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Hertfordshire Business Barometer

March 2018

Contents

Key Findings

- Attractions experienced a decrease in visitor footfall of **-1.7%** during March 2018**,** with **40%** of attractions reporting a weaker performance.
- The main factor cited to have negatively impacted influenced attractions' performance was the poor weather experienced in March 2018.
- The occupancy levels of serviced accommodation providers were on par compared to March 2017, while RevPAR aw an increase of **+1.9%** compared to March 2017.
- **92%** of visitors to attractions were domestic and **8%** overseas. Out of the overseas visitors, **29%** of attractions reported guests from France as being the most prevalent market, in addition to **29%** also citing visitors from the USA.
- In March 2018, the Visit Herts website performed better, with an **+11.6%** increase in the number of sessions compared to the previous month.

Comparison March 2017/18

	Attraction visitor numbers	1.7%	↓
Serviced	Serviced accommodation- all serviced accommodation occupancy- source: STR Global Ltd	0.1%	↑

Visit Herts Marketing Update

Digital

In March, the Visit Herts website had **8,352** unique website visits and **24,344** total page views. The Visit Herts social media channels continued to perform well during March. On Facebook we ended the month with **1,059** followers/likes, posted 31 times throughout the month, and reached **51,038** people with our content. On Instagram we ended March with **1,056** followers and received **938** engagements within this period. On Twitter we ended the month with **1,622** followers, sent out **118** tweets throughout the month, and received **124,529** impressions during this period.

PR

In March, we sent out two press releases – 'Mum's the word – Mother's Day events in Hertfordshire' and 'Nearly 33,000 bids for tickets in the 3rd Herts Big Weekend'. In March Visit Herts welcomed travel blogger Wanderlust Chloe to St Albans with VisitEngland as part of English Tourism Week.

Travel Trade

In March, Visit Herts attended ExploreGB in Newcastle. ExploreGB is VisitBritain's flagship event providing Great British & Irish tourism suppliers and destinations with an invaluable opportunity to meet and do business with up to 300 hosted international travel buyers from 35+ countries. Over this two-day workshop, Visit Herts had one-to-one appointments with key tour operators showcasing the county.

Website

9,557 sessions
1.42 average dwell time
2.55 pages viewed per session

Social Media

1,622 followers
1,059 followers
1,056 followers

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Visitor Attractions

Visitor Attractions

Visitor numbers March 2018/2017

2017	2018	% change
68,424	67,281	Down 1.7%

Range of performance

60% of Hertfordshire attractions were up this month, ranging from **+10.9%** up to **+125%** up, with **40%** of attractions also reporting a reduced footfall, ranging from **-11.6%** down to **-47.8%** down.

Attractions up	Attractions down
60%	40%

Performance according to cost March 2018/2017

Charging	Free
Down 17.5%	Up 6.3%

Performance according to attraction size March 2018/2017

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
Down 15.6%	Down 11.6%	Up 15.4%	Up 6.1%

Performance according to attraction location March 2018/2017

Urban	Rural
Down 9%	Up 4.8%

Visitor numbers for the year to date (YTD)

Month	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%
March	68,424	67,281	Down 1.7%	130,387	132,135	Up 1.3%
April	-	-	-	-	-	-
May	-	-	-	-	-	-
June	-	-	-	-	-	-
July	-	-	-	-	-	-
August	-	-	-	-	-	-
September	-	-	-	-	-	-
October	-	-	-	-	-	-
November	-	-	-	-	-	-
December	-	-	-	-	-	-
March*	68,424	67,501	Down 1.3%	130,387	132,355	Up 1.5%

**Please note: The figures in the blue part of the table above are the baseline for all calculations found within this section. The data reported here is strictly 'like for like', excluding figures for attractions that reported they were closed this month or the same month the previous year, or those attractions that have recently begun contributing and cannot provide figures for the previous year. The figures in the grey row include figures from all attractions.*

Factors affecting visitor attractions

Positive

Positive impact of additional promotions held and word of mouth.

Positive impact of additional elements added to attractions.

