valley AONB have been active in growing tourism in the area.

3.50 Callington is the largest settlement in the Tamar Valley and offers a variety of visitor-facing businesses.

3.51 It is understood that there is room to accommodate more visitor activity throughout most of the year, although the best utilisation of resources will be through growing activity out of the main season. The day visit market from Plymouth presents significant opportunities, although the relatively poor road access can hamper car-borne visitors.

3.52 Tavistock offers a good variety of visitor facing businesses, as well as a reasonable accommodation stock. It is understood that the town's mining heritage is currently under-exploited and that visitors are generally seeking a rural tourism experience. The town is well placed to capitalise on further visitor activity through most of the year, although again the best utilisation of resources will be through growing activity out of the main season.

3.53 The Mary Tavy mining area is relatively small with a small population and limited visitor facilities. It is understood that the main focus for visitors to the area is access to Dartmoor. The lack of access or interpretation of the mining remains does not encourage visits.

3.54 There are planned initiatives to redevelop the SW Lakes power station in Mary Tavy, which would include an interpretation centre. While there are few facilities to exploit any additional visitor activity, there are considerable visitor facilities in the nearby Tavistock mining area. It is likely that benefits will accrue from considering the two areas together for marketing and visitor management purposes.

Discussion and Summary

Socio-Economic Profiles

3.55 The mining areas differ significantly in terms of size, population, deprivation, employment and property prices.

- Camborne and Redruth have significantly poorer wards than other mining areas, with some of the Gwennap Chacewater and West Devon wards considerable more affluent. Generally, West Devon wards are more affluent than Cornish wards
- Unemployment in Cornwall decreased in between 1997 and 2000, with the largest decreases evident in Tavistock and Mary Tavy
- There is a dominance of employment across the distribution, hotels and restaurants sector. Public administration organisations are typically larger than the private sector businesses in terms of number of employees
- Property prices have increased significantly over the last few years, with prices higher in West Devon than Cornwall

3.56 The profiles indicate that some of the mining areas are in particular need of regeneration, with the need generally greater in Cornwall than in West Devon, and the greatest need in Camborne and Redruth. Despite the falls in unemployment and the rise in the value of housing assets, the need for regeneration is still apparent and warrants the investigation of the potential opportunities afforded by WHS inscription.

3.57 The ability of areas to capitalise on economic opportunities is dependent on a complex mix of factors. This mix will include structural funds, effective partnerships, business advice and the ability of individuals and organisations to spot opportunities and exploit them. Many of these factors are in place across Cornwall and West Devon; however it is impossible to accurately assess future outcomes.

Area Profiles

3.58 The mining areas can be split into five broad categories in terms of their capacity to benefit from changes in visitor activity as a result of WHS inscription:

- Some, such as St Just, Hayle and St Agnes, are well established destinations with comprehensive visitor facilities, linked to seasonal visiting patterns mainly by staying visitors. These destinations would benefit from increased visitor activity out of season only
- Others, such as the Tamar Valley have a small but well-established tourism product relying on both staying visitors and day visitors from home. There are opportunities to increase visitor activity throughout the year, although benefits will be maximised through off-peak increases

- There are some mining areas, such as Carnmenellis, Kennall Vale (part of Gwennap) and Caradon, which are not well placed to exploit visitor opportunities because of a lack of facilities
- The mining areas around St Austell (Luxylan Valley/Charlestown) are already subject to visitor pressure throughout much of the year, partly as a result of the Eden Project
- The more urban areas of Tavistock and particularly Camborne and Redruth are well placed to receive more staying and day visitors throughout much of the year

3.59 In addition to the suitability of the mining areas to capitalise on visitor opportunities, the existing distribution of other tourism facilities, particularly accommodation stock, will have an impact on the locations within Cornwall and West Devon benefiting from visitor expenditure. Much of Cornwall's accommodation stock is in locations outside the mining areas, particularly Newquay, North Cornwall and the Cornish Riviera (central south coast of Cornwall). Therefore, visitors staying away from home in Cornwall and Devon intending to visit mining heritage are likely to stay in areas able to offer accommodation.

4 BASELINE - ECONOMIC CONTRIBUTION OF VISITORS

Introduction

4.1 This section of the study sets out the second part of the baseline from which the impact of WHS inscription can be measured. It is anticipated that WHS inscription and the activity surrounding it will have an impact on the volume and value of visitor activity. This section therefore collects and assesses the available information in order to form a baseline from which future levels of activity can be measured

4.2 The economic contribution of visitors will be a function of the visitor use of the wider study area. However, this chapter additionally looks at the visitor use of mining heritage facilities, which provides a locally based view of the impact of mining heritage.

Visitor Use of the Wider Study Area

4.3 The wider study area includes the whole of Cornwall and West Devon. Information on the volume and value of tourism, and the employment supported by visitor expenditure, is available from the *Economic Impact of Tourism in Cornwall* (West Country Tourist Board, 1998) and the *Economic Impact of Tourism In West Devon* (West Country Tourist Board, 1996). It is understood that these studies are being updated at the time of writing. While Plymouth is outside the study area, it offers a range of accommodation and other visitor facilities close to the WHS mining areas. It is also an important destination for day visits from home and from holiday accommodation outside the city. It is likely that the city will both benefit from increased levels of visitor activity resulting from the WHS, and that improvements to the tourism product in the city will add to the overall attractiveness of the area as a place to visit.

4.4 It is estimated (*Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996*) that the overall number of staying visitors to the study area is 4,349,000, of which 92% are UK resident visitors and 84% are holiday trips.

Staying Trips in Cornwall and West Devon

Trip/visitor type	UK	Overseas	Total
Holidays	3,349,000	294,000	3,644,000
Business	168,000	23,000	190,000
Visits to friends/relatives	397,000	74,000	437,000
Other	70,000	10,000	79,000
Total	3,983,000	366,000	4,349,000

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

4.5 The staying visitors spent 22.8 million nights in Cornwall and West Devon. 87% of these nights were UK residents visitors (a smaller proportion than the corresponding trips because of the longer length of stay by overseas visitors). 89% of the nights were holiday nights (again higher than the proportion of holiday trips, because holidays tend to be relatively long in duration).

Visitor nights in Cornwall and West Devon

Trip/visitor type	UK	Overseas	Total
Holidays	18,059,000	2,156,000	20,215,000
Business	427,000	121,000	548,000
Visits to friends/relatives	1,160,000	407,000	1,567,000
Other	253,000	206,000	459,000
Total	19,898,000	2,890,000	22,788,000

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

4.6 The staying visitors spent an estimated £860 million in Cornwall and West Devon.

Visitor expenditure in Cornwall and West Devon

Trip/visitor type	UK	Overseas	Total
Holidays	£695,086,000	£75,789,000	£770,876,000
Business	£25,822,000	£9,469,000	£35,291,000
Visits to friends/relatives	£28,233,000	£9,500,000	£37,734,000
Other	£9,584,000	£6,089,000	£15,675,000
Total	£758,728,000	£100,848,000	£859,576,000

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

4.7 As well as information on the volume and value of staying visitors, the studies provide estimates of the volume and value of non-local day visitors from home. These day trips involve a round trip of at least three hours away from home. The estimated 9 million day trips taken from home in Cornwall and West Devon spent £133.8 million.

Non-local Day Trips from home in Cornwall and West Devon

Day Trips (Non-local)	Trips	Spend
Coastal	2,975,000	£39,320,000
Town/City	2,448,000	£37,923,000
Countryside	4,029,000	£56,534,000
Total	9,452,000	£133,777,000

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

4.8 The combined staying and day visitor expenditure is estimated to total £993.3 million. Although the day visitors from home make up 68% of the trips, they account for 13% of the expenditure.

4.9 The total visitor expenditure is estimated to directly support 22,269 Full Time Equivalent jobs (FTE's). Linkage and multiplier effects then support a further 10,223 FTE's across a wide range of the area's economy, bringing the total estimated employment supported by visitor activity to 32,291.

Employment Supported by Visitor Expenditure in Cornwall and West Devon

Sector	Full Time Equivalent Jobs
Shops	2,140
Restaurants and pubs	7,024
Attractions and Entertainment	1,770
Garages and Transport	1,442
Accommodation	9,892
Direct FTE	22,269
Linkage & Multiplier FTE	10,223
Total Direct and Indirect FTE	32,491

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

4.10 The FTE's can also be expressed as estimates of actual jobs, by taking account of the likely proportions of part time, seasonal and casual labour in the different industry sectors. It is estimated that the combined staying and day visitor expenditure of £993.3 million directly supports almost 33,000 jobs and through linkage and multiplier effects indirectly supports a further 11,650 jobs – totalling 44,570 actual jobs.

Actual Employment Supported by Visitor Expenditure in Cornwall and West Devon

Direct Actual Jobs	32,917
Indirect Actual Jobs	11,654
Total Actual Jobs	44,570

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

Mining Heritage Visitor Use of the Wider Study Area

4.11 Pilot survey work undertaken concurrently with this study is able to explore the importance of mining heritage in motivating trips to Cornwall and West Devon. The survey had an overall sample of 567 completed visitor interviews both at mining heritage sites and at attractions with a general appeal. 46% of the sample was collected from locations either unconnected with mining or without an exclusive mining connection, and this section of the survey can be used to form a view of the importance of mining heritage to the wider visitor population. Note that while the survey is useful in forming an initial view, the sample is limited and the work was undertaken in the autumn shoulder season. Geographically, the sampling points were spread around Cornwall and West Devon.

4.12 One principle behind this section of the analysis is that trips motivated by mining heritage are leisure trips rather than trips for other purposes (such as trips for business or to visit friends and relatives). Therefore the starting point is the estimated 3,644,000 staying visitors spending 20,215,000 nights and £770,876,000 in Cornwall and West Devon. All of the 9,452,000 day visits from home spending £133,777,000 are leisure visits.

4.13 The survey work indicated that the main reasons for visiting the Cornwall and West Devon study area were that visitors had been before (indicated by 53%), the scenery (50%), plenty to see and do (38%), accommodation (19%) and atmosphere (19%).

4.14 96% of staying visitors and 100% of day visitors were aware that Cornwall has a history of mining. The major association was tin/tin mining (35% of all visitors).

4.15 The survey also asked about the importance of mining history in planning their visit.

Importance of Mining History	**Staying Visitors**	**Day Visitors**	**All Visitors**
Very Important	8%	9%	8%
Fairly Important	19%	19%	19%
Not Important	64%	63%	64%
Unsure/Don't Know	8%	9%	9%
Based on the 260 responses at general attractions in Cornwall and West Devon			

4.16 Overall 8% of visitors felt that mining heritage was very important in planning their visit and 19% said that it was quite important. There was almost no difference between day visitors from home and staying visitors.

4.17 By contrast the same question asked of visitors who were at mining heritage attractions showed that 14% of visitors felt that mining heritage was very important in planning their visit and 31% said that it was quite important. Unsurprisingly this indicates that there is a section of the market who are particularly interested in mining heritage and that this is a small subsection of the overall market. However, the majority of visitors to mining heritage attractions are not part of this special interest group and this indicates that there is a broad appeal about mining heritage sites.

4.18 In considering this proportion of the total number of visitors motivated by mining heritage it is useful to consider other evidence regarding visitor motivations.

- The *Cornwall Holiday Survey 2000-2001* (Cornwall Tourist Board) indicates that visitors are primarily motivated by the quality of the natural environment (75% of visitors). It does note that peak season visitors are less likely to put emphasis on scenery and other factors, and more likely to emphasise beaches and weather, which is important in the context of the off peak timing of the pilot study. Peak season visitor interest in scenery stood at 90% of the low season rating in terms of a reason for visiting, and peak season "Interest/hobby" reasons to visit stood at 63% of the low season equivalent. The study also noted that more affluent visitors are more likely to be interested in historic sites

- *Valuing Our Environment* (National Trust 1999) indicated that 78% of all holiday trips are motivated by conserved landscape. 6.7 million staying trips in Devon and Cornwall were motivated by conserved landscapes (defined as the managed rural environment, to include fields, woods, moors, villages and coastline)

- *Towards 2020 – A Tourism Strategy for the South West* (South West Tourism 1999) notes the importance of countryside and heritage in motivating visits

- *The Economic Contribution of Museums in the South West* (South West Museums Council 2000) indicates that the museum sector in Devon and Cornwall received 1.5 million visits. The study estimated that of the day visits to museums, 60% of the trip expenditure was motivated principally by the museum visit. For visitors staying away from home who visited museums, 5% of the whole trip expenditure was principally motivated by museums.

4.19 In this context it is arguable that mining history is in essence part of the conserved landscape/scenery, although this is particularly true of the iconic engine houses and less evident for other parts of the mining heritage. Therefore the findings from the survey work are broadly compatible with the other available evidence.

4.20 The Cornwall Holiday Survey indicates that peak season visitors are more interested in beaches and weather, and less interested in other visitor activities. This finding fits with existing views about the types of trips taken at different times of the year in the South West. The pilot survey work was undertaken solely in the autumn 2002, and because it is known that peak season visitors are more beach motivated, the pilot survey is therefore likely to over represent interest in mining heritage. For the purposes of this study it has therefore been assumed that the pilot survey does overestimate the proportion of general visitors who are interested in mining heritage, and correspondingly, the proportion judged to be primarily motivated by mining heritage is adjusted. While there is no direct basis for the adjustment, the Cornwall Holiday Survey differences between peak and shoulder season scores for natural environment and for interests/hobbies (see above) suggests that the adjustment should be to reduce the proportion motivated by mining heritage to three quarters of the survey findings.

4.21 On the basis of the seasonal evidence from the Cornwall Holiday Survey (see the *Methodology* section earlier in this report) it is considered that the pilot survey work overestimates the importance of mining heritage in planning visits. The Cornwall Holiday Survey identifies differences between peak and shoulder season scores for natural environment and for interests/hobbies. This suggests that the adjustment should be to reduce the estimated importance of mining heritage importance to three quarters of the survey findings. This gives an adjusted proportion of 6% of leisure visitors to Cornwall and West Devon considering mining heritage to be very important in planning their trip, and 14% considering it to be quite important.

4.22 Consideration of the survey work noted above and review of some of the survey work noted in the review of other evidence (in particular the English Heritage work establishing a link between heritage and the wider landscape) suggests that the 6% of visitors considering mining heritage to be very important and the 14% considering it to be quite important are essentially a subset of the 78% of leisure visitors to the South West who are motivated by the conserved landscape.

4.23 The approach taken in this study has been to include all the trip expenditure by those who consider mining heritage to have been very important in planning their trip (i.e. all of the expenditure by the 6%), and half of the spend by those considering mining heritage to be quite important in planning their trip (i.e. half of the expenditure by the 14%).

4.24 Applying this principle gives an expenditure of £119 million visitor expenditure related to mining heritage, made up as follows.

Trip Type	**Overall Volume and Value of Holiday Trips to Cornwall and West Devon**	**Spend By Visitors Considering Mining Heritage Very Important**	**Spend By Visitors Considering Mining Heritage Quite Important**	**Total Visitor Spend Related to Mining Heritage**
Staying Visitor Spend	£770,876,000	£46,253,000	£54,925,000	£101,177,000
Day Visitor Spend	£133,777,000	£8,027,000	£9,532,000	£17,558,000
Total Spend	£904,653,000	£54,279,000	£64,457,000	£118,736,000

4.25 Overall there are 3,644,000 staying visitors spending 20,215,000 nights in the study area, plus 9,452,000 day visits from home to the area. The 6% of visitors considering mining heritage very important will total 219,000 staying visitors and their 1,213,000 nights. There are 567,000 day visits by visitors to whom mining heritage is very important. In addition, 14% of visitors consider mining heritage quite important will total 520,000 staying visitors and their 2,880,000 nights, plus 1,346,000 day visits.

4.26 Visits to mining heritage attractions and facilities will essentially be a sub-set of the 478,000 staying visitors and 1.2 million day trips motivated by mining heritage. The difference between the trips to the mining heritage areas and the numbers visiting facilities is likely to be accounted for by visiting patterns that do not include the facilities and attractions listed in this report (e.g. along parts of the South West Coast Path, or to Camborne or Redruth), or to those who consider the wider impact of mining upon the landscape to be an important contribution to the character of the area.

4.27 The spend distribution of these visits can be broken down using the proportions from the *Economic Impact of Tourism in Cornwall* 1998 and the *Economic Impact of Tourism in West Devon* 1996.

Spend Category	**Mining Heritage Staying Visitors Spend Distribution**	**Mining Heritage Day Visitors Spend Distribution**	**Total Mining Heritage Visitor Spend**
Shops	£13,153,000	£3,160,000	£16,313,000
Restaurants and pubs	£24,283,000	£9,130,000	£33,413,000
Attractions and Entertainment	£7,082,000	£2,107,000	£9,189,000
Garages and Transport	£16,188,000	£3,160,000	£19,348,000
Accommodation	£40,471,000	£0	£40,471,000
Total	£101,177,000	£17,558,000	£118,735,000

Employment supported by Mining Heritage Visits to Cornwall and West Devon

4.28 Using figures from the *Economic Impact of Tourism in Cornwall* 1998 and the *Economic Impact of Tourism in West Devon* 1996 it is possible to use the spend estimates above to arrive at estimates of employment directly supported. Taken together, the studies suggest that the following expenditure is required in each sector to directly support a FTE job:

Spend Category	**Visitor Spend**
Shops	£69,513
Restaurants and pubs	£39,013
Attractions and Entertainment	£40,103
Garages and Transport	£110,530
Accommodation	£34,383
Total	£44,603

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

4.29 Using this information it is estimated that 2,672 FTE jobs are supported by mining heritage related visitor expenditure in Cornwall and West Devon.

Spend Category	**FTE jobs directly supported**
Shops	235
Restaurants and pubs	856
Attractions and Entertainment	229
Garages and Transport	175
Accommodation	1,177
Total	2,672

4.30 The 2,672 FTE jobs supported by mining heritage related visitor expenditure forms 12% of the estimated 22,269 FTE jobs supported by all visitor spending in Cornwall and West Devon.

Use of Mining Heritage Facilities

4.31 Information on the use of Mining Heritage facilities has been collected from South West Tourism and from contact with the range of facilities throughout the area.

