



**VISIT HERTS**  
**BUSINESS BAROMETER**

**December 2019**



**GO TO PLACES**



*Credit: Nigel Moore*



# Introduction

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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 December 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 December 2019, tourism businesses saw...

December  
2019

#### Visitor Attraction footfall



December 2018-2019 -1.8%



#### Serviced Accommodation

December 2018-2019

-0.2%

Occupancy



ON PAR

REVPAR



+0.2%

ADR



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- In December 2019, Hertfordshire attractions experienced a decrease of **-1.8%** in visitor footfall, compared to December 2018, with factors cited to have impacted performance included a decrease in events and exhibitions hosted compared to December 2018.
- The performance of serviced accommodation providers saw a slight decrease of **-0.2%**, compared to December 2018. Although, average daily rate saw an increase of **+0.2%** compared to December 2018.
- During December 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, **38%** of attractions reported guests from France as being their most prevalent overseas market, alongside **38%** from 'other' counties, including Poland and Belgium.



## Visit Herts Team Update: Digital statistics

December 2019



Website

29,569 website sessions  +34.2% vs. December 2018

53,602 pages views

01:26 minutes average dwell time



Social Media



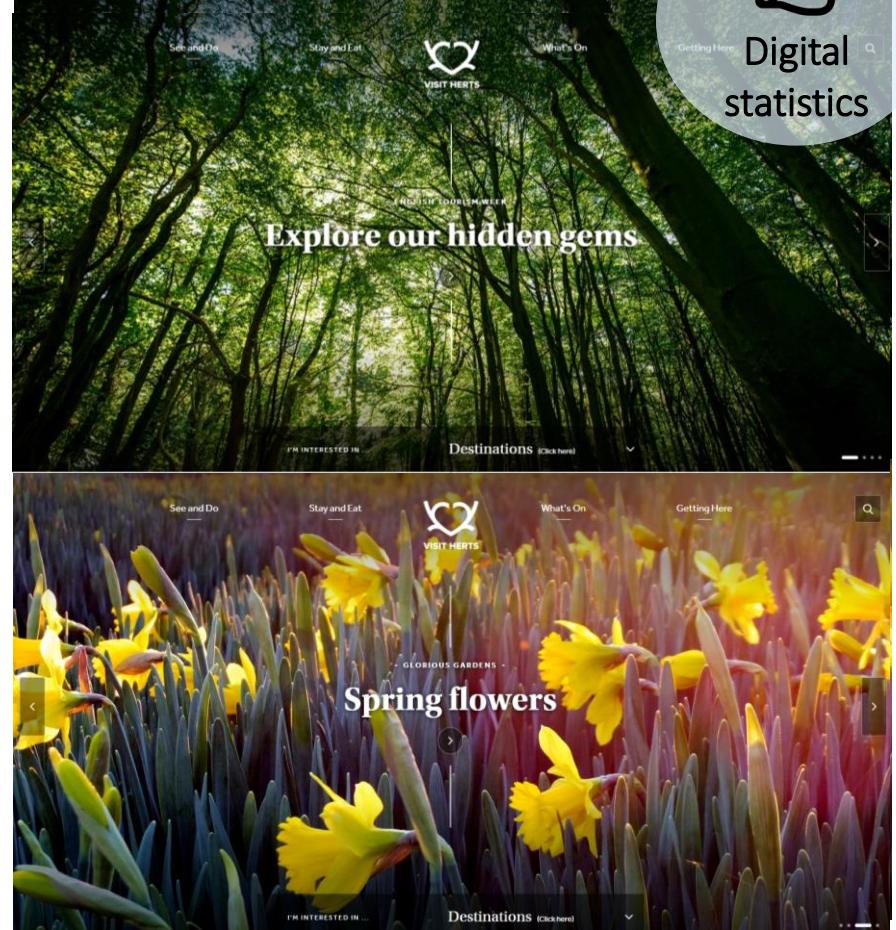
2,578 followers



1,739 followers



2,199 followers

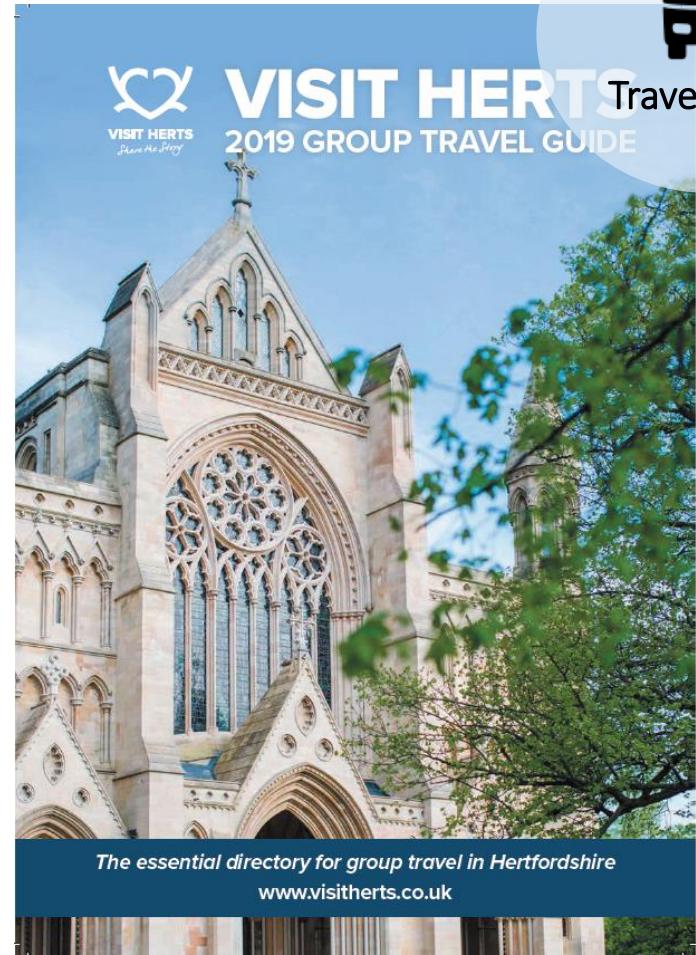




## Visit Herts Team Update: Travel Trade

December 2019

