VISIT HERTS

BUSINESS BAROMETER

January 2019

GO TO PLACES

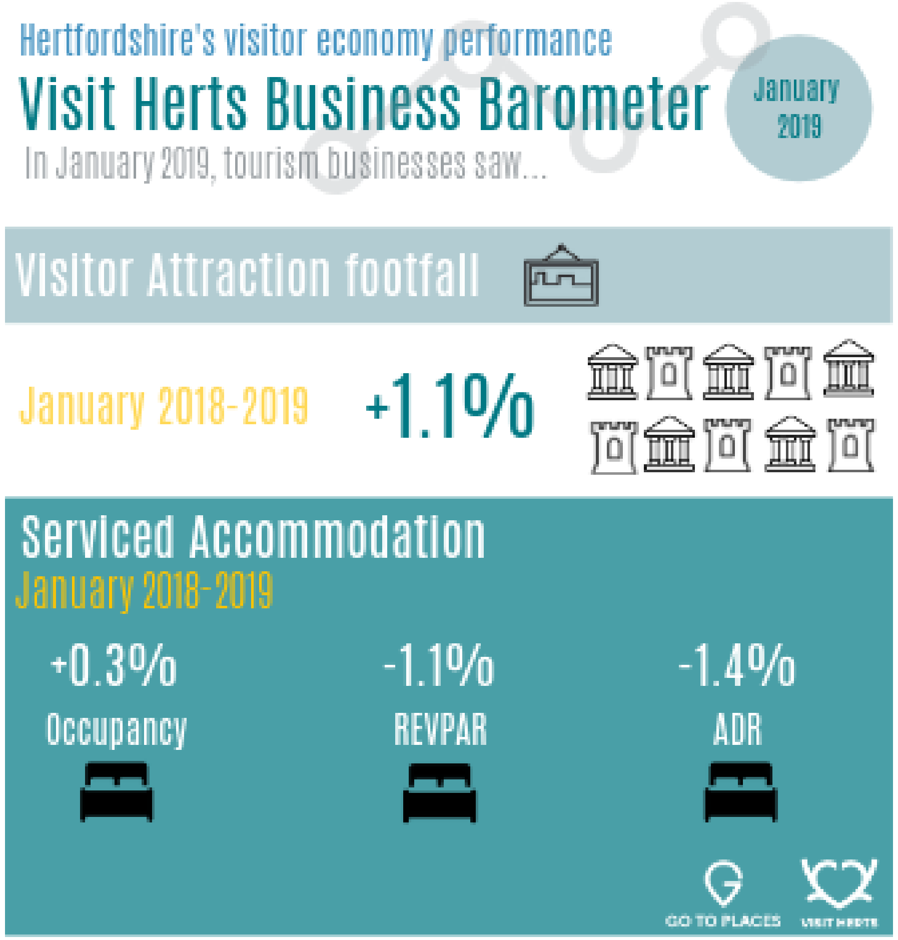
Credit: Nigel Moore

Credit: Chris Orange

Contents

Key Findings

- In January 2019, Hertfordshire attractions experienced a **+1.1%** increase in visitor footfall, compared to January 2018.
- Factors cited by attractions as having positively impacted visitor footfall included increased marketing activity, new projects taking place and better weather, compared to the same time the previous year.
- Serviced accommodation providers saw an increase in room occupancy of **+0.3%** compared to January 2018.
- **95%** of visitors to attractions were domestic and **5%** were from overseas. Out of all the overseas visitors, **50%** of attractions reported guests from the France as being their most prevalent market, alongside **50%** of attractions reporting visitors from the USA as their most prevalent market.



