

Meeting of:	Environment and Regeneration Scrutiny Committee
Date of Meeting:	Tuesday, 16 July 2024
Relevant Scrutiny Committee:	Environment and Regeneration
Report Title:	Vale of Glamorgan – Tourism and Events
Purpose of Report:	To provide an overview of the impact of Tourism and Events in the Vale of Glamorgan
Report Owner:	Deputy Leader and Member for Sustainable Places
Responsible Officer:	Marcus Goldsworthy, Director of Place
Elected Member and Officer Consultation:	This report does not require ward member consultation. Legal – Committee Reports. Operational Manager Accountancy. Operational Manager Regeneration. Principal Tourism and Marketing Officer.
Policy Framework:	This report is for Executive decision by the Cabinet
<p>Executive Summary:</p> <p>The report seeks to inform Environment and Regeneration Scrutiny Committee of the latest developments in the tourism sector and events within the Vale of Glamorgan. It also advises Committee of the impact the tourism industry has on the local economy. It also seeks to advise the committee of current and legislation and how that will impact the industry.</p>	

Recommendations

1. That Environment and Regeneration Scrutiny Committee (the Committee) consider the contents of the report.
2. That the Committee considers the impact of new and potential future legislation.
3. That the Committee refer this report and any comments to Cabinet to be considered.

Reasons for Recommendations

1. To enable the Environment and Regeneration Scrutiny Committee (the Committee) to consider the contents of the report.
2. To enable the Committee considers the impact of new and potential future legislation.
3. To enable Cabinet to consider the comments of the Environment and Regeneration Scrutiny Committee.

1. Background

- 1.1 The Tourism and Events team, part of the Regeneration division within the Place Directorate, is responsible for destination marketing, research, development, and management. Additionally, the team supports the events programme across the Vale of Glamorgan and collaborates with Economic Development teams to provide broader support to the trade.
- 1.2 Since December 2023, the team also took over responsibility for coordinating filming in the Vale of Glamorgan on behalf of all departments within the Council.

2. Key issues for consideration

- 2.1 The Council subscribes to the tourism research programme [STEAM](#). STEAM is a tourism economic impact modelling process which approaches the measurement of tourism from the bottom up, through its use of local supply side data and tourism performance and visitor survey data collection. It allows us to monitor tourism trends within a given destination.
- 2.2 In 2023 an accommodation stock survey was completed. The survey is conducted periodically to understand the changing landscape of the accommodation base in the Vale. Whilst Hotels, Inns, B&B's and Caravan & Camping properties remained consistent, the most notable difference was in the self-catering sector with an increase of properties from 42 in 2019, to 130 in 2023 more than a 200% increase in the number of businesses. This does not include the 164 Airbnb properties that are currently marketed in the Vale (duplications excluded).

- 2.3 Appendix A provides an overview of the current value of tourism. This is shown at a Vale of Glamorgan level and the wider South East Wales regional level. The results are the latest headline figures comparable against 2019 figures (last full year pre-covid). Covid undoubtedly had a negative impact on the industry across Wales and wider UK. In the last 10 years, tourism has grown by over 25% in value to the local economy, with self-serviced accommodation experiencing growth (over 65% in value compared to the serviced sector which has seen an overall decline of 14%).
- 2.4 Appendix B provides a collection of visual diagrams showing the 10 year trends in the visitor economy.
- 2.5 The day visitor market continues to dominate the Vale's visitor profile, which given our location is expected, and is consistent with the wider market in South East Wales. This is a key challenge. With day visitors accounting for 48% of our audience, moving this market to the higher spending staying visitor market remains a priority for the Council in the coming years.
- 2.6 Staying visitor numbers are consistent throughout the year with the Vale experiencing less peaks in high season in comparison to higher profile destinations, with visits spread across shoulder seasons making for a healthier balance in visitor impact.
- 2.7 The tourism sector is affected by and faces the prospect of new legislation. From April 2023, new legislation came into force for self-catering properties. In order to be liable for non-domestic rates, a property now needs to be available for let for at least 252 days (36 weeks) in a 12-month period, and actually let for at least 182 days (26 weeks). Those that fall below the 182 day threshold will now be liable for Council Tax.
- 2.8 Councils now have authority to introduce a premium on second homes and long-term empty properties. Legislation as of April 2023 now allows councils the ability to charge up to 300% council tax. VOG council introduced a 100% premium for 2023/24, 150% in 2024/5 and 200% in 2025/26.
- 2.9 Self-catering properties that are let for less than the statutory 182 days will no longer be eligible for NDR and could now be eligible for premium council tax rates of up to 200%.
- 2.10 Legislation is also expected to be introduced to the Senedd before the end of the 2024 requiring all commercial accommodation providers to have a license in place in order to trade.
- 2.11 The Welsh Government (WG) conducted a public consultation reviewing school term dates, the distribution of school holidays and length of terms in terms of how they can work better for learners, school staff and parents. It was announced in early June 2024 that a decision on timing will be deferred to next Senedd term and that any changes to the school year will not take place in 2025-26
- 2.12 The WG is currently consulting on proposals that will give Local Authorities powers to introduce a visitor levy. A tourism tax, or levy, is a charge which would

