VISIT HERTS

BUSINESS BAROMETER

September 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.

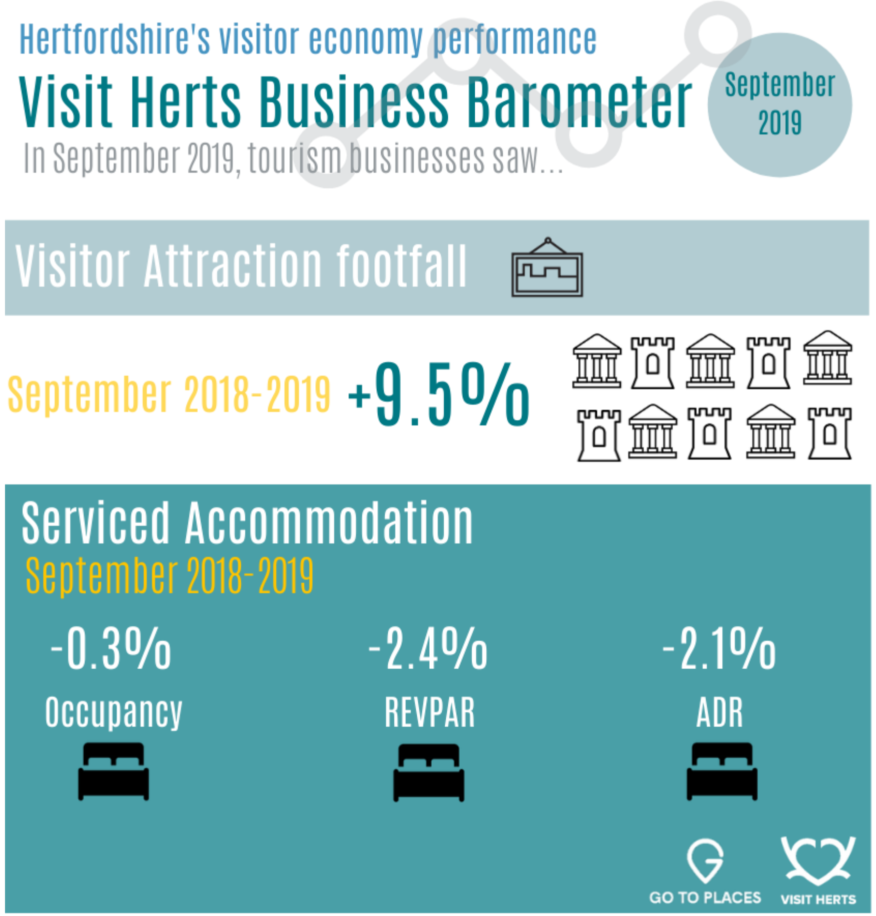
This report summarises findings from September 2019, looking at the performance of tourism businesses and giving a snapshot of Hertfordshire's visitor economy in comparison to the same time the previous year. Alongside this, the report will also benchmark against national level figures where possible.

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 September 2019, Hertfordshire attractions experienced an increase of **+9.5%** in visitor footfall, compared to September 2018. Factors cited to have positively impacted performance included an increase in membership visits and an increase in marketing and promotional activity.

