

# International Tourism Potential in Inner Mongolia A Marketing Appraisal

## INTRODUCTION

While it is not the purpose of this report to overview the physical and social characteristics of Inner Mongolia a very brief account of its more salient attributes is presented by way of an introduction. This is done not to add extra words but to place the region within a geographical context and set a frame for the report itself.

The Inner Mongolia Autonomous Region of China forms the country's northern frontier with Russia and Mongolia lying between longitude 97 and 126 East and between latitude 37 and 53 North. It is roughly boomerang shaped having a north-south distance of approximately 500 kilometres and an east-west distance of approximately 3000 kilometres. With an area of almost 1.2 million square kilometres it occupies a region almost twice the size of France but has a population of only 24 million. Unlike many areas of China it is sparsely populated and is essentially pollution free which makes it an ideal region in which to develop tourism.

Much of the area lies at around 1000 metres above sea level so given its geographical location extending up to latitude 53 North, its inland location and its altitude not surprisingly it experiences long cold winters with frequent blizzards and relatively short summers. The region experiences most of its rainfall in the summer season and aridity increases from extensive grasslands in the east to desert conditions in the west. Whilst long cold winters might be a deterrent to some visitors the winter environment is an

attractor to some types of tourist and the summers are ideal for touring, outdoor leisure pursuits and sight seeing.

Of the 24 million people living in the region only around 15 percent are ethnic Mongolian. The vast majority are Han Chinese but Mongolian culture has been preserved in many areas and its strong cultural influence is far more pervasive than one would be led to believe given the relatively small ethnic Mongolian population within the total population. This is a strong plus for tourism as regional differences are always popular with tourists.

Although the popular image of Inner Mongolia in the wider world might be one of flat open plains covered in grasslands as far as the eye can see this is only part of the picture. On closer examination Inner Mongolia comprises a myriad of landscape types from the quintessential rolling grasslands to large expanses of lake, winding valleys, rugged mountain ranges and arid desert. This variety of landscape types, together with an equally diverse set of eco-habitats, creates a total tourism package second to none and a potential tourism resource highly desirable to many world travellers.

This very brief physical and socio-cultural overview presents an interesting dichotomy. On the one hand the region in question enjoys a significant profile in the wider world with its Prairie grasslands and their associated flocks of sheep minded by horse riding Mongolian shepherds but on the other hand the vast diversity of landscapes types and attendant eco-habitats are almost unknown to all who have never visited the region. This creates both opportunities and challenges for anyone examining the tourism potential of this area.

## REPORT OBJECTIVES

This report focuses on the likely tourism potential Inner Mongolia possesses for international visitors to the area. Visitors to any area or region can be divided into domestic visitors who originate from within the same country and international visitors

who have crossed an international border to reach their destination. In this sense Inner Mongolia is no different from anywhere else but for the purposes of this report it is useful to divide international visitors into those who originate from within Asia and those who originate from outside Asia (the majority of whom come from either Europe, North America or Australia and New Zealand). The reason for doing this is not to draw any artificial divisions between visitors of European descent and those from the rest of the world but as the majority of world travellers outside China today are of European descent it is prudent to pay particular attention to the behaviour and characteristics of this segment. Furthermore, the authors of this report are more qualified to provide expert advice and opinion on the characteristics and behaviour of “Western Travellers” than they are on the likes and dislikes of the Asian segment of the market.

#### OBJECTIVE 1

**Identify likely international tourism markets (with specific reference to Western Markets) which will have a keen potential interest in the Inner Mongolian tourism product.**

Inner Mongolia has much to recommend it to the international tourism market but like anywhere it has its own Strengths, Weaknesses, Opportunities and Threats (SWOT). This report examines these four characteristics in turn with special but not exclusive reference to the market segment of European descent.

#### OBJECTIVE 2

**Carry out a tourism SWOT Analysis of Inner Mongolia with special reference to the international tourism market of European descent.**

Having carried out a tourism SWOT Analysis on the region it is then appropriate to identify those features and characteristics most suitable to make up desirable tourism products for the international tourism market.

### OBJECTIVE 3

**Identify the most suitable features, characteristics, attributes and customs of Inner Mongolia which will comprise a viable tourism product suitable for the international tourism market.**

Individual elements which will ultimately comprise viable tourism products have then to be packaged in such a way that they cause minimal adverse economic, social and environmental impact on the host area and have the greatest chance of success in attracting international tourists thereby creating the greatest economic and employment advantage to the people of the region.

