



EXPERIENCE WEST CORNWALL

PERFORMANCE EVALUATION

Economic, Environmental and Social
Performance Evaluation

March 2023

Gwelen © Mike Newman

Newlyn Harbour morning © Mike Newman





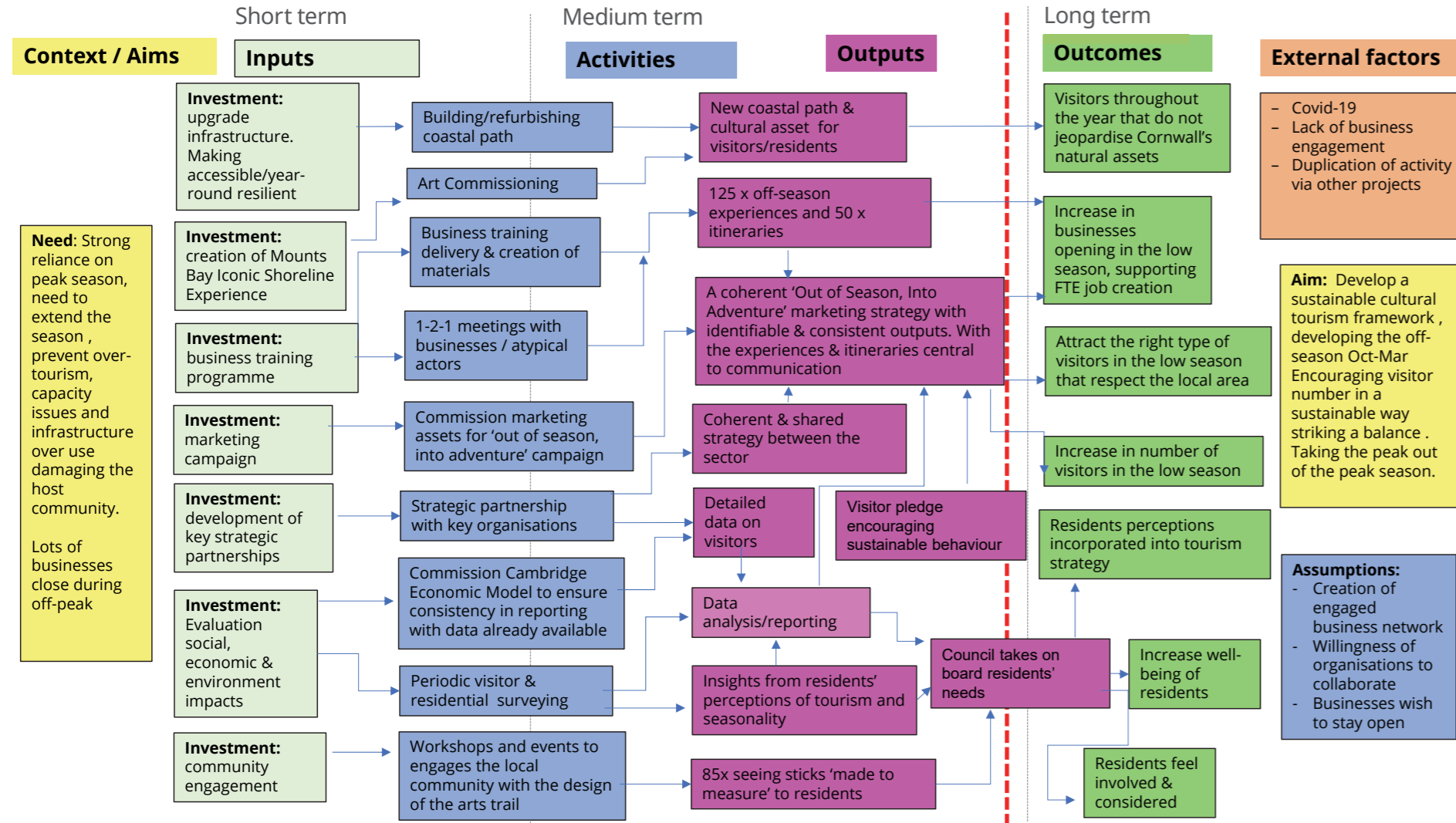
CONTENTS

4	PP10 Theory of change	31	Delivering economic, environment and social evaluation
6	Delivering actor engagement and training	31	Overview
6	Overview	33	Economic evaluation
8	Outcomes	35	Data analysis
9	Lessons learned	45	Case study
10	Delivering experiential tourism	47	Environment evaluation
10	Overview	49	Data analysis
14	Outcomes	56	Case study
15	Lessons learned	58	Social evaluation
16	Case study	59	Data analysis
18	Delivering off-season infrastructure	68	Case study
18	Overview		
19	Outcomes		
20	Lessons learned		
21	Case study		
23	Delivering marketing		
23	Overview		
27	Outcomes		
28	Lessons learned		
29	Case study		

PP10 THEORY OF CHANGE



At the outset of the project, a theory of change model for the West Cornwall pilot area was created. This provided the strategic framework for the implementation of the project and its deliverables.



BRINGING THE CULTURAL AND TOURISM SECTOR TOGETHER TO ENCOURAGE A SUSTAINABLE YEAR-ROUND VISITOR ECONOMY



Filmhouse © Mike Newman

DELIVERING ACTOR ENGAGEMENT AND TRAINING TO MEET DEMAND

T1.2.1 Local/regional active engagement events with pilot study actors

Cornwall Council held **18 EVENTS WITH LOCAL AND REGIONAL STAKEHOLDERS.**



MIX OF IN-PERSON AND ONLINE EVENTS



These events engaged **30 ORGANISATIONS AND BROUGHT TOGETHER A TOTAL OF 87 PARTICIPANTS.**

Participating organisations included 1 sectoral agency, 1 regional public authority, 1 higher education & research, 2 national public authorities, 5 local public authorities, 2 infrastructure and public service providers, 9 interest groups incl. NGOs, 7 SMEs, 2 enterprises and 5 business support organisations.

At these engagement events, the EXPERIENCE team introduced the aims of the project and the goals of the new out-of-season tourism strategy. Together, these sessions helped shape the pilot study regional network (T1.2.2).

T1.2.2 Pilot study regional networks

Cornwall Council created **1 NEW REGIONAL NETWORK OF BUSINESSES WHICH INCLUDES 201 LOCAL ORGANISATIONS.**

The network has engaged key regional stakeholders as well as a wide range of actors from local micro-SMEs to large organisations such as the National Trust. The regional network has met in different subgroups to tackle specific topics and challenges. For example, whilst the initial meetings to shape

the direction at the start of the project included strategic actors such as local town council members, representatives from the regions' DMO, the town BID etc, the more recent engagements have been focussed on defined outcomes such as the marketing consultation meeting. Cornwall Council keeps the full network updated on a regular basis via a newsletter and business network platform hosted on 'Let's Talk' engagement platform.

To foster a bottom-up approach, the network has met in different ways: from 1-2-1s with specific businesses to themed group meetings to discuss collaboration and working together. From these regular engagements, PP10 identified the gaps in skills and developed a bespoke training programme, created, tested and launched experiential tourism offers and embedded sustainability in off-season offers.



Printmaking Lee Stevenson © Mike Newman



T1.3.1 Skills audit and training needs analysis



Cornwall Council conducted **1 SKILLS AUDIT BY DISTRIBUTING THE BUSINESS SKILLS ANALYSIS SURVEY IN WINTER 2020/21.**

There were 42 respondents, with 21 surveys fully completed. This response rate equates to 10% of respondents of businesses, with 5% complete. From data collected, it was clear businesses did not have any bespoke offers for out of season and there was strong demand to diversify their business model and to create out of season offers as well as a need for digital marketing skills development to support promoting out-of-season offers. This initial set of data **HELPED INFORM THE FIRST AND SECOND WAVE OF TRAINING INCLUDING TRAINING SESSIONS DELIVERY (T1.3.3) AND MATERIALS (T1.3.2).**

T1.3.2 Targeted, bespoke training materials and services



By end of December 2022, Cornwall Council has created **40 TRAINING MATERIALS.**

The result from the skills audit and training needs analysis (T1.3.1) enabled PP10 to create bespoke training materials. The materials are varied to appeal and engage the widest range of actors; there are **10 VIDEOS, 26 PRESENTATIONS AND 4 ACTIVITY SHEETS.** With the unexpected circumstances of the global pandemic, training materials cover topics such as "Recovery & resilience after Covid-19", but also digital marketing such as "How to Create Good Content" as well as guidance on meeting a range of consumer expectations "How to Create Your Accessibility Statement".

T1.3.3 Training delivery

At the end of December 2022, **CORNWALL COUNCIL HAS DELIVERED 156 TRAINING DELIVERIES.** The sessions have been **A MIX OF ONLINE AND IN-PERSON** and include training workshops with one or multiple speakers, as well as 1-2-1 business mentoring sessions and online video views. Most training delivery was carried out during the autumn/winter months when businesses have more availability to take part in this type of activities, but it also coincided with restrictions imposed by the pandemic. Therefore, PP10 favoured online methods as the ability to meet in-person was greatly reduced. Cornwall Council delivered 4 in-person training session, 25 online and there were 109 individual views of the training videos. **THE TRAINING PROGRAMME ENGAGED 291 INDIVIDUALS.** Topics for the workshops have ranged from resilience and recovery after the impact of Covid-19, experience development for out-of-season offers, tapping into the cycling audience market as well as digital marketing skills and how to make your business more accessible.

WPT1

OUTCOMES

The business engagement and training programme has created a hyper-localised network of businesses who share an interest in staying open year-round. EXPERIENCE has given the tools and confidence to either extend their opening hours or remain open throughout the winter months. This network building has nurtured businesses who have been able to collaborate, share resources and test each other's offers.

The training materials have been distributed to the network and are available online, offering a legacy of skills development assets that can be used in the future. Businesses have developed new or adopted offers that are fit for the autumn/winter months. For many, it has been about confidence building and finding strength within the network. Institutions such as the National Trust are looking at how to extend contracts, creating full-time permanent employment and smaller SMEs like the Hoxton Special are extending their opening times through the winter.

.....



The training materials offer
**A LEGACY OF SKILLS DEVELOPMENT
ASSETS THAT CAN BE USED IN THE FUTURE.**



Penlee Gallery © Mike Newman



Photo experience maker © Celine Holman

WPT1

LESSONS LEARNED

What went well

- ✓ The training programme was greatly received by the local business community who have recognised the value of opening out-of-season and we have definitely seen a trend of businesses making changes to their business model
- ✓ EXPERIENCE has built a network made up of local businesses, organisations and charities from scratch. This new network has fostered collaborations and is linking up the different actors in the pilot region.

What we would do differently

- 💡 As a local authority, Cornwall Council is not the typical tourism industry organisation and engagement with businesses was slow and at times difficult. But with perseverance and time, the business community did sign-up and participate with help from key players such as the local chamber of commerce, tourist associations and town BIDS/councils.
- 💡 Sign-up to training has been a bit erratic with varying numbers of participants depending on topics. We grew our numbers by more advertising and promotion on social media platforms and when pushed by key stakeholders.



Dawn swim Penzance © Mike Newman

DELIVERING EXPERIENTIAL TOURISM OFFER USING UNIQUE NATURAL AND CULTURAL ASSETS

T2.2.2 Off-season tourism activities/experiences

Taking a bottom-up approach, an options analysis (T2.2.1) was conducted in 2021 and identified **SIX THEMATIC CATEGORIES** for the curation of activities/experiences and subsequent itineraries in WPT2. These categories maximised the unique assets of the West Cornwall pilot area whilst capitalising on its unique sustainable cultural tourism offer. The identified categories were **ADVENTURE, HERITAGE, CULTURE, ENVIRONMENT, FEAST AND COAST**.

Working with atypical actors across different sectors, an experience database/collection was created, featuring **138x activities**. The activities were curated with a sustainable cultural tourism criteria in mind, that primarily looked at sustainability credentials of SMEs and the unique sense of place it offered.

Building on the work on WPT1, the business engagement and training process took SMEs on a journey to understand the benefits of sustainable cultural tourism and the opportunity experiential tourism offers for year-round appeal. Enabling businesses to review their existing offer and either create new or adapt their existing activities to create a low-season/sustainable/cultural experience. This approach resulted in the creation of experience database with a breadth of experiences (both free and paid for) within the themed categories that are authentically local. From foraging, paddleboarding, wild sea swimming, learning to paint, print making, bird watching, tin mining tours, walking excursions, underground cave exploring, to beach cleaning, they all represent the distinct identity of West Cornwall.

A key experience funded by the project - **'MOUNT'S BAY SHORELINE EXPERIENCE' - CREATED A NEW AND UNIQUE CULTURAL LANDMARK**. This was the focal point for the experience database and marketing

campaign. This piece of work technically falls within WPT3, however it is central to the new off-season offer and is a 'star experience' for the project's marketing, it felt important to reference here. The Mount's Bay Shoreline Experience comprised of an upgraded coast path (resilience for year-round usage and accessibility for a variety of different users), and the installation of Gwelen art works, which combined with creative multi-sensory interpretation, reinvented the capital assets for visitors and residents' usage year-round.

Each of the experiences in the database was assigned categorisation for accessibility rating and public transport connectivity. For accessibility, we worked with accessibility consultant, **ACCESS CORNWALL**, who **SET A CATEGORISATION GRADING: MOBILITY - HEARING - VISION - SENSORY - LEARNING** - and applied to each experience. Experts in their field, they reviewed and tested each individual experience in the database for accessibility grading, resulting in **94% BEING ACCESSIBLE**.

In addition, each experience was reviewed for **PUBLIC TRANSPORT CONNECTIVITY** with a similar grading system applied - **REACHED BY TRAIN, BUS OR BIKE, A SHORT WALK FROM BUS STOP OR TRAIN STATION OR CAR (only where no public transport is available)**. With all supporting copy to encourage use of public transport and avoid use of car unless absolutely essential.

We also worked with CIC **SUSTAINABLE PENZANCE** (pioneers on sustainability and responsible for Penzance's Plastic Free town status - the first in the UK) who **PREPARED 'ECO-TIPS' FOR EACH OF THE EXPERIENCES ON THE DATABASE**, which encourages the use of refill water stations, public transport and buying local.



T2.2.4 Package and curate activities into themed itineraries



The experience developed in T2.2.2 have been curated into **51X 'OFF-THE-SHELF' ITINERARIES** which fit within the six themes identified in the options analysis.

These itineraries are well-structured and meet marketplace demand, following an in-depth consumer product testing process.

All itineraries are written in the creative campaign tone of voice and appeal to pre-determined target audiences (empty nesters and free & easy

travellers). The 'out of season, into adventure' creative campaign messaging interweaved throughout all itineraries with accompanying images validate this messaging. The itineraries successfully convey the surprising factor of a visit to West Cornwall in the low season and encourage a change in booking behaviour. This approach provided visitors with a consistent and coherent set of design assets that conveyed the project's messaging and emote the change in perception of visiting West Cornwall in the low season.

Type of itinerary themes include artistic heritage, maker's break, ancient sites, night sky adventures, low tide adventures, sustainable stays and a taste of PZ.

With accessibility and public transport connectivity assessed for each individual activity, the combined curated itineraries give an accessible and connected view of the West Cornwall area.

There are a number of different itinerary options available:

OFF-THE-SHELF/ADAPT

This approach presented the 51x 'off-the-shelf' itineraries in a uniformed and easy-to-understand format with set sections: itinerary name and introduction paragraph; key categorisation - duration and activity level; followed by the featured activities (the number included in the itinerary depends on the duration) and a place to eat (each activity has accessibility and public transport connectivity grading applied); bookmarked with key fact box information such as, where to stay, travel planning and a visitor pledge (created by Sustainable Penzance) that encourages visitors to make (encouraging respect to the host community). These itineraries are presented online and follow the same design.

The results from consumer product testing highlighted visitors prefer a less prescribed approach than dictating activities day by day/hour by hour. It highlighted visitors require a level of freedom and a 'mix and match' approach to their time, and the 'off-the-shelf' itineraries incorporates this feedback. The experiences in these itineraries can all be enjoyed individually or as an entire itinerary (ranging from 1 day - 7 days duration).

BESPOKE ITINERARIES/ADAPT

In addition, visitors have the option to create bespoke itineraries via the itinerary builder (see T4.3.2) on Love Penzance Experience West Cornwall micro-website. Effectively users, can select activities from the experience database they would like to do and build their own unique itinerary in real time.

T2.2.5 Exciting interpretation

Cornwall Council has created **9X EXCITING PIECES OF INTERPRETATION**.

- (1) A booklet 'Rituals & Practices for Conjuring the Forest' has been published and is available to download online. It contains activities, poems and prompts to explore the natural landscape in and around Mount's Bay.
- (2-7) Six podcasts have been created and are available to listen to online. They each uncover different aspects of the art trail 'Gwelen'. They include interviews with people who have a special relationship to Mount's Bay and explore the unique history, geology and culture of the bay.
- (8) A digital trail is available online. The guided audio walk is designed to be listened to whilst experiencing the Mount's Bay coast path. It directs you whilst walking and gives you specific stories that relate to the surrounding landscape.
- (9) Interpretative signage installed along the Mount's Bay coast path bring to life the many stories associated to the bay. Panels include stories of real people told in their words, facts and prompts to explore the bay with the senses. The new interpretation has been made with input from Access Cornwall and includes prompts to explore the landscape with the senses as well as audio versions of content accessible using QR codes for those who have vision impairment.



