

May 2021

Interreg FCE EXPERIENCE Project

EXPERIENCE Marazion & Penzance

Options Analysis Report

Produced by



EXPERIENCE
MARAZION
& PENZANCE

Interreg 
France (Channel
Manche) England
EXPERIENCE
European Regional Development Fund


EUROPEAN UNION
European Regional
Development Fund

 **CORNWALL
COUNCIL**
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- 01 Sustainable Cultural Tourism
- 02 Introduction to Experiential Tourism
- 03 Experiential Tourism Trends
- 04 Bookability & the Tourism Distribution Landscape
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01 Sustainable Cultural Tourism

EXPERIENCE Tourism Strategy

COLLABORATION BETWEEN THE TOURISM AND CULTURE INDUSTRY IS VITAL TO ACHIEVE OUR GOAL, WITH COMMUNITY INPUT THROUGHOUT.



EXPERIENCE is a tourism strategy to extend the traditional season and encourage visitors during the quieter months (October – March). By supporting businesses in the Penzance (and surrounding areas) to create new or adapted sustainable cultural experiences for the autumn and winter period.

The project aims to move towards a sustainable cultural tourism model, providing a new perspective of the cultural heritage and identity of a place, leaving a positive impact for both local communities and visitors alike.

EXPERIENCE will create a tourism strategy shift from a 'destination' model to a sustainable cultural tourism approach. Striking a balance between economic development and the protection of cultural heritage and natural environment.

Sustainable Cultural Tourism

Tourism naturally encourages engagement with the cultural identity of an area, but it also brings challenges related to overcrowding. The sector brings money into the region, but it can also be damaging to community life and the natural environment. Sustainable cultural tourism aims to find the balance between the two, encouraging visitors to engage with the cultural identity and location in a sustainable and respectable way.

Image: Penzance Harbour

"A TOURISM PRODUCT
IS WHAT YOU BUY;

A TOURISM EXPERIENCE
IS WHAT YOU REMEMBER"

Canadian Tourism Commission

"Baking bread in one of the
oldest ovens in England is a
memory I will never forget!"



'Behind the Scenes of a Stately Home' experience
at Haddon Hall in the Peak District National Park

02 Introduction to Experiential Tourism

The components of an experience

Experiential tourism provides a brand new layer of opportunities well beyond the traditional tourism landscape of products based on goods or services.

An experience actively involves visitors to partake, where they will create lasting memories and have the opportunity to engage with local stories, culture and to connect with the essence of a place and its people.

Its the alignment of the following four components that develops a visitor experience;

- Resources
- Product
- Services
- Local Stories & People

The components of a 'Marazion & Penzance experience'



02 Introduction to Experiential Tourism

Progression of economic value

For businesses in Penzance and surrounding areas, there are plenty of opportunities beyond delivering traditional tourism products based on goods and services.

The Canadian Tourism Commission refers to this as 'The Progression of Economic Value'. The following diagram illustrates the process of moving from offering individual commodities, products and services to delivering compelling and engaging experiences.

EXPERIENCES
= GREATER ECONOMIC VALUE



© Polgoon Vineyard

POLGOON VINEYARD EXAMPLE

Greater differentiation

Higher yield



Source: Nancy Arsenault, Celes Davar and Todd Lucier (2011)

02 Introduction to Experiential Tourism

Case study examples: The following case studies highlight experiences that currently exist in the marketplace and are being distributed by Online Travel Agents (OTAs). These have been selected as they demonstrate the types of experiences that could be developed in Penzance and surrounding areas.



FISH AND SHIPS

Explore the higgledy-piggledy village of Staithes on the stunning National Park coastline with a local guide who will point out the traditional Cobble boats in the picturesque harbour. Board a boat skippered by a local fisherman and find the best fishing spots where you can try your hand at fishing or go further out where you may spot whales. Enjoy some fresh fish and chips, perhaps with a local beer, in a pub looking out to sea. Some evenings may also be enlivened by local folk music or sea shanties!

- ✓ Explore the small fishing village of Staithes – look out for artists' studios, galleries & optical illusions
- ✓ See the Yorkshire Coast from the sea with the chance to fish or watch for whales
- ✓ Enjoy traditional fish and chips in a pub with great harbour views

6 hours | £150 per person



FOSSILS, FORAGE AND FEAST

Connect with nature on this fun coastal adventure. Join experienced leaders to explore a hidden cove, such as Boggle Hole or Runswick Bay, on the North York Moors Heritage Coast. Go on a journey of discovery to find secret plants and creatures hiding in rock pools, discover Jurassic fossils, and forage for delicious seashore snacks. Delight in cooking and eating some of the food you find, which is extra tasty when cooked on an open beach fire.

- ✓ Search for fossils not seen for 200 million years and take your finds home as keepsakes
- ✓ Forage for delicacies on the coast, cook and eat what you find on an open fire
- ✓ Connect with nature on the stunning National Park coastline

4 hours | £75 per person



SURF, YOGA AND WOODLAND WILD CAMP

Develop your surfing skills and get to know the best beaches in Cornwall on this 2-day Experience. Spending day one focused on learning basic surfing technique, then we'll end the day with a restorative yoga session back at the camp in the woodlands. In the evening, we'll BBQ, do axe throwing, enjoy the campfire, and sleep in shared canvas bell tents.

The next day, we'll wake up with a yoga session then build on our surfing knowledge at another of Newquay's renowned beaches.

- ✓ Two day Experience
- ✓ Learn to surf
- ✓ Yoga sessions

2 days | £169 per person

02 Introduction to Experiential Tourism

Case study examples:



HILLS, HEATH, HOPS AND HAMPERS

Walk in the steps of our ancestors exploring Black Down, the highest point and a hidden heathland treasure within the National Park. With an experienced local guide leading the way, discover the fascinating history and geology of the area while listening to the birdsong. Enjoy stunning views of patchwork fields, rolling hills and ancient woodland. Savour a delicious luxury picnic full of scrumptious local produce at one of the best viewpoints. Complete the experience with a visit to an award-winning independent microbrewery for a fun guided tour and ale tasting session.

- ✓ Local expert-led guided walk with stunning views of the local landscape – bring your camera!
- ✓ Reconnect with nature whilst enjoying a locally sourced picnic
- ✓ Craft ale brewery tour in 18th Century building

4 hours | Cost per person £65



ARTY FOOTSTEPS

Ignite your creativity with a guided walk in the Breamish Valley in Northumberland National Park, followed by a creative art session with a professional local artist. Let the landscape's prehistoric features, vast skies, wonderful views and plentiful wildlife inspire you to create an everlasting memory of your experience. Enjoy a delicious lunch made with ingredients from local Northumberland producers, courtesy Ingram Café.

- ✓ Guided walk through remarkable prehistoric landscape
- ✓ Walk with a professional guide and work with a professional artist
- ✓ Create your own artwork to remember the experience

4 hours | £140 per person



What should Penzance visitor experiences look like?

Experiences should play to their strengths and convey a real “sense of place” to its visitors, creating memorable moments that tell the story of its people and of its culture and heritage.

Experiences will connect visitors with the history, geography and culture of Cornwall and have the potential to be built into wider itineraries and holidays, giving extra reasons to stay for longer.

Sources: Airbnb Experiences, Unmissable England, The English National Park Experience Collection 2020

03 Experiential Tourism Trends



A Breath of Fresh Air

If the Covid-19 pandemic has told us anything, it's reminded us how important our outdoor spaces really are. Across Britain in 2020, we saw a huge uplift in re-engagement with the great outdoors and nature. Visitors more than ever are looking to reconnect with friends and family through shared experiences in the natural environment and open spaces.

In the same year TripAdvisor saw a noticeable dispersal of travel and tourism away from urban centres to less populated destinations. A desire to enjoy the outdoors was not just informing visitors' destination choices, its factoring into their choice of accommodation too with visitors looking for places to stay in less well-know locations.

Booking.com reported that 54% of global travellers wanted to play a part in reducing over-tourism and 51% were interested in swapping destinations for a lesser known but similar alternative.

"Traveling off-the-beaten-track is the new Paris"

Motivated in part to avoid crowds as well as higher prices, visitors are beginning to see the benefits of discovering places that are little less explored or off the beaten-track.



03 Experiential Tourism Trends

The building blocks of how visitors would like to feel on their next holiday in the UK



Escape their town or city

Learn something new

Reconnect with nature and outdoors

Improve their wellbeing

Feel refreshed

Go off the beaten track

Immerse themselves in culture

Share with friends and family

Explore freely

Support local businesses

Explore Mount's Bay
Escape and immerse yourself in all that Mount's Bay has to offer - from its vibrant coastal communities, the hidden treasures of Europe's largest freshwater reed bed and a stop off point for thousands of migratory birds, and wide open views of the bay and sandy quiet beaches of Marazion and Long Rock.

Resources: Marazion Marsh RSPB nature, the art trail, South West Coast Path.

EXPERIENCE EXAMPLE

Principles

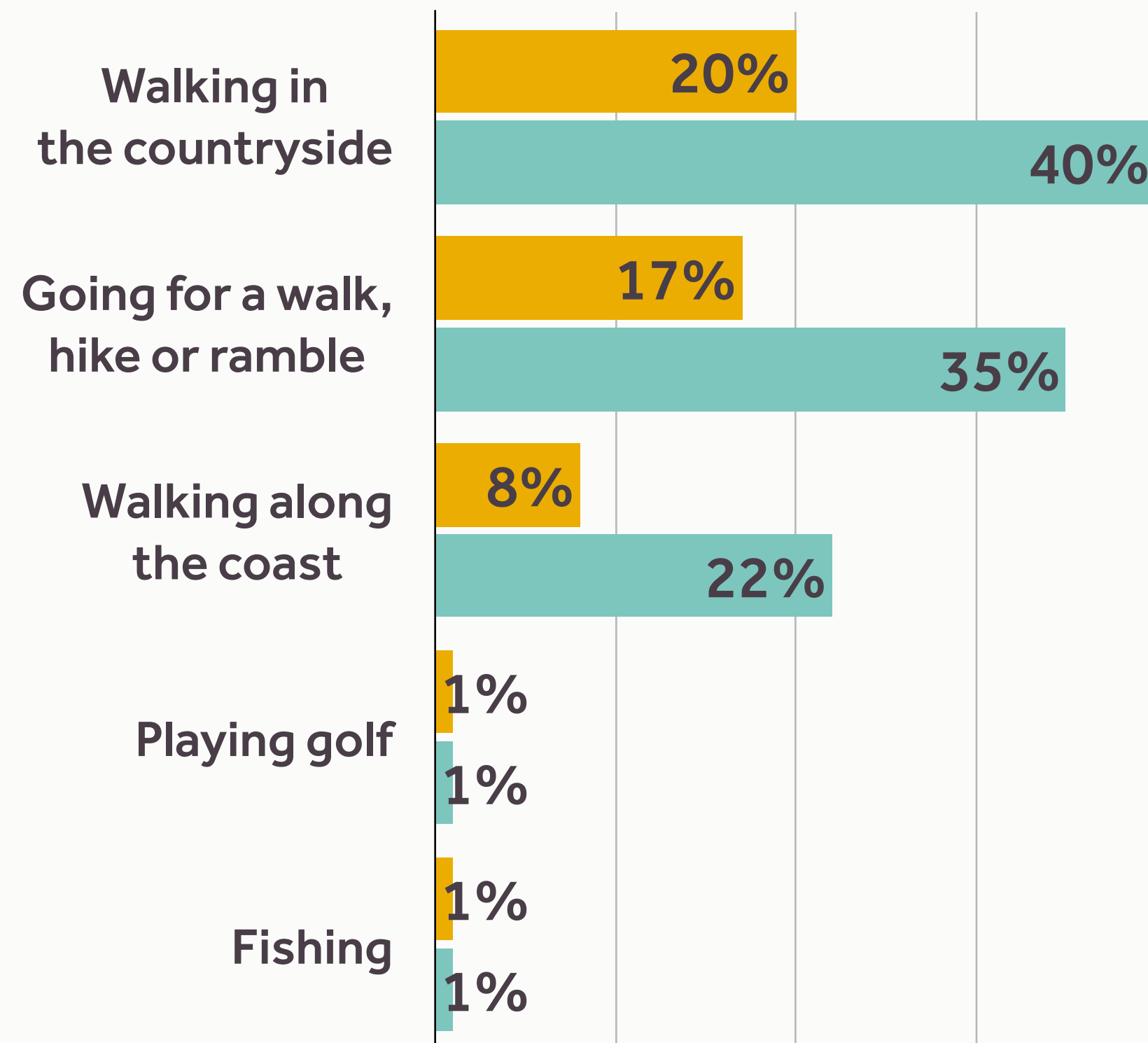
These building blocks represent how the nation, if not the world, may feel on what inspires them to book an experience. These principles will resonate with many visitors coming to Penzance in 2021/22 and likely for a few years to come. It's these principles that will provide businesses with the framework of developing new experiences especially in the low season when visitor can feel a sense of escape.