### OBJECTIVE 4

**Suggest possible ways of packaging the tourism products to create maximum international tourism interest in the region.**

Finally, having explored international tourism market segments likely to have an interest in the region, over viewed the region's strengths, weaknesses, opportunities and threats, identified possible tourism products and suggested appropriate packaging arrangements it is necessary to examine alternative marketing strategies aimed at linking suitable segments of the international tourism market with the identified tourism products of Inner Mongolia.

### OBJECTIVE 5

**Examine and suggest the most appropriate ways of marketing the Inner Mongolian tourism products to the international tourism market likely to be most interested in this region.**

Where ever appropriate tourism examples from outside China have been incorporated within this report to illustrate points of relevance. This is not done to try and influence tourism planners in China to emulate overseas practice but rather to illustrate what has been carried out else where with the “Western Tourist” in mind.

#### OBJECTIVE 6

**Present where ever appropriate examples of relevant tourism activity from outside China which may help illustrate best international practice.**

### INTERNATIONAL TOURISM MARKET IDENTIFICATION

For any area or region there are two ways of trying to identify possible future tourism markets. One can closely examine the area or region in detail, identify the tourism product and armed with that then look at potential markets. There is some logic in this approach because it can be argued that market identification is only possible after you have isolated the salient characteristics and one is in a position to match the market with the identified product. For an existing well developed and high profile product this is often the most appropriate strategy but the authors of this report argue against this strategy in the case of Inner Mongolia.

In the case of Inner Mongolia much of the tourism product is still in the development stage. There is little point in undertaking extensive and costly tourism development in the region in the vague hope that once completed one may find a suitable international market for the recently completed product. The other way of identifying a suitable market therefore, is to look at existing market trends and characteristics around the world and isolating segments of that world market most likely to be interested in Inner Mongolia. Armed with this knowledge it is then possible to plan and develop tourism products most likely to be attractive to, and utilised by, international markets thereby minimising development costs and potentially maximising economic returns on investment.

In reality any market identification involves some of both approaches, i.e. look at the product and then find a market or look at the market and then develop a product. For reasons already provided above it is recommended here that primary focus be given to identifying likely world markets and tailoring product development accordingly. It is for this reason that international market identification is presented as Objective 1 and not Objective 6. Even so the authors recognise the need to monitor closely both changing world markets and developing tourism product continuously and to make ongoing changes as and when appropriate. After all, responsive tourism planning is a continuous and evolving process and not a one off activity

The opening years of this century are seeing two very different sets of factors influencing world tourism trends. On the one hand there is a continuation of the supportive factors for international tourism which have been evident for the last four decades. There is nothing inherently new about these supporting factors which are well known world wide and include such things as a shorter working life which, when coupled with longer life expectancy, gives rise to more time being available for tourism activities, a general increase in standard of living which allows more disposable income to be directed towards travel, a gradual freeing up of international travel restrictions both on nationals travelling abroad and on areas receiving international visitors, on higher levels of education for all which tend to encourage travel and an improved international tourism infrastructure to facilitate travel movements. As a consequence of this increased travel around the world there is a constant search both by potential tourists and the industry to find new and interesting destinations. All these factors bode well for significant further travel increases in the future and this can only be to the advantage of tourism development in Inner Mongolia.

Unfortunately, various incidents which have occurred around the world in the last six or seven years are militating against further rapid expansion of world travel. By far the most significant factor at present is a dramatic escalation in world terrorism. The affect on world tourism of terrorist activity in the aftermath of September 11<sup>th</sup> 2001 in New York

needs no further elaboration here and the likely affects of October 12<sup>th</sup> 2002 in Bali cannot be dismissed. It is true that the Bali incident is of a smaller scale than that of September 11<sup>th</sup> but where as September 11<sup>th</sup> occurred in North America that of October 12<sup>th</sup> occurred on the edge of Asia itself. In the near future (at least the next couple of years) Bali is going to exert significant influence on world travel both to and within the region. At the time of writing this report there is an international travel warning for all western travellers to stay out of much of South and East Asia. Whilst Inner Mongolia is not located in either South or East Asia and there are no current warnings against western travel in China itself it would be a mistake to totally dismiss current world uncertainties. History has revealed that world travel patterns and demands are affected as a result of specific geographically defined incidents such as the Gulf War and September 11<sup>th</sup> 2001. China however is seen as being a safer location than much of the rest of the region and in that sense Inner Mongolia should be less affected than many other parts of the globe. Terrorist issues should not be allowed to slow down tourism planning and development in Inner Mongolia but note should be taken of it. Threats to world safety do not generally stop tourism development, they merely divert tourism activity to perceived safer locations.

