VISIT HERTS

GO TO PLACES

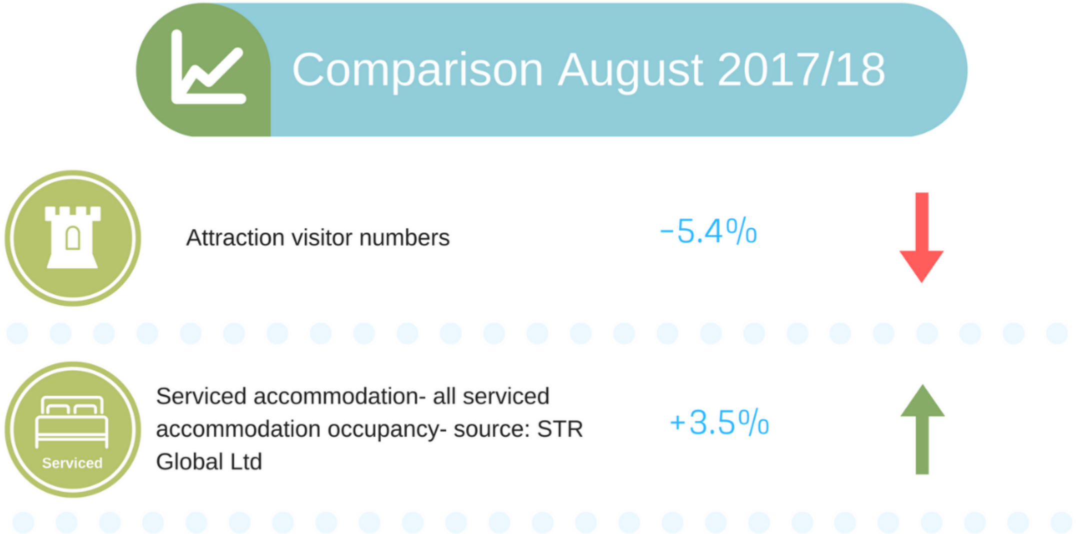
Hertfordshire Business Barometer

August 2018

Contents

Key Findings

- Visitor attractions experienced a **-5.4%** decrease in visitor footfall, compared to August 2017.
- The good weather experienced in August 2018 was cited by some attractions as having negatively impacted visitor footfall, with visitors perhaps opting to visit other areas or attractions instead. However, of those attractions that saw an increase in footfall, factors cited included strong marketing campaigns and an increase in the number of events held.
- Serviced accommodation providers saw an increase in occupancy of **+3.5%** compared to August 2017, while RevPAR also saw a increase of **+2.5%** compared to August 2017.
- **94%** of visitors to attractions were domestic and **7%** were from overseas. Out of the overseas visitors, **33%** of attractions reported guests from France as being their most prevalent overseas market.
- In August 2018, the Visit Herts website saw an increase of **+46%** in the total number of sessions compared to July 2018.



Visit Herts Marketing Update

Digital

In August the Visit Herts website had **17,087** users visit the website and **41,606** total pageviews. The Visit Herts social media channels performed well. On Twitter we ended the month with **1,896** followers, we sent out **99** tweets throughout the month, and received **67,971** impressions during this period. On Instagram we ended August with **1,252** followers and received **1,190** engagements within this period. On Facebook we ended the month with **1,209** followers/likes, posted **28** times, and had **19,297** impressions on these posts.

PR

Our press coverage for August 2018 reached **93,826** people.

Travel Trade

During August, the team has focused on travel trade planning and activity for several Discover England Funds, including Gourmet Garden Trails and US Connections. The team has been updating and sourcing feedback from overseas operators in the Dutch and German markets about how best to provide information to them, along with ideas and activity proposals. The team also helped organise visits to the county for the US Connections project, taking in Knebworth & Hatfield House, in order for content writers to experience their offer and include them in the inspirational itineraries for the trade. The team has also provided recommendations for a large international sports group staying in the county following a large match in London, highlighting how Hertfordshire can be positioned as a great place to stay and visit to international groups visiting London as a great place to stay and visit.