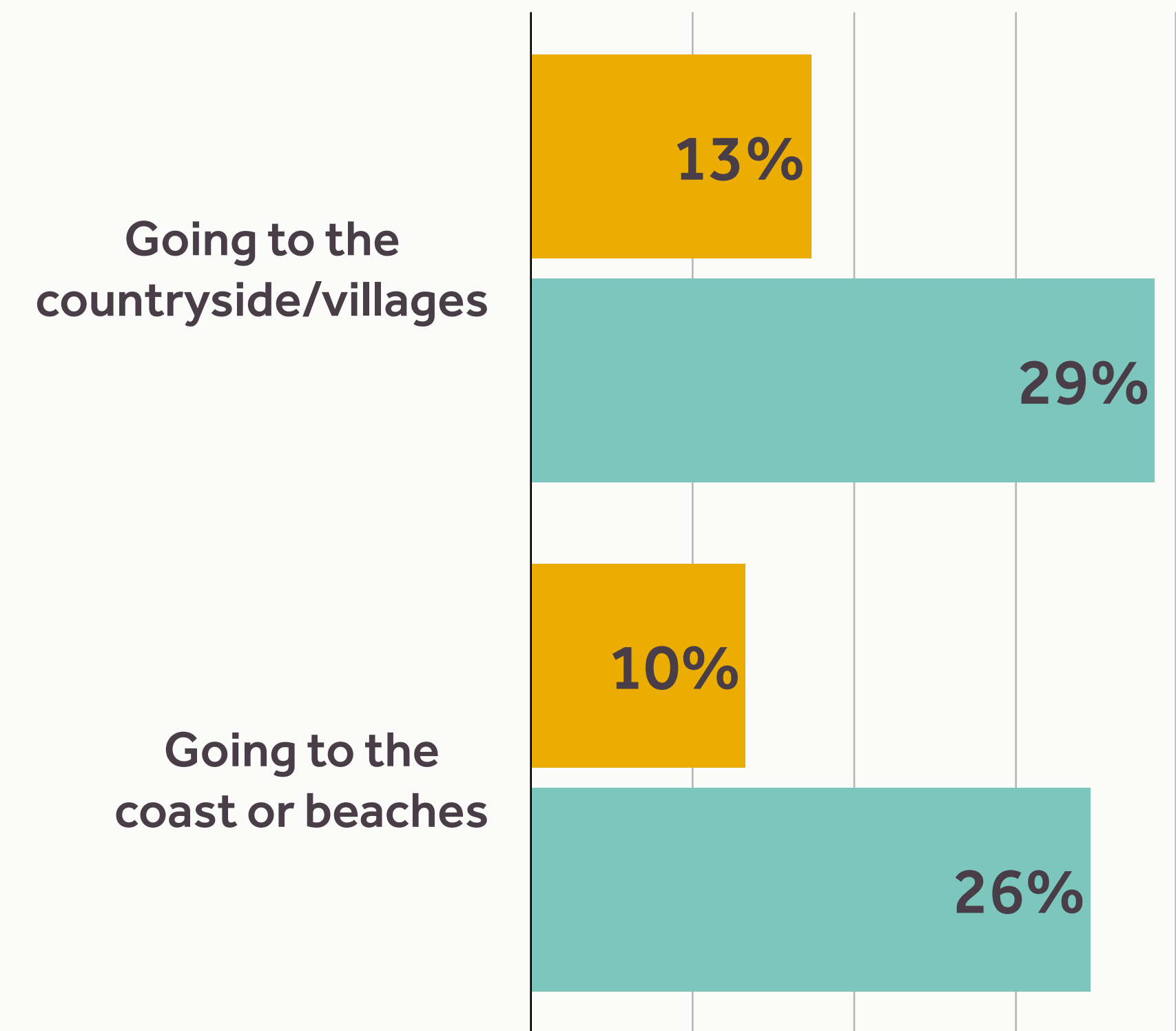
03 Experiential Tourism Trends

In the most recent VisitBritain insight report on activities in Britain's nations and regions (2019), we see that the South West region, performs well above the rest of the UK in rural life and scenery including visits to the coast, countryside and villages. Outdoor leisure pursuits such as walking are also popular.

OUTDOOR LEISURE PURSUITS



EXPERIENCING RURAL LIFE AND SCENERY



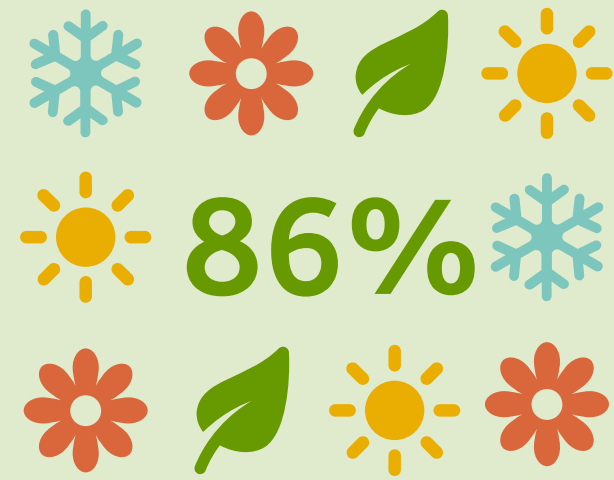
■ Total UK ■ South West Only

Source: VisitBritain, Activities in Britain's nations and regions research 2019

REPEAT VISITORS

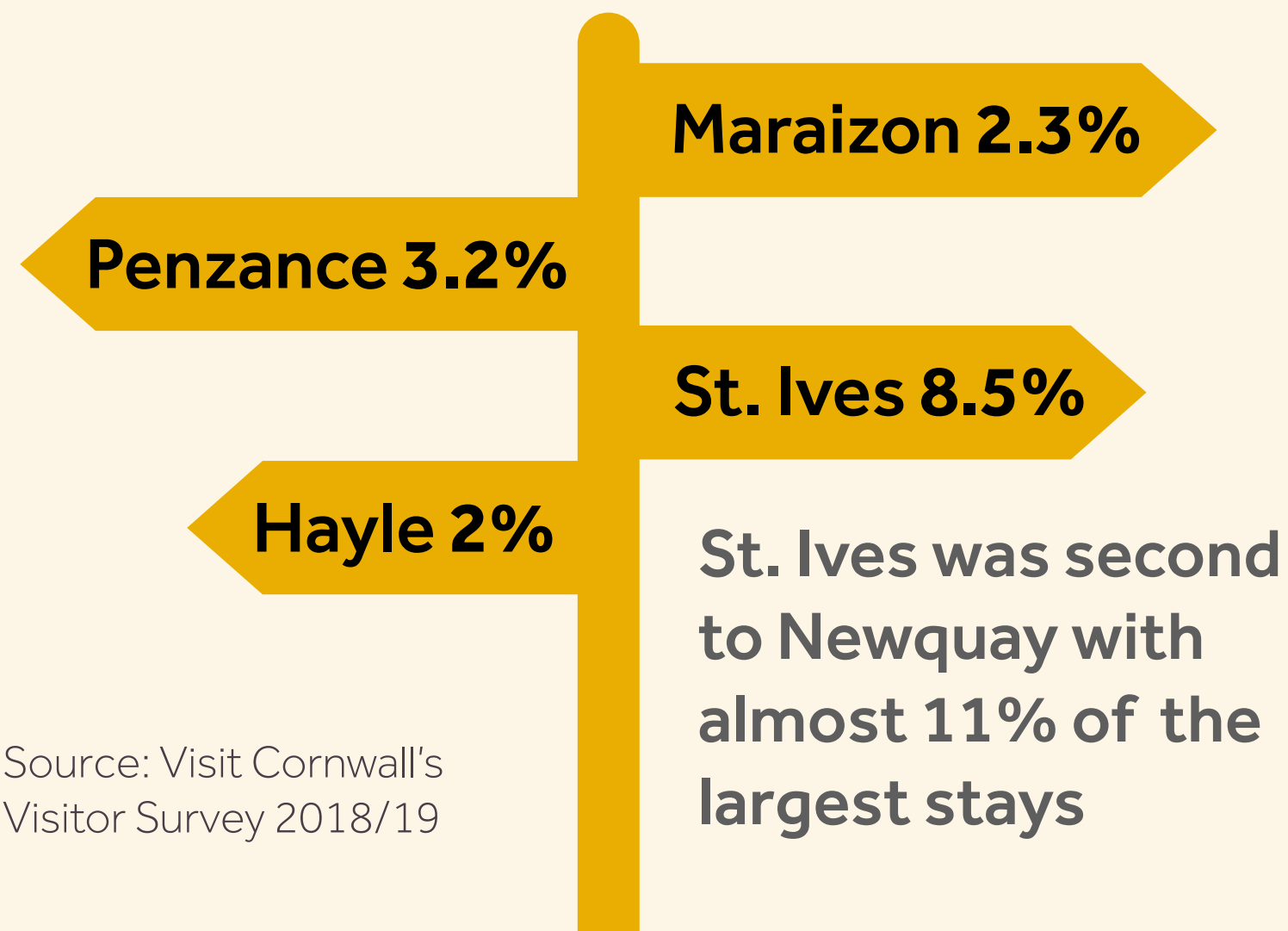


55%
of visitors
returned to
West Cornwall
after 1-2 years



86%
of repeat
visitors return
at a different
time of the year

WHERE VISITORS CHOOSE TO STAY 2018/19



St. Ives was second
to Newquay with
almost 11% of the
largest stays

Source: Visit Cornwall's
Visitor Survey 2018/19

WEST CORNWALL ACCOMMODATION



46%
Self catering



26%
Hotel/B&B



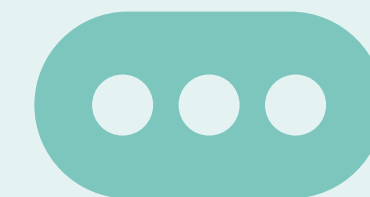
11%
Holiday park



5%
Camping



3%
Second home



11%
Other

Average length of stay: 6 - 7 nights



OVERNIGHTERS



DOMESTIC AND INBOUND VISITORS

WEST CORNWALL



68% Domestic



19% Domestic from the
South West



13% Inbound

03 Experiential Tourism Trends

Trends that resonate with the Penzance experiential product offer

Life changing experiences

More and more visitors are looking for life changing experiences, a trend often referred to as transformative travel (or TT). Transformative travel aims to change a person and has positive, long term impacts on people's lives, but also where they are also visiting, increasing our collective awareness of how we impact the world.

Examples of this kind of experience could include a guided walk through Marazion Marsh nature reserve to learn about the largest freshwater reed bed in Europe, joining a beach clean, or learning about the unnecessary plastic culture or discovering the concept of permaculture.

Full of stories and full of life

Every visitor experience should have a story that runs throughout – just like a book it should have a good start, middle and end. These stories should resonate with local people, landscapes, nature, history, heritage, culture, food and drink. This is also what makes an experience different to a tour; it's the story that continuously runs throughout linking all that resonates with that story.

An example of this kind of experience could be hearing from a fourth generation Newlyn fisherman while out at sea fishing, understanding the heritage of the fleet, how things are done now compared to what their ancestors did, before returning back to the harbour to enjoy a fish and chips supper.

Feel like a local

Connecting with locals doesn't happen through a guide book. One of the strongest of all drivers in developing visitor experiences is being immersed in local places, culture, and traditions, plus connecting with people who share their own stories, skills and life in their communities. Visitors should leave feeling inspired, with lasting memories and have a real understanding of how it feels to live life like a local.

An example of this kind of experience is spending a day with a Penzance artist, walking and cycling the area visiting the views they like to draw and paint, taking visitors into side streets with small independent shops that most visitors wouldn't know were there and having lunch while the artist introduces them to their friends.

Take a self-propelled journey

Visitors experience a place differently when their travel more slowly. Travelling on foot, by bike or in a kayak, you see more, soak up more; you can access out-of-the-way places, meet more local people. There's also a sense of freedom in being in charge of your pace, detours and destination. It's more the kind of travel associated with early explorers, with a sense of discovery to match.

An example of this kind of experience is discovering Mount's Bay at a slow pace on foot, by bike and in a kayak.

Learning something new

Providing visitors with engaging opportunities to challenge themselves to learn a language or new skill. Different visitors will want various levels from toe-dipping to total immersion but the overall principles always remain the same.

An example of this kind of experience is learning Cornish as visitors discover Penzance - or Pennsans as its known in Cornish - Holy Headland, visiting churches and understanding the town's rich history.

03 Experiential Tourism Trends

Explore by night

Spending a night under the stars or going on a night-time nature or coastal walk adventure is becoming more popular. Those who live in cities and larger towns might not get to see the dark skies that are above us.

More hands-on please...

Visitors are looking for more experiences that are hands-on activities where they aren't just learning something new — they're having a go; like making, baking and drawing.

Our planet

Visitors have become increasingly aware of their impact on our planet. This hasn't necessary changed their desires to travel or go on holiday, but it has raised lots of questions as to how they travel. Before Covid-19, rail-based travel has been on the rise, between eco-aware visitors seeking an alternative, car-less city dwellers, and independent travellers wanting a hassle free way to get around. But it's not just while visitors are staying in the destination, they also want to use more sustainable ways to get about, like hiring bikes and using public transport. In 2019, booking.com reported that 76% of the Gen Z travellers look to use more environmentally friendly means of transport once they have arrived at their destination.

Eat Local

The most popular visitor experiences on TripAdvisor/Viator and Airbnb are foodie experiences. As we already covered; connecting with locals doesn't happen through a guide book, but it can through eating with locals and having a culinary experience. There's nothing more social than eating out, and now you can even dine at a local's home when booking through sites such as eatwith.com and BonAppetour, which are devoted to experiences that facilitate eating with locals. Using locally sourced food and drink in an experience will connect the stories of the landscape, producers and farmers.

Other global trends include; eating seasonally when you travel, go epic on your doorstep, reconnect with family and friends, reconnect with nature, seek out a spiritual place and do something for the first time.



Image: Penzance Promenade - Golowan Flags on display

Sources: Wanderlust - 25 enriching travel experiences that will change your life (2018), Transform Me Travel - About the Transformative Travel Trend (2020), Forbes - About the Transformative Travel Trend (2017).

04 Bookability & the Tourism Distribution Landscape

Being 'bookable'

If your tourism product is not online, then it's going to be very difficult for visitors firstly to know you exist and to book.

In recent years there's been a lot of talk about being 'bookable'. But what does being 'bookable' really mean?

- The product is available to be easily booked in advance. It isn't just available to those customers who turn up on the day;
- It can be built into an itinerary delivered and sold by a tour operator (business to business sales);
- It could be sold directly to the customer (business to consumer sales).



