



VISIT HERTS BUSINESS BAROMETER

May 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 May 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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Key Findings

Hertfordshire's visitor economy performance

Visit Herts Business Barometer

May 2019

In May 2019, tourism businesses saw...

Visitor Attraction footfall

May 2018-2019

+1.5%



Serviced Accommodation

May 2018-2019

-0.2%

Occupancy



-0.8%

REVPAR



-0.6%

ADR



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- In May 2019, Hertfordshire attractions experienced an increase of **+1.5%** in visitor footfall, compared to May 2018. Factors that influenced attractions' performance largely included, a popular half term period and an increase in the number of events hosted compared to May 2018.
- Serviced accommodation providers saw a slight decrease of **-0.2%** in room occupancy compared to May 2018, in line with a national decrease in overnight visitors.
- During May 2019, on average, **92%** of visitors to attractions that completed the Barometer were domestic, **4%** were long haul and **5%** 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.



Visit Herts Team Update: Digital statistics

May 2019

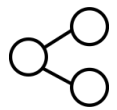


Website

16,415 sessions

42,765 pages views

1.24 minutes average dwell time



Social Media



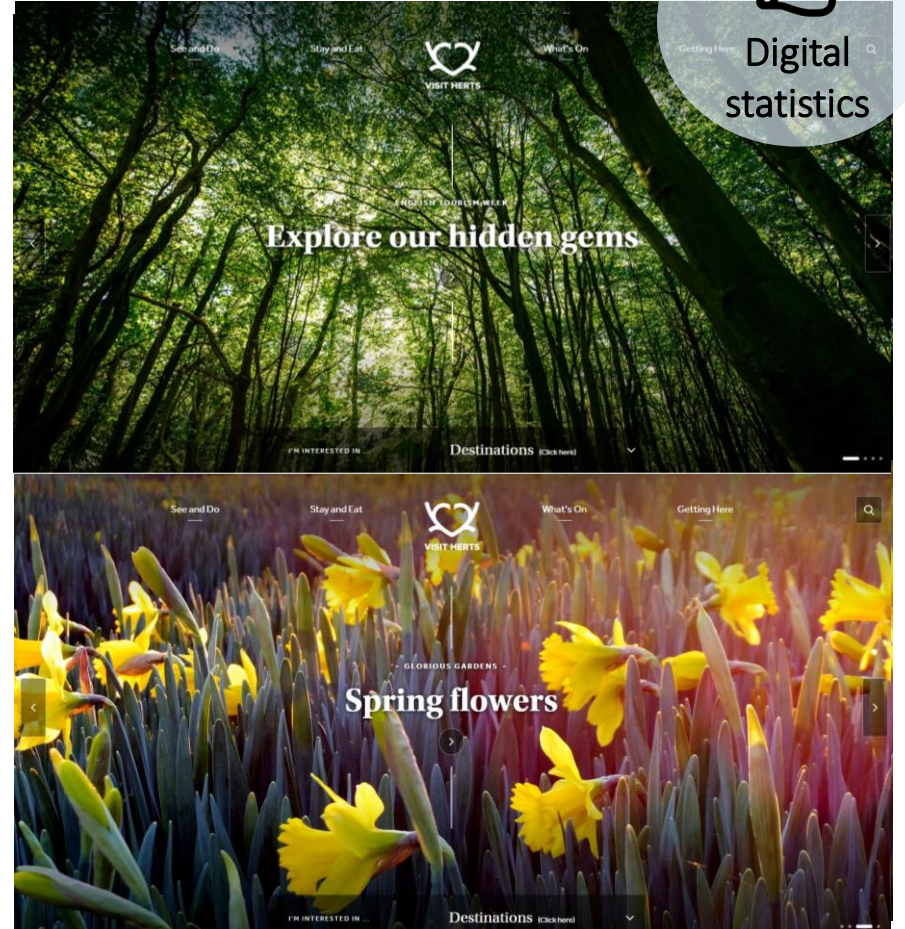
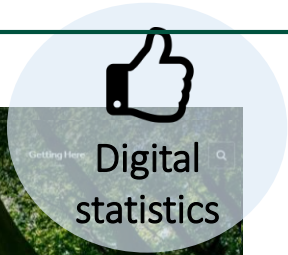
2,237 followers



