



VISIT HERTS BUSINESS BAROMETER

June 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 using a short online survey, sent out on a monthly basis, with questions centred on visitor footfall for that 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 June 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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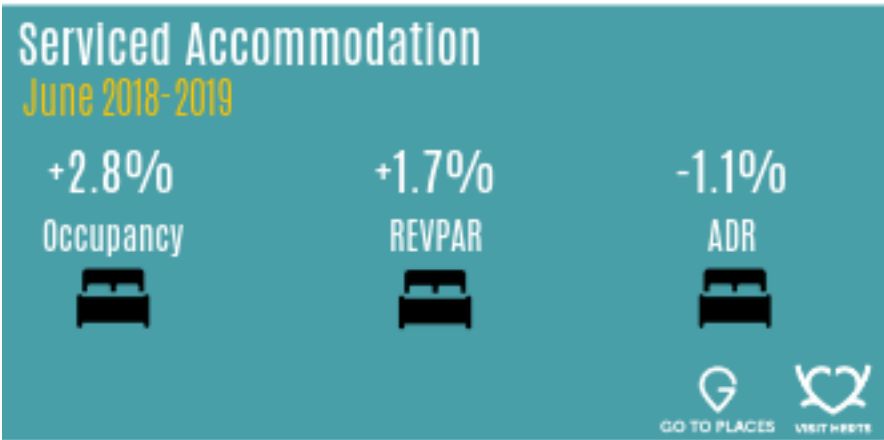
Key Findings

Hertfordshire's visitor economy performance

Visit Herts Business Barometer

In June 2019, tourism businesses saw...

June 2019



- In June 2019, Hertfordshire attractions experienced a decrease of **-14.5%** in visitor footfall, compared to June 2018. Factors cited to have negatively influenced attractions' performance largely included, poorer weather conditions compared to the good weather experienced in June 2018. In addition to this, particular attractions had a larger number of visitors in June 2018 due to special events.
- Looking at figures on a national level, in quarter two the volume of day visits to England decreased by **-3%**, compared with the same quartering 2018. Furthermore, these results illustrate that Hertfordshire is experiencing a similar performance. Alongside this, visits by UK residents to Europe overall were up **+3%** between January-March 2019, compared to the same period in 2018
- Serviced accommodation providers saw an increase of **+2.8%** in room occupancy compared to June 2018.
- During June 2019, on average, **84%** of visitors to attractions that completed the Barometer were domestic, **2%** were long haul and **4%** were European. Out of all the overseas visitors, **44%** of attractions reported guests from the USA as being their most prevalent market, in addition to **33%** from France.