- December was a much quieter month for the travel trade team, with most of the time was spent preparing the Visit Herts stand at Excursions in January, one of the most significant group travel shows in the UK, aimed at domestic group travel organisers and coach operators. The team also spent half the day with partners at Paradise Wildlife Park on their group travel activity.



Travel Trade



# Visitor Attractions





## Visitor Attractions: Monthly performance

Visitor numbers December 2018/2019

2018	2019	% change
68,938	67,677	-1.8%

Range of performance December 2018/2019

Attractions down	The same	Attractions up
44%	11%	44%

Performance according to cost December 2018/2019

Charging	Free
+9%	-9%

Performance according to attraction location December 2018/2019





## Factors influencing visitor attractions' performance

Positive



An increase in events hosted compared to December 2018.



Increase in school group visits compared to December 2018.

Negative



Popular exhibitions and events hosted in December 2018 resulted in a decrease in visitor numbers in December 2019.



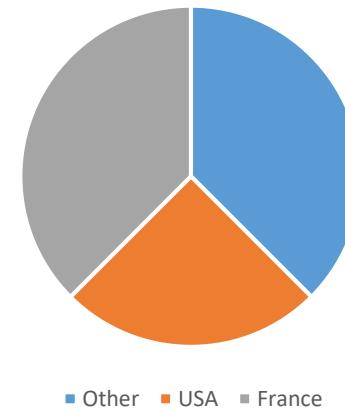
Due to the days Christmas fell upon, certain attractions were closed for longer in December 2019, compared to December 2018.



### Origin of visitors to attractions

- During December 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, **38%** of attractions reported guests from France as being their most prevalent overseas market, alongside **38%** from 'other' counties, including Poland and Belgium.

Most prevalent overseas markets to Hertfordshire Visitor Attractions- December 2019



Graph showing the percentage of the most prevalent overseas markets to Hertfordshire attractions in December 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	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	68,938	67,677	-1.8%	874,275	1,007,701	+15.3%
December*	68,938	67,677	-1.8%	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.

