

Visit Herts Business Barometer February 2018

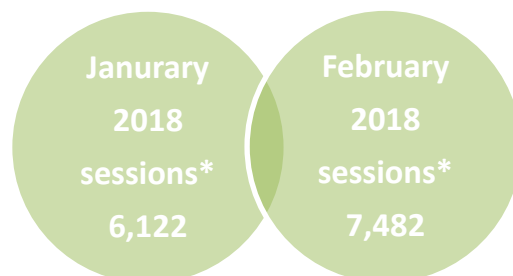
This report is a snapshot of attractions' and serviced accommodation providers' performance in Hertfordshire. This month, attractions in Hertfordshire experienced an increase in visitor footfall of **2.6%** compared to February 2017. In addition, serviced accommodation providers reported a marginal decrease in occupancy levels of **0.2%** compared to the same time last year.

News

- An increase in brand awareness and marketing and events was reported as positively impacting visitor footfall to Hertfordshire attractions in February 2018.
- On average **94.5%** of visitors to attractions were domestic, **2.5%** long haul and **3%** European. Out of the overseas visitors, attractions reported visitors from France alongside visitors from the USA. their most prevelant market.
- **71.4%** of attractions that submitted monthly figures were up this month compared to February 2017.
- Serviced accommodation providers experienced an average occupancy of **71.8%** with average daily rate increasing by **2%** compared to February 2017 and revenue per available room experienced a marginal increase of **1.8%**.

Visit Herts Website www.visitherts.co.uk

The average dwell time in February 2018 was **1.39 minutes**, with an average number of **1.14 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 February 2018 the Visit Herts website had **7,482** unique website visits and 18,855 total page views.
- The Visit Herts social media channels once again performed well during February. On Twitter we ended the month with 1,523 followers and received **67,300** impressions during this period. On Facebook we ended the month with 1,005 followers/likes and reached **66,658** people with our content. On Instagram we ended February with **1,008** followers and received 987 engagements within this period.

- In February our PR coverage reached **201,185** people.
- In this month we sent out two press releases – one to announce the launch of Herts Big Weekend and one to announce a local Hertfordshire pub landlord (and one of the Visit Herts partners) was a finalist in Visit England's Tourism Superstar Awards.



- In February, the trade team attended the annual UKinbound Conference to meet 1:1 with operators bringing international visitors into the UK.
- Hertfordshire was relatively unknown and there was interest to find out more about the county, with exclusive and luxury breaks becoming a trend for smaller groups.
- The team also attended the annual Coach Tourism Conference in Blackpool, meeting with UK coach companies to encourage day trips and short breaks into the county.
- The importance of group-friendly accommodation continues to be key for coach operators in choosing destinations.



Attractions

Hertfordshire visitor numbers in February 2018

2017	2018	% change
37,824	38,797	Up 2.6%

Visitor numbers for the year to date (YTD)

	2017	2018	% change for month	YTD Totals 2017	YTD Totals 2018	% change for YTD
January	24,139	26,057	Up 7.9%	24,139	26,057	Up 7.9%
February	37,824	38,797	Up 2.6%	61,963	64,854	Up 4.6%

**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.*

	2017	2018	% change for month	YTD Totals 2017	YTD Totals 2018	% change for YTD
January	24,139	26,057	Up 7.9%	24,139	26,057	Up 7.9%
February	37,824	38,797	Up 2.6%	61,963	64,854	Up 4.6%



Range of performance

71.4% of attractions that submitted monthly figures were up this month compared to February 2017, ranging from **16.2%** to **110%** up.

Performance according to cost, % change February 17/18

Charging	Free
Down 9.6%	Up 17.8%

Performance according to attraction location, % change February 17/18

Rural	Urban
Up 1.3%	Up 47.7%

Performance according to attraction size, % change February 17/18

20,000 or less	50,001 - 200,000	Over 200,000
Down 25.5%	Up 16.7%	Down 3%

Factors affecting visitor attraction results

Positive factors

Increased brand awareness and marketing
An increased focus on events and community engagement

Overseas visitors to attractions in February 2018

During February, on average **94.5%** of visitors to attractions were domestic, **2.5%** long haul and **3%** European. Out of the overseas visitors, **40%** of attractions reported visitors from France as being their most prevalent market, alongside **40%** from the USA.

