

HERTFORDSHIRE SCREEN TOURISM

PRODUCT AUDIT

MARCH 2021



The following product audit will review:

- ✓ Key insights highlighting the value of screen tourism.
- ✓ Growth of film & TV production.
- ✓ Screen tourism potential for Hertfordshire.
- ✓ Strength of the studio and location offer for Hertfordshire.
- ✓ A detailed look at the current film and TV locations that can be utilised to build a screen tourism product.
- ✓ Positioning screen tourism as a USP for Hertfordshire and the key themes to build on.
- ✓ The opportunity for product development.

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creative
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Filming
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The power of pop culture for a destination

As we emerge out of lockdown, the one thing we can all be sure of is that we have watched a lot more digital content over the past 12 months.

Subscriptions to digital streaming networks have rocketed and new dramas such as Bridgerton have broken records of all viewing audiences. Blockbuster films have moved direct to home release and the likes of Amazon and Netflix are now commissioning more content than ever, using the back drop of Britain's heritage to set the scene.

With one in five tourists being influenced by what they have seen on screen in their destination choice, there has never been a better time for UK destinations to capitalise on the buzz of film and TV locations.

Screen tourism also offers a destination the opportunity to reach more illusive consumer segments, encouraging a younger audience to seek out landscape and heritage locations and enticing international visitors to go off the beaten track.

Internationally acclaimed dramas such as Game of Thrones or Stranger Things are leading us to buying retro clothing and exploring abandoned castles in Northern Ireland. Before, screen tourism focused on just visiting the actual destinations where a drama or film was shot, but now consumers are searching for a more immersive experience.

With Hertfordshire's unique position as a base for the UK's leading studios; multiple film locations and the home of Warner Bro. Studio Tour London 'The making of Harry Potter', the county is clearly positioned as a 'must experience' destination for the film and TV fan.



The Strength and Demand for UK Film & HETV Productions

Sector Resilience

For many sectors, the impact of the Covid 19 pandemic has impacted many tourism businesses who are looking to diversify their products to bring in additional revenue streams to survive. BFI figures released in February 2021, revealing the film and HETV UK production spend for October-December 2020 was the third-highest on record. Due to a swift industry response to set production guidelines, UK based productions such as The Batman (Warner Brothers) were able to continue.



Demand has never been higher as the global viewing audience although absent from movie theatres, have consumed terrestrial and subscription content with such zeal during lockdown that channels have struggled to meet the demand brought about by 'binge watching'.



The Bridgerton Success Story:

- ✓ 82 million viewers
- ✓ Period drama
- ✓ Filmed across the UK
- ✓ Pop culture phenomenon
- ✓ Netflix's biggest series ever!

The Growth of Subscription Based Streaming

10 years ago, Netflix was mailing us DVDs in the post. In 2013 they streamed their first original content (*House of Cards*); today they are one of the largest content commissioners and number one network in the world. Right now, the demand for UK film and drama content has never been greater. In 2020, HETV surpassed film production investment for the first time.

Network	Subscribers/ viewers	launched
NETFLIX	190 million	1997
Amazon Prime	150 million (112m in US)	2007
Disney +	60.5 million	2019
PBS/ Masterpiece	63.7 million viewers per month	1971
Apple TV	40 million	2019
Hulu	28 million	2008
Sky	23.8 million	1989
HBO Max	4.1 million	2020
Britbox	1.2 million	2017
Acorn TV	1.1 million	2011



Why is Screen Tourism a Winner for the UK?

National Context:

Research undertaken by Creative England in association with VisitEngland indicates that tourists will travel to sites specifically because it has been featured in a film or TV Drama (Creative England and VisitEngland, 2014).

Notably, this is an increased motivator for the international tourist, with 36% surveyed stating that screen production was a primary motivator for visit, compared to 11.6% of domestic visitors (BFI, 2021).

- International core screen tourism is valued in the range of £100- £140 million for England (Excl. London).
- Research indicates that the longer a site benefits from clear recognition exposure, the more likely it will result in screen tourism activity: E.g., Highclere Castle – Downton Abbey; Castle Howard – Brideshead Revisited; Falkland (Doubling for Inverness) - Outlander
- Film and TV can be a great way to advertise a destination to millions of potential visitors, whether that results in short term bookings or planting the seeds of long-term aspiration to visit. (As seen with Lord of the Rings and New Zealand).
- A variety of genres can also position the same destination to multiple audiences, so broadening the appeal of a destination. E.g., Royal Naval College, Greenwich – Les Misérables, Pirates of the Caribbean, and Thor.
- Combining the appeal of Screen Tourism with the development of immersive visitor experiences holds huge appeal for both a domestic and international audience as seen with the huge success of Warner Bros. Studio Tour London - ‘The Making of Harry Potter’.

The winning ingredients for the UK

Heritage is the number one top reason for visiting Britain. Any TV/ film product that tells a historical story has a connection with the inbound audience – e.g. The Favourite, The Crown.

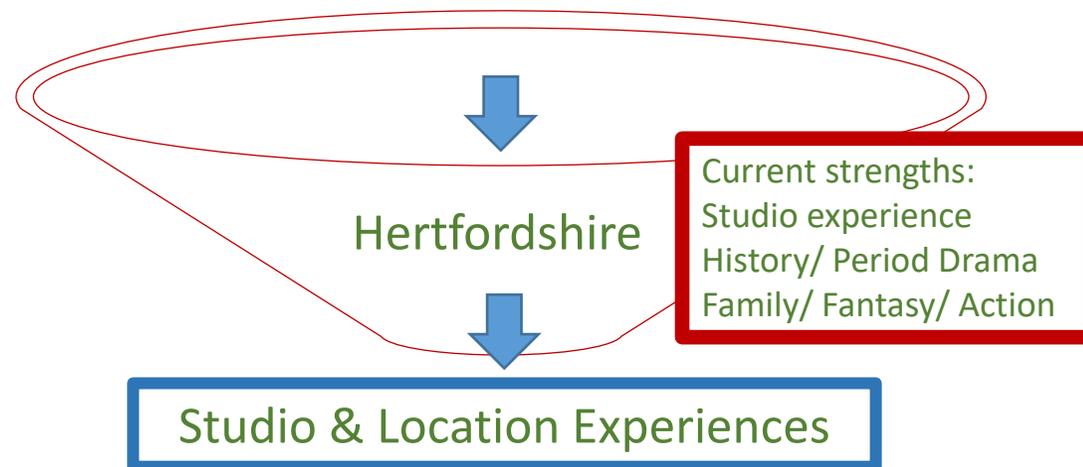
Real Life/ True Stories – specifically in period e.g. Dunkirk/ Elizabeth/ Imitation Game/ Call the Midwife.

