



Visit Herts Business Barometer: November 2017



Visit Herts Business Barometer November 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 **16.3%** compared to November 2016, although serviced accommodation providers experienced a slight decrease in occupancy levels of **2.6%** compared to the same time last year.

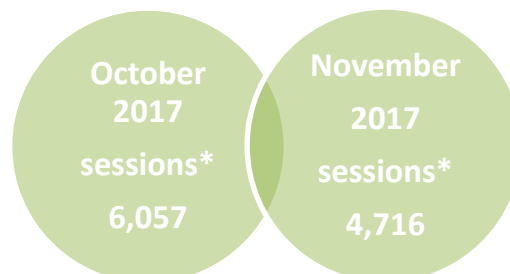
News

- Increased marketing and promotion, compared to last year were reported as positive factors that helped boost visitor numbers to Hertfordshire attractions in November 2017.
- On average **97%** of visitors to attractions were domestic and **3%** were overseas visitors. Out of the overseas visitors, visitors from France were cited by **66.7%** of attractions as being their most prevalent market, followed by visitors from the USA, cited by **33.3%** of attractions.

Visit Herts News

Visit Herts Website www.visitherts.co.uk

The average dwell time in November 2017 was **2.01 minutes**, with an average number of **2.72 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.



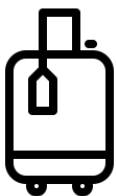
Digital

In November 2017, the Visit Herts website had 4,716 unique website visits and 12,825 total page views. The Visit Herts social media channels once again performed well during November 2017. On Twitter we ended the month with 1,352 followers, sent out 105 tweets throughout the month, and received 75,597 impressions during this period. On Facebook we ended the month with 683 followers/likes, posted 25 times throughout the month, and reached 5,567 people with our content. On Instagram we ended November with 572 followers and received 673 engagements within this period.

In November we sent out one press release – ‘Go To Places Herts Tourism Award Winners Announced’. In November 2017 we also sent out one consumer newsletter, titled ‘6 ways to make this Christmas a cracker in Herts!’ This newsletter had an open-rate of 35.5% and click through rate of 5.3%. In November 2017, we also hosted one press trip for Canadian blogger Ryan Wood.



PR



Travel Trade

The travel trade team were delighted to attend World Travel Market this month, where the county had a strong presence on the UKinbound stand. We were able to speak to lots of B2B operators and contacts, sharing the stand for 3 days with Hatfield House. Work also continued this month to plan the brand new group travel guide, with listings for partners and members, along with a new map being designed for the county. We also sent out a dedicated travel trade newsletter to our trade database, which received a 33% open rate and featured St Albans, Natural History Museum Tring, into Watford and Lawn House.



Attractions

Hertfordshire visitor numbers in November 2017

2016	2017	% change
14,010	16,297	Up 16.3%

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%

**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%

Range of performance

100% of attractions that submitted monthly figures were up this month compared to November 2016, ranging from **6.9%** to **37.6%** up.

Performance according to cost, % change November 16/17

Charging	Free
Up 28.9%	Up 6.9%

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

Other	Wildlife attractions/zoos
Up 10%	Up 27.4%



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

Rural	Urban
Up 14.9%	Up 37.6%

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

20,000 or less	50,001 -200,000	Over 200,000
Up 33.9%	Up 6.9%	Up 26.3%

Factors affecting visitor attraction results

Positive factors

Increased marketing and promotional efforts, compared to the same period last year

Overseas visitors to attractions in November 2017

During November, on average **97%** of visitors to attractions were domestic, **1.2%** long haul and **1.8%** European. Out of the overseas visitors, **66.7%** of attractions reported visitors from France as being their most prevalent market, followed by visitors from the USA, reported by **33.3%** of attractions.

Most prevalent overseas visitor groups in November 2017 (%)

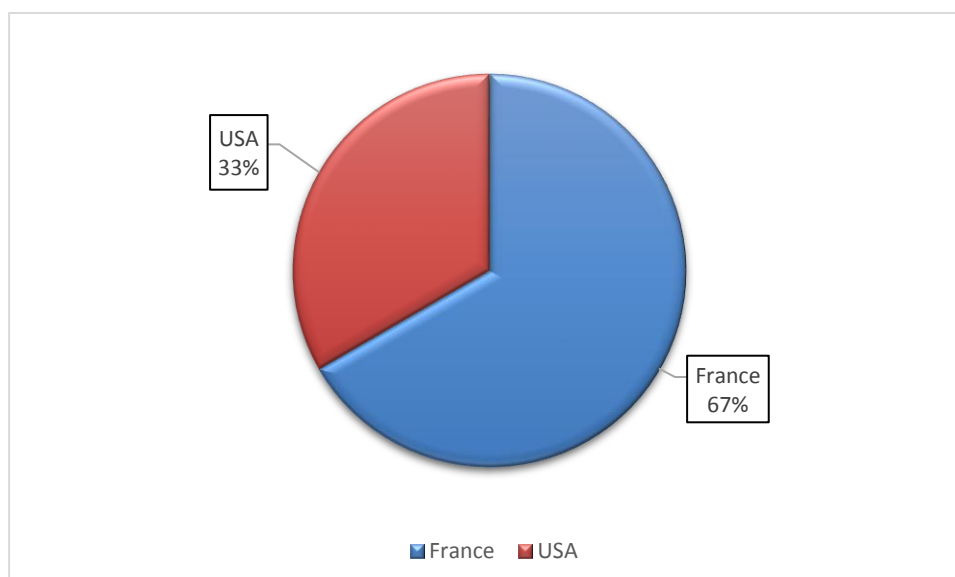


Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in November 2017



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 **2.6%** down on the same month last year. The average daily rate increased by **3%** compared to November 2016 and revenue per available room experienced a marginal increase of **0.2%**.

