Report to:	**TOURISM, ECONOMY AND RESOURCES SCURITNY COMMITTEE**
Relevant Officer:	Philip Welsh, Head of Visitor Economy
Date of Meeting	06 June 2018

TOURISM PERFORMANCE UPDATE

1.0 Purpose of the report:

1.1 To provide information on tourism performance 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 and rail usage; satisfaction ratings and events. There is additional information on sales of the Blackpool Resort Pass and usage of Tourist Information services. This report also includes the summary findings of the rolling visitor research which comprises face to face interviews undertaken in the resort each month.

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 report provides four sets of research data, all of which provide an insight into Blackpool's visitor economy.

The first set of data is the Blackpool Omnibus Survey. This 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 following: Number of visits to Blackpool, the month their trip took place and the aspect of their trip that led them to visit Blackpool. Note that Omnibus only measures adult visitors, hence the differential between the annual STEAM survey which measures adults and children. The figures below show the comparison between 2017 and 2016.

Visits to Blackpool

(Millions)	**2017**	2016
Total Adult Visits	8.35	7.81
Unique Adult Visitors	5.50	5.57

Timing of Visits

	2017	2016
Jan-Apr (Spring)	2.22	2.25
May-Aug (Summer)	3.21	2.75
Sep-Dec (Autumn)	2.92	2.81
Don't knows	0.34	0.78

Types of Visit to Blackpool

(Millions)	2017	2016
Overnight Stay	3.14	3.63
Holiday/Leisure	1.99	1.84
Specific Leisure Event	0.21	0.48
Specific Business Event	0.01	0.05
Business or Education	0.19	0.29
Non-leisure	0.06	0.03
Visit Friends	0.68	0.95
Don't knows	0.29	0.71

	2017	2016
A day trip	4.98	3.84
Holiday/Leisure	3.37	2.68
Specific Leisure Event	0.37	0.20
Specific Business Event	0.08	0.01
Business or Education	0.28	0.33
Non-leisure	0.26	0.14
Visit Friends	0.63	0.48

Single-Most Important Aspect of Visit by Season 2017

Spring	Summer	Autumn
The Coastal Location (20%)	The Pleasure Beach (25%)	Blackpool Illuminations (23%)
Visiting Friends and Relatives (13%)	The Coastal Location (20%)	The Pleasure Beach (14%)
Family Friendly Attractions (12%)	Family Friendly Attractions (17%)	Retail and Shopping Offer (13%)
Don't Know (12%)	Visiting Friends and Relatives (11%)	The Coastal Location (11%)
The Pleasure Beach (11%)	Entertainment / Night Life (7%)	Family Friendly Attractions (11%)
Retail and Shopping Offer (7%)	Cultural Offer (6%)	Entertainment / Night Life (9%)
Entertainment / Night Life (6%)	Retail and Shopping Offer (5%)	Visiting Friends and Relatives (7%)

5.2 The second set of data is drawn from the monthly Visitor Economy Performance Indicator (VEPI) reports. These provide a “snapshot” of levels of activity in the resort for 2017 compared to 2016, including sales of the Blackpool Resort Pass; tram usage;

footfall; inbound rail travel; car park usage; visits to the Tourist Information Centre; and usage of the VisitBlackpool website. . As these are "real time" statistics they help us to observe and identify trends in the visitor market.

The various tables are set out below:

Town Centre: Monthly Footfall (24hr)

Month	2017	2016
January	*999,125	759,349
February	1,075,565	1,027,744
March	1,215,996	1,233,574
April	*1,680,054	1,454,419
May	1,817,313	1,839,345
June	1,965,484	1,934,011
July	2,408,926	2,225,619
August	*3,208,774	2,688,159
September	2,350,978	2,416,582
October	2,558,546	2,620,629
November	1,415,382	1,308,193
December	975,919	1,223,614
Total	**21,672,064**	**20,731,238**

Promenade: Monthly Footfall (24hr)

Month	2017	2016
January	*125,093	90,966
February	176,450	175,630
March	231,423	245,268
April	407,645	366,617
May	450,517	494,222
June	513,024	530,240
July	710,383	724,099
August	*1,083,069	955,116
September	*776,293	772,805
October	*784,190	760,334
November	*272,909	269,521
December	152,263	166,567
Total	**5,683,259**	**5,551,385**

* Note that the January 2017 Promenade foot count total is a monthly record for the Coral Island sensor. Monthly records were also set in 2017 for four consecutive months covering August, September, October and November.

Tourist Information Centre: Monthly Visits

Month	2017	2016
January	1,452	1,434
February	2,774	3,098
March	2,522	2,147
April	*4,144	3,289
May	4,783	4,515
June	4,296	5,167
July	12,771	12,978
August	30,850	32,353
September	12,401	12,102
October	16,084	16,260
November	2,400	2,556
December	1,034	1,231
Total	**95,511**	**97,130**

* A monthly record was set in April 2017.

VisitBlackpool.com: Unique Monthly Website Visits

Month	2017	2016
January	84,909	73,024
February	86,266	77,402
March	95,751	89,526
April	102,698	99,698
May	105,397	126,862
June	115,567	108,081
July	172,382	208,020
August	292,451	330,019
September	193,843	301,305
October	178,938	226,601
November	75,568	122,090
December	38,530	63,582
Total	**1,542,300**	**1,826,210**

* Note that the introduction of a new website has distorted some of the year-on-year comparisons from last July onwards. The old website was "double counting" visits to the website; the new version has eliminated that.

