



VIVID-Isle of Man

UK MARKET ANALYSIS - PHASE 4 RESULTS

14.09.2021



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Purpose of this document

This document provides a **comparative overview of the second and fourth phase of research findings**. Based on the research findings of phase 2 conducted in 2020, we developed hypotheses and research objectives for phase 3 and 4 conducted in 2021.

This document is therefore a final debrief of the research process, providing **insights and recommendations** from the final fourth phase of research.

Keith Crane
Research Director
September 2021

General research objectives

- Identify the requirements to consider travelling
- Measure levels of destination awareness
- Capture customer journey
- Barriers to a holiday to the Isle of Man
- Identify activity availability and product development opportunities
- Compare the results of the phase 4 study with the previous results of phase 2, which was conducted in 2020.

Research questions addressed in this analysis

- Overall awareness of the Isle of Man - have heard of vs have visited.
- Top competitors.
- Top short break types for 2021/2022
- Average review and planning time and average booking travel time.
- Top sources of media for gathering information.
- Top holiday experiences people want and holiday experience types vs who they travel with.
- Anything significant in terms of accommodation types short break vs 7-night vs longer holiday - what is wanted depending on who they travel with.
- What is important when choosing a destination and desire to travel to the Isle of Man.
- Top barriers to an IOM holiday.

Methodology

Sample

1,007 nationally representative respondents 18+ recruited via third party panel provider client database. We have screened respondents in based on willingness to:

- go on holiday only within the British Isles in 2021/2022
- go on holiday both inside and outside the British Isles in 2021/2022

Fieldwork dates

30th July - 3rd September 2021

Data Capture

The research was designed using a 39-question survey to be completed in about 20 minutes.



KEY PERFORMANCE INDICATORS (KPIs)

Key insights

CONSIDERATION OF THE ISLE OF MAN IS LOW, AND HAS FALLEN

Consideration of all holiday/short break destinations in the British Isles has dropped compared to phase 2, possibly due to reopening of travel abroad. However islands have been hit worst; consideration of the Channel Islands fell from 45% to 28%, and the Isle of Man dipped from 42% to 29%- the lowest level of consideration among all the areas tracked. This could be linked to uncertainty about how border and quarantine rules may differ. The Isle of Man remains low at 2% in unprompted awareness of British Isle holiday destinations, while Scotland and Devon saw big gains over phase 2.

KEY BARRIERS ARE COSTS AND BORDER/QUARANTINE CONCERNS

The top barriers to visiting are concerns about the perceived costs of travel (41%) and accommodation (34%). However travel fears related to COVID-19 are also an issue for 23%, while 28% are concerned about borders being open. 18% of respondents wrongly think they would need to quarantine before and after visiting the Isle of Man while a further 35% are not sure if they would need to- these combined figures were the second highest after Ireland and the Channel Islands- both of which actually do have testing and quarantine regulations in place.

CONSIDERATION AMONG MILLENNIALS HAS DROPPED SIGNIFICANTLY

Millennials previously showed higher levels of consideration of the Isle of Man for holidays in phase 2, making them a key target group. However consideration among them has slipped sharply; for example the 26-30 age group dropped from 57% to 41%, and 31-35 group fell from 60% to 38%. This could be due to travel restrictions on foreign travel lifting; this cohort are possibly especially likely to take advantage of that as many have young families and are at lower risk of serious effects of contracting COVID-19.

Recommendations

MARKETING SHOULD HIGHLIGHT QUARANTINE/TESTING - FREE STATUS...

A key strategy for marketing and advertising should be to highlight that visitors to the Isle of Man that borders are open and they will not need to quarantine before or after their visit or test on arrival. It could also highlight the low prevalence of COVID-19 on the island, to help overcome the 1 in 4 who have general safety concerns about COVID-19.

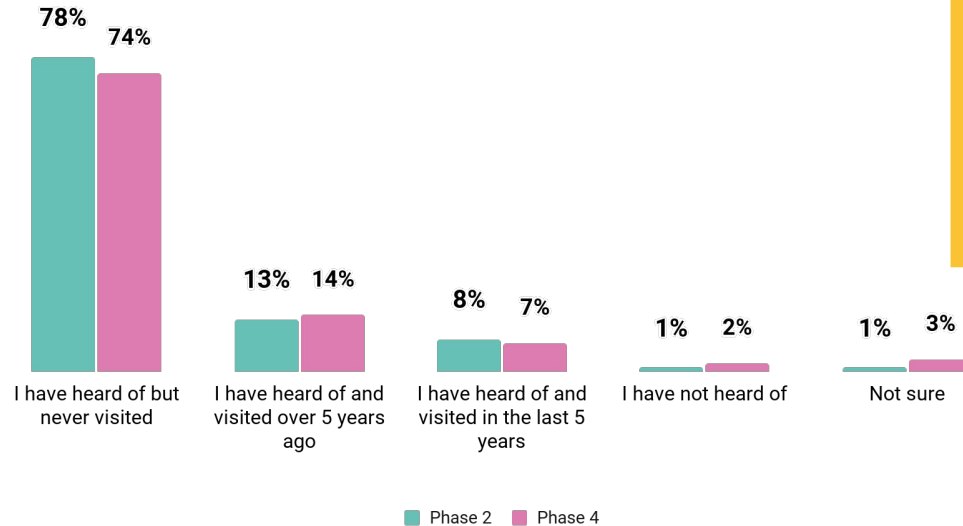
...AND HELP TO OVERCOME CONCERNS ABOUT TRAVEL/ACCOMMODATION COSTS

Marketing strategy could also focus on flagging up low cost ways to reach the Isle of Man, and showcase value for money accommodation options.