Visit Herts Team Update: Digital statistics

June 2019

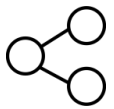


Website

11,483 sessions

32,375 pages views

1:39 minutes average dwell time



Social Media



2,275 followers



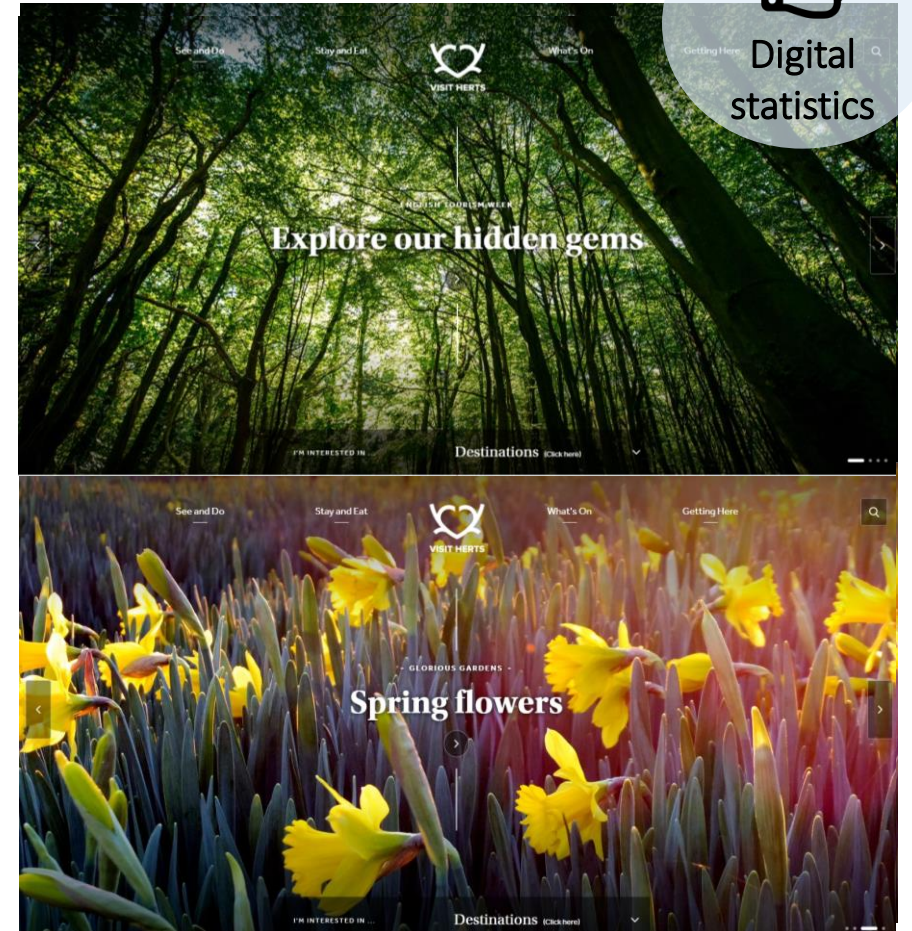
1,542 followers



1,819 followers



Digital statistics



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Visit Herts Team Update: Travel Trade

June 2019: Travel Trade

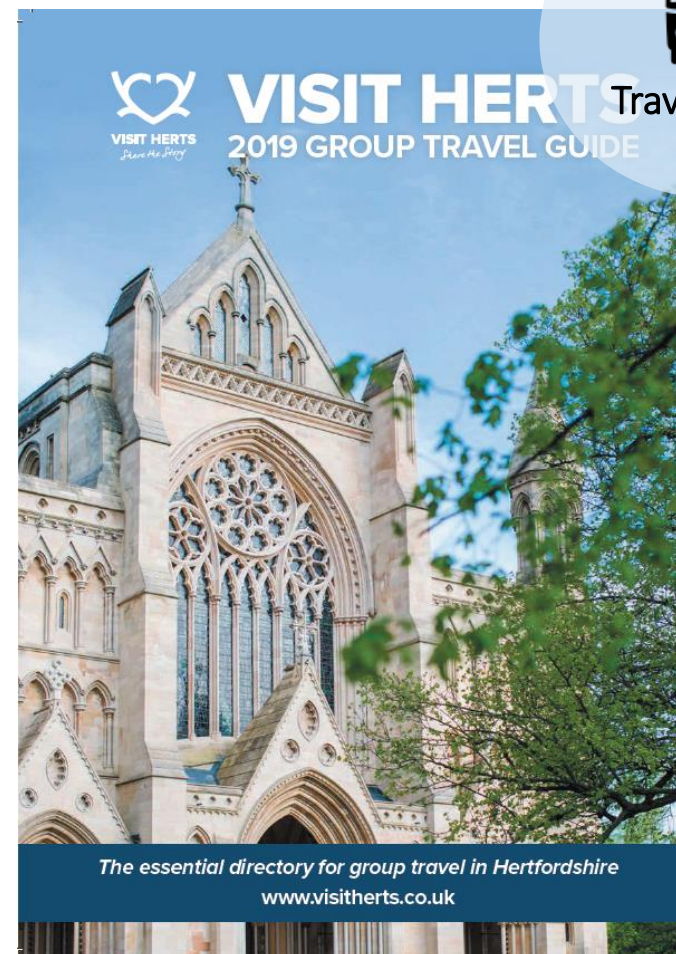
In June, we were thrilled to host AC Tours' Head of Product Development and Contracting in Hertfordshire. This activity all took place as part of the Gourmet Garden Trails project, where we are encouraging the travel trade to feature more of our gourmet and garden experiences in the county to clients. The trip took in St Albans, Brocket Hall, Knebworth and much more. We expect a brand-new programme to be offered in Hertfordshire from them in the next year.

The team also spoke at a UKinbound New Members Masterclass, presented the new trade strategy at the summer networking event as well as made several new contacts that have been added to the trade database.

We were also delighted to attend the UKinbound Summer Ball, hosting tour operator colleagues working in the US, French and Spanish markets.



Travel Trade



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Visitor Attractions





Visitor Attractions: Monthly performance

Visitor numbers June 2018/2019

2018	2019	% change
109,246	93,366	-14.5%

Range of performance June 2018/2019

Attractions up	Attractions down
54.5%	45.5%

Performance according to cost June 2018/2019

Charging	Free
-6.7%	-24%

Performance according to attraction location June 2018/2019

Urban	Rural
	
-27.7%	-3.1%





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	74,455	75,564	+1.5%	290,214	364,720	+25.7%
June	109,246	93,366	-14.5%	399,460	458,086	+14.7%
July						
August						
September						
October						
November						
December						
June*	109,246	118,087	+8.1%	399,460	482,807	+20.9%

**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 marketing and publicity compared to June 2018.



The wet weather in early June 2018 brought in more visitors to particular attractions.

