Project Accessible

An exploration of the North York Moors' suitability for accessible tourism

Prepared for VisitBritain

View of NYM from Sutton Bank © Mike Kipling NYMNP

Background of the project

VisitBritain/ VisitEngland seeks to stimulate inbound visits from people with accessibility requirements. VisitBritain/ VisitEngland has a specific role in promoting the North York Moors (NYM) to international markets via an agreement with the North York Moors National Park Authority, as a result of Section 106 contributions from the developer of a new Polyhalite mine in the National Park.

The North York Moors Accessibility Project seeks to inspire people with accessibility requirements in the Dutch and/or German markets, and from the Explorer segment, to take short breaks in the North York Moors region.

To better understand the travel behaviour of this segment, VisitBritain/ VisitEngland commissioned research particularly into their customer journey, their perceptions and consideration of the North York Moors.

A quantitative study was carried out surveying 200 German and 200 Dutch Explorers with a health condition or disability which affects their travel. For more inclusivity, carers were allowed to participate on behalf of a respondent with a health condition with their permission.

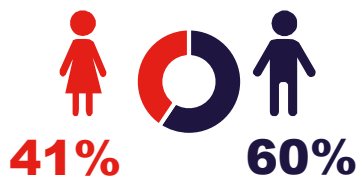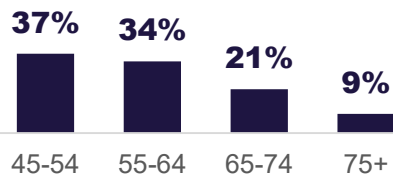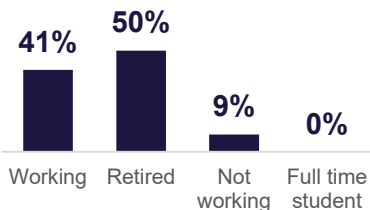Fieldwork and analysis was carried out by Kubi Kalloo from 27th August to 3rd September 2021.

Image source: Lealholm, North Yorkshire, England ©VBI

Introduction

Who did we speak to?

Whitby Viaduct © VBI

Who did we speak to? - Germany

Gender
41%   60%

Age Band
- 45-54: 37%
- 55-64: 34%
- 65-74: 21%
- 75+: 9%

Working status
- Working: 41%
- Retired: 50%
- Not working: 9%
- Full time student: 0%

Social Media Usage
- Facebook: 62%
- Instagram: 34%
- Pinterest: 17%

Radio Consumption
- I don't listen to the radio: 9%
- I listen to regional radio stations only: 33%
- I listen to national radio stations only: 20%
- I listen to both national and regional radio stations: 40%

Germany Region
- Nordrhein-Westfalen: 20%
- Bayern: 12%
- Baden-Württemberg: 10%
- Niedersachsen: 8%
- Brandenburg: 8%
- Berlin: 8%
- Schleswig-Holstein: 7%
- Rheinland-Pfalz: 6%
- Hessen: 6%
- Sachsen: 5%
- Sachsen-Anhalt: 3%
- Hamburg: 3%
- Saarland: 2%
- Mecklenburg-Vorpommern: 2%
- Thüringen: 2%
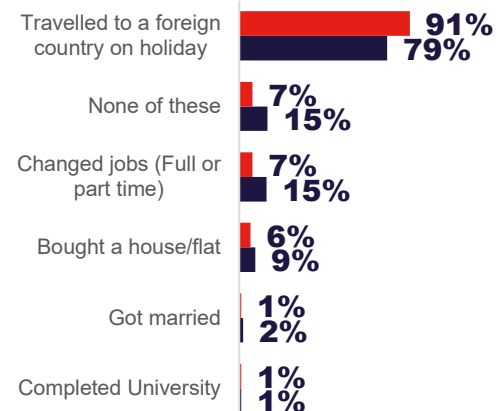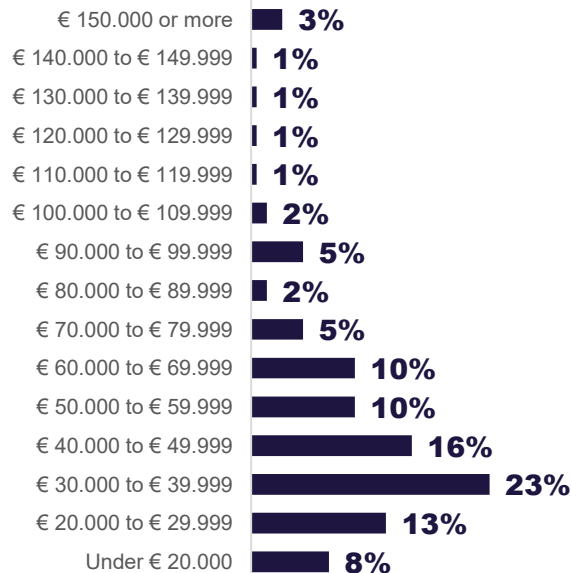- Bremen: 2%

International Leisure Travelers

All needed to travel internationally in past 3 years / expect to in next 12 months

- Travelled to a foreign country on holiday: 91% / 79%
- None of these: 7% / 15%
- Changed jobs (Full or part time): 7% / 15%
- Bought a house/flat: 6% / 9%
- Got married: 1% / 2%
- Completed University: 1% / 1%

■ Expected to do in the next 12 months
■ Have done in the past 3 years

Household income
- € 150.000 or more: 3%
- € 140.000 to € 149.999: 1%
- € 130.000 to € 139.999: 1%
- € 120.000 to € 129.999: 1%
- € 110.000 to € 119.999: 1%
- € 100.000 to € 109.999: 2%
- € 90.000 to € 99.999: 5%
- € 80.000 to € 89.999: 2%
- € 70.000 to € 79.999: 5%
- € 60.000 to € 69.999: 10%
- € 50.000 to € 59.999: 10%
- € 40.000 to € 49.999: 16%
- € 30.000 to € 39.999: 23%
- € 20.000 to € 29.999: 13%
- Under € 20.000: 8%

Segment

100% of the sample come from the Explorers segment:

Explorers are typically independent of social image – true to themselves, they are contented and enjoy holidays that offer relaxation and a relaxed pace. Nature lovers, they enjoy the outdoors as well as visiting the must-see sites. Despite intense pre-planning, they embrace the unexpected, particularly the opportunity to go off the beaten track, meet locals and embrace local culture. Typically, they are 45+ years and likely to travel as couples.

Sample size n=200

kubi kalloo   VisitBritain   VisitEngland

Who did we speak to? - Netherlands

Gender
44% 55%

Age Band
- 45-54: 39%
- 55-64: 30%
- 65-74: 22%
- 75+: 8%

Working status
- Working: 47%
- Retired: 36%
- Not working: 5%
- Full time student: 0%

Social Media Usage
- TikTok: 12%
- Pinterest: 24%
- Twitter: 27%
- Linkedin: 28%
- Instagram: 33%
- Facebook: 72%

Radio Consumption
- I don't listen to the radio: 20%
- I listen to regional radio stations only: 8%
- I listen to national radio stations only: 20%
- I listen to both national and regional radio stations: 52%

Netherlands Region
- South Holland: 22%
- North Holland: 14%
- North Brabant: 13%
- Flevoland: 10%
- Gelderland: 9%
- Utrecht: 6%
- Drenthe: 6%
- Limburg: 5%
- Overijssel: 4%
- Friesland: 4%
- Zeeland: 2%
- Groningen: 2%

International Leisure Travelers

All needed to travel internationally in past 3 years / expect to in next 12 months

- Travelled to a foreign country on holiday: 86% / 88%
- None of these: 10% / 9%
- Changed jobs (Full or part time): 2% / 14%
- Bought a house/flat: 13% / 17%
- Got married: 2% / 9%
- Completed University: 7% / 7%

■ Expected to do in the next 12 months
■ Have done in the past 3 years

Household income
- € 150.000 or more: 2%
- € 140.000 to € 149.999: 1%
- € 130.000 to € 139.999: 0%
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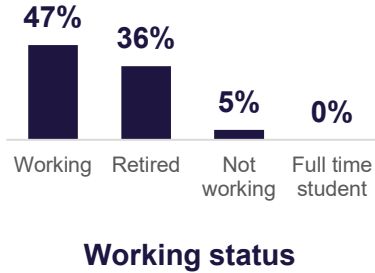- € 30.000 to € 39.999: 16%
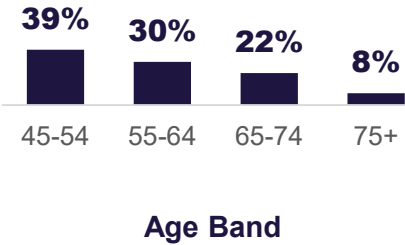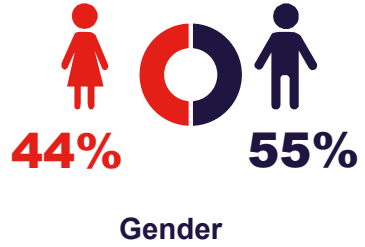- € 20.000 to € 29.999: 9%
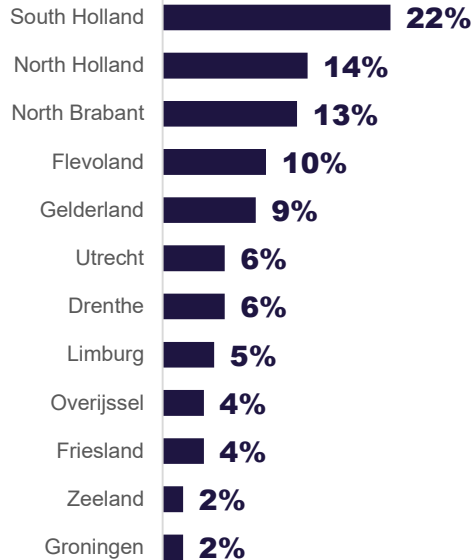- Under € 20.000: 7%