It is suggested here that there are potentially three significant market sectors which would be interested in Inner Mongolia as a tourism destination. By identifying three significant sectors this does not imply that other smaller sectors would not also be interested but these smaller markets should be accorded a lower priority if tourism income and return on investment are high priorities. The three main market sectors are Upmarket Mainstream International Tourism, Soft Adventure Tourism and Ecotourism. Hard Adventure Tourism is identified as a smaller market along with Winter Based Tourism. Emphasis in this report is primarily on the three major sectors with only minor comment on those as seen as less important in the immediate future.

#### UPMARKET MAINSTREAM INTERNATIONAL TOURISM

At first sight this may appear as a rather general description of tourism lacking any specificity but it is in fact an important tourism sector for both Western tourists and all

international tourists in general. The type of tourist in this sector is one who has significant income and therefore disposable income to spend on travel, is well versed in travel experiences having visited numerous countries and destinations worldwide, is well educated and demands high standards of accommodation and service. This segment may travel as couples, as families accompanied with children or in small groups. This is not the tour bus brigade. Typically, this type of tourist will have already spent vacations in such places as Brazil, Kenya and Australia and be looking for new exotic and relatively un commercialised destinations. Tourists in this group tend to like variety and will purchase a total tourism experience involving a variety of elements such as unspoilt natural areas, historic towns and cities, shopping and rest and relaxation often in well appointed coastal or mountain resorts. This group therefore, would want more than just two weeks in Inner Mongolia and is likely to demand a few days in say Hong Kong or Shanghai on the way in, perhaps a week at a coastal resort on say Hainan Island, some cultural experiences such as the Terracotta Warriors or the Great Wall of China and may be say a week to ten days in the Mongolian grasslands. For this group Inner Mongolia would comprise a part but not likely the entire holiday package.

The following family would be typical of this group. *The Johnson Family live in upstate New York, he is a computer engineer and his wife is a Secondary school teacher. They live in a professional neighbourhood with two children aged 11 and 14. For weekends and short breaks they have access to a weekend cabin in the mountains 100 kilometres away but like to travel extensive distances about once every two years. Four years ago they toured the Caribbean islands on a cruise ship calling in on a number of islands and two years ago visited East Africa combining a week safari inland with a week on the Indian Ocean coast. Their next vacation could well be either a trip to Australia combining a visit to the desert interior with a stay at a coastal resort in north Queensland together with a short shopping stint in Sydney at the end of their vacation or a trip to China involving a stay on the coast at a good resort, shopping in Hong Kong and a tour of Inner Mongolia. The Johnson family can afford good quality accommodation and service and expect it*



## SOFT ADVENTURE TOURISM

This is a growing market involving a wider group of individuals than the group described above. Soft adventure is taken in this context to mean travel and experiences which may be a little unusual and may involve a little hardship but not any undue risk. This differentiates the soft adventure group from hard adventure tourists who deliberately seek out adventure with an element of physical danger such as canyoning, white water rafting or paragliding. Soft adventure tourists tend to be older than the hard adventure tourists and there are potentially more of them with the ability and willingness to visit Inner Mongolia. The adventure element of this tourist experience is made up of the relative isolation and newness of Inner Mongolia as a tourist destination, the ability of trekking through open grass land areas, seeing ethnic peoples and riding in off road vehicles. This group can range in age from their early thirties to their mid seventies and it is the older age groups who represent a significant element of any growth in this market segment. Comfort and luxury are generally less significant with this group but good accommodation provision should be available. This group would be looking for international three to four star accommodation although nights under canvas or in local peoples' houses in the wilderness areas could form part of the overall tourism adventure experience. This group may wish to concentrate most of their holiday in Inner Mongolia or spend some part in other areas of China such as Beijing or Shanghai. For this group Inner Mongolia would make up a greater proportion of the entire holiday experience than it would for the mainstream international tourists.

