

Hertfordshire Consumer Product Testing Survey – Herts, Camera, Action

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University of Hertfordshire **UH**



HM Government



Hertfordshire
Local Enterprise
Partnership



HERTFORDSHIRE
GROWTH HUB

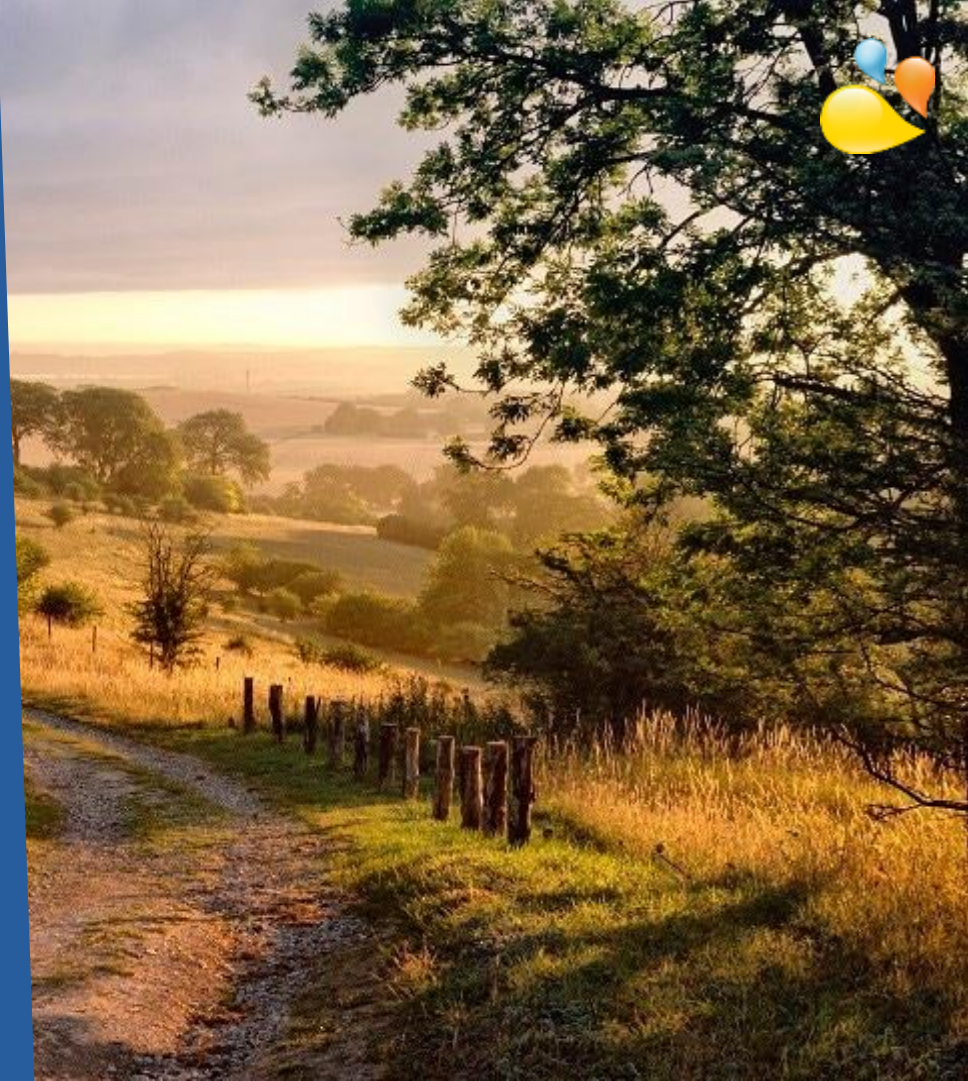


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Introduction





Background and Objectives

The Covid-19 pandemic was an existential threat to the UK visitor economy. Local businesses and destinations in Hertfordshire were no less impacted by the crisis, with visitor footfall being down compared to pre-pandemic levels and are yet still to fully recover.

The Visit Herts' 3 year strategy focuses on supporting the sector to rebuild, capitalise on growth opportunities and deliver sustainable destination management to recover the sector value and jobs to pre-pandemic levels. **The Herts, Camera Action project is a key element to this recovery.**

Ten successful businesses have been selected as part of the project and a bespoke piece of marketing insight research was required to test the potential appeal and likely commercial success of each, as well as the awareness and perceptions of Hertfordshire as a tourist destination.

The research had two primary objectives:

- Provide an **overview of recent visitor insights**, as well as delving into **how Hertfordshire is perceived** and gauging **awareness, consideration and familiarity** as a visitor destination
- **Appraise, test and evaluate** the ten selected **screen tourism experience concepts** to understand **appeal, likelihood to visit and potential key audiences** for each



Methodology – What we did

What? An online panel survey comprising of recent visitors and non-visitors, distributed via a national panel provider.

Who? A total of 1,000 respondents. We specifically targeted those within a 2-hour drive time from Hertfordshire, as well as two other key metropolitan areas (Birmingham & Manchester). This broke down as:

- 618 Visitors / 382 Non-visitors
- 96 Hertfordshire residents / 904 Non-residents

How? The questionnaire was designed by Mustard, and signed off by Visit Herts. A ‘fair test’ was ensured for all Screen Tourism concepts, with each respondent seeing 5 concepts in total, in a randomised order.

When? Fieldwork ran for three weeks between June and July 2022



Sample: Location Data

TOTAL

1,000 recent /
potential visitors

96

**Hertfordshire
Residents**

904

Non-Residents

COUNTY OF ORIGIN



- 11%** Essex
- 11%** West Midlands
- 10%** Greater Manchester
- 10% Hertfordshire
- 9% Norfolk
- 7% Bedfordshire
- 6% Buckinghamshire
- 5% Cambridgeshire
- 4% Suffolk
- 1% Berkshire
- 1% Oxfordshire

REGION

52% East / SE England

27% London

10% North West

11% West Midlands

618

**Hertfordshire
Visitors**

382

Non-Visitors



Sample: Demographic Data

TOTAL

1,000 recent /
potential visitors

ETHNICITY

79% White
11% Asian
6% Black
4% Mixed / Multiple
ethnic groups

GENDER



Male:
40%



Female
60%

SOCIO-DEMOGRAPHIC

69%
ABC1*
31%
C2DE*

INCOME

13% Less than £20K HH
18% £20,000-29,999 HH
29% £30,000-49,999 HH
20% £50,000-74,999 HH
8% £75,000-99,999 HH
5% More than £100K HH

AGE

18-24: 7%	25-34: 26%	35-44 28%
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45-54: 19%	55-64 11%	65+ 9%
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*ABC1 = Supervisory, clerical, junior managerial job or higher
*C2DE = Skilled, semi-skilled manual labour jobs or unemployed



Headlines



Hertfordshire has strong appeal amongst young families, providing opportunity to promote the region's range of family-friendly activities and attractions. This will remain a key market when attracting new audiences, too.



Film & TV are not currently strong associations for non-residents. This represents a key opportunity for the project to ramp up the focus, and connect with other attributes.



Screen tourism attractions perform better if tied to a specific Film or TV show – create an immersive, full range of activities around this.



Don't be too restrictive with concepts. Specific age ranges or niche topics limit the appeal – make them for the whole family, or anybody with an interest in subjects no matter their age.

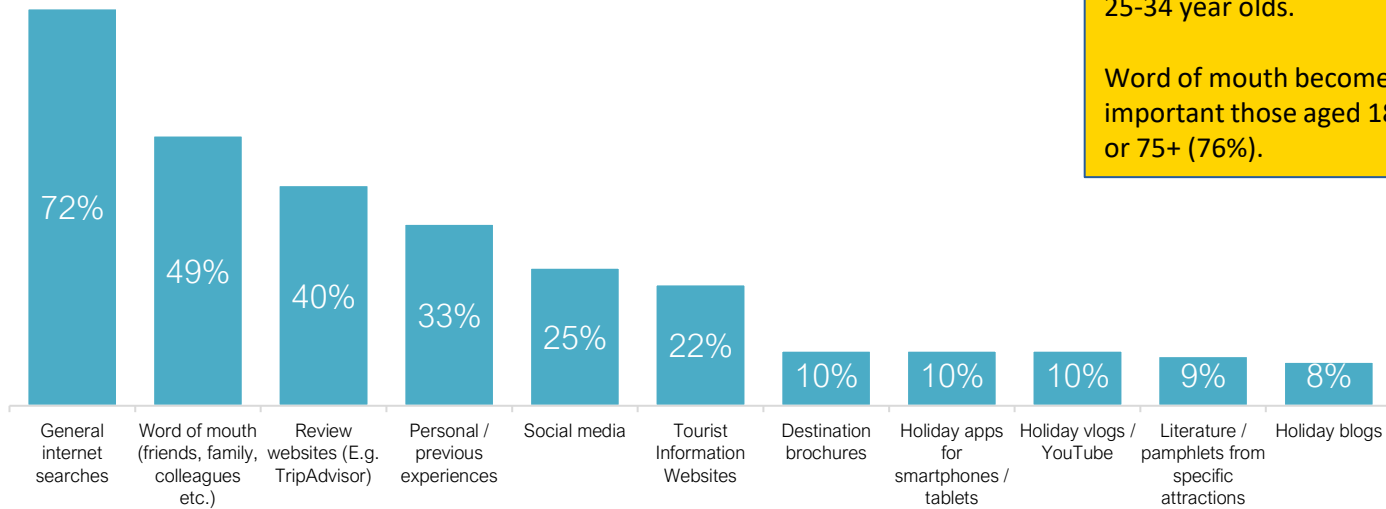
General Day-Trips & Short-Breaks





Aside from general internet searches, people look to more personalised sources when planning for short-breaks or day trips – word of mouth, reviews and personal experiences are important.

Typical sources for planning



Sources such as Social Media (36%), Holiday Apps (14%) and Vlogs (16%) are more common for 25-34 year olds.

Word of mouth becomes more important those aged 18-24 (61%) or 75+ (76%).

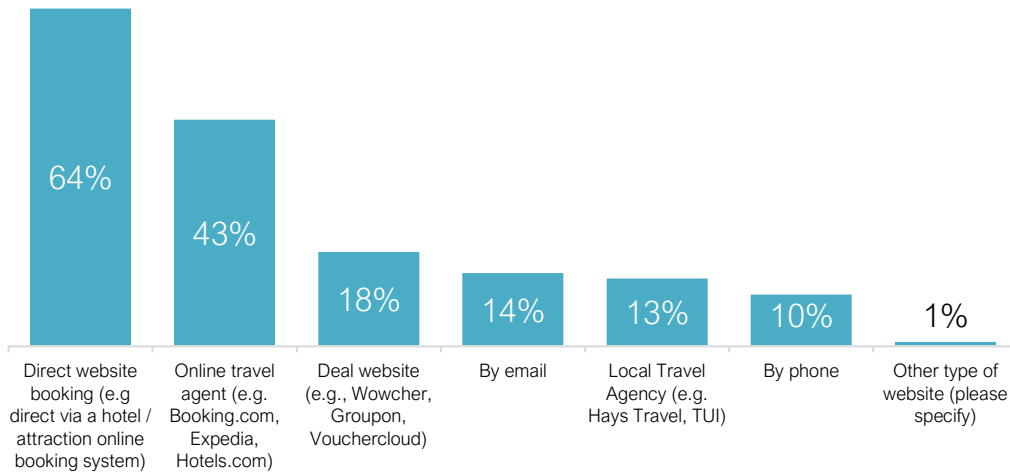
Base: Total sample - 1000

Q. Which of the following would you typically use to plan a day trip / short-break for leisure purposes to somewhere like Hertfordshire?



When it comes to booking, the preferred method is going direct – with nearly two-thirds booking this way. 2 in 5 book via online travel agents.

Typical sources for booking

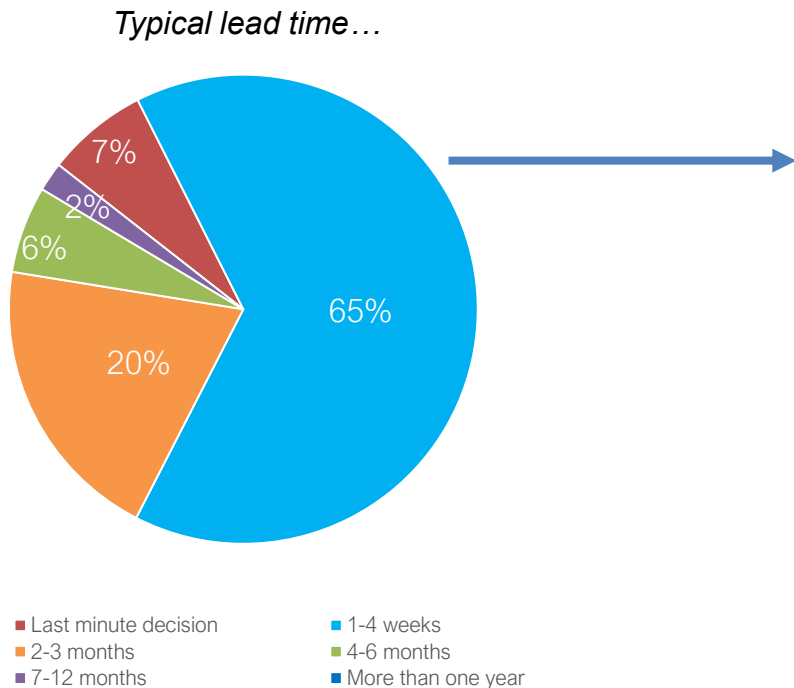


Hertfordshire residents are less likely to use online travel agents to book (23%).

Local Travel Agencies are used more by Early Families (21%), while Deal Websites are more prominent for Older Families (23%).



In terms of booking lead time, respondents expect future visits to Hertfordshire to be relatively spontaneous, booking within a month of their visit.



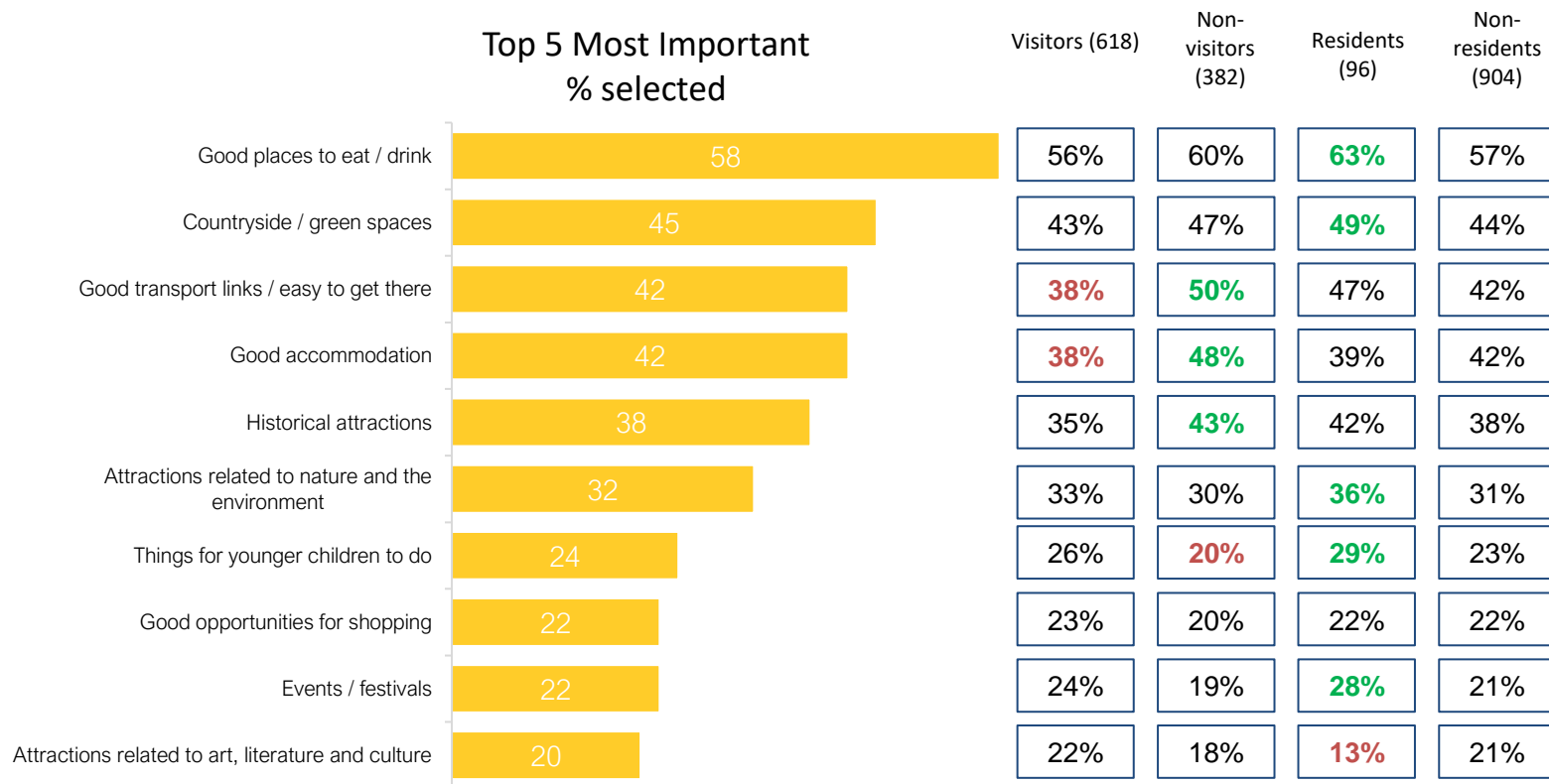
72%
**Would typically book
within a month prior to
visiting**

Unsurprisingly, Hertfordshire Residents are the most likely to be booking within one month (89%) of visiting, or last minute (19%).

Previous visitors who live outside Hertfordshire are less likely to book last minute (6%), but 70% would still book within one month.



For day-trips and short breaks in England generally, it's important to have good amenities and green spaces – with the former more important to non-visitors.

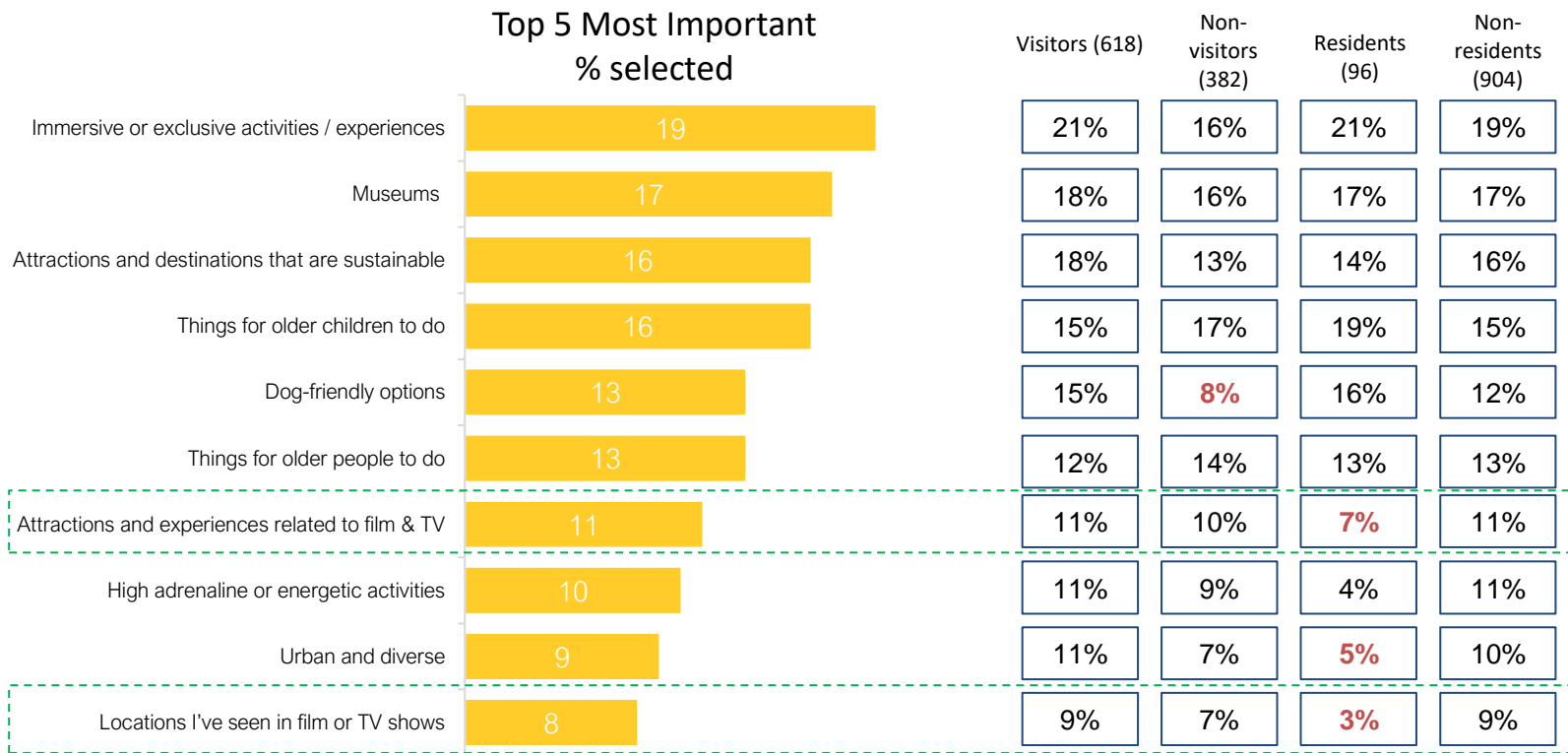


Base: Total – 1000 / Segments – in brackets

Q. Thinking about day trips and short-breaks in England for leisure purposes, what are the TOP 5 MOST IMPORTANT things to you?



With only a 'Top 5' chosen, it's encouraging to see Film & TV experiences selected by around 1 in 10 as something important to them when choosing destinations in England.



Base: Total – 1000 / Segments – in brackets

Q. Thinking about day trips and short-breaks in England for leisure purposes, what are the TOP 5 MOST IMPORTANT things to you?



Key Takeouts

- In line with many other categories nowadays, personalised sources are extremely important within travel. The desire for personal experiences from 'people like them' means incorporating social media influencers, review websites and case studies into the marketing mix is now a vital part of encouraging visits! Residents could prove key to this.
- Visits to Hertfordshire are likely to be relatively spontaneous – especially for Residents. However, even those who live outside Hertfordshire are likely to book within a month of the visit, leaving a relatively short window to target them.
- Film & TV experiences have a relatively strong baseline from which the project can build upon – around 1 in 10 chose it as something important to them when considering destinations. Encouragingly, this is just as important to Non-Visitors as it is to those who have previously visited Hertfordshire.
- High importance is placed on more practical elements such as food, drink, accommodation and travel – which should not be forgotten in messaging.

Hertfordshire Tourism

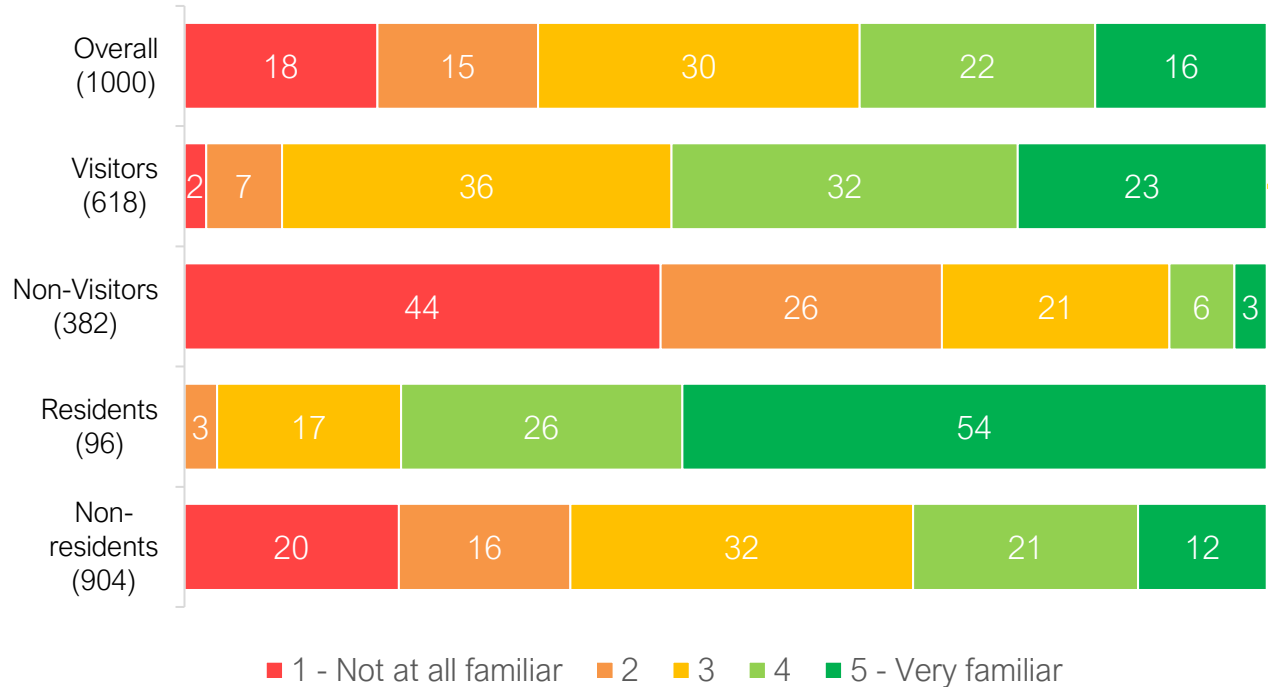
Previous Visits





Overall, around 2 in 4 feel familiar with Hertfordshire as a destination. Previous visitors feel more familiar, though less than a quarter feel very familiar.

Hertfordshire familiarity as day out / leisure trip destination



Despite having visited in the past 5 years, less than a quarter of Previous Visitors feel 'Very familiar' with Hertfordshire as a destination for day trips or short breaks.

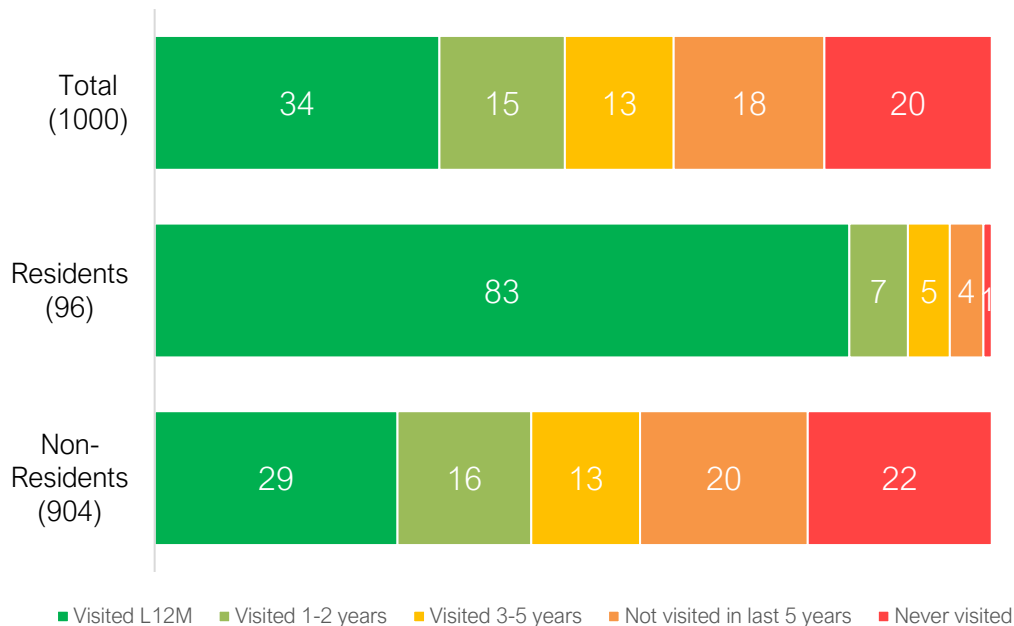
Base: In brackets

Q. On a scale of 1 to 5, with 1 being 'Not at all familiar' and 5 being 'Very familiar' how familiar would you say you are with Hertfordshire as a destination for a day out or leisure trip?



More than 3 in 5 (62%) have visited Hertfordshire in the last 5 years, with a third visiting in the past year. There's opportunity to better target Young Couples or Empty Nesters without children and boost visits.

Visits to Hertfordshire...



Visitors are likely to be affluent young families. They over index as families with children aged 0-11 (62%) with household incomes over £50K (39%).

When it comes to those who haven't visited, they are much more likely to be Young Couples (27%) or Empty Nesters (26%) with no children living in their household (53%). A fifth (20%) of non-visitors have a household income of less than £20K.

