



VISIT HERTS BUSINESS BAROMETER

November 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 November 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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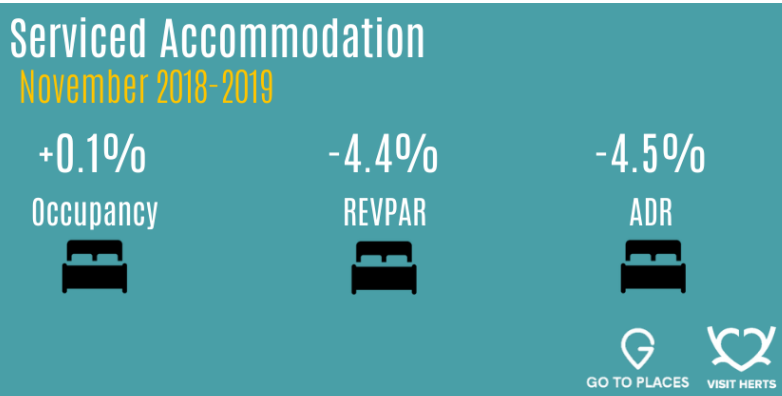
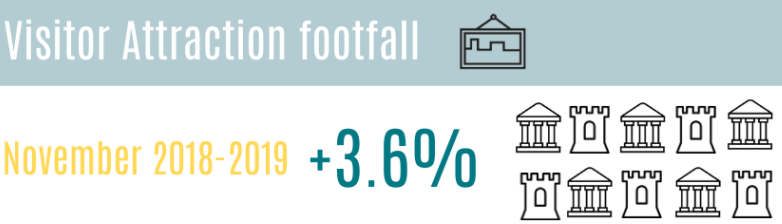
Key Findings

Hertfordshire's visitor economy performance

Visit Herts Business Barometer

In November 2019, tourism businesses saw...

November 2019



- In November 2019, Hertfordshire attractions experienced an increase of **+3.6%** in visitor footfall, compared to November 2018. Factors cited to have positively impacted performance included an increase in events hosted and strong Christmas campaigns and activity.
- The performance of serviced accommodation providers was on par, with a slight increase of **+0.1%** in room occupancy compared to November 2018.
- During November 2019, on average, **94%** of visitors to attractions that completed the Barometer were domestic, **2%** were long haul and **5%** were European. Out of all the overseas visitors, **50%** of attractions reported guests from France as being their most prevalent overseas market.



