APPENDIX 1A

Hertford Town Council

Sustainable Tourism Strategy: Secondary Research Evidence Base

2024

TO SUPPORT HERTFORD'S SUSTAINABLE TOURISM STRATEGY & STAKEHOLDER ENGAGEMENT

HERTFORD TOWN COUNCIL

CONTENTS

INTRODUCTION

This report looks to help inform the development of the Hertford Sustainable Tourism Strategy and stakeholder engagement activity, by providing an evidence base, and to also inform benchmark metrics and rationale for priority activities.

Firstly, this section will look to analyse national-level data from VisitEngland, VisitBritain and other external data sources, including current sector performance, consumer sentiment, key motivations and perceptions, alongside current trends and audience insights. As sustainability is at the heart of the project's key ambitions and activity, this section will also look to present key insights on the topic, and indicate how these can be used effectively to position sustainability for consumers, including visitors and the community, and how this can be integrated within activity moving forward adopting an insights-led approach.

The report will then analyse local data and trends, drawing upon existing insights which will add a localised context to the evidence base. This includes local visitor economy performance, key insights into perceptions of the destination and audiences, alongside important resident insights, that are of course integral to the development of the destination and placemaking. This data will be vital to help shape the recommendations and actions developed, as well as define USPs which will help to position Hertford as a must visit destination. The report will also look to map Hertford's product offering, drawing out key strengths and USP's, alongside a SWOT analysis.

- **Secondary Research Analysis - National & Local Data**
- **Product Mapping & Options Analysis**
- **SWOT Analysis**

'THIS DATA WILL BE VITAL IN SHAPING THE RECOMMENDATIONS AND ACTIONS WITHIN THE STRATEGY, AS WELL AS DEFINE USP'S WHICH WILL HELP POSITION HERTFORD AS A MUST VISIT DESTINATION'

SUSTAINABILITY AND REGENERATITIVE TOURISM

The need for a regenerative approach to destination management is key, ensuring the economic impact is balanced with positive impacts on local communities and the natural environment. This a key priority for Hertford Town Council with a number of sustainability initiatives already being rolled out in the town, it is a key driver for the development of this strategy. This priority is also reflected in the Hertfordshire Growth Board Missions, the East Herts Climate Change Strategy and Environmental Sustainability Action Plan. With so many initiatives in place, a joined up approach is important.

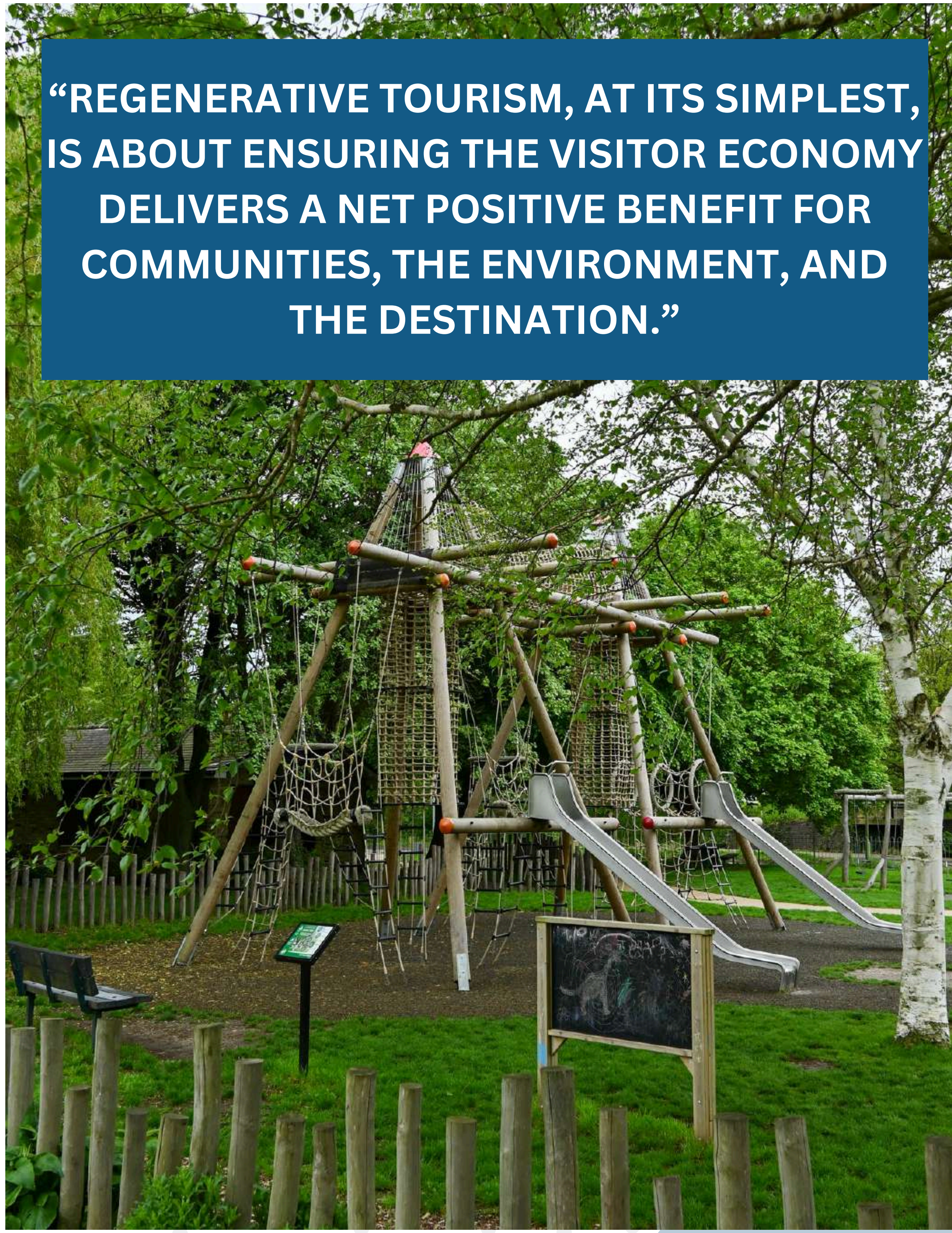
Hertfordshire Futures' strategy for clean growth highlights that the county's population is set to increase by up to 175,000 by 2031, with 100,000 new homes, and the creation of an equivalent number of jobs over the same period. As a result, there is a strong emphasis required on ensuring sustainable development, alongside safeguarding the natural and built heritage, and prioritisation of sustainable transport solutions.

Sustainable tourism is also driven by consumer demand, a growing awareness of our carbon footprint, over tourism in certain areas and the impact visitors have on the natural environment. However, there are significant barriers for both businesses and visitors in making positive changes

- According to Booking.com's latest annual sustainable travel research, **45%** of respondents feel that travelling more sustainably is important, however not the primary consideration when planning or booking. However, reassuringly **75%** of travellers say they do want to travel more sustainably over the next 12 months, with **71%** stating that they want to leave places better than when they arrived, up from **66%** last year.

- Research highlights the importance of implementing sustainable practices within a destination, with a significant proportion of travellers believing that governments and travel service providers hold the key to counteracting environmental impacts. This was further supported by more than a third of travellers stating that they may be deterred from adopting sustainable behaviour whilst visiting a destination that is not implementing sustainable practice themselves. Consequently, **67%** of travellers stated that when they do observe sustainable practices it inspires them to be more sustainable in their everyday life.

"REGENERATIVE TOURISM, AT ITS SIMPLEST, IS ABOUT ENSURING THE VISITOR ECONOMY DELIVERS A NET POSITIVE BENEFIT FOR COMMUNITIES, THE ENVIRONMENT, AND THE DESTINATION."

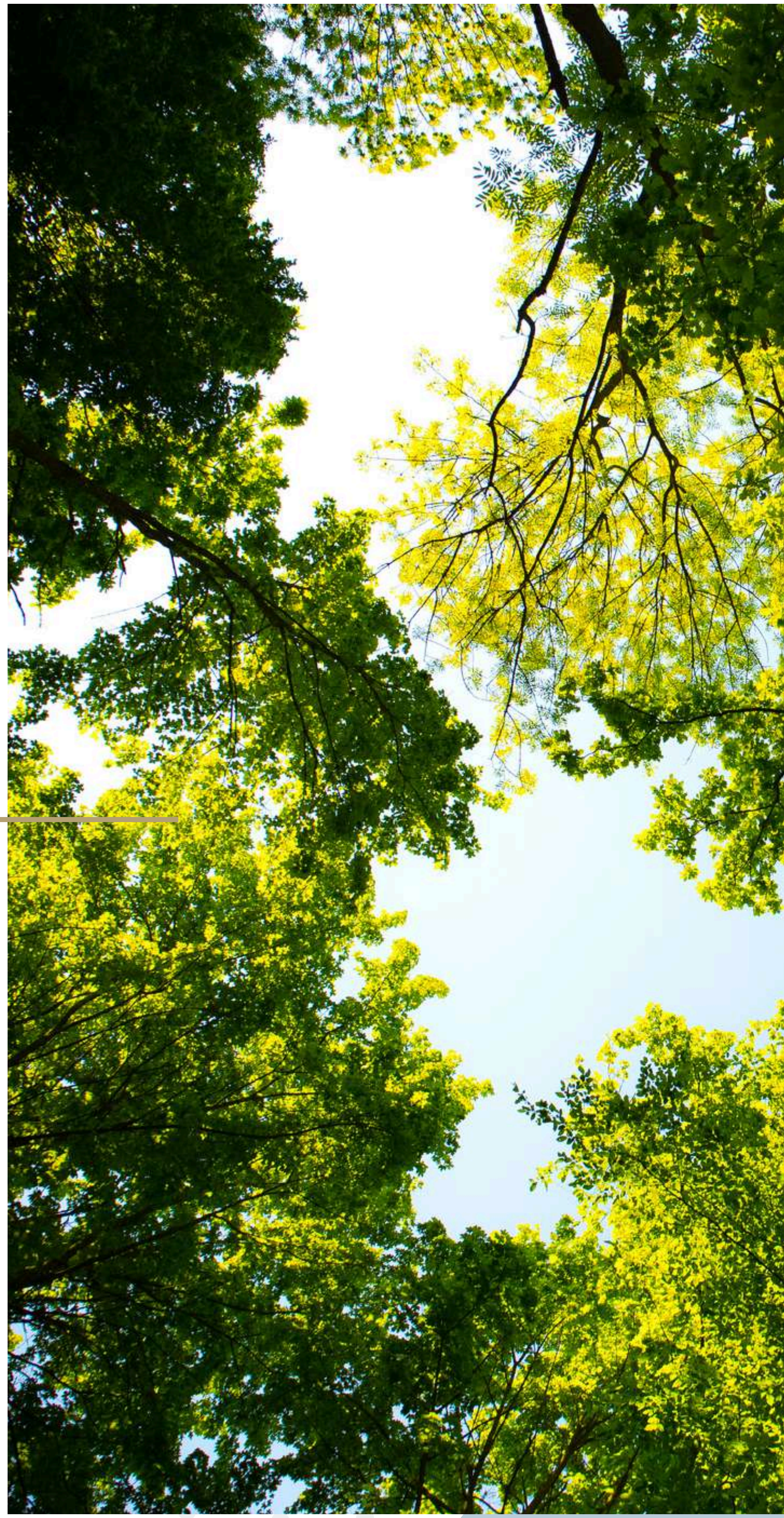


According to VisitBritain's MIDAS research, the term sustainable/responsible tourism is interpreted very broadly among inbound markets, with buying local being the most dominant behaviour among tourists. Insights also highlight that a quarter of travellers would be motivated to choose a destination that is committed to preserving natural and cultural heritage, and **20%** who selected destinations that are supporting local tourism businesses and investing in local communities.

However, when looking at barriers to engaging in sustainable behaviour, top responses included perceived high cost, lack of understanding, and a lack of trust of credentials and green claims, in addition to a lack of sustainable options available.

The research also highlighted that a quarter of travellers either have or travel with someone who has an accessibility requirement, demonstrating the importance of accessible infrastructure and facilities.

