VISIT HERTS

GO TO PLACES

Hertfordshire Business Barometer

September 2018

Contents

Key Findings

- In September 2018, Hertfordshire attractions experienced a **+20.4%** increase in visitor footfall, compared to September 2017.
- An increase in the number of events hosted compared to the previous year, was cited by particular attractions as having positively impacted visitor footfall. Alongside this, other positive factors included; successful summer campaigns and good weather.
- Serviced accommodation providers saw a slight increase in occupancy of **+0.5%** compared to September 2017, while RevPAR also saw a increase of **+0.7%** compared to September 2017.
- **96.3%** of visitors to attractions were domestic and **3.7%** were from overseas. Out of the overseas visitors, **43%** of attractions reported guests from France as being their most prevalent overseas market.
- In September 2018, the Visit Herts website saw a decrease in the total number of sessions compared to August 2018. This is perhaps due to the end of the summer holidays.

Comparison September 2017/18

	Attraction visitor numbers	+20.4% ↑
Serviced	Serviced accommodation- all serviced accommodation occupancy- source: STR Global Ltd	+0.5% ↑

Visit Herts Marketing Update

Digital

In September, the Visit Herts website had **9,534** users visit the website and **23,217** total pageviews. The Visit Herts social media channels performed well during September. On Twitter we ended the month with **1,942** followers, we sent out **97** tweets throughout the month, and received **63,024** impressions during this period. On Instagram we ended September with **1,272** followers and received **1,057** engagements within this period. On Facebook we ended the month with **1,214** followers/likes, posted **32**, and had **19,369** impressions on these posts.

Travel Trade

September was a busy month for the Hertfordshire travel trade team. Whilst preparations continued for attendance at World Travel Market in November, the team were delighted to host several US operators as part of the US Connections project, with visits to both Knebworth House and an overnight stay at The Grove. Visit Herts also proudly hosted the UKinbound AGM, in partnership with Warner Bros. Studio Tour, with the UK's travel trade industry convening to hear the very latest news from Brexit, developments at Warner Bros and a welcome from Visit Herts. Finally, the first ever Hertfordshire travel trade working group meeting took place at Brocket Hall, with nine suppliers attending. The group discussed the Visit Herts travel trade strategy going forward, as well as received training on the US Connections project.

Website

10,844 sessions
1.24 average dwell time
2.14 pages viewed per session

Social Media

1,942 followers

1,214 followers

1,272 followers

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Visitor Attractions

Visitor Attractions

Visitor numbers September 2017/2018

2017	2018	% change
54,615	65,758	+20.4%

Range of performance

44% of Hertfordshire attractions were up this month, ranging from **+19.1%** up to **+44.8%** up, with **67%** of attractions reporting an decrease in footfall.

Attractions up	Attractions down
44%	67%

Performance according to cost September 2017/2018

Charging	Free
26.5%	-7.7%

Performance according to attraction size September 2017/2018

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
-5.9%	n/a	-11.1%	+36.3%

Performance according to attraction location September 2017/2018

Urban	Rural
-9.8%	+22%

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	54,615	65,758	+20.4%	566,176	577,447	+2%
October	-	-	-	-	-	-
November	-	-	-	-	-	-
December	-	-	-	-	-	-
September*	54,615	76,254	+39.6%	566,176	717,519	+26.7%

**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

An increase in the number of events hosted, compared to September 2017.

Strong summer campaigns and good weather, positively impacted visitor footfall.

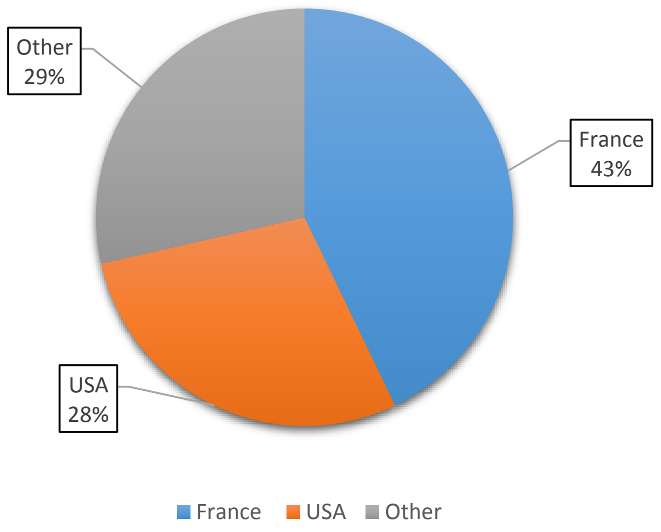
Negative

Decreased opening times compared to the same time last year.

Changes to staffing negatively impacted marketing and planning.

Origin of visitors to attractions

- During September 2018, **96.3%** of visitors to attractions were domestic, **1.3%** long haul and **2.4%** European.
- Out of the overseas visitors, **43%** 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 September 2018

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **80.8%.**
- Hertfordshire accommodation providers experienced a slight increase of **+0.5%** in occupancy levels compared to September 2017.
- Revenue per available room was up **+0.7%**, while average daily rate saw an increase of **+0.2%** compared to September 2017.

