



# **VISIT HERTS**

## **BUSINESS BAROMETER**

December 2018



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*Credit: Nigel Moore*



*Credit: Chris Orange*







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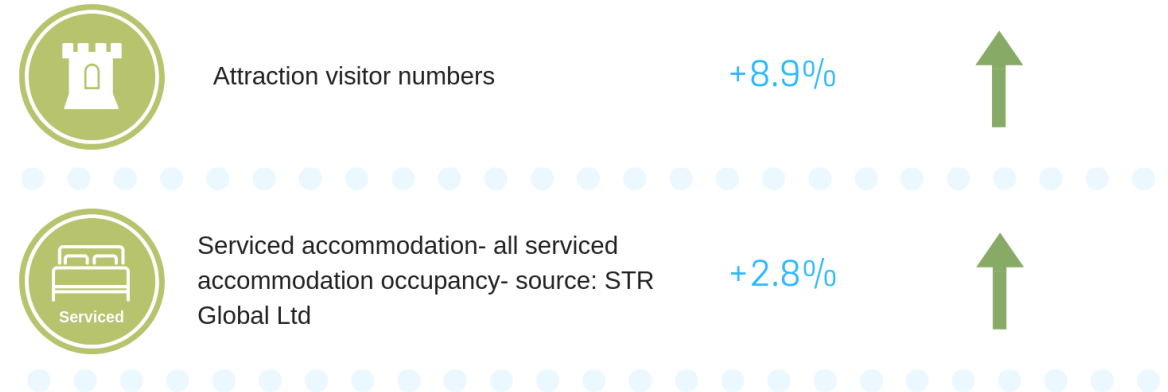


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# Key Findings

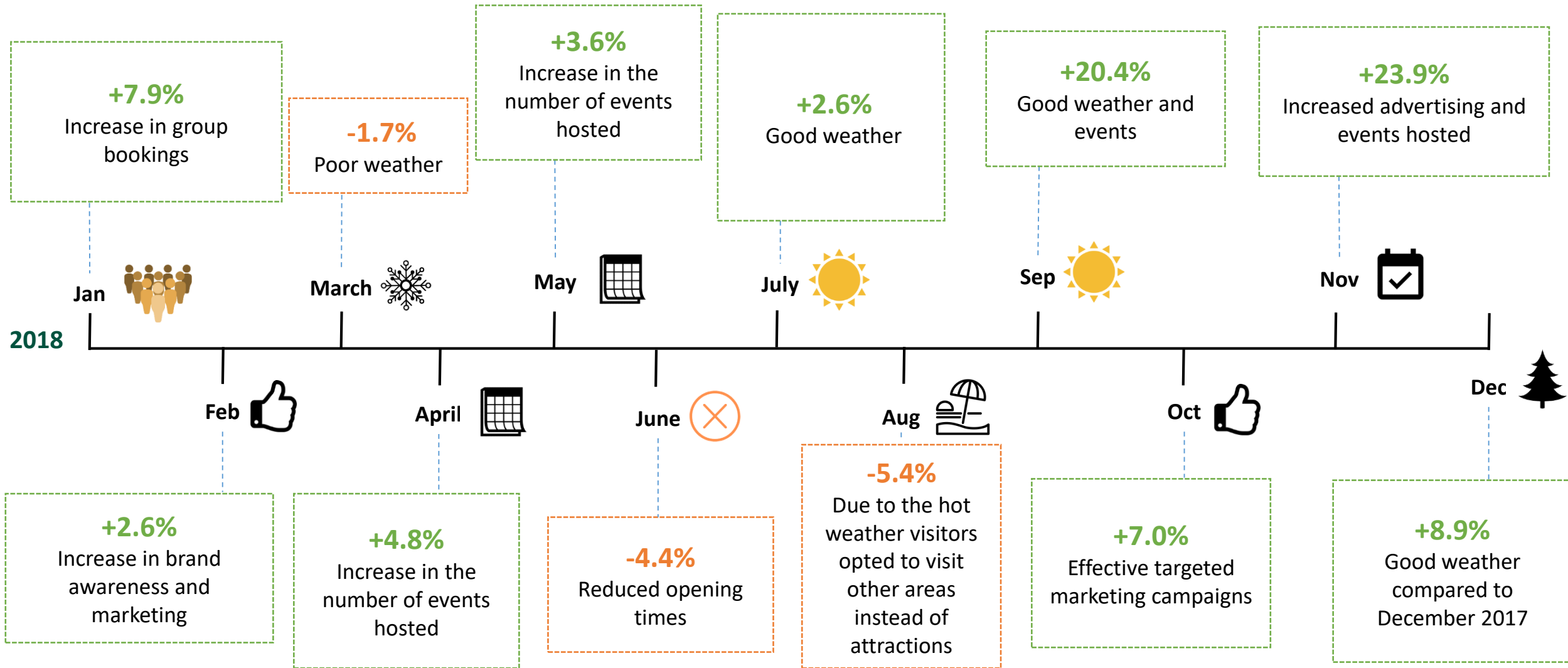
- In December 2018, Hertfordshire attractions experienced a **+8.9%** increase in visitor footfall, compared to December 2017.
- Factors cited by attractions as having positively impacted visitor footfall included good weather and improvements made to facilities.
- Serviced accommodation providers saw an increase in occupancy of **+2.8%** compared to December 2017, while RevPAR was also up by **+4.5%**.
- **97.6%** of visitors to attractions were domestic and **2.4%** were from overseas. Out of the overseas visitors, **60%** of attractions reported guests from 'other' countries, such as Australia and Canada as being their most prevalent overseas markets.