4.32 The approach taken for this section of the study has been to estimate the value to the economy in Cornwall through combining the facility visitor figures with published expenditure figures.

4.33 Estimates have had to be made on the visitor profiles to many of the attractions and facilities. Unless there is evidence to the contrary it has been assumed that 70% of the total are visitors staying away from home and 30% are day visitors (see *Methodology* section earlier in this report). The particular exception to this has been the use of archives/records offices, where it is understood that up to 10% of the usage is by visitors staying away from home.

4.34 It is recognised that some visitor expenditure away from the attraction/facility would have taken place irrespective of the existence of the attraction/facility. Figures have been adjusted so that 30% of the daily spend is attributed to mining heritage (see *Methodology* section earlier in this report).

4.35 Some of the facilities identified have a wider appeal than mining heritage. The figures for the attractions and facilities judged through the consultation process as only partly mining heritage are discounted by 50% (again, see *Methodology* section earlier in this report).

4.36 The analysis below follows these principles. In terms of the way that the adjustments discussed above are presented, the gross figures are presented initially, with the calculations and adjusted figures shown subsequently.

Visitor numbers to existing attractions

4.37 The overall number of visits to mining heritage attractions and facilities in Cornwall and West Devon is 809,787. 409,779 of the visits are to attractions with an entrance charge, 350,074 are to attractions/facilities without an entrance charge and 49,934 are to public archives and records offices. These overall figures will represent an underestimate as not all facilities were able to supply information. The table below indicate the visitor numbers for each attraction/facility.

4.38 The table below also indicates the extent to which each attraction/facility is linked to mining heritage. This assessment of embeddedness is then used to adjust the overall visitor numbers in order to arrive at an estimate of the volume of mining heritage visits (as opposed to visits for different reasons to these attractions/facilities).

- Of the 409,779 visits to attractions/facilities with an entrance charge, 303,331 are judged to be mining heritage related
- Of the 350,074 visits to attractions/facilities without an entrance charge, 284,074 are judged to be mining heritage related
- Of the 49,934 visits to archives/records offices, 4,993 are judged to be mining heritage related

4.39 Overall, it is estimated that there are 592,398 *mining heritage visits* to attractions and facilities.

Figures are for 2000 unless stated otherwise.

Attraction	Unadjusted Visitor Numbers	Notes	Mining Heritage Element
Charging			
Blue Hills		Not Available	Wholly
Botallack Count House		Not Available	Wholly
Camborne Museum		Not Available	Partly
Cornish Mines and Engines	16719		Wholly
Cotehele	75027		Partly
Geevor	21694	Figure is for 12 months from October 2000 to September 2001	Wholly
Godolphin House	5006		Partly
Helston Folk Museum	14000		Partly
King Edward Mine	1709	Figure is for 2002.	Wholly
Levant	13561		Wholly
Morwellham Quay	46000		Wholly
Penlee Museum	36942	Figure for 1999.	Partly
Poldark	85500	Figure is for 2001, when the current owners took over the site.	Wholly
Royal Cornwall Museum	62671	The figure rose in the following year to 97,000, largely due to Eden. Figures for 2002 around 85,000	Partly
St Agnes Museum	4750		Partly
St Ives Museum	14500		Partly
Tolgus Tin	11500	Figure for 2001.	Wholly
Trevarno		Not Available	Partly
Trevithick's Cottage	200	Only open Wednesday afternoons.	Wholly
Zennor Wayside Museum		Not Available	Partly
Sub-Total	**409779**		

Source: Survey of Visits to Attraction 2000 (South West Tourism 2001) Personal contacts.

Non-charging Facilities	Unadjusted Visitor Numbers	Notes	Mining Heritage Element
Camborne Town Trail		5,000 copies of the leaflet guide printed in 1997. None since.	Partly
CSM Geological Museum	6500		Wholly
Gwennap Pit	20000		Partly
Houseman's Engine House	15370		Wholly
Kit Hill Country Park	110000		Partly
Mineral Tramways (Great Flat Lode)	194204	Total composed through: Marriot's = 108249, Cowlin's Mill = 18478, Taylor's = 67476	Wholly
Redruth Town Trail			Wholly
Rosevale Mine, Zennor	2000	Figure is estimate for 2000, the last year the mine was open to the public.	Wholly
Tamar Valley Discovery Trail	2000	Figure is for those estimated to have walked the whole trail.	Partly
Sub-total	**350074**		

Principle Public Archives and Records	Unadjusted Visitor Numbers	Notes	Mining Heritage Element
Plymouth Record Office		Not Available	Partly
West Country Studies Library and Devon Record Office	57695	Includes 30,398 postal and telephone enquiries but excludes 1,483,109 website enquiries	Partly
Cornwall Record Office		Not Available	Partly
Cornwall Centre, Redruth	49934	Figure is for the 12 months from October 2001, when the Centre opened at its present site. Also known as the Cornish Studies Library.	Partly
West Country Studies Library		Not Available	Partly
Courtney Library		Not Available	Partly
Historic Environment Record, Cornwall County Council		Not Available	Partly
Historic Environment Record, Devon County Council		Not Available	Partly
Sub Total	**107629**		

Source: Survey of Visits to Attraction 2000 (South West Tourism 2001) Personal contacts.

Type	Visitor Numbers
Charging Attraction	409779
Non-charging Attraction	350074
Public Archives and Records	107629
Total	867482
Number estimated to be mining heritage visits	598168

Visitor Type

4.40 The profile of visitors to attractions will have an impact on the overall spending related to the trip, with the split between day and staying visitor making the most impact. As noted in the discussion above, the visitor profile has been estimated using figures supplied by attractions/facilities and by use of comparable survey work.

4.41 Of the 598,168 mining heritage visits to attractions/facilities, 319,684 are estimated to be by visitors staying away from home and 278,484 by day visits from home.

Type	Total Mining Heritage Visitor Numbers	Visitors staying away from Home	Day Visits from Home
Charging Attractions	303,331	212,332	90,999
Non-charging Attractions	284,074	106,276	177,798
Archives/Records Offices	10,763	1,076	9,687
Total	598,168	319,684	278,484

4.42 By way of comparison, the top ten visitor attractions in the South West are:

Attraction	Visitor Numbers 2001	Entrance Arrangements
Eden Project	1,700,000	Paid
Roman Baths, Bath	864,989	Paid
Stonehenge, Amesbury	677,378	Paid
Bristol Zoo Gardens, Clifton	640,317	Paid
Arnolfini Gallery, Bristol	544,847	Free
Lynton and Lynmouth Cliff Railway	524,331	Paid
Crealy Adventure Park, Clyst St Mary	500,000	Paid
Exeter Cathedral	450,000	Free
Paignton Zoo	399,586	Paid
Woodlands Leisure Park, Blackawton	374,165	Paid

Source: Facts of Tourism 2001, South West Tourism. Note that there are at least two visitor attractions with comparable figures where publication is not authorised

4.43 If the mining heritage attractions and facilities were treated as one entity, then the gross number of visits to mining heritage attractions and facilities (i.e. 867,482) would rank them third in the South West, after the Eden Project and the Roman Baths in Bath. Even taking just those estimated to be motivated by mining heritage (i.e. 598,198), then they would be ranked 5th.

Expenditure

4.44 The average spend per day for staying visitors in Cornwall and West Devon in 2000 was £40.84 (UKTS 2000, IPS 2000) and the average spend per day trip in the South West was £19.56 (Day Visits Survey 1998).

4.45 Using these figures, the expenditure associated with the 319,684 staying visitor mining heritage attraction visits was £13,055,000, and the expenditure associated with the 278,484 day visitor mining heritage attraction visits was £5,447,000. This gives a total of £18,502,000 gross visitor expenditure.

4.46 Not all of the £18,502,000 will be at the attractions or facilities. The *Economic Impact of Tourism in Cornwall* and the *Economic Impact of Tourism in West Devon* studies indicate that visitor spend is distributed as per the table below:

Spend Category	**% Spend Distribution for Staying Visitors**	**% Spend Distribution for Day Visitors**
Shops	13%	18%
Restaurants and pubs	24%	52%
Attractions and Entertainment	7%	12%
Garages and Transport	16%	18%
Accommodation	41%	0%

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

4.47 Assuming that these spend distributions represent the spending pattern of mining heritage visits to attractions/facilities, then the £18.5 million expenditure will be distributed as follows:

Spend Category	**Spend Distribution for Staying Visitors**	**Spend Distribution for Day Visitors**
Shops	£1,697,000	£980,000
Restaurants and pubs	£3,133,000	£2,832,000
Attractions and Entertainment	£914,000	£654,000
Garages and Transport	£1,958,000	£980,000
Accommodation	£5,353,000	£0
Total Expenditure	£13,055,000	£5,447,000
Total Expenditure excluding Attractions	*£12,141,000*	*£4,792,000*

4.48 In practice a significant amount of the off site expenditure (i.e. not at attractions/entertainment) would have taken place irrespective of mining heritage attractions visits. As discussed in the *Methodology* section earlier in this report, the pilot survey work undertaken concurrently with this study provides the basis for adjusting the gross off site visitor spend, with an estimated 30% of the gross off site visitor spend actually driven by mining heritage.

4.49 As noted in the table above, the total off site expenditure (i.e. excluding spend on attractions) for staying visitors is £12.1 million, and the total off site expenditure for day visitors is £4.8 million. Incorporating the 30% adjustment reduces these values to £3.6 million and £1.4 million respectively. The on site expenditure can then be added back to these adjusted off site expenditure totals, bringing the mining heritage attributed expenditure by staying visitors to £4.6 million and the mining heritage attributed expenditure by day visitors to £2.1 million, with a combined total of £6.6 million. The table below details these calculations.

Spend Category	**Mining Heritage Attributed Attraction Spend Distribution for Staying Visitors**	**Mining Heritage Attributed Attraction Spend Distribution for Day Visitors**	**Mining Heritage Attributed Attraction Spend Total**
Shops	£509,100	£294,000	£803,100
Restaurants and pubs	£939,900	£849,600	£1,789,500
Attractions and Entertainment	£914,000	£654,000	£1,568,000
Garages and Transport	£587,400	£294,000	£881,400
Accommodation	£1,605,900	£0	£1,605,900
Total	£4,556,300	£2,091,600	£6,647,900

Discussion and Summary

Visitor Use of the Wider Study Area

4.50 It is estimated that the overall number of staying visitors to Cornwall and West Devon is 4,349,000, of which 3,644,000 are holiday trips. There are an estimated 9,452,000 leisure day visits from home, and the combined expenditure is £933.3 million.

4.51 96% of staying visitors and 100% of day visitors are aware that Cornwall has a history of mining. The major association is tin/tin mining (35% of all visitors). It is estimated that 6% of visitors every year feel that mining heritage is very important in planning their visit and 14% that it was quite important. There is almost no difference in motivation between day visitors from home and staying visitors.

4.52 It is estimated that the staying visit expenditure related to mining heritage in Cornwall and West Devon totals £101.2 million and the day visit expenditure related to mining heritage is £17.6 million. The combined visitor expenditure is £118.7 million.

4.53 The estimated visitors to the wider study area have a relationship both with the mining heritage visits to attractions, and also to the visits motivated by conserved landscape (explored more fully in other studies). In essence, the trips related to mining heritage will mainly be a sub-set of the larger 78% who are motivated by conserved landscape. In turn, the 598,168 mining heritage visits to attractions and facilities will essentially be a sub-set of the day and staying visits related to mining heritage.

4.54 Overall, it is apparent that mining heritage has a wider appeal in motivating trips to Cornwall and West Devon beyond prompting trips to attractions, and this is related to a wider interest in conserved landscapes.

Use of Mining Heritage Attractions and Facilities

4.55 The overall number of visits to mining heritage attractions and facilities in Cornwall and West Devon is estimated to be 867,482 in 2000. Some of the mining heritage attractions and facilities provide non-mining heritage reasons for visiting and taking this into account, it is estimated that 598,168 mining heritage attraction visits were made in 2000.

4.56 It is estimated that 319,684 of the 598,168 visits are by visitors staying away from home and 278,484 are day visits from home. Taking into account spend which would have taken place irrespective of the mining heritage attraction, it is estimated that the on and off site visitor expenditure related to mining heritage facilities was £6.6 million. It is estimated that 27% was on accommodation, 24% in restaurants, pubs and cafes, 24% on attractions and entertainment, 13% on garages /transport and 12% in shops.

4.57 If the mining heritage attractions and facilities were treated as one entity, then the gross number of visits to mining heritage attractions and facilities would rank them third in the South West, after the Eden Project and the Roman Baths in Bath.

4.58 This analysis indicates that mining heritage attractions and facilities already play a significant role in generating economic expenditure through on and off site visitor expenditure. This impact is across a number of different sectors of the economy in addition to the core visitor-orientated facilities.

5 MINING HERITAGE CONSERVATION

Introduction

5.1 This section of the study sets out the third part of the baseline from which the impact of WHS inscription can be measured. It is anticipated that WHS inscription and the activity surrounding the designation will have an impact on the mining heritage activity.

5.2 There are three elements to the mining heritage conservation element of this section of the report:

- Mining heritage projects
- Mining heritage contractors
- Other businesses supported

Mining Heritage Projects

5.3 In advance of WHS inscription there have been a number of significant projects undertaken conserving and improving access to mining heritage in Cornwall and West Devon. Many of these projects are the result of the Land Reclamation programme, which sought to remediate contaminated land. Although this programme would have happened irrespective of the WHS bid, the style and execution of projects has been strongly orientated towards the preservation of mining heritage as awareness of the importance of the resource has grown.

5.4 The study has identified 29 mining heritage conservation projects 1994 -2004 (listed in the appendix to this report). There is evidence available for some of the projects on the temporary employment supported during the construction/conservation phase of the project.

5.5 For those projects without evidence available estimates of the number of FTE jobs/year have been generated based on the cost of the project. These costs have been combined with estimates of the labour cost content of the tasks (*Economic Impact of the Overall Mineral Tramways Strategy*, Groundwork Kerrier 1996), and the average wage rates for the construction industry in the region, £16,214.64 p.a. (2000 *New Earnings Survey ONS*) in order to arrive at estimates of employment supported. The *Economic Impact of the Overall Mineral Tramways Strategy* used evidence from mining heritage projects to determine the labour cost content of different types of project, and these assessments have been used to estimate the payment to labour. In addition, those projects which include an element of property acquisition have had the costs amended.

Project Type	Labour Cost Content
Building Conservation	90% labour
Shaft Capping	40% labour
Landscaping	60% labour
General Combined Schemes of Work	40% labour

Source: Kerrier District Council in *Economic Impact of the Overall Mineral Tramways Strategy*, Groundwork Kerrier 1996

5.6 The 29 projects have a total cost of £32,092,000. It is estimated that this expenditure supported 864 FTE job years, giving an average of just over £37,000 of overall expenditure to support a mining heritage construction job.

Mining Heritage Contractors

5.7 A potential direct economic impact of WHS status is considered to be growth in the conservation of mining heritage assets. To some degree this includes shafts and adits, but mostly the assets are above ground in the form of mining buildings and the landscapes immediately around them.

5.8 Businesses in the area rely on various agencies' spend on conservation projects. The starting point for this part of the study has therefore been the tender lists of partners, including Cornwall County Council and the National Trust.

5.9 Consultations indicate that heritage conservation has already had an impact on building the capacity of businesses in the study area. For example, it is estimated that the number of building firms specialising in lime mortar repairs has changed from one to three or four over the last five years, and that traditional stone roofing, stone working and Cornish hedging skills are kept alive through the more stringent requirements for buildings or areas with heritage designations. In addition, the requirement to use traditional materials for such work has helped to support other businesses, such as Delabole Slate.

5.10 In addition to standard applications of traditional building skills, conservation work around mining heritage sites has required the use of skills relating to dealing with ivy and the construction of bat shafts.

5.11 The majority of businesses consulted had heard of the WHS bid. Some made similar points concerning the capacity of the sector to absorb more work should additional conservation projects be developed. There is a belief that a number of individuals who had worked on some of the more technical tasks during the slight boom in such projects in the late eighties to late nineties have gone on to do other building work since, but in effect represent a latent reservoir of specialist skills that can quite easily be tapped.

5.12 Forty two businesses have provided data for this part of the study. A further five could not be contacted. They were asked: number of employees; percentage of staff time spent carrying out mining-related work in Cornwall and West Devon; percentage outside those areas; and what additional skills or training they required to do the work, if any. The data is provided as an appendix to this report.

5.13 The data shows that the conservation of mining heritage assets in Cornwall and West Devon supported at least 119.6 full time equivalent jobs in 2000, 119 of which are actually based in those areas.

5.14 This skills base relies upon work being made available in local areas, but it further supports work being exported beyond Cornwall and West Devon. The conservation of mining heritage assets has been carried out by firms based in Cornwall and west Devon elsewhere in the UK and in Ireland, Greece, Romania and South Africa. This export of skills outside the WHS bid area supports at least 22 full time equivalent jobs in 2000. In addition, one company based in Cornwall carries out the majority of its work elsewhere in the UK, which supports a further 49 full time equivalent jobs.

5.15 These businesses are involved in such task as shaft capping, stabilising chimneys, engine houses and other buildings, landscape work around buildings, and the exploration and mapping of underground assets.

Other Businesses Supported

5.16 The conservation of mining heritage indirectly supports many jobs, in particular throughout the tourism sector. However, certain businesses derive their income wholly or partly as a direct result of conserved mining assets existing. These include cafes (at Geevor and Poldark), publishers of guides to mines and mine remains, and specialist walking tour operators.

5.17 It has only proved possible to contact a proportion of businesses in these sectors. However, discussions held with representatives of all three areas suggest the following:

Sector	FTE jobs supported by mining conservation in 2000
Cafes and restaurants	6
Specialist publishers	3
Walking tour operators	3.5
Total	12.5

5.18 This suggests a minimum of 12.5 FTE’s directly supported by mining heritage in these sectors.

Discussion and Summary

Mining Heritage Conservation

5.19 Expenditure on mining heritage conservation projects 1996-2004 has supported 864 FTE job years, an average of 96 jobs per year over the nine years.