need to be paid by anyone staying overnight in Wales. It is proposed that any revenue generated covers or contributes to the costs which Authorities face as a result of the tourism industry.

- 2.13 A draft bill will be introduced into the Senedd by the end of 2024. The Senedd will scrutinise the draft bill and may propose amending it as part of their review, before deciding whether or not to endorse it by means of a vote. A decision is anticipated before the end of 2025. If the visitor levy is introduced, its estimated that the earliest date for introduction will be 2027. Each council will have to decide if they wish to introduce the levy in their area.
- 2.14 Given the challenges faced by the industry in recovery from Covid, the requirement to increase bed stays amongst an ever-growing number of self-catering properties, competing with a growing number of currently unlicensed properties through Air BnB and the inevitable impact of the current economic crisis, the industry is currently facing one of the most challenging times in recent years.
- 2.15 STEAM figures demonstrate the huge importance this industry places on the Vale, and though we are yet to reach pre-pandemic levels, at just 5% down on 2019 figures, the industry continues to prove itself in being resilient despite the challenges it has faced in recent times.
- 2.16 Over the last 10 years, the economic benefits of tourism have been distributed across multiple sectors:
- Accommodation accounts for just 11% of economic impact;
 - Food and Drink, Recreation, Shopping, and transport account for 89% (or £198m) positively affected;
 - At 32%, £93.5m is spent in indirect economic activity (e.g. supply chains, as hotels purchase food and drinks from local suppliers and use the services of local laundries, builders, banks, utility companies, etc.)

These figures demonstrate the positive economic impact a healthy visitor economy can have, not only directly to those at the front line, but also to support industries through indirect support.

- 2.17 The Vale of Glamorgan markets itself under the banner of Visit the Vale / Ymweld a'r Fro. Whilst independent, it also works in partnership with others to add value, collaborating with the 10 regional Authorities under the marketing banner of Southern Wales to target the travel trade visitor and Visit Wales for targeted consumer marketing.
- 2.18 All Local Authority areas in Wales retain their own marketing identity in order to raise the profile of their own region as a visitor destination. This allows the Vale to focus on its own unique assets and target specific markets. For example, walking is the biggest tourism driver for the Vale and where most website hits are seen.
- 2.19 The evolution of technology, changes in consumer behaviour, and the development of sophisticated marketing tools have collectively contributed to increasing the effectiveness of our digital marketing. Efforts in marketing the

Vale have had to evolve to ensure it keeps pace with changing marketing environment and a digital presence is more important than ever.