Decrease in those who have heard of Isle of Man but never visited

Which of the following short break and holiday destinations in the British Isles, if any, are you aware of? - Isle of Man

UK adults 18+ who plan to go on holiday in the British isles in 2021/2022



The proportion of those who have heard of the Isle of Man but never visited it shrank between phase 2 and phase 4, from 78% to 74%-meanwhile there was growth in those who weren't sure and who had never heard of it (albeit a tiny minority for both).

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Phase 2: Q6 - Which of the following short break and holiday destinations in the British Isles, if any, are you aware of?

Base: full sample (N=1,021). Phase 4: full sample (N=1,007). Data collected: 30th July - 3rd September 2021. Q8.

Unprompted awareness of IOM as a holiday destination remains very low

Unaided awareness of British Isle holiday/ short break destinations

2nd Phase

CORNWALL	SCOTLAND	LAKE DISTRICT	WALES	DEVON	LONDON	BLACKPOOL	ISLE OF MAN
33%	22%	20%	19%	18%	11%	6%	2%

4th Phase

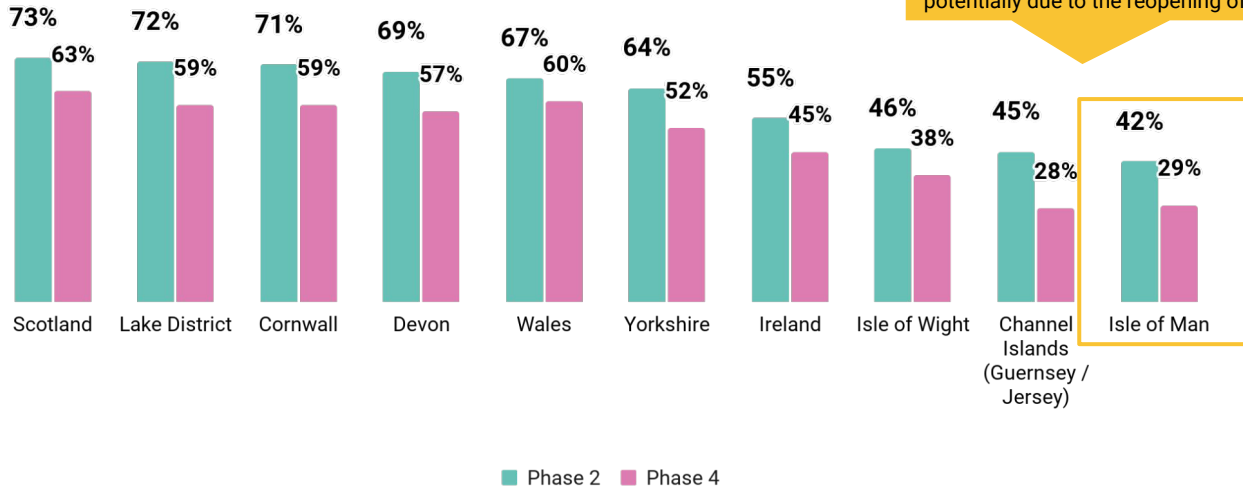
SCOTLAND	DEVON	CORNWALL	WALES	LAKE DISTRICT	LONDON	BLACKPOOL	ISLE OF MAN
43% (+21)	35% (+17)	31% (-2)	22% (+3)	17% (-3)	10% (-1)	7% (+1)	2% (=0)

Both Scotland and Devon roughly doubled their mention rates in unaided awareness between phase 2 and phase 4. The Isle of Man remained at 2% in both phases.

The Isle of Man is the least considered British Isles destination

Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future?

