Visit Herts Business Barometer: June 2017

VISIT HERTS

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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 **12.1%** compared to June 2016, although serviced accommodation providers experienced a slight decrease in occupancy levels of **3.9%** compared to the same time last year.

News

- Increased engagement with school groups, increased promotion and publicity and good weather, were reported as positive factors that helped boost visitor numbers in June 2017 to Hertfordshire attractions.
- Visitors from 'other' countries including, Canada and New Zealand were cited as the most prevalent overseas market, by **49%** of attractions. Which was then followed by visitors from France, USA and China (all reported by **17%** of attractions as being their most prevalent market).
- The Visit Herts website experienced an increase in the number of sessions by **11.4%** compared to the previous month.

Visit Herts News

Visit Herts Website www.visitherts.co.uk

The average dwell time in June 2017 was **2.08 minutes**, with an average number of **2.89 pages** viewed during a session*.

June 2017 sessions*

8,438

**Sessions- Total number of Sessions within the date range. A session is the period time a user is actively engaged with the website.*

Visit Herts Marketing update

Digital

The website visits to www.visitherts.co.uk in June again saw a positive rise. Throughout the month the website had 8,438 unique website visits (an 11.4% increase on the month previous), and 24,357 total page views (another increase of 4.5%). On par with May, around 80% of visits to the website in June were new visitors. In June the Visit Herts marketing team was working very heavily on our brand new website relaunch (launched at the beginning of July). The Visit Herts social media channels once again performed well during June. Our Facebook content reached 2,085 people throughout the month, the Visit Herts Twitter had 57.2K impressions over this 30 day period. We ended June with 1,001 followers on this channel, which is great milestone to have passed! We posted a number of times on Instagram throughout the month, and have now reached 278 followers on this channel (a rise of 28 followers in June alone).

PR

In May we sent out one press release – 'PR011 - Fabulous Food & Fantastic Festivals - what's coming up in Hertfordshire' which was a roundup of summer events and activities taking place across Herts throughout the summer season. Our press coverage for June 2017 reached 12, 326 people. Some of our generated coverage that was picked up in June 2017 was news of our Hertfordshire Tourism Awards launch.

Travel Trade

In June the Visit Herts Travel Trade team attended UKinbound's USA seminar, a chance to hear the latest stats and insights into the North American market. The team also began meeting with a number of partners interested in the groups market to discuss the brand new Visit Herts travel trade strategy and how we can work with them to target the groups market.

Attractions

Hertfordshire visitor numbers in June

Visitor numbers	2016	2017	% change
	76,850	**86,126**	**Up 12.1%**

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%**

**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%**

Range of performance

All attractions that submitted monthly figures were up this month compared to June 2016, ranging from **6.4%** to **133.3%** up.

Attractions up	Attractions down
100%	**n/a**

Performance according to cost, % change June 16/17

Charging	Free
Up 11.7%	**Up 42.5%**

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

Visitor/Heritage centres	Museums/Art galleries	Other
Up 60.6%	**Up 42.5%**	**Up 6.4%**

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

Rural	Urban
Up 11.1%	**Up 27%**

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

20,000 or less	50,001 -200,000	Over 200,000
Up 30.2%	**Up 6.4%**	**Up 17.3%**

Factors affecting visitor attraction results

Positive factors
Additional engagement with school groups
Better weather
Increased promotion and publicity

Overseas visitors to attractions in June

During June, on average **94.4%** of visitors to attractions were domestic, **2.4%** long haul and **3.1%** European. Out of overseas visitors, **49%** of attractions reported visitors from 'other' countries including, Canada and New Zealand as being their most prevelant market. This was then followed by visitors from France, USA and China (all reported by **17%** of attractions as being their most prevalent market).

Most prevalent overseas visitor groups in June 2017 (%)