## Comparison December 2017/18





## Monthly performance: Visitor Attractions



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\*Please note: These figures and factors are taken from the 2018 monthly reports.



# Visit Herts Team Update: Digital statistics 2018

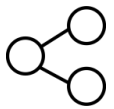


## Website

**140,207** sessions

**356,084** pages views

**1.08** average dwell time



## Social Media



**2,040** followers

**+46%**



**1,305** followers

**+44%**

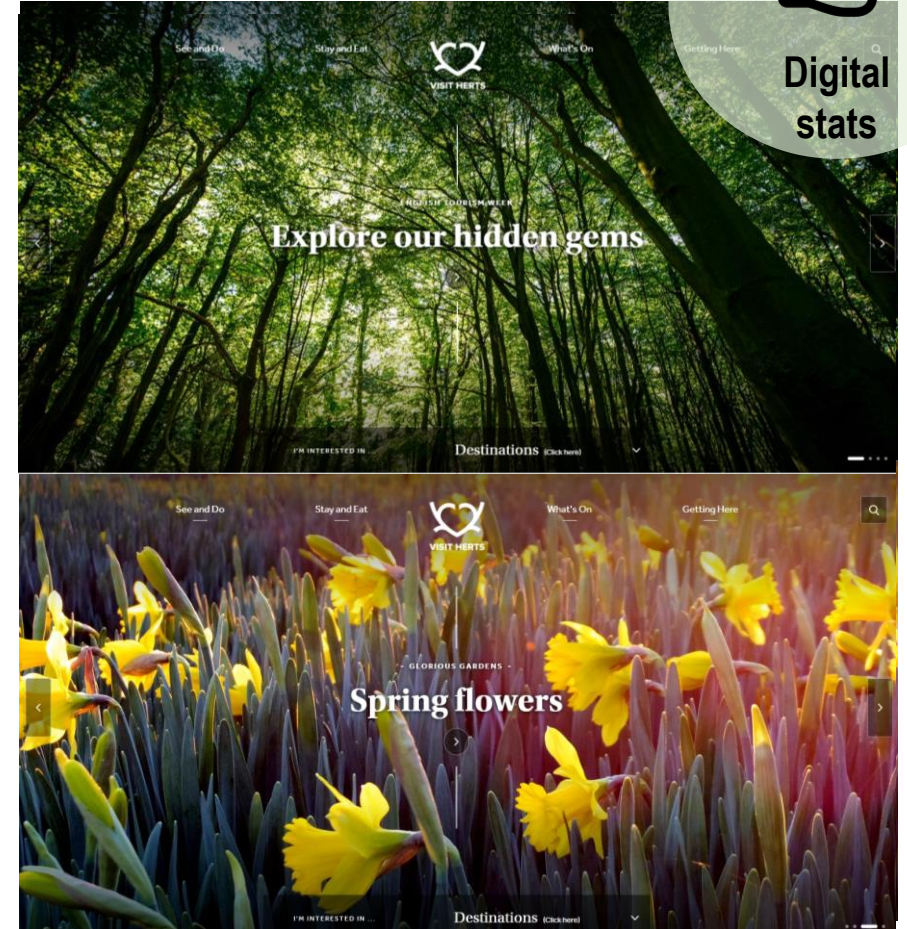


**1,428** followers

**+124%**



**Digital  
stats**



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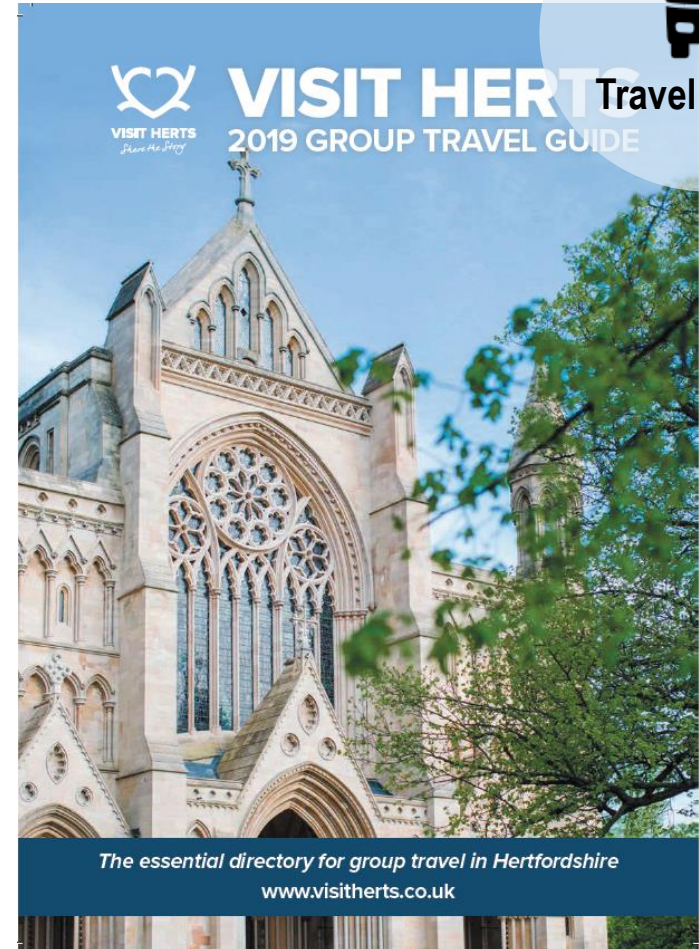