UK adults 18+ who plan to go on holiday in the British isles in 2021 - Top 2 boxes



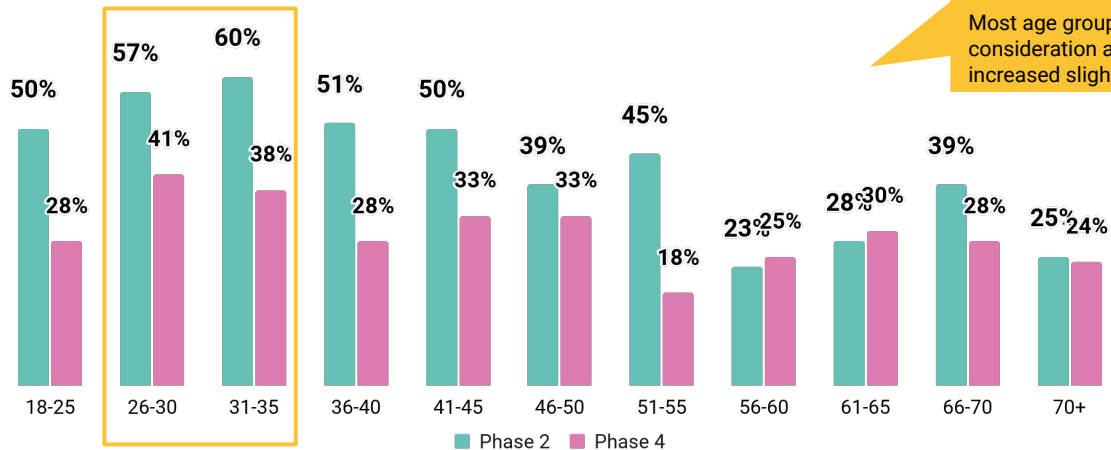
The Isle of Man remains the destination with the lowest consideration, at 29%; consideration has dropped by 13 percentage points. This trend was mirrored in the other island destinations and could be linked to uncertainty over COVID-19 travel rules. Consideration for all destinations fell from phase 2 to phase 4, potentially due to the reopening of travel abroad.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q7 - Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? Top 2 Box: 'Very likely' and 'Somewhat likely'. Base: full sample (N=1,021). Phase 4: full sample (N=1,007). Data collected: 30th July - 3rd September 2021. Q10.

Consideration of the Isle of Man among millennials has dropped

Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? - Isle of Man

UK adults 18+ who plan to go on holiday in the British isles in 2021 - Top 2 boxes



Consideration of the Isle of Man for holidays is still highest among millennials, however consideration among this group fell sharply in phase 4 compared with phase 2.

Most age groups saw a dip in consideration, however consideration among the 56-65 age group has increased slightly.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q7 - Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? 'Very/Somewhat likely'

Base: those aware of the Isle of Man. 18-25 years old (N=130), 26-30 years old (N=87), 31-35 years old (N=83), 36-40 years old (N=79), 41-45 years old (N=87), 46-50 years old (N=93), 51-55 years old (N=88) 56-60 years old (N=76), 61-65 years old (N=69), 66-70 years old (N=69), more than 70 (N=145).

Phase 4: full sample (N=1,007). Data collected: 30th July - 3rd September 2021. Q10.



In phase 2 millennials were more keen to consider IoM as a future destination..

2nd Phase

Demographic

	18-25	26-30	31-35	36-40	41-45	46-50	51-55	56-60	61-66	66-70	70+
ISLE OF MAN	50%	57%	60%	51%	50%	39%	45%	23%	28%	39%	25%
LAKE DISTRICT	74%	81%	84%	74%	77%	68%	80%	68%	65%	68%	62%
SCOTLAND	79%	83%	79%	71%	68%	74%	80%	68%	68%	70%	60%
IRELAND	72%	69%	67%	59%	58%	52%	63%	51%	40%	47%	32%
CORNWALL	70%	75%	79%	67%	80%	79%	78%	68%	71%	62%	59%
DEVON	63%	70%	78%	70%	77%	76%	76%	70%	71%	65%	56%
WALES	70%	69%	80%	75%	68%	62%	73%	62%	62%	64%	55%
YORKSHIRE	61%	63%	71%	63%	66%	58%	71%	70%	61%	69%	56%
ISLE OF WIGHT	59%	56%	65%	43%	52%	48%	46%	36%	36%	39%	31%
CHANNEL ISLANDS	49%	50%	56%	44%	51%	43%	45%	43%	40%	43%	36%

Destination

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q7 - Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? Base: full sample. 18-25 years old (N=135), 26-30 years old (N=88), 31-35 years old (N=87), 36-40 years old (N=87), 41-45 years old (N=87), 46-50 years old (N=93), 51-55 years old (N=89), 56-60 years old (N=76), 61-65 years old (N=69), 66-70 years old (N=70), more than 70 (N=147).



Rare:consulting

..By phase 4 they are still likeliest to visit, although their consideration rates have dropped

4th Phase

Demographic

	18-25	26-30	31-35	36-40	41-45	46-50	51-55	56-60	61-66	66-70	70+
ISLE OF MAN	28%	41%	38%	28%	33%	33%	18%	25%	30%	28%	24%
LAKE DISTRICT	63%	57%	59%	68%	60%	56%	62%	59%	69%	60%	48%
SCOTLAND	61%	67%	59%	64%	59%	70%	56%	62%	66%	74%	63%
IRELAND	44%	59%	54%	52%	38%	56%	41%	37%	38%	42%	38%
CORNWALL	62%	64%	54%	59%	62%	63%	53%	65%	63%	57%	54%
DEVON	41%	66%	51%	60%	55%	56%	51%	69%	64%	58%	60%
WALES	60%	65%	57%	74%	54%	54%	53%	57%	64%	63%	60%
YORKSHIRE	45%	54%	43%	51%	53%	50%	46%	50%	61%	56%	62%
ISLE OF WIGHT	42%	47%	42%	35%	39%	43%	33%	29%	33%	38%	33%
CHANNEL ISLANDS	30%	29%	27%	28%	26%	31%	23%	23%	30%	38%	29%

