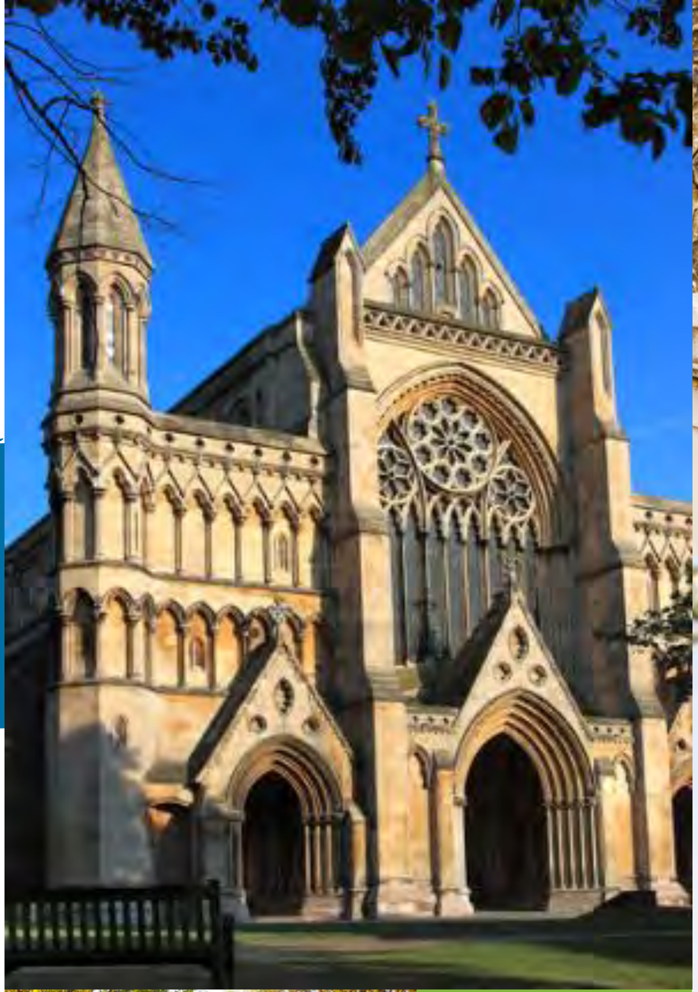
VISIT HERTS

Hertfordshire Annual Residents Study

September 2023



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VISIT HERTS

Introduction

Recent years have redefined people's motivations to travel, their needs and priorities, and the expectations they now place on destinations, turning the dial on communities and on the environment, changing the consumer experience from a passive to an active one.

Consumer sentiment shows that the staycation and local travel trends are strong, and we know that our residents have kept Hertfordshire's visitor economy going, contributing to the destination's post-pandemic recovery. Not only have residents visited and rediscovered what's on their doorstep, but they have also opened their doors to their families and friends to do so too. Residents are making recommendations, sharing their knowledge and becoming ambassadors of their local areas.

In a highly competitive domestic tourism landscape, successful destinations are those that understand their audiences, adapting their offers in a way that contributes to the wellbeing of local communities, supporting local businesses, advocating for local produce and encouraging nature positive developments. A great place to visit is also a great place to live and work, and through understanding and championing perceptions around Hertfordshire's quality of life, insights can be used to attract the skilled workers needed for our county to flourish, helping to ease the tight labour market and using effective place marketing to attract inward investment.

This report is based on the first annual survey that we have carried out amongst Hertfordshire's residents, to understand and track their views on the impact that tourism has on their local communities and on their wellbeing. The report also sets out to map residents' leisure behaviour locally, to assist Hertfordshire businesses and Visit Herts in identifying the most efficient ways to reach this audience, to provide them with great leisure opportunities and to inform future destination development decisions.

Methodology

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Data Collection

- Online quantitative fieldwork via social media paid promotion and dedicated newsletters to the Visit Herts database carried out in June and July 2023
- Targeted at 18+, Hertfordshire residents
- Focus on impacts, perceptions local leisure behaviours and deep dive on demographics
- Where possible, quotas were set on regional breakdowns and on age and gender
- 840 valid, completed survey responses

Objectives

- Refine hyper-local visitor profile
- Capture the awareness and perception of local areas in Herts as day and overnight leisure destinations
- Track tourism impacts on wellbeing and local engagement
- Capture insights around future visit intentions and needs
- Identify potential challenges and ways to turn these into opportunities
- Provide insights to help support businesses in the sector and inform Hertfordshire's development priorities and strategies

Considerations

- The survey was broken down into various sections, with statements focusing on residents' local area
- *Respondents were informed that their **'local area'** is defined as the city/town/village that they live in, rather than their immediate neighbourhood. The survey also defined any references to 'tourism' as people on day trips and those coming from further away for a few days or more*
- Some responses have been combined for ease of presentation and interpretation (i.e., those that selected 'strongly agree' and 'agree' to present an overall level of agreement)
- Whilst the report is based on all respondents (Hertfordshire residents overall), some questions are analysed by district, where results show a meaningful difference
- A full list of questions and percentages is included in the appendices

Hertfordshire Annual Residents Research: 2023

KEY FINDINGS

This report is based on findings from the Hertfordshire Annual Residents Research, which aims to gather valuable insights into the perceptions and impacts of tourism activity in the county.

44% Consider their local area to be a tourist destination

61% Agreed that the overall impact of tourism on Hertfordshire is positive - with only **2%** selecting 'negative' & the remaining % selecting 'neutral/don't know'

Perceived Main Attraction

- Countryside: 30%
- Museums/Historic sites: 26%
- Food & Drink/Film/TV: Both 14%

840 Hertfordshire Residents

Online Survey

- **96%** Agreed tourism improves the local economy
- **91%** Agreed tourism increases employment opportunities
- **94%** Agreed tourism preserves historic buildings and monuments
- **26%** Agreed local transport services are improving
- **83%** Agreed tourism improves local investment
- **68%** Agreed that tourism limits parking spaces available to local people

In the last year...

65% took a leisure day trip in Herts
16% took an overnight leisure trip in Herts

42% have had friends and relatives to stay in the last 6 months

- **76%** Consider film/TV productions to be a strength for Hertfordshire
- **54%** Of respondents' household finances have worsened in the last year

77% Of respondents agreed with the statement 'I live in a beautiful area'

88% Of respondents agreed that overall, they are very satisfied with their life

Sample & Demographics

- The majority of respondents were female (**84%**), and there was a fairly good breakdown of various age brackets.
- Respondents most commonly stated they live in a town setting (**70%**), with **45%** having lived in their area for over 25 years, although this was closely followed by those who have lived in their local area between 5-25 years (**41%**).
- **55%** of respondents did not have any children under 18 living in their household, followed by those with children aged 5-11 (**19%**) and 12-18 years (**18%**).
- The survey also asked respondents how their household finances have been impacted over the last year and the largest proportion stated these had worsened to some degree (**54%**). This highlights the potential negative impact of the cost-of-living crisis on households, which in turn will have a knock-on effect on spending ability in terms of the leisure visits in the area.

Gender (%)

15% 84%

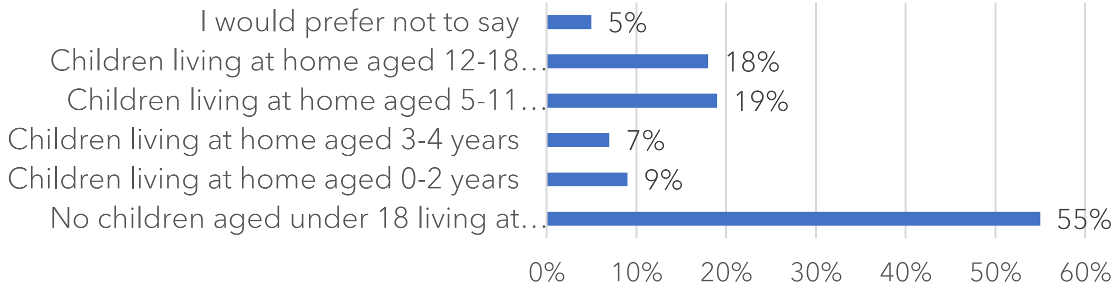
Area of Residence (%)

Town 70%

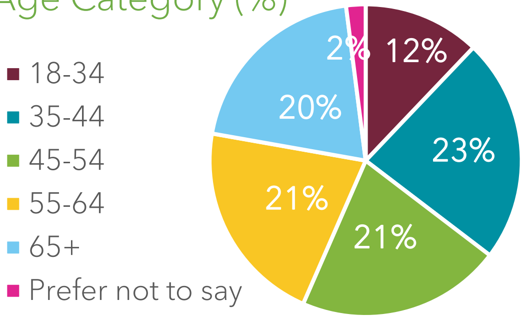
City 10%

Rural 20%

Children in the Household (%)



Age Category (%)



Length of Residency (%)

<5yrs 14%

5-25yrs 41%

>25yrs 45%

Household Finances (%)

Improved 12%

Stayed the same 33%

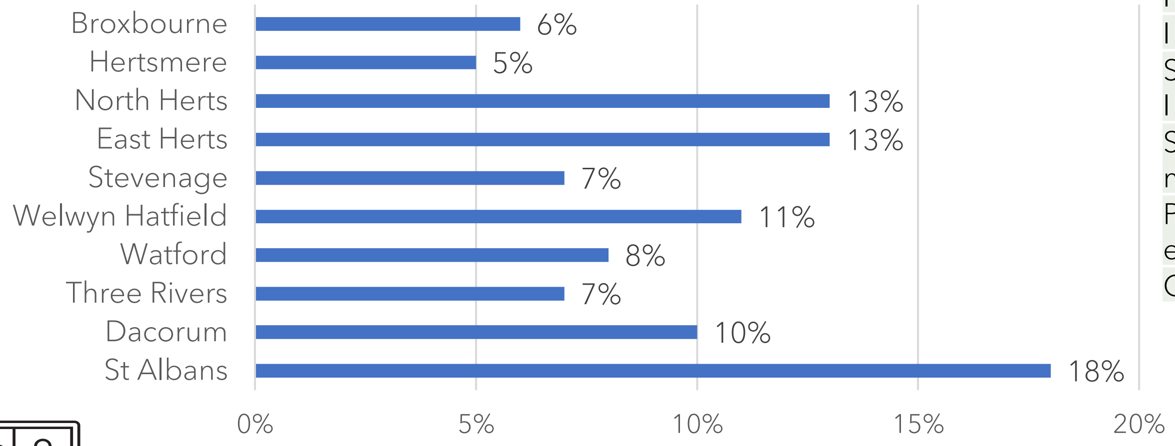
Worsened slightly 39%

Worsened significantly 15%

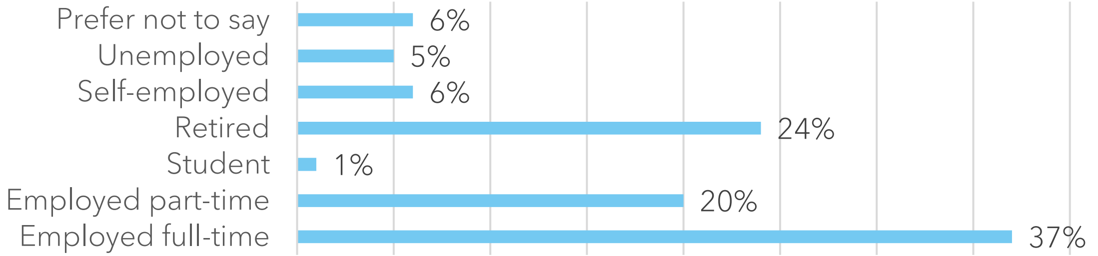
All Respondents BASE=840

- The largest proportion of respondents originated from St Albans (**18%**), followed by North Herts and East Herts (both **13%).**
- The largest proportion were employed full-time (**37%**), followed by those who are retired (**24%**) and those who work part-time (**20%**).
- Respondents were asked to specify what best describes their working patterns considering the pandemic, with **44%** stating that they have always travelled to work and have continued to do so over the pandemic. **29%** stated that their organisation introduced working from home as a result of the pandemic and have continued hybrid measures.
- **5%** of respondents indicated that someone in their household works in tourism, with this being **3%** for the film/TV industry. In terms of the former, this is also in line with findings from the latest Hertfordshire Economic Impact Cambridge Model Study, which estimated that tourism supports 6% of all employment in the county.

