



Llywodraeth Cymru
Welsh Government

Developing an Action Plan for the Visitor Economy

Analysis of Responses to '10 Questions – Let's Shape the Future'

Mae'r ddogfen yma hefyd ar gael yn Gymraeg.

This document is also available in Welsh.

Analysis of Responses to 10 Questions

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Views expressed in this report are those of the researchers and not necessarily those of the Welsh Government.

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1. Summary

Introduction

- 1.1 This report provides a summary of the responses to ‘10 Questions – Let’s Shape the Future’. In developing their new Action Plan, Visit Wales sought the views and perspectives of a range of stakeholders who have an interest in tourism and the visitor economy. Through an online survey, events, and written correspondence, stakeholders were invited to offer their views on a range of issues affecting the sector, as well as the priorities and opportunities that the Action Plan should reflect and towards which it should work. Between May and June 2019, 386 businesses, individuals and organisations from across Wales contributed their views to ‘10 Questions’. Together, responses to ‘10 Questions’ provide an indication of the views and opinions on the sector, rather than a definitive statement.

Approach to the Analysis

- 1.2 In understanding the views of respondents, the Welsh Government commissioned an independent analysis of the responses. The objective of the analysis was to understand and map the range of views held by respondents, and explore how prevalent perspectives are across different stakeholder groups. In order to make sense of the different views and perspectives expressed by respondents, the authors conducted a content analysis. This approach systematically examines each response, highlighting themes and issues that are raised.

Responses and the 10 Questions

- 1.3 Each of the 10 questions sought to explore a specific issue or challenge facing the sector, and how Visit Wales should respond thereto. Question 1, for example, set out to examine respondents’ views on the visitors of the future, whom they felt it would be important to attract in developing the visitor economy, and what could be done to encourage them to stay longer and spend more. Respondents expressed a diverse range of views and perspectives in relation to the visitors of the future. There appear to be two distinct viewpoints, for example, concerning whether to focus on attracting domestic or international visitors.

- 1.4 Across the 10 Questions, there were a number of key themes that respondents raised and felt were important. Harnessing the unique Welsh landscape, culture and language, for example, was consistently viewed by respondents as being key to developing the visitor offer. Focusing efforts upon developing the quality of products and services was seen by many respondents as being key to enhancing the visitor experience. There was a consensus surrounding the importance of investment in infrastructure, including in digital and transport connectivity and in the public realm.

Responses and the Well-Being of Future Generations Act

- 1.5 In developing an Action Plan for the visitor economy, Visit Wales also sought to draw on the principles and goals contained within the Well-being of Future Generations (Wales) Act 2015. The Act is concerned with improving the social, economic, environmental and cultural well-being of Wales. In guiding the development of the Action Plan, Visit Wales were keen to consider the views and priorities of respondents in relation to the Well-being goals. Therefore, the analysis sought to map and understand the relationships between respondents' views and sentiments, as well as the objectives of each Well-being goal.
- 1.6 The analysis suggested that there was considerable overlap between the sentiment and goals of the Act and the views and perspectives held by respondents. The importance of promoting economic, social and environmental sustainability throughout the visitor economy was a key theme featured in many responses, for example. This is reflected in a key Well-being goal, i.e. a resilient Wales, which seeks to maintain and enhance the natural environment that supports social, economic and ecological resilience.

Conclusions

- 1.7 The analysis found that there was a broad consensus amongst respondents with respect to the importance of tourism and the visitor economy to communities across Wales. Moreover, there were broad areas of agreement regarding the need to enhance the visitor experience, and to ensure that the sector manages and reduces the impact of its activities on the environment. Where there were areas of agreement amongst respondents, these tended to revolve around overarching issues, challenges and themes, such as the importance of investment in infrastructure, training and development.

- 1.8 Where there is less agreement amongst respondents, this tends to focus on the precise solution or priority in relation to a challenge facing the sector. This includes whether to focus efforts on attracting domestic or international visitors, and which international markets Visit Wales should be prioritising. Whilst improving the quality of the visitor offer was the most striking theme throughout responses, how that was to be achieved was less clear, with respondents offering a diverse range of suggestions and solutions.
- 1.9 Areas in which there is apparent disagreement serve to highlight how diverse the sector is and that there may not be a clear or consistent industry view. There are, however, important areas of agreement upon which the future Action Plan could draw in finding common purpose.

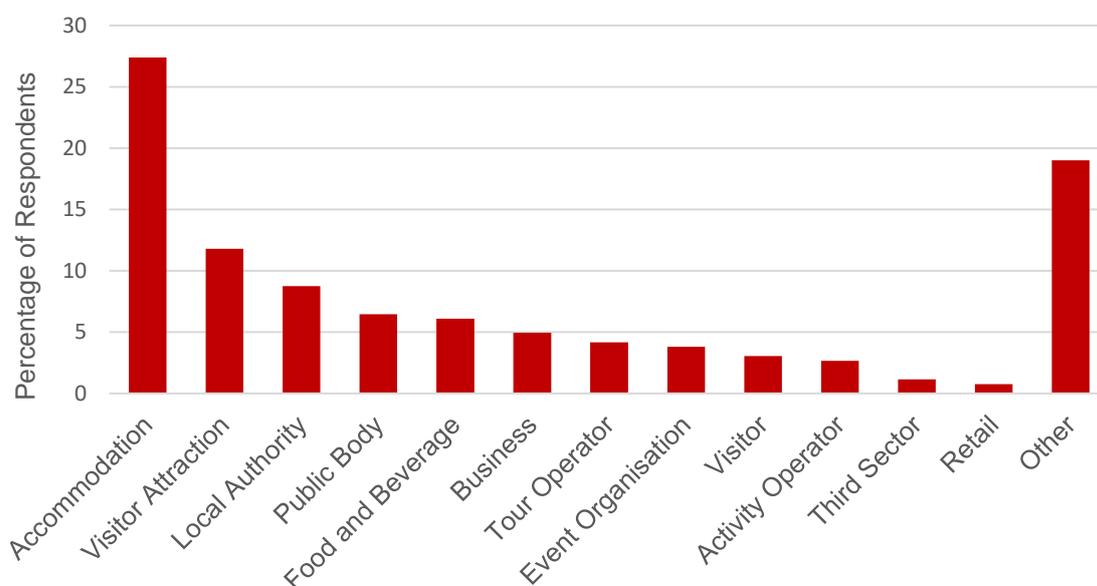
2. Introduction

- 2.1 This report summarises an independent analysis of the responses to ‘10 Questions – Let’s Shape the Future’. It is intended to support the ongoing development of Visit Wales’ new Action Plan for the visitor economy. The Action Plan will outline how Visit Wales and the Welsh Government will support the visitor economy, working to ensure that the benefits of tourism are felt by communities across Wales.
- 2.2 In developing the Action Plan, Visit Wales set out to engage with businesses and wider stakeholders in order to explore and identify the future priorities for tourism and the visitor economy. Respondents were asked 10 questions that explored their views on a range of issues, including opportunities and challenges facing the sector. Furthermore, respondents were invited to contribute their views online, by post, through interviews and at regional events.