Segment

100% of the sample come from the Explorers segment:

Explorers are typically independent of social image – true to themselves, they are contented and enjoy holidays that offer relaxation and a relaxed pace. Nature lovers, they enjoy the outdoors as well as visiting the must-see sites. Despite intense pre-planning, they embrace the unexpected, particularly the opportunity to go off the beaten track, meet locals and embrace local culture. Typically, they are 45+ years and likely to travel as couples.
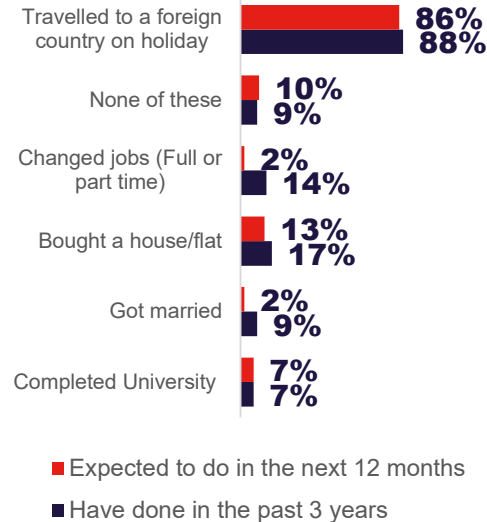
Sample size n=201

Who did we speak to? – Health conditions and impairments

Health conditions and impairments

Condition	The Netherlands	Germany
A long-term illness or health condition which may reduce the ability to carry out day to day activities	30%	39%
Arthritis or chronic conditions that limit physical capabilities	27%	34%
Physical or mobility impairment (non-wheelchair user)	32%	30%
Physical or mobility impairment (wheelchair user)	20%	23%
A health condition of impairment not covered by the categories listed	17%	21%
A mental health condition (e.g. depression, schizophrenia, anxiety)	12%	18%
Vision – partially sighted	9%	16%
Hearing – partial hearing loss	16%	12%
A specific learning difficulty or intellectual disability (e.g. dyslexia,…	5%	6%
Dementia (e.g. Alzheimer's disease)	1%	6%
A social/communication impairment (e.g. An autistic spectrum condition)	10%	6%
Hearing – deaf	0%	4%
Prefer not to say	4%	4%
Vision - blind	1%	3%

■ The Netherlands ■ Germany

A60. Disability / health conditions Sample size n=401

Understanding accessibility needs as they relate to travel to NYM

Castle Howard © VisitBritain / Tomo Brejc

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The breadth of accessibility requirements covered within this report vary considerably. To make the results easier to act upon we have grouped our target audience by their accessibility requirements, which we should provide for. Though, our targets differ between the strength of accessibility requirements, there is considerable overlap in their behaviours and attitudes. Where differences exist, we will discuss where these groups converge and diverge to help give a full understanding of barrier free tourism.

Whilst our groups differ on their requirements for travel, their motivations are similar

	More Accessibility requirements n=174	**Fewer Accessibility requirements** n=63	**Some Accessibility requirements** n=164
Impairment / health condition	**Most likely self-defining as:** Physical or mobility impairment (wheelchair or not)	**Most likely self-defining as:** Long-term illness or health condition Arthritis and chronic condition	**Most likely self-defining as:** Long-term illness or health condition Physical or mobility impairment (no wheelchair)
Barriers to travel	**Has to consider:** Accessibility of the accommodation Accessibility of transport to and around the destination Accessibility of things to see and do The ease of getting around the destination	**Has to consider:** Transport links Weather Ease of getting around	**Has to consider:** Where they can get healthcare Accessibility of the accommodation
Accessibility requirements	**Look for a destination with:** No or few steps Accessible toilets Accommodation options certified for their needs	**Look for a destination with:** Accessible toilets No or few steps Places to store medical supplies	**Look for a destination with:** Accessible toilets No or few steps Places to store medical supplies
Holiday motivations	**Want to:** Feel relaxed Switch off Experience great food and drink	**Want to:** Feel relaxed Switch off Experience great food and drink	**Want to:** Feel relaxed Switch off Experience great food and drink
Future travel interest	**Looking for a destination that has:** Cultural Activities Food, drink and entertainment Scenery	**Looking for a destination that has:** Scenery Cultural activities Relax and switch off	**Looking for a destination that has:** Scenery Relax and switch off

More detail available in the appendix

How does our target audience tend to travel?

Regardless of accessibility needs, motivations are generally consistent

Our target is looking to find a destination that offers beautiful scenery, where they can relax in a different culture and experience food, drink and entertainment

Travel interest in the future

showcases the elements of a trip that are likely to be important to target audience going forward

93%
Scenery
(including: the great outdoors, wildlife, coastlines and islands, beaches etc.)

89%
Relaxation / Switching off
(including: Improving my physical / mental wellbeing, escaping routines, spending time with family, visiting spas etc.)

88%
Cultural activities
(including: Visits to traditional buildings, heritage sites, art exhibitions, national events etc.)

87%
Food, Drink & Entertainment
(including: Pubs, nightlife, gourmet food, local delicacies, breweries etc,.)

80%
People/Culture
(including: Meeting new people, meeting locals, experiencing a new culture)

77%
Recreational Activities (including: visiting parks and garden)

This does not significantly differ between our groups, according to accessibility needs
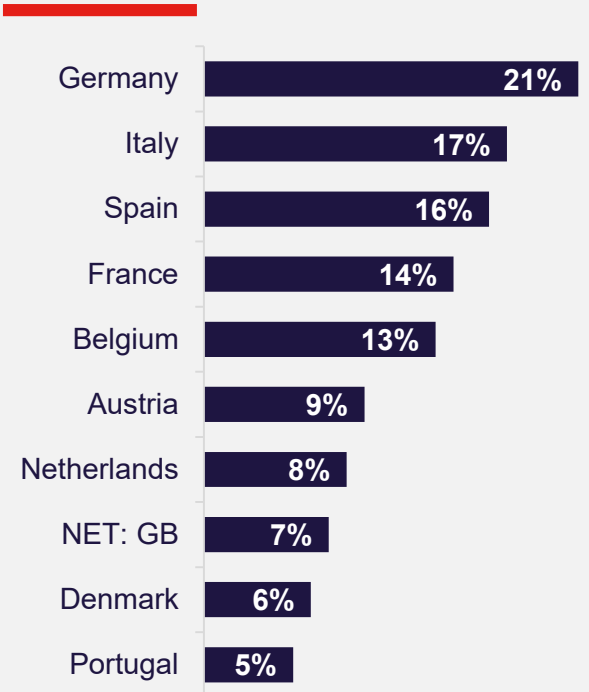
German respondents are more likely to be interested in relaxing/switching off

B70. Travel Interest in the Future Sample size n=401

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Our target audience are not heavy travellers and tend to travel within Europe

Compared to our global segmentation work, this is significantly lower than what we would expect in both the Netherlands and Germany. And they predict they will travel to one country each year for the next 3 years. This does not differ between our accessibility requirements.

Countries visited
in past 5 years (top 10)

Country	%
Germany	21%
Italy	17%
Spain	16%
France	14%
Belgium	13%
Austria	9%
Netherlands	8%
NET: GB	7%
Denmark	6%
Portugal	5%

Future travel intention (in the next 3 years)

Country	%
Germany	22%
Italy	20%
Spain	23%
France	18%
Belgium	9%
Austria	8%
Netherlands	14%
NET: GB	17%
Denmark	6%
Portugal	5%
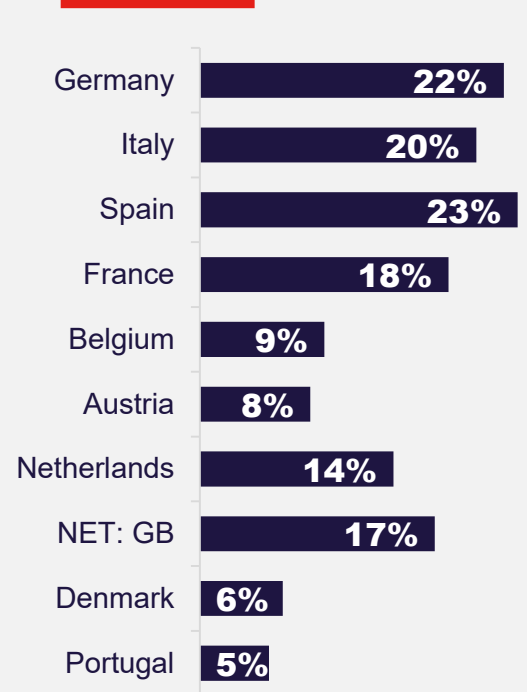
Average number of countries visited per year (past 5 years)

1.8

Total number of countries expecting to visit (next 3 years)

3.3

**Considerably less than the explorer segment overall
9.3 countries visited in the past 2 years (Germany)*
5.4 countries visited in the past 2 years (Netherlands**

kubi kalloo VisitBritain VisitEngland

Whilst the NYM has adopted a no-fly policy, this target has a preference for flying

This is especially true of our group with the most accessibility requirements. Driving is the next most commonly preferred option, further challenging our environmental ambitions.