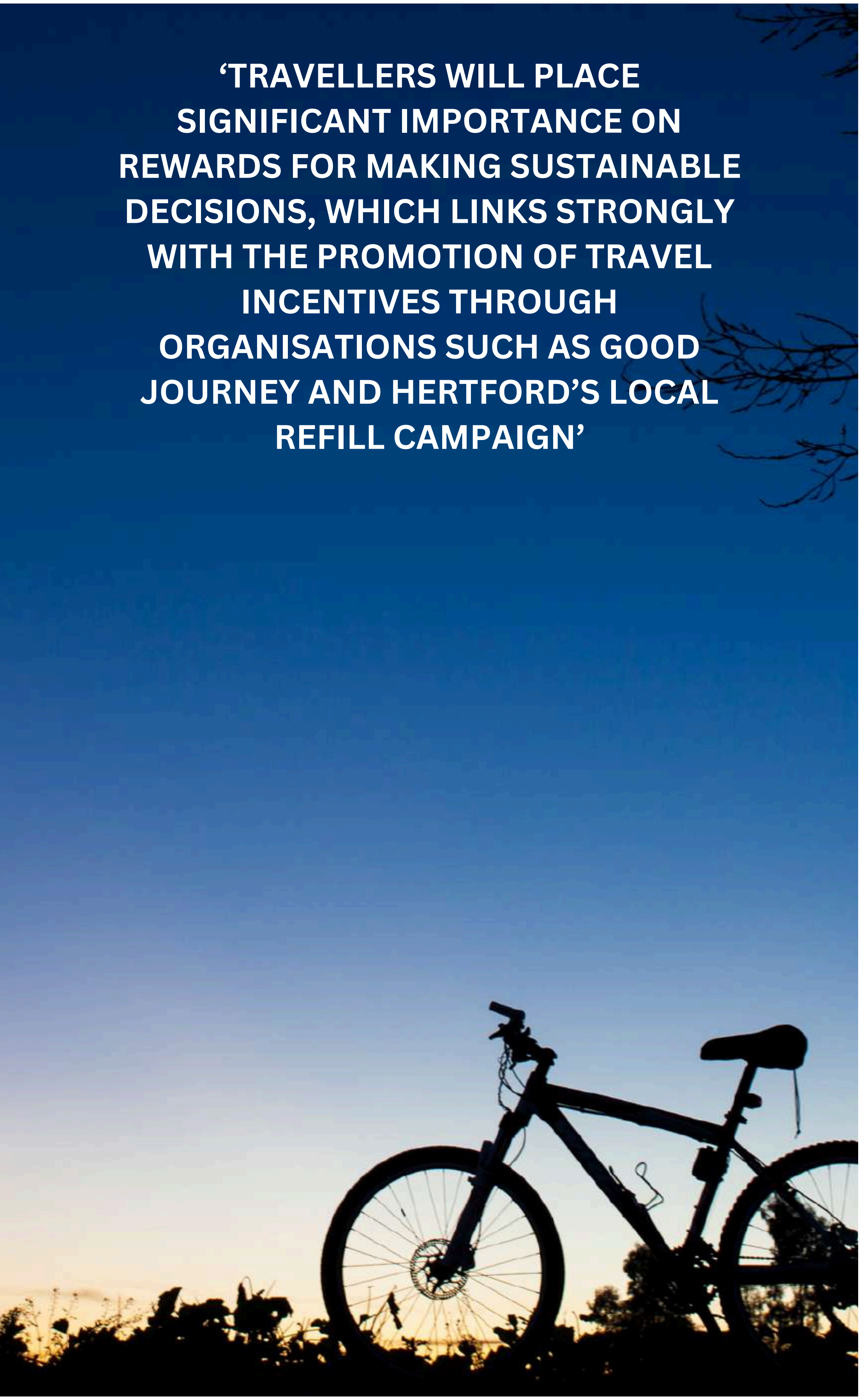
Findings also highlighted that Britain is also perceived as one of the most inclusive countries among LGBTQIA+ inbound travellers.



As highlighted in the Hertfordshire Local Transport Plan, there is a key emphasis on encouraging public transport and active travel, with the need to reduce reliance on car use and optimise active travel options and infrastructure to benefit local communities.

Data published by the Office of Rail and Road show there was a total of **1.61 billion** journeys made by rail passengers in Great Britain in the last year (1 April 2023 to 31 March 2024), representing an increase of **16%** on journeys made compared to the previous year. These findings certainly demonstrate a potential shift in consumer behaviour, however there is a need to further encourage the use of sustainable transport options.

According to a report by the Energy Saving Trust, behavioural change around modal shift on both an individual and community level plays a significant role, with transport being responsible for **34%** of UK admissions in 2022, mainly from road transport. This highlights the importance of effective community engagement and the need to address barriers.



When looking at key groups, two thirds of low income communities did not feel involved in transport decisions, whilst the 2021 National Travel Survey highlighted that young people aged 17-29 are more inclined to use public transport, compared to other age groups. Furthermore, those aged over 50 were more prone to use private transport, with this potentially demonstrating that younger people can be empowered to encourage other groups to adopt more sustainable transport decisions.

Insights demonstrate a demand for sustainable **accommodation**, alongside a strong interest in engaging with **local produce and natural and built heritage**.

Research highlights the need for increased **collaboration** and to ensure that businesses are ready and **resilient** to adopt sustainable practices and that destinations are effectively showcasing sustainable efforts and initiatives. And while VisitEngland’s Annual Attraction survey highlighted that over half of attractions have **invested in accessibility provision** and an additional **61% have an environmental strategy** in place, financing this activity may be a challenge, with only **17%** having ring-fenced budget to meet objectives.

Overall, there is a strong emphasis on the need for **infrastructure and wayfinding investment, alongside the effective promotion** of sustainable travel options to both local residents and visitors. Here, various barriers can be addressed, including perceived length of journeys, poor connections and the availability and reliability of services, in addition to cost and perceived delays.

Mirroring key trends, travellers will also place significant importance on **rewards** for making sustainable decisions, which links strongly with the promotion of travel incentives through organisations such as Good Journey and Hertford’s local refill campaign.

Developing a national regeneratitive tourism approach

VisitEngland is developing a regenerative tourism framework for England which will be aligned to the UN Sustainable Development Goals, and aims to deliver positive transformation for people and places. They will work closely with nationally accredited Local Visitor Economy Partnerships on research, best practice and industry support.

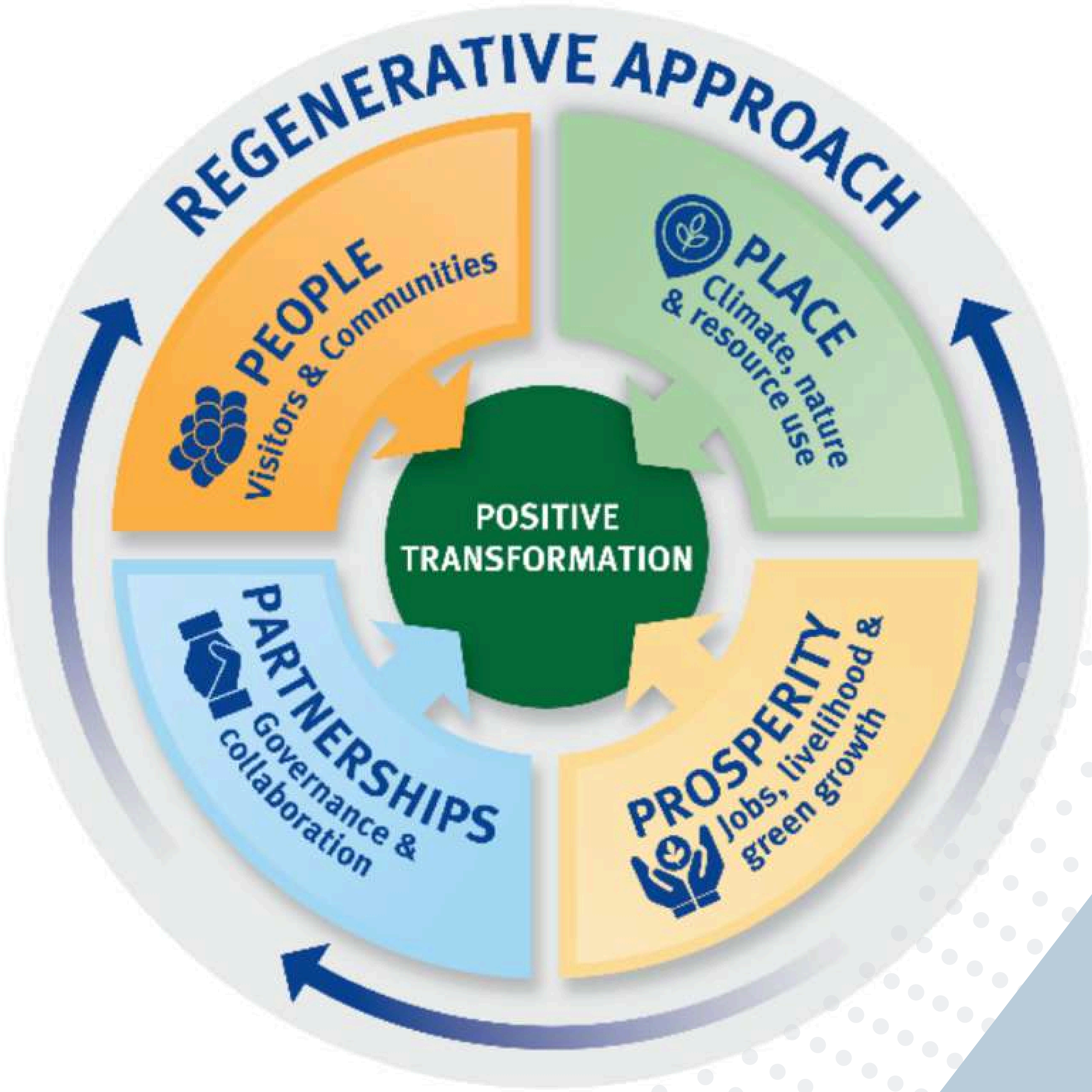
Visit Herts is the accredited LVEP for Hertfordshire and earlier this year they launched a new Sustainable Tourism Hub for businesses containing practical business resources and best practice. The forthcoming Hertfordshire Destination Management Plan includes sustainable tourism priority action areas, including a focus on celebrating local produce and **reducing food miles**, driving **modal shift** and supporting **nature positive tourism** initiatives.

Sustainability Accreditation

There are over 100 different sustainable or green tourism accreditation or certification schemes for tourism businesses. Research has shown that this can be confusing for consumers and erodes confidence in the schemes. Schemes that are aligned to the Global Sustainability Tourism Council criteria provide a level of confidence, but ultimately each business needs to decide if this is a useful tool to support them on their sustainability journey. They must also decide how they use this effectively to communicate their sustainability practices. Some of the most common schemes include:

- Green Tourism
- Sustainable Restaurants Association Food Made Good Standard
- Greengage Eco Smart

There are also destination schemes available for cities and regions such as Green Destinations and the GDS Index which help places benchmark and monitor their progress.



CASE STUDY: CopenPay

Copenhagen's aptly named initiative CopenPay implemented by Wonderful Copenhagen introduced a new honour-based reward scheme which ran from 15th July – 11th August, for visitors when exploring the Scandinavian city.

The scheme incentivised visitors to earn rewards based on specific contributions they made towards sustainability goals, these included:

- Participating in beach cleaning or working in an urban garden to earn a free lunch.
- Travelling by bike or public transport to a specific attraction for a free tour or unique activity.
- Taking plastic waste to the National Gallery of Denmark for the chance to turn it into a work of art.

Of course, the rewards visitors received depended on the attraction they visited, and due to this being a pilot programme, a targeted selection of 24 attractions participated. The key feature of this initiative is that before attaining the rewards, visitors had to earn them. In some cases visitors had to show proof of their sustainability journeys such as the bike they used or the train ticket they purchased. Others were entirely based on trust without the need for evidence, as they incentivised green travel, for example, visitors could request a 45-minute free ride on a Donkey bike as part of their pledge to behave sustainably during their trip.

Rewards also included free kayak rentals, free vegetarian lunches made from local produce, complimentary guided museum tours and even skiing on the grassy rooftop of Copenhagen's heating plant. In creating these fun incentives, the scheme created a relatable programme that visitors could engage with easily and learn from, leading them to behave more sustainably in their day-to-day lives. This behaviour change as a whole, will result in a more positive experience for visitors, leading to wider exposure and awareness for the destination, as well as a greener reputation nationally and globally.

With the right parameters and rewards, this scheme could be effectively replicated in other destinations where sustainability might not be as integrated as it is in Copenhagen, which is placed third in the Global Destination Sustainability index table (GDS).

To incentivise this in a location such as Hertford, a reward system could be put in place and combined with existing campaigns such as the Hertford Refill scheme. It would then require collaboration with local businesses to select unique rewards or discounts that could add to the visitor experience, all the while encouraging them to think sustainably. For more information on CopenPay visit their **website** visitcopenhagen.com/copenpay.

Other rewards included free kayak rentals, free vegetarian lunches made from local produce, complimentary guided museum tours and even skiing on the grassy rooftop of Copenhagen's heating plant.