3. Responses

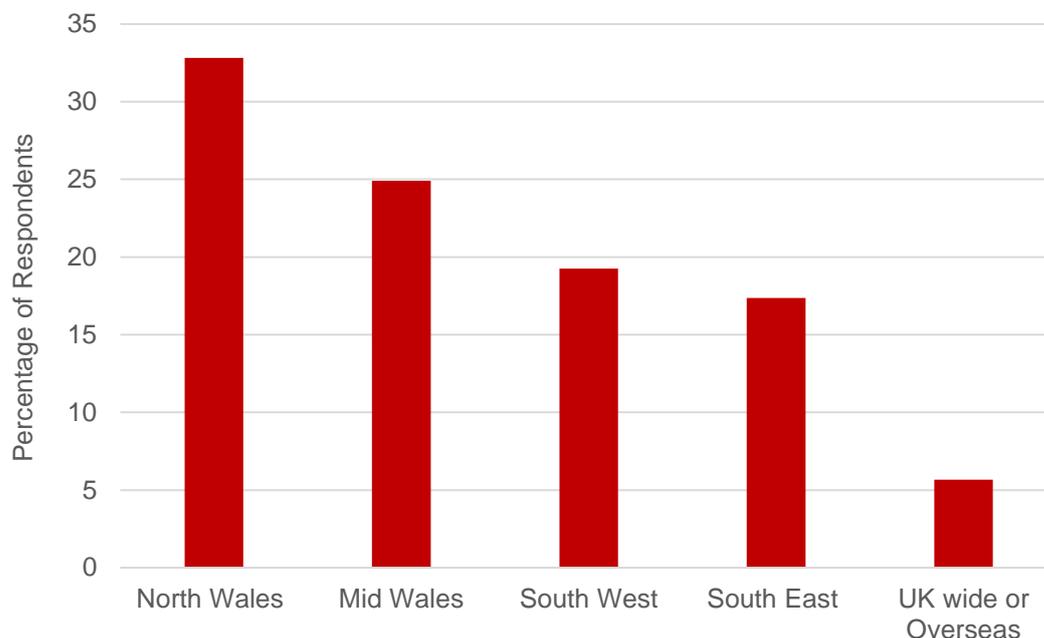
- 3.1 Together, 386 businesses, individuals and organisations gave their time to respond to the ‘10 Questions’. Respondents represented a broad range of stakeholders who have an interest in the visitor economy, including businesses, visitor attractions, special interest groups, and public sector organisations:

Table 3.1: Respondents’ tourism activity focus (n=263):



3.2 Responses were also received from businesses, individuals and organisations from across Wales, the UK and overseas:

Table 3.2: Respondents' main location (n=265)



3.3 One hundred and twenty-one respondents did not offer information with which to identify in which region they were based (31.3 per cent), and 123 did not provide information on which type of organisation they represented (31.9 per cent).

3.4 It is also important to keep in mind that the respondents to '10 Questions' are not necessarily representative of the wider community of businesses, individuals and organisations that compose the sector within Wales. Since everyone was encouraged to submit their views, individuals and organisations that are more able and willing to respond are more likely to participate. There may be other individuals and organisations that were not able to contribute their views. Together, responses to the '10 Questions' provide an indication of the views and opinions on the sector, rather than a definitive statement.

4. Approach to the Analysis

- 4.1 In order to understand the issues and themes raised by respondents, in June 2019 the Welsh Government commissioned Wavehill, an independent research organisation, to conduct an analysis that set out to:
- Understand and map the **range of views and perspectives** held by respondents in respect of the future of the visitor economy in Wales
 - Assess how **prevalent particular views and perspectives** are across different stakeholder groups and as a whole.
- 4.2 In order to make sense of the different views and perspectives expressed by respondents, the authors conducted a content analysis. This approach systematically examines each response, highlighting themes and issues that are raised. The analysis is then able to explore how prevalent each theme or idea is throughout responses. The issues and themes raised by respondents were then mapped against each of the 10 questions, as well as the goals contained within the Well-being of Future Generations Act (Wales) 2015.
- 4.3 Because of the likelihood of self-selection, we have not sought to count how many respondents held a particular view. The approach taken is largely qualitative, with the aim being to understand the range of key issues raised by respondents, as well as the reasons for holding particular views. This includes potential areas of agreement and disagreement between different groups of respondents.
- 4.4 In presenting the results, we have aimed to provide a broad picture of the views and perspectives expressed in responses. A range of qualitative terms are used to express prevalence, including 'many', 'some', 'most', and 'a few'. Interpretation of the balance of opinion must be considered in the context of the questions asked, as not every respondent answered all of the questions, nor did every respondent provide enough information to accurately determine their viewpoint. In this respect, qualitative terms are only indicative of opinions that are relative to questions on the basis of those who responded. Therefore, they cannot be assumed to relate numerically back to the total number of people and organisations that responded, or to the visitor economy more broadly.
- 4.5 The report now turns to outlining the results of the analysis.

5. Responses and the 10 Questions

5.1 This section summarises the key themes and issues raised by respondents in relation to each question, taking them in turn.

Question 1: Who are the visitors of the future?

5.2 In order to gain a greater understanding of whom respondents envisage being important to Wales' tourism sector, respondents were asked whom they perceived to be the visitors of the future. The question also included the following sub-questions:

- Who we want to attract in the future?
- How can we encourage them to come year-round, stay longer and spend more?

5.3 Respondents expressed a diverse range of views and perspectives regarding the visitors of the future. There appear to be two distinct viewpoints concerning whether domestic or international visitors represented the future of tourism in Wales. Similar proportions of respondents highlighted either international or domestic visitors.

5.4 In instances in which respondents highlighted domestic visitors, a range of reasons were offered. Some argued that focusing on promoting domestic tourism could reduce the overall environmental impact of the visitor economy. Meanwhile, others suggested the importance of encouraging domestic visitors in light of the UK's decision to withdraw from the European Union. One respondent stated:

We need to take advantage of the trend of increased domestic trips due to Brexit and people starting to understand the negative environmental impact of flying.