Gwelen interpretation © Celine Holman



Gwelen interpretation © Celine Holman

“ The interpretation complements the art trail 'Gwelen' and enhances the experience along the Mount's Bay coast path, making it the star experience. ”



Footpath Marazion sunrise © Mike Newman

T2.2.6 Closing last mile gaps

During the project, Cornwall Council identified a disruption to the visitor experience: the star experience Mount's Bay Iconic Shoreline Experience needed clear signposting and information to ensure visitors using sustainable modes of transport could enjoy/find it. Cornwall Council designed, fabricated and installed welcome and wayfinding signage. The **SIGNAGE PROVIDES CRITICAL DIRECTIONAL INFORMATION TO CLOSE THE LAST MILE GAP**. It signposts Mount's Bay coastal path from the railway station and bus station, linking the walking and cycling routes to public transport connections.

WPT2

OUTCOMES

The bottom's up approach to business engagement, **lead to the curation of the 138 x activities on the experience database/collection**, which informed to the compilation of **51x 'off-the-shelf' itineraries** and **1x itinerary builder platform on LovePenzance.co.uk**. Collectively, with the 'Mount's Bay Shoreline Experience' cultural landmark acting as the 'star experience', Experience West Cornwall created a low season tourism offer to appeal to visitors, which was integral to driving WPT4 marketing campaign. The **itineraries on LovePenzance.co.uk was the best performing section of the website during a 4 week period** (Jan 2023 - 1.5k visitors).

Providing a centralised approach to the curation of the low season offer SMEs/actors have worked collaboratively towards a greater combined benefit for the entire area. Using the unique sense of place and cultural roots of experiences, the curated itineraries intuitively appeal to visitors who respect the local area and do not jeopardise the area's natural assets.



The itineraries on LovePenzance.co.uk was **THE BEST PERFORMING SECTION OF THE WEBSITE DURING A 4 WEEK PERIOD**



Foraging © Mike Newman

75% of the itineraries are accessible, which has increased the accessibility of the existing tourism product. The new interpretation that accompanies the art trail 'Gwelen' has been created in collaboration with Access Cornwall a community-interest-company that provides accessibility support and information about places to visit and explore around Cornwall. The signage is designed to be as inclusive as possible, with audio versions of the content for those who are visually impaired, and the text contains sensory prompts for those who may be neurodiverse. This ensures the Mount's Bay Iconic Shoreline Experience is as inclusive as possible to a wide range of needs.

Boosted by **9x exciting pieces of interpretation** and **closed 1x mile gap**, the collective outputs of WPT2 provided a unique low season tourism offer to attract low season visitors.

WPT2

LESSONS LEARNED

What went well

- ✓ This project and its objectives aligned with Cornwall Council's key strategic priority to support the facilitation of a sustainable cultural tourism model. Taking a strategic approach enabled us to collaborate with the cultural department on its work surrounding Cornwall's creative manifesto and its ambitions to establish Cornwall as the UK's 'leading rural' creative economy. Combining efforts in this way, provided momentum for strategic outcomes and protected the legacy of the project.
- ✓ At the outset, the decision was made to focus on one specific geographic area to redistribute the flow of visitors to the low season to a non 'honeypot' area. By taking a hyper geographic approach to West Cornwall, it enabled us to put a closer spotlight on the area's distinct identity and carefully curate the activities to communicate its unique selling points.
- ✓ The local area is a treasure trove of ideas, and many SMEs were already developing innovative and sustainable approaches to developing their low season offer. This progressive outlook of the area enabled us to act as a facilitator to an already receptive audience and effectively act as a coordinator of activities and marketing curator.

- ✓ At the outset, a tactical decision was made to partner with LovePenzance.co.uk on the creation of the itinerary builder platform rather than build a new solus website for the project. LovePenzance.co.uk is the leading and most trusted visitor/destination website for the local area, which is owned and managed by PZ BID. This website is the number one website for people searching for holiday inspiration in the localised area, and rather than set up a new website that would effectively galvanise traffic from here, we entered a formal agreement with LovePZ to create a Experience West Cornwall micro-website within the main Lovepenzance.co.uk wireframe. This approach allowed us to lean on the authority of the existing website, capitalise on its traffic whilst securing the future of the itinerary builder until 2025 and beyond (as part of the agreement, PZ BID will continue to manage the content once the funding project team disbands). This has proved a successful strategy, enabling us to be smart with budgets and secure the legacy of the project, whilst complimenting the wider work in the area.

What we would do differently

- 💡 Business engagement is key and engaging businesses at the beginning of the project is integral to success. However, it takes considerable time, and we would have done in person events from the start (was not possible due to covid restrictions) and also allowed longer for the final results to really be felt. We know that many organisations are working on activities, but they take time to come to market.

CASE STUDY

Adapting our experience to make it accessible

Jack Roberts is the Operations Manager at Geevor Tin Mine and has been part of the business for over eight years, initially starting as a student and progressing to Operations Manager.

WHAT WE DO:

Geevor Tin Mine in Pendeen was the last mine to work the famous St Just Mining District, the site of the largest number of undersea tin and copper mines in the world!

Today Geevor is a family friendly, year-round, multi award-winning heritage attraction and museum. Our rich mining history set in the wild and rugged landscape on the North Atlantic Coast makes Geevor a must visit location within the Cornish Mining World Heritage Sites.

The site is brought to life with a real underground experience, poignant areas of the site left unchanged, machinery demonstrations, interactive exhibits, and stories from tour guides recalling their time working at Geevor.

Extensive restoration of the site has taken place since it reopened as a museum in 1993, this year in particular the Victory Shaft Headgear has been restored and will be reopened to the public in early 2023.



HOW WE DO IT:

We created the Geevor 360 VR tour – a pioneering 360-degree virtual reality tour, which opened up parts of the site that can be harder to access due to their industrial nature. The VR Tour is provided to improve access to Geevor.

The VR “tour”, viewed through an Oculus headset, gives access to parts of the eighteenth century mine-workings and twentieth century mill, in their breath-taking setting upon and beneath cliffs near Land’s End, for people who would not otherwise get to enjoy all Geevor has to offer.

The tour gives a chance for even more visitors from far and wide to experience some of the most impactful and engaging parts of a visit to Geevor.

Geevor Tin Mine was involved in the Tin Coast partnership, which had very similar objectives to EXPERIENCE project. EXPERIENCE West Cornwall is supporting on promotion of the Geevor 360 VR tour.



OUR TIP:

Whenever introducing accessibility tools to your business or premises it is vital to work with interest groups. Involve those who will directly benefit from the tools you are introducing in the decision-making process. We worked with the Sensory Trust and Heritage Ability charities that have greatly improved the accessibility of our site, with invaluable technical and expert advice.

DELIVERING OFF-SEASON TOURISM INFRASTRUCTURE

T3.2.1. Upgrade tourism infrastructure

This includes the refurbishment of the Penzance to Marazion coastal path and the art trail along the coastal path 'Gwelen', a new site-specific artwork for Mount's Bay. The infrastructure upgrade includes the complete resurfacing of the 2.6 m coastal path which is now fully accessible for pedestrians, cyclists, wheelchair users, prams and pushchairs. The coastal path re-opened in autumn 2021 and residents as well as visitors have been enjoying the new infrastructure. The upgrade also included the resurfacing, white-lining, new kerbing of 2 car parks (Marazion & Longrock) which now have dedicated and safe routes for pedestrians and cyclists through them. Cycling racks, benches, seating and picnic tables have been installed as well as soft landscaping and planting which has been carried out along the length of the coastal path. Feature inlays have been installed to clearly signpost destinations along the route.

The art trail 'GWELLEN' BY ARTIST EMMA SMITH AND RESIDENTS OF WEST PENWITH IS MADE OF 85 SCULPTURES ALONG THE MOUNT'S BAY COASTAL PATH. The artwork is an invitation to rest and imagine the ancient, submerged forest hidden in Mount's Bay, an enchanting phenomenon that is rarely seen, occasionally uncovered at very low tides. Each sculpture has been made to the measurements of local people with OVER 600 RESIDENTS CONTRIBUTING IDEAS ON HOW THEY WOULD LIKE TO SIT OR STAND WHILST PAUSING ALONG THE COASTAL PATH. Contributors to the designs include local residents, students from schools, community groups as well as individuals who responded through an open call.

The Mount's Bay Iconic Shoreline Experience is being marketed as the region's star attraction and is central to the targeted marketing campaign (T4.3.1).

Cornwall Council has completed 1 TOURISM INFRASTRUCTURE UPGRADE, THE MOUNT'S BAY ICONIC SHORELINE EXPERIENCE:



Path walkers Penzance to Marazion © Mike Newman



Gwelen artworks © Mike Newman

OUTCOMES

In our resident survey we found that over half, 54%, of those taking the questionnaire used the Mount's Bay coast path on a regular basis prior to the refurbishment works (30% monthly, 19% weekly, 5% daily). And on average since winter 2021/21, 79% of residents stated they would use it more once it was fully refurbished.

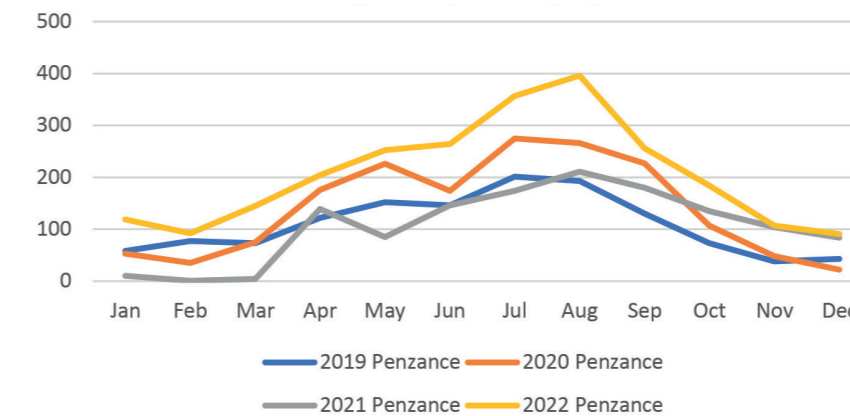
Since completion of the refurbishment work, we have seen a steady increase in use by residents and visitors. The use of the Mount's Bay coast path has majorly increased in 2022 in comparison to 2019 & 2020. See graph below.

There has also been a considerable increase in use out-of-season. **Between winter 2019/20 and winter 2021/22, the daily use of the coast path has more than doubled, with a 117% increase in use by cyclists, October-March.**

The Mount's Bay coast path is now fully accessible for wheelchair users and with new seating, benches and tables, people with reduced mobility can also enjoy the additional resting points along the route. The path is being used by local walking groups including participants whose sessions are organised through NHS social prescribing.

By creating the site-specific art trail 'Gwelen' with input from local residents supported by a series of social engagements (workshops, talks, events) ran by the artist Emma Smith with the local community, Cornwall Council has ensured this iconic piece of infrastructure is deeply rooted in its locality and place, creating long-lasting place-making of the art commission.

MOUNT'S BAY COAST PATH AVERAGE DAILY USE BY CYCLISTS



WPT3

LESSONS LEARNED

What went well

- ✔ We wanted to leave a positive impact for the local community and visitors alike, and we identified the creation of a cultural landmark (reinventing an existing capital asset) to help to encourage a new perspective and leave a positive impact. This proved a successful tactic for us, particularly within the framework of hyper localised tourism.
- ✔ The infrastructure has been developed as a partnership between the Economic Growth and Transport departments of Cornwall Council. To ensure both parties had clear roles and responsibilities, it was really important to put in place a Service Level Agreement. With this foundation established at the outset, both departments have worked really well together.
- ✔ The art trail 'Gwelen' was commissioned by a panel which included representatives from the cultural sector (Newlyn Art Gallery/Tate St Ives) as well as local elected members and representatives of the local community. The panel judged and scored the proposals that were submitted through the open call tender. Transparent decision making with input from local representatives ensured the chosen commission was high-quality and responded to the needs of the community.

What we would do differently

- 📍 Whilst the art commission has been a success, the process could have been improved by employing an arts consultant with specialist expertise in public art commissioning to help guarantee the best outcome for all involved. A public art consultant /curator supports all parties and takes the pressure off internal staff and the artist. Also, well before an artist is appointed, they can help develop a tailored application process that works within internal tender processes whilst also being streamlined and appropriate for working with artists.



Penlee Gallery © Mike Newman

WPT3

CASE STUDY

Design year-round inclusive infrastructure, to create benefits for all.



Rebecca Lyle is Principal Transport Officer at Cornwall Council

WHAT WE DO:

Active travel is at the heart of Cornwall Council's objectives as it helps reduce our carbon footprint and increases year-round well-being for locals and visitors. We encourage people to travel within, and to Cornwall, by using public transport or by walking and/or cycling, and we recognise the need to design year-round inclusive transport infrastructure.



HOW WE DO IT:

We create new trails and routes across Cornwall. In West Cornwall, the path linking Penzance to Marazion is a unique asset for pedestrians and cyclists and is an important part of a wider community vision to deliver the Mount's Bay multi-use trail helping to connect residents and visitors to the maritime environment. Prior to the works, the route was unusable for wheelchair users and families struggled unable to use pushchairs due to the poor condition of the surface, particularly in autumn & winter. At times it was also difficult to cycle. Resurfacing the route to make it more resilient, creating safe passages through car parks, improving access ramps to the beach and providing benches and cycle parking has made the coastal path fully accessible all year round.

Connected to the railway station in Penzance, visitors can come by train with their bike, or hire one, and explore the surrounding landscape safely and easily. Since the re-opening of the route, we have seen a 70% increase in use by cyclists of the path out-of-season, creating demand for local hospitality businesses.

80% of residents feel that sustainable tourism should be more encouraged in their local area, and refurbishing the trail proves that tourism can bring large infrastructure to rural communities, helping shift negative opinions about tourism locally.

OUR TIP:

Celebrate and bring back to life existing assets. Build infrastructure specifically designed to be accessible to all and resilient to the impacts of climate change where possible. Make sure to include the needs of your residents as well as those of visitors to ensure the infrastructure maximises impact.



WPT4

DELIVERING EXPERIENTIAL TOURISM MARKETING AND DISTRIBUTION

All of the work in WPT1, WPT2, WPT3 and WPT5 simultaneously feeds into the delivery of WPT4s marketing strategy, which sole purpose is to drive the redistribution of visitors to the low season period and away from the honeypot areas. The marketing strategy and its resulting outputs successfully communicate the new low season tourism offer to the desired target audiences. Providing the final piece of strategy to create a sustainable tourism model, by ensuring the customer base are aware of the new tourism offer, giving reasons to book in the low season and change their booking behaviour.

WPT4 is ultimately the driving force to deliver against the overarching output of increasing visitor numbers and the focus of our marketing activity has always been on:

- Positioning the West Cornwall area as a leading low season destination and change perception by providing multiple reasons to book during Autumn/Winter.
- Communicating not on price, but uniqueness and the value it offers as well as public transport connectivity.
- Generating demand for authentic experiences during Autumn/Winter and providing a clear journey in the pre-planning process.

- Marketing the experience collection based on its unique and exceptional experiences that appeal to identified target audiences.
- Maximising digital tactics to smartly target audiences – with clear, tailored and targeted marketing messages.

T4.2 Market place testing

With all the work detailed in WPT2, it was integral for a selection of activities and itineraries to be tested with consumers and travel trade and incorporate findings back into the final outputs. At the outset, we identified a strategic need to work closely with Visit Cornwall on the delivery of this element of the strategy. Visit Cornwall is the destination management organisation for Cornwall and collectively leads on marketing for the area, so in the similar approach to the LovePenzance.co.uk partnership, an agreement with Visit Cornwall was formalised to collaboratively work together.

T4.2.1 Market testing with trade and distribution channels

Historically, Cornwall has not catered for the traditional travel trade market due to the size of businesses and its offer, so as a result has always

prioritised on the FIT market (fully independent traveller). For us at Cornwall Council, the travel trade is not a huge focus and it is an area that we do not operate in, but it remains an important part of the project's marketing campaign. By working collaboratively with Visit Cornwall, it enabled the in-house team to maximise their expertise in this area, whilst also delivering key findings that could be applied to the whole of Cornwall for many years to come.

It was decided to go back to basics and conduct a survey with Visit Cornwall's travel trade database to understand its needs, as this data did not exist. The survey was divided into two parts – the first section asks a series of general questions and the second section requires feedback on existing consumer itineraries, specifically how they can be made travel trade ready.

There was a relatively low response rate (10 travel trade buyers in total), but those that did respond felt there is a lack of bookable travel trade product in Cornwall. It also highlighted the type of information the travel trade like to see. Where relevant, these results were incorporated into the final designs of the travel trade itineraries, ensuring they were presented in a visual and easy to follow format for distribution.



Makers break

Working with Visit Cornwall, we conducted **CONSUMER TESTING PROGRAMME** with Visit Cornwall consumer database, **WITH OVER 1,000 PARTICIPANTS RESPONSES COLLECTED.**



T4.2.2 Consumer testing

Working with Visit Cornwall, we conducted **1 X CONSUMER TESTING** programme with Visit Cornwall consumer database, with **OVER 1,000 PARTICIPANTS RESPONSES COLLECTED.**

An online survey was distributed and asked target consumers their perceptions of 7x hero itineraries, specifically:

1. **ARTISTIC HERITAGE**
2. **BOUNDLESS BEACH**
3. **CONSCIOUS TRAVELLER**
4. **HOMEGROWN TIPPLE**
5. **MINING TRAILS**
6. **RAINY DAYS**
7. **ONE WITH NATURE**

Overall, the consumer testing provided positive feedback, with most feeling the itineraries **OFFERED A GOOD VARIETY OF IDEAS FOR A VISIT TO WEST CORNWALL**, presented in an informative, well thought out and easily digestible format; whilst being presented with appealing, vibrant and attractive photographs and the use of enticing words to encourage people to want to visit.