## Visit Herts Team Update: Travel Trade 2018

- Whilst most partners reported 2018 as a very successful year on numbers from the travel trade, certain markets began to shift in the build up to Brexit and as a result of the growth of terrorism. International student travellers via travel trade became less willing to travel due to safety, whilst VisitBritain reported that the perception of Britain began to show signs of dropping in the international rankings. International long-haul markets have grown considerably this year, with visitors from as far as China and South America being more willing to travel outside of London to experience new products.
- The is partly helped by the continued work on the Discover England Fund projects which aim to position destinations and products outside of London as more accessible to international visitors. We are thrilled that our destination continues to be featured in several of these projects.
- The travel trade continues to seek out bespoke, memorable experiences as part of itineraries, rather than standard visits and guided tours. They are looking for ways to enhance the visitor experience. With the rise of social media and the online presence of holidays and leisure, the more bespoke and exclusive experiences are selling well.
- In 2018, the team attended **15** trade shows across Europe and North America and our team are now looking to develop a brand new travel trade strategy for 2019-2020 with an even more enhanced and proactive approach towards trade which will shortly be shared with partners.



Travel Trade



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## Visit Herts Team Update: December 2018



### Digital

In December 2018, the Visit Herts website had **14,946** users visit the website and **41,814** total page views while the Visit Herts social media channels performed well during December too. On Twitter, we ended the month with **2,040** followers, we sent out **83** tweets throughout the month, and received **57,557** impressions during this period. On Instagram, we ended December with **1,428** followers and received **1,637** engagements within this period. On Facebook we ended the month with **1,305** followers/likes, posted **41**, and had **35,958** impressions on these posts.



### Travel Trade

In December 2018, the team were busy working on the new 2019 Herts Group Travel Directory which lists the group benefits and facilities at all major attractions and partners in the county. This will be printed in January and will be distributed at all shows, meetings and appointments throughout the year that we attend. Further time was spent confirming final details for the Visit Herts stand at Excursions (January 2019), the popular group travel organiser show at Alexandra Palace. Work was also carried out on updating the travel trade database of contacts for future mailings.

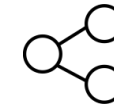


### Website

**22,037** sessions

**1.06** average dwell time

**1.9** pages viewed per session



### Social Media



**2,040** followers



**1,305** followers



**1,428** followers



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# National context

- This section of the report will aim to look at the key national level trends for 2018 from both VisitEngland and VisitBritain. It should also be noted that at the time of writing this report, the following data is the most recent data available and some of the totals for 2018 may be provisional.

## Domestic visitors

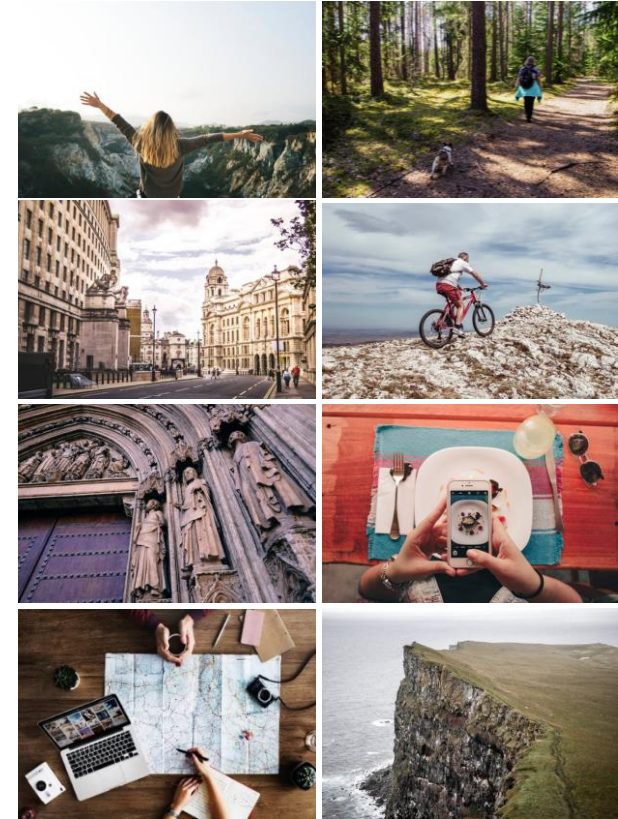
- Looking at the volume of domestic day trips to England in 2018, the latest results show that visits decreased by **-5%** to **1.4 billion** compared to 2017. However, although the volume of day visits saw a reduction, the value of these visits increased by **+4.0%** to **£53.0 billion** compared to 2017.<sup>1</sup> Looking at domestic overnight trips to England, year to November the number of holiday trips saw a **-4.0%** decrease versus the period the previous year.<sup>3</sup>