1,529 followers



1,731 followers



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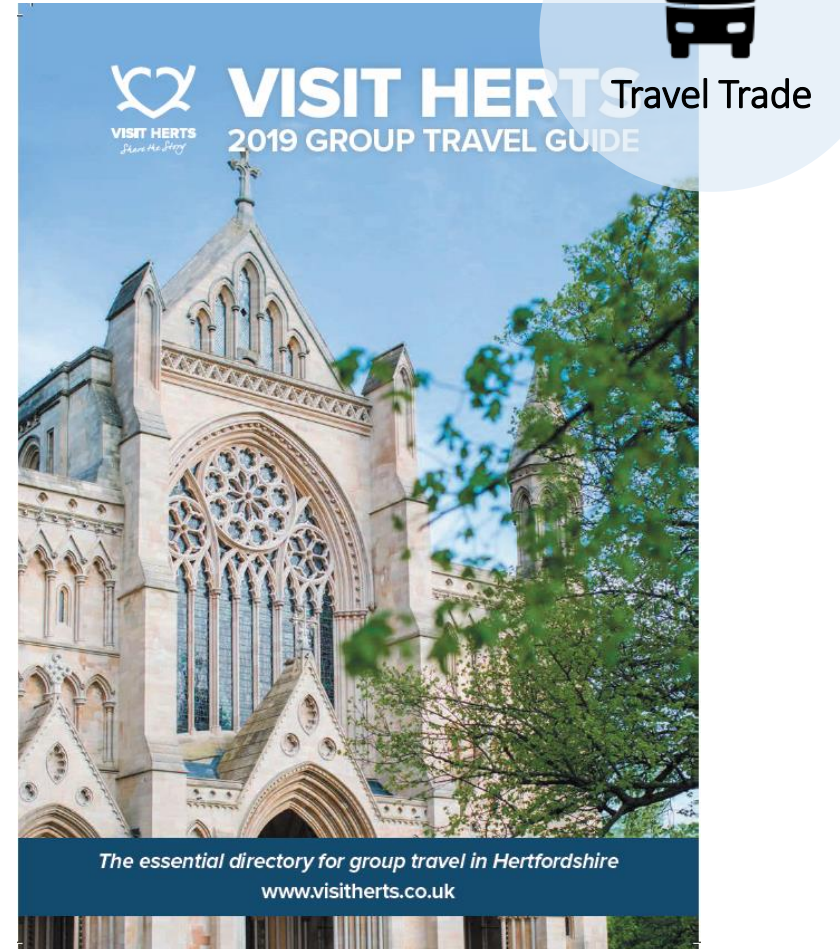
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Visit Herts Team Update: Travel Trade

May 2019: Travel Trade

- In May, the Herts trade team attended Explore GB, VisitBritain's flagship annual event, where appointments were had with over 40 international operators and buyers, looking for new product and inspiration in the UK - particularly outside of London. It was an ideal event to showcase the variety of experiences available in the county and how the trade can work with us on product development.
- In addition, the team travelled to London to meet with the sales team from Tour Partner Group, who own various operator brands in over 60 markets. The team delivered a presentation on the Gourmet Garden Trails project, the onboarded new product in the region and the different tools and ways in which they can engage with the business and include them in upcoming itineraries and programmes. This activity resulted in our team now confirming some dedicated activity to our key markets with Tour Partner Group to engage and drive sales and enquiries for GGT product.
- Finally, our travel trade manager organised and hosted a quarterly travel trade working group meeting, consisting of our partners most active and engaged with the travel trade. The meeting was used to present the brand-new Visit Herts Trade strategy, as well a round-table updates from business on performance and booking trends.