KEY NATIONAL TRENDS

Due to the ever-evolving needs of consumers and the current UK economic climate, it is important to understand and then integrate current travel trends into planned activity. By recognising how these insights can help inform marketing strategies and activity, products and messaging can be effectively positioned and conveyed to potential visitors to maximise on various opportunities and attract visitation.

1 Rest & Wellness

Research conducted by Hilton highlighted that travellers are looking to travel in order to rest and recharge, with more emphasis on sleep than ever.

Travellers seek out products and experiences linked to wellness and the outdoors, with travel not just being an escape but also an opportunity for transformation.

2 Experiences & Memories

Travel trends also highlight that more than ever, consumers will be placing increased emphasis and importance on the purchase of experiences rather than material possessions and a focus on exploration and adventure, with Gen Z's and millennials in particular looking to carve out more budget for these types of activities.

3 Hidden Gems

Hertfordshire was recognised by Expedia as one of the UK's Top hidden gems for short breaks, with trends showing that travellers are looking to explore places that may be less familiar and that offer authenticity. Trends also show that travellers may be more inclined to explore areas off the beaten track with a shift from more rigid planning to embracing spontaneity.

4 Pursuit of value

Given the cost of living increases, consumers have become more cautious with spending, having a savvier mindset and seeking value for money. Travellers will look to prioritise affordable luxury on a budget, balancing financial constraints with the need to prioritise experiences.

Some pet owners will consider bringing their pets along to reduce pet sitting costs which offers an opportunity to promote dog-friendly activities and accommodation.

5 Bleisure & Micro-cations

With an increase in flexible working and value placed on achieving a positive work-life balance, there has been a rise in travel that combines business with leisure, including opportunities to reconnect with colleagues through team building activities and days out. This presents an opportunity to increase business visit length of stay by incorporating leisure activities.

6 Multi-Generational & Group Travel

There is predicted to be an uplift in multi-generational and group travel, with consumers looking for opportunities to create shared experiences, and options which may also present a more cost-effective option. Alongside this, as the UK has a growing aging population, meeting accessibility needs is a key requirement.

7 Convenience

There is a high demand for convenience among consumers, who seek out faster and easier solutions. Consumers expect convenience in all aspects of their lives; AI and technology will drive this further, embedding itself into the consumer journey to influence decisions.

8 Sustainable Tourism

With an ever increasing awareness and consciousness of the importance of sustainability, there will be an increasing appetite for sustainable and eco-friendly options. This will include accommodation that combines comfort and sustainability, the serenity of the outdoors and green spaces, in addition to reward-based schemes for making sustainable decisions.

9 Enhancing Relationships

Key trends also highlight that travel will be driven by a desire to make deeper connections and strengthen bonds with partners and loved ones. This may also include a rise in solo travel and a desire for self-discovery, as well as parents wanting to travel child-free.

10 Culinary Experiences

Culinary experiences will be a priority among travellers, driven by a desire to sample local produce. Booking.com's research shows that half of travellers plan their trips around specific restaurants or dishes.

INBOUND INSIGHTS

Inbound Visitation

- In 2023, the UK saw **38 million** inbound visits, generating **£31.1 billion**. Results show that whilst visits were still down **7%** compared to 2019, there was a **21%** increase versus 2022, with spend seeing an increase of **9%** versus 2019 and a **17%** increase versus 2022. This strong performance also extended to the number of nights, which realised a **1%** increase versus pre-pandemic levels and an **11%** increase versus 2022.

- In terms of regional performance, the East of England received a total of **2.2 million** inbound visits, generating **£1.1 billion** in spend, enjoying a **9%** and **13%** increase respectively.

- Looking ahead to 2024, VisitBritain forecasts a total of **38.7 million** inbound visits and **£32.5 billion** in spend, **95%** and **92%** of the 2019 levels respectively. When adjusting for inflation, this represents a **2%** growth in visits and a **5%** growth in nominal spend (2% in real spend).

- Journey purposes also show recovery at different rates, and when comparing 2023 to 2019, holiday visits were down **6%**, although visits to friends and relatives surpassed 2019 numbers by **3%** despite the pandemic, these visitors usually stay longer but spend less than those visiting for holiday purposes.

Inbound Card Spending Data

- According to findings published by VisitBritain on inbound spending using Visa card data, total spend and card count increased year-on-year in 2023, above rates of inflation.
- Insights show that spending behaviour is shifting following the effects of the COVID-19 pandemic, with inbound visitors making more frequent, smaller purchases in 2023, alongside displaying a lower spend per visit and length of stay compared to 2022.
- When assessing data on a more granular level, inbound spend was most likely seen in the south of England, with Greater London accounting for the majority of this share (**60%**).
- Outside of the capital, in terms of share of spending, top destinations included Oxfordshire (**2.7%**), Cotswolds and Sussex (both **1.3%**), followed by Bristol & Bath, Cambridgeshire & Peterborough, Hampshire (all **1.2%**) Berkshire, Hertfordshire, Kent and Somerset (all **1%**).
- Looking at Hertfordshire more specifically, spending saw an increase of **28%** in 2023 vs. 2022, slightly above the recorded growth for the region as a whole (**26%**).
- In terms of seasonality, insights show that the largest proportion of spending was concentrated on the summer months, between July-October, with a further spike in December. Consequently, this highlights the need to boost off-season visitation through product development in destination.
- Looking at spend by area, Hertfordshire saw a good spread across various areas, and overall, in line with averages for the UK. However, looking at key differences for Hertfordshire, spend for entertainment purposes sat above the average seen for the south of England (**12%** vs. **3%**), with spending for retail purposes also being higher for the county vs. the region (**33%** vs. **25%**).

Inbound Perceptions & Motivations

- Looking to international perceptions, according to VisitBritain, some of the UK's highest ranking attributes for 2023 were buying products made in the UK, contemporary culture and having a close friend from the UK.

- Key strengths included historic buildings and monuments, vibrant cities and urban attractions, with contemporary culture remaining one of the strongest attributes alongside cultural heritage.

- In terms of key drivers and motivation international visitors look for offers and good value for money, a destination that is welcoming, the ability to visit many types of places and to relax, rest and recharge.

- Visitors also look for beautiful countryside to explore with accessibility and ease of travel being key influences. These insights also highlight the popularity of experiential activities coupled with a good variety of food and drink to sample.

- As expected, international visitors also want to visit famous sites and tick off the "must see" list, so here there may be an opportunity to use key hooks potentially in the capital and extend length of stay to encourage visits outside of London, through itineraries and cross destination promotion.

- Research from VisitBritain also shows that screen tourism is an influential trend among inbound visitors, with 7 in 10 visitors to the UK who had taken a leisure trip in last 10 years having visited a film or TV location. Insights demonstrate that screen is a sizable opportunity to leverage, and can be a key driver in influencing visits, including the consumers' decision to travel outside of London and in attracting the younger demographic which is a key interest market for Hertford.

THESE INSIGHTS DEMONSTRATE KEY OPPORTUNITIES AROUND THE CULTURAL SCENE PAIRED WITH FOOD AND BEVERAGE EXPERIENCES TO ATTRACT YOUNGER OR FIRST TIME VISITORS. DESTINATIONS CAN ALSO LOOK TO POSITION THEMSELVES AS OFFERING A DIVERSE PRODUCT OFFERING THAT CAN BE INCLUDED IN ITINERARIES AND TAILORED FOR DIFFERENT AUDIENCES.

'INSIGHTS STRONGLY DEMONSTRATE KEY OPPORTUNITIES AROUND THE PROMOTION OF HERTFORD'S HERITAGE AND CULTURAL OFFERING, GOOD TRAVEL LINKS TO LONDON, ALONGSIDE THE TOWNS EVENTS CALENDAR AND LOCAL PRODUCE'

DOMESTIC INSIGHTS

The visitor economy is a key mechanism to wider growth, and when managed effectively can contribute positively to a destination's economy, environment and community. A thriving visitor economy helps to create vibrancy, a strong sense of place and pride among local communities, this contributes to creating a place that is attractive for people to live, work, study, invest in, and visit.

Domestic Overnight Trips

- According to data from VisitBritain, in 2023 there are **117.3 million** domestic overnight trips nationally, generating **£30.9 billion** in spend. These trips consisted of an average of 2.9 nights per trip with **£264** average spend per trip.
- However, the current data shows a decline in volume and value of overnight trips both nationally and in England, compared to 2022. This decline seems to be driven by holiday trips which dropped by **14%**, although still representing the second largest share of trips overall. In addition, this decrease could also be strongly impacted by the cost of living crisis and its influence on consumers' travel behaviour, prioritisation and spending power.
- Insights show that the most common purpose for taking an overnight trip was to visit friends and relatives (37%), followed by holiday trips which accounted for **32%** of total overnight stays nationally, whilst business trips represented **5%** of the total share of trip volume.
- Looking further at the total value share, holiday trips represented **39%** total value share whilst visiting friends and relatives stood at **24%** and business trips at **8%**.
- In terms of share within England, visits to the East of England accounted for **9%** of total visits, whilst London sat at **15%**, with the region accounting for **8%** of total spend.
- Key insights also included that a city or large town represents the key destination type, followed by small towns in terms of both volume and value, which strongly highlights the appeal of urban destinations.
- When looking at accommodation, **45%** of trips included serviced accommodation, followed by private homes (**30%**). However, when looking at value, serviced accommodation (**56%**) followed by commercial rental properties (**15%**) and private homes at **14%**.

Domestic Day Visits

- In 2023, there were **1.2 billion** day visits made nationally by domestic visitors, an increase of **7%** versus 2022, with the first half of the year showing stronger growth, likely due to the impact of COVID-19 in early 2022.
- These trips generated a total of **£50.8 billion** in spend, which saw an increase compared to the previous year (5% in real terms), with visits generating an average spend of **£44** per visit – a **2%** increase in real terms versus 2022.
- Whilst visits to the East of England saw an **11%** decrease versus 2022, total spend saw a **3%** increase, and accounted for **8%** of the total share of spend in England.
- Visiting friends and relatives remained the most frequent type of visit, with trips for this purpose seeing a **9%** increase in spend nationally.

When looking at these results, insights certainly highlight the strength and opportunity of the VFR market and the need to turn residents into ambassadors. Partly driven by the cost of living crisis, people are looking to stay with friends and relatives to save money on accommodation, allowing them to have more disposable income for spending as part of their visit.

And while the East of England saw a decrease in the total volume of day trips, the increase in spend links strongly with the idea of prioritising value over footfall, to help contribute to the sustainability agenda and a regenerative approach to destination management.

Due to the increase in the cost of living, the travel behaviour of visitors and residents will have been impacted by increasing concerns around spending. However there are a significant number of people who will still prioritise travel, but look to spend money on trips and activities that offer value for money, so demonstrating this is key.

Attractions Performance

According to VisitEngland's Annual Attractions Survey, attractions in England saw an **11%** increase in visits in 2023 compared to 2022, this still represents a shortfall of **28%** against 2019. Regionally, the East of England saw an increase of **4%** in admissions, although this is still down **4%** compared to 2019. Revenue saw an increase of **10%.**

When filtering by attraction type those that were free to enter saw a **14%** increase in visitation, with attractions in urban areas experiencing the largest increase of **17%**. Insights also show the popularity of historic houses & castles which saw a **13%** increase, alongside visitor & heritage centres (up **14%**), while museums & art galleries saw a stronger performance (up **20%**).

The report also highlighted the impact of rising supplier costs, with **71%** being affected, and two thirds being impacted by increasing energy costs.

‘INSIGHTS DEMONSTRATE A STRONG APPETITE FOR HERITAGE AND CULTURAL OFFERINGS, ALONGSIDE AN APPETITE FOR INSPIRATIONAL, AND FREE THINGS TO DO AS PART OF VISITS’

Domestic Perceptions & Motivations

- According to VisitBritain's domestic day visits data for 2023, sightseeing and exploring areas saw a **2%** increase in visitation, attending organised public events saw a **19%** increase, with results also showing strong interest in art and cultural experiences, which enjoyed a **36%** increase.
- In terms of spend, those visiting friends and relatives and those that went for food & drink, nights out or speciality shopping, saw a **5%** increase in spend, and accumulated the largest spend in 2023, highlighting strong opportunities around this market and activities.
- The largest year-on-year increase in terms of spend was for arts and cultural experiences (up **54%**), which again indicates the value of this type of offering among consumers.
- Consequently, these insights strongly demonstrate key opportunities around the promotion of Hertford's heritage and cultural offering, alongside the towns events calendar.

