



VISIT HERTS

BUSINESS BAROMETER

February 2019



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Credit: Nigel Moore



Credit: Chris Orange





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Key Findings

- In February 2019, Hertfordshire attractions experienced a **+21.0%** increase in visitor footfall, compared to February 2018.
- Factors cited by attractions as having positively impacted visitor footfall included, better weather conditions compared to February 2018 and increased marketing and advertising.
- Serviced accommodation providers saw an increase in room occupancy of **+1.2%** compared to February 2018.
- **93%** of visitors to attractions were domestic and **7%** were from overseas. Out of the overseas visitors, **50%** of attractions reported guests from the USA as being their most prevalent market, alongside **25%** of attractions reporting visitors from France and **25%** reporting visitors from 'other' countries as their most prevalent market.

Hertfordshire's visitor economy performance

Visit Herts Business Barometer

February 2019

In February 2019, tourism businesses saw...

Visitor Attraction footfall



February 2018-2019 **+21.0%**



Serviced Accommodation

February 2018-2019

+1.2%

Occupancy



-1.4%

REVPAR



-2.5%

ADR



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Visit Herts Team Update: Digital statistics

February 2019 Stats

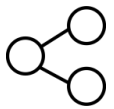


Website

12,902 sessions

23,705 pages views

1.32 average dwell time