Visit Herts Team Update: Digital statistics

January 2019 Stats

Website

10,783 sessions

25,211 pages views

1.31 average dwell time

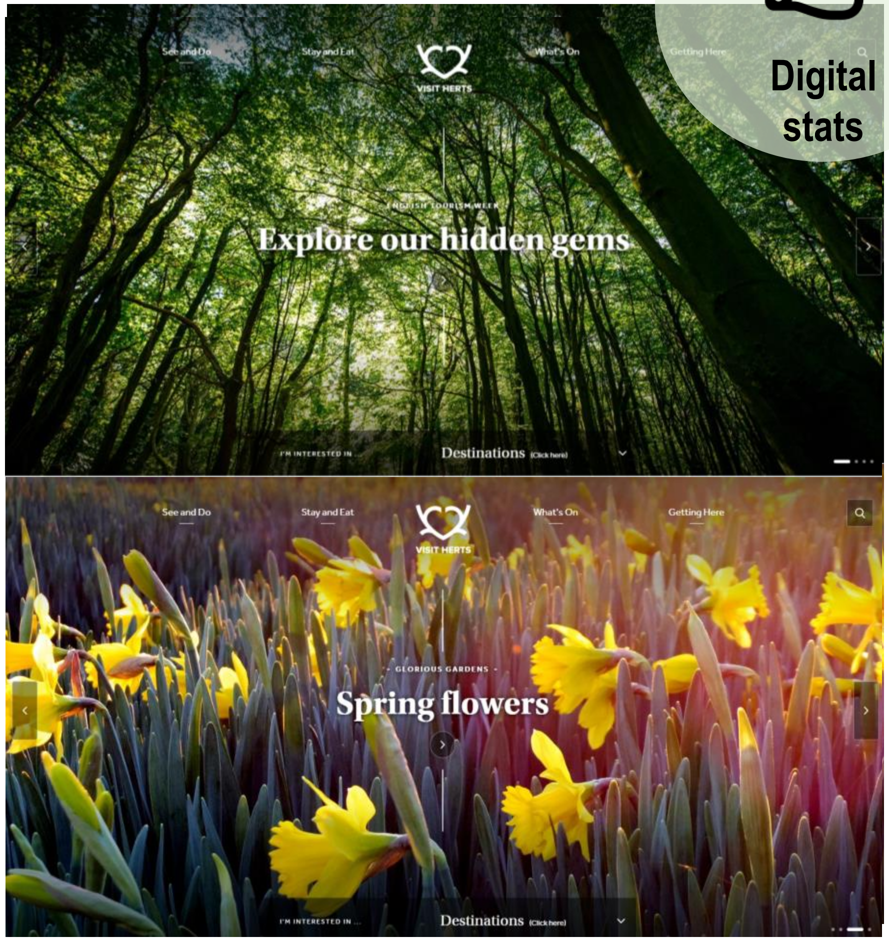
Social Media

2,067 followers

1,326 followers

1,482 followers

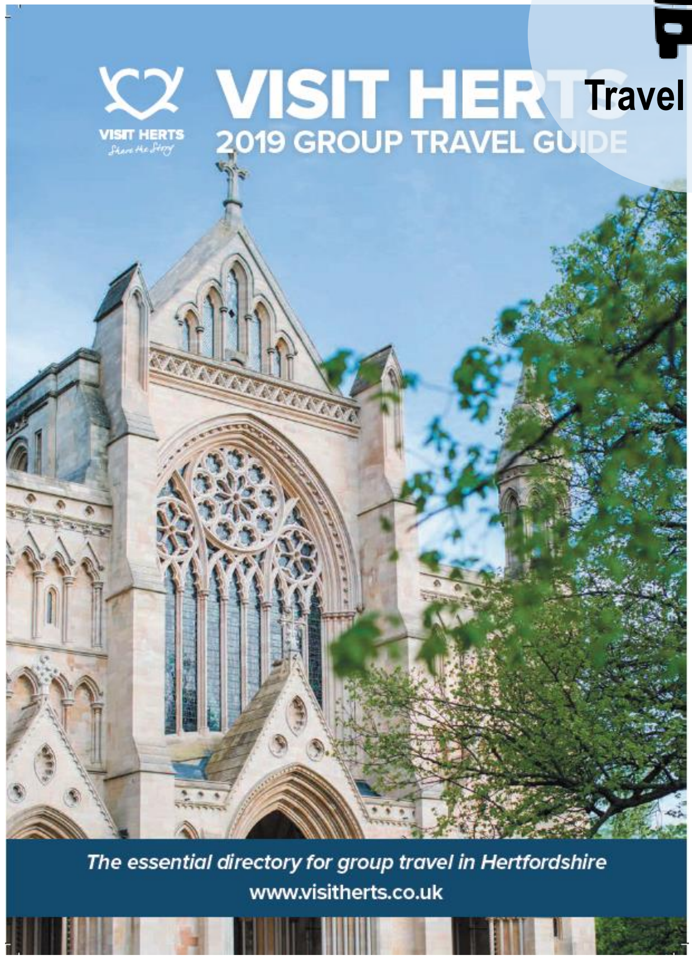
Digital stats



Visit Herts Team Update: Travel Trade

- January started of with a bang for travel trade with a dedicated Gourmet Garden Trails presence at Vakantiebuers, the largest trade and consumer travel exhibition in the Netherlands. The Dutch market was engaged with the product and were keen to find out more about the easy access routes from the ferry arriving in Harwich (Essex) and travelling on into Herts with a gourmet foodie experiences.

- In addition, Visit Herts had a large stand at Excursions with several partners joining with desks. The show was busy with lots of interest from group organisers, and several other exhibitors commented on how much they liked the Herts stand and were keen to replicate in their own regions.



Travel Trade

Visitor Attractions

Visitor Attractions

Visitor numbers January 2018/2019

2018	2019	% change
48,057	48,568	+1.1%

Range of performance January 2018/2019

57% of Hertfordshire attractions were up this month, ranging from **+7.4%** up to **+35.2%** up, with **43%** of attractions reporting a decrease in footfall.