'THE LARGEST YEAR-ON-YEAR INCREASE IN TERMS OF SPEND WAS FOR ARTS AND CULTURAL EXPERIENCES, WHICH DEMONSTRATES THE VALUE AND GROWTH IN DEMAND OF THIS TYPE OF OFFERING AMONG CONSUMERS'

CONSUMER SENTIMENT

In addition to key trends, it's important to assess consumer sentiment, particularly given the cost of living crisis. VisitEngland's Domestic Sentiment Tracker for July 2024, highlights cautiousness around spending. It sets out future travel intentions, travel behaviour and influencing factors.

- **77%** of UK adults are planning a UK trip in the next 12 months, compared to **75%** a year earlier. However, when looking at potential barriers, responses included the rising cost of living, UK weather and personal finances.
- Insights also highlighted barriers around the cost of accommodation, drinking and eating out, with UK adults planning to cut spending on these aspects and **25%** looking to reduce the number of trips they will take.
- Consumers will be looking for more **free things to do**, alongside a desire to spend more time with family and treating short breaks as an opportunity to rest.
- The top activity for future trips centred around **local food and drink**, followed by walking, hiking or rambling, with these being popular throughout the year, and also **heritage and cultural attractions**.
- According to a 2021 VisitEngland report, **76%** of UK residents prefer to take at least one staycation pay year, with some preferring an overnight stay domestically, with UK holidays being easier to plan, cheaper and quicker to travel to. This strongly highlights an opportunity to further promote **staycations** and capitalise on this trend.
- Insights shared by Booking.com show that UK breaks are frequesntly booked between **1-3 months prior**, although there has been a surge in **last minute bookings**. Destinations must capitalise on both planned and spontaneous trips and capture audiences at the right time, this includes promoting visits among local residents and those from the surrounding areas.

LOCAL DATA ANALYSIS

PERFORMANCE

In order to support the continued environmental and economic development of Hertford, it is important to understand local performance to identify trends and future opportunities, not only for the town but on a county and district level.

- Figures from the Hertfordshire Economic Impact Cambridge Model study based on 2022 data, demonstrate strong recovery of Hertfordshire's tourism & hospitality sector following the pandemic. This uplift was strongly supported by the preference for UK residents to stay within the UK rather than going abroad, coupled with the return of international markets and those staying with friends & relatives.

- In 2022, the county received over **25 million** combined day and overnight trips, up from **19.6 million** in 2021, although still behind 2019 levels (**29 million**). Although the volume of trips has not yet recovered to 2019 levels, the value of the visitor economy increased to over **£2.2 billion**, representing a **40%** increase compared to 2021 and just behind 2019 which topped **£2.4 billion**. Data also shows a significant uplift in jobs in 2022, an increase of **15%** compared to 2021, demonstrating the importance of the sector, which accounted for **6%** of total employment in the county.

- Key findings also showed that **average length of stay** and **spend per head** increased, with both tracking higher compared to 2019 figures and national levels. These insights link strongly with objectives set out in the Hertfordshire Destination Management Plan, which looks to increase both length of stay within the destination and spend per visit. These objectives lend themselves to the notion of regenerative tourism, whereby emphasis should be placed upon increasing dwell time and spend, as opposed to volume that may contribute to ongoing environmental issues.

- The increase in visitation was also driven by the return of **business travel**, which in 2022 accounted for **16%** of trips compared to **3%** in 2021 and **19%** in 2019. Consequently, this also accounted for **25%** of the total value of trips, further demonstrating the potential of the business travel market. However, to ensure continued growth, this will need to be further driven by responding to key trends including incentive travel and bleisure,

Hertfordshire 2022 Results

£2.2bn in value
+40% vs. 2021

£295.33 average spend per overnight trip
+14% vs. 2019

- When looking at district level results, the study shows that East Herts saw a total of **4.5 million** day and overnight trips, generating a total value of **£292.7 million** - which had increased by **38%** compared to 2021 and was on par with pre-pandemic levels. And similar to the results at county level, these demonstrate strong signs of recovery; this included a **14%** increase in jobs supported compared to 2021.

- Visits to the district incuded **4.2 million** day trips, an increase of **28%** vs. 2021 and on par with 2019. This generated a total value of **£164.4 million**, which not only saw a **33%** increase versus 2021, but also **3%** growth compared to 2019, and accounted for **18%** of total day visits within the county. As a result, this demonstrates the strong appeal of the district as a day trip destination.

- In terms of overnight trips, although this is still **12%** down versus 2019 results do show an increase of **11%** versus 2021 representing **16%** of total county overnight trips. And when looking at the value of these visits this saw a **59%** increase vs. 2021 and an increase of **2%** vs. 2019, accounting for **23%** of total overnight spend within the county.

- Similar to county results, average length of stay increased compared to 2019, with East Herts seeing an average length of stay of **6.02 nights** compared to **5.48** for Hertfordshire as a whole. East Herts also saw a higher spend per overnight trip compared to the county **(£315.99 vs. £295.33)**, Which saw a rise of **43.4%** vs. 2021 and just under **16%** compared to 2019.

- East Herts also received a higher proportion of trips for holiday purposes compared to the county (**57%** vs. **47%**), which also generated a higher proportion of spend (**44%** vs. **31%**). Furthermore, when combined with the district generating a higher spend per overnight trip, this demonstrates the appeal of the area as a leisure destination.

- Finally, when looking at the breakdown of expenditure, insights show that overseas overnight visitors spent significantly more on shopping vs. domestic visitors (**29%** vs. **12%**), whereas UK overnight visitors spent a higher proportion on food & drink (**26%** vs. **23%**), which may potentially highlight the appeal of these activities and products among these markets.

East Herts 2022 Results

£292.7M value
+38% vs. 2021

£315.99 average spend per overnight trip

+15.8% vs. 2019

‘A HIGHER PROPORTION OF HOLIDAY TRIPS COMBINED WITH A HIGHER SPEND PER OVERNIGHT TRIP, DEMONSTRATES THE APPEAL OF THE AREA AS A LEISURE DESTINATION’

Looking at figures on a more local level, tourism contributes strongly to the Hertford local economy, supporting local job opportunities and seeing a strong number of overnight visitors who generated around a third of the total visitor spend.

- Results show that in 2022 there were a total of **655,800** day and staying trips to the town, and while trips were still down compared to 2019, both day and overnight trips saw significant increases compared to 2021. In terms of total value, this stood at **£51.2 million**, seeing a **121%** increase compared to 2021 and only a smaller decline of **4%** vs. pre-pandemic levels.
- Insights also show that Hertford over indexed in terms of average length of stay compared to both the county and district, with the town seeing an average stay of **8.03 nights**. Similarly, Hertford also attracted a higher average spend per overnight trip at **£333.25**, with this seeing an increase of **37.3%** vs. the previous year and an increase of just under **13%** compared to 2019.
- When looking at trips by purpose, Hertford received a higher proportion of VFR (visiting friends and relatives) visits (**43%**) compared to East Herts (**25%**), whilst visits for business purposes accounted for **20%** of trips compared to **15%** for the district.
- According to data published by the Office of Rail and Road, from April 2022 - March 2023, Hertford East received a total of **900,942** entries and exits, with Hertford North receiving a total of **863,302**. When looking further at the breakdown of ticket types both stations received the below breakdown.

FULL PRICED TICKETS 38%
REDUCED TICKET PRICE 49%
SEASON TICKETS 13%

- Results undoubtedly demonstrate opportunities to further leverage Hertford as a destination for a range of trips including leisure, VFR and business visits. Activity should also continue to attract overnight visitation, increase dwell time and spend.
- There are opportunities to increase the use of public transport by utilising the town's stations, through the promotion of travel incentives to encourage sustainable transport options. This can be supplemented with the promotion of walking routes and times, not understating the importance of wayfinding, signage and active travel infrastructure.

Hertford 2022 Results

655,800 TOTAL VISITS
616,000 day trips
39,800 overnight trips

£51.2M VALUE
+121% VS. 2021
-4% VS. 2019

AVERAGE SPEND PER TRIP
£333.25 OVERNIGHT TRIP
£40.73 DAY TRIP

963 JOBS
+82% VS. 2021
-2% VS. 2019

CASE STUDY: Good Journey

Changing visitor behaviour within destinations can be challenging, something Good Journey has been successful in as they've found a solution that benefits both businesses and visitors.

Good Journey, a non-profit company, are experts in the field. They promote easy and affordable car-free days out to reduce an attraction's carbon emissions:

- Offers on discounts on iconic spots and hidden gems to visitors if they travel car-free.
- Appeal to new visitors who are making more sustainable choices.
- Reduce parking issues and car-related emissions (60% of behavioural emissions come from visitor travel).
- Improve connections to public transport and active travel routes such as cycling paths, increasing people's wellbeing and the number of longer stays.
- Widen access, increasing the number of people who will be able to reach the attraction (24% of people in the UK don't own a car).

Good Journey's model is similar to Copen Pay, if the visitor travels to a certain business car-free, they are then eligible to receive a reward e.g. discount, gift bag etc… By doing so, their partnership can unlock many opportunities including attracting new visitors with car-free travellers, cutting their carbon footprint significantly and increasing their income.

For example, Blenheim Palace has produced some very positive results and given both the business and the destination more exposure through the Good Journey Partnership:

- 500 visitors a week now walk through their doors.
- The number of car-free visitors has gone up from 5,000 to 41,000 a year.
- This has brought them closer to getting 50% of their visitors to make carbon-friendly journeys by 2027.

Their team will tailor the partnership to the business by taking into account the surrounding area and improving green travel options through on-ground support. For the first year, businesses get 20% off their membership which unlocks a whole suite of benefits that they can make use of including:

- Their very own Good Journey page
- A link accompanied by a carbon-friendly message
- A Good Journey logo
- Expert support to improve green travel options on the ground

Their solution helps to increase awareness of a business' sustainability journey. In turn, this increases awareness and exposure of the destination, leading to more visitors, and a higher number travelling car-free. In addition, the Good Journey website drives the sustainability agenda in Hertfordshire and as businesses sign up, it will populate Good Journey's interactive map and increase the destination's digital exposure. As the sustainability agenda improves for more businesses and awareness increases, the destination will find itself further progressing in a direction that will improve the visitor economy. More information can be found on their website along with examples of many businesses from across the UK.

Visit Herts is also partnered with Good Journey and we are actively promoting this to businesses and consumers in Hertfordshire. To better integrate this within Hertford it would be helpful if key partners and businesses could share the advantages of Good Journey with the local community and businesses in the area.

Hertford Quarterly Footfall Data

- Looking at the latest quarterly footfall data, there were a total of **1.3 million** visitors in Q2 of 2024 and close to **2.7 million** for the year-to-date. Data shows that there were a total of **6 million** visitors in 2022 and just under **7.8 million** in 2023. Please note these figures are taken from data collected by HTC based on footfall recorded within the town centre, whereas data outlined previously in the Cambridge Model represents insights for the area as a whole.

- In terms of visitors by age, the largest proportion were aged **60+**, followed by those aged **30-44** and **45-59**, with Hertford receiving a smaller share of younger visitors. Insights show that Hertford over-indexed for visitors aged 60+ compared to the national results, whilst the town received a smaller proportion of younger visitors compared to regional and national statistics.

