



# VISIT HERTS BUSINESS BAROMETER

## October 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 October 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

<a href="#">Key findings</a>	4
<a href="#">Visit Herts team update</a>	5
<a href="#">Visitor Attractions: monthly performance</a>	7
<a href="#">Serviced Accommodation: monthly performance</a>	11
<a href="#">Other news: national picture</a>	15
<a href="#">Glossary</a>	19



Hertfordshire's visitor economy performance

## Visit Herts Business Barometer

October 2019

In October 2019, tourism businesses saw...

### Visitor Attraction footfall



October 2018-2019

**+55%**



### Serviced Accommodation

October 2018-2019

-1.7%

Occupancy



-4.9%

REVPAR



-3.2%

ADR



- In October 2019, Hertfordshire attractions experienced an increase of **+55%** in visitor footfall, compared to October 2018. Factors cited to have positively impacted performance included an increase in events hosted and popular Halloween activity compared to October 2018.
- Serviced accommodation providers saw a slight decrease of **-1.7%** in room occupancy compared to October 2018.
- During October 2019, on average, **90%** of visitors to attractions that completed the Barometer were domestic, **4%** were long haul and **6%** were European. Out of all the overseas visitors, **37.5%** of attractions reported guests from France as being their most prevalent overseas market.



# Visit Herts Team Update: Digital statistics

October 2019

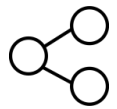


Website

16,821 website sessions  -21% vs. October 2018

35,585 pages views

01:58 minutes average dwell time



Social Media



2,408 followers



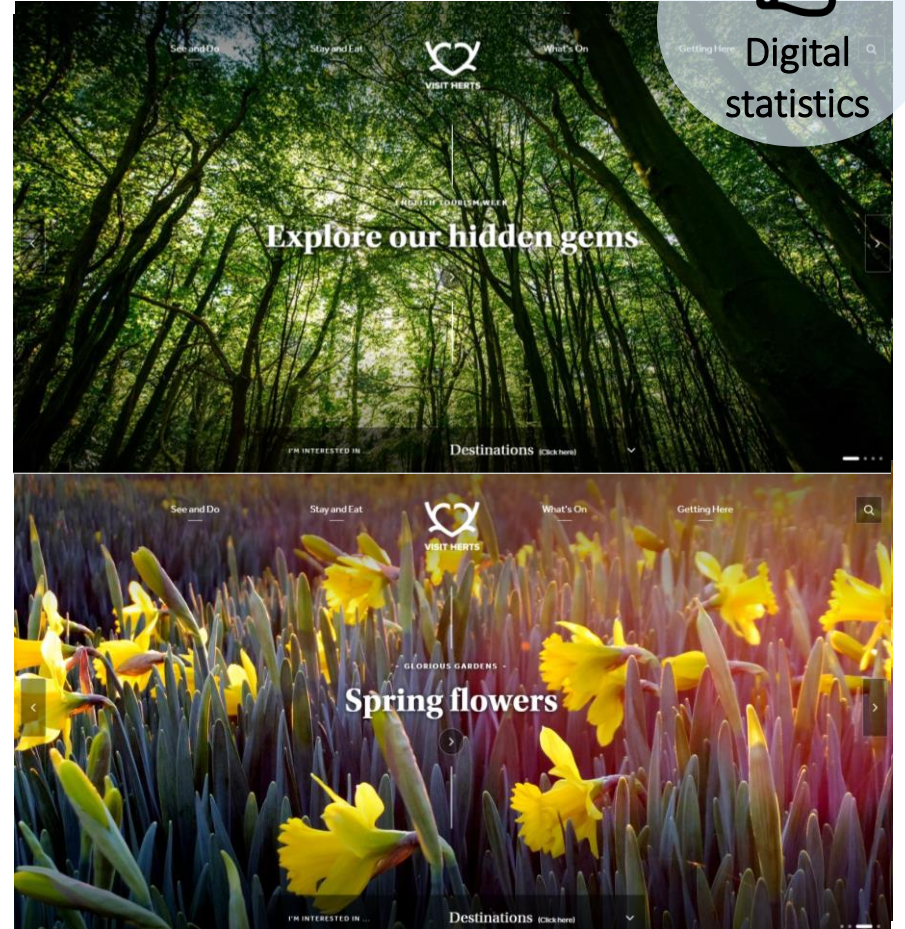
1,639 followers



2,111 followers



Digital statistics



VISIT HERTS



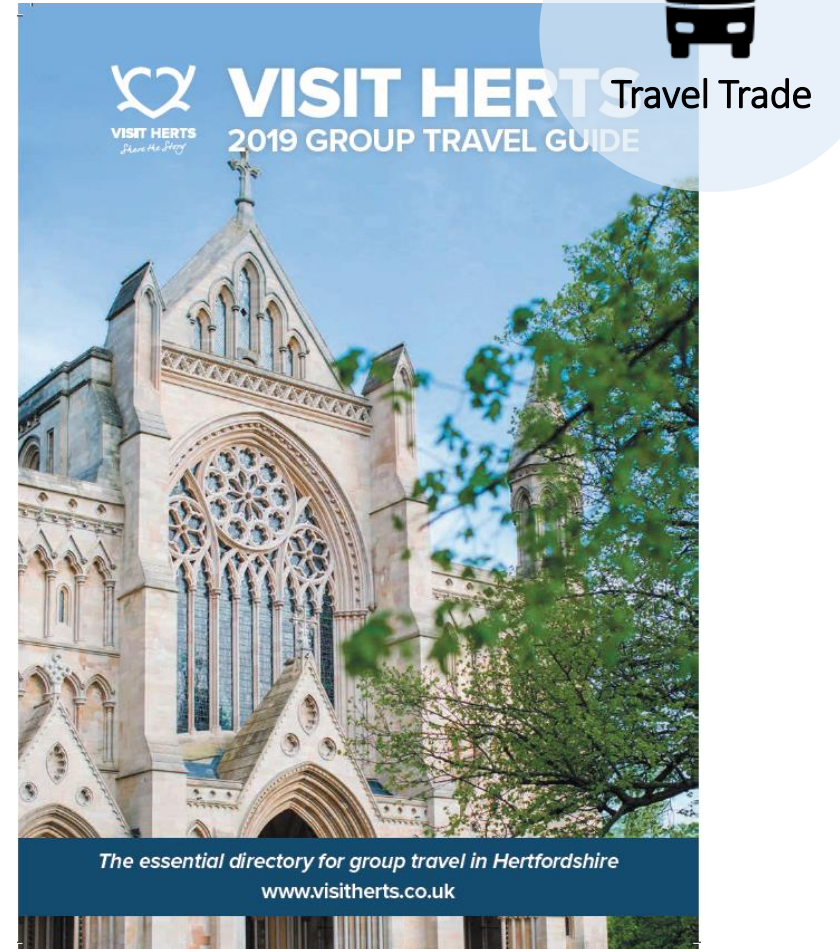
GO TO PLACES



## Visit Herts Team Update: Travel Trade

October 2019: Travel Trade

