



Tourism & Events presentation Place Scrutiny Committee

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Photo by Joanne Guy, Visit the Vale Competition winner - Summer 2026

STEAM 2024 latest results

2024 STEAM Results



- Total economic impact of tourism - £350 million (+1.9%)



- Total visitor numbers – 4.26 million (+5.1%)

- Number of staying visitors – 590,000 (-1%)



- Number of day visitors – 3.67 million (+6.2%)

- Number of FTE jobs supported by tourism – 2861 (-3.7%)

Purpose of the update



- Provide overview of the findings of the Vale of Glamorgan Visitor Survey 2026



- To provide an update of the accommodation stock survey and details of the new statutory registration scheme about to be introduced in Wales



- Share details of our 'Addo' campaign
- Share the results of our Digital Marketing Campaign - Summer 2026
- Share details of our Coach Tour Campaign at Barry Island

Vale of Glamorgan Visitor Survey 2026

Launched in July 2026, the Vale of Glamorgan Visitor Survey aimed to gain a better understand of our visitors motivations, behaviour, spend, experience, etc.



How?

- Digital survey shared on our website and marketed through our digital channels
- QR Code table toppers sent to all accommodation, attraction and hospitality business
- Encouraged the trade to share through their digital channels and at their business to reach visitors
- 49 questions to complete with an incentive prize offered for those that provided feedback

Results

- 940 responses
- 446 signed up to receive our Visit the Vale Newsletter
- Results will feed into the STEAM report
- Inform and prioritise future decisions relating to the destination management in the Vale of Glamorgan

Vale of Glamorgan Visitor Survey 2026 – The results

5 key findings:

 The coast and natural environment are the Vale's biggest visitor assets

 Visitor satisfaction is very high — and intent to return/recommend is exceptionally strong

 The Vale is predominantly a day-trip/short-break destination, with significant potential to grow overnight stays

 Visitors are spending meaningful amounts, but the biggest opportunity is to capture more local spend

 The visitor economy is highly car-dependent — and infrastructure is the clearest improvement theme

The Headlines

Our Strengths: The Vale's core product is strong: coast, countryside, scenery and a relaxed visitor experience drive satisfaction.

8.5/10

Average overall experience

95%

Would return / probably return

96%

Would recommend / probably recommend

58%

Very satisfied with natural environment

Our Challenges: Visitors really like the Vale, but the supporting infrastructure doesn't consistently match the quality of the core destination experience.

BASIC VISITOR FACILITIES

Toilets, cleanliness, beach facilities

ACCESS & MOVEMENT

Public transport, parking, signposting, roads/connectivity.

SPEND & EXPERIENCE

Shopping and opportunities to encourage visitors to explore more, stay longer and spend more.

Opportunity - **Protect the product, extend the stay, increase the spend, fix the basics**

Staying visitors: A strong product, but short stays

- 86% stay for 1–3 nights; only 14% stay 4+ nights.
- Accommodation performs well (8.6/10; around 84% satisfied).
- Staying visitors are economically valuable: 56% report total trip spend of £250+.

37%

Respondents were
staying visitors

8.7/10

Average overall experience

93%

Would return / probably return

43%

Stay for one night

OPPORTUNITY: The Vale currently functions strongly as a **day-trip and secondary destination**. There is a clear opportunity to encourage visitors already coming to the Vale to **stay longer and make it their primary destination**, rather than simply part of a wider Wales trip.

Staying visitors: predominantly domestic, with a substantial English market

- Wales collectively accounts for 52% of staying visitors when Vale residents are included.
- England is the single largest external source market and is much more important for overnight tourism than for day visits. Data suggests visitors are coming from a fairly broad spread of England incl the South West, Midlands, South East, London and further north
- Only 18% say the Vale is their main holiday destination; 40% see it as a secondary/additional destination

80%

Staying visitors were from England or elsewhere in Wales

43%

From England

37%

Elsewhere in Wales

15%

Vale of Glamorgan

OPPORTUNITY: The Vale's overnight market is overwhelmingly domestic, with a particularly strong South Wales/regional market and a substantial English market. The opportunity is therefore less about building an international visitor proposition and more about converting existing Welsh and English visitors into overnight stays and encouraging them to stay longer.