87%

of visitors to Cornwall use the internet to book accommodation, rail tickets and events. 13% use it for only sourcing information



64%

of visitors to Cornwall used Google to find accommodation

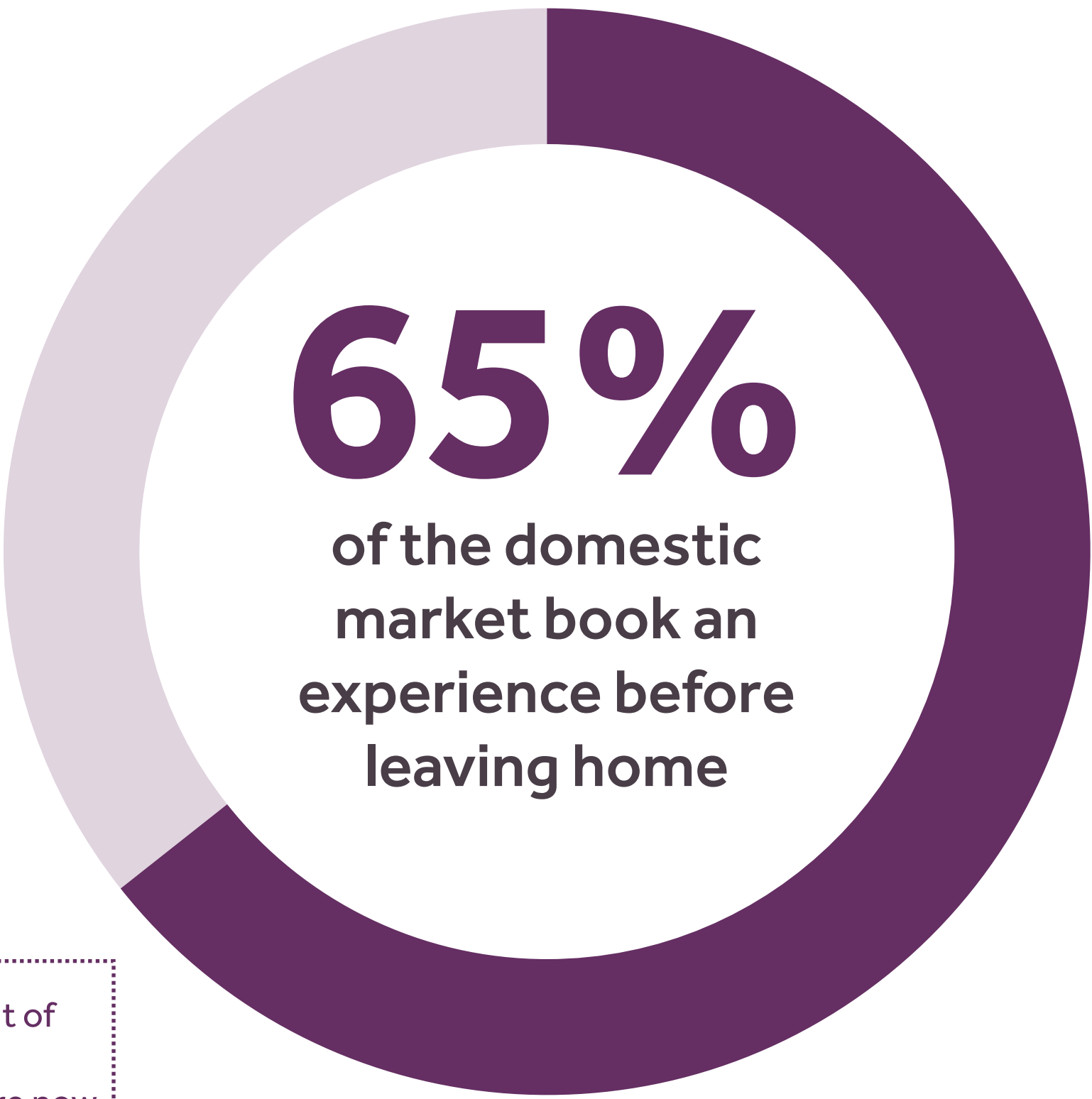
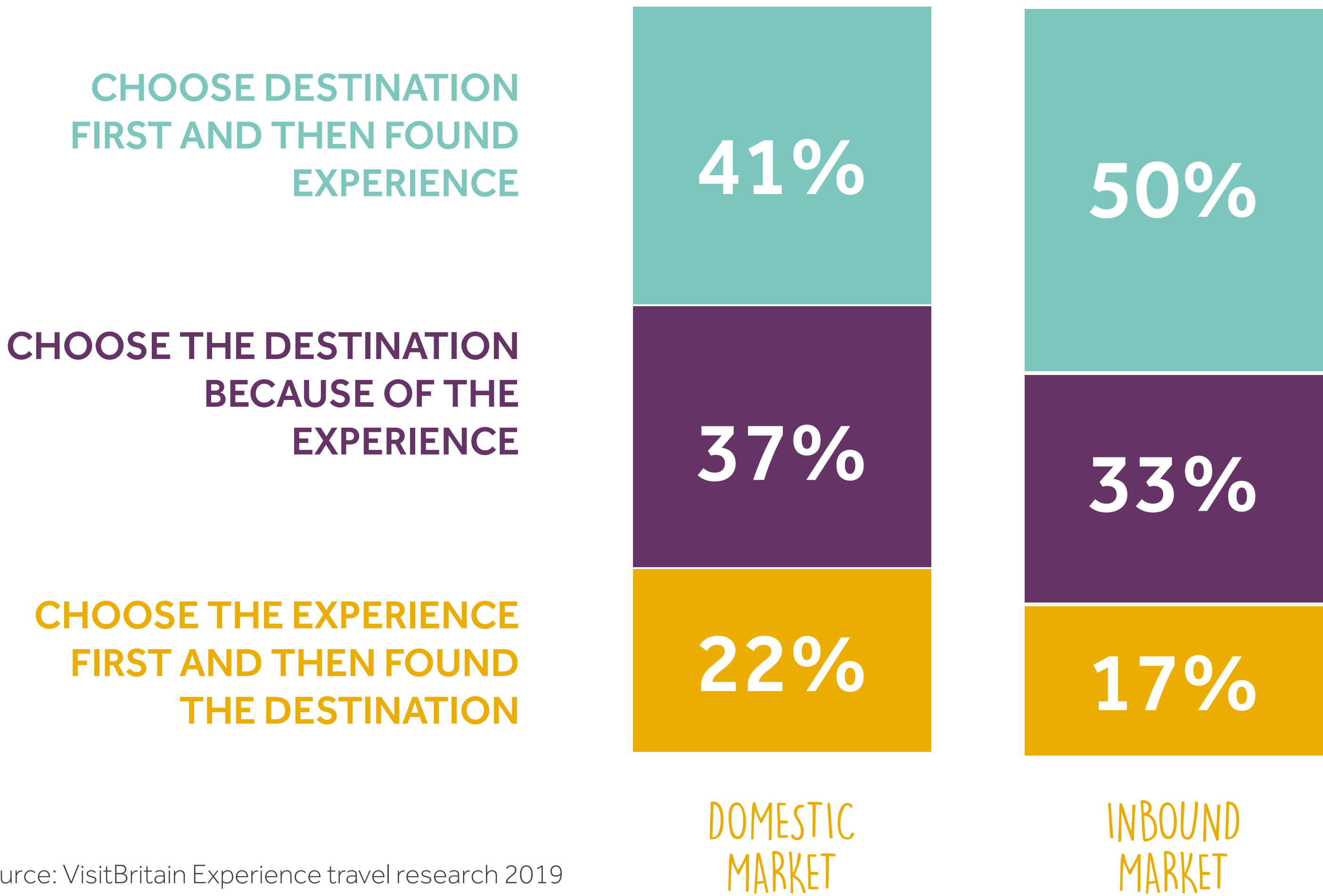
Accommodation providers can play a key role in new itineraries

04 Bookability & the Tourism Distribution Landscape



Influence of experience holiday destinations in Britain

Nearly 60% of the domestic market are influenced by an experience when selecting a destination.



As a result of Covid-19 visitors are now having to book before they travel.

BOOKING IN ADVANCE

Half of inbound travellers and two-thirds of domestic travellers book activities before they leave home.

Source: VisitBritain Experience travel research 2019

04 Bookability & the Tourism Distribution Landscape

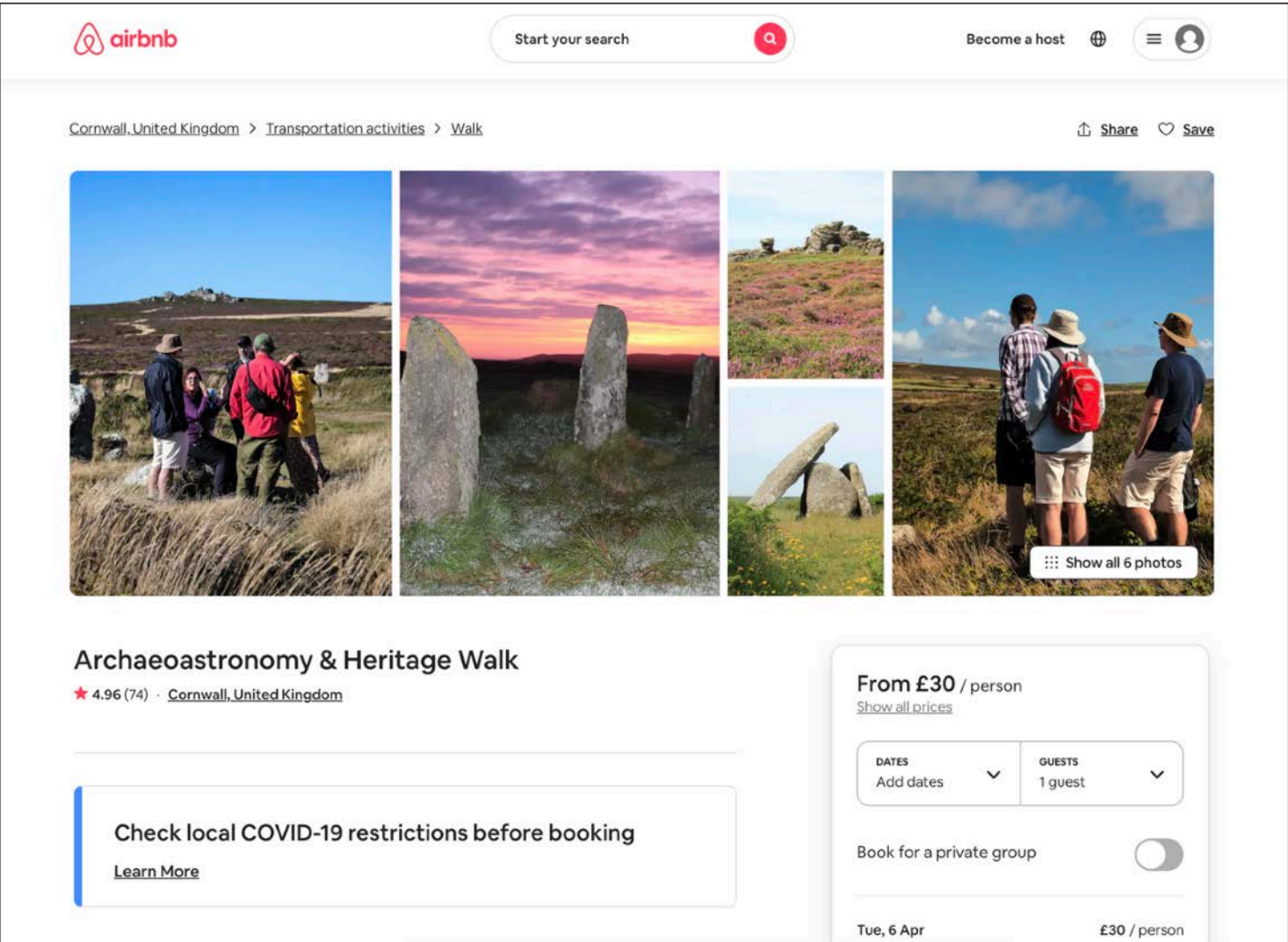


Where visitors book: Airbnb Experiences

Since its launch in 2016, experiences on Airbnb have helped travellers immerse themselves in local communities, by offering them one-of-a-kind experiences, carefully curated by local experts.

Airbnb states on their website that their experiences are “an antidote to mass produced tourism, enabling travellers to experience a different and authentic side of a city through the local people.”

The platform has gained new experiences across regional England over the past 2 to 3 years, but continues to focus mainly on urban locations currently. Airbnb has been keen to develop their offer across regional England, but sites like Visit Cornwall have been on their toes working with Beyonk to distribute bookable experiences.



66 experience products
in Cornwall

3 of these are on the outskirts of Penzance

Airbnb Experience's Offer

Exclusive:	Yes
Market:	Domestic/Global
Commission rate:	20%

Airbnb Accommodation

20% of visitors stated that they used accommodation providers' websites when booking, a decrease of 12% compared with 2017/18 whilst, in contrast, 10% had used the Airbnb.co.uk an increase of 4% compared with 2017/18 (6%).

