



# VISIT HERTS BUSINESS BAROMETER

April 2019



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*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 April 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



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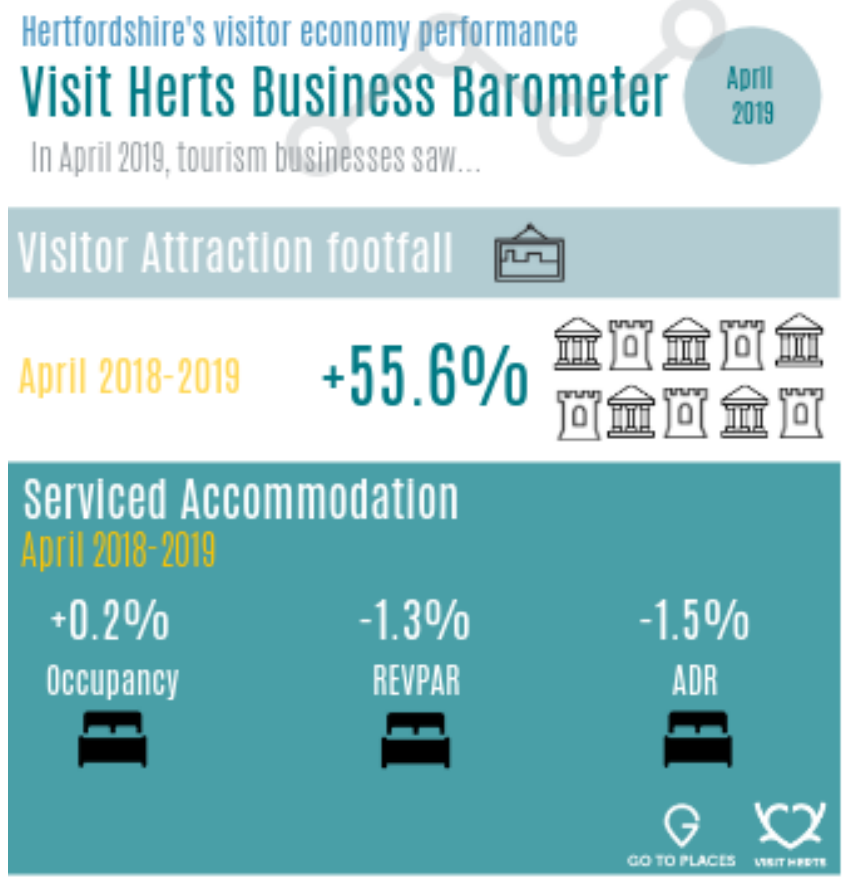
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# Key Findings



- In April 2019, Hertfordshire attractions experienced a significant **+55.6%** increase in visitor footfall, compared to April 2018. Factors that influenced attractions' performance largely included the fact that last year Easter and the Kent Big Weekend fell in March, whereas this year they fell in April, resulting in additional footfall to attractions.
- Other factors cited by attractions as having positively impacted visitor footfall predominantly included, better weather conditions compared to April 2018, alongside well performing Easter marketing campaigns and increased publicity.
- Serviced accommodation providers saw a slight increase of **+0.2%** in room occupancy compared to April 2018.
- During April 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, **37.5%** of attractions reported guests from France as being their most prevalent market, in addition to **37.5%** from the USA.