Day visitors: overwhelmingly local and regional

- The Vale has a very strong local day-visitor market.
- 80% of day visitors come from Wales. 62% are from elsewhere in Wales with Vale residents accounting for an additional 18%.
- The local day-visitor market is strong, indicating the Vale is an important leisure and recreation destination for its own residents.
- England contributes only 18% of day visitors, compared with 43% of staying visitors.

The coast and natural environment are the major draw:

Coast and beaches
Countryside and scenery
Walking and outdoor recreation
Relaxation/escape

31% Occasional visitors

67% Regular/repeat visitors

18% Visit more than 20 times per year

Day visitors are coming for leisure and recreation:

Walking
Visiting beaches/coast
Enjoying scenery
Eating and drinking
Spending time with family/General relaxation

OPPORTUNITY: Vale has a substantial opportunity to encourage repeat day trips, visits to different parts of the Vale, off-peak visits, greater spending on food, drink and attractions. The opportunity isn't necessarily just **more day visitors** — it's **more activity and spend per day visit**.

Visitor spend: Day visitor V's Staying Visitor

Staying visitors have a much broader economic footprint.

Among staying visitors:

- **74%** spend on accommodation
- **93%** on food & drink
- **43%** on attractions
- **38%** on shopping
- **15%** on transport
- **15%** on events

33% of Day Visitors spend £50 or less per visit

57% of Staying Visitors spend £250+ per visit

Day visitors = high-volume, repeat local/regional market.

They can visit frequently, but individual trip spend is relatively modest.

Staying visitors = lower-volume, higher-value market.

They generate substantially more expenditure, particularly when accommodation, food, attractions and shopping are combined.

OPPORTUNITY: The biggest opportunity is not simply attracting more visitors — it is encouraging existing visitors, particularly overnight visitors, to stay longer and spend more locally.

The friction points: what stops a good stay becoming an excellent one

5 Key Challenges to turn a highly satisfying visit into a longer, higher-spending and more destination focused visit.

1. Fix the basics: toilets, parking, cleanliness, signage and maintenance.

2. Improve connectivity – particularly public transport and movement around the Vale.

3. Make the destination more accessible – both physically and through better accessibility information.

4. Increase the reasons to stay – develop experiences, evening activity and packages that encourage overnight stays

5. Capture more visitor spend – encourage longer stays and greater spending on local food, attractions, shopping and experiences.

The Vale's challenge is not a lack of attractive assets; it is turning those assets into a more seamless, accessible and compelling destination experience that encourages visitors to stay longer and spend more.

Opportunity - Protect the product, extend the stay, increase the spend, fix the basics



Accommodation stock survey and new statutory registration scheme in Wales

	2026			2025			Inc/Dec		
	Properties	Unit/Room	Bedspace	Properties	Unit/Room	Bedspace	Properties	Unit/Room	Bedspace
Alternative	16	45	149	15	39	161	1	6	-12
C&C	18	659	2565	16	1148	4496	2	489	-1931
Static	4	1158	4632	3	663	2652	1	495	1980
C&C + Static Combined	22	1817	7197	19	1811	7148	3	6	49
Inn/Restaurant	10	42	106	8	29	70	2	13	36
Hotel	14	683	1392	13	502	1045	1	181	347
B&B	13	35	73	13	36	79	0	-1	-6
Self Catering	163	229	957	194	262	1085	-31	-33	-128
Air BNB Only	71	71	291	107	110	453	-36	-39	-162
	389	3147	10910	444	2984	10846	-55	163	64
Increase									
Even									
Decrease									

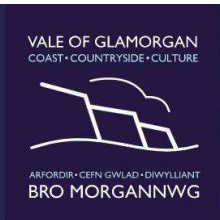
Why is it important?

Main Changes

What is Statutory Registration?
Comes into effect 1st Oct 2026 –
businesses must register by 31st March
2027

VISITTHEVALE.COM
YMWELDARFRO.COM





Barry Island Pilot Coach Tour Campaign 2026

At a recent Barry Island Pre-season officer meeting it was recognised that improved communication with group travel companies may help deliver key messages addressing some of the challenges faced by large group visits to the resort. This includes:

- Improved and appropriate use of public facilities
- Issues with leaving rubbish on the beach including BBQ's
- Water safety etc.