Source: Visit Cornwall
Visitor Survey 2018/19

Visit Cornwall also has **66** experience products on it's website via Beyonk

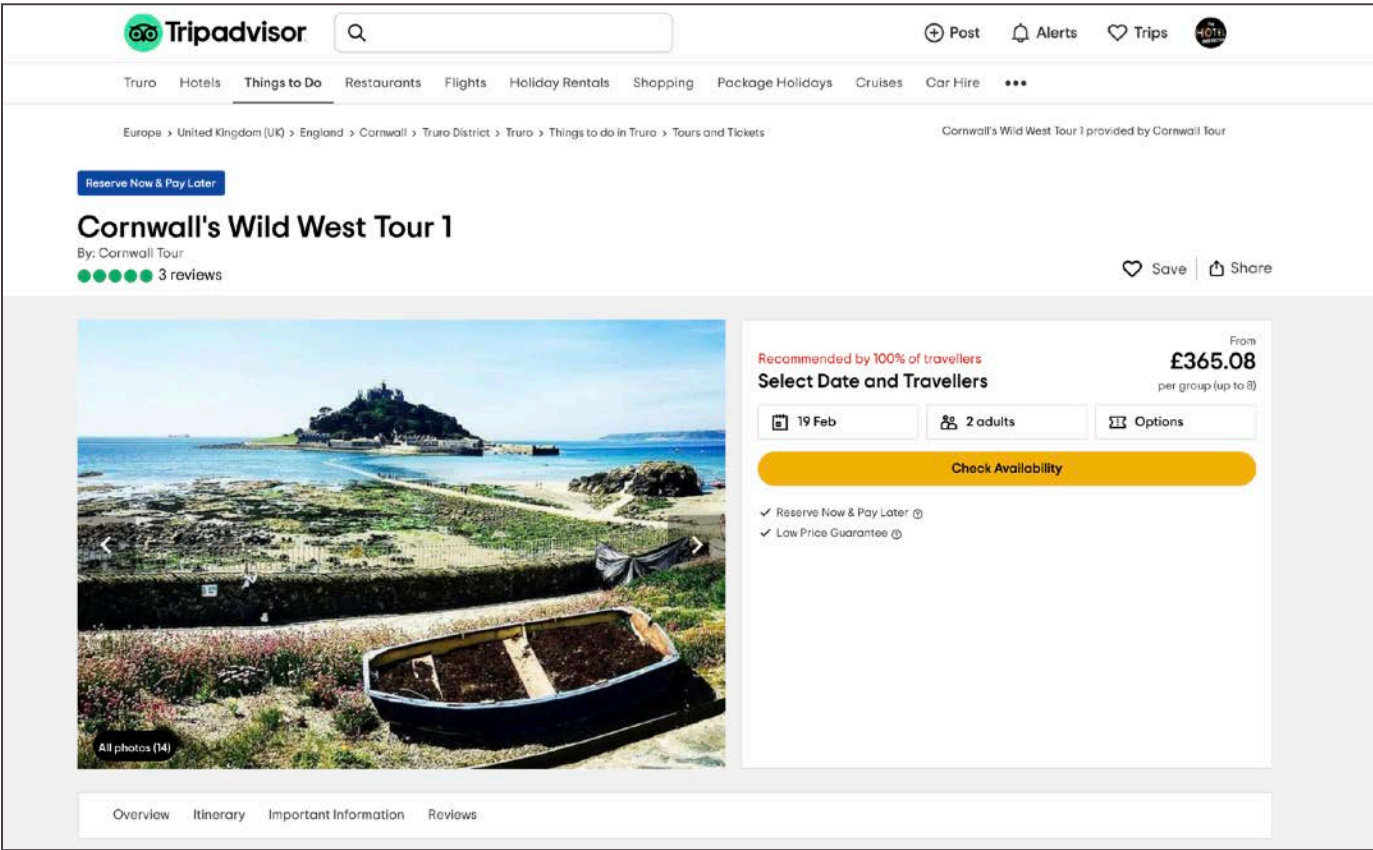
04 Bookability & the Tourism Distribution Landscape



Where visitors book: TripAdvisor/ Viator

Viator has a network of 390 million monthly travel planners (including TripAdvisor visitors) and 3,500 global affiliate partner websites, including major online travel agencies, airlines, and hotel groups.

The majority of products listed on both TripAdvisor and Viator in the ‘Thing’s To Do’ category lean towards tours rather than inservice hands-on experiences. Many of the products we found in our research were multi-day tours using mini-buses to drop into attractions or honey pot locations.

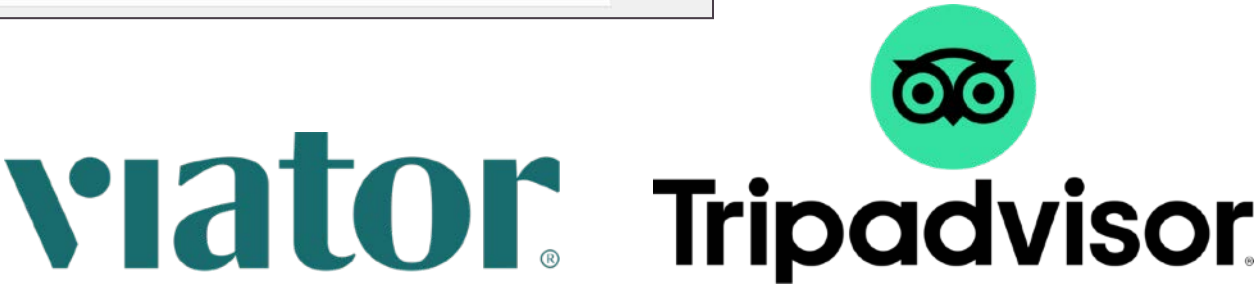


17 tour products
in Cornwall

4 of these take visitors
on to St Micheal's Mount

TripAdvisor's Experience's Offer

Exclusive:	No
Market:	Domestic/Global
Commission rate:	15% - 25%



Viator & TripAdvisor

Viator is an experience aggregator which searches across multiple OTA websites to obtain metadata and identify trends. They collate their statistics into their annual “The State of Online Travel Agencies” report and website.

In 2018, TripAdvisor’s non-hotel revenues saw a solid 27% year-on-year growth. Experiences and restaurants grew by 40%. The company continues to invest in its experiences business, and in 2018 it purchased Bokun, an Iceland-based technology provider for tours and experiences. As a result, TripAdvisor had a 60% increase in experience providers and 90% increase in bookable products in 2018.

Source: February 2020 platform research of TripAdvisor/ Viator platforms

Source: Medium - The State of Online Travel Agencies - 2019

04 Bookability & the Tourism Distribution Landscape



When VisitBritain last conducted its research on experiential travel, the following themes were the highest performing across both international and domestic visitor:

- Life behind the scenes;
- Distillery, brewery and vineyard tour & tasting;
- Food and drink;
- Guided nature walks and foraging;
- Photography, authentic crafts;
- Mindfulness and wellbeing.

Experiences already on offer

The following 8 experiences are currently in existence and bookable.



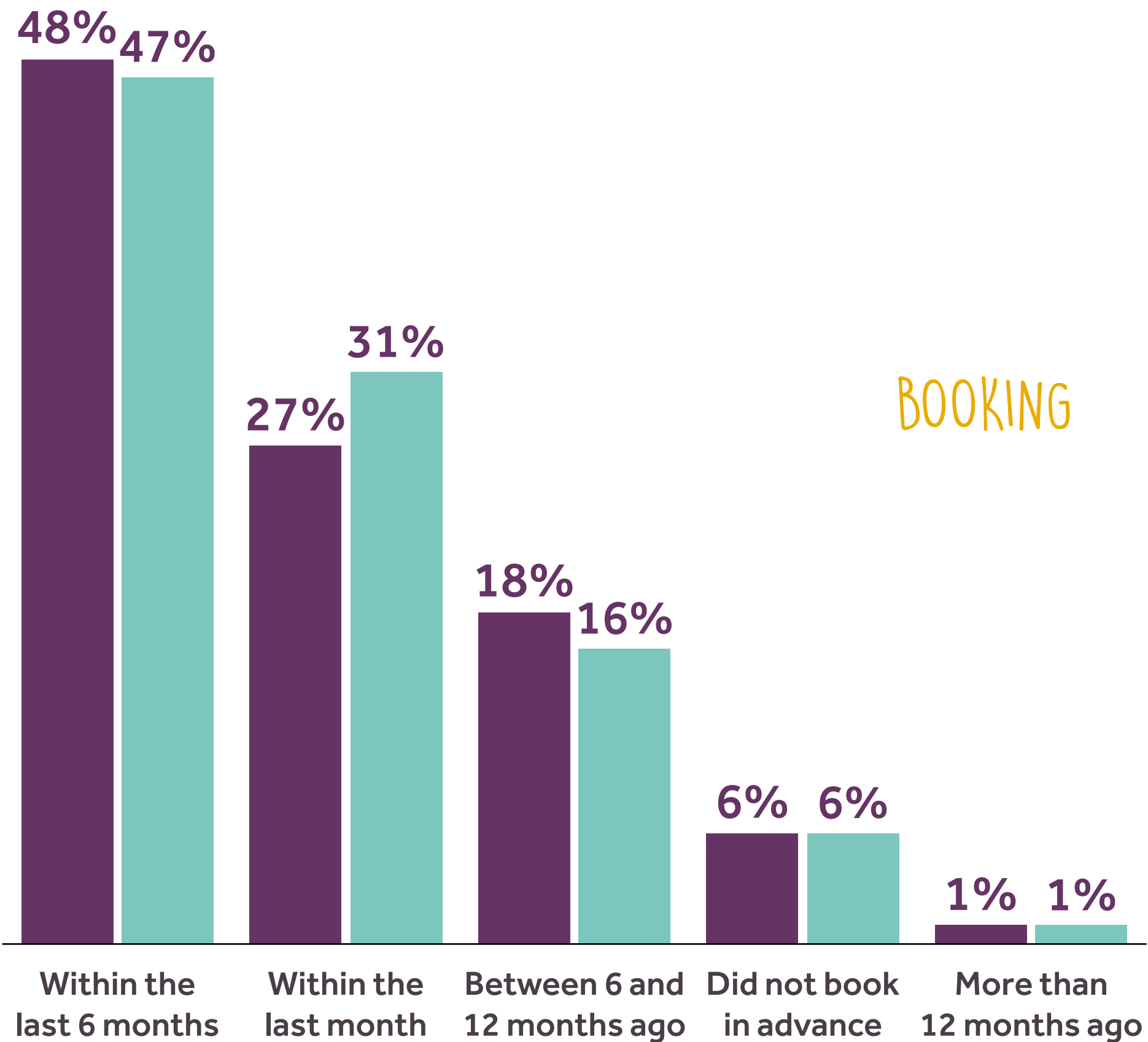
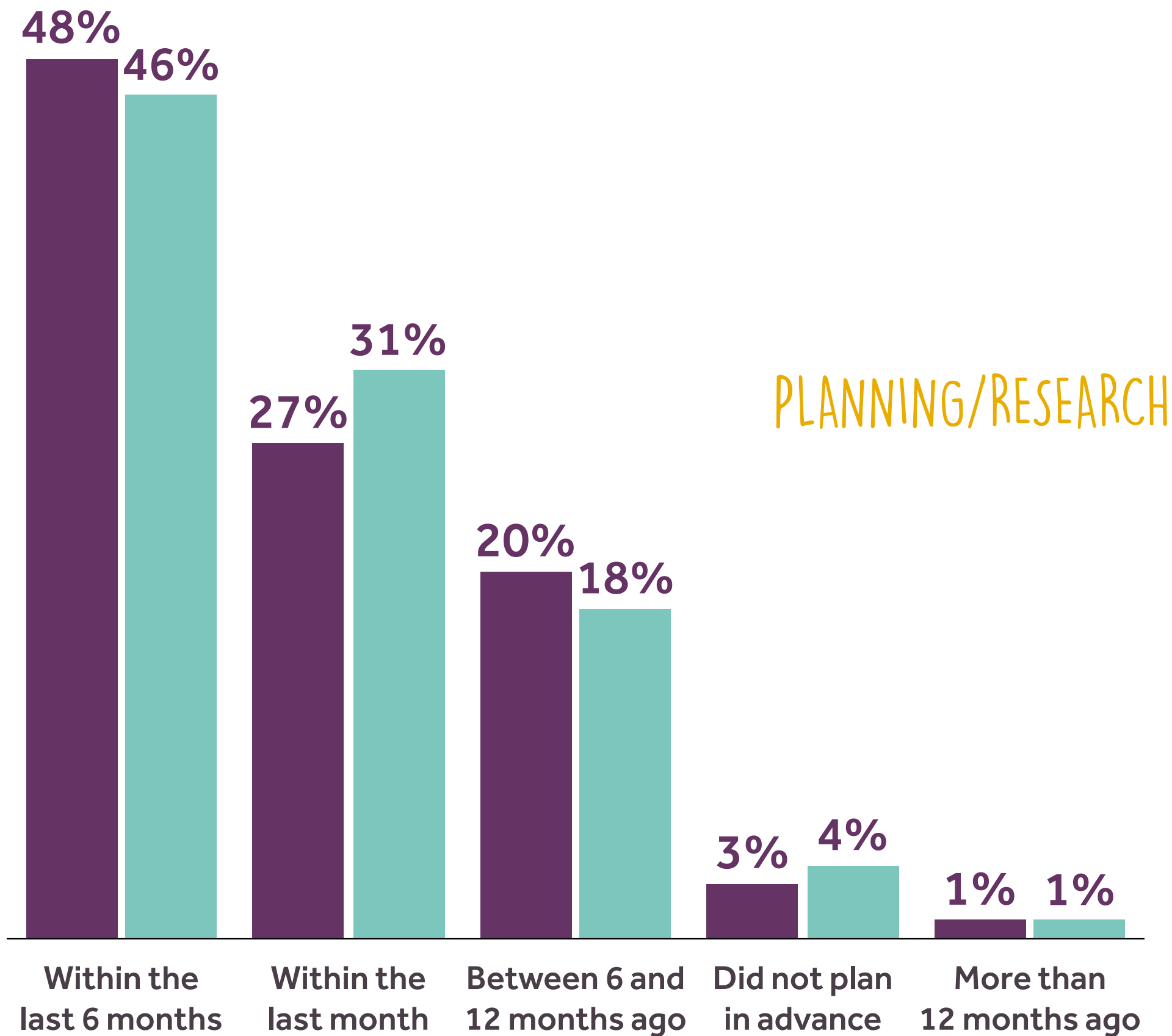
Key	Experience Name	Key Theme	Duration	Business	Distributed	Price per person	Starting Point/ Visiting	Group size
1	Ancient Cornwall a Bronze Age Walk	History	3 hours	Individual	Airbnb Experiences	£35	nr Bosiliack Barrow	8
2	Archaeoastronomy & Heritage Walk	Archaeoastronomy	2.5 hours	Individual	Airbnb Experiences	£30	Boswens Car Park	8
3	Half Day Rock Fishing Trip	Food & Drink	2 hours	Hook & Cook	Visit Cornwall	£25	Penzance Harbour	N/a
4	The Whole Adventure - Two Day	Food & Drink	2 days	Hook & Cook	Visit Cornwall	£225	Penzance Harbour	N/a
5	Cornish Coastal Walking Adventure	Walking/nature	6 days	Individual	Not in the Guidebooks	£1619	St Michaels Mount	6
6	Winter Vineyard Experience	Vineyard	3 hours	Polgoon Vineyard	Own Website	£15	Polgoon Vineyard	-
7	Wine & Theatre Night	Vineyard	4 hours	Cornish Wine Tours	Own Website	£75	Polgoon Vineyard/ Minack Theatre	13
8	Wild Medicine Foraging Walks	Foraging/nature	2.5 hours	Individual	Airbnb Experiences	£35	Marazion	10

04 Bookability & the Tourism Distribution Landscape



When visitors plan and book

Data shown here is for the whole of Cornwall, both domestic and inbound visitors, prior to the Covid-19 pandemic.