However, a key piece of feedback was to mix and match' approach rather than be too prescriptive. Some felt the itinerary needed more information about the provision of public transport, tide times, car parks, attraction opening times etc. to make visiting during the off-peak period easier. We used this data to inform stage two of itinerary development and all the feedback was incorporated into the final designed assets.

As part of this consumer testing, the "Out of Season, Into Adventure" creative marketing concept was also tested and was positively received. It also determined the channels to focus the marketing energies on, which highlighted DMOs, TICs, social media and PR as very important.

T4.2.4 Testing new offer and services in a digital lab

We used the digital lab findings to inform our marketing strategy and it helped determine our priority focus to incorporate video as a key marketing deliverable to inspire visits. The results from the Digital Lab showed that short and inspiration videos performed best when engaging audiences, and this was incorporated into our marketing video strategy. We used these findings to develop a video strategy and create content that appealed to audiences.

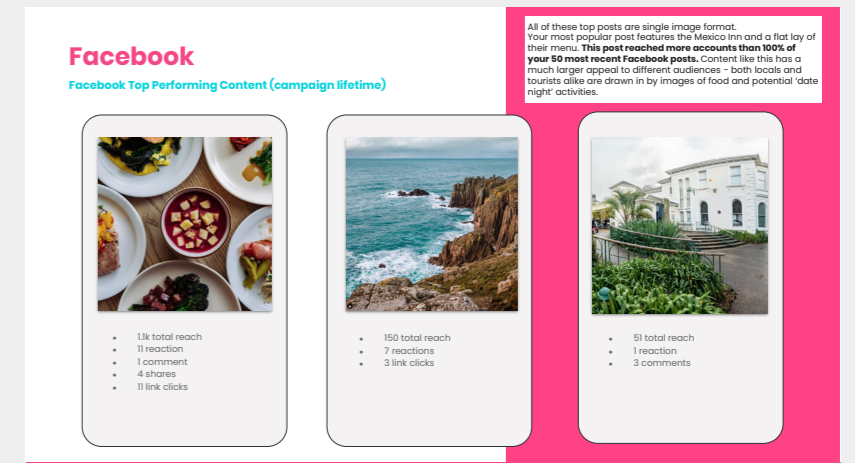
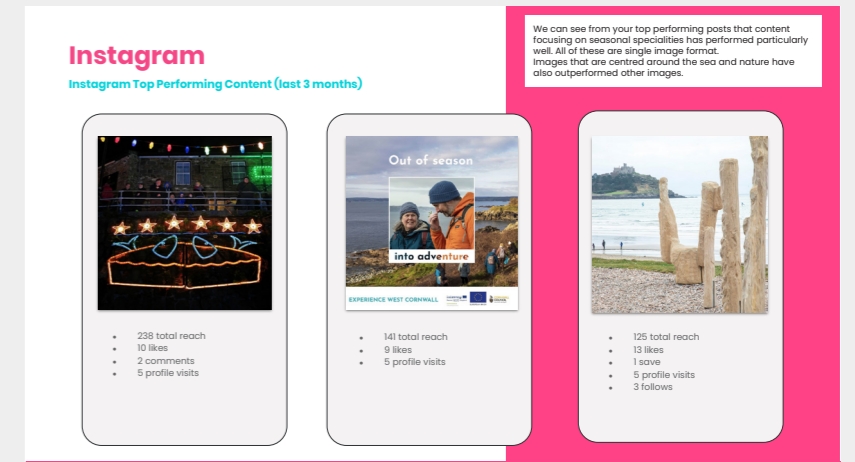
To validate the above findings further, we run own A/B split testing with our owned social media channels, which determined which creative worked best. This proved that moving gifs or scrolling gallery were the best received. See summary opposite.

T4.3.1 Targeted consumer campaign

We developed a coherent multi-platform marketing campaign, based on a central creative concept '**OUT OF SEASON, INTO ADVENTURE**'. Developed to appeal to identified target audiences (empty-nesters & free & easy travellers - gathered from data collection in WPT5) and utilised the most cost-effective channels to reach them in a timely manner. We knew from our research that Cornwall has a solid visitor base who repeat book, but often during peak season, so with a strong opportunity to encourage a change in current booking behaviour, the consumer marketing campaign focused its energies on this.

The creative consumer campaign reflected the negative impression people may have of Cornwall in the winter but turns it into a positive. It challenges the preconceptions about the 'best' time to visit Cornwall, by contrasting the negative perceptions of 'out of season' tourism with the very real, often surprising, benefits of visiting without the crowds.

The positioning informed the creative treatment for a cohesive campaign look, which is incorporated across print and digital materials that link all the campaign assets and itineraries together. From social campaigns, websites and media coverage, users draw links between the recognisable materials.





Mousehole © Mike Newman

There has been **15,000 VIEWS TO THE LOVE PENZANCE MICRO-WEBSITE SINCE NOV 22**, with it being the best performing landing page on the entire website in 2023.



Creating an overarching consumer campaign that target audiences are familiar and engage with at various points.

The campaign focused on key strategic partnerships with DMOs/TICs or equivalent to collaborate on marketing campaigns and resources, along with a designated press and digital marketing campaign (social media & video predominantly – both organic and paid for) to reach audiences effectively and draw out the unique stories.

T4.3.2 Online pre-visit inspiration and interactive trip planning platform

T4.3.1 consumer marketing campaign and resulting activity, directed users back to **1X ONLINE PRE-VISIT INSPIRATION PLATFORMS ON LOVE PENZANCE**, where users are able to **PLAN THEIR OUT OF SEASON ADVENTURE** with **OFF-THE-SHELF ITINERARIES** and the **TAILORED BUILD YOUR OWN ITINERARY FUNCTIONALITY**.

This platform creatively presents all the activity and itineraries created in T2.2.2 T2.2.4. The in-depth treatment of the individual experiences mentioned in T2.2.2 facilitated and fuels this functionality on the website. There has been nearly **15,000 VIEWS TO THE LOVE PENZANCE MICRO- WEBSITE SINCE NOV 22**, with it being **THE BEST PERFORMING LANDING PAGE ON THE ENTIRE WEBSITE IN 2023** (Jan - Mar).

WPT4

OUTCOMES

1x coherent and integrated low season marketing campaign delivered, resulting in a combined reach of **over 62million**, specifically social media reach of **1.18 million** (organic and paid reach), **PR reach of 59.7million** with coverage across a number of national newspapers and **1.2million YouTube impressions** of our promotional video. All activity was designed to drive traffic to itinerary builder website on LovePenzance, resulting in nearly **15,000 views of direct traffic to itineraries and low season content** on the micro website (since Nov 22).

According to The Southwest Research Company Economic evaluation report (see WPT5), over the project period it is estimated that in excess of **105,000 additional off-peak trips** have been made to West Cornwall generating approximately **£13.3m additional visitor spend** providing a value of **£126.65 per additional trip**. Based upon 2021 employment costs the additional spend generated through the project **supports approximately 257 FTE jobs**. The marketing activity contributed to these outcomes.



Acorn Penzance © Mike Newman



LESSONS LEARNED

What went well

- ✔ The marketing campaign provided a refreshed approach to destination marketing for the West Cornwall area and provided an integrated approach that all SMEs on the experience database could collaborate and benefit from. From support on content creation, photography, inclusion in press trips or on social media, its design worked well to compliment the business community whilst attracting the right type of visitors during the low season.
- ✔ Strategic partnerships with key organisations such as Visit Cornwall and LovePenzance were vital to the successfully delivery of a combined marketing campaign. Working together, for a combined greater good, enabled resources and expertise to be pooled and deliver the maximum results.
- ✔ Integrating all elements of marketing and ensuring coherency at all times. Collating feedback from businesses as part of the WPT1 business engagement, combining with visitor research collated from WPT5 informed the direction of the marketing strategy and provided the confidence the campaign had a receptive audience. This worked well and enabled us to continually review/incorporate into our marketing deliverables.
- ✔ Creating a strong tone of voice from the outset provided strong foundations for the marketing campaign to start from. Understanding that the itineraries and experiences must all be conveyed in a consistent tone of voice and style, feeding into one central creative campaign theme, provided structure to all resulting marketing outputs.

What we would do differently

- 💡 Starting the marketing activity earlier, so there would be a soft marketing launch in 2021-22, but this proved too difficult to do until business training was complete, which takes time to get right.

CASE STUDY

Collaboration alleviates your low season marketing appeal



Richard James is business development manager at Jubilee Pool

WHAT WE DO:

Jubilee Pool is the largest and most celebrated outdoor sea water pool in the UK and is iconic to Penzance's seafront. Opened in the 1930s, the triangular art deco seawater pool has provided a bracing swim to holidaymakers and Cornish residents alike for many years. 2020 saw Jubilee Pool launch a geothermal pool – a UK first, offering you the chance to bathe in natural salt water heated to 35 degrees by their own hot water well. Enabling the pool to be accessible to additional audiences year-round.

Onsite, there is a café, serving locally sourced food and drink with unrivalled views across Mount's Bay.

HOW WE DO IT:

For us, our low season audience differs from our peak season audience, and our offer must reflect this to ensure we are appealing to the different audiences throughout the seasons. As an outdoor activity provider, we must adapt our marketing messaging to reflect this.



THE EXPERIENCE PROJECT HAS HIGHLIGHTED THE BENEFITS OF COLLABORATING *with other organisations to help create specific low season offers*

To support in the extension of our seasonal offer, we have to consider creative ways of packaging different experiences.

The EXPERIENCE project has highlighted the benefits of collaborating with other organisations to help create specific low season offers, which will help us to appeal to new and broader audiences.

For example, we were involved in a press trip with Cycling UK and Cornwall Council, where we hosted a group of journalists experiencing Kernow West Way trail. This opened marketing opportunities to a new cycling audience and set the wheels in motion for other ideas of business collaborations for the future including cultural collaborations.

OUR TIP:

Our key tip is to identify like-minded collaborators, as it will help alleviate the marketing pitch. We have some exciting plans for new low season offers, but it takes time to create new experiences.



Jubilee Pool © Mike Newman

WPT5

DELIVERING LASTING BENEFIT FOR ECONOMY, ENVIRONMENT AND SOCIETY

By redistributing visitors to the low season, our strategy aimed to deliver lasting benefit for the economy, the environment and the local resident community. We wanted to leave a positive impact for the local community and visitors alike. Using sustainable cultural tourism as the key driver enabled us to encourage a new perspective of the area and leave a positive impact. The creation of a cultural landmark particularly helped to encourage a change as it took a natural asset, protected it all whilst driving economic gain for surrounding businesses.

Working with The South West Research Company at the outset (from 2021), we monitored the project's impact on a six monthly basis from the baseline year (2019) across the three main areas – economy, environment and society. The South West Research Company also deliver Visit Cornwall's visitor surveying and value for tourism reports (using the Cambridge Economic Model), so this alliance, strategically enabled a comparison between both data sets.

Background of tourism in West Cornwall, before the start of the project

The South West Research Company economic and environmental impact report (see appendix xxx for full report), which was conducted on behalf of the Experience West Cornwall project, highlighted that tourism in the West Cornwall area was performing well prior to covid in the baseline year (2019), but there was a clear skew to peak season visits.

In 2019 baselevel year, it is estimated there was:

- 102,000 OFF-PEAK STAYING VISITORS IN WEST CORNWALL AUDI
- 428,000 OFF-PEAK DAY VISITORS IN WEST CORNWALL
- 530,00 OFF-PEAK TOTAL VISITORS (DAY + STAYING) IN WEST CORNWALL
- £38.8M OFF-PEAK VISITOR SPEND WITH THE LARGEST PROPORTION OF SPEND IN FOOD & DRINK/ACCOMMODATION
- £53.5M OFF-PEAK BUSINESS TURNOVER
- 752 OFF-PEAK FTE EMPLOYMENT SUPPORTED

To see the full facts and figures before the start of the project, please see economic and environment evaluation report below and subsequent appendixes. The report graphs highlight the baseline year (2019), but its progression throughout the project intervention and how new revenue associated with the project supported local businesses and created year-round jobs.

Types and number of designed activities in off-peak season

We curated 138x activities, plus 1x star experience/infrastructure upgrade (see WPT2 + T3 for detailed information). Please see some select examples opposite.

Types and number of registered and participant businesses in the project

201 local organisations registered with the network and includes a wide range of actors from local micro-SMEs to large organisations such as the National Trust.

Benchmark indicators

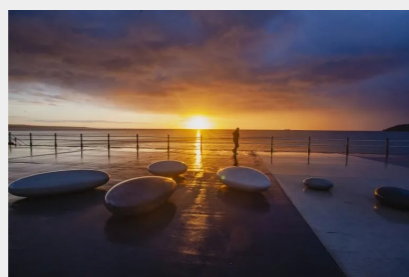
Over the project period it is estimated than in excess of **105,000 ADDITIONAL OFF-PEAK TRIPS HAVE BEEN MADE TO WEST CORNWALL GENERATING APPROXIMATELY £13.3M ADDITIONAL VISITOR SPEND** providing a value of £126.65 per additional trip. Based upon 2021 employment costs the additional spend generated through the project **SUPPORTS APPROXIMATELY 257 FTE JOBS.**

It is estimated that the **EXPERIENCE funded infrastructure attracted 332,000 people to walk it during 2021 -22 and a further 8,000 cyclists.**



NEWLYN SCHOOL OF ART A CALENDAR OF CLASSES

Explore a new medium or perfect your painting skills with a short course at the Newlyn School of Art. Whether you're beginning with brushes or want to explore experimental painting, there's a class for every skill level. Courses in February 2023 included Painting with Oils, Contemporary Landscapes and Abstract Figure Painting. Most courses span 3-4 days and include all the paints and materials you'll need. You'll find a calendar of classes on their website.



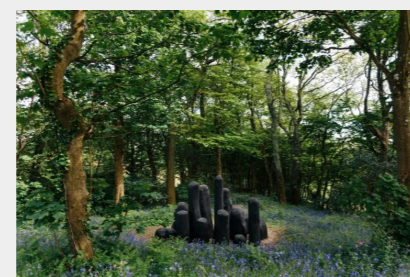
PENZANCE TO NEWLYN WALK THE PROMENADE

Penzance Promenade is a beautiful open stretch of newly refurbished seafront. Penzance prom has been designed for all travellers to enjoy, be it on foot or by bike. Feel free to stop off and read some of the information boards, which tell you about the wildlife and history of the area. Don't forget to pop into Jelbert's to experience their popular clotted cream-topped ice cream.



MORRAB LIBRARY TOUR FASCINATING LIBRARY

The Morrab Library can be found in the subtropical Morrab Gardens in Penzance. It was founded in 1818 and is one of only (approximately) 50 independent libraries in the UK. If you're around on a Friday, there is a free library tour at 2pm, which explores the nooks and crannies of this iconic house. Find out more here.



TREMENHEERE SCULPTURE GARDENS SPRING AWAKENING

See Tremenheere Sculpture Gardens as it bursts back into life after winter. There are installations from renowned artists around every corner – from intriguing metal sculptures to the fascinating camera obscura. It's the perfect place to enjoy a mindful moment, experience the changing seasons and enjoy the details of nature.



LEE STEVENSON INTRO TO RELIEF PRINTMAKING

Relief printmaking is the art of carving designs into printing blocks, then pressing them onto paper to create beautiful (and often colourful) prints. Spend the day learning the technique from talented printmaker Lee Stevenson. Lee welcomes you into his studio in Longrock for an inspiring workshop, during which you'll create amazing prints to take home. Find out more here.



ARTS TRAIL IN MARAZION GWELLEN

If you've ever visited Mount's Bay, home of St Michael's Mount, it might surprise you to learn that beneath the waves lies the remains of an ancient forest. To bring this secret landscape to life, local artist Emma Smith has created a site-specific artwork, 'Gwelen'. To find her wooden 'seeing sticks', join the section of the South West Coast Path that connects Marazion and Penzance. This unique installation is accompanied by a podcast, which will introduce you to Emma Smith and her work.



ECONOMIC PERFORMANCE EVALUATION



EXECUTIVE SUMMARY

Based on the South West Research Company economic report which was conducted on behalf of the Experience West Cornwall project:

Over the project period it is estimated that in excess of **105,000 additional off-peak trips** have been made to West Cornwall generating approximately **£13.3m additional visitor spend** providing a value of **£126.65 per additional trip**.



Based upon 2021 employment costs the additional spend generated through the project supports approximately **257 FTE JOBS**.

Key findings are as follows:

- West Cornwall attracted **A HIGHER PROPORTION OF STAYING VISITORS** and a lower proportion of day visitors than the remainder of the county in both the peak and off-peak periods in each of the project years.
- Off peak staying visitor levels in West Cornwall **IN 2022 WERE ESTIMATED AT THEIR HIGHEST LEVEL SINCE THE BASELINE YEAR OF 2019** (107,000 trips in 2022 compared to 102,000 in 2019).
- **OFF PEAK DAY VISITS IN 2022 WERE SIMILAR TO THE BASELINE YEAR** (427,000 in 2022 and 428,000 in 2019).

- Overall, off peak visitors to West Cornwall (day and staying) were very slightly up compared to the baseline year (534,000 in 2022 and 530,000 in 2019).
- In 2021 and 2022, when the majority of project activity was taking place, there is a clear difference estimated in the performance of West Cornwall during the off-peak period compared to the rest of the county. It is estimated that in 2021 26% of trips to West Cornwall were off peak (21% rest of Cornwall) and 39% of trips in 2022 were off peak, which was again higher than the rest of the county (38%).
- Year on year growth is evident for off peak visits in terms of visits to the area, the areas visited, and activities undertaken in the Mounts Bay part of the project area.
- Off peak visitor spend in 2022 (£39.6m) was higher than the base year of 2019 (£38.8m), with the largest proportions of spend falling in the food and drink and accommodation sectors.
- Off peak business turnover in 2022 (£55.6m) was higher than the base year of 2019 (£53.5m).