## Inbound visitors

- With regards to figures for inbound visitors to the UK provisional figures for 2018 show that overall the volume of inbound trips to were down **-4%** compared to 2017 as a whole and spend saw a **-7%** decrease.<sup>7</sup>

## Attractions performance and optimism

- To establish the performance of attractions in particular, the following findings are taken from VisitEngland's Tourism Business Monitor which is designed to monitor the performance and confidence of tourism businesses and the factors which influence them.<sup>2</sup>
- In 2018, **56%** of visitor attractions experienced an increase in footfall, with **27%** seeing a reduction and **17%** remained the same.<sup>2</sup>
- Furthermore, looking at factors that may have influenced performance, the uncertainty surrounding **Brexit and exchange rates** were raised by attractions. Alongside this, the **very hot and poor weather** was cited as a factor to have negatively impacted visitor footfall.<sup>4</sup>
- However, overall the summer weather did have a positive impact of business performance, with **39%** of attractions reporting an increase for this period. However, it should also be noted that during the same time, **28%** reported a decrease in visitor footfall due to high temperatures.<sup>5</sup>





# National context

## Accommodation

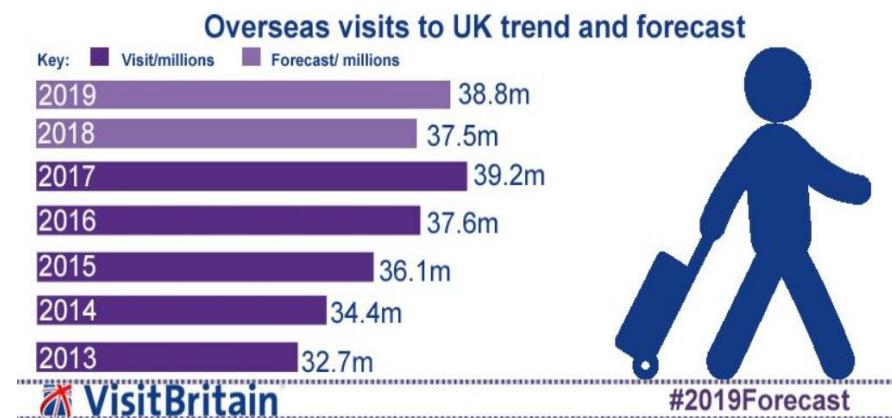
- According to the VisitEngland England Occupancy Survey (December 2018), December year to date room occupancy saw an average of **78%** occupancy in 2018 and a **+1%** increase compared to figures seen in 2017. In addition, supply saw a **+2.2%** increase and demand a **+4.8%** increase compared to 2017. <sup>1</sup>
- Among domestic visitors overnight trips to hotels saw the largest net increase, closely followed by caravan/camping in 2018 as a whole compared to 2017. <sup>4</sup>

## Business optimism for 2019

- The outlook among accommodation providers remain positive, with bookings for summer 2019 appearing stable, with **58%** reporting the same booking levels as in 2018. However, although the latter remains positive, just under a quarter are reporting fewer bookings than in 2018 and overall there is currently a net decline in bookings. <sup>4</sup>
- With regards to business optimism for 2019, **53%** of attractions stated they expect their performance to be better than in 2018, with only **8%** expecting a decline. Although this presents a positive outlook, optimism is at a slightly lower level than seen in previous January waves. <sup>4</sup>

## 2019 inbound forecast

- Finally looking at a forecast for the coming year, VisitBritain's 2019 inbound forecast predicts an increase of **+3.3%** in overseas visitors and a **+7.8%** increase in spend to **£24.9bn**. <sup>6</sup>
- The forecast also highlights that in the first seven weeks of 2019, weak flight bookings from Europe have been observed, with flight bookings to the UK made through direct channels during this period being significantly down year-on-year. However, bookings from long-haul markets are in line with those seen a year earlier, but European bookings were down especially for arrival after March 29th. <sup>6</sup>
- The forecast also highlights that overall Brexit remains a key uncertainty for 2019, as currently there is little clarity on a settlement and the forecast assumes there will be no major travel disruptions. The ongoing value of the pound also remains an uncertainty, and is currently lower than its pre-referendum value and is forecast to be weak throughout the medium term. <sup>6</sup>







