VISIT HERTS

BUSINESS BAROMETER

July 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 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.

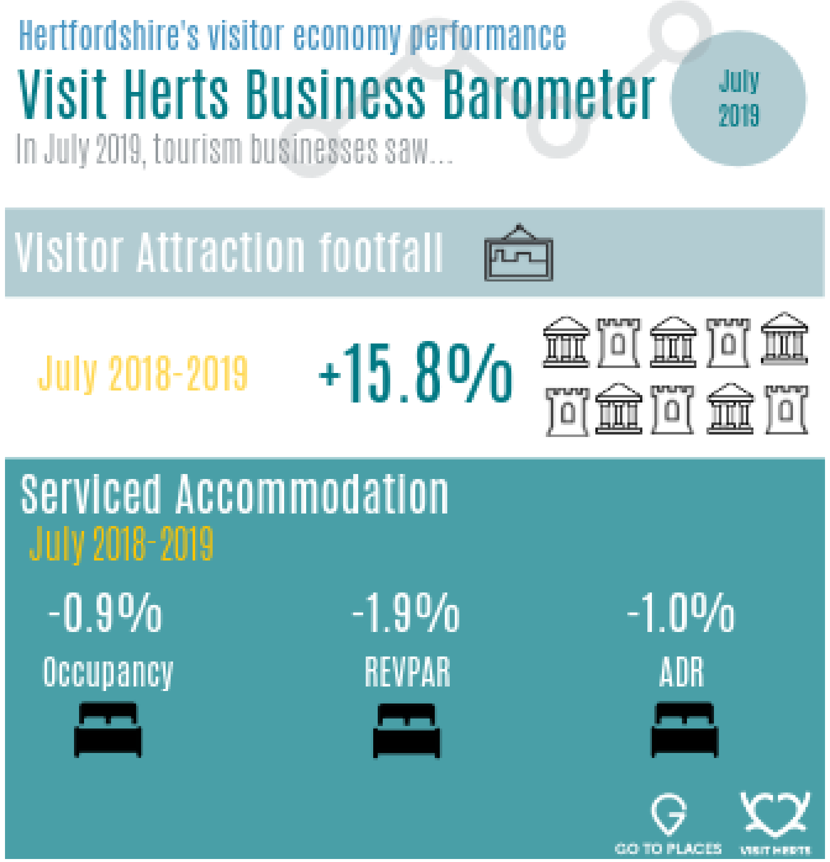
This report summarises findings from July 2019, looking at the performance of tourism businesses and giving a snapshot of Hertfordshire's visitor economy in comparison to the same time the previous year. Alongside this, the report will also benchmark against national level figures where possible.

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



- In July 2019, Hertfordshire attractions experienced an increase of **+15.8%** in visitor footfall, compared to July 2018. Factors cited to have positively impacted performance included an increase in membership visits and well attended events and exhibitions compared to July 2018.

- Serviced accommodation providers saw a slight decrease of **-0.9%** in room occupancy compared to July 2018.

- During July 2019, on average, **82%** of visitors to attractions that completed the Barometer were domestic, **3%** were long haul and **6%** were European. Out of all the overseas visitors, **63%** of attractions reported guests from France as being their most prevalent market.