## Visit Herts Team Update: Digital statistics

April 2019

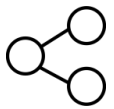


Website

16,830 sessions

44,082 pages views

1.27 average dwell time



Social Media



2,199 followers



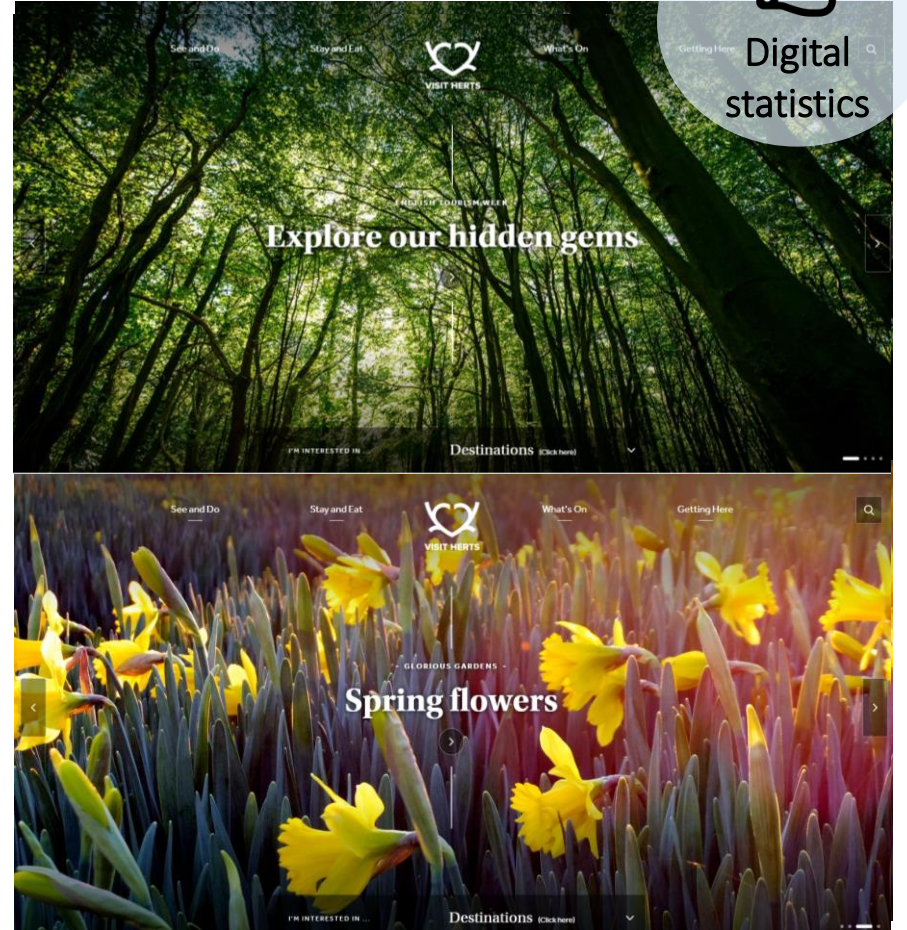
1,475 followers



1,662 followers



Digital statistics



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## Visit Herts Team Update: Travel Trade & PR

### April 2019: Travel Trade

- With no trade shows or events taking place in April 2019, time was spent drafting the brand new travel trade strategy with the CEO, looking to introduce a new and refreshed approach to targeting the B2B sector.
- Work also started on the development of a brand new online travel trade hub, where buyers will be able to log on securely and access information and inspiration about Hertfordshire for their programmes.
- Further talks were also had with UKinbound around securing familiarisation trips for later in the year.

### March & April 2019: PR

- The Visit Herts team issued two press releases including one on the Herts Big Weekend and another on family fun in Hertfordshire over Easter.
- The team also hosted a press trip to Hertfordshire for US journalists as part of the US Connections project.
- Alongside this, the team supplied information on afternoon teas to 'The Restaurant Club' for a forthcoming feature .





# Visitor Attractions







## Visitor Attractions: Monthly performance

### Visitor numbers April 2018/2019

2018	2019	% change
102,578	159,635	+55.6%

### Range of performance April 2018/2019

Attractions up	Attractions down
67%	33%

### Performance according to cost April 2018/2019

Charging	Free
+77.8%	-18.0%

### Performance according to attraction location April 2018/2019

Urban	Rural
+37.6%	+56.1%







## 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	102,578	159,635	+55.6%	215,759	289,156	+34.0%
May						
June						
July						
August						
September						
October						
November						
December						
April*	102,578	159,635	+55.6%	215,759	289,156	+34.0%

*\*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



Better weather conditions compared to April 2018.



Strong Easter campaigns attracted additional visitors, alongside extra publicity and marketing.

Negative



Reduced opening times compared to April 2018.