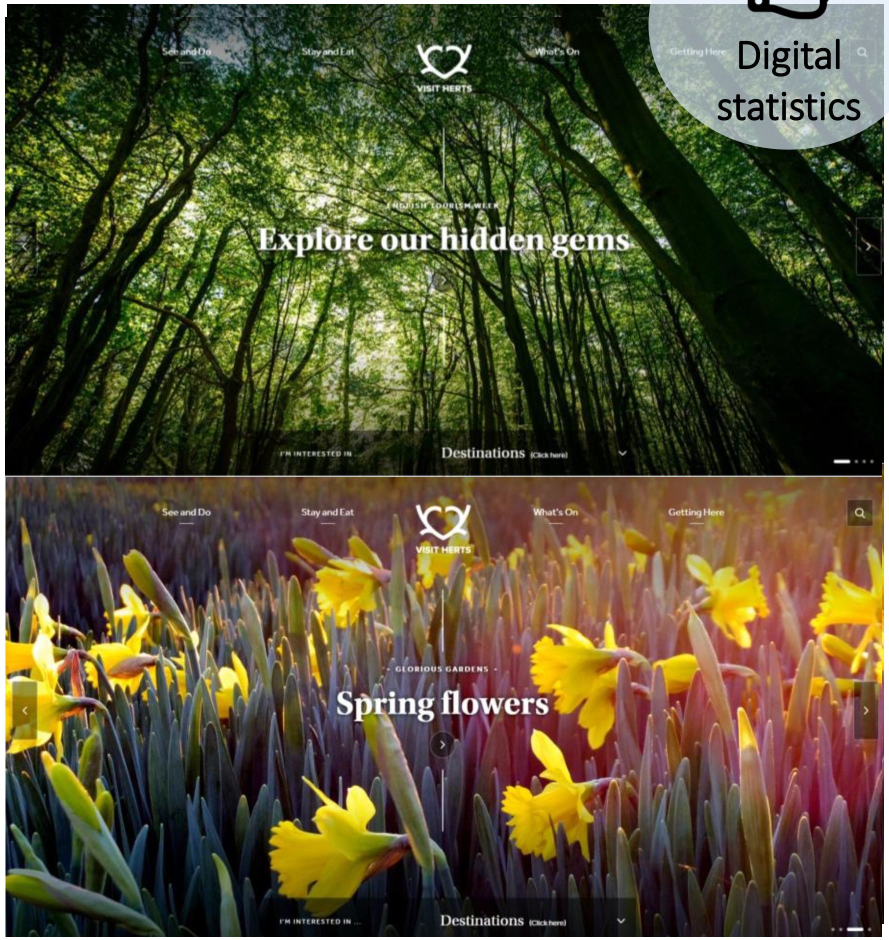
- Serviced accommodation providers saw a slight decrease of **-0.3%** in room occupancy compared to September 2018.

- During September 2019, on average, **89%** of visitors to attractions that completed the Barometer were domestic, **4%** were long haul and **6%** were European. Out of all the overseas visitors, **44%** of attractions reported guests from 'other' countries as being their most prevalent overseas market, which included counties such as, Australia, Canada and Denmark.

