VISIT HERTS

GO TO PLACES

Hertfordshire Business Barometer

October 2018

Contents

Key Findings

- In October 2018, Hertfordshire attractions experienced a **+7%** increase in visitor footfall, compared to October 2017.
- Factors cited by attractions as having positively impacted visitor footfall included, targeted marketing campaigns and an increase in attendance at events hosted, compared to the same time the previous year.
- Serviced accommodation providers saw a healthy increase in occupancy of **+6.3%** compared to October 2017, while RevPAR also saw a increase of **+8%** compared to October 2017.
- **93%** of visitors to attractions were domestic and **7%** were from overseas. Out of the overseas visitors, **50%** of attractions reported guests from France as being their most prevalent overseas market.
- In October 2018, the Visit Herts website saw an increase in the total number of sessions compared to September 2018. This increase is perhaps due to the additional visits to the website for the Hertfordshire Tourism Awards.

Comparison October 2017/18

Attraction visitor numbers +7%

Serviced

Serviced accommodation- all serviced accommodation occupancy- source: STR Global Ltd +6.3%

Visit Herts Marketing Update

Digital

In October the Visit Herts website had **18,723** users visit the website and **43,896** total pageviews. The Visit Herts social media channels performed well during October. On Twitter we ended the month with **1,994** followers, we sent out **96** tweets throughout the month, and received **60,405** impressions during this period. On Instagram we ended October with **1,345** followers and received **1,438** engagements within this period. On Facebook we ended the month with **1,247** followers/likes, posted **29**, and had **56,094** impressions on these posts.

Travel Trade

In October, work continued on confirming plans for Visit Herts' presence at World Travel Market in November. The team were also able to call out for interest from partners in future shows for 2019, with a good take up from key destinations within the county already confirmed. This month also saw extensive work go into the planning and design of the new 2019 Group Directory for Hertfordshire, contacting partners for content, updates, images and more, ready for the final production and publication in November.

Website

21,303 sessions
1.28 average dwell time
2.06 pages viewed per session

Social Media

1,994 followers

1,247 followers

1,345 followers

Visitor Attractions

Visitor Attractions

Visitor numbers October 2017/2018

2017	2018	% change
57,807	61,830	+7%

Range of performance

43% of Hertfordshire attractions were up this month, ranging from **+14.3%** up to **+16.2%** up, with **57%** of attractions reporting a decrease in footfall.

Attractions up	Attractions down
43%	57%

Performance according to cost October 2017/2018

Charging	Free
+12.1%	-9.6%

Performance according to attraction size October 2017/2018

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
-52.5%	n/a	-4.7%	+15.2%

Performance according to attraction location October 2017/2018

Urban	Rural
-57.2%	+9.3%

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	Up +1.5%
July	69,658	71,451	Up 2.6%	391,479	398,099	Up +1.7%
August	120,082	113,590	Down 5.4%	511,561	511,689	OP
September	54,615	65,758	Up 20.4%	566,176	577,447	Up +2%
October	57,807	61,830	Up 7%	623,983	639,307	Up +2.5%
November	-	-	-	-	-	-
December	-	-	-	-	-	-
October*	57,807	61,830	Up 7%	623,983	779,349	Up +24.9%

**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

Work on more targeted marketing campaigns helped to increase visitor footfall compared to October 2017.

Increased attendance at events hosted compared to the same time the previous year.

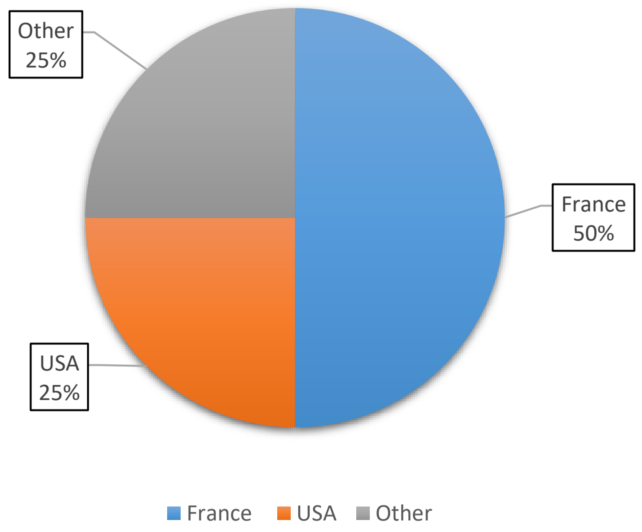
Negative

Less events held this year in comparison to October 2017.

Poor weather negatively impacted visitor footfall.

Origin of visitors to attractions

- During October 2018, **92.8%** of visitors to attractions that completed the Barometer survey were domestic, **2.8%** were long haul and **4.4%** were European.
- Out of the overseas visitors, **50%** 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 October 2018

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **81.7%.**
- Hertfordshire accommodation providers experienced an increase of **+6.3%** in occupancy levels compared to October 2017.
- Revenue per available room was up **+8%**, while average daily rate saw an increase of **+1.6%** compared to October 2017.