- 2.20 Since its launch in May 2021, the Visit the Vale website is constantly evolving and forms the platform through which to drive marketing.
<https://www.visitthevale.com>
- 2.21 Google analytics show who is visiting the site, where they are from, how they reached us, and view real time impact of any campaigns. Whilst the UK audience remains on top, this is followed by audiences in the US coming second, followed by Canada, Spain, Australia, Netherlands then France. The events pages have always been the most visited pages on the site, with spikes in traffic evident around key event marketing.
- 2.22 Social media presence is of equal importance. Visit the Vale currently has a combined following of circa 26k followers. In 2021, full year reach was 60,394. This increased by 818% in 2022 to 553,796, and to 821,663 in 2024.
- 2.23 Whilst payable targeted marketing is possible, the majority of reach is organic without any budget allocation, and therefore proves to be the most cost effective method of reaching the target audience. High quality video footage allows the team to highlight the Vale across multiple platforms. The use of the videos by partners and businesses is encouraged.
- 2.24 User generated content, or UGC has been a recent addition to the mix of marketing content. Software that allows the team to find, engage with users online to share their content with full permission. This has been a pivotal factor in building following and digital presence. Appendix D highlights some of the galleries curated through UGC which are featured on the website.
- 2.25 The team work with Press agencies to raise the profile of the Vale. Coverage across a number of high profile national publications has been achieved in the last 12 months. Regular hostings also take place such as with a Rough Guides travel journalist who will be sharing his adventures in the Vale very soon. Most recently the Vale hosted 3 dog friendly influencers who had a combined following of over 660,000. Businesses regularly work with the Council to ensure that the experience they have is the best it can possibly be. The stories, personalities and products are used to pitch for coverage and visits.

A selection of some of the coverage to date can be found in Appendix E.
- 2.26 Visit Southern Wales is a partnership of the 10 South East Wales Local Authorities that collectively market the wider destination to the group travel audience. This successful partnership allows the Vale to target audiences that would otherwise be outside the reach of the Council due to resources. The partnership regularly hosts familiarisation visits for UK and overseas group travel organisers, works in partnership with Visit Wales on their travel trade campaigns, and attends exhibitions such as World Travel Market, UK Destinations and The British Travel Trade Fair. Visit Wales and the Vale of Glamorgan Council work closely together. The aim is always to highlight the Vale as a destination within Wales.

- 2.27 The Vale has built a reputation for events in recent years and the Council works closely with private and bodies like Town Councils to ensure they go ahead smoothly and are well promoted. Synergies also exist with the Welsh Government Transforming Towns programme and Shared Prosperity Fund town centre themes.
- 2.28 Events coverage through our social media channels is the most popular marketing option. Single posts for popular events can reach audiences of over 75,000 and at key times in the run up to events, can demonstrate a growth in following based on the content we share.
- 2.29 Whilst the Events Officer continues to support the delivery of a calendar of events, the current financial climate and budget reductions have now forced a reduced programme of specifically council run events.
- 2.30 The Vale has experienced a growth in privately funded third-party events therefore the Events Officer's role now concentrates on working with the private sector in ensuring their events are H&S compliant, have the correct legislative agreements/*approvals* in place, and that all documentation is approved by the Event Safety Advisory Group (ESAG) in advance.
- 2.31 SPF Funding supported the temporary support of town centre events in each of the Vale's 4 towns for 2 years. Working with the Town Councils and Trader Groups, each town have been able to deliver a series of town centre based events with the primary aim to drive footfall into our retail areas. This was funded for 2023 and 2024.
- 2.32 The Events Network also continues to thrive with free events equipment made available to support all events in the Vale. SPF Funding has enabled the replacement of some of the equipment in recent times.
- 2.33 The Tourism team attend the all-Wales Research Partnership which consists of public, private and third sector partners all with a focus of delivering services to support the visitor economy. This alliance allows the Council to engage in research programmes across Wales, share best practice and collaborate on research programmes with others.
- 2.34 At the end of the Summer 2023, the Vale of Glamorgan was chosen as a pilot destination along with Snowdonia and Pembrokeshire to undertake a survey of our residents to understand local perception on tourism. Co-ordinated by Visit Wales, the research aimed to fully understand local sentiment on tourism; if they considered its impact positive or negative; how it impacts their lives and if they are supportive of tourism growth in the future. The headline results can be found in Appendix F.
- 2.35 Since Dec 2023, the Tourism and Events team are now the main point of contact for all filming enquiries in the Vale of Glamorgan. All enquiries received are guided through from enquiry to final booking on behalf of all departments within the council, acting as a point of contact throughout, streamlining the service both internally and externally.

