VISIT HERTS

BUSINESS BAROMETER

March 2019

GO TO PLACES

Credit: Nigel Moore

Credit: Chris Orange

Introduction

We all know how important it is for organisations and destinations to be able to access timely information on the performance of the visitor economy and the factors that may influence it, either positively or negatively. This is what the Business Barometer sets out to do – offering a monthly snapshot of the industry's performance, based on the feedback received from a range of tourism businesses including, visitor attractions and serviced accommodation providers.

For visitor attractions, data is collected through the use of a short online survey, sent out on a monthly basis, with questions centred on visitor footfall for that particular month and for the same month the previous year. This allows for direct like-for-like comparisons to be made and to ensure the results are based on a reliable and robust sample. For serviced accommodation providers, data is provided by hotel benchmarking company STR Global, who were also awarded the contract to provide serviced accommodation data by VisitEngland. In using this method it allows accommodation data to feed into national level studies such as the England occupancy survey, consequently allowing the monthly business barometer figures to be accurately benchmarked against national level figures.

This report summarises findings from March 2019, looking at the performance of tourism businesses and giving a snapshot of Hertfordshire's visitor economy in comparison to the same time the previous year. Alongside this, the report will also benchmark against national level figures where possible.

We are always actively working to increase the sample of businesses that contribute to the barometer and we would really encourage tourism businesses that do not currently take part to sign-up, as the barometer has proven to be a valuable and timely benchmarking tool, with results having been previously used to support strategic plans and planning and funding applications.

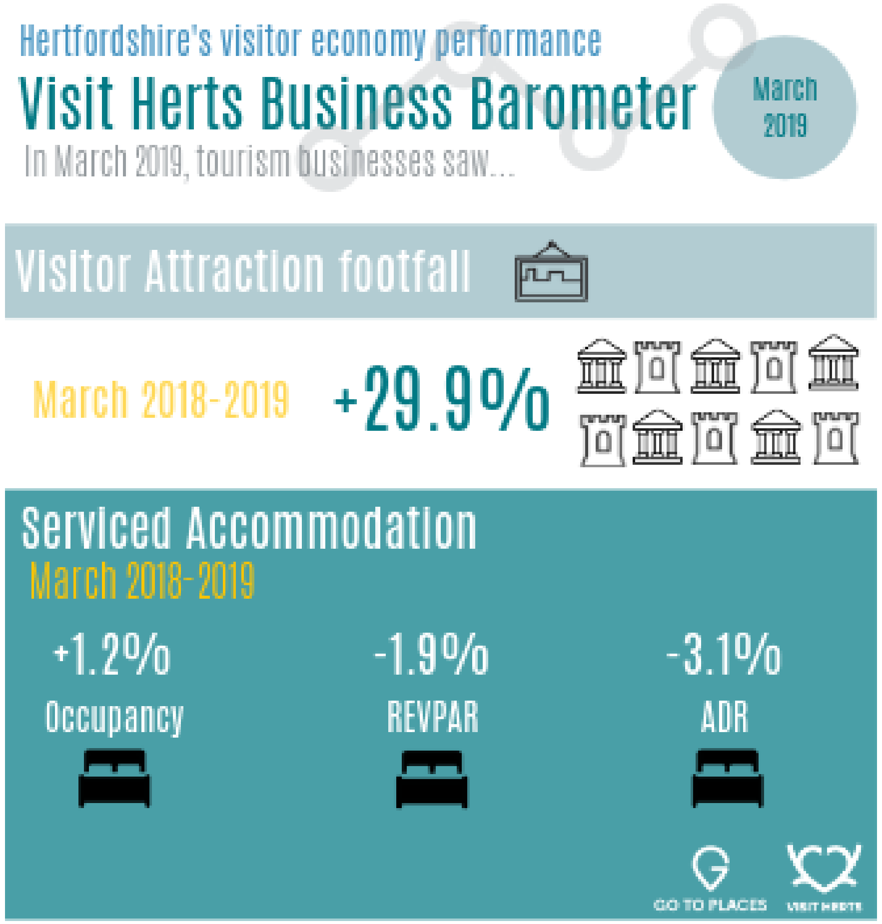
Image credit: Champneys

Contents

- Key findings 4
- Visit Herts Team update 5
- Visitor Attractions: monthly performance 8
- Serviced Accommodation: monthly performance 11
- Other news: national picture 15
- Glossary 18

Key Findings

- In March 2019, Hertfordshire attractions experienced a **+29.9%** increase in visitor footfall, compared to March 2018.
- Factors cited by attractions as having positively impacted visitor footfall predominantly included better weather conditions compared to March 2018 and increased opening times.
- Serviced accommodation providers saw an increase of **+1.2%** in room occupancy compared to the same month last year.
- **92%** of visitors to attractions were domestic and **8%** were from overseas. Out of all the overseas visitors, **60%** of attractions reported guests from the USA as being their most prevalent market, followed by **20%** from France and **20%** from 'other' countries, including, Poland and Lithuania.