Year on year room occupancy comparison (%)

Hertfordshire	October 2017	October 2018	October 17/18
Occupancy	76.8%	81.7%	+6.3%

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%	77.1%
	July 2018	Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018
Occupancy	83.6%	78.2%	80.8%	81.7%	-	-

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

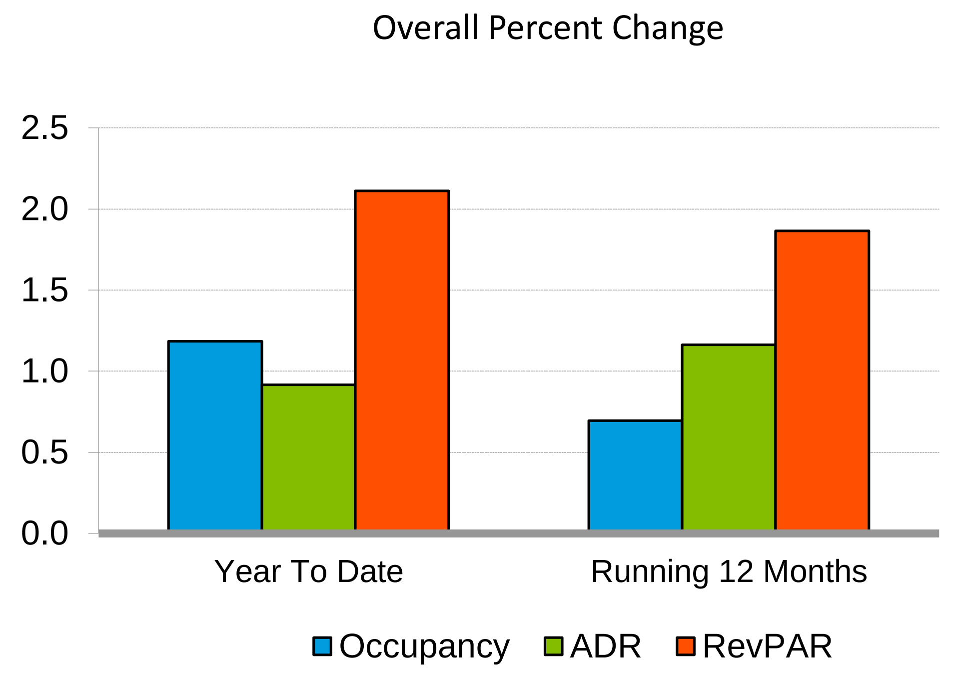
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	October 2017	October 2018	October 17/18
ADR	£71.82	£72.94	+1.6%

Year on year revenue per available room comparison (%)

Hertfordshire	October 2017	October 2018	October 17/18
RevPAR	£55.17	£59.58	+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.

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Other News

Other News

VisitEngland GB Day visits 2018: October 2018 GB & England

Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to October 2018 decreased by -9% when compared with the same period last year, to 449.9 million.
- The value of those visits increased +14% to £18.5 billion.
- At year-to-date level for Great Britain, volume decreased by -5% to 1.4 billion day visits. However, the value of these visits increased by +4% to £53 billion.
- For England, volume decreased by -8% to 374.5 million visits in the three months prior to October 2018, while value increased by +16% to £15.7 billion compared to the same period in 2017.
- Year-to-date day visits in England decreased by -5% to 1.2 billion. However, the value of these visits, increased by +7% to £44.3 billion.

3+ Hour Day Visits Summary

- In the three months to October 2018, 3+hour day visits in Great Britain decreased by -8% compared to the same period in 2017, to 721.2 million visits.
- The value of these visits, however, increased by +12% to £25.5 billion.
- In terms of year-to-date for Great Britain, volume is down by -5% to 2.3 billion while value for these visits is up by +6% at £75.6 billion.
- For England, volume also declined by -8% to 599.4 million in the three months to October 2018, while value increased by +11% to £21.1 billion.
- Year-to-date day visits in England also decreased by -5% to 2 billion. The value of these visits was up +8% to £63.1 billion.

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VisitEngland Occupancy Survey: September 2018 results

VisitEngland

Summary of Results

- Room occupancy in September was stable at 84% whilst bedspace occupancy decreased by -2% to 58% when compared to September 2017. In September there was an increase of +1.6% in room supply and an increase of +1.2% 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, decreased by -1% in September to £84.70 compared to the previous year.
- City/large town room occupancy was stable at 84% whilst bedspace occupancy decreased by -1% to 58%. Seaside room occupancy decreased by -2% to 83%, whilst bispace occupancy decreased by -2% to 60%.
- Small town room occupancy decreased by -1% to 80% and decreased by -1% for bedspace occupancy to 57%, with countryside decreasing by -1% for room occupancy to 76% and decreasing by -1% for bedspace occupancy to 52%.
- Looking at occupancy rates by establishment size, establishments with 1-25 rooms and 26-50 rooms both decreased by -2% in room occupancy and -1% in bedspace occupancy. Establishments with 51-100 rooms and 101+ rooms remained relatively stable with changes of 1% or less for both room and bedspace occupancy.
- Looking at occupancy rates by region, the biggest shifts came from South West and South East, who both decreased by -2% in room occupancy and -2% in bedspace occupancy. All other regions were stable with changes of 1% or 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, October 2018. Thank you.