Visit Herts Team Update: Digital statistics

September 2019

Digital statistics



Website

13,567 sessions ↑ +25.1%

29,773 pages views

1:48 minutes average dwell time

Social Media

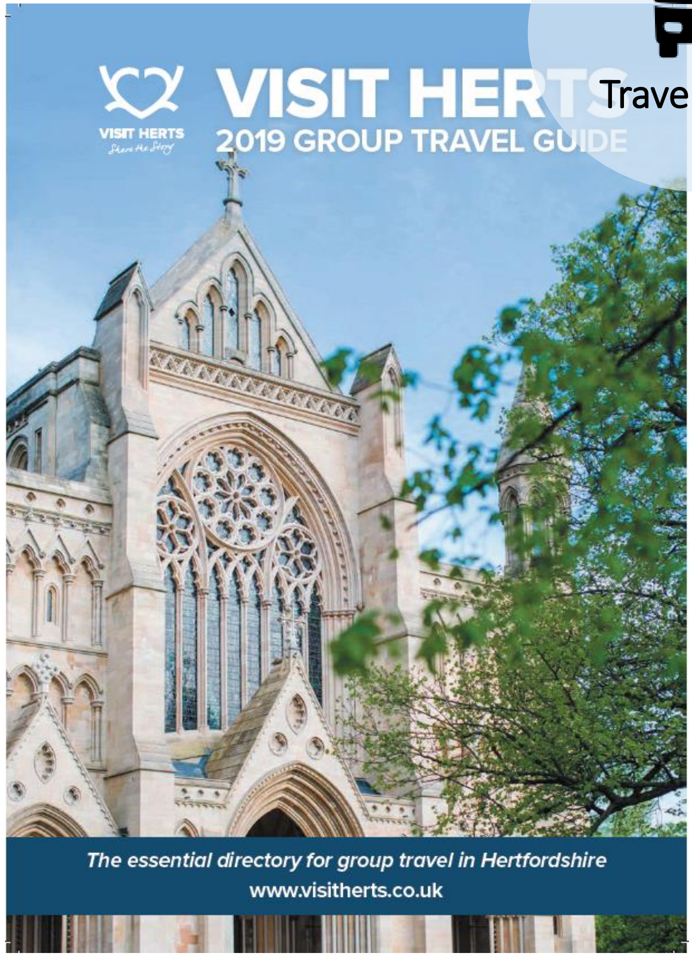
Twitter: 2,391 followers

Facebook: 1,628 followers

Instagram: 2,932 followers

Visit Herts Team Update: Travel Trade

Travel Trade



September 2019: Travel Trade

- September was a busy month for the travel trade team. The team worked closely with Garden Tours, a well-known, popular Dutch group operator to welcome over 15 Dutch group organisers to visit and experience many of the fantastic gardens and food and drink experiences in Hertfordshire.

- This included The Barn at Serge Hill, St Pauls Walden Bury, Ye Olde Fighting Cocks, Benington Lordship Gardens and much more. We have now received confirmation that Garden Tours are selling this exact tour for their 2020 brochure.

- The team also attended at UKinbound AGM at Warwick Castle, alongside making final preparations for attendance at VisitBritain's International Exchange (VIBE) and the Group Leisure Show in October.

VISIT HERTS GO TO PLACES

Visitor Attractions

Visitor Attractions: Monthly performance

Visitor numbers September 2018/2019

2018	2019	% change
66,404	72,738	+9.5%

Range of performance September 2018/2019

Attractions up	Attractions down
44%	56%

Performance according to cost September 2018/2019

Charging	Free
+3.6%	+16.7%

Performance according to attraction location September 2018/2019

Urban	Rural
+20.3%	+4.5%

Factors influencing visitor attractions' performance

Positive

Increase in the number of membership visits.

Increased marketing and promotional activity positively impacted on visitor footfall.

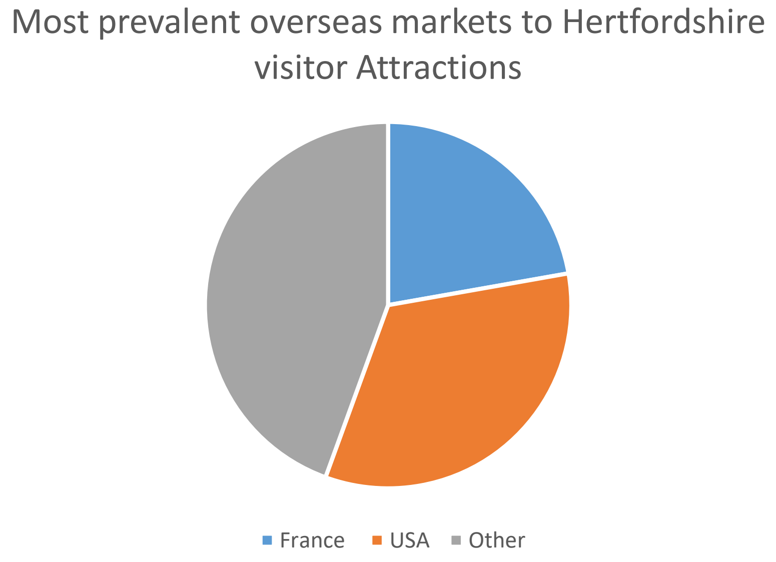
Negative

Particular attractions cited that they had reduced opening times compared to September 2018.

Poor weather experienced towards the end of the month.

Origin of visitors to attractions

- During September 2019, on average, **89%** of visitors to attractions that completed the Barometer were domestic, **4%** were long haul and **6%** were European.
- Out of all the overseas visitors, **44%** of attractions reported guests from 'other' countries as being their most prevalent overseas market, which included counties such as, Australia, Canada and Denmark.



Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in September 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	66,404	72,738	+9.5%	694,291	791,115	+13.9%
October						
November						
December						
September*	66,404	73,855	+11.2%	**694,291**	845,953	+21.8%

**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 September 2019 Hertfordshire accommodation providers experienced an average occupancy of **81.7%.**
- Hertfordshire accommodation providers experienced a slight decrease of **-0.3%** in room occupancy compared to September 2018.
- Revenue per available room saw a decrease of **-2.4%**, with average daily rate also experiencing a decrease of **-2.1%** compared to September 2018.

Year on year room occupancy comparison (%)

Hertfordshire	September 2018	September 2019	September 18/19
Occupancy	81.9%	81.7%	-0.3%

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%	81.7%	-	-	-

74 Hotels

8,297 Rooms

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

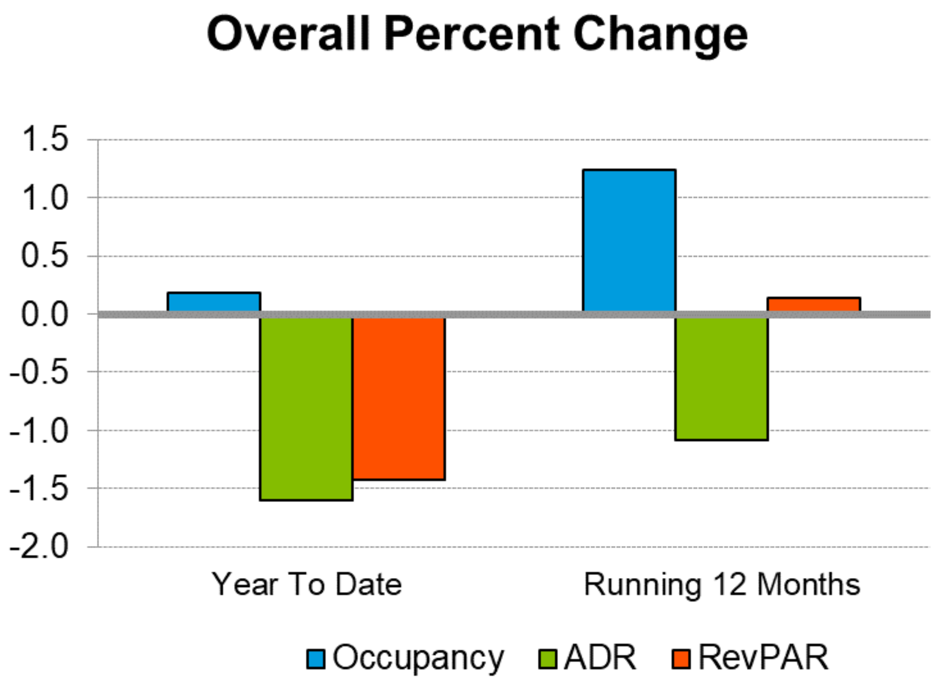
Serviced Accommodation

Year on year ADR comparison (%)

Hertfordshire	September 2018	September 2019	September 18/19
ADR	£72.39	£70.87	-2.1%

Year on year RevPAR comparison (%)

Hertfordshire	September 2018	September 2019	September 18/19
RevPAR	£59.30	£57.90	-2.4%



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	September 2018	September 2019	September 18/19
Supply	307,980	312,300	+1.4%

