Project Accessible
An exploration of the North York Moors’ suitability for accessible tourism

Prepared for VisitBritain

View of NYM from Sutton Bank © Mike Kipling NYMNHP
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?
### Germany Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nordrhein-Westfalen</td>
<td>20%</td>
</tr>
<tr>
<td>Bayern</td>
<td>12%</td>
</tr>
<tr>
<td>Baden-Württemberg</td>
<td>10%</td>
</tr>
<tr>
<td>Niedersachsen</td>
<td>8%</td>
</tr>
<tr>
<td>Brandenburg</td>
<td>8%</td>
</tr>
<tr>
<td>Berlin</td>
<td>8%</td>
</tr>
<tr>
<td>Schleswig-Holstein</td>
<td>7%</td>
</tr>
<tr>
<td>Rheinland-Pfalz</td>
<td>6%</td>
</tr>
<tr>
<td>Hessen</td>
<td>6%</td>
</tr>
<tr>
<td>Sachsen</td>
<td>5%</td>
</tr>
<tr>
<td>Sachsen-Anhalt</td>
<td>3%</td>
</tr>
<tr>
<td>Hamburg</td>
<td>3%</td>
</tr>
<tr>
<td>Saarland</td>
<td>2%</td>
</tr>
<tr>
<td>Mecklenburg-Vorpommern</td>
<td>2%</td>
</tr>
<tr>
<td>Thüringen</td>
<td>2%</td>
</tr>
<tr>
<td>Bremen</td>
<td>2%</td>
</tr>
</tbody>
</table>

### 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%
    - None of these: 7%
    - Changed jobs (Full or part time): 7%
    - Bought a house/flat: 6%
    - Got married: 1%
    - Completed University: 1%

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

### Household income

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>€ 150,000 or more</td>
<td>3%</td>
</tr>
<tr>
<td>€ 140,000 to € 149,999</td>
<td>1%</td>
</tr>
<tr>
<td>€ 130,000 to € 139,999</td>
<td>1%</td>
</tr>
<tr>
<td>€ 120,000 to € 129,999</td>
<td>1%</td>
</tr>
<tr>
<td>€ 110,000 to € 119,999</td>
<td>1%</td>
</tr>
<tr>
<td>€ 100,000 to € 109,999</td>
<td>2%</td>
</tr>
<tr>
<td>€ 90,000 to € 99,999</td>
<td>5%</td>
</tr>
<tr>
<td>€ 80,000 to € 89,999</td>
<td>2%</td>
</tr>
<tr>
<td>€ 70,000 to € 79,999</td>
<td>5%</td>
</tr>
<tr>
<td>€ 60,000 to € 69,999</td>
<td>10%</td>
</tr>
<tr>
<td>€ 50,000 to € 59,999</td>
<td>10%</td>
</tr>
<tr>
<td>€ 40,000 to € 49,999</td>
<td>16%</td>
</tr>
<tr>
<td>€ 30,000 to € 39,999</td>
<td>23%</td>
</tr>
<tr>
<td>€ 20,000 to € 29,999</td>
<td>13%</td>
</tr>
<tr>
<td>Under € 20,000</td>
<td>8%</td>
</tr>
</tbody>
</table>

### 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.
Who did we speak to? - Netherlands

**Gender**
- Female: 44%
- Male: 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: 86%
- Expected to do in the next 12 months: 10%
- Have done in the past 3 years: 90%
- Traveled to a foreign country on holiday: 88%
- None of these: 10%
- Changed jobs (Full or part time): 14%
- Bought a house/flat: 17%
- Got married: 9%
- Completed University: 7%

**Household income**
- € 150,000 or more: 2%
- € 140,000 to € 149,999: 1%
- € 130,000 to € 139,999: 1%
- € 120,000 to € 129,999: 2%
- € 110,000 to € 119,999: 3%
- € 100,000 to € 109,999: 4%
- € 90,000 to € 99,999: 2%
- € 80,000 to € 89,999: 3%
- € 70,000 to € 79,999: 6%
- € 60,000 to € 69,999: 4%
- € 50,000 to € 59,999: 9%
- € 40,000 to € 49,999: 12%
- € 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

