Hertfordshire Business Barometer

July 2018

Contents

Key Findings

- Visitor attractions experienced a **+2.6%** increase in visitor footfall, compared to July 2017.

- The good weather experienced in July 2018 and an increased schedule of events and festivals were cited by attractions as having positively impacted visitor footfall. Although, particular attractions also cited the hot weather as having had a negative impact, with visitors perhaps opting to visit outdoor places.

- Serviced accommodation providers saw an increase in occupancy of **+1.7%** compared to July 2017, while RevPAR saw a increase of **+2.2%** compared to July 2017.

- **95%** of visitors to attractions were domestic and **5%** were from overseas. Out of the overseas visitors, **50%** of attractions reported guests from France as being their most prevalent overseas market, alongside **33%** of attractions reported guests from the USA as their most prevalent market.

- In July 2018, the Visit Herts website saw an increase of **+2%** in the total number of sessions compared to June 2018.

Comparison July 2017/18

Attraction visitor numbers	+2.6%	↑
Serviced accommodation- all serviced accommodation occupancy- source: STR Global Ltd	+1.7%	↑

Visit Herts Marketing Update

Digital

In July, the Visit Herts website had **11,560** users and **29,489** total pageviews. The Visit Herts social media channels performed well during July. On Facebook we ended the month with **1,204** followers/likes, posted 30 times throughout the month, and had **16,837** impressions on these posts. On Instagram we ended July with **1,200** followers and received **1,173** engagements within this period. On Twitter we ended the month with **1,867** followers, sent out 100 tweets throughout the month, and received **61,502** impressions during this period.

PR

In July, we sent out two press releases – 'Festival fun in Hertfordshire' and 'Spend a spectacular Summer in Herts!'. Our press coverage for July 2018 reached **128,634** people.

Travel Trade

This month, the trade team were busy planning exhibitions and show attendance for the next trade season which starts in October. Time was also spent looking at establishing a new travel trade working group for partners, as well as working with a Dutch tour operator to set up a possible Autumn fam trip for a dedicated gardens tour in the county.

Website

13,304 sessions
1.29 average dwell time
2.22 pages viewed per session

Social Media

1,867 followers

1,204 followers

1,200 followers

Visitor Attractions

Visitor Attractions

Visitor numbers July 2018/2017

2017	2018	% change
69,658	71,451	Up 2.6%

Range of performance

60% of Hertfordshire attractions were down this month, with **40%** of attractions reporting an increase in footfall, ranging from **+11.8%** up to **+344.3%** up.

Attractions up	Attractions down
40%	60%

Performance according to cost July 2018/2017

Charging	Free
+11.3%	-32.5%

Performance according to attraction size July 2018/2017

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
-2.4%	n/a	-24.4%	+27%

Performance according to attraction location July 2018/2017

Urban	Rural
-0.1%	+71.6%

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	69,658	71,451	Up 2.6%	391,479	398,099	+1.7%
August	-	-	-	-	-	-
September	-	-	-	-	-	-
October	-	-	-	-	-	-
November	-	-	-	-	-	-
December	-	-	-	-	-	-
July*	69,658	97,451	Up 39.9%	391,479	527,675	Up 34.8%

**Please note: The figures in the blue part of the table above are the baseline for all calculations found within this report. 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

Positive

The good weather experienced in July 2018 contributed to an increase in visitor footfall.

A larger number of events and festivals took place at attractions in July 2018, compared to the same time the previous year.

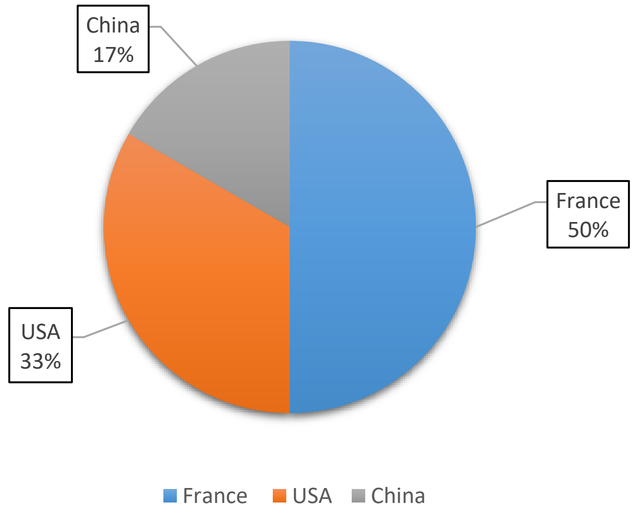
Negative

Particular attractions cited the hot weather as a negative factor, with some visitors perhaps opting to visit other places.

Less TV coverage compared to July 2017.

Origin of visitors to attractions

- During July 2018, **95%** of visitors to attractions were domestic, **2%** long haul and **3%** 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 July 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 **83.6%.**
- Hertfordshire accommodation providers experienced an increase of **+1.7%** in occupancy levels compared to July 2017.
- Revenue per available room was up **+2.2%**, while average daily rate also saw an increase (**+0.5%)** compared to July 2017.