Negative



The wet weather however also negatively impacted other attractions, with better weather conditions experienced in June 2018.



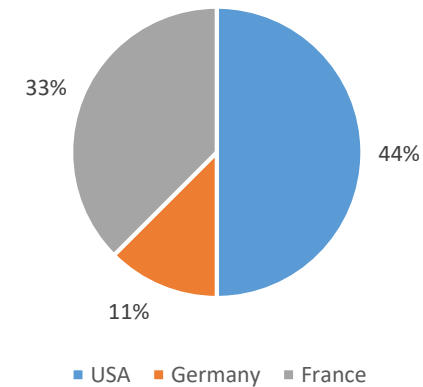
In June 2018 particular attractions opened which resulted in a larger number of visitors compared to June this year.



Origin of visitors to attractions

- During June 2019, on average, **84%** of visitors to attractions that completed the Barometer were domestic, **2%** were long haul and **4%** were European.
- Out of all the overseas visitors, **44%** of attractions reported guests from the USA as being their most prevalent market, in addition to **33%** from France.

Most prevalent overseas markets to Hertfordshire Visitor Attractions- June 2019



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



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Hertfordshire Accommodation





Serviced Accommodation



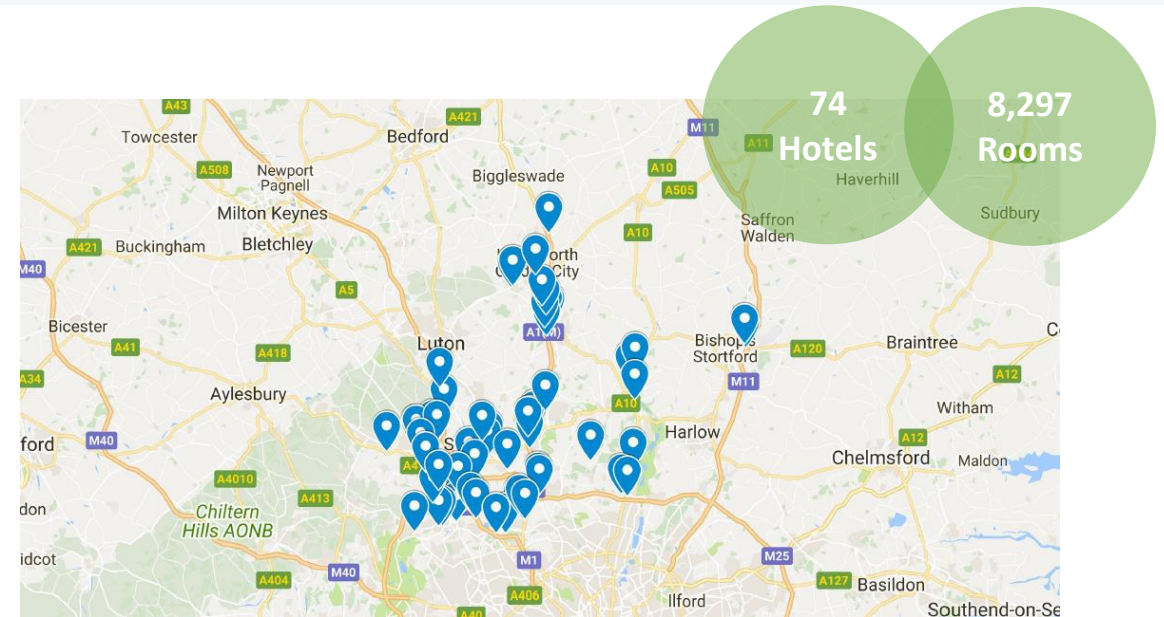
- According to figures from STR Global for **74** larger and chain hotels, in June 2019 Hertfordshire accommodation providers experienced an average occupancy of **81.5%**.
- Hertfordshire accommodation providers experienced an increase of **+2.8%** in room occupancy compared to June 2018.
- Revenue per available room saw an increase of **+1.7%**, however the average daily rate saw a decrease of **-1.1%** compared to June 2018.

Year on year room occupancy comparison (%)

Hertfordshire	June 2018	June 2019	June 18/19
Occupancy	79.2%	81.5%	+2.8%

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%	81.5%
	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.