The following family would be typical of this group. *Mr and Mrs Smith come from Sydney, he is an engineer and his wife is a computer analyst. They are both in their mid forties. They have both completed round the world working holidays after graduating from university visiting such places as Italy, the Greek Islands, Hong Kong and Bali. They own a four wheel drive vehicle and spend weekends off road driving in the Blue Mountains to the west of Sydney. Now they are a little older and with more disposable income they seek out slightly more unusual holiday destinations with the offer of some adventure. They require reasonably comfortable accommodation but would like to spend a few nights either under canvas or in the homes of local people. The chance of travelling*

*in off road vehicles across grass lands and forests is very appealing. They have already visited the East Coast of Malaysia driving through the jungle and are looking for a similar adventure but in a different environment.*

## ECOTOURISM

This group might be considered as the most easily identifiable tourism market group but this it is the most difficult to describe because there is no clear cut world definition of ecotourist. Because 'eco' is a universal 'feel good' statement there is a great temptation to call almost all tourism ecotourism and to want to attract only ecotourists. There is great danger in this practice because ecotourism to those who are dedicated ecotourists means something very specific and they are easily annoyed if they are misled by marketing campaigns which purport to offer an ecotourism experience which is little more than a mainstream tourism experience which happens to be located in a natural area. This group is growing very quickly and Inner Mongolia has much to offer the ecotourist. Let it be very clear however that to the Western tourist ecotourism is much more than a vacation in a rural setting. Ecotourists feel very strongly about the environment and seek experiences which not only educate them but provide them with opportunities to actually help the environment by way of participating in scientific exercises or actually taking part in local environmental improvement work. Ecotourism is much more than merely observing or even enjoying the environment, it is all about learning more about the environment and actually helping to preserve or improve it. The true ecotourism market at present tends to be dominated by relatively affluent well educated environmentally conscious people often but by no means exclusively of middle and older aged persons. There is also much misconception regarding this market sector. Whilst they are prepared to under go hardship to observe some aspect of the environment and are not looking for five star resorts it is incorrect to assume that they are prepared to accept substandard accommodation and poor service and pay high prices for that privilege. As this is a relatively diverse sector of the market it is hard to generalise about accommodation demands but this is a discerning market and authenticity is critical. This is not a market looking for pseudo ethnic experiences where the local population put on marriage

ceremonies every hour when the next tour bus is scheduled to arrive. For this group Inner Mongolia might well comprise their entire holiday experience.

The following family would be typical of this group. *Dr and Mrs Williams live in north London, he is a retired university professor of ecology and she is a librarian. They both have lifelong interests in ecology and spend much of their time studying it. They take up to six short breaks per year normally within the UK perusing their environmental interests and belong to a number of environmental interest groups. Once a year they go on an extended trip for three or four weeks focusing on a specific project often with a small group of other like minded individuals. Three years ago they spent time in the Highlands of New Guinea looking at local bird life and two years ago they went to Antarctica to help count penguin colonies. Last year they visited Central Africa looking at baboon colonies. Inner Mongolian grass land bird life would be particularly interesting to these people. Good interpretation, guided walks, evening lectures from local experts and moderate accommodation would be expected*

#### HARD ADVENTURE TOURISM

At this stage Hard Adventure Tourism is seen as a minority tourism interest group. This group tends to be dominated by younger aged groups from their early twenties to their late thirties. This group seek adventure coupled with real danger and tend to concentrate in groups of like minded individuals. They tend to require organised adventure tours with all the necessary back up facilities such as transport, accommodation, food and beverage, health and safety care as much of the adventure occurs off the beaten track. Long distance trekking, mountaineering, white water rafting, canoeing hang gliding and canyoning would all be popular with this group. As many in this group tend to be young it is not unusual to find many seeking casual employment whilst on holiday. Visa and language restrictions would tend to preclude this group seeking casual employment whilst on holiday in Inner Mongolia thus reducing potential demand for this type of vacation. Nevertheless, hard adventure tourism is a significant segment of the world tourism industry and Inner Mongolia offers considerable potential. For this group Inner Mongolia

would most probably comprise the most significant element of their trip to China if not their entire trip excluding necessary transfers at the national gateway.