Social Media



2,111 followers



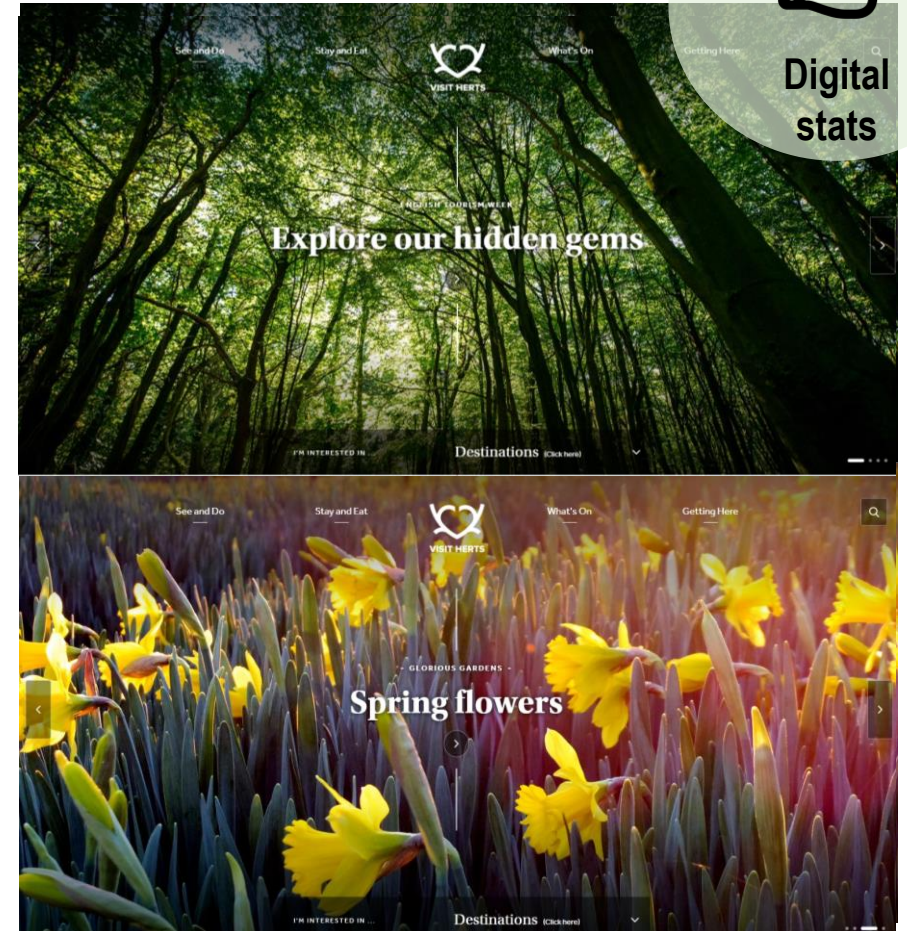
1,360 followers



1,530 followers



Digital
stats



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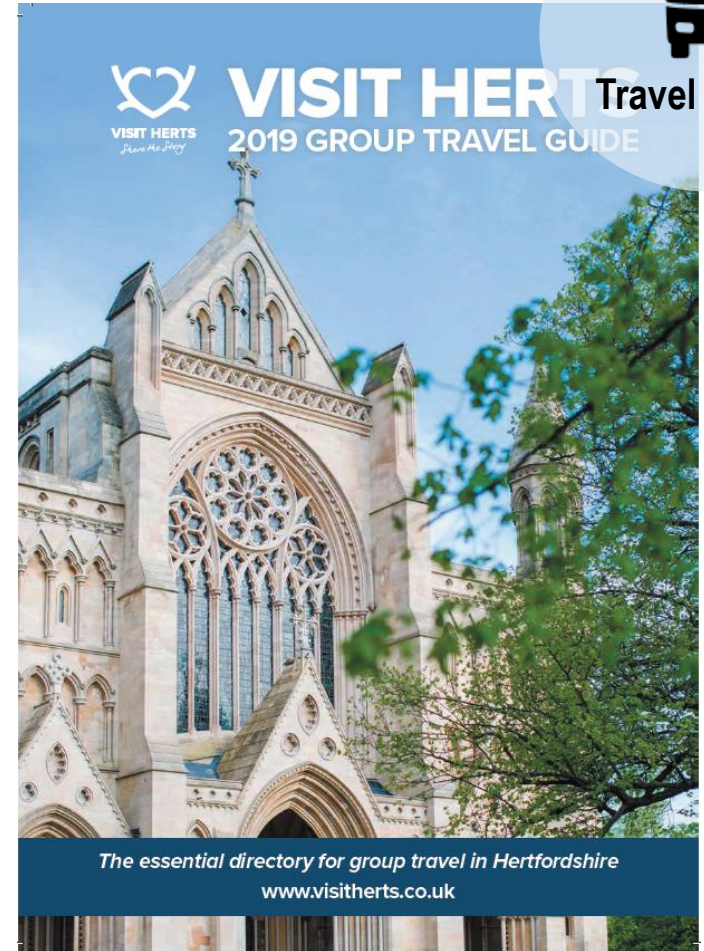


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Visit Herts Team Update: Travel Trade

- In the peak of the trade show season, Hertfordshire had a destination presence at both the UKinbound annual convention in Glasgow, and the Coach Tourism Association (CTA) annual conference in Cambridge.
- Both events saw **121** meetings with operators and coach companies to discuss latest news and developments in the region, along with key events, with 2020 already being sold at trade events.
- This month also saw a large amount of trade activity take place for the Gourmet Garden Trails project, with dedicated sales missions in partnership with Abbey Ireland and UK to the Netherlands and Germany to meet with tour operator clients to pitch the project and bookable experiences.
- We also held a dedicated trade working group meeting in Herts to catch up with partners on key plans for 2019 and 2020.



Travel Trade



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Visitor Attractions





Visitor Attractions

Visitor numbers February 2018/2019

2018	2019	% change
33,633	40,705	+21.0%

Range of performance February 2018/2019

60% of Hertfordshire attractions were up this month, ranging from +8.3% up to +78.1% up, with 40% of attractions reporting a decrease in footfall.