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# Visitor Attractions







# Visitor Attractions

## Visitor numbers December 2017/2018

2017	2018	% change
18,284	19,905	+8.9%

## Performance according to cost December 2017/2018

Charging	Free
Up +23.9%	-6.1%



## Performance according to attraction location December 2017/2018

Urban	Rural
Down -17.4%	Up +10.7%



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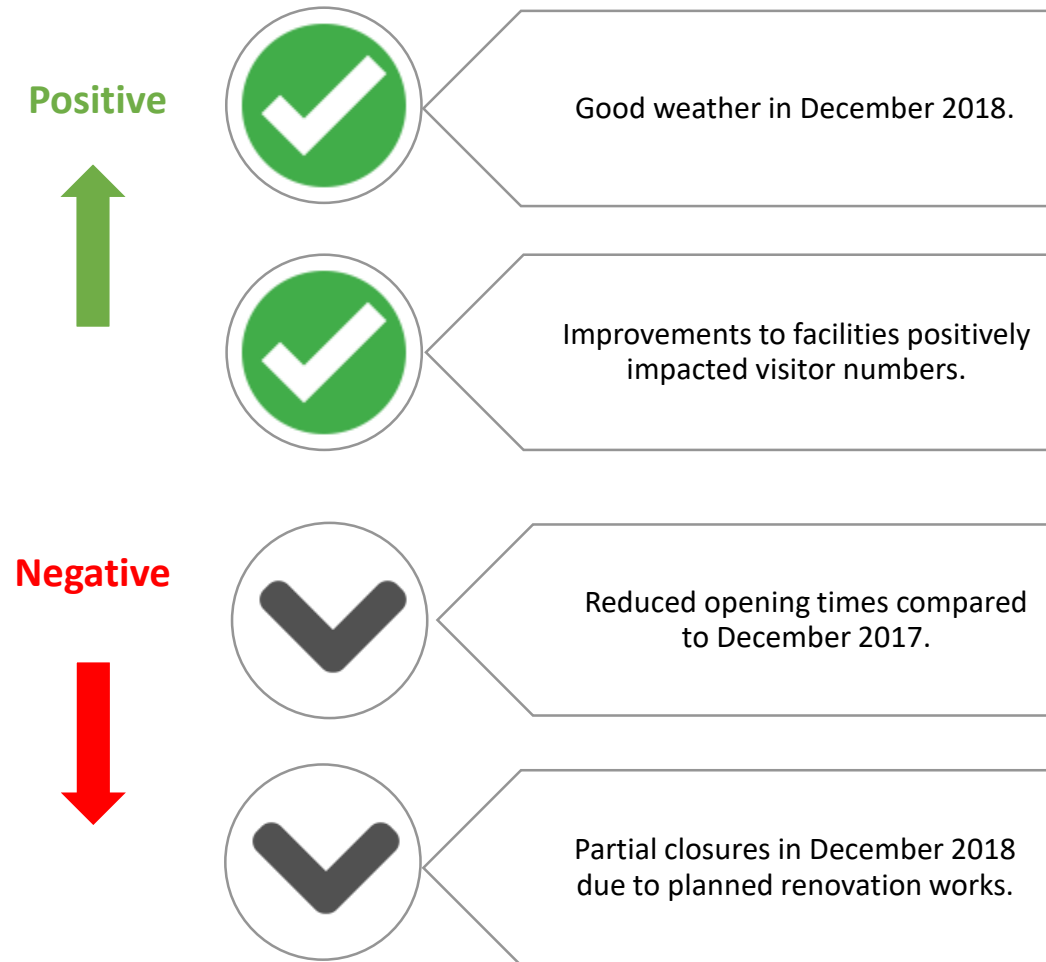


## Visitor numbers for the year to date (YTD)

Month	2017	2018	% change for month	YTD Totals 2017	YTD Totals 2018	% change for YTD
January	24,139	26,057	+7.9%	24,139	26,057	+7.9%
February	37,824	38,797	+2.6%	61,963	64,854	+4.6%
March	68,424	67,281	-1.7%	130,387	132,135	+1.3%
April	98,566	103,326	+4.8%	228,953	235,461	+2.8%
May	30,611	31,699	+3.6%	259,564	267,160	+3.0%
June	62,257	59,488	-4.4%	321,821	326,648	+1.5%
July	69,658	71,451	+2.6%	391,479	398,099	+1.7%
August	120,082	113,590	-5.4%	511,561	511,689	OP
September	54,615	65,758	+20.4%	566,176	577,447	+2%
October	57,807	61,830	+7.0%	623,983	639,307	+2.5%
November	19,275	23,875	+23.9%	643,258	663,182	+3.1%
December	18,284	19,905	+8.9%	661,542	683,087	+3.3%
December*	18,284	19,947	+9.1%	661,542	683,129	+3.3%

*\*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



## Origin of visitors to attractions

- During December 2018, on average **97.6%** of visitors to attractions that completed the Barometer survey were domestic, **0.4%** were long haul and **2%** were European.
- Out of all the overseas visitors, **60%** of attractions reported guests from the 'other' countries such as Australia and Canada as being their most prevalent markets.

