Report to:	**TOURISM, ECONOMY AND COMMUNITIES SCRUTINY COMMITTEE**
Relevant Officer:	Philip Welsh, Head of Tourism and Communications
Date of Meeting	19 June 2019

TOURISM PERFORMANCE UPDATE

1.0 Purpose of the report

1.1 To consider an update on Tourism Performance, including the Destination Marketing Campaign's results from 2018 and plans for 2019.

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 Tourism and associated services, 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

3.4 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.

5.1.1 The first report provides the results of the Omnibus household survey covering the first four months of 2019. Note that Omnibus differs from the annual STEAM survey in that STEAM provides a summary of all visits (adults and children) whereas Omnibus only measures adult visits. The STEAM full-year results for 2018 will be available in late summer.

5.1.2 The second part of the report highlights some of the statistics drawn from the monthly Visitor Economy Performance Indicator reports over the same four-month period, covering items such as tram and car park patronage, Resort Pass sales, footfall and use of tourist information services.

5.1.3 The third part of this update provides a summary of headline results from the 2018 Blackpool Has It All destination marketing campaign. This activity, which saw an investment of over £600k in destination marketing and promotion, is co-funded by VisitBlackpool, Merlin Entertainments, Pleasure Beach, Winter Gardens, Blackpool Transport, Sandcastle Waterpark and other operators within the visitor economy.

5.2 **Omnibus Visitor Survey, January to April 2019**

5.2.1 The tables below show that the 2019 tourism season got off to a very positive start with both February half-term and Easter delivering strong growth in visitor numbers.

5.2.2 The survey shows that the number of adult visits between January and April grew by almost 400,000 compared to the same period in 2018.

5.2.3 The bulk of the growth was seen in February and April, where exceptional weather gave the resort one of its busiest Easter weekends on record.

5.2.4 All of the main visitor attractions showed significant growth in April, with one reporting its highest ever visitor numbers for the period.

5.2.5 Encouragingly, the number of overnight stays over the four months almost doubled – from 550,000 in 2018 to just over a million in 2019.

5.2.6 **i) Headline Visitor Numbers**

Table 1: Visits to Blackpool - Spring Season

(Millions)	2019	2018
Total Adult Visits	**1.79**	1.42
Unique Adult Visitors	**1.13**	0.92

5.2.7 **ii) Type of visit**

Table 2: Types of visit to Blackpool - Spring Season

(Millions)	2019	2018		2019	2018
Overnight Stay	**1.07**	0.55	**A day trip**	**0.67**	0.89
Holiday/Leisure	**0.53**	0.31	Holiday/Leisure	**0.48**	0.33
Specific Leisure Event, Conf or Ex	**0.05**	0.04	Specific Leisure Event, Conf or Ex	**0.03**	0.03
Specific Business Event, Conf or Ex	**0.00**	0.01	Specific Business Event, Conf or Ex	**0.00**	0.05
Business or Education	**0.09**	0.04	Business or Education	**0.05**	0.26
Non-leisure	**0.00**	0.01	Non-leisure	**0.04**	0.03
Visit Friends	**0.40**	0.14	Visit Friends	**0.08**	0.20
Don't knows	*0.06*	*0.03*			

5.2.8 **iii) Timing**

Table 3: Timing of visit - Spring Season

(Millions)	2019	2018
January	**0.31**	0.23
February	**0.45**	0.26
March	**0.31**	0.47
April	**0.65**	0.45
Unsure	*0.05*	*0.05*

5.2.9 **v) Reasons For Visiting**

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

	2019	2018
The Pleasure Beach	16%	11%
Family Friendly Attractions	16%	9%
The Coastal Location	14%	23%
Visiting Friends and Relatives	14%	15%
Don't Know	11%	5%

Entertainment / Night Life	9%	5%
Other Aspect	8%	10%
Business Offer	5%	3%

5.3 Visitor Economy Performance Indicators, January to April 2019

Ticket Sales

The hard indicators with the set of Visitor Economy Performance Indicators (ticket sales) show significant growth in numbers of tram and rail passengers compared to 2018 and in the sales of the Resort Pass. Although patronage on car parks is slightly down, the revenue performance is well ahead of last year, suggesting that car park users are staying for longer periods.

5.3.1 Council Car Parks: Monthly Ticket Sales

Month	2019	2018
January	56,764	56,680
February	67,171	66,802
March	74,177	73,038
April	94,116	96,639
Total	**292,228**	**293,159**

* Note that Pay & Display ticket sales at Council operated car parks continue to rise year on year with over 1.1 million sales in 2018.

5.3.2 Monthly Tram Passengers

Month	2019	2018
January	212,465	200,050
February	258,010	228,303
March	271,853	283,180*
April	407,784*	377,175
Total	**1,150,112**	**1,088,708**

* Note that the tram network goes from strength to strength with almost 5.2 million passengers using the service in 2017. In 2018, monthly passenger records were set in March whilst April 2019 achieved its best figure to date.

5.3.3 Inbound Rail: Monthly Sales

Month	2019	2018
January	39492	30528
February	66399	43152
March	67073	49658
April	No data available	No data available
Total	**172,964**	**123,338**

∗ Note that 2018 passenger numbers were negatively impacted by rail electrification works

5.3.4 Resort Pass: Monthly Sales

Month	2019	2018
January	38	115
February	100	166
March	607	498
April	1,383*	751
Total	**2,128**	**1,530**

∗ Note that a monthly Resort Pass sales record was set in April 2019.

5.3.5 Footfall

Footfall figures in both the town centre and Promenade are down compared to last year, though there are probably different reasons for this.