Propensity to fly

Showcases the preferred travel options for our target audience when thinking about travelling to Great Britain

57% of our sample would prefer to fly to Great Britain

For those who are not interested in flying, they would prefer to travel by:

54% by car

34% by ferry

32% by train

28% a bus / touring holiday

Our group which has more accessibility requirements, are more interested in flying than the other groups

Dutch respondents are more interested in no-fly travel than German respondents

A100. Preferred travel options (multiple answers permitted) Sample size n=401

But, catching COVID-19 is likely to still be a fear for our target audience

Therefore into 2022-2023 our target audience are keen to avoid destinations with high COVID-19 rates, low vaccination rates or places that do not have mask regulations

Impact of COVID-19

Showcases the COVID-19 relevant sacrifices our target believes they will still have to make in the future

The following will be a future consideration....
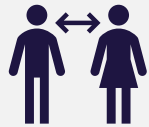
83%
COVID-19 rates

(Includes the COVID-19 rates at time of planning / booking and cleanliness of the destination)

73%
COVID-19 requirements for entry

(Includes if COVID-19 tests are required to enter, vaccination rates whether mask regulations and social distancing rules are in place)

Our group with more accessibility requirements and barriers to travel are more likely to consider COVID-19 rates (93%) and COVID-19 requirements for entry (87%) going forward.

B50. Impact of COVID-19 Sample size n=401

kubi kalloo

VisitBritain

VisitEngland

A summary: What do we know about our target audience?

Our target audience are not heavy travelers and are expecting to travel to one country each year for the next 3 years.

Although Britain has only been visited by few of the respondents, almost one in five are interested in visiting in the next 3 years.

They tend to travel in Europe. They are interested in the scenery of a destination, being able to switch off, experiencing the culture of a destination and tasting the food, drink & entertainment a destination offers.
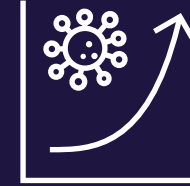
Concern surrounding COVID-19 remains high. This is strongest amongst those with more accessibility requirements.

The Customer Journey for planning and booking a trip to the North York Moors

Whitby Abby – Image Credit: VisitBritain

How do our target audience plan trips?

Our target audience spend 1 month or less planning their trip

They rely on the destination's website for key information regarding barrier free travel as well as accommodation provider websites and review websites

Our group with more accessibility requirements, rely on accessibility suppliers, suggesting partnering with these specialists is key to encourage visitation

Our target audience take up to 6 months to book their trip, suggesting there is a long period of time to encourage visitation of the North York Moors

Our target audience tend to book their trips on the destination website, or directly through accommodation providers or with tour operators

Once on the ground, our target audience look to the local staff for guidance on what to do, meaning we need to educate staff so they can pass this on to our target audience

Whitby Abbey – Image Credit: VisitBritain

The NYM official website is likely to be the first stop for those seeking accessibility information

Our target audience spend around 1 month planning a trip, and mostly look to the destination's website, accommodation providers and travel review websites for inspiration

Inspiration phase

69%

tend to spend up to 1 month planning, taking their time to decide when to come, what window of time to visit, and how long.

Resources used

Resource	%
The destination's official website	56%
Accommodation providers' websites / apps (e.g. Airbnb)	43%
Travel review websites / apps (e.g. TripAdvisor)	41%
Brochures / leaflets	35%
Travel guides (offline / books)	34%
Attraction providers' websites / apps	33%
In person travel agents (an offline store / in an office)	31%
Tour operators / travel planners	29%
Accessibility specialists	26%
Social media	26%
Through friends and family	23%

Our group with more accessibility requirements are more likely to look for information with an accessibility specialist compared to the other groups, suggesting that targeting individuals with many accessibility requirements must include accessibility specialists

D10. Inspiration Phase (Length of time), D20. Inspiration Phase (resources used) Sample size n=401

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Our target audience rely on accommodation providers and tour operators, so partnerships with these help to reach our target audience effectively

Tourists with accessibility requirements need around 1-6 months to book their trip, relying on the destination website, accommodation providers and tour operators to book a trip

Booking Phase

47%
tend to book after 1-6 months, suggesting VE / VB have a large period of time to influence their decision

Resources used

Resource	%
Destination website	35%
Directly with accommodation providers' website	34%
Tour operators / package holiday providers	28%
Directly with accommodation booking platform	27%
Specialist accessibility tour operator	25%
Specialist accessibility travel agent (book all together)	24%
An online travel agent (book all together)	23%
An online travel agent (book individual experiences)	20%
Specialist accessibility travel agent (book seperately)	19%
Directly with a travel provider (airline, ferry, train)	17%
Flight comparison sites (e.g. Skyscanner / Kayak)	13%

Our group with more accessibility requirements than our other personas are more likely to work with online travel agents who specialise in accessibility trips suggesting a need to partner with these in our respective markets.

D50. Booking Phase (Length of time), D60. Booking Phase (resources used) Sample size n=401

kubi kalloo

VisitBritain

VisitEngland

To inspire our target audience to book a trip to the North York Moors, we need to advertise how to get around the area

The major considerations our target audience have to take are getting around, which may be a hygiene factor for these tourists

Top 5 considerations – Inspiration and booking phase

	Inspiration Phase	Booking Phase
The ease of getting around the destination	48%	41%
The transport links to the destination	46%	41%
Step free access	46%	43%
The location / frequency of toilets / places to rest	41%	37%
The healthcare system / cost of healthcare	36%	26%

For our group with more accessibility requirements, their considerations at the booking and inspiration phase are stronger, suggesting that they require more in-depth information before booking their trip, which the website and other touchpoints should easily provide

Local staff need to be educated on barrier free travel to aid our target audience

Once in the destination, our target audience look to lean on local staff, leaflets and the destination website for guidance on what to do.

On the ground

50%
rely on local staff on the ground

48%
look for brochures, leaflets and books

45%
Use the destinations website

Sharing after the trip

Friends and family	62%
Share experiences on social media	34%
Talk to others about the trip over the phone or via Skype or similar	24%
Post a review about the trip	24%
Share trip experiences via email, text or other written medium (not social media)	24%
Share experiences another way	15%
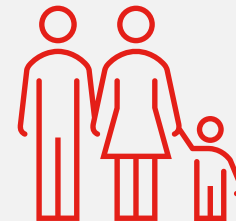
In the Netherlands, our target audience are more likely to share experiences via social media, whilst our German target audience are more likely to talk to friends and family

kubi kalloo

VisitBritain

VisitEngland

VBI

And what do they know about the North York Moors?

Cleveland Way © VisitBritain/Thomas Heaton

Only one quarter of our target audience are aware of the North York Moors

Even amongst those who are aware, few understand the NYM's proposition

Awareness Of the North York Moors

Total

28%

What do they know?

The NYM is more top of mind amongst those who have greater accessibility requirements.

More accessibility requirements

+8%

Vs. total

"It's a national park."
"It's a green plain with moors, castles, in the middle of Great Britain."

"Definitely nothing."

Fewer accessibility requirements

-15%

Vs. total

"Located above Leeds."
"A beautiful area in the middle of London and Edinburgh."

"Nothing I know."

Some accessibility requirements

-3%

Vs. total

"National park in England."
"Northern England National Park, Hills and Uplands."

"Nothing."

Existing perceptions focus on natural beauty, tranquility and inaccessibility

Around 1-in-2 believe the North York Moors has awe-inspiring landscapes. It is also seen as a destination that has coastal areas and feels peaceful and relaxing. Only, 1-in-3 feel the destination will be accessible for their needs

Perceptions of the North York Moors

showcases what our target audience, who are aware of the North York Moors, associate with the destination

50%
Has awe-inspiring landscapes

43%
Has beautiful coastal areas to explore

40%
Feels peaceful and relaxing

33%
Is a place where I can switch off from my needs

32%
Feels welcoming and a place where anyone can belong

31%
Has historic towns and sites to explore

31%
It is accessible for my needs

31%
It feels safe to visit

This does not significantly differ between our groups

Meaning that even amongst those aware of the NYM, only half are interested in visiting

Some of our target audience are worried about being able to access different parts of the North York Moors, and are worried their accessibility requirement / health condition may impede a trip here

Interest in visiting the North York Moors

Total	Aware of NYM
22%	**49%**

Why do they not want to visit?

More accessibility requirements

+8% Vs. total

"It is too difficult for me" "Cliffs and things like that are problematic"

"England doesn't attract me so much because of the climate."

Fewer accessibility requirements

-11% Vs. total

"The reason is that my autistic spectrum disorder makes me overstimulated and tired very easily and the North York Moors is a terribly distant destination."

"It is not my favourite destination at the moment"

Some accessibility requirements

-4% Vs. total

"I don't think that I can physically do that."

"Requires a lot of physical effort."

"She does not see Great Britain as her dream vacation destination."

A summary: What does our target audience know about the North York Moors?

