VISIT HERTS

GO TO PLACES

Hertfordshire Business Barometer

November 2018

Contents

Key Findings

- In November 2018, Hertfordshire attractions experienced a **+23.9%** increase in visitor footfall, compared to November 2017, the largest seen so far this year.

- Factors cited by attractions as having positively impacted visitor footfall included, increased spend on advertising and a larger number of events hosted, compared to the same time the previous year.

- Serviced accommodation providers saw an increase in occupancy of **+2.4%** compared to November 2017, while RevPAR was also up by **+0.6%.**

- **93.8%** of visitors to attractions were domestic and **6.2%** were from overseas. Out of the overseas visitors, **50%** of attractions reported guests from France as being their most prevalent overseas market.

Comparison November 2017/18

Attraction visitor numbers +23.9%

Serviced

Serviced accommodation- all serviced accommodation occupancy- source: STR Global Ltd +2.4%

Visit Herts Marketing Update

Digital

In November 2018, the Visit Herts website had **13,382** users visit the website and **30,042** total pageviews. The Visit Herts social media channels performed well during November. On Twitter we ended the month with **2,026** followers, we sent out **96** tweets throughout the month, and received **56,691** impressions during this period. On Instagram, we ended November with **1,384** followers and received **1,299** engagements within this period. On Facebook we ended the month with **1,255** followers/likes, posted **37**, and had **21,733** impressions on these posts.

Travel Trade

Visit Herts had a presence at World Travel Market in London, one of the biggest B2B travel events in the world. The team met with several operators during the show, as well as attending the gala dinner to further network with buyers. Feedback from operators was one of uncertainty with the approach of Brexit, however many major operators were not reporting drops in bookings. 2019 brochures are already completed, and for those operators working in long-haul markets, they are already looking at tours for 2021.

Website

14,960 sessions
1.17 average dwell time
2.01 pages viewed per session

Social Media

2,026 followers

1,255 followers

1,384 followers

Visitor Attractions

Visitor Attractions

Visitor numbers November 2017/2018

2017	2018	% change
19,275	23,875	Up 23.9%

Range of performance

50% of Hertfordshire attractions were up this month, ranging from **+12.4%** up to **+16.2%** up, with **50%** of attractions reporting a decrease in footfall.

Attractions up	Attractions down
50%	50%

Performance according to cost November 2017/2018

Charging	Free
Up 39.3%	Up 7.7%

Performance according to attraction size November 2017/2018

20,000 or less	20,001- 50,000	50,001 -200,000	Over 200,000
Down 5.3%	Down 1.7%	Up 12.4%	Up 51.5%

Performance according to attraction location November 2017/2018

Urban	Rural
Down 5.3%	Up 27.4%

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	19,275	23,875	Up 23.9%	643,258	663,182	Up 3.1%
December	-	-	-	-	-	-
November*	19,275	23,875	Up 23.9%	643,258	779,349	Up 21.2%

**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

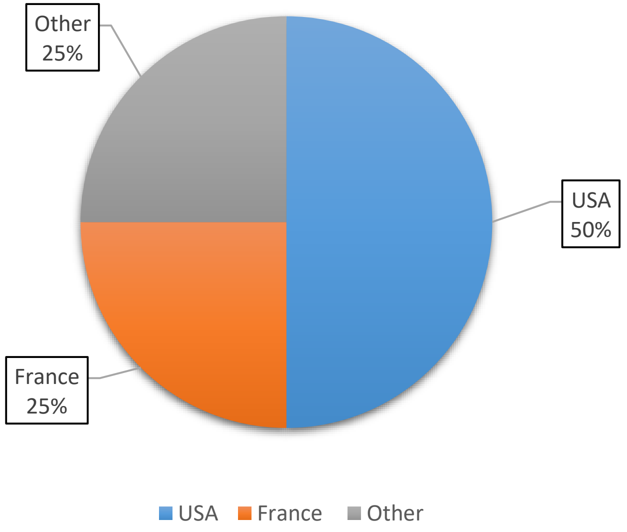
- Increased spend on advertising.
- Larger number of events took place in comparison to November 2017.

Negative

- Reduced opening times cited as having negatively impacted visitor footfall in comparison to November 2017.
- Due to changes in staffing events and activities have been restructured.

Origin of visitors to attractions

- During November 2018, on average **93.8%** of visitors to attractions that completed the Barometer survey were domestic, **2.4%** were long haul and **3.8%** were European.
- Out of all the overseas visitors, **50%** of attractions reported guests from the USA as being their most prevalent market.



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

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **76.6%.**
- Hertfordshire accommodation providers experienced an increase of **+2.4%** in occupancy levels compared to November 2017.
- Revenue per available room was up **+0.6%**, while the average daily rate saw an increase of **+1.6%** compared to November 2017.