5.20 The conservation of mining heritage in Cornwall and West Devon currently supports 131.5 full time equivalent jobs in the area, of which the majority (119.6) are in construction related companies. In addition to this figure, the presence of specialist conservation skills in the area means that a number of firms that are located here can export this knowledge beyond the broad WHS bid area – work that supports a further 71 full time equivalent jobs.

Mining Heritage Baseline

5.21 By combining the estimates of jobs supported by visitor activity and through mining heritage conservation, it is possible to arrive at a baseline estimate.

- 2,672 FTE's are supported in Cornwall and West Devon through mining heritage generated visitor expenditure
- Cornwall and West Devon mining heritage conservation work supports 119.6 FTE's
- Export mining heritage conservation work supports 71 FTE's

5.22 This gives a baseline employment estimate of 2,862.6 FTE jobs supported in Cornwall and West Devon.

6 REVIEW OF EVIDENCE

Introduction

6.1 This section of the study reviews the following evidence

- Tourism trends and forecasts for the region and sub-region, in order to gain an understanding of the key characteristics of tourism in the region, the impact of recent changes and the way that the industry is likely to change in the future

- A review of other projects and studies around the theme of heritage, environment and mining heritage. The bulk of the studies are rooted in the South West of England, but where relevant, information from other locations has been included

- A review of the other five industrial heritage WHS sites in the UK, as well as two other UK WHS sites of relevance. Typically this review has been based around documentary evidence and consultation

- A review of the proposed marketing and product development activity for the Cornwall and West Devon Mining WHS

- A series of consultations with key organisations with an interest in or developmental role for mining heritage in Cornwall and West Devon

6.2 The section then considers the available evidence on the impact of WHS listing.

Tourism trends and forecasts

6.3 The period from 1989 to 2001 (United Kingdom Tourism Survey and International Passenger Survey) saw substantial increases in the volume of staying trips to both Cornwall and Devon and across the South West. However the volume of nights spent in Devon and in Cornwall has changed very little, indicating that the length of stay has fallen from an average of 7 to 4.8 nights in Cornwall, and from 5.9 to 4.1 nights in Devon.

6.4 While the percentage of staying visitors coming from overseas was 8% in 2000 in the region, both Cornwall and Devon typically have a lower proportion - 6%, and over the years, the percentage of visitors from overseas is generally lower in Cornwall than in Devon. The length of stay for visitors from overseas is greater than average, 7.7 nights in Cornwall in 2000, and 8.4 in Devon. The length of stay for visitors from overseas has not demonstrated the same changes as the length of stay for visitors from within the UK.

6.5 Regionally, tourism trips demonstrate a seasonal pattern, with 36% of the annual total of UK resident trips and 40% of the annual total of overseas trips being taken between July to September. Given that the regional tourism profile is predominantly holiday makers (72% of UK resident trips), it is likely that similar season patterns are evident in Cornwall and West Devon.

Seasonality of Tourism in the West Country

% of trips	**2001**	**2000**	**1999**	**1998**	**1997**	**1989**
UK Resident Visitors						
January-March	16	15	14	14	14	15
April-June	24	27	26	27	27	26
July-September	36	39	38	38	38	43
October-December	25	19	22	21	22	16
Overseas Visitors						
January-March	15	14	15	13	15	13
April-June	30	29	27	26	24	23
July-September	40	40	42	44	44	47
October-December	16	17	16	17	17	17

Source: United Kingdom Tourism Survey and International Passenger Survey

6.6 However, it is apparent that over time the seasonal peak of visitors in the third quarter of the year is gradually being diminished, from 43% of UK resident trips in 1989 to 36% in 2001, and from 47% of overseas trips in 1989 to 40% in 2001.

6.7 As well as the capital and interpretation projects being undertaken in Cornwall and West Devon in support of the WHS nomination, there are other significant projects outside the mining heritage sphere that could have an impact on the volume of visitors:

- The development of the third biome at the Eden Project
- The opening of the National Maritime Museum, Cornwall, in Falmouth
- The potential Phase 2 development at the Tate Gallery, St Ives

6.8 In relation to these and any other visitor-related developments, there are both positive and negative effects on the likely volume of visits to the sites making up the proposed WHS area. New, high profile, facilities are likely to displace visitors from other sites in the area. Conversely, however, new regionally significant facilities may serve to grow the overall visitor market in the sub-region and provide a larger pool of visitors in the area from which to attract patronage for the WHS. The Tate Gallery, St Ives and particularly the Eden Project have demonstrated that they have attracted new visitors to the region and it is likely that the National Maritime Museum, Cornwall will also have some impact in this respect.

6.9 The English Tourism Council's *Perspectives on English Tourism*, 2000 reviews changes in the volume and pattern of tourism in England during the 1990's:

- There has been a movement towards 1-3 night trips at the cost of longer trips (for domestic trips, an increase of 61% from1990 to 1999), leading to a 'little and often' pattern of holidays. In 1990 31% of domestic trips were 'secondary' holidays, by 1999 this had increase to 60%. Competition from near-Europe is strong in this sector, partly fuelled by low cost air travel. The South West continues to have a disproportionate amount of longer holiday trips however.

- Towns and cities have been increasing their share of trips

- Although the volume of tourism in the UK has grown over the 1990's (an increase in domestic trips of 59% and nights by 27%), the increase in discretionary income and the large rise in UK residents taking trips overseas suggest that UK performance is not strong. Trips by overseas residents have also demonstrated steady growth, although this market has been affected by the relatively strong pound and concerns about terrorism.

- Consumers are increasingly looking for value for time as well as value for money. This is reflected in a desire for distinctiveness and authenticity. There will be a new focus on nostalgia, roots, other cultures and identities, and interactive experiences becoming more important than passive ones. Visiting heritage sites accounted for 20% of activities carried out on a holiday trip to the South West.

- Forecasts indicate that discretionary income will rise, with the rich likely to benefit the most. The top end of the market is most likely to take an additional weekend in Britain, but those on lower incomes may well decide to spend additional income going abroad.

- There has been an increase in the volume of leisure day visits. Nationally, 73% of day trips are to urban destinations.

- Currently there is almost a third fewer people aged 60+ than there are young adults aged 20-39. By 2020 the groups will be about equal and by 2030 it is predicted that older people will outnumber young adults by 20%.

- Families with younger children are more likely to have domestic holidays while those with older children increasingly go on trips abroad. This relates to logistical problems taking small children abroad and the ever more sophisticated holiday demands from older children.

6.10 South West Tourism's *Regional Tourism Forecasts 1999-2010* provide information on past and expected changes in tourism in the South West:

- UK resident 4 plus night trips to the South West have grown from around seven million in 1989 to over 8 million in 1999 – a growth of about 17%. However at the same time, 1-3 night trips grow from just under 3 million to 5 million – a growth of 76%. UK resident secondary holidays have increased their proportion from 40% in 1989 to 50% in 1990.

- Between 1989 and 1999 UK resident trips to Cornwall increased by 30%, nights by 9 % and spend (at 1999 prices) by 11%. Devon saw a 25% increase in the number of trips, a 2% increase in nights and a fall of 2% in spend.

- Visitors from overseas are dominated by the USA, Canada, France, Germany, Netherlands and Australia. Between 1989 and 1999 increases mainly came from Germany and the Netherlands. Cornwall had an increase in visitors from overseas of 30% and Devon an increase of 10%.

- The forecasts suggest that between 1999 and 2010 the overall number of UK resident trips to the region will move from 19.1million to 26.8 million (+40%). Within this, 1-3 night holiday trips will change from 5.1 million to 9.4 million (+84%) and 4+ night holiday trips from 8.3 million to 8.5 million (+2%).

- The predicted changes in the number of trips will result in nights spent by domestic tourists in the region changing from 75.7 million in 1999 to 102.3 million in 2010 (+35%). Correspondingly, spend will change from £2,879 million in 1999 to £3,583 million in 2010 (+24%).

- Trips to the region by overseas residents are predicted to grow from 1.6 million in 1999 to 2.0 million in 2010 (+25%). Nights are predicted to grow from 11.9 million to 14.8 million (+24%) and spend from £500 million to £743.9 million (+49%).

- The report notes that the changes between 1989 and 1999 encompass significant public and private sector investment in the tourism industry (e.g. Objective 5b and 2 programmes, lottery funds etc.). Therefore the changes have been a result of the changes in demand and the changes in supply and the relationship between them. Furthermore, the forecasts rely on similar levels of investment in the supply of facilities. As a result, the forecasts could already include an allowance for high profile well-funded initiatives – such as WHS status.

Review of Other Studies

Attitudes to Heritage

6.11 Research carried out by MORI for English Heritage in 2000 investigated British 'Attitudes towards the Heritage'. The research reported:

- People are likely to consider the wider environment (such as the countryside and landscapes) to be part of the heritage or historic environment.

- The things which most people spontaneously relate to both heritage and the 'historic environment' are historic buildings and palaces.

- The value placed on heritage is divided along lines of social class, geography and ethnicity. People in the AB social classes, and South East and North East residents, are much more likely to think the heritage plays a valuable role. 38% of white people, 30% of black people and 25% of Asians say that heritage plays a valuable role in the cultural life of the country.

- The survey reinforces the growing trend for a need for meaning in British society. As traditional institutions hold less significance in the life of the country, people look in new directions to help define where they personally fit in. In a rapidly changing society heritage and the historic environment represent something constant and reliable.

- Recommendations included ensuring the industry recognised the need to operate as a commercial visitor attraction, with different marketing targeted to different groups.

Regeneration Impacts

6.12 English Heritage's *Conservation-led Regeneration* (1998) indicates that pump priming heritage investment can lever substantial additional funding. It notes that from 1994 to 1998 the £50.8 million English Heritage Conservation Area Partnerships funding had generated an overall investment of £300 million in sustainable regeneration.

English Heritage's *The Heritage Dividend* (1999) assesses the results of English Heritage regeneration from 1994 to 1999. Using data from 31 Conservation Area Partnership schemes and two Buildings at risk programmes it indicates that across the 31 case studies the £4 million English Heritage funding levered £12 million private sector investment and £7 million further public sector investment. Qualitative benefits include the increased business and community confidence from converting derelict buildings into contemporary economic use, and the way in which this sends out powerful signals to other property owners and potential investors. Schemes included the Conservation Area Partnership scheme in Redruth. This included the West End Stores scheme, the Alma Place scheme and the restoration of Market Yard. The regeneration of the former Post Office in Alma Yard includes the Cornish Heritage Resource and Information Centre. Quality of work featured highly in this scheme. Heritage can act as a major catalyst to sustainable urban regeneration, for example through English Heritage and Heritage Lottery Fund conservation area based schemes, such as Townscape Heritage Initiatives (THI) and Heritage Economic Regeneration Schemes (HERS), and the restoration and re-use of individual historic buildings.

- For every £10,000 of heritage investment in such heritage-led regeneration schemes, £46,000 is levered in from private-sector and public sources.

- Together this investment creates one new job; safeguards one job; improves one dwelling; improves 41 sq. metres of commercial floorspace, and results in 103 sq. metres of environmental improvements.

- Between 1998 and 2002 £2.6 million has been committed to THI and HERS schemes in Liskeard, Redruth, Falmouth, Hayle, Camelford, Penryn, Bodmin, Looe and Helston; levering in an additional £12 million to the Cornish economy.

- In 2001/2 English Heritage offered grants totalling over £1.6 million for the repair of individual historic buildings in the South West region.

- Nationally, rental values for listed office buildings rose by 6.5% in 2001 compared with 3.8% for unlisted offices.

6.13 *Power of Place* (English Heritage, 2000) looks at the future of England's historic environment. It notes that historic designations, such as listing, often adds to the value of private houses, despite the extra responsibilities. In 1998 the investment return on listed office property was 11.9% compared to 11.4% for unlisted property. There are also less tangible benefits from business location in historic buildings in terms of associated value.

6.14 *Valuing Our Environment* (National Trust 1998) included an assessment of the way that conservation organisation expenditure generated economic activity. In particular, it noted that 59% of the purchase of goods and services in Cornwall was from within the County and a further 20% was from elsewhere in the South West Region. The study estimated that one job will be generated per:

- £50,000 turnover in the construction sector, reflecting the mix between suppliers of materials where turnover-job ratio is likely to be lower and specialist craftsmen employed on a contract basis where the ratio will be higher
- £25,000 turnover in the services sector, reflecting the relatively high proportion of turnover represented by wages in that sector
- £100,000 of turnover in the supply sector reflecting the warehouse distribution function of many suppliers
- £100,000 turnover in the other spend sector

6.15 Of the jobs supported by the National Trust expenditure in Cornwall, 63% were in the county, and a further 17% were in the South West. The study estimated a ratio of one Full Time Equivalent job per 1.14 actual jobs.

6.16 The study estimated that 61% of the day trips by holiday makers were pre-planned prior to coming on holiday and 92% of trips by day visitors were pre-planned.

6.17 *Mines and Quarries: Industrial Heritage Tourism* (Universities of Wales and Barcelona, 1996) notes that the typical size of installations makes maintenance costly, with the degraded environment in the local areas discouraging other activities or investment, and that the location of these facilities is often peripheral to tourist circuits. This will discourage investors in mining heritage projects. The document also suggests however, that tourism can help as a catalyst for entrepreneurship. The document considers the role of mining heritage in locations normally associated with other forms of tourism – in this case, Spain. It notes that Spain has neglected alternatives to its main sun/sea/sand (and some winter sports) because of a narrow definition of heritage and an unawareness of the potential of mining and industrial tourism. The document also notes that industrial heritage attractions have the greatest chance of success if they are part of a wider range of tourist attractions in the locality.

6.18 *The Impact of Visitor Centres in Rural Areas* (Countryside Agency 2000) indicated that establishing visitor centres in rural areas can provide economic benefits. A systematic calculation of the local economic benefits (based on the eight visitor centres studied) suggest around 11 Full Time Equivalent jobs created. Additionally, such centres are often seen as providing a focus for the area, an additional attraction, and a point of communication. Some centres stimulate additional enterprises on site or in the neighbourhood. Centres potentially have a strong influence on visitor behaviour, encouraging people to go to places they might not have otherwise, or generating repeat visits. However, long term viability is a weakness.

6.19 *The Economic Impact of Recreation and Tourism in the English Countryside* (Countryside Agency 1998) indicated that total visitor spend on trips to rural areas in England (including staying visitors from within the UK and overseas, plus day visitors from home) was £11,545 million. £2,111 million of this was in the South West, split 26% UK resident staying visitor, 4 % overseas resident visitor and 70% day visitor from home. Some of this spend (especially transport spend) will take place at the trip origin, and so the estimated spend actually in rural areas in England is estimated to be £10,626 million, split 14% on accommodation, 12% on retail, 43% on catering, 18% on attractions and 13% on transport. The spend is estimated to directly support 290,000 jobs, with another 49,600 supported through linkage and multiplier effects. The South West takes 56,810 of the directly supported jobs and 9,550 of the linkage and multiplier jobs.

6.20 *The Economic Contribution of Museums in the South West* (South West Museums Council 1999) estimated that:

- Each FTE job in museums supports around 1.43 FTE's throughout the South West Economy
- Each £1 million of output from South West museums supports around £0.74 million of output elsewhere in the South West economy.
- Each £1 million of GDP from South West museums generates a total of £1.61 million of GDP throughout the South West.
- The employment multiplier for the museum sector as a whole is slightly larger than those for retail distribution and for hotels and catering, but is comparable with that for education.

6.21 *Creative Industries Exports: Our Hidden Potential* (DCMS 1999) looks at how Government assistance on export promotion can serve the needs of the UK's creative industries. It found that;

- The main markets for the export of heritage conservation services are the emerging countries, covering Eastern Europe, Asia and the Middle East, which wish to develop heritage resources and require technical skills, institutional development and training. There is a small market in the less developed countries where donor agencies do put some funding into key heritage projects. By contrast developed countries such as Western Europe and the USA have an established heritage focus and therefore international collaboration is more common than commercial interest in heritage development services.
- The fragmentation of the heritage conservation sector in the UK is seen to be a weakness, although bodies such as the Museums and Galleries Commission, the Museums Association, ICOMOS UK and the British Consultants Bureau fulfil some of these functions. Additionally, responsibility for this sector is split between British Trade International and the British Council and there is no clear

channel for the gathering of information on market opportunities. There is also a lack of authoritative and usable databases about the UK resource in heritage services (although the Museums and Galleries Yearbook fulfils this role for part of the sector). While there are opportunities to be involved in trade missions overseas, there is a need for the UK resource to take more advantage.

6.22 *The Historic Environment: A Force for Our Future* (DCMS, 2001) states government policy for the historic environment. It notes that the Building Skills Action Group in partnership with English Heritage and the Construction Industry Training Board aims to promote practical training in traditional construction skills. English Heritage will co-ordinate work to ensure that there is a coherent approach to meeting skills requirements.

Local Projects

6.23 The Mineral Tramways Portreath to Devoran multi-use trail was developed between spring 2000 and autumn 2001. Research undertaken on behalf of the Cornwall County Council Environmental Projects Team amongst local businesses in October 2001 indicated that:

- 66% of businesses indicated that visitor numbers on the trail affected their business, and those that had not seen an impact expected more business in the future, particularly with improved marketing. Although none of the businesses contacted had yet taken on extra staff, there was evidence of extra small scale investment as a result of the trail, with 20% of the businesses contacted having taken action and 40% planning action.

- Businesses indicated that better marketing of the trail was important.

- Many businesses were confident that there would be increased turnover created by the trail in the future, although most were reluctant to make substantial investments until there was further evidence of impacts.

6.24 During 1995-2001 the village of Porthowan underwent a range of improvements and environmental enhancements, at a cost of £1.1 million (of which £500,000 was social housing development). Work included conservation of historic buildings at Tywanhayle Mine and the use of traditional materials. Impacts included:

- A rise in the number of businesses from 6 to 10.

- At least seven new Full Time Equivalent and two new part time jobs created.

6.25 The Economic Impact of the Overall Mineral Tramways Strategy was researched in 1996. The study looked at 55 Mineral Tramways sites schemes, some of which had been undertaken already, and others which were planned. Over £6.3 million had been spent and a further £2.8 million committed for the future.