The **‘Literary Greats’** brought to life e.g. Pride & Prejudice/ Miss Potter/ Harry Potter/ Shakespeare in Love.

Crime & Contemporary – Sherlock (both Film &TV) Enola Holmes/ Broadchurch/ Morse/ Grantchester/ Lewis.

Escapism - Fantasy, Syfy, Action, Adventure e.g. Wonder Women/ Batman Returns/ Fantastic Beasts.

Family Appeal – Harry Potter/ Paddington/ BFG/Maleficent



Why Hertfordshire?

Background

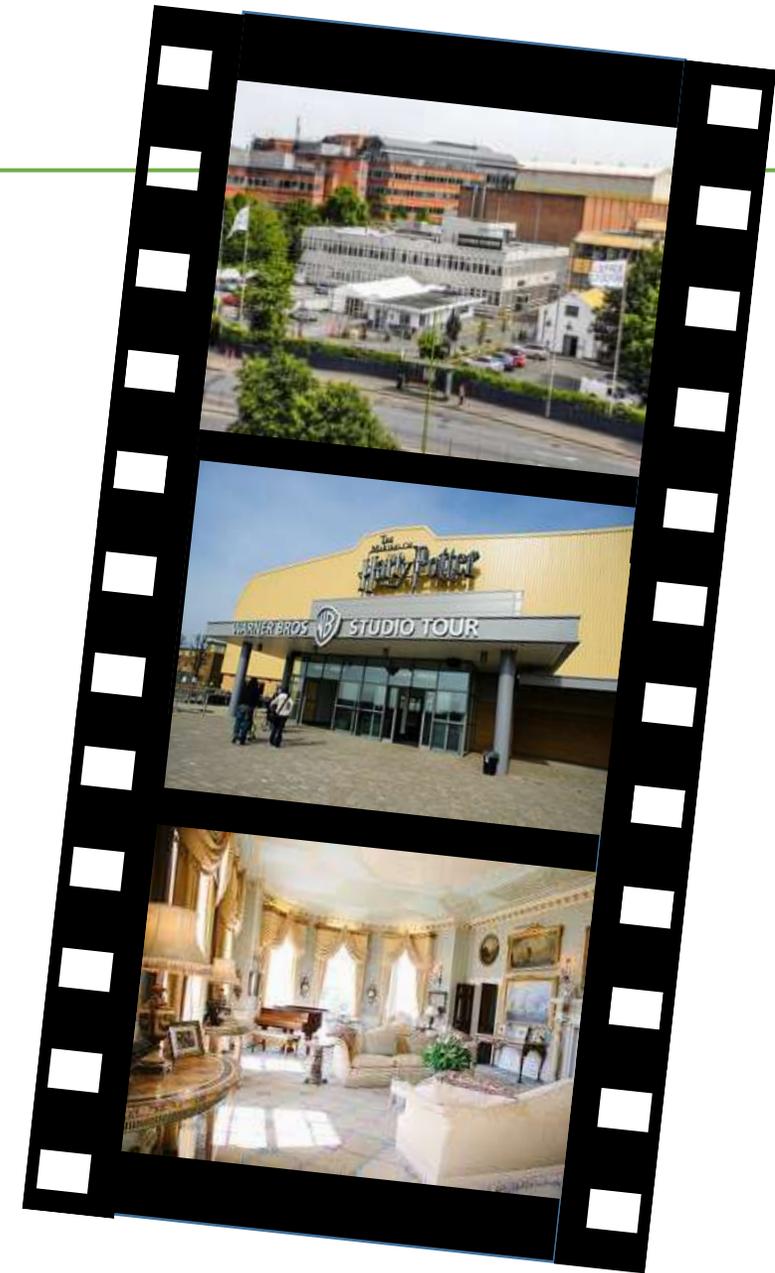
Hertfordshire is home to world-class studios, delivering internationally acclaimed film and TV productions from Harry Potter to The Crown. The county is home to Warner Bros. Studios Leavesden, Elstree and BBC studios with additional investment from Sky to locate at Elstree launching 2022.

Location filming across Hertfordshire contributes significantly to the local economy with £20m spent in 2016/2017 (Creative England & VisitEngland, 2014).

More recently, key locations have featured in films such as The Favourite (2018) and TV productions such as Bridgerton (2020 Netflix), continually raising the profile of Hertfordshire locations as a preferred choice for production.

For Visit Herts to capitalise on the opportunities around screen tourism there is a need to focus on four key areas that will help to position the area for future production opportunities as well as establish a USP as a screen tourism destination:

1. **Local Sector Partnership** – Working with the creative sector and supporting tourism partners to help them capitalise on the opportunities from screen tourism.
2. **Support** – The development of ‘how to’ information guides to inform and guide tourism partners on how they can capitalise on ‘screen business’ from facilitating filming to harnessing screen appeal to support their marketing.
3. **Lead role** for Visit Herts to turn screen tourism into a **destination USP**.
4. **Product development** – Building and sustaining relationships by working in partnership across the tourism and non-tourism sector to create extension product. This could be via the development of itineraries and suggested weekend breaks combining location and studio visits with immersive dining or even escape room experiences.



The USP Value of the Studios for Hertfordshire

Behind the Scenes

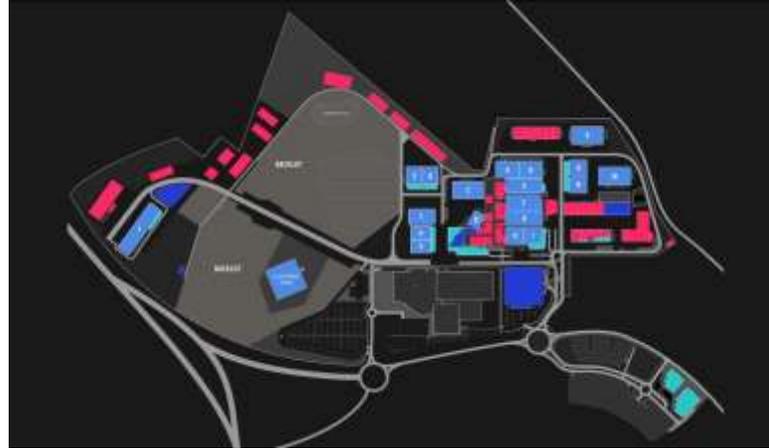


Since opening in 2012, The Warner Bros. Studio Tour London - *'The Making of Harry Potter'* has consistently been ranked as one of the UK's top attractions. Welcoming on average 6,000 visitors a day – roughly 2 million a year (*pre-Covid*), this immersive experience generated almost £133million for the studio in 2019.