- A long-term illness or health condition which may reduce the ability to carry out day to day activities
- Arthritis or chronic conditions that limit physical capabilities
- Physical or mobility impairment (non-wheelchair user)
- Physical or mobility impairment (wheelchair user)
- A health condition of impairment not covered by the categories listed
- A mental health condition (e.g. depression, schizophrenia, anxiety)
- Vision – partially sighted
- Hearing – partial hearing loss
- A specific learning difficulty or intellectual disability (e.g. dyslexia...)
- Dementia (e.g. Alzheimer’s disease)
- A social/communication impairment (e.g. An autistic spectrum condition)
- Hearing – deaf
- Prefer not to say
- Vision - blind

The Netherlands: 30% 39%
Germany: 27% 34%

The Netherlands
Germany

A60. Disability / health conditions Sample size n=401
Understanding accessibility needs as they relate to travel to NYM
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

<table>
<thead>
<tr>
<th>Impairment / health condition</th>
<th>More Accessibility requirements n=174</th>
<th>Fewer Accessibility requirements n=63</th>
<th>Some Accessibility requirements n=164</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Has to consider:</strong></td>
<td>Accessibility of the accommodation</td>
<td>Transport links</td>
<td>Where they can get healthcare</td>
</tr>
<tr>
<td></td>
<td>Accessibility of transport to and around the destination</td>
<td>Weather</td>
<td>Accessibility of the accommodation</td>
</tr>
<tr>
<td></td>
<td>Accessibility of things to see and do</td>
<td>Ease of getting around</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The ease of getting around the destination</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Barriers to travel</th>
<th>Look for a destination with:</th>
<th>Look for a destination with:</th>
<th>Look for a destination with:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No or few steps</td>
<td>Accessible toilets</td>
<td>Accessible toilets</td>
</tr>
<tr>
<td></td>
<td>Accessible toilets</td>
<td>No or few steps</td>
<td>No or few steps</td>
</tr>
<tr>
<td></td>
<td>Accommodation options certified for their needs</td>
<td>Places to store medical supplies</td>
<td>Places to store medical supplies</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Accessibility requirements</th>
<th>Want to:</th>
<th>Want to:</th>
<th>Want to:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Feel relaxed</td>
<td>Feel relaxed</td>
<td>Feel relaxed</td>
</tr>
<tr>
<td></td>
<td>Switch off</td>
<td>Switch off</td>
<td>Switch off</td>
</tr>
<tr>
<td></td>
<td>Experience great food and drink</td>
<td>Experience great food and drink</td>
<td>Experience great food and drink</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Holiday motivations</th>
<th>Looking for a destination that has:</th>
<th>Looking for a destination that has:</th>
<th>Looking for a destination that has:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Cultural Activities</td>
<td>Scenery</td>
<td>Scenery</td>
</tr>
<tr>
<td></td>
<td>Food, drink and entertainment</td>
<td>Cultural activities</td>
<td>Cultural activities</td>
</tr>
<tr>
<td></td>
<td>Scenery</td>
<td>Relax and switch off</td>
<td>Relax and switch off</td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>Travel interest in the future</th>
<th>B70. Travel Interest in the Future Sample size n=401</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scenery</td>
<td>93%</td>
</tr>
<tr>
<td>Relaxation / Switching off</td>
<td>89%</td>
</tr>
<tr>
<td>Cultural activities</td>
<td>88%</td>
</tr>
<tr>
<td>People/Culture</td>
<td>87%</td>
</tr>
<tr>
<td>Recreational Activities</td>
<td>77%</td>
</tr>
</tbody>
</table>

This does not significantly differ between our groups, according to accessibility needs.

German respondents are more likely to be interested in relaxing/switching off.
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)

- **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)

- **Germany**: 22%
- **Italy**: 20%
- **Spain**: 23%
- **France**: 18%
- **Belgium**: 9%
- **Austria**: 8%
- **NET: GB**: 14%
- **Denmark**: 17%
- **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)

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B10. Countries visited in the past 5 years; B60. Future travel intention Sample size n=401 *Results from VisitBritain global segmentation
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

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
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.
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.

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

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
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

- 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 separately): 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
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**

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

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 destination 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.

