



## Visit Herts Business Barometer: October 2017



### Visit Herts Business Barometer October 2017

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 **9.8%** compared to October 2016, although serviced accommodation providers experienced a slight decrease in occupancy levels of **1.9%** compared to the same time last year.

#### News

- Increased marketing and word of mouth, alongside additional group visits compared to last year were reported as positive factors that helped boost the visitor numbers of Hertfordshire attractions in October 2017.
- On average **97.3%** of visitors to attractions were domestic and **2.7%** were overseas visitors. Out of the overseas visitors, visitors from France were cited by **50%** of attractions, followed by visitors from the USA and the Netherlands, both reported by **25%** of attractions.
- In October we saw a slight drop in the number of visitors to the Visit Herts website (**9.5%**), compared to the previous month.

#### Visit Herts News

#### Visit Herts Website [www.visitherts.co.uk](http://www.visitherts.co.uk)

The average dwell time in October 2017 was **1.40 minutes**, with an average number of **2.56 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.



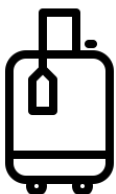
### Digital

In October 2017, the Visit Herts website had 6,057 unique website visits and 15,528 total page views. The Visit Herts social media channels once again performed well during October. On Twitter we ended the month with 1,290 followers, sent out 129 tweets throughout the month, and received 51,796 impressions during this period. On Facebook we ended the month with 675 followers/likes, posted 28 times throughout the month, and reached 5,969 people with our content. On Instagram we ended October with 478 followers and received 828 engagements within this period.

In October, we sent out one press release – ‘Devilish delights in Dacorum’. Our press coverage for October 2017 reached 72,592 people. In September 2017 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%.



### PR



### Travel Trade

In October, Visit Herts attended the Group Leisure and Travel Show (12<sup>th</sup>) at the Birmingham NEC. This is a popular show with domestic GTOs and it is well-known within the domestic groups industry. Many GTOs were already familiar with Hertfordshire, and were positive towards Dacorum and St Albans. We were able to present our guide to Herts which included recommendations of visits alongside all that the county can offer for visiting groups. We were also delighted to collect more contacts for our travel trade newsletter. The team were also able to meet with several out-of-county coach companies this month, to introduce Hertfordshire as an attractive destination for a day trip or short break. Time was also spent this month preparing for Visit Herts attendance at World Travel Market (to be held in November).



## Attractions

### Hertfordshire visitor numbers in October 2017

2016	2017	% change
<b>36,805</b>	<b>40,415</b>	<b>Up 9.8%</b>

### Visitor numbers for the year to date (YTD)

	2016	2017	% change for month	YTD Totals 2016	YTD Totals 2017	% change for YTD
<b>May</b>	<b>70,513</b>	<b>93,089</b>	<b>Up 32%</b>	<b>70,513</b>	<b>93,089</b>	<b>Up 32%</b>
<b>June</b>	<b>76,850</b>	<b>86,126</b>	<b>Up 12.1%</b>	<b>147,363</b>	<b>179,215</b>	<b>Up 21.6%</b>
<b>July</b>	<b>66,021</b>	<b>67,650</b>	<b>Up 2.5%</b>	<b>213,384</b>	<b>246,865</b>	<b>Up 15.7%</b>
<b>August</b>	<b>90,510</b>	<b>94,274</b>	<b>Up 4.2%</b>	<b>303,894</b>	<b>341,139</b>	<b>Up 12.3%</b>
<b>September</b>	<b>43,239</b>	<b>51,771</b>	<b>Up 19.7%</b>	<b>347,133</b>	<b>392,910</b>	<b>Up 13.2%</b>
<b>October</b>	<b>36,805</b>	<b>40,415</b>	<b>Up 9.8%</b>	<b>383,938</b>	<b>433,325</b>	<b>Up 12.9%</b>

*\*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
<b>May</b>	<b>70,513</b>	<b>93,089</b>	<b>Up 32%</b>	<b>70,513</b>	<b>93,089</b>	<b>Up 32%</b>
<b>June</b>	<b>76,850</b>	<b>90,501</b>	<b>Up 17.8%</b>	<b>147,363</b>	<b>183,590</b>	<b>Up 22.6%</b>
<b>July</b>	<b>66,021</b>	<b>72,117</b>	<b>Up 9.2%</b>	<b>213,384</b>	<b>255,707</b>	<b>Up 19.8%</b>
<b>August</b>	<b>90,510</b>	<b>114,055</b>	<b>Up 26%</b>	<b>303,894</b>	<b>369,762</b>	<b>Up 21.7%</b>
<b>September</b>	<b>43,239</b>	<b>54,641</b>	<b>Up 26.4%</b>	<b>347,133</b>	<b>424,403</b>	<b>Up 22.3%</b>
<b>October</b>	<b>36,805</b>	<b>40,760</b>	<b>Up 10.7%</b>	<b>383,938</b>	<b>465,163</b>	<b>Up 21.2%</b>