- 2.36 An administration charge for this service is borne by the production companies, and all revenue generated goes to supplement the Tourism & Events budget which has been reduced in recent years.
- 2.37 Since December 2023 over 100 filming requests, generated just short of £50k income to the council, of which 20% will be re-invested to support Tourism and Events activities in the future. A new Filming portal has been developed as part of the Visit the Vale website www.filminthevale.com
- 2.38 In March 2024, the Council hosted a USA delegation of Film producers and who were visiting Wales as part of a UK wide familiarisation trip organised by the British Screen Commission. Working with Sgrin Cymru/Wales Screen we hosted the delegates at Penarth Pier Pavilion and showcased the Vale as a venue for filming.

3. How do proposals evidence the Five Ways of Working and contribute to our Well-being Objectives?

- 3.1 Long-term: Tourism and events ensure sustainable economic growth, creating jobs and supporting local businesses, fostering long-term community prosperity.
- 3.2 Prevention: Diversifying the economy through tourism and events mitigates economic risks and promotes sustainable practices, preserving natural and cultural resources.
- 3.3 Integration: Tourism and events integrate multiple sectors, achieving economic vitality, cultural richness, and environmental stewardship.
- 3.4 Collaboration: Tourism and events involve collaboration among local businesses, community groups, government agencies, and residents, ensuring diverse input and shared goals.
- 3.5 Involvement: Community engagement in tourism and event planning fosters ownership and community pride.

Well-being Objectives:

- 3.6 Economic Prosperity:
Tourism and events attract visitors, create jobs, and support local businesses, boosting local revenue.
- 3.7 Cultural and Community Well-being:
They showcase the region's cultural heritage, promote cultural exchange, and strengthen social bonds through community events.
- 3.8 Environmental Sustainability:
Eco-friendly tourism and sustainable events protect the natural environment and promote green practices.
- 3.9 Health and Well-being:
Tourism and events encourage active lifestyles and enhance social well-being through recreational opportunities and community gatherings.

3.10 Social Cohesion:

Bringing people together, tourism and events strengthen community ties and foster social inclusion.

4. Climate Change and Nature Implications

4.1 Positive Climate Change Implications:

Awareness and Education- Tourism and events can promote environmental awareness and eco-tourism, fostering sustainable practices.

Maintaining local spaces - Revenue from tourism supports the maintenance of public spaces and protected areas. Investment in sustainable infrastructure and green transport options reduces carbon footprints.

4.2 Negative Climate Change Implications:

Increased Carbon Footprint- Travel and large events contribute significantly to greenhouse gas emissions, but to counter this, local tourism is promoted in the Vale.

High tourist volumes can lead to habitat destruction, pollution, and resource strain. For example, Littering and BBQ damage can be issues at Cosmeston Country park and coastal resorts at peak periods.

5. Resources and Legal Considerations

Financial

- 5.1 There are no direct financial, legal or resource implications associated with this report at this time.
- 5.2 The introduction of the Statutory licencing scheme is likely to have implications on the delivery of the scheme at Local Authority level. Further details on this will be outlined by WG in the coming 12 months.

Employment

- 5.3 No implications.

Legal (Including Equalities)

- 5.4 Should a decision be made by WG to introduce a tourism levy, the full impact, benefit, resource and legal obligations would need be outlined at that time in order to inform any decision.

6. Background Papers

STEAM report 2023

Vale of Glamorgan – Resident perception survey 2023

APPENDIX A

STEAM Figures for the Vale of Glamorgan and the wider South East Wales region.

Results are presented retrospectively and are based on baseline data, e.g. occupancy rates, visit attraction numbers, visitor survey results etc.