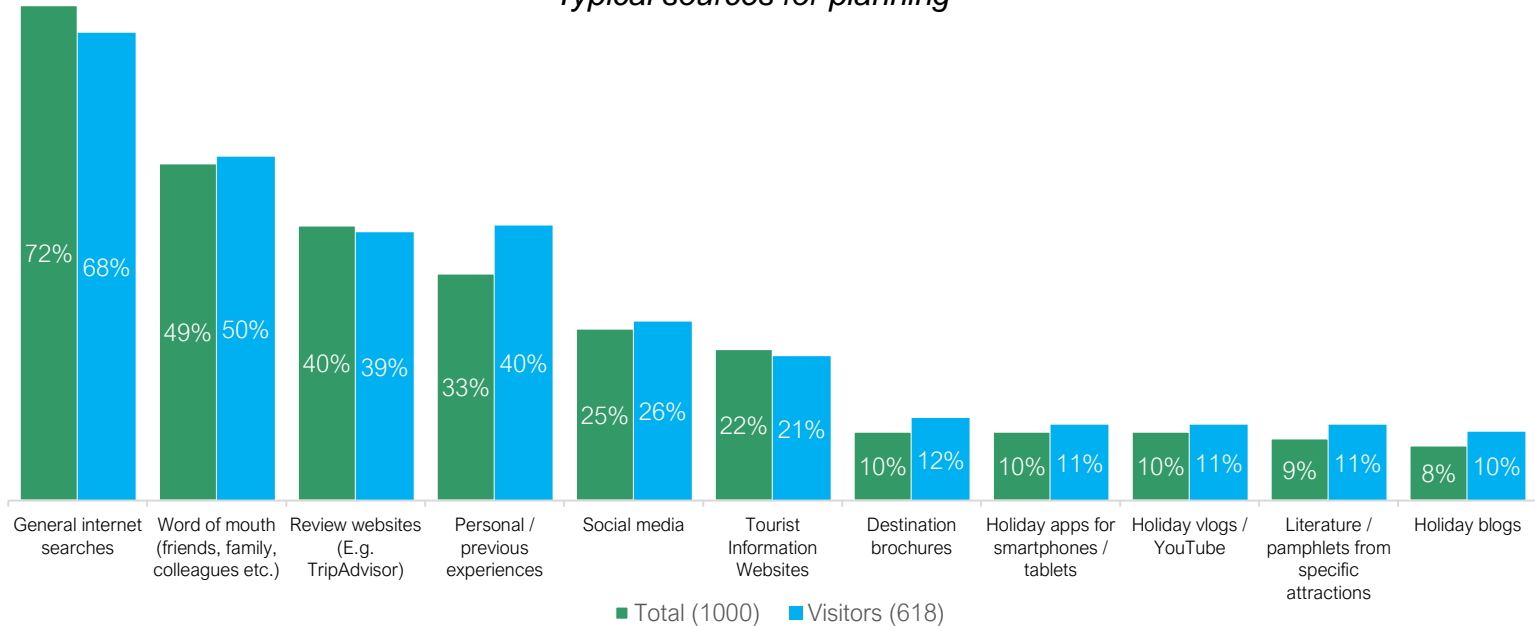
Base: In brackets

Q. Have you visited Hertfordshire for a day out, short-break or leisure purposes? If so, please tell us how recently. If Hertfordshire is your HOME region and you have had days out / short-breaks for leisure purposes, please include these.



Compared to the overall sample, Previous Visitors are more likely to be relying on Word of Mouth or Personal Experiences when planning a trip.

Typical sources for planning



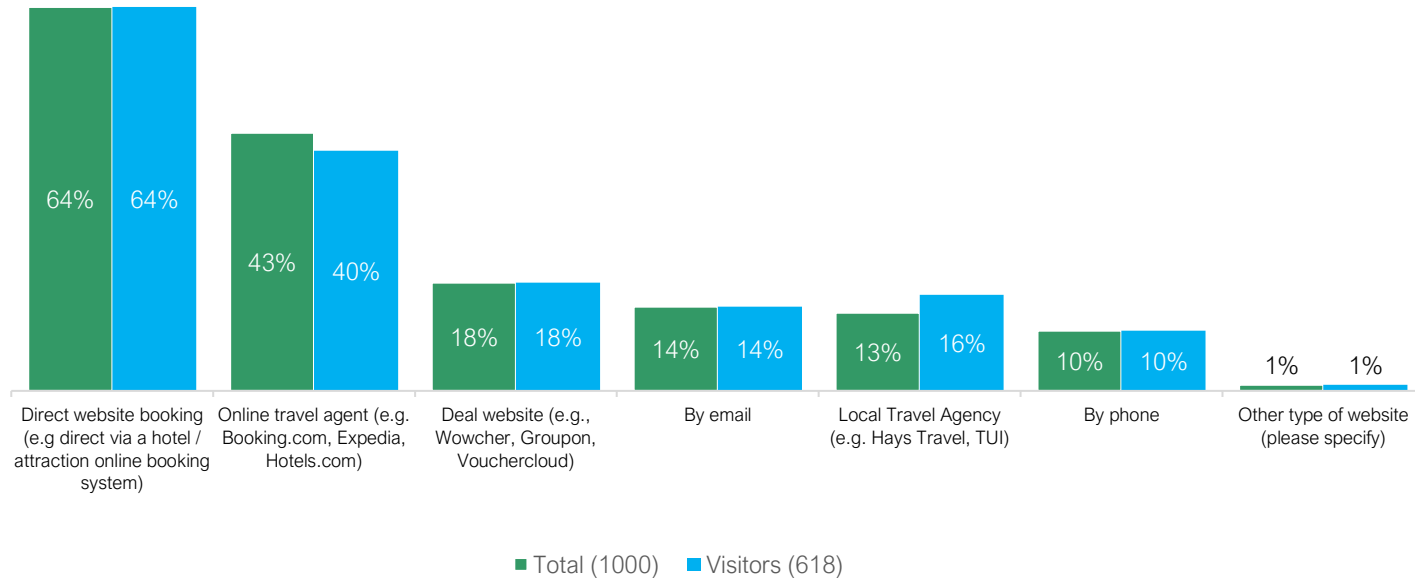
Base: Total sample - 1000

Q. Which of the following would you typically use to plan a day trip / short-break for leisure purposes to somewhere like Hertfordshire?



There's very little variance on booking sources, but Previous Visitors show signs of preferring Local Travel Agencies to Online Travel Agents.

Typical sources for booking



Base: Total sample - 1000

Q. How would you typically book or plan your day trip / short-break for leisure purposes to somewhere like Hertfordshire?



Previous visits to Hertfordshire...

Trip Characteristics...



50%
Day-trip



49%
Hotel



77%
By car



41%
Family Unit

Why did they visit...



34% Easy to get to



30% Beautiful place

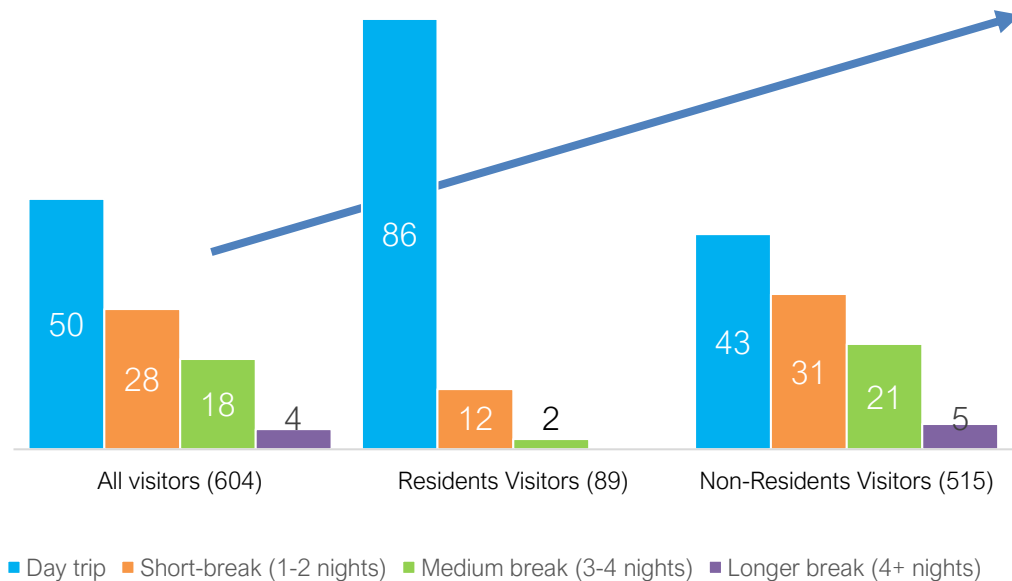


29% Green /
Countryside



Though Hertfordshire is seen primarily as a destination for shorter visits, 50% of Recent Visits were overnight – indicating there is enough to warrant longer stays.

Visitors – most recent visit type...



50%
Took a day trip to Hertfordshire

46%
Took a short / medium trip to Hertfordshire

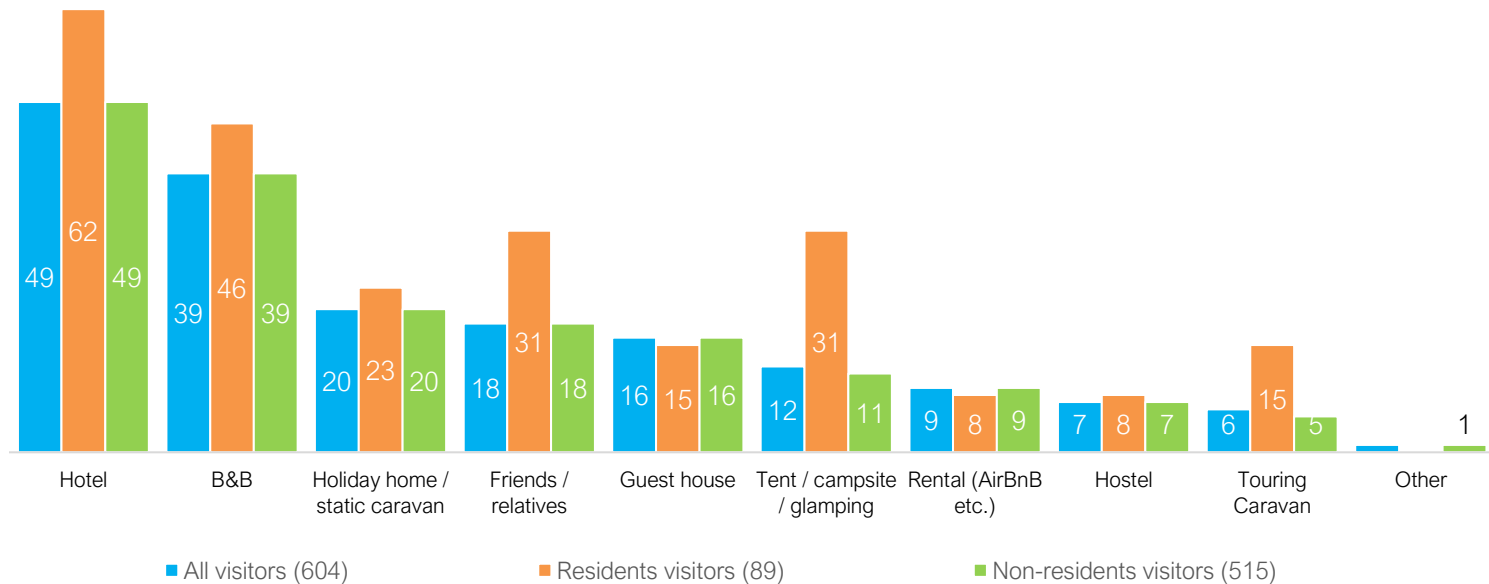
Those with children at a Primary (32%) or Secondary (31%) school age are more likely to have visited for 3+ nights.

Those who made overnight stays were more likely to be from London (30%), Norfolk (12%) and Essex (10%).



Hotels and B&Bs are the most popular accommodation type for Previous Visitors. Interestingly, Visitors prefer holiday homes and guest houses to Rental properties.

Visitors – accommodation type...



Base: In brackets – Hertfordshire visitors

Q. Thinking specifically about your most recent visit to Hertfordshire... What type of accommodation did you stay in?

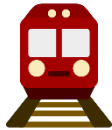


Previous Visitors are most likely to have come by car or train, and visited with their family or partner.

Travelled by...
(Multiple responses given)



77%
Car



25%
Train



11%
Bus / coach



4%
Taxi



2%
Motorbike



1%
Cycle

Visited with...



41%
Family Unit



34%
With
partner



9%
Alone / by
self



7%
Group of
friends



2%
Extended
Family



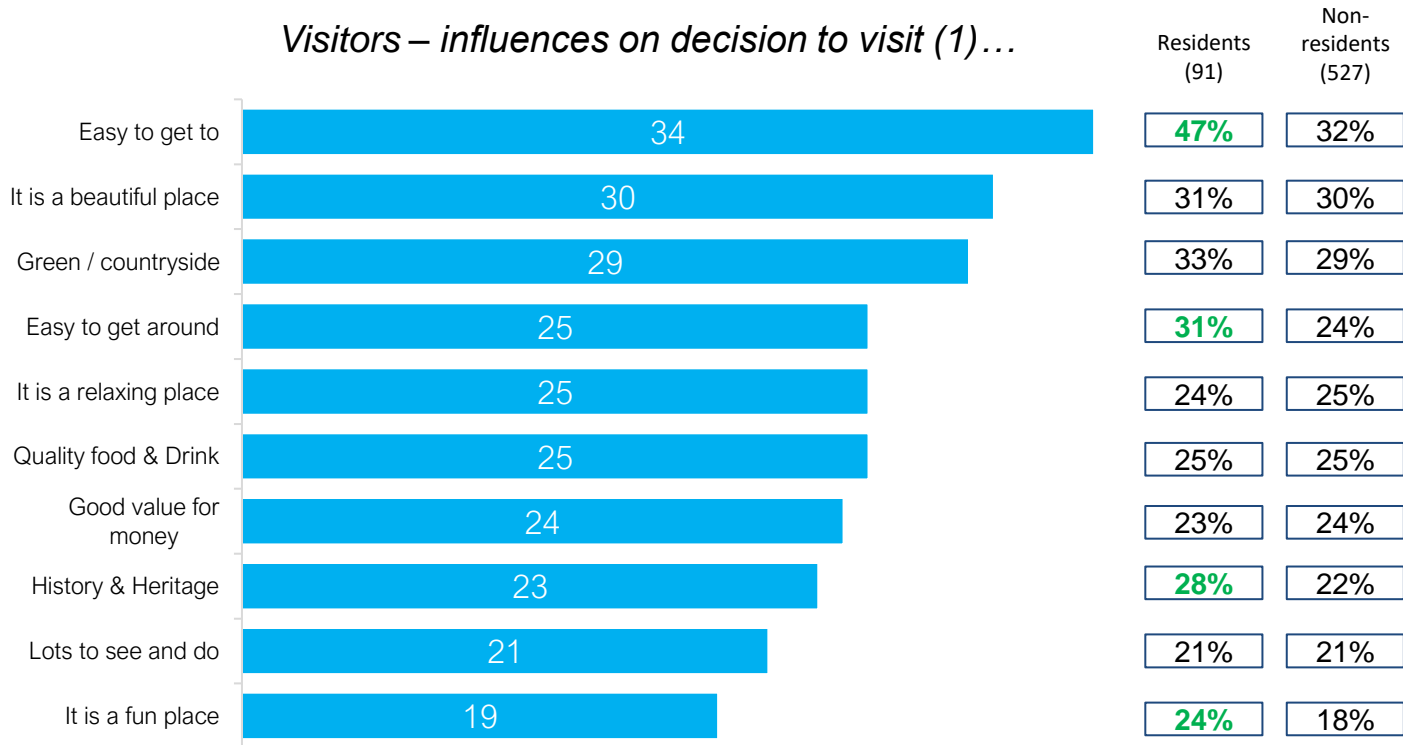
2%
Another
family



1%
Intergenerational



Visitors were mostly attracted by how easy Hertfordshire is to get to and around, as well as by the relaxing countryside location.



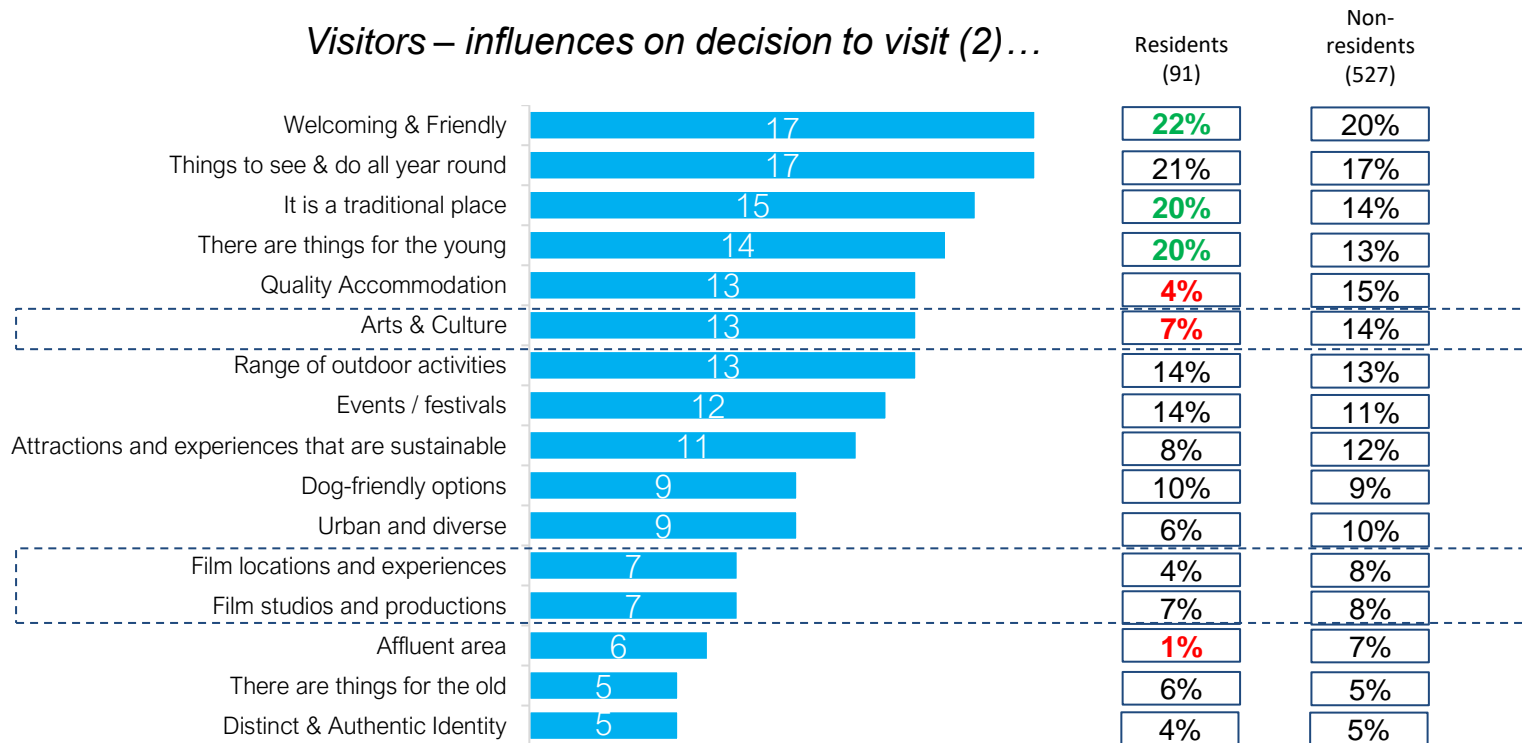
Base: 618 Hertfordshire visitors

Q. Thinking specifically about your most recent visit to Hertfordshire... Which of the following influenced your decision to have a day trip or short-break in Hertfordshire?



There's scope to improve on the pull that areas such as Arts, Culture & Film have for Hertfordshire. Part of this could be built into the region's identity, to help create a more distinct image that stands out from other destinations.

Visitors – influences on decision to visit (2)...





Key differences are apparent between lifestages. Young families look for fun activities, older visitors were influenced by relaxation and the history.

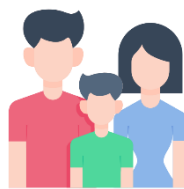


Early Families (children 0-4) more likely to have been influenced by...

Film Locations and Experiences
(12% vs. 7%)

It is a fun place
(31% vs. 19%)

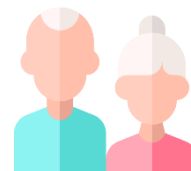
Range of outdoor activities
(24% vs. 13%)



Older Families (children 12-18) more likely to have been influenced by...

It is a beautiful place
(44% vs. 30%)

It is a relaxing place
(33% vs. 25%)



Older Couples / Empty Nesters more likely to have been influenced by...

Easy to get to
(46% vs. 34%)

History & heritage
(30% vs. 23%)



Hertfordshire visitors are largely satisfied with their most recent visit, with extremely low levels of dissatisfaction across all audiences.

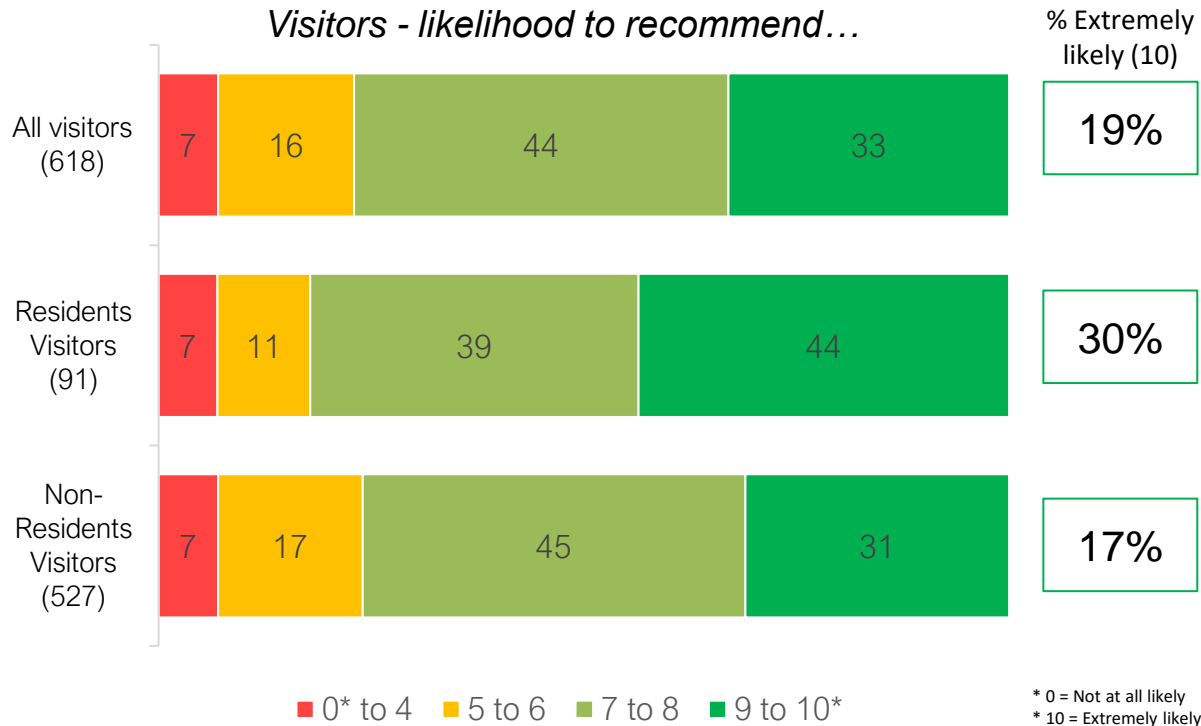


Base: In brackets - Hertfordshire visitors

Q. Thinking specifically about your most recent visit to Hertfordshire... Overall, how satisfied or dissatisfied were you?



Reflecting satisfaction, a third of visitors would recommend Hertfordshire as a destination to friends or family – with a fifth being extremely likely.

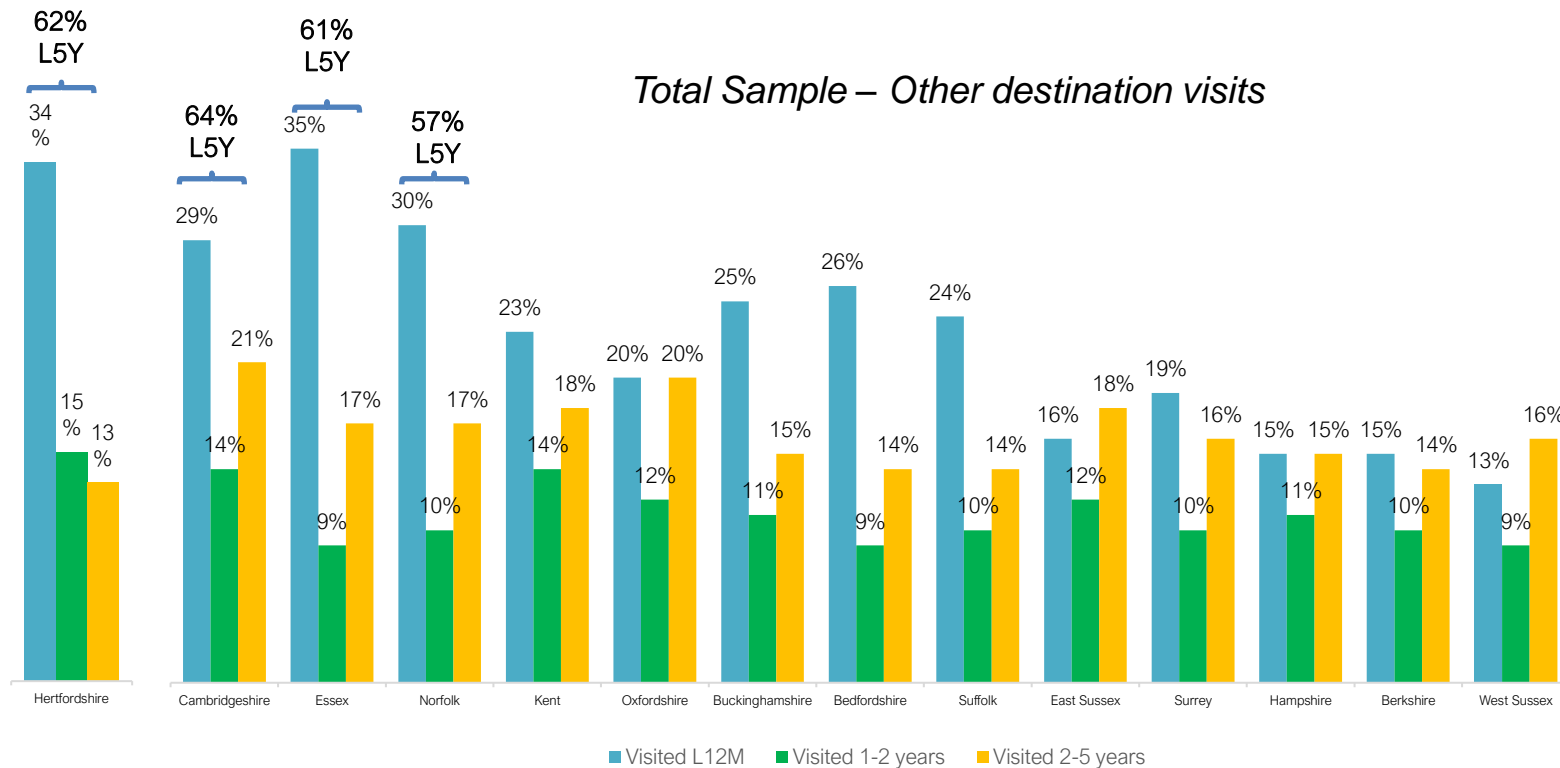


Early Families (40%), those aged 35-44 (37%) and Overnight visitors (37%) were all more likely to score 9-10 for recommendation.

Base: In brackets - Hertfordshire visitors
Q. Thinking specifically about your most recent visit to Hertfordshire... how likely is it that you would recommend Hertfordshire as a destination to friends or family?



Cambridgeshire, Essex and Norfolk are the most likely near by regions to have been visited in the past 5 years. More than a third visited Essex in the past year.



Base: Total Sample (1000)

Q. Thinking about past visits, for each of the following UK counties, please select the option that best applies to you.



Key Takeouts (1)

- With affluent young families being the most likely to visit, there's scope to push more attractions and messaging that speaks to parents and young children in particular.
- To attract a wider pool of visitors, more of a reason needs to be given as to why they should choose it over other destinations. This is about more targeted content and promotion of the activities and that do exist in Hertfordshire and already attracts strong crowds of visitors.
- With half of Previous Visitors taking overnight trips, it shows there is reason to stay on longer breaks. However, quality accommodation is not currently high up the list of reasons people visit – despite the existing quality of hotels in the area. The above point needs to be emphasised alongside content that promotes the high quality of accommodation already available in Hertfordshire.



Key Takeouts (2)

- Older audiences are less likely to visit Hertfordshire, but utilising their interest in history and heritage should catch their attention. This includes promoting the many great historic sites the destination has to offer, and packaging this interest with the screen tourism products that have strong historical links themselves.
- Key differences occur between lifestages. Fun, outdoor activities should be marketed to the main visitor demographic of young families. While more relaxing, countryside attractions can be targeted at middle-aged audiences and those with children of an older age.
- Film, arts and culture are not currently a strong influence for visiting Hertfordshire. However, there is certainly scope to increase the awareness of Hertfordshire as a film destination and focus on making film a key element of the county's identity to help stand out over near by competitor regions.