- The most tangible direct output at the time was the temporary construction and related employment created as a result of the physical improvements to the area (180.9 directly supported FTE's and 97.7 indirectly supported FTE's). There was also the permanent direct employment created or safeguarded in the attractions, visitor centres and in Groundwork Kerrier (6.5 directly supported FTE's and 3.25 indirectly supported FTE's).

- The report also identified a further 128.2 direct, indirect and induced Full Time Equivalent jobs as a result of associated construction projects. It also identified 34 expected temporary FTE jobs, 246 new permanent FTE jobs and 150 safeguarded FTE jobs associated with environmental improvements and visitor facilities.

- Survey work indicated that the majority (67%) of Mineral Tramways users were locals, most of which had used the route/site before.

- The study concluded that economic benefits from visitor activity were curtailed by a lack of awareness and co-ordinated marketing activity, which held back growth in visitor numbers. As a result there was relatively little associated commercial development at that time.

6.26 The Station Road Footway Project has recently been undertaken to link the village of Perranwell with the Mineral Tramways Coast to Coast Trail. This link enables walkers to access the village's post office and stores, pubs, garage and B&B, as well as access to the railway station. Total project cost is £59,000. It is estimated that the footpath will bring an extra 5,700 visitors to the village's business premises and increase sales by an average of 14%, leading to an estimated 2 full time and 5 part time jobs. Importantly, the project benefits from active support from the businesses affected and from the Devon and Cornwall Rail Partnership. Through the latter the project will be promoted in the Truro to Falmouth Line Leisure Guide, the Summer/Winter Timetable and the 'Rail-Ale Trail' and 'Walks from the Railway' leaflets (distributed through stations across the South West and South East of England).

6.27 Bissoe Tramways Cycle Hire is on the Coast to Coast Mineral Tramways Trail. Discussions indicate that business is seasonal, with 70% of volume occurring during the school summer holiday period. School half terms and Easter are also busy. As well as independent groups, the business receives group business – for example groups from Exeter College outdoor instructors courses and Army units. It is believed that there is a reasonable awareness of the importance of mining heritage amongst businesses, backed up by relatively substantial numbers of books about the mining trails and by mineral samples. The books and samples are aimed at the general rather than specialist market and give some insight into the potentially wide appeal of mining heritage. Business has continued to grow in 2002, with numbers of bike hires 40% up on 2001 and a peak of 1995 bike hires in August 2002.

6.28 A 1997 study of the Camel Trail (as quoted in the *Spanning the Century Business Plan* Cornwall County Council 1998) counted 285,000 people using the Wadebridge to Padstow section of the Trail, of whom 70% were from outside Devon or Cornwall. The average daily spend per person was £12.91, giving a total expenditure of £2,582,000. This expenditure was estimated to support 44 jobs. The study included evidence from a number of individual businesses on employment supported through visitor activity and expenditure, and these included bike hire shops, wildlife shops, tea rooms, pubs, other catering businesses. The business plan noted that a key constraint to usage was overcrowding on some sections.

6.29 A 1993 survey for the Minions Area Heritage Project noted that the most common factors that attracted visitors were ancient sites (29%), peace and quiet (28%) and scenery/landscape (23%). The survey report felt that few people were aware of the significance of mining remains (9%).

Other World Heritage Sites

6.30 Of the 24 inscribed sites in the UK, there are five which have a particular relevance to industrial heritage:

- Ironbridge Gorge – Located near Telford, Ironbridge Gorge contains the elements of progress developed in an 18th century industrial region. The WHS contains a number of museums as well as the iron bridge itself.

- Blaenavon Industrial Landscape - Located in the Welsh Valleys, Blaenavon includes coal and ore mines, quarries, a primitive railway system, furnaces, the homes of the workers, and the community social infrastructure.

- Derwent Valley Mills – Located in central England, the site contains a series of 18th and 19th century cotton mills and an industrial landscape of historical and technological interest. The workers' housing associated with this and the other mills remain intact and illustrate the socio-economic development of the area.

- New Lanark - New Lanark is a small 18th century village set in a sublime Scottish landscape where the philanthropist and Utopian idealist Robert Owen moulded a model industrial community in the early 19th century. The imposing cotton mill buildings, the spacious and well-designed workers' housing, and the dignified educational institute and school still testify to Owen's humanism.

- Saltaire – Located in West Yorkshire, Saltaire is a complete and well-preserved industrial village of the second half of the 19th century. Including textile mills, public buildings and workers' housing, the urban plan survives intact, providing a view of Victorian philanthropic paternalism.

6.31 In addition, the Dorset and East Devon Coast World Heritage Site is of interest because of its geographical proximity, and also because of its linear nature crossing political and administrative boundaries; and Hadrian's Wall because of its dispersal across political/administrative boundaries.

Ironbridge Gorge

6.32 The Ironbridge Gorge Management Plan aims to provide objectives for the management of the WHS landscape, outline a sustainable approach, increase public awareness and establish a prioritised programme of action.

- There are between 250,000 to 300,000 visitors to the Ironbridge Museums per year, and other visitors to the WHS increase this to a total of about 600,000.

- Across the whole of Telford and Wrekin, there were approximately 2.6 million visitors in 1998/9, spending £76 million. This expenditure directly supported 1,930 jobs and indirectly supported 620 jobs. 18% of the direct jobs were in the accommodation sector, 33% in catering, 28% in retail, 17% in leisure attractions and 4% in transport. While not all the visitor activity in the district is within the WHS, Ironbridge Gorge is the main visitor attraction and is deemed responsible for generating a significant proportion of the area's tourism income.

- Approximately 55,000 school children a year undertake part of the formal education through the extensive schools programmes of the Museum Trust. The Ironbridge Institute, part of the University of Birmingham, undertakes post-graduate training courses in Industrial Archaeology and Heritage Management.

- 85% of visitors arrive by car and most of the remainder by hired coach. The main visitor season is between Easter and the end of October. The seasonal pattern of visits is increasingly evenly spread over these months, partly in response to the Museums Trust marketing strategies.

- There has been a steady increase in visitors taking short breaks in the area, often with cultural tourism as the main objective. This has been at the expense of the main holiday family visit. This change has also been reflected in the increased proportion of visitors who are over 50. School and other educational party visitors have remained steady at about 20% of the total museum visitors. Visitors staying away from home consistently make up 50% of those visiting museums.

- Overseas visitors account for 8% of visitors. For visitors from the UK, all social groups are well represented (and much less skewed towards the A and B socio-economic groups than, for instance, visitors to National Trust properties).

- There is widespread use of the footpaths and cycleways, including regular use by those living in and around the area.

- The Ironbridge Tourist Information Centre deals with about 50,000 enquiries a year. Visits to www.ironbridge.org.uk are currently 300,000 per year.

- Public and private agencies concerned with tourism have worked together through an effective marketing partnership which involves different types of accommodation and the various visitor attractions. The partnership aims to progressively increase the proportion of visitors staying in the area (to provide more economic benefits), although there is a recognition that the majority of tourism earnings are from day visitors. The historic role of Ironbridge Gorge as the 'birthplace of industry' presents significant marketing and promotional potential.

6.33 Recent visitor research on behalf of the Ironbridge Gorge Museum Trust indicates that 69% of visitors were unaware of the area's WHS status. It also indicated that visitors viewed WHS status as offering protection to the site (like listing a building), and that it would encourage tourists to visit, particularly from overseas. Additionally, visitors thought that the status would enable the area to access funding.

6.34 Discussion indicates that WHS inscription did not produce a step change in the volume or type of visits, partly because Ironbridge had already built a reputation as a centre for industrial heritage. It is understood that the managing organisations did not immediately exploit the WHS status for marketing, and indeed even after 16 years, the WHS 'tag' is still not always used in marketing or promotional activities and there remains work yet to be undertaken in signing the boundaries of the WHS site. During the 1980's visitor numbers increased year on year, and that it is not possible to specify what part of this growth was due to the WHS status and what is due to other factors (such as Ironbridge's existing reputation, and underlying wider changes in the pattern of tourism).

6.35 However, WHS status has had some specific impacts:

- The introduction of a WHS Co-ordinator post in the Local Authority and the protection of other Local Authority funding on the site.
- Significant role in securing funding from the Regional Development Agency
- Production of the Management Plan, which sets out a co-ordinated set of actions to conserve and utilise the WHS site as well as providing an effective bidding support document to secure funds from ERDF, HLF and English Heritage programmes. WHS status has helped to secure ERDF-based funding of between £4m-£5m, of which approximately 30% is from the EU.
- The WHS is affected by flooding and land instability issues, which will have significant costs to undertake the necessary work. The UK government is being lobbied to help protect the site and funds have been received through the SSA to undertake research on this issue and undertake some immediate remedial road repairs. It is understood that WHS status has afforded a priority which might otherwise not been gained
- Support for the Birmingham 2008 City of Culture bid, which draws upon the cultural assets in the wider area as well as within the City

6.36 Discussion also indicates that awareness of WHS sites is generally low in the UK and that DCMS and the Local Authority World Heritage Forum is seeking to address this issue. The management plan includes elements to raise awareness of the local population.

Blaenavon Industrial Landscape

6.37 Blaenavon was inscribed as a WHS in 2001 and includes the town of Blaenavon itself as well as the Big Pit Museum and a number of archaeological sites.

6.38 Studies have been undertaken into the economic impact of the Big Pit Museum and of the likely impacts of the wider Blaenavon regeneration scheme (which includes a matrix of projects situated in and around the town):

- The estimates for the Big Pit Museum are based on projected visitor figures for 2004-5 of 125,000 visitors (management responsibility for the museum has recently passed to the National Galleries and Museums of Wales and it is understood that the resulting free admission has seen visitor numbers move from 83,000 in 2000 to an expected 102,000 in 2001). The museum is estimated to spend £1.1 million (£1998), of which £1.03 million will occur in Wales. Using an input-output framework it is estimated that £759,000 of output is supported by suppliers to the facility and associated multiplier effects. In addition to the estimated 50 employees at the site, another 13 Full Time Equivalent Jobs (FTE's) are supported through expenditure with suppliers and the associated multiplier effects. The modelling suggests that £20,600 worth of output will support a job directly, and that £56,100 of indirect output will support a job.

- In addition to the facility spend through Big Pit, there will be the impact of off-site expenditure by visitors. The process includes the balance of the daily spend by staying and day visitors (as drawn from national surveys), and based on the 125,000 visitors (split 60:40 day:staying), totals £675,000. Taking account of the elements of this spend comprising taxes or leakages, the net initial output demanded through off-site visitor spend will amount to £430,000 (64% of the original). Multiplier effects will then add £200,000 to this total (47% of the original). The off-site visitor expenditure will directly support 13 FTE's, and will then also support another 3.5 FTE's through multiplier effects. The modelling suggests that £33,000 of net off-site expenditure/output (or £52,000 of gross off-site expenditure) is required to support a FTE, and that £57,000 of multiplier output is required to support a FTE.

- Overall, the combined Big Pit facility spend and off-site visitor spend generated output of £2,389,000 brought £823,000 income to Welsh residents, supported 79.5 FTE's and added £930,000 GDP.

- The matrix of WHS projects in and around Blaenavon includes projected 2001-4 construction expenditure of £19.42 million. It is estimated that £15.5 million will be within Wales (80%) and that multiplier effects will add another £8.8 million (57% of the spend within Wales). The direct labour content of the development activity supports 410 person years (or, put another way, about 100 persons per year). Indirectly, an additional 170 person years will be supported, mainly in the Construction, Retail & Wholesale and Finance & Business sectors. The modelling suggests that £38,000 of net construction expenditure (or £47,000 of gross construction expenditure) per annum is required to directly support a FTE, and that £52,000 of multiplier expenditure is required to support a FTE.

- Post 2004 development through to 2010 is estimated at £1.75 million per annum, leading to a further £1.05 million per annum indirect spend. This will equate to 65 FTE's per annum.

- Visitor number predictions for the elements making up the matrix of WHS projects are based upon the opportunity to provide an integrated visitor experience, the reduced Big Pit entrance price and the marketing opportunities afforded by WHS inscription.

Estimated visitor numbers Blaenavon Industrial Landscape

Location/Year	2000 (actual)	2001	2002	2003	2004	2005-10
Big Pit – Casual Visitors	35,300	42,900	52,300	61,700	71,100	73,000
Big Pit – Educational Groups	38,400	45,700	54,800	64,000	73,200	75,000
Big Pit - Other Groups	4,300	5,000	5,700	6,500	7,300	7,500
Other Blaenavon	5,000	8,000	11,800	15,500	19,300	20,000
Total	83,000	101,500	124,600	147,700	170,900	175,500

Note: Attendance at Big Pit does not preclude attendance at other locations
Source:Blaenavon Economic Impact Study, Welsh Economy Research Unit 2001

- The output attributable to the operation of the various facilities and to the visitor expenditure is estimated to total £4.18 million. An estimated output multiplier of 1.4 gives a total direct and indirect output of £5.85 million.

- Direct and indirect employment supported through the operation of the various facilities and through visitor expenditure totals 151 FTE's. Of these, 118 will be within Blaenavon itself. The report identifies that there will be some constraints in making the most of the economic opportunities because of a relative lack of accommodation and recreation businesses.

6.39 Discussions indicate that since inscription there has been increased visitor activity and evidence of new visitor facilities opening – such as higher quality cafes in Blaenavon, and increased interest in setting up accommodation enterprises. However some of these changes are likely to be as the result of the National Galleries and Museums of Wales taking management responsibility for Big Pit (which it is understood would have happened irrespective of WHS status), and the subsequent reduced admission price. While there have been some changes, progress is described as slow. Much of the site is on moorland , with poor access, unsafe structures and a lack of interpretation.

6.40 Given the lack of access to part of the site and a relative lack of facilities for visitors there has been relatively little marketing of the area as a WHS. A group is being established to look at marketing issues such as branding and logos, although it is understood that there are few resources allocated yet for marketing. Overall it is anticipated that there will be a gradual rise in visitor numbers as a result of WHS, with tourism seen as the tool to halt the area's spiralling decline.

6.41 There has also been evidence of a rise in property prices, and this has been linked to WHS status. A Welsh Assembly funded housing repair scheme in operation in Blaenavon now includes conservation considerations. Quality of repairs has increased, and includes the use of natural roofing slate and replacement of chimneys.

6.42 The Blaenavon Economic Impact Study also covers discussion about some of the issues about exploiting industrial heritage with disadvantaged communities. It suggests that:

- Industrial heritage sites are often expensive to make suitable for visitor access (both in terms of physical suitability and interpretation requirements) and can require a high direct labour component for health and safety reasons.

- The environmental damage often associated with industrial heritage sites means that it can be difficult to attract new activities to adjacent areas, leaving economic success of redeveloped sites dependent only on the long term visitor numbers.

- Industrial heritage sites are often distant from extant tourist circuits and that decline may have reduced transport and other infrastructure.

- Tourism-led development at some industrial heritage sites can represent the only or last possible solution and some of the factors (such as the social structures and value systems) required to successfully exploit the physical industrial remains may have diminished.

- Maximising local impact will include using local suppliers wherever possible, and consideration should be given to splitting large contracts into a number of smaller ones. This can allow the use of preferred suppliers if the contract is below the tender threshold, and avoids smaller local companies from not bidding for complex large projects. Additionally, town centre regeneration should improve the visitor offer, particularly in terms of retail and catering, and should consider the improvement of extant properties as well as new development. Marketing should include the complementary role of the WHS experience with other elements of the tourism product.

6.43 Commenting upon the use of WHS status as a vehicle for regenerating Blaenavon, *Is Conservation of Industrial Heritage a Road to Local Economic Development?* (Welsh Economic Research Unit 2001) indicated that a central problem in this location is an under-developed supply side. In particular, few in the local community possess the skills or financial resources to fully contribute to a regeneration process based upon tourism.

Derwent Valley Mills

6.44 Derwent Valley Mills were inscribed as a WHS in 2001 and includes a landscape of industrial buildings, related housing and canal, road and railway architecture. The majority of the buildings are currently in use.

6.45 A survey at three of the locations within the WHS (Cromford Mill, Derwent Valley Visitor Centre and Derby Industrial Museum provides information about visitors and their trips:

- 68% were on a day trip from home, mainly from within the region. 89% of holiday visitors were from within the UK. Different interview locations had different visitor profiles.

- An interest in history/heritage was the most common motivation for the trip (32% of visitors), followed by “Something to do” (19%), “Interest in/enjoy visiting the local area” (15%), “A day out” (12%) and “Children wanted to go” (11%).

- Visits to more than one of the centres on that trip varied between 25% and 4% of visitors depending on the interview site (note that most visitors are on day rather than staying trips). Between 20% to 51% of visitors (depending on the interview location) had visited other mill sites on the WHS in the past, and up to 22% of visitors were likely to visit other mill sites on the WHS in the next 12 months.

- 43% of visitors were aware of the WHS status. 26% had found out from newspapers, 16% from general knowledge and 14% from friends and relatives. While locals were most likely to have found out about WHS status from newspapers (32%), holiday visitors were most likely to have found about through leaflets (24%) or from friends/relatives (21%).

6.46 The Derwent Valley Mills World Heritage Site Management Plan Consultation Draft (July 2000, revised May 2002) indicates that;

- WHS inscription is predicted to lead to an increase to the numbers of visitors in the area. It is anticipated that Cromford Mill will increase from 100,000 visitors to up to 150,000 visitors per year, and North Mill from a projected 8,000 in the mid term to 30,000 in the long term. However, Museum Development Plans will be formulated on the basis of relatively modest growth in visitor numbers.

- For the site to maximise economic impact, visitors must be encouraged to use shopping streets as well as key sites.

- Some parts of the WHS are constrained by a lack of the necessary visitor infrastructure and service culture to utilise the opportunities afforded by tourism.

6.47 Discussions indicate that development of visitor baselines is still in progress, and the development of a marketing plan for existing and future tourism audiences is still in progress, with no real WHS marketing yet. The WHS site runs through five Local Authority boundaries and therefore while there is some visitor information, most is not WHS specific. Transportation and access issues need to be resolved before attempts are made to increase visitor numbers, with parts of the site lacking in the necessary parking etc.

6.48 Current thinking about marketing the WHS is that it will build on the existing work being undertaken in Derbyshire, rather than attempting to work independently.