Visitor Attraction, Response 40: Q1

Meanwhile, in cases in which the importance of international visitors was raised, respondents evidenced the economic benefit that international visitors would bring to Wales:

In my view, the visitors of the future are from overseas. We need to start to use the weakened pound to our advantage and draw people in from abroad to experience our fantastic surroundings and get more value from their holidays.

Event Organisation, Response 43: Q1

- 5.5 This suggests that there are a diverse range of views held by stakeholders in this instance which might vary based on context and experience. Exploring the views of different groups of respondents, there was no discernible trend in perspectives.
- 5.6 There was a similar split in opinion between a targeted approach to attracting visitors and an open and inclusive approach. Some respondents felt that the focus of efforts to attract visitors should be targeted, including appealing to specific visitor segments with interests or hobbies such as walking. Conversely, there were also respondents who felt that Wales should be open and welcoming to all. Again, there does not appear to be a clear trend in views across different groups of respondents.
- 5.7 Respondents were also more specific in identifying the visitors of the future. Many highlighted the importance of attracting families. Others felt it important to introduce Wales to a younger generation. Furthermore, some felt that the visitor economy could do more to attract disabled visitors, or older adults. Meanwhile, others highlighted the importance of attracting regular visitors.
- 5.8 When considering whom the visitors of the future should be, some respondents reflected upon the importance of attracting tourists who would be more likely to spend more on their experience. It was felt by some respondents that this segment would be responsive to the Welsh language and culture, the natural landscape, and Welsh produce, which, in turn, would be of economic benefit to the Food and Drink economy, which remains another priority sector.

Mid/high-range visitors who appreciate quality Welsh ingredients and drinks are self-starters/explorers and have a potential interest in both the landscape and culture.

Food and Beverage Business, Response 74: Q1

- 5.9 When asked how Visit Wales and the wider Welsh tourism sector can encourage future visitors to visit year-round, stay longer and spend more, a significant proportion of respondents suggested that the overarching visitor offer needs to provide consistently high quality. Therein, respondents suggested that there needed to be a wider range of high-quality attractions, activities, and higher-quality accommodation and entertainment. This, many respondents suggested, would ensure a positive visitor experience and encourage repeat visitors.

We want to attract anyone who will derive pleasure from being in Wales and will go home with positive feelings about it, will encourage others to visit and will return themselves. We need to ensure that we have high-quality leisure opportunities that are suitable for all weathers and all times of year. To enable this to happen, providers need to coordinate their offer to tourists with each other.

Visitor Attraction, Response 141: Q1

- 5.10 What is more, respondents highlighted the need for improved marketing, and to promote the Welsh language, culture and heritage. Others highlighted the need to develop an enhanced environmental offer, improving access, facilities and activities that support engagement with the natural environment, including promoting greater eco-tourism. Meanwhile, others highlighted the importance of greater investment in infrastructure, e.g. transport links as well as other facilities such as toilets.

Question 2: How can we be international?

- 5.11 In exploring how the Action Plan should engage and encourage international visitors to visit Wales, Question 2 sought to explore respondents' views on how this could be achieved. There were also a number of sub-questions:

- Are international visitors' needs different from domestic ones?
- While they are experiencing Welsh culture, how can we show respect to theirs?
- How can we make them feel welcome?
- How can we distinguish Wales from the rest of the UK?
- We have been focusing on Ireland, Germany and the USA — but where are the international markets of the future?

- 5.12 Responding to the question of whether the needs of international visitors were different from those of domestic visitors, the vast majority of respondents suggested that they were different. In these instances, respondents suggested that the differing of cultures meant that international visitors might have different needs, highlighting in particular the expectations of visitors with respect to experiencing the Welsh language and culture:

The needs and expectations of international visitors to Wales are likely to focus around discovery of a quality, authentic Welsh experience, sense of place, value for money, with strong local provenance and distinctiveness from other markets.

An Individual, Response 323: Q2

Respondents who suggested that international visitors have different needs also highlighted other practical needs such as language barriers and limited transport options, e.g. visitors travelling without a car.

- 5.13 As with Question 1, respondents to Question 2 commonly highlighted the need to showcase the Welsh language and culture as a way of distinguishing Wales from the rest of the UK. Aligning with the Well-being goal regarding the promotion of the Welsh language and culture, a significant proportion of respondents suggested that promotion of the Welsh language and culture should be central to any future Action Plan.

To differentiate us from the rest of the UK we need to recognise our distinct culture, landscape and history, which means that we (as the tourism sector) need to understand, recognise and value all aspects of this small country.

Part of the Tourism Industry, Response 157: Q2

Wales boasts some of the most diverse landscapes and coastlines in Europe, and a strong, traditional culture that is recognised globally.

Local Authority, Response 22: Q2

- 5.14 As for the question of how to distinguish Wales from the rest of the UK, there was a consensus amongst respondents regarding the importance of improving the quality of the tourism offer. This included ensuring good customer service, offering a diverse range of activities and/or high-quality Welsh products. Furthermore, many respondents highlighted the importance of projecting the image that Wales is a high-quality tourist destination in its own right.

- 5.15 Amongst the respondents, there appears to be no clear consensus on the specific international markets that Visit Wales should be targeting in the future. A few respondents saw emerging markets as offering significant potential, including China, Russia and Malaysia. Moreover, others highlighted the importance of maintaining and strengthening links to English-speaking countries including the USA, Ireland, New Zealand and Australia. Meanwhile, others highlighted the

importance of visitors from European countries including Belgium, the Netherlands, Denmark and Germany.

- 5.16 It was not always clear as to how respondents had arrived at the judgment in naming a specific international market. What is more, it was not clear from within and across many individual responses whether Visit Wales should focus on specific segments within named markets, or whether promotional efforts should be aimed more widely. One respondent highlighted the importance of exploring this question further:

I think it's important whatever market Visit Wales prioritise that we make sure that we match the right market to our product — our product is much harder to change than our advertising budget. More research could be done into markets that are a good fit with Wales.

Accommodation, Response 96: Q2

Question 3: What do our visitors need?

- 5.17 Question 3 sought to tap into respondents' views on meeting the needs and expectations of visitors. There were a number of sub-questions:

- What can we learn from other destinations?
- How can we exceed expectations?
- How can we go the extra mile to bring visitors back, year after year?
- And how can we balance all this in a sustainable, eco-friendly way?

- 5.18 As illustrated in Question 2, there was a broad consensus amongst respondents regarding the importance of providing high-quality products and services to visitors. In terms of addressing the needs of all visitors, quality was a key theme featured in the majority of responses. Other potential aspects of the visitor offer, including choice and value, were much less prevalent within responses.