### Range of performance

**85.7%** of attractions that submitted monthly figures were up this month compared to October 2016, ranging from **6.7%** to **112%** up.

Attractions up	Attractions down
<b>85.7%</b>	<b>14.3%</b>

### Performance according to cost, % change October 16/17

Charging	Free
<b>Up 10.9%</b>	<b>Up 7.5%</b>

### Performance according to attraction type, % change October 16/17

Other	Wildlife attractions/zoos	Museums/art galleries
<b>Up 18.5%</b>	<b>Up 9.2%</b>	<b>Up 7.5%</b>



### Performance according to attraction location, % change October 16/17

Rural	Urban
Up 8.5%	Up 25%

### Performance according to attraction size, % change October 16/17

20,000 or less	50,001 -200,000	Over 200,000
Up 25.3%	Up 7.6%	Up 7.2%

### Factors affecting visitor attraction results

#### Positive factors

Increased marketing and word of mouth
Increase in the number of group visits compared to October 2016

### Overseas visitors to attractions in October 2017

During October, on average **97.3%** of visitors to attractions were domestic, **1%** long haul and **1.7%** European. Out of the overseas visitors, **50%** of attractions reported visitors from France as being their most prevalent market, followed by visitors from the USA and the Netherlands, both reported by **25%** of attractions.

### Most prevalent overseas visitor groups in October 2017 (%)

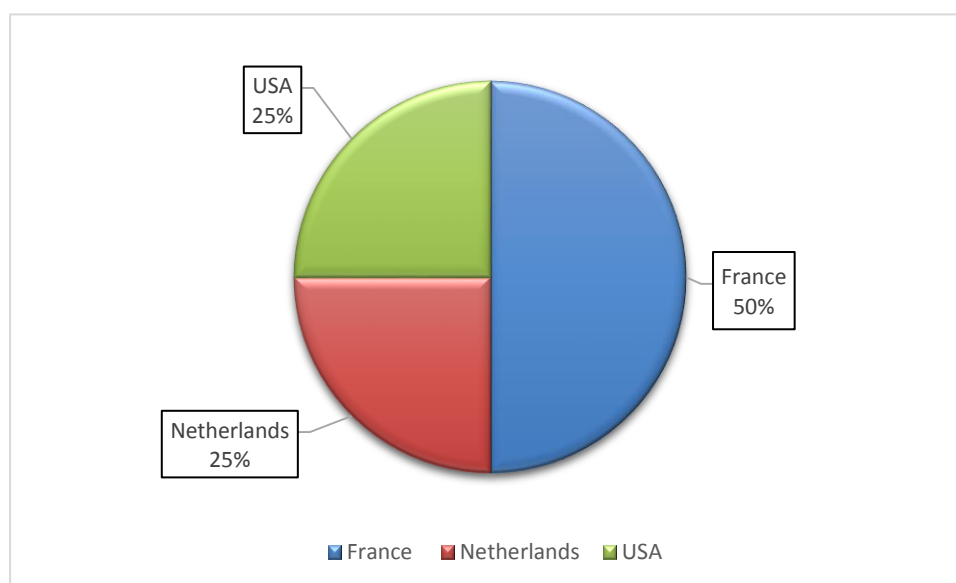


Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in October 2017



## 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 **1.9%** down on the same month last year. The average daily rate increased by **4.1%** compared to October 2016 and revenue per available room experienced an increase of **2.2%**.