# Hertfordshire Accommodation





## Serviced Accommodation



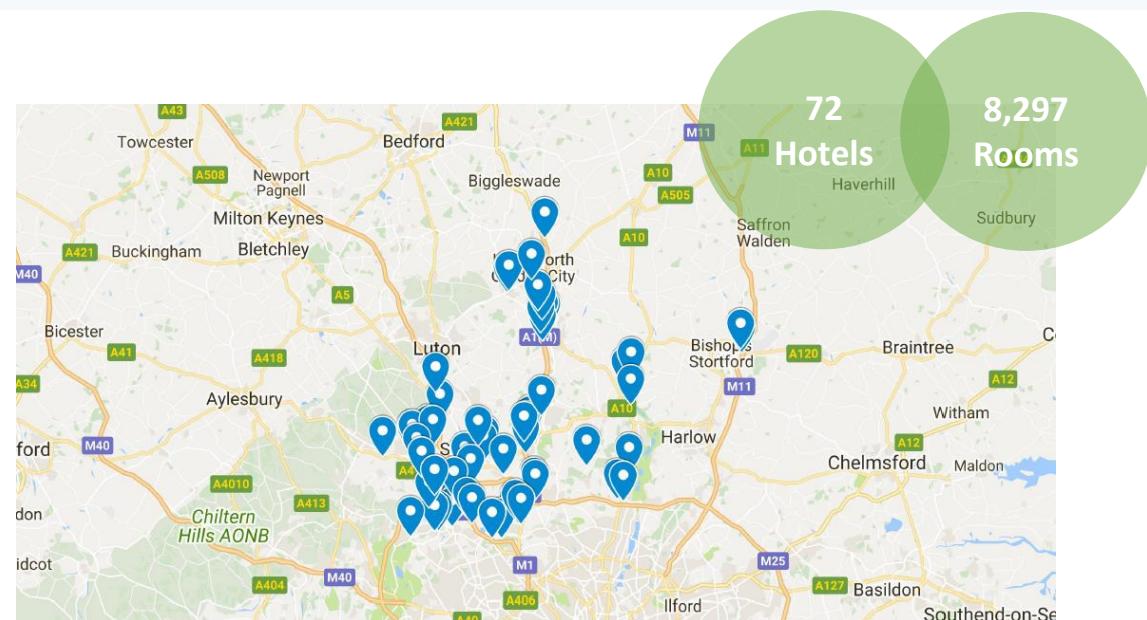
- According to figures from STR Global for **72** larger and chain hotels, in December 2019, Hertfordshire's serviced accommodation providers experienced an average occupancy of **69.1%**, seeing a slight decrease of **-0.2%** compared to December 2018. Revenue per available room was on par with December 2018, while average daily rate saw a slight increase of **+0.2%** compared to the same month last year.

### Year on year room occupancy comparison (%)

Hertfordshire	December 2018	December 2019	December 18/19
Occupancy	69.3%	69.1%	-0.2%