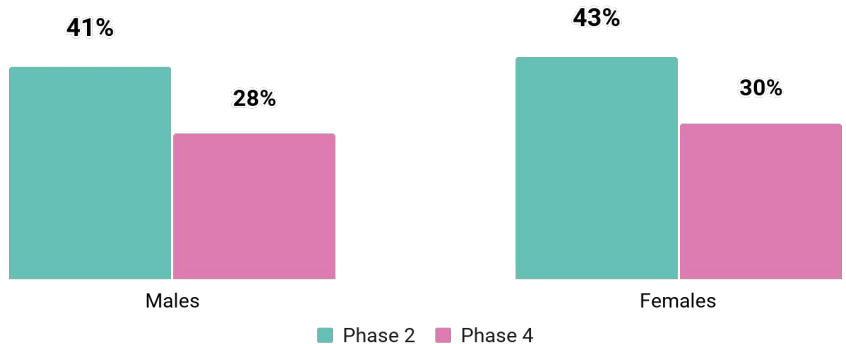
Destination

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 2 data collected: 30th July - 3rd September 2021 (N=1007). Q10 - Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? Base: 18-25 years old (N=133), 26-30 years old (N=87), 31-35 years old (N=86), 36-40 years old (N=79), 41-45 years old (N=86), 46-50 years old (N=92), 51-55 years old (N=87), 56-60 years old (N=75), 61-65 years old (N=68), 66-70 years old (N=69), more than 70 (N=145).

Consideration of Isle of Man has declined among both men and women

Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? - Isle of Man

UK adults 18+ who plan to go on holiday in the British isles in 2021/2022



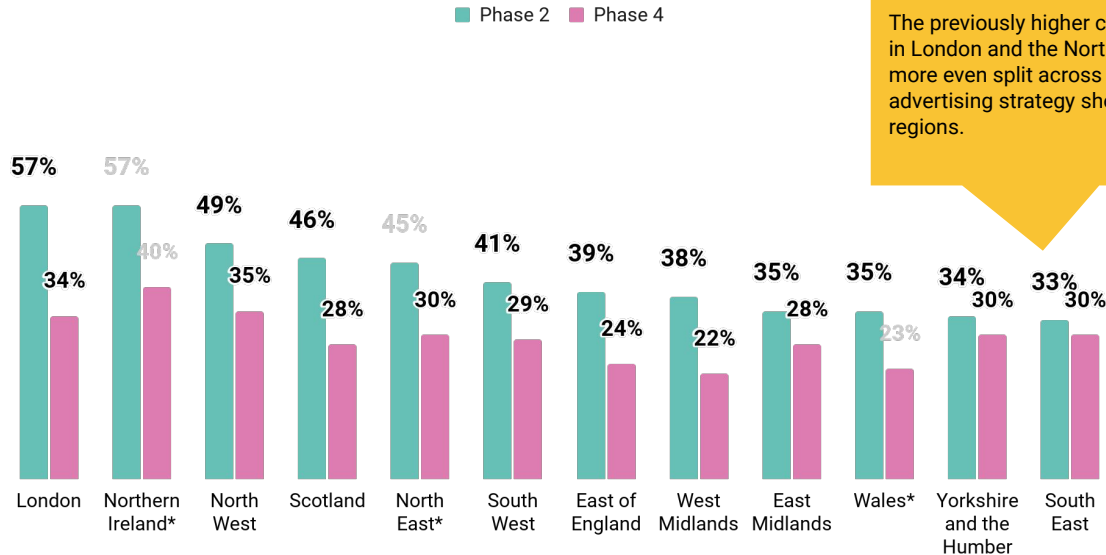
Between phase 2 and phase 4 of the research, consideration of the Isle of Man as a short break destination has dropped considerably, by 13 percentage points for both respectively.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q7 - Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? 'Very/Somewhat likely'
Base: those aware of the Isle of Man. Males (N=489), females (N=519). Phase 4: full sample (N=1,007). Data collected: 30th July - 3rd September 2021. Q10

Previously higher consideration in London and North West fell

Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? - Isle of Man

UK adults 18+ who plan to go on holiday in the British isles in 2021



The previously higher consideration of the Isle of Man in London and the North West has dipped to create a more even split across regions. This means that advertising strategy should be broadly focused across regions.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q7 - Which of the following short break and holiday destinations on the British Isles, would you consider visiting in the future? 'Very/Somewhat likely'