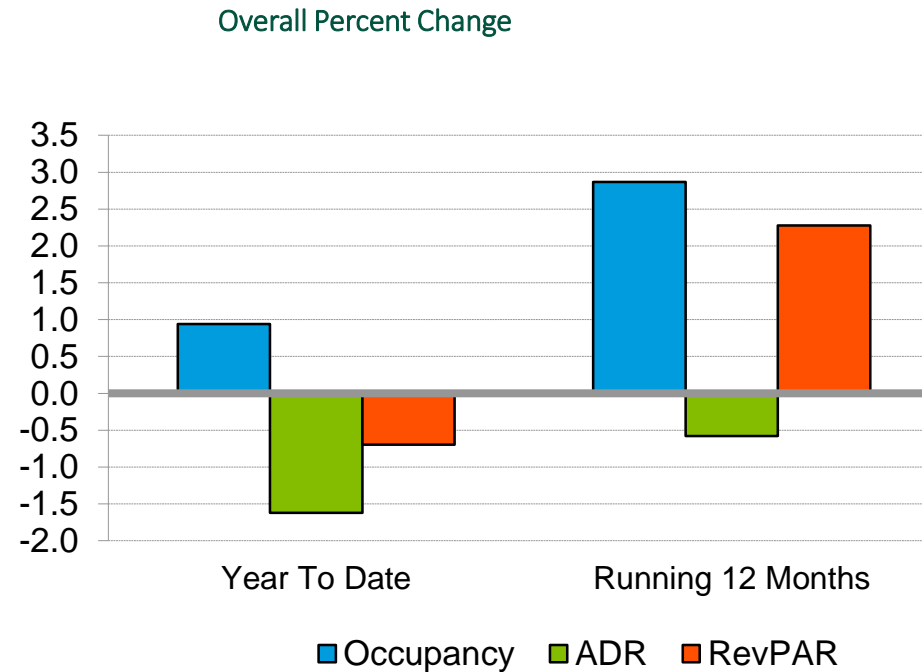


Year on year ADR comparison (%)

Hertfordshire	June 2018	June 2019	June 18/19
ADR	£73.59	£72.80	-1.1%

Year on year RevPAR comparison (%)

Hertfordshire	June 2018	June 2019	June 18/19
RevPAR	£58.30	£59.30	+1.7%



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	June 2018	June 2019	June18/19
Supply	305,220	309,870	+1.5%

Year on year average demand comparison (%)