- This month, our Travel Trade and PR managers attended VisitBritain's International Exchange event (VIBE) where they met with VisitBritain's international representatives from each market. It was a great opportunity to find out how each inbound market was performing and what types of travel experiences they were looking for when they travel to the UK. The team were also joined by our partners Knebworth House, Frogmore Paper Mill and the Mercure Noke Hotel in St Albans at the Group Leisure show.
- The show was well attended and the Visit Herts stand was busy throughout the day with group travel organisers enquiries.
- This month also saw a dedicated workshop for Herts businesses on Taking England to the World, VisitEngland's new training program to support international tourism business into the area.



# Visitor Attractions





# Visitor Attractions: Monthly performance

## Visitor numbers October 2018/2019

2018	2019	% change
65,887	102,113	+55.0%

## Range of performance October 2018/2019

Attractions up	Attractions down
85%	15%

## Performance according to cost October 2018/2019

Charging	Free
+83.7%	+26.6%

## Performance according to attraction location October 2018/2019

Urban 	Rural 
+23.6%	+78.1%







# Factors influencing visitor attractions' performance

Positive



Additional events hosted compared to October 2018



Popular Halloween activity

Negative



Particular attractions cited that they had reduced opening times



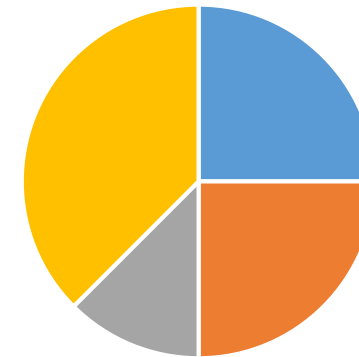
Poor weather experienced



## Origin of visitors to attractions

- During October 2019, on average, **90%** of visitors to attractions that completed the Barometer were domestic, **4%** were long haul and **6%** were European.
- Out of all the overseas visitors, **37.5%** of attractions reported guests from France as being their most prevalent overseas market.