6.49 Discussions also indicate that WHS status is proving useful in cementing funding bids, and that this is partly because the WHS partnership is seen to co-ordinate the key organisations concerned with the site, irrespective of geographical or subject boundaries. It is understood that funders such as the Regional Development Agency are supportive of WHS-related projects and that the introduction of a HERS scheme is in part due to WHS status. WHS status has also raised the profile of the area's tourism product in other strategy documents.

New Lanark

6.50 While New Lanark was inscribed as a WHS in 2001, it was first nominated in 1986. Discussions indicate that much of the marketing since 1986 has capitalised on the site's status as a WHS nominee and therefore the impact of inscription itself is lessened. Nonetheless, it is believed that inscription added 10% to the site's visitor numbers, providing static levels of use while other destinations in Scotland saw use fall.

6.51 While it is believed that WHS status has had an impact on the level of use of the site, this impact is believed to be subordinate to the other factors affecting the overall volume and type of tourism in Scotland.

6.52 WHS status has ensured that there is a Local Authority WHS Management Committee, and funding for the WHS Co-ordinator. This and other funding for the site is now assured, which is in contrast to the less certain funding position prior to inscription. In comparison to tourism's role in the Cornish economy, other parts of the economy are the chief concern in Lanarkshire.

6.53 WHS status has also brought together key partners, although given New Lanark's discrete site this is less of an issue than some of the more dispersed sites.

6.54 Visitor numbers rose to approximately 30,000 in 1980 from essentially nil in 1970. Following nomination there were 150,000 paying visitors by 1990, which has now stabilised to approximately 120,000 1997-2001, plus a stable 390,000 non-paying visitors.

6.55 From two Bed and Breakfasts in the area initially, there are now around 20, plus a 38 bedroom hotel on site.

6.56 The main visitor season is April to September. In summer 60% of the visitors are from outside Scotland, and this drops to 25% from outside Scotland in the winter.

6.57 Visitors spend directly supports 140 jobs on the WHS, plus an estimated addition indirect 100 in the village in other businesses.

6.58 Discussion indicates that the marketing of the WHS centres on New Lanark's role as a historical site beside water in the countryside. The 'industrial heritage' label is not thought to be the most appropriate for the general market.

6.59 The 1993 New Lanark Heritage Village Economic Assessment indicates that:

- Economic output was over £5 million and every £1,000 increase in activity in New Lanark increases the Lanarkshire output by £1,227.
- That the trading activities of the New Lanark Conservation Trust are the key economic generators and that 52 additional jobs are sustained

Saltaire

6.60 Saltaire was inscribed in 2001 and provides an example of a Victorian industrial village. The buildings making up the site are essentially already in economic or residential use. Some of the economic use is visitor orientated.

6.61 The Saltaire Draft Management Plan 2000 indicates that:

- Considerable conservation-led regeneration took place before WHS status was achieved, recognised through a variety of accolades.
- WHS status is likely to increase the number of visitors to Saltaire, and that the site has the capacity to handle increases as long as sustainable transport is used.
- Marketing should encompass both Saltaire as an independent visitor destination as well as part of a wider range of reasons to visit the region. The Management Plan includes making linkages with other related local attractions.
- Proposals include projects improving public access to buildings, and schemes encouraging residents to offer Bed and Breakfast accommodation.
- Renewed prosperity has encouraged residents to maintain the character and appearance of their houses, and pride and economic well-being is also reflected in the investment in restoring public buildings. However, much of this predates WHS inscription.

6.62 English Heritage's *Conservation-led Regeneration* (1998) indicates that £350,000 from English Heritage and Bradford Metropolitan Council was put towards £1 million of works to the 19th century mill and model industrial village. This led directly to the regeneration of the mill and the revival of the village, creating 1,800 new jobs.

Dorset and East Devon Coast

6.63 The Strategic Report on Development Potential (2002) indicates that:

- The effective, co-ordinated management of the attractors, infrastructure and services is key in maximising economic development potential. However, on its own, the WHS offers no development potential, although it is a key component in the wider *World Heritage Coast* (WHC), which provides the services and infrastructure.
- It is viewed as critically important to develop a brand identity that integrates the WHS and the WHC. The report also makes much of the role of spatial development, with gateway towns providing dispersed nodes of tourism development.
- There is potential for developing specialist out of season breaks to combat visitor seasonality issues.

- There is a need to develop local food and drink supply to support the overall WHC brand as one of several measures to be developed.

- WHS status is likely to have value in non-tourism business development.

- The report identifies market sectors according to volume and level of engagement with WHS. The international scientific community, school groups and special interest groups are all identified as having the most interaction with the WHS, but with a low volume. The highest volume segments are general holiday makers, walkers/other outdoor activities, shoppers and day trippers, most with relatively little interaction with the WHS.

6.64 A series of workshops were held in eight of the gateway towns for the WHS. Attendees were across a variety of sectors, with the single largest group being accommodation operators.

- 43% of people felt that WHS status would be "very relevant" to them and only 3% felt that it would have no relevance. Over half felt that WHS status would bring increased opportunities for marketing (58%), off peak business (58%), overseas business (56%) and special interest breaks (51%).

- 82% of those attending wanted further workshop opportunities associated with opportunities presented by WHS status.

- The workshop identified the value of a high profile visitor centre, particularly if it represented an outpost of a national museum (in the way the Tate St Ives was part of the larger Tate network), but only if it did not infringe upon the operation of existing interpretation centres.

- The workshop also identified the need for local, national and international marketing, with WHS status being used to reinforce local and sub-regional brands, along with out of season and special interest tourism.

- The cruise ship market was seen as one possible source of new visitors.

- Opportunities were identified to link accommodation, walking, boat trips and buses with co-ordinated ticketing and timetabling.

- The Dorset part of the WHS already receives 200,000 educational visits per year.

- The site is already at capacity during the summer.

6.65 Consultation indicates that although it is difficult to establish firm estimates of increased visitor numbers at this stage, there have been significant visitor number increases at some of the sites, and that there has been an increase in out of season visits. While most of the increases have been moderate, some reported increases have been up to 33%, although it is not possible to determine what part of any increase is down to the WHS site as opposed to other motivations.

6.66 The consultation also indicates that there is recognition of the importance of branding and marketing in building the positive impacts from WHS inscription.

6.67 Current marketing activity includes a Jurassic Coast Mini Guide available in English, Dutch, German or French, available direct from the WHS team or through a variety of intermediaries. Other initiatives include the branding of a Wessex Train, the 2003 introduction of the X35 Jurassic Coast Bus service, and the development of a marketing strategy due to be in place to guide 2004 activity.

Hadrian's Wall

6.68 Hadrian's Wall was inscribed as a WHS in 1987. While the site has no real connection with industrial archaeology, the Wall runs across a substantial area, crossing many local authority boundaries.

6.69 The Hadrian's Wall World Heritage Site Management Plan 2002—2007 indicates that:

- It is estimated that 1.25 million visits are made to the WHS in a normal year, of which about 540,000 are to staffed sites. Figures have been generally static over the last decade, although there has been a slight overall downward trend over the last two or three years. Visitor numbers peaked in 1973 and have since fluctuated.

- The estimated value of tourism within the Hadrian's Wall corridor is £105.6 million for visitors staying away from home, and £29 million for day visitors from home. The 6,000 jobs supported by this expenditure make up 7% of all jobs in the Wall corridor. There are at least 580 accommodation businesses in the Wall corridor plus the attractions of the site, cafes, restaurants and other visitor facilities.

- As well as the interest in the WHS itself, the Wall and its setting accommodates other recreational activities such as walking, cycling, fishing, climbing and nature studies. The WHS includes the Hadrian's Wall Path National Trail.

- The Hadrian's Wall Tourism Partnership co-ordinates the monitoring of visitors and marketing, and has worked to develop an agreed brand, which has been tested with visitors. Marketing has been use as a visitor management tool to distribute visitors to less sensitive parts of the Wall. The partnership has also agreed a hierarchy of information and orientation points, and has promoted stronger links with local services and businesses.

- The establishment of the Hadrian's Wall Tourism Partnership has meant that national and internationally co-ordinated marketing campaigns have taken place. The marketing priorities are to target UK and international visitors which will increase the value of tourism in the area, generate shoulder season visits and spread trips across the region. Initiatives have included print, PR, exhibitions, direct mail, web site development and other marketing tools. Examples include the "Where to stay for walkers" publication.

- The Hadrian's Wall Bus Service has been developed as an alternative to the use of the private car. Through the use of special liveries, the service has also been used to promote the site.

- There are various proposals for active development of individual sites and for the whole WHS. It is believed that while many of these projects would have happened in any case, the existence of the overall strategy has inspired others and has been a major comfort to external funders (such as HLF).

- Opening of new visitor sites along Hadrian's Wall can lead to displacement from existing sites rather than simply adding to the overall level of visitors. Many visitors to the area will be motivated by the combination of varied quality attractions rather than by a single site, and visitors staying in accommodation some distance from the Wall are likely to include a visit. Conversely, visitors primarily drawn by Hadrian's Wall will seek variety by visiting other attractions in the region.

6.70 Discussions indicate that WHS inscription has had little direct impact on visitor numbers. The area already had a strong reputation in national and international markets, and there was no significant changes in visitor numbers as a result of WHS inscription. The lack of effect is likely to be also attributable to the low-key approach to inscription in 1987. Nonetheless, as competition has grown, WHS status has provided a quality endorsement for visitors and it is believed that it has helped to maintain levels of use.

6.71 Discussion also indicates that WHS has helped access funding, with a contribution to the higher profile for Hadrian's Wall as an asset in the region's economic and cultural strategies. As the economy has changed and tourism has become more important, Hadrian's Wall and other visitor facilities in the region have been seen as vital.

6.72 It is understood that a central theme of the marketing strategy has been to convert day visitors to staying visitors rather than necessarily aim to increase overall visitor numbers. Through this strategy the visitor economic contribution has been increased.

Marketing Development

Activity

6.73 A WHS Marketing and Interpretation Panel has been established to provide strategic direction and a co-ordinated approach to marketing and the way that the mining heritage is interpreted. Membership is composed of public and private sector representatives as well as NGO's (such as the Trevithick Trust and the National Trust). The group has only recently been formed and thinking is at an early stage.

- There is explicit agreement between the partners on the need to co-operate, both in marketing and establishing a coherent common interpretation approach. However, it is apparent that before any system of hub and satellite mining attractions can be established, there needs to be further work on establishing the relationships between the different mining heritage attractions. In particular, decisions on the venues to be used as the pivotal visitor centres need to be agreed within the partnership

- There is agreement within the Panel about the need to set and maintain high levels of quality. Locations within the WHS need to meet or exceed minimum quality standards in order that the visitor expectations of the WHS are not jeopardised

- The Panel has yet to address the issue of the desired number of extra visitors through exploiting the potential of WHS inscription, and the resources they can bring to realise any such ambitions. Work yet to be undertaken in this area includes consideration of the desired timescale for increased visitor numbers, and any preparation timetable (such as assembling funding bids)

- There is recognition that marketing opportunities will be best exploited by building programmes with existing initiatives. The Cornwall Association of Tourist Attractions (CATA) is identified as a potential partner, as well as the Devon Association of Tourism Attractions (DATA) and the Devon and Cornwall Overseas Marketing Consortium.

- A mobile exhibition is being considered, which may be used in a variety of venues in Cornwall and West Devon as well as further afield. Linked marketing with other high quality attractions in Cornwall and West Devon is also being considered, as well as a website, handbook and integrated leaflets and information boards. The WHS is a reflection of the wider Cornish culture and there may be links yet to be exploited. Opportunities have also been identified for linked activities with other initiatives outside the area, such as with other World Heritage Sites, and European industrial heritage and cultural initiatives

- Other issues being considered by the Panel include the integration of the interpretation of sites, the diversity of markets to be catered for, the need to share market intelligence and a need to work around the varying levels of ownership, accessibility and visitor infrastructure around the WHS sites

6.74 The work of the Marketing and Information Panel is still at an early stage and it may be necessary to build a wider engagement to maximise the WHS potential,

6.75 The Cornwall Tourist Board has a budget for new projects, currently around £50,000 per year. Typically this funding is used for initiatives such as 'Getting Married in Cornwall'. Discussions indicate that this level of funding is likely to be too small to exploit the potential afforded by WHS inscription, but that debate about the necessary budgets will be predicated by an assessment of the extra visitor numbers required. Furthermore, the assessment of extra visitors required will at least partly arise from the planned impacts from the capital projects already undertaken or planned (e.g. through the Land Reclamation programme). In essence, there is a place for marketing investment to support the substantial public expenditure on mining heritage product development.

6.76 The Dehwelans project relates to the concept of 'homecoming' for Cornish emigrants and their descendents, and is strongly linked to mining heritage. The project builds upon existing networks in Australia and the USA. In the USA the Cornish American Heritage Society meets every two years in different cities, while in Australia, Kernewek Lowender has a big commercial festival based around three towns in South Australia. Much of the basis for the international links relates to mining and the emigration of miners. The pilot Dehwelans project took place in May 2002, on a small scale and without the benefit of public funding. Around 250 visitors from overseas, plus some local visitors and some from the rest of the UK took part in the event, which was centred around Pendennis Castle. Most of the non-local visitors stayed for two weeks. 63% said that Dehwelans was the main reason for their trip, 61% were from the USA, 68% stayed in hotels and 95% said that they would return to Cornwall. It is estimated that the event put £200,000 into the Cornish economy at a time of year when there was capacity for extra visitors. The event timing also encompassed the added attractions of the Padstow Hobby Hoss, Helston Flora Day, Trevithick Day and the Du Maurier Festival. Constraints included a lack of credit card facilities for the 'Made in Cornwall' market and the lack of travel/accommodation packages. Dehwelans is planned to happen every two years.

6.77 The future for Dehwelans includes building the visitor numbers for 2004 through a £200,000 programme part funded through Objective One. The programme will include product development as well as marketing and will increase the involvement with Cornish groups, and the involvement with local SME's. Target numbers are 500 visitors from overseas in 2004, with a future target of 750. It is estimated the WHS status for Cornish Mining will further increase the attractiveness of participating in Dehwelans and could increase numbers by as much as 10%.

6.78 Cornwall Arts Marketing has commenced a new cultural marketing campaign for Cornwall. This encompasses a broad definition of culture, to include heritage, landscape, food, sport and art. The campaign pitches the notion of real culture and distinctiveness, which will include mining and engineering. It sets out to attract two target markets. The first of these markets is the 30-50 year olds seeking a contemporary experience, with aspirations towards visiting as a 'traveller' rather than a 'tourist'. The second market is slightly older (40-60), looking to escape back to 'reality' from city lives and seeking genuine experiences. The campaign target is to generate £500,000 extra business for the Cornish economy in 2003. The campaign started in November 2002 and includes direct mail, print and exhibitions.

6.79 Devon County Council is currently developing the Devon brand key values and messages. The components of this work include a communications and marketing strategy, including the development of strong motivational messages and images, and development of a new searchable tourism web portal site that will use a single Devon database of visitor information that will be backed up by a call centre Holiday Line service. Both the web portal and the call centre will have the capacity to deliver bookings as well as information. The focus of the marketing strategy is to develop new business, particularly out of season, and thus contribute to a sustainable tourism economy. Correspondingly, the marketing messages will be themed around 'rural', 'moorland', 'heritage and culture', all featured alongside the coast and County's resorts. The themes will also develop product links, particularly food and drink, events and festivals, arts and crafts, culture and heritage, access to the countryside (particularly walking and cycling) golf, youth activities and gardens. Discussions to establish a formally constituted public/private sector tourism partnership for Devon are at their early stages. There will need to be consideration about how the WHS will engage with that process.

6.80 Within West Devon there are no firm plans relating to marketing WHS status. However work is starting specific to Tavistock's heritage, which includes the Abbey as well as the industrial heritage. The work will set out what the opportunities are and how they can be exploited, and from this a marketing strategy will be developed, with activity part funded through Objective Two and the Regional Development

Agency. It is anticipated that industrial heritage marketing in West Devon will be a part of any such work in Cornwall, and that there will be some marketing programme for WHS inscription in 2005. WHS status is seen as a way of overcoming the access problems which are seen to constrain the growth of tourism in the district. Key markets are seen as older upmarket couples and families with young children, and it is considered that the accommodation stock in the district is adequate to cope with extra demand through most of the year. The Dartmoor Tourist Association will have a role to play in bringing visitors to the WHS, and will need to be formally brought into the Marketing and Interpretation process.

6.81 Overall, while marketing planning is at an early stage, the level of commitment and enthusiasm evident amongst the key partners indicates that there is a real likelihood of some kind of marketing project related to WHS status.

6.82 Discussions indicate that potential WHS visitors will be split into the minority who are specifically interested in mining heritage and a much larger group. The larger less involved market will need a broader set of reasons to visit than the specialist group, and it is felt that motivations related to high quality landscapes will be key.

6.83 The majority of marketing Cornwall and Devon is done by the private sector, not through public budgets. Therefore a key audience for the marketing strategy is not only potential visitors but all the other people who can 'sell the message on'. Marketing techniques such as press and public relations activity are particularly relevant.

6.84 As well as co-ordinating signposting links between the sites, the WHS as a whole needs to have internal co-ordination of its *historical periods* and its *message* in order to avoid duplication.

Planned Marketing of the WHS

6.85 Monitoring exercises on previous destination campaigns in Cornwall provide some indication of the sorts of impact that campaigns have.

6.86 The Inspirational Cornwall Campaign had a media spend of £1.2 million over four years. This generated 81,000 responses and 21,000 holidays (totalling 67,000 visitors). Of these, 3,200 visitors were considered genuine 'new' visits, using fairly strict criteria on what constitutes an additional visit. An average of 95 FTE jobs per year were directly supported through visitor spend, and 35 FTE jobs through linkage and multiplier effects.

6.87 The Devon and Cornwall Overseas Marketing Consortium (DACOM) 1999 to 2001 campaigns had a media cost of £1.1 million over the three years. It is estimated that this expenditure resulted in 251,000 visitors over the three years, of which between 10% and 12% were considered additional (i.e. some 27,610 visitors).

6.88 Both the Inspirational Cornwall and the DACOM campaigns used messages about the best of what the County has to offer as a motivational prompt for visitors, which included heritage in a broad sense as well as climate, scenery and activities.