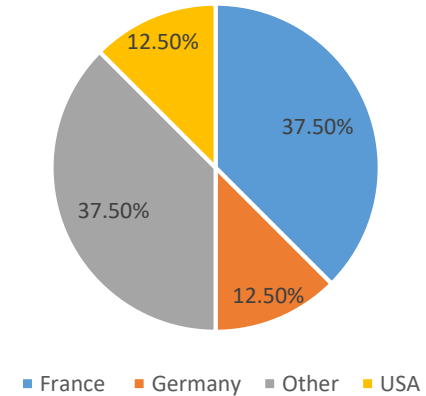
A decrease in the number of school group visits compared to April 2018.



### Origin of visitors to attractions

- During April 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, **37.5%** of attractions reported guests from the France as being their most prevalent market, in addition to **37.5%** from the USA.

Most prevalent overseas visitors to Hertfordshire visitor attractions



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





# Hertfordshire Accommodation







## Serviced Accommodation



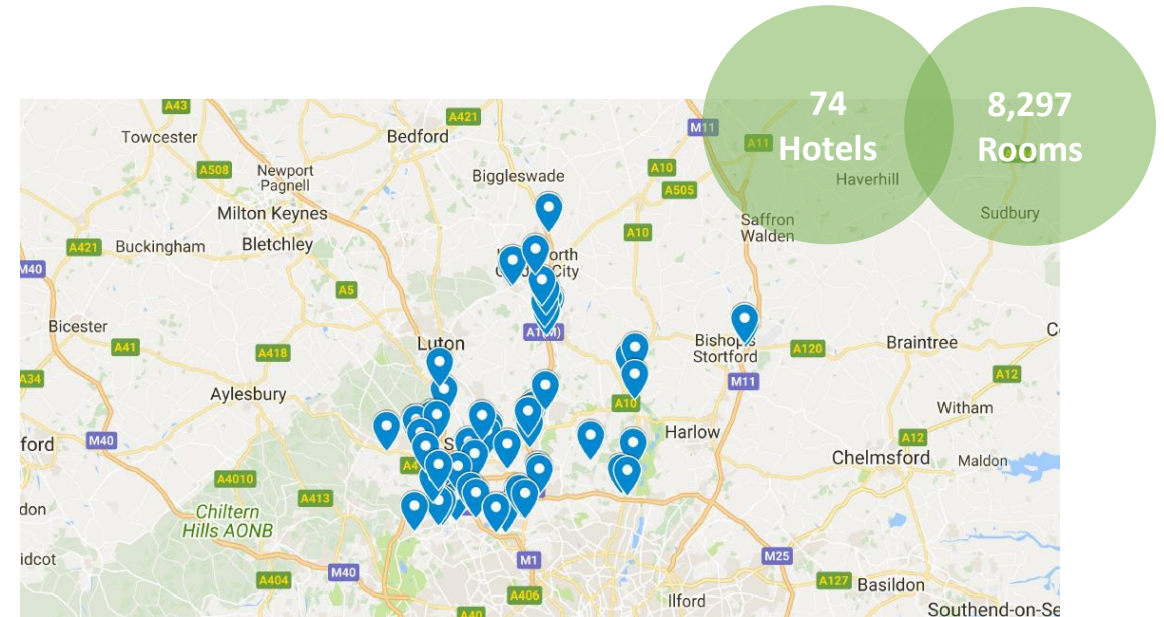
- According to figures from STR Global for **74** larger and chain hotels, accommodation providers experienced an average occupancy of **73.2%**.
- Hertfordshire accommodation providers experienced an increase of **+0.2%** in room occupancy compared to April 2018.
- Revenue per available room was down **-1.3%** and average daily rate also saw a decrease of **-1.5%** compared to April 2018.

### Year on year room occupancy comparison (%)

Hertfordshire	April 2018	April 2019	April 18/19
Occupancy	73.1%	73.2%	+0.2%

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

Hertfordshire	Jan 2019	Feb 2019	Mar 2019	Apr 2019	May 2019	June 2019
Occupancy	63.7%	71.1%	72.9%	73.2%	-	-
	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.