District of Residency (%)



Work Status (%)



Looking at the following statements, which one best describes your working patterns considering the COVID-19 pandemic?	%
I have always travelled to work, and I have continued to do so over the pandemic	44%
I have always worked from home	8%
Since the pandemic, my organisation introduced working from home measures, but I have now returned to the workplace full-time	6%
Since the pandemic, my organisation introduced working from home and hybrid measures that are continuing, and this is now combined with days at the workplace	29%
Prior to the pandemic, I had already began working in a more hybrid way (for example working from home on certain days)	7%
Other	6%

Does anyone in your household work in the tourism industry?

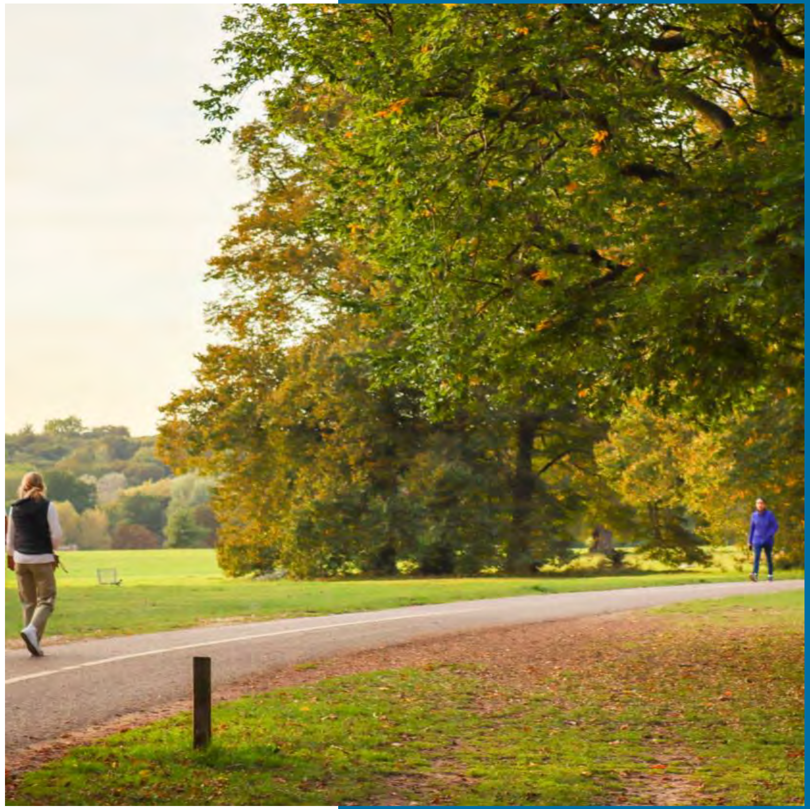
Yes 5%

No 95%

Does anyone in your household work in the film/TV industry?

Yes 3%

No 97%



Impacts of Tourism

04

Impacts of Tourism on local area

	Agree*	Disagree*	Neither agree nor disagree
Tourism preserves historic buildings and monuments	94%	1%	4%
Tourism increases demand for local historical and cultural attractions	94%	2%	4%
Tourism increases availability of local recreation facilities/opportunities	79%	7%	13%
Tourism is harmful to natural places like the countryside	50%	30%	20%
Tourism limits parking spaces available to local people	68%	15%	17%
There are too many visitors in my local area	10%	64%	26%
I like to meet visitors to my local area	58%	9%	34%
Tourism protects and enhances the natural environment	43%	21%	35%

*Combined percentages of all agreement/disagreement levels. Percentage totals may vary due to rounding.

All Respondents. BASE=840

The survey gave respondents the opportunity to provide any additional information following their response to the statement – 'tourism protects and enhances the natural environment'. The following presents an overview of key themes that were identified from the responses provided.

Respondents acknowledged that tourism is a key mechanism for generating income and funding for the local area, which can then be reinvested into initiatives and projects to help protect and conserve the natural environment and maintain local attractions.

Responses captured the need to effectively manage visitor footfall and ease pressure on popular sites thorough visitor dispersal and promoting lesser-known destinations and sites to visitors.

Tourism and increased footfall can cause significant pollution, such as litter and excessive traffic, alongside damage and erosion to public footpaths and wildlife habitats.

There is a need to ensure that development and infrastructure work are carried out sustainably and look to protect the environment as much as possible.

It is essential that destinations and businesses adopt sustainable tourism policies and work to educate visitors to respect and protect the environment through effective and educational messaging.

"The revenue created from tourism can be used to fund initiatives that preserve nature"

"Through tourism we have more capital for resources to better protect our community"

"Sometimes tourists don't respect the countryside and leave litter"

District Insights

Residents acknowledge tourism's role in preserving heritage and in creating demand for local historical and cultural attractions.

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High levels of agreement, regardless of district of residence, are also shown towards tourism increasing the availability of local recreation facilities/ opportunities for residents.

•••

Regarding the role tourism plays in harming and/or protecting the environment, many respondents agree, on the one hand, that tourism can harm nature, but on the other, that it can help protect it. Differences appear by district, with Welwyn Hatfield **(61%)** and North Herts **(57%)** residents displaying higher levels of agreement around the harmful impacts of tourism.

•••

Three Rivers **(55%)** and Broxbourne **(48%)** residents agreed to a larger degree that tourism protects the environment, compared to county-wide results.

•••

This sentiment may be influenced by various organisations in these areas and their activity around effectively managing landscapes so that they can be enjoyed for leisure with minimal impact on the environment. This includes Three Rivers being home to Rickmansworth Aquadrome and the Colne Valley Regional Park and being on the edge of the Chilterns AONB, alongside Lee Valley Regional Park Authority, managing landscapes and waterways in Broxbourne.

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Parking limitations due to tourism are highlighted as a bigger issue in North Herts **(77%)** and Watford **(76%)**, and less so in Dacorum **(58%)** and Stevenage **(59%)**. Among respondents based in Watford, parking challenges may also be influenced by more limited availability on match and event days, with the town centre only having a certain capacity.

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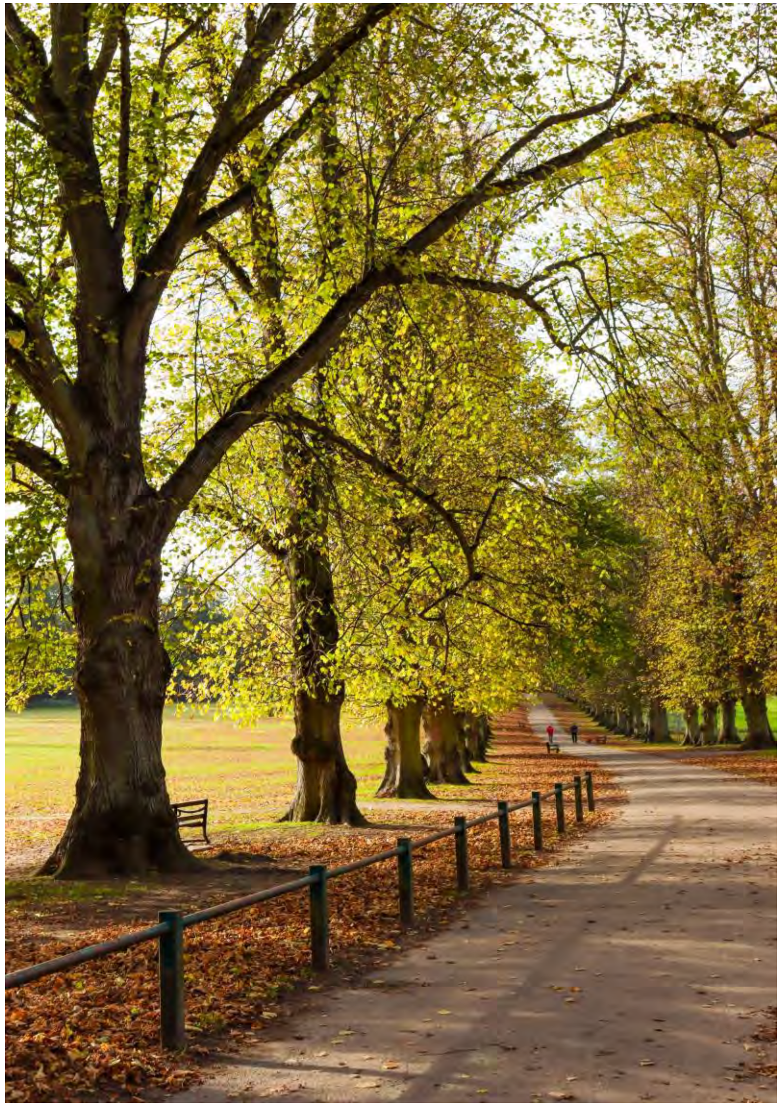
Interestingly, only a small proportion of North Herts residents felt that there are too many visitors in their local area **(6%)**, with least agreement in East Herts **(4%)** and Hertsmere **(5%)** and highest agreement among residents of Three Rivers, Watford and Stevenage **(17% each)**.

•••

Consequently, this sentiment may be impacted by the location of larger attractions, including Warner Bros. Studio Tour London - The Making of Harry Potter based in Three Rivers, alongside Watford Junction train station being used by visitors to travel there. In addition, Stevenage is in close proximity to Knebworth House, and both Stevenage and Watford are urban areas and may feel less open compared to other areas with more countryside.