6.89 The current Cornwall Tourist Board campaign 2003 to 2005 has a £1.75 million above the line expenditure over three years. This will include mining heritage elements as part of the wider set of reasons to visit the county.

6.90 The consultations indicate the potentially huge economic benefits from WHS inscription, with a strong hook to hang a marketing message on. This could extend the impact of any given marketing spend in terms of generation of new visitors.

6.91 The consultations also indicate that there are an increasing number of World Heritage sites in the UK (and internationally) and that with every successive new WHS, the impact is diluted. This is then compounded by evidence discussed above about the low awareness of WHS. There is also some concern about the relative attractiveness of industrial heritage in comparison to some other types of WHS, and how industrial heritage may need more interpretation to bring it to life and appeal to visitors.

6.92 Early discussions indicate that it is likely that the key partners, along with anticipated support from funding organisations and the private sector, would be able to assemble new campaign spend of around £500,000 over three years. Note that this is still subject to a number of steps before agreement and any kind of firm commitment is reached. It is likely that some of this sum would be new money, although it will have to be combined with the balance from re-worked existing budgets. It is apparent from consultations that any new marketing activity relating to mining heritage would need to be integrated with other marketing initiatives.

6.93 The process is at too early a stage to determine what balance of any new funds would be directed towards overseas as opposed to domestic markets, and what proportion may be directed towards local residents.

Consultations

6.94 The consultations have indicated that the prime objectives that are expected to be met via the achievement of WHS status vary considerably, from physical improvements to educational achievements and enhancements in community pride.

6.95 The future WHS inscription has already had an impact on the scale and timing of capital expenditure on mining heritage projects. As well as the recognition of the innate worth and the likely economic benefits, WHS provides a cohesion and co-ordination.

6.96 Benefits from WHS status will include rises in property prices and inward investment, as a likely result of the increased desirability of the area as a place to live and work in. It is considered that as well as the higher profile of the area through marketing of the WHS, civic pride impacts will increase investment in vernacular housing stock, contributing towards a virtuous circle.

6.97 The impact of WHS inscription will depend on co-ordination of new effort, including product development and marketing.

6.98 WHS status will provide impetus to build off-season visits dispersed around Cornwall and West Devon.

6.99 The market for 'Mining Heritage Product' includes those who are primarily seeking access to the countryside for walking, cycling and field studies.

6.100 As well as visitors staying away from home, it is anticipated that WHS status will attract additional day trips from home and educational visits.

6.101 There is a significant minority of consultees with high expectations relating to WHS status in terms of its overall impact on visitor numbers (10 to 25 or even 35%). However, the majority of consultees have relatively low expectations about what WHS status will bring (2 to 5% by 2005, 5% to 10% by 2010 is typical). However, the impact of WHS status could be limited by lack of marketing or its poor co-ordination.

6.102 There are potential links between the hard rock mining covered by the WHS bid and the other mining in Cornwall and West Devon– particularly China Clay mining. There are also potential links to other reasons to visit the area, in order to provide opportunities for the mix of activities and experiences commonly required by visitors.

6.103 Some of the specific mining heritage areas are not well placed to attract or capitalise on visitors, while others already have an existing infrastructure.

6.104 Many of those who may use mining heritage attractions or facilities may well be accommodated in the wider study area, such as Newquay or North Cornwall. The success of ventures such as the Eden Project may mean that the additional WHS uplift in visitor numbers for some areas will either be dwarfed or not able to be accommodated because of the existing visitor activity. However, other, less well-visited areas could see a substantial proportional increase in visits. In particular, it is anticipated that the towns are likely to be the main recipients of the increase visitor activity.

Discussion and Summary

Tourism Trends

6.105 The pattern of tourism to Devon and Cornwall has continued to change, with fewer main long holidays and more, shorter, additional holidays and short breaks. While the volume of staying tourism trips to the region has seen substantial increases between 1989 and 2001, there have been continued falls in the length of stay. Tourism trips continue to demonstrate a seasonal pattern, although it is apparent that the strength of the pattern has continued to diminish.

6.106 Despite the growing additional holiday and short break markets, these are now being targeted by destinations elsewhere in the UK (particularly cities) and by short haul overseas locations. The growth in low cost air travel has further fuelled demand for additional holidays abroad. However families with younger children are more likely to holiday in the UK while families with older children are more likely to go abroad.

6.107 Consumers are increasingly looking for value for time as well as value for money, and this is reflected in a desire for distinctiveness and authenticity. This is a trend that should benefit heritage destinations.

6.108 Forecasts indicate that the fastest holiday growth will be in short breaks, with no major change in longer holidays. The previous growth in the volume and value of holidays has been during a period of substantial investment in the tourism product, with Section 4 grants, Lottery and EU Objective 5b, 2 and 1 funding, and the indications are that similar high profile schemes will be needed to realise the forecasts.

Mining Heritage

6.109 Mining heritage is not the only factor that will have an influence on visitor behaviour. The Eden Project and the National Maritime Museum are both high profile attractions, and Eden has a proven ability to attract visitors to the region. Although the number of visitors to the area has continued to grow, in order to gain increased visitor use of mining heritage facilities there will have to be some combination of:

- Increased propensity to visit attractions by day and staying visitors
- Displacement of visitors from existing and any other new facilities
- Increased visitors to the region, attracted either to see mining heritage facilities or possibly drawn by other parts of the holiday product

6.110 The British public generally values heritage, and the wider environment is considered to be part of this heritage. However there is a need for heritage facilities to be commercially orientated in order to be successful, and industrial heritage attractions have the greatest chance of success if they are part of a wider range of tourist attractions.

6.111 There is a substantial amount of evidence that conservation and regeneration are mutually beneficial, with heritage regeneration projects attracting at least as good returns as other investments. Furthermore, heritage investment can lever in substantial additional funding and typically heritage led regeneration stipulates high quality standards for the work undertaken. There are export opportunities for companies with specialist conservation skills, but this is constrained by a lack of information on market opportunities.

6.112 The provision of heritage orientated visitor trails leads to tangible economic benefits for existing local businesses, although the most immediate impact was in terms of the employment supported by the construction and conservation works. However, the majority of trail users are locals rather than visitors staying away from home, and the main constraint on use was lack of marketing activity and awareness, although some very popular facilities were constrained by overcrowding. Most indications are that the use of walking and cycling trails will increase, although the rate of increase is dependent upon the marketing resources employed.

Other WHS Sites

6.113 Most other industrial heritage sites are very different from the proposed Cornwall and West Devon mining heritage WHS site because of the size and distribution of the sites. Most of the others are single well-defined sites, with development characteristics more akin to a single large visitor attraction. Compared to the other WHS sites considered as part of this study, visitor numbers to the areas and facilities making up the Cornwall and West Devon WHS site are already larger.

6.114 Discussion indicates that inscription does not necessarily produce a step change in the volume or value of visitors although this will depend on the marketing used as well as the sites existing role as a visitor destination – if the area is already well visited then proportionately the difference will be small. Many of the industrial heritage WHS sites reported low levels of awareness of WHS status and a lack of understanding about what the status might mean. Other issues include:

- Visitor patterns to industrial heritage sites are seasonal, although seasonality is reducing
- There is a relatively good cross section of visitors across the socio-economic groups
- Industrial heritage WHS sites play a part in formal education from school age to higher education
- Specific benefits included cross authority strategies, which were often of use in attracting funding
- There is some evidence of increases in property prices linked to WHS status, and higher standards for property renovation
- Commercial exploitation of the opportunities from visitor activity may be constrained by a lack of entrepreneurship in deprived communities, leading to an under-developed supply side
- Most visitor businesses felt that WHS status would bring benefits

- Development of new visitor sites in a WHS would often displace visits from other sites in the same area

6.115 Markets can be split between the low volume scientific community, school groups and special interest groups on the one hand, and the higher volume general visitor market on the other. The 'Industrial Heritage' label is not necessarily the most appropriate for the wider visitor market.

Cornwall and West Devon WHS Marketing

6.116 There are already a number of marketing initiatives setting out to attract new visitors to the study area, and to ensure existing visitors continue to re-visit. Some of these initiatives, such as Dehwelans, have illustrated the potentially substantial rewards from using the overseas links stemming from the migration of miners from the study area.

6.117 The process of moving towards WHS status for Cornwall and West Devon has built further partnership approaches to cross authority and organisation co-operation, and to destination marketing. Much of this is led through the Marketing and Interpretation Panel.

6.118 Issues still to be resolved at the time of writing include:

- Setting formal goals for the wider impacts of WHS inscription
- Establishing budgets and plans to realise goals
- Establishing the details of the relationship between the different facilities making up the proposed WHS

6.119 Previous domestic campaigns of about £1.2 million have generated about 70,000 visitors over three years, and overseas campaigns of £1.2 million have generated 251,000 visitors over three years.

6.120 There are early indications that there might be new campaign spend of up to £500,000 to market the mining heritage WHS. If this follows the pattern established by the campaigns noted above then there will be some 70,000 staying visits generated, of which about 7,000 will be genuinely new visits.

6.121 There are arguments that WHS status, backed up by the quality of the visitor offer, will increase the value of any new spend in generating visitors. This might, for instance, be through increased effectiveness of PR campaigns, thereby generating interest from target markets There are also arguments about the competition faced by the Cornwall and West Devon WHS from other destinations.

6.122 It is apparent that any new marketing spend relating to the WHS will be integrated with other destination marketing activity in Cornwall, West Devon and the South West..

7 FUTURE ECONOMIC IMPACT

Introduction

7.1 This section reviews the evidence from the previous sections and builds an assessment of the likely future economic impact. Within this assessment it is considered that the impact is strongly dependent on the marketing effort used to exploit the WHS status.

7.2 The section has an assessment of findings followed by a set of estimates of the impact of WHS status.

Assessment of Findings

7.3 The previous sections have reviewed a substantial amount of evidence from a variety of sources, including other UK industrial heritage World Heritage Sites. This evidence indicates that:

- There are significant expectations of the impact of WHS status from tourism and other development professionals within Cornwall and West Devon, with the majority of predictions through the consultations of a growth of between 2% to 5% growth to 2005 and 5% to 10% by 2010. These predictions are typically made on the foundation of professional experience in tourism and economic development

- Evidence from other WHS sites demonstrate a positive effect from WHS status, although this varies considerably from site to site. However, where indications on the impact were available, these range from predicted increases of around 50% in 5-10 years (but from a small base), a reported increase of 10% on inscription (again from a relatively small base) through to no real impact or only small increases over time (particularly from the larger sites). While the situations of the other sites are very diverse, there is a pattern of some of the largest annual percentage increases being for sites with relatively small visitor numbers to start with. Those sites with an established visitor profile saw a smaller proportional impact. Cornwall and West Devon are established visitor destinations and therefore would expect to see a smaller proportional increase. The other WHS sites do also provide indications that the largest gains are as a result of the most marketing and product development effort. Consideration of the information from the different sites and their circumstances forms the view that the process of inscription will have a small but significant short term effect and that there is the potential for steady growth in the longer term. This view supports the predicted 2%-5% growth to 2005 and 5% to 10% by 2010

- The overall number of trips to the study area is forecast to increase whether or not WHS inscription is achieved, with the majority of the increases being shorter trips. The pattern of seasonality to the region has been changing, and it seems that the changing pattern of visits (i.e. more additional holidays) will continue this trend. Consultations indicate that the type of visitor motivated to visit because of WHS status is more likely to have a flatter seasonal pattern than the main holiday market, and some of the evidence from other WHS destinations confirms this. Consideration of the evidence suggests that WHS status will add weight to the more even spread of visits across the year, but that the outdoor nature of some of the elements (particularly the trails) will still be relatively seasonal

- The South West Tourism target forecasts note that previous growth is based upon substantial product and marketing investment, and that for these forecasts to be realised, there will have to be continued investment. The visitor activity benefits from the WHS will be part of the tourism development activity necessary to realise the target forecasts.

- While there is optimism about the impact of WHS inscription on visitor numbers, there is recognition that this will require positive co-ordinated action to exploit the opportunities. The main issues relate to the relationship between the different elements of the WHS (which could result in displacement effects) and establishing targets and budgets for any marketing activity

- There is a recognition that the WHS 'offer' to visitors will be in the context of the rest of what Cornwall and West Devon have for visitors. Linked to this, some of the motivations for using WHS facilities will relate to visitors pursuing non-mining heritage experiences, such as access to the countryside

- Evidence from the Cornwall and West Devon WHS Bid and from other WHS destinations shows an increased amount of partnership working. This partnership working elsewhere has led to more effective use of available resources and an enhanced ability to source funding. It is likely that this effect will also be apparent in Cornwall and West Devon

- Discussions to date indicate that a campaign totalling £0.5 million over three years could be assembled by some of the key partners in addition to other ongoing or separate new initiatives. While a substantial investment, in comparison to the impact of previous campaigns this will not by itself provide the marketing effort required to deliver the target visitor figures to Cornwall and West Devon. Previous campaigns give a spend of £7.17 to generate a visit (with expenditure of £2.3 million generating 321,000 visits), and if this type of ratio is relevant here, then the £0.5 million will generate just under 70,000 visits. The previous campaign experience noted that around 10% of the visits generated were additional visits over and above that which may happen anyway. It is possible, however, that the interest in the WHS will generate travel writer interest, in effect extending any campaign, and that the better partnership working already noted will have a positive impact on marketing campaigns

- The evidence shows that investment in facilities (whether public or private) will build at least a local impact

Visits to Mining Heritage Attractions and Facilities

7.4 Consideration of the evidence collected on likely visitor impact suggests that there will be particular positive impact in terms of the use of mining heritage attractions. Partnership working and the likely extra marketing resources will raise the profile both within Cornwall and elsewhere. The pattern of visits to attractions will typically see the effects of new developments quickly, with visitor usage then tailing off. The gradient of the decline will depend on the extent of continued development.

7.5 The proposed mining heritage projects are likely to have a significant local impact on visitor numbers. The developments at Morwellham and linked public product could provide a step change in visits to West Devon, boosted by any potential projects exploiting Tavistock's mining heritage. Likewise, the proposed developments at Geevor could see visitor numbers continue to rise and the potential future project at Robinson's shaft could have a significant impact on visitors to Camborne/Pool/Redruth. The range of mining remains consolidation projects, and their associated access and interpretation work will all provide visitor benefits, although the current understanding is that these will provide incremental rather than step change impacts

7.6 There is also the issue of displacement. Some of the planned attraction and other visitor facility development is likely to gain visitor usage at the expense of existing provision. The consultation process has indicated that consultees are aware of the danger of displacement. The problem extends into the relationship between mining heritage facilities and other leisure facilities as well as between mining heritage facilities

7.7 The extent of displacement will also depend on whether visitors are drawn from other types of facility or from mining heritage attractions. This will be dependent on the extent of the investment by other types of visitor facility. It will also depend on whether the forecast increase in the overall number of visitors to the region materialises, thereby bringing a bigger pool of potential visitors

Estimates of Impact of WHS inscription

Visits to Cornwall and West Devon

7.8 In considering the likely impact of inscription on the overall visits to Cornwall and West Devon the key impacts are:

- That there will be a marketing campaign of around £500,000 media spend over three years backed up by appropriate PR work, aimed at generating new visits by staying visitors and day visitors. This is in addition to the tourism capital projects, infrastructure projects and other product and people investment required to deliver the experience to visitors once in the area

- The evidence from other WHS sites and tourism and economic development professionals that there will be positive effects of up to 10% increase in visitor numbers to Cornwall and West Devon. This will include the impacts of extra visits to mining heritage attractions and facilities as well as others motivated to visit because of the increased attractiveness of the area through its WHS status

- That there will be a flatter seasonal pattern of visiting by people motivated by the WHS status

- That established destination areas will see proportionately less benefit than those places with a less developed tourism profile

7.9 In addition, the situation will be blurred by the impact of other landmark developments, changing trends in the pattern of tourism and a host of other possibilities outside the influence of the agencies concerned with WHS status (such as terrorism, economies, exchange rates etc.).

7.10 Furthermore, it is apparent that overall the impact of WHS inscription will be to build a less seasonal pattern of visits, although this will be more apparent amongst some visitor types (e.g. older couples) than others (e.g. families with school age children).

7.11 Balancing these considerations it is predicted that there will be an increase in the number of visits to Cornwall and West Devon as a result of WHS inscription. Consideration of the available evidence above from the consultations, studies and other WHS destinations forms that view that the number of visits to Cornwall and West Devon related to mining heritage will increase by 10%. Additionally, this increase will begin to commence in 2004 (assuming that the WHS marketing campaign begins then) and peak some three years after inscription.

7.12 Earlier sections of this report discuss how the evidence from the pilot survey work can be used to estimate what proportion of the total staying and day visitor expenditure is related to mining heritage. This exercise can be applied to visitor numbers in order to make use of the predicted changes in visitor numbers arrived at through the case study and consultation exercise. When estimating the expenditure related to mining heritage earlier on in the study, all of the expenditure was included from the 6% who considered mining heritage important in planning their trip, along with half of the expenditure from the 14% who considered mining heritage quite important.

7.13 Overall there are 3,644,000 staying visitors spending 20,215,000 nights in the study area, plus 9,452,000 day visits from home. 6% of visitors considering mining heritage very important will total 219,000 staying visitors and their 1,213,000 nights, plus 567,000 day visits. In addition, 14% considering mining heritage quite important will total 520,000 staying visitors and their 2,880,000 nights, plus 1,346,000 day visits. This gives a total of 739,000 staying visitors; 4,093,000 nights; and 1,913,000 day visits by people for whom mining heritage is important or very important.

7.14 It is not considered realistic to assume any significant WHS related increase amongst the wider visitor population at this juncture. Note that this forecast may have to be revised if further primary research is able to further explore general attitudes to Cornwall and West Devon Mining Heritage.

7.15 The forecast target 40% regional increase in visitors will include WHS status for mining heritage in Cornwall and West Devon. Therefore the 10% forecast increase in visits related to mining heritage will be part of the larger regional forecast increases.

7.16 There are currently 3,644,000 staying trips to Cornwall and West Devon, and 9,452,000 day trips from home. It is forecast that by 2010 there will be 813,000 staying trips and 2,104,000 trips from home related to mining heritage. The table below shows how the 10% increase is expected to be built up over the period, with the expected peak in 2007.