Visit Herts Team Update: Digital statistics

July 2019

Digital statistics

Website

14,277 sessions

39,587 pages views

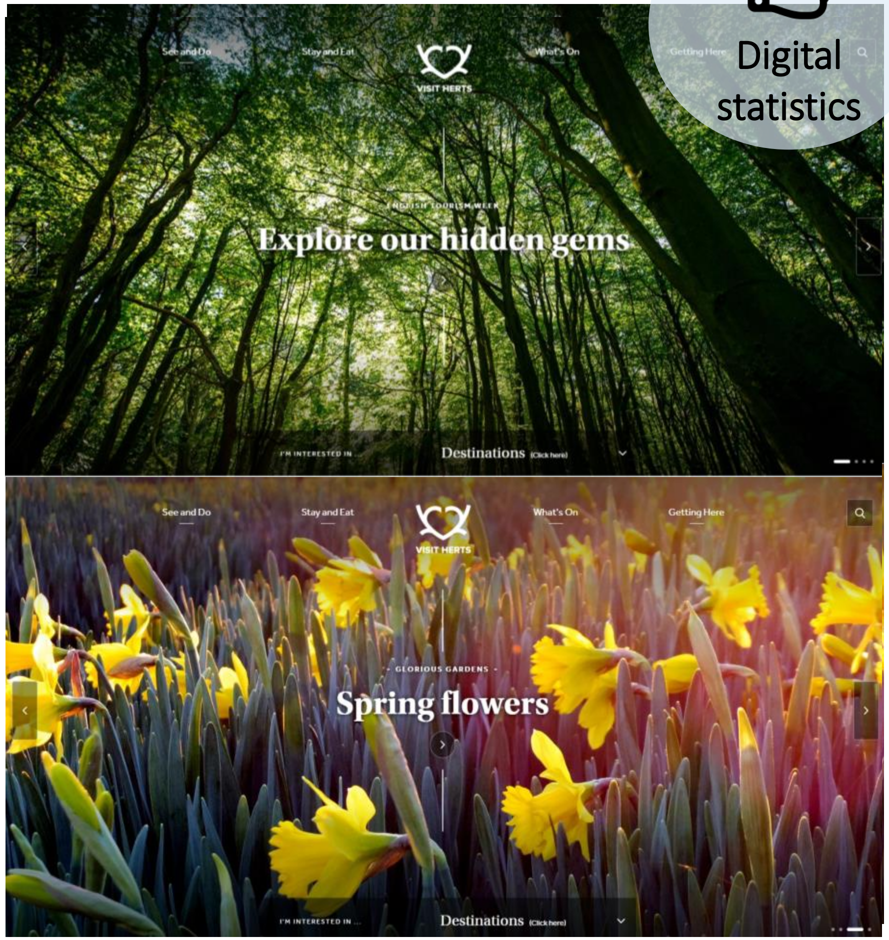
1:36 minutes average dwell time

Social Media

2,314 followers

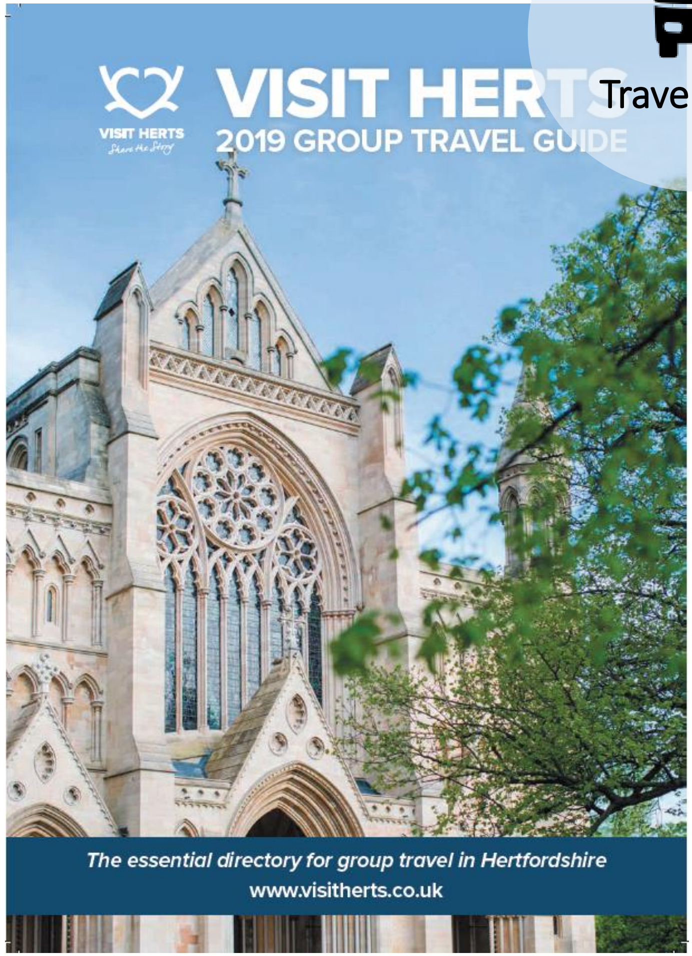
1,597 followers

1,892 followers



Visit Herts Team Update: Travel Trade

Travel Trade



July 2019: Travel Trade

With operators busy at the start of the key summer season, the trade team spent much of this month planning winter activity and confirming plans and partnerships for later in the year. Ongoing work continued with activity in the Discover England Fund projects, including catch ups with both the Germany and Netherlands in-market representatives regarding upcoming fam trips taking place in the Autumn. The team also started working on the new Visit Herts online trade hub, a new digital resource for the travel trade, due to be published in the early Autumn.