Most prevalent overseas visitors to Hertfordshire visitor attractions



■ Other ■ USA ■ Netherlands ■ France

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



VISIT HERTS



GO TO PLACES



## 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	65,887	102,113	+55.0%	760,178	893,228	+17.5%
November						
December						
October*	65,887	102,113	+55.0%	760,178	893,228	+17.5%

\*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



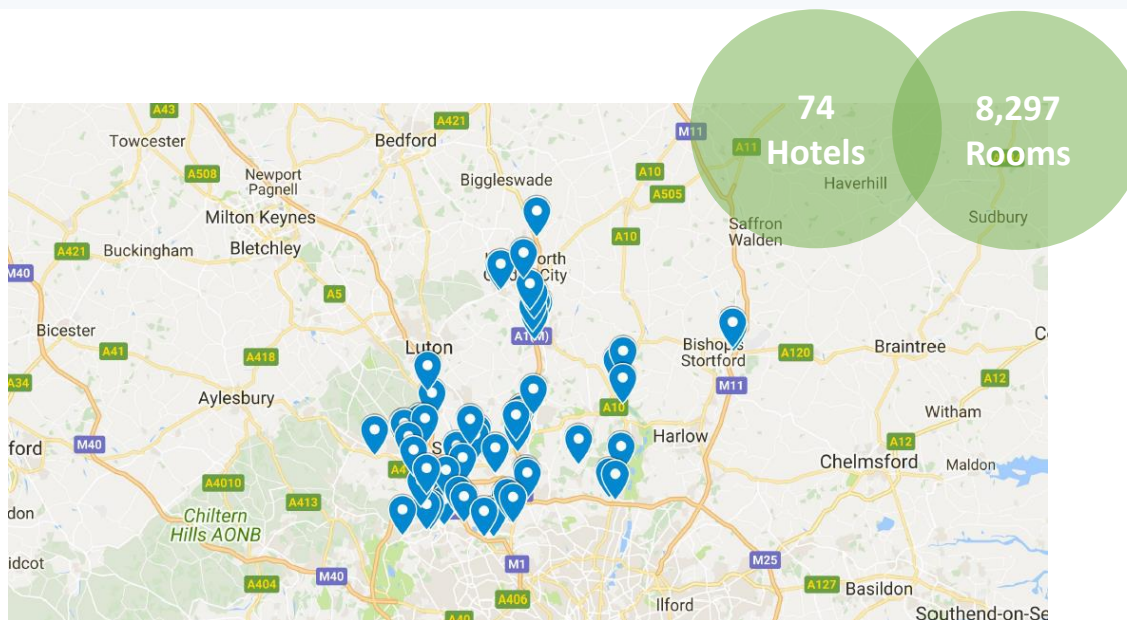
- According to figures from STR Global for **74** larger and chain hotels, in October 2019 Hertfordshire accommodation providers experienced an average occupancy of **80.1%**.
- Hertfordshire accommodation providers experienced a slight decrease of **-1.7%** in room occupancy compared to October 2018.
- Revenue per available room saw a decrease of **-4.9%**, with average daily rate also experiencing a decrease of **-3.2%** compared to October 2018.