D80. On the ground (resources used), D90. Sharing & Advocates Sample size n=401
And what do they know about the North York Moors?
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

<table>
<thead>
<tr>
<th>Awareness Of the North York Moors</th>
<th>More accessibility requirements</th>
<th>Fewer accessibility requirements</th>
<th>Some accessibility requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>+8% vs. total</td>
<td>-15% vs. total</td>
<td>-3% vs. total</td>
</tr>
<tr>
<td></td>
<td>“It’s a green plain with moors, castles, in the middle of Great Britain.”</td>
<td>“A beautiful area in the middle of London and Edinburgh.”</td>
<td>“Northern England National Park, Hills and Uplands.”</td>
</tr>
</tbody>
</table>

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

C10. Awareness of the North York Moors; C20. Open end knowledge of the North York Moors Sample size n=401
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

- 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

C50. Perceptions of the NYM Sample size n=111
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

<table>
<thead>
<tr>
<th>Interest in visiting the North York Moors</th>
<th>Total</th>
<th>Aware of NYM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>22%</td>
<td>49%</td>
</tr>
<tr>
<td>Why do they not want to visit?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>More accessibility requirements</th>
<th>+8%</th>
</tr>
</thead>
<tbody>
<tr>
<td>It is too difficult for me</td>
<td></td>
</tr>
<tr>
<td>Cliffs and things like that are</td>
<td></td>
</tr>
<tr>
<td>problematic</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Fewer accessibility requirements</th>
<th>-11%</th>
</tr>
</thead>
<tbody>
<tr>
<td>The reason is that my autistic</td>
<td></td>
</tr>
<tr>
<td>spectrum disorder makes me</td>
<td></td>
</tr>
<tr>
<td>overstimulated and tired very</td>
<td></td>
</tr>
<tr>
<td>easily and the North York Moors</td>
<td></td>
</tr>
<tr>
<td>is a terribly distant destination.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Some accessibility requirements</th>
<th>-4%</th>
</tr>
</thead>
<tbody>
<tr>
<td>I don’t think that I can</td>
<td></td>
</tr>
<tr>
<td>physically do that.</td>
<td></td>
</tr>
<tr>
<td>Requires a lot of physical</td>
<td></td>
</tr>
<tr>
<td>effort.</td>
<td></td>
</tr>
</tbody>
</table>

“England doesn’t attract me so much because of the climate.”

“It is not my favourite destination at the moment.”

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

C30. Propensity to visit the North York Moors, C40. Reason why not interested in NYM C30. Sample size n=401; C40. N=197
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

<table>
<thead>
<tr>
<th>High Effort = High Reward</th>
<th>Low Effort = High Reward</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not associated with NYM, of interest to our target</td>
<td>Associated with NYM, of interest to our target</td>
</tr>
</tbody>
</table>

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 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 and are not 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.

Not associated with NYM, not interesting to our target

C50. Perceptions of the NYM, C55. Motivations from a destination
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

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

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

C50. Perceptions of the NYM, C55. Motivations from a destination; Sample size n=401
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.

Regression model of impact of C50. Perceptions of the NYM on C30. Propensity to visit; Sample size n=401
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.

<table>
<thead>
<tr>
<th>Those who must consider the below are less likely to want to visit the North York Moors...</th>
<th>Those who believe the North York Moors would cater for the below needs are more likely to want to visit the North York Moors...</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Accessibility of the accommodation</td>
<td>• Physical intensity (ability to engage in physical activities)</td>
</tr>
<tr>
<td></td>
<td>• Ability to communicate/request what they need/would like</td>
</tr>
</tbody>
</table>

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

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

Regression model of impact of C70. Accessibility requirements and B30. Barriers on C30. Propensity to visit
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.

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

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

B30. Barriers Sample size n=401 – More detail available in the appendix
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.

### Must have accessibility requirements in a destination

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

- **Consider most of these elements as a must have**, and a destination that cannot provide information on these requirements are unlikely to be considered.
- **Require very few of these elements and see them as nice to haves that are unlikely to impact their decision-making process.**
- **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
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.
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
A three-stage process in order to entice our target audience to visit the North York Moors (1/3)

**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.
A three-stage process in order to entice our target audience to visit the North York Moors (2/3)

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
A three-stage process in order to entice our target audience to visit the North York Moors (3/3)

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.

Robin Hood’s Bay © VBI
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%)

Sample size n=174
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%).