Benefits of Tourism on local area

	Agree*	Disagree*	Neither agree nor disagree
Tourism increases employment opportunities	91%	2%	6%
Tourism improves the local economy	96%	1%	3%
Tourism improves local investment, development and infrastructure spending in the economy	83%	3%	14%
Tourism increases prices for local services and amenities	52%	13%	36%
Tourism reduces my ability to access local services and facilities	21%	43%	36%
Local infrastructure is improving (e.g., public toilets, playgrounds, car parks, footpaths, cycle paths)	52%	23%	25%
Local transport services are improving	26%	39%	35%



*Combined percentages of all agreement/disagreement levels. Percentage totals may vary due to rounding.

All Respondents. BASE=840

District Insights

Agreement with tourism increasing employment opportunities was high among all districts, with the highest one recorded among Broxbourne residents **(98%)**.

•••

Tourism is also seen to improve local investment and development spending, with the highest level of agreement being among Dacorum residents **(87%).** This sentiment could be linked with recent activity and investment through Think Hemel, which focuses on place making and working with partners and communities to revitalise the town centre and attract inward investment. Agreement was slightly lower among Stevenage respondents **(77%)**.

•••

Over half of all respondents agreed that tourism increases prices for local services, with only **13%** feeling that it does not, sentiment which was mirrored at district level too.

•••

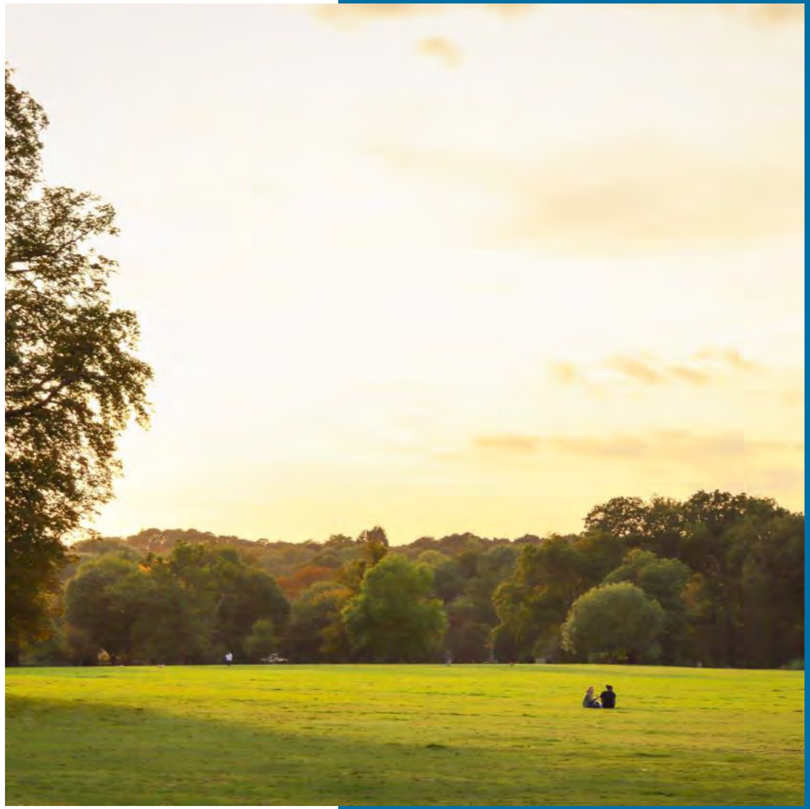
52% of all respondents believe that local infrastructure is improving, which is higher in Stevenage **(61%)** and Broxbourne **(58%)**, and slightly lower in St Albans **(48%)** and Hertsmere **(46%)**. The high level of agreement in Stevenage could be attributed to the ongoing investment in the town centre and regeneration programme, while Broxbourne has benefited from Levelling Up Funding to fund the regeneration of Waltham Cross town centre.

•••

Agreement with local transport services improving is low, with just a quarter of all respondents selecting this, which may have also been influenced by the recent rail strike action. More residents agreed with this statement in Stevenage **(41%)**, Three Rivers **(36%),** and Watford **(35%),** with less agreeing in Dacorum **(20%)** and North Herts **(18%)**. Overall, perceptions around transport will be impacted by the county having more well-connected services into London and the Midlands, whilst there are recognised challenges with transport connections from the East to West of the county.

Length of Residency

Respondents who have lived in their local area for under 5 years (**14%**) were more likely to agree that tourism improves local investment and development (**95%**), which was **12%** higher compared to all respondents. A higher proportion of this group (**66%**) also agreed that local infrastructure is improving, **14%** more versus all respondents.



Impact on Wellbeing

05

Resident Wellbeing & Emotional Connection

Overall Satisfaction & Quality of Life

88% agreed that they are satisfied with their life
23% felt their quality of life had increased in the last year, while **27%** felt this had decreased. The largest proportion (**50%**) selected 'neither/don't know'.

Optimism for the Future

72% of respondents agreed to some degree that they are excited for their future. Followed by **18%** selecting 'neither/don't know' and **10%** who are not optimistic for the future.

Connection with their local area

76% of respondents agreed that they feel strongly connected to their local area
&
44% agreed that having visitors around helps them feel more strongly connected to their area.

Feeling Calm & Relaxed

73% of respondents agreed that overall, they feel calm and relaxed
&
70% agreed that their local area is tranquil, peaceful and calm.

Feeling Safe in the Area

82% agreed they feel safe in their local area, followed by **10%** who disagreed with this statement, and **9%** who selected 'neither/don't know'.

Sense of Pride

77% of respondents agreed that they live in a beautiful area, with **10%** disagreeing with this, and **12%** selecting 'neither/don't know'.

**Combined percentages of all agreement/disagreement levels. Percentage totals may vary due to rounding.*

All Respondents. BASE=840

- Overall, respondents demonstrated a strong level of satisfaction and connection with their local area, alongside a sense of pride.
- And while findings may show that, for some, they don't feel like their quality of life has actively increased, results did highlight a strong optimism for the future. This optimism may be driven by hopes that that the UK economic situation and cost-of-living crisis will improve and therefore this will be an area that will be monitored in future waves of the survey to further track resident sentiment trends.

District Insights

- Respondents living in more rural areas such as East Herts (**90%**) and North Herts (**89%**) agreed more so with the statement 'I live in a beautiful area' compared to all respondents (**77%**), followed by those living in Three Rivers (**86%**) and in St Albans (**84%**), which has a strong heritage offering.

- In terms of having a connection with their local area, findings show a correlation between this, and the sense of pride mentioned above, with agreement being highest in Three Rivers (**86%**), St Albans and East Herts (both **83%**), compared to all respondents (**76%**). Whilst still positive, agreement was lower in Broxbourne (**62%**), Hertsmere (**63%**) and Welwyn Hatfield (**69%**).

- Looking at quality of life, respondents who live in East Herts were more likely to agree that their quality of life had increased versus all respondents (**28%** vs. **23%**), whilst this sentiment was lowest in both Welwyn Hatfield (**17%**) and Watford (**14%**).

- Findings also show that those living in Welwyn Hatfield (**61%**) and in Dacorum (**60%**) were most likely to report that their financial situation had worsened in the last year (versus all respondents **54%**).

Length of Residency

Respondents who have lived in their local area for under 5 years were more likely to agree that they live in a beautiful area (**91%**), alongside a higher proportion agreeing that their area is peaceful and calm (**86%**) and safe (**93%**), compared to all respondents.

A higher proportion of new residents also stated that their quality of life has increased in the last year (**31%**) vs. **23%** among all respondents.

Visitor Footfall & Resident Engagement

06

Visitor Footfall

- Respondents were asked if they had observed any changes in visitor footfall in their local area in the last year. Findings show that the majority selected 'neither/don't know' (**67%**), however this was followed by **30%** who felt that footfall had increased.
- This sentiment will be key in identifying tourism hotspots in the county, creating opportunities to promote lesser-known destinations and to encourage visitor dispersal.

The number of visitors in my local area has...

Decreased	Neither/Don't know	Increased
3%	67%	30%

Availability & Engagement

- Respondents were asked if they had observed any changes in the number of local attractions, leisure experiences and events/festivals available in the last year, with the largest proportion (**47%**) feeling these had increased, followed by **44%** selecting 'neither/don't know'.
- This sentiment could be influenced by the return of local events post pandemic, including larger events such as Standon Calling, Gin and Jazz, Pub in the Park and Beer Fest. Hatfield House also has a significant events programme, in addition to the Elton John concert hosted at Watford FC in 2022, and the rising popularity of outdoor cinemas at attractions across the county.
- **47%** of respondents indicated that the number of local attractions and leisure activities they have taken part in has increased in the last year.
- Overall, findings show that residents are starting to acknowledge tourism development locally, which in turn results in increased resident participation with local attractions, events and activities. Based on the high proportions of those selecting 'Don't know', there is a significant opportunity to raise awareness further.

The number of local attractions, leisure experiences and events/festivals available to visit has...

Decreased	Neither/Don't know	Increased
9%	44%	47%

The number of local attractions & leisure activities I have taken part in has...

Decreased	Neither/Don't know	Increased
15%	38%	47%

All Respondents. BASE=840

- Engagement with local cafes/shops was fairly split, with **45%** agreeing they use these more frequently when working from home, and **48%** disagreeing with this.
- Looking at engagement with outdoor green spaces, this was higher, with **67%** agreeing they access these more so when working from home. Although engagement with local amenities is strong, this difference in agreement could be due to factors including green spaces being free to access and beneficial to wellbeing, which is even more pertinent given the ongoing impact of the cost of living crisis.

When working from home, I use more local cafes and shops

Agree	Disagree
45%	48%

When working from home, I access outdoor green spaces for walks or cycling more frequently

Agree	Disagree
67%	23%

This difference in agreement could be due to factors including green spaces being **free to access** and being beneficial to **wellbeing**

Length of Residency & Area Type

- A higher proportion of newer residents specified they engage in a hybrid working style (**49%**), compared to **36%** among all respondents and were more likely to access outdoor and green spaces when working from home (**76%**).
- Respondents living in a city were more likely to agree that they use local cafes and shops more frequently when working from home (**60%**), likely due to having a wider choice of amenities in closer proximity, compared to more rural areas.

BASE=233

District & Area Type Insights

- When looking at changes in visitor footfall, respondents originating from Watford (**41%**) and East Herts (**35%**), were more likely to have observed an increase in footfall, compared to all respondents (**30%**). Agreement with this was lower among respondents from Welwyn Hatfield (**21%**).

- Consequently, this may be influenced by the use of Watford Junction train station by visitors to access Warner Bros. Studio Tour London – The Making of Harry Potter, alongside a developing leisure offer in the town centre and music events hosted at Watford Football Club. Looking at East Herts, this is home to several attractions popular with visitors including the Henry Moore Foundation and Lee Valley Regional Park.

- Respondents from East Herts were also more likely to agree that the availability to visit local attractions had increased compared to all respondents (**54%** vs. **47%**), which therefore may be a significant factor in observing increased footfall in the area. Whilst still positive, this level of agreement was slightly lower in Broxbourne (**37%**) and Hertsmere (**39%**).