Attractions up	Attractions down
60%	40%

Performance according to cost February 2018/2019

Charging	Free
+73.3%	-18.2%

Performance according to attraction location February 2018/2019

Urban 	Rural 
-7.2%	+21%



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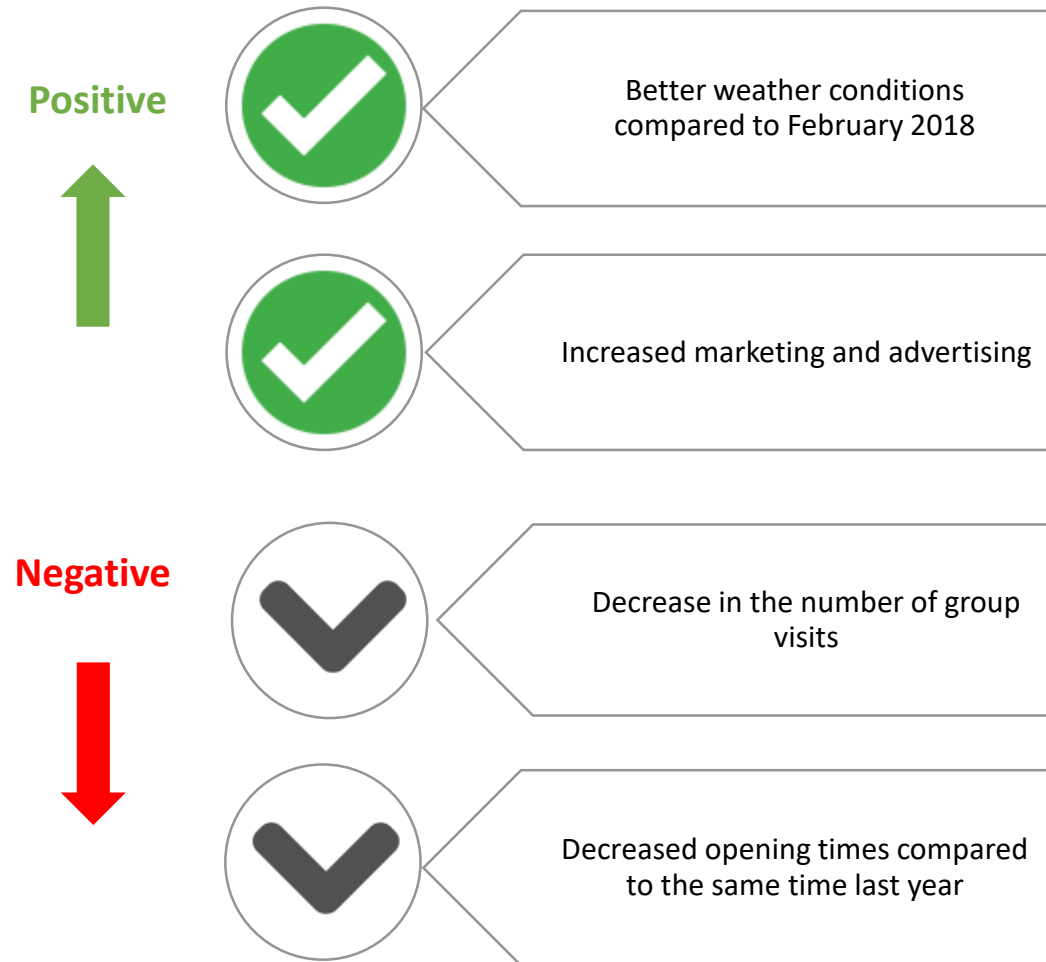
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Visitor numbers for the year to date (YTD)

Month	2018	2019	% change for month	YTD Totals 2018	YTD Totals 2019	% change for YTD
January	48,057	48,568	+1.1%	48,057	48,568	+1.1%
February	33,633	40,705	+21.0%	82,201	89,273	+8.6%
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						
February*	33,633	40,705	+21.0%	82,201	89,273	+8.6%

**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.*

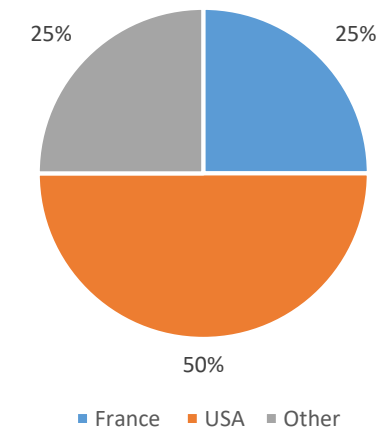
Factors influencing visitor attractions' performance



Origin of visitors to attractions

- During February 2019, on average **93%** of visitors to attractions that completed the Barometer were domestic, **3%** were long haul and **4%** were European.
- Out of all the overseas visitors, **50%** of attractions reported guests from The USA as being their most prevalent market, followed by **25%** from France and **25%** from 'other' countries.