**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%).

**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 food and drink (60%).

**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%).

Sample size n=63

- 13% are aware of the North York Moors
- 11% are interested in visiting the NYM in the next year or two
A snapshot of our group with some accessibility requirements

**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.

**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%).

**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%).

**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%).

**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%).

Sample size n=164
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

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feeling relaxed</td>
<td>73%</td>
</tr>
<tr>
<td>Switching off from everyday life</td>
<td>63%</td>
</tr>
<tr>
<td>Experiencing great food &amp;; drink</td>
<td>62%</td>
</tr>
<tr>
<td>Spending quality time with friends or family</td>
<td>48%</td>
</tr>
<tr>
<td>A place that accommodates me and my needs</td>
<td>46%</td>
</tr>
<tr>
<td>Getting around the destination easily</td>
<td>41%</td>
</tr>
<tr>
<td>Feeling safe</td>
<td>41%</td>
</tr>
<tr>
<td>Discovering a culture that is different to mine</td>
<td>37%</td>
</tr>
<tr>
<td>The familiarity of the destination</td>
<td>28%</td>
</tr>
<tr>
<td>Getting off the beaten track</td>
<td>24%</td>
</tr>
<tr>
<td>Trying/learning something new</td>
<td>16%</td>
</tr>
<tr>
<td>Experiencing some adventure</td>
<td>15%</td>
</tr>
</tbody>
</table>

B20. Motivations Sample size n=401
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

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

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

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

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

- 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%

B30. Barriers; sample size n=167
Interest in a trip to Great Britain is highest amongst our target audience with more accessibility requirements.

Propensity to visit (T3B)

<table>
<thead>
<tr>
<th>Country</th>
<th>MAR*</th>
<th>FAR</th>
<th>SAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Germany</td>
<td>58%</td>
<td>37%</td>
<td>31%</td>
</tr>
<tr>
<td>Spain</td>
<td>42%</td>
<td>30%</td>
<td>29%</td>
</tr>
<tr>
<td>Italy</td>
<td>43%</td>
<td>35%</td>
<td>23%</td>
</tr>
<tr>
<td>The Netherlands</td>
<td>43%</td>
<td>28%</td>
<td>20%</td>
</tr>
<tr>
<td>France</td>
<td>32%</td>
<td>16%</td>
<td>14%</td>
</tr>
<tr>
<td>Great Britain</td>
<td>27%</td>
<td>16%</td>
<td>8%</td>
</tr>
<tr>
<td>Ireland</td>
<td>23%</td>
<td>15%</td>
<td>8%</td>
</tr>
<tr>
<td>USA</td>
<td>21%</td>
<td>8%</td>
<td>9%</td>
</tr>
</tbody>
</table>

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)

Inspiration phase (resources used)

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

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

<table>
<thead>
<tr>
<th>Inspiration Phase - Consideration</th>
<th>MAR*</th>
<th>FAR</th>
<th>SAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>The cost</td>
<td>52%</td>
<td>52%</td>
<td>54%</td>
</tr>
<tr>
<td>The weather</td>
<td>39%</td>
<td>44%</td>
<td>49%</td>
</tr>
<tr>
<td>Wheelchair accessibility of the destination</td>
<td>49%</td>
<td>8%</td>
<td>18%</td>
</tr>
<tr>
<td>The ease of getting around the destination</td>
<td>57%</td>
<td>38%</td>
<td>41%</td>
</tr>
<tr>
<td>The location / frequency of toilets / places to rest</td>
<td>54%</td>
<td>11%</td>
<td>40%</td>
</tr>
<tr>
<td>The cuisine</td>
<td>39%</td>
<td>32%</td>
<td>35%</td>
</tr>
<tr>
<td>The ability to speak the language</td>
<td>25%</td>
<td>16%</td>
<td>21%</td>
</tr>
<tr>
<td>The transport links to the destination</td>
<td>53%</td>
<td>37%</td>
<td>43%</td>
</tr>
<tr>
<td>The healthcare system / cost of healthcare</td>
<td>46%</td>
<td>19%</td>
<td>31%</td>
</tr>
<tr>
<td>Pre-book priority access / queue jumping access</td>
<td>30%</td>
<td>11%</td>
<td>26%</td>
</tr>
<tr>
<td>Step free access</td>
<td>69%</td>
<td>16%</td>
<td>34%</td>
</tr>
<tr>
<td>Accommodation that has specific facilities for accessibility needs</td>
<td>14%</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Other</td>
<td>1%</td>
<td>0%</td>
<td>1%</td>
</tr>
<tr>
<td>None of the above</td>
<td>1%</td>
<td>11%</td>
<td>5%</td>
</tr>
</tbody>
</table>
Once they have spent time planning, personas 1 and 3 are more impulsive when booking their trip.
**Our targets considerations do not change when they aim to book**

