



Visit Herts Business Barometer December 2017

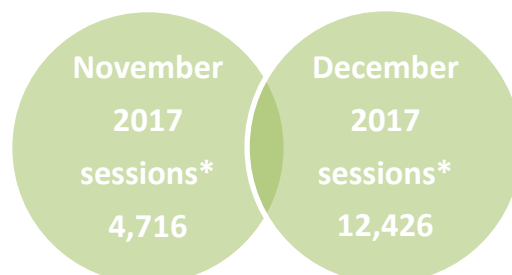
This report is a snapshot of attractions' and serviced accommodation providers' performance in Hertfordshire. This month, attractions in Hertfordshire experienced a decrease in visitor footfall of **2.3%** compared to December 2016, although findings do show that visitor footfall year to date saw an increase of **12.3%**. In addition to this, serviced accommodation providers reported a slight decrease in occupancy levels of **0.4%** compared to the same time last year.

News

- Poorer weather compared to 2016, in addition to less discounts and offers available were reported as factors that negatively impacted visitor numbers to Hertfordshire attractions in December 2017.
- On average **93.4%** of visitors to attractions were domestic and **6.6%** were overseas visitors. Out of the overseas visitors, visitors from France and the USA were both cited by **40%** of attractions as being their most prevalent market, followed by visitors from the Netherlands, cited by **20%** of attractions.
- **60%** of attractions that submitted monthly figures were up this month compared to December 2016.
- Serviced accommodation providers experienced an average occupancy of **69.3%** with average daily rate increasing by **1.6%** compared to December 2016 and revenue per available room experienced a marginal increase of **1.2%**.

Visit Herts Website www.visitherts.co.uk

The average dwell time in December 2017 was **1.07 minutes**, with an average number of **1.24 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.



Digital

In December 2017, the Visit Herts website had 10,056 unique website visits and 24,707 total page views. The Visit Herts social media channels once again performed well during December. On Twitter we ended the month with 1,401 followers and received 79,643 impressions during this period. On Facebook we ended the month with 906 followers/likes and reached 20,385 people with our content. On Instagram we ended December with 725 followers and received 830 engagements within this period.

During December, Visit Herts launched our first Christmas advent calendar competition, which ran for twelve days leading up to Christmas, with prizes donated from twelve businesses across the county. This competition was a huge success ending with 1,447 entries via our Facebook page.

In December, we sent out two press releases – ‘Win glorious gifts every day with the Visit Herts virtual advent calendar’ and ‘Visit Herts joins new ‘Connections’ project to attract more US visitors to the UK’. We also sent out two consumer newsletters, titled ‘A very Merry Christmas from Visit Herts!’ and ‘12 days of gifts from Hertfordshire launches tomorrow!’ These newsletters had open-rates of 32.7% and 28.1% and click through rates of 5% and 8.1%. In December 2017 we also hosted one press trip for a journalist from the Sunday Express Magazine.



PR



Travel Trade

December was a quieter month for the Visit Herts travel trade team, as we prepared for our first international show at Vakantiebeurs, NL in January 2018. December also saw us put the final touches to our brand new Group Travel Directory, seeing it published ready in time to distribute at all of the upcoming shows.



Attractions

Hertfordshire visitor numbers in December 2017

2016	2017	% change
18,808	18,368	Down 2.3%

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%
October	36,805	40,415	Up 9.8%	383,938	433,325	Up 12.9%
November	14,010	16,297	Up 16.3%	397,948	449,622	Up 13%
December	18,808	18,368	Down 2.3%	416,756	467,990	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%
September	43,239	54,641	Up 26.4%	347,133	424,403	Up 22.3%
October	36,805	40,760	Up 10.7%	383,938	465,163	Up 21.2%
November	14,010	16,581	Up 18.4%	397,948	481,744	Up 21%
December	18,808	18,368	Down 2.3%	416,756	500,112	Up 20%

Range of performance

60% of attractions that submitted monthly figures were up this month compared to December 2016, ranging from 15.6% to 150.1*% up.