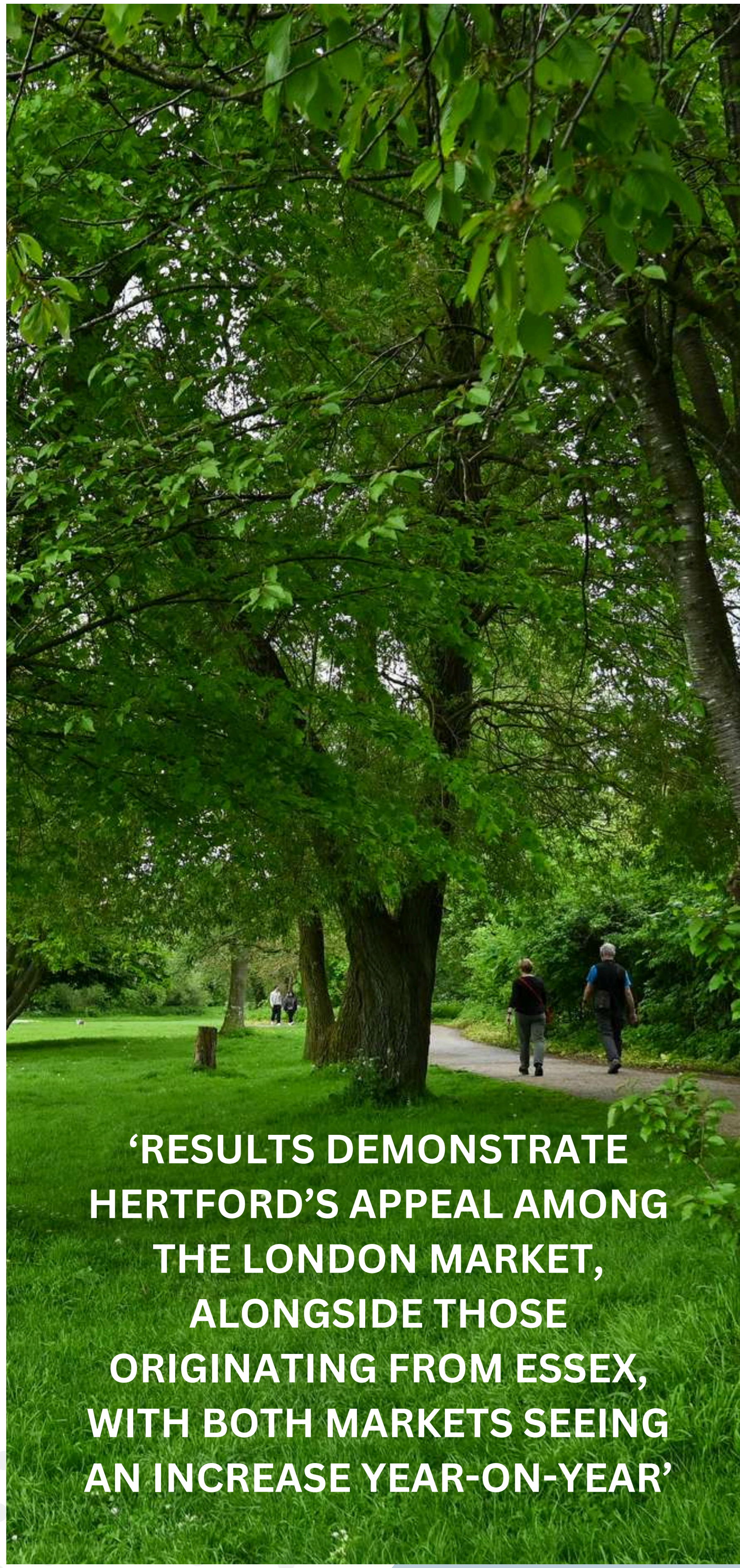
- Geographically, just under **62%** of visitors originated from within the county, followed by **13.5%** from London and **12.4%** from Essex, with additional key areas comprising of Cambridgeshire and the West Midlands.

- Results certainly demonstrate Hertford's appeal among the **London market**, and those originating from Essex, with both markets seeing an increase year-on-year. Subsequently, this presents an opportunity to further capitalise on the appeal of the destination, which is aided by **close proximity and strong transport** connections and the area's appeal as a **hidden gem** destination, away from the hustle and bustle of the capital.

- Insights highlight the importance and prevalence of the **hyper-local market** from within the town and the surrounding areas, including Ware, Buntingford, Stevenage and Bishop Stortford, in addition to Welwyn Garden City, Hatfield, Loughton, St Albans and Harlow.

- Here, insights show key opportunities for **cross-destination collaboration** with the surrounding areas, alongside the need to position and develop the town's product offering to appeal to a **younger demographic** and to further increase weekend visitation, through the promotion of **short breaks**.

2.7M visitors YTD in June 2024	62% Hertfordshire & 14% London	Largest proportion aged 60+



Hertfordshire High Streets

- According to a new report published by the Federation of Small Businesses, local businesses* in the East of England saw a range of closures on local high streets since the beginning of the pandemic, including retail stores (**72%**), and hospitality (**67%**).

- The report sets out plans to transform high streets across the region, which sets out recommendations for local authorities to create a specialist fund to help small businesses grow, this includes support for pop-ups, markets and temporary use initiatives, and also providing accessible public toilets.

- The proposed approach is supported by research that shows 39% of high street small businesses across the UK stated the availability of affordable commercial space is vital for the future. In addition, ensuring that temporary retail spaces are available, to help fill vacancies and to provide opportunities for small businesses that are eager to launch.

- The report sets out the need for well maintained and accessible modern public toilets and family friendly services, which will be vital in the effort to encourage visitors to stay longer, and increase spend to support the local visitor economy.

*Please note research referenced was conducted among FBS members and other small businesses.

ACCOMMODATION

National Accommodation

Another element that is important for developing the visitor offer and increasing the value of the visitor economy is strong accommodation provision.

- According to VisitEngland's occupancy survey, in December 2023 year-to-date, average occupancy for England stood at **77%**, representing an increase of **5%** compared to the same period in 2022.

- Looking at the regional picture in terms of occupancy and performance, for the East of England, average occupancy stood at **78%** in April 2024, with performance being on par with England results.

- In addition to serviced accommodation, the short-term rental market is one that has seen significant growth, with insights showing that in June 2024 there were 457,918 available properties in the UK - representing a **32%** increase versus 2019.

- And when looking at the latest results, in June 2024 the average occupancy stood at **47%** for the UK and **44%** for the East of England.

Local Accommodation

80.6% average occupancy in 2023 +5% vs. 2022

2,974 available short-term rentals in June 2024 +57% vs. 2019

'Findings demonstrate the strength of the county in terms of its accommodation and overnight offering, which can be utilised further to increase overnight visitation and spend'

- Looking at the performance of serviced accommodation, average occupancy for the county stood at **80.6%** in 2023, compared to **76.8%** in 2022, an increase of **+5%**.

- When reviewing national-level figures from VisitEngland's England Occupancy survey, year-to-date average occupancy stood at **77%**, an increase of **+5%** compared to 2022. Overall, this shows that the county saw a higher average occupancy compared to national figures, and maintaining a similar performance year-on-year.

- The short-term rental data published by VisitEngland, shows that in Hertfordshire there were a total of **2,974** available properties, with this having strong growth of **57%** vs. 2019. In June 2024, there were a total of **49,000** reserved nights, up **77%** vs. 2019 and representing a **48%** occupancy rate.

- Data also showed that in June 2024, the district had a total of 426 properties, representing an increase of **19%** versus 2019, and a similar occupancy rate compared to the county. Overall, as previously highlighted through Expedia's trend report, findings demonstrate the county's strength in terms of its accommodation and overnight offering, which can be utilised to increase overnight visitation and spend.

Hertford's Accommodation

- Hertford has a good range of accommodation including hotels, B&B's, Airbnb properties and boutique accommodation. As a destination, Hertford offers visitors both a choice of staying in a urban setting or venturing further afield and staying in a rural setting, this includes the Camping and Caravanning Club, glamping, and cabin options.

- With accommodation often being a key driver for visiting a destination, it is imperative that Hertford showcases unique options, including narrowboats, those close to nature and boutique hotels; national trends highlight that consumers will be prioritising rest, wellness and sleep.

- With serviced accommodation being top choice for future trips, it will be important to promote the range of options and to demonstrate value for money including more affordable options alongside high end luxury alternatives. National insights also highlight that consumers may look to stay with friends and relatives in private homes, a focus on promoting inspiration for things to do in the local area as part of their VFR visit will be key to maximise spend and dwell time.

PERCEPTIONS & MOTIVATIONS

As part of the Herts, Camera, Action Project, Visit Herts conducted a consumer product testing study. This looked to gather insights into consumers' perceptions of Hertfordshire as a tourist destination, their intent to visit Hertfordshire for a future day or overnight trip, and their key perceptions, influences and motivations.

- When asked about general leisure travel preferences for day trips and short breaks in England, results show that consumers look for good amenities such as quality food and drink, accommodation and transport links, alongside green spaces.

- Other aspects such as historical attractions were rated as the 5th most important aspect when choosing a destination. This percentage was higher among respondents who hadn't visited Hertfordshire previously. Consequently, these results demonstrate the importance of the heritage offering particularly to new visitors, which clearly presents opportunities to position Hertford Castle and upcoming developments as a key draw and a strength for the destination.

- In terms of key influences for previous and future trips, results strongly demonstrate the importance of accessibility, with the county being perceived as easy to get to and well positioned to attract visitors from the capital and Cambridge. Results also show that respondents were strongly influenced by the county's beautiful landscape and green spaces, in addition to quality food and drink and the need for good value for money.

Motivations & Influencers

Trips in England

Good places to eat & drink
Countryside/green spaces
Good transport links/easy to get there
Good accommodation
Historical attractions

Previous Trips to Herts

Easy to get to
it is a beautiful place
Green/countryside
Easy to get around
It is a relaxing place/quality food & drink

Non- Visitors: Future Trips

Good value for money
Quality food and drink
It is a beautiful place
Lots to see and do
Easy to get to

ACCESSIBILITY | **COUNTRYSIDE & NATURE** | **FOOD & DRINK** | **VALUE FOR MONEY**

- The results also demonstrate opportunities around the screen tourism offering to increase awareness of the product offering and visitor engagement. Findings show that there is a strong interest in potential screen tourism products, particularly those that link with well-known film/TV titles and those that are linked with the outdoors and nature.

Associations & Awareness

- When asking visitors and non-visitors about Hertfordshire, there are many positive associations that will have a strong influence on future visits. The region is mostly associated with being a traditional, relaxing countryside location. Key attributes include the natural beauty, the heritage offer, and that it is easy to get to the county. However, some perceptions around the destination being affluent could be challenging, particularly as people are more conscious of spending, there is a need to share important messaging around value.

- As expected, residents were able to identify key destination attributes, however awareness of the county was lower among those originating from other areas, with only 38% being familiar or very familiar with Hertfordshire as a destination. Furthermore, in order to build stronger USP's for the destination there is a need to raise awareness of the product offering and those strengths that people are less familiar with, including local produce, events and festivals, and experiences.

Future Visitation

- Results illustrate the growing appeal of Hertfordshire as a short break destination, with quality accommodation being an evident strength and 72% of non-visitors being open to visit for a short break. Overall, this presents an opportunity to further drive overnight stays and capitalise on key trends including hidden gem destinations, rest and wellness.

- Insights also demonstrate opportunities to pair Hertford's developing boutique accommodation offering with its strong cultural programme, local produce and independent shopping to attract visitation. Furthermore, destinations can benefit from working collaboratively with neighbouring areas to cross-promote key products and experiences, increasing dwell time and spend.

- Looking to audience specific insights, the study showed that Hertfordshire has a strong appeal among the family market, which presents an opportunity to promote the range of family- friendly activities and attractions, which will continue to be a key market. However, when it came to those who hadn't visited, this group were more likely to be younger couples, mirroring previous findings outlined in Hertford's quarterly footfall report.

- Whilst future visits will be fuelled by residents and repeat visitors, there are opportunities to better promote the range of events, attractions and experiences to attract new visitation and longer stays. Activity and developments around Hertford Castle and the BEAM Theatre present key opportunities to reach new audiences and further engage the local community.

THERE IS A NEED TO RAISE AWARENESS OF PRODUCTS AND STRENGTHS IN THE COUNTY THAT PEOPLE ARE LESS AWARE OF

HERTFORDSHIRE HAS STRONG APPEAL AMONGST YOUNG FAMILIESWHO VISITED PREVIOUSLY, FOR THOSE WHO HAVEN'T VISITED YOUNG COUPLES FEATURE

72% OF PEOPLE WHO HAVEN'T VISITED THE COUNTY WERE OPEN TO VISITING FOR A SHORT BREAK

SOCIAL IMPACT & LOCAL AUDIENCE

In a highly competitive domestic tourism landscape, it is critical that destinations look to understand their local audiences and foster strong links with local communities, businesses and other stakeholders, to develop vibrant places and communities. The impact of the tourism sector is felt significantly by local communities, with positive impacts. It helps to build pride in place, alongside involvement with local activities and advancing wellbeing and community cohesion.

Visit Herts has a strong focus on engaging the hyper-local market. The annual resident study, captures insights to better understand and track views on the impact of tourism and map out residents' leisure behaviour locally. It also helps identify the most efficient ways to target this audience and promote a great leisure offering to communities, in turn enhancing local wellbeing.

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 also be used to attract the skilled workers needed for our county to flourish. Easing the tight labour market and using effective place marketing to attract inward investment, helping to address key challenges and potential negative impacts. This data can be segmented to District level.

'IN A HIGHLY COMPETITIVE DOMESTIC TOURISM LANDSCAPE, IT IS CRITICAL THAT DESTINATIONS LOOK TO UNDERSTAND THEIR AUDIENCES AND FOSTER STRONG LINKS WITH LOCAL COMMUNITIES, BUSINESSES AND OTHER STAKEHOLDERS, TO DEVELOP VIBRANT PLACES AND COMMUNITIES'

Hertfordshire Annual Residents Study 2023: Key Findings

Investment, Transport & Infastructure

- Overall, results strongly demonstrate that local residents acknowledge tourism is a key catalyst for improving the local economy, in addition to providing employment opportunities and improving local investment, and the development of infrastructure spending.