Ranked as one of the top attractions for international visitors to the UK, the studio tour is a bedrock component for the travel trade, featuring as a stand-alone excursion or as part of a wider package to the UK.

There are opportunities to extend this visit to additional locations, creating a short break offer.

State of the Art Facilities Built by Filmmakers for Filmmakers



Warner Bros Studios, Leavesden offers 350,000sq ft of stages with 100 acres of backlots, extensive facilities and globally renowned expertise. **Elstree Studios** is home to some of the best-loved TV shows from *The Voice* to the internationally acclaimed series, *The Crown*.

The 'stand out' expertise of the Hertfordshire based studios, continues to fuel the screen tourism opportunity for the wider area. There is also ongoing investment and attraction for the development of two new facilities – Sky and Hertswood Studios which is going to become the largest studio in the UK.

Audience Experience = Visitor Experience

Visitors are continually looking for new experiences as part of their travel mix. As audiences start to return to the studio, there is an opportunity for closer working relationships between the creative and tourism sectors to package and promote the studio experience, as an overnight stay/ dining/ TV experience.

To support increasing audience participation and the development of studio experiences, there are new partnership opportunities with companies such as Applause Store and SRO Audiences.



Why Screen Tourism is an Opportunity for Hertfordshire?

Building on the Strengths

Two established studios and two new studio developments scheduled, one the largest in the UK.

The **UK's number one film tourism attraction** with international recognition.

Connectivity to London.

A strong backlist **of internationally recognised** films.

Partnerships – destination management, creative industries, travel trade, public and private sector support.

Screen tourism is a UK strength – from production to destination recognition.

Capitalising on Opportunities

Capitalising on the strength of Hertfordshire's studio presence. **Building a USP for screen creativity and destination experience.**

Product extension – development of extension tours to complement Warner Brothers Studio Tour London – 'The Making of Harry Potter' experience offer **working with the travel trade.**

Strengthening partnerships – working closer with Creative England to **promote the destination profile for locations and visits.**

Two-way support – raising the profile of the creative industry offer and destination experience to leverage additional funding bids.

Areas for Consideration

Competitor UK destinations that are offering studio facilities and an abundance of 'accessible' locations, for example:

- Bottle Yard – Bristol (Sanditon)
- Church Fenton – Leeds (Victoria)
- Longcross – Surrey (Call the Midwife)

The need for **long term commitment** – (planning, pre-production, production, post-production & distribution... can take years).

Understanding the needs of the production industry and where the destination plays a part.

Raising the awareness of the benefits of screen tourism.

Hertfordshire Screen Tourism Strengths & Opportunities

The film and TV location audit (appendix 1) clearly highlights four key genre areas based on released material and three key areas to not only encourage extension of stay, but to also extend the tourism season through screen tourism product development.

Released Material/ Location Visits:

Most notably, it is the strength and versatility of Hertfordshire's heritage and landscape product which features across all genres, highlighting that screen tourism offers the opportunity to engage a wider visitor /audience base. The locations can offer period representation as we have seen with *The Favourite* and *Shakespeare in Love*, but can equally appeal to a fantasy/ syfy audience base as key locations used in both DC films and action-adventure products such as *Tomb Raider*. The destination opportunity is to use the different genre films to target key audience/ visitor segments, encouraging repeat visits or breaks through to new customers.

The Appeal of the Studios

Audiences and visitors are increasingly looking for experiences rather than tick-list sight seeing. Therefore, a behind the scenes glimpse of film and TV has a huge appeal. Whether it's visiting Warner Bros. Studio Tour - *'The Making of Harry Potter'*, or becoming a member of a studio audience, there is an opportunity around raising the profile of Hertfordshire as a wider film and TV destination offer to encourage overnight stays.

Product Development

Due to the breadth of films in production from the studios, there are many product development opportunities. Themed events, both consumer and corporate; working with the travel trade and exclusive travel planners to create unique experiences. Not only will this encourage extension of stay, but also the extension of the traditional tourism season.



A Destination's Strengths Brought to Life on Screen

History and Heritage – The Power of Period Drama

Hertfordshire offers a strong heritage product on the doorstep of the studios. Proximity, ease of access and architectural quality, deliver the historical and believable settings that the target audience now demands from a UK film/ TV period drama. Due to the strength and breadth on offer from Hatfield House, Knebworth House and Brocket Hall, they are continually used to deliver an authenticity that underpins high-end productions.

From the film and TV audit (Appendix 1), it is clear that the heritage locations have a high audience recall across all genres but benefit greatly from period/ historical productions as these generally showcase more of the property to reinforce the storyline. E.g. *The Favourite*.

Findings from the VisitEngland/ Creative England report (2014), show that screen tourism has a greater resonance with international visitors; 33% said they visited key sites triggered by a film or TV drama compared to just over 7% domestic. All the sites where visitors were surveyed were known for period productions.

With the rapid growth of the subscription-based channels throughout 2020, there is an increased demand for a 'tried and tested' formula that resonates with the customer. Period dramas have long been a successful model for established channels such as PBS, where the 'masterpiece' brand sits behind so many of the UK's most loved series. Now Netflix and Amazon are both reaping the benefits from commissioning both UK period films and TV, highlighting this genre as a growth potential for Hertfordshire.

There are 53 new British period dramas already scheduled in 2021 from Grantchester 6 and All Creatures Great & Small 2 (Masterpiece/ ITV/ C5), to Bridgerton 2 and The Irregulars (Netflix), also 37 period UK films. E.g. The Dig, Mothering Sunday and the Kings Men (British Period Drama's, 2021).



A Destination that Offers Escape to Another World

Adventure/ Fantasy and Family Fun

Due to the internationally recognised film making facilities at both Leavesden and Elstree, the studios attract a considerable amount of fantasy, syfy and action film productions. As a result, local locations are increasingly used to support the storyline.

This type of location use often results in locations featuring as 'location stunt doubles' for example, Hatfield House interiors as a French chateau in Wonder Woman or Knebworth as Wayne Manor.