Visit the Vale developed a Group Travel campaign targeting this market with a view to sharing key information ahead of visits. As part of this an incentive of a free bus parking space was offered to those that registered ahead of their visit. Since its launch in June 2026:

- **339 coach registrations** were submitted.
- **154 individual companies registered their vehicles**
- The strongest market was the **West Midlands/Midlands**, followed by the **South West of England and Wales**.
- The vast majority of coaches were carrying 50+ visitors during each visit

Now the campaign is closed, it is out intention to conduct a survey asking those that registered more detailed questions about their visit.

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[YMWELDARFRO.COM](https://www.ymweldarfro.com)

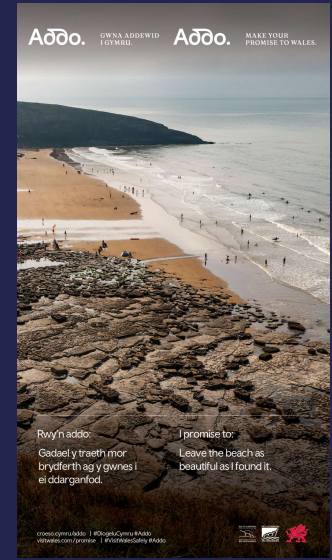
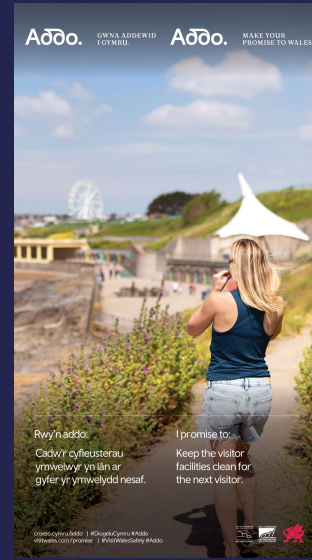
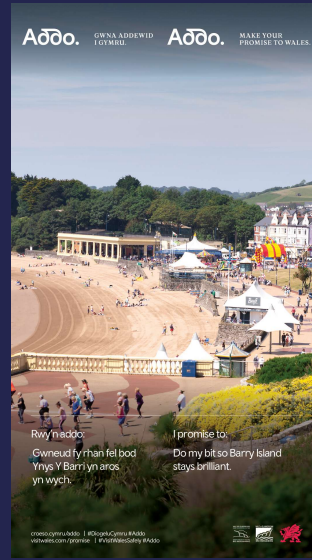
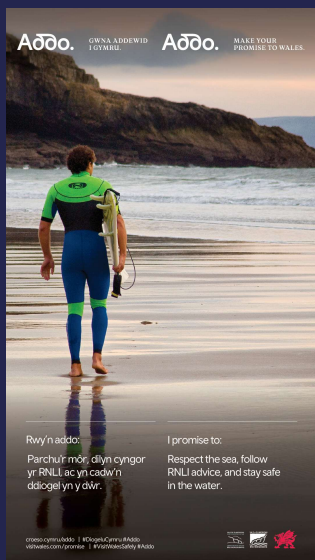


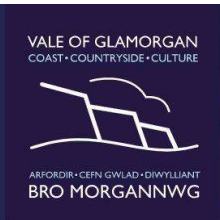


Vale of Glamorgan – ‘Addo’ Campaign

Visit the Vale’s ‘Addo’ campaign proudly brings the spirit of the Visit Wales 'Addo' promise to life locally—inviting visitors to discover the Vale responsibly, care for our breathtaking places and vibrant communities, and play their part in protecting what makes our destination so special for generations to come. Join us, and the many people who have already made their promise to Wales — to care for our communities and protect this epic land.

Our ‘Addo’ Gallery has generated 5.5k views since it launched on the 13th July





Digital Marketing Campaign – Summer 2026

Visit the Vale commissioned a digital marketing campaign in July 2026 to run for the summer. Building on the interim findings of the Visitor Survey, the campaign was designed to focus on the following:

Coastal Escapes . Stay a Little Longer . Taste the Vale . Dog Friendly Adventures