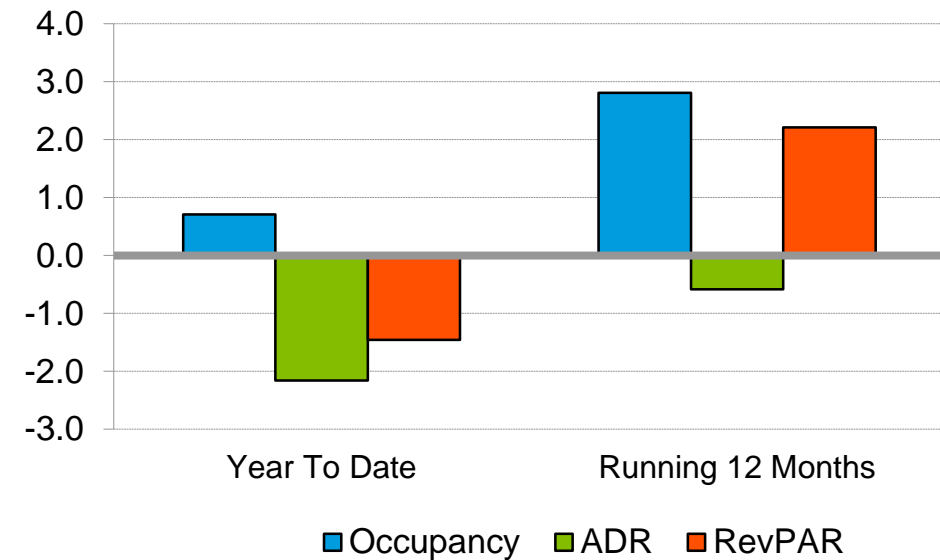
## Year on year ADR comparison (%)