We are facing an awareness challenge

- Very few people in our target audience are aware of the North York Moors

We have a perceptual challenge

- People think it's beautiful, rugged and has immense scenery, but that does not play out well for people focused on accessibility

Therefore, we focus resources on refining the proposition for people and build awareness around it

How do we build a more relevant proposition around barrier-free tourism?

How our correlation map works

High Effort = High Reward

Not associated with NYM, of interest to our target

Elements listed here are important motivators to our target audience when choosing a destination but are not currently associated with the North York Moors.

Elements listed here are not important motivators to our target audience when choosing a destination and are not currently associated with the North York Moors.

Not associated with NYM, not interesting to our target

High Effort = Low Reward

Low Effort = High Reward

Associated with NYM, of interest to our target

Elements listed here are important motivators to our target audience when choosing a destination and are currently associated with the North York Moors.

Elements listed here are not important motivators to our target audience when choosing a destination but are currently associated with the North York Moors.

Associated with NYM, not interesting to our target

Low Effort = Low Reward

Focus communications on relaxation and awe-inspiring landscapes

No matter the accessibility needs our target audience must take into consideration, they are engaged by a destination that has awe-inspiring landscapes and also historic towns and sites, where they can relax, which is what the North York Moors is felt to provide

High Effort = High Reward
Not associated with NYM, of interest to our target

Low Effort = High Reward
Associated with NYM, of interest to our target

Has historic towns and sites to explore & awe-inspiring landscapes

Has awe-inspiring landscapes

Feels peaceful and relaxing

It is easy to travel to
It feels safe to visit
It is accessible for your/their needs
Is a place where I can be myself
Has the facilities I need
Feels welcoming and a place where anyone can belong
Has beautiful coastal areas to explore
It's a great place for me to escape from current everyday life
It is easy to travel around
Is a place where I can switch off from my needs
Has historic towns and sites to explore

It offers both iconic sites and unexpected experiences

It feels optimistic and forward looking as a destination

Data point demonstrates the combination of people who selected **both** "has historic towns and sites to explore" and "has awe-inspiring landscapes" suggesting that providing both is important to our target audience

Not associated with NYM, not interesting to our target
High Effort = Low Reward

Associated with NYM, not interesting to our target
Low Effort = Low Reward

With the NYM landscapes being both appealing and daunting, we need to balance the emotion of enjoying the landscape and remote rugged beauty

Whilst visiting a destination with awe-inspiring landscapes is important, our target audience don't feel they can access these landscapes and need assurances in order to consider the North York Moors

Those who believe the below about the North York Moors are less likely to want to visit the North York Moors...

• Has awe-inspiring landscapes

Alleviate fears of the inaccessibility of the awe-inspiring landscapes to drive interest in the North York Moors

Those who believe the below about the North York Moors are more likely to want to visit the North York Moors....

• It feels optimistic / forward looking as a destination
• It feels safe to visit

Talking up these elements is likely to drive interest in the North York Moors

Talk to accessible accommodation options to alleviate fears of the unsuitability of the North York Moors

Our target audience need accessible accommodation and want to engage in physical activities. Therefore, we need to address these barriers in order to drive visitation

Those who must consider the below are less likely to want to visit the North York Moors...

- Accessibility of the accommodation

Talk to and demonstrate accessible accommodation options to drive a desire to visit the North York Moors

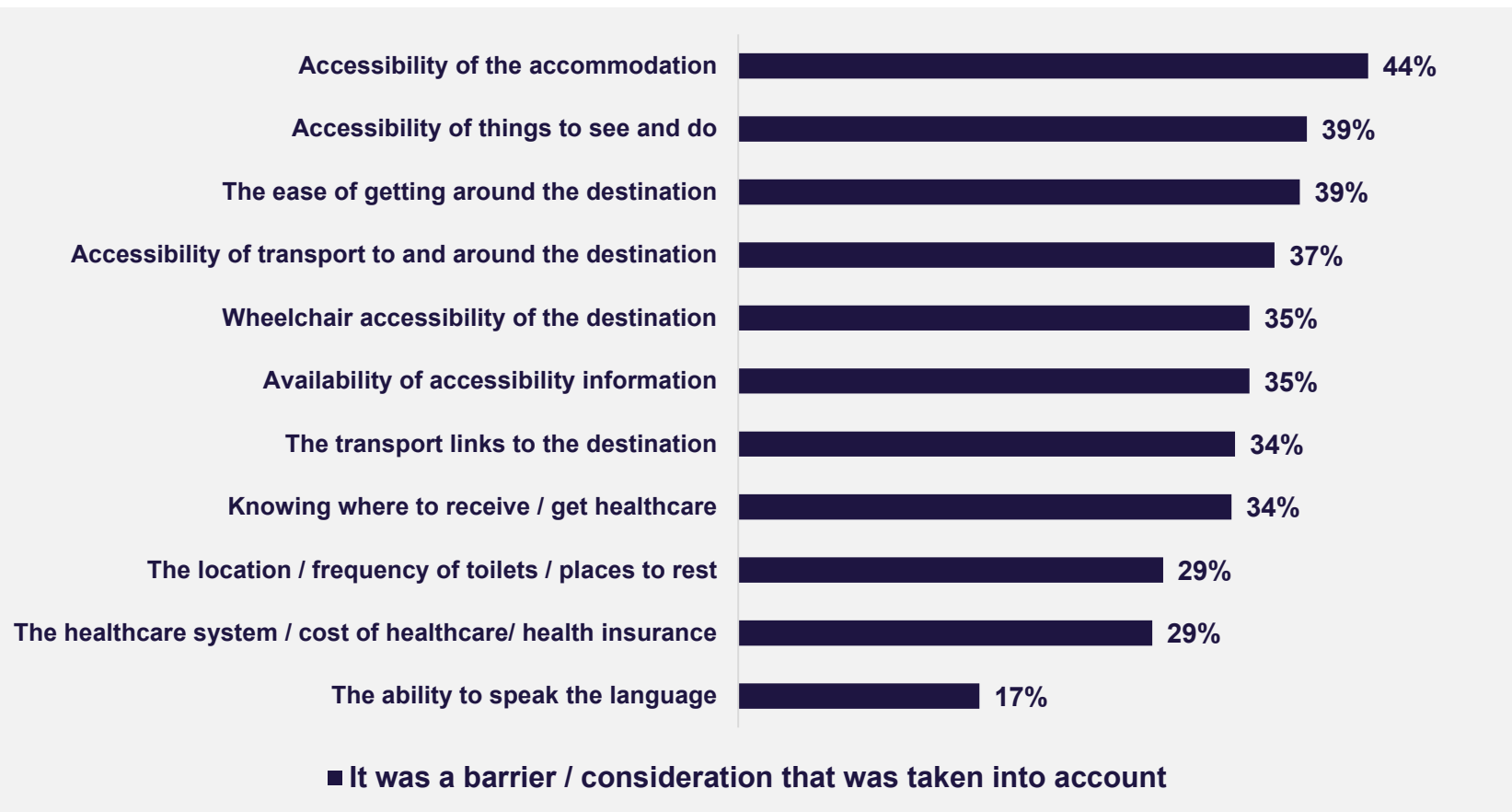**Those who believe the North York Moors would cater for the below needs are more likely to want to visit the North York Moors....**

- Physical intensity (ability to engage in physical activities)
- Ability to communicate/request what they need/would like

Alleviate fears of our target audiences ability to engage in physical activities in the North York Moors to drive desire to holiday

Also, make information on the accessibility of attractions easily available

Our target audience are looking for reassurance that their chosen destination allows them to access the accommodation, the attractions, the transport options and is easy to get around.

Barrier / consideration	%
Accessibility of the accommodation	44%
Accessibility of things to see and do	39%
The ease of getting around the destination	39%
Accessibility of transport to and around the destination	37%
Wheelchair accessibility of the destination	35%
Availability of accessibility information	35%
The transport links to the destination	34%
Knowing where to receive / get healthcare	34%
The location / frequency of toilets / places to rest	29%
The healthcare system / cost of healthcare/ health insurance	29%
The ability to speak the language	17%

■ It was a barrier / consideration that was taken into account

More than 2-in-3 of those with more accessibility requirements, felt these barriers were strong considerations for them

And highlight availability of step-free access and accessible toilets

Our target audience are striving to visit a destination that provides accessible toilets and does not have too many steps. This information needs to be signposted clearly on the destination website and fed into any partners VB/VE choose to work with.

share	Must have accessibility requirements in a destination
60%	Accessible toilets
57%	No or few steps
48%	Accommodation certified for my type of accessibility requirements
42%	Wheelchair access
41%	Facilities in accommodation to store medical supplies
39%	Staff who are trained in disability awareness
35%	Radar keys for unmanned toilets (equivalent to EuroKey)
33%	Visitor information / interpretation in alternative formats
30%	Care staff to accompany you and help with tasks

More accessibility requirements

Consider most of these elements as a must have, and a destination that cannot provide information on these requirements are unlikely to be considered

Fewer accessibility requirements

Require very few of these elements and see them as nice to haves that are unlikely to impact their decision-making process.

Some accessibility requirements

Consider accessible toilets and no or few steps as a must have, with the remaining accessibility requirements more of a nice to have.

C60. Accessibility desires. Sample size n=401

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A summary: Tightening our proposition

The target audience are looking for a destination that has accessible accommodation, attractions, transport and want to be assured they can move around the destination easily.