Resort Pass: Monthly Sales

Month	2017	2016
January	0	38
February	148	248
March	486	883
April	*1,150	1,000
May	1,338	1,475
June	1,369	1,745
July	3,596	4,040
August	3,330	3,511
September	1,433	1,438
October	1,913	2,439
November	*51	5
December	*6	0
Total	**14,820**	**16,822**

Monthly Rail Passengers (Inbound)

Rail Reporting Period (Approximate Month)	2017	2016
Period 11 (January)	46,154	48,341
Period 12 (February)	63,232	70,105
Period 13 (March)	62,389	72,844
Period 1 (April)	115,106	106,767
Period 2 (May)	102,512	*105,469
Period 3 (June)	113,287	*126,264
Period 4 (July)	113,193	121,832
Period 5 (August)	178,634	*191,030
Period 6 (September)	134,589	*152,840
Period 7 (September)	94,269	*104,864
Period 8 (October)	92,297	*98,478
Period 9 (November)	30,874	56,310
Period 10 (December)	25,737	*46,946
Total	**1,172,273**	**1,302,091**

* The recent rail figures have been negatively impacted by the electrification works, which resulted in the temporary closure of the Blackpool to Preston rail links.

Monthly Tram Passengers

Month	2017	2016
January	*208,055	171,567
February	*234,096	215,895
March	*281,398	280,133
April	*430,640	358,864
May	*409,409	395,736
June	417,903	425,044
July	*595,015	593,874
August	*705,181	684,586
September	617,848	610,893
October	677,658	753,941
November	*360,766	333,902
December	*237,308	231,875
Total	**5,175,277**	**5,056,310**

* The tram network goes from strength to strength with almost 5.2 million passengers using the service in 2017. This was largely due to a busy start to 2017, which culminated in unparalleled numbers of passengers using the service over five consecutive months from January to May; furthermore unprecedented passenger figures were also recorded in July, August, November and December 2017.

Council Car Parks: Monthly Ticket Sales

Month	2017	2016
January	*58,276	49,522
February	*67,589	62,192
March	76,197	77,469
April	*105,379	84,250
May	91,408	93,462
June	*87,196	81,905
July	*107,305	106,647
August	*133,861	130,130
September	115,189	110,929
October	134,378	141,672
November	75,852	72,735
December	50,043	69,305
Total	**1,102,673**	**1,080,218**

* Pay & Display ticket sales at Council operated car parks continue to rise year on year with over 1.1 million sales in 2017. Monthly sales records were achieved in January, February, April, June, July and August.

5.3 The third set of data is drawn from the rolling visitor survey which commenced in January 2017. The survey was developed and undertaken by Infusion Research with input from Blackpool Council's Corporate Delivery unit. Between January and December 2017, a total of 3,746 face-to-face street interviews were conducted across a number of key visitor locations in Blackpool. 2,551 (68%) of those interviewed were visitors to Blackpool. The results have been weighted by age, gender, visitor origin and season in line with the overall visitor profile identified in the previous three years of Blackpool Tourism Omnibus surveys. This ensures results more accurately represent the demographics of visitors in Blackpool. This survey is also used to explore visitor perceptions of the resort.

Top Line Figures	Percentage
Positive perceptions of Blackpool	86%
Return visitors	91%

Where They Come From	Percentage
North West	34%
Lancashire	21%
South	13%
Midlands	10%
Yorkshire & Humber	10%
Scotland	6%

Who Visits Blackpool	Percentage
Couples	47%
Families	28%
Single adults	15%
Adult groups	11%

Type of Visit	Percentage
Staying trips	56%
Stay 5 nights or more	18%
Day trips	42%

Accommodation	Percentage
Hotel stays	66%
B&B / Guesthouses	19%
Found online	58%
Satisfaction with accommodation	87%

Spend	Percentage
Spending more than £300	36%

Where They Visit	Percentage
Promenade	81%
Houndshill Shopping Centre	38%
Trams	24%
Central Pier	23%
Beach	18%

Popular Attractions	Percentage
Blackpool Tower	23%
Illuminations	16%
Pleasure Beach	15%
Winter Gardens	11%
Sea Life Centre	10%

Why They Visit	Percentage
Holiday or leisure	74%
Familiar location	64%
Easy to get to	61%

What Visitors Like Most	Percentage
Attractions	20%
Seaside	16%
Promenade	14%
Atmosphere	12%
Variety	7%

What Could be Improved	Percentage
Nothing	34%
Refurbishments	10%
Parking	9%
Cheaper attractions	7%
Better weather	6%

5.4 The fourth set of tourism data that we use is the annual STEAM survey. This provides headline visitor numbers as well as economic impact. It differs from Omnibus in that it measures all visitors (including children). The same model is used by destinations throughout the UK including VisitEngland. The 2017 figures will be available in July this year.

Year	2016	2015	2014
Visitor Numbers (millions)	*18.03	17.05	16.82
Day Visitors (millions)	*14.56	13.69	13.42
Staying Visitors (millions)	3.47	3.36	3.40
Total Economic Impact (£bn)	*1.44	1.37	1.33

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