Hertfordshire's unique position, is that the fantasy experience is brought to life by the Warner Bros. Studio Tour London - 'The Making of Harry Potter'; there is an opportunity to encourage visitors to extend their stay in the county through visiting other locations that have been used to bring this genre to life.

This genre brings huge benefits to a destination in the recognition and interest from a younger audience profile. Traditionally, superhero film audiences are skewed towards a younger male 18-25 audience base with the average box office gender split being 62% male. However, new films such as Wonder Woman have challenged this audience profile delivering a 50/50 audience gender split and winning over segments that would normally opt out of superhero films e.g. women over 50, resulting in the film being a huge box office success. *(see Appendix 1)*

Couple this with fantasy films such as Harry Potter/Fantastic Beasts and new productions such as The Batman; Hertfordshire can harness the appeal of these films to a Gen Z/ Millennial audience to entice first time visitors to consider the destination.



The Great British Addiction that Benefits the Destination

Crime, Mystery, Thriller, Action

The UK benefits from a longstanding crime genre strength thanks to acclaimed writers such as Agatha Christie and Sir Arthur Conan Doyle, who brought to life 'winning formula' characters that appear again and again on both the big and small screen.

The Sherlock Holmes appeal has more recently been extended further with the success of the Netflix commissioned *Enola Holmes*, and the soon to be released 'The Irregulars' (Netflix).

Although Hertfordshire has attracted a good selection of film product from this genre, the notable benefit for a destination that has a greater association with a TV Drama with endless destination examples is the popularity of crime drama tours e.g. *Morse*, *Endeavour* and *Lewis* for Oxford, *Broadchurch* for Dorset, *Sherlock* for London and *Vera* for the North West. This is also a genre that seeks out less popular/ out of the way destinations, as seen by the recent drama successes of *Shetland* and *Hinterland* (Wales).

Why are they so popular with visitors? The TV Drama develops a long-standing relationship with the viewer along with greater loyalty to not miss an episode due to plot twists and vital information delivered for the audience.

What does this mean for the destination? Research shows that the audience pays more attention to the content, taking in the detail, which inevitably leads to greater destination recall.

This genre in particular offers a great opportunity to develop experiential product i.e. murder mystery weekend, escape rooms, murder mystery detective trails.

For the destination, there is also a great opportunity for properties to offer new filming locations. For example, the production of *The Irregulars* was filmed in a disguised area of estate buildings and servants' quarters of Wentworth Woodhouse which was used as a double for Victorian London.



Opportunities for Product Development in Hertfordshire

Actual Location Visits – This can either be direct to the studio location, such as Warner Brothers' Leavesden Studios or visiting an instantly recognisable location such as Highclere Castle (*Downton*) or Liverpool and the Black Country Living Museum (*Peaky Blinders*). There is also the opportunity for exclusive visits for small VIP groups to go behind closed door areas or to non-tourism sites - such as Keeley Hire Co. as featured in Stardust.

Immersive Experiences Based on Film or TV – A Secret Cinema production can attract over 120,000 people paying £50-£100 a ticket. The most recent production, 'Stranger Things' required additional dates to meet demand, running from mid-November to the end of February 2020, highlighting that experiences can drive demand regardless of seasonality. 2020 has also seen the growth in popularity of the drive-in movie experience, which could offer a great opportunity to actual film locations to screen their back catalogue of films.

Organised Events – Bridgerton only launched onto our screens in December 2020, however, dining and social events based on the theme are already scheduled and selling fast for 2021 pending Covid restrictions.

2020 saw huge interest in drive-in movie venues across the UK; a great example for Hertfordshire was the collaboration between the Bollywood Company and the UK Asian film festival to bring a sell-out Bollywood classic event programme. This targeted event approach offers a fantastic opportunity for Hertfordshire to raise the film destination profile; offering the local community a great product and tap into the county's considerable domestic and international VFR appeal, especially as India is the fifth highest spending market for Hertfordshire.



Drive in movies @Sandohall – Staffordshire
Bridgerton Events – Asher Entrainment
Peaky Blinders Tour @britmovietours
Secret Cinema – Star Wars

Opportunities for Product Development in Hertfordshire

Dining Experiences – Increasingly research shows that visitors (60% for the UK domestic market) will choose a destination based on the bookable experiences available. Quite often it is the experience that encourages the extension of stay through exclusive/ themed or unique location dining experiences which are increasingly popular and offer a great opportunity to link to film/ TV locations and themes. e.g., dining in a forbidden forest.

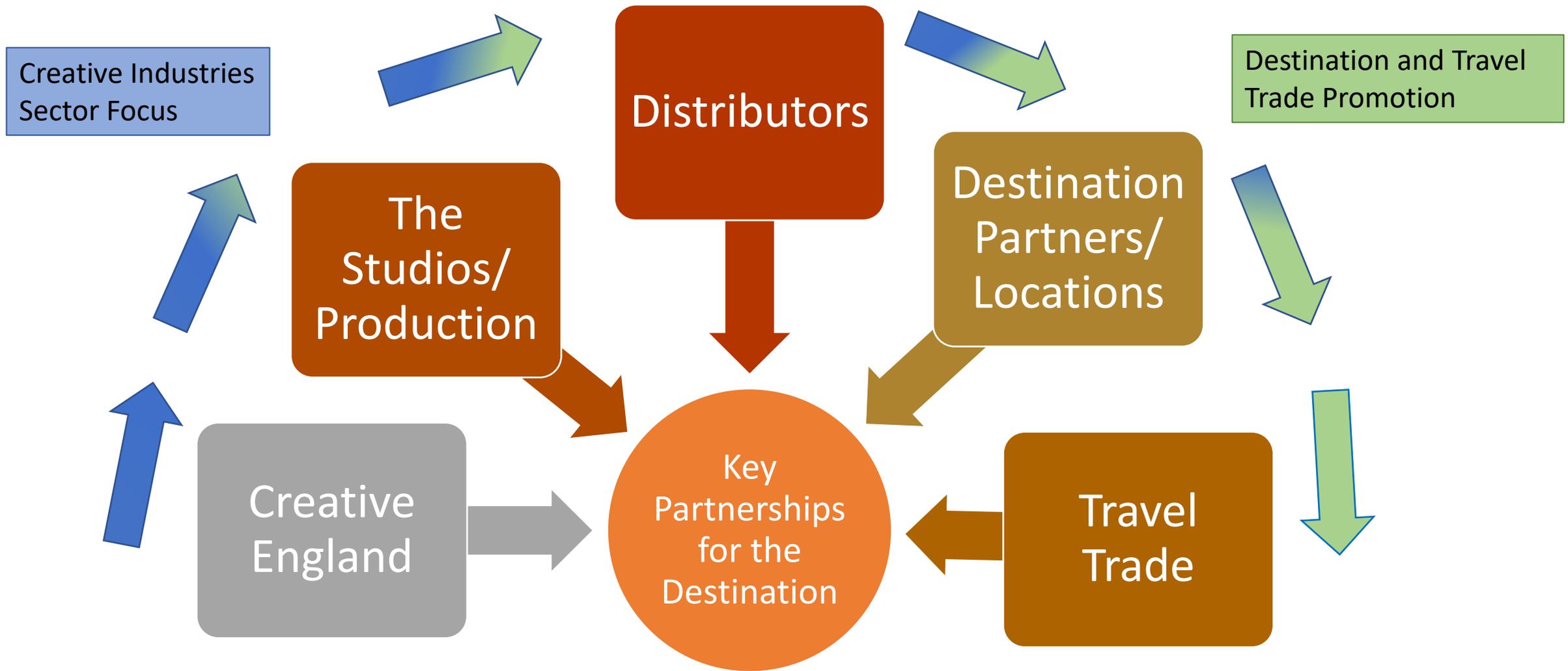
Group and FIT Appeal – The combination of film as a lead or component of a tour is one of the most effective ways to not only build a tour, but encourage visitors to go off the beaten track, visiting less well-known attractions e.g., Downton Tours may focus on Highclere Castle, but also include visits to Bampton, Cogges Heritage Trust, and The Swan at Swinbrook.