Hertfordshire Tourism

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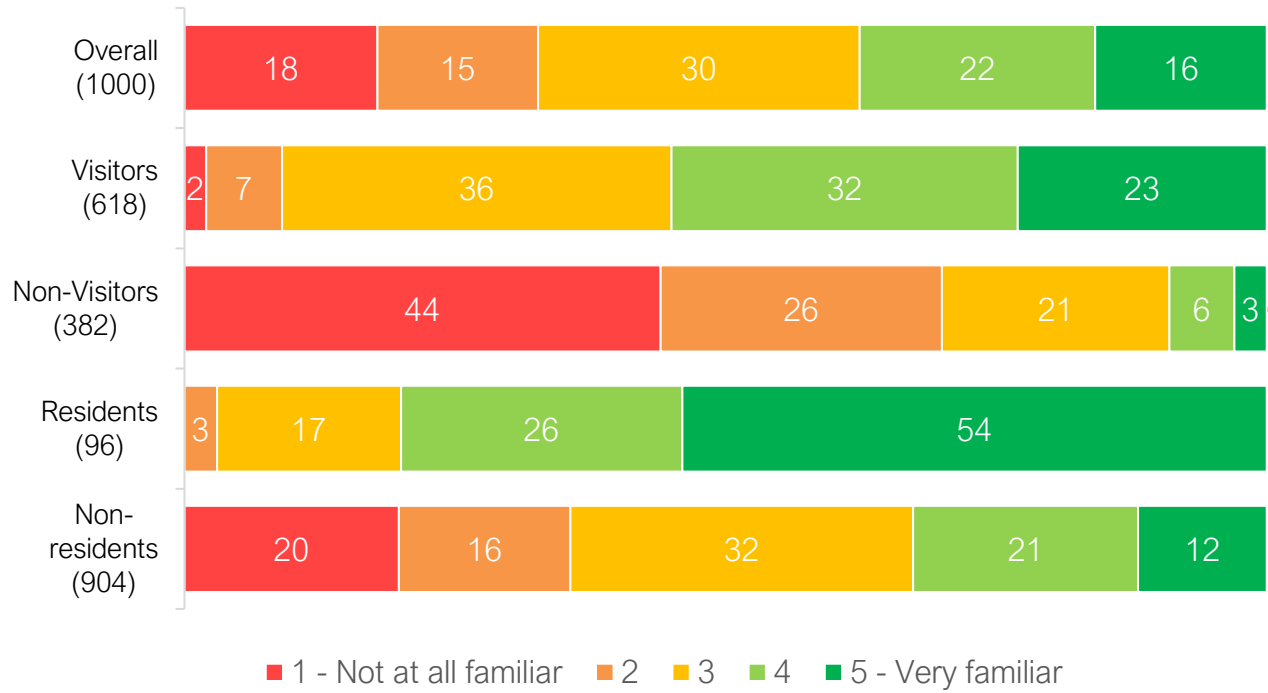
Non-Visitors





Non-Visitors feel very unfamiliar with Hertfordshire as a destination for day trips and short breaks. A barrier, but one that can be addressed.

Hertfordshire familiarity as day out / leisure trip destination



Only 9% of Non-Visitors feel familiar with Hertfordshire as a destination. More than 2 in 5 do not feel familiar with it at all.

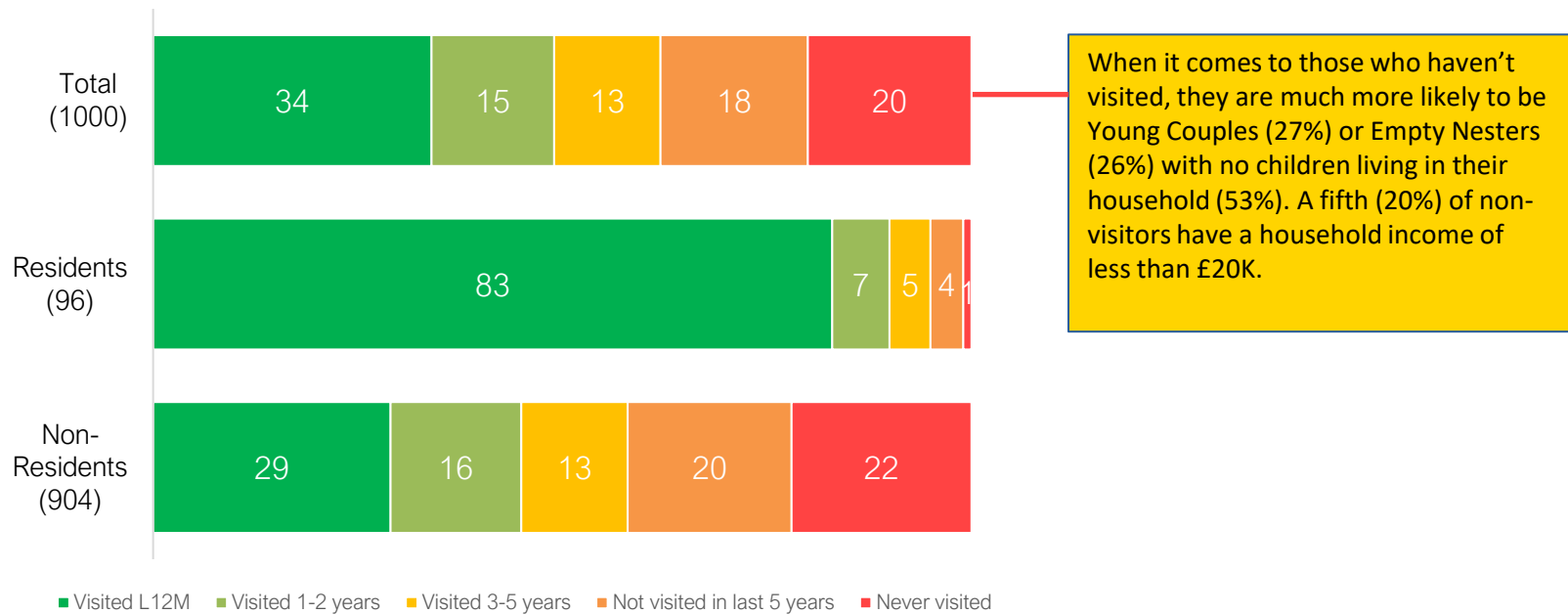
Base: In brackets

Q. On a scale of 1 to 5, with 1 being 'Not at all familiar' and 5 being 'Very familiar' how familiar would you say you are with Hertfordshire as a destination for a day out or leisure trip?



A fifth of the sample have never visited Hertfordshire. Non-Visitors are likely to be couples without children living at home, with less income than Previous Visitors.

Visits to Hertfordshire...



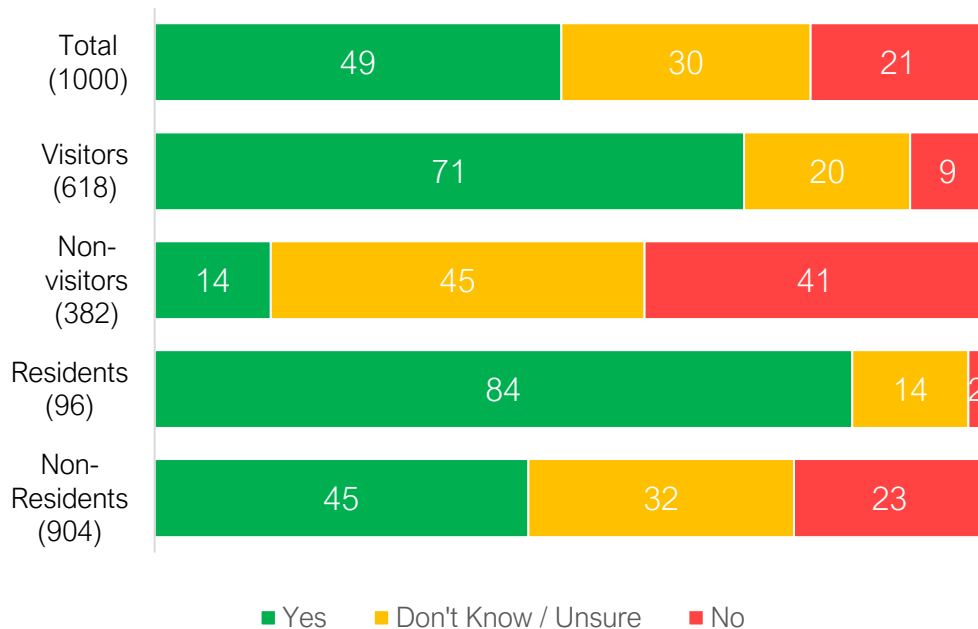
Base: In brackets

Q. Have you visited Hertfordshire for a day out, short-break or leisure purposes? If so, please tell us how recently. If Hertfordshire is your HOME region and you have had days out / short-breaks for leisure purposes, please include these.



Although only 14% of Non-Visitors are planning to visit Hertfordshire, nearly half are unsure – meaning there's still opportunity to encourage visits.

Planning to visit in the next 12 months...



Although 41% are not planning to visit, 45% of those who have not previously visited Hertfordshire are unsure on whether they would. This means there's still scope to sway their decision and encourage visits.

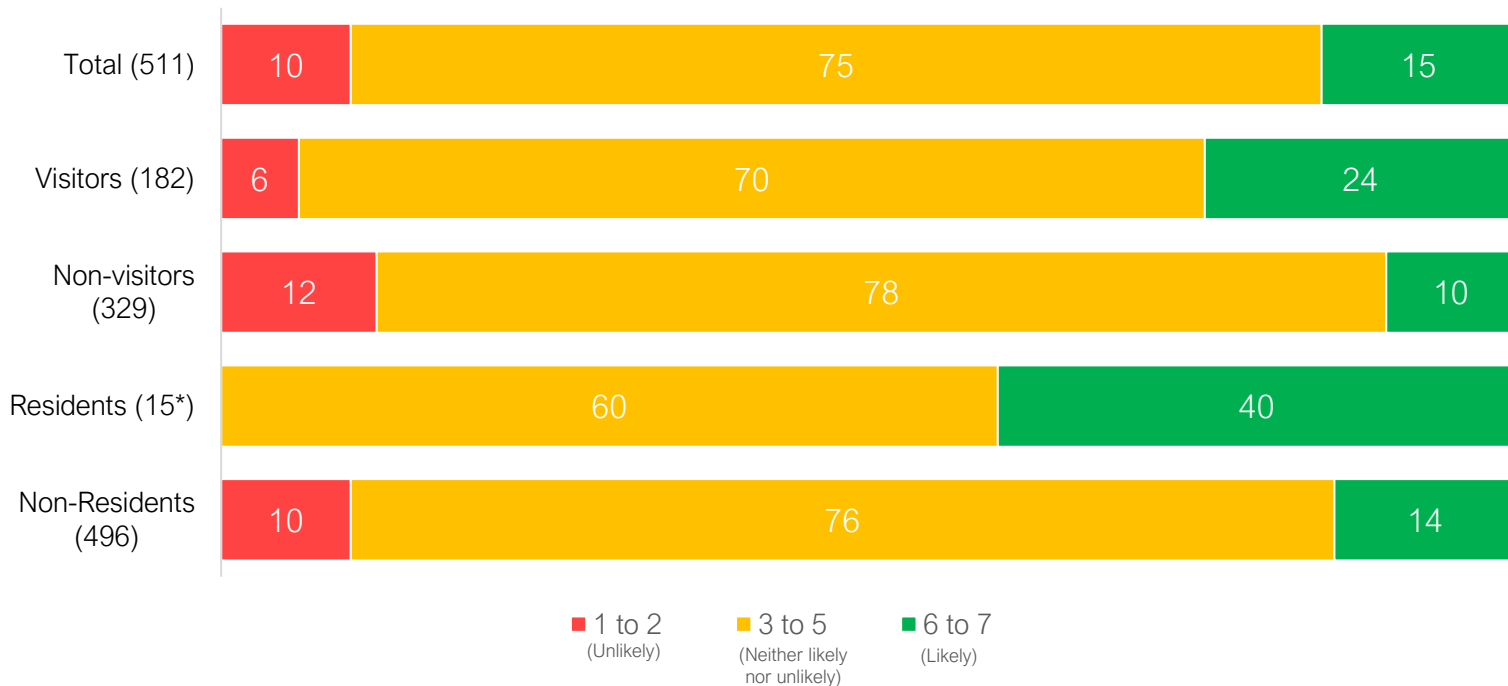
Base: In brackets

Q. Are you planning to visit Hertfordshire for a day out, short-break or leisure purposes in the next 12 months?



This is again apparent when we look at likelihood to visit, with just under 4 in 5 Non-Visitors being uncertain rather than outright rejecters of a visit to the region

Likelihood to visit in future...



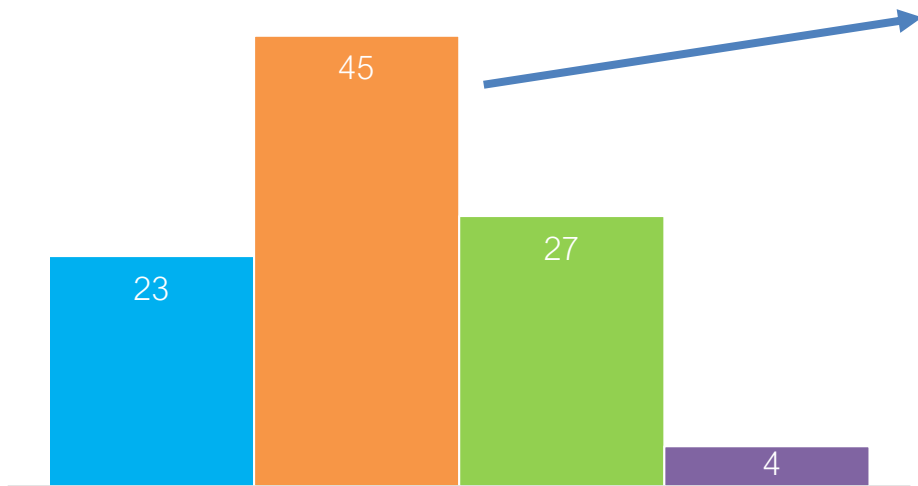
Base: In brackets – Those NOT planning to visit Hertfordshire

Q. please select how likely you would be to consider visiting Hertfordshire for a day out, short-break or leisure purposes in the future



Non-visitors are more likely to consider an overnight trip – with almost 4 in 5 choosing them. This likely correlates with the fact that they are more likely to live further afield.

Non-visitors – expected visit type...



All Non-visitors (361)

■ Day trip

■ Medium break (3-4 nights)

■ Short-break (1-2 nights)

■ Longer break (4+ nights)

77%

Would consider an overnight trip

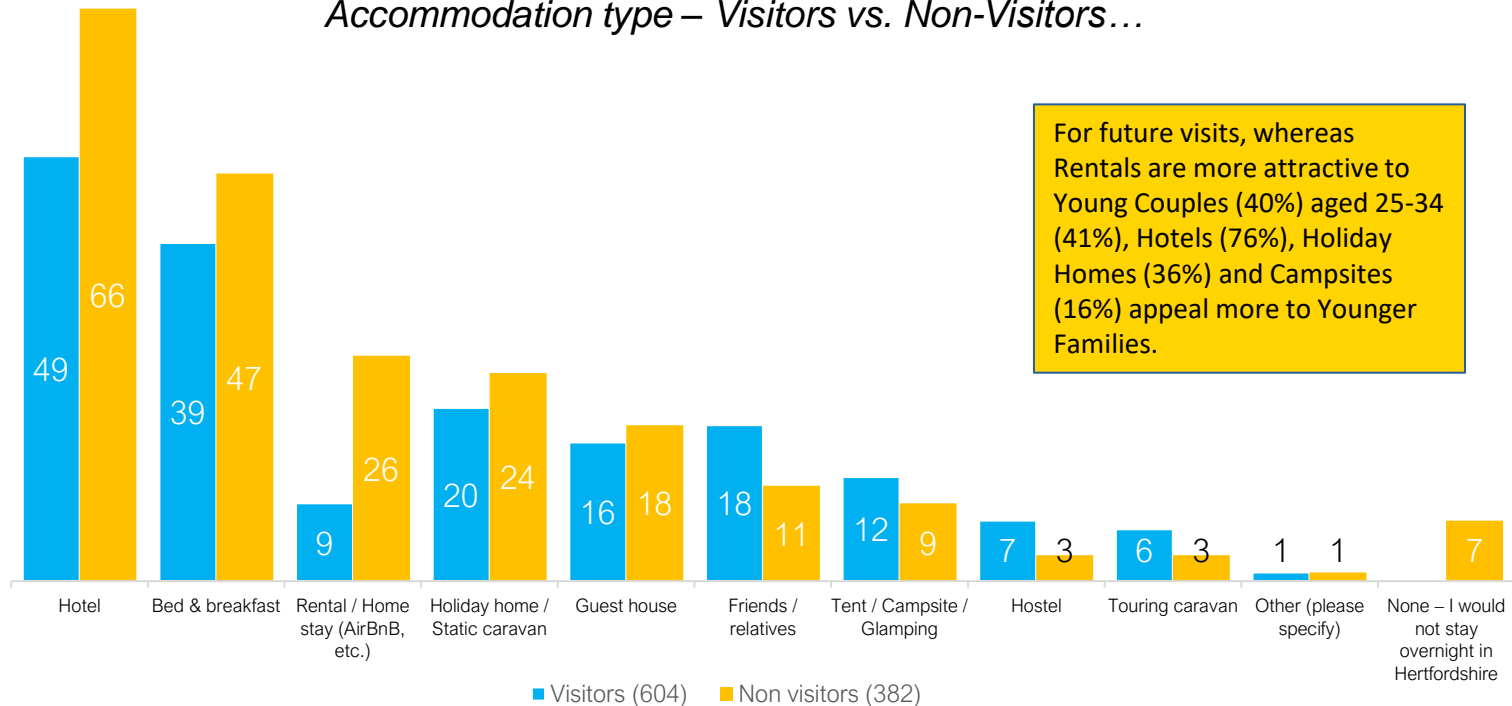
Young couples without children (86%) and those aged 25-34 (86%) are the most likely to consider staying overnight in Hertfordshire for future visits.

Non-visitors are more likely to be from North West (17% vs. 6% overall) and West Midlands (14% vs. 9% overall) regions, or further afield regions of the East of England like Norfolk.



Similarly, living further away means that Non-Visitors are more likely to consider hotels, B&Bs and Rental Homes for any future trips to Hertfordshire.

Accommodation type – Visitors vs. Non-Visitors...



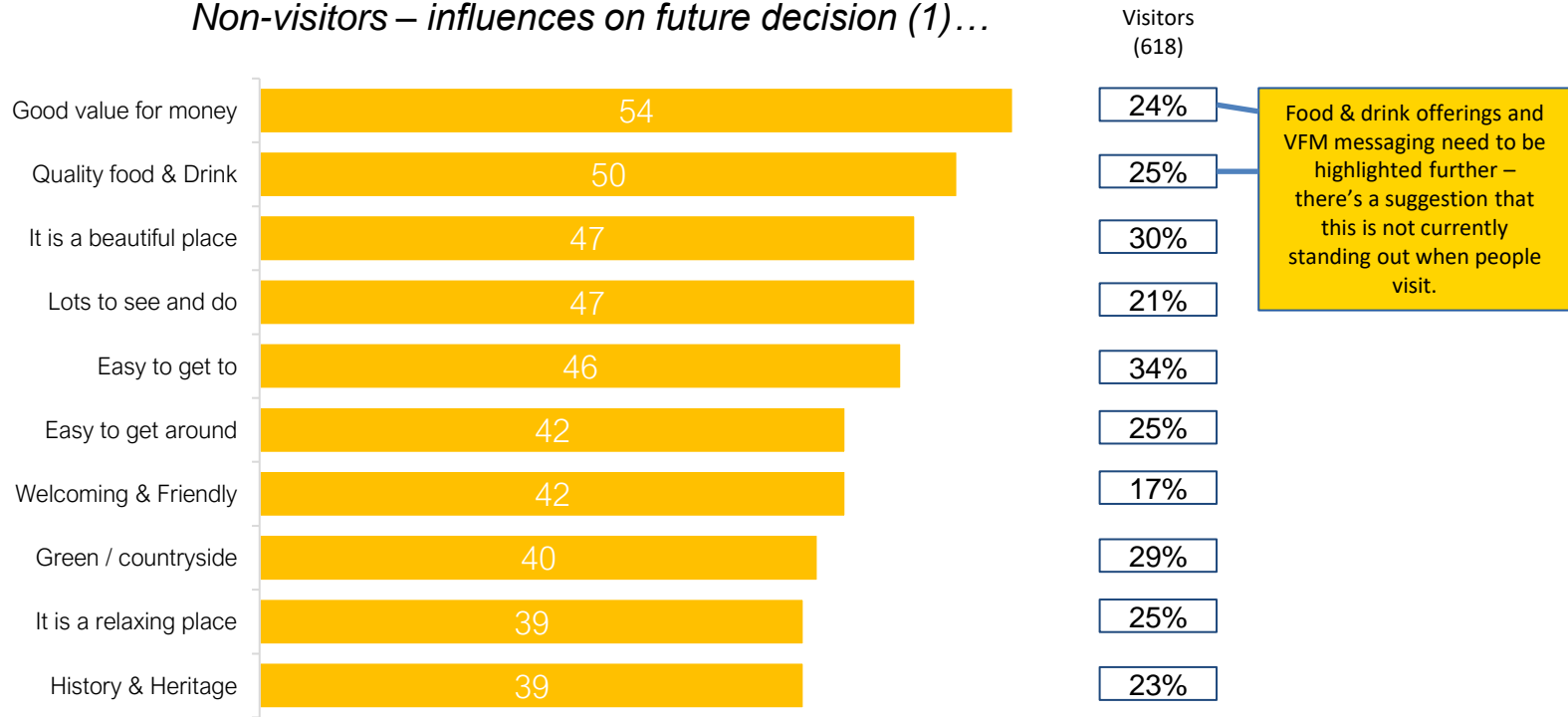
Base: In brackets

Q. Thinking specifically about your most recent / a potential future visit to Hertfordshire... What type of accommodation did / would you stay in?



Non-visitors would be more influenced by having many things to see and do – placing relatively less importance on accessibility and the relaxing countryside.

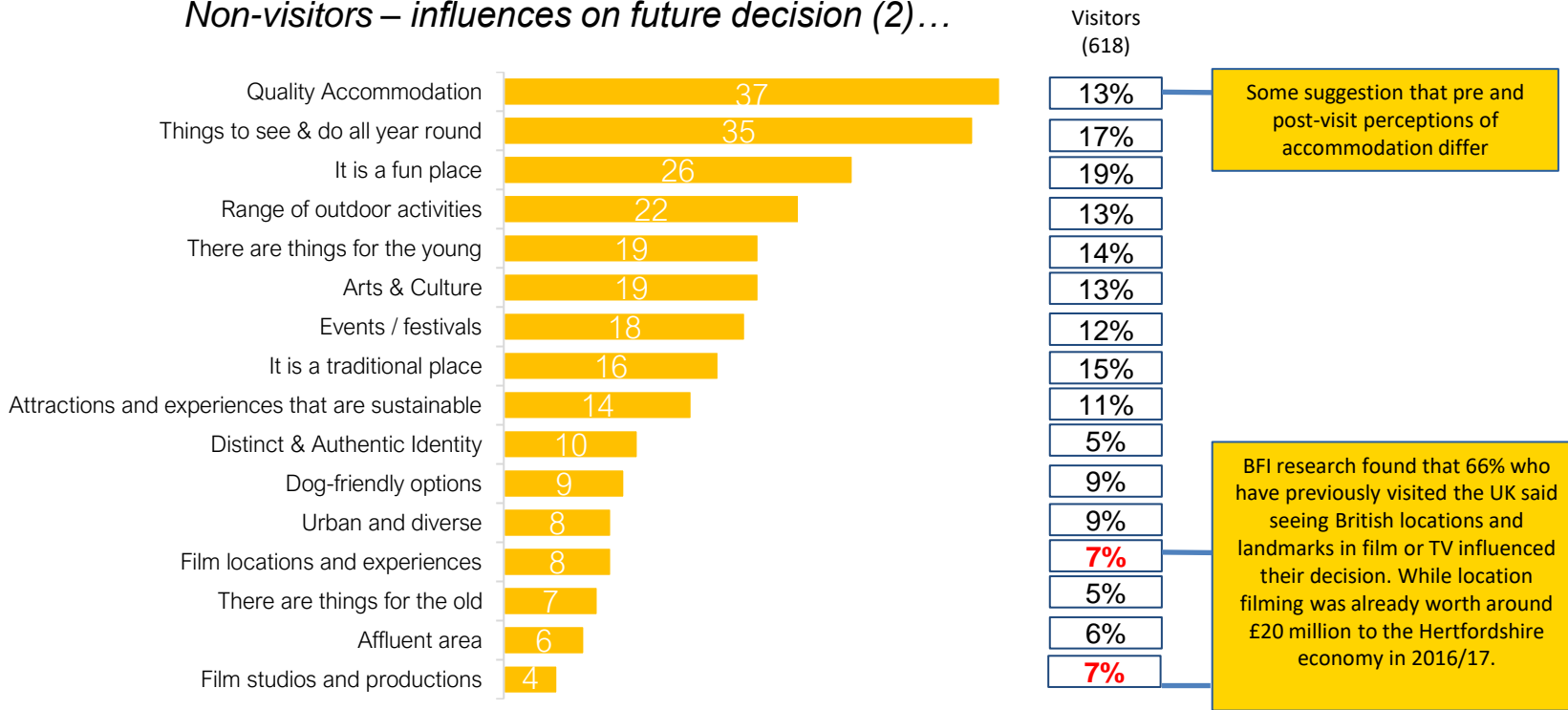
Non-visitors – influences on future decision (1)...





Though Non-Visitors say film studios and experiences would not have a great deal of influence on their visit – we know from wider research that there is great opportunity in the market, and especially for Hertfordshire.

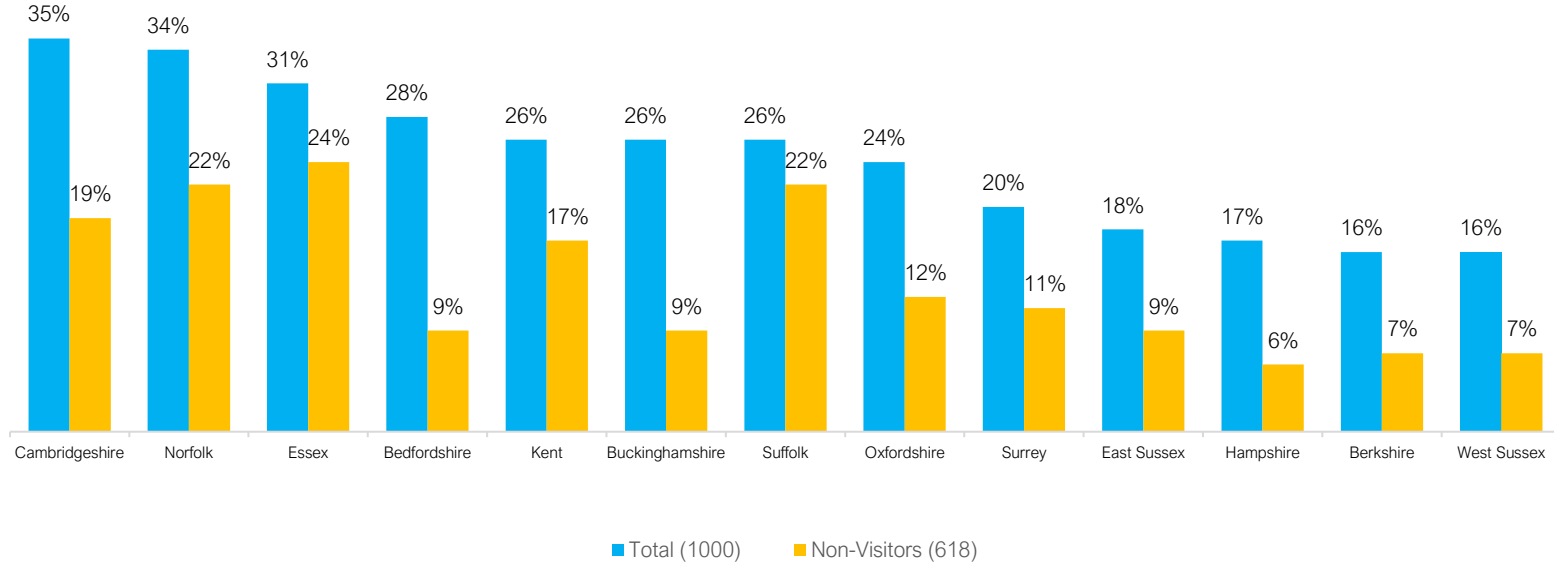
Non-visitors – influences on future decision (2)...





Looking at planned visits to surrounding regions, Essex, Norfolk and Suffolk are higher up the list for Non-Visitors. These are the main competitors for Herts.

Other destinations planning to visit



Base: Total Sample (1000)

Q. Now thinking about future visits. For each of the following UK counties, please select the option that best applies to you.



