VISIT HERTS
BUSINESS BAROMETER

August 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.

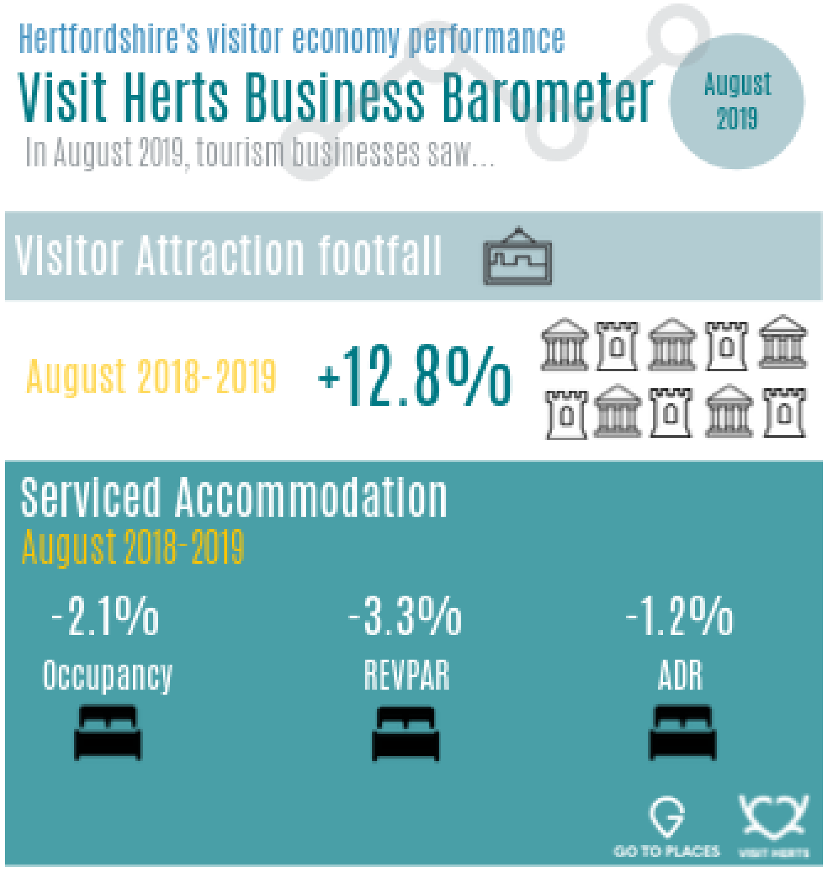
This report summarises findings from August 2019, looking at the performance of tourism businesses and giving a snapshot of Hertfordshire's visitor economy in comparison to the same time the previous year. Alongside this, the report will also benchmark against national level figures where possible.

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 August 2019, Hertfordshire attractions experienced an increase of **+12.8%** in visitor footfall, compared to August 2018. Factors cited to have positively impacted performance included an increase in footfall to events over the bank holiday weekend compared to August 2018, alongside larger exhibitions hosted.

- Serviced accommodation providers saw a decrease of **-2.1%** in room occupancy compared to August 2018.

- During August 2019, on average, **88%** of visitors to attractions that completed the Barometer were domestic, **3%** were long haul and **9%** were European. Out of all the overseas visitors, **44%** of attractions reported guests from France as being their most prevalent market.