Building the Desire to Travel – The home or cinema audience is a ‘captivated’ viewer for a destination. The ‘love affair’ that develops between the viewer and the drama/ film not only builds a desire for future episodes, but to get closer by visiting the location. This desire can influence a visit many years after the release e.g., Visitors still quote Brideshead Revisited as a motivator for visiting Castle Howard.



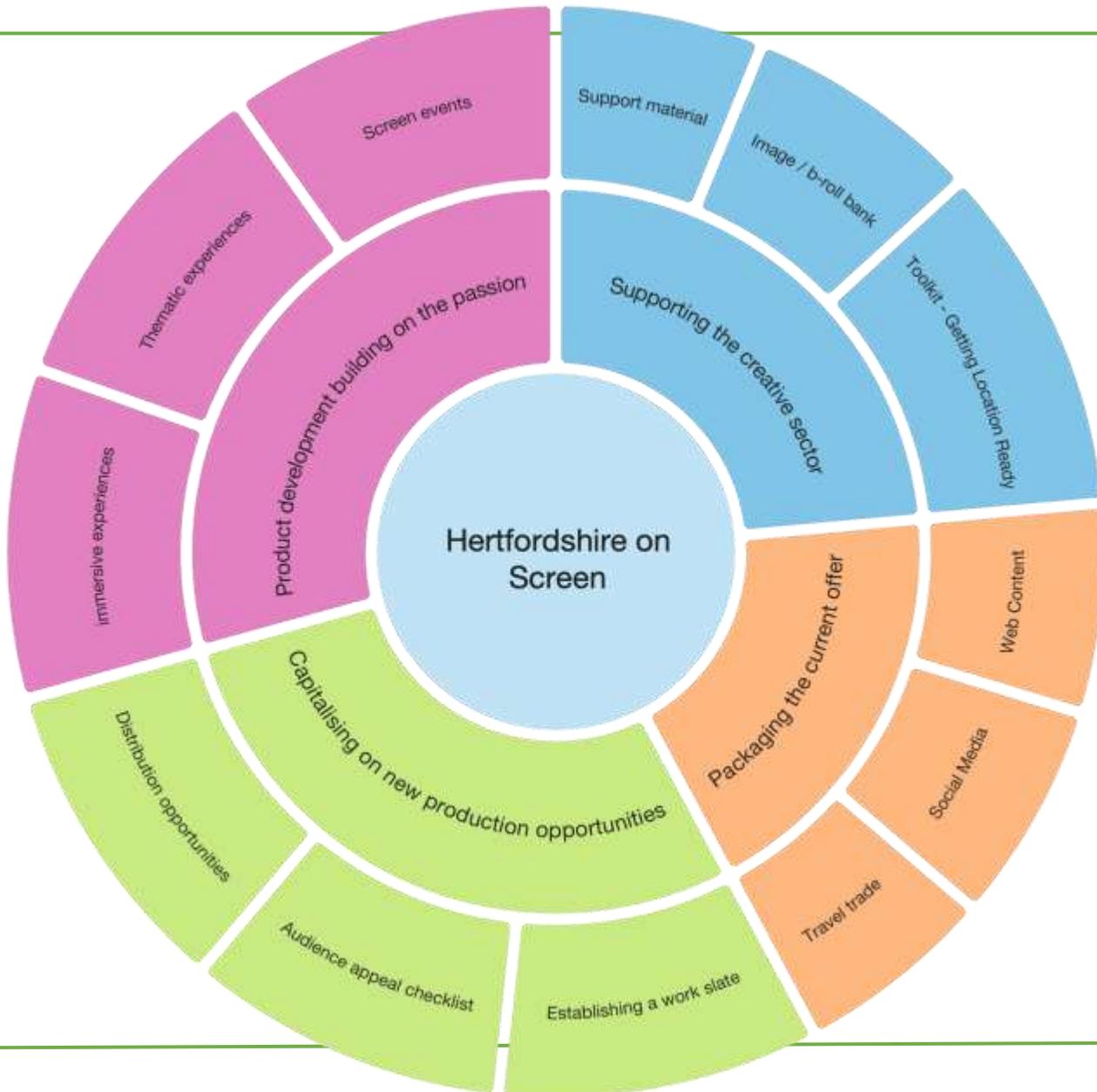
Outdoor dining @Amanda_farnese_health
Puzzlewood – Force Awakens
Tour@fangirlquest.com

The Importance of Partnerships for Screen Tourism



To develop a strong screen tourism product, there needs to be an investment in partnership working from preproduction to final distribution and tourism product development

Hertfordshire's Screen Tourism Opportunity



1. Supporting the Creative Sector:

- Collating information resources to support Creative England to position Hertfordshire as a 'go to' location destination.
- Provide toolkits for attractions/private locations and accommodation providers on how to position themselves and benefit from becoming a film friendly location.

