



Visit Herts Business Barometer: September 2017



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This report is a snapshot of attractions' and serviced accommodation providers' performance in Hertfordshire. This month, attractions in Hertfordshire experienced an increase in visitor footfall of **19.7%** compared to September 2016, although serviced accommodation providers experienced a slight decrease in occupancy levels of **3.7%** compared to the same time last year.

News

- Increased publicity and social media activity, alongside additional events compared to last year were reported as positive factors that helped boost the visitor numbers of Hertfordshire attractions in September 2017.
- On average **96.3%** of visitors to attractions were domestic and **3.7%** were overseas visitors. Out of the overseas visitors, countries including Italy were cited by **67%** of attractions, followed by **33%** of attractions reporting visitors from the USA.
- In September we saw a drop in the number of visitors to the Visit Herts website, possibly as a result of the seasonal change from summer to autumn, with fewer people looking for ideas for days out and short breaks as children returned to school, with the website experiencing a decrease in the number of sessions by **40.7%** compared to the previous month.

Visit Herts News

Visit Herts Website www.visitherts.co.uk

The average dwell time in September 2017 was **1.33 minutes**, with an average number of **2.3 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 September 2017, the Visit Herts website had 6,690 unique website visits and 15,414 total page views. Our summer photo competition, mentioned in last month's report, finished on 14th September. The winning image of Hertford County Hall was taken by Paul Drozd and received 96 votes in total.

The Visit Herts social media channels once again performed well during September. On Twitter we ended the month with 1,211 followers, sent out 142 tweets throughout the month, and received 86,464 impressions during this period. On Facebook we ended the month with 630 followers/likes, posted 26 times throughout the month, and reached 9,252 people with our content. On Instagram we ended September with 425 followers and received 725 engagements within this period.

In September we sent out three press releases – 'Five ways to fall for Herts this season', 'Voting Opens for the first Herts Tourism Awards' and 'Nine nifty ways to get sporty in Dacorum this September'. Our press coverage for September 2017 reached 72,592 people. We also sent out one consumer newsletter, titled 'Lights, camera, action! Behind the scenes of Herts.' This newsletter had an open-rate of 31.9% and click through rate of 4.6%.



September was a busy month for the travel trade team, as they met with several key investors to discuss their groups' offers as well as B2B key focuses for 2018 and beyond. The team met with St Albans District Council, Abodebed, The Cromwell Hotel, Natural History Museum Tring and the De Vere Theobald's Park Hotel. The Travel Trade manager also delivered a presentation on the benefits of working with the travel trade to all investors at the autumn networking event. Further activity took place on designing the brand new Hertfordshire group directory, as well as confirming a dedicated feature in Group Leisure magazine for 2018 for the county.



Attractions

Hertfordshire visitor numbers in September 2017

2016	2017	% change
43,239	51,771	Up 19.7%

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%
September	43,239	51,771	Up 19.7%	347,133	392,910	Up 13.2%

**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%
September	43,239	54,641	Up 26.4%	347,133	424,403	Up 22.3%

Range of performance

83.3% of attractions that submitted monthly figures were up this month compared to September 2016, ranging from 18.8% to 75.5% up.

Attractions up	Attractions down
83.3%	16.7%

Performance according to cost, % change September 16/17

Charging	Free
Up 19.9%	Up 18.8%

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

Other	Historic Houses/Castles and Heritage Centres
Up 17.7%	Up 35.6%



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

Rural	Urban
Up 18.4%	Up 64.3%

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

20,000 or less	50,001 -200,000	Over 200,000
Up 64.3%	Up 21.5%	Up 17.3%

Factors affecting visitor attraction results

Positive factors

Increased publicity and social media activity
Additional events compared to last year

Overseas visitors to attractions in September 2017

During September, on average **96.3%** of visitors to attractions were domestic, **1.7%** long haul and **2%** European. Out of the overseas visitors, **67%** of attractions reported visitors from 'other' countries such as; Italy and Eastern European countries as being their most prevalent markets. This was then followed by visitors from the USA, reported by **33%** of attractions.