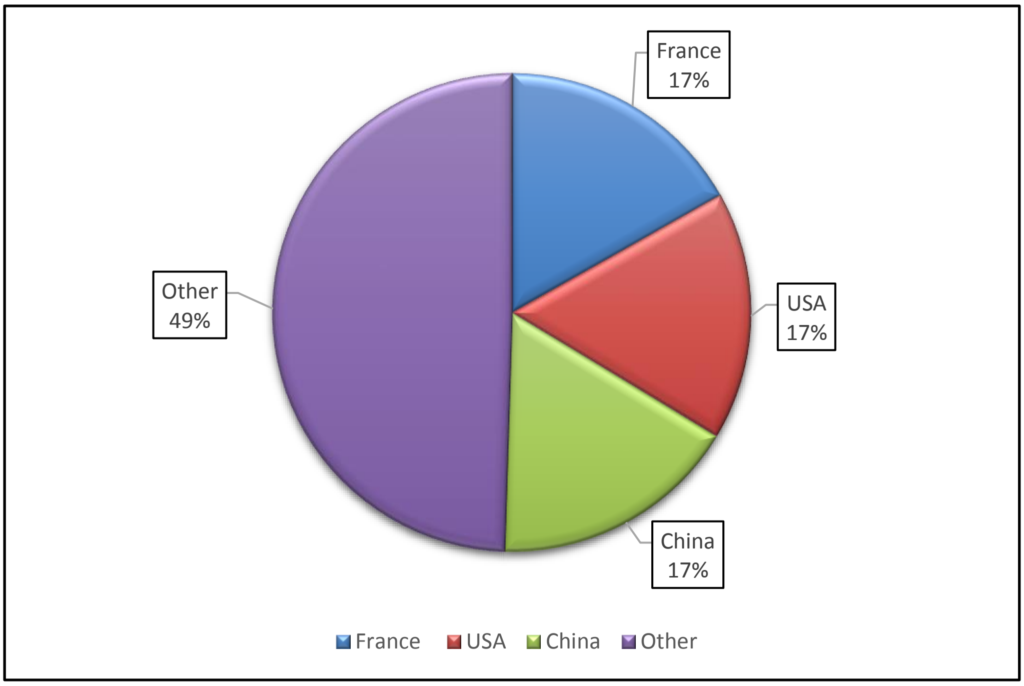

Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in June 2017

Serviced accommodation

According to occupancy figures supplied by STR for **62** larger and chain hotels, as illustrated in figure 2 below, overall occupancy was **3.9%** down on the same month last year. In addition, average daily rate experienced a **4.1%** increase compared to June 2016 and revenue per available room was on par with figures from last year.

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	June 2016	June 2017	June 16/17
Occupancy	**80.9%**	**77.7%**	**Down 3.9%**

Year on year average daily rate comparison (%)

Hertfordshire	June 2016	June 2017	June 16/17
Occupancy	**71.7%**	**74.6%**	**Up 4.1%**

Year on year revenue per available room comparison (%)

Hertfordshire	June 2016	June 2017	June 16/17
Occupancy	**58%**	**58%**	**On par**

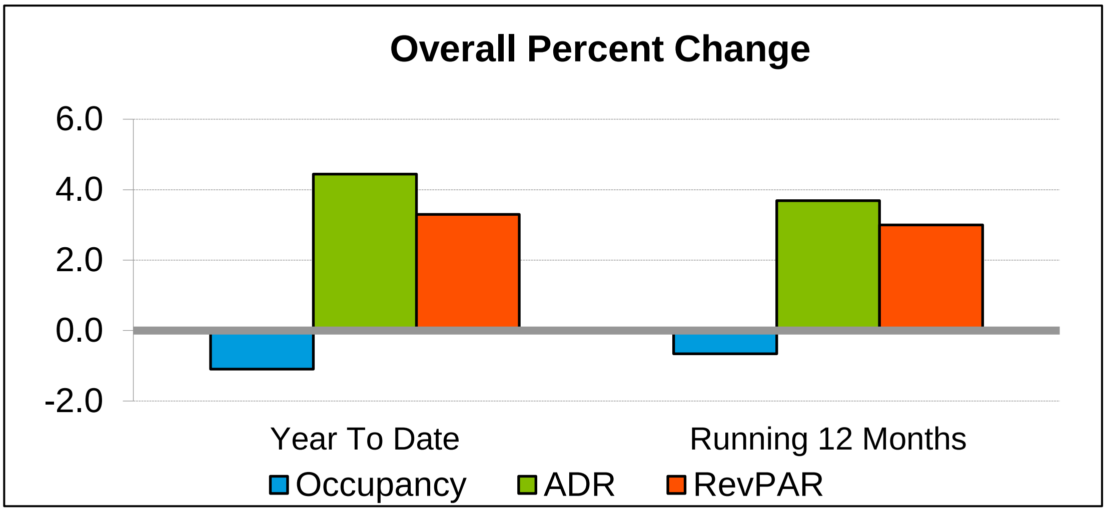

Figure 3: Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

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	-	-	-	-	-	-

Other News

VisitBritain Monthly inbound update June 2017

Visits

- The UK received 3.5 million overseas visits in June, up 7% on June last year and setting a new June record.
- Between April and June 2017 there were 10.8 million inbound visits to the UK, 8% up on the same period last year. With results available until June, we can now see that the first half of 2017 was a record setting period with the UK welcoming 19.1 million visits, 9% more than in 2016.
- Over the longer term, 12 months to June 2017, there were 39.1 million visits to the UK – the best ever rolling 12 month period.