Year on year room occupancy comparison (%)

Hertfordshire	September 2017	September 2018	September 17/18
Occupancy	80.4%	80.8%	+0.5%

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%	80.8%	-	-	-

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

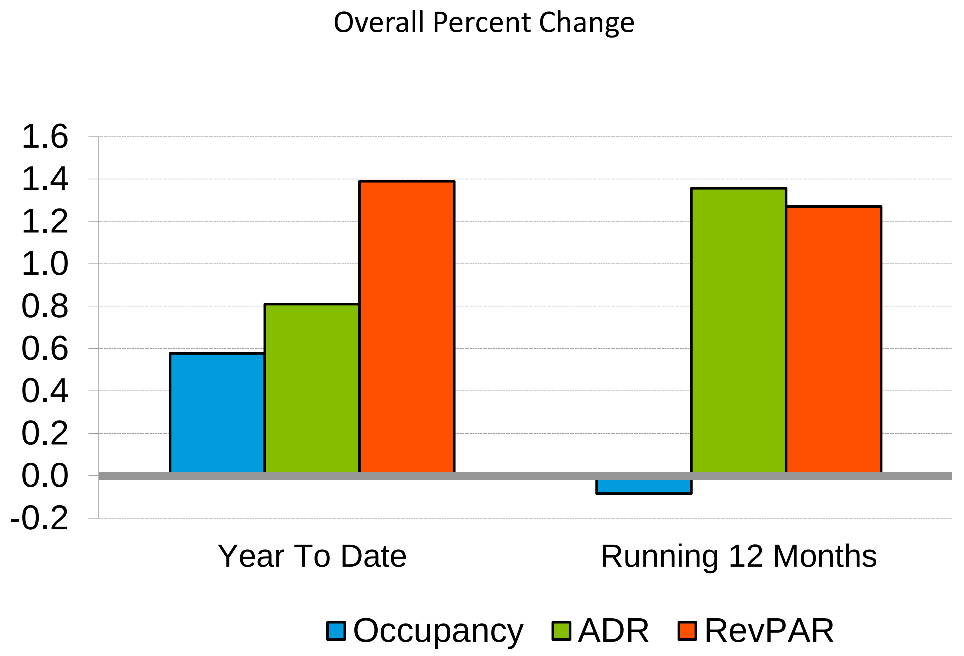
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	September 2017	September 2018	September 17/18
ADR	£72.90	£73.04	+0.2%

Year on year revenue per available room comparison (%)

Hertfordshire	September 2017	September 2018	September 17/18
RevPAR	£58.59	£58.98	+0.7%



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: September 2018 GB & England

Tourism Day Visits Summary

- The three months to September and year to date TDV volume decreased but with a higher spend per visit for both Great Britain and England, meaning that the overall value for both time periods increased compared to 2017
- The volume of day visits in Great Britain in the three months to September 2018 decreased to 459 million, a drop of -8% when compared to the same period last year. The value of these visits increased by +6% to £17.9 billion
- The GB year to date volume of visits has decreased by -5% to 1.3 billion but the value of visits increased by +3% to £47.6 billion when compared to the same period in 2017. Following the GB trend, volume of visits in England decreased by -7% to 385 million in the three months to September, while value increased by +9% to £15.3 billion compared to the same period in 2017
- Year to date the volume of day visits in England has decreased by -5% to 1.1 billion million when compared to 2017. Value however increased by +6% to £39.7 billion compared to the same period

3+ Hour Day Visits Summary

- 3+ hour day visit volume and value for Great Britain and England follows the same trend as TDV and ACT, although the percentage changes are more in keeping with the former.
- In Great Britain volume for the three months to September 2018 has decreased by - 7% to 747 million compared to the same period in 2017 ▯ The value of these visits increased by +2% to £25.0 billion compared to the same period in 2017.Year to date, volume is down by -5% to 2.1 billion but value has increased by +4% to £68.0 billion compared to 2017.
- In England, volume declined by -6% to 627 million in the three months to September 2018. The value of these visits increased by +4%, to £18.8 billion. Year to date the volume of 3+ hour day visits in England has decreased relative to the same period in 2017 by -5% to £1.8 billion while the value increased by +8% to £57.1 billion.

To view the full report click here

VisitEngland Occupancy Survey: August 2018 results

Summary of Results

- Room occupancy in August increased by +2% to 83% whilst bedspace occupancy increased by +3% when compared to August 2017 to 62%. The change in room occupancy was led by an increase in room supply of +1.3% and an increase of +3.7% 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 +5% in August to £77.92 compared to the previous year.
- City/large town room occupancy increased by +3% to 83% whilst bedspace occupancy increased by +2% to 61%. Seaside room occupancy was stable at 89%, whilst bedspace occupancy increased by +1% to 75%.
- Small town room occupancy increased by +1% to 80% and increased by +1% for bedspace occupancy to 61%, with countryside increasing by +3% for room occupancy to 78% and increasing by +2% for bedspace occupancy to 58%. 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, London increased to the greatest extent, by +6% in room occupancy and +4% in bedspace occupancy.
- North West and East Midlands both increased in room occupancy by +3%, and increased in bedspace occupancy by +2% and +3% respectively. All other regions were stable with changes of 1% of less for both room and bedspace occupancy.

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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, September 2018. Thank you.