2. Packaging the Current Offer:

- How to get the most out of your web & social media content for screen tourism/ reaping the benefits of what's trending on the networks/creating a wider experience for the visitor.
- Steps to work with the travel trade on generic screen tours as well as series/ film specific product.

3. Capitalising on New Production Opportunities:

- How to review the best-fit up and coming productions – audience/visitor fit and establishing a working slate.
- How Visit Herts can work with the networks and distributors to develop a clear partnership pitch/target markets for international distribution etc.

4. Product Development Building on the Passion:

- Focusing on Hertfordshire's strengths such as Warner Bros – this is about nurturing associated product to extend stays – e.g., Gothic long table dining experiences in historic buildings and forbidden forests.
- Immersive cinema experiences on location.

Next Steps

Strengthening Partnerships with the Creative Sector

- ✓ **Grow the locations offer on the Filming in England database**, to ensure Hertfordshire maximises its opportunities. (Appendix 2)
- ✓ Explore the potential for **developing a 'working slate' of productions** so Visit Herts can plan product/ thematic promotions around release dates.
- ✓ Share image and b-roll with Creative England to ensure destination imagery is up to date.
- ✓ Explore the opportunity to **feature creative industry representatives to bring the destinations screen tourism appeal** to life through destination blogs e.g., Interview with Art directors and Location Scouts on why Hertfordshire has such a great offer.... Places they would recommend to visitors.
- ✓ **Joint locations scout fam trip.**

Positioning Screen Tourism as a USP for Hertfordshire

- ✓ **Build screen tourism itineraries** for web and social media using the genre strengths highlighted in Appendix 1.
- ✓ Working closely with Warner Brothers Studio Tour London / Leavesden Studios to **position Hertfordshire as the home of Harry Potter.**
- ✓ **Developing the offer** via key travel trade partners, both as a lead tour and support content for a wider heritage-based tour.
- ✓ Working with key location/ attractions to get the most out of a filming project via the delivery of a screen tourism toolkit.
- ✓ **Raise the profile of the creative industry and destination offer**, using the value of screen tourism to leverage additional funding bids.

Developing the Product

- ✓ **Building on outdoor event opportunities:**
 - Outdoor cinema, a key trend for 2020, screening the films shot at the screening site.
 - Films that appeal to a target audience to encourage VFR travel, e.g., Bollywood Co event.
- ✓ **Extension of stay product** – film themed dining experience/hotels and accommodation providers offer themed evening events e.g., Murder Mystery linking to a local film.
- ✓ **Travel Trade packaging** linking to publicly accessible film location sites as well as pre-booked behind the scenes tours to access private estate areas.



Appendix 1: Hertfordshire Film/TV/ Digital Locations

The following audit reviews all currently released film and TV products that have an associated location in Hertfordshire. All are assessed on audience reach and recall for the film as well as the profile of the filming location and association.

This comparison data highlighting box office figures and viewing audience data for subscription and terrestrial channels enables an assessment of the film, its recall, and the opportunity to use the film as a conversation trigger between destination and audience.

Production title	Film Distributor	TV	Year	Locations	Box Office Figures	Viewing Audience	Location Recall	Lead/Support
History & Heritage								
Bridgerton		Netflix Original	2020/21	Hatfield House		82 Million	Medium	L
The Crown Series 1 - 4		Netflix Original	2016 - 2020	Wrotham Park Hatfield House Elstree Studio Brocket Hall		73 Million	Medium	L
The Great		Amazon Prime Video / Channel 4	2020	Hatfield House			Medium	
The Favourite	Fox		2019	Hatfield House	\$96m		High	L
Victoria & Abdul	Focus Features		2017	Knebworth House	\$22.2m		Medium	L
King Lear			2014		\$113			
Dianna	Entertainment One		2013	Langleybury Mansion, Kings Langley	\$21.7m		Medium	S
The Young Victoria	Momentum/Sony		2013	Balls Park Haileybury and Imperial Service College	\$31.9m		High	L
The Kings Speech	Momentum/Paramount		2010	Knebworth House Hatfield House Elstree Studios	\$427.4m		High	L
Shakespeare in Love	Universal		1998	Hatfield House	£289.3m		High	L



Appendix 1: Hertfordshire Film/TV/ digital locations cont.

Production title	Film Distibutor	TV	Year	Locations	Box Office Figures	Viewing Audience	Location Recall	Screen Tourism Lead/Support
Fantasy & Family								
Spiderman Far from Home	Columbia Pictures		2019	Leavesden Studios, Hatfield House	\$1.1b		Medium	-
Justice League	Warner Bros.		2017	Leavesden Studios	\$657.9m			-
Wonder Woman	Warner Bros.		2017	Leavesden Studios, Hatfield House	\$822.3		High	L
Paddington 2	Warner Bros.		2017	Knebworth Park , Knebworth House Leavesden Studios	\$227.9m		Medium	L
Paddington	TWC Dimension		2014	Estree Studio Hatfield House	\$282.3m		Medium	L
Harry Potter and the Deathly Hallows: Part 2	Warner Bros.		2011	Ashbridge Leavesden Studios	\$1.3b		High	S
Stardust	Paramount Pictures		2007	Ashridge Park, Little Gaddesden, Keeley Hire Ltd, Borehamwood Apsley, Berkhamsted	\$137.5m		Medium	S
Charlie and the Chocolate Factory	Warner Bros.		2005	Wrotham Park Hatfield House	\$474.9		Medium	S
Harry Potter and the Prisoner of Azkaban	Warner Bros.		2004	Leavesden Studios, Dowding Way, Watford	\$796.2m		High	S
Harry Potter and the Chamber of Secrets	Warner Bros.		2002	Leavesden Studios	\$879.6m		High	-
Harry Potter and the Sorcerer's Stone	Warner Bros.		2001	Ashridge Leavesden Studios	\$1b		High	S
Sleepy Hollow	Paramount Pictures		1999	Leavesden Studios Hatfield House	\$206		-	S
Labyrinth	Tri Star/ Lucas films/ Henson Ass.		1986	Elstree Studios	\$13.9m (US)		-	-
Star Wars: Episode VI - Return of the Jedi	Twentieth Centry Fox		1983	Leavesden Studios	\$475.1m		Medium	-
Star Wars: Episode IV - A New Hope	Twentieth Centry Fox		1977	Elstree studio	\$775.4m		Medium	-



Appendix 1: Hertfordshire Film/TV/ digital locations cont.