Visitor Attractions





Visitor Attractions: Monthly performance

Visitor numbers May 2018/2019

2018	2019	% change
74,455	75,564	+1.5%

Range of performance May 2018/2019

Attractions up	Attractions down
60%	40%

Performance according to cost May 2018/2019

Charging	Free
-3.6%	+36%

Performance according to attraction location May 2018/2019

Urban	Rural
+24.5%	+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	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	74,455	75,564	+1.5%	290,214	364,720	+25.7%
June						
July						
August						
September						
October						
November						
December						
May*	74,455	75,564	+1.5%	290,214	364,720	+25.7%

**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



An increase in the number of externally-hosted events compared to May 2018.



Popular half term period.

Negative



Better weather last May compared this year, resulting in a reduction in visitor footfall



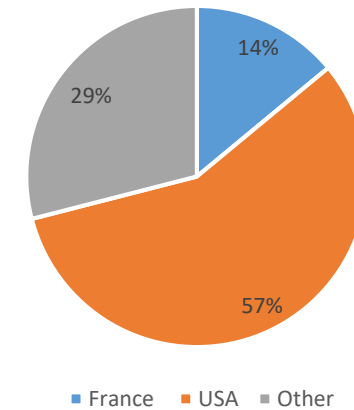
Reduced opening times of attractions compared to May 2018.



Origin of visitors to attractions

- During May 2019, on average, **92%** of visitors to attractions that completed the Barometer were domestic, **4%** were long haul and **5%** 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 markets to visitor attractions



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



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Hertfordshire Accommodation





Serviced Accommodation



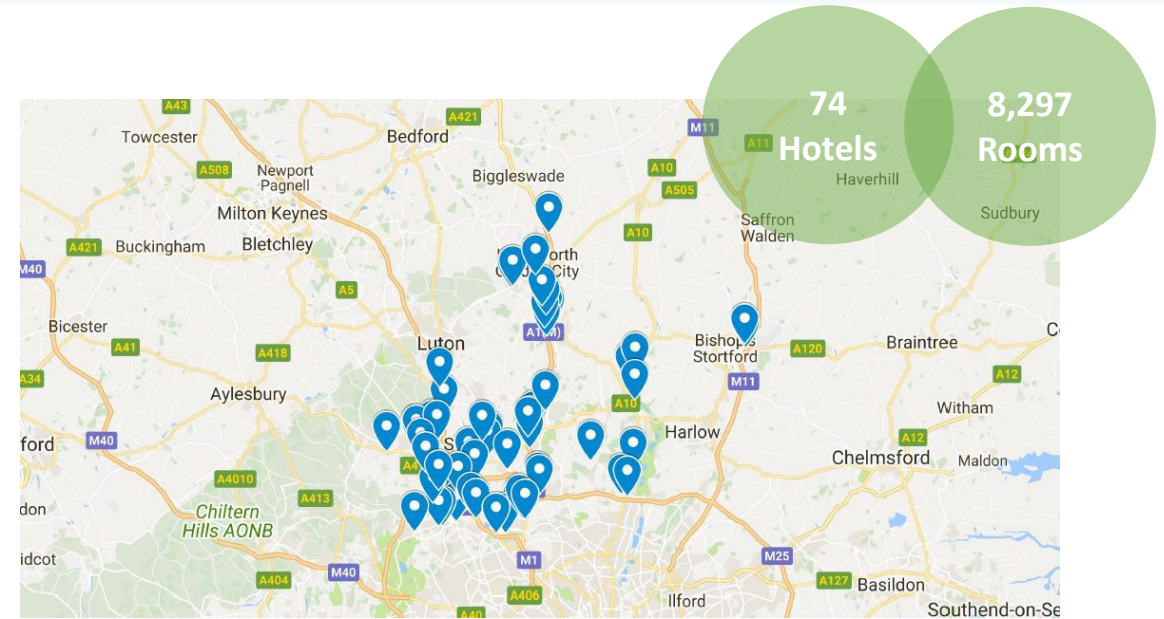
- According to figures from STR Global for **74** larger and chain hotels, in May 2019 Hertfordshire accommodation providers experienced an average occupancy of **77.6%**.
- Hertfordshire accommodation providers experienced a decrease of **-0.2%** in room occupancy compared to May 2018.
- Revenue per available room was down **-0.8%** and average daily rate also saw a decrease of **-0.6%** compared to May 2018.
- Looking at the latest visitor numbers for England, the decrease in domestic overnight visits between January and March (**-8.9%**), alongside a **-1%** decrease in inbound visits over the same period, could have contributed to the decrease in occupancy.