DATA AND ANALYSIS

The following graphs have been extracted from The South West Research Company economic impact report. All figures contained within this report are derived from a combination of data from visitor surveys conducted as part of the Experience Project which have been used alongside annual volume and value data held for Cornwall, the former Penwith area and St Ives.

The graphs highlight the baseline year (2019), but its progression throughout the project intervention and how new revenue associated with the project supported local businesses and created year-round jobs. It also looks at how the new funded infrastructure and activities have benefitted both visitors and the local community. It breaks down the data from the base year (2019) and monitors/tracks performance throughout the EXPERIENCE project intervention and the resulting impact on figures, comparatively looking at wider Cornwall.

The report provides details of two areas for comparison and evaluation purposes:

- **WEST CORNWALL** – This area covers the former Penwith local authority area of West Cornwall but excludes St Ives and is the recognized target area for this project.
- **CORNWALL EXCLUDING WEST CORNWALL** – This area is the remainder of the county excluding the West Cornwall area defined above.

It has been conducted on a 6 monthly basis.



In 2022 it is estimated there was:

 **107,000 OFF-PEAK** staying visitors in West Cornwall + **427,000 OFF-PEAK** day visitors in West Cornwall 

= **534,000 OFF-PEAK** total visitors (day + staying) in West Cornwall

 **£39.6M OFF-PEAK** visitor spend with the largest proportion of spend in food & drink/accommodation

 **796 OFF-PEAK** FTE employment supported

600 OR MORE accommodation and attraction businesses in West Cornwall

Volume of visitors

This report details visitor numbers in the West Cornwall area with further breakdowns provided for the remainder of the county for comparison purposes. Further analysis is provided for the peak and off peak periods, with the latter period being the area of focus for the Experience Project.

In 2022, the visitor spend generated in the West Cornwall area supported approximately 3,000 FTE jobs with some of these in the 600 or more accommodation and attraction businesses in the area.

In a similar manner to the rest of the county, visitors to West Cornwall tend to be loyal visitors with the large majority being repeat visitors for a considerable period. The table below shows the breakdown of first time and repeat visitors collected through the project visitor surveys.

VISITOR TYPE	2022 OFF PEAK	2022 PEAK	2012 OFF PEAK	2021 PEAK
First time visitors	2%	4%	2%	3%
Repeat visitors	98%	96%	98%	97%

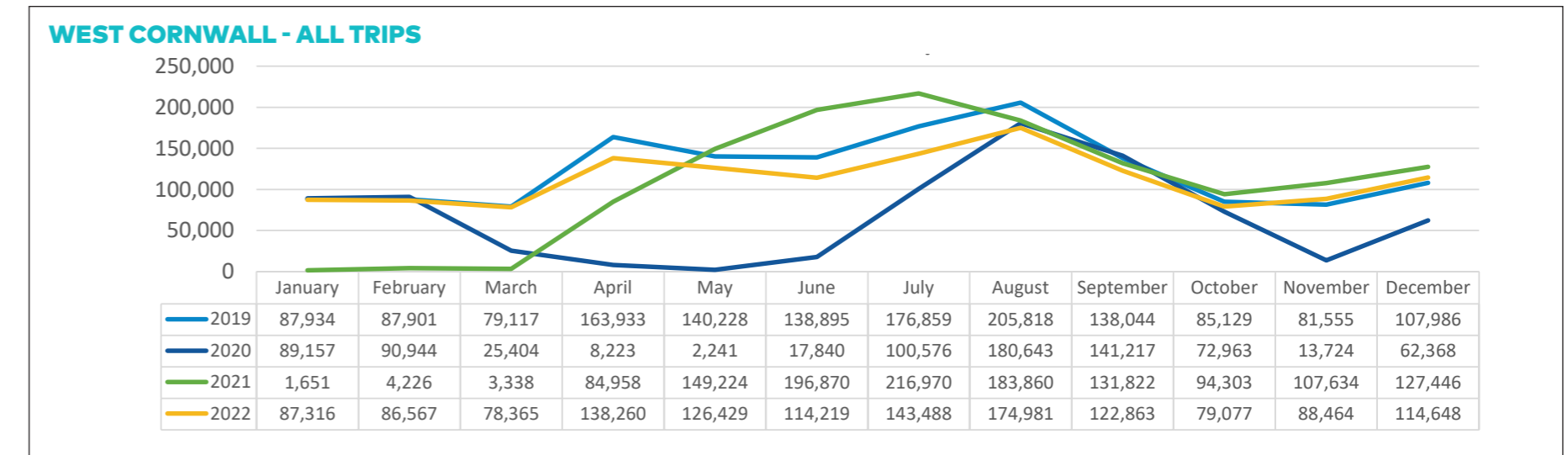
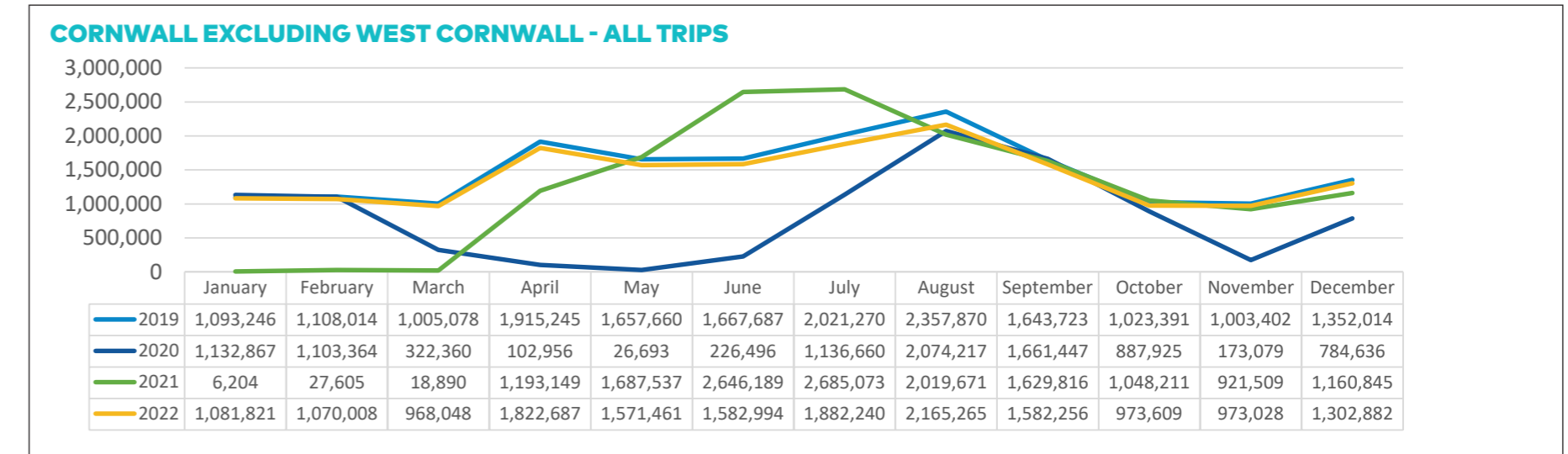
During the project period, around a third of visitors to the county tend to come from the county itself or the wider South West region with the remaining two thirds coming from the rest of the UK. Due to the travel restrictions in place because of Covid there have been very few leisure/holiday trips to the county from overseas visitors, although recovery is now underway, and very few overseas visitors were collected in the project visitor surveys as shown below.

VISITOR ORIGIN	2022 OFF PEAK	2022 PEAK	2012 OFF PEAK	2021 PEAK
Cornwall	9%	10%	9%	8%
Other South West	29%	25%	29%	23%
Other UK	58%	64%	58%	69%
Overseas	-	1%	-	-



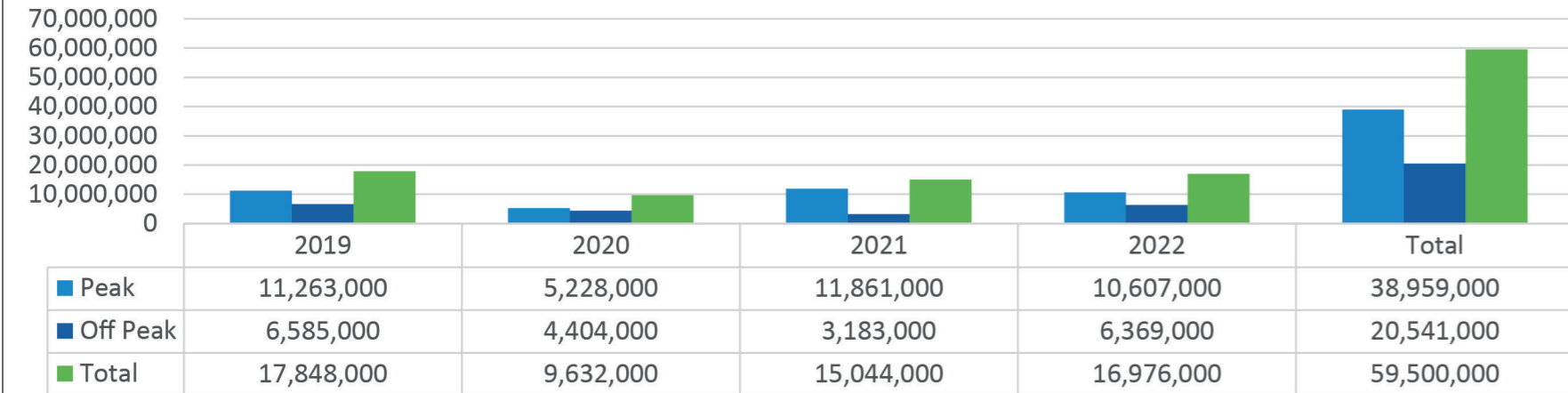
All trips by area, year, period and month

All trips to West Cornwall and the rest of Cornwall are displayed below split by the estimated month of trip in each year across the project period (2019-2022)

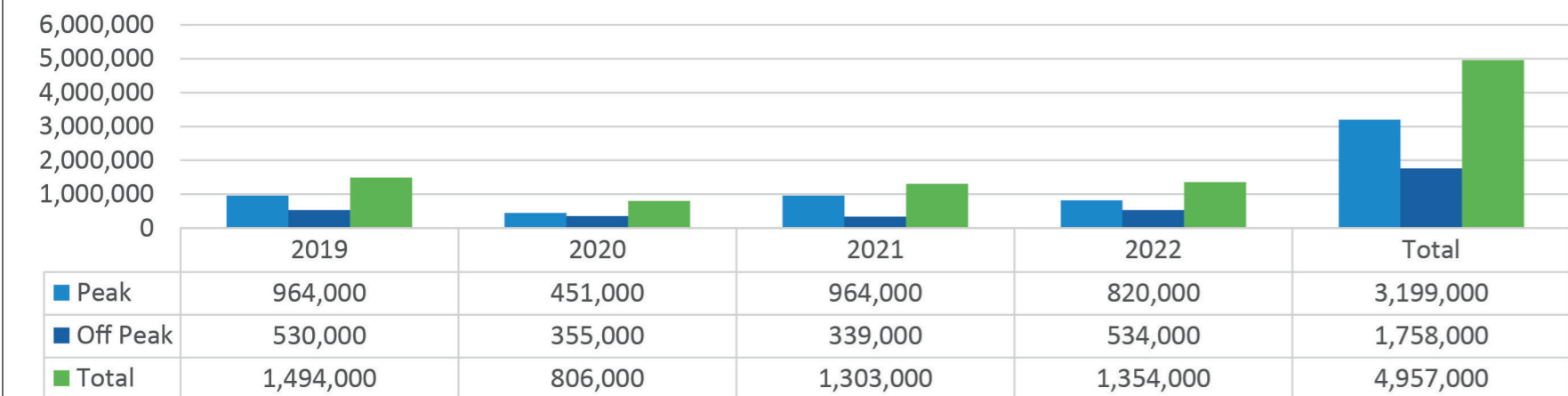


All trips by area, year and period

CORNWALL EXCLUDING WEST CORNWALL - ALL TRIPS



WEST CORNWALL - ALL TRIPS



When day and staying visits are combined West Cornwall attracted 964,000 peak and 530,000 off peak visitors in comparison to approximately 11.3 million peak and 6.6 million off peak visitors in the rest of the county. 2020 and 2021 were both heavily influenced by covid restrictions. Compared to 2019, 2022 saw overall visitor levels in both areas slightly down. However, off peak visitors in West Cornwall were very slightly up compared to the baseline year (534,000 in 2022 and 530,000 in 2019).

Visitor trips and activities in the Mounts Bay area

Part of the West Cornwall project area of particular importance was the Mounts Bay area consisting of the area around Mousehole, Newlyn, Penzance and Marazion. The visitor surveys captured details of visits to this area which has been applied to the visitor numbers calculated to demonstrate visitor activity.

VISITS TO MOUNTS BAY	2022 ALL	2022 PEAK	2022 OFF PEAK	2021 ALL	2021 PEAK	2021 OFF PEAK
Staying in Mounts Bay	78,000	48,000	30,000	90,000	66,000	23,000
Day visitor	897,000	547,000	350,000	809,000	598,000	210,000
Totals	975,000	595,000	380,000	899,000	665,000	234,000

AREAS VISITED IN MOUNTS BAY	2022 OFF PEAK	2021 OFF PEAK
Penzance	266,000	168,000
Marazion	213,000	140,000
Mousehole	164,000	112,000
St Michaels Mount	167,000	100,000
Newlyn	141,000	91,000
Other	30,000	21,000

ACTIVITIES IN MOUNTS BAY	2022 OFF PEAK	2021 OFF PEAK
Eating & drinking	339,000	168,000
Visiting the beach/sea	316,000	140,000
Visiting local attractions/ places of interest	323,000	112,000
Walking/cycling	262,000	100,000
Shopping	255,000	91,000
History/heritage bases activities	224,000	21,000
Arts/cultural based activities	118,000	84,000
Swimming	107,000	26,000
Water based activities e.g. sailing/ surfing/windsurfing/kayaking/SUP	42,000	18,000
Attending a festival/event	42,000	16,000

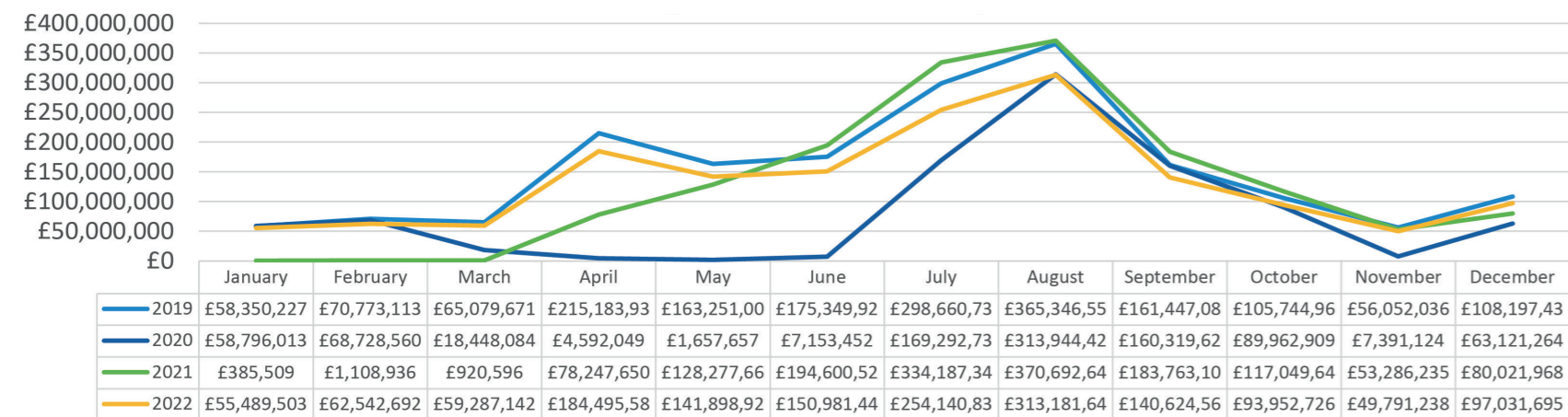
Year on year growth is evident for off peak visits in terms of visits to the area, the areas visited and activities undertaken.

Of those walking and cycling in the Mounts Bay area it is estimated that 127,000 walked the coastal path in 2021 rising to 205,000 in 2022 with 3,000 cycling on the path in 2021 rising to 5,000 in 2022.

