

Hertfordshire Business Barometer

June 2018



Contents

- [Summary of findings](#) 3
- [Marketing update](#) 4
- [Visitor Attractions: monthly performance](#) 6
- [Serviced Accommodation: monthly performance](#) 10
- [Other news: national picture](#) 13
- [Glossary](#) 15



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Key Findings

- Visitor attractions experienced a decrease in visitor footfall of **-4.4%**, compared to June 2017.
- Reduced opening times and a decrease in group visits were cited as factors that negatively impacted attractions' performance in June 2018.
- Serviced accommodation providers saw a decrease of **-0.1%** in occupancy compared to June 2017, while RevPAR was also down, seeing a decrease of **-0.6%** compared to June 2017.
- **94%** of visitors to attractions were domestic and **6%** were from overseas. Out of the European visitors, **50%** of attractions reported guests from France as being their most prevalent overseas markets, while out of long-haul visitors, **33%** of attractions reported guests from the USA as their most prevalent market.
- In June 2018, the Visit Herts website saw an increase of **+1.5%** in the total number of sessions compared to May 2018.

Comparison June 2017/18



Attraction visitor numbers

4.4%



Serviced accommodation- all serviced accommodation occupancy- source: STR Global Ltd

0.1%



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Visit Herts Marketing Update



Digital

In June, the Visit Herts website had **11,547** users visit the website and **27,906** total pageviews. The Visit Herts social media channels performed well during June. On Twitter we ended the month with **1,831** followers, we sent out **94** tweets throughout the month, and received **64,617** impressions during this period. On Instagram, we ended June with **1,170** followers and received 789 engagements within this period. On Facebook, we ended the month with **1,185** followers/likes, posted **29** times, and had **40,459** impressions on these posts.



Travel Trade

With the busy summer holidays, this time of the year sees the team plan for the start of the selling in season from October – March. The team worked on travel trade plans and strategies for several of the Discover England Fund projects that feature Herts to encourage more visitors to the county, along with planning future familiarisation trips and itinerary ideas.

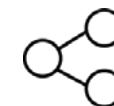


Website

13,033 sessions

1.18 average dwell time

2.14 pages viewed per session



Social Media



1,831 followers



1,185 followers



1,170 followers



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Visitor Attractions





Visitor Attractions

Visitor numbers June 2018/2017

2017	2018	% change
62,257	59,488	Down 4.4%

Range of performance

78% of Hertfordshire attractions were down this month, with 22% of attractions reporting an increase in footfall, ranging from +1.6% up to +21% up.