## Year on year room occupancy comparison (%)

Hertfordshire	October 2018	October 2019	October 18/19
Occupancy	81.6%	80.1%	-1.7%

## 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%	80.1%	-	-



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



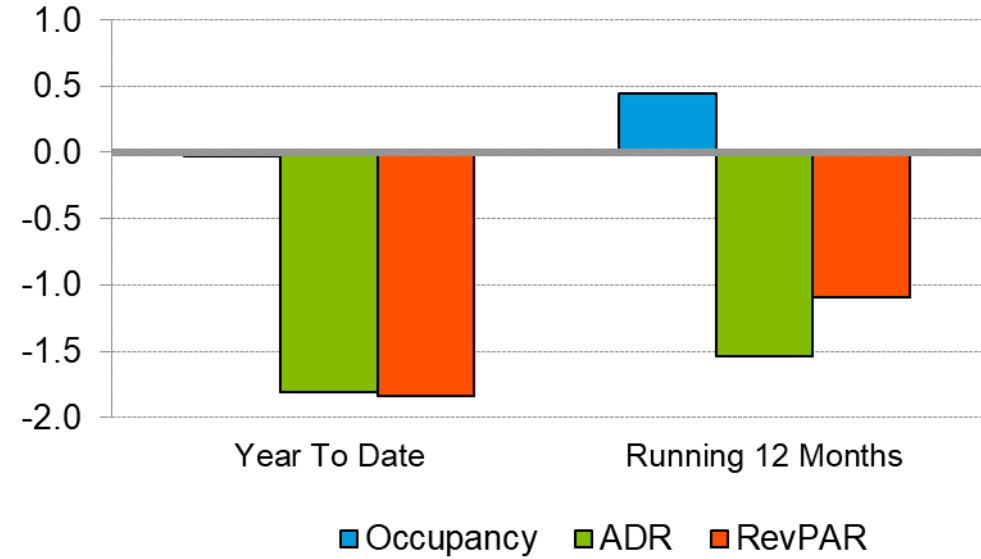
## Year on year ADR comparison (%)

Hertfordshire	October 2018	October 2019	October 18/19
ADR	£71.45	£69.13	-3.2%

## Year on year RevPAR comparison (%)

Hertfordshire	October 2018	October 2019	October 18/19
RevPAR	£58.27	£55.40	-4.9%

## 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	October 2018	October 2019	October 18/19
Supply	317,998	322,555	+1.4%

## Year on year average demand comparison (%)

Hertfordshire	October 2018	October 2019	October 18/19
Demand	259,345	258,489	-0.3%



