Report to:	**TOURISM, ECONOMY AND RESOURCES SCRUTINY COMMITTEE**
Relevant Officer:	Philip Welsh, Head of Visitor Economy
Date of Meeting:	14 November 2018

TOURISM PERFORMANCE DATA

1.0 Purpose of the report

1.1 To provide information on tourism performance and trends using various indicators including number of visits; the value of the visitor economy and number of jobs supported; footfall on the Promenade and town centre; car parking; tram usage; and satisfaction ratings. There is additional information on sales of the Blackpool Resort Pass and usage of Tourist Information services.

2.0 Recommendation(s):

2.1 To consider the performance of Tourism and associated services and to identify any further areas for scrutiny as appropriate.

3.0 Reasons for recommendation(s):

3.1 To ensure constructive and robust scrutiny of the report, which has been requested by the Committee.

3.2a Is the recommendation contrary to a plan or strategy adopted or approved by the Council? No

3.2b Is the recommendation in accordance with the Council's approved budget? Yes

3.3 Other alternative options to be considered

Not applicable

4.0 Council Vision/Priority:

4.1 Tourism performance indicators are aligned to the Council's vision: *"The UK's number one family resort with a thriving economy that supports a happy and healthy community who are proud of this unique town".*

The relevant Priority in the Council Plan, is Priority 1: *Maximising growth and opportunity across Blackpool*

5.0 Background Information

5.1 This update provides data giving an insight into performance and trends within Blackpool's visitor economy.

The first report provides the full-year results for 2017 drawn from the national STEAM economic impact research. This is the principal research model undertaken by most destinations in the UK.

The second report shows the results of the Omnibus household survey covering the four months between May and August 2018. This information is supplemented by statistical information drawn from the monthly Visitor Economy Performance Indicators and covers items such as tram and car park patronage, Resort Pass sales, footfall and use of tourist information services.

Note that the principal difference between STEAM and Omnibus is that STEAM provides a summary of ALL visits (adults and children) whereas Omnibus only measures adult visits.

The third part of this update provides a summary of initial results from the 2018 Blackpool Has It All destination marketing campaign, co-funded by VisitBlackpool, Merlin Entertainments, Pleasure Beach, Winter Gardens, Blackpool Transport, Sandcastle Waterpark and other operators within the visitor economy.

5.2 The table below sets out the headline figures for 2017, drawn from the national STEAM research. This is essentially an economic impact model used by many destinations in the UK to measure trends within the visitor economy.

Year	2017	2016	2015	2014
Visitor Numbers (millions)	18.05	18.03	17.05	16.82
Day Visitors (millions)	14.6	14.56	13.69	13.42
Staying Visitors (millions)	3.44	3.47	3.36	3.40
Total Economic Impact (£bn)	1.52	1.44	1.37	1.33
FTE Tourism Jobs Supported	25,106	25,120	24,623	23,949

The STEAM data shows that Blackpool's visitor economy has been on an upward growth trajectory for the past four years. Although the volume of visitors shows only marginal growth between 2016 and 2017 (0.1%), the economic impact has grown by almost 2% from £1.44billion to £1.52billion.

Tourism in Blackpool accounts for 27% of all visits to the wider county of Lancashire. Note that the value of day visitors compared to staying visitors is significant. The 14.6m day visitors generated an estimated £500m in 2017 compared to the £1bn generated by 3.4m staying visitors. This emphasises the value of converting more day visitors into staying visitors.

The 2017 data shows that Blackpool's bed-stock has fallen marginally from 67,674 in 2016 to 67021 in 2017.

5.3 The second set of data is drawn from the Blackpool Omnibus Survey and the monthly Visitor Economy Performance Indicators. Omnibus is a national household survey which takes place three times a year over spring, summer and autumn. Sample size is usually around 4,000 respondents aged 16 and over, interviewed face-to-face. The four main questions asks respondents about the number of visits to Blackpool; the month their trip took place; the motivation for their trip; and overall satisfaction with their visit.

Omnibus Headline Results, May to August 2018

Table 1: Visits to Blackpool - Summer Season

(Millions)	2018	2017	2016
Total Adult Visits	**2.82**	3.23	2.75
Unique Adult Visitors	**2.10**	2.33	2.15

Table 2: Types of visit to Blackpool - Summer Season

(Millions)	2018	2017	2016
Overnight Stay	**1.46**	1.46	1.20
Holiday/Leisure	**0.93**	1.04	0.72
Specific Leisure Event	**0.10**	0.13	0.13
Specific Business Event	**0.01**	0.00	0.00
Business or Education	**0.12**	0.04	0.06
Non-leisure	**0.01**	0.00	0.00
Visit Friends	**0.30**	0.25	0.30

	2018	2017	2016
A day trip	**1.32**	1.71	1.39
Holiday/Leisure	**0.84**	1.19	1.24
Specific Leisure Event	**0.06**	0.13	0.03
Specific Business Event	**0.00**	0.03	0.00
Business or Education	**0.11**	0.06	0.10
Non-leisure	**0.01**	0.05	0.01
Visit Friends	**0.30**	0.25	0.01

Table 3: Timing of visit - Summer Season

	2018	2017	2016
May	**0.55**	0.72	0.59
June	**0.71**	0.60	0.70
July	**0.51**	0.64	0.49
August	**1.00**	1.19	0.87

The tables above show that while the number of overnight stays stayed strong compared to previous year (and significantly ahead of 2016), the volume of day visits fell by almost 400,000 compared to 2017.