Visit Herts Team Update: Digital statistics

August 2019

Website

18,279 sessions

50,417 pages views

1:30 minutes average dwell time

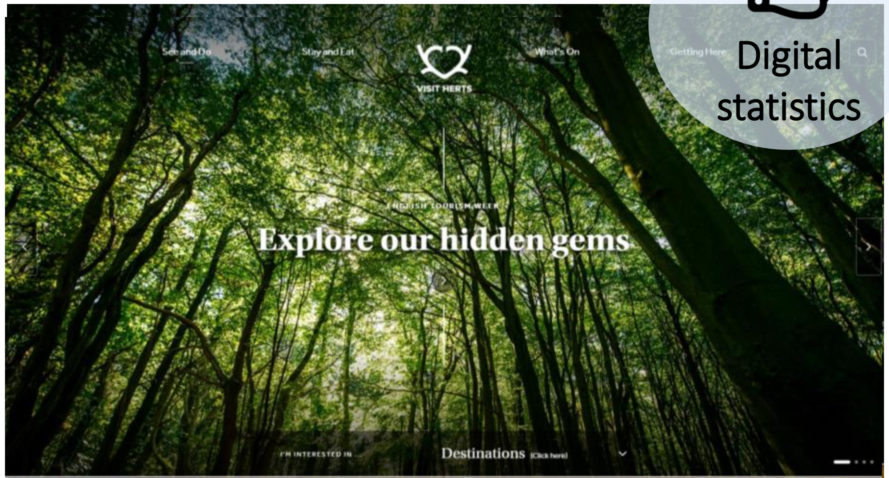
Social Media

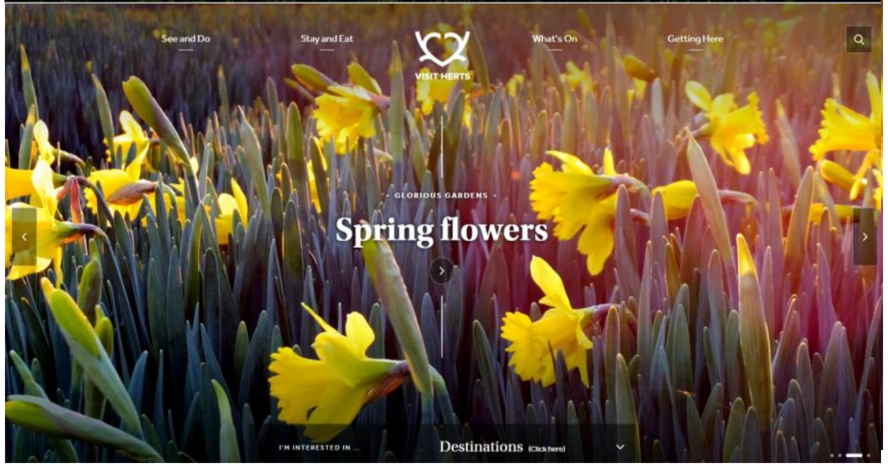
2,335 followers

1,617 followers

1,953 followers

Digital statistics



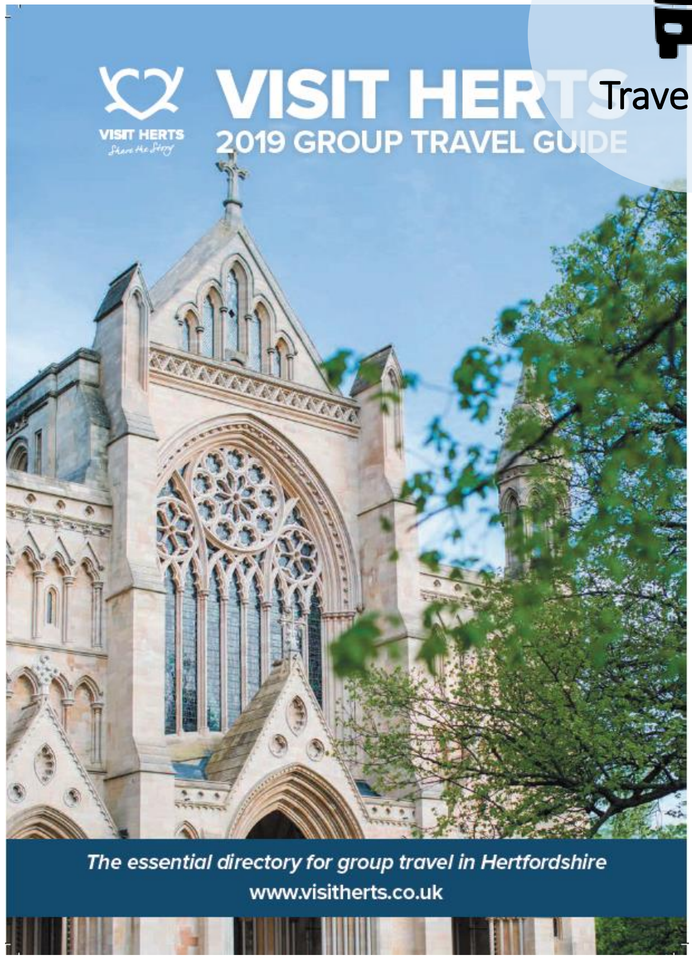


Visit Herts Team Update: Travel Trade

Travel Trade

August 2019: Travel Trade

With August being a busy month for operators who are selling and running their trips, this month was spent planning ahead for the busy trade show season from October to March. Preparations were made for a Visit Herts presence at the Group Travel & Leisure Show in early October, as well as looking further ahead at shows in 2020. The team also worked heavily on a large familiarisation trip for a Dutch tour operator, who will be bringing group organiser clients to experience Hertfordshire and all of its garden attractions, as part of the Discover England fund project Gourmet Garden Trails.