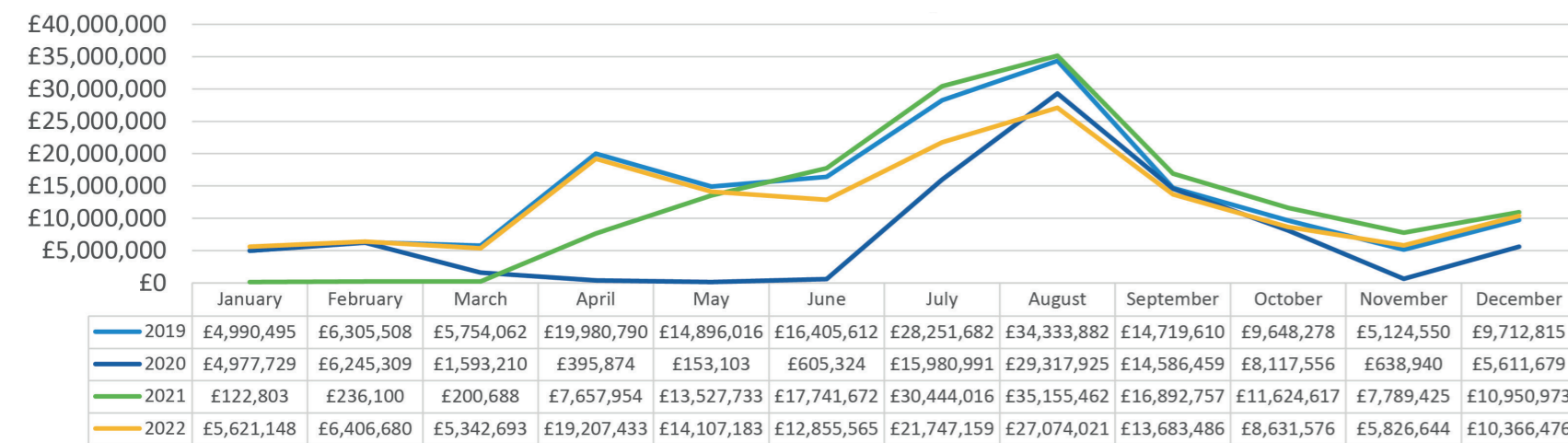
Spending

All spend by area, year, period and month

CORNWALL EXCLUDING WEST CORNWALL - ALL TRIPS



WEST CORNWALL - ALL TRIPS



West Cornwall distribution of spend by period and sector

Focussing on the project area of West Cornwall the table below shows the estimated visitor spend spent by sector in each period of each year calculated through the Cambridge Model. Adjustments have been made to original direct visitor spend figures to recognise that some spending on retail and food and drink will fall within attractions or accommodation establishments and it is also assumed that 40% of travel spend will take place at the origin of the trip rather than at the destination.

Off peak visitor spend in 2022 (£39.6m) was higher than the base year of 2019 (£38.8m), with the largest proportions of spend falling in the food and drink and accommodation sectors.

ALL SPEND	2022 PEAK	2022 OFF PEAK	2021 PEAK	2021 OFF PEAK	2020 PEAK	2020 OFF PEAK	2019 PEAK	2019 OFF PEAK	TOTAL PEAK	TOTAL OFF PEAK	TOTAL SPEND
Accommodation	£39,144,000	£10,421,000	£42,588,000	£7,644,000	£22,448,000	£6,425,000	£42,690,000	£9,020,000	£148,870,000	£33,510,000	£180,380,000
Retail	£16,111,000	£7,578,000	£18,297,000	£5,552,000	£9,003,000	£5,343,000	£20,918,000	£8,525,000	£64,329,000	£26,998,000	£91,327,000
Food and drink	£29,197,000	£14,115,000	£33,324,000	£10,340,000	£14,807,000	£8,487,000	£31,097,000	£12,818,000	£108,425,000	£45,760,000	£154,185,000
Attraction/entertainment	£10,788,000	£3,517,000	£12,094,000	£5,577,000	£6,872,000	£2,591,000	£16,092,000	£4,226,000	£45,846,000	£12,911,000	£58,757,000
Transport	£8,061,000	£3,939,000	£9,070,000	£2,887,000	£4,745,000	£2,603,000	£10,674,000	£4,167,000	£32,550,000	£13,596,000	£46,146,000
Total direct	£103,301,000	£39,570,000	£115,373,000	£29,000,000	£57,875,000	£25,449,000	£121,471,000	£38,756,000	£398,020,000	£132,775,000	£530,795,000

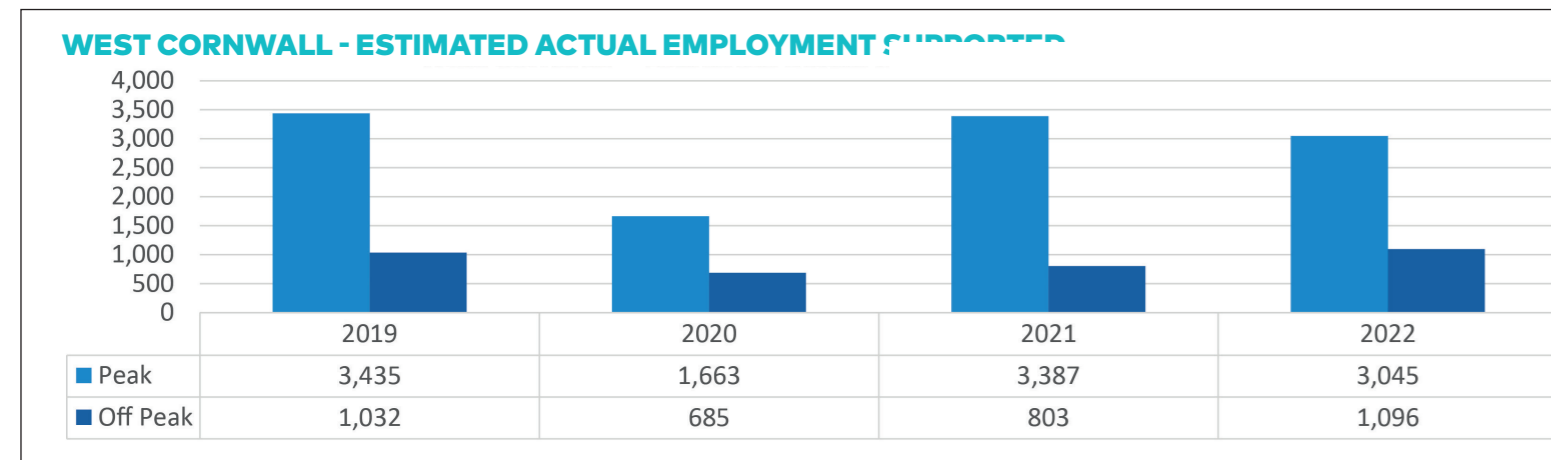
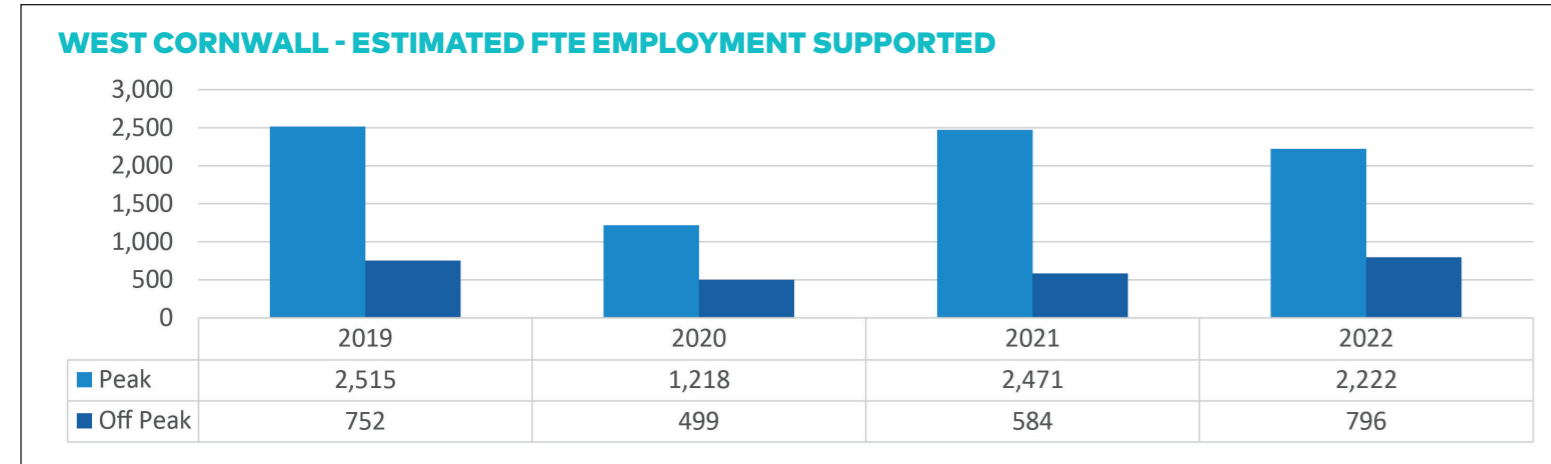
The table below shows the estimated amount of business turnover generated by the above visitor spend spent by sector in each period of each year. The total business turnover includes direct visitor spend impacts as well as indirect and induced impacts (business turnover arises as a result of tourist spending (direct), from the purchase of supplies and services locally by businesses in receipt of visitor spending (indirect) and as a result of the spending of wages in businesses by employees whose jobs are directly or indirectly supported by tourism spending (induced)).

Off peak business turnover in 2022 (£55.6m) was higher than the base year of 2019 (£53.5m).

BUSINESS TURNOVER	2022 PEAK	2022 OFF PEAK	2021 PEAK	2021 OFF PEAK	2020 PEAK	2020 OFF PEAK	2019 PEAK	2019 OFF PEAK	TOTAL PEAK	TOTAL OFF PEAK	TOTAL SPEND
Direct	£103,301,000	£39,570,000	£151,373,000	£29,000,000	£57,875,000	£25,449,000	£121,471,000	£38,756,000	£398,020,000	£132,775,000	£530,795,000
Indirect/induced	£46,325,000	£16,013,000	£51,367,000	£11,738,000	£25,528,000	£9,926,000	£51,761,000	£14,767,000	£174,981,000	£52,444,000	£227,425,000
Total	£149,626,000	£55,583,000	£166,740,000	£40,738,000	£83,403,000	£35,375,000	£173,232,000	£53,523,000	£573,001,000	£185,219,000	£758,220,000

Employment

West Cornwall employment supported by year and period



Shown above are the numbers of Full Time Equivalent (FTE) jobs supported by the business turnover generated and the estimated actual numbers of jobs that equates to for West Cornwall by year and period. It should be noted that 2020 and 2021 figures are Covid impacted and many more jobs not captured through the modelling process will have been supported by Government schemes in place such as the furlough scheme.

In 2022 the number of FTE jobs supported by off peak visitor spend was higher than the base year of 2019 (796 and 752 FTEs respectively).

Volume of visitors forecast for the next 5 years

West Cornwall forecast notes

This section provides an estimate of what is likely to happen to visitor volume and value in West Cornwall over the period of 2022 to 2028. An overview of the process used to reach the forecast estimates in previous years is provided overleaf and this is the method used to estimate domestic tourism activity (UK staying and day visits) between 2023 and 2027.

For domestic tourism activity in 2022 business performance data gathered by TSWRC across the year has been used to estimate mid range full year figures for the county.

For overseas visitors the VisitBritain national forecasts for 2022 have been used which estimate that visitor trips will be 65% of 2019 levels and spend 76% of 2019 levels. As the overseas data collection continues to get back towards normal in 2022 and the fact that there is still an everchanging picture with regards to overseas travel, the forecasts for 2023-2027 should still be viewed more as possible scenarios rather than forecasts. The assumptions made for 2023 were spend at 90% of 2019 and trips at 76% of 2019, with the normality returning from 2024 and the usual forecasting method applied as described below.

Please also note that the decreases in employment levels for 2020 and 2021 are unlikely to be actual change. The model estimates employment supported by visitor expenditure in a year and many more jobs not captured through the modelling process would have been supported by the Government schemes in place e.g. furlough scheme.

WEST CORNWALL FORECASTING (METHOD FOR 2023-2027)

The forecast figures are based solely upon West Cornwall's historical performance and do not attempt to build in data on future consumer spending, exchange rates etc. Upper, Mid and Lower range forecasts were calculated for each year with mid-range forecast estimates be used for this report (upper and lower estimates could be used in the future to account for any changes in things such as consumer spending, exchange rates and the weather which may produce an unexpected swing in visitor volume and expenditure in any given year).

The forecast data for West Cornwall has been calculated using three year average data for each measure (trips, nights and spend) removing any unusually high or low figures from the data which may have occurred largely by chance or which may be as a result of sample sizes at a local authority level and increased margins of error.

The average data has then be used to establish upper, mid and lower estimates from which forecast ratios have been calculated which have been used to establish upper and lower 2022 estimates, which are also influenced by 2022 performance data available at the time of writing this report. Future years have then been calculated using the ratio between 2022 and the latest years' data assumed to be reliable at the mid-range, with upper and lower estimates based upon the mid-range estimate and the differentials established between the ranges based upon the historical data.

The forecasts assume similar yearly growth across the forecast period at the mid-range and allow the opportunity to update and revise as further years data becomes available.

WEST CORNWALL ANNUAL FORECAST 2023 TO 2028

WEST CORNWALL MID RANGE FORECASTS	2019	2020	2021	2022	2023	2024	2025	2026	2027	2028
Staying trips	452,600	219,700	387,700	373,726	463,383	481,006	488,716	496,551	504,514	512,607
Staying spend	£134,171,000	£68,064,000	£119,475,000	£118,446,755	£132,434,944	£136,340,466	£139,206,549	£142,135,444	£145,128,604	£148,187,517
Day trips	1,040,800	585,600	914,600	980,954	1,046,055	1,052,984	1,059,960	1,066,981	1,074,050	1,081,165
Day trip spend	£35,951,000	£20,160,000	£32,868,000	£32,423,308	£36,929,913	£38,058,866	£39,222,332	£40,421,366	£41,657,054	£42,930,517
Total trips	1,493,400	805,300	1,302,300	1,354,680	1,509,437	1,533,991	1,548,676	1,563,533	1,578,564	1,593,772
Annual charge %		-46.1%	61.7%	4.0%	11.4%	1.6%	1.0%	1.0%	1.0%	1.0%
Total visitor spend	£170,122,000	£88,224,000	£152,343,000	£150,870,063	£169,364,856	£174,399,332	£178,428,881	£182,556,810	£186,785,658	£191,118,034
Annual charge %		-48.1%	72.7%	-1.0%	12.3%	3.0%	2.3%	2.3%	2.3%	2.3%
FTE employment supported	3,289	1,709	3,031	2,913	3,232	3,290	3,327	3,365	3,403	3,442
Annual charge %		-48.0%	77.4%	-3.9%	11.0%	1.8%	1.1%	1.1%	1.1%	1.1%
Off peak trips	529,622	354,560	338,598	534,439	595,493	605,179	610,973	616,834	622,764	628,764
Annual charge %		-33.1%	-4.5%	57.8%	11.4%	1.6%	1.0%	1.0%	1.0%	1.0%
% of all trips	35.5%	44.0%	26.0%	39.5%	39.5%	39.5%	39.5%	39.5%	39.5%	39.5%
Off peak spend	£41,535,708	£27,184,424	£30,924,605	£42,195,217	£47,367,826	£48,775,864	£49,902,845	£51,057,341	£52,240,061	£53,451,737
Annual charge %		-34.6%	13.8%	36.4%	12.3%	3.0%	2.3%	2.3%	2.3%	2.3%
% of all spend	24.4%	30.8%	20.3%	28.0%	28.0%	28.0%	28.0%	28.0%	28.0%	28.0%

Based upon the available data at the time of compiling this report it is anticipated that total tourism spend in 2022 will decrease by approximately 1% compared to 2021. Further year on year increases are estimated for all following years compared to each previous year (2023 =12%, 2024 =3% and increases of approximately 2% per annum thereafter). The proportion of off peak trips and spend are estimated to follow a similar pattern to trips overall with West Cornwall off peak spend increasing from £42.2m in 2022 to £55.5m in 2028.

WPT5

CASE STUDY

We are capitalising on the increased use of the Mount's Bay Coast Path and keeping our business open during the low season



Angus Tobey is the proud owner of the Hoxton Special

WHAT WE DO:

The Hoxton Special is a water sports school and café located in Marazion, on the Mount's Bay Coast Path. From this converted lifeguard hut, we offer kitesurfing lessons, paddleboarding and kayak hire. We also serve drink and food in our café right on the beach. For the first time this year, we will be open January – March.

HOW WE DO IT:

October until December is a good time to kitesurf, so our business is usually open until Christmas and then as the quieter months kick-in we close until April. This year, for the first time, we are planning to remain open 5 days/week through winter.

Although the demand for water sports is lower in January – March, we are confident the increased use of the newly renovated coastal path will bring more trade to the café. Since the Mount's Bay Coast Path has been upgraded, we have seen more cyclists and walkers as well as a rise in awareness of our business, with more customers noticing it and coming for a drink, bite to eat or to find out about our water sports offer. We are hoping to make the most of this by keeping our doors open.

Our location is very exposed, and the weather here can be quite spectacular. Influenced by the Nordic tradition of Hygge, we will be swapping the summer surf styling of the hut for a cosy warm interior, with rugs and a cast-iron burner, offering customers a welcoming warm retreat from the surrounding elements. We will also be adapting our food & drink offer, taking inspiration from Fika, the Swedish tradition of stopping to drink coffee and eat cake.



OUR TIP:

Don't stick to your usual business model. Look at the opportunities around you, be brave and think about the small changes that might help overcome some of the barriers to staying open though the low season.