Visitor Attractions

Visitor Attractions: Monthly performance

Visitor numbers July 2018/2019

2018	2019	% change
90,644	104,940	+15.8%

Range of performance July 2018/2019

Attractions up	Attractions down
64.0%	36.0%

Performance according to cost July 2018/2019

Charging	Free
+4.7%	+47.1%

Performance according to attraction location July 2018/2019

Urban	Rural
+38.6%	+6.2%

Factors influencing visitor attractions' performance

Positive

Increase in the number of membership visits.

New exhibitions brought in additional visitor footfall.

Negative

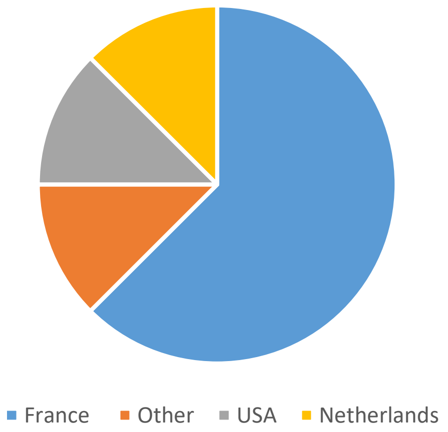
Weather negatively impacted particular attractions.

Decrease in the number of group visits.

Origin of visitors to attractions

- During July 2019, on average, **82%** of visitors to attractions that completed the Barometer were domestic, **3%** were long haul and **6%** were European.
- Out of all the overseas visitors, **63%** of attractions reported guests from France as being their most prevalent market.

Most prevalent overseas markets to visitor attractions



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

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	90,644	104,940	+15.8%	490,104	563,026	+14.9%
August						
September						
October						
November						
December						
July*	**90,644**	133,940	+47.8%	**490,104**	616,747	+25.8%

**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.*

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **74** larger and chain hotels, in July 2019 Hertfordshire accommodation providers experienced an average occupancy of **83.6%.**
- Hertfordshire accommodation providers experienced a decrease of **-0.9%** in room occupancy compared to July 2018.
- Revenue per available room saw a decrease of **-1.9%**, with average daily rate also experiencing a slight decrease of **-1.0%** compared to July 2018.

Year on year room occupancy comparison (%)

Hertfordshire	July 2018	**July 2019**	**July 18/19**
Occupancy	**84.4%**	**83.6%**	**-0.9%**

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	**83.6%**	--	-	-	-	-

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

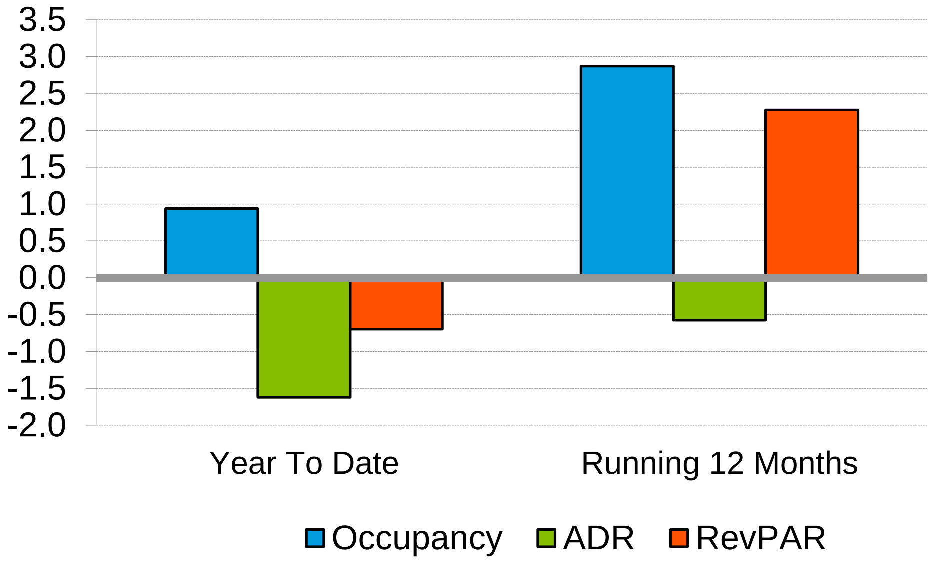
Year on year ADR comparison (%)