### 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%	69.1%



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



## Serviced Accommodation

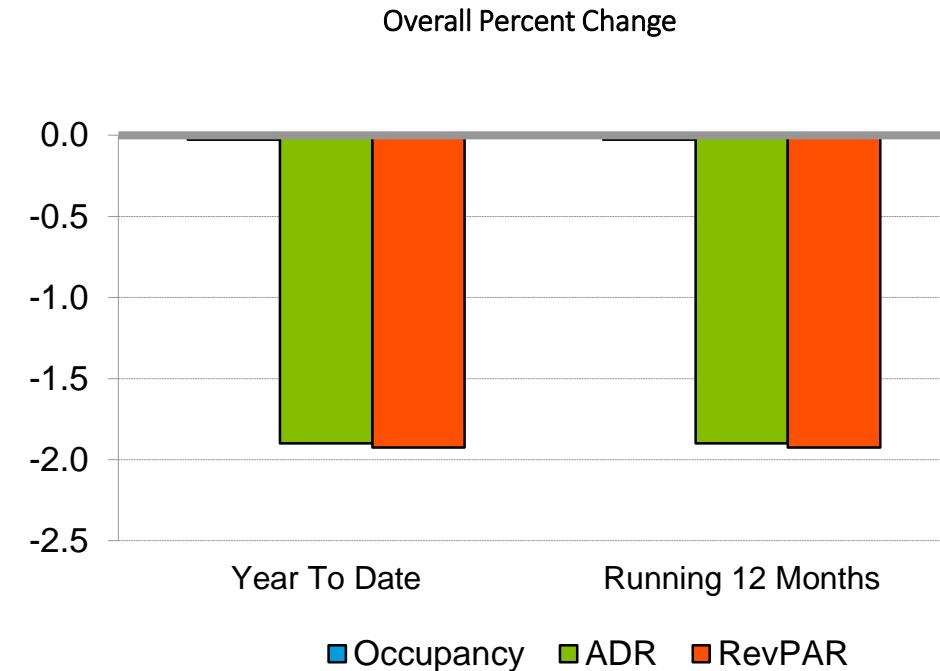


### Year on year ADR comparison (%)

Hertfordshire	December 2018	December 2019	December 18/19
ADR	£64.10	£64.23	+0.2%
Occupancy	84.0%	84.0%	ON PAR

### Year on year RevPAR comparison (%)

Hertfordshire	December 2018	December 2019	December 18/19
RevPAR	£44.39	£44.41	ON PAR
Avg. Occupancy	84.0%	84.0%	ON PAR



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	December 2018	December 2019	December 18/19
Supply	318,029	322,772	+1.5%

### Year on year average demand comparison (%)

Hertfordshire	December 2018	December 2019	December 18/19
Demand	220,249	223,170	+1.3%