- Respondents from both East Herts (**56%**) and Three Rivers (**53%**) were more likely to agree that participation with local attractions and facilities had increased in the last year compared to all respondents (**47%**).

- Findings for these questions were also analysed by location type, with results showing that those living in rural areas of the county were most likely to feel that both visitor footfall (**35%** vs. **30%**) and resident engagement with local attractions had increased (**52%** vs. **47%**) in the last year, compared to all respondents.

The number of visitors in my local area has increased in the last year	%
St. Albans	29%
Dacorum	28%
Three Rivers	33%
Watford	41%
Welwyn Hatfield	21%
Stevenage	30%
East Herts	35%
North Herts	28%
Hertsmere	32%
Broxbourne	28%
Hertfordshire	**30%**

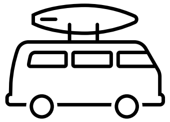
All Respondents. BASE=840

Resident Leisure Behaviour & Perceptions

07

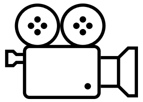
Resident Perceptions

- Findings highlight that a significant proportion of respondents (**44%**) perceive their local area as a tourist destination, which in turn may indicate appetite and interest in taking leisure trips within the county.
- Residents strongly acknowledge the strength of the film and TV offering in Hertfordshire, with **76%** of respondents agreeing with this.
- Respondents residing in St Albans (**74%**) and Watford (**62%**) were more likely than all respondents to view their local area as a tourist destination. Respondents from Dacorum (**90%**) and Watford (**83%**) were more likely to agree that Film/TV is a strength for the county.
- When looking at the county's tourism offering, respondents were most likely to perceive the countryside (**30%**) and museums/historic sites (**26%**) as the main attraction for visitors in their local area. This was followed by food & drink and film & TV related attractions/experiences, both selected by **14%** of respondents.



Do you consider your local area as a tourist destination?

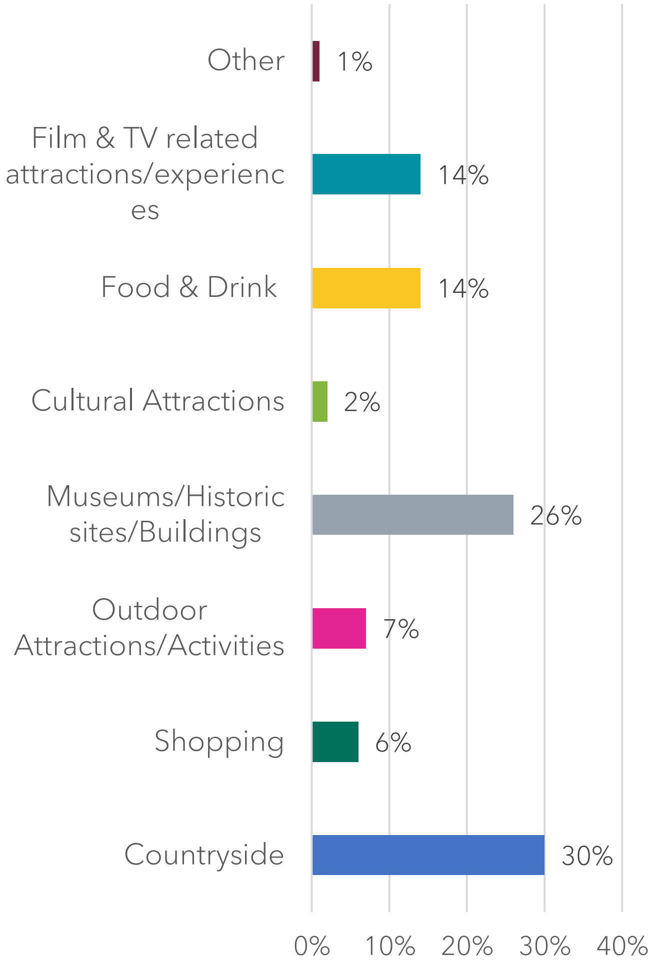
Yes	No
44%	56%



Do you consider film/TV productions to be a strength for Hertfordshire?

Yes	No	Unsure
76%	5%	19%

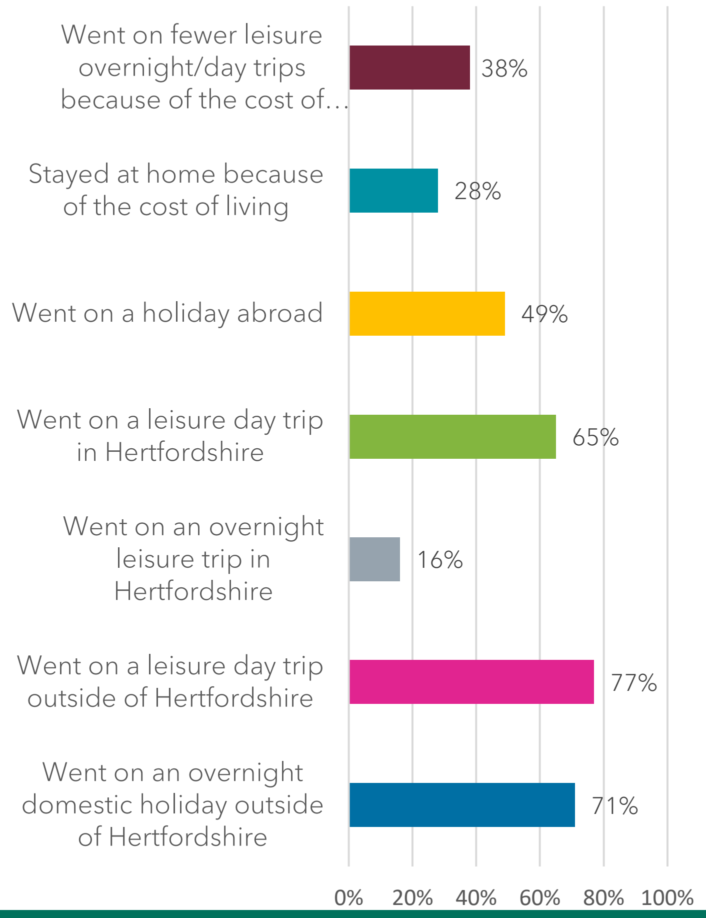
Please tell us what you think is the main attraction for visitors in your local area



All Respondents. BASE=840

Previous Leisure Trips

Looking back at the past year, please select all that apply



- The cost-of-living crisis has impacted, to a degree, the leisure behaviour of **66%** of Herts residents, which is similar to the sentiment we can observe at a national level.
- Whilst **49%** of all respondents went on holiday abroad, staycations are at good levels – above **70%**, confirming there is an appetite for domestic visitation. Visits outside of the county are strong and there is an opportunity to increase the number of day trips within Hertfordshire, which for the last year stood at **65%**.
- **16%** indicated that they have taken an overnight trip in Hertfordshire in the past year, highlighting the potential of also attracting a more local audience, with these visits mostly driven by celebrations, evening events, good offers/packages or quirky, more experiential accommodation provision.
- **72%** of Hertsmere residents took a day trip in Herts, followed by St Albans residents **(69%)**, with Watford and Three Rivers residents taking less day trips **(56%** and **59%** respectively**)**.
- Interestingly, the largest proportion of respondents taking an overnight trip in Hertfordshire were Watford residents **(23%)**, closely followed by those living in Broxbourne **(22%)**, Stevenage and East Herts **(21%** each**)**. A lower proportion of residents from Dacorum **(7%)** and Hertsmere **(9%)** took overnight trips in Hertfordshire in the last year.

Age

72% of 35-44s took a day trip in Herts

•••

21% of 18-34s took an overnight trip in Herts

•••

Smallest proportion of day and/or overnight trips taken by 65+

•••

59% of those aged 18-34 went abroad in the last year

Children

Those with children, particularly 0-11 years old, took a day trip in Herts (avg. **79%**)

•••

Those with children, particularly 0-4 years old, went on an overnight trip (avg. **23%**)

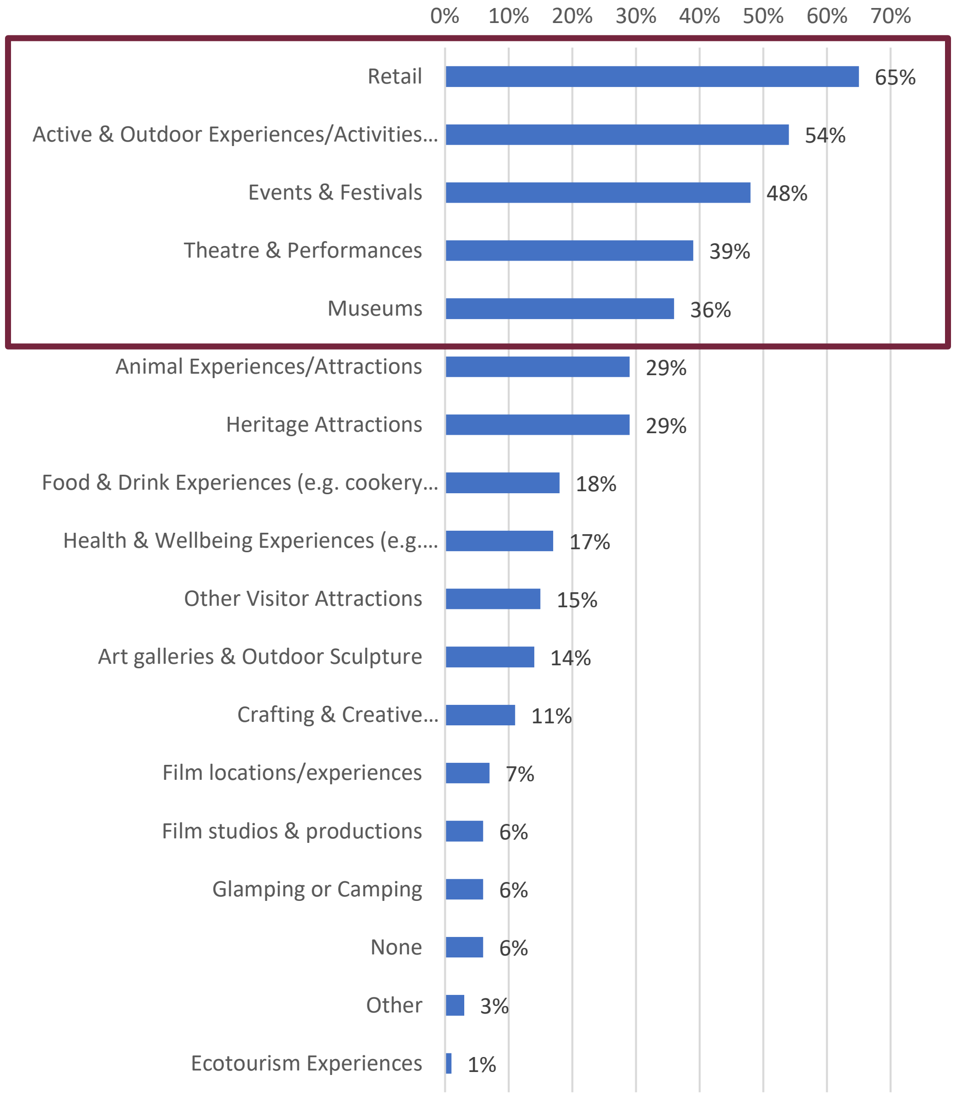
•••

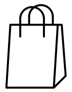
A bigger proportion of respondents with children stated that they have taken fewer leisure trips due to the cost-of-living crisis

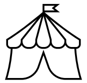
•••

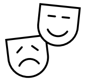
Those with children aged 5-11 years old **(53%)** and those without children **(51%)** were more likely to have gone on a trip abroad

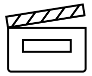
Looking back at the past year, please select all that apply. All Respondents. BASE=840











- Retail was the most selected activity residents took part in over the last year in Herts, as indicated by **65%** of all respondents. Research generally shows that people will try and shop more locally, only travelling further afield for more specific shopping destinations and outlets. As such, emphasis should be placed on ensuring the retail facilities in Hertfordshire are appealing, as shopping can lead to other secondary spend.