The following would be typical of tourists falling within this group. *John Cheu and James Feng are two recent university graduates living and working in Singapore. They are both in their early twenties and gained an interest in hard adventure while studying at Singapore National University .In their final year of university they went to Alpine France to go canyoning and mountaineering. Last year they spent a week in North Queensland white water rafting and are now looking for a more challenging experience. A trip to Inner Mongolia would not only provide them with an opportunity of visiting China but also partaking in a challenging rafting expedition. Accommodation would almost entirely comprise tents and cabins in wilderness areas.*

#### WINTER BASED TOURISM

This is another significant tourism market segment but is viewed as of second level importance for Inner Mongolia at this time. There is a major following for winter based sports tourism which can include skiing, sledging, tobogganing winter mountaineering and skating. Given the long hard winters experienced in Inner Mongolia winter based tourism could be important for extending the tourist season and making greater use of tourist infrastructure. This market segment requires considerable infrastructure in the way of all weather accommodation, travel infrastructure operative in all weathers and winter sports facilities such as snow slope maintenance equipment and ski lifts and the like. Until much of this is developed there is a limit as to how much winter based tourism is possible. For this group it is highly likely that the entire holiday would be spent in Inner Mongolia.

The following family would be typical of tourists in this market group. *The Kawasaki family from Tokyo run a small engineering firm on the outskirts of the city. He is the director of the firm and his wife is its marketing manager. They are both keen winter sports enthusiasts and try to go overseas at least once a year to the snows. Two years ago they went to Finland to take part in cross country skiing and last year they went to the*

*South Island of New Zealand for mountain skiing. A trip to Patagonia in Argentina or a trip to Inner Mongolia in the winter is their next interest.*

This brief overview of likely tourism markets for the Inner Mongolian tourism product has identified three major sectors and two less important sectors worthy of consideration in the future. The markets identified are those most likely to be seriously interested in the region: it is recognised that there are many other potential sub sections of the international tourism industry which could be attracted but the ones outlined are the ones most likely to offer good returns on investment and bring much needed employment to the region. It will be noted that all the sectors identified within this report are well travelled and experienced tourists which has some implications for the Inner Mongolian tourism industry.

## SWOT ANALYSIS OF TOURISM POTENTIAL IN INNER MONGOLIA

Having identified those sectors of the international tourism market most likely to be interested in Inner Mongolia it is now necessary to examine the Inner Mongolian tourism product, both existing and planned, for Strengths, Weaknesses, Opportunities and Threats. In this section of the report a SWOT Analysis of the region is carried out. However, before the SWOT Analysis is carried out it is appropriate to describe briefly the salient attributes of the tourism product in the region.

Inner Mongolia offers the tourist many and varied tourism experiences. Probably its greatest attraction for the international visitor is the unique grass land, and in some areas, a forested environment. The region is noted for its grass lands in particular and these grass lands can be considered of world as well as of continental significance. Of all the region's attributes it is probably its grass lands which are of most importance to international visitation. Clearly there is much more to the region than grass lands and its forested mountains are also important. These are less well known world wide but are of considerable significance. The lakes, rivers and hot springs of the region have tourism

potential as well but these are more of regional than world significance. The climate is conducive to tourism in the summer season but apart from the winter sports sector the winters would generally be a tourism detractor.

Closely following if not equalling the interest of the grass lands are the desert regions of Inner Mongolia. The unique desert features of sand dunes, rock outcrops and occasional water features are an important draw card for many international visitors and unlike Canada which can boast possession of grass lands of comparable importance and significance Inner Mongolia has the added bonus of the desert environment as well.

Closely associated with the natural physical and climatic environment is the flora and fauna of the region. Much of Inner Mongolia enjoys protected area status in recognition of the unique biodiversity and the plants and animals of the region are also of great potential interest

The human environment is also of considerable interest and as with most parts of the world it is the human aspect of the region which is totally unique. With the natural environment there are invariably other areas of the world offering a broadly similar experience (there are equally interesting grass lands in North America and in South America) but the human culture is totally unique to Inner Mongolia. The local Mongolian culture is well preserved and the tangible signs of the culture in the local dress, dwellings, way of life, cuisine, language both written and spoken, religion and religious buildings are all of immense interest to foreign travellers. The culture of the Han Chinese should not be over looked and is also of interest to international visitors.