Most prevalent overseas visitor groups in February 2018 (%)

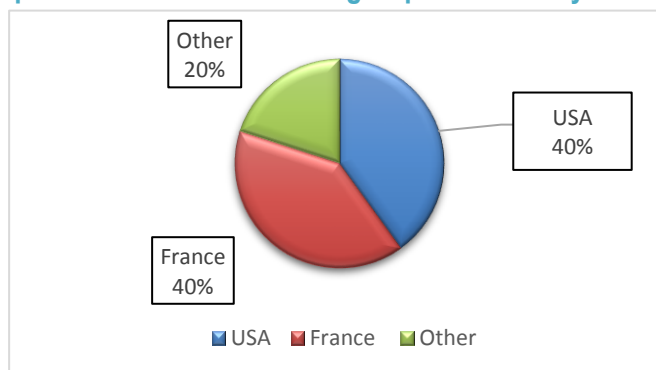


Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in February 2018



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 **0.2%** down on the same month last year. The average daily rate increased by **2%** compared to February 2017 and revenue per available room experienced an increase of **1.8%**.



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	February 2017	February 2018	February 17/18
Occupancy	72%	71.8%	Down 0.2%

Year on year average daily rate comparison (%)

Hertfordshire	February 2017	February 2018	February 17/18
Occupancy	66.3%	67.1%	Up 2%

Year on year revenue per available room comparison (%)

Hertfordshire	February 2017	February 2018	February 17/18
Occupancy	47.7%	48.6%	Up 1.8%

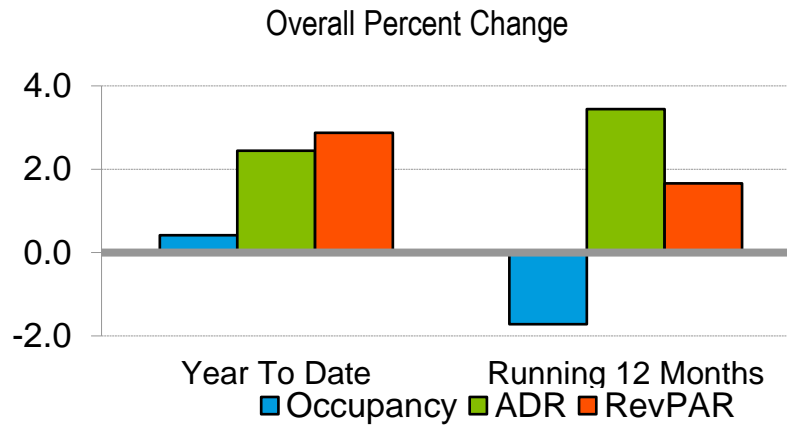


Figure 3: Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

This year ... so far (%)

Hertfordshire	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	June 2018
Occupancy	64.5%	71.8%	-	-	-	-
	July 2018	Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018
Occupancy	-	-	-	-	-	-

Other News

VisitEngland Occupancy Survey February 2018

- Room occupancy in February has remained unchanged at 74%, whilst bedspace occupancy also remained unchanged when compared to February 2017 at 52%. The change in room occupancy was led by an increase in room supply of 1.5% compared to a decrease of -0.7% in demand compared to the same month in 2017.
- Revenue per available room, which is the total room revenue divided by the total number of available rooms, increased by 1% in January at £63.89 compared to the previous year.
- City/large town room occupancy decreased 1% to 74% whilst bedspace remained the same at 52%. Seaside increased by +2% to 70% for room occupancy and increased by +2% to 53% for bedspace occupancy.
- Small town room occupancy increased +1% to 68% and remained unchanged for bedspace occupancy at 49%, with countryside occupancy decreasing -1% for room occupancy to 63% while bedspace occupancy decreased -1% to 43%.



- Looking at room occupancy rates by establishment size all categories remained relatively unchanged with changes of 1% or less except for 26-50 rooms which decreased by 2% to 68%. For bedspace, all categories remained relatively unchanged with changes of 1% or less.
- Looking at occupancy by region, the largest shift for room occupancy came from Yorkshire & Humberside with a -3% decrease. All other regions remained relatively unchanged with a 1% or less change. For bedspace occupancy, only Yorkshire & Humberside declined by -3% whereas all other regions remained relatively unchanged with 1% 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-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.