Year	Staying Trips Base	Additional WHS Staying Trips	Total Staying Trips	Day Trips Base	Additional WHS Day Trips	Total Day Trips
2000	739,000	0	739,000	1,913,000	0	1,913,000
2001	739,000	0	739,000	1,913,000	0	1,913,000
2002	739,000	0	739,000	1,913,000	0	1,913,000
2003	739,000	7,390	746,390	1,913,000	19,130	1,932,130
2004	739,000	18,475	757,475	1,913,000	47,825	1,960,825
2005	739,000	36,950	775,950	1,913,000	95,650	2,008,650
2006	739,000	59,120	798,120	1,913,000	153,040	2,066,040
2007	739,000	73,900	812,900	1,913,000	191,300	2,104,300
2008	739,000	73,900	812,900	1,913,000	191,300	2,104,300
2009	739,000	59,120	798,120	1,913,000	153,040	2,066,040
2010	739,000	59,120	798,120	1,913,000	153,040	2,066,040

7.17 This estimates suggests that from a base of 793,000 mining heritage related staying visits to Cornwall and West Devon in 2000, there will be growth peaking to around 812,900 in 2007, and then falling back to around 798,120 in 2010. In the same way, from a base of 1,913,000 mining heritage related day visits to Cornwall and West Devon in 2000, there will be growth peaking to around 2,104,300 mining heritage day visits in 2007 (i.e. a 10% increase), and then falling back to around 2,066,040 in 2010 (i.e. 8% increase over 2000 baseline). These changes will be due to WHS inscription, and will play a part in fulfilling the overall regional tourism growth forecasts.

7.18 Currently, the seasonal pattern of visits to the region sees 36% of the total annual volume of UK resident visits and 40% of overseas visits in July, August and September. The anticipated extra staying visits related to mining heritage (about 74,000 in 2007-2008) will have a less seasonal pattern than main long holiday trips. However, compared to the overall 3,644,000 staying trips to the study area, any difference in mining heritage seasonal patterns will be obscured.

7.19 Using the relationships discussed earlier in the report, it is possible to estimate the value of the day and staying trips. The value of mining heritage related trips at constant prices will increase to £105.2 million by staying visitors and £19 million by day visitors, giving a total of £124.2 million. Note the expenditure estimates include all the spend from those considering mining heritage very important in planning their trip and part of the expenditure from those considering mining heritage quite important.

Visitors/Year	2000	2005	2010
Staying Visitor Trips	739,000	775,950	798,120
Value of staying visitors	£101,177,475	£102,317,864	£105,241,231
Day Visitor Trips	1,913,000	2,008,650	2,066,040
Value of day visitors	£17,558,231	£18,436,143	£18,962,890
Total Spend	**£118,735,706**	**£120,754,006**	**£124,204,121**

7.20 This spend will support increase employment. Using the relationships in the *Economic Impact of Tourism in Cornwall 1998* and the *Economic Impact of Tourism in West Devon 1996* it is estimated that the FTE employment supported by mining heritage related trips will rise from 2,672 in 2000 to 2,716 in 2005 and 2,794 in 2010.

FTE's directly supported/Year	**2000**	**2005**	**2010**
Shops	235	239	246
Restaurants and pubs	856	875	900
Attractions and Entertainment	229	234	240
Garages and Transport	175	178	183
Accommodation	1,177	1,190	1,224
Total	**2,672**	**2,716**	**2,794**

Visits to Mining Heritage Attractions and Facilities

7.21 Visits to mining heritage attractions and facilities form a picture of mining heritage on the ground.

7.22 Consideration of the evidence (from consultations, other studies and other WHS destinations) forms the view that there will be an increase of around 10% in the numbers of visits to mining heritage attractions and facilities. It is believed that this will be most apparent during the period just after inscription (say 2005 to 2007), with some of this initial gain at the cost of other attractions in Cornwall and West Devon. It is then believed that some of this gain will diminish, and that the scale of this secondary change will depend on the investment by the facilities themselves and also the resources used to build mining heritage and general leisure visits to the area.

7.23 It is believed that the benefit of the increase will not necessarily be distributed evenly around the mining heritage attractions and facilities. Instead it is most likely that some attractions – particularly those used as gateways – will have a disproportionate share.

7.24 Visitors will be attracted both to new development at existing mining heritage attractions and facilities and (potentially) to entirely new facilities. What is not known is how many of the proposed projects will come to fruition, and importantly, whether existing facilities will maintain their visitor numbers. On balance, it is likely that the interest in mining heritage will create a climate suitable for new investment in facilities. If new investment in product development proceeds, this could add another 8% to 10% to visitor numbers on top of the 10% increase discussed above. This may be more evenly spread than the effect due to the actual process of inscription, because the new investment will come on stream at different times.

7.25 Earlier chapters indicate that there are 809,787 visits to the mining attractions and facilities. Using this base it is possible to work some of the predictions above into forecast figures.

Year	Base visitor numbers	Impact of Capital Investment	Impact of WHS Inscription	Total
2000	809,787	0	0	809,787
2001	809,787	48,152	0	857,939
2002	809,787	51,015	0	860,802
2003	809,787	54,048	0	863,835
2004	809,787	57,262	40,489	907,538
2005	809,787	60,667	80,979	951,433
2006	809,787	64,274	80,979	955,040
2007	809,787	68,096	80,979	958,862
2008	809,787	72,145	64,783	946,715
2009	809,787	76,435	56,685	942,907
2010	809,787	80,980	56,685	947,452

7.26 This estimates suggests that from a base of 809,787 visits to mining heritage attractions and facilities in 2000, there will be growth peaking to around 959,000 in 2007, and then falling back to around 947,000 in 2010.

7.27 Note that the estimates are based upon the overall levels of use of the mining heritage attractions and facilities. As discussed earlier in the report, some of this use may be motivated by other factors, such as access to the countryside etc.

7.28 These estimates of growth are considered to form part of the growth in visits to the wider Cornwall and West Devon study area discussed below.

Assessment of Future Mining Heritage Conservation Impacts

7.29 There are 33 future mining heritage projects identified in Cornwall and West Devon, listed in the appendix to this report. These projects range from well-developed bids through to early ideas which could be subject to substantial modification. There is evidence available for some of the future projects on the likely employment impacts during the construction phase of the project, while other projects have much less information, and estimates have had to be made using the likely cost of the project..

7.30 For those projects without evidence available, estimates of FTE jobs have been made by estimating the labour cost content of the project (using the methodology established in the *Economic Impact of the Overall Mineral Tramways Strategy*, Groundwork Kerrier 1996, described in more detail in the Mining Heritage Conservation sub-section of the Baseline) and combining this with the average wage for the construction industry in the region (£16,214.64 p.a., New Earnings Survey 2000).

7.31 The identified projects have an estimated cost of £59.4 million. It is estimated that this expenditure will support 1,710 FTE job years, derived through a combination of project estimates and labour-cost content estimation. Across the projects considered, this gives an average expenditure of £32,133 per FTE job year for the projects, which is less than the estimated £37,000 per FTE job year for the completed projects discussed earlier in this report. It may be that the estimates for the proposed projects are optimistic although the overall figure will combine a range of projects, all with different labour cost content. It is recommended that further monitoring of temporary employment supported through mining heritage conservation/construction projects is undertaken.

7.32 It is likely that these projects will span a considerable period of time, although given the difficulty in gauging the likely start date for even some of the firm proposals, it has not been possible to assemble a robust timeline for the employment impacts.

7.33 Some of the future projects still at an early stage have a substantial individual predicted construction employment estimate. However, some of the projects with large forecast construction employment are at an early stage of planning and may be realised in a different manner or possibly not at all. Even if the projects do go ahead as planned it will be many years before some of them are put into operation.

7.34 For the purposes of the study it has been assumed that the estimates of future jobs will be relatively evenly distributed across the period from the time of writing to 2010. If the estimated 1,710 jobs are spread over the eight year period, then this will be an average of 214 construction FTE jobs per year supported by mining heritage conservation. In essence, the likely succession of mining heritage conservation projects will go some way towards providing continuous employment for at least some of the FTE jobs.

7.35 This estimate is substantially higher than the current estimates for employment supported by mining heritage conservation (currently 119.6 FTE's, with an average of 96 FTE's over the period 1996-2004).

7.36 In terms of the time periods covered by the study, the estimates of employment directly supported by mining heritage conservation projects are:

Year	FTE Employment Supported by Mining Heritage Conservation
2000	119.6
2005	214
2010	214

7.37 The extent to which these estimates will be realised is dependent upon a range of factors and these estimates should be used with caution.

Assessment of Other Future Impacts

7.38 As well as any activity amongst potential visitors from outside the study area, WHS awareness can also change the behaviour of local residents. Benefits can include building a sense of civic pride, which in turn can have an impact on the amount of expenditure on property maintenance, and the style in which renovation projects are undertaken (e.g. used of premium traditional materials). Facilities forming part of the WHS may also generate new day visits and associated expenditure, although there is a chance of another activity being displaced. Once again however, any such benefits will be more secure or larger if there is effective marketing activity.

7.39 In addition to the capacity building evident in the mining heritage conservation sector, the process of putting together the WHS bid has also brought together skills.

Assessment of Economic Impact

7.40 The evidence reviewed as part of this study provides the information required to estimate the indirect employment effects of the FTE employment supported through mining heritage visitor activity in Cornwall and West Devon, and through temporary conservation/construction expenditure on mining heritage projects

Employment Supported through Mining Heritage Visitor Activity

7.41 The *Economic Impact of Tourism in Cornwall 1998* and the *Economic Impact of Tourism in West Devon 1996* indicates that the FTE employment multiplier co-efficients are as follows:

Multiplier employment	**Multiplier Co-efficient**
Shops	37%
Restaurants and pubs	44%
Attractions and Entertainment	39%
Garages and Transport	22%
Accommodation	54%

Source: Economic Impact of Tourism in Cornwall 1998, Economic Impact of Tourism in West Devon 1996

7.42 These co-efficients represent the proportion of the directly supported FTE employment estimated to be supported through linkage and multiplier effects (see the *Methodology* section earlier in this report).

7.43 Using the co-efficients above, the direct, indirect and total FTE jobs supported through mining heritage tourism activity in Cornwall and West Devon are estimated as follows:

Visitor Activity FTE's indirectly supported/Year	**2000**	**2005**	**2010**
Direct	2,672	2,716	2,794
Indirect	1,226	1,246	1,281
Total	3,898	3,962	4,075

7.44 Direct and indirect employment supported by visitor expenditure is predicted to rise from 3,898 in 2000 to 4,075 in 2010.

7.45 The combination of different spend levels in different sectors of the Cornwall and West Devon Economy indicates a FTE employment multiplier of 46%; i.e. for every one FTE supported by visitor expenditure, 46% of another FTE will be supported.

Employment Supported through Mining Heritage Conservation Projects

7.46 The *Economic Impact of the Overall Mineral Tramways Strategy*, Groundwork Kerrier 1996 utilised a local multiplier co-efficient from the Henley Centre for Forecasting for construction work of 54%.

7.47 Using this co-efficient with the estimates of FTE employment supported through mining heritage conservation projects provides estimates of indirectly supported FTE employment.

Mining Heritage Conservation FTE's indirectly supported/Year	2000	2005	2010
Direct	120	214	214
Indirect	65	116	116
Total	185	330	330

7.48 Direct and indirect employment supported by mining heritage conservation is predicted to rise from 185 in 2000 to 330 in 2010.

Employment Safeguarded and Created

7.49 It is possible to express the employment estimates detailed above in terms of whether the WHS project is safeguarding existing jobs or creating new ones.

7.50 It is clear that there is already established visitor interest in mining heritage and that this is based around the access and interpretation of sites in the study area. Given the conservation basis of the WHS project, it can be inferred that through ensuring that this conservation and access to the sites is protected, the current level of employment is safeguarded. This amounts to 2,672 FTE jobs directly supported by visitor expenditure and 120 FTE jobs directly supported through mining heritage conservation.

7.51 Including multiplier effects brings the jobs safeguarded to 3,898 through visitor expenditure and 185 through mining heritage conservation expenditure – a total of 4,083 FTE jobs safeguarded.

7.52 The forecast changes in visitor expenditure and in mining heritage conservation expenditure will generate new employment. The extra employment over and above the jobs safeguarded discussed above will be 44 FTE jobs directly created by changed levels of visitor activity by 2005 and 94 FTE jobs directly created through changed mining heritage conservation activity by 2005 – a total of 138 FTE jobs directly created.

7.53 By 2010 the direct FTE jobs directly created over and above the 2000 baseline by changed levels of visitor activity will total 122. The mining heritage conservation direct FTE jobs directly created over and above the 2000 baseline will total 94, giving a combined total of 214 FTE jobs directly created.

7.54 Both the employment safeguarded and the employment created will generate multiplier effects. Including these multiplier effects, total employment relating to visitor activity will be 3,898 FTE jobs safeguarded over the whole 2000 – 2010 period, plus 64 FTE jobs created by 2005 and 177 FTE jobs created by 2010.

7.55 In the same way, total employment relating to mining heritage conservation activity will be 185 FTE jobs safeguarded over the whole 2000 – 2010 period, plus 145 FTE jobs created by 2005-2010.

7.56 In total, 4,083 jobs are safeguarded and 209 jobs are created by 2005 and 322 FTE jobs created by 2010.

Summary

Mining Heritage Visitor Activity

7.57 Regional tourism forecasts (South West Tourism) suggest a target 40% increase in the overall number of visitors between 1999 to 2010, irrespective of type of visitor or motivation.

7.58 Through consideration of the evidence it is apparent that product development and particularly marketing (to raise awareness and motivate new visits) is key in determining the scale of the impact of the Mining Heritage WHS.

7.59 The evidence and the understanding of the product development and marketing plans suggests that there will be a peak increase of 10% in the number of mining heritage related visits to Cornwall and West Devon. This peak is expected in 2007 (following a three year marketing campaign) and will then settle to a likely 8% over the current total by 2010.

7.60 In numerical terms the current estimates are that there are 478,275 staying visits and 1,240,575 day visits to Cornwall and West Devon related to mining heritage.

7.61 By 2005 the mining heritage related trips will rise to 502,189 staying visits and 1,302,604 day visits, and by 2010 it is expected to total 516,537 staying visits and 1,339821 day visits. These increases resulting from Mining Heritage WHS status will be part of the wider tourism development needed to realise the overall regional tourism targets.

7.62 It is estimated that the FTE employment directly supported through tourism activity is 2,672 FTE jobs in 2000, rising to 2,716 in 2005 and 2,794 in 2010.

7.63 A part of the overall visitor use of mining heritage in Cornwall and West Devon will be the use of related attractions and facilities. Overall numbers at the identified mining heritage facilities are forecast to grow from a base of 809,787 in 2000 to 951,433 at WHS inscription in 2005, and to 947,452 in 2010.

Mining Heritage Conservation Activity

7.64 A total of 33 future mining heritage projects have been identified in Cornwall and West Devon, with a total estimated spend of £59.4 million.

7.65 It is likely that these projects will directly support an average of temporary 214 FTE jobs per year.

7.66 Overall it is estimated that at the 2000 baseline, mining heritage visitor and conservation activity directly and indirectly supported 185 FTE jobs. This rises to 330 in 2005, continued through to 2010.

Overall Employment

7.67 Combining the direct and indirectly supported FTE employment sees mining heritage supporting 4,083 FTE jobs in 2000, 4,292 FTE jobs at WHS inscription in 2005 and 4,405 FTE jobs in 2010.

Activity	**2000**	**2005**	**2010**
Mining Heritage Related Tourism	3,898	3,962	4,075
Mining Heritage Conservation	185	330	330
Total	4,083	4,292	4,405

7.68 4,083 jobs are safeguarded and 209 jobs are created by 2005 and 322 FTE jobs created by 2010.

8 MEASURING AND MONITORING ECONOMIC IMPACT FRAMEWORK

Introduction

8.1 This section of the report assembles a methodology for assessing WHS related projects. It is anticipated that once WHS inscription is in place there will be a Management Team, and this methodology will be for use by that team. It will also help promoters of individual projects and those developing the marketing strategy for WHS in focussing attention on those issues which are most important in securing impacts from WHS inscription and related project spend. It will also assist funding bodies to assess the value of projects.

8.2 The methodology builds upon the earlier sections of this report. In particular, it highlights monitoring indicators identified through the consultation process and the review of funding organisation priorities

Project Indicators and Outputs.

8.3 A number of consultees were asked what they considered would make indicators of successful progress under a World Heritage Site banner. The following table compares the suggestions with the target outputs for the main funders.

Indicator	**Comments Received during Consultations**	**Objective One**	**Objective Two**	**Heritage Lottery Fund**	**South West RDA**
Visitor numbers	A very common suggestion. However, the majority of consultees suggest that in fact visitor numbers is a less important indicator than visitor spend or annual distribution of visitors. Electronic counters at non-paying sites were recommended.				✓
Average visitor spend	There is a widely identified need to attract high-spending visitors, and a belief that 'intellectual'-based activities such as heritage will assist in this aim.	✓5.1 ✓5.2	✓3.1 ✓3.2 ✓3.4		
Turnover of businesses relying on mining heritage related activities	As both an indicator of visitor spend and an indicator of business growth potential. A number of consultees suggested providing an index of turnover and other statistics, drawn from a range of businesses that would be happy to provide data.	✓5.1 ✓5.2	✓3.1 ✓3.2 ✓3.4		
Annual distribution of visitors	As an indicator of the increased viability of tourism-related businesses. However, it was also noted that there is a limit to the number of visitors that can be accommodated.				
Visitor overnight stays	Increasing visitor spend is strongly connected to ensuring that visitors stay overnight. Some commented that as well as aiming to get more day visitors to stay one night, there should be a target for increased number of 2 and 3-night stays.				
Levels of financial investment in public product	Public spend, and leveraged private spend, as an indicator of commitment to the resource. However, it was noted that such investment is essentially short-term spend rather than sustainable economic development.				✓ - levered private finance
Speed of application process	As an indicator of the overall quality of the Bid.				