Key Takeouts (1)

- In looking to attract new audiences, there is an opportunity to better target those without children – Young Couples and Empty Nesters in particular, who have not yet visited and are less likely to be planning a visit.
- With 45% undecided on a destination, there is an opportunity to influence their decision. However, Non-Visitors feel unfamiliar with Herts as a destination, and need to be targeted with messaging that shows the range of things to see and do in the area. Food, drink and accommodation would influence their decision – and they need to see that there's lots to see and do.
- Likely to be living further afield, accommodation will play more of a factor for Non-Visitors as they would be more likely to consider a short or medium break rather than an overnight trip. They need inspiration from the quality accommodation that is on offer, but also in terms of all the things there are to do in the region that **warrant** a longer trip.

Hertfordshire Tourism

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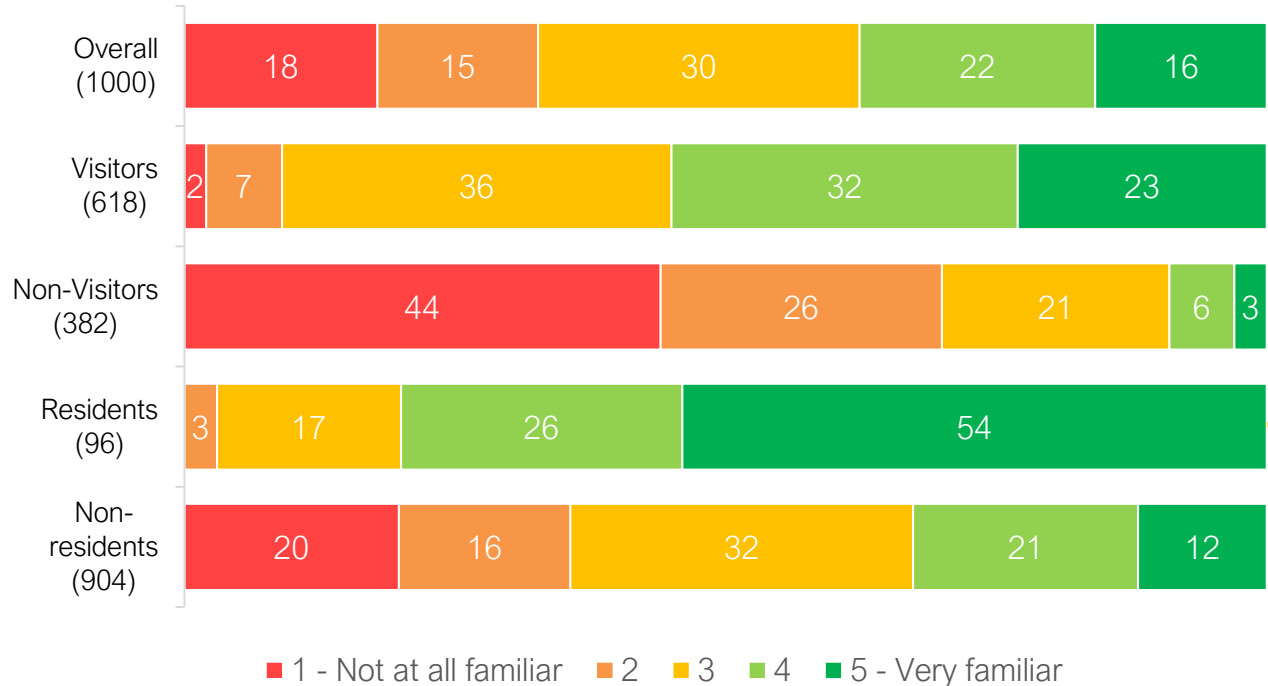
Hertfordshire Residents





Considering they live in the area, Resident awareness of Herts as a destination is low. There's a need to promote days and experiences out at a hyper local level.

Hertfordshire familiarity as day out / leisure trip destination



Resident awareness is low, considering they live in the area. This can be improved by further promoting days out and experiences to the hyper local audience.

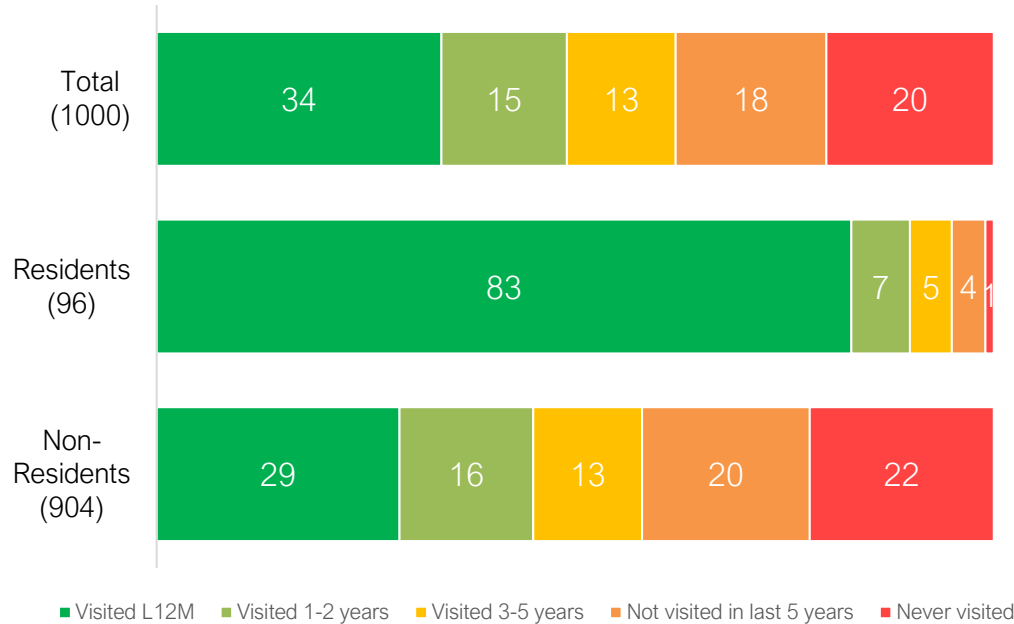
Base: In brackets

Q. On a scale of 1 to 5, with 1 being 'Not at all familiar' and 5 being 'Very familiar' how familiar would you say you are with Hertfordshire as a destination for a day out or leisure trip?



As would be expected, the vast majority of Residents claim to have visited the region for a day out or short-break within the past year.

Visits to Hertfordshire...



There is always scope to improve this further, seeing as 10% say they have not visited for a day out, short-break or leisure purposes for the past 3 years or more.

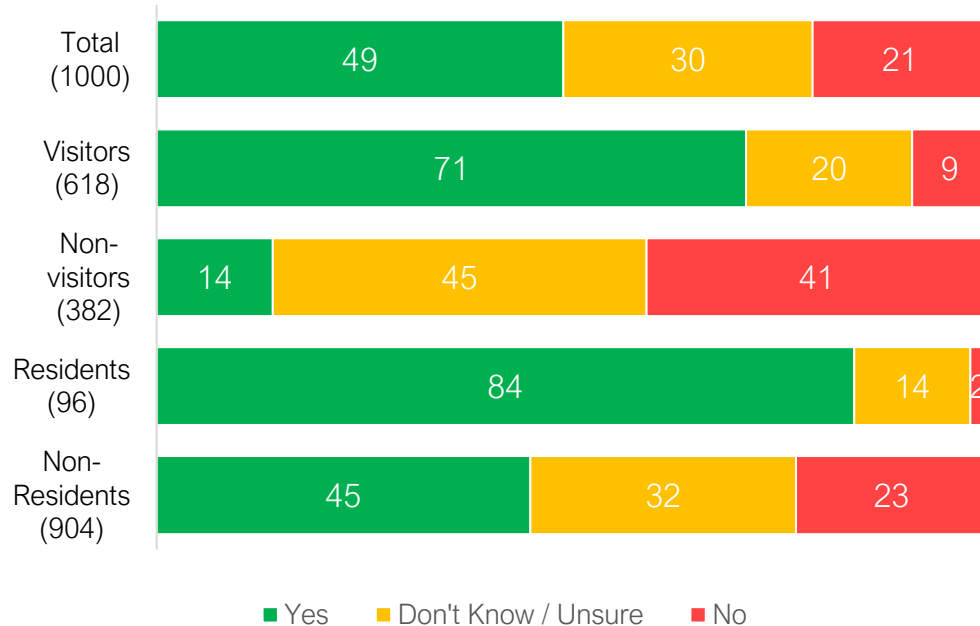
Base: In brackets

Q. Have you visited Hertfordshire for a day out, short-break or leisure purposes? If so, please tell us how recently. If Hertfordshire is your HOME region and you have had days out / short-breaks for leisure purposes, please include these.



Similarly, 84% of Residents say they are planning to visit in the next 12 months – but there's still a large proportion who can be targeted with local experiences.

Planning to visit in the next 12 months...

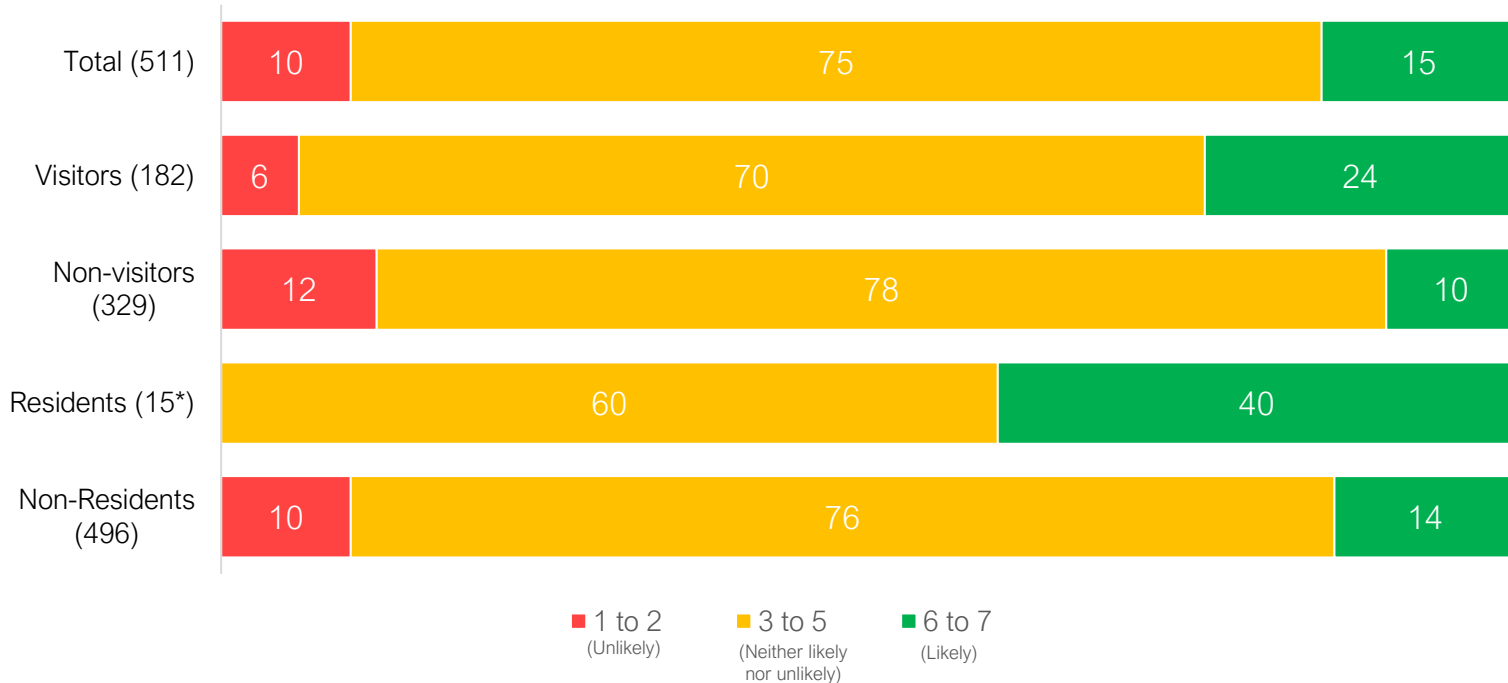


14% of Residents are unsure if they will visit the region for a day out or short-break in the next 12 months. More can be done to promote local experiences and days out.



Of those not already planning a trip in the next 12 months, no Residents say they would be unlikely to do so in the future.

Likelihood to visit in future...



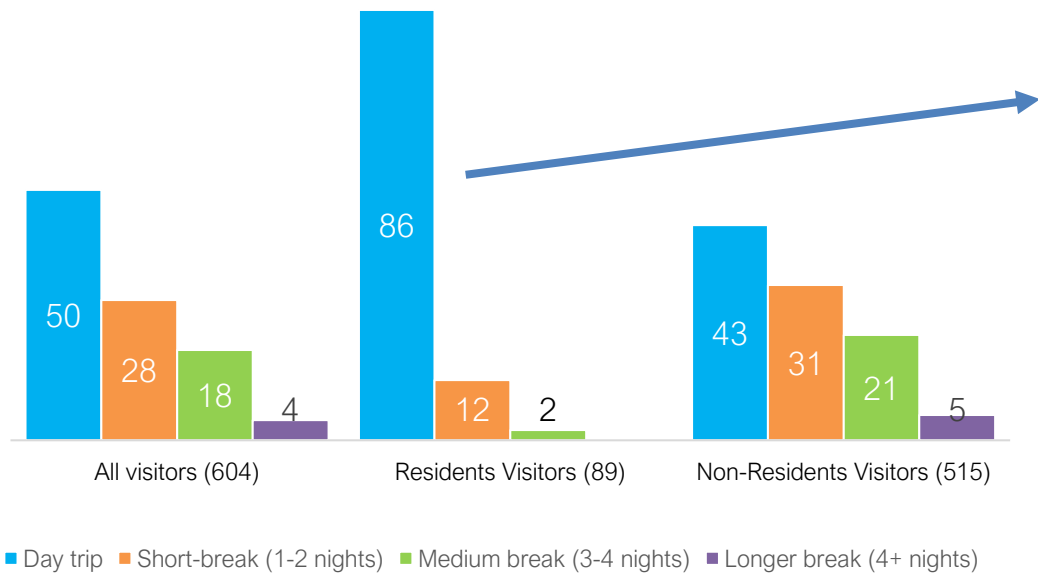
Base: In brackets – Those NOT planning to visit Hertfordshire

Q. please select how likely you would be to consider visiting Hertfordshire for a day out, short-break or leisure purposes in the future



Due to their locality, Residents are much more likely to only visit Hertfordshire for day trips. Overnight stays are much less common.

Visitors – most recent visit type...



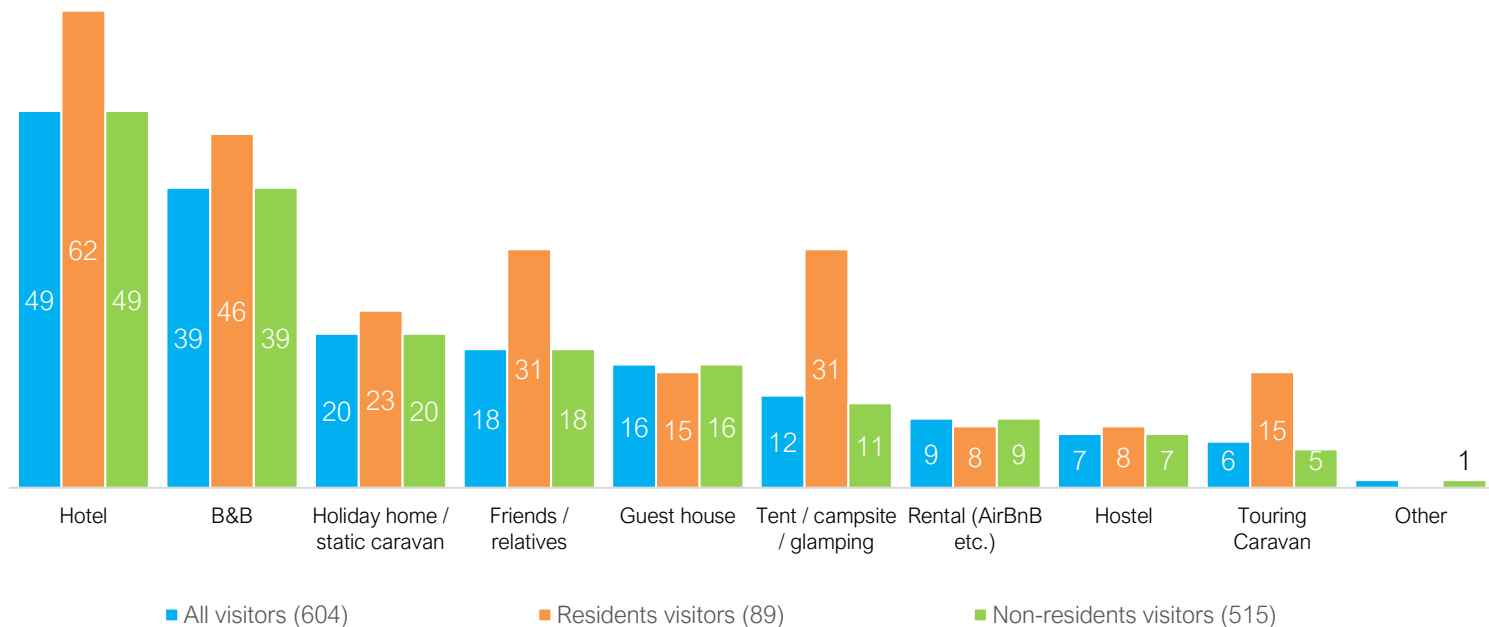
86%
Took a day trip to Hertfordshire

14%
Took a short / medium trip to Hertfordshire



Due to this, Residents are much more likely to have stayed with friends and relatives. There's also an increase in camping, likely seen as a more 'adventurous' trip that is close to home.

Accommodation type...

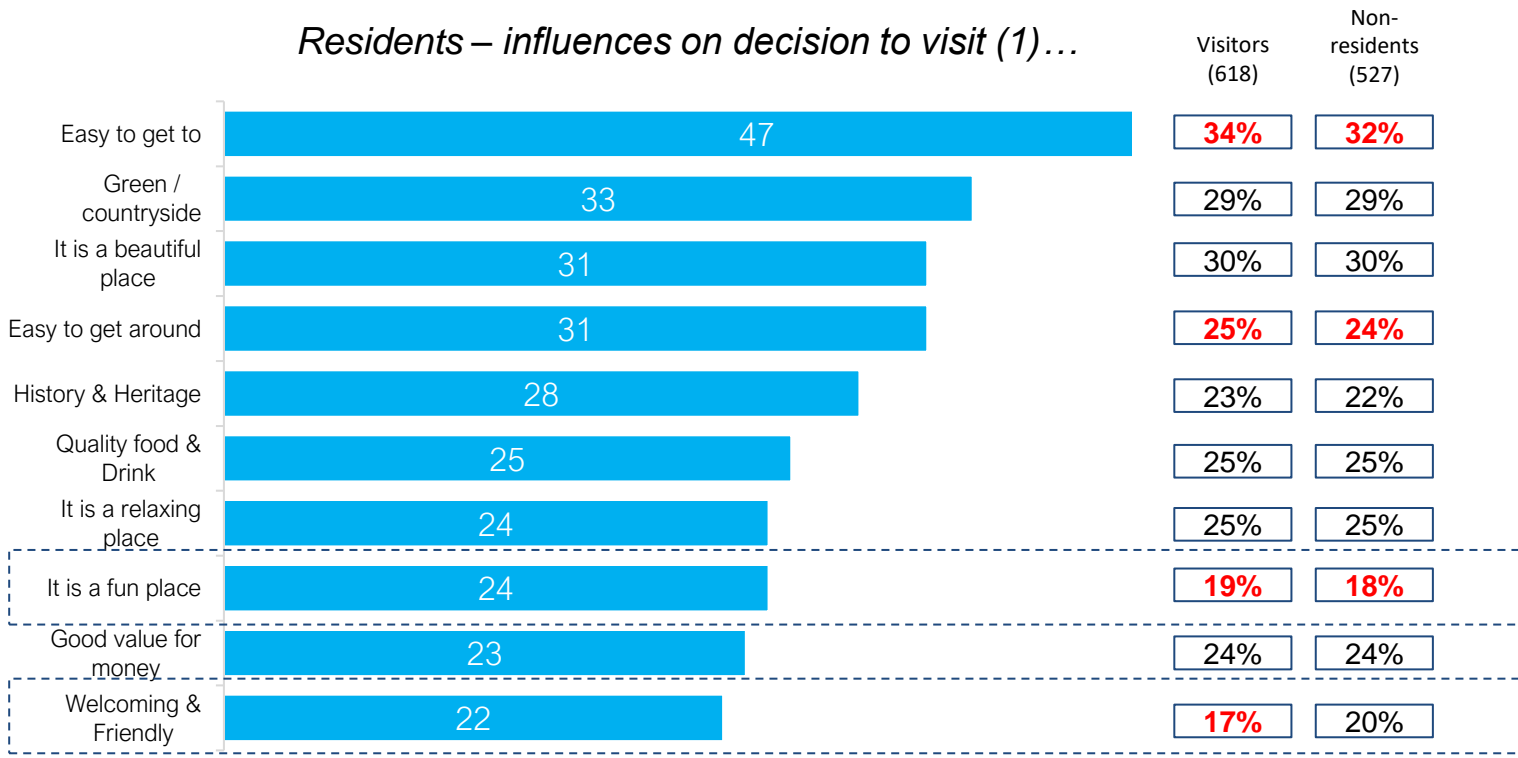


Base: In brackets – Hertfordshire visitors

Q. Thinking specifically about your most recent visit to Hertfordshire... What type of accommodation did you stay in?



Aside from locality, Residents are more likely to be influenced by the idea of it as a fun, welcoming & friendly destination – and can be used as promoters.



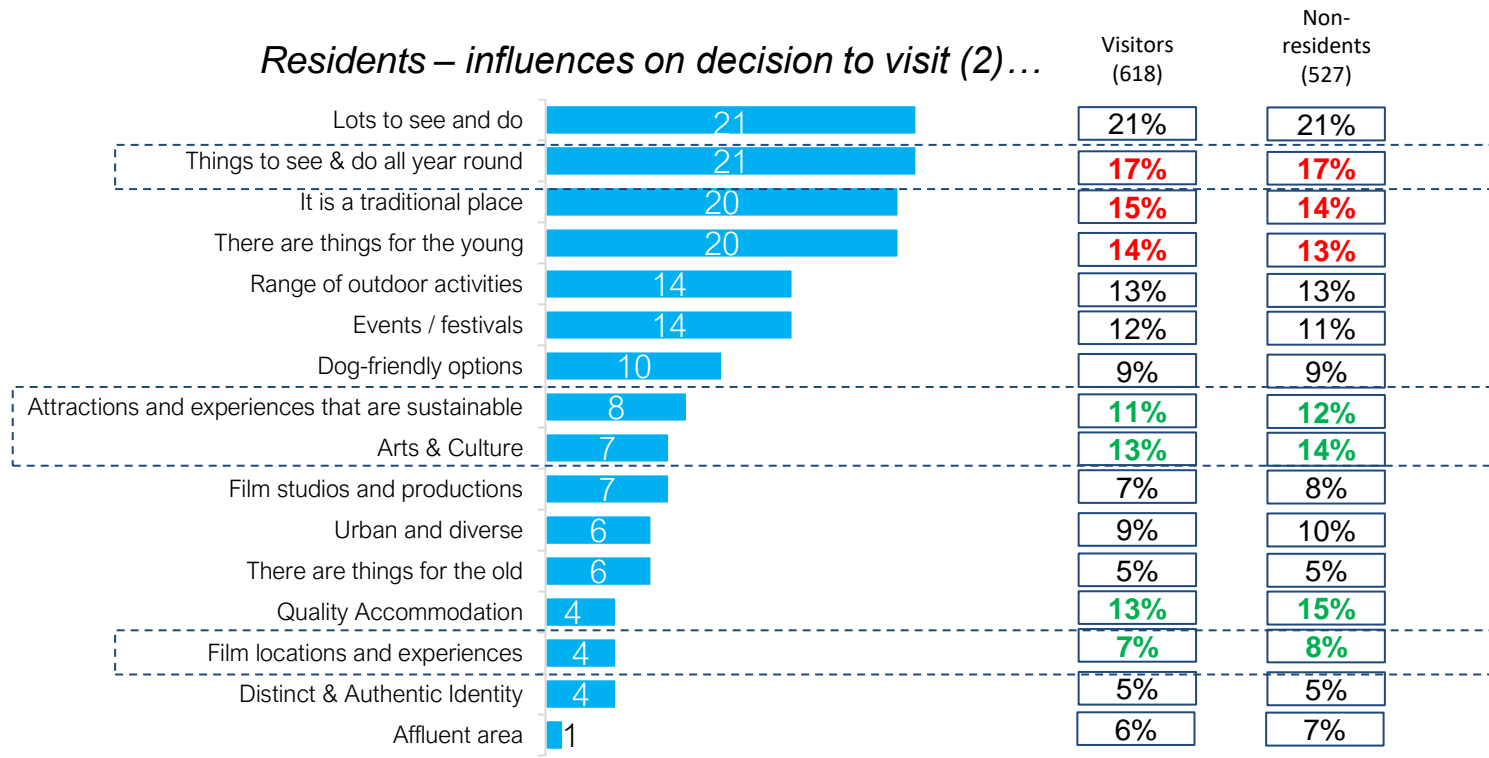
Green % = notably higher than residents
Red % = notably lower than residents

Base: 618 Hertfordshire visitors / 91 Hertfordshire Residents

Q. Thinking specifically about your most recent visit to Hertfordshire... Which of the following influenced your decision to have a day trip or short-break in Hertfordshire?



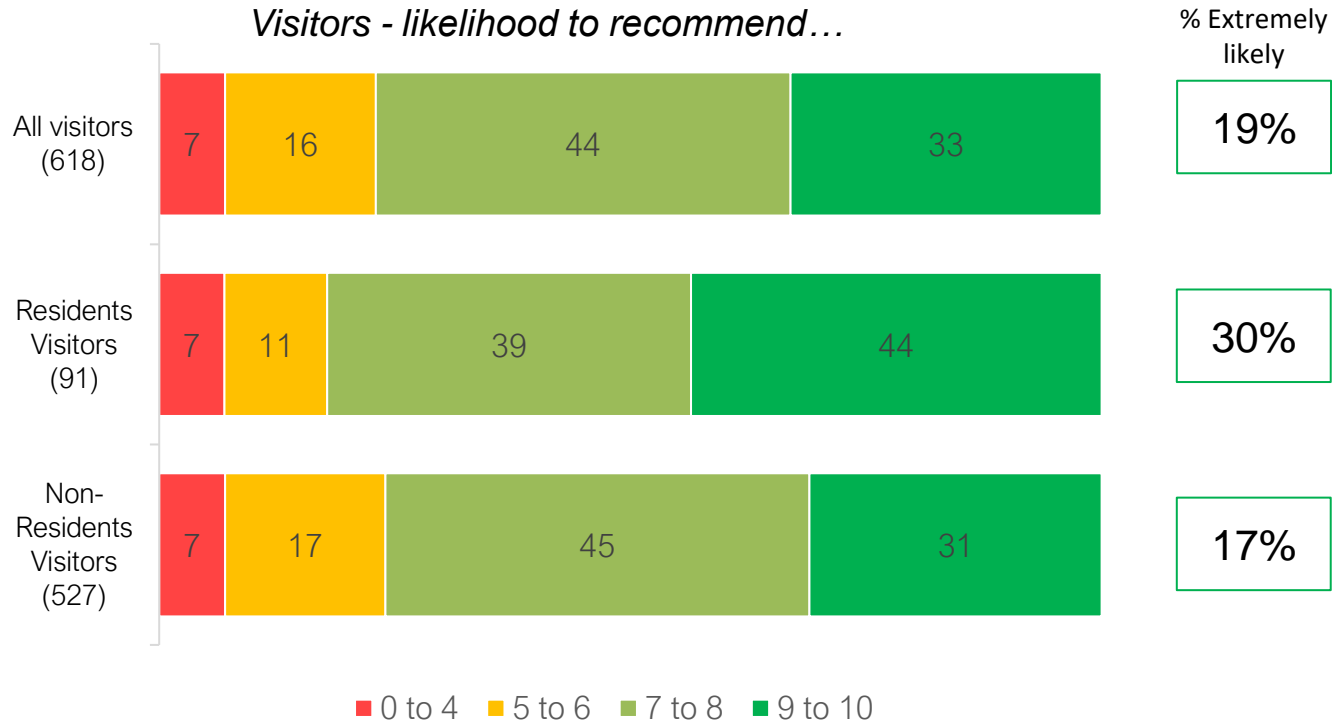
Residents see that there are things to see & do all year around, but are relatively less likely to be influenced by events, experiences, screen tourism & sustainable attractions.



Green % = notably higher than residents
 Red % = notably lower than residents



Residents are very likely to recommend Hertfordshire as a destination – suggesting they could be key promoters of the region to encourage more visits.



Base: In brackets - Hertfordshire visitors

Q. Thinking specifically about your most recent visit to Hertfordshire... how likely is it that you would recommend Hertfordshire as a destination to friends or family?