2018/19 2017/18

Source: Visit Cornwall's Visitor Survey 2018/19

04 Bookability & the Tourism Distribution Landscape



In order to succeed in an international market, it is important to tailor your experiences to your visitors’ requirements. By understanding how your region and product might appeal to the international market, you can tailor your product, marketing and promotional activities to attract new visitors.

The largest markets to the South West:	Netherlands	Germany	France	Spain	Australia
% share of nights to the South West (UK)	15%	13%	13%	10%	8%
Global ranking for inbound visits to the UK in 2019	#7	#3	#2	#5	#10
Key travel periods	July - Dec	April - Dec	April - Dec	April - July	July - Sept
Key booking periods	68% of Dutch visitors started thinking about their trip 3 or more months before their arrival in Britain	6 months+ Germans tend to start thinking about their trip to Britain early	>50% of French visitors booked within two months of their arrival in Britain	>60% of Spanish visitors booked within two months of their arrival in Britain	Over half of Australian visitors had decided for Britain as their holiday destination 6 months or more before their trip
VisitBritain’s global audience targeted segments	Buzzseekers Explorers	Buzzseekers Explorers	Buzzseekers Explorers	Buzzseekers Explorers	Buzzseekers Explorers

Target Segments

Buzzseekers

Free spirited and spontaneous, they like holidays full of action and excitement.

Aged 25 -34

Explorers

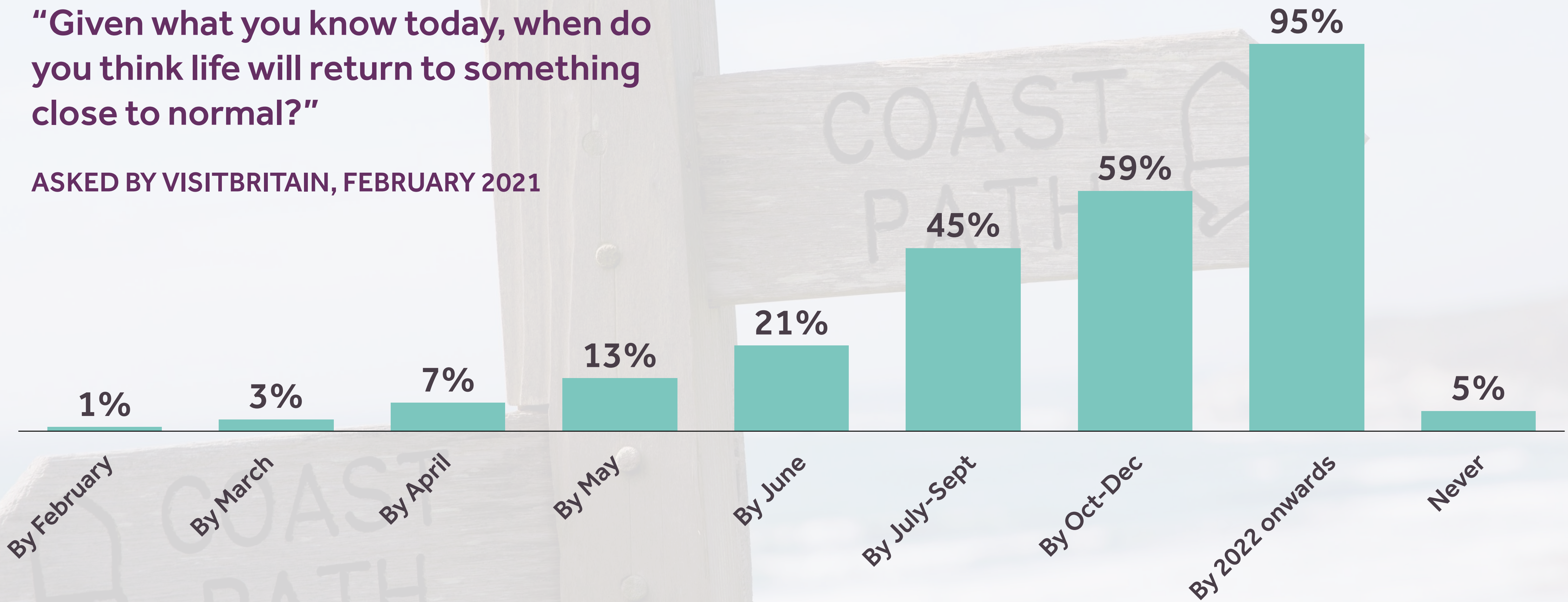
They enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace.

Aged 45 - 64

04 Bookability & the Tourism Distribution Landscape

“Given what you know today, when do you think life will return to something close to normal?”

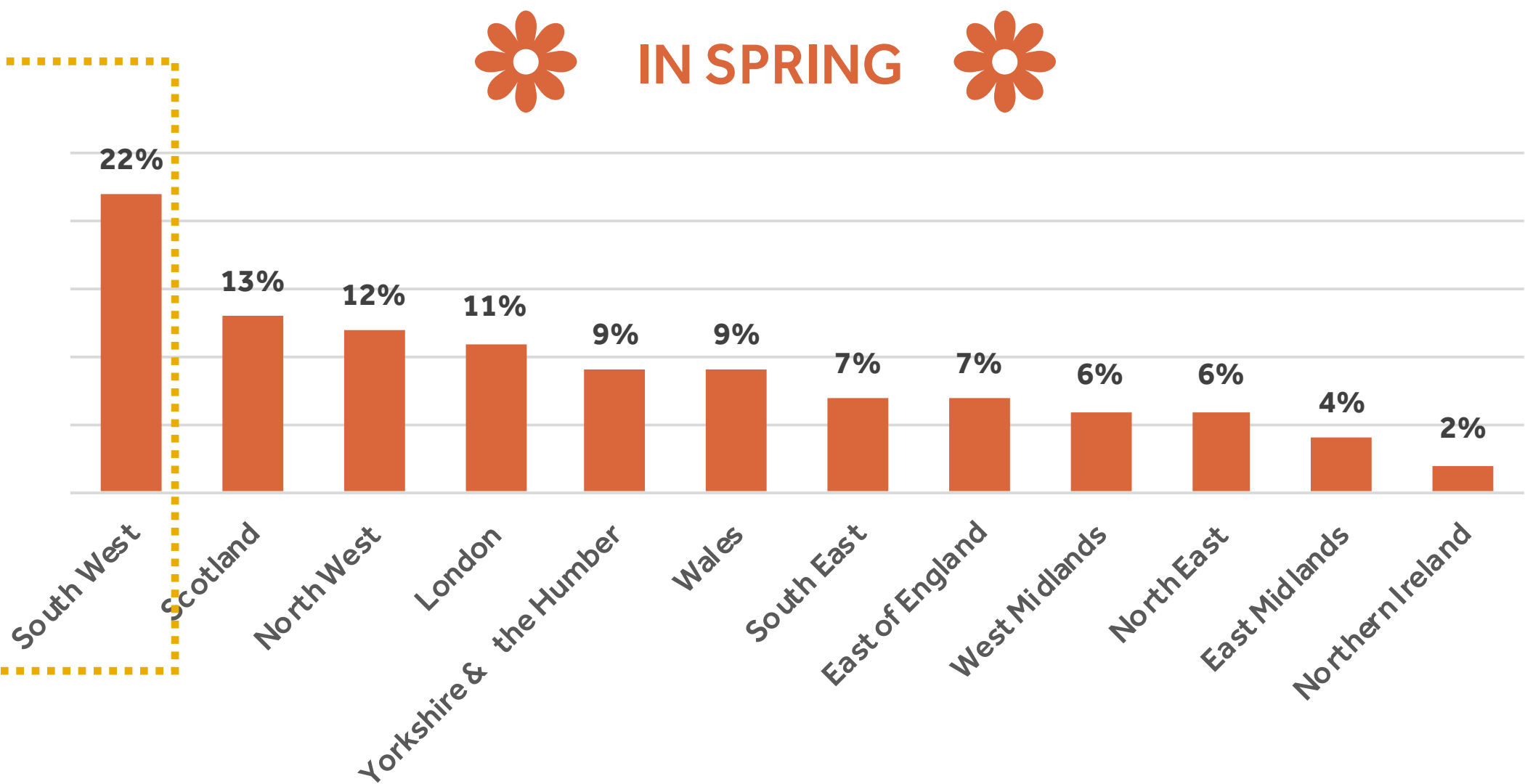
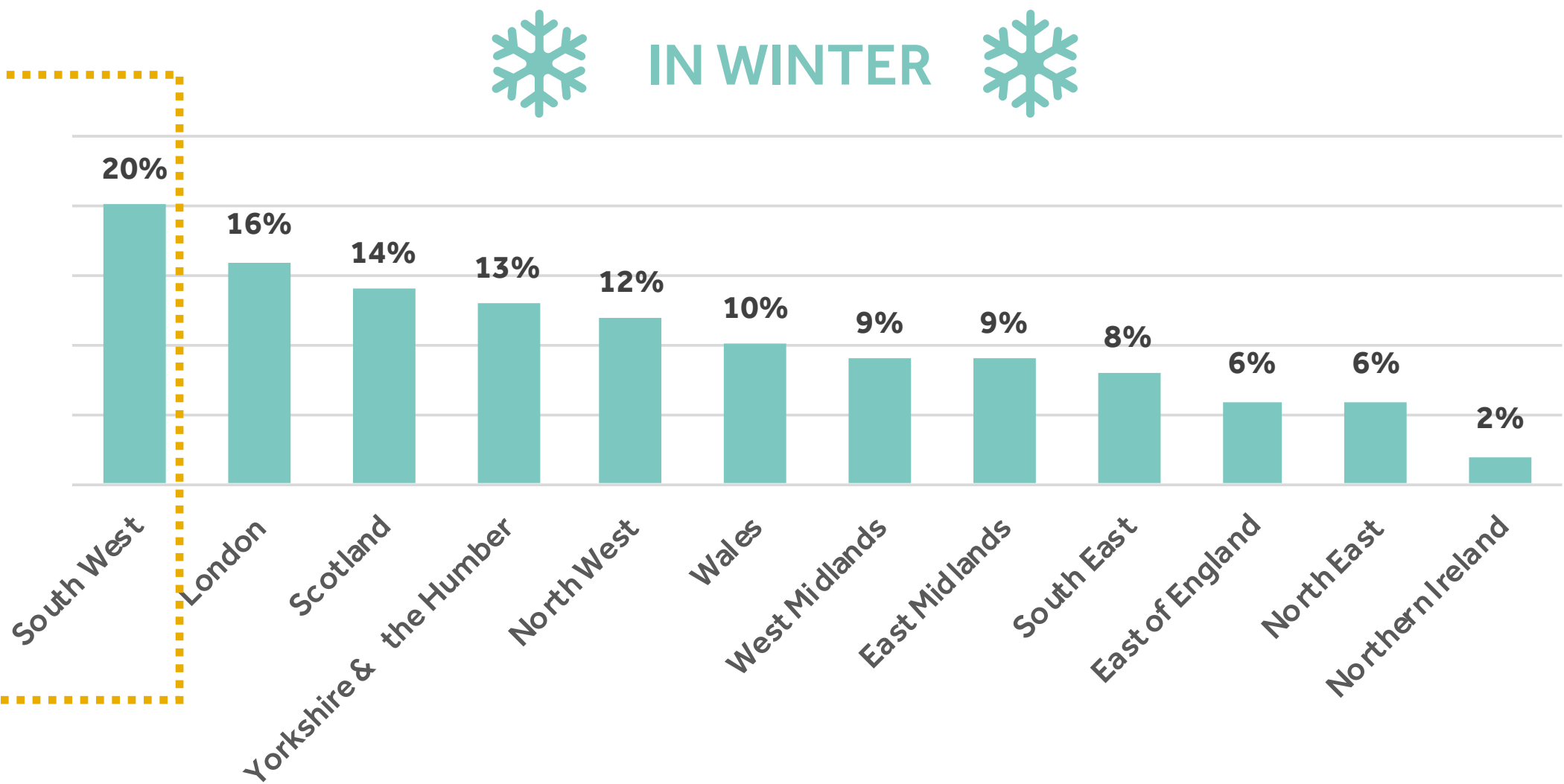
ASKED BY VISITBRITAIN, FEBRUARY 2021