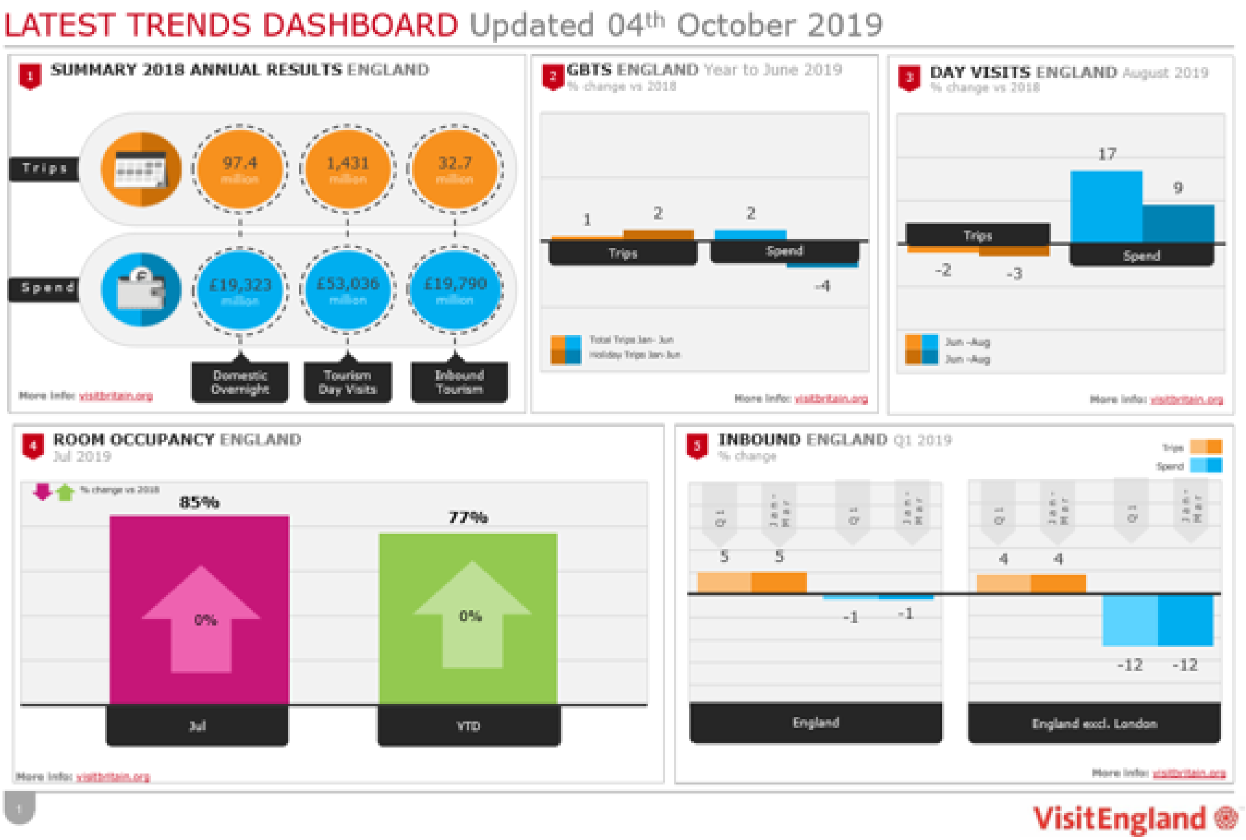
Year on year average demand comparison (%)

Hertfordshire	September 2018	September 2019	September 18/19
Demand	252,295	255,139	+1.1%


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

Other News

Inbound consumer sentiment research

VisitBritain have recently published a report looking at inbound consumer sentiment, focusing on assessing the following areas conducted between August 2016 to September 2019.

1. What are perceptions of Britain's welcome?
2. What are perceptions of Britain's value for money and have these changed?
3. What is the effect on propensity to visit Britain?

The research captured 500 international travellers per market, defined as those who have taken a holiday abroad in the last three years. It should also be noted that at the time of fieldwork and writing of this report the UK was scheduled to leave the EU on 31 October 2019, but the detailed terms of the departure were subject to ongoing negotiations.

Key findings:

- The balance of likelihood to visit has declined since the first August 2016 and also in the September 2019 wave. However, most respondents continue to state their likelihood to visit Britain has not been affected by the EU referendum decision. Britain's reputation overall is below its level in 2016 and has declined in March 2019 but remained overall stable in September 2019. The proportion of those with a more negative view is, however, now the largest group in the Spanish, German and Swedish markets.
- Interest in visiting Britain fell slightly again in September 2019 compared to March 2019 and is significantly lower than in 2016, having shown a trend of decline over time. 45% of European respondents are concerned about the uncertainty around travel arrangements, although only 9% are very concerned and 46% are not concerned. Concern, however, increased significantly in spring 2019 from the previous wave ahead of the initial exit deadline and increased in Europe again in the latest wave.
- 46% agree that the fall in the value of the pound makes it more likely for them to personally visit compared to 56% in August 2016 making it less of a compelling reason to visit. However, most respondents continue to see Britain as a destination which is welcoming and as open minded and tolerant, although there was a slight decline in September 2019 at the overall level.
- After previous declines following a number of terrorist attacks in 2017, perceptions of Britain being a safe and secure destination have almost fully recovered on the overall level.
- Perceptions vary greatly by market. Those from US and China generally show the most positive attitudes. In European markets the picture is less clear-cut, but in general attitudes tend to be more upbeat among Italians and the French. In the latest wave we have seen a softening of results in many metrics among Germans. We had seen declines in many metrics in spring 2019 in the US market; in September 2019, some ground has been regained in many of these areas but there is still room to catch up with the positive sentiment we had seen prior to 2019.