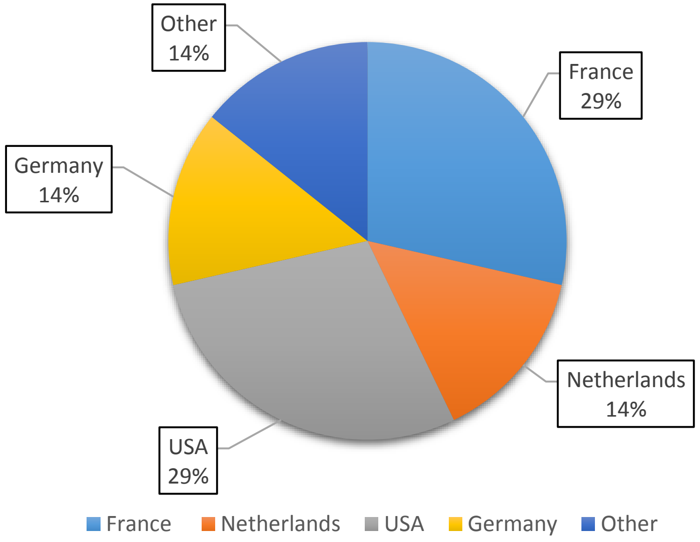
Negative

Impact of poor weather conditions.

Reduced footfall due to changes of third party ticket sales.

Origin of visitors to attractions

- During March 2018, **92%** of visitors to attractions were domestic, **2%** long haul and **5%** European.
- Out of the overseas visitors, **29%** of attractions reported guests from both France and the USA as being their most prevalent market.



Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in March 2018

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Hertfordshire Accommodation

Serviced Accommodation

- According to STR Global figures for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **71.7%,** slightly below figures seen at national level.
- However, Hertfordshire accommodation providers saw figures on par with those seen in March 2017, while nationally occupancy was also on par.
- In Hertfordshire revenue per available room was up **+1.9%,** while nationally RevPAR saw a **+1%** increase.
- In addition in Hertfordshire, average daily rate was up **+1.8%** compared to March 2017.

Year on year room occupancy comparison (%)

Hertfordshire	March 2017	March 2018	March 17/18
Occupancy	71.6%	71.7%	Up 0.1%

This year … so far (%)

Hertfordshire	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	June 2018
Occupancy	64.5%	71.8%	71.7%	-	-	-
	July 2018	Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018
Occupancy	-	-	-	-	-	-

Map showing the locations of serviced accommodation providers that contribute monthly to the Hertfordshire Business Barometer through STR Global.

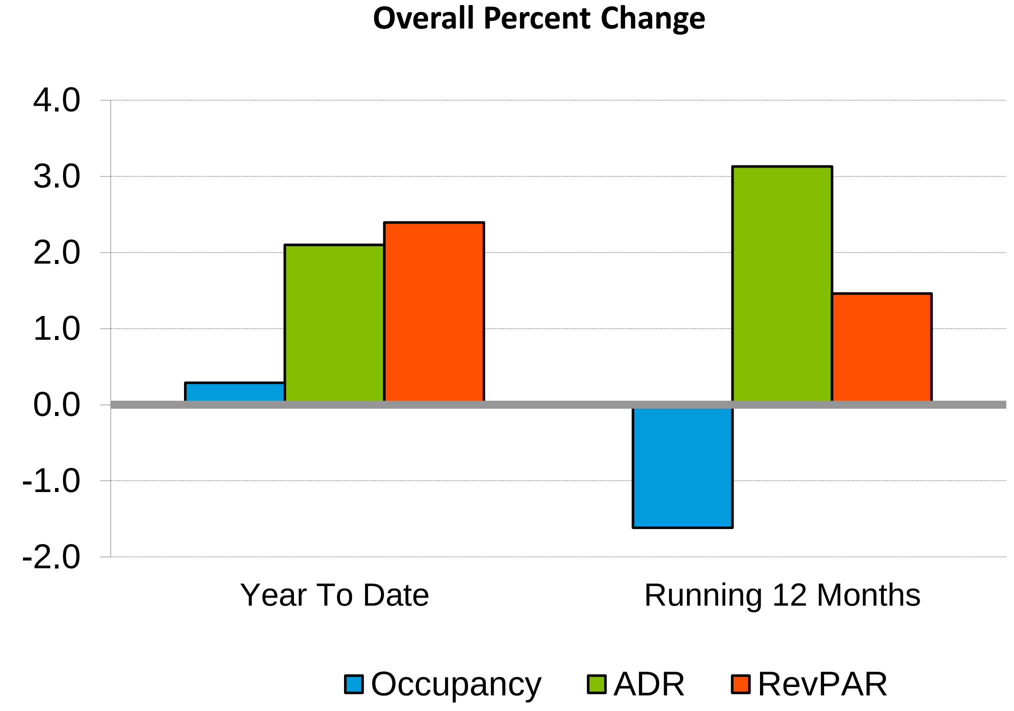
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	March 2017	March 2018	March 17/18
Occupancy	£67.23	£68.43	Up 1.8%