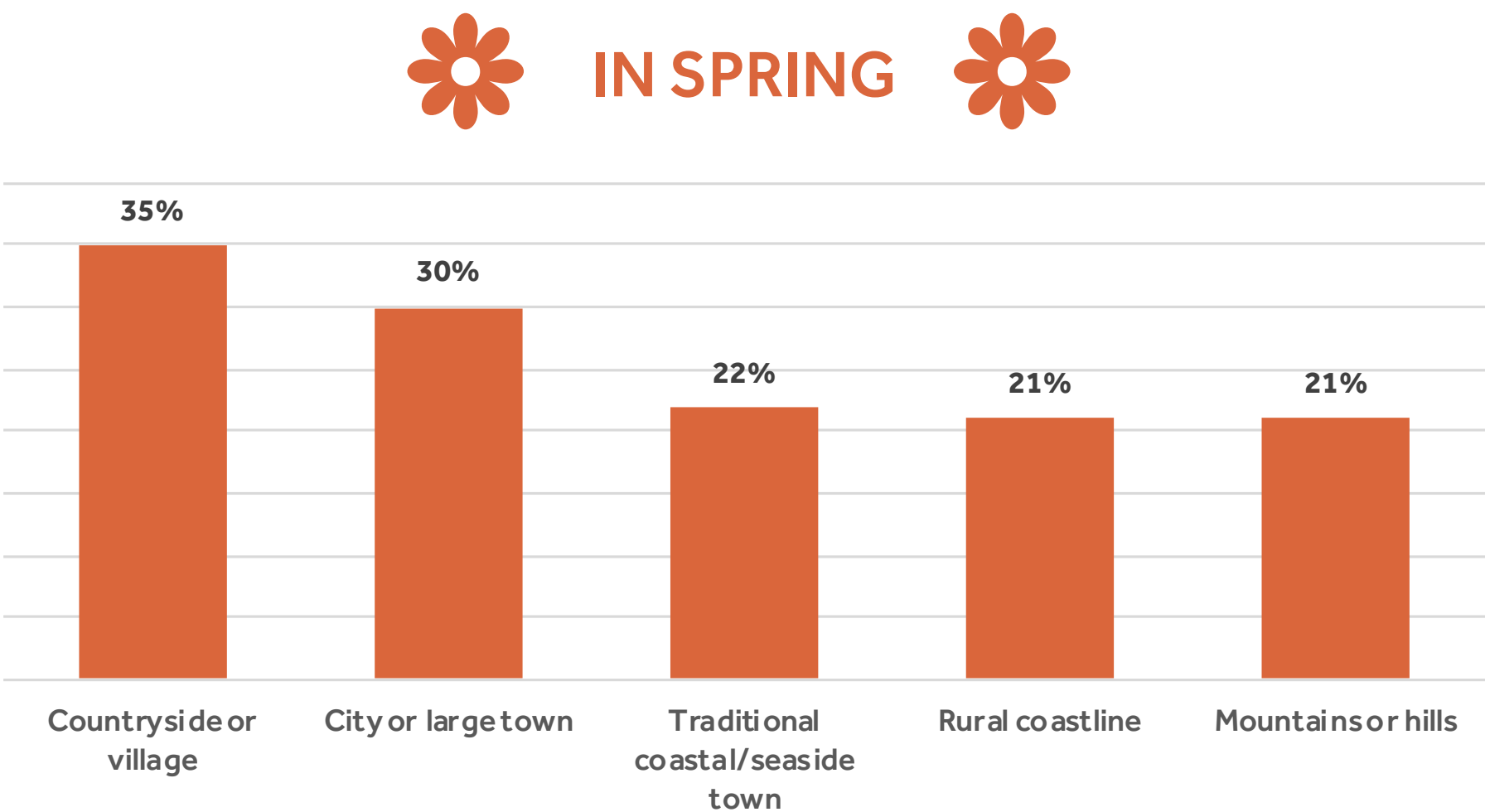
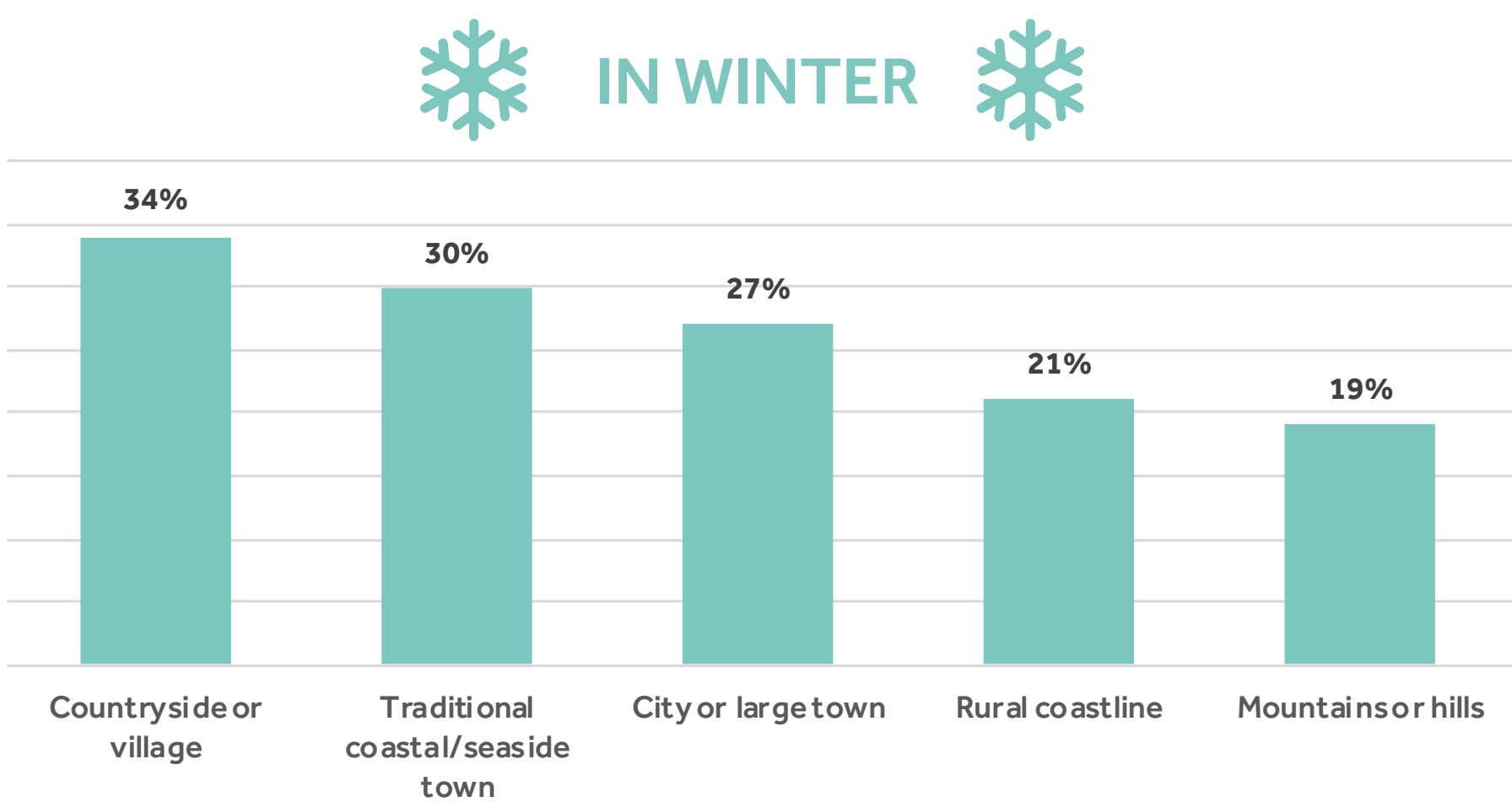
04 Bookability & the Tourism Distribution Landscape



WHERE PLANNING ON STAYING ON NEXT UK OVERNIGHT TRIP



TYPE OF DESTINATION FOR NEXT UK OVERNIGHT TRIP TO THE SOUTH WEST



❄️ 🌸

In VisitBritain's Covid-19 recovery research, the South West is the leading destination for an overnight stay in both the winter and spring time periods, with a particularly dominant position for the latter.

05 Product opportunity

Key assets/resources mapping

Analysis of OTA's and DMO sites we have identified key assets and resources in the Penzance and surrounding areas. This mirrors the current product offer in the area.

GREEN: Gardens, countryside, farms, nature reserve

YELLOW: Shops & restaurants using locally sourced/produced, markets, vineyard

ORANGE: South West Coast Path/ new arts trail, camping sites, picnic sites, trails

PURPLE: Art galleries, studios, theatres, filmhouse, museums, heritage sites

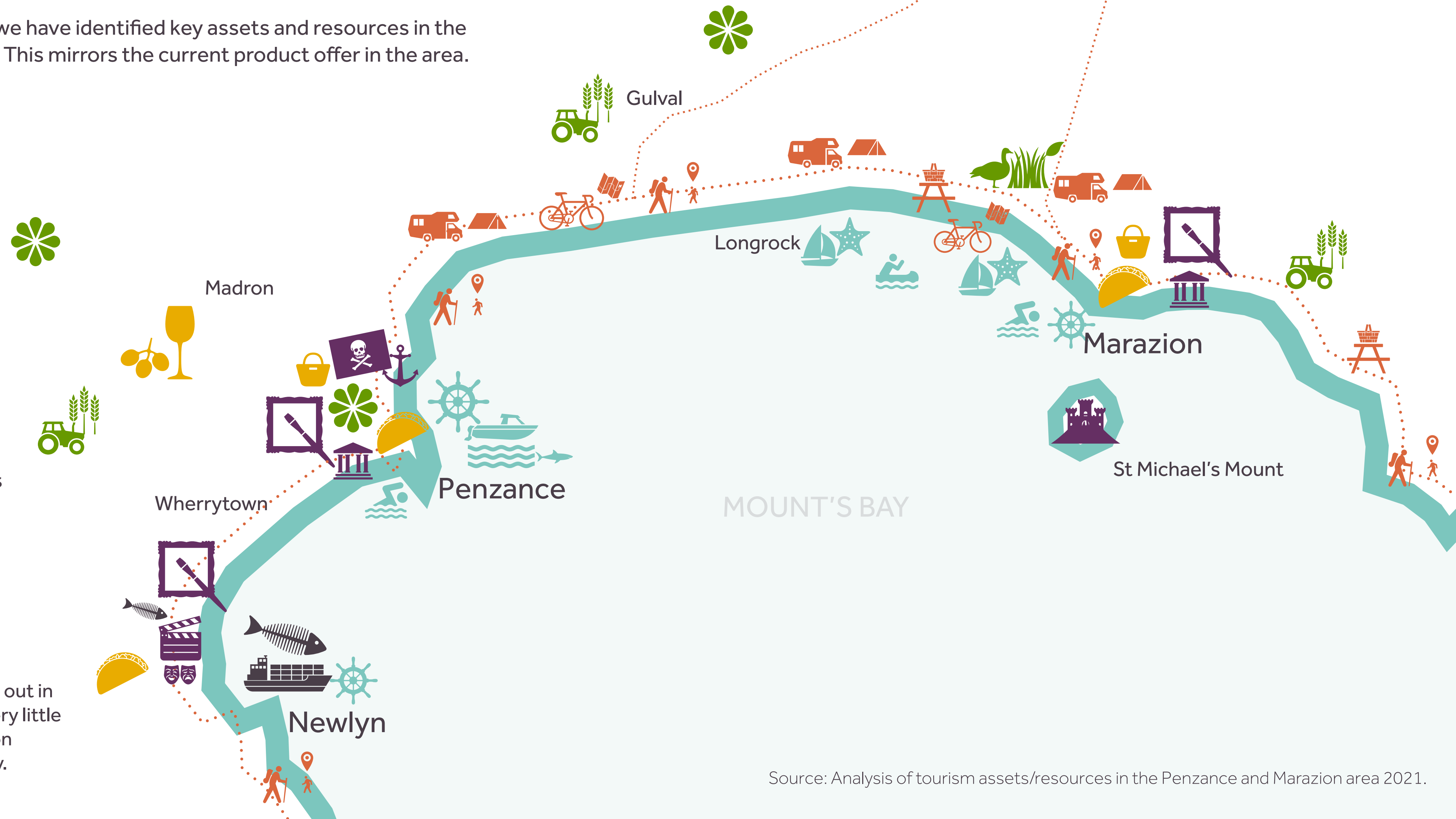
TEAL: Boat trips, swimming, water-sports, beaches, harbours

GREY: Fisheries, fishing heritage



In all of the analysis carried out in this report, the area has very little out of the 'standard' season products on offer currently.

Accommodation providers are key when building new itineraries of experiences across this area.

