VISIT HERTS GO TO PLACES

Hertfordshire Business Barometer

May 2018

Contents

Key Findings

- Attractions experienced an increase in visitor footfall of **+3.6%** during May 2018 compared to May 2017**,** with **56%** of attractions reporting a stronger performance.
- Additional events have continued to positively impact attractions' performance, while a decrease in the number of group visits was cited as a factor that negatively impacted performance.
- Serviced accommodation providers saw a decrease of **-0.3%** in occupancy compared to May 2017, while RevPAR was down **-0.8%** compared to May 2017.
- **95%** of visitors to attractions were domestic and **4%** were from overseas. Out of the overseas visitors, **75%** of attractions reported guests from the USA as being the most prevalent market.
- In May 2018, the Visit Herts website saw an increase of **+13.6%** in the total number of sessions compared the previous month.

Comparison May 2017/18

	Attraction visitor numbers	3.6%	↑
Serviced	Serviced accommodation- all serviced accommodation occupancy- source: STR Global Ltd	0.3%	↓

Visit Herts Marketing Update

Digital

In May the Visit Herts website had **11,535** users visit the website and **31,544** total pageviews.
The Visit Herts social media channels performed well during May. On Facebook we ended the month with **1,142** followers/likes, posted 30 times throughout the month, and had **44,462** impressions on these posts. On Instagram we ended May with **1,137** followers and received **860** engagements within this period. On Twitter we ended the month with **1,769** followers, sent out **102** tweets throughout the month, and received **82,714** impressions during this period.

PR

In May we sent out one press release – 'New Chief Executive Officer of Visit Herts announced'. Our press coverage for May 2018 reached **48,617** people.

Travel Trade

After a busy travel trade season, work started this month on assessing the first full year of activity for Hertfordshire, with initial plans set out for the new 2018-2019 travel trade strategy. Communications with Dutch tour operators met earlier in the year continued, with Garden Tours, a Dutch tour operator wanting to set up a new Hertfordshire tour in their programme. Further activity included securing a stand at World Travel Market in November for Hertfordshire, as well as securing a dedicated feature in the July edition of Group Leisure magazine for the county.

Website

12,845 sessions
1.31 average dwell time
2.46 pages viewed per session

Social Media

Twitter: **1,769** followers

Facebook: **1,142** followers

Instagram: **1,137** followers

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Visitor Attractions

Visitor Attractions

Visitor numbers May 2018/2017

2017	2018	% change
30,611	31,699	Up 3.6%

Range of performance

56% of Hertfordshire attractions were up this month, ranging from **+5%** up to **+42%** up, with **44%** of attractions reporting a reduced footfall, ranging from **-0.7%** down to **-56%** down.

Attractions up	Attractions down
56%	44%

Performance according to cost May 2018/2017

Charging	Free
Up 9.9%	Down 8.3%

Performance according to attraction size May 2018/2017

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
Down 35.2%	n/a	n/a	Up 19.1%

Performance according to attraction location May 2018/2017

Urban	Rural
Down 0.2%	Up 4%

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	98,566	103,326	Up 4.8%	228,953	235,461	Up 2.8%
May	30,611	31,699	Up 3.6%	259,564	267,160	Up 3%
June	-	-	-	-	-	-
July	-	-	-	-	-	-
August	-	-	-	-	-	-
September	-	-	-	-	-	-
October	-	-	-	-	-	-
November	-	-	-	-	-	-
December	-	-	-	-	-	-
May*	30,611	31,699	Up 3.6%	259,564	370,736	Up 43%

**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 and are included for reference only.*

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Factors influencing visitor attractions' performance

Positive

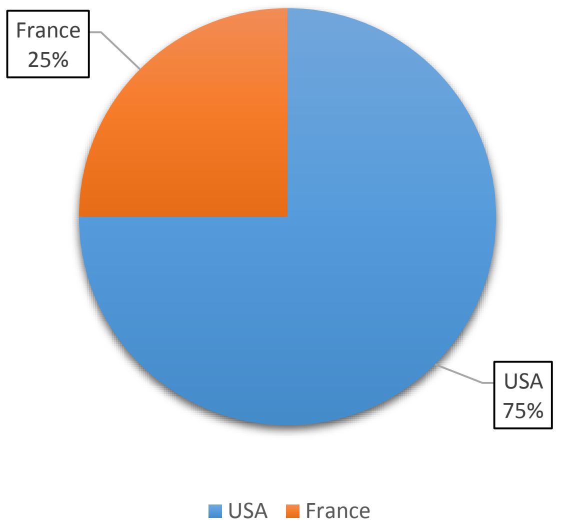
- Events held helped boost the number of visitors to attractions.
- Increased marketing and promotional activity.

Negative

- Less TV and radio exposure.
- Reduced number of group visits.

Origin of visitors to attractions

- During May 2018, **95%** of visitors to attractions were domestic, **2%** long haul and **2%** European.
- Out of the overseas visitors, **75%** of attractions reported guests from the USA being their most prevalent market.



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

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Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **76.4%.**
- Hertfordshire accommodation providers experienced a decrease of -**0.3%** in occupancy levels compared to May 2017.
- Revenue per available room was down **-0.8%** and average daily rate was also down by **-0.5%** compared to May 2017.