Hertfordshire	July 2018	July 2019	July 18/19
ADR	**£73.47**	**£72.72**	**-1.0%**

Year on year RevPAR comparison (%)

Hertfordshire	July 2018	July 2019	July 18/19
RevPAR	**£61.99**	**£60.82**	**-1.9%**

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.

Serviced Accommodation

Year on year average supply comparison (%)

Hertfordshire	July 2018	July 2019	July 18/19
Supply	315,394	320,199	+1.5%

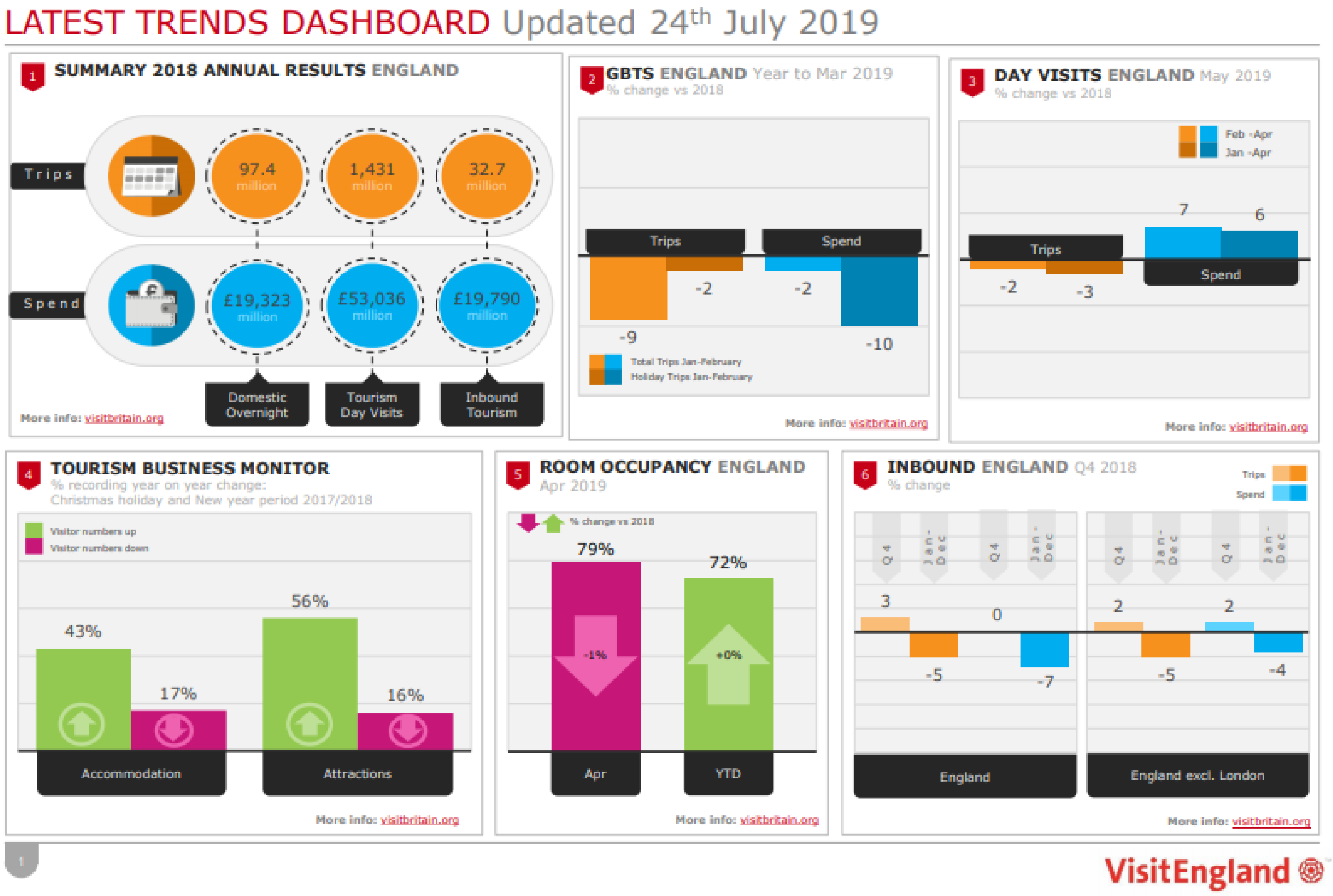
Year on year average demand comparison (%)