Spending

- June spending rose 2% compared to June 2016 to reach £2.2 billion (not quite enough to set a new June record). However, with record setting results in each of the first five months of the year, inbound visitors have spent a record £10.6 billion in the first half of 2017, 11% more than the first half of 2016 and the first time inbound visitor spending has topped £10 billion in the first six months of any year.
- Combining this spending with spend during the last half of 2016, visitors have spent a record £24 billion in the UK – the highest ever 12 month period.
- On average, for the last 12 months, spend per visit was £603 - which has been rising gradually since the beginning of 2017 as spending growth has outpaced visit growth.

Journey purpose

- Holiday visits were up 21% to a June record of 1.6 million. Building on strong growth earlier this year there were a record 7.5 million holiday visits in the first half of 2017, up 20% on the start of 2016 and the first time more than 7 million holiday visits have arrived in the UK before the start of July. Over the longer term rolling 12 months to June 2017, the UK welcomed 15.2 million holiday visits – a record and 12% higher than the previous 12 month period.

- Visits to friends and relatives (VFR) were up 2% to a June record of 890,000 this year. In the first six months of 2017, VFR visits have set new monthly year on year records in four individual months. Added together the UK has welcomed a record 5.5 million VFR visits in the first half of the year – 4% more than in the first half of 2016.

- Business visits have been variable so far in 2017, posting negative results in June this year – down 7% compared to the record June 2016. With only January and May registering growth, there were 3% fewer business visits to the UK in the first half of 2017, compared to the start of 2016. Due to a strong end of 2016, business results for the 12 months to June 2017 were just enough to match the previous record of 9.1 million (July 2015 – June 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 June 2017 visits to the UK were 6% higher than the previous year at a record 270,000. With new monthly records set in four out of the last six months, visits were up 13% in the first half of 2017, but not quite setting a new record.

To view the full report click here

VisitEngland GB Day visits June 2017

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to June 2017 decreased by -2% when compared with the same period last year, to 453 million.
- The value of those visits increased by +9% during the same period to £15.7 billion.
- Year to date at the GB level volume decreased by -2% to 852 million and value of visits increased by +4% to £29.4 billion.
- Looking at England, volume decreased by -4% in the three months to June 2017 at 381 million visits, while value also decreased by -1% to £12.4 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 -4%, to 719 million and the value decreased by - 3% compared to the same period in 2016 to £23.5 billion.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to June 2017 decreased by -7% compared to the same period in 2016 to 738 million visits.
- The value of these visits increased by +4% for the three months against the same period last year to £21.9 billion.
- Year to date, volume is down by -6% to 1.4 billion 3+ hour visits and value decreased by -1% to £40.7 billion.
- In England, volume declined by -7% in the three months to June 2017 to 620 million. The value of these visits also decreased, by -3%, to 17.3 billion.
- Year to date the volume of day visits in England decreased relative to the same period in 2016 by -7%, to 1,2 billion and the value decreased by -7% to £32.5 billion.

To view the full report click here

VisitEngland England Occupancy Survey June 2017

- Room occupancy in June decreased by 1% to 81%, with bedspace occupancy remaining unchanged when compared to June 2016 at 56%.
- Seaside decreased by -1% to 82% for room occupancy and remained unchanged at 58% for bedspace occupancy.
- City/large towns room and bedspace occupancy remained unchanged at 81% and 56% respectively.

- Small town room occupancy increased 1% to 78% and increased by +1% to 53% for bedspace occupancy, with countryside occupancy down by -1% for room to 82% while bedspace occupancy remaining unchanged at 60%.
- Looking at room occupancy rates by number of rooms, there were decreases by -1% and 2%. For bedspace occupancy, only the 1-25 rooms (-1%) saw a decrease.
- All other categories remained unchanged. Looking at occupancy by region, the largest shift for room occupancy came from the North West with a -4% decrease all other regions remained relatively unchanged with 2% or less change.
- For bedspace occupancy, all regions varied by 2% or less.

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-Cornner 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.

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