

Visit Herts Business Barometer: August 2017



Visit Herts Business Barometer August 2017

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 **4.2%** compared to August 2016, although serviced accommodation providers experienced a slight decrease in occupancy levels of **3.7%** compared to the same time last year.

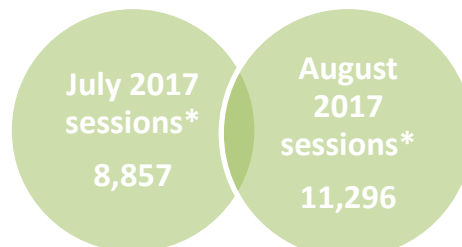
News

- Increased social media marketing and increased events were reported as positive factors that helped boost the visitor numbers of Hertfordshire attractions in August 2017.
- Visitors from 'other' countries including Poland were cited as the most prevalent overseas market, by **60%** of attractions, which was then followed by visitors from Germany and the USA.
- The Visit Herts website experienced an increase in the number of sessions by **32.6%** compared to the previous month.

Visit Herts News

Visit Herts Website www.visitherts.co.uk

The average dwell time in August 2017 was **1.41 minutes**, with an average number of **2.79 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.



In August 2017, Visit Herts optimised lots of additional digital activity as part of our summer Herts Brand Campaign. The website performed exceptionally well, and this heightened digital activity provided lots of learnings and targets to carry forward for the marketing team. Throughout the month the website had 11,296 unique website visits (an increase of 32.6% on the month previous), and 31,478 total page views (an increase of 53.7% on the month previous).

In August, the Visit Herts marketing team ran a number of additional, organic pieces of activity including two live Twitter chats, and one photo competition which ran for four weeks. The competition had 273 submitted images, and 365 votes on

In August we sent out three press releases – ‘Snap and share to win a five-star family break in Herts this summer’, ‘Go to Places launches Visit Herts Awards’ and ‘Nine nifty ways to get sporty in Dacorum this September’.

Our press coverage for August 2017 reached 193,669 people. We also hosted two press trips this month for international journalists as part of our Gardens & Gourmet campaign.



In August the Visit Herts Travel Trade team continued to meet with partners to discuss the new travel trade strategy and how Visit Herts can assist with our investors’ own groups strategy for 2017/2018. The team also met with UKinbound to discuss the new strategy and how Visit Herts can continue to work with UKinbound to further our relationships with inbound operators.



Attractions

Hertfordshire visitor numbers in August

Visitor numbers	2016	2017	% change
	90,510	94,274	Up 4.2%

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%
August	90,510	94,274	Up 4.2%	303,894	341,139	Up 12.3%

**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%
August	90,510	114,055	Up 26%	303,894	369,762	Up 21.7%

Range of performance

71.4% of attractions that submitted monthly figures were up this month compared to August 2016, ranging from **4.9%** to **86.1%** up. Alongside this, **28.6%** of attractions reported a reduced footfall compared to August 2016, ranging from **-0.8%** to **-12.5%**.

Attractions up	Attractions down
71.4%	28.6%

Performance according to cost, % change August 16/17

Charging	Free
Up 4.1%	Up 12.8%

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

Wildlife attractions/zoos	Other	Leisure/theme parks
Up 2.6%	Up 5.6%	Up 7.2%



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

Rural	Urban
Up 4.6%	Down 2.9%

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

20,000 or less	Visitors of 20,001 to 50,000	50,001 -200,000	Over 200,000
Up 10.7%	Up 51.1%	Up 4.9%	Down 0.8%

Factors affecting visitor attraction results

Positive factors

Increased social media marketing
Increase in the number of events

Overseas visitors to attractions in August

During August, on average **91.6%** of visitors to attractions were domestic, **3.4%** long haul and **5%** European. Out of the overseas visitors, **60%** of attractions reported visitors from 'other' countries such as; Poland and other Eastern European countries as being their most prevalent market. This was then followed by visitors from Germany and the USA (both reported by **20%** of attractions as being their most prevalent market).