Year on year revenue per available room comparison (%)

Hertfordshire	March 2017	March 2018	March 17/18
Occupancy	£48.16	£49.06	Up 1.9%



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

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Other News

Other News

VisitEngland Occupancy Survey: March 2018 results

Summary of Results

- Room occupancy in March has remained unchanged at 75%, whilst bedspace occupancy decreased by -1% when compared to March 2017 at 53%. The change in room occupancy was led by an increase in room supply of 1.6% compared to an increase of 1.9% in demand compared to the same month in 2017.
- RevPAR, which is the total room revenue divided by the total number of available rooms, increased by 1% in March at £67.96 compared to the previous year.
- City/large town room occupancy was unchanged at 76% whilst bedspace occupancy decreased by -1% to 54%. Seaside was unchanged at 69% for room occupancy and 52% for bedspace occupancy.
- Small town room occupancy increased +1% to 69% and decreased by -1% for bedspace occupancy to 50%, with countryside decreasing -1% for room occupancy to 65% while bedspace occupancy decreased -1% to 45%. Looking at room occupancy rates by establishment size most categories remained relatively unchanged except for 1-25 rooms which decreased by -4% to 68%.
- For bedspace, 1-25 room establishments decreased by -4% to 50%, whilst other 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. The other notable shifts were Northwest England and Southwest England increasing by +2%. For bedspace occupancy, Yorkshire & Humberside declined by -3% and Greater London declined by -2%, whereas all other regions remained relatively unchanged with 1% or less change.

To view the full report click here

VisitEngland GB Day visits 2018: March 2018 GB & England

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to March 2018 decreased by -5% when compared with the same period last year, to 380 million.
- The value of those visits increased by +1% during the same period to £13.9 billion.
- Year to date at the GB level, shows the same figures as three months figures, due to this month being the 3rd month of the year.
- Looking at England, volume decreased by -5% in the three months to March 2018 to 321 million visits, while value increased by +2% to £11.3 billion compared to the same period in 2017.
- Year to date at the England level, shows the same figures as three months figures, due to this month being the 3rd month of the year.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to March 2018 decreased by -6% when compared to 2017, to 642 million visits.
- The value of these visits increased by +14% for the three months against the same period last year to £21.4 billion.
- Year to date at the GB level, shows the same figures as three months figures, due to this month being the 3rd month of the year.
- In England, volume declined by -6% in the three months to March 2018 to 538 million. However, the value of these visits increased by +18% to 17.9 billion.
- Year to date at the England level, shows the same figures as three months figures, due to this month being the 3rd month of the year.

To view the full report click here

Glossary

VICs- Visitor Information Centres

CTR- Click through rate

AVE- Advertising Value Equivalent

GTOs- Group Travel Organisers

DMOs- Destination Management Organisations

OP- On par

ADR- Average Daily rate

RevPAR- Revenue per available room

YTD- Year to date

Business Barometer Contacts

If you would like to be part of the Business Barometer, or have any questions on its content, please contact

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Previous reports

To view our previous Business Barometer reports and other research resources please visit- www.visitherts.co.uk

Acknowledgements

If you wish to use any figures or information contained within this report, please acknowledge the source as Visit Herts Business Barometer, March 2018. Thank you.