Visit Herts Business Barometer: January 2018

VISIT HERTS

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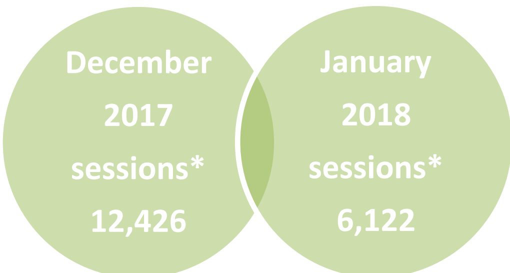
This report is a snapshot of attractions' and serviced accommodation providers' performance in Hertfordshire. This month, attractions in Hertfordshire experienced an increase in visitor footfall of **7.9%** compared to January 2017. In addition, serviced accommodation providers reported a marginal increase in occupancy levels of **1.1%** compared to the same time last year.

News

- Increases in promotional activity and in group and school bookings were reported as factors that positively impacted visitor footfall to Hertfordshire attractions in January 2018.
- On average, **93.6%** of visitors to attractions were domestic, **3%** were long haul and **3.4%** were European. Out of the overseas visitors, attractions reported visitors from France and the USA as being their most prevelant markets.
- **66.7%** of attractions that submitted monthly figures were up this month compared to January 2017.
- Serviced accommodation providers experienced an average occupancy of **64.5%** with average daily rate increasing by **2.9%** compared to January 2017 and revenue per available room experiencing an increase of **4%.**

Visit Herts Website www.visitherts.co.uk

The average dwell time in January 2018 was **1.42 minutes**, with an average number of **2.6 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 January 2018 the Visit Herts website had 6,122 unique website visits and 15,938 total page views.
- The Visit Herts social media channels once again performed well during January. On Twitter we ended the month with 1,455 followers and received 69,623 impressions during this period.
- On Facebook we ended the month with 916 followers/likes and reached 6,714 people with our content.
- On Instagram we ended January with 935 followers and received 817 engagements within this period.
- In January our PR coverage reached 168,000 people.

Travel Trade

- This month saw the team head out to two separate trade shows, Vakantiebeurs in Holland and Excursions in London.
- Hertfordshire has a great presence in Holland, with a dedicated stand and information from partners.
- We had some interesting conversations with the Dutch market, seeing both Dover and Harwich as great entry points nearby to the county, allowing our destination to be positioned as a great stop off before visitors travel north or west across the country.
- Excursions was also a brilliant show, as we were joined by partners St Albans, Hatfield House and Knebworth House and Gardens. The stand was busy throughout the day and spoke to different group organisers who were looking for unique culture, heritage days out.

Attractions

Hertfordshire visitor numbers in January 2018

2017	2018	% change
24,139	**26,057**	**Up 7.9%**

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%**

**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%**

Range of performance

66.7% of attractions that submitted monthly figures were up this month compared to January 2017, ranging from **17.1%** to **73.5%** up.

Performance according to cost, % change January 17/18

Charging	Free
Down 7.7%	**Up 18.3%**

Performance according to attraction type, % change January 17/18

Museums/art galleries	Wildlife attractions/zoos	Visitor/heritage centres
Up 18.1%	**Down 9.4%**	**Up 70.1%**

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

Rural	Urban
Up 6.5%	**Up 64.2%**

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

20,000 or less	50,001 -200,000	Over 200,000
Down 14.4%	**Up 17.1%**	**Down 2.3%**

Factors affecting visitor attraction results

Positive factors
Increased promotional efforts
Increase in group and school visits

Overseas visitors to attractions in January 2018

During January, on average **93.6%** of visitors to attractions were domestic, **3%** were long haul and **3.4%** were European. Out of the overseas visitors, attractions reported visitors from France and the USA as being their most prevelant markets.

Most prevalent overseas visitor groups in January 2018 (%)