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

C70. Booking Phase (Considerations); * MAR (More accessibility requirements) sample size n=171 / FAR (Fewer accessibility requirements) sample size n=63 / SAR (some accessibility requirements) sample size n=167
Staff and local establishments need to be informed on the destination, and well stocked with leaflets

### On the Ground (resources used)

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

### Sharing & Advocates

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

B10. Countries visited in the past; B60. Future travel intention; Sample size n=401
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
- **45%** Visit beaches
- **44%** View ancient/traditional buildings/stories/artefacts
- **44%** Experience a culture different to my own
- **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

B70. Travel interest in the future Sample size n=401
Sign posting the accessibility 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.

<table>
<thead>
<tr>
<th>Category</th>
<th>It was a barrier / consideration that was taken into account</th>
<th>It was something that came to mind but did not impact the planning / booking process</th>
<th>It was not relevant / not something considered</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accessibility of the accommodation</td>
<td>44%</td>
<td>33%</td>
<td>23%</td>
</tr>
<tr>
<td>Accessibility of things to see and do</td>
<td>39%</td>
<td>38%</td>
<td>22%</td>
</tr>
<tr>
<td>The ease of getting around the destination</td>
<td>39%</td>
<td>41%</td>
<td>20%</td>
</tr>
<tr>
<td>Accessibility of transport to and around the destination</td>
<td>37%</td>
<td>40%</td>
<td>23%</td>
</tr>
<tr>
<td>Wheelchair accessibility of the destination</td>
<td>35%</td>
<td>27%</td>
<td>38%</td>
</tr>
<tr>
<td>Availability of accessibility information</td>
<td>35%</td>
<td>42%</td>
<td>22%</td>
</tr>
<tr>
<td>The transport links to the destination</td>
<td>34%</td>
<td>42%</td>
<td>24%</td>
</tr>
<tr>
<td>Knowing where to receive / get healthcare</td>
<td>34%</td>
<td>44%</td>
<td>22%</td>
</tr>
<tr>
<td>The location / frequency of toilets / places to rest</td>
<td>29%</td>
<td>43%</td>
<td>27%</td>
</tr>
<tr>
<td>The healthcare system / cost of healthcare/ health insurance</td>
<td>29%</td>
<td>41%</td>
<td>30%</td>
</tr>
<tr>
<td>The ability to speak the language</td>
<td>17%</td>
<td>37%</td>
<td>47%</td>
</tr>
</tbody>
</table>

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
- 48% Whether mask regulations are in place
- 57% COVID rates at the time of planning
- 53% COVID rates at the time of booking
- 58% Cleanliness of the destination
- 54% If a vaccination is required for travel
- 40% The % of the population vaccinated
- 35% Population density of the destination
- 57% If a COVID test is required to enter the destination
- 54% If a COVID test is required to enter the destination
- 60% Flexible cancelation policies
- 16% Other

B50. Impact of COVID-19 Sample size n=401
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
  - None of these (7%)
  - Explore the vast Dalby Forest by bike on a range of trails (37%)
  - Visit historic Whitby - Whitby is a historic seaside town where Bram Stoker’s Dracula takes place (50%)
  - Take a walk from Sutton Bank National Park Centre to the White Horse of Kilburn and ‘England’s Finest View’ (37%)
  - Explore the market town of Helmsley with its five-acre Helmsley Walled Garden and Helmsley Castle (49%)
  - Visit Castle Howard, one of Britain’s finest historic houses (47%)
  - Visit a quaint seaside village and find fossils on the shoreline with a local expert (44%)
  - Take the North Yorkshire Moors Railway - A trip across the Moors by train, seeing all the sites from the comfort of your seat (49%)

C80. Interest in NYM activities; * MAR (More accessibility requirements sample size n=171 / FAR (Fewer accessibility requirements) sample size n=63 / SAR (some accessibility requirements) sample size n=167

Visit a quaint seaside village and find fossils on the shoreline with a local expert

Visit Castle Howard, one of Britain’s finest historic houses

Take a walk from Sutton Bank National Park Centre to the White Horse of Kilburn and ‘England’s Finest View’

Explore the market town of Helmsley with its five-acre Helmsley Walled Garden and Helmsley Castle