5.19 Many respondents interpreted the question as being concerned with how the visitor experience could be improved. In terms of exceeding expectations and going the extra mile, respondents tended to focus on gaps in provision that they thought undermined the overall visitor experience:

We need more high-quality destinations — whether it's visitor attractions, hotels or restaurants — and greater emphasis on all-year business to help the sector maintain high-quality levels with greater levels of permanent full-time staffing.

Part of the Tourism Industry, Response 257: Q3

5.20 A common theme throughout responses was the importance of raising the quality of the food, entertainment and accommodation offer. In this instance, some respondents suggested that the Welsh Government and Visit Wales could advise and support businesses so as to ensure a greater level of quality across the country.

The quality of the offer, especially with regard to accommodation and food, is still quite hit-and-miss. Many smaller, often older businesses would benefit from advice and support to enable them to make simple changes to improve the products they offer.

Part of the Tourism Industry, Response 39: Q3

5.21 Respondents also commonly highlighted the need for greater investment in public facilities, transport links and accessibility, and environmental maintenance. In these cases, respondents suggested that it is important to get the fundamentals right by ensuring that destinations have the infrastructure in place to encourage visitors to remain and return:

Get the basics right! Open public toilets and facilities which are clean and accessible — clearly signed, safe parking for private vehicles, including for cars, towing caravans and for motorhomes. The ideal is free-of-charge parking, as tourists are used to in many continental countries. Remember, height barriers make it impossible for many motorhome drivers who want to park to explore and spend money in local communities across Wales.

Accommodation, Response 155: Q3

Question 4: Where should we focus our efforts?

5.22 In helping to prioritise key actions, Question 4 wanted respondents to consider which issues and challenges were most important to themselves. There were also several sub-questions:

- Where should we direct our energy?
- What does Wales want to be famous for?
- What should our investment priorities be?

5.23 Answers to Question 4 tended to mirror responses to earlier questions in respect of the issues that respondents raise. A significant proportion of respondents highlighted the importance of improving the quality of products and services offered to visitors, including customer service and food and drink provision. Therein, respondents often highlighted that efforts should be focused on promoting Welsh tourism, highlighting strengths and ensuring that the sector can continue to become more sustainable and resilient.

Energy should be focused on clarifying and strengthening propositions for Wales nationally and regionally. In recent years, north Wales has been successfully established as an adventure tourism destination. Investment priorities should now focus on mid Wales, where there are opportunities to develop health and well-being and dark skies tourism at Elan Valley and Brecon Beacons National Park. Iconic, signature and world-class products are needed to achieve this.

Visitor Attraction, Response 91: Q4

5.24 When asked what in particular they thought Wales should be famous for, respondents suggested the following factors in order of decreasing prevalence:

- Welsh culture and heritage
- The natural Welsh environment
- The overall quality of the Welsh tourism offer
- Welsh food and drink
- Outdoor activities
- Welsh language

Responses to this question clearly illustrate the wide and diverse offer that is available to visitors in Wales. Throughout many responses there was considerable optimism and ambition:

Keep working on Brand Wales. It's fab but not reached its full potential yet.

Part of the Visitor Economy, Response 245: Q4

World-class food and hospitality with a warm welcome set within our extraordinary, world-renowned, iconic land and seascapes — outstanding adventure and wellness experiences. Authentic and well considered, we do well to not follow the highly commercial marketing tone that other countries follow. We should be different and much softer.

Response 275: Q4

Wales is stunning and beautiful. It would be great if Wales was known as the cleanest place to go. It is often cheaper and easier to encourage return visits than to get new people to visit. But if a location is scruffy, untidy with litter and things broken, then people will be put off returning.

Accommodation, Response 119: Q4

5.25 Respondents also suggested, with respect to Question 4, that Visit Wales should ensure that there is more comprehensive promotion and marketing of Welsh tourism, e.g. through regional strategies, greater encouragement of sustainable travel and greater consultation with local suppliers so as to ensure that they are sufficiently supported and promoted:

The food and drink industry in Wales is one of the success stories. The sector has been very successful, with help from Welsh Assembly Government and initiatives like Cywain and distributors like Castle Howell and Blas ar Fwyd helping to ensure that small producers are well represented in stores and restaurants in Wales; very much a success story and helped by the growth in tourism and people wanting to know provenance — success of regional and small-scale producers benefitting from tourism.

Visitor Attraction, Response 18: Q4

5.26 When responding to what Visit Wales' investment priorities should be, following on from the highlighted need for, and importance of, a high-quality offer, the most common suggestion was to increase investment in infrastructure. This included investment in public transport links and transport routes such as cycle paths, as well as in the visitor attractions themselves. Increased investment in both public infrastructure and visitor attractions, respondents suggested, would ensure prosperity and resilience of the Welsh tourism sector as a whole, as well as ensuring that communities within Wales are able to be cohesive.

Making sure that when planning the communities of the future in Wales, that tourism and our capacity and ability to accommodate our visitors is truly integrated. The new consumer still needs to be able to get to Wales and travel around Wales. Infrastructure is important. We should be thinking and investing now in infrastructure that future-proofs Wales and shows we are at the forefront of changes, such as a network of fast-recharge stations, light rail systems, alongside the more traditional infrastructure issues such as improvements to rail and rolling stock.

An Individual, Response 122: Q4

Question 5: Why does it matter?

5.27 Question 5 sought to tap into the range of impacts of the visitor economy on Welsh communities. There were also a number of sub-questions:

- What are the holistic benefits of tourism to Wales?
- How can we positively link tourism to our wider values and way of life?
- How can it support Welsh language and culture?
- How can it help make our communities healthier, happier and more prosperous?

5.28 When asked about the holistic benefits of tourism within Wales, respondents often highlighted the prosperity that tourism brings to Wales in the form of inward investment and job creation. One respondent stated:

Tourism for many small, rural businesses is an essential part of their economic viability and in rural areas, tourism's holistic reach helps to sustain local non-tourism businesses, e.g. village shops, pubs. Tourism can be holistic by

supporting and enabling resources, access and attractions for shared use by visitors and locals, whether in the public, private or voluntary sector.

Local Authority, Response 211: Q5

5.29 Moreover, it was highlighted, with respect to Question 5, that tourism could establish and consolidate links between communities and those of different cultures, e.g. through repeat international visitors:

Tourism helps widen awareness and, hopefully, tolerance of those who may be different in culture, beliefs and priorities.

An Individual from the UK, Response 230: Q5

There were, however, instances in which respondents stated that even though tourism could be cohesive, there needs to be greater awareness and encouragement so as to make tourism inclusive. One respondent stated:

The problem with tourism, not just in Wales but everywhere, is that it often happens in a bubble. Tourist attractions are avoided by locals during the tourist season. Tourists and locals may occupy the same spaces, but they see them very differently.