Key Takeouts

- Living in the region means some Residents may not see it as a destination for days out. More hyper local content and messaging could remove this barrier and keep Residents visiting closer to home.
- Part of this could be promoting more ‘adventurous’ accommodation types such as local camping sites to them, enhancing their trip and giving more reason to stay local.
- Residents are more likely to see the ‘fun’ and ‘welcoming’ side of Hertfordshire, and see it as a place with lots to see and do. They are influenced by attributes beyond accessibility and countryside, and should be used as promoters for the region wherever possible. This is particularly important when we know the strong influence of personal experiences.

Hertfordshire Tourism

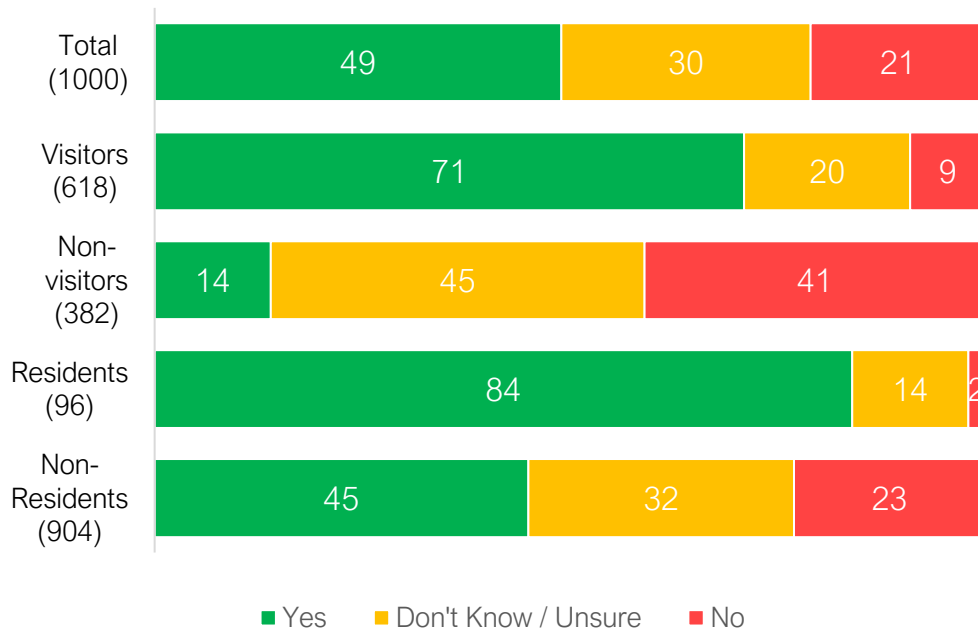
Future Visits





Overall, nearly half of respondents are planning a visit to Hertfordshire. There are likely to be more local and repeat visits (rather than brand new visitors).

Planning to visit in the next 12 months...



The makeup of those who are / aren't planning to visit is much the same as recent visitors.

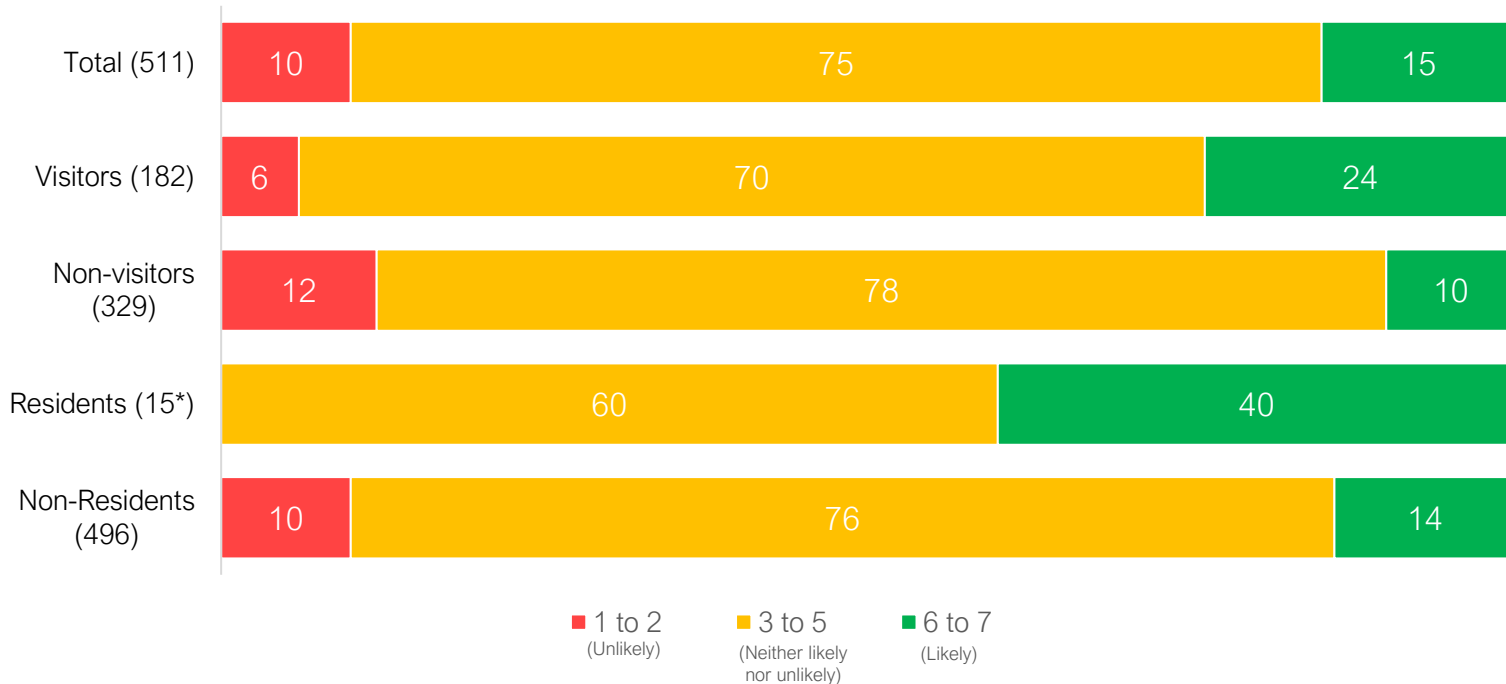
Those **planning to visit** are likely to be aged 35-44 (33%), with children aged 5-18 years old (63%) – earning over £50K a year (40%).

People who are **not planning a visit** are more likely to be Empty Nesters (31% planning a visit) and those earning less than £20K a year (just 20% planning a visit).



Of those not already planning a trip in the next 12 months, only 1 in 10 say they are likely to do so in the future. Most are uncertain rather than outright rejecters.

Likelihood to visit in future...



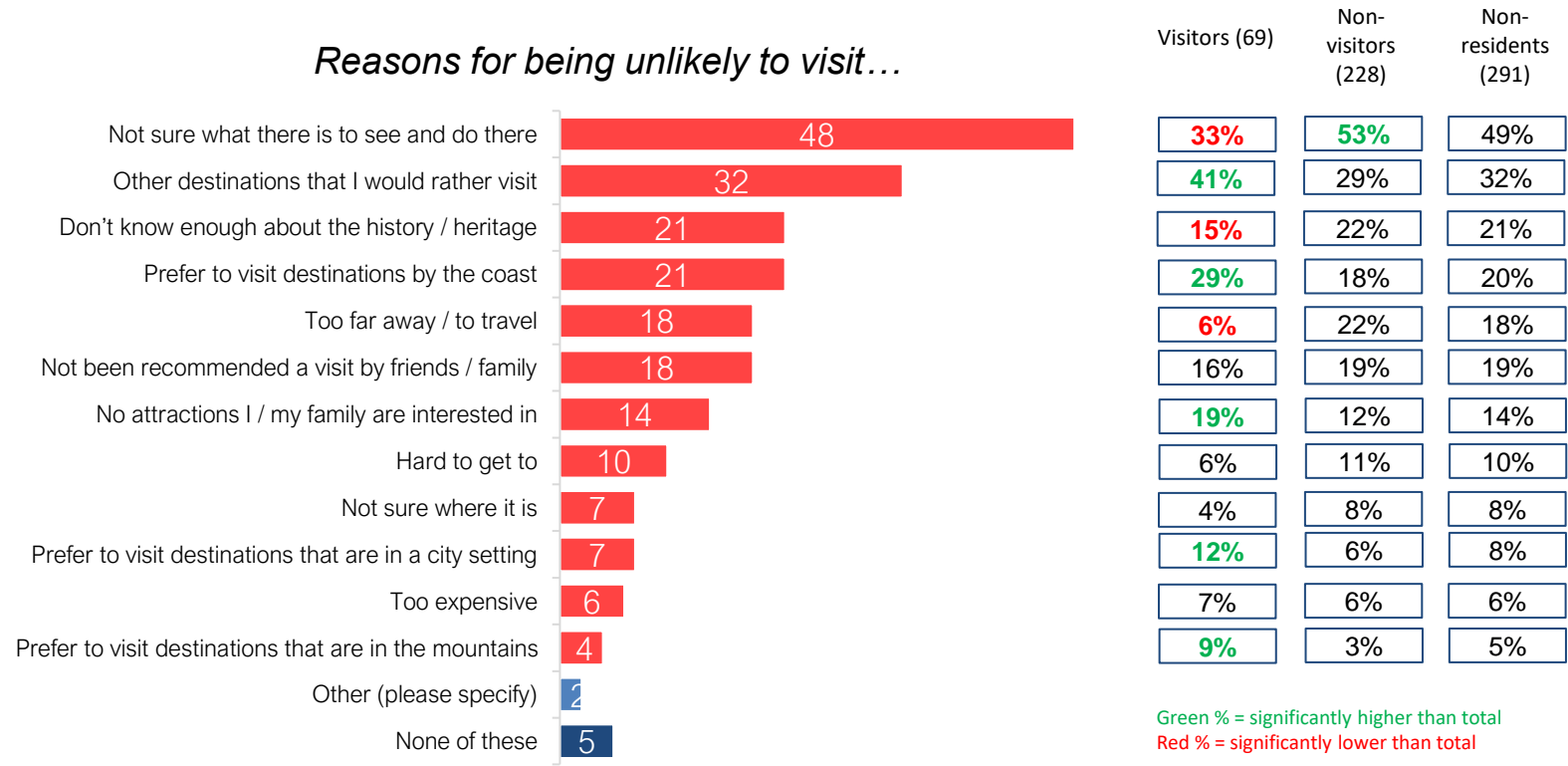
Base: In brackets – Those NOT planning to visit Hertfordshire

Q. please select how likely you would be to consider visiting Hertfordshire for a day out, short-break or leisure purposes in the future



Over half of non-visitors don't know what they can see and do in Hertfordshire, the main barrier to visiting. We can expect expense to become more of a barrier as the cost of living increases.

Reasons for being unlikely to visit...



Green % = significantly higher than total
 Red % = significantly lower than total

Base: 297 scoring 2 to 4 on likelihood scale

Q. What would you say are the main reasons for being relatively unlikely to consider visiting Hertfordshire for a day out, short-break or leisure purposes in the future?

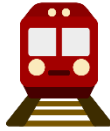


Car and train would be the preferred travel type, and people expect to visit with their family or partner. These findings are in line with recent visits.

Expect to travel by...
(multiple responses given)



79%
Car



35%
Train



11%
Bus / coach



3%
Taxi



2%
Motorbike



1%
Cycle

Expect to visit with...



40%
Family Unit



36%
With
partner



9%
Alone / by
self



6%
Group of
friends



3%
Extended
Family



3%
Another
family



1%
Intergenerational



Whereas older respondents are more likely to travel alone and by car, young visitors expect to visit in groups and use public transport.

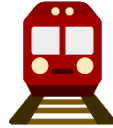
Key audience differences...



Those visiting by car...

Hertfordshire Residents
(91% vs. 79%)

Aged 75+
(91% vs. 79%)



Those visiting by train...

Young Couples / Pre-Family
(55% vs. 35%)

Visiting Alone / by self
(64% vs. 35%)

Visiting with friends
(61% vs. 35%)



Those visiting alone / by self...

Empty Nesters / Older Couples
(17% vs. 9%)

Aged 65-74
(20% vs. 9%)



Those visiting with partner...

Empty Nesters / Older Couples
(56% vs. 36%)

Younger Couples / Pre-Family
(46% vs. 35%)



Summer and Autumn are the most popular seasons for Hertfordshire visits – likely linked to the region’s strong association with the outdoors

Time of year considering to visit Hertfordshire...



32%

Spring

(March / April / May)



68%

Summer

(June / July / August)



41%

Autumn

(September / October /
November)



17%

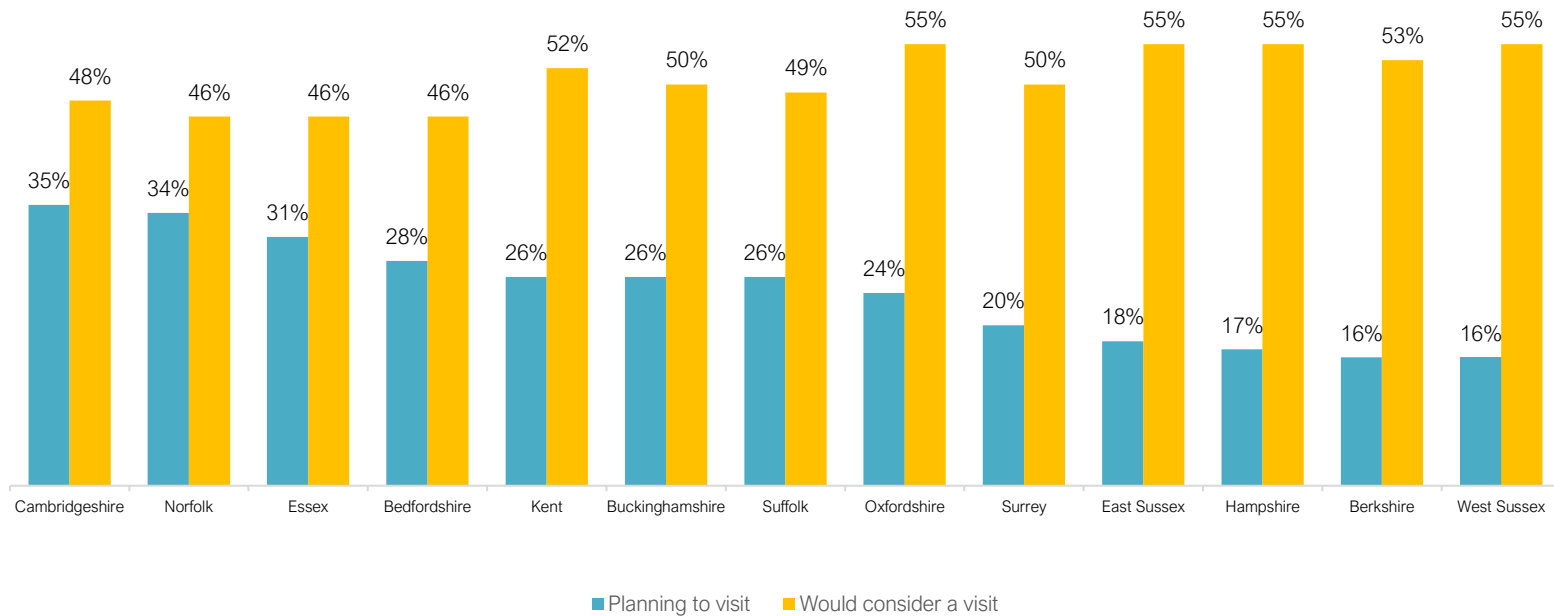
Winter

(December / January /
February)



Looking at planned visits to competitor regions, it's likely that Cambridgeshire, Norfolk and Essex will remain favourites over the next year.

Total Sample – Other destination future visits



Base: Total Sample (1000)

Q. Now thinking about future visits. For each of the following UK counties, please select the option that best applies to you.



Key Takeouts

- Families will continue to be a key demographic for visits – which is encouraging with many of the concept experiences in mind.
- However, it looks likely that future visits will still be fuelled by local Residents and repeat visitors. There's a clear opportunity to better promote the new and existing range of events, attractions and experiences available in the area – and create the image of a region that has lots to see and do, for all the family. Screen tourism could be key to building this image and differentiating over other destinations and destination types!
- Within this, the 'countryside' image of Hertfordshire means people are much more likely to consider a summer visit – people could be further encouraged to visit all year round.
- With car travel so high, it's important to include messaging around a short drive-time. However, younger audiences and groups of friends can be encouraged to use public transport instead. Messaging around a car-free break could also be influential here.

Hertfordshire Perceptions





Hertfordshire itself is associated with many of the important destination attributes – in particular a beautiful, green and historic region. However, this can also mean it is lacking in terms of a distinct USP.

Words to describe Hertfordshire (spontaneous)

Green = 226 mentions

Beauty = 100 mentions



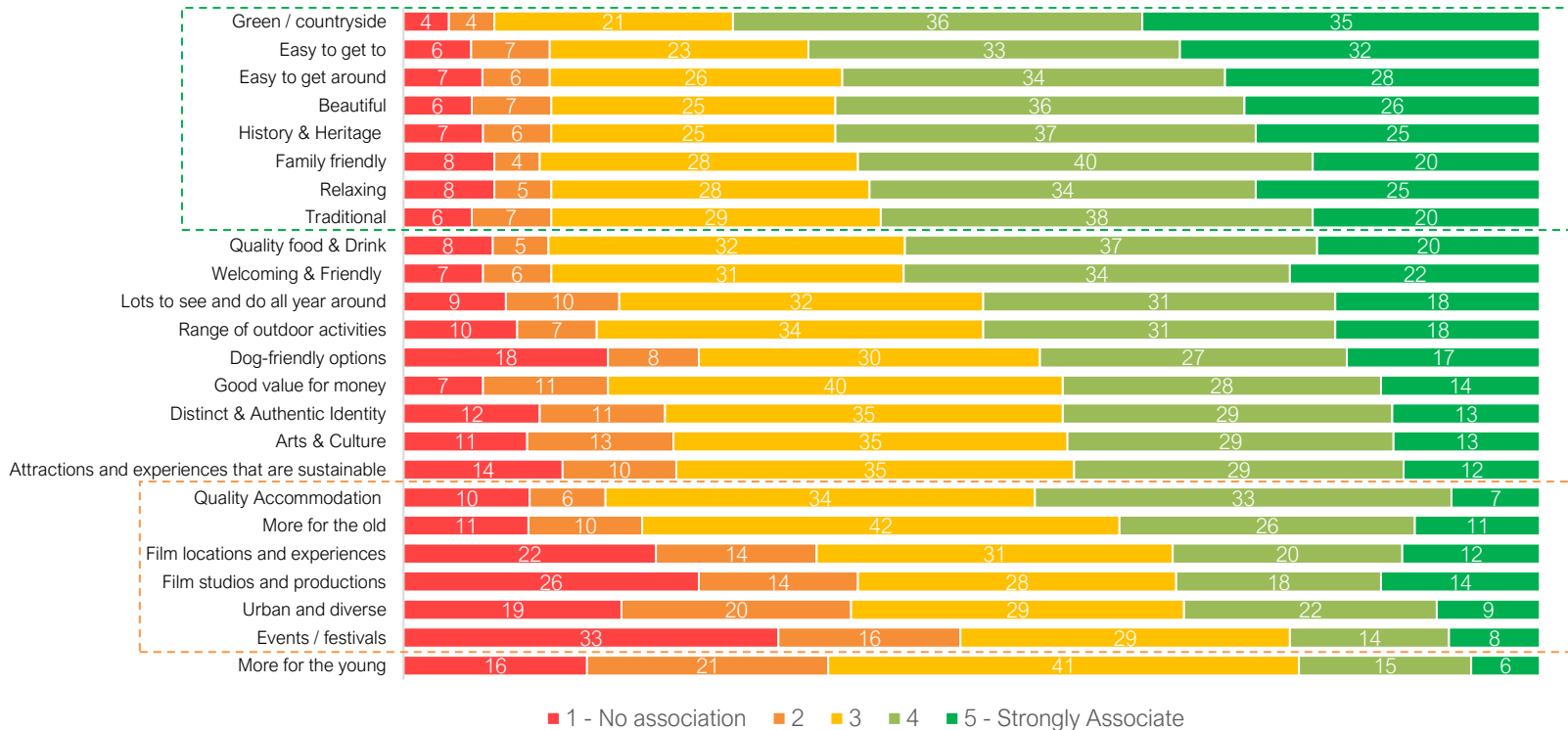
Historic = 105 mentions

Countryside = 88 mentions



Hertfordshire is mostly associated with being a traditional, relaxing countryside location that is also accessible. More needs to be done to raise awareness of the quality accommodation and events / experiences that do exist in the area.

Total sample – Hertfordshire associations...



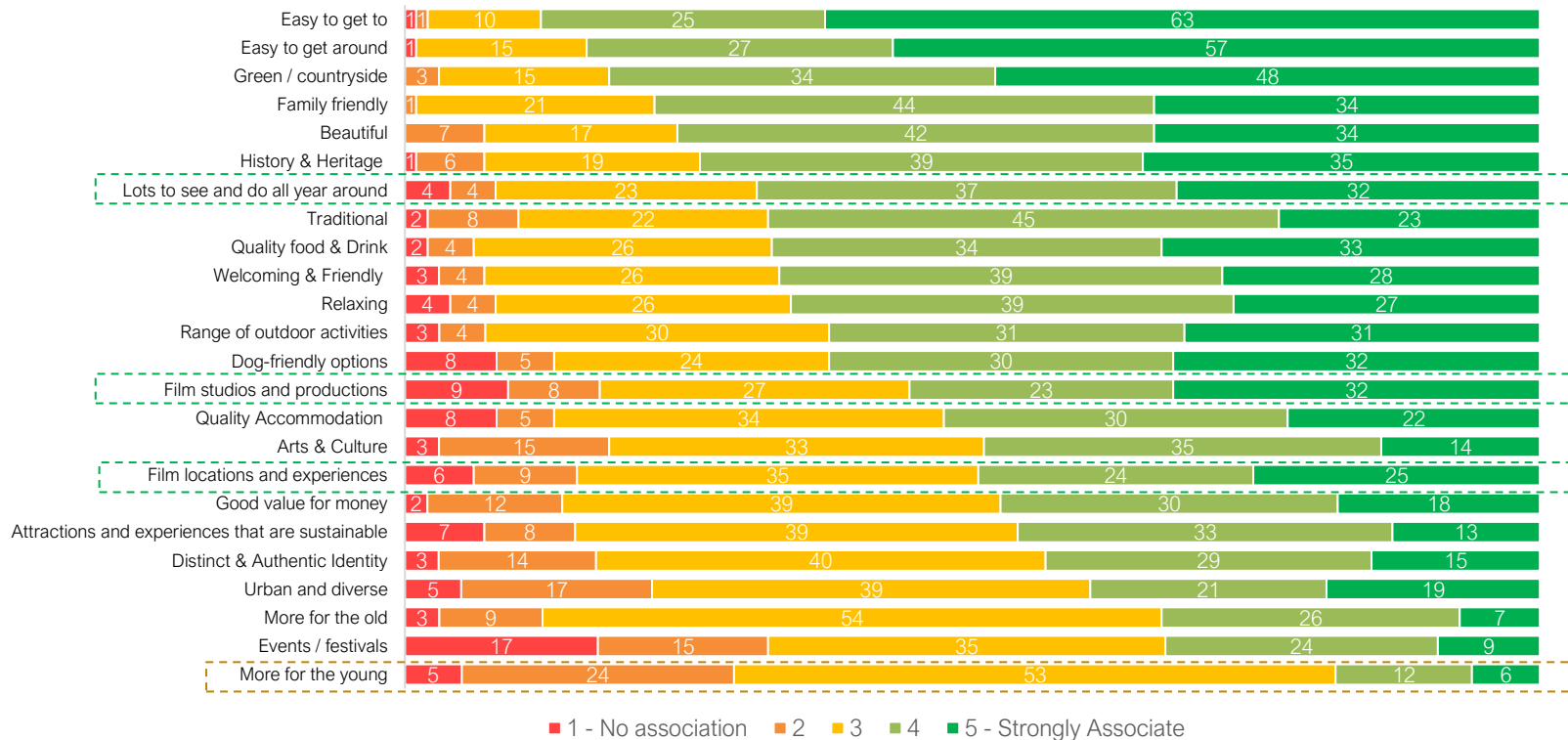
Base: Total sample (1000)

Q. Out of the following, which do you associate with Hertfordshire? Please score each from 'Strongly associate' to 'No association at all'.



Residents are more likely to say there is lots to see and do, and notice the Film & TV connections. However, they do not see it as a place for young people.

Residents – Hertfordshire associations...



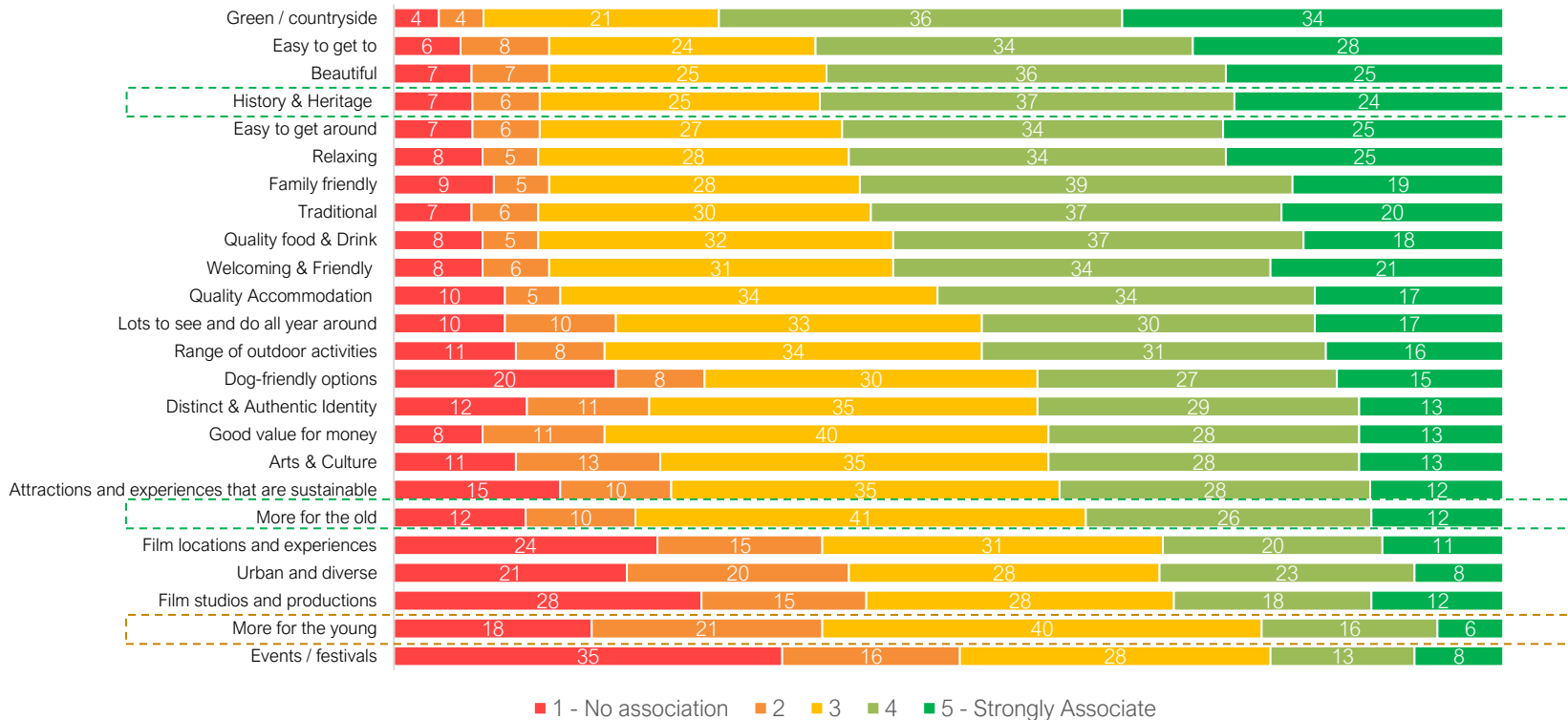
Base: Hertfordshire Residents (96)

Q. Out of the following, which do you associate with Hertfordshire? Please score each from 'Strongly associate' to 'No association at all'.



Whereas non-residents are more likely to associate Hertfordshire as a place 'more for the old', with history & heritage high up the list of associations too.

Non-residents – Hertfordshire associations...