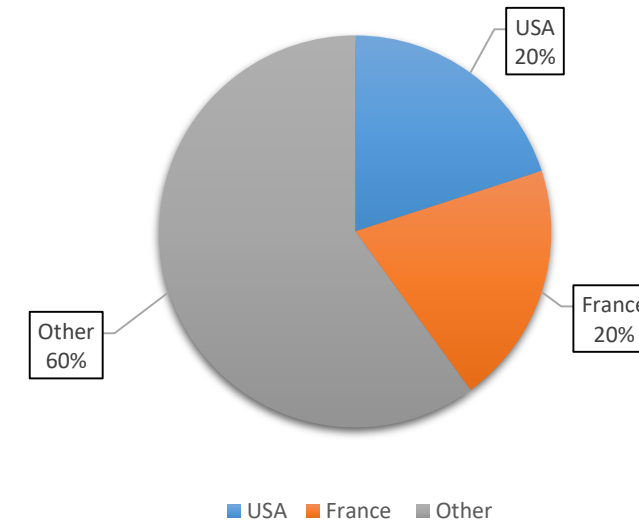


Figure 1: Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in December 2018



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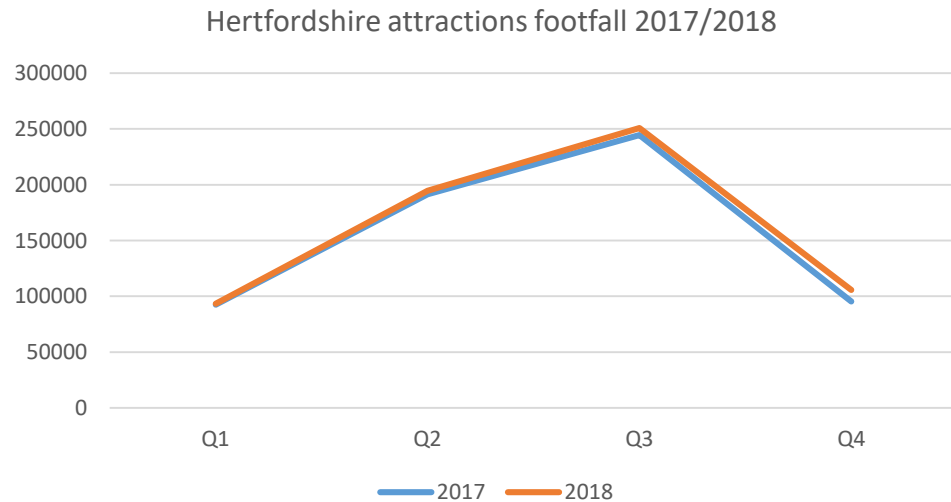
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# Visitor Attractions: Annual Performance

## 2017/2018

- Looking at 2018 as a whole, December YTD Hertfordshire attractions saw a **+3.3%** increase in visitor footfall compared to 2017. In terms of quarterly performance each quarter performed well, particularly in the fourth quarter, with visitor attractions seeing a **+10.7%** increase compared to same quarter in 2017.
- Q1 and Q2 saw a similar performance compared the same quarters the previous year and as seen in figure 2 below, although Q4 saw the largest increase, Q3 saw the highest visitor footfall. It should also be noted that for the annual round-up, there is a variation in sample, month to month.



- In terms of the influencing factors, attractions cited the following as having positively impacted performance - targeted marketing campaigns and increased advertising, good weather, successful summer campaigns and an increase in attendance at events.
- When comparing these findings to the provisional national level data, Hertfordshire's visitor attractions performed well (**+3.3%**), being above the national figures for both domestic day trips (**-5%**) and inbound visitors (**-4%**).



Figure 2: Graph showing the quarterly performance of visitor attractions in Hertfordshire 2017/2018



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# Serviced Accommodation







# Serviced Accommodation: December 2018

- According to figures from STR Global for **63** larger and chain hotels, accommodation providers experienced an average occupancy of **71.1%** in December 2018.
- Hertfordshire accommodation providers experienced an increase of **+2.8%** in occupancy levels compared to December 2017.
- Revenue per available room was up **+4.5%**, while the average daily rate saw an increase of **+1.7%** compared to December 2017.

## Year on year room occupancy comparison (%)

Hertfordshire	December 2017	December 2018	December 17/18
Occupancy	69.2%	71.1%	+2.8%