- Likely boosted by the pandemic as well, active and outdoors experiences/ activities are very popular in Herts, selected by more than half of the respondents. There is an opportunity to further develop and market these products given their wide appeal and their suitability as being 'all year round' activities that support residents' wellbeing. Events and festivals **(48%)** are another example of activity that residents engage with, no matter the season, strengthening community belonging and giving them new reasons to explore places on their doorstep.

- Another very popular activity was theatre and performances, selected by **39%** of respondents. Interestingly, film locations/experiences and film studios and productions did not attract as much visitation (**7%** and **6%** respectively). However, given that **76%** of residents believe that film/TV productions are a strength for Hertfordshire, further promoting the product and encouraging visitation among locals should be prioritised, as should raising awareness of the impacts screen tourism can have on a destination and the local economy.

Which of the following, if any, experiences or activities in Hertfordshire have you participated in this year? Please select all that apply. All Respondents. BASE=840

The top five activities are more or less the same regardless of the age groups, with some subtle differences in the order. Although not among the most popular activities, food and drink (27%) and visiting film locations (11%) were more prominent among 18-34 years old, compared to all respondents.

As expected, more differences can be picked up when looking at the results by respondents with children in the household.

No children		%
1	Retail	68%
2	Active and Outdoors	53%
3	Events and Festivals	46%
4	Theatre and Performances	38%
5	Museums	34%

0-2 years old		%
1	Retail	64%
2	Animal experiences/activities	64%
3	Active and Outdoors	56%
4	Museums	49%
5	Events and Festivals	48%

3-4 years old		%
1	Animal experiences/activities	66%
2	Retail	59%
3	Museums	56%
4	Events and Festivals	54%
5	Active and Outdoors	54%

5-11 years old		%
1	Retail	61%
2	Active and Outdoors	60%
3	Events and Festivals	54%
4	Animal experiences/activities	49%
5	Theatre and Performances	47%

12-18 years old		%
1	Retail	63%
2	Active and Outdoors	59%
3	Events and Festivals	50%
4	Theatre and Performances	39%
5	Heritage Attractions	28%

Theatre and performances were among the top activities/experiences for respondents with no children and families with older children.

•••

Animal experiences/activities have been popular among families with kids 0-11 years old, chosen as the top activity by those with kids between 3-4 years old (66%), compared to 29% of all respondents.

•••

Camping and glamping was a more popular option by those with kids aged between 5-11 years old (15% compared to 6% for all respondents).

•••

A higher proportion of respondents with children aged between 3-4 years old have selected heritage attractions compared to all respondents (36% vs 29%).

•••

Heritage attractions were in fact the fifth most visited among respondents with older children, aged between 12-18 years old. This category went on more visits to film studios and productions (11%) compared to the all-respondent average (6%).

Which of the following, if any, experiences or activities in Hertfordshire have you participated in this year? Please select all that apply. All Respondents. BASE=840

VFR Visits

- A significant proportion of respondents had visiting friends and relatives (VFR) to stay for leisure purposes in the last year, demonstrating a strong opportunity to target this market and integrate messaging into content aimed at the hyper-local audience.
- Respondents from East Herts (**54%**) & St Albans (**50%**) were more likely to have had VFR visits, while this was lower for Stevenage (**30%**) & Broxbourne (**31%**). Those from St Albans and East Herts also exhibited higher levels of pride in place, which may influence VFR visits. Respondents with younger children aged 0-2 (**49%**) & 3-4 yrs. (**54%**) were more likely to have had VRF visits. This was also higher among those aged 65+ (**49%**) and lower among those aged 18-34 (**36%**).
- The survey then asked – Based on your experience as a visitor within Hertfordshire, for a day trip or a short-break, when showing friends and relatives around Hertfordshire, where would you take them or what would you recommend that they do?
- Findings show that heritage attractions emerged strongly, as did outdoor ones, including parks, walking & cycling and activities. Responses captured the strong appeal of Warner Bros. Studio Tour London - The Making of Harry Potter, alongside animal attractions such as Willows Activity Farm & Paradise Wildlife Park.
- This highlights the county's strengths in terms of its tourism offering, and what residents look for, prioritise and recommend. It will be key in helping to curate marketing content to the hyper-local audience.

Have you had any friends and relatives to stay with you in the last year for leisure purposes?

Yes	No
42%	58%

Destinations

St. Albans, Hitchin, Hertford, Tring, Watford, Welwyn, Berkhamsted, Ware, Stevenage & Historic market towns

Heritage

St. Albans Cathedral, Hatfield House, Knebworth House, Verulamium Museum, Roman Museum, Tring Museum, Ashridge House & National Trust

Film, Arts & Culture

Warner Bros. Studio Tour London - The Making of Harry Potter & The Henry Moore Foundation

Active & Outdoors

Countryside, Nature, Parks, Lakes, Walking & Cycling, Lee Valley Regional Park, Cassiobury Park, Ashridge Estate, Hitchin Lavender Fields, The Snow Centre

Animal Attractions

Paradise Wildlife Park
Willows Activity Farm
Zoos

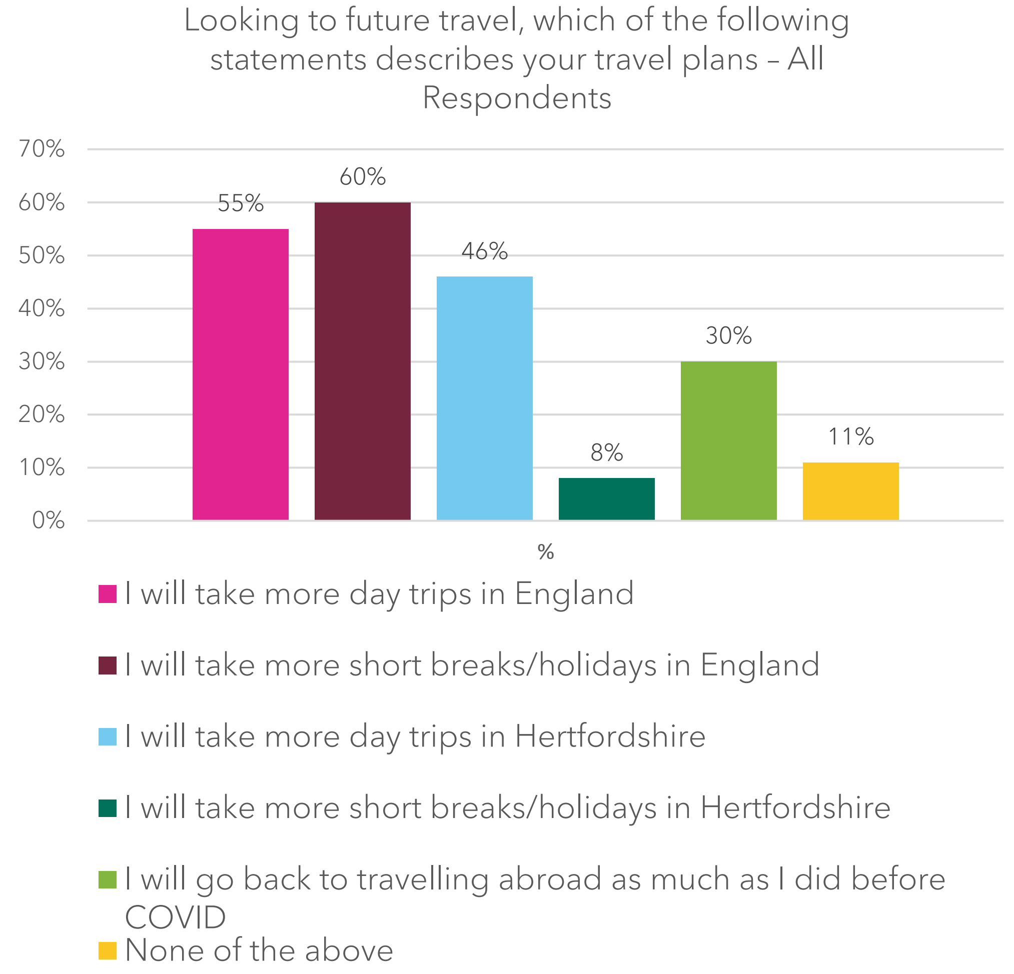
Food & Drink

Local Pubs
Restaurants

All Respondents. BASE=840

Future Leisure Trips

- Looking at future travel, findings demonstrate a strong appetite for taking more day trips and short breaks in England, as well as in Hertfordshire.
- **46%** of all respondents specified they intend to take more day trips within the county and **8%** more short breaks/holidays within Hertfordshire.
- **30%** stated that they will go back to travelling abroad as much as they did prior to the pandemic. Together, these insights support the growing trend in taking trips closer to home, which is potentially driven by the impact of the cost-of-living crisis on household finances.
- Findings also support VisitEngland's consumer sentiment tracker findings, which shows that the top reason why consumers will look to take more trips domestically is because UK holidays are easier to plan than going abroad.
- Interest in taking more overnight stays in Hertfordshire was higher among respondents from Stevenage (**12%)** and Three Rivers, North Herts and Broxbourne (all **10%**). When it comes to day trips, intent was higher among those originating from Broxbourne (**57%**) alongside Stevenage and Hertsmere (both **54%**).
- Respondents aged 18-34 were **+6%** more likely to state they will take more overnight leisure trips in Hertfordshire, while intention to take more day trips was slightly higher among those aged 35-64. Alongside this, appetite to take more trips in general in the county was higher among respondent groups with children aged up to 11 years.