Base: those aware of the Isle of Man. South East (N=139), London (N=131), North West (N=110), North East (N=40)*, East of England (N=94), West Midlands (N=88), South West (N=86), Yorkshire and The Humber (N=83), East Midlands (N=74), Scotland (N=86), Northern Ireland (N=28)*,

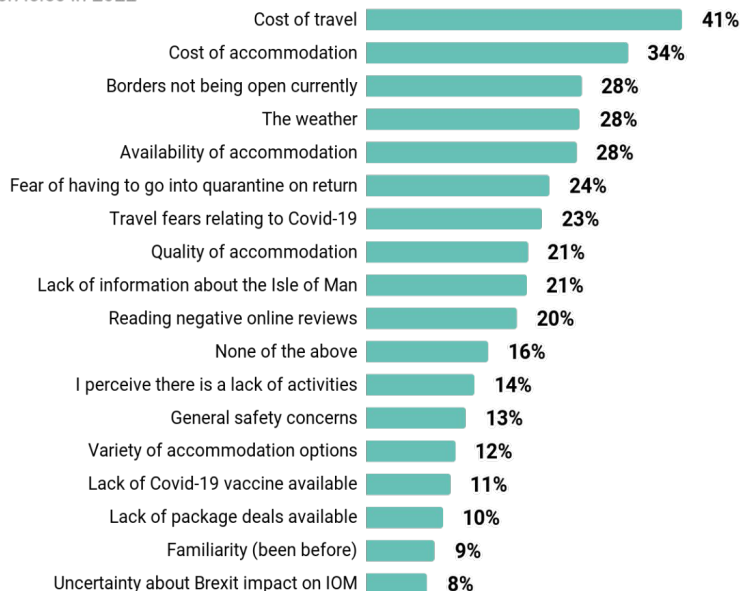
Wales (N=48). * Caution: small base size. Use it for illustrative purposes only. Phase 4: full sample (N=1,007). Data collected: 30th July - 3rd September

2021. Q10.

Concerns over travel costs and borders being open are main barriers to visiting IOM

When thinking about 2022 holidays and short breaks what would prevent you from booking a trip to the Isle of Man?

UK adults 18+ who plan to go on holiday in the British isles in 2022



Worries about travel and accommodation costs are the key barrier to travel, however 28% cited concerns about borders being open, while 1 in 4 worry about having to quarantine on return.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 4 data collected: 30th July - 3rd September 2021.

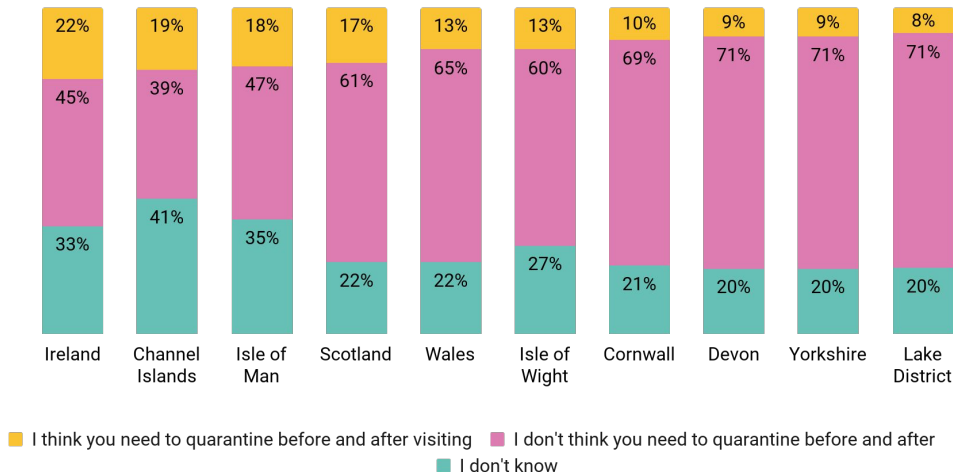
Q36- When thinking about 2021 holidays and short breaks what would prevent you from booking a trip to the Isle of Man?

Base: full sample (N=1,007).

1 in 5 wrongly think they would need to quarantine when visiting the Isle of Man

Which of the following British Isle destinations, if any, do you think you need to quarantine before and after visiting?

UK adults 18+ who plan to go on holiday in the British isles in 2022



18% think they would need to quarantine before and after visiting the Isle of Man, while a further 35% aren't sure.

The combined proportion was the third highest after Ireland and the Channel Islands, both of which actually do have testing and quarantine requirements.