Visit Herts Team Update: Digital statistics

November 2019

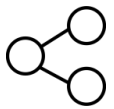


Website

17,186 website sessions

34,210 pages views

01:52 minutes average dwell time



Social Media



2,439 followers



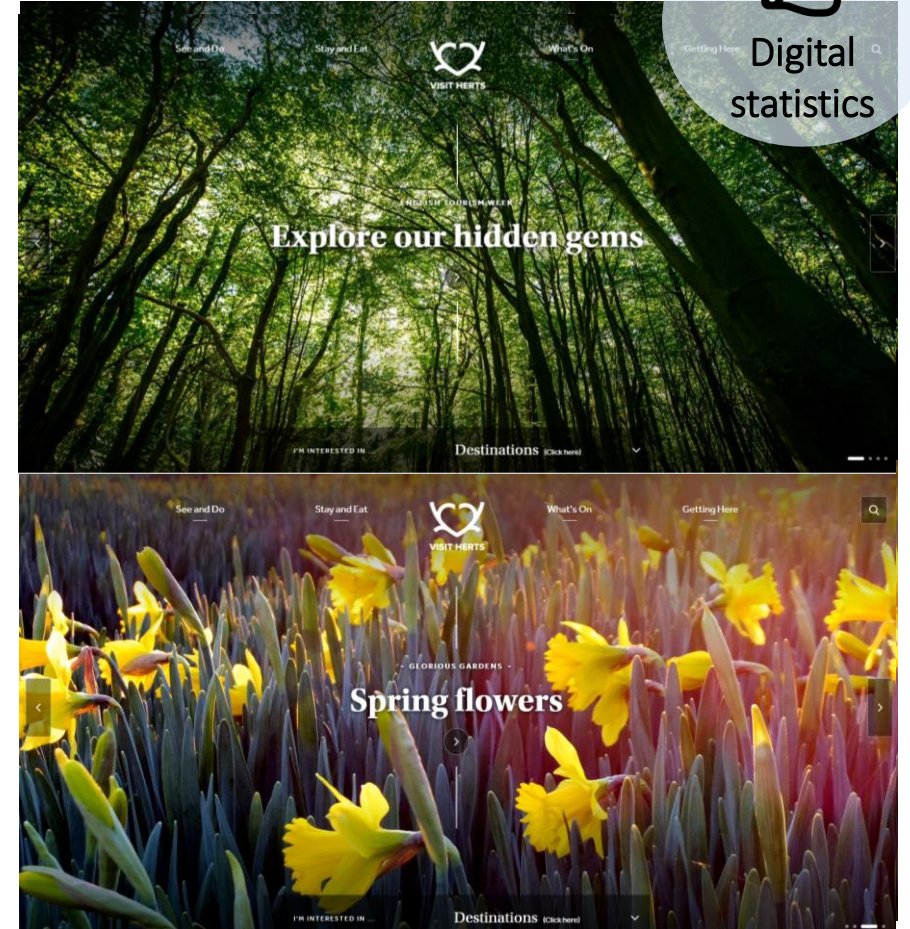
1,641 followers



2,138 followers



Digital
statistics



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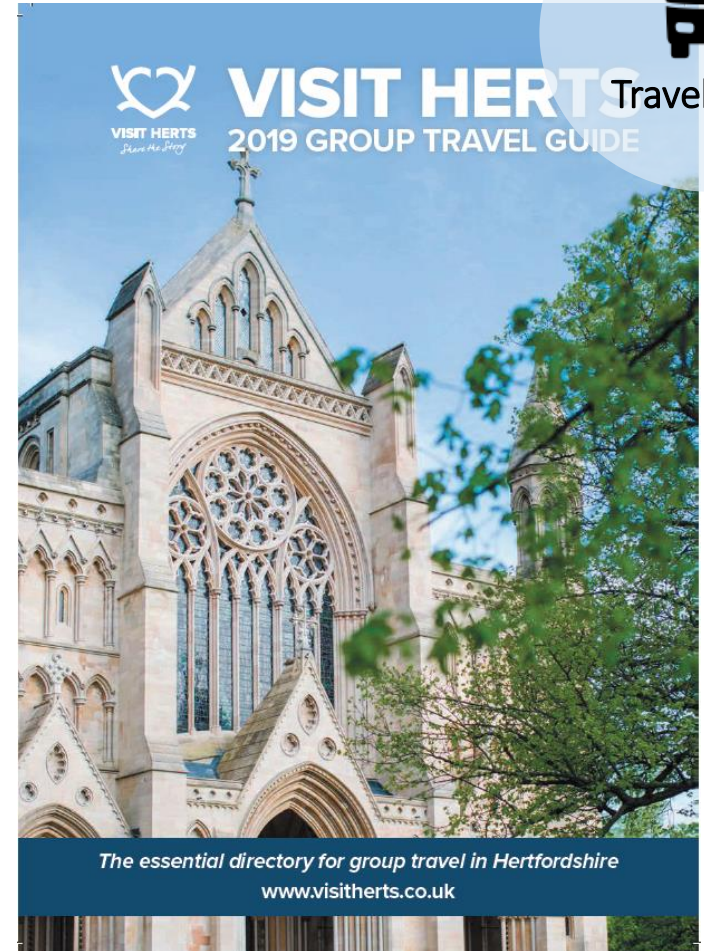
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Visit Herts Team Update: Travel Trade

November 2019: Travel Trade

- During November, our team spent half a day with the team at St Albans Cathedral, looking at their groups and travel trade strategy, with a final travel trade recommendations document shared with the team with some quick wins and further activity to look at in the new year.
- The team also delivered a dedicated travel trade presentation to all district officers about the activity Visit Herts carries out in the travel trade industry and highlighted ways in which they can get their businesses engaged with this.