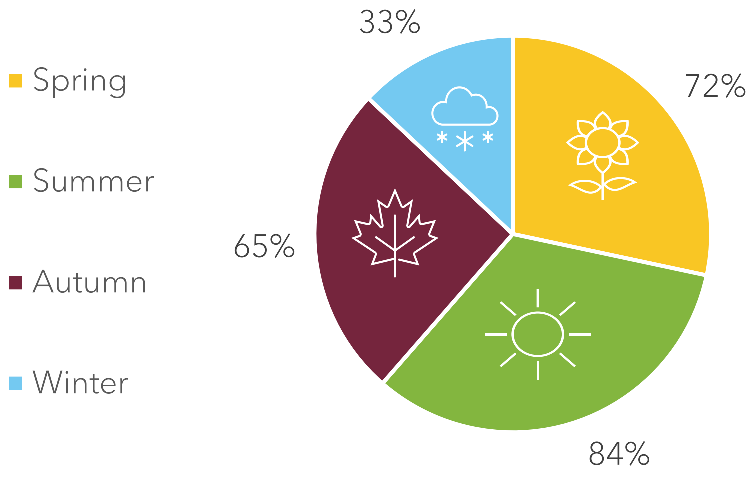


Looking to future travel, which of the following statements describes your travel plans – All Respondents. BASE=840

Seasonality

- Looking at the time of year that respondents would be likely to visit somewhere in Hertfordshire for a day trip or overnight stay, findings show that Spring and Summer were most popular, likely to be driven by better weather and the school holidays. However, results do still demonstrate interest in trips off-season, with 65% selecting Autumn and 33% for Winter.
- Respondent groups with children up to the age of 11 were more likely to state they would visit in the Summer season, which is highly likely to be driven by the school holidays. While those without children displayed a higher interest in visits in the Spring and Autumn.
- In terms of age, respondents aged 55+ were more likely to want to visit Hertfordshire in the off-season, whereas those aged 18-34 were less likely to display a desire to visit in the winter season in particular (22% vs. 33%).

At what time(s) of year would you be most likely to visit somewhere in Hertfordshire in the future for a day trip or overnight stay? Please select all that apply. – All Respondents



Overall, intention to visit Hertfordshire is highest in the Summer and Spring, followed by the Autumn.

And while interest in Winter visitation is promising, findings do highlight an opportunity to encourage visits further in the off-season.

At what time(s) of year would you be most likely to visit somewhere in Hertfordshire in the future for a day trip or overnight stay? Please select all that apply. – All Respondents. BASE=840

Sources of Information

- To effectively target the hyper-local audience, the survey asked respondents which sources of information they would use to plan a future day trip or overnight stay within the county.
- The top three resources included specific attraction websites, recommendations from friends & family and Hertfordshire destination websites, followed by review websites such as TripAdvisor and recommendations on social media.

- When looking at differences in responses by age and children in the household –

✓ Review websites – Higher among 18–34-year-olds (**61%**) & those with children aged 5-11 yrs. (**59%**)

✓ Recommendations on social media - Higher among those aged 18-34 (**46%**) and those with younger children (0-2 yrs. **45%**, 3-4 yrs. **49%** & 5-11 yrs. **47%**)

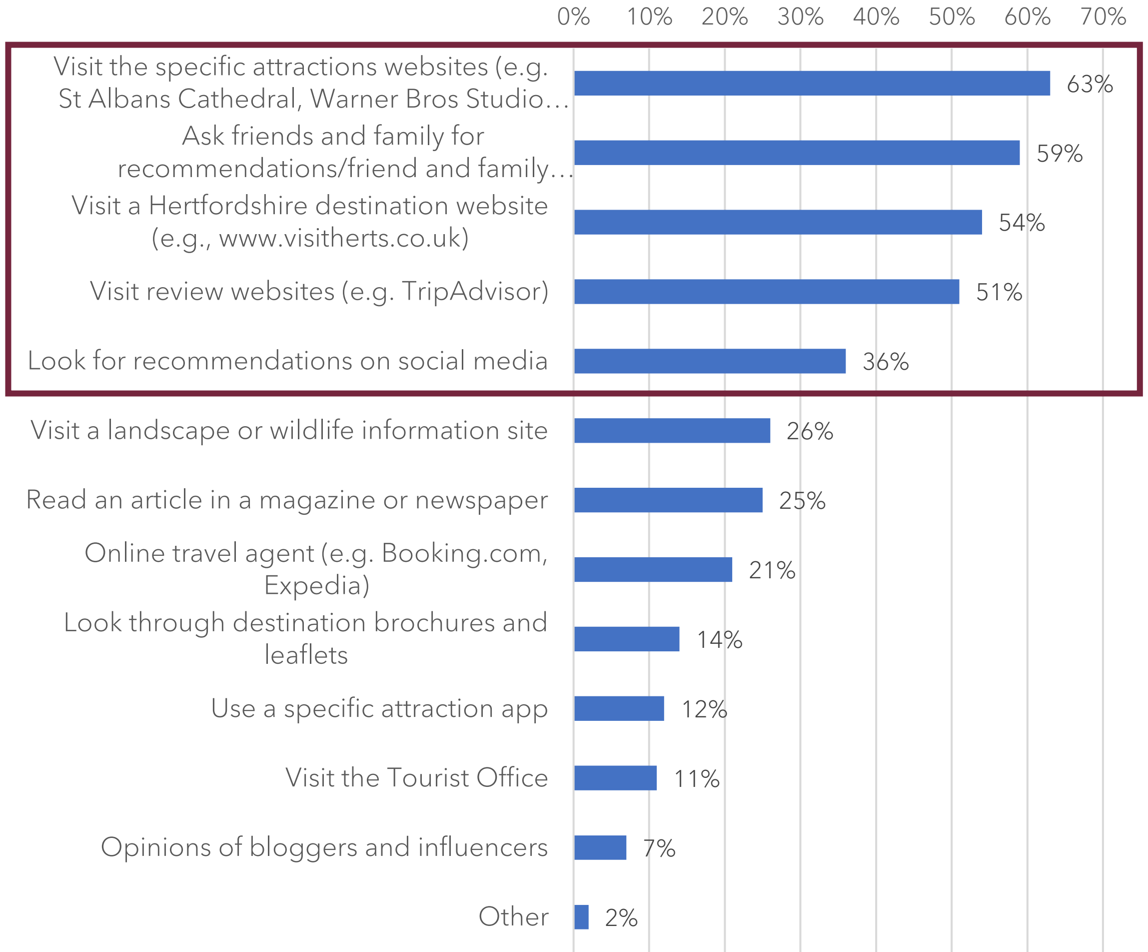
✓ Bloggers & influencers - Higher among those aged 18-34 (**18%**) and those with young children (0-2 yrs. **15%** & 3-4 yrs. **17%**)

✓ Specific attraction websites - Higher among those aged 45-54 yrs. (**74%**)

✓ Destination websites - Higher among those aged 55-64 yrs. (**67%**)

✓ Magazines & Articles & Destination brochures - Higher among those aged 65+ (**38% & 53%** respectively)

If you were planning a future day trip or overnight stay in Hertfordshire to explore your local area further, which of these resources would you be likely to use to plan your visit? – All Respondents



If you were planning a future day trip or overnight stay in Hertfordshire to explore your local area further, which of these resources would you be likely to use to plan your visit? – All Respondents. BASE=840

Overall Support & Impacts of Tourism

08

Overall Support of Tourism

- A significant proportion of respondents **(61%)** stated that the overall impact of tourism on Hertfordshire is positive, with only **2%** selecting 'negative' and the remaining **37%** selecting 'don't know/neutral'.
- Overall, this demonstrates a strong sense of support for tourism activity in the county and that tourism can be a mechanism for improvement and development, as illustrated in the impacts and benefits section of the report. However, moving forward this sentiment will continue to be monitored in future annual surveys.

Overall impact of tourism on Hertfordshire?

Positive	Negative	Don't Know/Neutral
61%	**2%**	**37%**

District Insights

- Given the maturity of the tourism offer in St Albans, respondents living in the district were more likely than all respondents to feel the overall impact of tourism on Hertfordshire is positive (**72%**), followed by North Herts & Three Rivers (both **66%**).

- Whilst still positive, the percentage of respondents that felt the impact of tourism was positive was **10%** lower for those living in Hertsmere & Welwyn Hatfield (both **51%**), followed by respondents from Broxbourne (**53%**), with respondents from these areas also exhibiting a slightly lower level of pride in place compared to all respondents.

Overall, do you feel the impact of tourism on Hertfordshire is? All Respondents. BASE=840

Top Positive & Negative Impacts

Respondents were asked to specify the top three positive and negative impacts of tourism on their local area. The following diagrams illustrate the most frequently mentioned words, indicated by the size of the words displayed.

Positive

- Findings strongly reinforce previous sentiment expressed by respondents that tourism can help to create job opportunities locally and contribute to the local economy, bringing money to the area, through visitor spending.
- Responses also captured respondents' acknowledgement that tourism can improve the area by being a catalyst for inward investment and improve local infrastructure and facilities.
- As shown in the word cloud, frequently mentioned positive impacts also included tourism's role in keeping the area busy, whilst also increasing awareness of the destination.
- Consequently, this then helps to facilitate and preserve local attractions, hospitality venues, shops, events and other amenities that locals can enjoy also.

Negative

- Looking at the negative impacts of tourism activity, top responses included its influence on parking, with many respondents citing that it makes it harder to find appropriate parking, as certain areas can be busy. Impact on public transport is also noted.

- This was then followed by concerns around litter and pollution, with additional mentions of damage to the countryside and wildlife, demonstrating the importance of sustainable initiatives and activities, and the significance of effectively communicating this to local communities.

- Respondents also expressed concerns around excessive traffic and congested roads, which is likely due to residents also being apprehensive about overcrowding and certain areas being too busy.

- Finally, responses captured trepidations around increases in local prices generated by tourism activity, with mentions of increasing house prices and things being increasingly more expensive, which is also likely a knock-on effect of the cost-of-living crisis.

Additional Comments

Finally, the survey gave respondents the opportunity to leave any additional comments they might have about the impact of tourism on their local area, or regarding any of the answers they gave throughout the survey. The following diagram presents a sample of comments given.

"We need to encourage tourists but offer value for locals. i.e., free/ discounted parking for locals, early bird tickets for locals"

"Tourism is essential for the local economy. But it needs to be balanced with the requirements of local residents"

"Would like to see improvement in advertising events often miss lots happening in the area"

"Tourism can be very positive but must invested in, monitored continuously and encouraged carefully"

"I think its fundamentally a good thing, I just wish people would take more care!"

"Tourism is really important, but it needs to be managed properly and there needs to be appropriate infrastructure in place. The opinion of residents is also vital, as any increase in tourism will potentially impact lives and lifestyles"

"I think there should be more things to do for older people. Most activities are based around families or children"

"Lack of bus infrastructure that runs more often and connects more places and reduction of trains and their timetable puts more cars on the road and put visitors off by the inconvenience and curtailed visiting hours"

"More investment in town centre shops would draw visitors"

"The lack of cross county transport makes it almost impossible to travel without a car. So, visitors to us need to either drive or be driven"

"If you want more people to visit, make it more affordable & practical to do so. Making parking less of a nightmare. Make public transport reliable & affordable. Make walking possible - install more benches, safe walking paths and areas".

