Visit Herts Business Barometer: July 2017

VISIT HERTS

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This report is a snapshot of attractions' performance in Hertfordshire, alongside serviced accommodation providers in the county. This month attractions in Hertfordshire experienced an increase in visitor footfall of **2.5%** compared to July 2016, although serviced accommodation providers experienced a slight decrease in occupancy levels of **1.2%** compared to the same time last year.

News

- Increased promotion and publicity and sold out events, were reported as positive factors that helped boost the visitor numbers of Hertfordshire attractions in July 2017.
- Visitors from 'other' countries including Estonia were cited as the most prevalent overseas market, by **50%** of attractions. Which was then followed by visitors from France, USA and Germany.
- The Visit Herts website experienced an increase in the number of sessions by **5%** compared to the previous month.

Visit Herts News

Visit Herts Website www.visitherts.co.uk

The average dwell time in July 2017 was **1.25 minutes**, with an average number of **2.42 pages** viewed during a session*.

**Sessions- Total number of Sessions within the date range. A session is the period time a user is actively engaged with the website.*

Visit Herts Marketing update

Digital

July 2017 was a particularly special month in terms of our website, as it was relaunched on a new platform. Throughout the month the website had 8,857 unique website visits and 20,469 total page views.

The Visit Herts social media channels once again performed well during July. On Twitter we ended the month with 1,062 followers, sent out 89 tweets throughout the month, and received 66,403 impressions during this period. On Facebook we ended the month with 353 followers/likes, posted 15 times throughout the month, and reached 2,571 people with our content. On Instagram we ended July with 295 followers and received 207 engagements within this period.

PR

Throughout July 2017 Visit Herts press coverage reached 71,548 people. During this month we sent out one press release, which focused on summer events and activities in Hertfordshire.

Some of our notable press coverage throughout July was the news that Visit Herts have now won the contract for the destination management of Hertfordshire for the next three to five years.

Travel Trade

In July the Visit Herts team began meeting with a number of partners to discuss the new travel trade strategy and how Visit Herts can assist with our investors' own groups strategy for 2017/2018.

The ongoing meetings have been an important part of developing and honing the strategy and ensuring it meets the needs of partners interested in the groups market.

Attractions

Hertfordshire visitor numbers in July

Visitor numbers	2016	2017	% change
	66,021	**67,650**	**Up 2.5%**

Visitor numbers for the year to date (YTD)

	2016	2017	% change for month	YTD Totals 2016	YTD Totals 2017	% change for YTD
May	**70,513**	**93,089**	**Up 32%**	**70,513**	**93,089**	**Up 32%**
June	**76,850**	**86,126**	**Up 12.1%**	**147,363**	**179,215**	**Up 21.6%**
July	**66,021**	**67,650**	**Up 2.5%**	**213,384**	**246,865**	**Up 15.7%**

NOTE: The figures above are the baseline for all calculations found on the next pages. The data reported here is strictly 'like for like, excluding figures for attractions that reported they were closed in the same month the previous year, or those attractions whose figures were not available. The figures in the table below includes figures from all attractions.

	2016	2017	% change for month	YTD Totals 2016	YTD Totals 2017	% change for YTD
May	**70,513**	**93,089**	**Up 32%**	**70,513**	**93,089**	**Up 32%**
June	**76,850**	**90,501**	**Up 17.8%**	**147,363**	**183,590**	**Up 22.6%**
July	**66,021**	**72,117**	**Up 9.2%**	**213,384**	**255,707**	**Up 19.8%**

Range of performance

66.7% of attractions that submitted monthly figures were up this month compared to July 2016, ranging from **4.6%** to **75%** up. Alongside this, **33.3%** of attractions reported a reduced footfall compared to July 2016, ranging from **-5.7%** to **-20%.**

Attractions up	Attractions down
66.7%	**33.3%**

Performance according to cost, % change July 16/17

Charging	Free
Down 0.4%	**Up 37.6%**

Performance according to attraction type, % change July 16/17

Museums/Art galleries	Other
Up 38.3%	**Down 4.2%**

Performance according to attraction location, % change July 16/17

Rural	Urban
Up 3.1%	**Down 6.9%**

Performance according to attraction size, % change July 16/17

20,000 or less	50,001 -200,000	Over 200,000
Down 3.3%	**Up 37%**	**Down 15.4%**

Factors affecting visitor attraction results

Positive factors
Increased promotion of events and publicity
Better weather conditions
Sold out events

Overseas visitors to attractions in July

During July, on average **92.5%** of visitors to attractions were domestic, **2.3%** long haul and **5.2%** European. Out of overseas visitors, **50%** of attractions reported visitors from 'other' countries such as; Estonia and Eastern European countries as being their most prevelant market. This was then followed by visitors from France, Germany and the USA (all reported by **17%** of attractions as being their most prevalent market).