Response 155: Q5

5.30 In order to enhance the holistic offer that tourism can provide, it was suggested by many respondents that it needs to become more accessible through greater engagement with communities in order to extend and integrate its reach and positive effect.

Tourism should not be seen in isolation, but as an integral part of the foundational economy as stated by the Welsh Assembly. Thereby, tourism should also be seen as integral to all, not only the privileged, i.e. accessible tourism and tourism in areas of deprivation to support the local economy and as an integral part to community development.

Part of the Tourism Industry, Response 63: Q5

Whatever is done for the tourists should be planned to benefit the local community, facilities jointly held, managed and used between those promoting tourism and the local daily users.

Part of the Tourism Industry, Response 189: Q5

Question 6: How can we work together?

5.31 In exploring how Visit Wales should engage and work with the broad range of stakeholders who compose the sector, there were a number of sub-questions:

- Unlike other UK organisations, Visit Wales is part of Welsh Government and not a travel provider. Are we working as effectively as we could do within Welsh Government?
- Are we engaging with the sector in the best way possible?
- Are we clear about what we can do, what others can do better, and how we can best work together to help tourism in Wales to thrive?

5.32 When asked to think about how effective Visit Wales have been in their role, respondents suggested that there was good progress made throughout the previous strategic period. In particular, respondents highlighted that there has been a more joined-up approach between Visit Wales and stakeholders across the sector as well as other governmental departments. Meanwhile, some expressed that partnership working could be strengthened. One respondent stated:

Looking from the outside in, there has been progress over the last strategic period in terms of better join-up of work programme and priorities across portfolios and departments, but there is still more that can be done to maximise efficiency and effectiveness of resources and ensure alignment across key policy areas for implementation such as the Environment Act, Well-being of Future Generations Act, and the Environment for Growth agenda.

Visitor Attraction, Response 3: Q6

5.33 In strengthening partnership working, some felt that future strategy could be improved through more targeted priorities and action:

I feel there have been great improvements in working together in recent years. There is a challenge that the messages and priorities are still too diffuse, and engagement with different parts of the sector needs to be more focused; at present it can be quite broad-brush and not targeted for impact.

Visitor Attraction, Response 46: Q6

5.34 When asked how Visit Wales can collaborate with membership organisations and stakeholders, a significant number of respondents suggested that there needs to be greater engagement with a broader range of stakeholders, including small

businesses and smaller organisations. Therein, some respondents identified that there needs to be greater strategic partnership linking-up of organisations and resources in order to target key areas of importance, e.g. the establishment of a more sustainable tourism sector.

The role that third sector partners such as the Royal Society for the Protection of Birds, National Trust and Wildlife Trusts play, particularly in growing the green and wildlife tourism offer, is significant. Funding needs to be clearly available to all tourism providers, including the third sector. This support could come in the form of support for the development of projects, through revenue funding, as well as the direct capital for infrastructure. Our ambition is high, but we need to ensure we can lever in investment to get capital ventures off the ground. Due to our charitable objectives, we need to focus our precious resources on nature conservation.

Third Sector Organisation, Response 348: Q6

Question 7: How do we meet the digital challenge?

5.35 In exploring the role and potential of digital technology with respect to supporting the visitor economy, there were a number of sub-questions:

- How do we keep at the cutting edge of new technology?
- Is our infrastructure — broadband, Wi-Fi, 5G — fit for the future?
- What technology will future visitors expect to take for granted?
- How will we be gathering and using data? How do we balance this with the need for privacy?

5.36 With regard to the digital infrastructure in Wales, for a significant number of respondents this was a concern which could act as a barrier to growth. It was felt by some respondents that continued bad and inconsistent mobile and internet coverage across Wales was hampering efforts to attract visitors. In most cases this was understood to be a concern for rural areas in particular. One respondent stated:

Rural Wales is, in effect, blighted by poor internet access. If we want to get visitors both English and overseas into the countryside, then good speeds are needed. We still have too many 'not spots'.

Response 349: Q7

5.37 Where limited coverage was highlighted, some respondents suggested that this is a key element upon which Visit Wales and the Welsh Government should focus, ensuring that the digital infrastructure is fit for purpose so that Wales does not fall behind in technological terms.

You have to keep moving and adopting new technology where it's relevant. Infrastructure will always be slightly behind what's actually happening. We should spend as much as we can afford (as a country) on our infrastructure.

Visitor Attraction, Response 18: Q7

5.38 In response to Question 7, respondents also commonly highlighted that visitors, especially those from overseas, expect easy-to-use Wi-Fi, 4G and/or 5G, and accessible websites, using comparable examples such as Airbnb. In these instances, respondents highlighted that there is a need to match expectations, which, in turn, could enhance the cohesiveness of communities and ensure that there is greater equality throughout Wales as a result of greater technological accessibility across the country.

5.39 In the minority of cases, however, respondents suggested that whilst there is an expectation of digital accessibility, it should also be considered that a lack of technological coverage can be perceived to be beneficial, instead enhancing the notion of Wales as being somewhere to visit in order to escape from technological burdens.

The fast progress in technology may come unstuck with fear over health concerns and damage to the environment. We should be embracing slow, digital detox, non-dependency on technology, rather than trying to compete.

Accommodation, Response 208: Q7

Whilst this view was expressed in few cases, respondents also highlighted that although the need for greater investment in Wales' technological infrastructure is important, this needs to be carried out in an environmentally friendly and globally responsible way.

All technology, infrastructure, etc. must be more environmentally friendly rather than advanced. It is more important that our customers feel okay to use the resources than it be the newest tech out. It is also important that all social media, websites and experiences are modern and show an acceptance to how

technology and the world is changing, as this is what the new generations are relying on to save our planet.

An Individual, Response 196: Q7

Question 8: How do we improve quality?

5.40 This question sought to stimulate discussion and generate ideas surrounding how the visitor offer could be improved. There were a number of sub-questions:

- What will 'quality' mean to future visitors?
- How do we train people with the right skills to deliver that quality?
- How do we evaluate quality?
- What can we learn from comparable destinations?
- Do we need a grading system? And if so — how do we make sure that it is fit for the future?

5.41 Focusing on how the quality of Welsh tourism can be improved, respondents most commonly highlighted that the overarching quality of products and services needs to be improved and consistent across the sector and country. Whilst improving the quality of services and produce appears to be a clear and obvious way in which to improve the quality of Welsh tourism, therein, respondents suggested that the quality itself was tied to a greater awareness of the visitor experience and to meaningful links to Welsh Government strategies. In one instance, a respondent stated:

We must stop measuring success through visitor numbers, even though this provides ministerial justification. Use the Well-being of Future Generations Act to create a new barometer for quality and success — longevity of business, levels of investment, levels of spend, and environmental impact of visit. Ensure real, meaningful measures of value of visitor which work cross sector.