## 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%	71.1%



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



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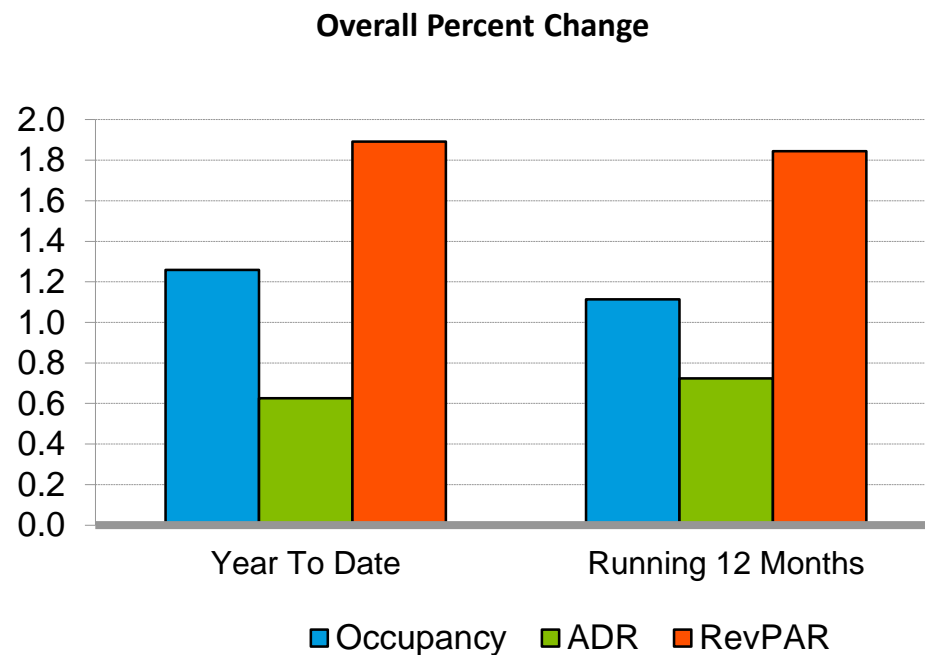
# Serviced Accommodation: December 2018

## Year on year average daily rate comparison (%)

Hertfordshire	December 2017	December 2018	December 17/18
ADR	£64.11	£65.21	+1.7%

## Year on year revenue per available room comparison (%)

Hertfordshire	December 2017	December 2018	December 17/18
RevPAR	£44.35	£46.36	+4.5%



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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# Serviced Accommodation: Annual performance

- According to figures from STR Global, for **63** larger and chain hotels in 2018 as a whole, Hertfordshire accommodation providers experienced an average occupancy of **75.4%**, experiencing a slight **increase of +1.4%**, compared to figures seen in 2017.
- The highest increase in occupancy was observed in August and October, with providers seeing an increase of **+6.0%** in occupancy levels in October compared to October 2017.

## Year on year room occupancy comparison (%)

Hertfordshire	2017	2018	17/18
Occupancy	74.5%	75.4%	+1.4%

## This year ... so far (%)

Hertfordshire	Jan 2018	Feb 2018	Mar 2018	Apr 2018	May 2018	June 2018
Occupancy	64.2%	71.4%	71.2%	72.7%	76.0%	77.4%
	July 2018	Aug 2018	Sep 2018	Oct 2018	Nov 2018	Dec 2018
Occupancy	83.3%	78.0%	80.8%	81.4%	76.6%	71.1%

Serviced Accommodation occupancy (2017 vs. 2018)

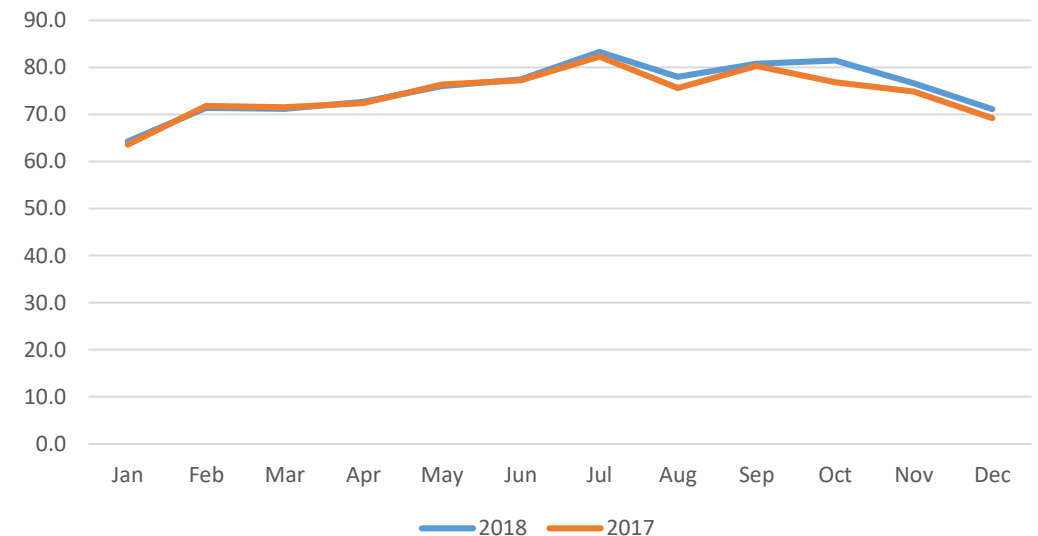


Figure 3. Graph showing the occupancy of serviced accommodation providers in Hertfordshire in 2018 vs.2017





# Serviced Accommodation: Annual performance

- In 2018, average daily rate saw a **+0.7%** increase, compared to figures recorded in 2017, while revenue per available room saw an increase of **+2.1%** compared to 2017.
- Looking at the supply and demand for serviced accommodation providers in Hertfordshire, 2018 saw an monthly average supply of **3,043,210**, a slight decrease of **-0.1%** compared to 2017.
- The level of demand for serviced accommodation in Hertfordshire registered an increase of **+1.3%**, when compared to 2017.