ENVIRONMENTAL PERFORMANCE EVALUATION



EXECUTIVE SUMMARY

The key findings from the South West Research Company environment report (conducted in behalf of experience) are as follows:



AMOUNT OF KG CO2 PRODUCED PER POUND SPENT for all visitor types in the off peak period of 2022 **WAS LOWER** than the off peak period in 2021

In 2022 the kg of CO2 produced per visitor in the off peak period was much lower than the comparative figure for the peak period **(24.33 AND 32.54 KG CO2 PER VISITOR RESPECTIVELY).**

The amount of kg CO2 produced per visitor for all visitor types in the off peak period of 2022 was **LOWER THAN THE OFF PEAK PERIOD IN 2021**

The data estimates that in 2021 the outputs of kg CO2 per visitor for all visitors were broadly **SIMILAR IN BOTH THE PEAK AND THE OFF PEAK PERIODS**

DAY VISITORS PRODUCED MORE KG OF CO2 PER POUND SPENT than staying visitors across both years and all periods

PEAK PERIODS IN BOTH 2021 AND 2022 GENERATED MORE CO2 OUTPUTS IN TOTAL than their comparative off peak period

When the outputs are analysed by the kg of CO2 per visitor type, in each case **STAYING VISITORS GENERATED MORE PER VISITOR THAN DAY VISITORS.**

The data estimates that in 2021 the outputs of kg CO2 per visitor for all visitors were broadly **SIMILAR IN BOTH THE PEAK AND THE OFF PEAK PERIODS**

In both years analysed and for all periods the **LARGE MAJORITY OF VISITORS ARRIVED BY CAR** likely to be petrol or diesel, with staying visitors having travelled further on average than day visitors

THE LARGEST AMOUNT OF CO2 GENERATED ACROSS ALL PERIODS AND YEARS WAS BY VISITORS USING SELF CATERING ACCOMMODATION due to this accommodation type consistently being the most popular amongst visitors

DATA AND ANALYSIS

The following graphs have been extracted from The South West Research Company environmental impact report, which was conducted on behalf of the Experience West Cornwall project. It contains the key findings relating to the environmental impacts associated with visits in the peak and off peak periods in West Cornwall (this area covers the former Penwith local authority area of West Cornwall but excludes St Ives and is the recognized target area for this project).

All figures contained within the report are derived from a combination of data from visitor surveys conducted as part of the Experience Project which have been used alongside annual volume and value data held for Cornwall, the former Penwith area and St Ives which are shown in detail in the Economic Impact report for this project. Data is available for 2021 and 2022 for the environmental aspect of the project.

Data has been sourced online to calculate that carbon impacts estimated in this chapter. The data is kindly provided by the organization Our World In Data.



Beryl Bikes © Mike Newman

Contributory factors which should be considered when reading the results in this report;

- **THE CAR** remains the number one mode of transport used for the large majority of visits to West Cornwall and Cornwall **(93% FOR WEST CORNWALL IN 2022).**
- **WEST CORNWALL** is the furthest point in Cornwall to reach, making the use of private transport more attractive.
- **WHILST THERE IS A TRAIN ROUTE INTO WEST CORNWALL** this is still only chosen by 3% of visitors to the area according to latest survey data.
- **THE NUMBERS OF PEOPLE TRAVELLING ON PUBLIC TRANSPORT REDUCED MASSIVELY DURING THE COVID PANDEMIC**, which was evident across a large proportion of this project and would have reduced the attractiveness of the train further as people were reluctant to mix.
- **THE USE OF PUBLIC TRANSPORT TO REACH CORNWALL** means that you are also reliant on public transport to travel around the county which undoubtedly makes this option less attractive to some visitors.
- **WEST CORNWALL ALSO ATTRACTS AIR TRAFFIC** and day visits in and out of the Isles of Scilly.

METHODOLOGY

This report contains the key findings relating to the environmental impacts associated with visits in the peak and off peak periods in West Cornwall (this area covers the former Penwith local authority area of West Cornwall but excludes St Ives and is the recognized target area for this project).

Initially, it was intended that there would be an environmental impact tool made available for all project partners but unfortunately this wasn't provided in the end. As such, we have sourced data online to calculate the carbon impacts estimated in this chapter. The data is kindly provided by the organization Our World In Data, a brief description of their aims taken from their website is:

“The goal of our work is to make the knowledge on the big problems accessible and understandable. Our World in Data’s mission is to publish the “research and data to make progress against the world’s largest problems”.”

The organisation have published details of the carbon footprint of travel per kilometer by a range of different transport types, which have been used/ adapted for the impacts shown in this chapter ([Carbon footprint of travel per kilometer, 2018 \(ourworldindata.org\)](#)). The specific modes of transport utilised are shown in the table below.

Whilst there were a number of available options to use online for this process, many were models where a figure was input to produce an output without details of the calculations used. The use of the data provided by Our World In Data allows for a clear and transparent method to be applied for this aspect of the project, suitable for use by other partners and comparison across the project. As such this was the obvious choice for the source data to be applied to the project survey data.

MODE OF TRANSPORT	GHG EMISSIONS (GCO2E/KM)
Bus	104.71
Coach	27.79
Medium car (diesel)	170.61
Medium car (hybrid)	108.95
Medium car (petrol)	192.28
National rail	41.15
Short haul flight (average of business and economy class)	194.66

Estimates are also provided in this report split by the accommodation type used, however, it should be noted that these estimates are based upon the data calculated through the mode of transport data and distance travelled to the destination rather than representing a detailed analysis of the impacts associated with the accommodation itself.

Comparison of transport environmental impacts by year and period

The tables below summarise the key environmental impacts associated with trips made in the listed transport types by year and period of travel (further details on these outputs and the calculations used are contained in the pages that follow).

Unsurprisingly, the peak periods in both years generated more CO2 outputs in total than their comparative off peak period. When the outputs are analysed by the kg of CO2 per visitor type, in each case staying visitors generated more per visitor than day visitors. The data also estimates that in 2021 the outputs of kg CO2 per visitor for all visitors were broadly similar in both the peak and the off peak periods, however, in 2022 the kg of CO2 produced per visitor in the off peak period was much lower than the comparative figure for the peak period (24.33 and 32.54 kg CO2 per visitor respectively).

The amount of kg CO2 produced per visitor for all visitor types in the off peak period of 2022 was lower than the off peak period in 2021.

PEAK PERIOD 2021	CAR/VAN ETC.	BUS/COACH	ORGANISED COACH	PLANE/AIR	TRAIN	TOTAL
All visitors - Tons (metric) CO2	34,119	175	33	278	302	34,907
kg CO2 per day visitor	33.45	13.42	11.18	0.00	5.13	32.17
kg CO2 per staying visitor	47.53	10.51	0.00	93.98	18.31	44.7
kg CO2 per visitor	37.85	11.83	11.18	93.96	9.27	36.22

OFF PEAK PERIOD 2021	CAR/VAN ETC.	BUS/COACH	ORGANISED COACH	PLANE/AIR	TRAIN	TOTAL
All visitors - Tons (metric) CO2	12,221	20	0	0	151	12,391
kg CO2 per day visitor	33.03	0.67	0	0	8.52	30.97
kg CO2 per staying visitor	57.98	13.42	0	0	15.89	55.96
kg CO2 per visitor	38.78	3.35	0	0	9.63	36.60



Comparison of transport environmental impacts by year and period

The key facts for the environmental impacts associated with visitors by type are shown below. Day visitors produced more kg CO2 per pound spent than staying visitors across both years and all periods. The amount of kg CO2 produced per pound spent for all visitor types was lower in the off peak season than peak season in both analysis years and the amount of kg CO2 produced per pound spent for all visitor types in the off peak period of 2022 was lower than the off peak period in 2021.

PEAK PERIOD 2022	CAR/VAN ETC.	BUS/COACH	ORGANISED COACH	PLANE/AIR	TRAIN	TOTAL
All visitors - Tons (metric) CO2	26,048	75	0	43	525	26,691
kg CO2 per day visitor	27.82	9.37	0	9.40	10.19	26.72
kg CO2 per staying visitor	48.24	4.32	0	9.40	17.85	44.62
kg CO2 per visitor	34.25	6.57	0	9.40	13.44	32.54

OFF PEAK PERIOD 2022	CAR/VAN ETC.	BUS/COACH	ORGANISED COACH	PLANE/AIR	TRAIN	TOTAL
All visitors - Tons (metric) CO2	12,510	69	0	272	152	13,003
kg CO2 per day visitor	21.75	4.16	0	93.98	2.27	20.80
kg CO2 per staying visitor	40.27	8.94	0	0.00	18.72	38.41
kg CO2 per visitor	25.47	4.80	0	93.98	7.50	24.33

MEASURES	PEAK 2021	OFF PEAK 2021	PEAK 2022	OFF PEAK 2022
Day visitors - Tons (metric) CO2	20,985	8,125	14,794	8,889
Staying visitors - Tons (metric) CO2	13,922	4,266	11,897	4,114
All visitors - Tons (metric) CO2	34,907	12,391	26,691	13,003
kg CO2 per day visitor	32.17	30.97	26.72	20.80
kg CO2 per staying visitor	44.7	55.96	44.62	38.41
kg CO2 per visitor	36.22	36.60	32.54	24.33
kg CO2 per day visitor £ spend	0.99	0.7	0.9	0.56
kg CO2 per staying visitor £ spent	0.14	0.22	0.13	0.16
kg CO2 per visitor £ spent	0.29	0.4	0.25	0.31

Impacts associated with all peak visits to West Cornwall in 2022

The table below shows the impacts associated with each of the listed modes of transport by visitor type for their peak period trip to West Cornwall in 2022 in terms of the total tons of CO2 generated and the amount of CO2 per visitor type using the mode of transport. The total CO2 generated was 26,691 tons (14,794 tons generated by day visitors and 11,897 by staying visitors), although more was again generated per visitor by staying visitors than day visitors.

PEAK PERIOD 2022	CAR/VAN ETC.	BUS/COACH	ORGANISED COACH	PLANE/AIR	TRAIN	TOTAL
Day visitors Tons (metric) CO2	14,494	48	0	24	229	14,794
Staying visitors Tons (metric) CO2	11,554	28	0	20	296	11,897
All visitors - Tons (metric) CO2	26,048	75	0	43	525	26,691
kg CO2 per day visitor	27.82	9.37	0	9.40	10.19	26.72
kg CO2 per staying visitor	48.24	4.32	0	9.40	17.85	44.62
kg CO2 per visitor	34.25	6.57	0	9.40	13.44	32.54

Unsurprisingly, the largest amount of CO2 generated was by visitors using self catering accommodation (59% of peak period visitors - 6,332 tons).

PEAK PERIOD 2022	ALL STAYING VISITS (EXC VFR)	SERVICED ACCOMMODATION (HOTEL/B&B/ GUEST HOUSE)	SELF CATERING	OWN SECOND HOME	CAMPING/OWN CARAVAN	STATIC CARAVAN/ HOLIDAY PARK
% using accommodation type	100%	14%	59%	1%	20%	6%
Numbers using accommodation type	247,957	35,143	146,431	1,952	48,810	15,619
Average length of stay	6.02	3.69	5.84	7.47	7.80	7.28
Visitor nights	1,493,640	129,818	854,759	14,586	380,703	113,773
Tons (metric) CO2	11,064	962	6,332	108	2,820	843

Impacts associated with all off peak visits to West Cornwall in 2022

The table below shows the impacts associated with each of the listed modes of transport by visitor type for their off peak period trip to West Cornwall in 2022 in terms of the total tons of CO2 generated and the amount of CO2 per visitor type using the mode of transport. The total CO2 generated was 13,003 tons (8,889 tons generated by day visitors and 4,114 by staying visitors), although more was again generated per visitor by staying visitors than day visitors.

OFF PEAK PERIOD 2022	CAR/VAN ETC.	BUS/COACH	ORGANISED COACH	PLANE/AIR	TRAIN	TOTAL
Day visitors Tons (metric) CO2	8,534	52	0	272	31	8,889
Staying visitors Tons (metric) CO2	3,976	17	0	0	120	4,114
All visitors - Tons (metric) CO2	12,510	69	0	272	152	13,003
kg CO2 per day visitor	21.75	4.16	0	93.98	2.27	20.80
kg CO2 per staying visitor	40.27	8.94	0	0.00	18.72	38.41
kg CO2 per visitor	25.47	4.80	0	93.98	7.50	24.33

Unsurprisingly, the largest amount of CO2 generated was by visitors using self catering accommodation (50% of off peak period visitors - 2,259 tons).

OFF PEAK PERIOD 2022	ALL STAYING VISITS (EXC VFR)	SERVICED ACCOMMODATION (HOTEL/B&B/ GUEST HOUSE)	SELF CATERING	OWN SECOND HOME	CAMPING/OWN CARAVAN	STATIC CARAVAN/ HOLIDAY PARK
% using accommodation type	100%	26%	50%	2%	9%	13%
Numbers using accommodation type	99,608	25,985	49,804	2,165	8,662	12,992
Average length of stay	4.50	2.24	5.32	4.37	8.27	3.43
Visitor nights	448,493	58,088	264,773	9,456	71,597	44,579
Tons (metric) CO2	3,826	496	2,259	81	611	380

CASE STUDY

Gifting trees to empower the local community to tackle the climate crisis



Alex Forrester is Project Officer, Forest For Cornwall at Cornwall Council

WHAT WE DO:

Forest for Cornwall aims to support and empower the people of Cornwall to tackle the climate and ecological emergencies. It is the flagship project of the Climate Change Action Plan which was created when Cornwall Council declared a climate emergency in 2019. Our ambitious target is to create 8,000 hectares of new canopy cover across Cornwall by 2030 and we want to achieve this by helping residents, communities, farmers and landowners to plant the right trees, in the right place for the right purpose. This includes everything from planting new woodlands and hedgerows to individual trees in gardens across Cornwall.

HOW WE DO IT:

We were approached by the EXPERIENCE team and artist Emma Smith to co-organise a tree gifting event. As part of the art commission 'Gwelen', Emma Smith proposed to create a climate positive artwork and that for every sculpture made a tree would be gifted to a local resident or organisation, in this way re-greening the original woodland of the submerged forest which inspires the artwork. On 9th December 2022, at Newlyn Art Gallery, we provided planting guidance and gifted 85 hazel saplings to local residents. Hazel was a common species in the submerged forest hidden in Mount's Bay and is an ideal tree to plant in a garden.



TREES ARE AN INCREDIBLE RESOURCE WHEN IT COMES TO LOOKING AFTER AND ENHANCING THE ENVIRONMENT. *Amongst many other things, they help mitigate the effects of climate change by capturing and storing carbon.*

They provide strong eco-system services providing habitat and food for biodiversity and wildlife. In an urban setting, trees can filter pollutants in the air and reduce surface water flooding. Access to woodlands and trees has also been shown to greatly improve people's mental and physical health.



OUR TIP:

Connect to existing schemes or charities to get their expertise and knowledge. You will also benefit by tapping into their network and their communications.





SOCIAL PERFORMANCE EVALUATION



Seb Lewis © Mike Newman

EXECUTIVE SUMMARY



75.2% OF RESIDENTS either strongly, agree or somewhat agree that “sustainable tourism should be more encouraged in the local area.”



79% OF RESIDENTS responding they would use the coast path more once the upgrade was complete.

Mixed perceptions on the impacts of tourism

- **BENEFITS THE LOCAL ECONOMY:** 59.9% agree that ‘Tourism provides the economic livelihood of the local area, and it would suffer without it’.
- **RECREATION:** +3% increase in winter of those who agree that “Tourism increases availability of local recreation facilities/opportunities”
- **HARMFUL TO NATURAL PLACES:** in winter an increase +5.6% in residents who disagree with ‘Tourism is harmful to natural places like countryside or coastal areas.’
- **IMPACT ON INFRASTRUCTURE:** in winter an increase of +4.31% in residents who disagree with ‘Tourism overwhelms our local facilities (roads, car parking, public transport, litter, etc.)’.

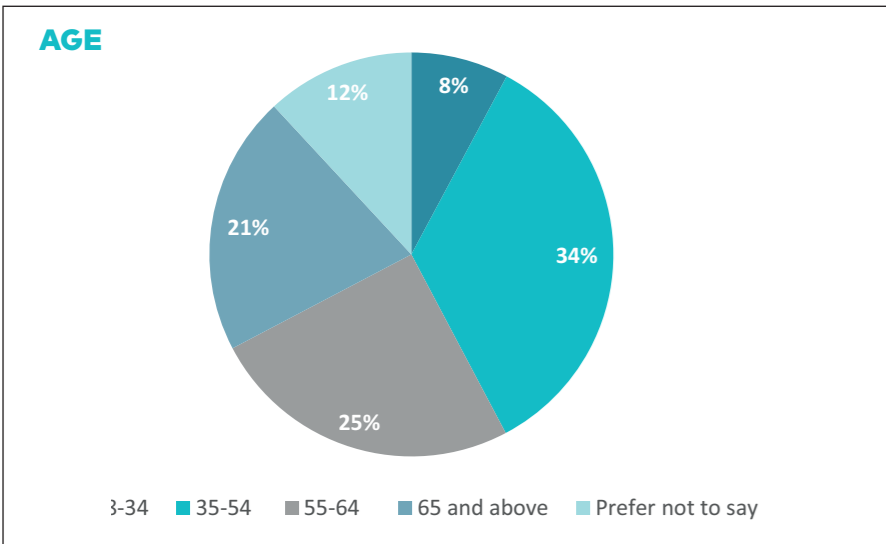
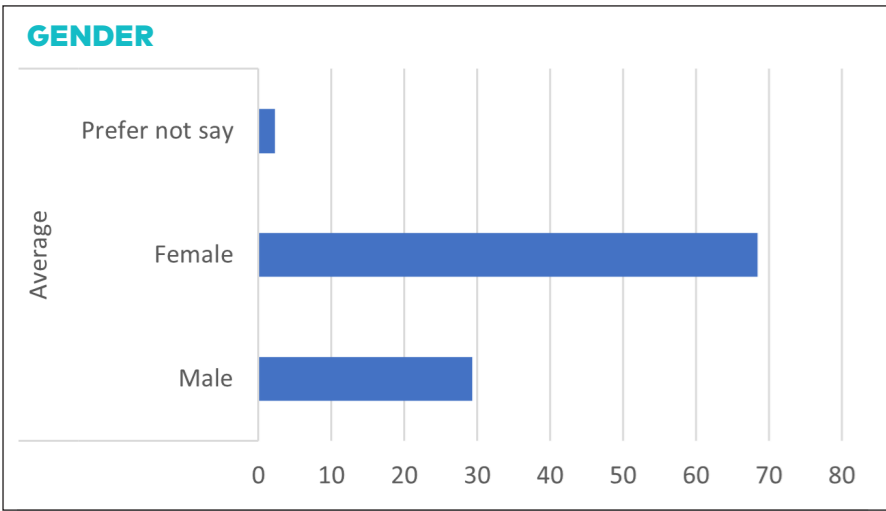
DATA AND ANALYSIS

Cornwall Council collected data to measure the social impact of the EXPERIENCE project by distributing an online seasonal survey (winter/summer) to residents in the pilot region of Penzance and its surrounding. The survey was created in collaboration with University of Surrey. To date, Cornwall Council has collected 4 sets of data, 2 for winter (2020/21 & 2021/22) and 2 for summer (2021 & 2022). The total number of respondents is 1,439. We received 241 responses for Winter 2020/21, 336 for Summer 2021, 442 for Winter 2021/22 and 420 for Summer 2022. The survey was promoted online via Cornwall Council’s social media channels and boosted via Facebook ads.