Hertfordshire	June 2018	June 2019	June 18/19
Demand	241,781	252,394	+4.4%

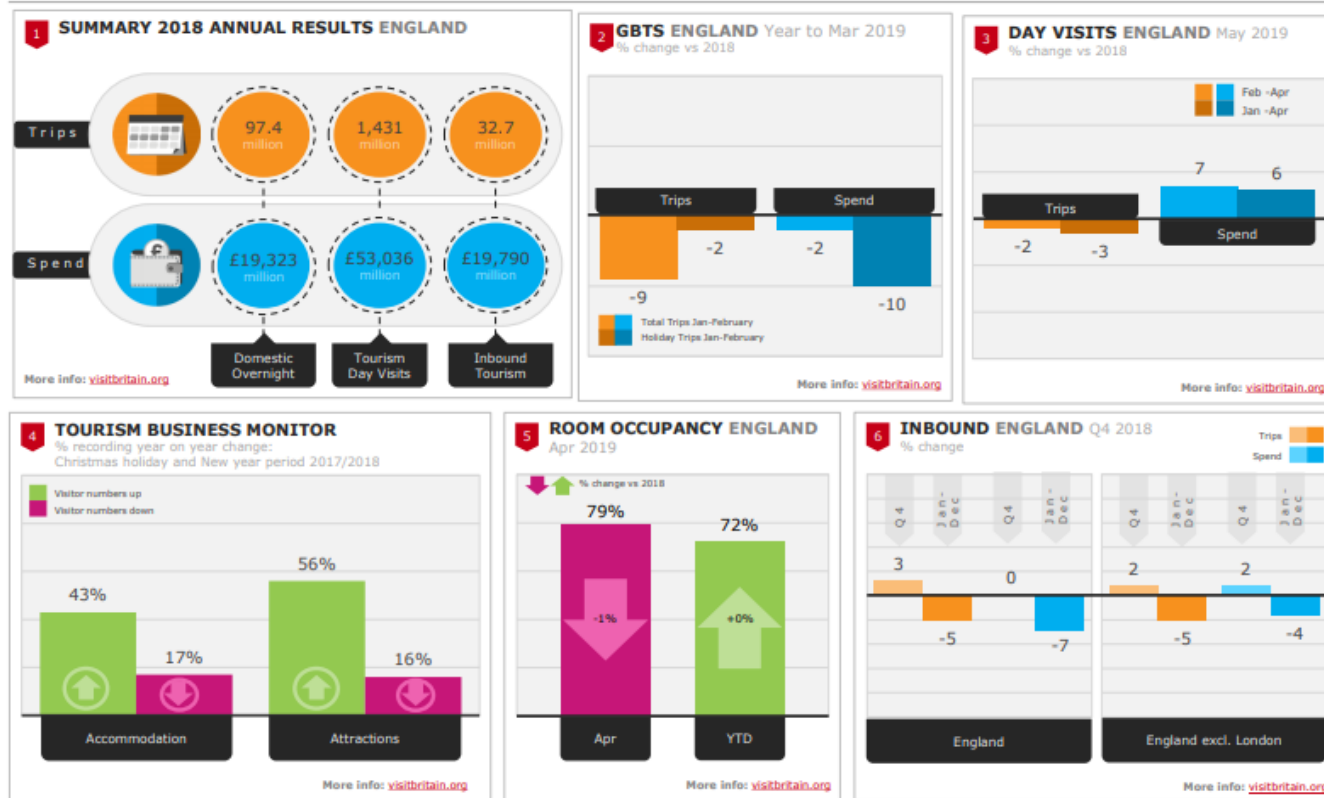


Image credit: Champneys

Other News: National results



LATEST TRENDS DASHBOARD Updated 24th July 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 Survey June 2019

Summary of Results

- The volume of day visits in Great Britain in the three months to June 2019 decreased by -4% when compared with the same period last year, to 429 million.
- In contrast, the value of those visits increased by +3% when compared to the previous year at £16.3 billion.
- Year to date at the GB level volume decreased by -5% to 786 million and the value of visits increased by +1% to £29.9 billion.
- Looking at England, volume decreased by -3% in the three months to June 2019 at 364 million visits, whilst value increased by +5% to £13.8 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 667 million and the value increased by +3% compared to the same period in 2018 to £25.3 billion.

- 3+ hour day visits in Great Britain for the three months to June 2019 decreased by -3% compared to the same period in 2018 to 705 million visits.
- However, the value of these visits increased by +15% for the three months against the same period last year to £24.9 billion.
- Year to date, volume is down by -4% to 1.3 billion 3+ hour visits whereas value increased by +2% to £43.9 billion.
- In England, volume declined by -3% in the three months prior to June 2019 to 592 million. The value of these visits increased by +14%, to 20.6 billion.
- Year to date the volume of day visits in England decreased relative to the same period in 2018 by -4%, to 1.1 billion while the value increased by +2% to £36.7 billion.

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





VisitEngland: England Occupancy survey May 2019

Summary of Results

- Room occupancy in May remained level at 79%, bedspace occupancy also remained level compared to May 2018 at 57%. In May 2019, there was an increase of +2.2% in room supply and an increase of +1.7% 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, remained level in May compared to the previous year at £75.48. Seaside room occupancy increased +1% from 2018 to 81%, bedspace occupancy increased by +2% to 62%.
- Countryside room occupancy increased by +1% to 74% and bedspace occupancy increased by +2% to 52%. Small town room occupancy and bed occupancy remained unchanged at 77% & 56%. City/large town room occupancy remained level, at 79%. Bedspace occupancy also remained level at 56%.
- Looking at occupancy rates by establishment size, establishments with 1-25 rooms showed the greatest percentage increase in room occupancy, increasing by +1% to 76% compared to May 2018 and increasing bedspace occupancy by +1% to 56%. Rooms with 26-50 rooms showed no change in room occupancy at 77%, or in bedspace occupancy, remaining at 56%. Establishments with 51-100 rooms also showed no change in room occupancy remaining level at 78%, there was no change in bedspace occupancy at 58%. Establishments with 101+ rooms showed a decline of -1% in room occupancy to 79% and remained level for bedspace occupancy at 57%.
- Looking at occupancy rates by region, increases were seen in Yorkshire & Humberside, Northeast England and Northwest England, all increasing in room occupancy by +1% compared to the same period 2018 to 76%, 74% & 78% respectively. These regions also rose +1% in bedspace occupancy to 53%, 55% & 56%. Room occupancy remained level in the Southwest and the east of England. All other regions saw a decline in room occupancy from between -1% to -2%.

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



Contact us

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

Ruby Russ

ruby.russ@visitherts.co.uk

01227 812916

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, June 2019. Thank you.



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