Visitor Attractions

Visitor Attractions: Monthly performance

Visitor numbers August 2018/2019

2018	2019	% change
137,783	155,351	+12.8%

Range of performance August 2018/2019

Attractions up	Attractions down
70%	30%

Performance according to cost August 2018/2019

Charging	Free
+8.1%	+23.5%

Performance according to attraction location August 2018/2019

Urban	Rural
+19.5%	+10.6%

Factors influencing visitor attractions' performance

Positive

Increased footfall to events over the bank holiday weekend, compared to August 2018.

New exhibitions brought in additional visitor footfall.

Negative

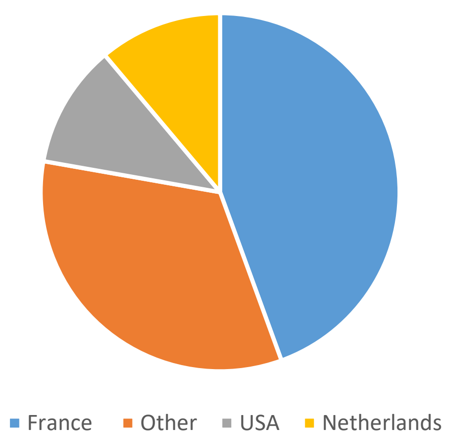
Mixed weather negatively impacted particular attractions.

Decrease in the number visitors due to enhanced offering and marketing activity in August 2018.

Origin of visitors to attractions

- During August 2019, on average, **88%** of visitors to attractions that completed the Barometer were domestic, **3%** were long haul and **9%** were European.
- Out of all the overseas visitors, **44%** of attractions reported guests from France as being their most prevalent market.

Most prevalent overseas markets to Hertfordshire visitor attractions



Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in August 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	137,783	155,351	+12.8%	627,887	718,377	+14.4%
September						
October						
November						
December						
August*	137,783	155,351	+12.8%	627,887	772,098	+22.9%

**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.*

Hertfordshire Accommodation

Serviced Accommodation

- According to figures from STR Global for **74** larger and chain hotels, in August 2019 Hertfordshire accommodation providers experienced an average occupancy of **77.4%.**
- Hertfordshire accommodation providers experienced a decrease of **-2.1%** in room occupancy compared to August 2018.
- Revenue per available room saw a decrease of **-3.3%**, with average daily rate also experiencing a slight decrease of **-1.2%** compared to August 2018.

Year on year room occupancy comparison (%)

Hertfordshire	August 2018	August 2019	August 18/19
Occupancy	79.1%	77.4%	-2.1%

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%	77.4%	-	-	-	-

74 Hotels

8,297 Rooms

Map showing the locations of serviced accommodation providers that contribute monthly to the Hertfordshire Business Barometer through STR Global.