Tour Operator, Response 99: Q8

5.42 Alongside a greater awareness of the quality of Welsh tourism, what this means and how it can be meaningfully addressed, respondents also indicated that increased training of staff within the sector would provide greater quality, as high standards could be ensured and consistent. In some cases, training is understood to centre on marketing, with respondents suggesting that with greater training with regard to

marketing and promotion, staff would be better equipped to sell their attraction to the general public and visitors.

- 5.43 In this instance, respondents also highlighted the need to train ‘ambassadors’ for local areas and attractions, as this could enhance the visitor experience and encourage good reviews. Regardless of the type of training identified by respondents, training in itself was also highlighted to be a positive and effective way in which to ensure quality whilst also benefitting local people. In alignment with the Well-being of Future Generations Act goals in respect of a prosperous and resilient Wales, greater training within the tourism sector can be seen as an effective mechanism with which to enhance the skills of local people and provide greater opportunity within Wales.

Quality comes from investment and training infrastructure and people. Ultimately, the quality of the staff (particularly young, well-educated, Welsh staff) is the key to the future.

Food and Beverage Business, Response 74: Q8

- 5.44 In response to the sub-question exploring grading systems, only a few respondents offered a view, and those who did held a range of different viewpoints. Most thought that grading systems had been superseded by online review mechanisms.

The grading system should really be questioned now that there are so many online recommendation sites, as well as national schemes.

Response 157: Q8

Grading systems have probably had their day in reality — the growth of online assessments has overtaken the traditional four stars or whatever. But, there is still merit for the accommodation provider in being able to list their rating on websites.

Accommodation, Response 217: Q8

The grading of accommodation is a useful quality management tool for operators and is broadly understood by consumers. However, with the rise of digital platforms like TripAdvisor and Airbnb, customer reviews now have greater credibility.

Visitor Attraction, Response 91: Q8

5.45 A few respondents offered the view that grading systems are valuable, and that the existing system was supportive.

Yes, we do need a grading system and one carried out by neutrals where quality is the driver and not business numbers, fees.

Accommodation, Response 205: Q8

5.46 Only a handful of respondents raised points regarding grading systems. This could suggest that respondents do not hold strong views on the subject. What is more, it may be a consequence of the way in which the question was framed. The sub-question concerning grading appears last in a list of six broad questions.

Question 9: Is Wales easy to reach and easy to travel around?

5.47 Visit Wales were keen to explore the views of respondents towards transport infrastructure. There were also a number of sub-questions:

- How do we encourage people to make that journey?
- What key changes to our transport infrastructure would make the biggest difference?
- What means of transport will be important to future visitors?
- Are we doing enough on accessibility for all?

5.48 This was a key area of concern for many respondents. The majority of respondents felt that Wales is easy to reach and travel around:

By car, yes! By public transport, no — there is no cohesiveness.

Tour Operator, Response 26: Q9

Where respondents have highlighted the variability of transport, it is typically that public transport is more variable, whilst travelling by car is understood to be the easiest and most reliable form of transportation.

5.49 When asked how travelling to Wales could be encouraged, almost half of respondents suggested that the quality and accessibility of public transport needed to be improved, whilst a broadly similar group suggested that investment was needed in the road network. Furthermore, it is important to highlight that whilst the question stresses the importance of travelling to Wales, respondents typically took this to mean travelling to and across Wales, suggesting that respondents perceived travelling within Wales to be just as important as travelling to the country. In one

case, a respondent stated: 'Wales is fairly easy to reach, but not so easy to travel around.'

5.50 Throughout the 10 Questions, respondents have typically identified improved and high-quality infrastructure as being a key element of enhancing the Welsh tourism sector. When asked what changes to public transport infrastructure would make the biggest difference, respondents suggested:

- Improved public transport to and within rural areas
- More regular public transport across Wales
- Greater promotion of transport options

5.51 As previously highlighted, with regard to technology, the development of Welsh infrastructure in this way could enhance the cohesiveness of communities and ensure that there is greater equality throughout Wales as a result of more accessible transport across Wales.

5.52 Looking forward, respondents were asked what means of transport would be important in the future. Transport identified in responses illustrates a range of travel options, with the most prevalent option stating trains, followed by cars, buses and, for some, push bikes. Whilst in some cases, respondents highlighted their awareness of the barriers to accessible transport within Wales, e.g. as a result of mountainous terrain, it was suggested that challenges such as this should be incorporated into the visitor experience, aligning the importance of the Welsh natural environment with transport options.

You can't have everything, can you? Our geography prevents us having major 'straight line' roads, but our railway system could be better-quality and ports need to accommodate the growth in the cruise ship industry. We need to make transport in Wales a feature of the experiences available here — make it a positive experience as opposed to a negative one. Could we have a coastal bus?

Public Body, Response 275: Q9

Question 10: How can we do it all sustainably?

5.53 There were also a number of sub-questions:

- How do we manage the paradox of increasing visitor numbers yet safeguarding the environment?
- How do we manage visitor impact and traffic?
- How can tourism help to support a low-carbon economy?

5.54 The final question that respondents were asked as part of Visit Wales' 10-question survey was centred on how the previously mentioned changes within the tourism sector in Wales could be carried out in a sustainable fashion. Responses to this question raised a wide range of suggestions with respect to safeguarding the environment, including Welsh Government- and Visit Wales-led educational campaigns and increased promotion in order to raise awareness of sustainability across Wales, alongside increased campaigns that revolve around litter picking and recycling and the development of more electric and sustainable transport options.

Promote eco-/sustainable travel through working with local communities and providing incentives for local communities to provide sustainable modes of travel in rural areas and provide funding for research into electric transport systems.

Response 59: Q10

5.55 The suggestion to consider greater sustainable and environmentally friendly alternatives was also highlighted as a way in which Wales can support a low-carbon economy, especially alternatives within facilities and for transport.

To support a low-carbon economy, Welsh Water attractions are starting to use renewable energy to power its visitor centres, install electric charging points in car parks, and replace diesel boat engines with electric.