Travel Trade



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Visitor Attractions





Visitor Attractions: Monthly performance

Visitor numbers November 2018/2019

2018	2019	% change
45,159	46,796	+3.6%

Range of performance November 2018/2019

Attractions down	The same	Attractions up
37.5%	12.5%	50%

Performance according to cost November 2018/2019

Charging	Free
+3.7%	+3.5%

Performance according to attraction location November 2018/2019

Urban	Rural
	
-5.2%	+13%





Factors influencing visitor attractions' performance

Positive



Strong Christmas campaigns and activity



Additional events hosted compared to the previous year

Negative



Popular exhibitions and events in November 2018



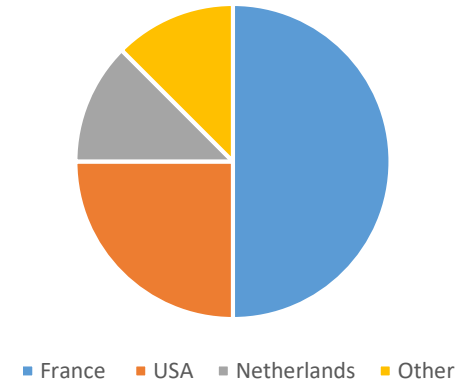
Reduced opening times



Origin of visitors to attractions

- During November 2019, on average, **94%** of visitors to attractions that completed the Barometer were domestic, **2%** were long haul and **5%** were European.
- Out of all the overseas visitors, **50%** of attractions reported guests from France as being their most prevalent overseas market.

Most prevalent overseas visitors to Hertfordshire visitor attractions



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



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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	45,159	46,796	+3.6%	805,337	940,024	+16.7%
December						
November*	45,159	46,796	+3.6%	805,337	940,024	+16.7%

**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.*



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Hertfordshire Accommodation





Serviced Accommodation



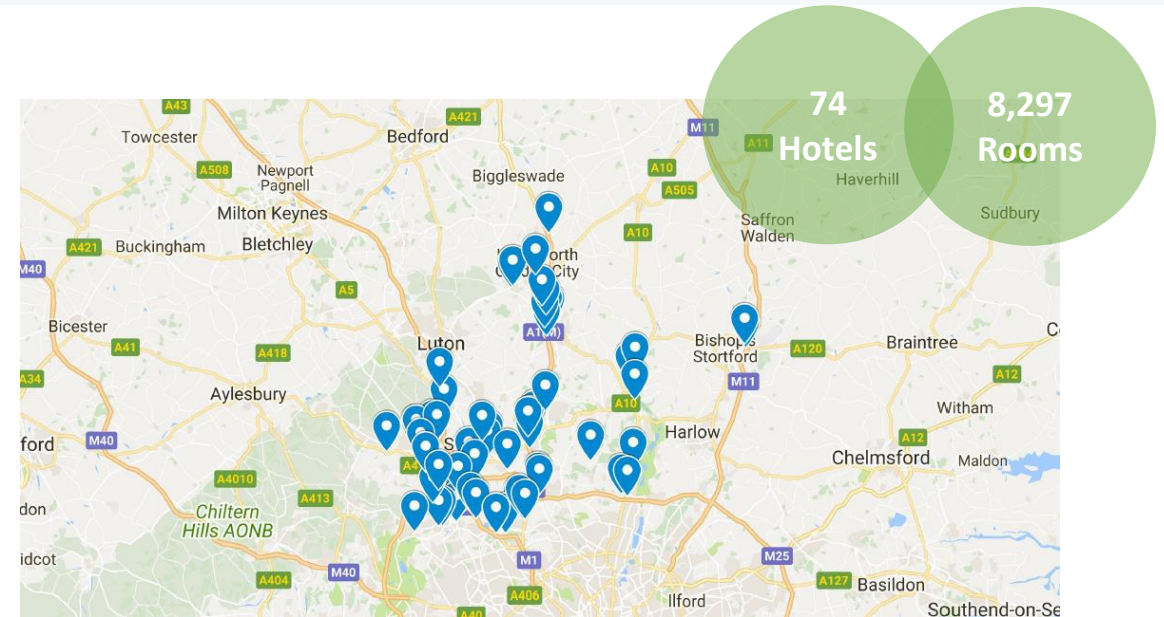
- According to figures from STR Global for **74** larger and chain hotels, in November 2019, Hertfordshire's serviced accommodation providers experienced an average occupancy of **75.5%**, on par with the performance achieved in November 2018 **(+0.1%)**.
- Revenue per available room saw a decrease of **-4.4%**, with average daily rate also experiencing a decrease of **-4.5%** compared to the same month last year.