Attractions up	Attractions down
57%	43%

Performance according to cost January 2018/2019

Charging	Free
+15.7%	-25.1%

Performance according to attraction location January 2018/2019

Urban	Rural
+1.1%	-0.9%

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						
March						
April						
May						
June						
July						
August						
September						
October						
November						
December						
January*	48,057	48,568	+1.1%	48,057	48,568	+1.1%

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

- A dryer January compared to the previous year
- Strong marketing activity and new projects

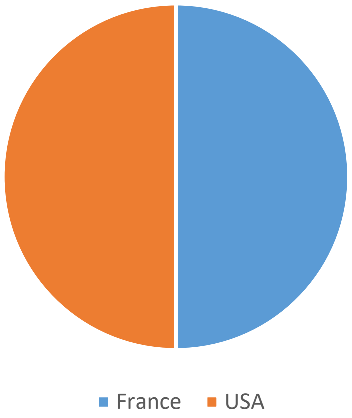
Negative

- Poor weather in comparison to January 2018
- Reduction in the number of school groups

Origin of visitors to attractions

- During January 2019, on average **95%** of visitors to attractions that completed the Barometer survey were domestic, **2%** were long haul and **3%** were European.
- Out of all the overseas visitors, **50%** of attractions reported guests from France as being their most prevalent market, alongside **50%** of attractions reporting visitors from the USA as their most prevalent market.

Origin of visitors to Hertfordshire attractions



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

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **74** larger and chain hotels, accommodation providers experienced an average occupancy of **63.7%.**
- Hertfordshire accommodation providers experienced a slight increase of **+0.3%** in room occupancy compared to January 2018.
- Revenue per available room was down **-1.1%** and average daily rate saw a decrease of **-1.4%** compared to January 2018.

Year on year room occupancy comparison (%)

Hertfordshire	January 2018	January 2019	January 18/19
Occupancy	63.5%	63.7%	+0.3%

This year … so far (%)

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

74 Hotels

8,297 Rooms

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

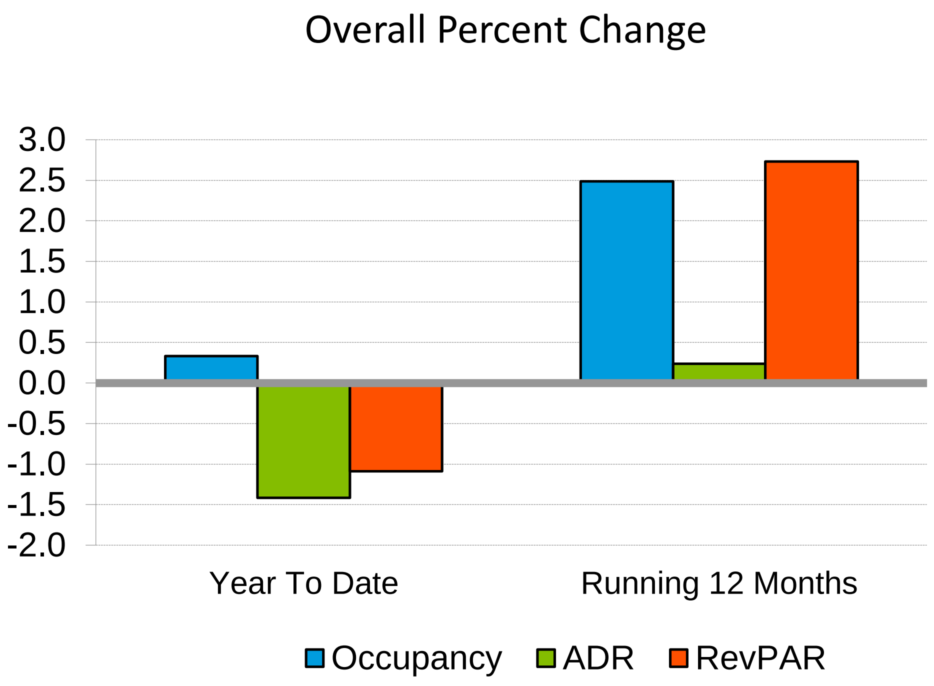
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	January 2018	January 2019	January 18/19
ADR	£63.53	£62.63	-1.4%

Year on year revenue per available room comparison (%)

Hertfordshire	January 2018	January 2019	January 18/19
RevPAR	£40.36	£39.92	-1.1%



Graph showing the overall percentage change in occupancy, average daily rate and revenue available per room both year to date and running 12 months.

Serviced Accommodation

Year on year average supply comparison (%)

Hertfordshire	January 2018	January 2019	January 18/19
Supply	315,270	317,626	+0.7%

Year on year average demand comparison (%)

Hertfordshire	January 2018	January 2019	January 18/19
Demand	200,293	202,461	+1.1%

Image credit: Champneys

Other News

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.

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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.

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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
Ruby Berkeley-Cornner- ruby.berkeley-cornner@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, January 2019. Thank you.