Safety and lack of information became a barrier

2nd Phase

Demographic

	18-30	Index	31-45	Index	46-65	Index	66+	Index
Cost of travel	31%	76	50%	122	45%	109	35%	85
Cost of accommodation	26%	75	40%	116	37%	108	33%	95
Borders not being open currently	27%	94	32%	112	28%	101	25%	89
Availability of accommodation	24%	86	34%	124	27%	98	24%	87
Lack of indoor activities	28%	100	31%	111	26%	93	27%	96
Lack of 'package deals' via a travel agent/online agent	18%	77	25%	106	23%	96	30%	125
General safety concerns	20%	88	27%	119	22%	96	22%	97
Quality of accommodation	25%	117	25%	118	17%	81	19%	88
Uncertainty around the impact of Brexit on the Isle of Man	21%	102	26%	123	20%	94	16%	78
Reading negative online reviews	24%	123	21%	107	18%	90	16%	81
Lack of outdoor activities	15%	105	16%	116	15%	109	8%	59
I am defined as a vulnerable person and it is not safe for me to travel to the Isle of Man	12%	96	18%	143	9%	73	12%	93
Variety of accommodation options	16%	134	14%	118	9%	79	8%	71
Travel fears relating to Covid-19 when travelling to Isle of Man	19%	158	15%	124	8%	68	6%	52
Fear of having to go into quarantine on return from the Isle of Man	17%	152	13%	121	7%	62	8%	74
I don't know enough about the Isle of Man	17%	163	10%	93	7%	62	10%	98
Familiarity	14%	160	10%	117	5%	57	7%	78
Lack of offering for families	16%	198	7%	86	5%	57	6%	75
Worries about getting to activities and attractions when on Island (have to hire or take a car)	18%	218	9%	105	5%	61	2%	22

Safety and lack of information became a barrier

Demographic

	18-30	Index	31-45	Index	46-65	Index	66+	Index
Cost of travel	32%	76	50%	117	45%	105	36%	84
Borders not being open	27%	94	31%	111	28%	99	26%	90
Reading negative online reviews	24%	125	21%	111	17%	88	16%	84
Cost of accommodation	25%	71	40%	111	38%	107	33%	93
Availability of accommodation	24%	86	34%	121	27%	98	24%	85
I perceive there is a lack of activities	16%	111	17%	116	14%	100	9%	62
Quality of accommodation	25%	118	25%	121	17%	81	20%	93
Variety of accommodation options	16%	141	14%	126	9%	80	7%	66
Familiarity (e.g. been before)	14%	167	11%	133	5%	61	6%	74
The weather	27%	98	31%	112	26%	93	28%	99
Lack of Covid-19 vaccine being made available	17%	164	14%	131	6%	59	9%	84
Lack of indoor activities (e.g. museums, shopping centres, indoor sports centres etc)	18%	167	15%	134	8%	68	6%	55
Fear of having to go into quarantine on return	18%	79	25%	108	22%	95	28%	121
Travel fears relating to Covid-19	20%	87	27%	119	22%	95	21%	92
Lack of 'package deals' via a travel agent/online agent	16%	178	10%	105	6%	67	9%	95
General safety concerns	13%	104	19%	148	9%	69	11%	92
Lack of information about the Isle of Man	22%	106	25%	123	19%	90	16%	79
I am defined as a vulnerable person and it is not safe for me to travel.	15%	223	7%	101	4%	62	5%	70
Uncertainty around the impact of Brexit	18%	239	8%	114	5%	64	2%	27

Familiarity and concerns about activities as well as fears about Covid-19 related measures are top barriers for youngest, even above cost of travel.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 4 data collected: 30th July - 3rd September 2021.

Q36- When thinking about 2021 holidays and short breaks what would prevent you from booking a trip to the Isle of Man?

Base: 18-30 (N=223), 31-45 (N=254), 46-65 (N=327), 66+ (N=217). **Green / Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

Phase 2: South East, London and West Midlands index higher than other locations

South East		Index
Lack of outdoor activities	32%	139
Lack of 'package deals' via a travel agent/online agent	29%	138
Lack of offering for families	29%	138
Poor past experience	25%	156

In common with London

London		Index
Reading negative online reviews	34%	131
Lack of 'package deals' via a travel agent/online agent	28%	133
Poor past experience	23%	144
Familiarity	20%	133

In common with South East

West Midlands		Index
Availability of accommodation	47%	124
Variety of accommodation options	40%	154
Familiarity	21%	140

Of all the regions analysed South East, London and West Midlands show higher indexes across all the categories. The tables show the three highest indexes per region.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Data Collected 9th - 17th September 2020 (N=1,021).

Q25 - When thinking about 2021 holidays and short breaks would prevent you from booking a trip to the Isle of Man?

Base: full sample (N=1,021). * Index vs. total population. **Green / Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

In Phase 4, highest index scores relate to safety

East Midlands		Index
I am defined as a vulnerable person and it is not safe for me to travel	9%	138
Cost of travel	54%	127
Variety of accommodation options	14%	121

Highest index scores (most important obstacles) are safety-related concerns in East Midlands and East of England.

East of England		Index
I am defined as a vulnerable person and it is not safe for me to travel	13%	187
Quality of accommodation	32%	151
General safety concerns	18%	142

In Scotland, geopolitical factors such as Brexit score higher.

Scotland		Index
Uncertainty around the impact of Brexit	11%	154
Borders not being open	34%	120
Lack of information about the Isle of Man	23%	111

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 4 data collected: 30th July - 3rd September 2021.