Visitor Attraction, Response 91: Q10

What is more, respondents suggested that visitor impact could be eased by growing and widening areas of interest to the public. Some respondents expressed concern that particular areas, such as environmental places of interest, are currently at risk of being 'loved to death' and that this could be eased through greater promotion of alternative areas and through greater resources to ensure the environment and wildlife's conservation. One respondent stated:

There is considerable potential for growth by investing in, and capitalising on, the natural environment of Wales in order to expand tourism visitors and spending. We believe Wales offers an amazing visitor experience with charismatic and flagship species and can be recognised as a place that offers memorable wildlife experiences [...]. However, popular visitor areas, such as national parks and nature reserves, are in danger of being 'loved to death' with product deterioration and a subsequent decline in visitor numbers. This problem is compounded by the fact that little of the money brought in by tourism goes back into conserving the marine or countryside environments.

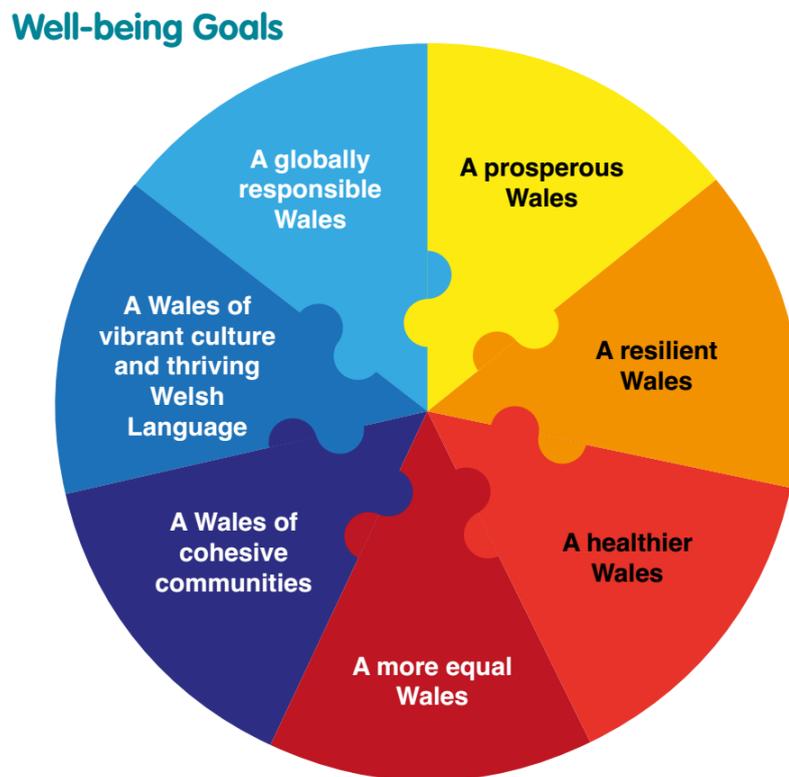
An Individual, Response 13: Q10

5.56 We now turn to outlining and summarising responses against each of the Well-being goals.

6. Responses and the Well-Being of Future Generations Act

6.1 In developing an Action Plan for the visitor economy, Visit Wales will draw on the principles and goals contained within the Well-being of Future Generations (Wales) Act 2015. The Act is concerned with improving the social, economic, environmental and cultural well-being of Wales. It aims to put sustainable development at the centre of decision making across the Welsh Government, ensuring that all actions taken meet the needs of the present without compromising future generations. The Act places a duty on public bodies, including Visit Wales, to consider and maximise their contribution to the Act's seven Well-being goals:

Figure 6.1: Well-being goals



6.2 In guiding the development of the Action Plan, Visit Wales were keen to consider the views and priorities of respondents in relation to the Well-being goals. Therefore, the analysis sought to map and understand the relationships between respondents' views and sentiments and the objectives of each Well-being goal.

A prosperous Wales

An innovative, productive and low carbon society which recognises the limits of the global environment and therefore uses resources efficiently and proportionately (including acting on climate change); and which develops a skilled and well-educated population in an economy which generates wealth and provides employment opportunities, allowing people to take advantage of the wealth generated through securing decent work.

- 6.3 There was broad recognition by many respondents of the important role that tourism plays in the economic life of communities across Wales. For some respondents, they felt that tourism itself supports the economic viability of certain communities, especially in rural areas. Others, however, expressed that the visitor economy could, and should, play a bigger role in supporting people and businesses across Wales:

A strong visitor economy will help support the wider economy, creating more jobs, [and] more security for working families.

An Individual, Response 213: Q5

- 6.4 Developing the visitor economy in ways that were economically and socially sustainable was important to some respondents. A few felt that it was also important to ensure that the economic benefits of tourism are distributed more equally, both within and across communities in Wales:

The measure of success should be on the value tourism brings to Wales, rather than purely looking at visitor numbers. Measures should be focused on profitability, local employment and fair pay — that link to the social value of tourism.

Part of the Visitor Economy, Response 221: Q1

6.5 Many respondents highlighted the potential of attracting visitors who are likely to stay longer and spend more as being a route to sustainable growth. The economic benefits of ‘high-end tourism’ were also suggested by some respondents to increase the ability of businesses to provide fair work, which is a key Welsh Government objective.¹

6.6 Alongside the economic contribution of tourism, many respondents highlighted the important role of the visitor economy in supporting employment opportunities. Investing in people was seen by some respondents as being important in addressing issues, such as low skill and low pay, that are prevalent across parts of the sector. Training was also seen by some respondents as being important in developing and improving the visitor experience:

Wales’ food and hospitality experience should make a lasting impression on visitors, which, in turn, will encourage return visits and new visitors to the country. All food service providers, including hotels, restaurants, visitor attractions, cafes, should be trained to the highest level of service.

Part of an Organisation with Links to Tourism, Response 132: Q4

A resilient Wales

A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change (for example climate change).

6.7 The importance of promoting economic, social and environmental sustainability throughout the visitor economy was a key theme which featured in many responses. There was a broad consensus surrounding the importance of maintaining and protecting the natural landscape, for example, especially as many respondents perceived Wales’ natural environment to be a key draw for visitors:

The typography and biodiversity in Wales is incredible and well worth celebrating and preserving. Wales can lead the way in wildlife conservation, re-wilding, alongside sustainable farming practices etc. Wildlife attracts both domestic and international audiences.

Visitor Attraction, Response 40: Q2

¹ <http://www.assembly.wales/research%20documents/18-033/18-033-web-english.pdf>

6.8 Some respondents highlighted the importance of finding the right balance between promoting growth in tourism and managing its potential negative impacts, both socially and environmentally. Promoting greater domestic tourism was seen as being the answer to some respondents, reducing the distances that people travel in order to reach Wales. Meanwhile, others felt it valuable to try to promote greater visitor expenditure without increasing the total number of visitors. From this perspective, such an approach would promote growth whilst managing the footprint of tourism:

Focus on attracting higher-spending visitors and growing the value of tourism, rather than growing the volume. Focus on extending the season into the shoulder months...