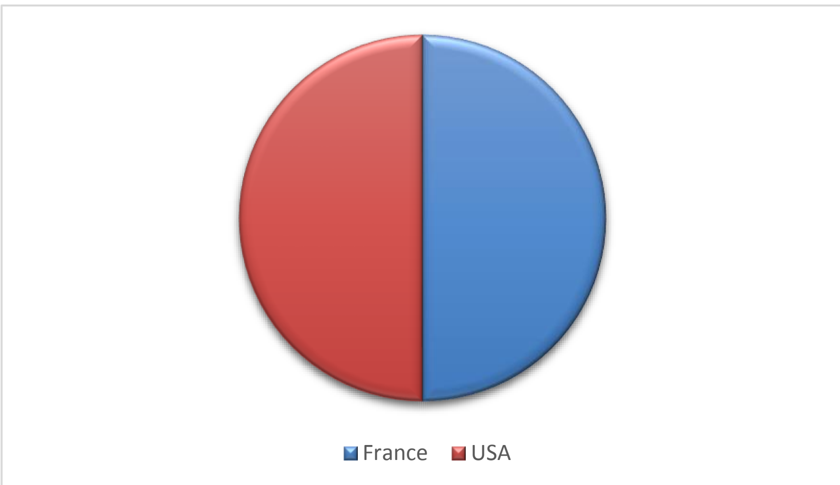


Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in January 2018

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 **1.1%** up on the same month last year. The average daily rate increased by **2.9%** compared to January 2017 and revenue per available room experienced an increase of **4%.**

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	January 2017	January 2018	January 17/18
Occupancy	**63.9%**	**64.5%**	**Up 1.1%**

Year on year average daily rate comparison (%)

Hertfordshire	January 2017	January 2018	January 17/18
Occupancy	**63.1%**	**64.6%**	**Up 2.9%**

Year on year revenue per available room comparison (%)

Hertfordshire	January 2017	January 2018	January 17/18
Occupancy	**40.3%**	**41.9%**	**Up 4%**

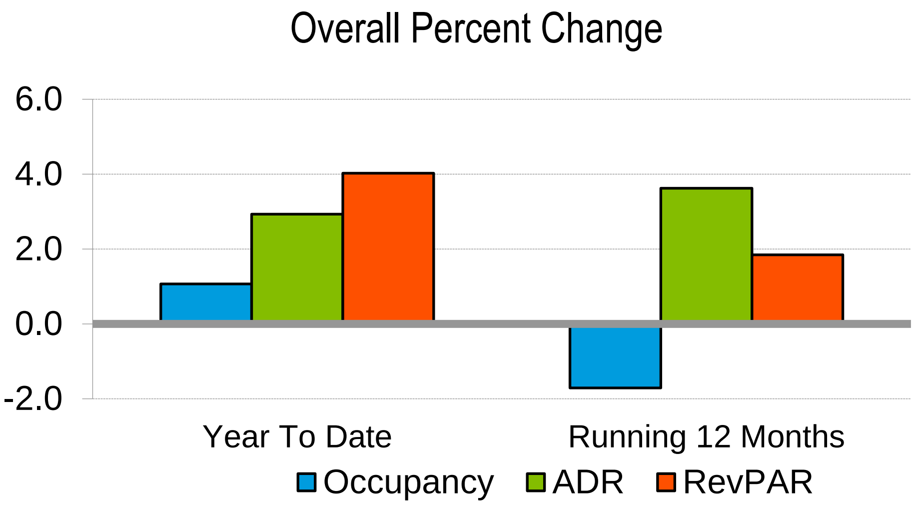


Figure 3: Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

This year … so far (%)

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

Other News

VisitBritain Monthly inbound update December 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

- 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 December 2017

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to December 2017 decreased by -1% when compared with the same period last year, to 441 million.
- The value of those visits decreased by -7% during the same period to £16.2 billion.
- Year to date at the GB level, volume decreased by -2% to 1.8 billion, while the value of visits decreased by -2% to £62.4 billion.
- Looking at England, volume decreased by -1% in the three months to December 2017 at 372 million visits, while value decreased by -8% to £13.4 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 -3%, to 1.5 billion and the value decreased by -5% to £51 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 December 2017 decreased by -5% when compared to 2016, to 718 million visits.
- The value of these visits decreased by -14% for the three months against the same period last year to £22.8 billion.
- Year to date, volume is down by -4% to 2.9 billion 3+ hour visits and value decreased by -4% to £87.9 billion.
- In England, volume declined by -5% in the three months to December 2017 to 607 million. The value of these visits decreased by -16% to 19 billion.
- Year to date, the volume of day visits in England decreased relative to the same period in 2016 by -5%, to 2.5 billion and the value decreased by -7% to £72 billion.

To view the full report click here

VisitEngland Occupancy Survey January 2018

- Room occupancy in January has increased +1% to 65%, whilst bedspace occupancy increased by +1% when compared to January 2017 to 45%. The change in room occupancy was led by an increase in room supply of 1.9% compared to an increase of 2.5% 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 January at £54.35 compared to the previous year.
- City/large town room occupancy remained unchanged at 66% whilst bedspace remained the same at 45%. Seaside increased by +2% to 57% for room occupancy and increased by +2% to 42% for bedspace occupancy. Small town room occupancy increased +1% to 58% and remained unchanged for bedspace occupancy at 41%, with countryside occupancy decreasing -1% for room occupancy to 51% while bedspace occupancy remained unchanged at 35%.

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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