Year on year room occupancy comparison (%)

Hertfordshire	July 2017	July 2018	July 17/18
Occupancy	82.2%	83.6%	+1.7%

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	83.6%	-	-	-	-	-

Map showing the locations of serviced accommodation providers that contribute monthly to the Hertfordshire Business Barometer through STR Global.

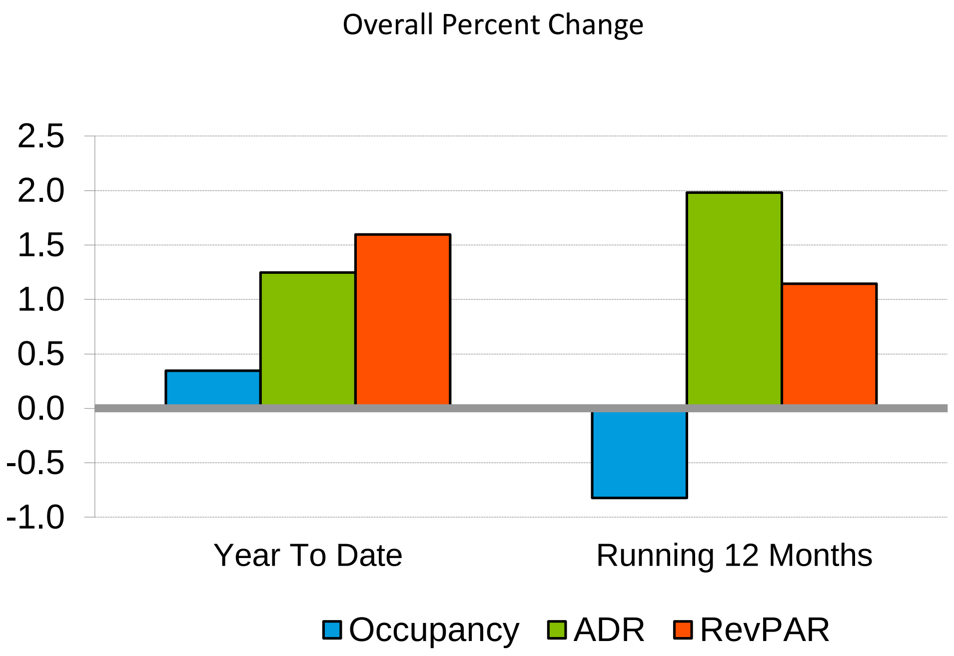
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	July 2017	July 2018	July 17/18
ADR	£72.65	£73.01	+0.5%

Year on year revenue per available room comparison (%)

Hertfordshire	July 2017	July 2018	July 17/18
RevPAR	£59.74	£61.05	+2.2%



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: July 2018 GB & England

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months prior to July 2018 was static compared to the same period last year, at 445 million
- The value of those visits increased by +1% to £15.1 billion compared to the same period in 2017
- Year to date at the GB level, volume decreased by -4% to 976 million but the value of visits remained at a similar level at £34.5 billion Looking at England, volume of visits was static in the three months prior to July 2018 at 375 million visits, whilst value increased by +8% to £12.8 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 821 million, whereas the value increased by +3% to £28.6 billion compared to 2017.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months prior to July 2018 remained static at 743 million visits when compared to the same period in 2017
- The value of these visits decreased by -4% to £21.1 billion compared to the same period last year Year to date, volume is down by -4% to 1.6 billion but value increased by +3% to £50.1 billion
- In England, for the three months prior to July 2018, volume was static at 624 million, whilst value increased by +1% to £17.7 billion
- Year to date the volume of day visits in England decreased by -4% relative to the same period in 2017 to 1.4 billion. The value of these visits however increased by +7% to £42 billion.

To view the full report click here

VisitEngland Occupancy Survey: June 2018 results

Summary of Results

- Room occupancy in June remained increased by +2% to 82% whilst bedspace occupancy increased by +3% when compared to June 2017 to 58%. The change in room occupancy was led by an increase in room supply of 1.4% compared to an increase of 3.5% 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 3% in June to £84.13 compared to the previous year.
- City/large town room occupancy increased by +2% to 83% whilst bedspace occupancy increased by 2% to 58%.
- Seaside increased by 2% to 83% for room occupancy and 1% to 61% for bedspace occupancy.
- Small town room occupancy increased 3% to 80% and 2% to 58% for bedspace occupancy, with countryside stable for room occupancy at 76% while bedspace occupancy remained stable at 52%.
- Looking at occupancy rates by establishment size, larger establishments with 101+ rooms increased by +3% in room occupancy and 2% in bedspace occupancy. All other categories remained relatively stable with changes of 1% or less for both room and bedspace occupancy. Looking at occupancy rates by region, the North West and North East increased to the greatest extent, by +6% and 4% respectively for room occupancy and 3% for bedspace occupancy for both regions.

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, July 2018. Thank you.