Hertfordshire	July 2018	July 2019	July 18/19
Demand	266,106	267,808	+0.6%

Image credit: Champneys

Other News: National results

Other News



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

National picture

GB Day Visits Survey July 2019

Summary of Results

- The volume of day visits in Great Britain in the three months prior to July 2019 decreased by -1% compared to the same period last year, at 443 million
- However, the value of those visits increased by +8% to £16 billion compared to the same period in 2018.
- Year to date at the GB level, volume decreased by -3% to 942 million whilst the value of visits increased by +4% to £36 billion over the same time period.
- Looking at England, the volume of visits decreased by -2% to 369 million visits in the three months prior to July 2019, whilst value increased by +6% to £13.6 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 -3% to 796 million, whereas the value increased by +6% to £30.3 billion compared to 2018.

- 3+ hour day visits in Great Britain for the three months prior to July 2019 decreased by -3% at 723 million visits when compared to the same period in 2018.
- However, the value of these visits increased by +12% to £24 billion compared to the same period last year.
- Year to date, volume is down by -4% to 1.6 billion but value increased by +4% to £52 billion.
- In England, volume decreased by -4% to 600 million compared to May – July 2018 whilst value increased by +12% to 19.9 billion over the same time period
- Year to date the volume of day visits in England decreased by -4% relative to the same period in 2018 to 1.3 billion. The value of these visits however increased by +4% to £44 billion.

To view the full report click here

VisitEngland®

Other News

VisitEngland: England Occupancy survey June 2019

Summary of Results

- Room occupancy increased by +1% in June to 84%, bedspace occupancy remained level compared to June 2018 at 58%. In June 2019, there was an increase of +2.3% in room supply and an increase of +3.9% 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 +8% in June compared to the previous year at £91.23. Countryside room occupancy increased by +2% to 77% and bedspace occupancy increased by +1% to 52%.
- Small town room occupancy has shown an increase of +1% at 81%, whilst bedspace occupancy has remained level at 58%. City/large town room occupancy has increased by +1% to 84%, bedspace occupancy remained level at 58%. Seaside room occupancy saw a decline of -1% from 2018 to 82%, bedspace occupancy also decreased by -2% to 59%.
- Looking at occupancy rates by establishment size, room occupancy increased by +1% across establishments of all measured sizes. Rooms with 101+ increased to 84%, while bedspace also increased +1% to 59%. Establishments with 51-100 rooms, with room occupancy at 81%, remained at a level 59% bedspace occupancy. Establishments with 26-50 rooms, with room occupancy at 81%, saw a -1% decline in bedspace occupancy to 57%. Establishments with 1-25 rooms, with room occupancy at 80%, remained at a level rate of bedspace occupancy compared to the same period in 2018 at 57%.
- Looking at room occupancy by region, the greatest increase was seen in greater London, up +4% to 90% whilst bedspace occupancy increased by +1% to 63%. Southwest England, Yorkshire & Humberside, East Midlands and West Midlands all increased in room occupancy by +1% compared to the same period in 2018 to 84%, 79%, 78% & 78% respectively. These regions all remained at level bedspace occupancy 58%, 56%, 54% & 52%. All other regions remained at level room occupancy to the same period 2018, except for Northeast England which declined by -1%.

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

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, July 2019. Thank you.

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