Performance according to cost, % change December 16/17

Charging	Free
Down 16.1%	Up 16.8%

*Due to extra events taking place



**Performance according to attraction type, % change
December 16/17**

Museums/art galleries	Wildlife attractions/zoo
Up 16.8%	Down 21.7%

**Performance according to attraction location, % change
December 16/17**

Rural	Urban
Up 123.4%	Down 6%

**Performance according to attraction size, % change
December 16/17**

20,000 or less	50,001 -200,000	Over 200,000
Down 16.2%	Up 15.6%	Down 14%

Factors affecting visitor attraction results

Positive factors

Increase in the number of events hosted, compared to 2016
Increased community engagement

Overseas visitors to attractions in December 2017

During December, on average **93.4%** of visitors to attractions were domestic, **3%** long haul and **3.6%** European. Out of the overseas visitors, **40%** of attractions reported visitors from France as being their most prevalent market, alongside **40%** from the USA and **20%** of attractions reporting visitors from the Netherlands.

Most prevalent overseas visitor groups in December 2017 (%)

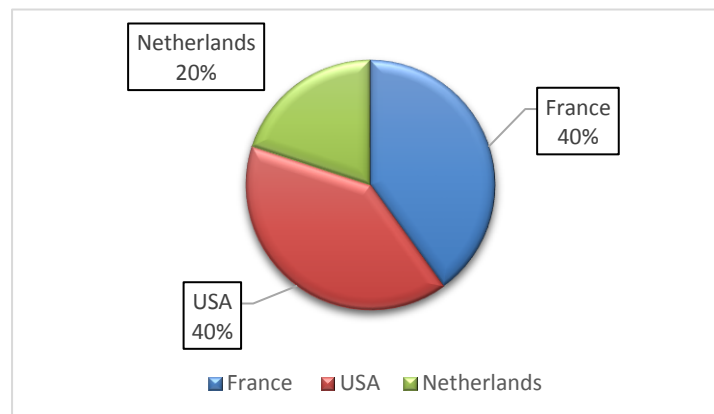


Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in December 2017



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 **0.4%** down on the same month last year. The average daily rate increased by **1.6%** compared to December 2016 and revenue per available room experienced an increase of **1.2%**.



Figure 2: 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	December 2016	December 2017	December 16/17
Occupancy	70%	69.7%	Down 0.4%

Year on year average daily rate comparison (%)

Hertfordshire	December 2016	December 2017	December 16/17
Occupancy	62.9%	64%	Up 1.6%

Year on year revenue per available room comparison (%)

Hertfordshire	December 2016	December 2017	December 16/17
Occupancy	44%	44.6%	Up 1.2%



Overall Percent Change

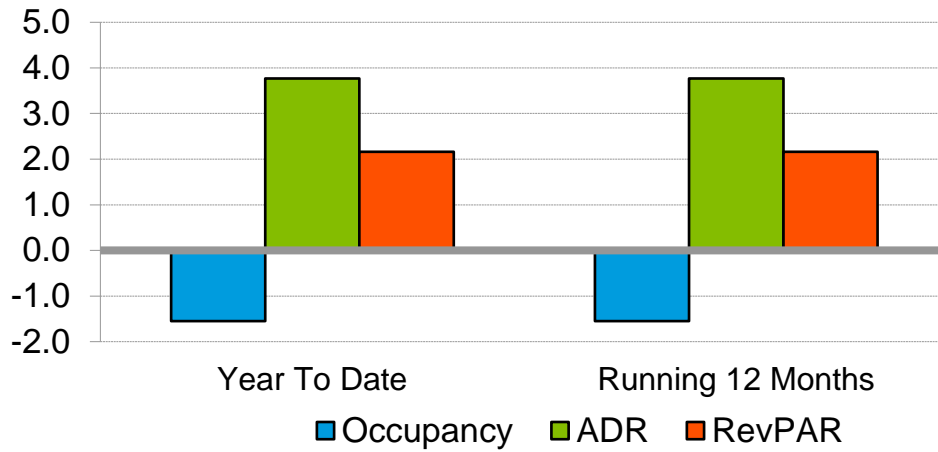


Figure 3: Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

This year ... so far (%)