Our target group will look for a destination that can address their desire for no or few steps, accessible toilets and a destination that has accommodation that specialises in catering for their needs

A major barrier to the North York Moors emerges, that it is not seen as suitable for catering for physical requirements of our target audience.

Helmsley Castle – Credit: VisitBritain

Summary

A three-stage process in order to entice our target audience to visit the North York Moors

Building

Build and refresh brand awareness and associations amongst all prospects to help the brand come to mind in decision moments

Nudging

Nudge the decisions of in-market prospects by refreshing relevant associations closer to decision

Connecting

Connect buyers to brands with navigational signposts that make them easy to find & buy

Robin Hood's Bay © VBI
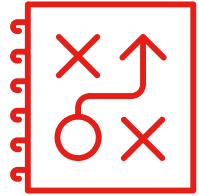
Build...

We need to build mental availability (awareness and associations) of the North York Moors. Our target audience are not currently aware of the North York Moors, nor do they know what its proposition is. Our first effort becomes building a stronger and more widely understood identity of the North York Moors amongst our target audience.

Nudge...

Identify those closer to purchase, working with partners and specialists, and reinforce core associations as they get closer to booking. Specifically, the accessibility of the awe-inspiring landscapes and scenery

Connect...

Our target audience have unique challenges when finding a destination, reflected in the channels they use to book, maximise salience in these channels - specialist accessibility providers, tour operators and package holiday providers

Appendix

Cleveland Way at sunset, paved walking path through heather along the cliffs of the coastline on the North York Moors, North Yorkshire, England. © VisitBritain/Thomas Heaton

A snapshot of our group with more accessibility requirements

Disability/Accessibility

Group 1 are a group that are typified by having a physical disability / accessibility requirements. They are likely to categorise themselves as having a physical disability not in a wheelchair (36%) or in a wheelchair (34%)

Barriers to travel

Their barriers to travel centre around their ability to access certain elements of their trip. This includes accommodation (82%), attractions (73%), transport (73%), the ease in which they can get from place to place (72%) and whether these elements are wheelchair accessible (71%) 100% of this group had something they had to consider

Accessibility Requirements

They are looking for a destination that has no or few steps (82%), accessible toilets (78%) and specific accommodation options that are certified for their needs (72%)

Motivations

They have a lot to consider when preparing for a holiday. Once they are sure the destination can cater for their requirements, they will look for a place where they can feel relaxed (74%) and switch off (63%) whilst experiencing great food and drink (66%)

Travel interest in the future

And for their next trip, they want to find a place where they can take part in culture activities (93%) and experience food, drink and entertainment (93%) as well as the scenery a destination has to offer (90%)

36%
are aware of the North York Moors, which is the highest of any of the personas

30%
of this persona are interested in visiting the North York Moors

Sample size n=174

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A snapshot of our group with fewer accessibility requirements

Disability/Accessibility

Typified by having a longer term disability. They have self-defined themselves as having a long-term illness or health condition (32%), arthritis or chronic conditions (27%) or a health condition not covered by our list (19%)

Accessibility Requirements

A small proportion require specific elements for their trip, including accessible toilets (32%), no or few steps (27%) and places to store medical supplies (19%). But mostly our target don't need a destination to provide many things for them

Motivations

Like our group with more accessibility requirements, they are looking for a destination where they can relax (75%) and switch off (65%) and experience great good and drink (60%)

Barriers to travel

Around 1-in-2 had a specific barrier to travel, and these are less severe and more typical of everyday travel including the transport links (19%), the weather (16%) and the ease of getting around (16%)

Travel interest in the future

And in the future, they are looking for a destination where they can experience scenery (97%), cultural activities (83%) and relax and switch off (83%)
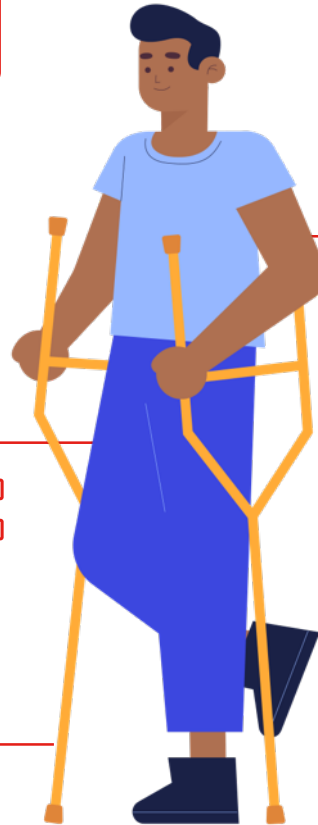
13%
Are aware of the North York Moors

11%
Are interested in visiting the NYM in the next year or two

Sample size n=63

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A snapshot of our group with some accessibility requirements

Accessibility Requirements
Whilst they don't have many barriers to travel, they require accessible toilets (51%), no or few steps (43%), places in the accommodation to store their medical supplies (34%) and that the accommodation is certified for their type of accessibility requirements (34%)

Disability/Accessibility
Has a mix of different accessibility / health conditions. Some describe themselves as having a long-term illness or health condition (37%) which others consider themselves as having a physical or mobility impairment (outside of a wheelchair, 31%). This persona does not easily fit into an accessibility / health condition

Motivations
Similar to the other personas, they look for a destination that makes them feel relaxed (71%), where they can switch off (63%) and experience great food and drink (59%)

Barriers to travel
3-in-4 had a specific barrier to travel. The main need for this group is knowing where to get / receive healthcare in the destination (18%) and the accessibility of the accommodation (17%)

Travel interest in the future
And they are interested in finding a destination with Scenery (95%) where they can relax and switch off (91%) amongst food, drink & nighttime entertainment (84%)

25%
are aware of the North York Moors

18%
Are interested in visiting the North York Moors in the next year or two

Sample size n=164

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They look for breaks that allow them to relax, switch off and experience great food and drink

Approximately 1-in-2 look for a destination that accommodates their needs suggesting this is a top of mind consideration for most tourists

Motivations

demonstrates the elements of a trip that our target audience looks for when making a decision about a destination

Motivation	%
Feeling relaxed	73%
Switching off from everyday life	63%
Experiencing great food &; drink	62%
Spending quality time with friends or family	48%
A place that accommodates me and my needs	46%
Getting around the destination easily	41%

Motivation	%
Feeling safe	41%
Discovering a culture that is different to mine	37%
The familiarity of the destination	28%
Getting off the beaten track	24%
Trying/learning something new	16%
Experiencing some adventure	15%

Our group with more accessibility requirements have a large amount of requirements they need to consider for their trips

% who feel the below are a barrier / consideration they have to take into account when planning / booking a trip

More accessibility requirements

Category	%
Accessibility of the accommodation	82%
Accessibility of transport to and around the destination	73%
Accessibility of things to see and do	73%
The ease of getting around the destination	72%
Wheelchair accessibility of the destination, accommodation and places to visit	71%
Availability of accessibility information	69%
The transport links to the destination	63%
Knowing where to receive / get healthcare	59%
The location / frequency of toilets / places to rest	53%
The healthcare system / cost of healthcare/ health insurance	53%
The Cost	48%
The cuisine	36%
The weather	36%
The ability to speak the language	27%
Other	23%

B30. Barriers; sample size n=171

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Our group with fewer accessibility requirements have considerations are more logistic focused and less accessibility focused

Fewer accessibility requirements

% who feel the below are a barrier / consideration they have to take into account when planning / booking a trip

Consideration	%
The transport links to the destination	19%
The ease of getting around the destination	16%
The weather	16%
The Cost	14%
Accessibility of things to see and do	10%
Availability of accessibility information	10%
Knowing where to receive / get healthcare	10%
The cuisine	10%
Other	8%
Accessibility of the accommodation	6%
Accessibility of transport to and around the destination	6%
The location / frequency of toilets / places to rest	6%
Wheelchair accessibility of the destination, accommodation and places to visit	5%
The healthcare system / cost of healthcare/ health insurance	3%
The ability to speak the language	0%

B30. Barriers; sample size n=63

And those with some accessibility requirements are most likely to need to know where they can receive healthcare

Some accessibility requirements

% who feel the below are a barrier / consideration they have to take into account when planning / booking a trip

Category	%
Knowing where to receive / get healthcare	18%
Accessibility of the accommodation	17%
The Cost	16%
Accessibility of things to see and do	15%
The weather	15%
The ease of getting around the destination	13%
The location / frequency of toilets / places to rest	13%
The healthcare system / cost of healthcare/ health insurance	13%
The ability to speak the language	12%
Accessibility of transport to and around the destination	11%
The transport links to the destination	10%
Availability of accessibility information	10%
Wheelchair accessibility of the destination, accommodation and places to visit	9%
The cuisine	9%
Other	7%

Interest in a trip to Great Britain is highest amongst our target audience with more accessibility requirements

Propensity to visit (T3B)

Germany: MAR* 58%, FAR 37%, SAR 31%
Spain: MAR* 42%, FAR 30%, SAR 29%
Italy: MAR* 43%, FAR 35%, SAR 23%
The Netherlands: MAR* 43%, FAR 28%, SAR 36%
France: MAR* 32%, FAR 16%, SAR 20%
Great Britain: MAR* 27%, FAR 14%, SAR 16%
Ireland: MAR* 23%, FAR 8%, SAR 15%
USA: MAR* 21%, FAR 8%, SAR 9%