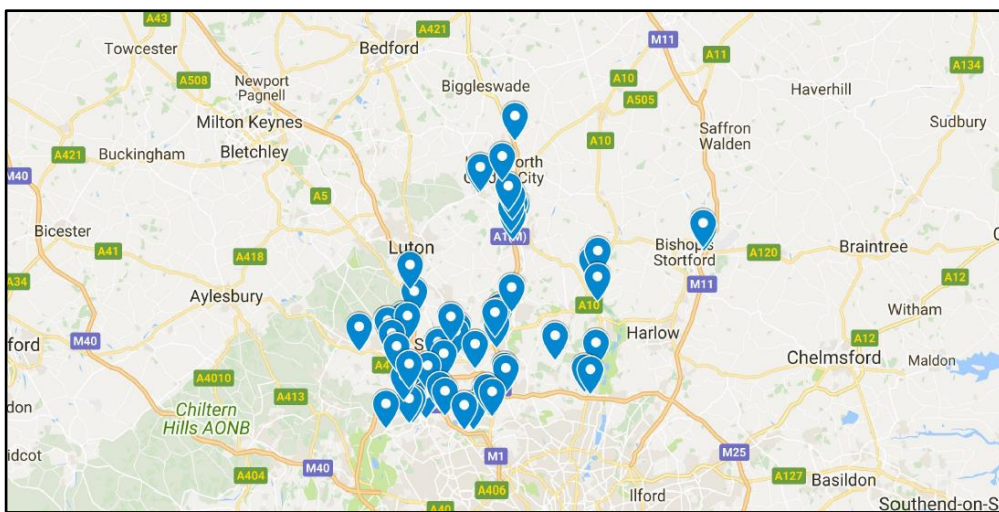


Figure 2: A map showing the locations of serviced accommodation providers that contribute monthly to the Hertfordshire Business Barometer through STR Global.

### Year on year room occupancy comparison (%)

Hertfordshire	October 2016	October 2017	October 16/17
Occupancy	78.8%	77.4%	<b>Down 1.9%</b>

### Year on year average daily rate comparison (%)

Hertfordshire	October 2016	October 2017	October 16/17
Occupancy	68.7%	71.6%	<b>Up 4.1%</b>





### Year on year revenue per available room comparison (%)

Hertfordshire	October 2016	October 2017	October 16/17
Occupancy	54.2%	55.4%	Up 2.2%

### Overall Percent Change

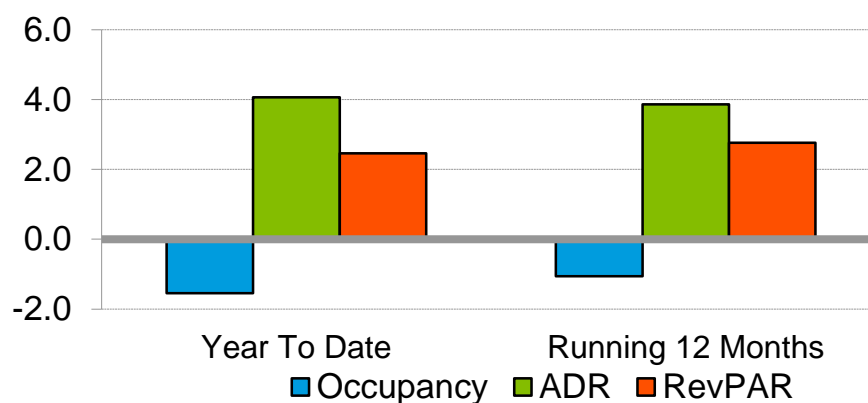


Figure 3: Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

### 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%	-	-



## Other News

### VisitBritain Monthly inbound update October 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

- 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 October 2017

### Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to October 2017 stayed the same when compared with the same period last year at 492 million.
- The value of those visits decreased by -10% during the same period at £16.2 billion.
- Year to date at the GB level, volume decreased by -2% to 1.5 billion and the value of visits decreased by -1% to £50.8 billion.
- Looking at England, volume decreased by -2% in the three months to October 2017 at 408 million visits, while value decreased by -8% to £13.5 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 1.3 billion and the value decreased by -4% to £41.3 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 October 2017 decreased by -2% compared to the same period in 2016 to 782 million visits.
- The value of these visits decreased by -7% for the three months against the same period last year to £22.8 billion.
- Year to date, volume in GB is down by -4% to 2.5 billion 3+ hour visits and value decreased by -2% to £71.5 billion.



- In England, volume declined by -3% in the three months to October 2017 to 653 million. Similarly, the value of these visits decreased, by -5%, to £19.1 billion.
- Year to date the volume of day visits in England decreased relative to the same period in 2016 by -5%, to 2.1 billion and the value decreased by - 4% to £58.3 billion.

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

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### 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-corner@visitherts.co.uk](mailto:ruby.berkeley-corner@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.