Visit Herts Team Update: Digital statistics

Digital stats

March 2019 Stats

Website

11,591 sessions

30,241 pages views

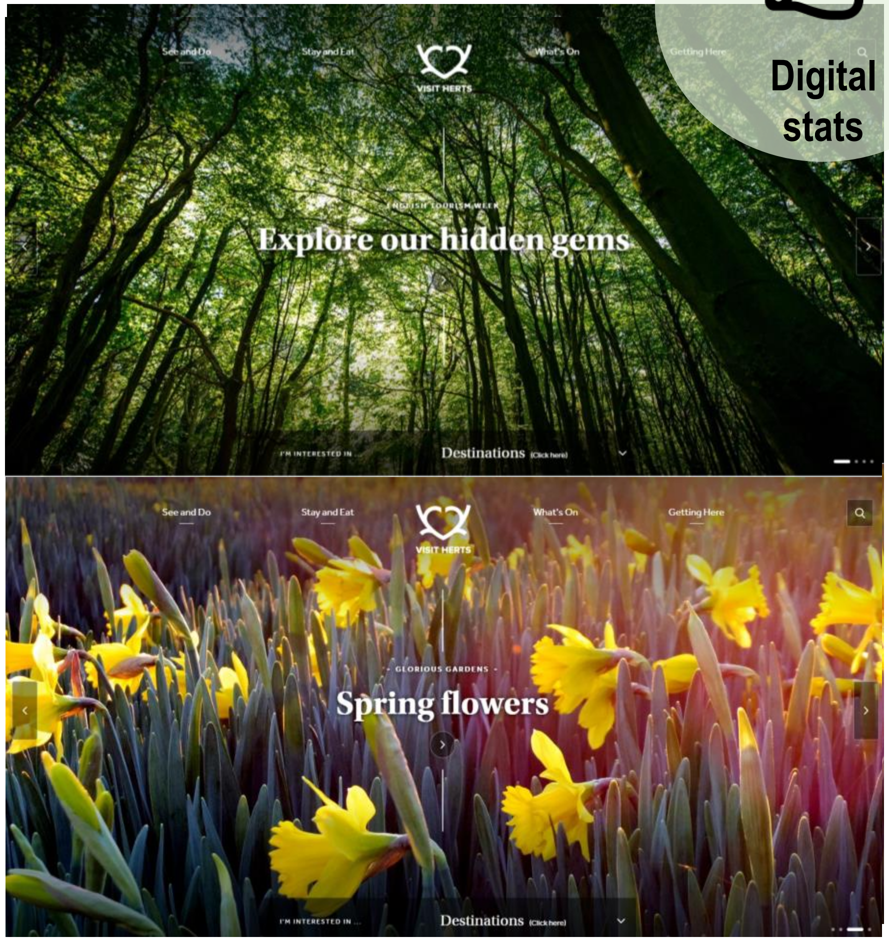
1.26 average dwell time

Social Media

2,149 followers

1,441 followers

1,586 followers



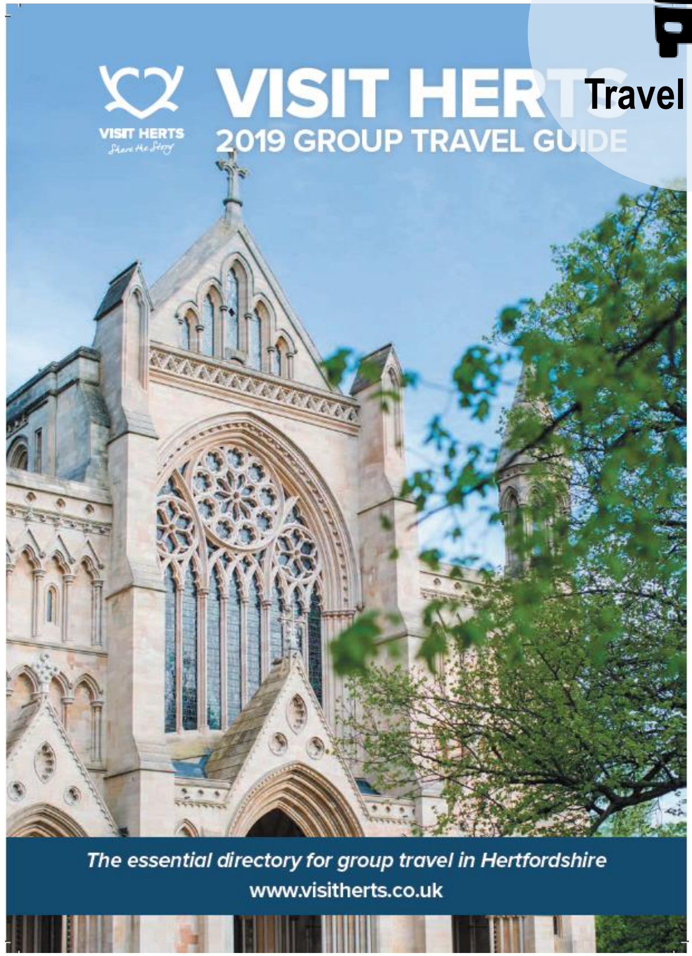
Visit Herts Team Update: Travel Trade

March 2019

- March continues to be a busy month for travel trade activity. The team attended the world's largest B2B trade show, ITB Berlin at the beginning of the month, receiving exposure through the dedicated stand and discussions as part of the Gourmet Garden Trails project.

- The team also visited the British Tourism and Travel Show to evaluate the event for a possible presence next year, however it was felt that this is perhaps not the best fit. The team, along with several of our partners went along to the Group Leisure Show preview day, which has moved location from Birmingham to Milton Keynes, and was considered a better fit for Hertfordshire target markets.

- Conversations were had with Expedia this month to understand how Hertfordshire product could feature on their channels, along with securing AC Tours as a dedicated distributor of Hertfordshire GGT products and experiences.



Travel Trade

Visitor Attractions

Visitor Attractions

Visitor numbers March 2018/2019

2018	2019	% change
30,980	40,248	+29.9%

Range of performance March 2018/2019

83% of Hertfordshire attractions were up this month, ranging from **+2.6%** up to **+55.9%** up, with **17%** of attractions reporting a decrease in footfall.

Attractions up	Attractions down
83%	17%

Performance according to cost March 2018/2019

Charging	Free
+51.9%	+2.1%

Performance according to attraction location March 2018/2019

Urban	Rural