Q36- When thinking about 2021 holidays and short breaks what would prevent you from booking a trip to the Isle of Man?

Base: East Midlands (N=66), East of England (N=83), Scotland (N=79). * Index vs. total population. Green / Red numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

In Phase 4, highest index scores relate to safety

East Midlands		Index
Cost of travel	54%	127
Cost of accommodation	42%	120
The weather	29%	102

Costs are top barriers for half the population in these three locations.

East of England		Index
Cost of travel	58%	137
Cost of accommodation	42%	118
Borders not being open	33%	116

South West		Index
Cost of travel	49%	114
Cost of accommodation	37%	103
Availability of accommodation	30%	109

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 4 data collected: 30th July - 3rd September 2021.

Q36- When thinking about 2021 holidays and short breaks what would prevent you from booking a trip to the Isle of Man?

Base: East Midlands (N=66), East of England (N=83), Scotland (N=79). * Index vs. total population. **Green** / **Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

Women over index for perceived barriers to visiting Isle of Man

	Demographic			
	Males	Males index	Females	Females index
Cost of travel	39%	94	44%	105
Cost of accommodation	32%	93	37%	107
Borders not being open	26%	92	30%	108
The weather	27%	97	29%	103
Availability of accommodation	27%	96	29%	104
Fear of having to go into quarantine on return	23%	94	25%	105
Travel fears relating to Covid-19	21%	93	24%	107
Quality of accommodation	20%	96	22%	104
Lack of information about the Isle of Man	17%	82	25%	118
Reading negative online reviews	18%	92	21%	108
I perceive there is a lack of activities	13%	92	15%	108
General safety concerns	9%	70	16%	129
Lack of indoor activities (e.g., museums, shopping centres, indoor sports centres etc)	9%	74	15%	125
Variety of accommodation options	10%	85	13%	114
Lack of Covid-19 vaccine being made available	10%	93	12%	107
Lack of 'package deals' via a travel agent/online agent	11%	106	10%	94
Familiarity (e.g. been before)	9%	97	9%	103
Uncertainty around the impact of Brexit	5%	66	11%	133
I am defined as a vulnerable person and it is not safe for me to travel.	5%	69	10%	130

Women appear more averse to visiting the Isle of Man than men. Cost of travel and accommodation are the top barriers for both, however women are likelier than men to feel they lack information about the IOM, and to feel that there may not be enough activities. Men may possibly be more drawn by the Isle of Man's famous sporting events and activities (TT, golf and cycling.)



THE MARKET

Highlights - The market

INTENTION TO GO ON HOLIDAY HAS DROPPED SHARPLY

In phase 4, intention to go on holiday has fallen compared to phase 2; in 2020 58% planned to holiday domestically and abroad in 2021, and 42% just within the British Isles. By phase 4, these figures had fallen to 40% and 15% respectively for 2022, which could be due to the fact that the traffic light status of foreign countries is subject to change at very short notice by the British government. The lower 2022 rate for the British Isles could be because consumers may be waiting to see if there are fewer barriers to travel abroad in 2022.

COUNTRYSIDE AND RURAL COASTAL ARE PREFERRED

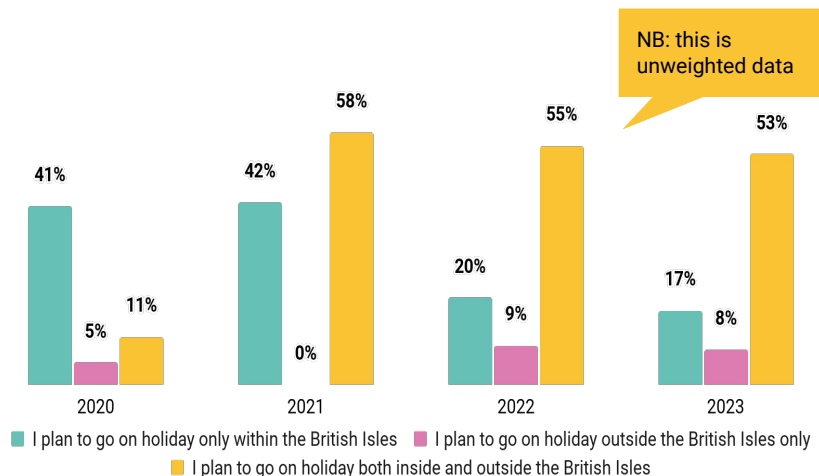
The top scoring types of break were country (53%) and rural coastal breaks (49%), representing a key opportunity for the Isle of Man. Appetite for town, city and large resort hotel holidays was higher than phase 2, likely due to the prevalence of vaccinations this year boosting confidence in being around larger numbers of people.

Intention to travel only inside the British isles will decrease

When thinking about holidays and short breaks you want to take in the future, which of the following statements best applies?