Most prevalent overseas visitor groups in August 2017 (%)

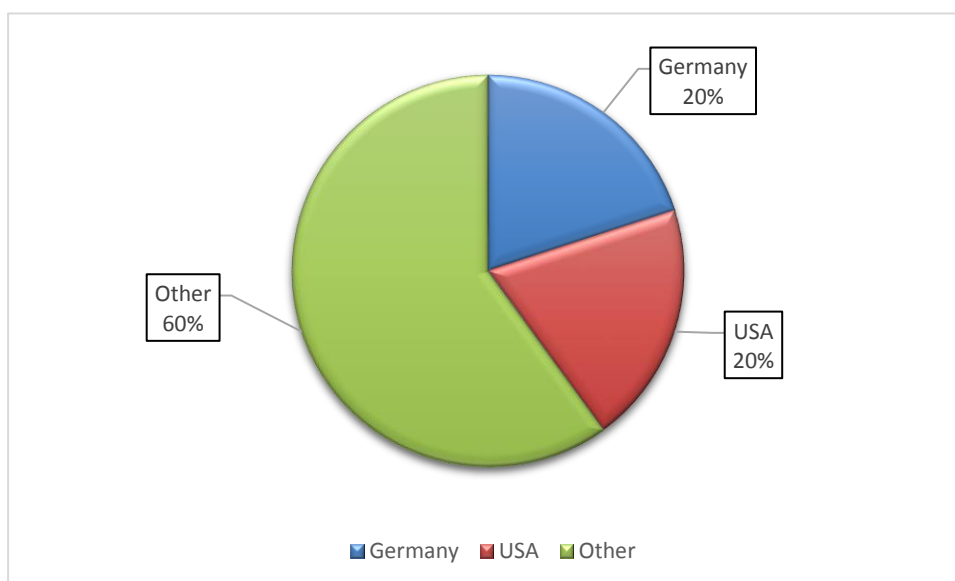


Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in August 2017



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 **3.7%** down on the same month last year. The average daily rate increased by **1%** compared to August 2016 and revenue per available room experienced a decrease of **2.8%**.

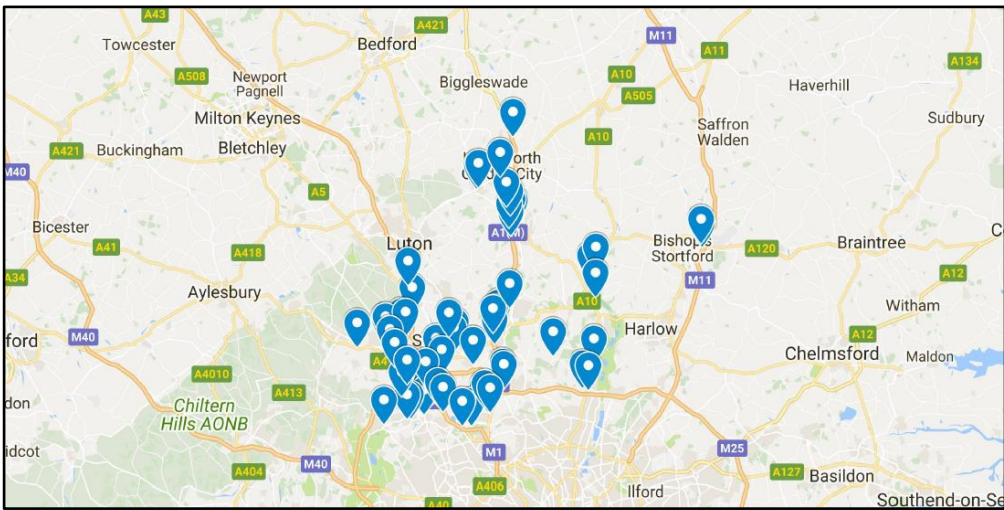


Figure 2: A map showing the locations of serviced accommodation providers that contribute monthly to the Hertfordshire Business Barometer through STR Global.

Year on year room occupancy comparison (%)

Hertfordshire	August 2016	August 2017	August 16/17
Occupancy	79%	76%	Down 3.7%

Year on year average daily rate comparison (%)

Hertfordshire	August 2016	August 2017	August 16/17
Occupancy	65%	65.7%	Up 1%



Year on year revenue per available room comparison (%)