"I cannot stress enough, look after our green spaces & wildlife, then everyone else will thrive"

"On the whole I think Hertfordshire is a great county with a lot to offer people of all ages"

"Tourism is good, but the local infrastructure and amenities must be put in place to cope with the increase in people/cars etc"

"Overall, I second tourism in my area because of the cultural and economic boost that it brings"

Do you have any additional comments about the impact of tourism in Hertfordshire? BASE=361

Key Findings & Recommendations

09

The following outlines a summary of findings by age and those with children in the household, where responses show a meaningful difference compared to all respondents, to help further develop local audience insights and inform effective targeting and content creation.

Age

18-34

- ✓Stronger interest in overnight stays in the county.
- ✓Look mostly for Summer and Spring leisure visits.
- ✓Interested in retail, active & outdoor activities, events & festivals, animal attractions & museums.
- ✓High interest in food & drink experiences and Film & TV locations.
- ✓More likely to look to review websites, recommendations on social media and bloggers and influencers as sources of information.

35-44

- ✓Strong interest in leisure day trips within the county.
- ✓Most likely to take future trips in Summer and Spring - with this being particularly high for Summer perhaps due to the school holidays.
- ✓Interested in retail, events & festivals, active & outdoor activities, animal attractions and theatre and performances.

45-54

- ✓Strong interest in day and overnight trips to the county - particularly for day trips in the future.
- ✓Most likely to take future trips in Summer and Spring closely followed by Autumn.
- ✓Interested in retail, active & outdoor activities, events & festivals, theatre and performances and museums.
- ✓More likely than all respondents to look at specific attraction websites as a source of information when planning leisure trips within the county.

55-64

- ✓Strong intent to take more day trips in the county.
- ✓Interest in trips strong for Autumn and Spring, while also being higher than all respondents for the Winter season.
- ✓Interested in retail, active & outdoor activities, events & festivals, theatre and performances and museums & heritage attractions.
- ✓More likely than all respondents to visit destination websites as a source of information.

65+

- ✓While previous visitation was lower, strong interest in taking future trips.
- ✓Most likely to have had VFR - perhaps due to visits from family & grandchildren.
- ✓Most likely to visit in Spring & Summer, with stronger interest in visits in Spring & Autumn compared to other age groups.
- ✓Interested in retail, active & outdoor activities, theatre & performances, museums & events & festivals.
- ✓More likely to look to magazines & articles & destination brochures.

Children in the household

No Children

- ✓More likely to have gone abroad in the last year.
- ✓Previous visitation to Herts for day/overnight trip slightly lower compared to all respondents - opportunity to promote more activities/trips that appeal to non-families.
- ✓Less likely to have taken fewer trips due to the cost-of-living crisis and less likely to have reported that their financial situation has decreased.
- ✓More likely to look at destination websites as a source of information.

Aged 0-2 yrs.

- ✓More likely to have taken an overnight/day trip in Herts & less likely to have taken a trip overseas.
- ✓Appetite to take more day/overnight trips in Herts was higher – particularly for overnight stays.
- ✓More likely to have taken fewer trips due to the cost-of-living crisis.
- ✓More likely to have had VFR in the last year & to report their financial situation had worsened.
- ✓Skew towards Summer for future trips.
- ✓Look for animal experiences & museums
- ✓Likely to look for recommendations on social media & bloggers & influencers.

Aged 3-4 yrs.

- ✓More likely to have taken an overnight/day trip in Herts – particularly day trips & least likely group to have taken a trip overseas.
- ✓Appetite to take more day/overnight trips in Herts was higher – particularly for day trips within the county.
- ✓More likely to have taken fewer trips due to the cost-of-living crisis.
- ✓Most likely to have had VFR in the last year & to report their financial situation had worsened.
- ✓Skew towards Summer for future trips.
- ✓Most likely groups to look for animal attractions.
- ✓More likely to look for museums, heritage attractions, camping & glamping and events & festivals.
- ✓Likely to look for recommendations on social media & bloggers & influencers.

Aged 5-11 yrs.

- ✓Strong appetite to take more day trips in the next year within the county, with previous day trip visitation also being high.
- ✓Also, more likely to have taken fewer trips due to the cost-of-living crisis and slightly more likely to have reported that their financial situation has decreased in the last year.
- ✓Strong interest in trips during Summer
- ✓More likely to be interested in active & outdoor experiences, animal attractions & theatre & performances, alongside camping and glamping.
- ✓Likely to use review websites, specific attraction websites and recommendations on social media.

Aged 12-18 yrs.

- ✓More interested in visits to film studios and productions than all respondents
- ✓More likely to look to destination websites, review websites and recommendations on social media than all respondents
- ✓Also, more likely than those without children to have been affected by the cost-of-living crisis.

Action Areas & Key Recommendations

Based on the learnings and insights from this research, we would recommend focus being placed on the following action areas:

Benefits of Tourism

- Hertfordshire residents acknowledge the overall benefits of tourism locally, with very high percentages of respondents indicating that tourism increases employment opportunities, improves the local economy, as well as the local investment, development and infrastructure spending in the economy. However, there have been several questions to which residents selected ‘neither agree nor disagree’ or ‘don’t know’, which clearly shows that some are not that aware of the value of the local visitor economy, of what’s there to explore locally and of the links between tourism, place, developments and communities.

- In order to become proud supporters of their county, residents need to be made aware of future development and regeneration projects, and the direct benefits these will have on the local communities should be effectively communicated. We will monitor agreement with these statements in future waves, to ensure we maintain or improve these perceptions.

Parking & Transport

- Parking, traffic and transport in general are issues highlighted as top negative impacts of tourism. While some districts are more affected than others, with the county being better connected to London and the Midlands, but less so from East to West, it is important, where possible, to promote the use of public transport for leisure, especially in areas with good connections, to ease the pressure on parking facilities and on the congested roads. Offers and messages around sustainability are good ways of encouraging more public transport use, but any information provided needs to be accurate and communicated clearly.

- Interestingly, results indicate that to an extent, the transport issues are only in part due to tourism, as only 10% of respondents feel that there are too many visitors in their local area. The negative feedback related to parking is also directly related to the low scores around public transport in general. Residents also highlight the need for transport infrastructure investment and the need for better public transport solutions have been flagged in the open-ended impact question, which should be fed into relevant consultations and local authority teams.

Sustainability

- Hertfordshire residents are generally aware of both the negative and positive impacts tourism can have on the environment, sentiment apparent not only in their rating of various statements, but also in their spontaneous feedback and additional comments. The increasing awareness of sustainability among people and places is determining more and more destinations to ramp up their sustainability efforts.

- In order for Hertfordshire to be a great place to live, study, invest and visit, there is a need to put mechanisms in place to manage the visitor economy and to educate residents and visitors to reduce their impacts. The perception around Herts being a year-round destination is growing, so there is a need to continue to share this message and to ensure a strong off-season visitor offer is put in place. This in turn can support visitor dispersal efforts and create a more sustainable local economy. This could also relieve pressures on environmentally sensitive places such as Ashridge Estate, which are trying to deter visitors altogether, due to the impact high footfall is having on the landscape. Furthermore, Visit Herts can help support businesses and destinations to help manage and promote visitor dispersal plans.

- Residents who live in districts that are home to established nature attractions and landscapes agree to a larger degree that tourism protects the environment, mostly also due to them seeing that these assets are being managed to minimise negative impacts. These impacts will be monitored in future waves as we work towards minimising tourism’s negative impacts on nature.

Pride in Place

- Overall, respondents demonstrated a strong sense of pride in place and satisfaction with their local area, particularly in more rural areas, alongside market towns and destinations with a strong heritage offering. This highlights the strength and appeal of the county's countryside, nature and historic offering, which were also key influencers on residents’ decision to take leisure trips locally, as identified in the Hertfordshire Consumer Product Testing Survey, carried out as part of the Herts, Camera, Action project.

- The positive findings around residents feeling connected to their local areas and the overall sentiment that they live in a beautiful place also highlight an opportunity to further support inward investment and attract skilled workers to the county and through a joined-up approach to place marketing. Messages related to residents feeling safe and content can also be used as hooks to attract students to the area.

Cost of Living

- As expected, the national cost of living crisis has impacted Hertfordshire residents also, with the majority of respondents stating that they have been negatively impacted in the last year. As such, conveying a value for money message to the hyper-local audience will be very important in securing visits, positive recommendations, as well as their support for their local businesses.
- This messaging will be particularly pertinent to the family market, and overall marketing content should be tailored to various audiences and demographics and should incorporate information on offers and great activities such as events and experiences that residents can do locally. Consequently, Visit Herts will look to provide businesses with support on how to effectively communicate with key audiences and share relevant messaging.

Hybrid Working & Engagement with Local Spaces

- Results demonstrate the growing adoption of hybrid working measures among residents, particularly following the pandemic. Of those that work from home to a degree, a significant proportion are more likely to engage with local cafes/shops and outdoor green spaces for walking and cycling.
- This increased engagement not only benefits businesses and the local visitor economy, but the use of green spaces also contributes significantly towards improving resident wellbeing and their connection to the local area. Therefore, it will be important to promote outdoor green spaces within residents' locality, whilst also focusing on ensuring that the availability and awareness of these are sufficient in more urban areas.

VFR & Future Trips

- Intention to take future trips domestically and to Herts is strong, supporting the wider staycation trend. According to VisitEngland's Consumer Sentiment Tracker, the main reason why people prefer a domestic trip is because it is easier to plan, followed by the cost of living impact, making trips closer to home more appealing, so it is important to communicate why Herts is a great short break option.
- For maximum impact, marketing comms need to be targeted, to reach the different age groups and life stages, as shown in the summaries on pages 36 and 37. Although residents will not be our biggest market for overnight trips, we will continue to inspire them to turn some of those day trips into overnight stays. Events, festivals, experiences and unique accommodation options can contribute to this, so it is important to create and promote these leisure products.
- Increasing residents' leisure visitation locally and their satisfaction, leads to increasing their pride in place and turns them into ambassadors for the county. This also positively impacts the quality and number of Visiting Friends and Relatives (VFR) visits. Given that 42% of respondents indicated they have had friends and relatives stay with them in the last year shows how important this market can be.

Sources of Information

- The preferred sources of information residents go to when planning a trip are also different by age and life stage. The top choices are digital, emphasizing the need to ensure good visibility of our websites and social media channels. Review websites are also favoured, so it is very important that visitor economy businesses monitor these reviews/communication channels.

- It is worth noting that the second most used source of information is 'recommendations from friends and family'. This further emphasizes the importance of inspiring our residents to visit locally, raising awareness of what there is to see and do in the county, and ensuring they receive targeted and tailored marketing comms. Resident-focussed campaigns, such as the Herts Big Weekend, are a fantastic tool to enthuse residents to explore what's on their doorstep, and to then recommend these attractions they discovered or re-discovered to their friends and family.