Year on year room occupancy comparison (%)

Hertfordshire	May 2018	May 2019	May 18/19
Occupancy	77.8%	77.6%	-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%	77.6%	-
	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.

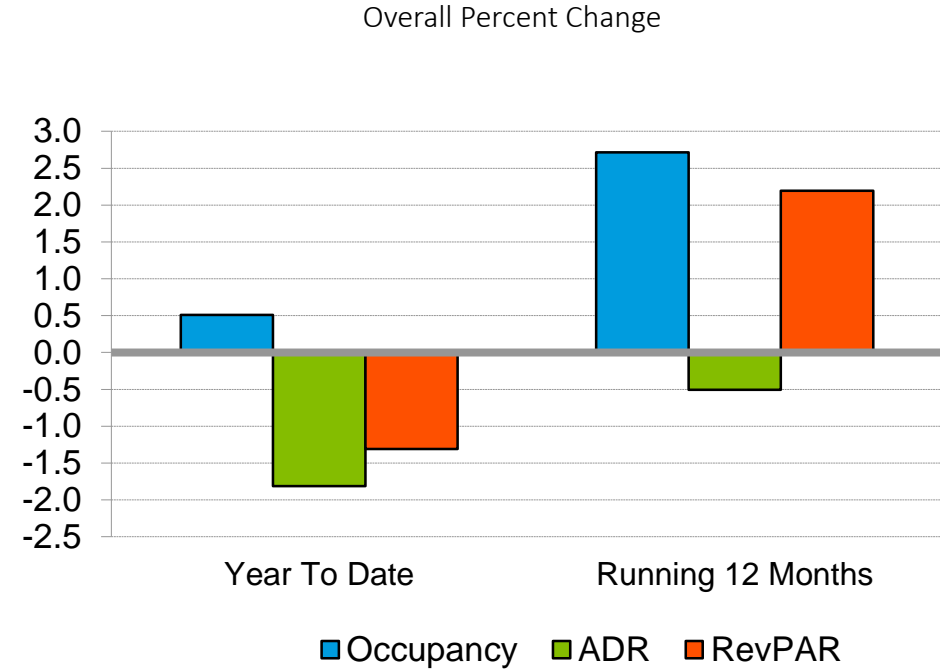


Year on year ADR comparison (%)

Hertfordshire	May 2018	May 2019	May 18/19
ADR	£70.25	£69.81	-0.6%

Year on year RevPAR comparison (%)

Hertfordshire	May 2018	May 2019	May 18/19
RevPAR	£54.62	£54.17	-0.8%



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	May 2018	May 2019	May 18/19
Supply	315,239	317,936	+0.9%

Year on year average demand comparison (%)