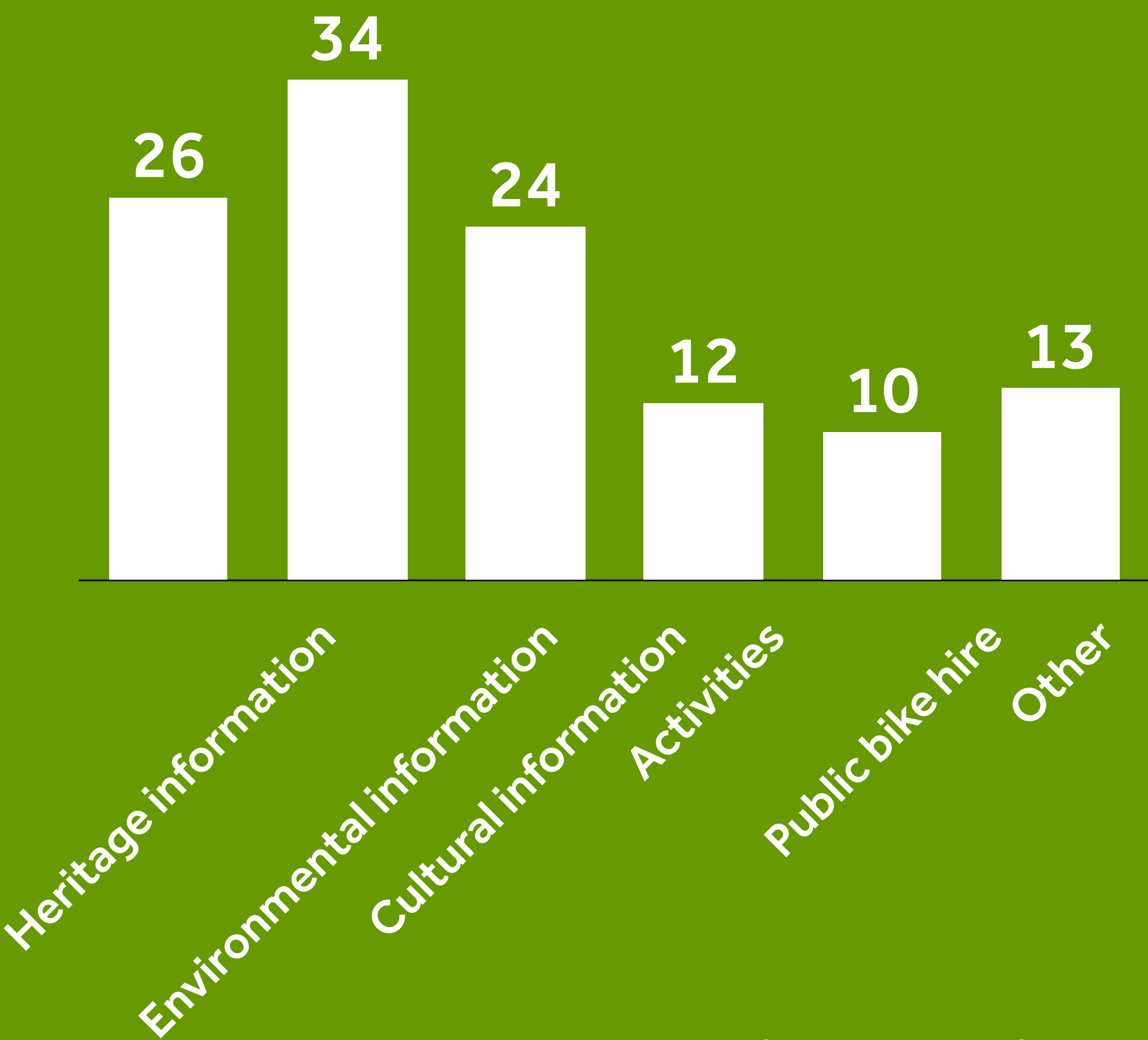


Source: Analysis of tourism assets/resources in the Penzance and Marazion area 2021.

05 Product opportunity

“Would you like to see any of the following improvements to the Mount’s Bay coastal path?”

ASKED TO A PENZANCE NETWORK FOCUS GROUP

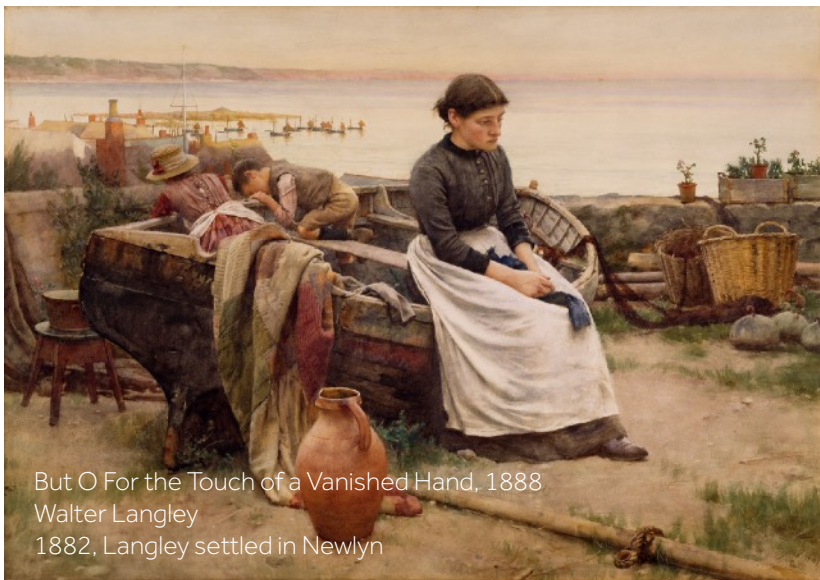
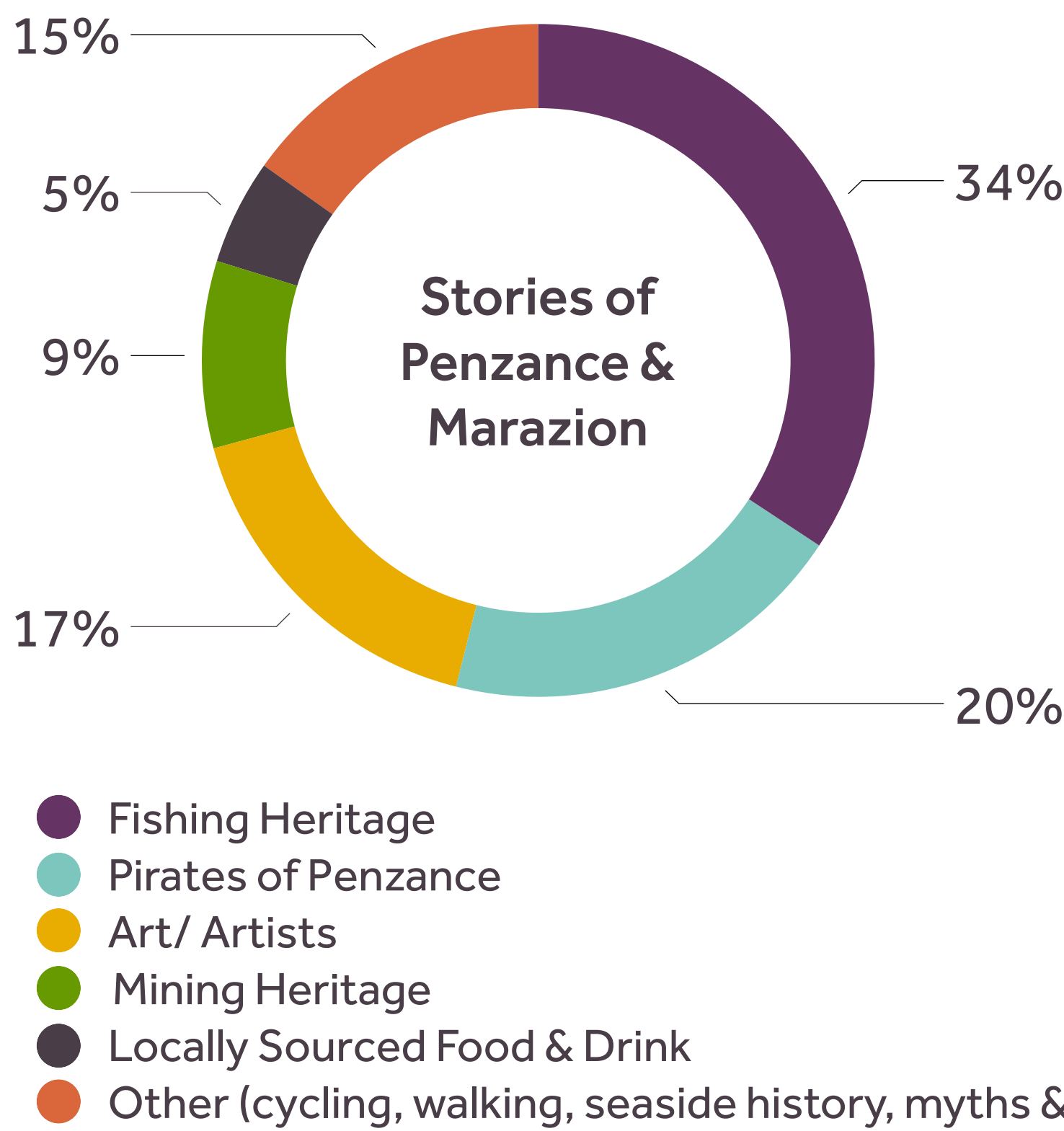


Source: EXPERIENCE Penzance and Marazion 2020



Identifying the stories

In a recent poll, Newlyn’s fishing heritage, the witty comedy of Pirates of Penzance, followed by areas art and artists where chosen as the most popular stories.



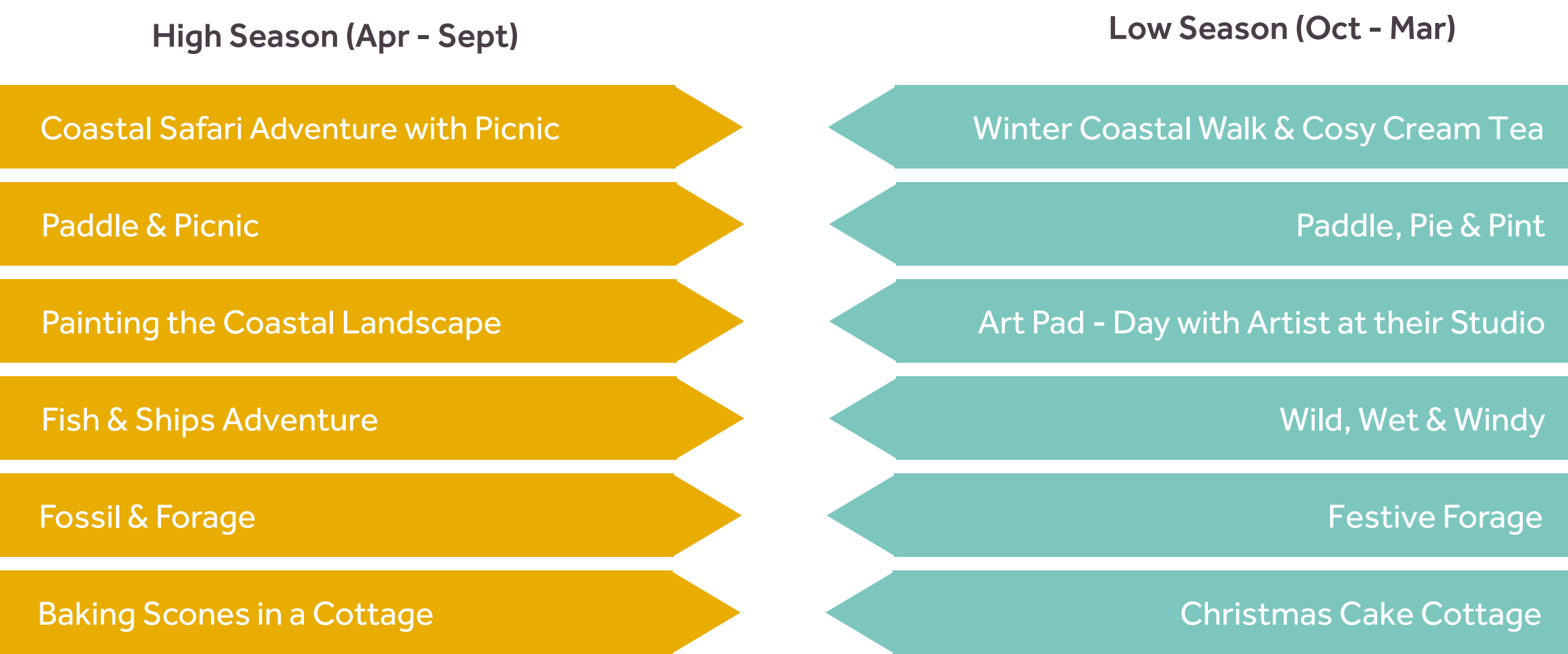
Question to 180 group members: Which of the following do you think visitors might like to find out, or discover about the town and local area they didn't know?

Source: Nostalgic Penzance and Newlyn Facebook Group, February 2021

05 Product opportunity

Experiences for all seasons

There are many strategies that are used to address the effects of seasonality and there’s plenty of opportunities to see these as a positive for growth. The chart below shows how businesses can divert their experiences developing on the season.



Source: Unmissable England

At both the destination and product level, there are several general strategies that are used, including:

- Diversifying the experience as shown in the chart above;
- Seasonal price variation; pricing to attract a target market or segment;
- Market diversification - e.g. target different markets for different seasons;
- Incentives for a particular target market.

Source: Low Season Traveller, Seasonality in Tourism Industry: Impacts and Strategies - CRC for Sustainable Tourism Pty Ltd.



Who likes to travel in the low season?

- Low season tourism is for those with a true sense of adventure;
- For those that dare to think a little differently;
- For those who have a spirit of adventure, courage, exploration and enlightenment;
- For those who travel to seek genuinely new experiences and want to return with stories to tell of their discoveries;
- We are for those who quite literally, go against the flow of the crowd.

Market diversification - low season inbound markets

Inbound visitors from the Irish Republic and Spain tend to travel to the UK between January and March (and July to September).

Segments

Young nesters, mature explorers, and some buzzseekers like to travel all year round.

06 Strength, Opportunity & Gap Analysis

We’ve conducted the following piece of research in the Penzance and Marazion area, on the resources/assets with the current related product offer with number of assets with opportunities to develop new experiential products and highlighting any gaps.