■MAR* ■FAR ■SAR
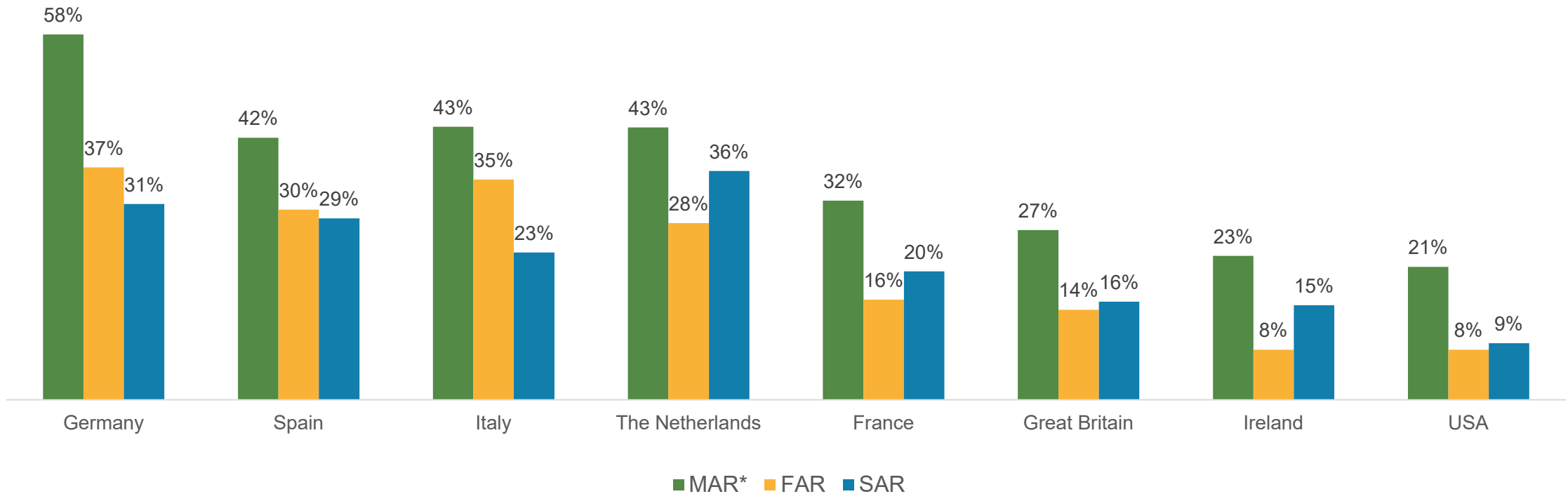
A90. Propensity to visit. * MAR (More accessibility requirements sample size n=171 / FAR (Fewer accessibility requirements) sample size n=63 / SAR (some accessibility requirements) sample size n=167

Our different personas take a similar amount of time to plan their trips but use a range of different touchpoints

Inspiration phase (length of time)

Less than one week: MAR* 10%, FAR 14%, SAR 13%
1 to 2 weeks: MAR* 40%, FAR 29%, SAR 35%
3 to 4 weeks: MAR* 21%, FAR 13%, SAR 23%
1 to 2 months: MAR* 11%, FAR 13%, SAR 12%
3 to 6 months: MAR* 8%, FAR 5%, SAR 5%
Over 6 months and up to 1 year: MAR* 2%, FAR 3%, SAR 1%
Over 1 year: MAR* 1%, FAR 2%, SAR 1%
Don't know / Not sure: MAR* 6%, FAR 22%, SAR 11%

■MAR* ■FAR ■SAR

Inspiration phase (resources used)

	MAR*	FAR*	SAR*
The destination's official website	55%	60%	57%
Accommodation providers' websites / apps	45%	57%	35%
Travel review websites / apps (e.g. TripAdvisor)	44%	38%	40%
Accessibility specialists	40%	8%	19%
Attraction providers' websites / apps	39%	29%	29%
Brochures / leaflets	37%	29%	35%
Travel guides (offline / books)	35%	35%	32%
In person travel agents (an offline store / in an office)	34%	13%	35%
Tour operators / travel planners	34%	17%	27%
Social media	28%	14%	30%
Through friends and family	26%	10%	24%
Other (please specify)	1%	10%	2%

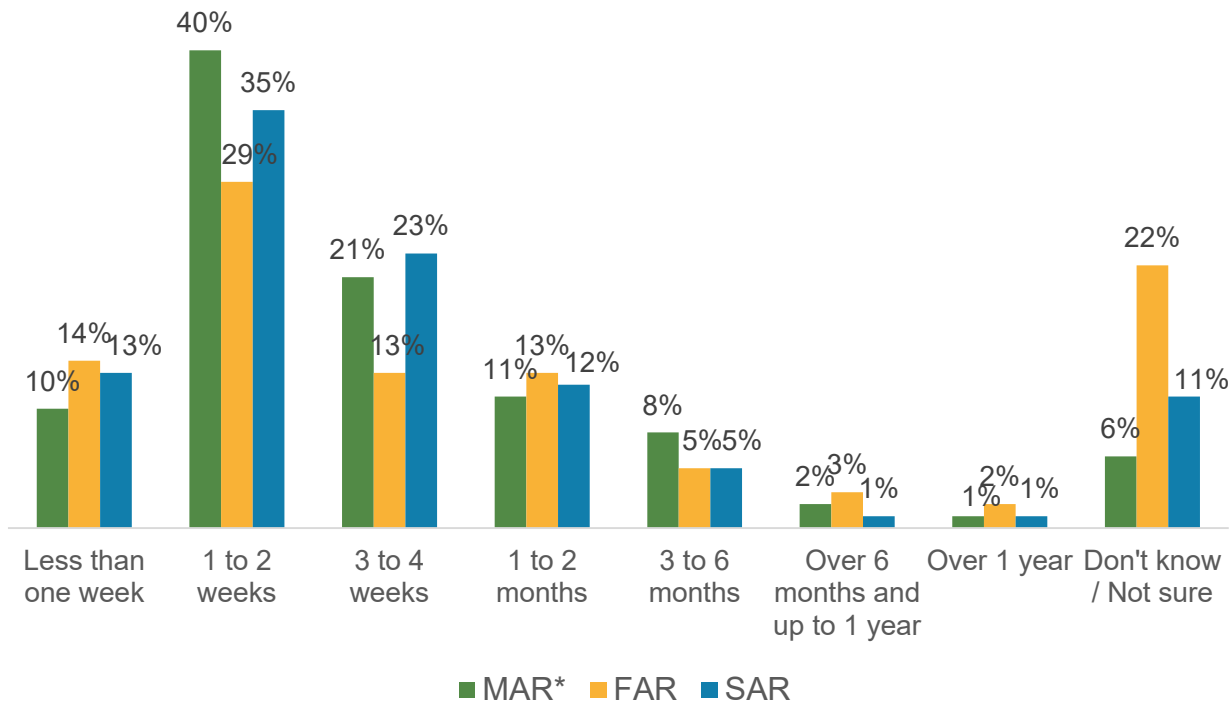D10. Inspiration Phase (length of time); D20. Inspiration phase (resources used) * MAR (More accessibility requirements sample size n=171 / FAR (Fewer accessibility requirements) sample size n=63 / SAR (some accessibility requirements) sample size n=167

At the inspiration stage, our target are aiming to understand how to get around

Inspiration Phase - Consideration

	MAR*	FAR	SAR
The cost	52%	52%	54%
The weather	39%	44%	49%
Wheelchair accessibility of the destination	49%	8%	18%
The ease of getting around the destination	57%	38%	41%
The location / frequency of toilets / places to rest	54%	11%	40%
The cuisine	39%	32%	35%
The ability to speak the language	25%	16%	21%
The transport links to the destination	53%	37%	43%
The healthcare system / cost of healthcare	46%	19%	31%
Pre-book priority access / queue jumping access	30%	11%	26%
Step free access	69%	16%	34%
Accommodation that has specific facilities for accessibility needs	14%	3%	6%
Other	1%	0%	1%
None of the above	1%	11%	5%

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Once they have spent time planning, personas 1 and 3 are more impulsive when booking their trip

Booking Phase (length of time)