Origin of overseas visitors to attractions



Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in February 2019



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Hertfordshire Accommodation





Serviced Accommodation

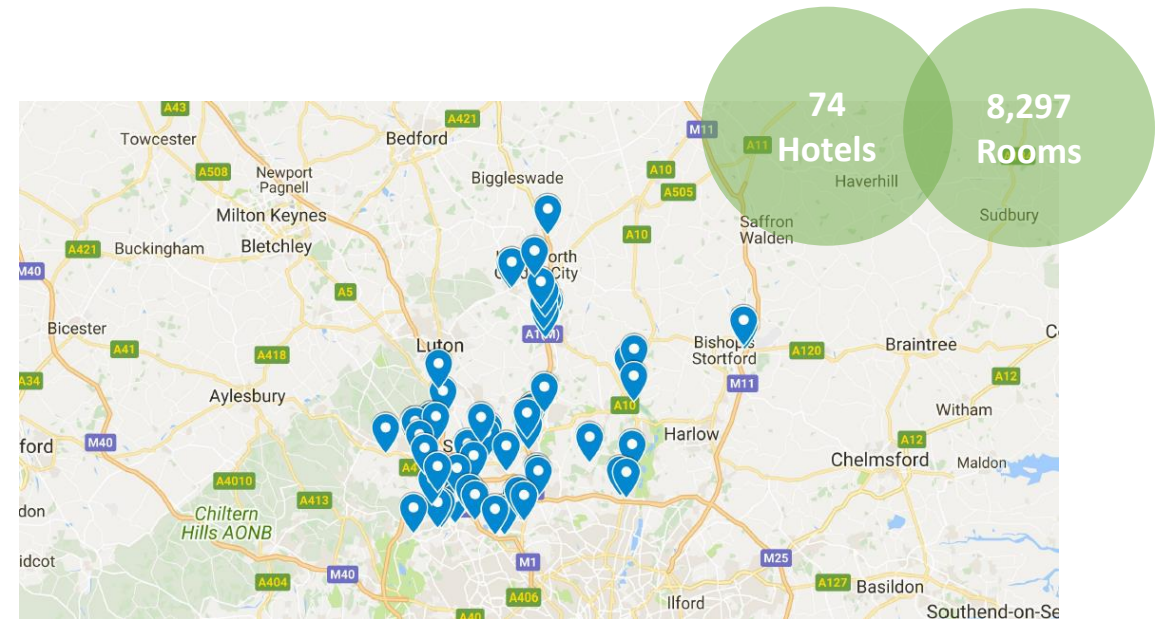
- According to figures from STR Global for **74** larger and chain hotels, accommodation providers experienced an average occupancy of **72.1%**.
- Hertfordshire accommodation providers experienced a slight increase of **+1.2%** in room occupancy compared to February 2018.
- Revenue per available room was down **-1.4%** and average daily rate saw a decrease of **-2.5%** compared to February 2018.