Most prevalent overseas visitor groups in July 2017 (%)

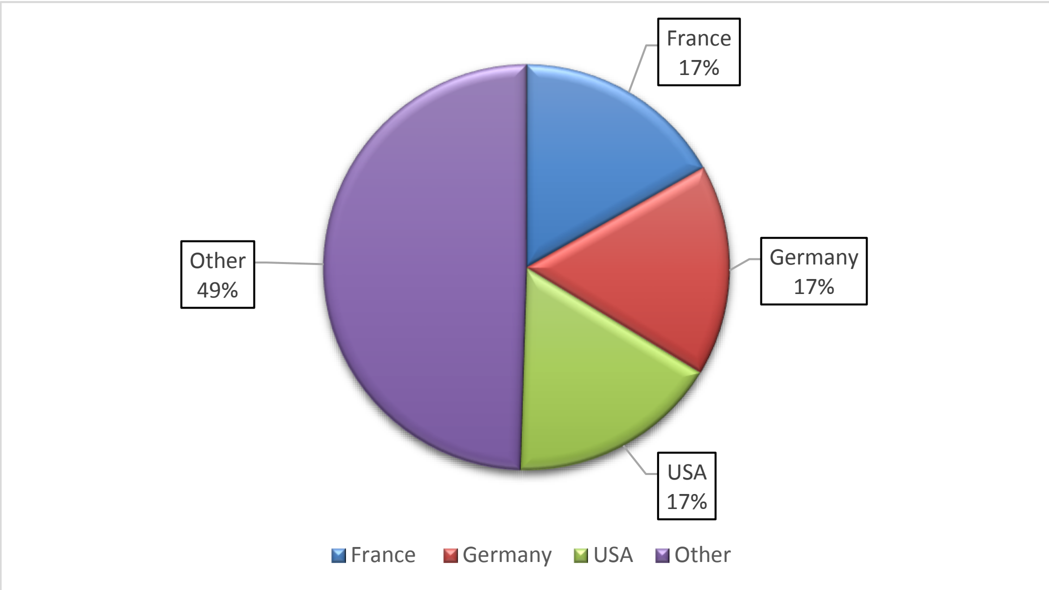

Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in July 2017

Serviced accommodation

According to the occupancy figures supplied by STR for **63** larger and chain hotels, as illustrated in figure 2 below, overall occupancy was **1.2%** down on the same month last year. On the other hand, the average daily rate increased by **4.7%** increase compared to July 2016 and revenue per available room experienced an increase of **3.5%.**

Figure 2: A map showing the locations of serviced accommodation providers that contribute monthly to the Hertfordshire Business Barometer through STR Global.

Year on year room occupancy comparison (%)

Hertfordshire	July 2016	July 2017	July 16/17
Occupancy	**83.8%**	**82.8%**	**Up 1.2%**

Year on year average daily rate comparison (%)

Hertfordshire	July 2016	July 2017	July 16/17
Occupancy	**69.3%**	**72.6%**	**Up 4.7%**

Year on year revenue per available room comparison (%)

Hertfordshire	July 2016	July 2017	July 16/17
Occupancy	**58%**	**60.1%**	**Up 3.5%**

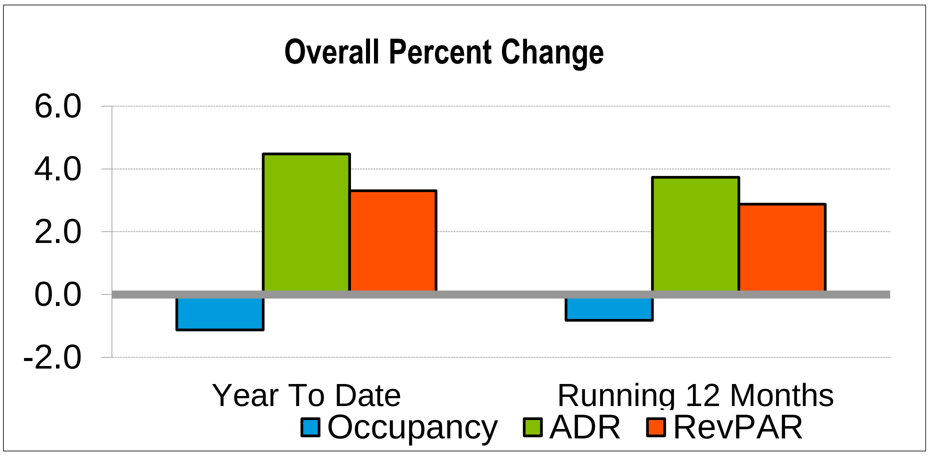

Figure 3: Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

This year … so far (%)

Hertfordshire	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	June 2017
Occupancy	-	-	-	-	-	**77.7%**
	July 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017
Occupancy	**82.8%**	-	-	-	-	-

Other News

VisitBritain Monthly inbound update July 2017

Visits

- The UK welcomed 4.0 million overseas visits in July, up 6% on July last year and setting a new July record. This was the first time, since records began, that the UK welcomed more than 4 million inbound visits in any one calendar month.
- Between May and July 2017 there were a record 11.1 million inbound visits to the UK, 4% up on the same period last year.
- The record setting continues over the first seven months of 2016 and the rolling 12 months to July 2017. There were 23.1 million visits to the UK in the first seven months of the year and 39.4 million visits in the 12 months to July 2017 – the best ever rolling 12 month period.