Year on year room occupancy comparison (%)

Hertfordshire	May 2017	May 2018	May 17/18
Occupancy	76.7%	76.4%	Down 0.3%

This year … so far (%)

Hertfordshire	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	June 2018
Occupancy	64.5%	71.8%	71.7%	73.3%	76.4%	-
	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.

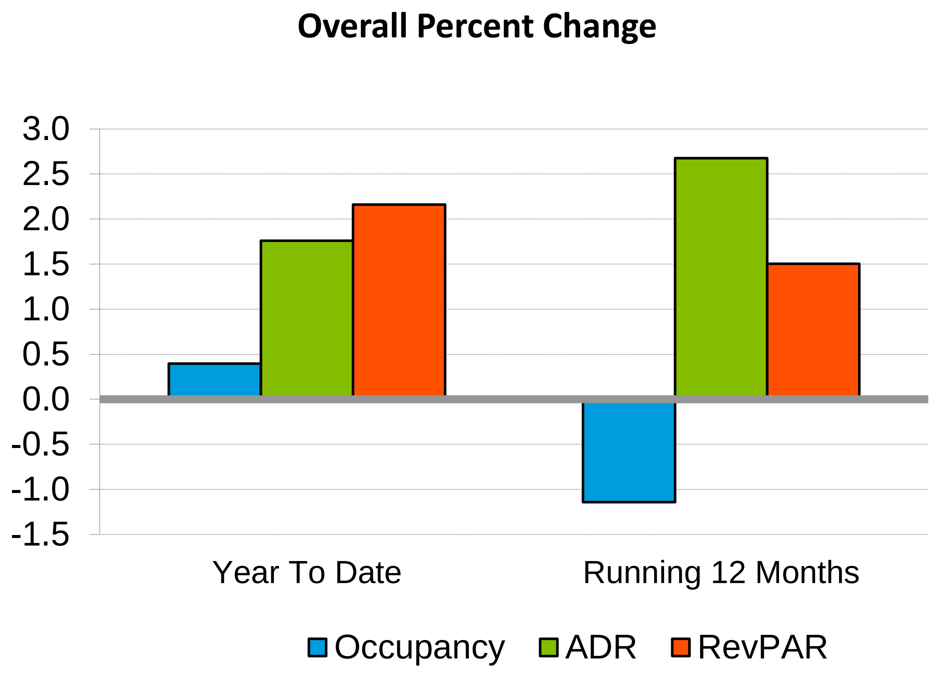
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	May 2017	May 2018	May 17/18
Occupancy	£71.34	£70.99	Down 0.5%

Year on year revenue per available room comparison (%)

Hertfordshire	May 2017	May 2018	May 17/18
Occupancy	£54.70	£54.25	Down 0.8%



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

Other News

Other News

VisitEngland GB Day visits 2018: May 2018 GB & England

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to May 2018 decreased by -8% when compared with the same period last year, to 425 million.
- The value of those visits decreased by -3% during the same period to £15.8 billion. Year to date at the GB level volume declined by -4% to 677 million and value of visits increased +2% to £24.8 billion.
- Looking at England, volume decreased by -9% in the three months to May 2018 at 356 million visits, while value stayed at a similar level at £13.0 billion compared to the same period in 2017. Year to date the volume of day visits in England decreased relative to the same period in 2017 by -4%, to 571.5 million and the value increased by +4% from 2017 at £20.6 billion.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to May 2018 has decreased by -6% to 711 million visits, versus the same period in 2017. The value of these visits increased by +1% for the three months against the same period last year to £22.3 billion.
- Year to date, volume is down by -4% to 1.1 billion 3+ hour visits and value increased by +10% to £36.5 billion.
- In England, volume declined by -6% in the three months to May 2018 to 599 million. However, the value of these visits increased, by +4%, to £18.4 billion.
- Year to date the volume of day visits in England increased relative to the same period in 2017 by +2%, to 951 million and the value increased by +14% to £30.7 billion.

To view the full report click here

VisitEngland Occupancy Survey: April 2018 results

VisitEngland

Summary of Results

- Room occupancy in April remained unchanged at 77%, whilst bedspace occupancy decreased by -1% when compared to April 2017 at 55%. The change in room occupancy was led by an increase in room supply of 1.5% compared to an increase of 0.7% in demand compared to the same month in 2017.
- RevPar, which is the total room revenue divided by the total number of available rooms, remained unchanged in April at £71.01 compared to the previous year. City/large town room occupancy was unchanged at 78% whilst bedspace occupancy decreased by -1% to 55%. Seaside decreased by 2% to 78% for room occupancy and 2% to 61% for bedspace occupancy.
- Small town room occupancy decreased 1% to 72% and remained unchanged for bedspace occupancy at 53%, with countryside decreasing -1% for room occupancy to 68% while bedspace occupancy decreased -1% to 48%.
- Looking at room occupancy rates by establishment size most categories remained relatively unchanged except for 1-25 rooms which decreased by -3% to 72%. For bedspace, 1-25 room establishments decreased by -2% to 54%, 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 the North East and from Yorkshire & Humberside with a -2% decrease. For bedspace occupancy, the North East and from Yorkshire & Humberside decreased by -2%, whereas all other regions remained relatively unchanged with 1% or less change.

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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, May 2018. Thank you.