Attractions up	Attractions down
22%	78%

Performance according to cost June 2018/2017

Charging	Free
-3.5%	-10.1%

Performance according to attraction size June 2018/2017

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
-36.8%	n/a	-35.3%	+21%

Performance according to attraction location June 2018/2017

Urban	Rural
-20.2%	-3.7%

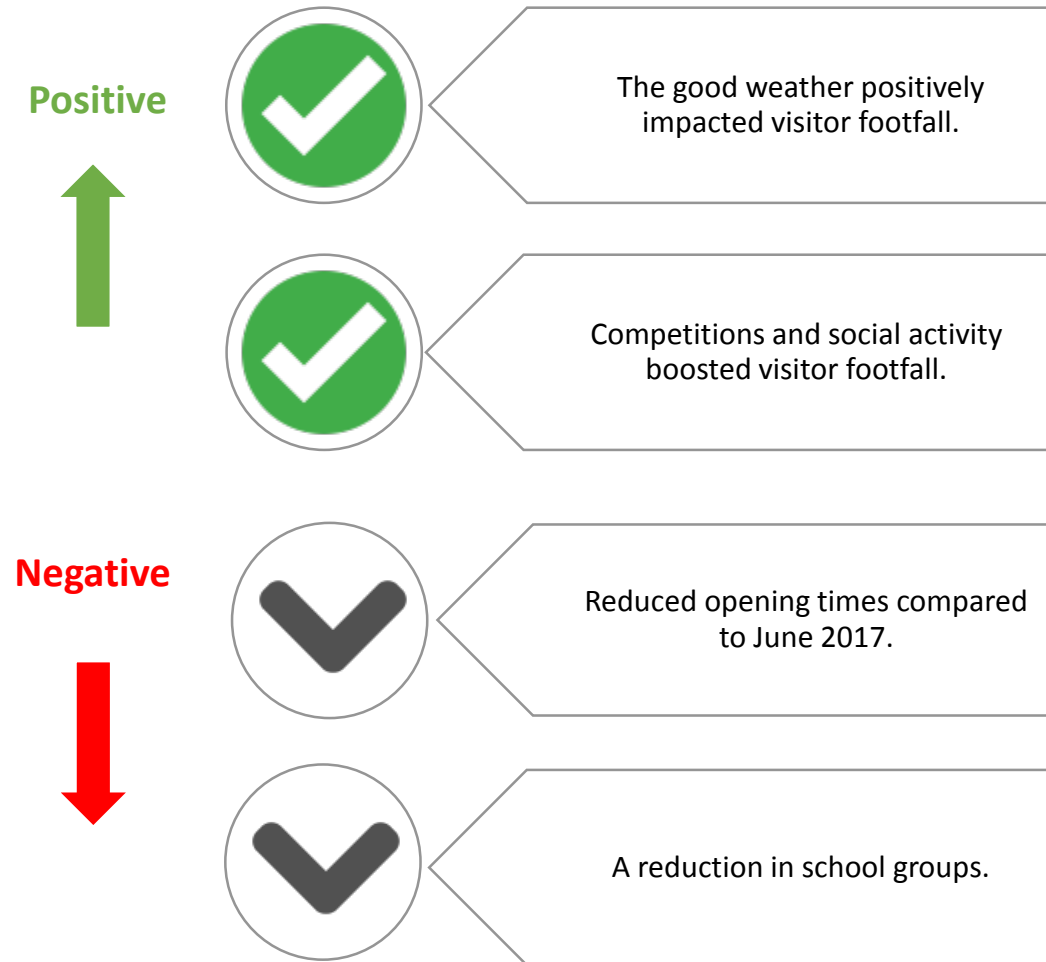


Visitor numbers for the year to date (YTD)

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	62,257	59,488	Down 4.4%	321,821	326,648	+1.5%
July	-	-	-	-	-	-
August	-	-	-	-	-	-
September	-	-	-	-	-	-
October	-	-	-	-	-	-
November	-	-	-	-	-	-
December	-	-	-	-	-	-
June*	62,257	59,488	Down 4.4%	321,821	430,224	Up 33.9%

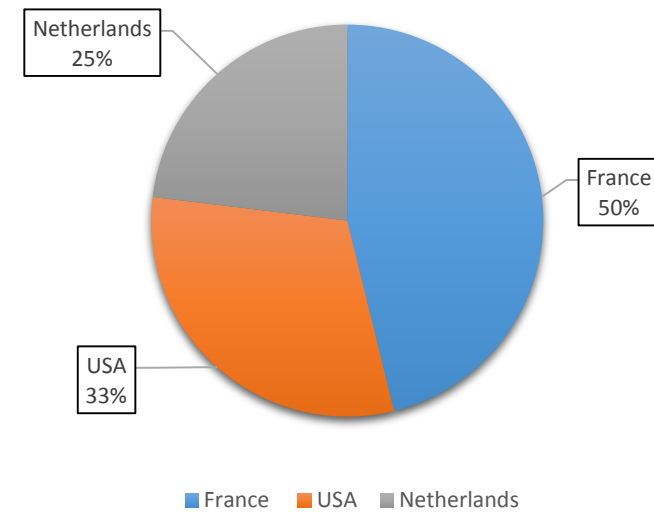
**Please note: The figures in the blue part of the table above are the baseline for all calculations found within this section. The data reported here is strictly 'like for like', excluding figures for attractions that reported they were closed this month or the same month the previous year, or those 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.*

Factors influencing visitor attractions' performance



Origin of visitors to attractions

- During June 2018, **94%** of visitors to attractions were domestic, **2%** long haul and **4%** European.
- Out of the overseas visitors, **50%** of attractions reported guests from France as being their most prevalent market, alongside **33%** reporting visitors from the USA.



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



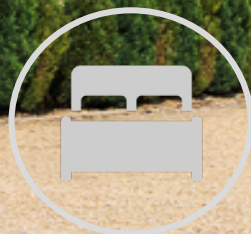


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Hertfordshire Accommodation





Serviced Accommodation

- According to figures from STR Global for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **77.1%**.
- Hertfordshire accommodation providers experienced a slight decrease of **-0.1%** in occupancy levels compared to June 2017.
- Revenue per available room was down **-0.6%**, while average daily rate was also down by **-0.5%** compared to June 2017.

Year on year room occupancy comparison (%)

Hertfordshire	June 2017	June 2018	June 17/18
Occupancy	77.2%	77.1%	-0.1%

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%	77.1%
	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.