General and tourism infrastructure in the region is being developed rapidly with the financial support of both the Beijing Government and the World Bank. The region is well served with airports and good all weather roads are being constructed the length and breadth of Inner Mongolia and a number of international standard hotels have recently been constructed or are in an advanced state of planning. There is still much to be done to

bring the majority of the tourism infrastructure to international standards but rapid strides are being made.

This is not intended to be a detailed analysis of the physical and social attributes on offer in Inner Mongolia, that is the focus of other reports, but it is given as a brief over view prior to the SWOT Analysis presented below.

## STRENGTHS OF THE INNER MONGOLIAN TOURISM PRODUCT

Inner Mongolia enjoys many tourism strengths which makes it an attractive destination for international tourists. Set out below are some of its chief strengths as seen by the authors from both visiting the area first hand and from subsequent research from printed sources.

- Inner Mongolia offers a new, interesting and to date little known international tourist destination and all new tourism destinations are of potential interest.
- The grasslands of the region enjoy world significance and are one of the region's chief tourist assets.
- Fortunately much of the grass land area is unspoilt and undeveloped as any form of development in this environment can be highly intrusive.
- With the exception of the regions immediately adjacent to coal field extraction there is remarkably little pollution.
- Less well known outside China are the forested mountain ranges of Inner Mongolia which are also of significant potential tourist interest.
- The extensive lakes, rivers, streams and ponds abound with fish and other wild life and have potential to nature based and more specifically ecotourists.
- The Gobi Desert located to the west of the region enjoys its own special tourist attractions and has extensive potential.
- The flora and fauna are little disturbed in many areas and offer great interest for the ecotourist

- The long cold winters might not be a strength for much tourism but they do offer opportunities for winter snow based tourism
- The Mongolian culture in all its forms has great potential and it is essential that it is protected from adverse tourist exploitation.
- A number of historic city sites offer potential if properly protected, signed and interpreted.
- All the people of the region, irrespective of ethnic background, appear friendly and to genuinely want to embrace tourism.
- Genghis Khan is well known world wide and offers much interest to overseas visitors to the region. Genghis Khan is as well know in Europe as he is in Asia.
- Marco Polo is also associated with this area and therefore provides a link with Europe which increases the potential European interest.

Clearly the most significant strengths of the region lie in the natural and cultural environment which are vulnerable to over development and exploitation and require careful conservation and management. Natural and cultural attractions are of particular interest to many sectors of international tourism.

#### WEAKNESSES OF THE INNER MONGOLIAN TOURISM PRODUCT

As with any potential tourism destination there are inevitably weaknesses as well as strengths. Fortunately many of the observed weaknesses are to do with the standard of existing tourism infrastructure rather than with the destination itself. The deficiencies are already known to the relevant authorities and can be relatively easily addressed.

- The need to obtain visas to enter the country is an inconvenience in both effort and cost. While it is recognised that obtaining a visa is necessary China could look at electronic visas as Australia has done in recent years.
- Access to Inner Mongolia often involves air transfer for most incoming visitors either at Beijing International Airport or at other China gateways. This increases both inconvenience and time.



- Access to some of the national parks and other areas of environmental interest are relatively poor and some road improvement will be necessary. Access however needs careful attention because it may be advisable to restrict access to some of the more environmentally sensitive areas for conservation purposes. Furthermore, some of the identified tourist sectors such as the soft adventure tourists and ecotourists may prefer tracks to well made roads.
- There is limited accommodation and much of the accommodation is not of international standard as yet This will need attention given some of the tourism sectors which require good standard accommodation identified earlier in this report
- Greater levels of interpretation will be needed and more Interpretation Centres must be built especially at sites such as those occupied by ancient cities.
- There is relatively little to purchase especially in the tourism and interpretation centres such as food, beverage, post cards, books, guide books, souvenirs, and the like. Sales of merchandise are not only an attraction for tourists but they help under write the running costs of the centres.
- Books, guide books , information and interpretation signs should be in at least one European language preferably English as this is the most widely spoken language outside China.
- Signage must be improved and appropriate environmental standards used.
- Although there is little one can do about the climate it should be recognised that the long cold winters will make much tourism activity highly seasonal with consequent periods of little demand for resources and infrastructure.