+6.6%	+31.6%

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	30,980	40,248	+29.9%	113,181	129,521	+14.4%
April						
May						
June						
July						
August						
September						
October						
November						
December						
March*	30,980	40,248	+29.9%	113,181	129,521	+14.4%

**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

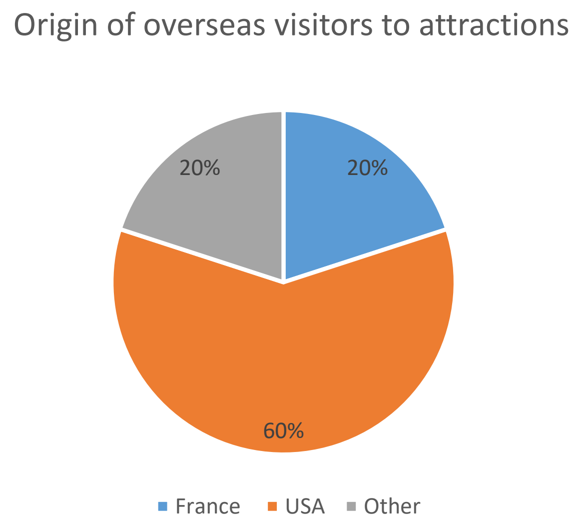
- Increased opening times compared to March 2018.
- Improvement to weather compared to March 2018.

Negative

- Decrease in the number of group visits.
- Changes to the dates of the Herts Big Weekend and Easter.

Origin of visitors to attractions

- During March 2019, on average **92%** of visitors to attractions that completed the Barometer were domestic, **4%** were long haul and **4%** were European.
- Out of all the overseas visitors, **60%** of attractions reported guests from the USA as being their most prevalent market, followed by **20%** from France and **20%** from 'other' countries, including, Poland and Lithuania.



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

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **74** larger and chain hotels, accommodation providers experienced an average occupancy of **72.9%.**
- Hertfordshire accommodation providers experienced an increase of **+1.2%** in room occupancy compared to March 2018.
- Revenue per available room was down **-1.9%** and average daily rate saw a decrease of **-3.1%** compared to March 2018.

Year on year room occupancy comparison (%)

Hertfordshire	March 2018	March 2019	March 18/19
Occupancy	72.1%	72.9%	+1.2%

This year … so far (%)

Hertfordshire	Jan 2019	Feb 2019	Mar 2019	Apr 2019	May 2019	June 2019
Occupancy	63.7%	72.1%	72.9%			
	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.