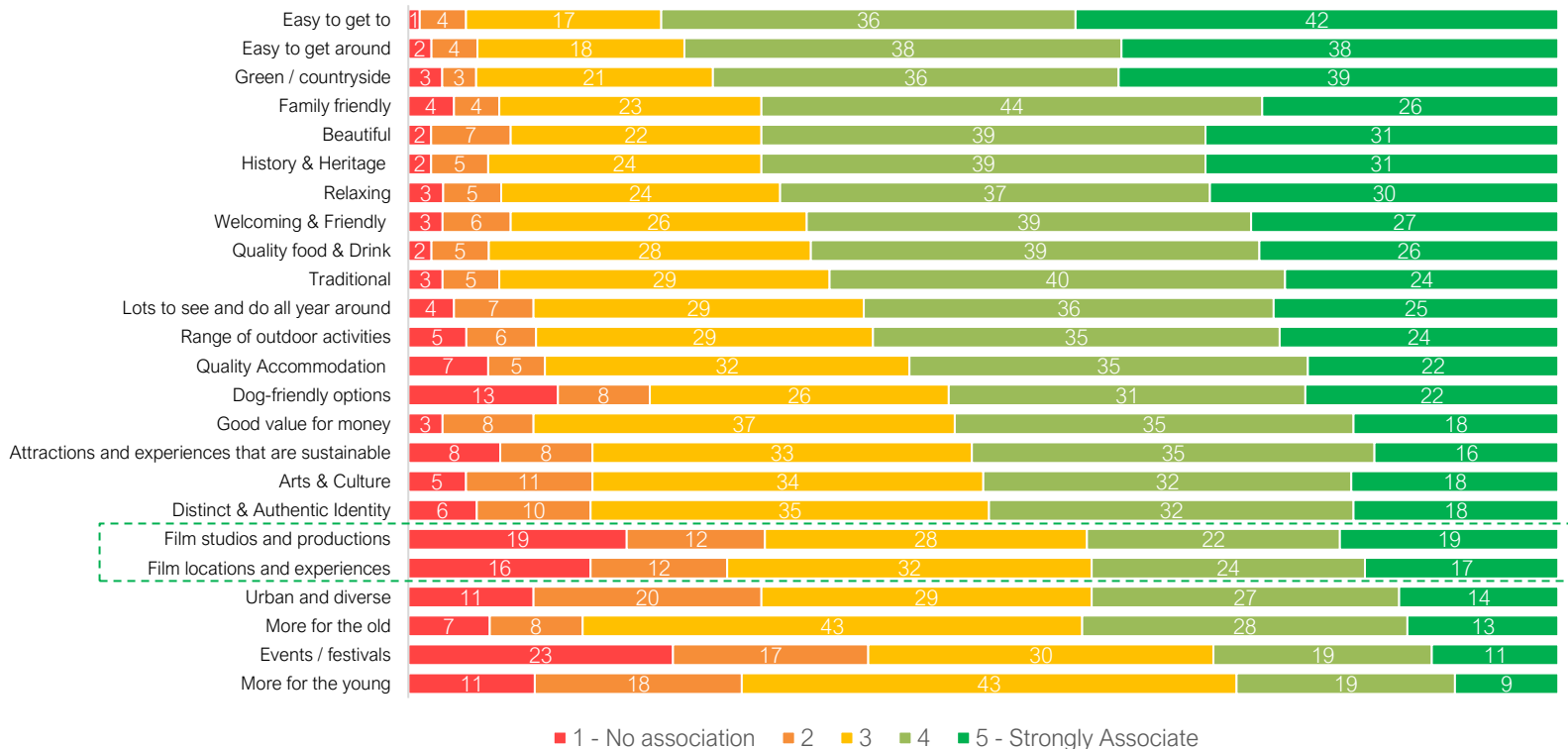
Base: Non-Herts Residents (904)

Q. Out of the following, which do you associate with Hertfordshire? Please score each from 'Strongly associate' to 'No association at all'.



Previous visitors also note the beauty of a countryside location. However, importantly, they are more likely to associate Hertfordshire with Film studios (41% vs. 32% overall) and Film experiences (41% vs. 32% overall)

Visitors – Hertfordshire associations...



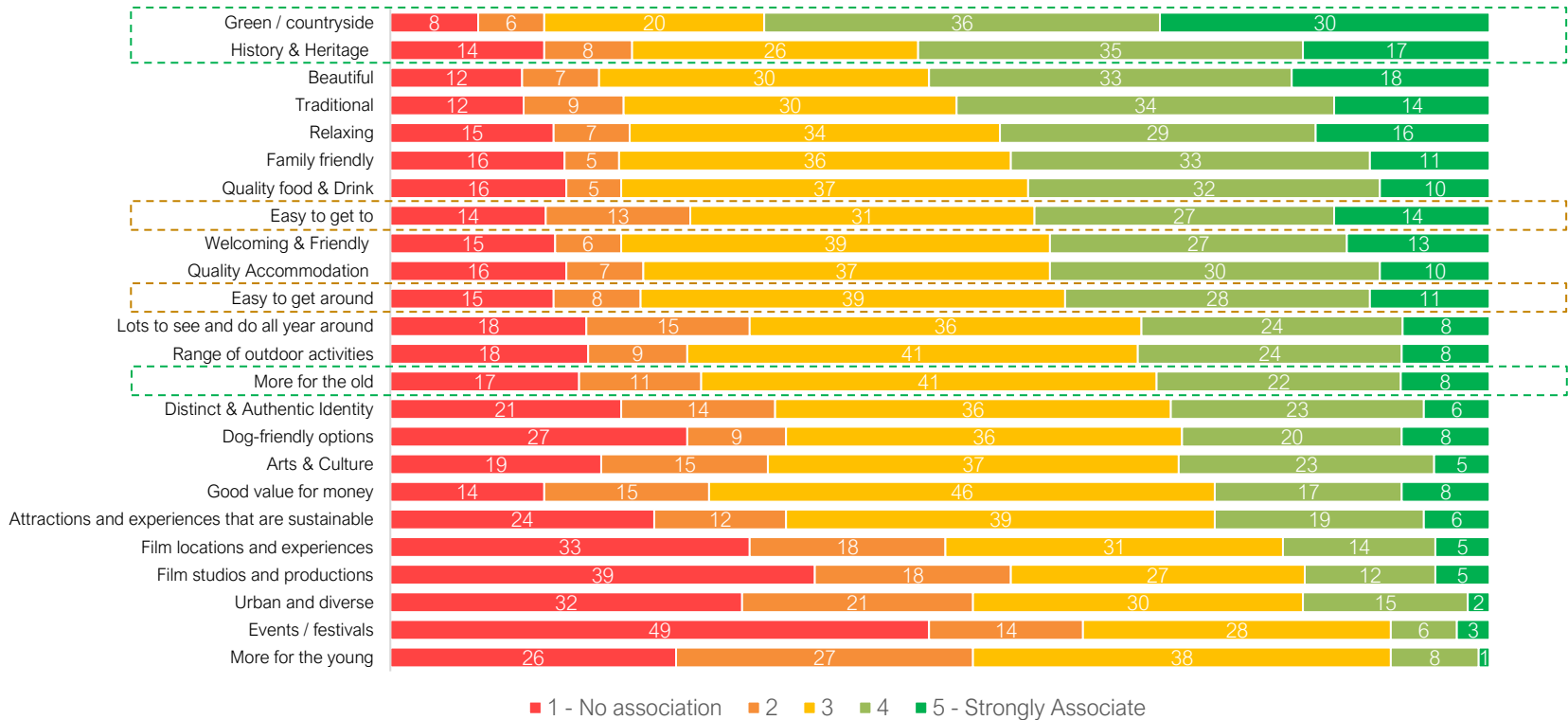
Base: Recent Visitors (618)

Q. Out of the following, which do you associate with Hertfordshire? Please score each from 'Strongly associate' to 'No association at all'.



Accessibility is further down the list for non-visitors. The historic countryside image is stronger, likely to see it more as a place for older visitors than younger.

Non-Visitors – Hertfordshire associations...



Base: Non-Visitors (382)

Q. Out of the following, which do you associate with Hertfordshire? Please score each from 'Strongly associate' to 'No association at all'.



Key Takeouts (1)

- There is limited knowledge of what there is to see and do in Hertfordshire. There is a need to increase the awareness of attractions and experiences – particularly amongst non-visitors.
- More of a USP and distinct identity needs to be promoted. A relaxing, countryside image is common in the UK – what else gives people reason to visit Hertfordshire? Part of this work will be promoting all there is to see and do in the area, including all the film experience and wider events that already exist and catering for people of all ages.
- There is a perception amongst most audiences, most notably non-visitors, that Hertfordshire is not a place for the young. In order to attract a younger audience, more needs to be done to cater to younger demographics and alter this perception!



Key Takeouts (2)

- Film and TV locations are not currently top of mind for the region – but from previous research we do know appetite exists. Herts Residents and Previous Visitors show higher awareness of the connection, and should be used as promoters for screen tourism – which we know to be important for inspiration.
- With Previous Visitors becoming more aware of the Film & TV connection, this project should build Film & TV into the identity of the region and aim to create this association *prior* to arrival.
- Hertfordshire has very strong associations with history & heritage, as well as being a relaxing, green countryside location. These attributes should be utilised to encourage visitation among new audiences, but also incorporated into screen tourism experiences to better align with the region's image.



Key Takeouts (3)

- The importance of accessibility for day-trips or short-breaks is a reminder that attractions should be easy to get to and around – especially those that appeal to older demographics, or grandparents.
- At the same time, amenities are also important and can present opportunity for attractions to link with other experiences and venues such as hotels, restaurants and bars – encouraging fuller days out and longer stays. The quality offering for Food, Drink & Accommodation exists, and needs to be better promoted.

Hertfordshire: Screen Tourism





Hertfordshire has a relatively strong association with Film & TV – with around a third associating the area with Film studios, locations or experiences overall.

Hertfordshire associations...



14% Strongly Associate
Film studios and productions

32% associate Hertfordshire with Film Studios
and Productions to some degree
(4 or 5 on 5-point scale)



12% Strongly Associate
Film locations and experiences

32% associate Hertfordshire with Film Locations and
Experiences to some degree
(4 or 5 on 5-point scale)

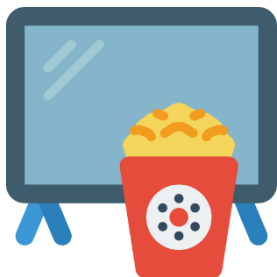
Residents are much more likely to associate Hertfordshire with Film Studios and Productions (32% Strongly / 55% to some degree) and Locations and Experiences (25% Strongly / 49% to some degree).

Association amongst Non-Residents is in line with overall figures.



Compared to practical travel elements, Film & TV experiences are not top of the list for trips in England. However, appeal does already exist and should be seen as an opportunity to address perceptions around a lack of identity, or lack of things to see and do.

Important for day trips or short-breaks...



11%

Attractions and experiences related to film & TV

35-44 age group (14%)

Likely to visit Herts with partner (14%)

Visited Warner Bros. Studio Tour – The Making of Harry Potter (20%)



8%

Locations I've seen in film or TV shows

Likely to visit Herts alone (11%)



Association with Film & TV means those who plan to visit are more likely to see it as an influence in their decision. Families and couples are also more influenced by the association with Film locations and studios.

Influenced decision to visit Hertfordshire...



7%

Film Studios and Productions

25-34 age group
(11%)

Very familiar with Herts
(14%)

Visited Warner Bros. Studio Tour –
The Making of Harry Potter
(13%)



7%

Film Locations and Experiences

Early Family; children 0-4 (12%)

Secondary school kids in HH (13%)

Visited with another couple* (21%)

Would influence decision to visit Hertfordshire...



4%

Film Studios and Productions

Older Family; kids 12-18
(9%)

Visit planned in next 12M
(11%)

Visited Warner Bros. Studio Tour –
The Making of Harry Potter
(13%)



8%

Film Locations and Experiences

Visit planned in next 12M
(15%)

Likely to visit with friend group
(13%)

Visited Warner Bros. Studio Tour –
The Making of Harry Potter
(13%)





Interestingly, all attractions have been visited by some who classified as Non-Visitors to Herts – suggesting low awareness of them located within the region.

Attraction visitation amongst Herts Non-Visitors...



St Albans Cathedral
11% Visited



**Warner Bros. Studio Tour –
The Making of Harry Potter**
17% Visited



Hatfield House
9% Visited



Paradise Wildlife Park
8% Visited



Knebworth House
8% Visited



Lee Valley Regional Park
8% Visited



Snow Centre
4% Visited



Henry Moore Studios
3% Visited



For day trips or short-breaks, more importance is instead placed on historical, immersive or sustainable attractions. Tying these preferred attributes with the film product could also increase appeal.

Important for day trips or short-breaks...



38%

Historical Attractions



32%

Attractions relating to the environment



20%

Art, literature and culture attractions



19%

Immersive or exclusive activities / experiences



16%

Sustainable attractions / destinations



Outdoor and heritage attractions have more general appeal within Hertfordshire. Film experiences will have a much more niche audience – with Warner Bros. Studio Tour – The Making of Harry Potter the exception.

Existing Hertfordshire Attractions...



St Albans Cathedral
32% visited / 61% intend to



**Warner Bros. Studio Tour –
The Making of Harry Potter**
29% visited / 64% intend to



Hatfield House
28% visited / 63% intend to



Paradise Wildlife Park
28% visited / 76% intend to



Knebworth House
26% visited / 62% intend to



Lee Valley Regional Park
25% visited / 67% intend to



Snow Centre
12% visited / 59% intend to



Henry Moore Studios
10% visited / 58% intend to



Key Takeouts

- Although association with Film experiences is not currently that high, and it isn't a **primary** reason to visit, there is a relatively strong base level from which the project can build upon to increase the county's identity as a film destination and make it a primary reason to visit.
- Links with being a Historic, Green and Relaxing destination provide great opportunity for so many of our experience concepts to associate themselves with these attributes – forest walks, historic buildings and a relaxing environment would bring the experiences closer to Hertfordshire's identity.
- In particular, there is opportunity to target young families or couples with screen tourism products as they show higher interest. This could be promoted alongside more established film tourism attractions like Warner Bros. Studio Tour – The Making of Harry Potter or filming locations such as Hatfield House and Knebworth House.

Herts, Camera
Action: Experience
Concepts





Concept Testing - Methodology

Our 10 concepts were tested as part of the same online panel survey for the Hertfordshire Tourism stats.

With 10 concepts to test in total, respondents were shown 5 in each, in a randomised order to reduce fatigue and ensure a 'fair test' for all.

Due to this, each concept was seen by around 430-500 respondents in total.



Key stats – overall view

CONCEPT	Level of appeal (Top 2 box)	Likelihood to visit (Top 2 box)	Understanding (% completely)	Expected Cost	Expected Duration
1	27%	24%	42%	£24.30	3-3.5hrs
2	20%	19%	46%	£16.20	2.5hrs
3	24%	21%	42%	£17.00	2.75-3hrs
4	24%	22%	57%	£18.20	2-2.25hrs
5	21%	15%	56%	£22.00	2.5hrs
6	20%	17%	57%	£25.30	2.5hrs
7	16%	15%	58%	£18.00	2hrs
8	29%	25%	64%	£21.00	2.5-3hrs
9	17%	15%	65%	£22.00	2.5hrs
10	24%	20%	66%	£25.00	2.5hrs



Experience Concepts – Overarching Themes (1)

- Name dropping specific TV shows or Films helps boost the appeal of concepts – those specifically mentioning The Crown, Harry Potter or Paddington receive much more positivity. It gives people something to attach to the experience!
- Those that appeal to younger families are also likely to appeal to older people – likely grandparents. They should be positioned as a potential day out for the whole family, and an opportunity for older relatives to spend time with children.
- Don't always limit experiences to young families and children – some (e.g., the animation studios) may appeal to older people who have an interest in these areas too. Putting an age limit on it would be a barrier to them visiting!



Experience Concepts – Overarching Themes (2)

- As suggested previously, experiences that combine the outdoors with Film & TV perform very well. For those who are already into the outdoors or walking, the additional layer of film locations is a unique twist.
- Those that are too niche are less appealing – losing the interest of those who do not know much about the topic. Instead, those that focus on specialist areas like Photography (concept 9) or Foundlings (concept 7) should target a more specialist niche audience
- Easy to get to, and easy to get around remains important – one of the main areas people would like to know more about
- None of the concepts are expected to take up too much of the day – around 2-3 hours maximum. Thought needs to be given to what could make them feel like more of a full day-trip – e.g., links to food & drink venues or hotels



Concept 1 – Are you ready to walk in the footsteps of the famous, on the most regal of film & TV tours?

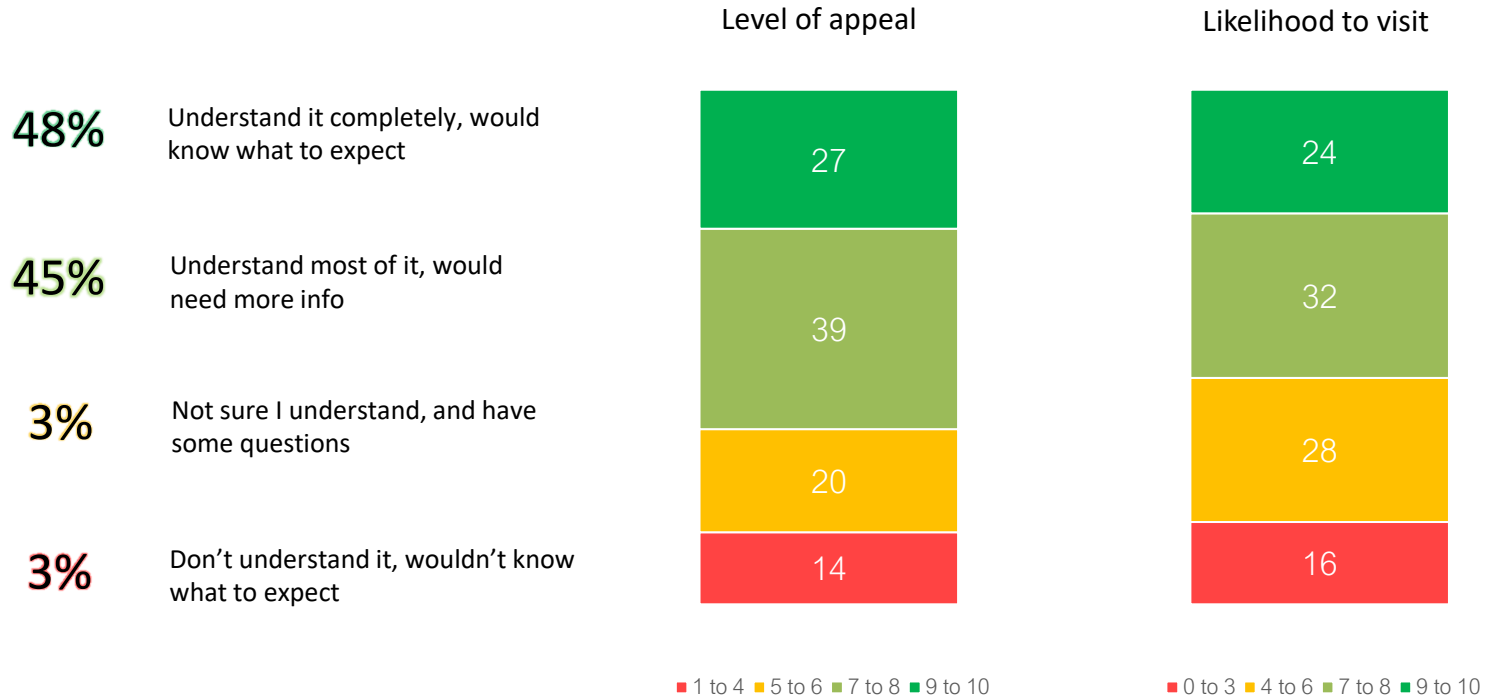


Are you ready to walk in the footsteps of the famous on the most regal of film & TV tours?

Hertfordshire is known for stunning historic houses, and hidden gems that might be more familiar than you think... Time and time again they create the perfect backdrop to some of the UK's biggest blockbuster films and TV series. Visit locations used in Harry Potter, The Crown and Wonder Woman to Star Wars, combining locations, private homes, and great experiences. This Jubilee year, immerse yourself in everything Royal on The Crown Tour; visit the locations, become an expert in the dos and don'ts of afternoon tea and stroll in the private gardens of the Queen Mother's childhood home



Around a quarter find the concept appealing, and would be likely to visit. Almost half feel like they would need more information.





This attraction is likely to be one that people visit with their partner. They would consider it as part of a wider day out, so would expect it to last 3 hours.

Expected cost & time

£ 24.30

3-3.5hrs

Visit type



37%
This attraction specifically

Versus average of 33%



42%
Part of wider day out / trip

Versus average of 33%

Would visit with...



47% Family Unit



42% Partner ↑



20% Group of Friends



13% Extended Family



4% Intergenerational Family



3% Specialist Group



= relatively higher / lower



In terms of what else people would like to know, it's all about the specifics – where exactly is it, how long does it last and what type of tour is it?

Need to know more about...



Locations / venues – map showing distance between each / how to travel

“Telling me about where the locations are, and how many different locations there are. How do you travel between the locations?”
Non-resident, 35-44, Younger Couple



Timetable – how long for each film, and how long it lasts

“I would need a more detailed timetable of the experience”
Non-resident, 65-74, Older Couple / Empty Nester



Type of tour – is it with a tour guide, digital or audio?

“How the tour operates, is it self-guided from instructions or a guided / arranged tour?”
Resident, 75+, Older Couple / Empty Nester



The concept has high appeal as it feels unique and different seeing these places in real life. Mentions of Harry Potter and The Crown are also very important.

Reasons likely to visit
(8-10 score)

Unique / different seeing in real life

Interested in history / historical places

Big fans of The Crown / Harry Potter

Something for the kids / whole family

“Hertfordshire is so closely linked to film and tv and British royal culture, it would feel so immersive and a unique experience.”
Non-resident, 25-34, Younger Family

“I don’t like organised tours. I’d rather walk around myself at my own pace.”
Non-resident, 25-34, Younger Family

Reasons less likely to visit
(0-4 score)

Not for me / not a film or TV fan

Prefer to visit locations in own time

Local resident – know / visited already

Unable to travel around due to health

What would they change?



Addition of food / drink vendors

“Include other activities that include food and drink popular to the theme or region.”
Non-resident, 35-44, Younger Couples / Pre-Family



Host a film screening on the grounds

“Have a screen outside on the grass to watch the films.”
Non-resident, 45-54, Early Family



Child specific areas / activities

“The only thing that I could think to improve is by providing some activities for children... you could have dress-up areas for children to dress like royalty, whilst they walk round the gardens.”
Non-resident, 25-34, Younger Couples / Pre-Family



Focus on TV & Film / Remove royal side

“I have no interest in the Queen or any of the royal family so changing the focus to the attraction's feature in wider film and TV would be more of a selling point for me.”
Non-resident, 18-24, Younger Couples / Pre-Family



Who finds it appealing?



This concept appeals primarily to young families, aged 25-34, with children of a primary school age (5-11) living in the household. They're likely to have visited Warner Bros. Studio Tour – The Making of Harry Potter, and be into history or romance genres.

Appeal is also strong amongst those likely to visit Hertfordshire with their partner.

OVERALL TOP 2 BOX APPEAL = 27%

Interest amongst...

Lifestage: Younger family (36%)

Age: 25-34 (32%)

Children in HH: Primary school age 5-11 (39%)

Would visit Herts with: Family Unit (33%)

Would visit Herts with: Partner (27%)

Previously visited: Warner Bros. Studio Tour – The Making of Harry Potter (36%)

Previously visited: St Albans Cathedral (33%)

TV / Film Genres Liked: Romance (43%)

TV / Film Genres Liked: Historical (42%)





Concept 2 – A Marvellous Menagerie of Mythical Beasts



A Marvellous Menagerie of Mythical Beasts

Immerse your little ones into a captivating world of mythical creatures with marvellous magic for the whole family! Design your own mythical beast, meet the wise Unicorn, learn secrets about the creatures of Hertfordshire and step up to the challenge of Dragon Training!



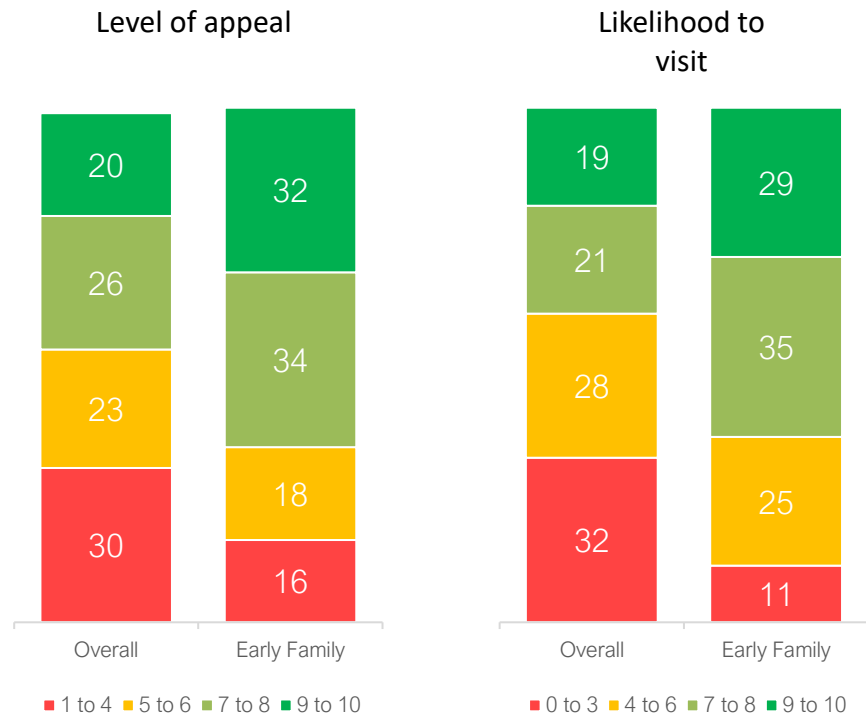
Appeal and likelihood to visit are relatively low for this concept experience. However, both rise significantly for the target audience of Early Families.

42% Understand it completely, would know what to expect

41% Understand most of it, would need more info

8% Not sure I understand, and have some questions

9% Don't understand it, wouldn't know what to expect



Base: 434 who were shown Concept 2
Q. Which of the following best describes your understanding of the experience concept?



Family appeal is high, but there is a relatively low expected cost for this concept experience. More hands-on and active experiences would likely increase the cost

Expected cost & time



16.20



2.5hrs

Visit type



33%

This attraction specifically

Versus average of 33%



34%

Part of wider day out / trip

Versus average of 33%

Would visit with...



54% Family Unit



29% Partner



18% Extended Family



15% Group of Friends



5% Intergenerational Family



1% Specialist Group



= relatively higher / lower



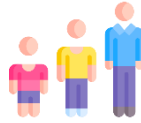
The concept description can be brought to life more through visuals and an idea of what 'beasts' are there. Info on age groups helps families make a decision.

Need to know more about...



More info – what beasts? What will you actually be doing?

“Wouldn't be sure what types of mythical beasts would be there.”
Non-resident, 75+, Older Couples / Empty-Nesters



Age groups – Who is it for? Could older children enjoy it too?

“I would like to know age appropriateness. Would older kids enjoy this too?”
Non-resident, 55-64, Older Couples / Empty Nesters



More visuals – videos needed to help bring it to life / be more visual

“More photos and videos of the experience to actually see it.”
Non-Resident, 18-24, Younger Couples / Pre-Family



It is noted that this concept experience appeals highly to the intended audience of younger children and their parents - immersion and interaction aids this.

Reasons likely to visit
(8-10 score)

Suited for adults as well as children

Good place to take grandchildren

Feels immersive / good for imaginations

Sounds hands on / lots of involvement

"It sounds like a really cool hands on experience which may take up most of the day."
Non-resident, 18-24, Younger Couples / Pre-Family

"The picture doesn't show variety of mythical creatures that my kids can see. Not very attractive."
Non-resident, 35-44, Early Family

Reasons less likely to visit
(0-4 score)

Not for my age group

Health reasons – can't walk around

For younger children only – not teens

Concept doesn't bring activity to life



What would they change?



Make more adult friendly

“Activities that cater to a wider demographic, fun for both children and adults.”

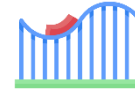
Non-resident, 25-34, Younger Couples / Pre-Family



Wider / more active experiences

“Maybe a wider range of attractions fitting the theme. There could be a maze for example.”

Non-resident, 18-24, Younger Couples / Pre-Family



The addition of rides linked to theme

“Its good but maybe it would need more immersive experiences or rides mixed in.”

Non-resident, 25-34, Early Family

Who finds it appealing?



Due to the nature of this concept, appeal is strongly targeted at early families with primary school age children. They are interested in romance and fantasy – and likely to be visiting places like Paradise Wildlife Park.

It appeals popular with those who have planned a Herts visit – matching the target audience.

OVERALL TOP 2 BOX APPEAL = 20%

Interest amongst...