As most of the identified weaknesses are to do with either tourism infrastructure, infrastructure in general or tourism procedures such as visa application and interpretation many of them can be relatively easily rectified. Great advances have been made concerning infrastructure and tourist accommodation in recent years and most of the weaknesses are already being addressed to some extent.

## OPPORTUNITIES FOR THE INNER MONGOLIAN TOURISM PRODUCT

Given the interesting and unique tourism product on offer in Inner Mongolia there are abundant opportunities to develop the product a lot further, in fact what has already been achieved is but the very beginning of what could be a tourism product of world significance.

- The vast expanses of forest, grass land and desert are barely being tapped at present and there are terrific opportunities to develop many more tourist attractions in the future.
- Whilst Inner Mongolia is a relatively isolated region of the world and it is that very isolation which gives the region much of its attraction it is in fact only a one hour flight from Beijing (at least part of this region is although it is recognised that Inner Mongolia is a very large area and the further one goes either east or west the further one has to travel from Beijing)
- Much of the tourism product is based on natural and cultural attractions and it is these types of attraction which are in high demand by international tourists. Nature based and ecotourism based attractions and products are experiencing rapid growth in demand world wide.
- Cultural attractions are probably in even greater demand than natural attractions and there is great opportunity to further develop the cultural attractions in the region.
- There appears to be great willingness to develop more tourism on the part of the local people of the area and they all appear naturally very friendly. This is a tremendous advantage for future tourism development
- Winter sports and winter tourism in general has been identified as a potential growth market and there are a lot of opportunities to develop this sector a lot further.
- There are a lot of possibilities to develop nodes of interest centred on the major gateways to the region (the major cities with adjacent airports) linked by overland routes comprising either road or in some cases rail links. The region is large

enough to be able to develop tourism areas and networks and yet leave environmentally sensitive areas relatively undeveloped.

•

Although this list of opportunities is not as long as the other lists above the items identified are of considerable significance and offer great potential for further development in the future. Some of the means by which tourism can be developed further are addressed later within this report.

### THREATS TO THE TOURISM PRODUCT OF INNER MONGOLIA

There are always threats to the tourism product of any area and Inner Mongolia in no more immune to threats than anywhere else. The threats to this region are not great but must be taken into consideration.

- Although the grass lands, forests and deserts of the region are of significance world wide they are not the exclusive preserve of Inner Mongolia. Many parts of North America, many parts of South America and parts of Africa provide a natural tourism product of similar extent and quality and the governments of these areas are equally determined to develop their regions for tourism as is the government of China.
- The very nature of both desert and grass land landscapes makes any form of development highly conspicuous and there is a great danger of poor or inappropriate development ruining the scenic appeal of much of the area.
- Care must be exercised to ensure that pollution does not detract from the relatively pollution free environment that exists at the moment.
- Tourism is not the only industry in the region and care must be exercised to ensure that other industries, especially extractive industries are not allowed to ruin the tourism resource of the region.
- There is a danger of over development especially in the national parks and wilderness areas. Western tourists expect to see little more than tracks and discrete signage in national parks and do not want to see any other forms of

development. Grass sliding, shops, accommodation, car parks and the like should be kept out of the parks albeit that they may be located just outside the park near the main entrance.

- There is great faith around the world that if one develops ecotourism all will be well and little harm can occur to the natural environment. There is no guarantee that ecotourism will be benign and as ecotourism occurs in some of the worlds most sensitive places the potential risk to the environment is enormous. This holds true to Inner Mongolia.
- Terrorism in the world today is a major threat to all forms of tourism and China is not immune from this problem. China enjoys the advantage of being one of the safest places to visit but terrorism in South East Asia and potential political difficulties regarding North Korea could become a threat to tourism in this region.
- 

The threats to tourism in this region are no greater than threats occurring to most places around the world but they are real and must be addressed in any Inner Mongolian Tourism Master Plan. Fortunately most of the threats revolve around what could occur in the future rather than as a result of what has already happened.

The analysis so far has identified that Inner Mongolia has a tourism product of world significance and offers considerable scope for further development without too many risks to the environment. Work needs to be done on both improving and extending tourism services and infrastructure especially to bring both up to international standards and care needs to be exercised to minimise real dangers of inappropriate development or over development. The local people, both Mongolian and non Mongolian, are a major asset to the region and should be fully involved in any further tourism developments. It is now time to look at specific tourism elements.