Day trips tend to be more volatile in that they can be easily influenced by external factors. During this particular period, May to August, the resort suffered unprecedented disruption on its rail services and it is hard not to draw the conclusion that this has had a significant adverse effect on the visitor market.

During that four-month period, the resort was affected by a catalogue of cancellations and delays caused initially by timetabling issues across the Northern Rail network, followed by closures on key routes including Manchester and Liverpool, and further exacerbated by strike action targeted at major events and key weekends, including the Air Show weekend.

The Omnibus survey shows that the total number of adult visits fell from 3.2m in 2017 to 2.8m in 2018. Overnight stays accounted for 1.46m visits, the same as previous year, but day trips fell from 1.7m to 1.3m.

The biggest falls came in May, when the introduction of new timetables created chaos on the Northern network. The attempts to resolve these issues resulted in Blackpool and the Lake District bearing the brunt of the subsequent cancellations.

In August, Blackpool's services were repeatedly affected by a mixture of strike action and cancellations on key routes.

As the summer progressed it became clear that many potential visitors had lost all faith in the rail services as a means of getting to and from Blackpool.

Over that same four-month period, the volume of inbound travellers coming into Blackpool by rail fell by an average of 5% and peaking at a deficit of 10% in August. Year to date, inbound rail travel is more than 15% down.

Table 4: Single-most important aspect of visit - Summer Season

	2018	2017
The Coastal Location	22%	20%
The Pleasure Beach	22%	25%
Family Friendly Attractions	15%	17%
Visiting Friends and Relatives	12%	11%
Entertainment / Night Life	9%	7%
Events Offer	5%	3%
Sporting Activities	3%	2%
Other / Don't Know	11%	15%
Total	100%	100%

Table 5: Events attended

Blackpool Illuminations Switch On	6%

Blackpool Air Show	5%
Ride the Lights	5%
Dance Festivals	3%

Table 6: Perceptions of visit to Blackpool		
	2018	2017
Satisfied	88%	88%
Not Satisfied	12%	12%

Additional Information: Visitor Economy Performance Indicators, May to August 2018

Town Centre: Monthly Footfall (24hr)

Month	2018	2017
May	2,042,641	1,817,313
June	1,926,289	1,965,484
July	2,245,067	2,408,926
August	2,787,874	3,208,774
Total	**9,001,872**	**9,400,497**

Promenade: Monthly Footfall (24hr)

Month	2018	2017
May	574,414	450,517
June	496,305	513,024
July	686,856	710,383
August	968,271	1,083,069
Total	**2,725,846**	**2,756,993**

Council Car Parks: Monthly Ticket Sales

Month	2018	2017
May	105,805	91,408
June	94,791	87,196
July	101,521	107,305
August	126,067	133,861
Total	**428,184**	**419,770**

Monthly Tram Passengers

Month	2018	2017
May	467,023	409,409

June	472,253	417,903
July	604,211	595,015
August	673,508	705,181
Total	**2,216,995**	**2,127,508**

Tourist Information Centre: Monthly Visits

Month	2018	2017
May	5,121	4,783
June	5,846	4,296
July	12,391	12,771
August	26,241	30,850
Total	**49,599**	**52,700**

VisitBlackpool.com: Unique Monthly Website Visits

Month	2018	2017
May	110,244	105,397
June	130,781	115,567
July	183,533	172,382
August	270,534	292,451
Total	**695,092**	**685,797**

Resort Pass: Monthly Sales

Month	2018	2017
May	1,155	1,338
June	1,852	1,369
July	4,061	3,596
August	4,272	3,330
Total	**11,340**	**9,633**

The May to August period saw exceptional sales of the Resort Pass, which year to date is more than 2,000 sales ahead of last year. The pass is only of value to people staying for two or more days and is an effective method of promoting overnight stays as opposed to day trips.

5.4 **Destination Marketing**

The Blackpool Has It All destination marketing campaign for 2018 ran from Easter to October half-term incorporating a mixture of TV advertising, digital activity and PR.

This year, for the first time, the PR activity was split – with bespoke activity in Scotland and England. The results to date are impressive:

We have had eight pieces featured on TV during the period (compared to one in 2017) with items on BBC Breakfast, This Morning, Blue Peter, North West

Tonight and STV in Scotland.

We organised a total of 17 individual press trips into resort and this has resulted in positive coverage across 19 national and more than 100 regional print and online publications. A total of 28 pieces appeared in Scottish media.

Digital activity was primarily aimed at driving sales of the Resort Pass and the success of that is illustrated by the high volume of sales.

The full results of the TV activity will not be known until the end of the year. But an initial awareness campaign has been undertaken and this shows

6.0 Legal considerations:

6.1 None

7.0 Human Resources considerations:

7.1 None

8.0 Equalities considerations:

8.1 None

9.0 Financial considerations:

9.1 None

10.0 Risk management considerations:

10.1 None

11.0 Ethical considerations:

11.1 None

12.0 Internal/ External Consultation undertaken:

12.1 Not applicable

13.0 Background papers:

13.1 None