Year on year room occupancy comparison (%)

Hertfordshire	November 2018	November 2019	November 18/19
Occupancy	75.4%	75.5%	+0.1%

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%	81.7%	80.1%	75.5%	-



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	November 2018	November 2019	November 18/19
ADR	£69.15	£66.04	-4.5%

Year on year RevPAR comparison (%)

Hertfordshire	November 2018	November 2019	November 18/19
RevPAR	£52.14	£49.84	-4.4%

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.



Year on year average supply comparison (%)

Hertfordshire	November 2018	November 2019	November 18/19
Supply	307,770	312,360	+1.5%

Year on year average demand comparison (%)

Hertfordshire	November 2018	November 2019	November 18/19
Demand	232,049	235,715	+1.6%



Image credit: Champneys



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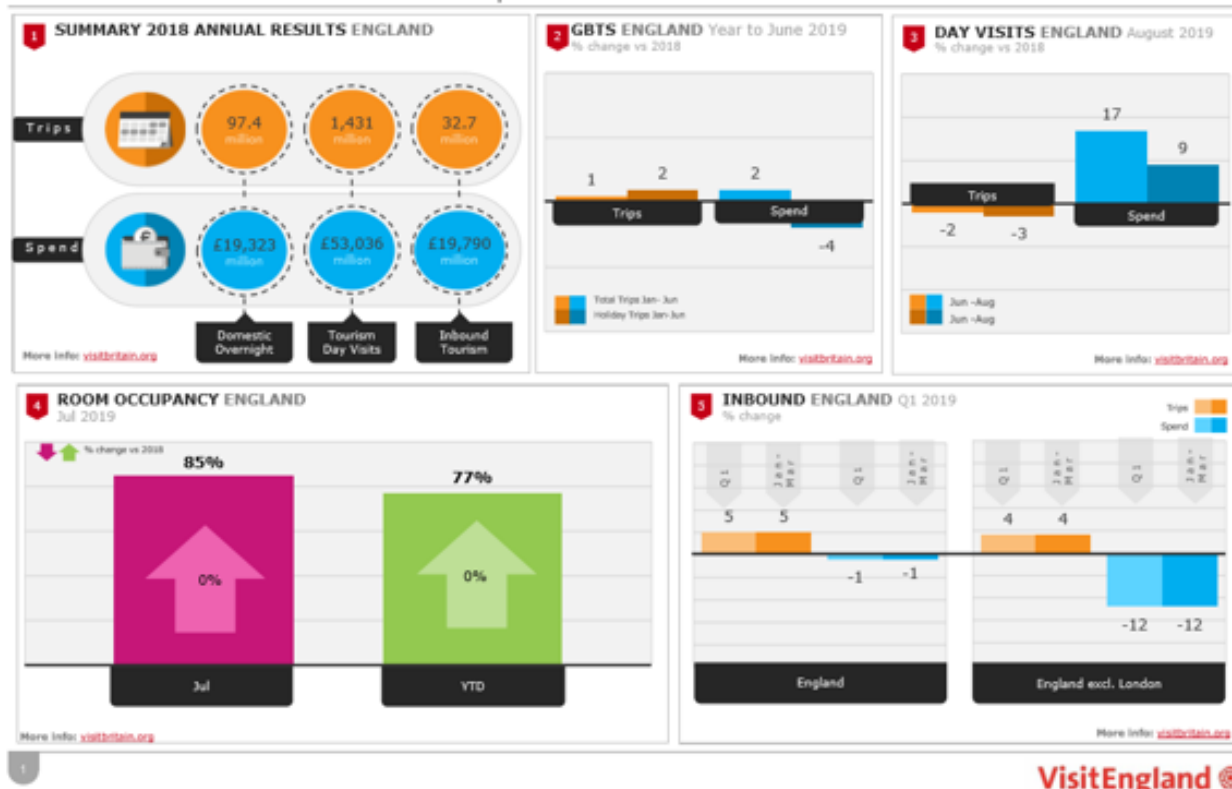
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Other News: National results