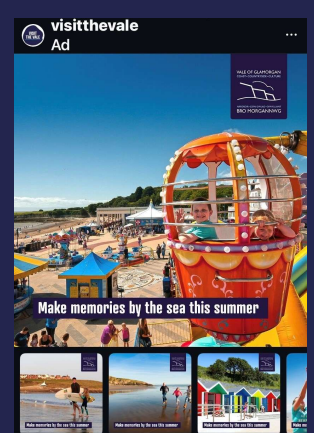
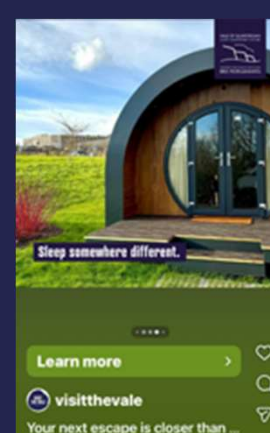
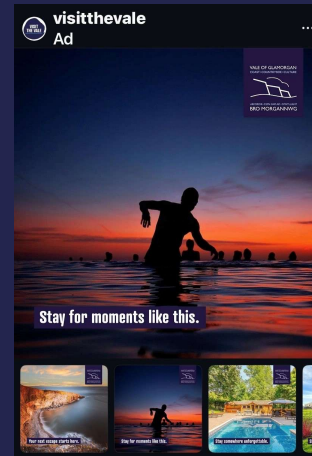
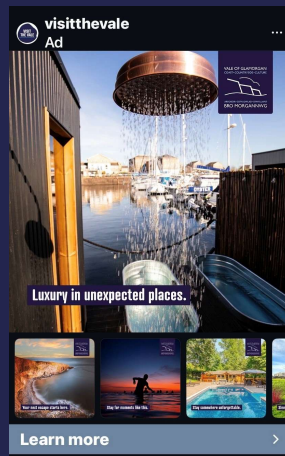
£10k income generated through our Filming administration was re-invested to directly fund the Summer Digital Campaign.

Here are the headline results:

- **2.2 Million** paid media impressions – putting the Vale in front of potential visitors during the key summer period
- Meta generated **26,560 landing page** views
- Google delivered more than **25,000** clicks
- Dedicated landing page on Visit the Vale website became the most viewed page during that period attracting more than **12,000 active users**
- GHC Video on You tube was watched **154,000 times** in 2 weeks and the Discover the Vale viewed **64,000 times**

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Digital Marketing Campaign – Monitoring

Page Users

Google Analytics

Tracks real time users to the website

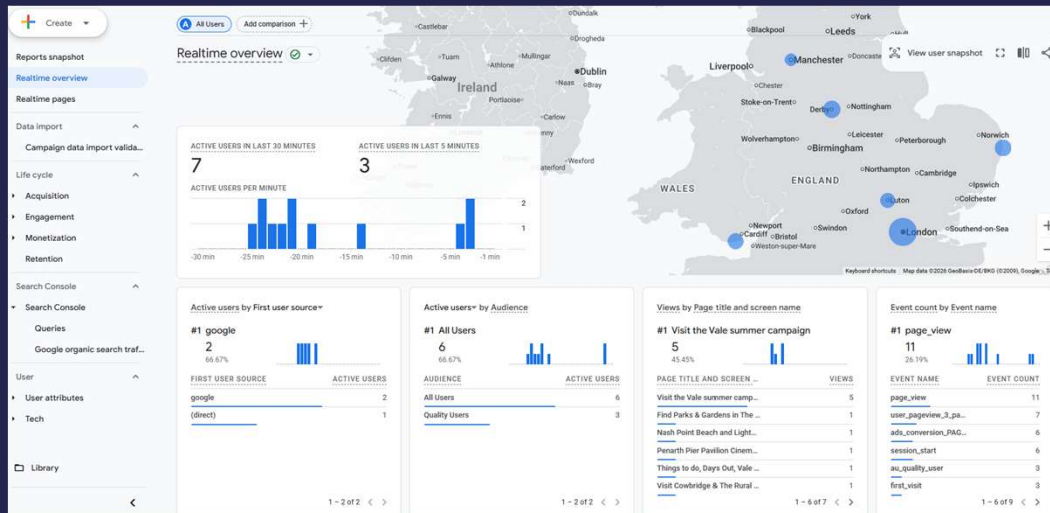
Monitors where the source originated from