Legend: MAR, FAR, SAR

Less than one week	1 to 2 weeks	3 to 4 weeks	1 to 2 months	3 to 6 months	Over 6 months and up to 1 year	Over 1 year	Don't know / Not sure
3% (MAR)	18% (MAR)	18% (MAR)	17% (MAR)	29% (MAR)	7% (MAR)	0% (MAR)	7% (MAR)
5% (FAR)	6% (FAR)	3% (FAR)	14% (FAR)	25% (FAR)	13% (FAR)	5% (FAR)	29% (FAR)
2% (SAR)	18% (SAR)	10% (SAR)	23% (SAR)	27% (SAR)	5% (SAR)	1% (SAR)	13% (SAR)
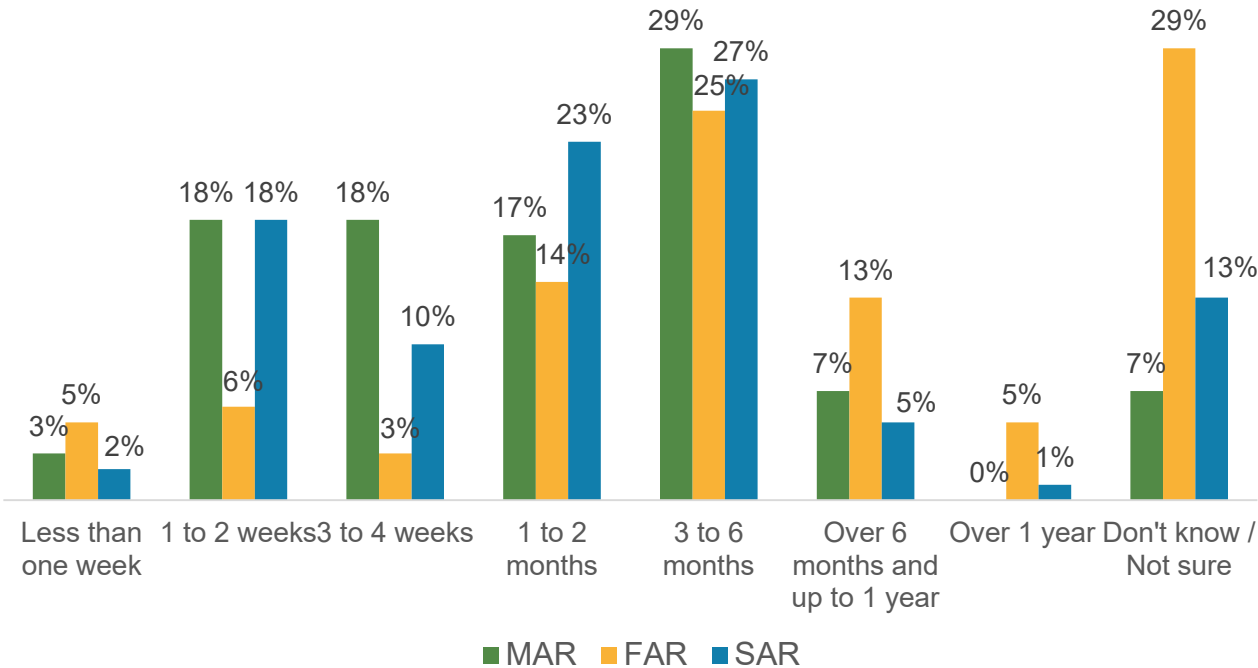
Booking phase (resources used)

	MAR*	FAR	SAR
Destination website	32%	33%	38%
Directly with accommodation providers' website	33%	37%	34%
Tour operators / package holiday providers	32%	21%	26%
Directly with accommodation booking platform (e.g. Airbnb / Booking.com)	28%	33%	23%
Specialist tour operator / package holiday providers catering for accessibility needs	36%	6%	21%
An online travel agent or tour operator specializing in accessibility trips (where you book everything in one go as a package)	32%	14%	19%
An online travel agent or tour operator (where you book everything in one go as a package)	25%	21%	21%
An online travel agent or tour operator (where you book individual experiences)	25%	13%	18%
An online travel agent or tour operator specializing in accessibility trips (where you book individual experiences)	26%	6%	16%
Directly with a travel provider (airline, ferry, train)	20%	14%	15%
Flight comparison sites (e.g. Skyscanner / Kayak)	16%	16%	10%
None of the above	3%	21%	5%
Other (please specify)	2%	2%	2%

D50. Booking phase Phase (length of time); D60. Booking phase (resources used) * MAR (More accessibility requirements sample size n=171 / FAR (Fewer accessibility requirements) sample size n=63 / SAR (some accessibility requirements) sample size n=167

Our targets considerations do not change when they aim to book

Booking phase considerations

Booking phase considerations	MAR*	FAR	SAR
Wheelchair accessibility of the destination	50%	6%	20%
Step free access	63%	19%	32%
The location / frequency of toilets / places to rest	51%	14%	31%
The transport links to the destination	51%	27%	37%
The ease of getting around the destination	52%	32%	34%
The cost	48%	52%	52%
The healthcare system / cost of healthcare	32%	16%	23%
The weather	36%	49%	40%
Priority access / queue jumping access	25%	8%	12%
The cuisine	32%	24%	34%
The ability to speak the language	18%	13%	18%
Accommodation that has specific facilities for accessibility needs (please specify)	8%	2%	4%
None of the above	3%	14%	8%
Other (please specify)	1%	0%	2%
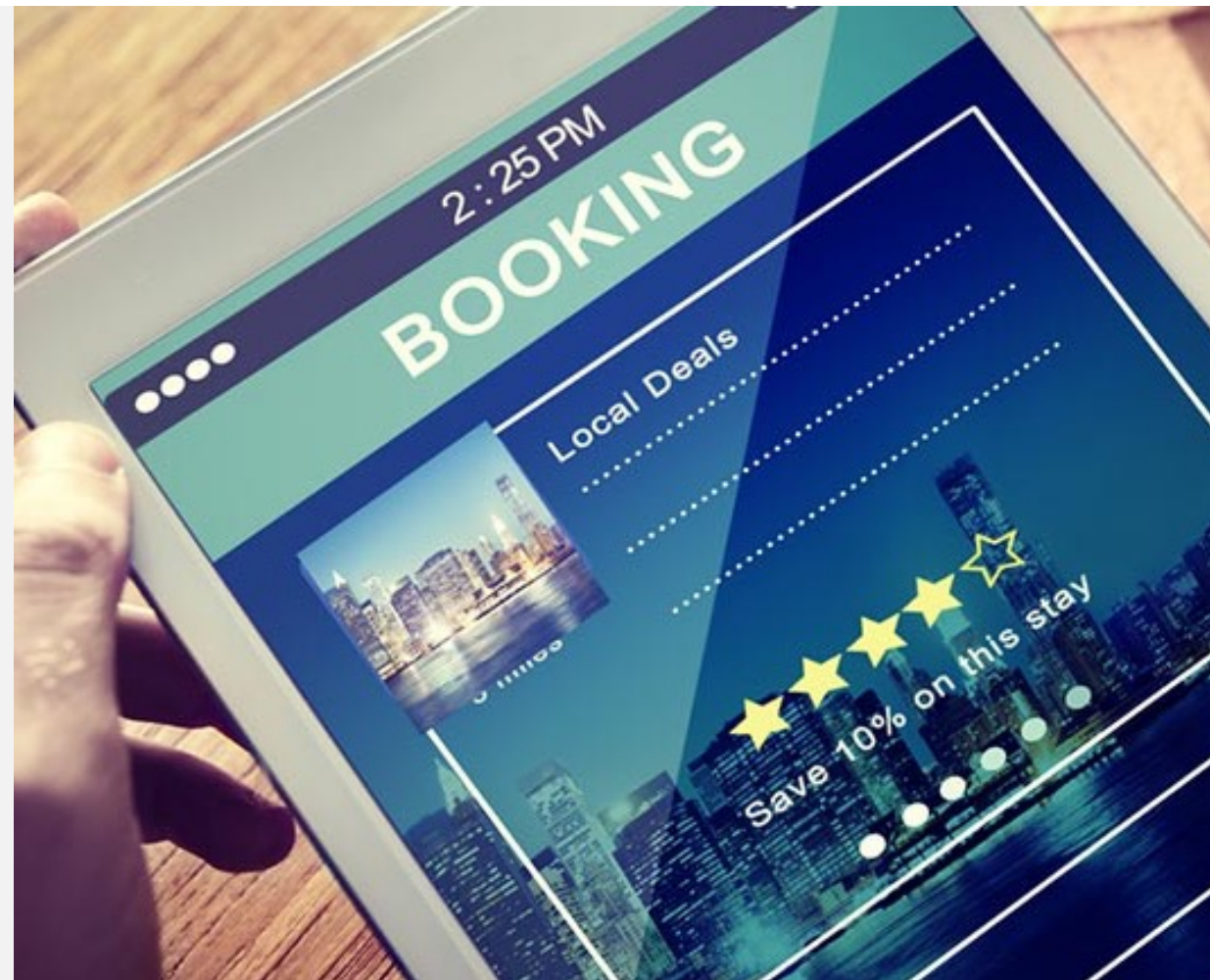
Staff and local establishments need to be informed on the destination, and well stocked with leaflets

On the Ground (resources used)

On the Ground (resources used)	MAR	FAR	SAR
Local staff (at a hotel or restaurant)	57%	41%	46%
Brochures / leaflets / books	50%	41%	48%
Destination websites	46%	46%	44%
Google maps	39%	37%	41%
Information kiosks / National Park Visitor centres	38%	29%	29%
Travel review websites / apps	34%	25%	27%
Friends and family	30%	10%	21%
The members of group travelling with	32%	11%	22%
In person travel agents/ tour operator	31%	10%	16%
Social Media	18%	6%	20%
None of the above	2%	16%	4%
Other (please specify)	1%	5%	1%

Sharing & Advocates

Sharing & Advocates	MAR	FAR	SAR
Talk about trip in conversation with friends in person	67%	54%	60%
Share experiences via social media (Facebook, Twitter, Instagram, etc.)	37%	30%	33%
Share trip experiences via email, text or other written medium (not social media)	26%	16%	24%
Talk to others about the trip over the phone or via Skype or similar	41%	19%	30%
Post a review about trip on a website	30%	13%	23%
Share trip experiences in another way	19%	8%	14%
None of the above	7%	27%	9%

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Our target audience are loyal to destinations they have visited before

Germany, Spain, Italy and France are our target audience's favourite destinations, and are of most interest in the future. Britain has not received much past visitation but performs better for future consideration on levels similar to France.