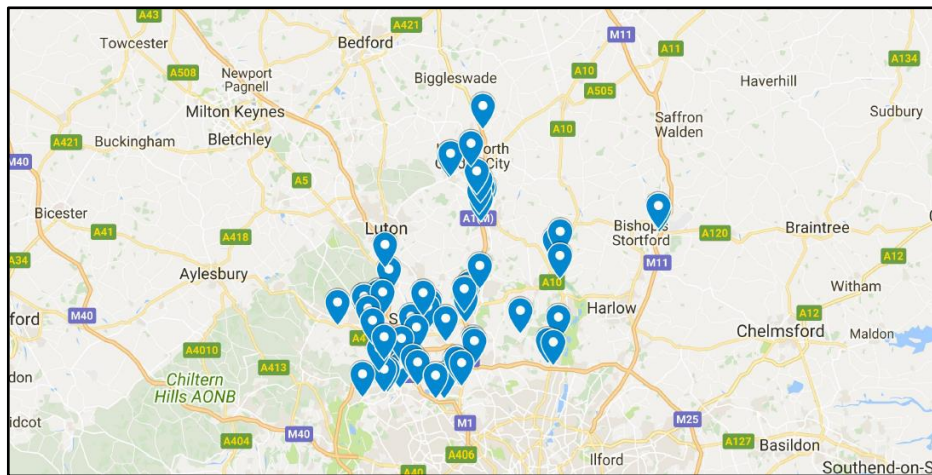


Figure 2: A map showing the locations of serviced accommodation providers that contribute monthly to the Hertfordshire Business Barometer through STR Global.

Year on year room occupancy comparison (%)

Hertfordshire	November 2016	November 2017	November 16/17
Occupancy	77.3%	75.3%	Down 2.6%

Year on year average daily rate comparison (%)

Hertfordshire	November 2016	November 2017	November 16/17
Occupancy	69.7%	71.8%	Up 3%

Year on year revenue per available room comparison (%)

Hertfordshire	November 2016	November 2017	November 16/17
Occupancy	53.9%	54.1%	Up 0.2%



Overall Percent Change

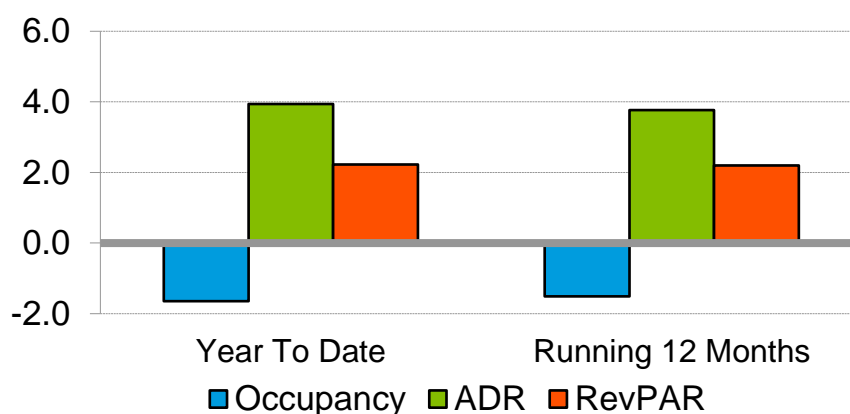


Figure 3: Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

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%	-

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 November 2017

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to November 2017 decreased by -1% when compared with the same period last year, to 443 million.
- The value of those visits also decreased -3% during the same period at £16.1 billion.
- Year to date at the GB level, volume decreased by -2% to 1.6 billion, the value of visits also decreased by -2% to £56.6 billion.
- Looking at England, volume was similar to 2016 in the three months to November 2017 at 376 million visits, while value decreased by -2% to £13.6 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 1.4 billion and the value decreased by -5% to £46.1 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 November 2017 decreased by -5% compared to the same period in 2016 to 712 million visits. The value of these visits also decreased by -6% for the three months against the same period last year to £22 billion.
- Year to date in Great Britain, volume decreased by -4% to 2.7 billion 3+ hour visits and value decreased by -2% to £79.4 billion.
- In England, volume declined by -5% in the three months to November 2017 to 603 million. Similarly, the value of these visits decreased, by -5%, to £18.8 billion.
- Year to date, the volume of 3+ hour visits in England decreased relative to the same period in 2016 by -5%, to 2.3 billion and the value decreased by -5% to £65 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.