Local Authority, Response 326: Q10

6.9 Many respondents explored the social and environmental impacts of tourism by highlighting issues surrounding transport and connectivity. In moving towards a low-carbon economy, there were two distinct groups of respondents: those who advocated greater investment in public transport, and those who felt that electrification of the road network and moving away from fossil fuels were important:

Safeguarding the environment is something that is also important to us all and, as we know, climate change is real and happening. As in the previous question, the car is very important in Wales, as the public services are good in some areas and not so good in others. Reliability is a problem... Again, looking at investing in green technologies across the tourism industry would be positive — biomass, PV, electric charging points, etc.

An Individual, Response 302: Q10

A healthier Wales

A society in which people's physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.

6.10 There was recognition by some respondents of the positive impacts of tourism on health and well-being. A few respondents highlighted the link between getting out and about, especially undertaking activities such as walking or cycling, and positive health benefits. Meanwhile, a few others also highlighted the important role that

inward investment tourism played in well-being, both in terms of the positive effects on people with respect to employment, and in funding local public services.

A more equal Wales

A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).

- 6.11 Whilst there was broad recognition of the economic role that tourism plays in Welsh communities, only a few respondents explored the potential of the visitor economy to promote equality of opportunity and outcomes. A few highlighted the prevalence of low-skilled, low-paid employment as a problem facing parts of the sector, for example, limiting the opportunities available to some in society. Suggestions in respect of how this could be addressed included improving the opportunities, training, pay, and career paths offered to people throughout the visitor economy.

A Wales of cohesive communities

Attractive, viable, safe and well-connected communities.

- 6.12 Respondents offered a number of themes and ideas regarding the potential and limitations of the visitor economy in supporting viable and well-connected communities. Again, a few respondents felt that the economic impact of tourism itself rendered some rural communities viable, providing direct and indirect employment opportunities and enabling broader businesses not directly involved in tourism to supplement their income.
- 6.13 It was felt by some respondents that the inward investment brought about by tourism also enables and promotes greater investment in transport and digital infrastructure, whereby providing vital connectivity. There was a broad consensus, however, in respect of the need to address and expand connectivity, especially for rural communities. Respondents often highlighted both local issues, such as poor local public transport provision and digital connectivity, and national issues, such as access to international airports and difficulties in navigating between the North and the South of the country.

A Wales of vibrant culture and thriving Welsh language

A society that promotes and protects culture, heritage and the Welsh language, and which encourages people to participate in the arts, and sports and recreation.

- 6.14 There is a broad consensus that tourism is an important opportunity to promote learning and engagement with the Welsh language, history and culture. Many respondents viewed the uniqueness of the Welsh experience as being an important draw for visitors:

We should promote a warm Welsh welcome. High-quality tourists love to immerse themselves in the culture that they are visiting; this adds to the experience. We should promote our differences, e.g. unique language, and this will add to the attraction.

Event Organisation, Response 117: Q2

It is vital that tourists are properly informed about our fascinating history, which should form an important part of their visitor experience. Emphasis on the distinctiveness of Welsh culture and, in particular, its language should actually enhance the visitor experience.

Accommodation, Response 260: Q5

A globally responsible Wales

A globally responsible Wales. A nation which, when doing anything to improve the economic, social, environmental and cultural well-being of Wales, takes account of whether doing such a thing may make a positive contribution to global well-being.

- 6.15 A few respondents offered reflections on the example that Wales is setting in its approach to issues such as the environment and sustainable development. The presence of legislation such as the Future Generations Act, with its holistic approach to considering the impact of our decisions, was itself significant for one respondent:

The Future Generations Act is unique to Wales, and I think this could be tapped into. Instead of focusing on selling product (which every destination is doing and everyone's bored of), we could sell a 'message' that Wales is a country that cares about its industry, its people and its future, and really tap into the 'conscious traveller' market.

Accommodation, Response 96: Q4

7. Conclusions

7.1 A broad range of businesses, individuals and organisations contributed their views through their responses to '10 Questions'. Importantly, there were areas of agreement across a number of topics, including upon some of the opportunities and challenges facing the sector. Where there is broad agreement, this tends to relate to overarching issues and themes, including:

- The importance and value of tourism and the visitor economy to Wales.
- The importance of the Welsh language, culture and landscape.
- The need to improve the visitor offer.
- The importance of investment in infrastructure, training and development.

7.2 Where there is less agreement, this tends to focus on the precise solution or the focus of efforts in developing the sector. This includes:

- The focus on international or domestic tourists.
- Which international markets to prioritise.
- The precise priorities for investment in infrastructure.
- How improvements to the visitor offer are achieved.

7.3 Where there are areas of potential disagreement, respondents often hold different underlying viewpoints. The focus on promoting domestic tourism, for example, is often driven by respondents' perception of needing to reduce the impact of tourism on the environment. Meanwhile, the focus on promoting international tourism is sometimes driven by respondents' perception of needing to increase visitor duration and expenditure. As for which international markets to prioritise, perspectives were often driven by the experiences of respondents, including perceptions of existing visitor expenditure and footfall from those particular markets.

7.4 Areas in which there is apparent disagreement serve to highlight how diverse the sector is and that there may not be a clear or consistent industry view. In terms of priorities with respect to infrastructure investment, for example, a number of respondents offered very local examples in which they felt that investment was needed. Meanwhile, others adopted a more national perspective, considering connectivity across the country to be a significant barrier. The data does not clearly reveal trends in perspectives across different segments of the sector. It is possible

that the diversity of opinions stems from the diverse operating environments and challenges facing businesses and individuals across the sector.

- 7.5 This presents a number of challenges for Visit Wales in developing their Action Plan. Accounting for, and speaking to, the diversity of opinions and perspectives may make it difficult to balance competing expectations. Compromises may need to be made. Many of the issues and challenges raised by respondents are also not within the remit of Visit Wales. This raises both a potential challenge in terms of expectation management and an opportunity in forging alliances and partnerships and in projecting and promoting the interests of the sector within and across the Welsh Government.
- 7.6 Whilst they may not be within Visit Wales' remit, many of the challenges and priorities raised by respondents have potential benefits that go beyond just tourism and the visitor economy. Investing in connectivity infrastructure does not only benefit visitors, for example. This suggests that, in line with the sentiment of the Well-being for Future Generations Act, an approach that seeks to combine thought and action on the challenges facing local communities as well as the tourism sector may work to the benefit of everyone.

8. References

Welsh Government (2015). *Well-being of Future Generations (Wales) Act 2015*. [online]
Available at: <http://www.legislation.gov.uk/anaw/2015/2/contents/enacted> [Accessed 31 Jul. 2019].