Developing Film/TV & Food

- In terms of future product development, results confirm that screen tourism is a key strength for the county, as also highlighted in the Hertfordshire Consumer Product Testing Survey, with its potential strongly acknowledged by residents and this being a USP for the destination.

- However, results do demonstrate that this may not yet translate into actual visitation and therefore, further promotion and encouragement to visit film/TV attractions and experiences among locals and their visiting friends and relatives should be prioritised. Furthermore, there is also an opportunity to utilise this offering as a secondary role to give additional interest to more traditional tourism activities as part of a wider leisure visit, alongside working with the Hertfordshire Film Office to capitalise on post-production opportunities around new releases.

- Results also highlighted an opportunity to further develop the food and drink offering within the county, by working to increase its promotion and uptake of Hertfordshire local produce by showcasing it and celebrating producers. This should also include consideration for further support to improve connections between producers and businesses, through stronger supply chains, working to align with sustainability goals including reducing food miles.

Newer Residents

- Findings strongly demonstrate that perceptions among respondents who have moved to Hertfordshire within the last five years are more positive around certain aspects. This includes a favourable view towards tourism's ability to attract and implement local investment and infrastructure, alongside an increased sense of pride and quality of life.
- Newer residents are also more likely to have had VFR visits, and a higher percentage work for organisations that have adopted hybrid working measures and are more likely to engage with open green spaces when working from home.
- Consequently, communicating these insights to prospective residents will be key, helping to further position Hertfordshire as an attractive destination to live and work in, contributing to alleviating the county's tight labour market, and supporting the local economy.

Overall Impact

- The majority of respondents agreed that the impact of tourism was positive, however like benefits of tourism, over one third of respondents selected 'neutral' or 'don't know', indicating the need to further increase awareness of tourism activity and the benefits within the destination.
- Although as a whole Hertfordshire has lower levels of deprivation than the national average, areas with pockets of deprivation exhibited a lower sense of pride in place and connection with their local areas, being also less likely to acknowledge the positive impact of tourism activity. However, they also recognised the substantial development and regeneration activity within these areas, which will be a key catalyst for improving perceptions around pride in place and quality of life. In contrast, sentiment among residents in areas with a more mature and established tourism offering, were stronger in terms of these aspects.
- Overall, there is an opportunity to further increase awareness of the benefits of the visitor economy, whilst working to develop the tourism offer further, particularly around screen tourism and local produce. These developments will further benefit local communities and place making and build upon residents' perceptions of tourism as a key mechanism for positive change.

Appendices

10

Data Tables – All Respondents

	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	BASE
Tourism preserves historic buildings and monuments	29%	45%	20%	4%	1%	0%	0%	840
Tourism increases demand for local historical and cultural attractions	31%	50%	13%	4%	1%	1%	0%	840
Tourism increases availability of local recreation facilities/opportunities	14%	42%	23%	13%	5%	2%	0%	840
Tourism is harmful to natural places like the countryside	3%	8%	39%	20%	17%	11%	2%	840
Tourism limits parking spaces available to local people	8%	26%	34%	17%	8%	6%	1%	840
There are too many visitors in my local area	2%	3%	5%	26%	21%	35%	8%	840
I like to meet visitors to my local area	7%	29%	22%	34%	5%	4%	0%	840
Tourism protects and enhances the natural environment	3%	15%	25%	35%	17%	3%	1%	840
	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	BASE
Tourism increases employment opportunities	27%	45%	19%	6%	2%	0%	0%	840
Tourism improves the local economy	30%	47%	19%	3%	1%	0%	0%	840
Tourism improves local investment, development and infrastructure spending in the economy	16%	42%	25%	14%	2%	1%	0%	840
Tourism increases prices for local services and amenities	6%	19%	27%	36%	8%	5%	0%	840
Tourism reduces my ability to access local services and facilities	3%	6%	12%	36%	22%	18%	3%	840
Local infrastructure is improving (e.g., public toilets, car parks, playgrounds, footpaths, cycle paths)	8%	22%	22%	25%	13%	7%	3%	840
Local transport services are improving	4%	9%	13%	35%	16%	17%	6%	840

	Strongly Agree	Agree	Somewhat Agree	Neither Agree Nor Disagree	Somewhat Disagree	Disagree	Strongly Disagree	BASE
Overall, I am very satisfied with my life	19%	50%	19%	7%	3%	2%	0%	840
Overall, I feel very excited about my future	13%	35%	24%	18%	6%	3%	1%	840
Overall, I feel calm and relaxed	12%	35%	26%	14%	10%	2%	1%	840
Having visitors around helps me feel more strongly connected to my local area	5%	20%	19%	38%	8%	9%	2%	840
I feel safe in my local area	11%	43%	28%	9%	7%	2%	1%	840
My local area is tranquil, peaceful and calm	7%	28%	35%	13%	11%	5%	0%	840
I live in a beautiful area	19%	33%	25%	12%	7%	3%	0%	840
I feel strongly connected to my local area	14%	36%	26%	15%	5%	3%	1%	840

	Increased a lot	Increased a little	Neither/Don't know	Reduced a little	Reduced a lot	BASE
The number of visitors in my local area has...	7%	23%	67%	3%	0%	840
The number of local attractions, leisure experiences and events/festivals available to visit has…	7%	40%	44%	7%	2%	840
The quality of life for residents has…	2%	21%	50%	22%	5%	840
The number of local attractions and leisure activities I have taken part in/visited has…	4%	43%	38%	12%	3%	840

Looking back at the past year, please select all that apply.	%	BASE
Went on an overnight domestic holiday outside of Hertfordshire	71%	840
Went on a leisure day trip outside of Hertfordshire	77%	840
Went on an overnight leisure trip in Hertfordshire	16%	840
Went on a leisure day trip in Hertfordshire	65%	840
Went on a holiday abroad	49%	840
Stayed at home because of the cost of living	28%	840
Went on fewer leisure overnight/day trips because of the cost of living	38%	840
Other	2%	840
Which of the following, if any, experiences or activities in Hertfordshire have you participated in this year? Please select all that apply	**%**	**BASE**
Retail	65%	840
Active & Outdoor Experiences/Activities (e.g., walking, cycling and guided tours)	54%	840
Events & Festivals	48%	840
Theatre & Performances	39%	840
Museums	36%	840
Animal Experiences/Attractions	29%	840
Heritage Attractions	29%	840
Food & Drink Experiences (e.g., cookery classes and foraging)	18%	840
Health & Wellbeing Experiences (e.g., spas and retreats)	17%	840
Other Visitor Attractions	15%	840
Art galleries & Outdoor Sculpture	14%	840
Crafting & Creative Experiences/workshops	11%	840
Film locations/experiences	7%	840
Film studios & productions	6%	840
Glamping or Camping	6%	840
None	6%	840
Other	3%	840
Ecotourism Experiences	1%	840

Looking to future travel, which of the following statements describes your travel plans for the next year? Please select all that apply	%	BASE
I will take more day trips in England	55%	840
I will take more short breaks/holidays in England	60%	840
I will take more day trips in Hertfordshire	46%	840
I will take more short breaks/holidays in Hertfordshire	8%	840
I will go back to travelling abroad as much as I did before COVID	30%	840
None of the above	11%	840
At what time(s) of year would you be most likely to visit somewhere in Hertfordshire in the future for a day trip or overnight stay? Please select all that apply.	%	BASE
Spring	72%	398
Summer	84%	398
Autumn	65%	398
Winter	33%	398
If you were planning a future day trip or overnight stay in Hertfordshire to explore your local area further, which of these resources would you be likely to use to plan your visit?	%	BASE
Visit the specific attractions websites (e.g., St Albans Cathedral, Warner Bros Studio The Making of Harry Potter etc.)	63%	840
Ask friends and family for recommendations/friend and family made recommendations	59%	840
Visit a Hertfordshire destination website (e.g., www.visitherts.co.uk)	54%	840
Visit review websites (e.g., TripAdvisor)	51%	840
Look for recommendations on social media	36%	840
Visit a landscape or wildlife information site	26%	840
Read an article in a magazine or newspaper	25%	840
Online travel agent (e.g., Booking.com, Expedia)	21%	840
Look through destination brochures and leaflets	14%	840
Use a specific attraction app	12%	840
Visit the Tourist Office	11%	840
Opinions of bloggers and influencers	7%	840
Other	2%	840

Looking at the following statements, which one best describes your working patterns considering the COVID-19 pandemic?	%	BASE
I have always travelled to work, and I have continued to do so over the pandemic	44%	840
I have always worked from home	8%	840
Since the pandemic, my organisation introduced working from home measures, but I have now returned to the workplace full-time	6%	840
Since the pandemic, my organisation introduced working from home and hybrid measures that are continuing, and this is now combined with days at the workplace	29%	840
Prior to the pandemic, I had already began working in a more hybrid way (for example working from home on certain days)	7%	840
Other	6%	840
When working from home, I use more local cafes and shops.	%	BASE
Strongly agree	10%	233
Agree	15%	233
Somewhat agree	20%	233
Neither agree nor disagree	7%	233
Somewhat disagree	7%	233
Disagree	24%	233
Strongly disagree	17%	233
When working from home, I access outdoor green spaces for walks or cycling more frequently.	%	BASE
Strongly agree	22%	233
Agree	30%	233
Somewhat agree	15%	233
Neither agree nor disagree	10%	233
Somewhat disagree	5%	233
Disagree	12%	233
Strongly disagree	6%	233

Images

Page Number	Image location	Image Source/Credit
1	1 - St Albans Cathedral 2 – Welwyn 3 – Stevenage 4 – Harpenden 5 – Knebworth House 6 – Wheathampstead	1 – Canva Pro Stock Image 2 – Visit Herts 3 - Visit Herts 4 - Visit Herts 5 - Canva Pro Stock Image 6 - Visit Herts
2	Digswell Viaduct Welwyn	Visit Herts
3	Berkhamsted Dacorum	Visit Herts
8	Watford	Visit Herts
9	Berkhamsted	Visit Herts
10	Ware	Visit Herts
12	Harpenden	Visit Herts
14	Watford	Visit Herts
17	St Albans	Visit Herts
19	Redbourn	Canva Pro Stock Image
20	Hemel Hempstead Dacorum	Visit Herts
21	Knebworth House	Visit Herts
26	1 – St Albans Cathedral 2 – Knebworth House 3 – Henry Moore Studios & Gardens 4 – Tring Park 5 – Paradise Wildlife Park 6 – Puddingstone Distillery	1 – Visit Herts 2 - Visit Herts 3 – Nigel Moore 4 - Visit Herts 5 - Paradise Wildlife Park 6 – Visit Herts
30	Stevenage	Visit Herts
31	St Albans	Visit Herts
35	Benington	Visit Herts
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