Indicator	Comments	Objective One	Objective Two	Heritage Lottery Fund	South West RDA
Awareness raised locally about WHS status	Particularly as a measure of local pride and therefore confidence in the local economy.			Relevant	
Awareness internationally	As a result of the need to measure the reach into target populations abroad.				
School-level learning outputs, e.g. number of units or courses undertaken	As a measure of the need to tie heritage into knowledge-based capital. It would be important to ensure that any educational outputs were related to the curriculum and indeed to the future generally.			Relevant	
Number of buildings at risk	As an indicator of the condition of the resource itself.			Relevant	
Number of buildings involved in WHS-related conservation projects	Ditto	✓5.2	✓3.1 ✓3.2	Relevant	
Adaptive re-use of buildings	Not just for tourism use – there is an understanding from the WH community that buildings should remain part of the economic life of the locality	✓5.2	✓3.1 ✓3.2	Relevant	
Rental prices of restored buildings					
Brownfield sites regenerated			✓3.1 ✓3.2		✓
Direct, indirect and induced FTE jobs created		✓5.1 ✓5.2	✓3.1 ✓3.2 ✓3.4		✓

Indicator	Comments	Objective One	Objective Two	Heritage Lottery Fund	South West RDA
Existing direct, indirect and induced FTE jobs safeguarded		✓5.1 ✓5.2	✓3.1 ✓3.2 ✓3.4		✓
Number of accommodation providers advertising themselves as being within or close to a WHS.			✓3.1	Relevant	
Tour guides advertising WHS-related tours	As a measure of the degree to which the marketing and use of the WHS areas is co-ordinated. This is a prime concern for many.				
Increased use of joint marketing efforts	Again, co-ordination of effort is regarded as a key requirement for success.	✓5.1	✓3.1 ✓3.4	Relevant	
Number of businesses exporting conservation skills abroad.					
Improving attractions	There was a very widely perceived need to raise the quality of the visitor experience at a number of key sites and attractions.		✓3.2	Relevant	

8.4 In terms of the Objective One Programme, discussions with Government Office for the South West indicate that elements of the work under the World Heritage Site mainly fall under Measures 5.1 (To develop and promote Cornwall and Scilly based on its distinctiveness and encourage the growth of arts, culture and heritage activity thus securing economic advantage for the region) and Measure 5.2 (To maintain and increase the economic benefits derived from the coastal and inland heritage, the buildings and structures of historic value and the natural environment with emphasis on access for visitor and resident alike). However, discussions also indicated that some activities may also fall within the following measures:

- Measure 1.2 – To facilitate company growth and expansion through the provision of appropriate financial support
- Measure 2.4 – To remove infrastructure barriers that act a a constraint to the realisation of the full beneficial impact of projects and plans
- Measure 4.8 – To regenerate rural, coastal and island communities affected by long-term decline of primary key sectors through increased local services and community facilities

8.5 In addition to the above, The South West RDA, and the Objective One and Objective Two Programmes, have additional measure-level target outputs that projects should seek to achieve. These are as follows:

Target	**Objective One**	**Objective Two**	**South West RDA**
Centres enhanced/ establishing centres of excellence	✓5.1	✓3.1 ✓3.2	
Assisting SMEs	✓5.1	✓3.1	
Business start-ups			✓
Ports improved	✓5.2		
Environmental improvements		✓3.1 ✓3.2	✓
Footpath and cycleway improvements		✓3.1 ✓3.2	✓
Projects contributing to improved air quality		✓3.1 ✓3.2	
Projects using recycled materials		✓3.1 ✓3.2	
Projects contributing to the energy efficiency of economic activity		✓3.1 ✓3.2	
Businesses marketing environmental aspects of their activities		✓3.4	

8.6 All funding regimes have other key criteria for projects to fulfil. These overarching requirements are summarised in the table below.

Fund	Requirement	Notes
Heritage Lottery Fund	All HLF funded projects must increase opportunities for learning about heritage and open up heritage resources and sites to the widest possible audiences. Projects must also satisfy one of two other criteria: broad and integrated community involvement; and the environmentally sustainable conservation and enhancement of heritage.	
Local Heritage Initiative	Targeted at enabling local groups engage in interpretation and conservation work. Can grant between £3,000 and £25,000.	In 2001, the Local Heritage Initiative funded 'Trevithick Day' in Camborne, the Luxulyan Valley Local Heritage Project, and the restoration of a lime kiln in Bampton, Devon.
Landscape Partnerships	Aimed at partnerships representing a range of heritage and community interests. Will support efforts to tackle the needs of landscapes. Areas must have a strong landscape identity, recognised by the communities which live, work and visit there. Must include aspects of built and natural heritage. Envisaged as an integral part of rural regeneration.	Available in early 2003 - the HLF hope to support around ten projects a year via Landscape Partnerships.
Your Heritage	For projects between £5,000 and £50,000.	
Heritage Grants	For projects of £50,000 or more	Project Planning Grants are also available to meet early planning costs of projects that may then lead to a Heritage Grant application. These can be between £5,000 and £50,000, and can be used to produce access and management plans, and employ a project officer.

Fund	Requirement	Notes
Objective One		
Measure 5.1 – Securing the benefits from the arts, cultural and heritage industries	The objective of this measure is to encourage the growth in arts, cultural and heritage activity. This can include: strategy development; branding; promotion and marketing; and specialist R&D facilities and services. The measure criteria are: • The provision of substantive support, clearly able to generate significant benefits for the SME • The extent to which support is directly channelled to the SME • The contribution from the private sector • The inclusion of on-going client management support.	Capital and revenue
Measure 5.2 – Enhancing and developing the public product	This measure is about increasing the economic benefits derived from heritage, (including the natural environment). It can involve: land reclamation; restoration and consolidation of historic buildings, structures and sites; feasibility and technical studies; enhancing interpretation and access facilities associated with the historic environment; enhancement ,refurbishment and re-use of vernacular buildings including mine buildings, for business use including tourism. The measure criteria are: • The extent to which the project involves infrastructure/facilities closely linked to the distinctive assets of Cornwall • The degree of market failure • The potential number of visitors • Linkages to revenue support activities.	Capital Note – there is considerable competition for funds under this measure, which is heavily subscribed.
Cross cutting theme – Environmental Sustainability	The theme aims to ensure the environment makes a positive contribution to the aims of the programme	The conservation of mining heritage has involved the remediation of derelict land and economic reuse of brownfield sites
Cross cutting theme – Information Society	The theme aims to increase the use of electronic information by all groups	Though establishing web-based information about mining heritage, the WHS project is contributing to this theme

Fund	Requirement	Notes
Objective Two		
Measure 3.1 - Regenerating the rural economy	This measure is about helping rural economies respond to the decline in traditional sectors by developing co-ordinated action to support sustainable alternatives. This includes: feasibility studies; actions to develop crafts/heritage; environmental improvements to specific sites where linked to an economic regeneration plan. Projects under 3.1 must: • Increase the competitiveness and sustainability of local rural services • Demonstrate capacity to maintain or develop basis rural services • Support opportunities in rural areas for young people • Support the multiple use of local assets • Complement existing provision.	Capital and revenue

Fund	Requirement	Notes
Measure 3.2 – Investing in the rural tourism product	This measure is about improving the tourism product and thus increasing the economic benefits that derive from tourism. It includes activities that involve: converting buildings and infrastructure for tourism; enhancing visitor attractions based on heritage; upgrading visitor information and interpretation facilities; developing recreational routes; and reclaiming land and addressing dereliction. Projects under this measure will be scored against the following criteria: • Increase the economic/employment benefits from tourism in rural areas with emphasis on out of season all year round business • Demonstrate capacity to increase quality and duration of employment in rural areas • Demonstrate capacity to increase tourism spend from outside the Objective 2 Programme area • Demonstrate ability to enhance visitor experience in the locality • Demonstrate ability to sustain the local economy, its culture, community and environment • Demonstrate ongoing viability for re-investment / operation • Complement and enhance existing provision, avoid duplication. The Tourism Working Group selection criteria are: • Achieving a faster growth in tourism spend, thereby increasing the proportion of GDP arising from tourism and the number and quality of jobs supported by tourism; • Providing opportunities for new entrants and tourism related businesses across the region; • Increasing overall tourism trips and days through making tourism activity less seasonal, with significant increases in the shoulder months; • Increasing the number of overseas visitors; • Increase tourism in cities, towns, resorts and rural areas; • Focusing support and capacity building in economically deprived areas hardest hit by Foot and Mouth Crisis; • Enhancing the distinctive character and quality of the South West tourism product its destinations, accommodation, attractions, access and service attitude; Supporting the creation of higher quality jobs.	Capital, or revenue associated with a capital project. Measure 3.2 is under heavy pressure and has a set of iterative deadlines for expressions of interest. Target Products are • New or refurbished high quality tourism related businesses, facilities and initiatives relevant to market needs in cities, towns, resorts and rural areas; • Businesses operating on an annual, rather than seasonal basis; • Businesses based on local culture and heritage; • Businesses which markedly enhance the quality of the overall "SW tourism" product, in particular attitude to service. Target Markets • Those who wish to visit either cities, towns, resorts or rural areas; • High spending tourists e.g., (Social Class AB, from London/South East and overseas); • Tourists in the 45+ age group and families with young children; • Tourists who wish to participate in cultural activities; and • Those tourists willing/able to visit out of season or in the 'shoulder' months.

Fund	Requirement	Notes
Measure 3.4 – Promotion and development of the regional distinctiveness of the area	This measure aims to increase the competitiveness of tourism businesses and identify and target new markets to increase the number of visitors. This can involve: promotional campaigns (particularly in conjunction with Objective 1); and bespoke marketing for regional heritage. • Increase competitiveness of tourism businesses, increase visitor numbers and spend especially out of season / all year • Demonstrate capacity to attract additional visitors to the Objective 2 Programme area • Complement the Cornwall Objective 1 Programme and other regional initiatives • Demonstrate partnership working to create the critical mass for effective action • Demonstrate wider linkages to the local economy / community – not just tourism – develop regional distinctiveness • Provide evidence / research on market demand / potential • Demonstrate links to investment in visitor attractions and facilities.	Revenue As per measure 3.2
SWRDA		
Regional outcomes	SWRDA has specific targets in the following areas, and projects should help SWRDA achieve as many of them as possible: • Economic growth • Reducing the number of income support and jobseekers 'allowance claimants, and unemployed claimants, in the most deprived wards • Ensuring that the rate of growth in the population of urban areas remains on its current trend • Reducing the productivity gap between the least well performing rural areas and the SW median • Supporting the regeneration of market and coastal towns • Building housing on previously developed land • Maintaining the region's employment rate above the national average • Ensuring that there is a skilled and qualified workforce.	
Annual milestones	In addition to the targets above, SWRDA has some more specific annual targets, in the areas listed	

	below. Again projects should identify their contributions to as many as possible: • Creating job opportunities • Creating learning opportunities • Developing brownfield land • Business start-ups • Securing private finance that benefits deprived wards specifically, and the region generally. • Supporting housing units • Developing workspace • Securing additional visitor spend	

8.7 The above tables indicate that the desired outputs of the WHS Bid Partnership could meet the required outputs of major funders in a number of areas. There are a number of monitorable outputs that do not directly relate to the needs of funders. Whilst all of these are worthy in their own right, some will be easier and more cost-effective than others to realise.

8.8 There a number of outputs that do not directly relate to the needs of funders. Whilst all of these are worthy and some are relatively straightforward to monitor, others may be more difficult to realise e.g. measures relating to civic pride.

8.9 Some could be captured using well targeted and refined surveys of visitors carried out at relevant sites, including: annual distribution of visitors; number of foreign visitors; visitor overnight stays. Plans for such surveys should be drawn up as soon as possible if this is the desired route. However, some other desired outputs including the level of international awareness, the number of tour guides advertising WHS-related activity and the number of businesses exporting relevant skills abroad, would require more specifically tailored work to be captured, and a judgement over cost-effectiveness would have to be made in due course.

Other Indicators

8.10 In addition to the monitoring indicators explored through the consultation process and the relationship between WHS projects and funding regimes, there are a number of other potential outputs which have emerged through this study that should be considered as part of any framework for assessing projects.

8.11 These would include:

- Social and community benefits – in the same way that other regeneration programmes will typically have social and community benefits, WHS projects can also be assessed against their contribution to the social and community objectives. Consultations indicate that the investment in regeneration projects will have positive effects on civic pride, leading to a virtuous circle of increased private investment, reduced vandalism etc.

- Environmental benefits – maximum benefit is accrued from projects that are able to provide benefits across a set of indicators. The use of mining heritage remains for leisure and commuting walking and cycleways (Mineral Tramways) provides good examples of this sort of project.

- Fit within the hierarchy of WHS attractions and facilities – discussion earlier in the report notes the importance of the relationships between the different elements of the mining heritage attractions and facilities, and how this is presented to visitors. Consideration of this relationship is important in new facility development

- Fit with other leisure facilities in Cornwall and West Devon – while mining heritage can be considered as a discrete entity, physically and particularly in the eyes of visitors, it exists in the context of a variety of other leisure opportunities. This juxtaposition can have a significant impact on the usage and viability of projects

- Viability – the ability of projects to meet their costs through revenue generation will be a key consideration. While the funding programmes will often consider capital costs, there is much less enthusiasm for meeting ongoing revenue spend. Therefore projects which are able to build economic re-use of mining heritage remains should be considered more of a priority than those requiring some kind of long term support, unless there are compelling reasons otherwise. Therefore, generating new employment or residential uses of mining heritage should be considered

- Contribution to the conservation of mining heritage assets in Cornwall and West Devon – while many of the benefits of WHS inscription may stem from the visitor impacts, the central rationale for inscription revolves around the mining remains. Any framework for assessing projects must therefore include an evaluation of the contribution towards conserving the core of the WHS

- Branding of Cornwall as an area of international significance - by branding Cornwall as an area of international significance in terms of its historic environment and culture, World Heritage Site status is expected to bring about a change in how the region is perceived by both local people and visitors. This will be particularly true of the deprived former mining areas that have suffered most from decay and unemployment. WHS status will help to instil a sense of pride of place amongst inhabitants of these areas (and the region as whole), making them more attractive places in which to live, work and invest. As has been the case with other World Heritage Sites, inscription is expected to act as an attractor to inward investment by companies looking for attractive/prestigious locations in which to site their businesses e.g. Toyota inward investment in Derby influenced by Derwent Valley WHS inscription).

- Heritage and Green Tourism - World Heritage Site status will provide the following opportunities for heritage and green tourism:

  - It will allow Cornwall to be badged as an area of international importance in terms of historic mining remains, and will enable the World Heritage Site emblem to be used in promotional media for the region.

  - It will provide the mechanism for the cohesive and integrated marketing of these assets, both through promotional and interpretative literature and other media, and by creating physical links (eg via cycle routes along disused mineral tramway routes).
  - It will increase the number of visitors attracted to Cornwall for its distinctive environment and culture, particularly in terms of overseas visitors who will view WHS status as a mark of quality.
  - The potential for marketing the WHS overseas is considerable. Countries which have the focus of Cornish immigration could be specifically targeted (a 'Cousin Jack' marketing strategy).
  - As an international heritage destination the WHS will attract visitors likely to have comparatively high disposable incomes, which will increase the value of the Cornish tourist industry.
  - In addition, the World Heritage Site will enhance opportunities for extending the tourist season into the spring and autumn. Visits to historic mining sites can take place at any time of year (indeed many sites are better seen in early spring or late autumn when reduced vegetation cover offers increased visibility).

- Local Business Opportunities - New businesses will be set up (and existing ones expanded) in association with the World Heritage Site. Examples of these are as follows.
  - Specialist conservation, building, design, engineering services connected with improving safety and access and consolidating historic structures on mine sites, and the conversion of historic buildings within former mining settlements.
  - Conservation and other services associated with on-going site maintenance within the World Heritage Site.
  - Companies producing specialist materials/fittings/equipment etc required for the consolidation and maintenance of the WHS.
  - Office/retail/workshop based industries located within converted historic buildings.
  - Leisure and retail-related businesses, eg bike-hire businesses connected to the trails created along former mineral tramways, outdoor clothing companies, crofty-type jewellery and other crafts, art-based activities, cafes and restaurants etc.
  - Publishing companies involved in producing interpretative/promotional literature associated with the World Heritage Site.

- Intellectual Capital - As a result of compiling the nomination for WHS status and managing and promoting the WHS assets, Cornwall will develop a wide range of high quality specialist skills and expertise. There will be considerable potential for using this intellectual capital to generate additional income for the region. Some examples are given below.
  - Selling the methods and techniques applied in Cornwall to other parts of Britain and other countries.
  - Providing advice and training in specific methods and techniques (eg engine house consolidation) to individuals/organisations in Cornwall, Britain and overseas countries with similar remains and/or undertaking similar work/projects (this has particular relevance for those parts of the world that have surviving 'Cornish Mining' remains, eg western USA, southern Australia, Mexico, Ireland, Spain, Virgin Irelands).

  - Providing the professional staff and skilled crafts people to carry out conservation and other work historic mine sites overseas.
  - Providing specialist study tours for visiting organisations (eg schools, universities, societies, businesses).
  - Film and television productions.

- WHS Implementation Project - In line with other UK World Heritage Sites, implementation of the Cornish WHS Management Plan (once the site has been inscribed) will be overseen by a WHS Implementation Officer, supported by other project staff. This will create/safeguard a small number of highly skilled jobs in the region.

Project Monitoring Framework

8.12 Consideration of the factors above suggests that a framework for assessing WHS projects should include:

- Conservation of the resource
- Visitor spend
- Visitor seasonality
- Jobs created and safeguarded
- Impact on dependant business turnover
- Funding leverage
- Impact on civic pride
- Integration with education objectives
- Economic reuse of sites
- Strategic fit with other mining heritage provision
- Strategic fit with other leisure provision

8.13 All of the considerations above should be in the context of strategic fit with the WHS management plan.

8.14 It is recommended that the future WHS Management Team consider the suggested elements and prepare an application, scoring and appraisal system based on the agreed indicators. The requirements of the funding agencies will be a key issue and it will be helpful to projects, the Management Team and funding agencies if the scoring and appraisal system complements the agencies systems. It is recommended that a dialogue is maintained.