Production title	Film Distributor	TV	Year	Locations	Box Office Figures	Viewing Audience	Location Recall	Lead/Support
Action & Adventure								
Ready Player One	Warner Bros.		2018	Leavesden Studios	\$582m		Medium	-
The Legend of Tarzan	Warner Bros.		2016	Ashridge Estate Leavesden Studios Gaddesden Place	\$356.7m			S
Jason Bourne	Universal Pictures		2016	Leavesden Studios	\$415.5m			-
Children of Men	Universal Pictures		2006	Bushey, Stockers Farm	\$70m			S
Batman Begins	Warner Bros.		2005	Knebworth House Hatfield House	\$373.3m		Medium	L
The Hitchhiker's Guide to the Galaxy	Buena Vista Pictures		2005	Elstree Studios	\$104.5m		-	-
Jonny English	Universal Pictures		2003	St Albans Cathedral	\$106.4m		Medium	L
Lara Croft: Tomb Rader	Paramount/ UIP		2001	Hatfield House	\$274.7		Medium	S
Saving Private Ryan			1998	Hatfield (disused factory site)	\$482.3		-	-
Tomorrow Never Dies	United Artists		1997	Watford, St Albans,	\$333m			S
Batman	Warner Bros.		1989	Knebworth House Hatfield House	\$411.3m		High	L
Indiana Jones and the Last Crusade	Paramount Pictures		1989	Borehamwood Rickmansworth Masonic School Elstree Studio	\$474.1m			-
Indiana Jones and the Temple of Doom	Paramount Pictures		1984	Elstree Studios	\$333.1m			-



Appendix 1: Hertfordshire Film/TV/ digital locations cont.

Production title	Film Distributor	TV	Year	Locations	Box Office Figures	Viewing Audience	Location Recall	Lead/Support
Crime, Mystery, Thriller								
Enola Holmes		Netflix	2019	Hatfield House		78m	Medium	L
Taboo		BBC/ FX (Scott Free)	2017-present	Hatfield House		7m UK	Medium	S
Doctor Foster		BBC (Drama Republic)	2015-2017	Hitchin Hilton Hotel, Elton Way, Watford,		8.9m UK	Medium	S
Midsummer Murders		ITV (All3 Media)	1997 -	Chipperfield Albury The Common, Chipperfield		8-13m UK	low	S
Sherlock Holmes 2	Warner Bros		2011	Hatfield House Leavesden Studios	\$543.8m			S
Sherlock Holmes	Warner Bros		2009	Hatfield House Leavesden Studios	\$524		Medium	L
Hot Fuzz/ The World's End	Working titles/ Studio Canal		2007-09	Letchworth/ Welwyn Garden City	\$80.7		Medium	S
Inspector Morse - Who killed Harry Field?		A+E Networks	Season 5 - 1991	Blenheim Mews, Shenley Shenleybury Cottages, Shenley, Elstree Studios, Borehamwood,			medium	S
Murder on the Orient Express	Paramount Pictures		1974	Borehamwood, Well End,	\$27.6		Medium	S
Clockwork Orange	Warner Bros.		1974	Elstree Bricket Wood	\$26.9		Medium	S
Murder Most Foul	Metro-Goldwyn-Mayer (MGM)		1964	Sarratt, Palace Theatre, Watford, The Boot, The Green, Sarratt,				S



Appendix 2: Hertfordshire visitor locations & attractions currently promoted on www.filminginengland.co.uk

Attraction/ location	Filminginengland.co.uk Database	VisitHerts Investor	Opportunity
Aldenham Country Park	Yes	No	
Ashridge Estate	Yes	No	
Brocket Hall	Yes	Yes	
Bushey Museum & Art Gallery	Yes	No	
Cassiobury Park	Yes	No	
Celtic Harmony	Yes	No	
Down Hall Country House Hotel	Yes	Yes	
Fanhams Hall	Yes	No	
Frogmore Paper Mill	Yes	Yes	
Hanbury Manor Marriott Hotel	Yes	Yes	
Hatfield House	Yes	Yes	
Henry Moore Studio and Gardens	Yes	Yes	
Hertford Castle	Yes	No	
Hitchin Lavender Farm	Yes	No	
Hitchin Priory	Yes	No	
Knebworth House	Yes	Yes	
Moor Park Mansion & Golf Club	Yes	No	
Natural History Museum Tring	Yes	Yes	
Pendley Manor	Yes	Yes	
Rex Cinema	Yes	No	
Shendish Manor	Yes	Yes	
Sopwell House	Yes	Yes	
St Albans Cathedral	Yes	Yes	
Ye Olde Fighting Cocks	No	Yes	Yes
Tewin Bury Farm	Yes	Yes	
The Grove	Yes	Yes	
Watford Place Theatre	Yes	Yes	
Willows Activity Farm	Yes	Yes	



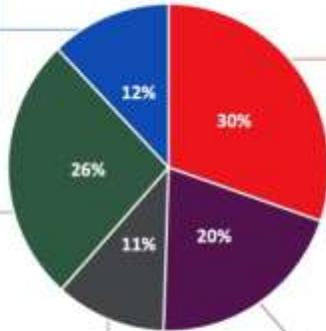
Appendix 3: The Domestic Market – Lifestyle Segments

5. ASPIRATIONAL FAMILY FUN

Typically information-hungry, London-based high earners with children at home, they regularly take city breaks where they can indulge in active, family-friendly pursuits, such as sporting events and cultural visits.

4. FREE AND EASY MINI-BREAKERS

More likely than other segments to be 'young, free and single'. Demographically close to 'the average Joe', but they really stand out in their holiday behaviour.



3. FUSS-FREE VALUE SEEKERS

Empty nesters on a budget, they seek good value beach holidays with convenient transport links. Tend to be less digitally active than other segments – less likely to engage in social media or book holiday online.

1. COUNTRY-LOVING TRADITIONALISTS

Empty nesters with traditional values, they are likely to have recently taken a countryside break in England. Good quality, secure accommodation is a priority when booking a holiday.

2. FUN IN THE SUN

Typically parents looking for family-orientated summer holidays where beaches play a starring role. Tend to seek cheaper, more 'social' alternatives to hotel accommodation, such as caravans or holiday camps.