## Year on year average daily rate comparison (%)

Hertfordshire	2017	2018	17/18
ADR	£69.09	£69.59	+0.7%

## Year on year revenue per available room comparison (%)

Hertfordshire	2017	2018	17/18
RevPAR	£51.35	£52.45	+2.1%

## Average monthly supply comparison (%)

Hertfordshire	2017	2018	17/18
Supply	3,045,687	3,043,210	-0.1%

## Average monthly demand comparison (%)

Hertfordshire	2017	2018	17/18
Demand	2,263,478	2,293,346	+1.3%





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## Other News





## VisitEngland GB Day visits 2018: December 2018 GB & England

### Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to December 2018 decreased by -5% to 417 million when compared with the same period last year
- The value of those visits remained static at £16.2 billion. For the calendar year, GB level volume also decreased by -5% to 1.7 billion in 2018 but the value of visits increased by +2% to £63.8 billion
- Looking at England, volume decreased by -6% to 351 million visits in the three months to December 2018, but value was static at £13.3 billion compared to 2017
- The calendar year volume of day visits in England decreased by -5% to 1.4 billion in 2018. Value however increased by +4% to £53.0 billion compared to 2017

### 3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to December 2018 decreased by -6% to 677 million compared to the same period in 2017. The value of these visits increased by +2% £23.1 billion
- For the calendar year, volume is down by -5% to 2.8 billion visits but value increased by +4% to £91.2 billion in 2018
- In England, volume decreased by -7% to 563 million in the three months to December 2018. The value of these visits decreased, by -3%, to £18.5 billion
- For the calendar year, volume of day visits in England decreased by -5% to 2.3 billion in 2018 but value increased by +5% to £75.6 billion compared to 2017

To view the full report click [here](#)

## VisitEngland Occupancy Survey: December 2018 results

### Summary of Results

- Room occupancy in December increased by +3% to 72% whilst bedspace occupancy increased by +1% to 52% when compared to December 2017. In December there was an increase of +2.2% in room supply and an increase of +4.8% 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 +7% in December to £69.85 compared to the previous year. City/large town room occupancy increased by +3% to 74% whilst bedspace occupancy remained unchanged at 53%.
- Seaside room occupancy increased by +4% to 67%, whilst bedspace occupancy increased by +2% to 52%. Small town room occupancy increased by +2% to 64% whilst bedspace occupancy remained unchanged at 47%. Countryside room occupancy increased by +4% to 58% and bedspace occupancy increased by +1% to 41%.
- Looking at occupancy rates by establishment size, establishments with 1-25 rooms showed greatest percentage increase in room occupancy, increasing by of +5% to 67% compared to the same period last year and increasing bedspace occupancy by +2% to 50%. Establishments with 101+ rooms showed increase of +3% to 73% in room occupancy and bedspace occupancy increased by +1% to 53%.
- Looking at occupancy rates by region, the biggest shift came from Greater London, who increased by +5% in room occupancy and +2% in bedspace occupancy. East Midlands saw the next greatest increases, increasing by +5% for room occupancy, and increasing by +1% for bedspace occupancy compared to December 2017.

To view the full report click [here](#)

## Research sources

This section provides information and links to other key and research resources from both Visit Herts and external organisations.

### Cambridge Economic Impact study

The Cambridge Economic Impact Model is an industry respected tool for measuring the economic impact of tourism in a given area. Knowing the volume and value of tourism is an essential part of developing policies for managing tourism. The most recent reports based on 2017 figures are now available on our website [here](#)

### Latest England research reports

VisitEngland's latest trends dashboard presents the latest results from surveys and research findings and is updated on a monthly basis with annual results from key reports. Key statistics include, domestic day visits, domestic overnights visits and latest inbound visitor statistics. This can be accessed [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



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# References

<sup>1</sup> [VisitEngland \(2018\) GB Day Visits 2018 December 2018 GB & England](#)

<sup>2</sup> [VisitEngland \(2018\) England Occupancy Survey December 2018 Results](#)

<sup>3</sup> [VisitEngland \(2019\) Latest England Research reports: Latest Trends dashboard](#)

<sup>4</sup> [VisitEngland \(2018\) Tourism Business Monitor 2018 Wave 3 – Post Christmas Full report](#)

<sup>5</sup> [VisitEngland \(2018\) Tourism Business Monitor 2018 Wave 2 – Post summer holidays Full report](#)

<sup>6</sup> [VisitBritain \(2019\) 2019 inbound tourism forecast](#)

<sup>7</sup> [VisitBritain \(2019\) Monthly Inbound Update December 2018](#)

### **Business Barometer Contacts**

If you would like to be part of the Business Barometer, or have any questions on its content, please contact

**Ruby Berkeley-Corner**- [ruby.berkeley-corner@visitherts.co.uk](mailto:ruby.berkeley-corner@visitherts.co.uk)

### **Previous reports**

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### **Acknowledgements**

If you wish to use any figures or information contained within this report, please acknowledge the source as Visit Herts Business Barometer, December 2018. Thank you.



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