Spending

- July 2017 spending rose 3% compared to July 2016 to reach £2.8 billion (a new July record). With record setting results in six of the first seven months of the year (only June did not set a year on year monthly record), inbound visitors spent a record £13.3 billion in the first seven months of 2017, 9% more than the first part of 2016. Over the longer term rolling 12 months to July 2017 visitors to the UK spent a record £23.7 billion in the UK – the highest ever rolling 12 month period.
- For the last 12 months average spend per visit was £601, which is only slightly higher than the average for 2016 as spending growth has outpaced visit growth for most of 2017, with only the most recent months being an exception (June and July).

Journey purpose

- Holiday visits were up 12% to a July record of 1.8 million. This is the highest ever month of holiday visits to the UK. The record breaking continues over longer time periods as well. Between May and July 2017 there were 4.9 million holiday visits to the UK (11%

more than the same three month period last year). So far this year there have been a record 9.3 million holiday visits – 19% more than this time last year and the latest 12 month period (August 2016-July 2017) is the strongest ever 12 month period for inbound holiday visits.

- Visits to friends and relatives (VFR) were up 9% to a July record of 1.2 million this year. Following weaker May results, VFR visits in the last three months are down 2%, but are in positive record breaking territory for the first seven months of 2017 and rolling 12 months to July 2017.
- Business visits have been variable so far in 2017, posting negative results in July this year – down 2% compared to July 2016. With only January and May registering growth this year, there were 3% fewer business visits to the UK in the first seven months of 2017, compared to 2016. Due to a strong end of 2016, business results for the 12 months to July 2017 were just enough to match the previous rolling 12 month record posted last year (August 2015 – July 2016).
- Miscellaneous journey purpose visits are a combination of a wide range of different journey purposes, including (but not limited to) short term study, looking for work, shopping, attending a sports event and many more. In July 2017 visits to the UK were 13% down on July 2016 results. Visits were down 3% in the last three months of this year but with strong February and March 2017 results, miscellaneous visits were 7% up in the first seven months of 2017, compared to the same period last year (but not a record).

To view the full report click here

VisitEngland GB Day visits July 2017

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to July 2017 decreased by -9% when compared with the same period last year, to 447 million.
- The value of those visits remained stable during the same period at £15 billion.
- Year to date at the GB level, volume decreased by -3% to 1 billion but the value of visits increased by +3% to £34.6 billion.
- Looking at England, volume decreased by -11% in the three months to July 2017 at 376 million visits, while value decreased by -9% to £11.8 billion compared to the same period in 2016.
- Year to date the volume of day visits in England decreased relative to the same period in 2016 by -5%, to 853 million and the value decreased by -3% to £27.8 billion compared to the same period in 2016.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to July 2017 decreased by -8%, compared to the same period in 2016, to 744 million visits.
- The value of these visits increased by +1% for the three months against the same period last year to £22 billion.
- Year to date, volume is down by -5% to 1.7 billion 3+ hour visits but value increased by +1% to £48.7 billion.
- In England, volume declined by -10% in the three months to July 2017 to 623 million. Likewise, the value of these visits decreased, by -6%, to 17.6 billion.
- Year to date the volume of day visits in England decreased relative to the same period in 2016 by -6%, to 1.4 billion and the value decreased by -4% to £39.2 billion.

To view the full report click here

VisitEngland England Occupancy Survey July 2017

- Room occupancy in July remained unchanged at 84%, with bedspace occupancy decreasing 1% when compared to July 2016 at 60%.
- Seaside decreased by -2% to 87% for room occupancy and decreased -2% to 66% for bedspace occupancy.
- City/large town room occupancy remained unchanged at 84% whilst bedspace decreased 1% to 59%.
- Small town room occupancy decreased 1% to 82% and decreased by -1% to 60% for bedspace occupancy, with countryside occupancy remaining unchanged at 80% for room occupancy while bedspace occupancy decreased -1% to 55%.
- Looking at room and bedspace occupancy rates by number of rooms all categories remained relatively unchanged with changes of 2% or less.
- Looking at occupancy by region, the largest shift for room occupancy came from the East with a -2% decrease and from the West Midlands with a +2% increase. All other regions remained relatively unchanged with 2% or less change. For bedspace occupancy, the biggest shift came from the East with a -3% decrease. All other regions remained relatively unchanged with 2% or less change.

To view the full report click here

Business Barometer Contacts

If you would like to be part of the Business Barometer process, or if you have any questions please contact Ruby Berkeley-Cornner at ruby.berkeley-cornner@visitherts.co.uk

Acknowledgements

If you wish to use any information contained within this Barometer, please can you acknowledge the source as Visit Herts Business Barometer. Thank you.

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