Hertfordshire	May 2018	May 2019	May 18/19
Demand	224,115	246,683	+0.6%



Image credit: Champneys



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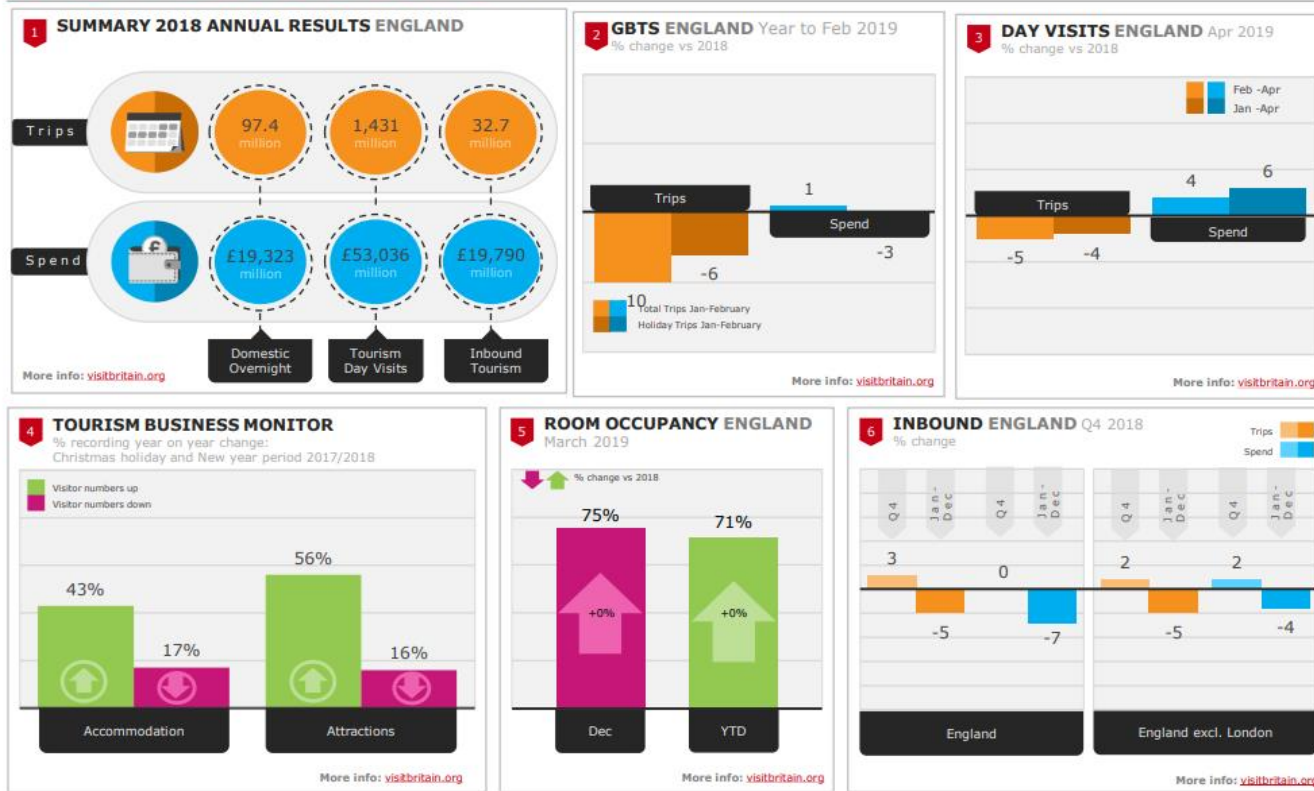


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Other News



LATEST TRENDS DASHBOARD Updated 10th June 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: England Occupancy survey April 2019

- Room occupancy in April decreased by -1% to 76% whereas bedspace occupancy, at 56%, remained level compared to April 2018. In April 2019 there was an increase of +2.3% in room supply and an increase of +1.3% 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, decreased by -1% in April compared to the previous year at £70.05. City/large town room occupancy fell by -1% to 77% whilst bedspace occupancy remained level at 55%. Seaside room occupancy increased +2% from 2018, to 79%, bedspace occupancy increased by +3% to 63%.
- Small town room occupancy remained unchanged at 73%, bedspace occupancy increased by +1%, to 54%. Countryside room occupancy remained unchanged at 67% and bedspace occupancy increased by +1%, to 48%.
- Looking at occupancy rates by establishment size, establishments with 1 - 25 and those with 26 -50 rooms showed greatest percentage increase in room occupancy, both increasing by +1% to 72% and 75% respectively compared to April 2018 and both increasing bedspace occupancy by +1% to 54% and 55% . Establishments with 51 - 100 rooms maintained a similar level of occupancy compared to the same period 2018 at 75%, whilst increasing in bedspace occupancy by +1%, to 57%. Establishments with over 101 rooms saw a decline of -1% in room occupancy to 77%, whilst showing no change in bed space occupancy at 56%.
- Looking at occupancy rates by region, the biggest increase came from Yorkshire & Humberside, increasing room occupancy by +2% to 75%, with a +2% increase in bedspace occupancy. Room occupancy remained level for North East England, East England, Southeast England and the Southwest of England. All other regions decreased in room occupancy in April 2019, ranging from a -1% to -3% fall compared to April 2018.

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



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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





Share the Story

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, May 2019. Thank you.



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