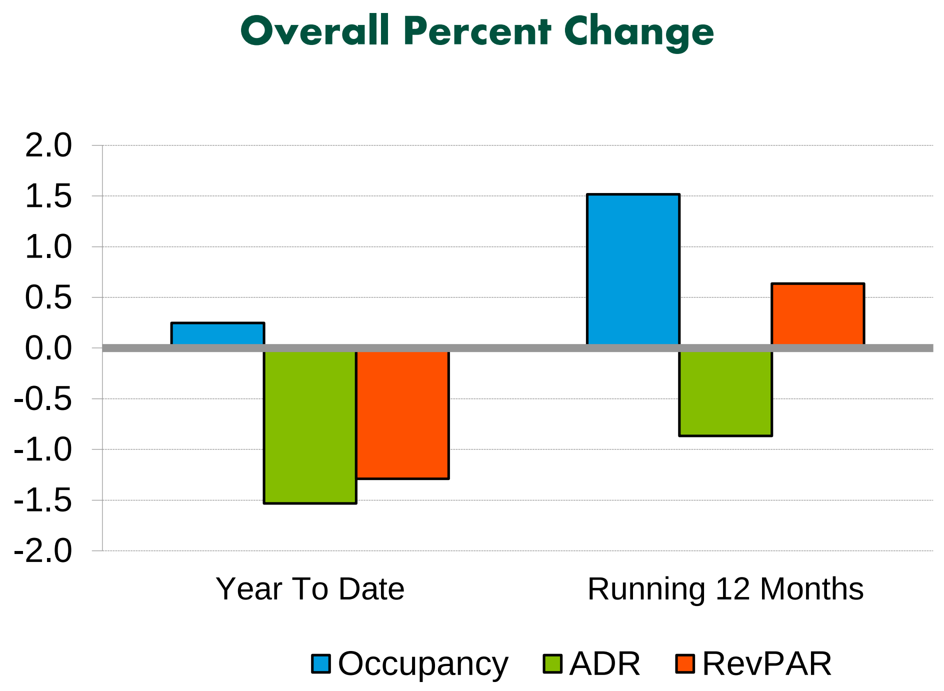
Serviced Accommodation

Year on year ADR comparison (%)

Hertfordshire	August 2018	August 2019	August 18/19
ADR	£66.24	£65.46	-1.2%

Year on year RevPAR comparison (%)

Hertfordshire	August 2018	August 2019	August 18/19
RevPAR	£52.27	£50.66	-3.3%



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	August 2018	August 2019	August18/19
Supply	318,184	320,602	+0.8%

Year on year average demand comparison (%)