- As highlighted in the Hertfordshire Local Transport Plan, there is a key emphasis on encouraging public transport use and active travel, alongside the necessity to influence behavioural change. The plan also highlights Hertfordshire's high levels of car ownership. While the county benefits from good south to north links, there are challenges around relatively poor east to west connections, in addition to congestion, rail overcrowding and availability of services in rural areas. These ambitions are also reinforced through the South East Hertfordshire Growth and Transport Plan, which references key challenges around traffic congestion and air quality issues, which is particularly prevalent in Hertford where the A414 runs through the town.

- Insights from the residents study show that **26%** felt local transport services are improving, with **52%** agreeing that local infrastructure such as public toilets, playgrounds, car parks, and foot and cycle paths had seen improvement. While these results do demonstrate positive perceptions around local investment and infrastructure, results also show that traffic and the availability of parking were key issues highlighted as top negative impacts of tourism. Moreover, these issues were also supplemented by responses that highlighted the need for transport infrastructure investment and better public transport solutions, that should be fed into relevant consultations and local authority teams.

- As modal shift and behavioural change are key focuses for local activity, it will be imperative to promote the use of public transport especially in areas with good connections, to ease the pressure on parking facilities and congested roads, alongside prioritising local infrastructure to further improve local communities' quality of life and wellbeing. Investment in active travel infrastructure is also key, as outlined in the sustainable Hertfordshire Strategy, which shows that those that walk and cycle are likely to visit the high street more frequently and generate a higher spend compared to those travelling via car.

68% agreed that tourism limits the parking spaces available to local people

26% of respondents felt that local transport services are improving

52% agreed local infrastructure such as public toilets, playgrounds, car parks and foot and cycle paths are improving

Results highlighted that traffic and availability of parking were key issues, and highlighted as top negative impacts of tourism

Local Preservation & Environmental Impact

- The study's results also show strong recognition among residents that tourism is a mechanism for generating income and that funding can be reinvested into initiatives to protect and conserve the environment. In support of this, **94%** agreed that tourism preserves historic buildings and monuments. A further **43%** agreed that tourism protects and enhances the natural environment.

- However, results showed that **50%** felt that tourism is harmful to natural emvironments like the countryside, and that footfall needs to be effectively managed to ease pressure on popular sites through visitor dispersal and promotion of lesser-known destinations. Open-ended responses also highlighted key challenges including litter and damage to public footpaths and wildlife habitats, with respondents mentioning the need to focus on ensuring sustainable development and educating visitors to respect the environment, through effective informational messaging.

- In addition, these insights and the importance of sustainable development really support the need for, and the potential impact of an insight-led sustainable tourism strategy that helps to address concerns and issues felt by local communities.

Quality of Life

- Interestingly, only a small percentage of respondents felt there were too many visitors in their local area (**10%**), with this decreasing to only **4%** among respondents originating from East Herts. Results also show that **58%** agreed they liked to meet visitors in their local area, however **52%** also cited that tourism increases prices for local services and amenities.

- This demonstrates that particularly in East Herts, visitor presence is not negatively perceived, however activity and local strategies should, particularly given the cost of living crisis, ensure that residents feel they are able to afford to take part in their local leisure offering. This could be achieved through resident incentives, discounts and priority tickets.

- Results show that respondents living in more rural areas exhibited a higher level of agreement with the statement 'I live in a beautiful area', which sat at **77%** for all respondents, rising to **90%** among those originating from East Herts.

- Findings also highlighted a correlation between responses to sense of pride and connection, with **83%** of respondents from East Herts feeling strongly connected to their local area, compared to **76%** among all respondents. Consequently, when looking at quality of life, respondents from East Herts were more likely to agree that their quality of life had increased, when compared to all respondents (**28%** vs. **23%**). This, together with previous findings highlight that overall respondents living within East Herts demonstrated a strong sense of pride and satisfaction with their local area.

Local Engagement

- In terms of footfall, respondents from East Herts were more likely to have observed an increase in visitors. Possibly due to a number of prevalent attractions including Henry Moore Foundation. Respondents from the district were additionally more likely to agree that the availability and local participation with attractions, leisure experiences and events had increased.

- By increasing residents' local leisure visitation and their satisfaction, this leads to an increased sense of pride in place and influences residents to act as ambassadors for the area. This may also help to aid the quality and volume of visiting friends and relatives (VFR), with **42%** of respondents indicating they have had friends and relatives to stay in the last year, with this increasing to **54%** among those originating from East Herts.

- In terms of travel intentions, results show that **46%** of all respondents intend to take more day trips within the county, with this being **8%** in the case of short breaks. Although residents will not be the main market for overnight trips, there is an opportunity to inspire overnight stays, through combining events with good quality offers and packages and more quirky experiential accommodation provision.

- As highlighted in the East Herts Climate Change Strategy, consumers often form opinions and make decisions based on views and advice from friends and family. This highlights the importance of resident consultation and collaboration with community groups. The sentiment is further strengthened through resident survey findings, which showed that local support and advocacy from friends and family are key, with 'recommendations from friends and family' sitting in the top three resources used to plan a trip locally. Here, results not only demonstrate the importance of local perceptions but also the importance of ensuring that both destination and attraction websites provide effective and inspirational information to local residents.

'BY INCREASING RESIDENTS LEISURE VISITATION LOCALLY AND THEIR SATISFACTION, THIS CAN LEAD TO AN INCREASED SENSE OF PRIDE IN PLACE AND INFLUENCE RESIDENTS TO ACT AS AMBASSADORS FOR THE DESTINATION'

- Residents identified **countryside, heritage, film & TV and food & drink** as the key attractions for their area. However, when asked about their own visits within the county, **retail** was the most selected activity, followed by **outdoor experiences, festivals and theatre**.

- Consequently, this strongly supports Hertford's offering in terms of **events & festivals** for local residents, alongside the ongoing developments around the **BEAM Theatre and Hertford Castle**, to further embed and create cultural opportunities for local communities. The development of the cultural offering, as outlined in the East Herts Cultural Strategy, aims to benefit the area economically and also act as a key driver for prosperity and community wellbeing; attracting more of the county's residents to explore the town.

- In terms of **VFR visits** the number one activity was visiting **historic destinations**, with historic **market towns** and villages topping the list, highlighting opportunities to showcase more of Hertfordshire's rural villages and towns. Results also highlight an opportunity to further develop the food and drink offer within the county, by working to increase the promotion and uptake of Hertfordshire **local produce,** 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.

- Mirroring opportunities outlined in the perception research, findings showed that **76% of respondents consider film/TV productions to be a strength for the county**. This creates opportunities for future product development and the positioning of this as a key strength and USP for the county. There are opportunities for Hertford and the wider district to engage further with the Hertfordshire Film Office to capitalise on post-production opportunities around new releases and also attracting further filming opportunities.

- Findings also show that **67%** of respondents agreed they access **green spaces for walking and cycling** more frequently when working from home, which significantly contributes towards improving residents' wellbeing and their connection to their local area. It will be important to continue to promote outdoor green spaces particularly within urban areas, which is further supported by the rise in GPs turning to social prescribing, through promoting active behaviour to patients to improve mental and physical health.

- Finally, results demonstrated that **newer residents** had a more favourable view of tourism's ability to attract local investment and infrastructure improvements, alongside having a stronger sense of pride and quality of life. As a result, this may indicate a key reason for **relocation to the area** which can be utilised to **entice prospective residents** and help to present Hertfordshire as an attractive destination to live and work, whilst alleviating the county's tight labour market.

AUDIENCES

To fully utilise a destinations' USPs to drive visitation and awareness, either locally or from further afield, there is a need to ensure that communications and activity are tailored to various audiences.

As destinations have the ability to attract a range of audiences, through effective targeting and tailored messaging, products can be packaged and presented to suit individual market preferences and shared via the right communication channels.

The following segments are taken from VisitBritain's MIDAS research, which present **five key audience profiles linked to inbound visitation**, these include information on travel preferences and behaviour, alongside common demographic attributes.

Here, strong links can also be made with key trends and Hertford's product offering, including some profiles' interest in engaging with nature and the outdoors, in addition to the preference for more urban locations, and the desire for experiential activities and embracing local culture.

ADVENTURERS

Likely to be more mature travellers, travelling off the beaten track, like spending time outdoors in nature and seek out new experiences.

EXPERIENCE SEEKERS

Tend to be a younger demographic and spontaneous and motivated by a desire to do as much as they can and grow as individuals.

EXPLORERS

Seeks authentic local experiences, nature and relaxation. The majority are aged over 55 years and are content to explore destinations at a relaxed pace, enjoying the outdoors, must see sites and embracing local culture.

SIGHTSEERS

Prefer to visit well known places in more urban locations, which are well planned. The majority are aged 55 and over and prefer to stay within their comfort zone and look for certainty and assurance.

CULTURE BUFFS

This segment is brand and image conscious, with the average traveller aged 37 years, with travel often being a status symbol and they like to visit well known, safe destinations.

INBOUND MARKETS

- When looking specifically at key inbound markets, the below table demonstrates the county's top international audiences by both volume and spend data, gathered through VisitBritain's 2022 International Passenger Survey.
- This shows that in terms of volume, top markets include the **Irish Republic and France, followed by the USA the Netherlands and Spain.**
- However, when considering **volume of spend**, the most lucrative market was the **USA**, with this contributing more than twice the amount of other markets. This was followed by the **Irish Republic and other European markets including France, Poland and the Netherlands.**

Overseas Overnight Visitors to Hertfordshire - National ranking by volume and value of visits

Top 10 nations by volume of Visits (000s)		Top 10 nations by volume of spend (£m)	
Irish Republic	59.2	USA	£36.77
France	45.7	Irish Republic	£17.78
USA	45.6	France	£13.63
Netherlands	27.9	Poland	£12.38
Spain	24.0	Netherlands	£7.95
Germany	22.2	Germany	£7.63
Romania	15.4	India	£7.36
Norway	12.1	Romania	£7.11
Poland	12.1	Sweden	£6.06
Sweden	11.2	Spain	£5.90

Source: International Passenger Survey - Hertfordshire, 2022

OVERALL, THIS CLEARLY OUTLINES KEY INBOUND MARKETS FOR THE COUNTY THAT CAN BE INCORPORATED INTO LOCAL STRATEGIES WHEN ATTRACTING INTERNATIONAL VISITATION.

AND HERE, IT WILL ALSO BE IMPORTANT TO CONSIDER A FOCUS ON HIGHER SPENDING MARKETS AS OPPOSED TO VOLUME, TO FURTHER ALIGN WITH SUSTAINABILITY GOALS AND REGENERATIVE TOURISM.

Hertfordshire Key Audiences

Visit Herts' marketing is targeted at four key audiences - social contemporary seekers, families, green spacers and hyper local. These audiences have been developed from national and local data, taking into consideration each audience's demographics, interests, decision making points and preferred media sources.

Hyper-Local

- Hertfordshire residents are a key focus and require a different approach to help encourage participation and connection with their local area. They are also our greatest ambassadors and support the crucial visiting friends and relatives market which accounted for 44% of visits in 2022.
- Here, it will be key to utilise local events and festivals to further create a sense of community and pride in place. Content should also look to showcase alongside other interest areas including retail, outdoor experiences, theatre, local produce and historic sites, which was particular popular as an element of VRF visitation.

Changing Family Dynamic

- As highlighted in the Hertfordshire perception research, the family market is already an established audience, with the county's product resonating strongly with this market.
- Therefore, this presents a key opportunity to further capitalise on this and promote the range of family-friendly products, activities and events available within the destination and inspiration for overnight stays.