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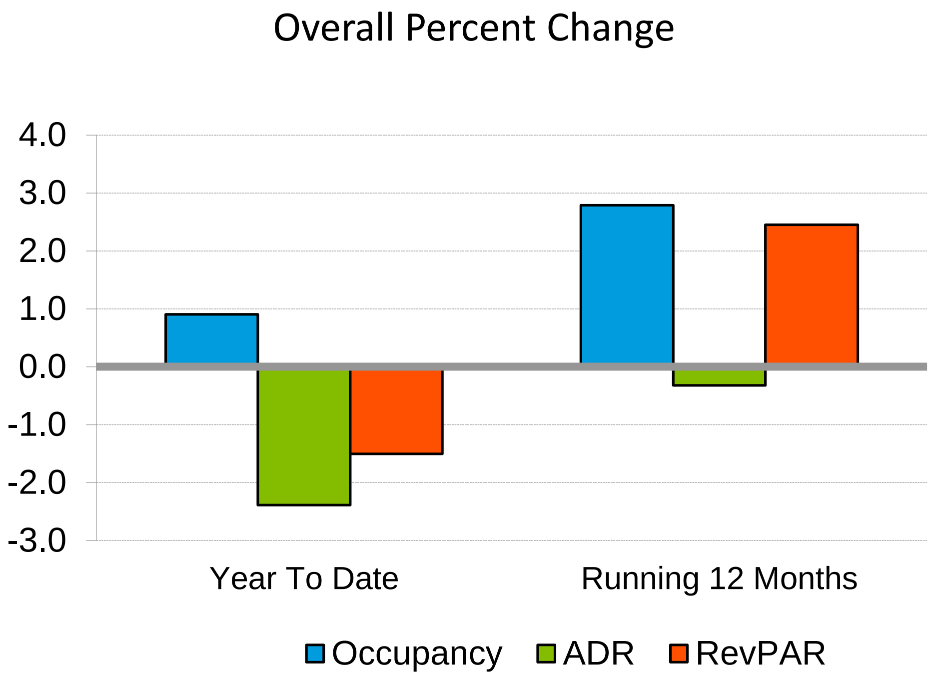
Serviced Accommodation

Year on year average daily rate comparison (%)

Hertfordshire	March 2018	March 2019	March 18/19
ADR	£67.80	£65.71	-3.1%

Year on year revenue per available room comparison (%)

Hertfordshire	March 2018	March 2019	March 18/19
RevPAR	£48.86	£47.92	-1.9%



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	March 2018	March 2019	March 18/19
Supply	315,704	317,781	+0.7%

Year on year average demand comparison (%)

Hertfordshire	March 2018	March 2019	March 18/19
Demand	227,524	231,732	+1.8%

Image credit: Champneys

Other News

Other News

VisitEngland Occupancy Survey: February 2019 results

Summary of Results

- Room occupancy in February remained level at 73% whilst bedspace occupancy remained level at 52% when compared to February 2018. In February there was an increase of +2.4% in room supply and an increase of +2.5% 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, was at a similar level in February compared to the previous year at £63.56.

- City/large town room occupancy remained level at 74% whilst bedspace occupancy also remained level at 52%. Seaside room occupancy increased by +1% to 70%, bedspace occupancy also increased by +1% to 53%. Small town room occupancy decreased by -1% to 68%, bedspace occupancy also fell by -1% to 49%. Countryside room occupancy decreased by -1% to 61% and bedspace occupancy also fell by -1% to 42%.

- Looking at occupancy rates by establishment size, establishments with 1 - 25 rooms showed greatest percentage increase in room occupancy, increasing by of +2% to 70% compared to February 2018 and increasing bedspace occupancy by +1% to 51%. All other establishment sizes remained at a similar level in both room and bedspace occupancy levels when compared to February 2018.

- Looking at occupancy rates by region, the biggest increases came from Northwest England & Yorkshire & Humberside, both increasing room occupancy by +1% to 74% & 72% respectively. Both regions also saw a +1% increase in bedspace occupancy. All other regions were at a similar level or decreased in room occupancy in February 2019, ranging from a 0% to – 2% change compared to February 2018.

To view the full report click here

Other News

GB Day Visits March 2019 results

Summary of Results

- The volume of day visits in Great Britain in the three months to March 2019 decreased by -6% when compared with the same period last year, to 356 million. The value of those visits also decreased by -2% during the same period to £13.7 billion.

- Year to date at the GB level, shows the same figures as three months figures, due to this month being the 3rd month of the year.

- Looking at England, volume decreased by -6% in the three months to March 2019 to 303 million visits, while value increased by +1% to £11.5 billion compared to the same period in 2018.

- Year to date at the England level, shows the same figures as three months figures, due to this month being the 3rd month of the year.

- 3+ hour day visits in Great Britain for the three months to March 2019 decreased by -6% when compared to 2018, to 607 million visits.

- The value of these visits decreased by -11% for the three months against the same period last year to £19.1 billion.

- Year to date at the GB level, shows the same figures as three months figures, due to this month being the 3rd month of the year.

- In England, volume declined by -6% in the three months to March 2019 to 508 million. The value of these visits also decreased by -10% to 16.1 billion.

- Year to date at the England level, shows the same figures as three months figures, due to this month being the 3rd month of the year.

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, March 2019. Thank you.