

EXCERPTS FROM THE WALES TOURIST BOARD'S ACHIEVING OUR POTENTIAL; A TOURISM STRATEGY FOR WALES

Natural and Cultural Environment

One of Wales Strongest tourism assets is its rich and varied natural landscape. Three National Parks, five Areas of Outstanding Natural Beauty, 300 miles of Heritage Coast and the distinctly rural nature of Wales provide a special quality and character for the visitor to enjoy. It is a country of two living languages which sets it apart from the rest of the UK, and many features remain in the landscape which signify its unique and special history. These valuable environmental and cultural assets must be safeguarded not simply for the benefit of tourism but for the good of the nation. Along with the character and diversity of its people, they are the essence of Wales and provide its distinct identity.

Tourism Infrastructure

Good information provision can generate additional spending, stimulate return business and help lengthen the season by increasing awareness of events and activities outside the traditional peak period. Wales needs to ensure that it is providing a service that meets the needs of visitors before, during and after their visit.

A challenge facing the industry in the future will be to embrace the opportunities which will increasingly arise from new and evolving forms of information and communication technology to provide more relevant and useful information prior to and during the visitor stay. In particular, the industry in Wales must accept the inevitable extension of the role of the Internet, not just as a tool for providing information but also as a means of stimulating bookings and of improving understanding of the market.

Accommodation

There are few international/national branded hotels that could help give Wales a stronger marketing identity. Branded hotels are forecast to take a significantly higher market share internationally over the next decade, utilising global central reservation systems and sophisticated marketing techniques to generate repeat and new business. Quality assurance based on consistency of delivery is a strong element in the success of brands. However, it is the individual character and personal service found in many of Wales' farmhouses, guest houses and hotels which attracts many of our existing visitors. Most are independently owned and the distinctive Welsh experience they provide forms the backbone of the industry in many areas. The development of an innovative and dynamic serviced accommodation, in town and country, is seen as being essential if Wales is to capture an increasing share of the short breaks, overseas and business/conference market.

Ageing Population

Western populations are ageing as life expectancy rises and fertility rates fall. In the UK, the key changes to the age structure of the population until 2010 are:

- a rapid decrease in the number of those aged between 24–34;
- a strong increase in the number of those in the 'family life stage', aged 35–44, and
- a rapid increase in the number of older middle-aged i.e. 55–64.

The middle-aged groups will tend to have higher levels of disposable income and their commercial status will increase in importance. Having a greater proportion of older people in society will be a market opportunity but investment will be necessary to ensure a range of facilities appropriate to their special needs.

Personal Mobility

The continued high density use of private cars is an unsustainable option for tourism. The associated problems of pollution and congestion damage the environment and undermine the visitor experience. New ways, therefore, must be identified to improve access to transport alternatives through improved choice and facility provision.

Technological Change

The application of the Internet for providing information and servicing bookings is still largely untapped but potentially could revolutionise the way that the tourism product is sold and distributed. New technology will also have implications for direct marketing approaches which rely on active customer databases.

Private/Public Sector Partnership

It is not the responsibility of government to undertake activities or provide services which are best done by the private commercial sector. Its rightful role is to intervene where there is a need to do so and to undertake those activities which are beyond the scope of the industry to deliver.

There are many other organisations involved in tourism in Wales. All have a contribution to make in achieving sustainable growth in tourism. The challenge is to ensure that the total contribution achieved through effective partnership working is greater than the sum of individual contributions.

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