Destination loyalty

Scatter plot. X-axis: % visited country in the past 5 years (0% to 25%). Y-axis: % wishing to visit country in next 3 years (0% to 25%).

Data points:
- Spain (~15.5%, 23%)
- Germany (~21%, 22%)
- Italy (~17.5%, 20%)
- France (~14%, 18%)
- NET: GB (~6.5%, 17%)
- Netherlands (~8.5%, 14%)
- Greece (~5%, 9%)
- Belgium (~13.5%, 9%)
- Austria (~9.5%, 8%)
- Sweden (~3.5%, 6%)
- Switzerland (~4%, 6%)
- Turkey (~5%, 6%)
- Denmark (~6.5%, 6%)
- Norway (~2.5%, 5%)
- Portugal (~5%, 5%)
- Poland (~4.5%, 4%)
- Croatia (~3%, 3%)
- Egypt (~2.5%, 2%)
- Hungary (~2.5%, 1%)
- Czech Republic (~3%, 1%)

And are looking for outdoor experiences that promote the uniqueness of the destination

Approximately 1-in-2 look for a destination that accommodates their needs suggesting this is a top of mind consideration for most tourists

Travel interest in the future

showcases the elements that our target audience are looking for when it comes to planning their next trip, the elements that are likely to be important going forward

71%
Eat local delicacies

67%
Enjoy the great outdoors

60%
Experience souvenir/ local products shopping

59%
Visiting parks / gardens

57%
Escape my everyday routine

55%
Historical sites/ heritage wonders

55%
View ancient / traditional buildings / stories / artefacts

52%
Experience coastline and islands

48%
Visit lakes / mountains / forest

48%
Improve my physical/mental wellbeing

46%
Experience a culture different to my own

44%
Visit beaches

41%
Spend quality time with friends or family

37%
Socialise with local people

34%
Meet new people on my travels

34%
See wildlife in their natural habitat

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Sign posting the <u>accessibility</u> of the North York Moors is key

Our target audience are looking for a destination that allows them to access the accommodation, the attractions, the transport options and is easy to get around.

	Barrier / consideration	Came to mind	Not relevant
Accessibility of the accommodation	44%	33%	23%
Accessibility of things to see and do	39%	38%	22%
The ease of getting around the destination	39%	41%	20%
Accessibility of transport to and around the destination	37%	40%	23%
Wheelchair accessibility of the destination	35%	27%	38%
Availability of accessibility information	35%	42%	22%
The transport links to the destination	34%	42%	24%
Knowing where to receive / get healthcare	34%	44%	22%
The location / frequency of toilets / places to rest	29%	43%	27%
The healthcare system / cost of healthcare/ health insurance	29%	41%	30%
The ability to speak the language	17%	37%	47%

■ It was a barrier / consideration that was taken into account

■ It was something that came to mind but did not impact the planning / booking process

■ It was not relevant / not something considererd

More than 2-in-3 of those with many accessibility needs, felt the highlighted barriers were strong considerations for them

B30. Barriers Sample size n=401

And COVID-19 has impacted our target's future intention to travel

With our target audience likely to still look for clean, government approved destinations that have a flexible cancelation policy and have low COVID-19 rates at the time of planning

Will be a consideration

Showcases the COVID relevant sacrifices our target has had to make, that they think they will still have to make in the future

Impact of COVID-19

Showcases the COVID-19 relevant sacrifices our target has had to make, that they think they will still have to make in the future

45%
Whether social distancing rules are in place

57%
COVID rates at the time of planning

40%
The % of the population vaccinated

57%
Governmental approval of destination

48%
Whether mask regulations are in place

53%
COVID rates at the time of booking

35%
Population density of the destination

60%
Flexible cancelation policies

58%
Cleanliness of the destination

54%
If a vaccination is required for travel

53%
If a COVID test is required to enter the destination

16%
Other

B50. Impact of COVID-19 Sample size n=401

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Our target are most interested in visiting Whitby or taking the North York Moors Railway

Interest in NYM activities

Take the North Yorkshire Moors Railway - A trip across the Moors by train, seeing all the sites from the comfort of your seat
- SAR: 53%
- FAR: 49%
- MAR: 51%
- Total Sample: 52%

Visit historic Whitby - Whitby is a historic seaside town where Bram Stoker's Dracula takes place
- SAR: 49%
- FAR: 41%
- MAR: 54%
- Total Sample: 50%

Explore the market town of Helmsley with its five-acre Helmsley Walled Garden and Helmsley Castle
- SAR: 49%
- FAR: 48%
- MAR: 47%
- Total Sample: 48%

Visit Castle Howard, one of Britain's finest historic houses
- SAR: 47%
- FAR: 37%
- MAR: 44%
- Total Sample: 44%

Visit a quaint seaside village and find fossils on the shoreline with a local expert
- SAR: 44%
- FAR: 37%
- MAR: 44%
- Total Sample: 43%

Take a walk from Sutton Bank National Park Centre to the White Horse of Kilburn and 'England's Finest View'
- SAR: 40%
- FAR: 37%
- MAR: 44%
- Total Sample: 41%

Explore the vast Dalby Forest by bike on a range of trails
- SAR: 38%
- FAR: 48%
- MAR: 32%
- Total Sample: 37%

None of these
- SAR: 8%
- FAR: 22%
- MAR: 7%
- Total Sample: 10%

Legend: ■ SAR ■ FAR ■ MAR ■ Total Sample

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Mostly, our target audience are interested in booking their trip as a package, which is strongest amongst our target with more accessibility requirements

Interest in booking method

I would want to do all of these things and would expect them to be available as a trip/package
- SAR: 25%
- FAR: 27%
- MAR: 32%
- Total Sample: 29%

I would want to do all of these things but would want to book them myself
- SAR: 30%
- FAR: 20%
- MAR: 27%
- Total Sample: 27%

I would want to do some of these things but would expect them to be available as a trip/package
- SAR: 20%
- FAR: 22%
- MAR: 25%
- Total Sample: 22%

I would want to do some of these things but would want to book them myself
- SAR: 21%
- FAR: 27%
- MAR: 11%
- Total Sample: 17%

I would only want to do one of these things on a trip
- SAR: 2%
- FAR: 2%
- MAR: 3%
- Total Sample: 2%

Not sure
- SAR: 2%
- FAR: 2%
- MAR: 1%
- Total Sample: 2%

Legend: ■ SAR ■ FAR ■ MAR ■ Total Sample

NET: Book as a package – 51%

NET: Book themselves – 45%

Challenge perceptions of inaccessible moorland and coast

Our strongest asset, the natural beauty the North York Moors has to offer, automatically leads to doubts around accessibility. Be specific on how those with accessibility needs can enjoy the full experience, not a subset of the area.

The ability to enjoy experiences and be accepted — **68%**

The ability to communicate and understand the local people — **67%**

The ability and willingness to move around freely, engage in physical activies and move around indepenedently — **45%**

Our group with more accessibility requirements is less likely to believe that the North York Moors would be a destination that caters for their physical requirements

kubi kalloo

VisitBritain

VisitEngland

Not only do our target worry about their requirements, COVID-19 is still hampering their desire to visit the North York Moors

COVID-19 fears

Getting around the destination

Accessibility requirements

A large proportion of our target cite the COVID-19 pandemic as a major barrier to their desire to travel to the North York Moors.

This is an easy win for the North York Moors. Showcasing what they have done and what they will continue to do to keep COVID-19 cases down is key to ensuring our target will consider the destination

Our target audience are unique and need to consider how easy they will find getting around a destination before booking.

The North York Moors needs to sign post how our target can access different parts of the area, and what a trip for those with accessibility requirements would look like

And in some cases, our target have very complex accessibility requirements. In these instances, they are worried that they will not be able to experience the destination to its fullest.

Communicating how to get around the North York Moors in a wheelchair, or for major accessibility requirements is also key in alleviating concerns.

The current state of affairs regarding COVID 19. This is important to me. – Dutch respondent

If there is a COVID outbreak again – German Respondent

Walking long distances is not possible and on uneven terrain such as stones is very difficult

Having to walk too much

Wheelchair is available and if there are special places to get there with a wheelchair

Whether everything can be done with a wheelchair

Destinations that allow our target audience to experience their destination to the fullest are remembered fondly

The destination name changes, but the sentiment remains, that destinations that were fully accessible to our target audience were top of mind and resonant to our target audience

Why was this destination suitable?	Destinations of note

Why was this destination suitable?

"In the USA, barrier-free rooms are almost always available in hotels, as are shops."

"There was a lot of information about accessible accommodation and activities that are also suitable for wheelchair users.."

"it starts with accommodation and continues with access to sightseeing opportunities; often only parts of the area are barrier-free"

"This was a bus trip to Scotland where everything was taken care of down to the last detail!."

Referring to a boat: "no thresholds, lifts, wheelchair accessible toilets. Help with going to the toilet."

"Austria, presence of lifts, parking and being able to get everywhere by car."

Destinations of note

Italy	Scotland
Austria	England
Spain	Scandinavia
Croatia	Israel
USA	
Turkey	
Switzerland	
Greece	
China	