To view the full report click here

National picture

GB Day Visits Survey September 2019

Summary of Results

- The volume of day visits in Great Britain in the three months to September 2019 increased to 468 million, a rise of +2% when compared with the same period last year
- The value of those visits however increased by +8% during the same period to £19.3 billion
- Year to date at the GB level, volume decreased by -3% to 1.3 billion but the value of visits increased by +3% to £49.2 billion when compared to the same period in 2018
- Looking at England, volume increased by +1% to 388 million visits in the three months to September, while value increased by +6% to £16.1 billion compared to the same period in 2018
- Year to date the volume of day visits in England decreased by -2% to £1.1 billion when compared to 2018. Value however increased by +4% to £41.4 billion compared to the same period
- 3+ hour day visits in Great Britain for the three months to September 2019 remained unchanged at 751 million compared to the same period in 2018
- The value of these visits increased however by +7% to £26.9 billion compared to the same period in 2018
- Year to date, volume is down by -3% to 2.1 billion 3+ hour visits but value increased by +4% to £70.8 billion compared to 2018
- In England, volume declined by -1% to 619 million in the three months to September 2019. However, the value of these visits increased by +6%, to £22.6 billion
- Year to date the volume of 3+ hour day visits in England decreased relative to the same period in 2018 by -3% to 1.7 billion while the value increased by +4% to £59.2 billion

To view the full report click here

Other News

VisitEngland: England Occupancy survey August 2019

Summary of Results

- Room occupancy remained level in August at 82%, bedspace occupancy also remained level compared to July 2018 at 63%. In July 2019, there was an increase of +2.3% in room supply and an increase of +1.9% 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 +2% in August compared to the previous year at £79.13. Seaside room occupancy increased by +1% to 89% and bedspace occupancy increased by +1% to 75%.
- Room occupancy across all other destination types remained level compared to the same period 2018. Room occupancy remained level for city/large town accommodation at 82%, while bedspace occupancy increased +1% to 62%. Countryside and small-town destination accommodations both remained at 79% room occupancy. Countryside Bedspace room occupancy increased +1% to 59%, whilst small town bedspace occupancy remained level at 61%.
- Looking at occupancy by establishment size, establishments with 1-25 rooms saw the greatest increase in room occupancy, up +2% at 81%, while bedspace increased +2% to 64%. Room occupancy for establishments sizes with 26-50 rooms & 51-100 rooms both remained level compared to the same period 2018 at 82%, bedspace occupancy increased +1% in 26-50 size rooms to 63%, bedside occupancy in 51-100 sized rooms increased by +1% to 64%.
- Establishments with over 101+ rooms saw a -1% decline in room occupancy to 82%, bedspace occupancy remained level at 62%. Looking at room occupancy by region, the greatest increase was seen in Yorkshire and Humberside, up 2% to 81%, while also increasing +2% in bed space occupancy to 61%.
- The North East increased +1% to 78%, also increasing +1% in bedspace occupancy to 62%. Room occupancy remained level across the South West at 87%, Greater London at 87% and the West Midland at 76%. Bedspace occupancy increased 1% in the Southwest to 65%, remained level across Greater London at 67% and the West Midland at 54%. Room Occupancy declined across all other regions compared to the same period 2018 between -1% to -3%.

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-

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, September 2019. Thank you.

VISIT HERTS

Share the Story

VISIT HERTS GO TO PLACES