Hertfordshire	August 2018	August 2019	August 18/19
Demand	251,568	248,113	-1.4%

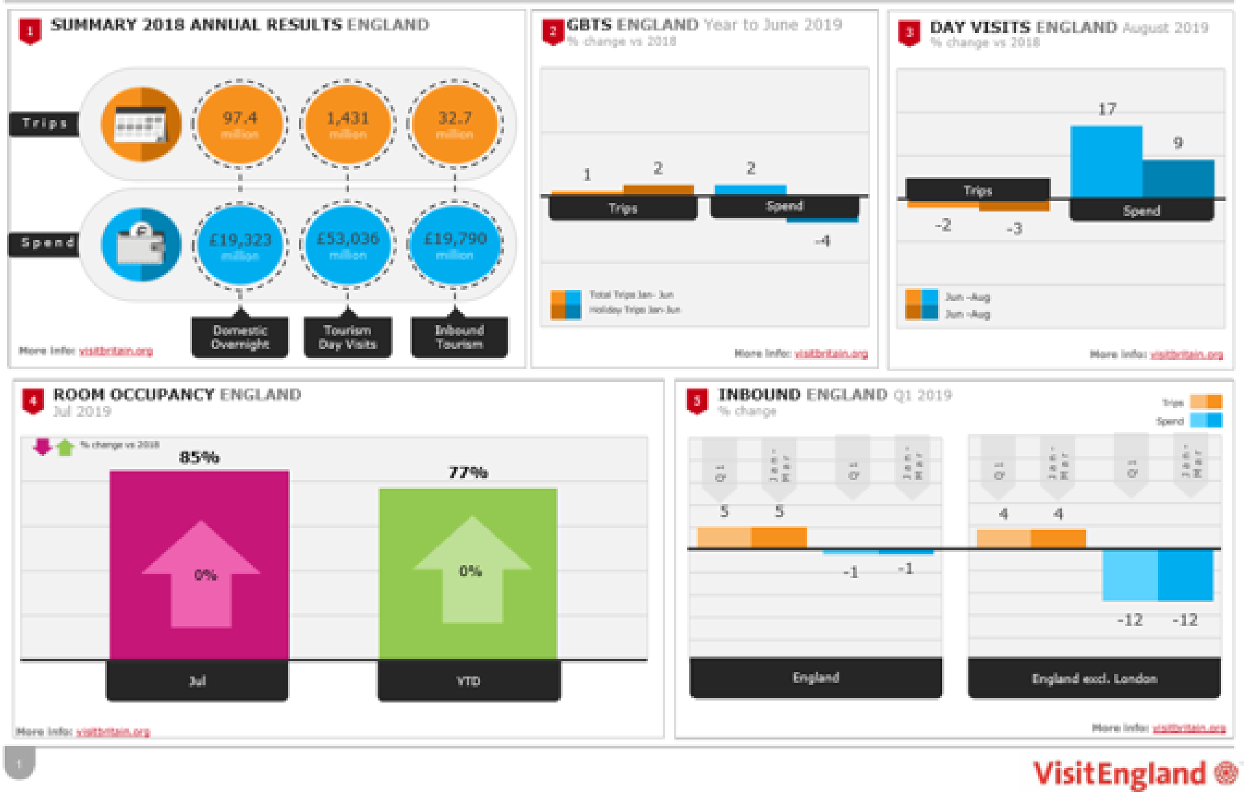
Image credit: Champneys

VISIT HERTS GO TO PLACES

Other News: National results

Other News

LATEST TRENDS DASHBOARD Updated 04th October 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

National picture

GB Day Visits Survey August 2019

Summary of Results

- The volume of day visits in Great Britain in the three months to August 2019 decreased to 463 million, a drop of -1% when compared with the same period last year
- The value of those visits however increased by +15% during the same period to £18.4 billion
- Year to date at the GB level, volume decreased by -3% to 1.1 billion but the value of visits increased by +7% to £43.6 billion when compared to the same period in 2018
- Looking at England, volume decreased by -2% to 384 million visits in the three months to August, while value increased by +17% to £15.7 billion compared to the same period in 2018
- Year to date the volume of day visits in England decreased by -3% to 938 million when compared to 2018. Value however increased by +9% to £37.0 billion compared to the same period
- 3+ hour day visits in Great Britain for the three months to August 2019 decreased by -2% to 745 million compared to the same period in 2018
- The value of these visits increased however by +13% to £25.5 billion compared to the same period in 2018
- Year to date, volume is down by -3% to 1.8 billion 3+ hour visits but value increased by +5% to £62.3 billion compared to 2018
- In England, volume declined by -3% to 614 million in the three months to August 2019. However, the value of these visits increased by +15%, to £21.6 billion.
- Year to date the volume of 3+ hour day visits in England decreased relative to the same period in 2018 by -4% to 1.5 billion while the value increased by +6% to £52.2 billion

To view the full report click here

VisitEngland

Other News

VisitEngland: England Occupancy survey July 2019

Summary of Results

- Room occupancy remained level in July at 85%, bedspace occupancy also remained level compared to July 2018 at 60%. In July 2019, there was an increase of +2.3% in room supply and an increase of +2.2% 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 +1% in July compared to the previous year at £91.56.
- Countryside room occupancy increased by +2% to 79% and bedspace occupancy increased by +1% to 54%. Small town room occupancy has shown an increase of +1% at 83%, bedspace increased by +1% to 60%. City/large town room occupancy has remained level at 86%, bedspace occupancy decreased by -1% to 59%. Seaside room occupancy remained level compared to the same month 2018, at 87%, bedspace occupancy decreased by -1% to 65%.
- Looking at occupancy rates by establishment size, establishments with 1 – 25 rooms showed the greatest increase of +2% in room occupancy to 83%, with an increase of +1% in bedspace occupancy in July 2019. All other measured room sizes remained level for room space occupancy. Establishments of 26-50 rooms at 83% room occupancy declined in bedspace occupancy by -1% to 59%. Establishments of 51-100 rooms at 84% room occupancy remained at level bedspace occupancy at 61%, and establishments with over 101 rooms at 86% room occupancy declined in bedspace occupancy by -1% to 60% compared to the same period in 2018.
- Looking at room occupancy by region, the greatest increase was seen in Yorkshire and Humber, up +3% compared to July 2018 to 83%, with bedspace occupancy up +1% to 58%. North East England and the East Midlands increased +2% & +1% to 82% and 79% respectively, while bedspace occupancy also rose by +2% & +1% to 58% and 55%. South West England, East of England, North West England & West Midlands all remained level compared to the same period last year at 87%, 84%, 83% & 77%. South East England and Greater London both saw a decline of -2% and -1% in room occupancy, respectively.

To view the full report click here

VisitEngland

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, August 2019. Thank you.