Vale of Glamorgan

The following results are the latest headline figures for the Vale of Glamorgan, comparable against 2019 figures (last full year pre-covid)

- In 2022, Tourism was worth an estimated £292 million to the economy of the Vale of Glamorgan
- The Vale of Glamorgan attracted 4.1 million visitors (-5.3%)
- The Vale welcomed 3.5 million day visitors (-4%)
- Nearly 600,000 were staying visitors (-11.3%)
- Over 3,000 FTE jobs were supported by the industry (-4%)

Regional Tourism – South East Wales

Headline figures:

- Economic Impact £3.43Bn (-7.5% change on 2019)
- Visitor Numbers 36.88M (-15.4% change on 2019)
- Visitor Days 47.2M (-12.4% on 2019)
- FTEs 31,984 (-11.1% on 2019)

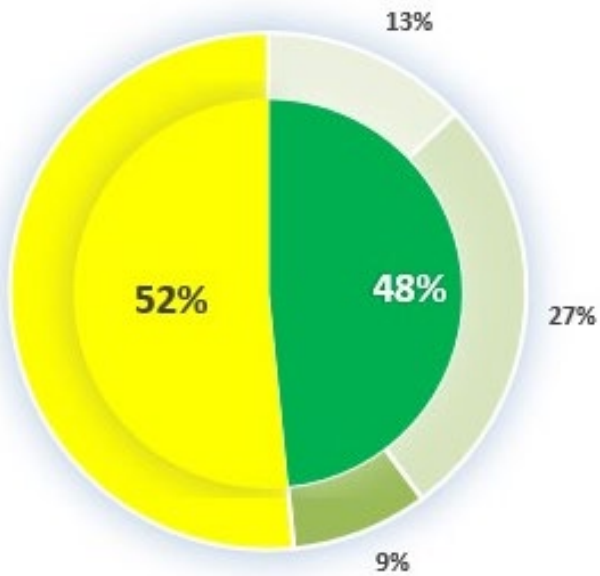
APPENDIX B



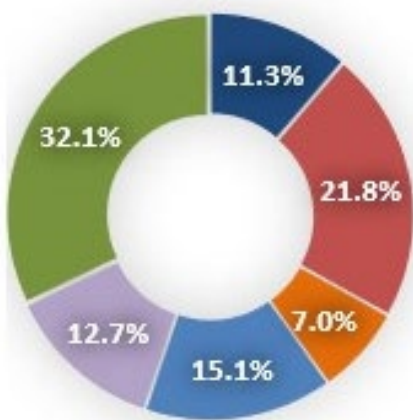
ECONOMIC IMPACT - 2022 Indexed - £M - Share of Total

TOTAL
£292.49m

	£M
Serviced	37.79
Non-Serviced	78.73
SFR	25.10
Staying Visitor	141.62
Day Visitor	150.87
Total	292.49



Sectoral Distribution of Economic Impact - £M including VAT Indexed to 2022



	2022	2012	+/- %
Accommodation	33.02	22.37	47.6%
Food & Drink	63.79	51.57	23.7%
Recreation	20.57	16.30	26.2%
Shopping	44.10	35.34	24.8%
Transport	37.07	29.61	25.2%
Indirect	198.55	155.18	27.9%
Total	292.49	228.96	27.7%