Year on year room occupancy comparison (%)

Hertfordshire	February 2018	February 2019	February 18/19
Occupancy	71.3%	72.1%	+1.2%

This year ... so far (%)

Hertfordshire	Jan 2019	Feb 2019	Mar 2019	Apr 2019	May 2019	June 2019
Occupancy	63.7%	72.1%				
	July 2019	Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019
Occupancy						



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





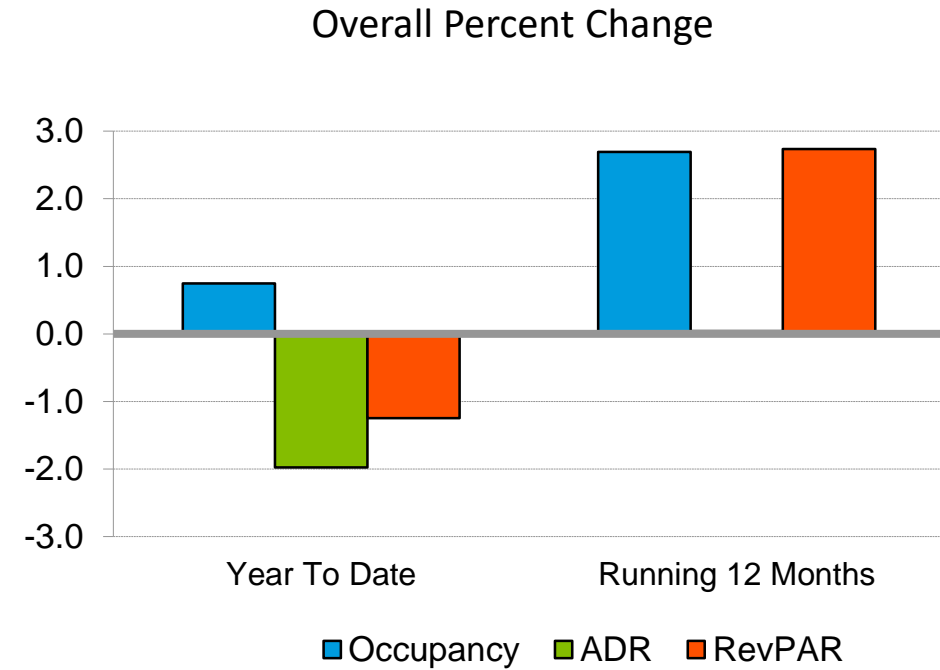
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	February 2018	February 2019	February 18/19
ADR	£65.85	£64.19	-2.5%

Year on year revenue per available room comparison (%)

Hertfordshire	February 2018	February 2019	February 18/19
RevPAR	£46.93	£46.28	-1.4%



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

Year on year average supply comparison (%)

Hertfordshire	February 2018	February 2019	February 18/19
Supply	285,068	287,028	+0.7%

Year on year average demand comparison (%)

Hertfordshire	February 2018	February 2019	February 18/19
Demand	203,153	206,914	+1.9%



Image credit: Champneys



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Other News



VisitEngland Occupancy Survey: January 2019 results

Summary of Results

- Room occupancy in January remained level at **65%** whilst bedspace occupancy increased by **+1%** to 45% when compared to January 2018.
- In January there was an increase of **+2.2%** in room supply and an increase of **+2.7%** in demand when compared to the same month in 2018.
- RevPAR, which is the total room revenue divided by the total number of available rooms, increased by **+2%** in January to £55.31 compared to the previous year.
- City/large town room occupancy remained level at 66% whilst bedspace occupancy increased by **+1%** to 46%. Seaside room occupancy increased by **+2%** to 58%, bedspace occupancy also increased by **+1%** to 43%. Small town room occupancy increased by **+2%** to 60%, bedspace occupancy also increased by **+1%** to 43%. Countryside room occupancy increased by **+2%** to 51% and bedspace occupancy increased by **+1%** to 34%.
- Looking at occupancy rates by establishment size, establishments with 101+ rooms showed greatest percentage increase in room occupancy, increasing by of **+1%** to 66% compared to the same period last year and increasing bedspace occupancy by **+1%** to 46%. Rooms with 26-50 & 51-100 rooms did not show any change in room occupancy in January 2019 from January 2018.
- Looking at occupancy rates by region, the biggest shift came from Greater London, which increased by **+3%** in room occupancy and +1% in bedspace occupancy. All other regions changed by 1% or less for both room and bedspace occupancy when compared to January 2018.

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, February 2019. Thank you.



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