- Take the North Yorkshire Moors Railway - A trip across the Moors by train, seeing all the sites from the comfort of your seat
  - None of these (7%)
  - Explore the vast Dalby Forest by bike on a range of trails (37%)
  - Visit historic Whitby - Whitby is a historic seaside town where Bram Stoker’s Dracula takes place (50%)
  - Take a walk from Sutton Bank National Park Centre to the White Horse of Kilburn and ‘England’s Finest View’ (37%)
  - Explore the market town of Helmsley with its five-acre Helmsley Walled Garden and Helmsley Castle (49%)
  - Visit Castle Howard, one of Britain’s finest historic houses (47%)
  - Visit a quaint seaside village and find fossils on the shoreline with a local expert (44%)
  - Take the North Yorkshire Moors Railway - A trip across the Moors by train, seeing all the sites from the comfort of your seat (49%)

C80. Interest in NYM activities; * MAR (More accessibility requirements sample size n=171 / FAR (Fewer accessibility requirements) sample size n=63 / SAR (some accessibility requirements) sample size n=167

Visit a quaint seaside village and find fossils on the shoreline with a local expert

Visit Castle Howard, one of Britain’s finest historic houses

Take a walk from Sutton Bank National Park Centre to the White Horse of Kilburn and ‘England’s Finest View’

Explore the market town of Helmsley with its five-acre Helmsley Walled Garden and Helmsley Castle

- Take the North Yorkshire Moors Railway - A trip across the Moors by train, seeing all the sites from the comfort of your seat
  - None of these (7%)
  - Explore the vast Dalby Forest by bike on a range of trails (37%)
  - Visit historic Whitby - Whitby is a historic seaside town where Bram Stoker’s Dracula takes place (50%)
  - Take a walk from Sutton Bank National Park Centre to the White Horse of Kilburn and ‘England’s Finest View’ (37%)
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  - Visit Castle Howard, one of Britain’s finest historic houses (47%)
  - Visit a quaint seaside village and find fossils on the shoreline with a local expert (44%)
  - Take the North Yorkshire Moors Railway - A trip across the Moors by train, seeing all the sites from the comfort of your seat (49%)

C80. Interest in NYM activities; * MAR (More accessibility requirements sample size n=171 / FAR (Fewer accessibility requirements) sample size n=63 / SAR (some accessibility requirements) sample size n=167
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**

- **SAR** (More accessibility requirements) sample size n=171
- **FAR** (Fewer accessibility requirements) sample size n=63
- **MAR** (some accessibility requirements) sample size n=167

<table>
<thead>
<tr>
<th>Description</th>
<th>Sample</th>
<th>SAR</th>
<th>FAR</th>
<th>MAR</th>
<th>Total Sample</th>
</tr>
</thead>
<tbody>
<tr>
<td>I would want to do all of these things and would expect them to be available as a trip/package</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>29%</td>
</tr>
<tr>
<td>I would want to do all of these things but would want to book them myself</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>30%</td>
</tr>
<tr>
<td>I would want to do some of these things but would expect them to be available as a trip/package</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>27%</td>
</tr>
<tr>
<td>I would want to do some of these things but would want to book them myself</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>27%</td>
</tr>
<tr>
<td>I would only want to do one of these things on a trip</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>17%</td>
</tr>
<tr>
<td>Not sure</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>2%</td>
<td>17%</td>
</tr>
</tbody>
</table>

NET: Book as a package – 51%

NET: Book themselves – 45%

C90. Itinerary interest; * MAR (More accessibility requirements) sample size n=171 / FAR (Fewer accessibility requirements) sample size n=63 / SAR (some accessibility requirements) sample size n=167
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 activities and move around independently: 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.

C70. NYM suitability for accessibility Sample size n=401
Not only do our target worry about their requirements, COVID-19 is still hampering their desire to visit the North York Moors

<table>
<thead>
<tr>
<th>COVID-19 fears</th>
<th>Getting around the destination</th>
<th>Accessibility requirements</th>
</tr>
</thead>
<tbody>
<tr>
<td>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.</td>
<td>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 signpost how our target can access different parts of the area, and what a trip for those with accessibility requirements would look like.</td>
<td>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.</td>
</tr>
</tbody>
</table>

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

C100. Barriers to the NYM Sample size n=401
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?**

- "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
- France
- Spain
- Croatia
- USA
- Turkey
- Switzerland
- Greece
- China
- Scotland
- England
- Scandinavia
- Ireland

D40. How the destination fit those needs Sample size n=401