Lifestage: Early Family (33%)

Age: 25-34 (28%)

Children in HH: Primary school age 5-11 (28%)

Would visit Herts with: Family Unit (24%)

Future visit to Herts: Planned in N12M (34%)

Previously visited: St Albans Cathedral (29%)

Previously visited: Paradise Wildlife Park (29%*)

TV / Film Genres Liked: Romance (29%)

TV / Film Genres Liked: Fantasy (28%)





Concept 3 – Venture into the enchanted forest of Ashridge Estate on a film locations tour

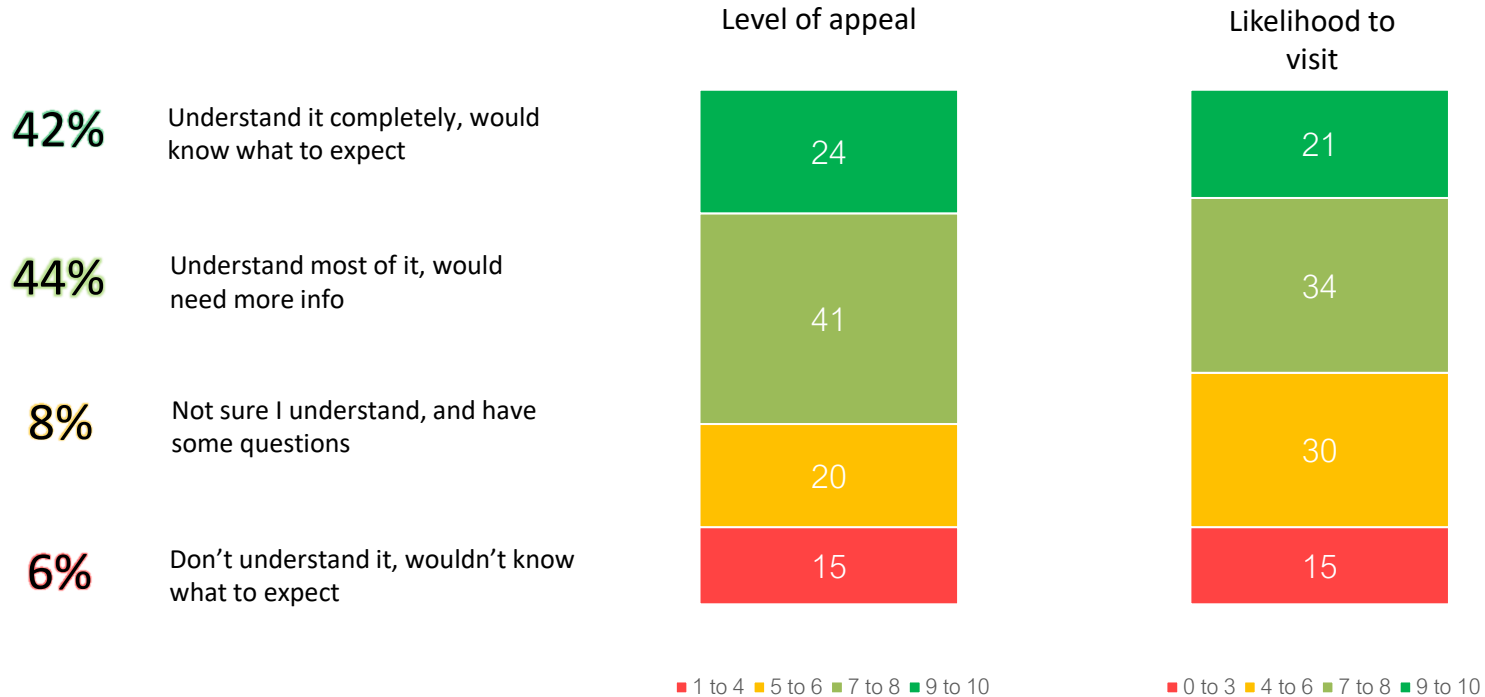


Venture into the enchanted forest of Ashridge Estate on a film locations tour.

Maleficent, Beauty and The Beast, Enola Holmes and of course, Harry Potter, Ashridge Estate has long served as the chosen charmed forest in many a fantastic flick. Take the walking tour and venture from the wizarding world to a land where brilliant beasts and super sleuths roam.



Though appeal is high for this concept, likelihood to visit does drop off a little – suggesting there could be key barriers to encouraging visits.





This is made further apparent by the fact it is more likely to be viewed as something people do 'as part of a wider trip', rather than visiting specifically.

Expected cost & time



17.00



2.5-
2.75hrs

Visit type



35%

This attraction specifically

Versus average of 33%



46%

Part of wider day out / trip

Versus average of 33%

Would visit with...



50% Family Unit



40% Partner



21% Group of Friends



16% Extended Family



6% Intergenerational Family



1% Specialist Group



= relatively higher / lower



The concept could be lacking in terms of 'activities' – what else is there to do other than walking around a forest?



Location details – Is it just a forest? How big is it?

“what is actually in the forest and how far exactly from attractions it actually is.”
Non-resident, 25-34, Younger Couples / Pre-Family

Need to know more about...



What else is there? – What are the activities? Café? Attractions?

“More information as to what is at the attraction, what ages it is aimed at and if there is any activities at the location to take part in.”
Resident, 25-34, Pre-Family



Specific film links – What part of the films? What makes it special?

“I would like have more information for exactly how many movies, which part of the movies we are talking about (the scenes).”
Non-resident, 35-44, Early Family



The combination of film and outdoors locations is thought to be clever – however, without further ‘activities’ this could just be seen as a simple walk in the forest.

Reasons likely to visit
(8-10 score)

Combination of film and outdoors

Interested in where movies / TV shows are filmed

Sounds like an ‘adventure’

Feels like a day out for the whole family

“I’m a fan of the films filmed on location, and I enjoy outdoor activities.”

Non-resident, 35-44, Younger Couples / Pre-Family

“I would prefer to have the option to visit a forest as an “add on” to visiting somewhere else, not the main reason for going somewhere.”

Non-resident, 45-54, Older Couple / Empty Nester

Reasons less likely to visit
(0-4 score)

Can’t walk far / doesn’t sound accessible

A walk in the forest is not enticing enough

Doesn’t sound like a full day / more of an add-on to visit

More for younger age groups

What would they change?



Food / picnic related to the theme

“Include a picnic or some kind of meal in the setting.”
Non-resident, 55-64, Older Couple / Empty Nester



Make sure it is accessible

“I would offer transport for those who can't walk on uneven ground.”
Non-resident, 25-34, Younger Couple / Pre-Family



Make more immersive – props / actors

“Maybe include props like wands from Harry Potter which would make it more immersive.”
Non-resident, 18-24, Younger Couples / Pre-Family



Night-time events / activities

“If not already available, it would be fun to do night tours.”
Non-resident, 35-44, Younger Couples / Pre-Family



Who finds it appealing?



There's a lot of interest from young couples aged 18-24, likely to be visiting Hertfordshire with their partner.

At the same time, it appears the fantasy or enchanted element of this concept reaches out to those interested in fantasy and horror – and could be played up more in the description.

OVERALL TOP 2 BOX APPEAL = 24%

Interest amongst...

Lifestage: Younger family (36%)

Lifestage: Younger Couples / Pre-Family (27%)

Age: 18-24 (33%), 35-44 (33%)

Future visits to Herts: Planned in N12M (35%)

Would visit Herts with: Partner (24%)

TV / Film Genres Liked: Romance (38%)

TV / Film Genres Liked: Horror (39%)

TV / Film Genres Liked: Fantasy (38%)





Concept 4 – Step behind the scenes on a Knebworth set-jetting tour.

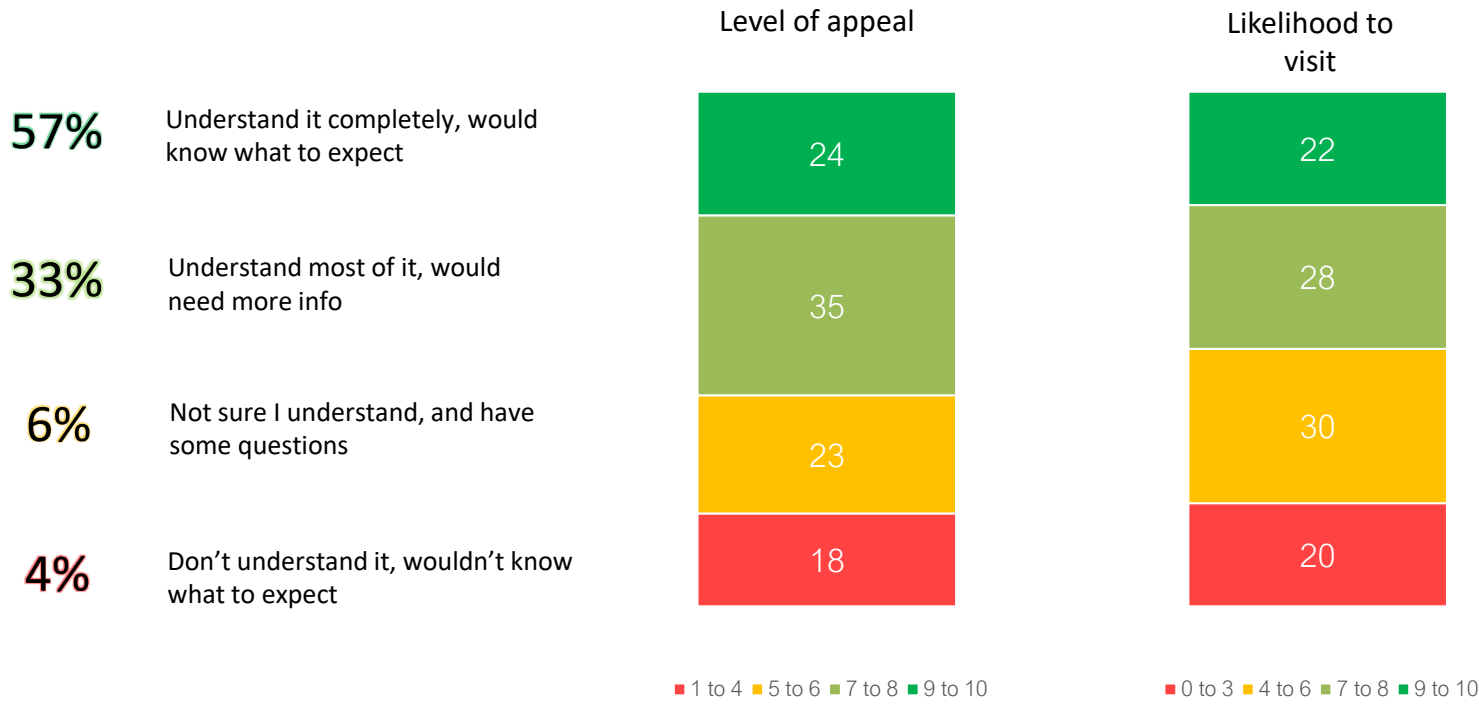


Step behind the scenes on a Knebworth set-jetting tour.

From the Kings Speech, to Batman, The Crown and Paddington 2, Knebworth has been gracing the big and small screen for decades. Step onto set with the 'On Location at Knebworth House' tour, see props and costumes at the new film exhibition and discover why Hollywood can't get enough of Knebworth's gothic facade and gorgeous grounds



The experience concept has good overall appeal, but this can be improved upon. It has large appeal amongst families with children of multiple ages.





With this in mind, the concept in fact has broad appeal for a range of audiences – from families to couples and groups of friends.

Expected cost & time

£ 18.20

🕒 2-2.25hrs

Visit type



36%
This attraction specifically

Versus average of 33%



38%
Part of wider day out / trip

Versus average of 33%

Would visit with...



48% Family Unit



40% Partner



19% Group of Friends



9% Extended Family



6% Intergenerational Family



3% Specialist Group



= relatively higher / lower

Base: 502 who were shown Concept 4

Q. How much would you expect something like this to cost per person / last? // If attending, would you be more likely to... // Who would you be likely to visit with?



The description would benefit from more basic information – what are the locations, and what actually happens during the tour?

Need to know more about...



Location – information about films associated with the location

“The history behind the location as a film favourite”
Non-resident, 18-24, Younger Couples / Pre-Family



Cost & Duration –how long it lasts, and how much does it cost

“I would like to know more of what I would get for the entrance cost and for how long”
Non-resident, 65-74, Older Couple / Empty Nester



Itinerary – what happens during the tour?

“More detailed information about what I would be doing and what happens during the day?”
Non-resident, 55-64, Older Couple / Empty Nester



Including film and TV titles does increase interest, with people wanting to see 'unique' things such as props. Offering more immersive or exclusive content would increase appeal.

Reasons likely to visit
(8-10 score)

Interesting / appealing

Learn about filmmaking / props / costumes

Big fans of The Crown / Batman / Paddington

Fun day out for all ages

"I am a fan of Batman and Paddington and so it will be wonderful to visit the set and see the props and tours."
Non-resident, 35-44, Younger Family

"I have seen lots of film-related tours and they are expensive for what you get. I would prefer more interaction or exclusive content."
Non-resident, 35-44, Younger Couples / Pre-Family

Reasons less likely to visit
(0-4 score)

Not for me / not a film or TV fan

Perceived to be expensive

Sounds plain & boring

Already visited Knebworth House



What would they change?



More immersive / real-life interaction

“Perhaps if there were interactive experiences? Walking around and looking at sets and props is only worthwhile to me when I have been really into the movie/show.”
Non-resident, 25-34, Early Family



Lookalikes / characters

“Something for the kids maybe someone dressed up as one of the characters.”
Non-resident, 35-44, Older Family



Food / drink offering

“It sounds pretty good as it is. Maybe throw in a free lunch or afternoon tea?”
Non-resident, 45-54, Early Family



Combine with other activity / add more

“Could be combined with another experience to make a fuller day out.”
Non-resident, 35-44, Younger Couples / Pre-Family

Who finds it appealing?



Parents in the 35-44 age group who have children in both primary and secondary school are likely to find this experience appealing. Possibly looking for something that pleases all age groups, it is the attraction that appeals most to those who have previously visited Paradise Wildlife Park.

It is also likely to appeal to those who would visit Hertfordshire with a group of friends.

OVERALL TOP 2 BOX APPEAL = 24%

Interest amongst...

Lifestage: Older Family (29%)

Age: 35-44 (37%)

Children in HH: Primary school age 5-11 (33%)

Children in HH: Family Unit (33%)

Would visit Herts with: Partner (27%)

Previously visited: Warner Bros. Studio Tour – The Making of Harry Potter (36%)

Previously visited: St Albans Cathedral (33%)

TV / Film Genres Liked: Romance (43%)

TV / Film Genres Liked: Historical (42%)





Concept 5 – The Hertfordshire on Screen Movie Makers Map

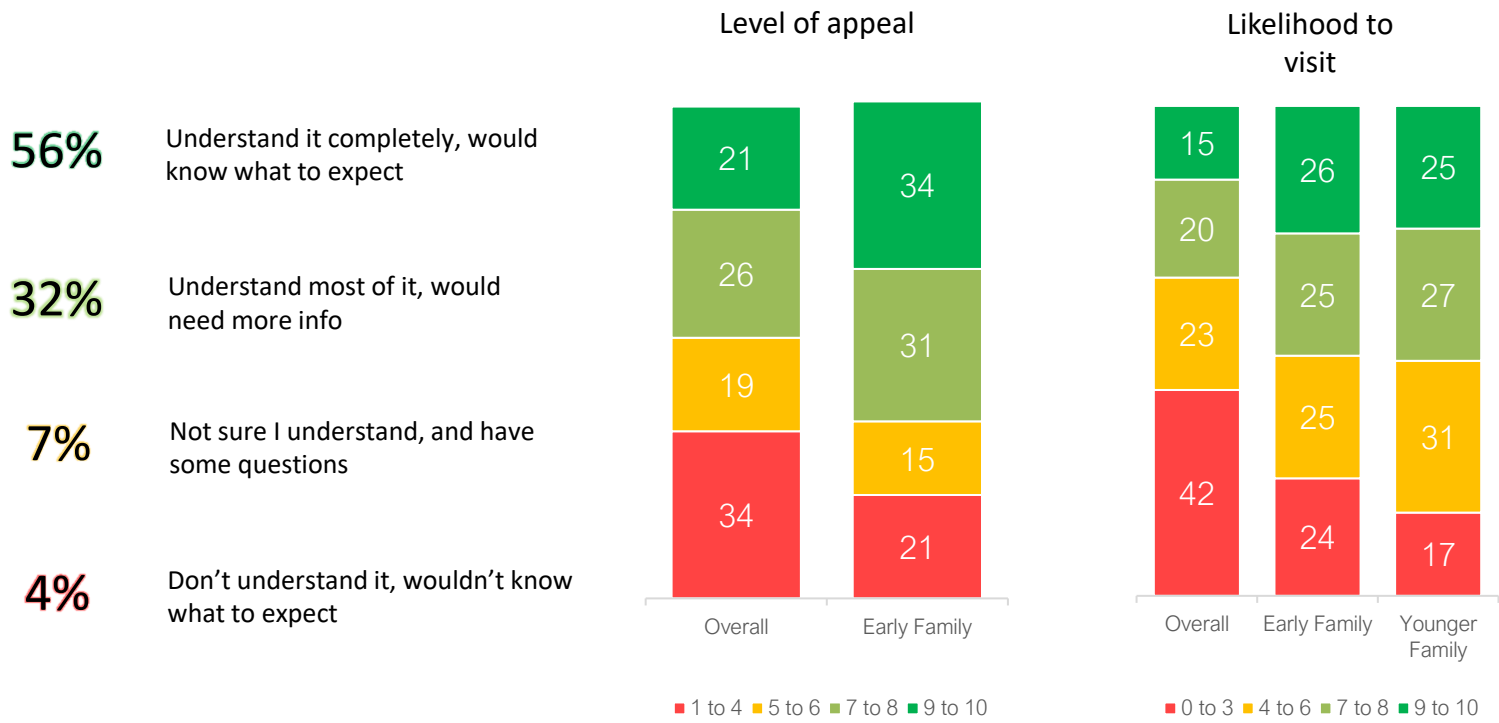


The Hertfordshire on Screen Movie Makers Map inspires children aged 7 to 16 to shoot their own short films using locations across Hertfordshire as their backdrop.

The map features an incredible array of historic, colourful, inspiring Hertfordshire attractions and locations that have appeared on the big screen, with short scouting reports inspiring families to visit. There are also quick links to a series of short videos from experts showing little ones how to shoot their own mini movies using mum or dad's mobile phone as their video camera. The Hertfordshire on Screen Movie Makers Map encourages families to get out and about and explore brilliant local attractions in a totally new way.



Overall appeal is impacted by the target audience of Early and Younger Families, who show considerably more interest in this concept experience.



Base: 496 who were shown Concept 5

Q. Which of the following best describes your understanding of the experience concept?



Unsurprisingly, this is an attraction people would primarily visit with their family. It is not that likely, however, to be one visit specifically.

Expected cost & time

£ 22.00

2.5hrs

Visit type



29%
This attraction specifically

Versus average of 33%




30%
Part of wider day out / trip

Versus average of 33%

Would visit with...



57% Family Unit 




21% Partner 



12% Extended Family



12% Group of Friends 



5% Intergenerational Family



2% Specialist Group



= relatively higher / lower



A lot more needs to be given in terms of the accessibility of sites and multiple locations on the map – will people have to travel far? Is it accessible for elder relatives?

Need to know more about...



Locations – distance between different locations / how to travel

“I would like to know where these locations are and how far from each other they are, i.e. Would we have to drive to each stop or can we walk?”
Non-resident, 25-34, Early Family



Itinerary – information about the event's progression through the day

“I don't understand what it would involve”
Non-resident, 25-34, Early Family



Accessibility – is it suitable for adults and people with different needs

“Is it only for younger or is there anything for older children? Is there a cafe or restaurant? Is it accessible for people with difficulties?”
Non-resident, 45-54, Older Family



The activity of making a movie feels very interactive for children. However, it needs to be marketed correctly to avoid being perceived as too tedious / boring for older children or parents.

Reasons likely to visit
(8-10 score)

Rich experience for children

Interested in historical places

Like making movies

Something for the whole family

“I think it sounds like a fantastic idea especially to get kids thinking outside the box with storylines.”

Non-resident, 35-44, Early Family

“for children. I need more information about which films the locations refer to, to decide if it's something children would be interested in and the activity needs more specific direction and feedback.”

Non-resident, 35-44, Younger Couples / Pre-Family

Reasons less likely to visit
(0-4 score)

Children activity / not suitable for adults

Do not have young children

Sounds confusing / need more information

Tedious & boring

What would they change?



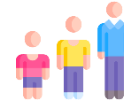
What prep / equipment is required

“Some kind of pencil/paper kit for the children to encourage planning something out before shooting?”
Non-resident, 35-44, Younger Family



Good equipment available

“have more advanced cameras and equipment so the kids get a real insight to the filming world.”
Resident, 55-64, Older Family



Broaden children age range

“Maybe also allow children up to 18 years to be able to partake”
Non-resident, 35-44, Older Family



Make it adult-friendly too

“Make it also suitable for those without young children, maybe like Footsteps London, where you follow a trail on your phone or by printing out a leaflet to encourage more walking in your own area.”
Resident, 65-74, Older Couple / Empty Nester



Who finds it appealing?



As an experience directly aimed at a broad age range for children, this is likely to be one for families with kids of multiple ages – appealing to parents of pre-school, primary school AND secondary school age kids.

It could well be an activity for multiple family units, with appeal strong for those who would visit Hertfordshire along with other families.

OVERALL TOP 2 BOX APPEAL = 21%

Interest amongst...

Lifestage: Early family (34%)

Age: 25-34 (28%)

Children in HH: Pre-school age (3-5 years) (35%)

Would visit Herts with: Family Unit (32%)

Would visit Herts with: Another family unit (25%)

Previously visited: St. Albans Cathedral (27%)

Time of year: Summer (June / July / August) (24%)

TV / Film Genres Liked: Science Fiction / Fantasy (28%)





Concept 6 – Learn the secrets of animation at one of the UK's biggest studios

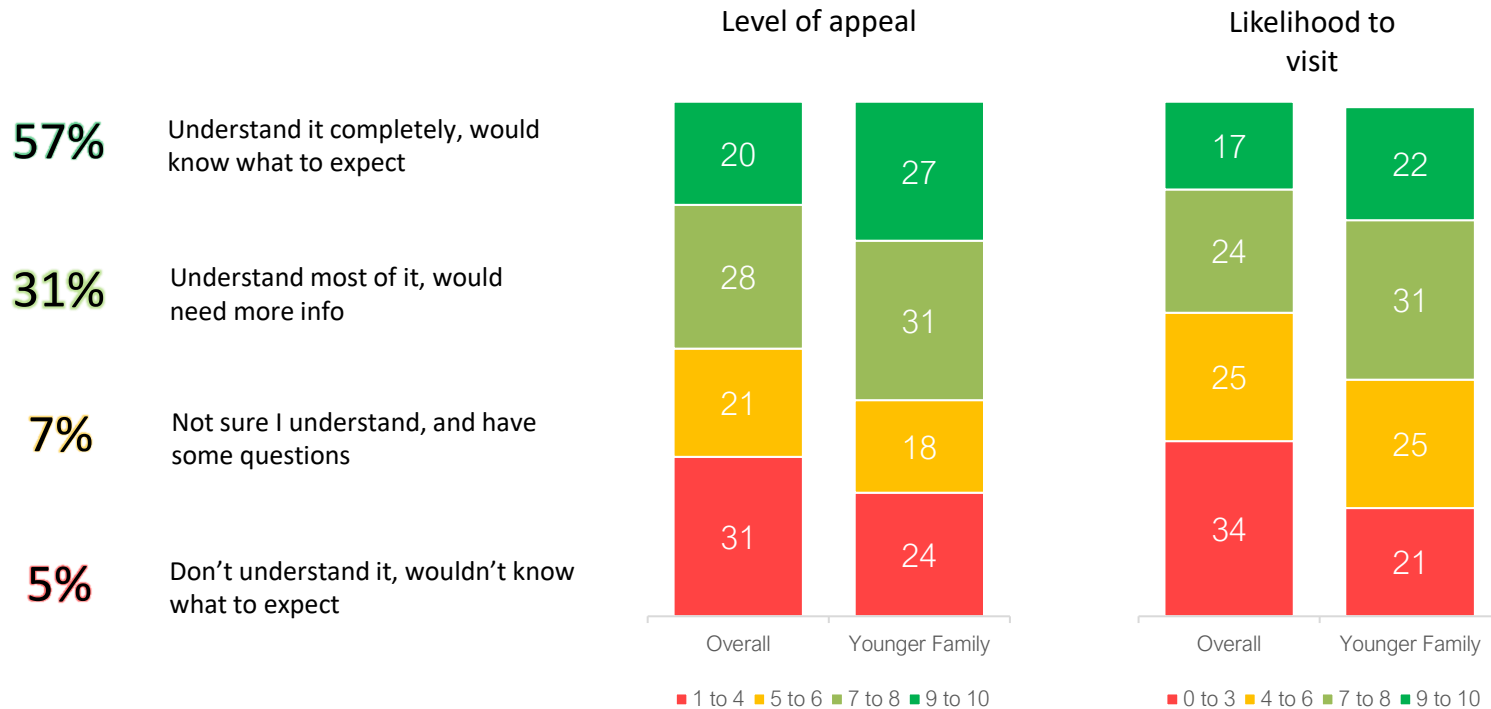


Learn the secrets of animation at one of the UK's biggest studios.

Join King Bee Animation at Elstree Studios for an exclusive tour of the very place where Star Wars, The Crown and Paddington were brought to life, followed by a hands-on animation workshop to help you create your very own masterpiece in the making. Aimed at those aged 8-18 years.



Specifically for children 8-18, this concept has significantly higher appeal amongst Younger Families who have primary-school age children.





Though primarily for Families, this concept could be opened up further to groups of friends or special interest groups who may be interested in animation.

Expected cost & time

£ 25.30

2.5hrs

Visit type



30%
This attraction specifically
Versus average of 33%



32%
Part of wider day out / trip
Versus average of 33%

Would visit with...




48% Family Unit



33% Partner




21% Group of Friends 



13% Extended Family



5% Specialist Group 



4% Intergenerational Family



= relatively higher / lower



A little more information on what the day entails, past animation, would help people understand this more and make a more informed decision.

Need to know more about...



Animation – information about how animation works

“Understand about animation and how to do it?”

Non-resident, 35-44, Younger Couples / Pre-Family



Memento – will participants get a souvenir / keepsake to take home

“More details about what's involved in the workshop and if participants will get a memento of the day to take away with them?”

Non-resident, 45-54, Older Family



Itinerary – information about the event's progression through the day

“More detailed information.”
Non-resident, 25-34, Early Family



Although the product is nice and may not appeal to all, the concept has strong appeal for those who have an interest in animation or creativity, and also appeal to a range of ages.

Reasons likely to visit
(8-10 score)

Unique / fun experience

Interested in / learn about animation

Big fans of The Crown / Star Wars

Appealing to all ages

“This would be fantastic for me and my daughter, appealing to all ages and it sounds very exciting.”

Non-resident, 45-54, Younger Family

“I’m uninterested in animation and I don’t think it would add more detail to what I can find from the internet.”

Non-resident, 18-24, Early Family

Reasons less likely to visit
(0-4 score)

Not for me / not a film fan

Not interested in the workshop / animation

Not suitable for older children / adults

Boring & dull



What would they change?



Less of a 'classroom' setting

“Make it look less like a classroom setting, have more activities and things to look at.”
Resident, 55-64, Older Family



Chance to showcase work

“A showing of the animations as a premier cinema experience?”
Non-resident, 35-44, Younger Couple / Pre-Family



Some merch / something to take

“Give participants at the workshop a memento by way of a reminder of the experience.”
Non-resident, 45-54, Older Family



Open to all levels / ages

“More information and more activities suited for adults.”
Non-resident, 18-24, Younger Couple / Pre-Family

Who finds it appealing?



As an attraction geared towards young children, it's unsurprising that this appeals most to Younger Families with children of primary school age. They would generally visit as a family unit.

As a hands-on film experience, we also see that they are likely to be into a wide variety of genres – ranging from Historical to Sci-Fi and Documentary.

OVERALL TOP 2 BOX APPEAL = 21%

Interest amongst...