Image credit: Champneys



VISIT HERTS



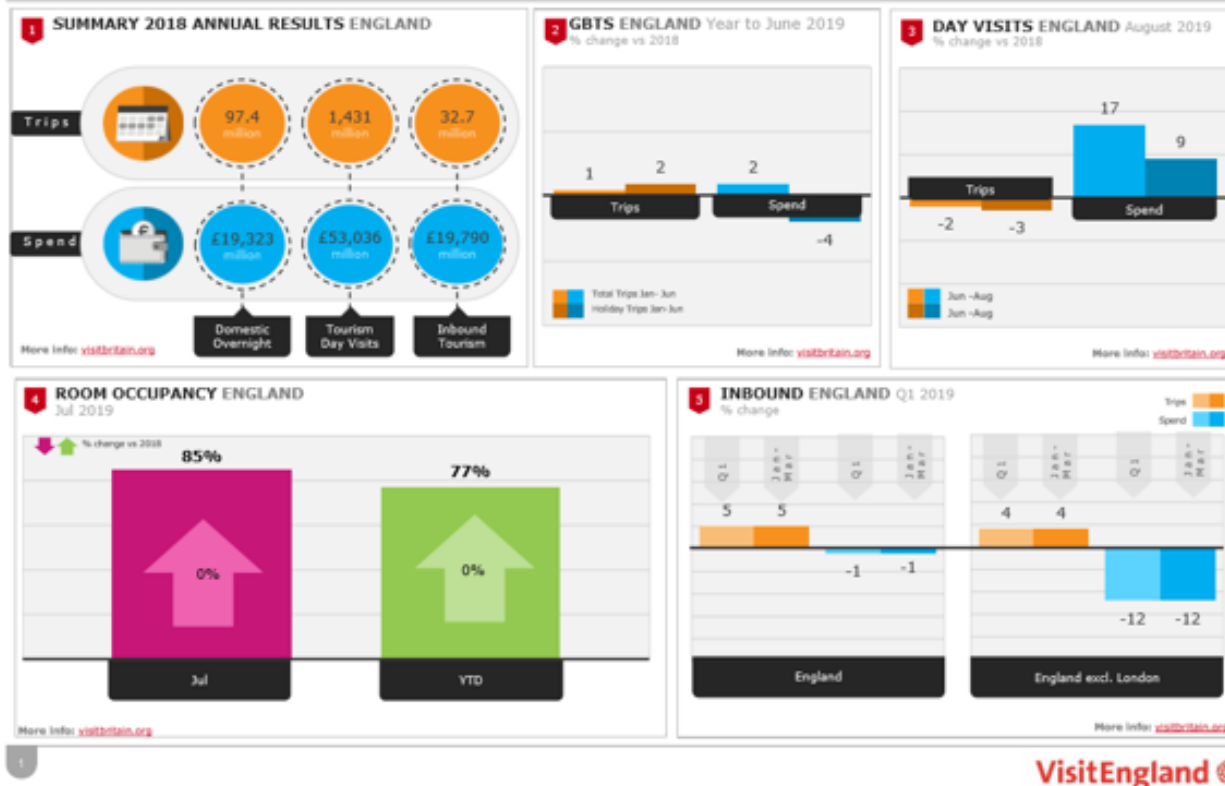
GO TO PLACES

# Other News: National results





## LATEST TRENDS DASHBOARD Updated 04<sup>th</sup> 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 October 2019

### Summary of Results

- The volume of day visits in Great Britain in the three months to October 2019 decreased by -3% when compared with the same period last year, to 434.6 million.
- The value of those visits also decreased by -4% to £17.8 billion.
- At the year-to-date level for Great Britain, volume decreased by -3% to 1.4 billion day visits. However, the value of these visits increased by +2% to £53.8 billion.
- For England, volume decreased by -4% to 361 million visits in the three months prior to October 2019, while value decreased by -3% to £15.1 billion compared to the same period in 2018.
- Year-to-date day visits in England decreased by -3% to 1.2 billion. However, the value of these visits, increased by +3% to £45.4 billion.
- In the three months to October 2019, 3+hour day visits in Great Britain decreased by -1% compared to the same period in 2018, to 715.8 million visits.
- The value of these visits also decreased by -1% to £25.3 billion.
- In terms of year-to-date for Great Britain, volume is down by -3% to 2.3 billion while value for these visits is up by +3% at £77.5 billion.
- For England, volume also declined by -1% to 591.1 million in the three months to October 2019, while value increased by +1% to £21.4 billion.
- Year-to-date day visits in England also decreased by -3% to £1.9 billion. The value of these visits was however up +3% to £65 billion.

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



VisitEngland®



VISIT HERTS



GO TO PLACES



### VisitEngland Occupancy Survey: September 2019 results

#### Summary of Results

- Room occupancy remained level in September at 83%, bedspace occupancy declined -1% compared to September 2018 at 57%. In July 2019, there was an increase of +2.2% in room supply and an increase of +1.8% 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 +3% in September compared to the previous year at £87.02. Looking at destination type, Seaside room occupancy increased by +2% to 85% and bedspace occupancy increased by +1% to 61% in September 2019.
- Countryside establishments saw an increase of +2% in room occupancy and remained level in bedspace occupancy at 52%. Room occupancy remained level for small town establishments at 81%, bedspace occupancy also remained level at 57%. City/large town establishments saw a decline in roomspace occupancy of -1% to 84%, while bedspace occupancy saw a decline of -1%.
- Looking at occupancy by establishment size, establishments with 1-25 rooms saw the greatest increase in room occupancy, up +3% at 82%, while bedspace increased +1% to 58%. Room occupancy for establishment sizes with 26-50 rooms & 101+ rooms both remained level compared to the same period 2018 at 82% and 84% respectively, Establishments of 26-50 rooms declined -1% in bedspace occupancy to 57%, establishments of 101+ rooms also declined -1% to 57%. Establishment sizes 51-100 rooms saw a decline of -1% in room space occupancy to 82% and declined -1% in bedspace to 59%.
- Looking at room occupancy by region, Yorkshire and Humberside saw an increase of +1% in roomspace occupancy to 82% and remained at level room space occupancy at 57%. Roomspace either remained level or declined across all other regions. Room occupancy remained level through Greater London at 87%, South West of England at 85%, South East of England at 83%, and East of England at 81%. Room space declined by -1% in the North East at 80% and North West England at 81%. Both the East Midland and West Midlands saw declines of -2% to 79% room occupancy.

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





*Share the Story*

### 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](mailto: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, October 2019. Thank you.



VISIT HERTS



GO TO PLACES