Most prevalent overseas visitor groups in September 2017 (%)

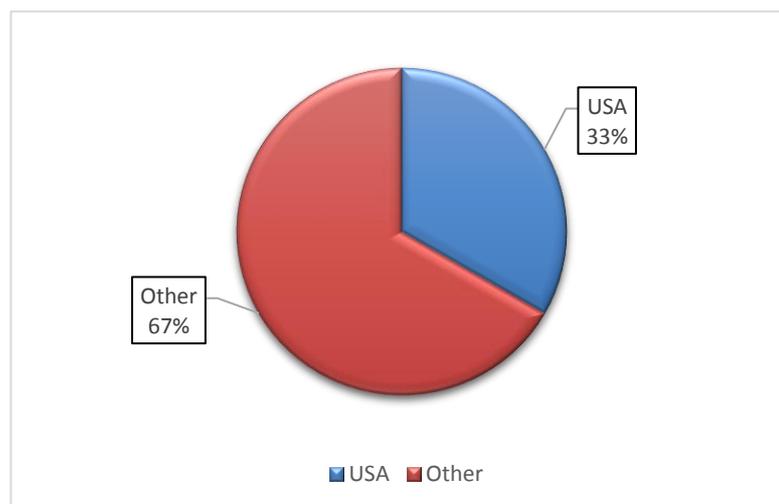


Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in September 2017



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 **1.6%** down on the same month last year. The average daily rate increased by **4.3%** compared to September 2016 and revenue per available room experienced an increase of **2.6%**.



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	September 2016	September 2017	September 16/17
Occupancy	82.3%	80.9%	Down 1.6%

Year on year average daily rate comparison (%)

Hertfordshire	September 2016	September 2017	September 16/17
Occupancy	70%	72.9%	Up 4.3%



Year on year revenue per available room comparison (%)

Hertfordshire	September 2016	September 2017	September 16/17
Occupancy	57.5%	59%	Up 2.6%

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%	80.9%	-	-	-

Other News

VisitBritain Monthly inbound update September 2017

Visits

- The UK welcomed 3.1 million overseas visits in September, down marginally by 1% compared to the record holding September 2016. Between July and September 2017 there were a record 11.0 million inbound visits to the UK, 4% up on the same period last year. The record setting continues over the first nine months of 2017 and the rolling 12



months to September 2017. There were 30.2 million visits to the UK in the first nine months of the year and 39.6 million visits in the 12 months to September 2017.

Spending

- September 2017 spending rose 2% compared to September 2016 to reach £2.3 billion (a new September record). With record setting results in all of the first nine months of the year, inbound visitors spent a record £18.7 billion, 9% more than the first nine months of 2016. Over the longer term rolling 12 months to September 2017 visitors to the UK spent a record £24.1 billion in the UK – the highest ever rolling 12 month period.
- Spend per visit: for the last 12 months average spend per visit was £607, which is slightly higher than the average for 2016 (£599). Spending growth has outpaced visit growth in six of the first nine months of 2017.

Journey purpose

- Holiday visits were up 2% to a September record of 1.2 million. The record breaking continues over longer time periods as well. Between July and September 2017 there were 4.8 million holiday visits to the UK (8% more than the same three month period last year). So far this year there have been a record 12.3 million holiday visits and the latest 12 month period (October 2016-September 2017) is the strongest ever 12 month period for inbound holiday visits.
- Visits to friends and relatives (VFR) were up 14% to a September record of 980,000. These positive results have contributed to VFR visits tracking 8% higher in the most recent three months compared to July to September 2016. Overall there have been 9 million VFR visits to the UK in the first nine months of 2017 – the first time the UK has welcomed 9 million VFR visits in the first nine months of any calendar year.
- Business visits continue to be weaker in 2017, compared to 2016. Business visits were down 18% in September this year, compared to September 2016. With only January and May registering growth this year, there were 3% fewer business visits to the UK in the first nine months of 2017, compared to 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 September 2017 visits to the UK were 3% down on September 2016 results. Visits were down 7% in the last three months but with double digit February and March 2017 results, miscellaneous visits were 5% up in the first nine 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 September 2017

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to September 2017 decreased by -3% when compared with the same period last year, to 500 million.
- The value of those visits decreased during the same period by -7% at £16.8 billion.
- Year to date at the GB level, volume decreased by -3% to 1.35 billion but the value of visits stayed the same at £46.2 billion.
- Looking at England, volume decreased by -4% in the three months to September 2017 at 414.5 million visits, while value decreased by -5% to £14 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 1.13 billion and the value decreased by -4% to £37.5 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 September 2017 decreased by -1% compared to the same period in 2016 to 806 million visits.
- The value of these visits increased by +1% for the three months against the same period last year to £24.5 billion.
- Year to date, volume is down by -4% to 2.2 billion 3+ hour visits and value remained the same at £65.2 billion.
- In England, volume declined by -2% in the three months to September 2017 to 670 million. However, the value of these visits increased, by +5%, to 20.5 billion.
- Year to date the volume of day visits in England decreased relative to the same period in 2016 by -5%, to 1.86 billion and the value decreased by - 3% to £53 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.