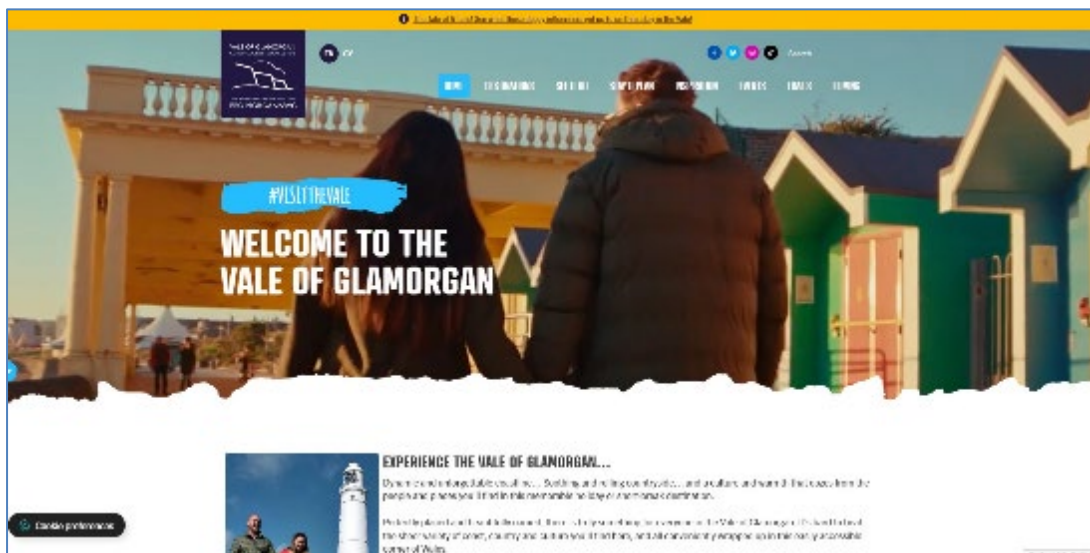
APPENDIX C

Marketing the Vale of Glamorgan

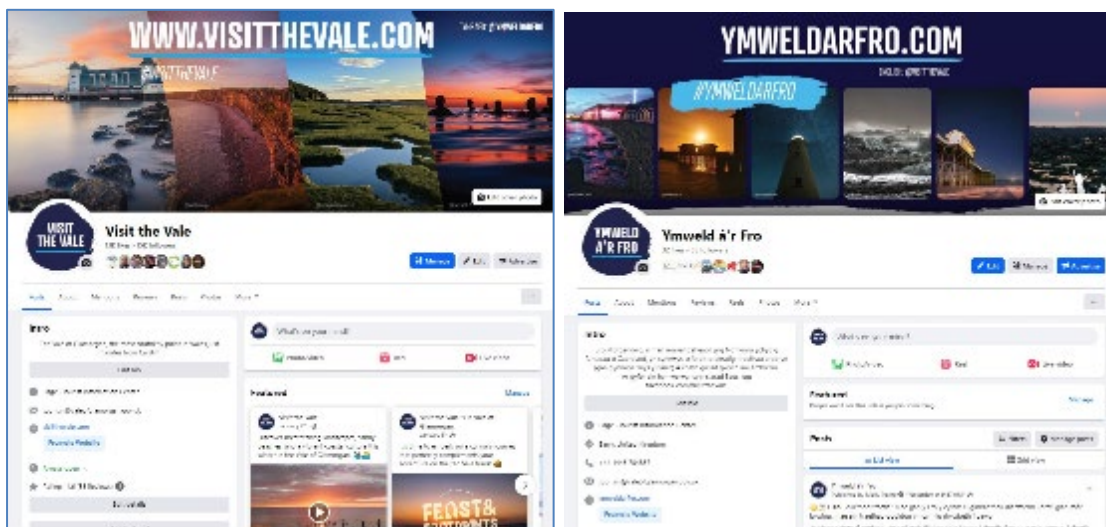
Visit the Vale website <https://www.visitthevale.com/>