Likely to be recognised locally but without any products






Has a strong identity but little product on offer



The product offer is already established & has strong identity

Asset/Resource	Current Product Offer	Current number of assets	Strength	Opportunity	Gap
Artists & Art Galleries	Newlyn Art Gallery exists because of a long history of contemporary art making in the far west of Cornwall and has celebrated contemporary art and supported the artists that produce it for 125 years. The Exchange is a major contemporary art space occupying the former Penzance telephone exchange. Other art venues include Penlee House Gallery, Jupiter Gallery, Riverbank Gallery and Coddiwomple all offering various exhibitions and events throughout the year.	5 (Galleries)		Opportunities to branch out into experiences during the low season, linking into the new arts trail. Low season: spend a day with an artist in their studio.	Link exhibitions and events with year-round tourism products.
Arts Trail (new)	The brand new arts trail will create endless opportunities for the whole area, creating an artistic landmark in Cornwall that reflects contemporary and socially engaged approaches. It aims to create an iconic focal point for visitors to the path that deepens their connection with this place. The artworks will focus on sustainability and connect with local communities. It will also highlight the amazing location and its history. It will connect visitors with local cultural and natural assets, providing an opportunity for contemplation, reflection and engagement.	1		The development of the new arts trail will enhance the tourism offer and linking up businesses and asset along the trail in both Penzance and Marazion. Low season: Arty footsteps experience with local artist along the trail.	Currently a gap of any linked tourism products exist.
Coastline	Marazion beach is rated ‘Recommended’ by the Marine Conservation Society in its Good Beach Guide. Long Rock is a safe family beach at the Penzance end of sands that stretch around Mount's Bay to Marazion. Favoured with Penzance locals as it is the most easily accessible stretch of sandy beach from town. The Jubilee Pool offers open air swimming in a notable art deco pool built from 1935.	2		With the planned improvements of the coastal path between Penzance and Marazion, this aims to increase usage but also create a ‘go to attraction’ where experiences are linked. Low season: beach combing nature trail starting with beach clean.	Watersport activities already take place around the bay. There’s a gap in nature themed experiences on the beach.



06 Strength, Opportunity & Gap Analysis

Asset/Resource	Current Product Offer	Current number of assets	Strength	Opportunity	Gap
Cycling & Cycle Routes	Cornwall will host the first stretch of the Tour of Britain in September 2021, seeing riders travel 170 kilometres through the Cornish countryside, starting in Penzance and ending in Bodmin. There are a number of cycle hire businesses in the area included Lands End Cycle Hire based in Longrock.	3		Create new cycling products linking to the coast and cycle paths. Low season: Peddle, Peebles & Pint experience linking cycling with the coast and fish with a pint of Cornish ale.	No cycling products currently exist but the 3 cycle hire companies a based close to the coast are ideal to create new local products.
Footpaths & Trails	Mount's Bay is on the South West Coast Path National Trail - 1 of 15 national trails in the UK. The path is undergoing an upgrade that will provide walkers and cyclists with a new resurfaced path and a new link to take the route away from Longrock car park. A new arts trail will be developed, creating an artistic landmark in Cornwall that reflects contemporary and socially engaged approaches. There is over 7 miles of coastal path in the area. Away from the coast Penzance is surrounded by Cornwall's Area of Outstanding Natural Beauty, with many footpaths, bridleways connecting the town with its rural surround assets. Celtic Way starts from Mount's Bay and finishes 725 miles away in Pembrokeshire.	8 long distance paths		The Cornish Celtic Way is a new pilgrimage route from St Germans to St Michael's Mount, crossing the peninsula twice. It incorporates over 60 miles of the Cornish coastal path as well as two established pilgrimage routes: The Saints' Way and St. Michael's Way. Low season: targeting self-guided walk itineraries to feature new products with their itineraries.	Only a few walking tours and experiences are being offered in the area.
Gardens	There are 4 privately owned gardens in the area and several open access recreational gardens and ground run by the council. The private gardens include; Morrab Gardens (open all year), National Trust's Trewidden Garden and Trengwainton Garden, and Tremenheere Sculpture Garden.	4		Morrab Gardens already host garden tours along with the other gardens, these could be developed into experiences with collaboration between other businesses in the town. Low season: adding new festive and winter themed garden experiences and light show.	Mostly on offer are self-guided opportunities rather than guided experiences.

06 Strength, Opportunity & Gap Analysis

Asset/Resource	Current Product Offer	Current number of assets	Strength	Opportunity	Gap
Festivals	Penzance LitFest, Newlyn Fish Festival, Montol Festival - midwinter solstice, culminating in the main event, Montol Eve on December 21, Golowan Festival /Mazey Day- Midsummer celebrations, Quay Fair Day - Penzance harbour, St Piran's Day, Newlyn PZ Festival, Newlyn Harbour Lights and Marazion Follyfest.	9		<p>Festivals are of course seasons events, new products could be developed outside of the festival event that keeps the festival going through the year in new 'festival experiences'.</p> <p>Low season: Indoor and outdoor experience trails in multi venues.</p>	To link festivals with a year-round tourism product offer.
Theatre & Film	Newlyn Filmhouse is an award-winning, two screen, independent cinema providing mainstream and art house cinema. Located in a converted fish warehouse, the restaurant's seasonal menu offers a delicious selection of locally sourced produce. The Acorn is Penzance favourite affordable theatre for live music and performing arts with a reputation for innovative programming. Penlee Park Open Air Theatre is a unique outdoor theatre space that has celebrated Cornish, national and international performers since 1948. Based in Penzance, Bash Street Theatre is a tour company that has built an international reputation performing fast-moving, silent-comedy shows with live musical accompaniment. The Minack Theatre of course is a massive draw to the wider region.	4		<p>Theatre groups could develop new Experiences between show seasons working with smaller community groups and local residents.</p> <p>Low season: Bring the Minack Theatre to Penzance by developing outreach pop-up theatre shows.</p>	Actors in low season could host themed experiences.



06 Strength, Opportunity & Gap Analysis

Asset/Resource	Current Product Offer	Current number of assets	Strength	Opportunity	Gap
Heritage	Marazion and Penzance both have town museums. The Penlee House Gallery & Museum in Penzance contains important collections of works of art, archaeological artefacts and exhibits that reflect the history of West Cornwall and its people. Marazion has its own heritage self-guided town trail.	2		St Michael's Mount is well known both domestically and internationally bringing visitors in their droves that often are only visiting the mount and not accessing nearby tourism products. Low season: Create new experiences around the new arts trail linked to the	Likely to be a disconnected between those visiting the Mount and accessing other heritage venues in nearby Penzance.
Watersports	There are 4 watersport businesses along Mount's Bay mostly based in Marazion that offer a wide range of paddle board activities and services, from SUP fitness classes and lessons, SUP surfing, SUP activities including parties and corporate activities, and paddle board rentals. The Peep Out based at Longrock run 'swimming with horses' experiences. Wild swimming is popular along the coast and Jubilee Pool.	8		Traditional offer from 1:1 and group classes and lesson, that could be developed into more immersive experiences connecting wildlife and the landscape. Low season: Kite surfing experiences.	The opportunities with established businesses in the area can soon fill the gap.
Boat Trips & Excursions	Mermaid Pleasure Trips offer a series of boat trip from Penzance harbour, including fishing trips, tours around the island of St Michael's Mount and to the Minack Theatre which are marketed as wildlife tours to see cormorants, gannets, great black backed gulls and minky whales. There are a small handful of boat excursions from Penzance harbour also including; Marine Discovery and Atlantic Adventures.	3		Opportunity to further develop the boat trips into experiences working together with other businesses around the harbour. i.e. 'Fish and Ships' style experience. Low season: Boat trip adventures, target marketed at those with a spirit for adventure, exploration and enlightenment what ever the weather.	Small gap in the market for more experiential tourism offer.

06 Strength, Opportunity & Gap Analysis

Asset/Resource	Current Product Offer	Current number of assets	Strength	Opportunity	Gap
Environment	In 2017, Penzance became the first town in the UK to achieve the Surfers Against Sewage (SAS) Plastic Free Coastline status, later in 2018, Marazion became the thirteenth community. Both towns run an active campaign encouraging the community to minimise single use plastic. As part of Penzance wider Climate Emergency Plan, they have adopted a Plastic Free Event Charter for all events that they organise and support.	n/a		<p>There's so many connected opportunities with looking after the environment but there's only a small handful of ways currently for visitors to join in.</p> <p>Low season: Food and drink experiences that use seasonal ingredients and show how easy it is to reduce food waste.</p>	Plastic Free Penzance has a website to get residents involved - this could be expanded to get visitors to join in the efforts; ie. Experiences where litter collection from the beach plays a part.
Farming	A farming landscape surrounds the area with traditional farms and even a Christmas tree plantation.	6		<p>The farming landscape neighbours the area and connects with the area strong locally sourced food and drink offer and farmer's markets.</p> <p>Low season: Farming educational experiences for land managers, farmers, chefs, career changers, and students.</p>	Currently a gap of any linked farming/locally sourced tourism products existing.
Fishing	Newlyn has many fish and seafood businesses and has had annual fish festival. The town is well known domestically for its fishing. Newlyn's The Pilchard Works is well known nationally with its traditional looking tin designs of Newlyn and Mount's Bay. Hook and Cook already run a small series of experiences here.	n/a		<p>An untapped opportunity to connect the fishing industry to tourism.</p> <p>Low season: create new fishing experiences at sea and back on dry land to tell the story of Newlyn's industrial heritage and of its future.</p>	Collaboration opportunities with existing tourism businesses to fill the gap.

06 Strength, Opportunity & Gap Analysis

Asset/Resource	Current Product Offer	Current number of assets	Strength	Opportunity	Gap
Landscapes	Marazion Marsh is a RSPB nature reserve that is the largest freshwater reed bed in Europe and a stop off point for thousands of migratory birds. It is separated from the coast by a shingle bar and small sand dune system and contains Cornwall's largest reed bed. The Cornwall AONB surrounds Penzance and Marazion and is in walkable distance to access the special qualities of the landscape. The Peep Out based at Longrock run bespoke riding holidays.	n/a		<p>There is a diverse collection of landscape character types in the area that are yet to be connected with tourism products in the Penzance area.</p> <p>Low season: Create new walking and riding experiences starting and finishing in/near Penzance.</p>	Connecting Penzance and Nelwyn to its surrounding natural landscapes - e.g. 'surf and turf experience'.
Locally sourced food & drink	The Causewayhead in Penzance is the heart of independents shops and cafes providing a mix of locally sourced goods. The Shore and Harri's are both listed in the MICHELIN Guide and use high quality locally sourced. The Tolcarne Inn in Newlyn is well known for its catch of the day and quality fish which are brought in daily from just metres away. Hook and Cook already run a small series of experiences.	20		<p>The quality and the general awareness is known widely but there is plenty of opportunities to link with fishing, farming, into the local food stories of the area.</p> <p>Low season: Catch and cook experiences with local chefs.</p>	Currently very few linked farming/ locally sourced tourism products exist other than eating or shopping at a venue.

06 Strength, Opportunity & Gap Analysis

Asset/Resource	Current Product Offer	Current number of assets	Strength	Opportunity	Gap
Escape Rooms	There are 2 escape rooms in the area, one in Penzance and another in Newlyn.	2	★	<p>A growing trend nationally and potential local opportunities.</p> <p>Low season: Themed events and experiences linked into local festivals.</p>	No
Markets	Penzance has a new chartered market in the heart of the town that runs on the last Saturday of each month. There is also a co-operative country market that takes place in St John's Hall every Thursday and the Penzance Farmer's Market every Friday in Marketplace. Newlyn's daily fish market has recently gone online only.	3	★ ★	<p>Bring the stories of the markets and of their producers to life.</p> <p>Low season: Create new experiences around a visit to the market linking into cookery experiences.</p>	Currently a gap of any linked tourism products exist.
Vineyards & Distilleries	Polgoon Vineyard is the only vineyard and winery in the area. They currently run wine and cider tasting tours. Pocketful of Stones Distillers are a small craft distillery Longrock. They handcraft gin, absinthe and cider brandy. Whisky is in the pipeline.	1	★ ★	<p>Develop wine tours further with their kitchen offer and tapping into the vegan market.</p> <p>Low season: Combining the vineyard with the distillery experience.</p>	Combined beverage tour.

Thematic itineraries & experience

This options analysis report highlights future opportunities for experience product development.

In year one, EXPERIENCE Marazion & Penzance aims to create five thematic itineraries. These thematic itineraries will encourage visitors to “discover the area like a local” uncovering the expected and unexpected stories. The five themes will be:

1. Creative and culture – the local area is buzzing with a bohemian art scene with a diverse selection of artists, galleries, theatre and festivals. With the installation of the new arts trail, the distinct history and heritage of the local area, Penwith’s starring role on screen and the area’s literacy credentials, this theme will tell the creative, cultural and heritage stories.

2. The great outdoors – Mount’s Bay is home to a breath-taking coastline and provides a gateway to the rugged landscapes of Penwith. This theme will capitalise on ways to enjoy the great outdoors in the low season, from cycling, walking, gardens, nature and wildlife, stargazing, well-being and transformative experiences.

3. The shoreline – Mount’s Bay is the biggest bay in Cornwall and home to a unique marine environment, this theme will look at experiences that actively interact with the coastline including the working fishing port of Newlyn.

4. Sustainable food – visitors are increasingly interested in sustainable local food and drink. From local vineyards, food producers, fish markets, foraging and wild dining, this theme will focus on the local sustainable foodie larder.

5. Sustainability and our planet – the local area is a pioneer when it comes to sustainability. This theme will explore the trend of transformative travel. From local shopping, beach cleans, surveying local flora, fauna and rockpools, mindfulness experiences, like sunrise yoga, this theme will provide hands on transformative experiences.



The EXPERIENCE Marazion & Penzance project team need your input. If you have a product already available or potential ideas that fit with the above themes, please get in touch with experiencepenzance@cornwall.gov.uk and set up a 1-2-1 meeting.

The project team are hoping to encourage business collaboration on experience creation and may get in touch with your organisation directly.

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