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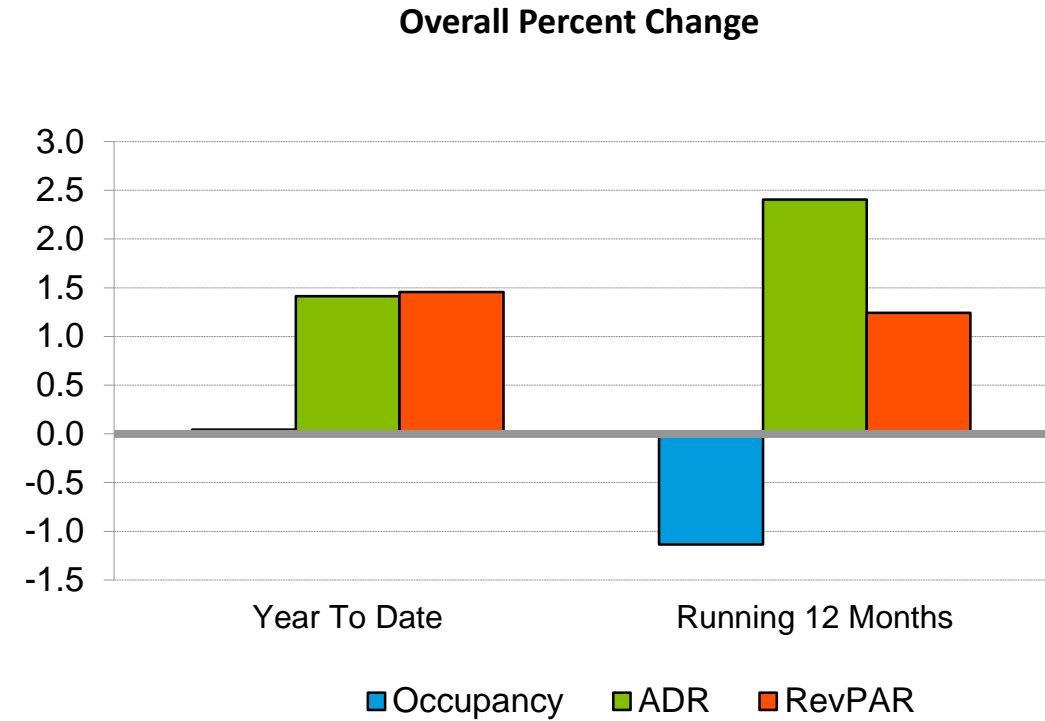
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	June 2017	June 2018	June 17/18
Occupancy	£74.36	£74.00	-0.5%

Year on year revenue per available room comparison (%)

Hertfordshire	June 2017	June 2018	June 17/18
Occupancy	£57.41	£57.09	-0.6%



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



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Other News





Other News



VisitEngland GB Day visits 2018: June 2018 GB & England

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to June 2018 decreased by -1% when compared with the same period last year, to 447 million.
- The value of those visits remained the same when compared to the previous year at £15.8 billion. ☐ Year to date at the GB level volume decreased by -3% to 827 million and the value of visits increased by +1% to £29.7 billion.
- Looking at England, volume decreased by -2% in the three months to June 2018 at 374 million visits, whilst value increased by +6% to £13.1 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 -3%, to 695 million and the value increased by +4% compared to the same period in 2017 to £24.4 billion.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to June 2018 decreased by -1% compared to the same period in 2017 to 730 million visits.
- The value of these visits decreased by -1% for the three months against the same period last year to £21.6 billion. ☐ Year to date, volume is down by -3% to 1.4 billion 3+ hour whereas value increased by +6% to £43 billion.
- In England, volume declined by -2% in the three months prior to June 2018 to 610 million. The value of these visits increased by +4%, to £17.9 billion.
- Year to date the volume of day visits in England decreased relative to the same period in 2017 by -4%, to 1.1 billion where the value increased by +10% to £35.9 billion.

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

VisitEngland Occupancy Survey: May 2018 results

Summary of Results

- Room occupancy in May remained unchanged at 79%, whilst bedspace occupancy increased by +2% when compared to May 2017 at 57%. The change in room occupancy was led by an increase in room supply of 1.3% compared to an increase of 1.6% in demand compared to the same month in 2017.
- RevPAR, which is the total room revenue divided by the total number of available rooms, decreased by 1% in May to £94.92 compared to the previous year.
- City/large town room occupancy remained unchanged 80% whilst bedspace occupancy increased by 1% to 56%. Seaside increased by 3% to 80% for room occupancy and 4% to 61% for bedspace occupancy.
- Small town room occupancy increased 1% to 77% and 2% to 56% for bedspace occupancy, with countryside increasing 2% for room occupancy to 73% while bedspace occupancy increased 2% to 51%.
- Looking at room occupancy rates by establishment size most categories remained relatively unchanged. For bedspace, all categories remained relatively unchanged with changes of 1% or less.

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

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, June 2018. Thank you.



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