Visit the Vale Website



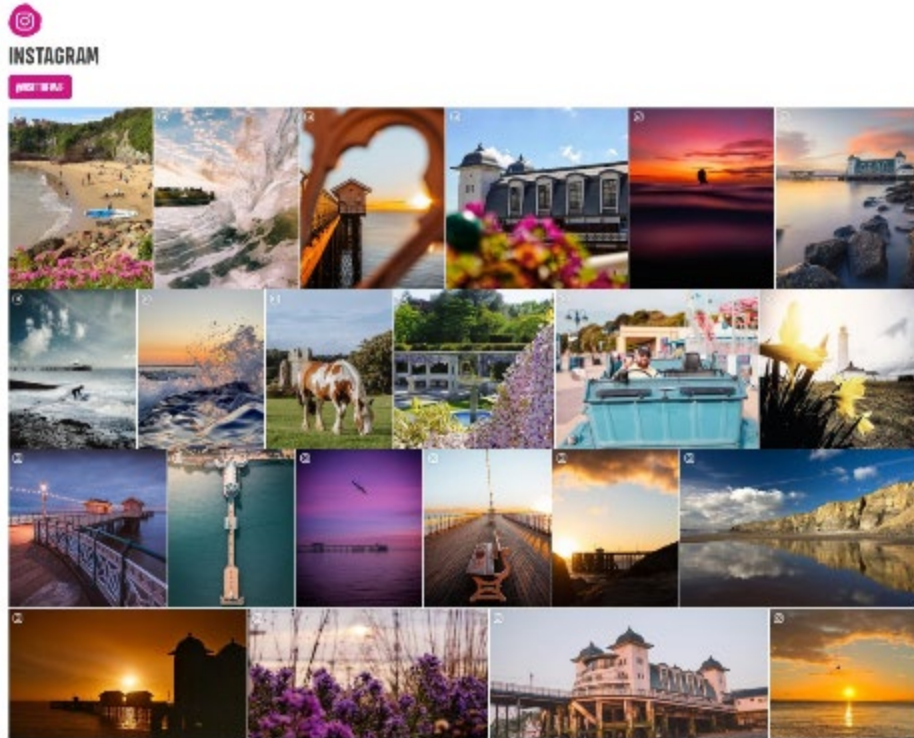
Facebook



APPENDIX D

User Generated Content galleries

Homepage



Eating Out



Dog Friendly



APPENDIX E

So far we have gained coverage in:

- The Telegraph
- Travel Daily Media
- The Times
- iNews
- Red online
- Top Sante

The UK's 30 prettiest autumn walks for families, from Northumberland woodland trails to Welsh coastal paths

Take a colourful stroll in one of these picturesque spots



Autumn is a wonderful time of year to enjoy the great outdoors. (Photo: Andy/Getty/©-)

Vale Trail 2

Route: Loop from Monkwearmouth, Vale of Glamorgan (find the route here)

Duration: From 4 miles (6.5km), 2+ hours



Monkwearmouth, PloUGH and Harrow is a beautiful area for history and nature. PloUGH and Harrow, West Wales

Like a winter ghost story? Monkwearmouth PloUGH and Harrow (dating to 1283) was once used as a quarry for shipwrecked seamen, stories of hauntings abound. The spectral "boy with ringlets" may not appear at this characterful old pub's new barn conversions just opposite, but they're great bases for heading walks on the Glamorgan Heritage Coast, followed by good home-cooked dishes after. The four-mile Monkwearmouth, Lighthouse and Harrow Walk loops via the last manned lighthouse in Wales and golden Cwm Nash beach, where waterfalls splash and sailors' bones sometimes poke from the high cliffs. It's also excellent for wild, cold swimming. If that's your thing, extend the walk to around 7.5 miles using the Atlantic College loop for more dramatic Jurassic coast and 13th-Century St Donat's Castle.

Get cozy: The PloUGH and Harrow (01656 850200; ploUGHandharrowmonkwearmouth.co.uk) has self-catering cottages from £400 for two nights.



Romantic feasts and countryside retreats at the UK's FIRST vineyard hotel

By Matthew Smith | 10 Jan 2024

TOP NEWS



Llanerch Vineyard is a chic countryside hotel and restaurant situated on a working vineyard

The first of its kind in the UK, Llanerch is situated in the heart of the Vale of Glamorgan in southern Wales. Llanerch provides a countryside retreat where couples can find time for each other, relax and reconnect. Llanerch offers romantic balcony rooms which are designed with couples in mind. Super long slow beds, fluffy robes, and a view of unspoiled rolling hills which can be enjoyed when coddling up on the balcony under Welsh wool blankets – could it be any more perfect? Llanerch is also home to an award-winning restaurant with AA two-rosette status, where visitors can enjoy locally sourced Welsh food. However, the star of the show is the restaurant's view, overlooking the vineyard, where the wine is made and the grapes are grown.

10 of the best luxury hotels in Wales

From fairy-tale castles to country house retreats, these are our top picks for an autumnal getaway in Wales

By Laura Vailant | Published 17 October 2023



Load image in gallery



Cardiff
OPEN: Open 24 hours
Quarry Walk, Penarth, CF34 5LW

Seven of the UK's best gardens that look even better in winter

Get out for some winter sun, or a walk in their colorful, open air space. See which ones bring the best of the year.