Website

19,453 sessions

1.24 average dwell time

2.14 pages viewed per session

Social Media

1,896 followers

1,209 followers

1,252 followers

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Visitor Attractions

Visitor Attractions

Visitor numbers August 2017/2018

2017	2018	% change
120,082	113,590	-5.4%

Range of performance

56% of Hertfordshire attractions were up this month, ranging from **+0.7%** up to **+75.5%** up, with **44%** of attractions reporting an decrease in footfall.

Attractions up	Attractions down
56%	44%

Performance according to cost August 2017/2018

Charging	Free
-4%	-14%

Performance according to attraction size August 2017/2018

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
-8.4%	n/a	-28.6%	n/a

Performance according to attraction location August 2017/2018

Urban	Rural
+12.8%	-5.8%

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	120,082	113,590	Down 5.4%	511,561	511,689	OP
September	-	-	-	-	-	-
October	-	-	-	-	-	-
November	-	-	-	-	-	-
December	-	-	-	-	-	-
August*	120,082	113,590	Down 5.4%	511,561	641,265	Up 25.4%

**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.*

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Factors influencing visitor attractions' performance

Positive

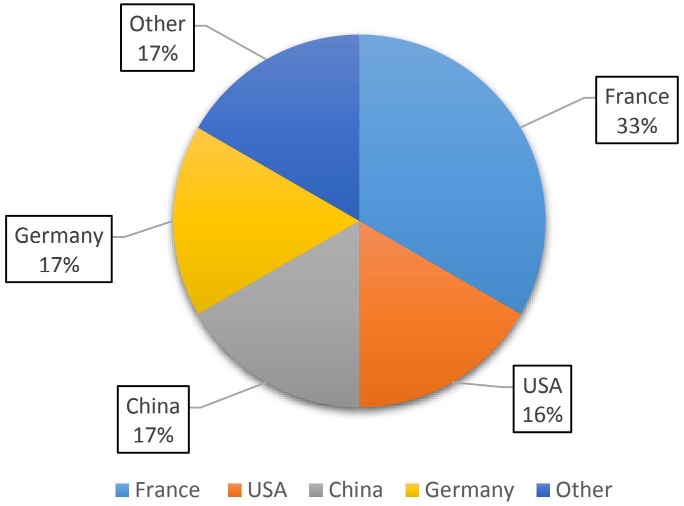
- Strong marketing campaigns and impact of television advertising.
- Increased number of events held in comparison to August 2017.

Negative

- Major events were not as well attended as the previous year due to poor weather.
- The hot weather in parts of August discouraged visits to particular attractions.

Origin of visitors to attractions

- During August 2018, **94%** of visitors to attractions were domestic, **2%** long haul and **5%** European.
- Out of the overseas visitors, **33%** of attractions reported guests from France as being their most prevalent market.



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

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **78.2%.**
- Hertfordshire accommodation providers experienced an increase of **+3.5%** in occupancy levels compared to August 2017.
- Revenue per available room was up **+2.5%**, while average daily rate saw a slight decrease **(-1%)** compared to August 2017.

Year on year room occupancy comparison (%)

Hertfordshire	August 2017	August 2018	August17/18
Occupancy	75.6%	78.2%	+3.5%

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%	78.2%	-	-	-	-

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

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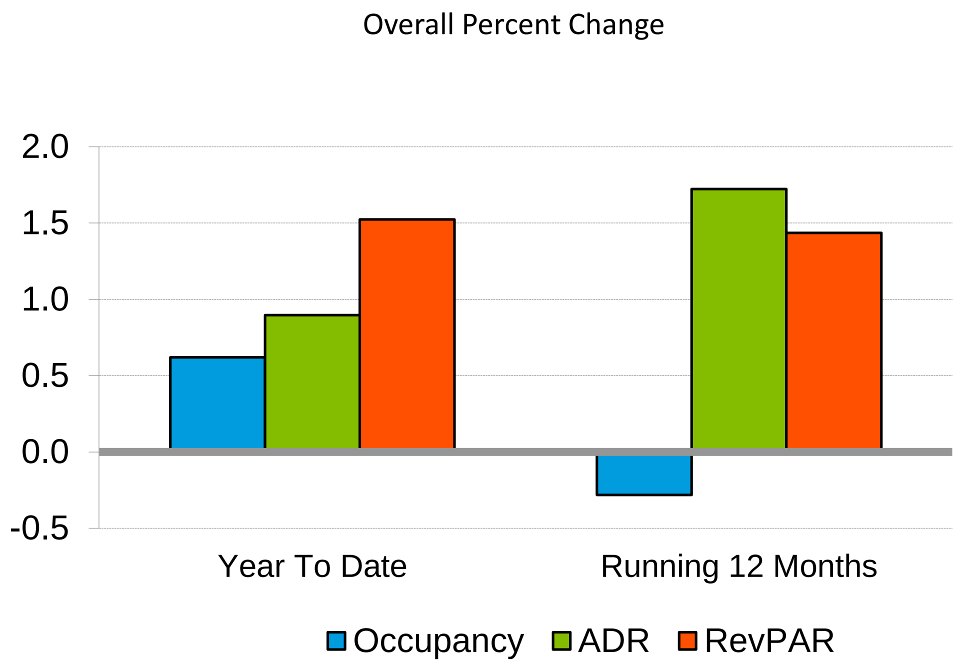
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	August 2017	August 2018	August 17/18
ADR	£65.86	£65.23	-1%