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](#)



GB Day Visits Survey November 2019

Summary of Results

- The volume of day visits in Great Britain (GB) in the three months to November 2019 decreased by -2% to 400 million when compared with the same period last year. By contrast, the value of these visits increased by +1% to £17.5 billion
- GB year-to-date volume decreased by -2% to 1.5 billion. However, the value increased by +5% to £61.1 billion
- In the three months to November 2019, the volume of visits in England decreased by -1% to 333 million, the value of these visits also decreased by -1% to £14.4 billion
- Year-to-date volume of visits in England also decreased by -2% to 1.3 billion yet the value of these visits increased by +6% to £51.5 billion compared to the same period in 2018
- 3+ hour day visits in Great Britain for the three months to November 2019 decreased by -1%, compared to the same period in 2018, to 672 million visits
- The value of these visits increased by +2% for the three months prior to the same period last year to £24.7 billion.
- Year-to-date, volume is down by -3% to 2.5 billion visits but value increased by +4% to £87 billion
- In England, volume remained unchanged in the three months prior to November 2019 at 557 million visits. The value of these visits increased, by +3%, to £20.7 billion
- Year-to-date the volume of day visits in England decreased relative to the same period in 2018 by -3% to 2.1 billion. However, the value increased by +5% to £72.9 billion

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





VisitEngland Occupancy Survey: October 2019 results

Summary of Results

- Room occupancy decreased -1% in October at 82%, bedspace occupancy remained level +0% compared to September 2018 at 58%. In October 2019, there was an increase of +2.0% in room supply and an increase of +0.9% 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, decreased by -2% in October compared to the previous year at £81.57. Looking at destination type, Countryside room occupancy increased by +3% to 73% and bedspace occupancy increased by +5% to 53% in October 2019.
- Seaside establishments saw an increase of +1% in room occupancy to 80% and increased +4% in bedspace occupancy at 63%. City/Large town establishments decreased -1% in room occupancy to 83% and remained level at 58% for bed space occupancy. Small town room occupancy decreased -1% to 77%, while bedspace occupancy increased +2% to 58%.
- Looking at occupancy by establishment size, establishments with 1-25 rooms saw the greatest increase in room occupancy, up +3% at 80%, while bedspace increased +3% to 59%. Room occupancy for establishment sizes with 26-50 rooms increased +1% compared to the same period 2018 at 79%, while bedspace increased +2% to 58%.
- Establishments of 51-100 rooms remained level in bed space occupancy at 81%, establishments of 101+ rooms saw a decline in roomspace by -1% to 83%. Looking at room occupancy by region, Yorkshire and Humberside was the only region which increased compared the same month last year, up +2% to 80%, while bedspace occupancy increased +3% to 58%. South West and South East regions remained at level room occupancy at 80% and 79% respectively. East of England, West Midlands and North East regions saw a decline of -1% to 80%, 79% & 76%. Greater London, Northwest England and East Midlands all declined -2% in roomspace occupancy to 88%, 81% & 77% respectively.

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, November 2019. Thank you.



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