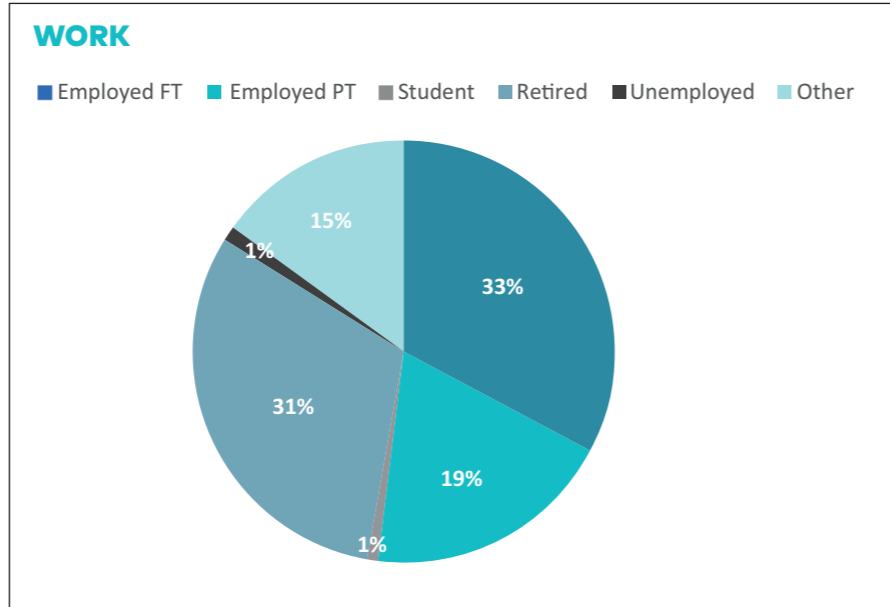
The online survey aims to capture perceptions around the impacts of summer and winter tourism, with the central aim to identify key areas and trends that differ seasonally. By doing this, trends and parallels will be outlined to create a picture of how seasonal changes in tourism activity can impact residents’ views towards the sector, highlighting the benefits and challenges it can bring to local communities.



Sample demographics: age and gender



The largest group of respondents was 35-54 with 34.49% responding to the survey, then 55-64 with 25.8% and 18-34 only making up 8%.



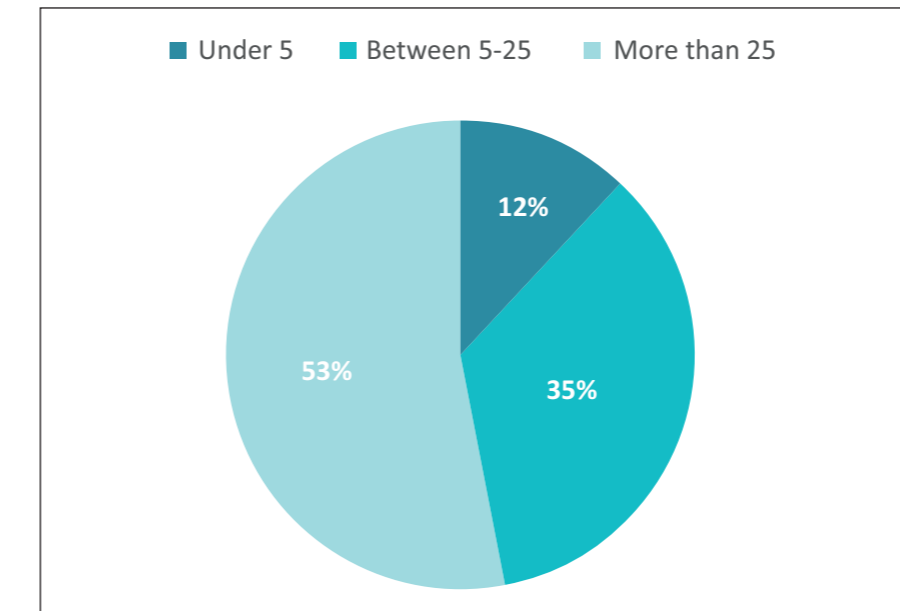
On average, the largest groups of respondents were either employed full-time (33%) or retired (31%), then followed by employed part-time (19%) and other (15%).



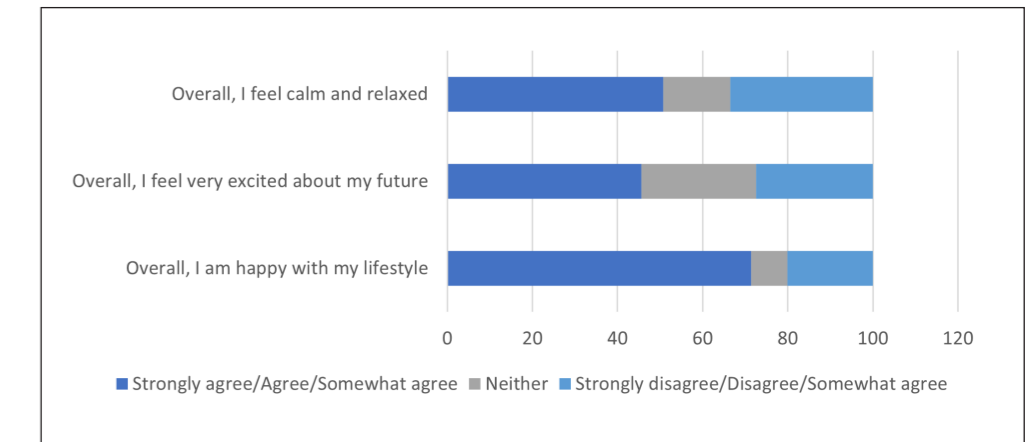
Well-being

RELATIONSHIP TO LOCAL AREA

Most respondents have a strong connection to the local area, with over half of the survey respondents (52.8%) having lived in the pilot region for over 25 years and 34.8% living in the area between 5-25 years.

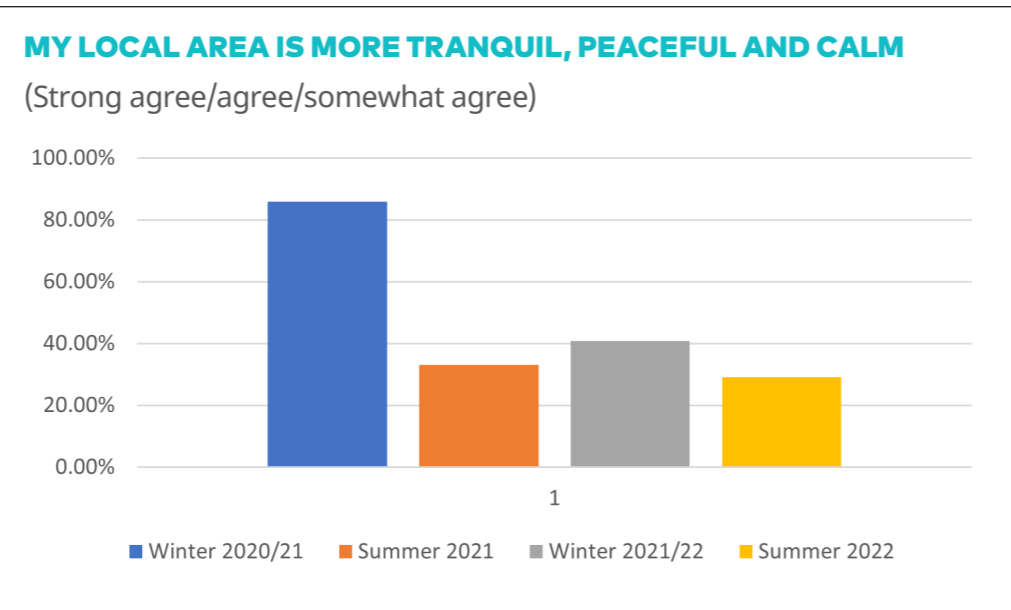
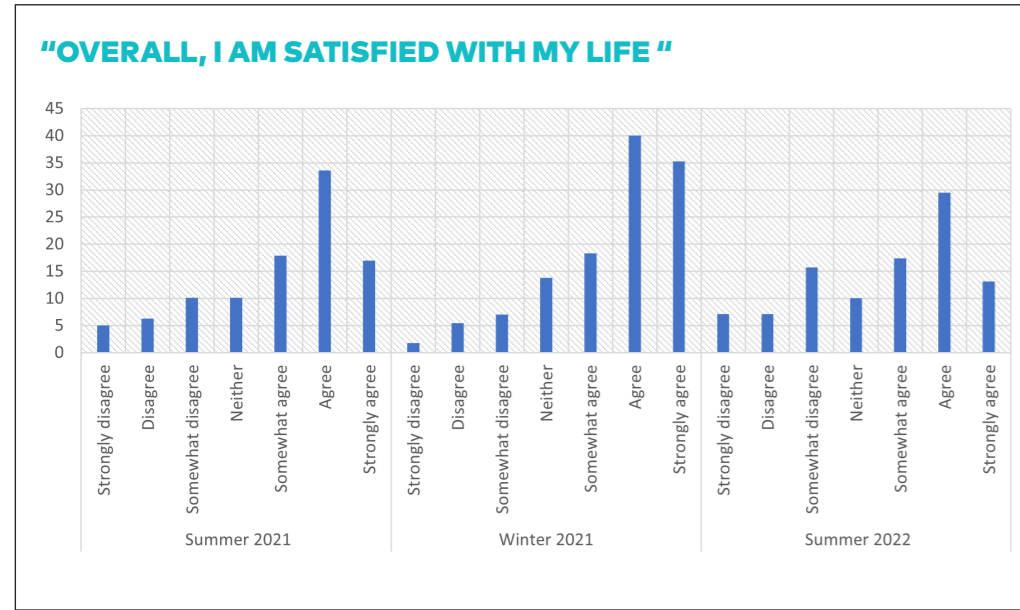


Across surveys and seasons there are consistent strong feelings of satisfaction with most people feeling positive about their local area in relation to their well-being.



WINTER VS. SUMMER

There was a notable increase in well-being satisfaction in winter 2021/22, comparably to summer 2021 and summer 2022, with a 25% increase in people either strongly agreeing or agreeing to: "Overall, I am satisfied with my life". We can therefore see that the increase in visitors out-of-season due to EXPERIENCE's activities did not affect resident's well-being as much as tourism activities did in summer.

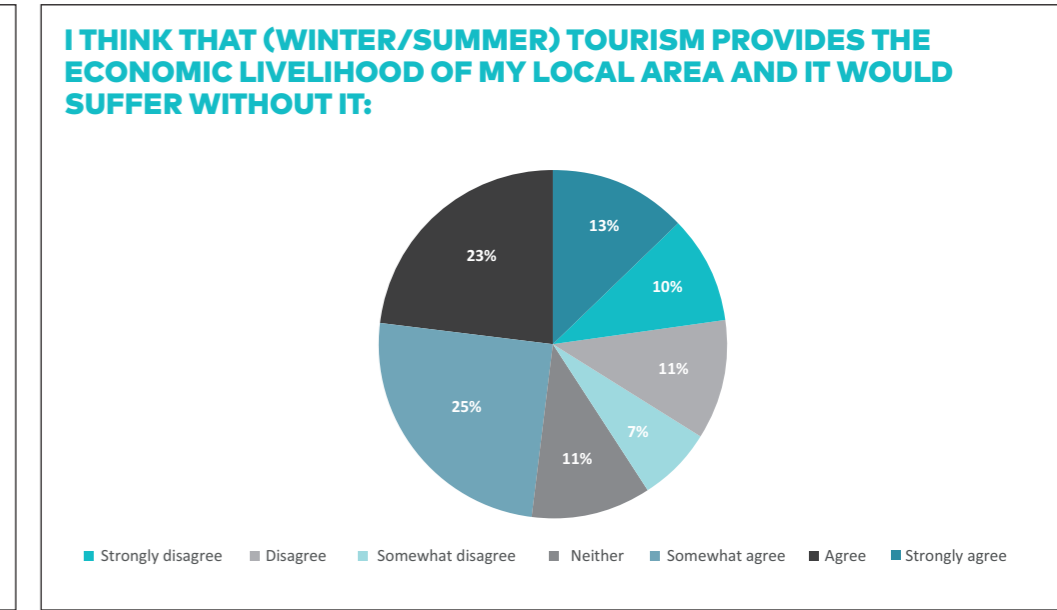
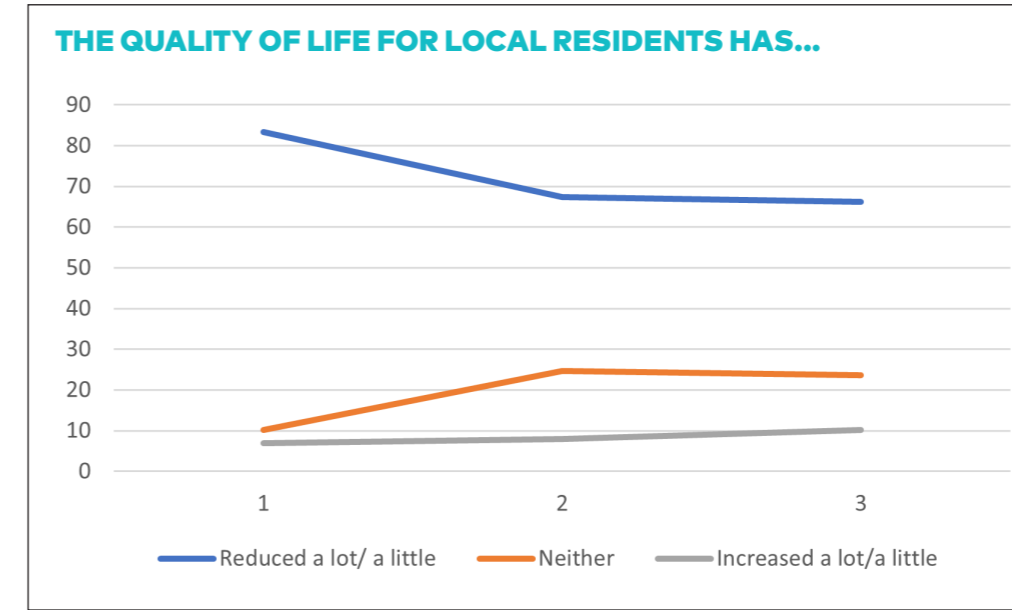


We can also see that residents felt less impacted by the winter 2021/22 tourism activities with +11.67% agreeing with

"My local area is more tranquil, peaceful and calm" compared to summer 2022. This suggests that the impact of the additional visitors from the EXPERIENCE activities was perceived to be less damaging than those in summer.

QUALITY OF LIFE

Between summer 2021 and summer 2022, there has been an increase of + 3.39% in people feeling their quality of life has improved. They are also feeling less negative with a decrease of -16.89% of people responding who feel their quality of life has reduced.



VARIATION IN ACCEPTANCE OF TOURISTS WINTER VS SUMMER

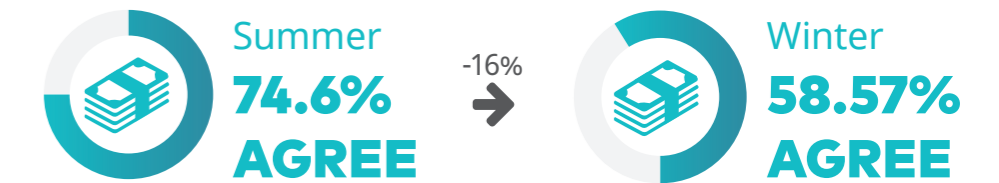
Tourism is a challenging subject in Cornwall. The resident survey reflects this with mixed perceptions and responses. Whilst residents recognise the benefits to the local economy and how it contributes to the preservation of assets, they also have concerns regarding tourism's impact on the natural environment and how it puts pressure on local infrastructure and services.

BENEFITS TO LOCAL ECONOMY AND JOBS

Residents recognise the value of tourism and its importance to the local economy, with on average 59.9% agreeing (incl. strongly & somewhat) that it provides the economic livelihood of the local area and it would suffer without it.

When asked "Tourism increases job opportunities", on average, 66.6% of respondents either strongly, agree or somewhat agree. However, there is a notable decrease of -16% in winter (58.57%) compared to summer (74.6%).

"TOURISM INCREASES JOB OPPORTUNITIES"



When asked “Tourism improves the local economy”, on average 69.95% of respondents either strongly, agree or somewhat agree. However, there is a notable decrease of - 11.29% in winter (64.3%) compared to summer (75.5%).



SUSTAINABILITY

75.2% of residents either strongly, agree or somewhat agree that “sustainable tourism should be more encouraged in the local area.”