Year on year room occupancy comparison (%)

Hertfordshire	November 2017	November 2018	November 17/18
Occupancy	74.8%	76.6%	Up 2.4%

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%	76.6%	-

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

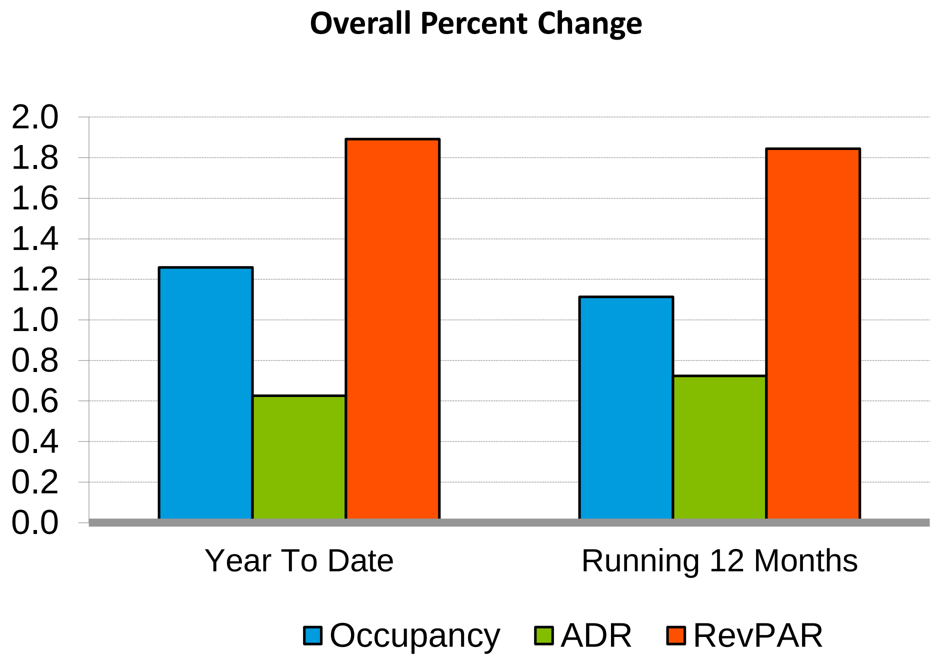
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	November 2017	November 2018	November 17/18
ADR	£71.77	£70.51	Down 1.7%

Year on year revenue per available room comparison (%)

Hertfordshire	November 2017	November 2018	November 17/18
RevPAR	£53.70	£54.02	Up 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: November 2018 GB & England

Tourism Day Visits Summary

- The volume of day visits in Great Britain (GB) in the three months to November 2018 decreased by -8% to 407 million when compared with the same period last year. By contrast, the value of these visits increased by +8% to £17.4 billion.
- GB year-to-date volume decreased by -6% to 1.55 billion. However, the value increased by +3% to £58.2 billion.
- In the three months to November 2018, the volume of visits in England decreased by -11% to 336 million, while the value of these visits increased by +7% to £14.6 billion.
- Year-to-date volume of visits in England also decreased by -6% to 1.3 billion yet the value of these visits increased by +5% to £48.6 billion compared to the same period in 2017.

3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to November 2018 decreased by -5%, compared to the same period in 2017, to 677 million visits
- The value of these visits increased by +10% for the three months prior to the same period last year to £24.2 billion.
- Year-to-date, volume is down by -5% to 2.6 billion visits but value increased by +5% to £83.2 billion
- In England, volume declined by -7% in the three months prior to November 2018 to 559 million visits. The value of these visits increased, by +7%, to £20.1 billion
- Year-to-date the volume of day visits in England decreased relative to the same period in 2017 by -5% to 2.1 billion. However, the value increased by +7% to £69.6 billion

To view the full report click here

VisitEngland Occupancy Survey: November 2018 results

Summary of Results

- Room occupancy in November increased by +1% to 79% whilst bedspace occupancy increased by +2% to 55% when compared to November 2017. In November there was an increase of +2.0% in room supply and an increase of +3.2% 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, increased by +3% in November to £77.26 compared to the previous year.
- City/large town room occupancy increased by +1% to 81% whilst bedspace occupancy increased by +1% to 55%. Seaside room occupancy increased by +2% to 71%, whilst bedspace occupancy increased by +2% to 52%. Small town room occupancy increased by +1% to 71% and increased by +1% for bedspace occupancy to 51%, whilst countryside room occupancy increased by +1% to 62% and bedspace occupancy increased by +1% to 42%.
- Looking at occupancy rates by establishment size, establishments with 101+ rooms were the only type to increase in both room and bedspace occupancy levels, increasing by +1% for both measures.
- Looking at occupancy rates by region, the biggest shift came from Greater London, who increased by +3% in room occupancy and +2% in bedspace occupancy. East Midlands saw the next greatest increase in room occupancy levels, increasing by +2%, and the region also rose by +1% in bedspace occupancy compared to November 2017.

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, November 2018. Thank you.