APPENDIX F

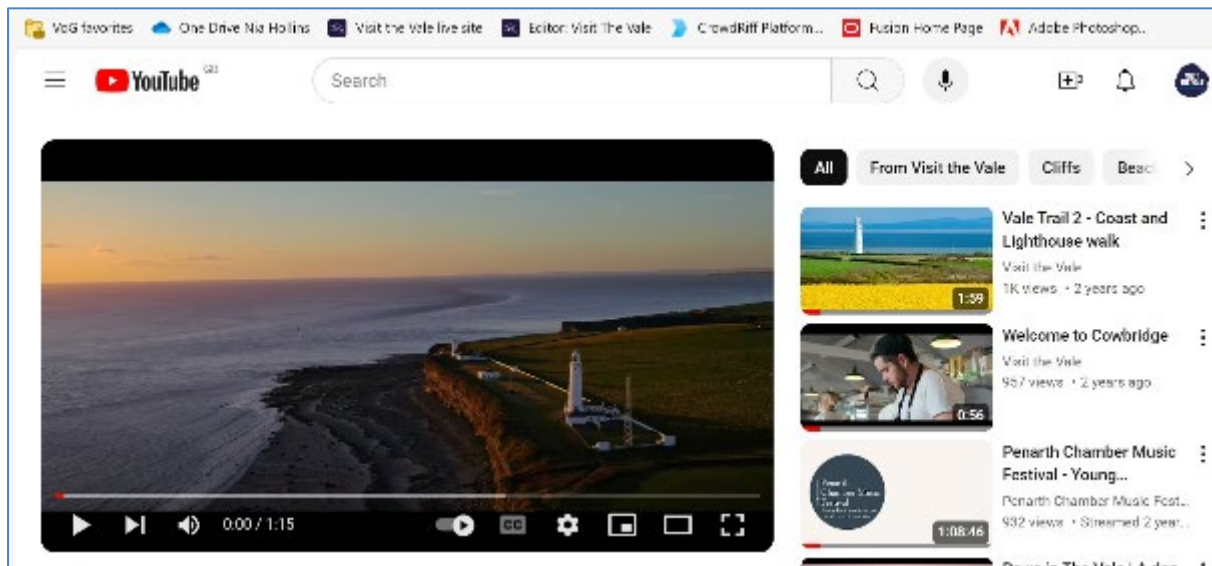
Resident perception survey – Vale of Glamorgan 2023

The overall perception towards tourism in the Vale of Glamorgan

1. Residents in the Vale of Glamorgan generally hold positive attitudes toward tourism and express a strong eagerness to contribute to its development. Their open suggestions further echo their desire to participate.
2. There is a positive attitude toward visitors, being proud to have them, with a desire to be friendly, and a push for growth. However, opinions are more divided when it comes to short-term rental accommodation, with residents feeling both its positive and negative consequences.
3. Regarding tourism's effects, there is a perceived positive impact on economic factors, though this is less pronounced in terms of cleanliness, public infrastructure, and environmental protection.
4. Further delving into tourism's effects on the Welsh language, a majority consider that these are positive, with Welsh culture being further promoted.
5. A majority of residents consider that there are negative consequences from tourism at least during some moments of the year, with parking, traffic, and cleanliness issues being mentioned the most.
6. Residents would like to see more visitors in the future for all types of segments. They are especially inclined to receiving more international visitors, as well as overnight visitors.
7. While the economic benefits of events are seen by most residents, many are also quick to cite infrastructural issues that suffer as a result of overcrowding.
8. Little differences exist between age groups when it comes to attitudes towards tourism, yet younger residents are slightly more tourismphobic.
9. On the other hand, those who work in tourism are clear proponents of it, being most likely to see its benefits for the Vale of Glamorgan.

APPENDIX G

Our videos are hosted on You Tube, from which we then embed the code to display on our website. The Visit the Vale You Tube channel can be found here - [Visit the Vale - YouTube](#)



[Spring/Summer Video](#)

[Autumn/Winter Video](#)

[Cowbridge & the Rural Vale](#)

[Llantwit Major & the Glamorgan Heritage Coast](#)

[Penarth](#)

[Barry and Barry Island](#)

We also have videos for each of the very popular 10 Vale Trails