5.3.6 Town centre footfall is undoubtedly suffering in towns and cities throughout the UK in what is a very volatile period for the retail industry and Blackpool is clearly not immune to that.

5.3.7 Promenade footfall is only measured on the east side of the Promenade close to Coral Island and does not necessarily reflect footfall on the west side of the tram tracks.

5.3.8 Hence, during periods of good weather when many visitors head for the beach (as experienced over the February and Easter holidays), these footfall movements are not counted.

5.3.9 A more accurate indicator of activity on the seafront is probably the number of tram tickets sold – both February and April (which include the school holiday periods) as illustrated in the table above.

5.3.10 Town Centre: Monthly Footfall (24hr)

Month	2019	2018
January	712,408	831,932
February	788,722	837,412
March	761,672	842,255
April	1,245,363	1,300,214
Total	**3,508,165**	**3,811,813**

5.3.11 Promenade: Monthly Footfall (24hr)

Month	2019	2018
January	107,398	120,041
February	167,892	181,346
March	143,355	148,763
April	330,147	406,711
Total	**748,792**	**856,861**

5.3.12 Visitor Information

5.3.13 The Tourist Information Centre (TIC) on the Tower Festival Headland continues to attract significant numbers of visitors. The centre is an information point, but also a place where visitors can buy attraction tickets at a competitive price. April, which included the Easter holidays, recorded a record number of visits for the month.

5.3.14 The VisitBlackpool.com website complements the TIC offer by giving prospective visitors a comprehensive picture on attractions, events, shows and accommodation.

5.3.15 Over the course of a year, it attracts more than 1.5m users.

5.3.16 *Note: February 2018 website activity was distorted by the Britney Spears concert announcement, which gave a huge spike in site visits. April this year was adversely affected by security issues, which took the site down for two days over the holiday period.

Tourist Information Centre: Monthly Visits

Month	2019	2018
January	979	1,271
February	1,799	1,645
March	2,814	2,911
April	4,363*	4,174
Total	**9,955**	**10,001**

* Note that a monthly TIC visits record was set in April 2019.

VisitBlackpool.com: Unique Monthly Website Visits

Month	2019	2018
January	63,201	61,510
February	66,361	77,359
March	77,921	72,364
April	82,738	90,161
Total	**290,221**	**301,394**

5.4 **Blackpool Has It All Destination Marketing 2018/19**

5.4.1 The annual destination marketing activity in association with Merlin was launched in 2014 under the banner of "Blackpool's Back".

5.4.2 The key objective of the multi-media campaign is to drive volumes of visitors to the resort, but also help change public perceptions of the resort by showcasing the huge investment that has been made in attractions and tourism infrastructure.

5.4.3 Since then the campaign has evolved into "Blackpool Has It All" and the number of funding partners has grown each year.

5.4.4 In 2018, the campaign followed a tried and tested formula of TV advertising, digital activity and PR. These are some of the headline results:

5.4.5 **Digital**

5.4.6
- Resort Pass sales (which is one of the main calls to action for the campaign) reached 17,102, an increase of 2,218 on 2017 making it the most successful year
- We had over 15 million impressions from our Facebook content/video and ads. We targeted families with children and younger couples (under 35) targeting the North of England, Scotland and the Midlands
- Display ads generated 6.5 million impressions and 23,500 clicks to the VisitBlackpool website with 3,809 Resort Pass purchases
- The TV ad on YouTube was served 244,000 times to audiences in the key regions.

5.4.7 **TV Ad**

5.4.8
- The 2018 campaign saw the creating of a new TV ad, replacing the one that had run since the start of the destination marketing activity in 2014. The ad was purposely created in a modular format, so that elements can be easily swapped in future years.
- The ad ran in Scotland from mid-June with the intention of hitting one of Blackpool's key target markets ahead of the school summer holidays. The weighting and duration of this part of the destination campaign allowed us to reach almost 60% of the target audience in Scotland with the average housewife plus children viewer getting more than a dozen opportunities to see the ad across the campaign.
- The remainder of the TV advertising was focused on the north of England from mid-July to the end of August, with some upweighting towards the Granada region. The scale of activity allowed us to reach more than 50% of the target audience.
- The standard TV activity was complemented by Video On Demand (VOD) advertising which is an essential part of the mix giving the fragmentation of the broadcast landscape and the increasing propensity for viewers to watch TV on "catch up". VOD is typically

watched by a younger demographic, helping to target the 16-25 and young couple audiences.

5.4.9 **Research from TV ad**

5.4.10
- 44% of people said that they had seen the resort advert
- 87% said that they strongly agreed/agreed that the TV ad would encourage people to visit Blackpool.
- 83% said that they strongly agreed/agreed that the "the ad created an appealing impression for me"
- 69% said that they strongly agreed/agreed that the TV ad increased their awareness of the attractions available in the resort.
- 71% said that they strongly agreed/agreed that the TV ad increased their awareness of the events that happen in Blackpool.

5.4.10 **PR Activity**

5.4.11 This was split across two distinct areas – UK-wide and a more bespoke campaign for Scotland. It yielded the following results:

5.4.12
- Eight TV features (compared to one in 2017) including BBC Breakfast, This Morning, Blue Peter, North West Tonight and Scottish TV
- 17 Press trips – focused on nationals and the regionals with the highest circulation
- 19 national newspaper print or online hits
- 103 regional publication hits.
- Two national radio hits
- Two YouTube films on the resort that each secured in excess of 100,000 views
- More than 100 social posts including BBC Breakfast, Blue Peter, North West Tonight)

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