Lifestage: Younger family (27%)

Age: 25-34 (26%), 35-44 (25%)

Children in HH: Primary school age (4 - 11 years) (35%)

Would visit Herts with: Family Unit (24%)

Type of visit: Overnight (23%)

Previously visited: Hatfield House (25%)

TV / Film Genres Liked: Historical (31%), Sci-Fi / Fantasy (30%) and Documentary (29%)





Concept 7 – Immerse yourself in the intriguing tales of Foundlings and film on a virtual reality tour

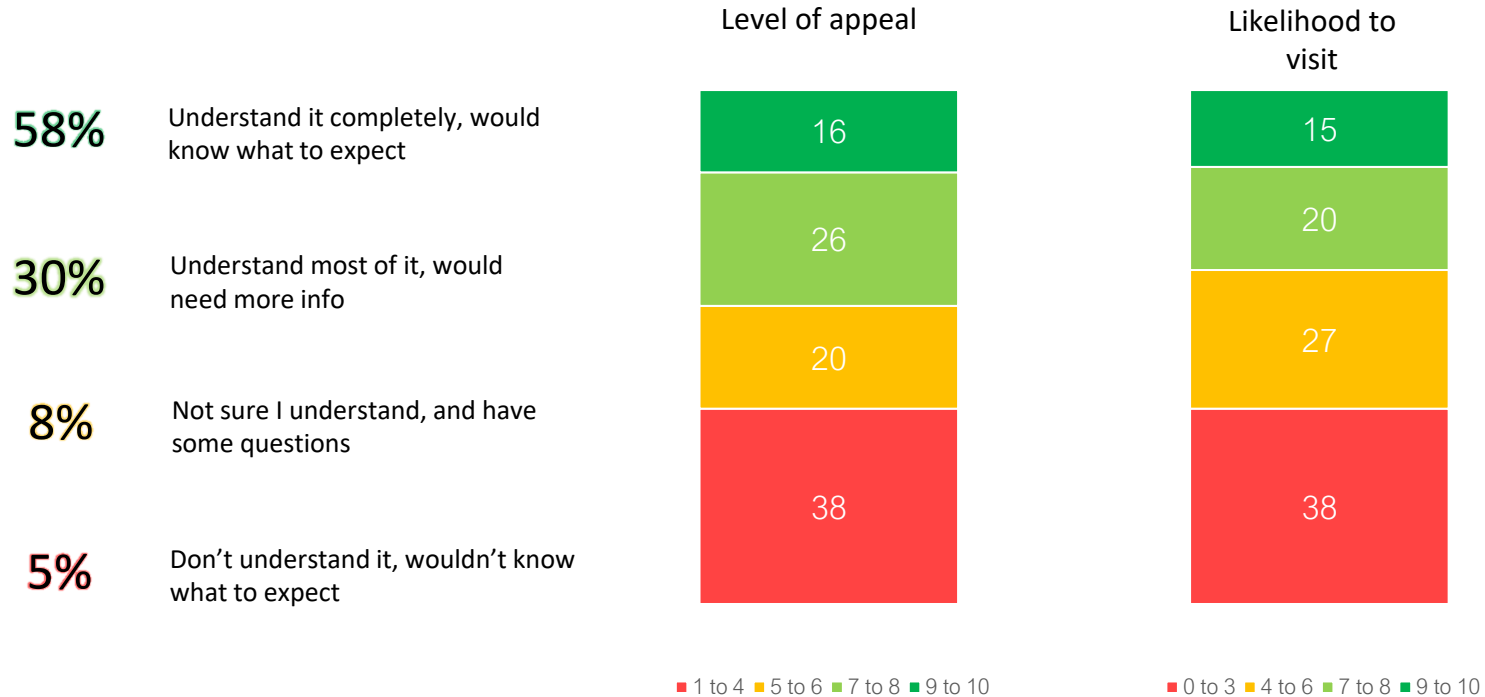


Immerse yourself in the intriguing tales of Foundlings and film on a virtual reality tour.

Take the immersive virtual reality tour of the grounds and buildings of Ashlyns School and learn all about its captivating history as a Foundling Hospital and set for the likes of *The Crown*, *Call the Midwife* and *Son of Rambow*.



This product has limited appeal – mostly as it leads with Foundlings rather than film locations. This makes it niche, and more film links would boost appeal.





Perhaps due to this, it performs low in terms of expected cost and duration. It could, however, have slightly stronger appeal for couples.

Expected cost & time

£ 18.00

2hrs

Visit type



30%
This attraction specifically

Versus average of 33%



31%
Part of wider day out / trip

Versus average of 33%

Would visit with...



43% Partner 



42% Family Unit



18% Group of Friends



9% Extended Family



4% Intergenerational Family 



2% Specialist Group



= relatively higher / lower



People appear to struggle imagining what this concept would look like or include – familiarity with the technology could be a potential reason for this.

Need to know more about...



VR – Where does it take place?
What does it include?

“I want more details about what exactly the immersive virtual reality tour involves. It sounds potentially interesting but is a bit vague.”

Non-resident, 45-54, Older Family



Images – What does it look like?

“There should be more detail in the pictures.”

Non-resident, 35-45, Early Family



Accessibility – Is it suitable for wheelchair users? For young children?

“Does the Virtual Reality equipment work with hearing aids?”

Non-Resident, 55-64, Older Couple



Those specifically interested in this part of history or Foundlings would be likely to visit, but more film links are needed to boost appeal.

Reasons likely to visit
(8-10 score)

Fan of a film or series recorded there

Visually appealing

Interested in history

Interested in Foundlings

"I love watching the crown and I think it would be interesting to know more about where it was filmed
Non-resident, 25-34, Younger Couple / Pre-family

"I would rather see I in real life than virtual reality"
Non-resident, 35-44, Older Family

Reasons less likely to visit
(0-4 score)

Not suitable for younger children

Not interested in this story

Not enough information

Too far to travel



What would they change?



Make real-life, not virtual

“Make it real life instead of virtual!”
Resident, 45-54, Older Family



Better known shows / films

“A tie in with more interesting TV and film franchises.”
Non-resident, 55-64, Older Couple / Empty Nesters



Add something other than VR tour

“Sounds really boring so maybe make it more fun by having interactive things to do.”
Non-resident, 45-54, Older Family

Who finds it appealing?



As this concept is more adult oriented, it is much more likely to be one that people visit with their partner rather than family.

With similarities to both Knebworth and Hatfield, it's more likely to attract individuals who have visited these destinations. One for those interested in experiences linked to history and reality.

OVERALL TOP 2 BOX APPEAL = 16%

Interest amongst...

Lifestage: Early family (30%)

Age: 25-34 (19%)

Children in HH: Pre-school age (3-5 years) (24%)

Would visit Herts with: With partner (18%)

Previously visited: Hatfield House (19%)

Previously visited: Knebworth House (25%*)

TV / Film Genres Liked: Romance (28%)

TV / Film Genres Liked: Historical (24%)

Type of visit: Overnight (23%)

*Low sample size





Concept 8 – Take flight to the 1940s on an exclusive World War II experience at De Havilland Museum

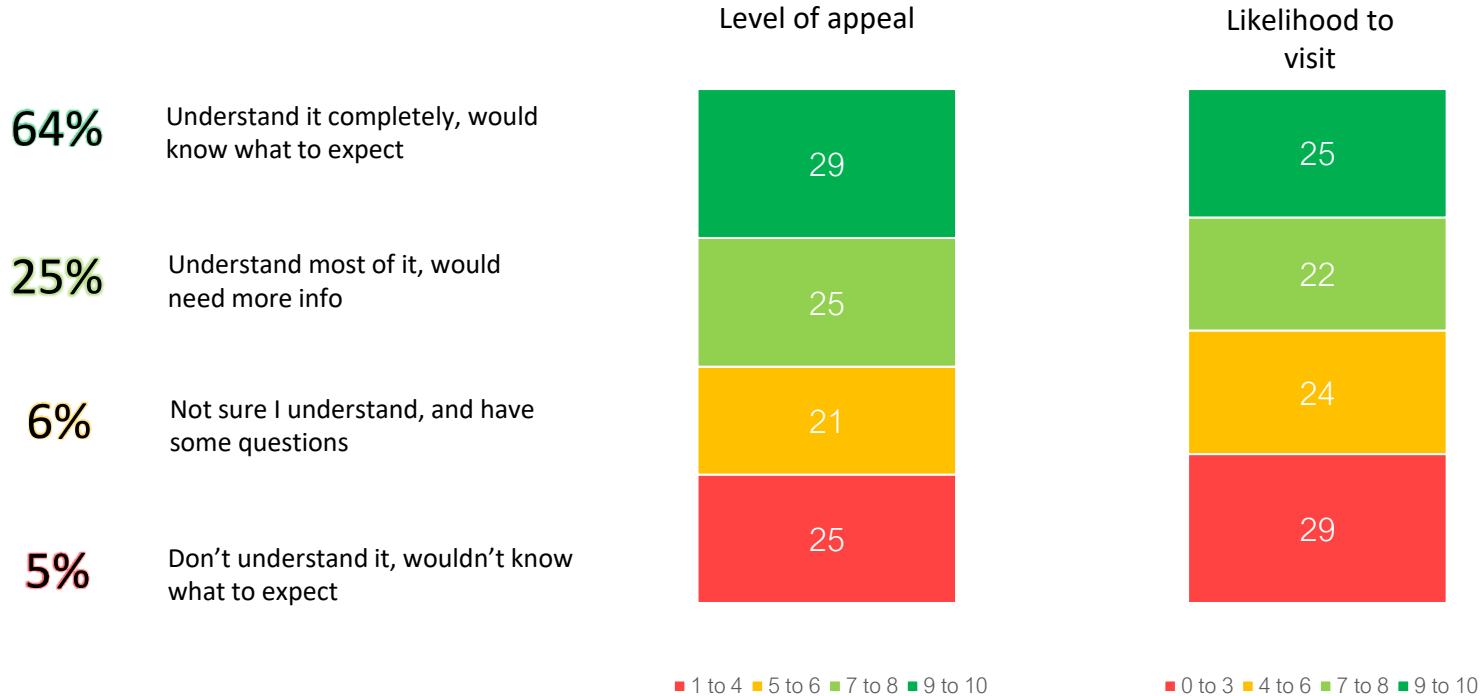


Take flight to the 1940's on an exclusive World War II experience at De Havilland Museum

Experience the thrills of flying the legendary DH98 Mosquito without leaving the ground in the new Mosquito Flight Simulator. Re-enact real dare-devil raids to release French resistance members from prison or destroy Gestapo headquarters in Oslo or Copenhagen. Or you might like to be a movie star flying the Norwegian fjords (like 633 Squadron), bouncing bombs into a rail tunnel, like David McCallum (Mosquito Squadron) or Shepherding home a lost aviator like John Travolta. If you prefer the real thing, you can book a cockpit experience in one of our historic Mosquitos, learning about its history and gaining a commemorative certificate and photo of you in the pilot's seat.



This experience concept is very well understood by most potential visitors, and both appeal and likelihood to visit are high.





Visitor groups suggest this could be an attraction for many types of people – from families to couples and intergenerational families (grandparents).

Expected cost & time

£ 21.00

2.5-3hrs

Visit type



40%
This attraction specifically

Versus average of 33%



27%
Part of wider day out / trip

Versus average of 33%

Would visit with...



45% Family Unit



40% Partner



16% Group of Friends



9% Extended Family



7% Intergenerational Family



4% Specialist Group



= relatively higher / lower



The description appears to do a good job of bringing the experience to life – but more images of the actual simulator would help this further.

Need to know more about...



General Information – How much does it cost? For how long?

“I need more details required regarding cost, duration, refreshment facilities, dates/times open, disabled facilities.”
Non-resident, 65-74, Older Couple / Empty Nester



Parking – Where should visitors park? Enough spaces?

“I’d like to know how easy it is to get to and park.”
Non-resident, 55-64, Older Couple



Images – What does the simulator look like? What will the visitors see?

“Needs more photos instead of words.”
Non-resident, 18-24, Younger Couple / Pre-family



The concept appears to have wide appeal for 'the whole family' – combining education and history with a fun and unique simulation experience.

Reasons likely to visit
(8-10 score)

Unique / fun experience

Educational

Interested in aeroplanes and history

Appealing to the whole family

“This appeals to our whole family unit and seems like it is suitable for all ages.”
Non-resident, 25-34, Young Family

“Doesn't seem kid friendly”
Non-resident, 35-44, Young Family

Reasons less likely to visit
(0-4 score)

Not suitable for younger children

Not interested in aeroplanes

Not enough information

Too far to travel



What would they change?



More for the young to do here

“Make it a bit more livelier for the younger generation.”
Non-resident, 45-54, Younger Family



Make it historical / informative

“Make it more historical and factual instead of basing it on films and people who appeared in them.”
Non-resident, 75+, Older Couple / Empty Nester



A real-life flight experience

“Maybe having the chance for visitors to be flown on a plane.”
Non-resident, 25-34, Younger Couple / Pre-Family

Who finds it appealing?



This concept appeals to people with early families and empty nesters, aged 25-34 & 75+. The broad range of age groups and earlier likelihood to visit with Intergenerational family, suggests this is one for all the family, including grandparents.

OVERALL TOP 2 BOX APPEAL = 29%

Interest amongst...

Lifestage: Early family (36%) and Empty Nesters (22%)

Age: 25-34 (36%) 75+ (33%)

Children in HH: No kids (22%)

Would visit Herts with: Family Unit (30%)

Would visit Herts with: Extended Family (55%)

Previously visited: Hatfield House (35%)

Previously visited: St Albans Cathedral (34%)

TV / Film Genres Liked: Historical (35%)





Concept 9 – Add a touch of glamour to your photography portfolio with a series of exclusive themed Shoot Days.

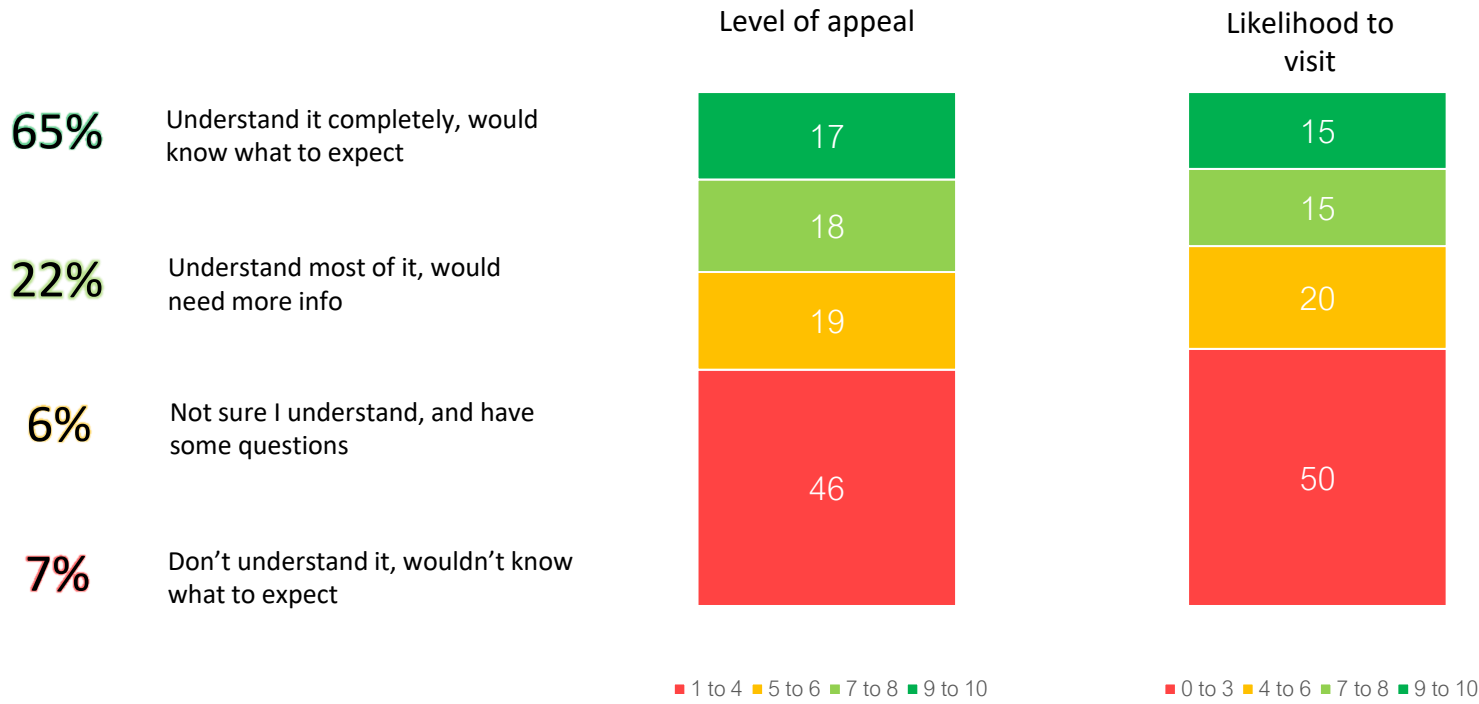


Add a touch of glamour to your photography portfolio, with a series of exclusive themed Shoot Days.

Suitable for photographers of all levels, step behind the lens and capture some vintage magic at either our 1940s inspired Pinups With Planes photoshoot day with an original WWII Mosquito at De Havilland Aircraft Museum, or curate your own regency era inspired fashion editorial during our Ballroom Regency photoshoot day at the luxurious Pendley Manor. With location, models and styling all sorted for you, the only things you need to bring are your camera and your creativity



This concept has very limited appeal, meaning half of respondents would be highly unlikely to visit the attraction. There is an indication that it appeals most to specialist interest audiences, or young couples.





It doesn't appear to be very family-friendly. Instead, it appeals to specialist interest groups – likely those into photography or multimedia.

Expected cost & time

£ 22.00

2.5 hours

Visit type



29%
This attraction specifically

Versus average of 33%



25%
Part of wider day out / trip

Versus average of 33%

Would visit with...



40% Partner



31% Family Unit



20% Group of Friends



8% Extended Family



8% Specialist Group



4% Intergenerational Family



= relatively higher / lower



With specialist interest groups more likely to find this experience appealing, group sizes are front of mind.

Need to know more about...



General Information – How much does it cost? For how long?

“A lot more information is required.
Not sure what you do, what you need, etc.”
Non-resident, 45-54, Older Family



Group Sizes – How many people? Can you do it individually?

“How is it organised, is it small groups at a time, short individual timeslots (or taking turns) or is there a big crowd of people trying to take photos”
Non-resident, 35-44, Younger Couple / Pre-family



While it could appeal to families and those with an interest in history, it is more for people interested in Photography specifically or other creative past-times.

Reasons likely to visit
(8-10 score)

Unique creative experience

Interest in Photography

Interested in aeroplanes and history

Appealing to the whole family

“It looks like a very unique opportunity and one, if well organized, I would be happy to pay top dollar for.”
Non-resident, 35-44, Younger Couple/ Pre-Family

“It sounds like this activity would be more interesting to photographers or people who are into aircrafts.”
Non-resident, 25-34, Early Family

Reasons less likely to visit
(0-4 score)

Not suitable for younger children

Not interested in photography

Themes not of interest

Sounds generally boring / uninteresting



What would they change?



**More for non-
photographers**

“I would make it more appealing to people who are not photographers - it is quite limited in it's target audience.”
Non-resident, 25-34, Younger Couple / Pre-Family



**Make it available to
groups as well**

“Make it available as a group shoot as well.”
Non-resident, 25-34, Younger Family



**Avoid 'sexist' pin up
associations**

“I hoped we were past the 'pin up' days where sex was used to promote cars, etc. I love photography but would find this appalling.”
Resident, 65-74, Older Couple / Empty Nester

Who finds it appealing?



This concept appeals primarily to those with young families, aged 25-34. However, this appears to be less of a family activity. Their earlier mentioned likelihood to visit with specialist groups, plus the fact they're likely to visit Herts with their partner, suggests this could be a concept for those with a photography hobby specifically.

OVERALL TOP 2 BOX APPEAL = 17%

Interest amongst...

Lifestage: Early family (27%)

Age: 25-34 (32%)

Children in HH: Mixed (Pre school (23%), Primary (22%), Secondary (22%))

Would visit Herts with: Group of families (27%), Partner (20%)

Type of visit: Overnight (21%)

TV / Film Genres Liked: Romance (23%) and Horror (21%)





Concept 10 – Mind your Ps and Qs with afternoon tea fit for royalty at Pendley Manor

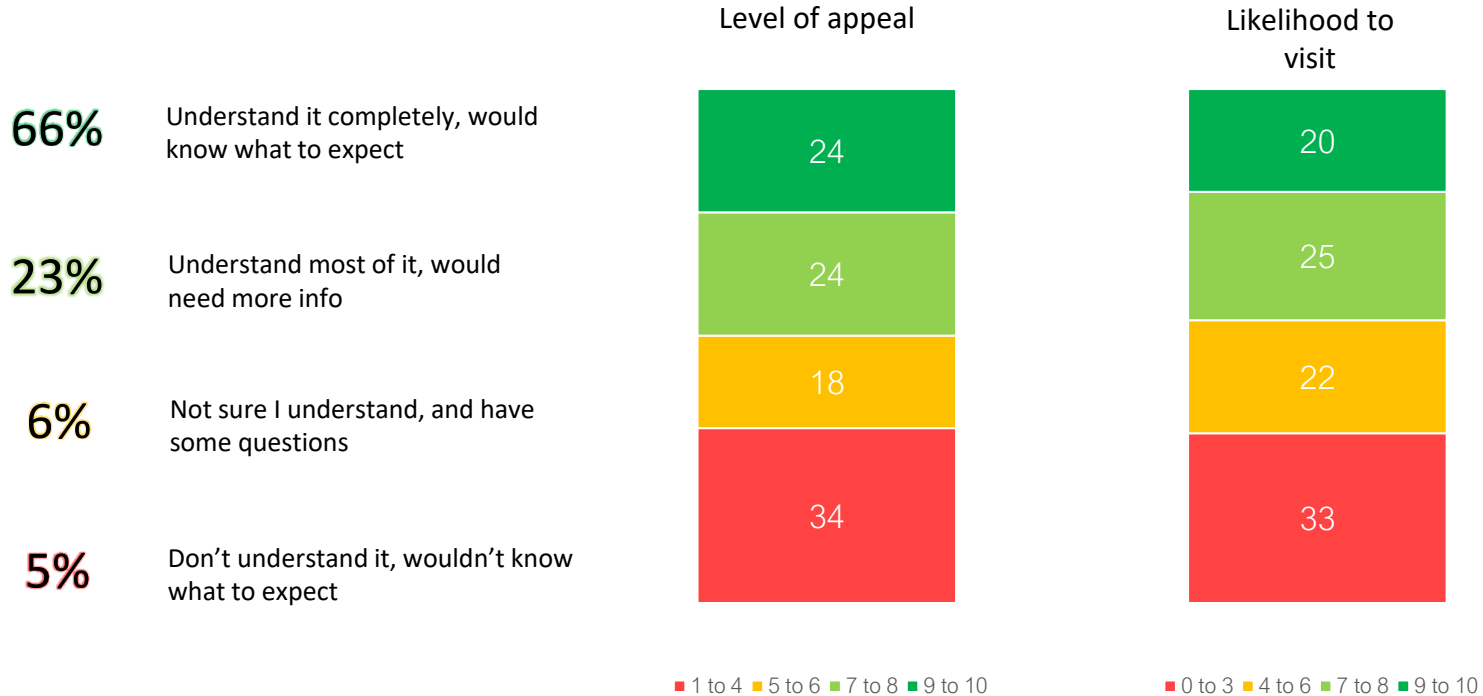


Mind your Ps and Qs with afternoon tea fit for royalty at Pendley Manor.

Take afternoon tea at Grade II listed Pendley Manor for a true taste of British etiquette. Do you know the rule about jam and cream on your scones? The correct way to stir your tea or whether to put milk in first or last? Not sure... then why not take a course and perfect your skills so when you watch the next series of *The Crown* you'll know if they are doing it right! Where better than Hertfordshire to perfect your skills, the home of the diamond in Netflix's royal tiara, boasting multiple locations used in *The Crown*. At Pendley you'll not only have all the fun of learning how, but you'll get to try every layer of the cake stand.



Appeal and likelihood to visit are reasonably high for this experience concept. Though with few 'middle of the road' responses, around a third do not find it appealing.





It has a wide appeal for couples, groups of friends and extended family. It is expected to cost a lot, and has high appeal to visit this attraction specifically.

Expected cost & time

£ 25.00

2.5hrs

Visit type



36%
This attraction specifically

Versus average of 33%



32%
Part of wider day out / trip


Versus average of 33%

Would visit with...




45% Partner 




34% Family Unit 




25% Group of Friends 



14% Extended Family 



7% Intergenerational Family 



2% Specialist Group



= relatively higher / lower



Though it is appealing, people may need more to differentiate this from your regular afternoon tea. What does it do that others don't?

Need to know more about...



Summary – What will it involve?
For how long?

“Should be more specific about what you get / what happens.”
Resident, 45-54, Older Family



What makes it different – What separates this from a regular afternoon tea?

“Details of what makes it unique.”
Non-resident, 25-34, Younger Couple



Cost – How much will it cost?

“To have more details on the ticket price.”
Non-resident, 35-44, Early Family



The idea of afternoon tea in a Crown setting makes this more appealing – however too much focus on etiquette could be off-putting.

Reasons likely to visit
(8-10 score)

Like afternoon tea

Fan of The Crown

Interested in learning etiquette

Interested in historical buildings

“My wife would love this activity. She watched the show and it would be an awesome date.”

Non-resident, 25-34, Young Family

“I don't want to be judged for how I'm eating my afternoon tea.”

Non-resident, 18-24, Younger Couple / Pre-family

Reasons less likely to visit
(0-4 score)

Dietary restrictions

Doesn't appeal to younger children

Generally not interested

Not a fan of the etiquette concept

What would they change?



**Differentiate from
other afternoon tea**

“Needs a quirk. A dramatization,
fancy dress something like that.”
Non-resident, 25-34, Older Family



**Include tour / walk
around grounds**

“I would make it more interesting
and possibly include tours of
places used in the Crown.”
Non-resident, 18-24, Younger
Couple / Pre-Family



**Avoid too much
reference to class**

“I don't like any of this sorry....a
class system is not correct and
not something I would wish to get
involved in.”
Non-resident, 45-54, Older Family



**Don't make too strict
/ restrictive**

“It sounds as if it will be heavy on the
instructions I think they need to make
it sound more fun”
Non-resident, 55-64, Older Couple /
Empty Nester



Who finds it appealing?



The concept with one of the broadest ranges of appeal, from those with early families to groups of friends or older visitors.

It is the most appealing concept to those likely to be visiting Hertfordshire with a group of friends, but also for Early Families and those aged 75+.

OVERALL TOP 2 BOX APPEAL = 24%

Interest amongst...

Lifestage: Early family (40%), No kids (19%)

Age: 18-24 (31%), 25-34 (32%), 75+ (43%*)

Would visit Herts with: Group of friends (31%)

Would visit Herts with: Partner (22%)

Previously visited: Hatfield House (30%)

TV / Film Genres Liked: Reality (40%), Romance (36%)



Recommendations





Six things to help boost Hertfordshire visitations

Hertfordshire has many strong & positive associations that can be utilised to cater for existing visitor audiences, but also increase the encourage new audiences to consider the region...

Young families are key, but cater for the whole family – including grandparents

Target younger audiences with fun, group activities – challenge ‘old’ image

Go beyond the relaxing countryside image to build a distinct identity

Promote existing experiences and quality accommodation to encourage longer visits

Increase awareness of region’s film credentials – create an identity around it

Incorporate social, influencers and reviews to provide personal experiences



VISIT HERTS



Six screen tourism findings

Screen tourism can undoubtedly boost tourism, but should focus on playing up to Hertfordshire's existing image of a beautiful, green and historic area of the country...

Existing association with film experiences is there – the project can build on this

Connect attractions with Hertfordshire's 'green' and 'historic' identity

Young families / couples are vital for screen tourism – make them priority

Where possible, tie screen tourism attractions with specific Films & TV shows

Link experiences with wider amenities – give more reason to visit, and to stay

Ensure attractions are accessible – easy to get to, and easy to get around



VISIT HERTS



Key audience profile: Demographics & Interests



25-44 years
old



Early / Young
Family Lifestage
(Children 0-11)



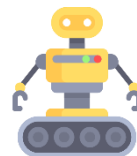
Affluent
(HH income £50K+ /
AB social grade)



Surrounding
counties
(Herts, Essex, Bedfordshire
& London)



History &
Heritage



Tech &
Gadgets



Fashion



Nature &
Wildlife

Higher than average interest in...



Key audience profile: Visit Profile



Book close to the visit
(Within one month)



Visit with family or partner



Use digital sources to plan
(social media, vlogs, holiday apps)



Use personal experience to plan



Book via local travel agency (Hays Travel, TUI)

Relatively higher importance for...



Environment attractions



Things for young kids



Events & Festivals



Art & culture attractions



Immersive activities



Sustainable Attractions



Key audience profile: Attractions & Screen Tourism

Much more likely to have visited / intend to visit...



St Albans



Hatfield House



Paradise Wildlife



Knebworth House



Lee Valley Regional

Relatively higher genre interest...



Action / Adventure



Comedy



Romance

Relatively higher appeal for:

Concept 1 (Regal TV & Film tour)

Concept 3 (Ashridge Estate Forest)

Concept 9 (Themed Shoot Days)



Disabled Respondents Profile

For day trips, place relatively higher importance on...



34%
Visited Herts
in L12M



65%
Visited Herts
in L5Y



Transport links
/ Easy to get
there
(44% vs. 42% overall)



Good
opportunity for
shopping
(30% vs. 22% overall)



Events /
Festivals
(25% vs. 22% overall)



Attractions related to
art, literature and
culture
(25% vs. 20% overall)



Museums
(21% vs. 17% overall)



High adrenaline or
energetic activities
(13% vs. 10% overall)



Disabled Respondents Profile

Relatively more likely to...



Book 4-6 months in advance
(9% vs. 5% overall)



Use literature / pamphlets to plan
(14% vs. 9% overall)



Have taken an overnight trip to Herts
(64% vs. 50% overall)



Book via local travel agency (15% vs. 12% overall)



Stayed in a holiday home / static caravan
(17% vs. 12% overall)



Stay with friends / relatives
(16% vs. 10% overall)



Expect to travel to Herts via taxi
(8% vs. 3% overall)



Be influenced to visit by how easy it is to get to / around
(to = 53% vs. 46% overall)
(around = 47% vs. 42% overall)

Keep in touch...

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