

Culture Committee - CC-17-01(p.2)

Date: 15th November 2001
Time: 2.00pm-4.30pm
Venue: Newport Centre, Newport

Bilingualism – the critical success factor for tourism?

Although the work of the Wales Tourist Board extends into each of the areas you have identified for the Culture Committee's review of the Welsh language, we have decided, in this short report, to concentrate our comments on the areas which are both most relevant to the tourism industry and on which the activities of the board have most impact.

We will focus then on economic development and on promoting bilingualism and encouraging national consensus and goodwill.

The role of the Wales Tourist Board is clear. As an Assembly sponsored public body we are an economic force with strong social considerations. The Assembly has supported our activities financially but has high expectations of return on investment and we are tasked with delivering a 6% growth in tourism spend year on year. We do not however operate in a vacuum and have a strong set of social considerations which frame all our activities – cultural, community-based, environmental and, of course, linguistic.

1. Economic development

Importance of tourism to the Welsh economy

The tourism industry is a growing one. Tourism plays a vital role in the Welsh economy. The industry is one of small businesses and of rural businesses. Tourism, collectively, is an influential, ubiquitous, albeit for the moment, a seasonal employer. Over 12,000 businesses employing approximately 100,000 people means a proliferation of small employers struggling to sustain themselves as viable businesses through very tough times.

Tourism operators

The profile of these business people is also a factor – the majority of tourism operators in Wales are not from the local community and have often made lifestyle choice to move to that area and start a tourism business. Many start from a low threshold of knowledge of the local

community and its traditions.

Importance of rural Wales to the tourism economy

Rural Wales is vital to the tourism product both economically and in terms of the character or brand of the destination we seek to promote.

More than 50% of tourism revenue is in rural Wales and tourism is the main economic generator in a majority of rural communities.

Equally, many of the cultural values of rural Wales inform and underpin our brand positioning – as a country that inspires. The brand values are care – for the visitor, culture and the environment. A sense of community and kinship, openness and honesty and hwyl – passion and emotion. A brand can only survive if it reflects the reality, a true image of the tourism experience in Wales and that experience relies on a continued rich language and culture to deliver the visitor experience. Rural Wales is the manifestation of the values of the Wales brand – distinctive, Celtic, clean environment, active outdoors.

It is also home to a number of critical niche markets developing low volume specialist and high yield markets and which are better suited to deliver the critical and much needed extension to the tourism season.

Over a quarter of holiday spend in Wales in 1999 was associated to some extent with walking, 6% with fishing and 5% with cycling – a total of £414m – around 45% of total UK market spend in Wales is associated in some way with active holidays. This is a growing market and one whose success is vital to the community and economy of rural Wales.

Much of the Rural Recovery Fund money allocated to develop the tourism industry in rural Wales, over £2 million, has been targeted at helping rural tourism operators re-position or re-target their businesses towards growing and lucrative niche, out of season markets.

It is certainly within the board's interests as the strategic leader in tourism to support and develop the use of the Welsh language throughout Wales for these very practical reasons.

Importance of tourism to rural Wales' economy

Tourism's vital contribution to the economy of rural Wales was not fully appreciated until the recent foot and mouth crisis closed down the industry in some parts of Wales altogether. Only then did the rest of Wales and to some extent the communities themselves realise how important tourism is to sustaining the rural way of life.

Our monthly survey of the bed and breakfast sector – the core of accommodation in the Welsh-

speaking rural heartlands – showed clearly that the cumulative effects of the strong pound, the fuel crisis and of course, foot and mouth, have hit income in rural Wales heavily.

Every region of Wales demonstrated a significant downturn in room occupancy between January and July of this year compared with the same time last year - from 11% in south west Wales to 17% in north Wales and as much as 32% in the mid Wales region.

A competitive edge

Wales's competition for customers from the UK and overseas is quite simply, the rest of the world. Cheap flights and fiercely competitive foreign resorts constantly lure our loyal customers abroad. Transport links and negative publicity often turn holidaymakers away from Wales towards other parts of the UK. The Welsh language provides us with a distinct competitive advantage in both the UK and, much more so, in the overseas markets.

Our overseas marketing has always been distinguished by its creativity and its innovation. Small budgets necessitated low cost solutions.

Our focus then has been heavily on obtaining free publicity –i.e, on editorial coverage.

Time and time again the Welsh language has proven to be an unique selling point for Wales and a wonderful lead in to other cultural and social aspects than make our tourism offering in Wales so distinctive.

In a recent analysis over ¾ of tourism and lifestyle features written about Wales in the overseas media led with, or contained extensive reference to,

the Welsh language.

"When English was just a shriek in the Schleswig Holstein countryside, Welsh was being spoken in this land" I was told proudly. It is, in fact, one of Europe's oldest living languages. And Wales its newest democracy, since London granted it a modicum of self-government last year. ("But not as much as Scotland," it was pointed out to me forcefully".)