Hertfordshire	Jan 2017	Feb 2017	Mar 2017	Apr 2017	May 2017	June 2017
Occupancy	-	-	-	-	-	77.7%
	July 2017	Aug 2017	Sep 2017	Oct 2017	Nov 2017	Dec 2017
Occupancy	82.8%	76%	80.9%	77.4%	75.3%	69.7%



Other News

VisitBritain Monthly inbound update December 2017

Visits

- The UK welcomed 3.2 million overseas visits in October, down by 6% compared to October 2016. Between August and October 2017 there were 10.1 million inbound visits to the UK, down marginally by 1% on the same period in 2016. However, overseas visits in both the first ten months of 2017 and the rolling 12 months to October 2017 set new records. There were 33.3 million visits to the UK in the first ten months of the year (up 5% on January – October 2016) and 39.3 million visits in the 12 months to October 2017 (up 7% on the 12 months to October 2016).

Spending

- Spending: October 2017 spending rose 1% compared to October 2016 to reach £1.9 billion. But with record results in each of the first nine months of the year, inbound visitors' spending still shows record results for the latest 3 and rolling 12 months to October 2017: international visitors spent £7.2 billion in August – October 2017 (up 6% on the same months in 2016).
- The record setting continues over the first ten months of 2017 with inbound spending up 10% on January – October 2016, to a record £20.9 billion, and over the past 12 months, with £24.5 billion spent between November 2016 and October 2017, the highest ever rolling 12-month period.
- Spend per visit: For the last 12 months average spend per visit was £622, which is above the average for 2016 (£599). Spending growth has outpaced visit growth in nine of the first ten months of 2017.

Journey purpose

- Holiday visits were down 5% to 1.1 million in October 2017, compared to holiday visits received in October 2016. Despite this decrease, holiday visits for the year to date, latest 3 months, and rolling 12 months to October 2017 all set new records. Between August and October 2017 there were 4.1 million holiday visits to the UK, up 2% on the same 3-month period in 2016. There were also a record 13.4 million holiday visits in the first ten months of 2017, and 15.4 million holiday visits in the latest 12-month period (November 2016 – October 2017), just below the strongest ever 12-month period for inbound holiday visits, achieved last month.
- Visits to friends and relatives (VFR) were down 2% to 1.0 million in October 2017. However, VFR visits are still tracking 4% higher in the most recent three months compared to 2016. Overall, there were 10.0 million VFR visits to the UK in the first ten months of 2017 – the highest first ten months of any calendar year. There were also 12.0 million VFR visits to the UK in the rolling 12 months to October 2017, almost on par with the strongest ever rolling 12 months for VFR.



- Business visits continue to be weaker in 2017, compared to 2016. Business visits in October 2017 were down 13% on October 2016. With only January and May registering growth in 2017, there were 4% fewer business visits to the UK in the first ten months of 2017, compared to the same months in 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 October 2017 visits to the UK for those miscellaneous purposes were up 8% on the same month a year ago. Visits in the last three months were just on par with those in August – October 2016. But, with double digit growth in February and March 2017, there were 5% more miscellaneous visits in the first ten months of 2017, compared to the same period in 2016 (although not a record).

To view the full report click [here](#)

VisitEngland GB Day visits December 2017

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to December 2017 decreased by -1% when compared with the same period last year, to 441 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 -2% to 1.8 billion, while the value of visits decreased by -2% to £62.4 billion.
- Looking at England, volume decreased by -1% in the three months to December 2017 at 372 million visits, while value decreased by -8% to £13.4 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 -3%, to 1.5 billion and the value decreased by -5% to £51 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 December 2017 decreased by -5% when compared to 2016, to 718 million visits.
- The value of these visits decreased by -14% for the three months against the same period last year to £22.8 billion.
- Year to date, volume is down by -4% to 2.9 billion 3+ hour visits and value decreased by -4% to £87.9 billion.



- In England, volume declined by -5% in the three months to December 2017 to 607 million. The value of these visits decreased by -16% to 19 billion.
- Year to date, the volume of day visits in England decreased relative to the same period in 2016 by -5%, to 2.5 billion and the value decreased by -7% to £72 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.