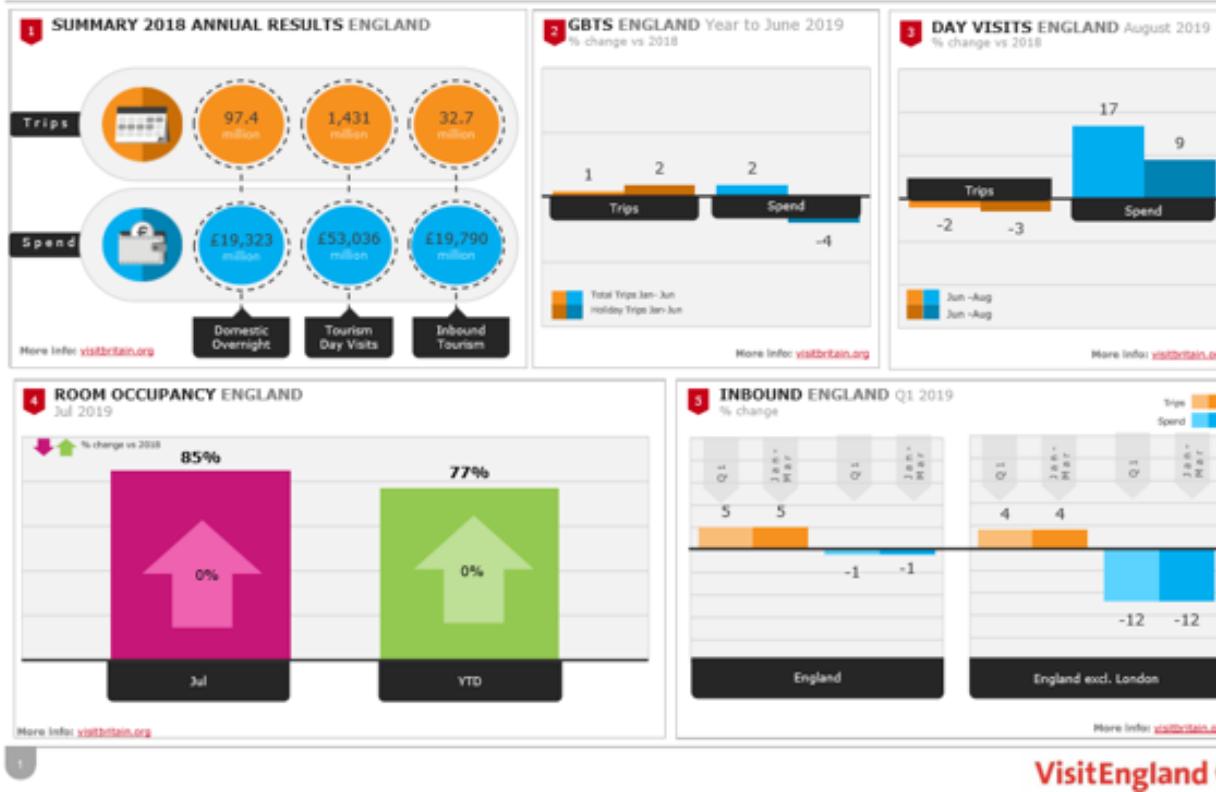
## Other News: National results





## Other News

### 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](#)





## National picture

### GB Day Visits Survey December 2019

#### Summary of Results

- The volume of day visits in Great Britain in the three months to December 2019 decreased by -4% to 400 million when compared with the same period last year.
- The value of those visits increased by +10% to £17.8 billion. For the calendar year, GB level volume decreased by -3% to 1.7 billion in 2019 but the value of visits increased by +5% to £67 billion.
- Looking at England, volume decreased by -5% to 335 million visits in the three months to December 2019, but value increased by +13% to £15.1 billion compared to 2018.
- The calendar year volume of day visits in England decreased by -3% to 1.4 billion in 2019. Value however increased by +7% to £56.5 billion compared to 2018.
- 3+ hour day visits in Great Britain for the three months to December 2019 decreased by -2% to 660 million compared to the same period in 2018. The value of these visits increased by +7% £24.7 billion.
- For the calendar year, volume is down by -3% to 2.7 billion visits but value increased by +5% to £95.6 billion in 2019. In England, volume decreased by -3% to 549 million in the three months to December 2019. The value of these visits increased, by +13%, to £20.9 billion.
- For the calendar year, volume of day visits in England decreased by -3% to 2.3 billion in 2019 but value increased by +6% to £80.1 billion compared to 2018.

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





### VisitEngland Occupancy Survey: November 2019 results

#### Summary of Results

- Room occupancy remained level in November at 79%, bedspace occupancy increased, +1% compared to November 2018 at 55%. In November 2019, there was an increase of +2.0% in room supply and an increase of +2.4% 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 November compared to the previous year at £77.76.
- Looking at destination type, Countryside room occupancy increased by +1% to 65% and bedspace occupancy increased by +1% to 44% in November 2019. All other destination types remained level in room occupancy compared to the same month 2018. City/Large town at 81% room occupancy, increased +1% in bedspace to 56%. Seaside locations at 71% room occupancy increased +1% in bedspace to 52% and Small towns at 71% room occupancy remained level in bedspace at 51%.
- Looking at occupancy by establishment size, establishments with 12-25 rooms saw the greatest increase in room occupancy, up +4% to 74% while bedspace increased +3% to 53%. Establishments with 26-50 rooms and 51-100 rooms both increased +1% in roomspace occupancy. Establishment with 26-50 rooms at 75% room occupancy increased +2% in bedspace to 54%, Establishments with 51-100 rooms at 77% room occupancy increased +1% in bedspace. Establishment with 101+ rooms remained level in roomspace occupancy and increased +1% in bedspace.
- Yorkshire and Humberside and Northeast England both increased by +3% to 80% and 76% respectively, both regions also increased +3% in bedspace occupancy to 57% and 54%. West Midland increased +1% to 79% in room occupancy and +1% in bed pace occupancy, East Midland increased +1% to 75% in roomspace and +1% in bedspace occupancy to 52%. Southwest region increased +1% in roomspace to 74% and +1% in bedspace. Regions East of England, Northwest England and Greater London all remained level in roomspace occupancy. Southwest England was the only region to decline in room occupancy in November 2019.

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



# Glossary

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**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, December 2019. Thank you.



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