Hyper-Local

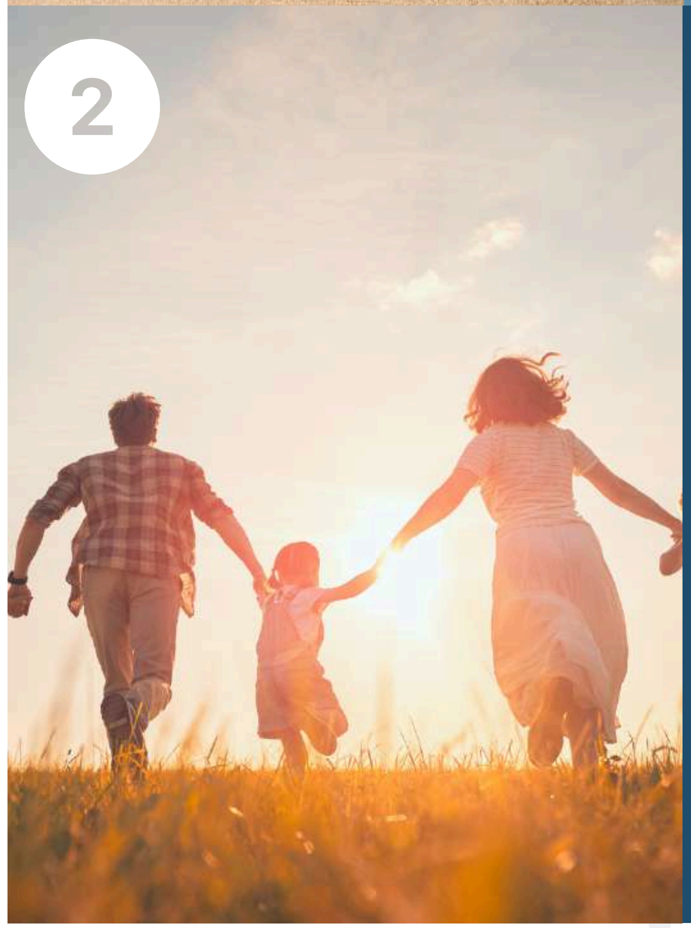
This market includes local residents and the VFR market and those that live in neighbouring areas.

Strongly driven by demand for stays closer to home following the pandemic and the increase to cost of living, with staying with friends and family offering a cheaper alternative to paid-for accommodation

Likely to be for a day trip or short break

Messaging should be centred around discovering local hidden gems and places that they may not have known existed, rediscovering what's on their doorstep, alongside tapping into their local pride, encouraging them to support local businesses.

Likely to look for unique accommodation and can include both planned and spontaneous trips given close proximity to the area.



Changing Family Dynamic

Families with children of various ages, including intergenerational and single-parent families. Here messaging can be tailored to those with older and younger children.

They look for child-friendly activities that are educational and hands-on and facilities for children are important. Likely to be more concentrated in the summer and school holidays.

Likely to look for family-friendly accommodation options, such as self-catering properties close to nature and near to planned activities and are likely to travel by car.

This can also include those looking for value for money, through incorporating inspiration on free things to do and low-cost catering options such as picnics. However, this can also include more affluent families from London looking for active and outdoor activities and local culture.

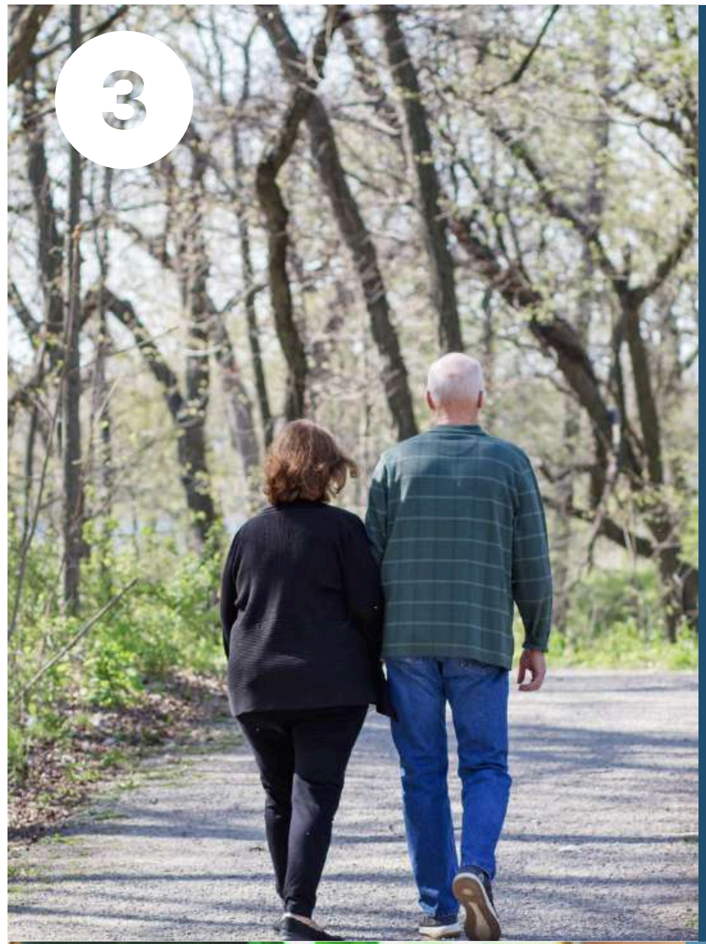
Key product strengths to draw on here will be the outdoor offering, wildlife attractions, family-friendly events and other key attractions.

Green Spacers - Traditional & Cultural

- With a strong mix of heritage, cultural and outdoor assets, Hertford will appeal strongly to the green spacers audience, with this market traditionally consisting of empty nesters.
- The combination of green spaces and heritage will be key when communicating with the more traditional side of this market, whereas additional influences from the BEAM Theatre, developments at Hertford Castle, and other cultural products will also appeal to the more cultural green spacer.

Social Contemporary Seekers

- As the younger audience is a potential growth market for the town, it will be key to further promote and develop activities and experiences that appeal to this market.
- Key strengths that may resonate with this audience include events & festivals, the farmers market and other food and drink activities, such as food events and brewery experiences. Activity should also look to tap into key trends around rest and wellness, and the outdoors when communicating with this audience, also unique accommodation provision and really communicating value for money and the prioritisation of experiential trips.



Green Spacers

Older couples traveling with a partner or part of a group, likely empty nesters and retired. Strong interest in nature, outdoors, National Trust, heritage, architecture and culture.

Product strengths around heritage and architecture will be a key draw, alongside visits to gardens and opportunities for walking, as well as key hooks such as market towns.

Likely to travel via car but public transport can be promoted and prefer to travel off-peak in quieter periods. Can also include coach groups.

Interest in pub lunches, afternoon teas and cafes and here local produce can be a key message, alongside other opportunities such as boating and events.

Can be split into those motivated more by the traditional outdoor offering and those looking for more cultural experiences. In this case, commonalities such as the outdoors can be packaged together with either more traditional or contemporary sites.

Social Contemporary Seekers

Predominantly millennials and Gen-Z, comprising of couples and small groups of friends pre-children. Also a fit for university students and young staff.

Likely to share their experience on social media so inspiration will be significantly driven by digital content.

Accommodation choices may include unique self-catering accommodation, Airbnb, and mid-range hotels.

Motivated by nature and the outdoors, including active activities and really driven by experiential tourism.

Will look for good value, and other trends such as the importance of rest and wellness will be key, in addition to positioning the destination as a retreat to escape more busy locations, but still offering some urban areas.

Key products that should be promoted include food festivals and markets, street food, breweries, local artworks, Instagrammable spots, outdoor activities and music events.

Business Visits

The business visits and event sector is a key opportunity market, covering a range of different areas including business tourism and meetings, incentives, conferences, and exhibitions (MICE), UKCAMS estimated that 1M conferences and meetings were held in the UK in 2022, recovering to 73% of pre-pandemic levels.

- According to VisitBritain, inbound business visits contribute significantly to the UK economy and were a source of **5bn** in spend in 2022. And although they tend to have a shorter length of stay, research shows that they spend more than double per night compared to the average visitor.

- Specifically, **22%** of inbound travellers in 2022 were MICE visitors, generating **29%** of total business spend and individually generating more than business travellers overall. Insights also show that MICE visits may be recovering faster, with the US being a top market source followed by key European markets including France, Germany and the Netherlands.

- Although business spend remains mainly focused in the capital, followed by the southeast and northwest, there is an opportunity to further capitalise on this in the East of England, with the region hosting **335,000** inbound business visits and generating **£178M** in spend in 2022. The areas also saw **33,000** MICE visits across the same period, generating a total spend of **£22M**.

- Looking at domestic business visits, VisitEngland's domestic overnight data highlights that the value of business visits saw a slight increase (up **1%**) in 2023, compared to 2022. Consequently, this growth opportunity is also supported by the results of VisitEngland's latest domestic sentiment tracker (July 2024), which showed that **16%** of UK adults plan on taking an overnight business trip in the next three months, with the leading reason being 'team building' (**31%**) and 'conference' (**30%**).

- In 2022, Visit Herts and the Hertfordshire LEP commissioned a report with SFW Connect. This presented insights relating to national and international meetings. The report looked to identity key target sectors, as well as key opportunities for the county to capitalise on the business events market.

- As outlined in the report, it is vital that destinations look to position themselves with a strong business case for hosting events, in order to successfully engage and attract potential buyers and event organisers. Findings included recommendations to prioritise conferences and events in a sector-led approach, which is crucial to identifying meeting and events opportunities for the county.

- Key sectors identified included - Life sciences, advanced engineering and manufacturing, environmental technologies, culture and creative industries/film making and Agritech. When looking at this further, of the top 250 opportunities outlined, 139 were from the field of advanced manufacturing or life sciences, potentially due to the presence of various research facilities, local experts, and their multidisciplinary teams in Hertfordshire research institutions.

- According to the Hertfordshire Film Office, over £6.4 million was spent on high-end TV and feature film activity in Hertfordshire in the last financial year, with £5.2 million estimated local spend generated from film & HETV and smaller productions in Q1 & Q2 of 2023. This, together with 22 locations in East Herts included on the film office's location database, clearly demonstrates opportunities around film cast and crew around business visitation and it's potential contribution to the local visitor economy.

- Insights also included recommendations to prioritise national opportunities, with these being more likely to be attracted to the county, compared to an international business audience, alongside a focus on regular and frequent meetings such as those that are annual and biennial. In terms of capacity, the report highlighted that a significant proportion of opportunities attract an average attendance of 50-100 delegates, so ensuring venues locally can cater to this capacity will be key.

- Overall, there are significant opportunities around business visits, that Hertford can tap into, which is further supported by the results from the Hertfordshire Cambridge Model, with the increase in visits also being driven by the return of business travel, which accounted for 16% of trips and 25% of total value generated. When combined with the range of cultural, heritage and tourism attractions in both the county and Hertford, business travel length of stay can be increased to further enhance secondary impacts to the local economy. This is also a catalyst for attracting investment, collaboration and demand for infrastructure investment.

'INSIGHTS HIGHLIGHT AN OPPORTUNITY TO CATER FOR THE BUSINESS TOURISM AND MICE MARKET AND TO CAPITALISE ON OPPORTUNITIES AMONG THE INCENTIVE AND CORPORATE MARKET, ALSO TAPPING INTO DOMESTIC BUSINESS VISITS, PARTICULARLY AROUND TEAM BUILDING AND WELLBEING ACTIVITY TRENDS, ALONGSIDE BLESIURE & REMOTE WORKING. ACCORDING TO VISITBRITAIN, MMGY GLOBAL HAVE PREDICTED THAT IN PERSON MEETINGS WILL BE MORE POPULAR OVER THE NEXT TWO YEARS AND THAT SUSTAINABILITY WILL FURTHER GROW IN IMPORTANCE FOR BOTH PLANNERS AND ATTENDEES.'

PRODUCT MAPPING & OPTIONS ANALYSIS

This section looks to outline and map Hertford's key product strengths, identifying key assets, alongside various opportunities and gaps for further product development, to help increase footfall and spread of visitors across the area, whilst maximising visitor spend.

These insights will also help to inform actions and priorities identified through a subsequent SWOT analysis that will be integral to the development of the strategy and inform stakeholder discussions. This exercise can inform future work aimed at increasing the awareness of the destination, outline key USP's and opportunities, and ultimately encourage longer stays and repeat visits.

The following diagram looks to thematically map Hertford's product offering, and outline examples of attractions, activities, and experiences within each of these themes.