Country-Loving Traditionalists

- ✓ Largest domestic travel segment, repeat visitor.
- ✓ Heritage/ rural is primary driver, also local food & drink, meeting locals
- ✓ Influenced by press articles & word of mouth, also active on social media (Facebook & Twitter).
- ✓ Will travel out of season.

Target audience for:

The Favourite, Kings Speech, The Crown, Bridgerton.

Aspirational Family Fun

- ✓ Strong London based segment looking for experiential learning/ activities.
- ✓ Cities and family-based attractions are the main drivers, however increasingly as parents strive to disconnect their children with tech.
- ✓ Influenced by social media (Instagram/ Facebook) and peer recommendation.
- ✓ High digital network subscribers – Netflix, Prime, Disney +.

Target audience for:

Harry Potter, Paddington 1&2, DC and Marvel films, Enola Holmes.

Free and Easy Mini-Breakers/Millennials

- ✓ Traditionally seen as city breakers, this segment is now seeking new experiences driving the under-tourism trend for second city/ rural town visits, influenced by pop culture.
- ✓ Experience led – early adopters of new product.
- ✓ Heavily influenced by Instagram/peers/ blogs/ influencers/ book online Experience and time led – package the product as short breaks 24/48/72-hours.

Target audience for:

Harry Potter, DC and Marvel films, Bridgerton.

The 2016 VisitEngland customer segmentation research highlighted five core lifestyle segment groups as best prospect for a domestic overnight leisure stay. All have the potential to engage with the Hertfordshire screen tourism product, however, there are a few segments that show a greater inclination to be influenced by film and TV.

In addition, the Millennial and Gen Z segments are also incorporated under the 'free and easy mini breakers', as they are increasingly drawn to pop culture related experiences with a clear Instagramable/Tik-Tok currency. They are also a target cinema and streaming audience for fantasy and action films.

Guideline segment age range:

- Baby Boomers – 56-75 yrs
- Gen X – 41-46 yrs
- Millennials – 26-40 yrs
- Gen Z – 11-25 yrs



Appendix 3: The International Market

In 2016, VisitBritain profiled the key international markets into lifestyle segments (leisure travel), the prominent groups are highlighted below.

1. Buzzseekers
2. Explorers
3. Relaxed Sightseers

Key differences for the international markets are:

- ✓ A greater desire to engage with traditional/ landmark experiences like going to the pub, fish and chips and afternoon tea. British icons are also of high interest, but they are eager to experience them in different ways.
- ✓ Booking via a DMCs/ Tour operators as well as direct.
- ✓ Greater concerns over countryside connectivity and ease of travel



Hertfordshire Visitor Economy stats 2019.

1.9 million are overnight stays 6% (1.4 million domestic overnight (74%) -Overseas 0.49m 26%. Note: VFR- 60% International overnights
 Top 5 markets: Visits: USA, Germany, Ireland, Spain ,France. Spend: USA, Germany, Spain, France, India

Hertfordshire Best Prospect Markets for Screen Tourism

USA

- ✓ Hertfordshire’s number one market for visits and spend – Day visitor market from London small overnight market for Hertfordshire.
- ✓ Primary segment – Explorers & Buzzseekers.
- ✓ Skew to summer months.
- ✓ Potential to work with US travel trade to develop luxury/unique experiences that would appeal to virtuoso clients.

Example products:

Sightseeing, pubs, heritage and meeting locals – Large day trip audience from London, an opportunity for small groups and product extension built around Warner Brothers Studio visit and heritage film location visits as a key driver.

Germany

- ✓ Hertfordshire 2nd market for visits and spend. (3rd for UK overall).
- ✓ Primary segment – Explorers & Buzzseekers.
- ✓ Reasonable market for seasonal spread, slight skew to July-September.

Example products:

High interest in food & drink, countryside & nature, history & heritage and famous icons - worth cross checking UK TV unit sales to Germany as key shows such as Call the Midwife are very popular.

Spain

- ✓ Hertfordshire 4th market for visits and 3rd for spend.
- ✓ Primary segment – Buzzseekers. – Interest in screen tourism.

France

- ✓ Hertfordshire 5th market for visits and 4th for spend.
- ✓ Primary segment – Explorers.

ROW

- ✓ The international appeal of Warner Brothers Studio Tour London – ‘The Making of Harry Potter’ experience offers the potential for Hertfordshire to capitalize on the rest of the world to encourage extension of visit via working closely with travel trade to build a screen tourism theme – screen tourism is a trigger for the following markets Australia (7th for visits), Italy, and India (5th for spend) linking to Bollywood.



Appendix 4: Hertfordshire Screen tourism SWOT Analysis

Strengths

- Established filming location with assets such as Elstree and Leavesden studios
- Announcement of Sky Studios in Elstree by 2022
- Strong existing product such as Warner Bros. Studio Tour London – ‘The Making of Harry Potter’
- Strong relationship with Creative England and DCMS
- Engaged network of Visit Herts partners
- Strong content writers, research team and travel trade contacts
- Close proximity to London and airports to attract international market
- District Councils experienced in dealing with filming requests

Opportunities

- Opportunity to boost Hertfordshire’s Visitor Economy
- Increase overnight stays, off-season visits and the dispersal of visitors.
- Strengthening Hertfordshire’s profile for creative and digital sector inward investment
- Increase collaboration to develop new product
- Opportunity to reach new audiences
- Attracting more large-scale filming to Hertfordshire
- Leverage additional funding from DCMS and VisitEngland
- Support funding bids / tourism zone bid with screen tourism being a USP
- Develop strong links with studios and production companies to support connecting the filming with the destination

Weaknesses

- Lack of connection with production companies
- Lack of connection between film/TV production and destination
- Lack of interpretation and experiences to animate the filming locations

Threats

- Difficult to engage with production companies
- Gaining access to intellectual property (IP) rights
- Businesses not engaging/supporting
- Delay in tourism recovery strategy
- Competition from other destinations



Appendix 5: The Multiplier effect of screen tourism

Destinations that successfully communicate the link between the film/TV product and the filming location can raise the awareness of the destination and create interest from potential visitors. If effective relationships with the production companies are developed this will create further opportunities to increase awareness of this link.

Once this link has been made, the development of an experience or interpretation of the screen tourism product is crucial to ensure the visitor has a reason to visit the filming location. It also provides an opportunity for additional spending.

Once the product is developed the screen tourism offer can be promoted through B2B and B2C channels which in turn grows the visitor economy.