Compares traffic trends

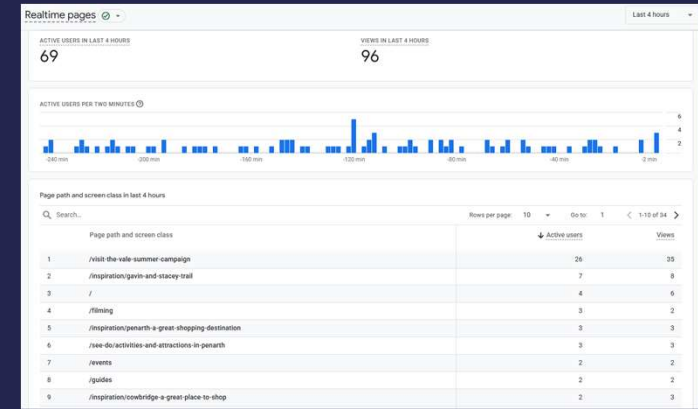
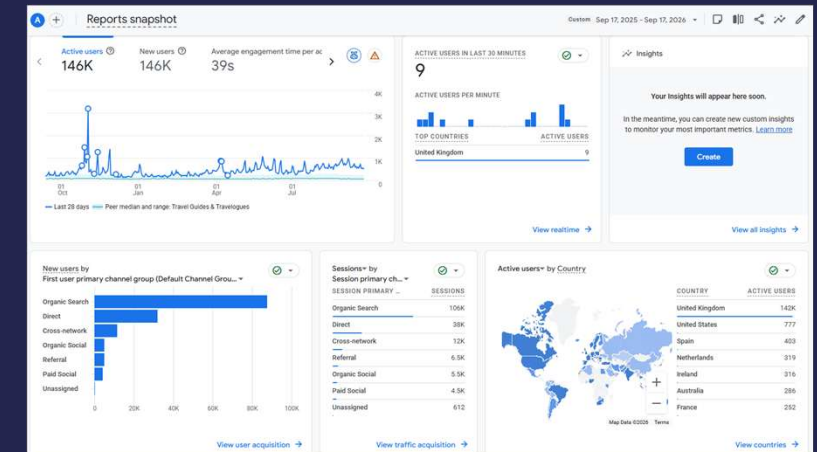
How long the users stays on your page/website

Tracks page views – what are people looking for

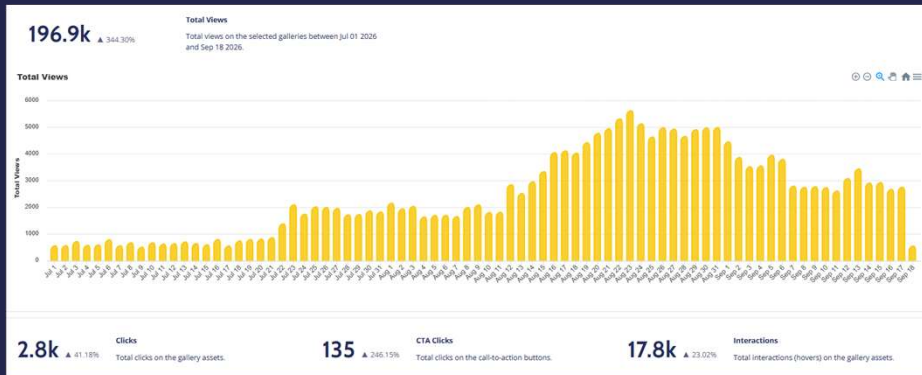
Real Time snapshot



Monitoring over time



Summer Campaign – Snapsea Gallery analytics



Learning and Recommendations

What the campaign tells us

1. Practical inspiration performs

The strongest Meta result came from the Family Summer Bucket List. Giving people specific ideas to save, share and act on was more powerful than relying on generic destination promotion alone.

2. Broad destination storytelling still matters

The Hero campaign was the second-best Meta performer, showing that an overarching emotional proposition can work well alongside more specific, utility-led content.

3. Stay messaging has value

Stay in the Vale delivered 4,257 landing page views. Future activity should continue to give overnight stays their own campaign strand, particularly where the objective is to increase visitor value rather than simply day-trip volume.

4. Google can be launched sooner next time

The £0.06 average CPC demonstrates strong potential for intent-led activity. With the account now established, future campaigns can use Google from the outset rather than losing part of the campaign window to account setup.

Summer Campaign – Overall results per platform

2,224,307
paid media impressions

£6,362.74
paid media spend

13,112
summer landing page views

1,099,076
Meta impressions

26,560
Meta landing page views

£0.15
average Meta cost / LPV

891,788
Google PMax impressions

25,267
Google clicks

£0.06
Google average CPC

233,443
YouTube impressions

140,196
YouTube TrueView views

£0.006
average YouTube CPV

DIOLCH – THANK YOU

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