KEY PRODUCT STRENGTHS & USP'S

POTENTIAL PRODUCT DEVELOPMENT OPPORTUNITIES

PRODUCT GAPS

Countryside & Nature

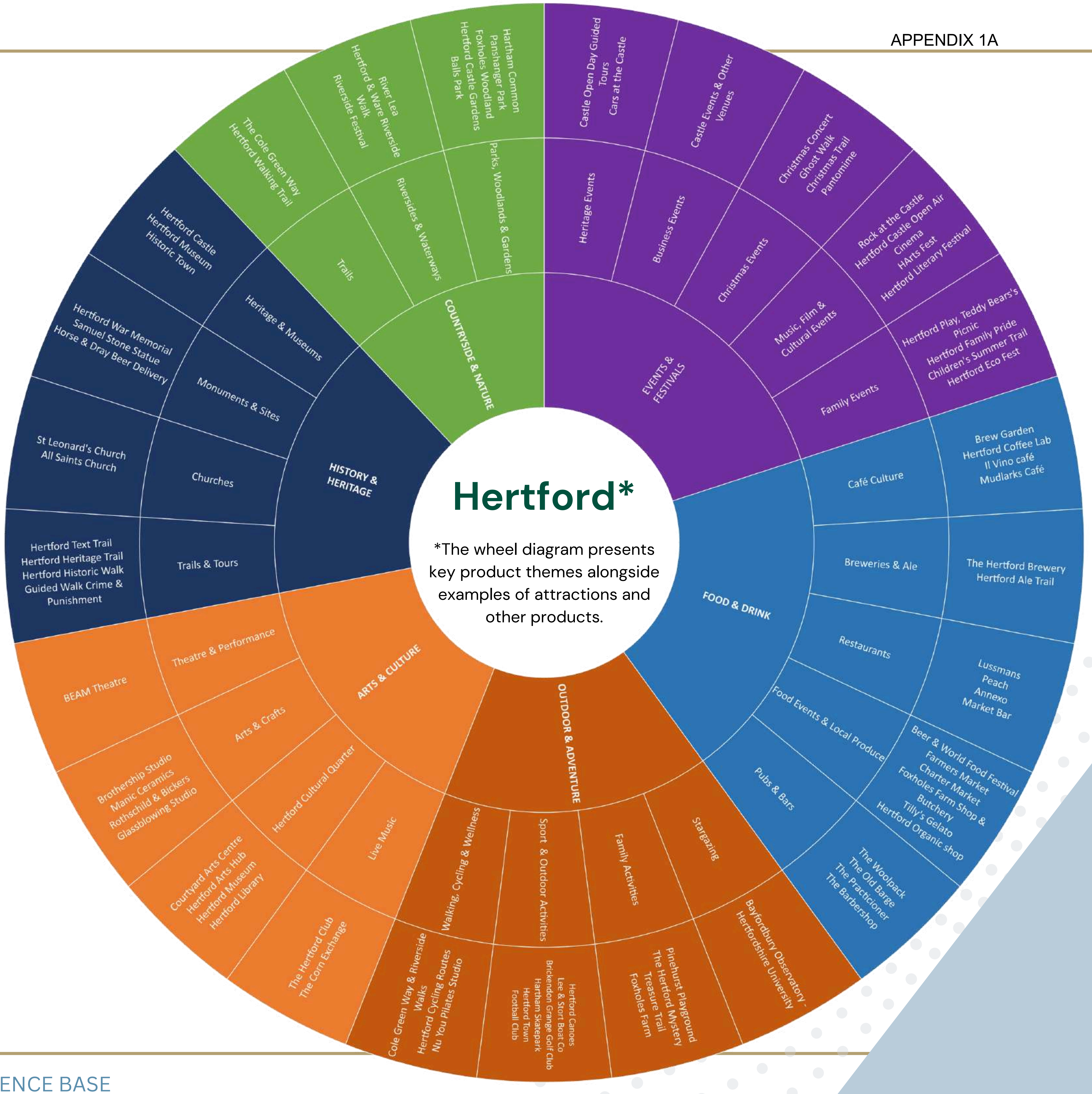
- The town and surrounding area have a strong offering in terms of countryside and the natural environment. This includes Panshanger Park, Hartham Common and the Riverside, plus a number of trails and the Hertford Castle gardens. These give visitors and residents access to urban and rural green spaces, with a choice to stay within the town or venture a little further afield to explore the outdoors.

- There is a real opportunity to further capitalise on the great natural landscapes and countryside available, through linking with key national trends such as those that focus on rest and wellness and consumers looking to immerse themselves in nature and the outdoors.

- There is also an opportunity to position Hertford as a hidden gem and as an up-and-coming destination, which looks to offer visitors an escape from busier destinations, to one that offers a quality experience of the outdoors, nature and riverside views.

- In terms of USP's Hertford Castle's gardens and the river in a more urban setting appeal strongly, allowing a perfect mix of an historic town offering, with elements of nature and the outdoors. Sites such as Panshanger Park and other outdoor areas with a strong sustainability message may also be a key draw, such as the tree planting project to create a memorial to Queen Elizabeth II, and the range of different species and diverse woodland available. These strong royal historic connections with the outdoors will also be a key draw.

- When it comes to nature, this appeals to a range of audiences, including green spacers and younger visitors, so it's key to ensure that messaging and content are tailored to appeal to each audience's preference. In addition to attracting visitors from further afield, promoting the range of urban and rural green spaces is key within the community, helping to contribute towards improving wellbeing and quality of life, including work as part of the Hertford Castle Greenspace Renewal project.



Outdoor & Adventure

- Due to some of the great landscapes on offer, the area has key strengths in outdoor activities and opportunities for adventure, such as walking, cycling, and sport and leisure activities. This includes canoeing, golf and the football club.

- The town's outdoor provision links strongly with national trends around wellness and nature, along with an appetite for exploration and experiences within destinations that are sustainability conscious and looking to make a difference, many visitors will want to contribute towards this further.

- With a number of walking and cycling routes and outdoor family-friendly activities, this appeals to a range of audiences, including the family market, empty nesters and younger visitors, with the latter looking for more experiential and adventurous offerings.

- There may also be further opportunities to capitalise on the riverside and water-based activities. These are a great asset for any destination, presenting opportunities for a variety of boating activities.

- As a destination with some fantastic dark skies and the observatory at Hertfordshire University, stargazing could be another strong USP for the destination. This connects with additional developing experiential tourism which can be packaged with the outdoor offering and unique accommodation. This can be aligned to other key events such as Dark Skies Week and sustainability topics such as light pollution.

History & Heritage

- The town's history and heritage is clearly a strength for the area, with historic market towns and heritage attractions being a key draw for both international and domestic visitors, alongside and the hyper-local audience, particularly in term of VFR visits.

- Hertford Castle combined with other sites can be packaged nicely with the various trails and historic walks that are available. Here, there are also opportunities to tap into more specialist interest areas for example key churches, American links with Samuel Stone, and further capitalising on the castle's royal connections. In addition, showcasing assets such as the Horse and Dray beer delivery offers something unique and promotes the town's brewing history and local produce.

- The strong heritage offering particularly around Hertford Castle and its upcoming developments plus the town's historic buildings and architecture have great appeal. By focusing on a joined-up partnership approach, key heritage attractions such as Hertford Castle can be used as hooks to be packaged together with other products, creating inspirational itineraries, assisting with visitor dispersal and increasing dwell time.

Arts & Culture

- With the recent investment and potential growth opportunities around the BEAM theatre, another key product theme for the town is its arts & culture offering.

- The town's cultural quarter and heritage offering, contribute to Hertford being a destination that offers both a traditional and contemporary cultural scene, including galleries, museums, live music venues, performance and art and cultural events.

- This offering can be utilised to appeal to a younger demographic and cultural green spacers, this will create a strong cultural identity for the destination centred on the cultural quarter, especially given the upcoming developments as part of the theatre.

Food & Drink

- Currently, the town has a great range of pubs, cafés and places to eat, alongside a strong representation from the farmers market, the brewery and the town's brewing heritage. Given these strengths and the growing appeal and demand for culinary experiences and local produce, there are considerable opportunities to develop this within Hertford to position it as a foodie destination.

- To facilitate this, it will be imperitive to champion local produce and producers, and to push the food and drink offering to the forefront of consumers' minds when they think of the destination. This can be achieved by highlighting activities such as food events, markets and farm shops. There should also be focus on sharing strong feature content on food and drink within the destination and recommendations; such as purchasing local produce to enjoy as part of a picnic within the district.

- With a great choice of both traditional pubs and more contemporary bars, there are also opportunities to further develop the night time economy, packaged with quality food options, and also pre-theatre dining.

- The town's food and drink offering can also be moulded to suit various audiences' needs, from those looking for more traditional pubs and ale trails to bottomless brunches and food experiences that may appeal more to the younger audience.

- Although there is currently a good range of walks and trails centred around heritage, there could be opportunities to create more local produce based tours, experiences and self-guided itineraries. These could look to utilise existing products such as the campaign for real ale guide and events such as Microfest at Hertford Museum and Oktoberfest hosted at Hartham Common.

Events & Festivals

- Events & festivals are also a key product theme, ranging from food & drink events such as beer festivals and farmers markets, to Christmas events and art festivals.

- Events not only offer a way to attract visitors both locally and from further afield, but they can also extend length of stay, and can be promoted alongside overnight stays, with quality accommodation and other destination elements such as the great range of retail options and independent shops.

- More unique events will also help to further differentiate from other destinations and to create a clearer identity that may also appeal to different audiences, including the open air cinema at Hertford Castle, Christmas ghost walks and Eco Fest.

- A strong year round events offering will also help to disperse visitors throughout the year and help to increase off-season visits in the shoulder seasons, which can also be aided by using key milestones and occasions such as Halloween, Christmas, new year walks/wellness and springtime events.

CASE STUDY: Visit Malton

Visit Malton's local produce offering has transformed it into Yorkshire's food capital, but how did they achieve this level of food & drink offering which has attracted visitors and journalists every year?

To put it simply, Malton's picturesque natural landscape is abundant with a wide variety of local produce. Realising the breadth of the natural resources surrounding the Yorkshire town, Visit Malton decided to champion local produce and make it the town's unique selling point that would transform it into the destination that is widely known today.

This opened up local producers and local hospitality businesses to several opportunities which led to the town's rejuvenation:

- **Local producers lowered the cost for hospitality businesses.**
- **Supply chains were localised leading to reduced food miles.**
- **A better seasonal produce offering which hospitality businesses can use to create seasonal menus and continue to support local producers all year round.**
- **This all supports the local economy, contributing to the town's economic growth and job creation for the local community.**

Now, when visitors explore the streets of Malton, they discover a **new local foodie experience** around every corner including, local beer, fresh fish, ice cream, roast coffee and everyone's favourite: macarons! And it doesn't stop there, Malton's **regular food markets** and biannual Food Festivals – one of which **(Food Lovers Festival)** attracts around 30,000 visitors every year – fill up the town with new artisanal flavours and fragrances throughout each year. For those feeling a bit overwhelmed by the number of choices available to them, **Malton's food tours** and a comprehensive itinerary of the town and its surroundings are also available to visitors, ensuring that every aspect of Malton's culinary experience is fully explored by as many visitors as possible.

Malton has also saught to boost its sustainability credentials by striving to become **the first circular economy town**, with several innovative projects underway. For example, **Ryedale Remakes** aims to become a hub for upcycling and reusing unwanted items. On the other hand, the **Free Fridge Network** has asked all local food businesses and allotment holders to donate surplus food so that it may be shared with the local community at no additional cost, lowering the overall amount of food wasted every year.

Malton's success in championing local produce is an excellent example for other destinations to follow and many lessons can be learned from it. The keys to creating such an experience rely first and foremost on the support given to local SMEs. Then, creating a collaborative environment by connecting local producers to local hospitality businesses, supporting local produce all year round with seasonal menus and potentially increasing the number of local producers. Furthermore, their success can be showcased by taking part in food festivals where both can showcase their produce and culinary offerings to inspire visitors and businesses alike. Finally, businesses are given the flexibility to innovate by allowing them to come up with sustainable projects or collaborate to create food trails, ensuring visitors feel happy and satisfied when they leave the destination.

Now, when visitors explore the streets of Malton, they discover a new local foodie experience around every corner

SWOT ANALYSIS

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Glossary

VRF - Visiting Friends and Relatives
SWOT – Strengths, Weaknesses, Opportunities and Threats
USP – Unique Selling Point
MIDAS – Motivations, Influences, Decisions and Sustainability Research
GDS – Global Destination Sustainability
MICE- Meetings, Incentives, Conferences, and Exhibitions

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Hertfordshire Climate Change and Sustainability Partnership
Hertfordshire Growth Board Vision and Missions
Visit Herts Destination Management Plan
Visit Herts Sustainable Tourism Hub
Chamber Herts Go Green and Grow
Hertfordshire Local Transport Strategy
Hertfordshire Active Travel Strategy

East Herts Cultural strategy
South East Hertfordshire Growth and Transport Plan
Healthy Hub East Herts
East Herts Health and Wellbeing Strategy
East Herts Climate Change Strategy
East Herts Environmental Sustainability Action Plan
Sustainable Community Strategy East Herts

Hertford BEAM Theatre Strategy
Hertford Refill Campaign
Hertford Castle Lottery Project
Hertford Eco Audit Report

HERTFORD TOWN COUNCIL

GO TO PLACES
Bringing people together, helping places thrive

VISIT HERTS