Hertfordshire	August 2016	August 2017	August 16/17
Occupancy	51.4%	50%	Down 2.8%

Overall Percent Change

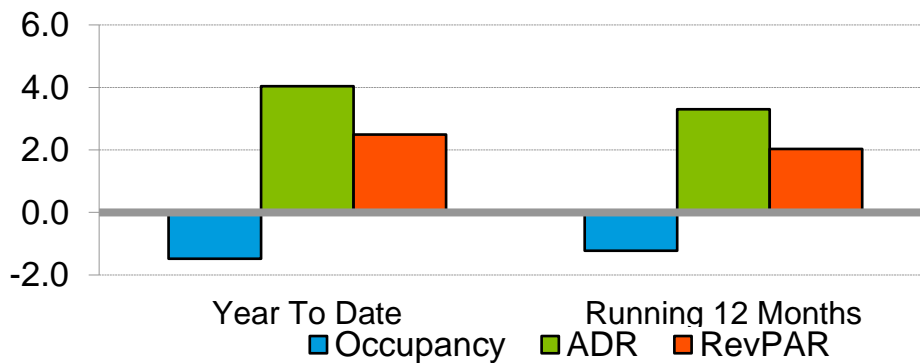


Figure 3: Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

This year ... so far (%)

Hertfordshire	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	June 2017
Occupancy	-	-	-	-	-	77.7%
Hertfordshire	July 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017
Occupancy	82.8%	76%	-	-	-	-

Other News

VisitBritain Monthly inbound update August 2017

Visits

- The UK welcomed 3.9 million overseas visits in August, up 5% on August last year and setting a new August record. Between June and August 2017 there were a record 11.5 million inbound visits to the UK, 6% up on the same period last year.




- The record setting continues over the first eight months of 2017 and the rolling 12 months to August 2017. There were 27.1 million visits to the UK in the first eight months of the year and 39.7 million visits in the 12 months to August 2017 – the best ever rolling 12 month period.

Spending

- August 2017 spending rose 3% compared to August 2016 to reach £2.8 billion (a new August record). With record setting results in all of the first eight months of the year, inbound visitors spent a record £16.4 billion, 10% more than the first eight months of 2016. Over the longer term rolling 12 months to August 2017 visitors to the UK spent a record £24.0 billion in the UK – the highest ever rolling 12 month period.
- Spend per visit: for the last 12 months average spend per visit was £606, which is slightly higher than the average for 2016 (£599). Spending growth outpaced visit growth for the first five months of 2017, but visits have grown faster than spending in the most recent three months (June, July and August).

Journey purpose

- Holiday visits were up 8% to an August 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 June and August 2017 there were 5.2 million holiday visits to the UK (13% more than the same three month period last year). So far this year there have been a record 11.1 million holiday visits – 17% more than this time last year – and the latest 12 month period (September 2016-August 2017) is the strongest ever 12 month period for inbound holiday visits.
- Visits to friends and relatives (VFR) were up 3% to an August record of 1.3 million this year and up to a record 3.4 million in the three months from June 2017. Following weaker results in February and May, VFR visits in the first eight months of 2017 have still reached record levels of 8 million – the first time there have been 8 million VFR visits in the first eight months of any calendar year.
- Business visits continue to be variable in 2017, posting negative results in August this year – down 1% compared to August 2016. With only January and May registering growth this year, there were 1% fewer business visits to the UK in the first eight months of 2017, compared to 2016. Due to a strong end of 2016, business results for the 12 months to August 2017 were just enough to be on par with the previous rolling 12 month record posted last year (September 2015 – August 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 August 2017 visits to the UK were 2% down on August 2016 results. Visits were down 4% in the last three months but with



double digit February and March 2017 results, miscellaneous visits were 6% up in the first eight 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 August 2017

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to August 2017 decreased by -3% when compared with the same period last year, to 502 million.
- The value of those visits decreased by -7% during the same period to £16.2 billion.
- Year to date at the GB level, volume decreased by -3% to 1.2 billion while the value of visits decreased by -1% to £40.4 billion.
- Looking at England, volume decreased by -5% in the three months to August 2017 at 415 million visits, while value decreased by -12% to £12.7 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 -4%, to 1 billion and the value decreased by -6% to £32.4 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 August 2017 decreased by -1% compared to the same period in 2016 to 811 million visits.
- The value of these visits decreased by -1% for the three months against the same period last year to £24.1 billion.
- Year to date, volume is down by -4% to 2 billion 3+ hour visits and value decreased by -1% to £57.3 billion.
- In England, volume declined by -3% in the three months to August 2017 to 671 million. Similarly, the value of these visits decreased, by -4%, to 19.2 billion.
- Year to date the volume of day visits in England decreased relative to the same period in 2016 by -5%, to 1.7 billion and the value decreased by -4% to £46.1 billion.

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-Corner 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.