Year on year revenue per available room comparison (%)

Hertfordshire	August 2017	August 2018	August 17/18
RevPAR	£49.76	£50.99	+2.5%



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: August 2018 GB & England

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to August 2018 decreased to 467 million, a drop of -7% when compared with the same period last year.
- The value of those visits decreased by -1% during the same period to £16 billion.
- Year to date at the GB level, volume decreased by -5% to 1.1 billion but the value of visits increased by +1% to £40.8 billion when compared to the same period in 2017
- Looking at England, volume decreased by -5% to 393 million visits in the three months to August compared to the same period in 2017, while value increased by +5% to £13.4 billion.
- Year to date the volume of day visits in England decreased by -4% to 965 million when compared to 2017. Value however increased by +5% to £34.0 billion compared to the same period.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to August 2018 decreased by -7% to 757 million compared to the same period in 2017 The value of these visits decreased by -7% to £22.5 billion compared to the same period in 2017 .
- Year to date, volume is down by -5% to 1.9 billion 3+ hour visits but value increased by +3% to £59.1 billion compared to 2017.
- In England, volume declined by -6% to 633 million in the three months to August 2018. The value of these visits decreased by -2%, to £18.8 billion Year to date the volume of 3+ hour day visits in England decreased relative to the same period in 2017 by -5% to 1.6 billion while the value increased by +7% to £49.5 billion.

To view the full report click here

VisitEngland Occupancy Survey: July 2018 results

VisitEngland

Summary of Results

- Room occupancy in July increased by +2% to 86% whilst bedspace occupancy increased by +1% when compared to July 2017 to 60%. The change in room occupancy was led by an increase in room supply of 1.4% and an increase of 3.1% in demand, when compared to the same month in 2017.
- RevPar, which is the total room revenue divided by the total number of available rooms, increased by 6% in July to £91.15 compared to the previous year.
- City/large town room occupancy increased by +2% to 86% whilst bedspace occupancy increased by 1% to 60%. Seaside room occupancy increased by 2% to 88%, whilst bedspace occupancy was stable at 66%.
- Small town room occupancy increased 2% to 82% and was stable at 59% for bedspace occupancy, with countryside decreasing by -1% for both room and bedspace occupancy, at 77% and 53% respectively.
- Looking at occupancy rates by establishment size, larger establishments with 101+ rooms increased by +2% in room occupancy and 1% 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, London increased to the greatest extent, by +4% in room occupancy and 2% in bedspace occupancy. East Midlands decreased to the greatest extent, by -2% in room occupancy and 1% in bedspace occupancy.

To view the full report click here

UKinbound Business Barometer Survey 2018: July & August Key findings

UKinbound's Business Barometer bimonthly survey sets a benchmark for trade conditions and industry confidence among inbound tourism businesses, as well as exploring topical industry issues.

- Polarised summer for attractions: Over ½ (54%) saw an increase & 46% a decline in visits.
- Strong summer for majority of TOs: 57% saw an increase in bookings.
- Decent summer for service providers: 59% saw an increase in bookings.
- Mixed picture for attraction revenues 54% experienced an increase, 23% about the same & 23% saw a decrease.
- Majority of TOs saw no increase: 53% said about the same or lower.
- Service providers going strong: 65% saw an increase in summer revenues.

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, August 2018. Thank you.