Hertfordshire	April 2018	April 2019	April 18/19
ADR	£67.26	£66.25	-1.5%

## Year on year RevPAR comparison (%)

Hertfordshire	April 2018	April 2019	April 18/19
RevPAR	£49.17	£48.52	-1.3%

## Overall Percent Change



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





## Year on year average supply comparison (%)

Hertfordshire	April 2018	April 2019	April 18/19
Supply	305,520	307,530	+0.7%

## Year on year average demand comparison (%)

Hertfordshire	April 2018	April 2019	April 18/19
Demand	223,357	225,224	+0.8%



Image credit: Champneys





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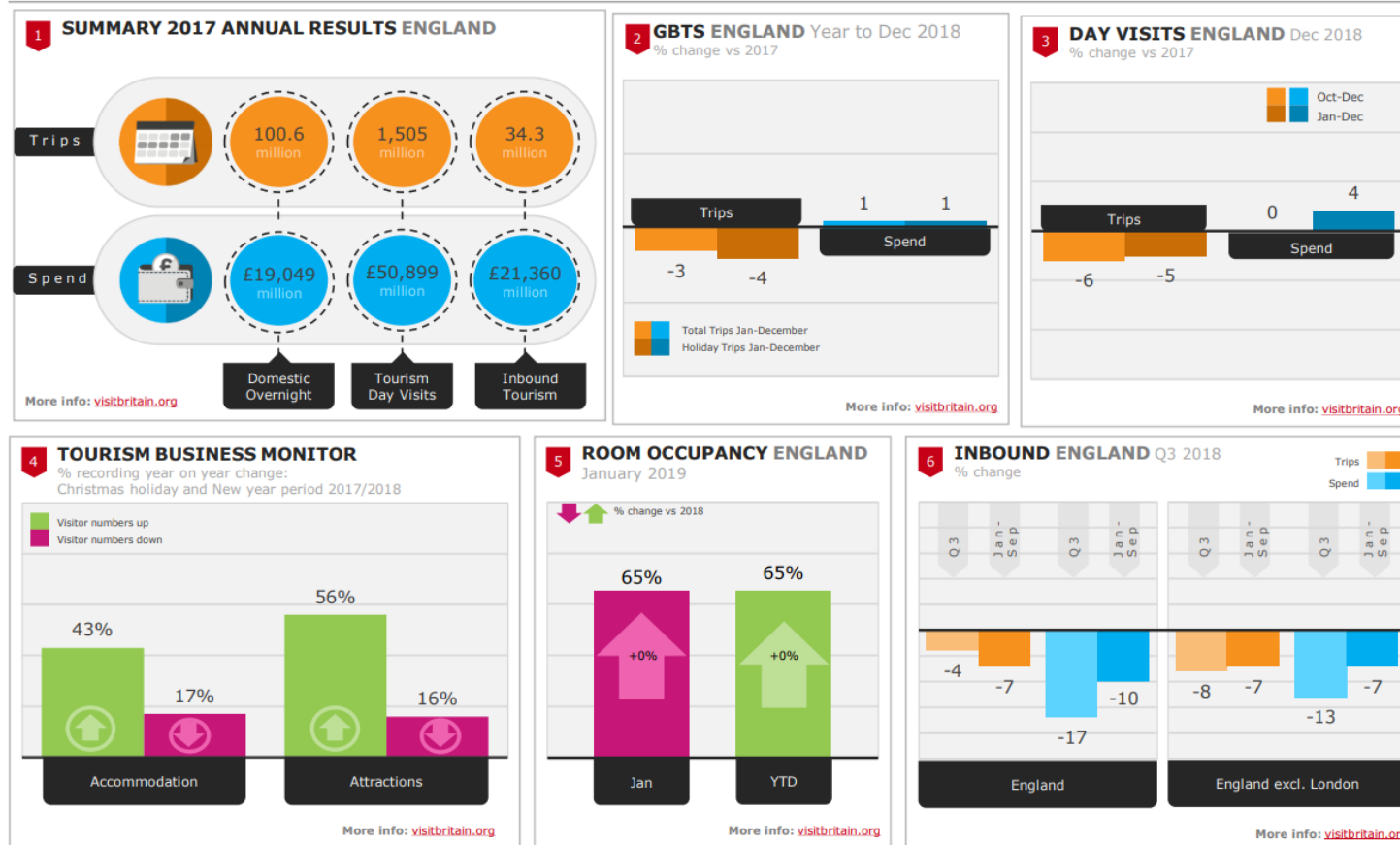
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# Other News





## LATEST TRENDS DASHBOARD Updated 15<sup>th</sup> April 2019



The VisitEngland latest trends dashboard is updated monthly with annual results from VisitBritain and VisitEngland key reports including the following-

- GBTS
- Day Visits to England summary
- England room occupancy
- Tourism Business Monitor
- Inbound statistics

Access the dashboard [here](#)

VisitEngland





### GB Day Visits April 2019 results

#### Tourism Day Visits Summary

- The volume of day visits in Great Britain in the three months to April 2019 decreased by **-7%** when compared with the same period last year, to 376 million.
- The value of those visits decreased by **-1%** during the same period to £14.7 billion.
- Year to date GB volume of day visits decreased by **-6%** to 500 million while value of visits increased by **+2%** to £19.7 billion.
- Looking at England, volume decreased by **-5%** in the three months to April 2019 at 319 million visits, while value increased by **+4%** to £12.4 billion compared to the same period in 2018.
- Year to date the volume of day visits in England decreased relative to the same period in 2018 by **-4%**, to 427 million while the value increased by **+6%** compared to the same period in 2018 at £16.7 billion.

#### 3+ Hour Day Visits Summary

- 3+ hour day visits in Great Britain for the three months to April 2019 decreased by **-7%** to 624 million visits, versus the same period in 2018.
- The value of these visits increased by **+2%** for the three months against the same period last year to £21.5 billion.
- Year to date, volume is down by **-5%** to 837 million 3+ hour visits and value decreased by **-2%** to £28.4 billion.
- In England, volume declined by **-6%** in the three months to April 2019 to 524 million. However, the value of these visits increased, by **+3%**, to 17.8 billion.
- Year to date the volume of day visits in England decreased relative to the same period in 2018 by **-5%**, to 705 million and the value decreased by **-2%** to £23.7 billion.

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





# Glossary

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**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



#### Contact us

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

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#### Previous reports

To view our previous Business Barometer reports and other research resources click [here](#)

#### Acknowledgements

If you wish to use any figures or information within this report, please acknowledge the source as Visit Herts Business Barometer, April 2019. Thank you.



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