Holidaymaker magazine, USA

Living Welsh in a healthy, bilingual atmosphere is a very positive advantage to us in the competitive global marketplace.

Reference is made to the Welsh language or to Wales as a bilingual nation in all of the Wales

Tourist Board's overseas guides. These are general travel brochures and specialist brochures in other languages and over 50% of all the consumer information produced by the Board makes overt reference to the language.

2. Promoting bilingualism and maintaining national consensus and goodwill

Recent research sponsored by the Wales Tourist Board into the effects of in-migration on the Welsh Language in north west Wales illustrated that the future of the language in mainly Welsh speaking communities might be adversely affected by in-migration and tourism as a business attracts many people from outside 'honeypot' areas looking for a better quality of life and an improved working environment. The Wales Tourist Board is very conscious of this impact and works hard to avoid this impact by selling to tourism operators the practical and commercial advantages of encouraging or creating a bilingual culture in their business.

We also, through our investment of millions of pounds on behalf of the committee look to support business schemes and ideas that come from within local communities and seek to present elements of that local tradition and culture.

One of the biggest threats to indigenous cultures globally is tourism development whose scale and size cannot be sustained by the community in which it is based. Communities can be subsumed by these developments and cultures destroyed.

One of the four pillars of Achieving our Potential, a strategy for the industry, is

that of sustainability and this is interwoven through all Wales Tourist Board policy and practice and we have very clear objectives on how this can be achieved and measured.

Wales Cymru

The Wales Tourist Board uses a destination brand for all its information to consumers either in print, on the television or online. The Wales Cymru logo is an omnipresent symbol of a proud, bilingual country. This brand permeates all our activity consistently.

Sense of Place

The Board was tasked by Cymru'n Creu to propose a cultural tourism strategy. The consultation for this is well underway and a critical element of the strategy is a Wales Tourist Board initiative – A Sense of Place toolkit.

Since our culture provides such a clear competitive advantage it stands to reason that we should enable the trade to understand how to create a sense of place, how to sustain and exploit it. The toolkit is being developed by a cultural consultant who is seeking out best

practice examples from existing businesses in Wales and in other parts of Europe where a strong sense of place is manifest. From the pictures on the wall to the food on the table, from the language spoken by the staff to each other and to greet the guests to the music in the local pubs, from books on the shelves to the warm smile of welcome and farewell,

This will be a toolkit in the real sense – a practical way for businesses especially those run by non-Welsh owners to understand not only why its important but how to introduce a genuine, not contrived, sense of place to their tourism activities.

Television advertising in Wales

Due to limited resources and a focus on key markets our small-scale TV advertising campaigns have never been extended to Wales. Although the Welsh market is very important to us it has been relatively self sustaining

What the response to our Wales is open for Easter campaign proved was that the people of Wales were the first to return to Wales on holiday and that this loyalty was an important factor in limiting the damage of foot and mouth on the tourism industry. As a result, we advertised for the first time ever on Welsh television. A Welsh version of our successful 'Today in Wales' advertisement was broadcast and the response via the telephone and online showed that such campaigns can certainly generate interest amongst our Welsh speaking customers.

Welsh holiday-makers survey

The response led us to investigate further and some research was commissioned earlier this autumn into how best to reach the Welsh holiday maker. Specific emphasis was placed on researching the needs and trends of Welsh speakers.

We only have interim findings at this stage – the full report is due to be presented to us in a few days time - but it was clear that our current provision for the Welsh speaking customer while acceptable in principle is not adequate in practice. Producing the information is not enough - it has to be positioned to encourage first language Welsh speakers to read it and for Welsh learners

The research suggests that bilingual information on holidays might be off-putting to non-Welsh speakers and frustrating to Welsh speakers who wish to read a Welsh-only publication.

Wales Tourism Awards

Each year, the prestigious Wales Tourism Awards recognise and reward the efforts of the industry as they pursue quality and continual improvement. We have now built in encouraging a bilingual environment and staff training in Welsh at all levels as measure of success in each

of the twelve categories – bilingual policy and practice in each of the 12,000 plus businesses needs to be recognised and rewarded.

DMS

Our most powerful tool in the information age will be the £1.8 million, NAW funded destination management system. The system will give us the freedom to communicate throughout Wales, in Welsh, at all levels. Coming on line in March 2002, a bespoke Welsh gateway will allow all of Wales to communicate with the tourism product in Wales directly and will allow the tourism industry to access all public documentation in Welsh at every opportunity.

Conclusion

The Wales Tourist Board hopes that these issues raised informally here in this document will be of use to the Culture Committee in its review of the Welsh language. Confirmation of research and any formal data can be made available at any time should this be required.

Susan Morris

13 November 2001