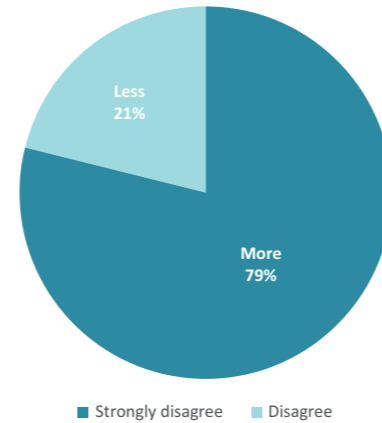
LOCAL RECREATION FACILITIES & OPPORTUNITIES

There is also an improvement in perception during winter with a +3% increase on average of residents agreeing that “Tourism increases availability of local recreation facilities/opportunities” (42.9% either strongly agreeing, agreeing or somewhat agreeing in winter and 39.8% strongly agreeing, agreeing or somewhat agreeing in summer).



With additional activities curated and promoted by the EXPERIENCE project, the availability of recreation facilities has seemed to improve over winter compared to summer. The infrastructure upgrade (T3.2.1), the refurbishment of the Mount’s Bay coast path, is an example of this: it has been very well received with on average 79% of residents responding they would use the path more.

ONCE THE PATH UPGRADE IS COMPLETED, WILL YOU USE THE COAST PAHT FROM PENZANCE TO MARAZION MORE OFTEN OR LESS OFTEN NOW?



AREA FOR IMPROVEMENTS

The two main areas where residents are concerned are tourism’s impact on the environment and the pressure it inflicts on local infrastructure and facilities.

IMPACT ON THE NATURAL ENVIRONMENT

When comparing all sets of seasonal data, there is a trend with residents feeling that tourism harms natural places. When asked if ‘Tourism protects and enhances the natural environment’, on average 73% of residents strongly disagree/disagree/somewhat disagree.

However, when comparing winter and summer, there is an improvement in perception, with an increase with those who disagree with +5.6% of respondents disagreeing to the statement ‘Tourism is harmful to natural places like countryside or coastal areas’ (winter: 14.42% and summer: 8.8% on average strongly disagree/disagree/somewhat disagree).

“TOURISM IS HARMFUL TO NATURAL PLACES LIKE COUNTRYSIDE OR COASTAL AREAS”



PRESSURE ON INFRASTRUCTURE AND FACILITIES

When looking at findings for public services and facilities, such as toilets, parking and roads, we can see there is a strong sentiment that tourism overwhelms the local facilities.

Most residents agree with the statement ‘Tourism overwhelms our local facilities (roads, car parking, public transport, litter, etc.)’. However, there is an increase of those disagreeing with the statement, +4.31% in winter, suggesting the negative impacts are less felt in Oct-Mar.

‘TOURISM OVERWHELMS OUR LOCAL FACILITIES (ROADS, CAR PARKING, PUBLIC TRANSPORT, LITTER)

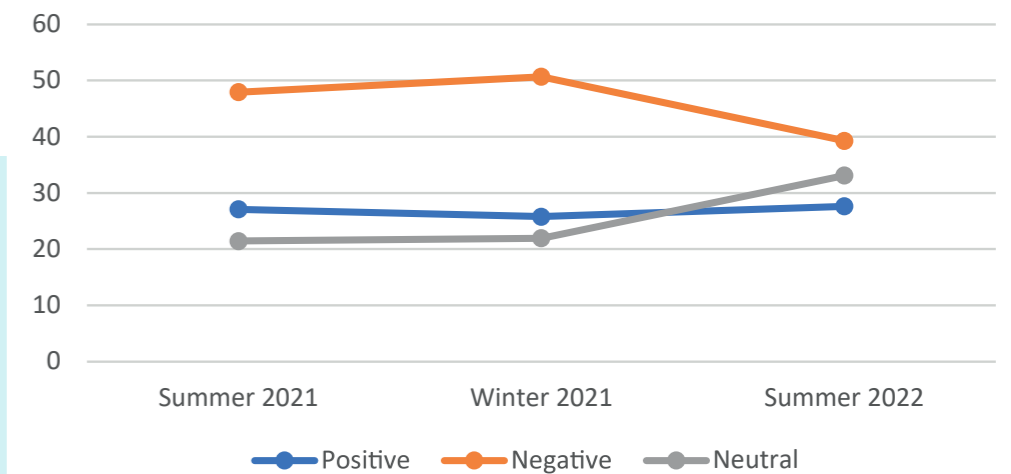


SATISFACTION WITH TOURISM OFFER WINTER VS SUMMER IMPACTS OF COVID

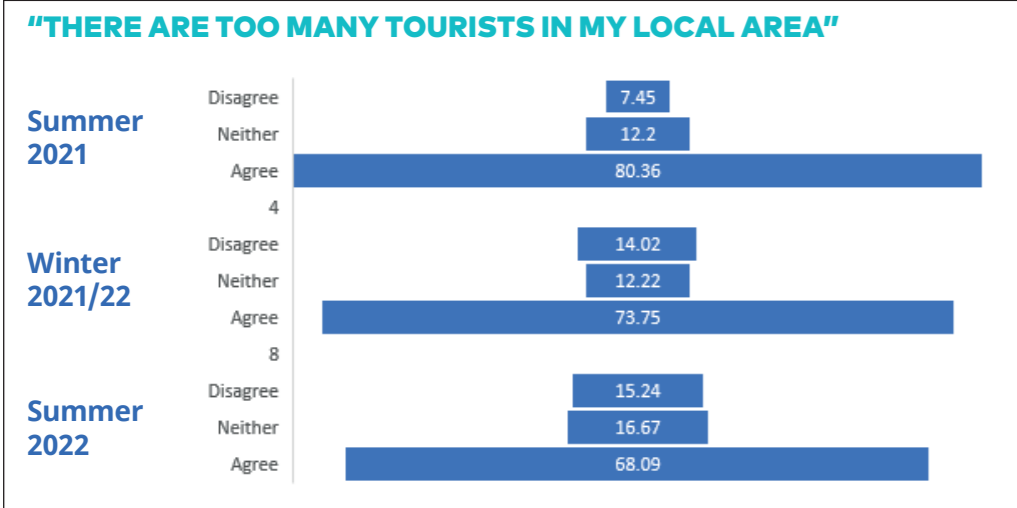
Due to the impact of Covid restrictions on international travel, summer 2021 saw a swell of visitors to Cornwall as visitors opted for domestic holidays. This is reflected in the residents’ responses in the summer 2021 and winter 2021/22 surveys where we can see stronger dissatisfaction towards tourism.

In general, residents feel the impact of tourism in their local area is negative (average of 45.9%). However, there is a recent shift with more people responding they feel neutral, with an increase by 11.15% in summer 2022 since winter 2021/22. This trend reflects the mixed perceptions and feelings towards tourism in their local area.

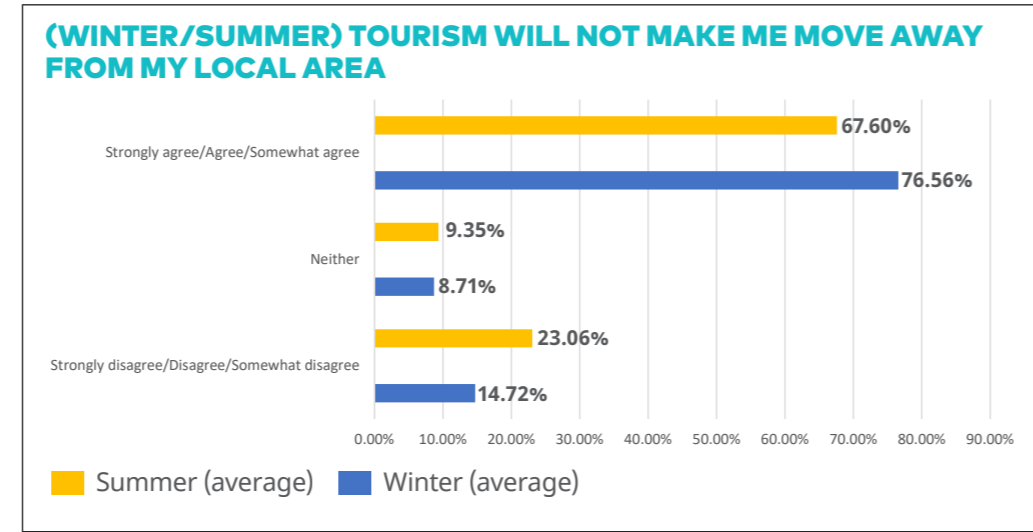
OVERALL, DO YOU FEEL THE IMPACT OF TOURISM IN YOUR LOCAL AREA IS...?



Although there is an overall feeling that there is over-tourism in Cornwall, opinions have been shifting towards a more nuanced discourse. Between summer 2021 and summer 2021 there has been a -12.27% decrease in the amount of people agreeing “there are too many tourists in my local area.”

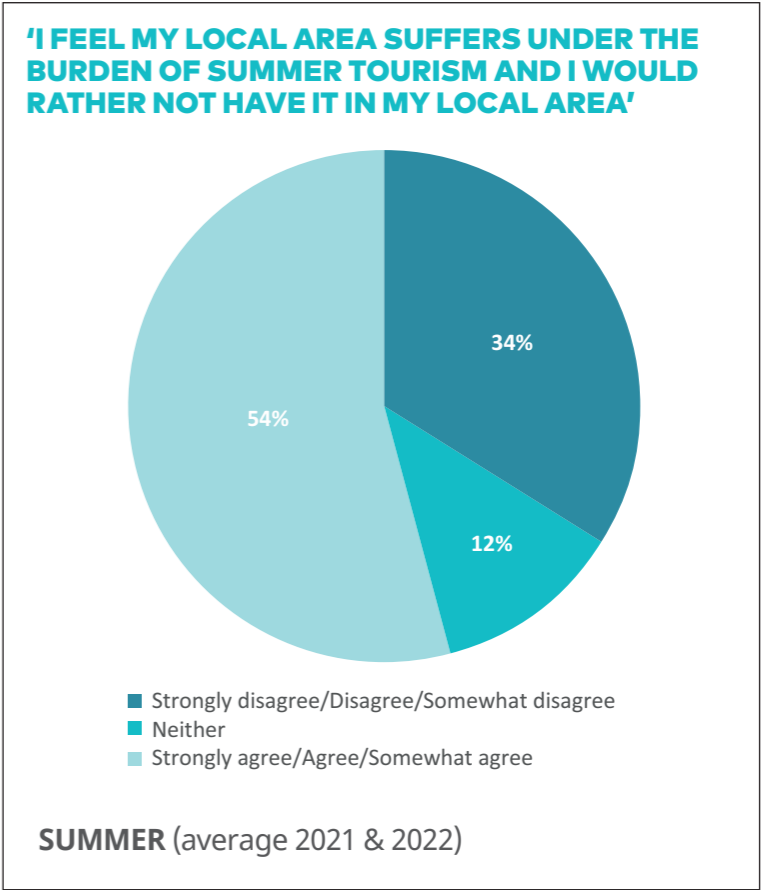
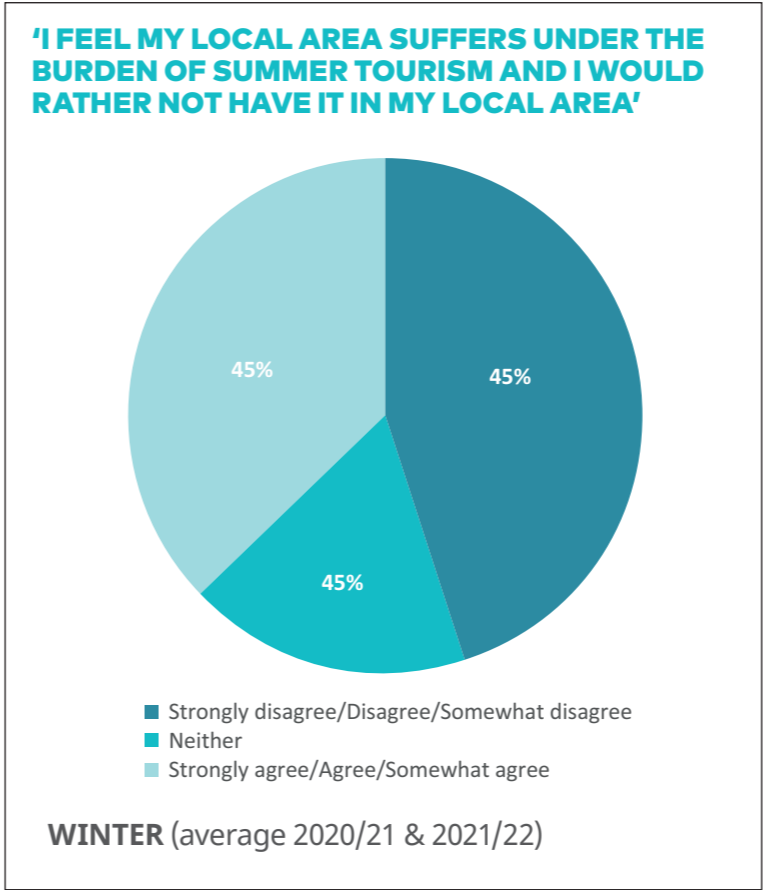
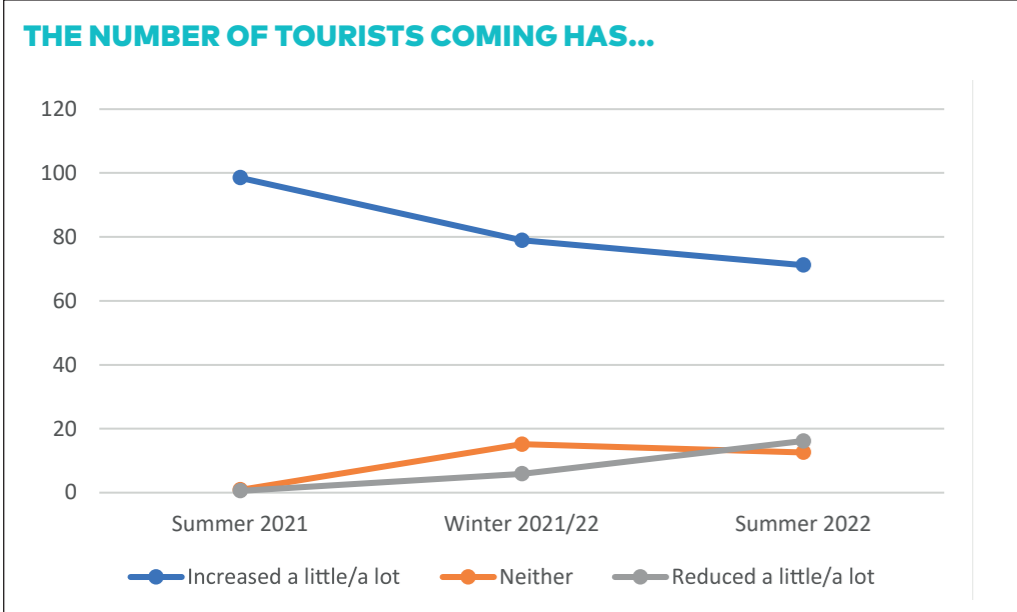


We can also observe some seasonal shifts in perception from summer to winter. Residents feel that tourism is less likely to make them move away from their local area in winter than in summer. When comparing winter and summer answers for the statement "(Winter/summer) Tourism will not make me move away from my local area", in winter there is + 8.9% increase in people who strongly agree, agree, somewhat agree (76.56% in winter & 67.5% in summer, on average).



There is also a noticeable shift in perception in winter, we can see +11% of residents strongly disagreeing, disagreeing or somewhat disagreeing with the statement "I feel that the local area suffers under the burden of (summer/winter) tourism and I would rather not have it in their local area".

In addition, when asked if the number of tourists has increased or reduced, there is a gradual shift in perception with less people feeling that this has increased a lot/a little (98.51% in summer 2021 vs. 71.2% in summer 2022).



Overall, we can conclude that even with an increase of visitors during winter periods due to EXPERIENCE's activities, the majority of residents feel it impacts less on their life and well-being than in summer.

CASE STUDY

Creating a legacy: artwork that empowers the locals and triggers a sense of place



Léa Guzzo – Former Senior Culture & Creative Industries Officer at Cornwall Council

WHAT WE DO:

We have learned that commissioning art that is inclusive and engages our residents is key to increase everyone's participation in culture. Our latest example is 'Gwelen', co-created by artist Emma Smith and residents of West Penwith.

HOW WE DO IT:

'Gwelen' is a site-specific artwork made for and by the local community. The artwork is made up of 85 sculptures along the coastal path between Marazion and Penzance. Named Gwelen - gwel means rod, pole, wand and gweles is to see – the artwork is an invitation to rest and imagine the ancient, submerged forest hidden in Mounts Bay, an enchanting phenomenon that is rarely seen, but occasionally uncovered at very low tides.

Each sculpture was tailor-made to support the poses and measurements of over 600 residents who contributed ideas on how they would like to sit or stand whilst pausing along the coastal path.



GWELLEN' IS A SITE-SPECIFIC ARTWORK made for and by the local community. The artwork is made up of 85 sculptures along the coastal path between Marazion and Penzance.

To create long-lasting place-making, as part of the art commission, the artist ran an ambitious engagement programme within the local community. This included talks, open studio events, foraging and woodworking workshops. Contributors to the designs include residents, students, parents and community groups and individuals who responded through an open call. Once installed, each participant was sent a map with a number, showing where 'their' sculpture is along the trail.

This unique approach has ensured the artwork's long-lasting legacy, creating a sense of ownership within the local community.

OUR TIP:

Carefully consider who sits on the selection panel for a public art commission. When writing the brief/tender, build in social engagement as essential to the making and delivery of the artwork.



Pebbles © Ben Barrel

EXPERIENCE WEST CORNWALL

jn 53222 04/23

The Vault Cafe