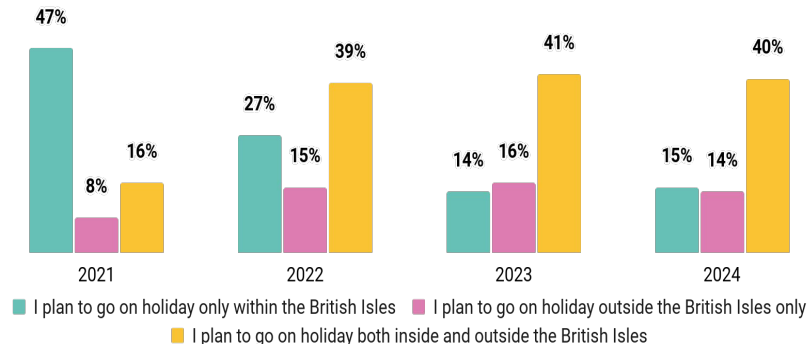
Phase 2

UK adults 18+ who plan to go on holiday in the British isles in 2020-21-22-23



Phase 4

UK adults 18+ who plan to go on holiday in the British isles in 2021-22-23-24



Source: Rare Consulting. UK Adults 18+. Phase 2 Data Collected 9th - 17th September 2020 (N=2,580).

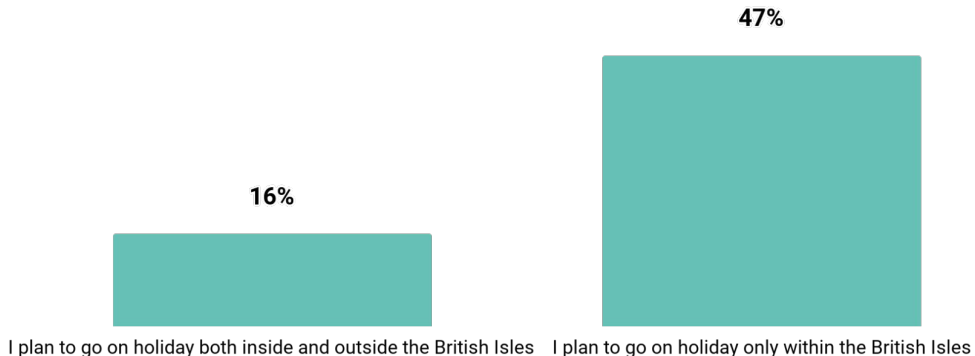
Q4 - When thinking about holidays and short breaks you want to take in the future, which of the following statements best applies?

Base: full sample (N=2,580). Phase 4: full sample (N=1,007). Data collected: 30th July - 3rd September 2021. Q16.

More people choose staycation

When thinking about holidays and short breaks you want to take in the future, which of the following statements best applies? - In 2022

UK adults 18+ who plan to go on holiday in the British isles in 2022



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q4 - When thinking about holidays and short breaks you want to take in the future, which of the following statements best applies?

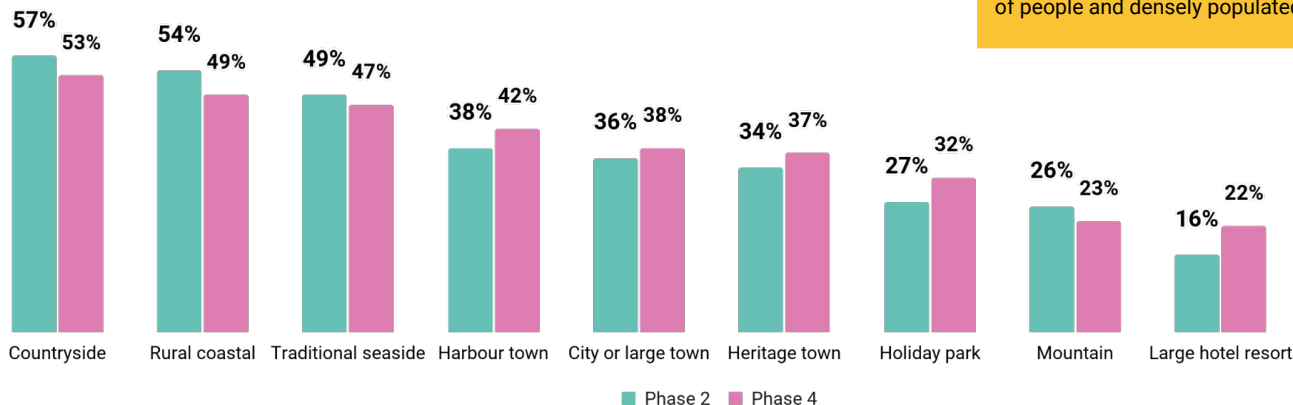
Base: full sample (N=1,021). Phase 4: full sample (N=1,007). Data collected: 30th July - 3rd September 2021. Q16.



Half of people favour rural coastal, an opportunity for the IoM

When thinking about holidays and short breaks you want to take in 2022 in the British Isles, which of the following destinations do you favour?

UK adults 18+ who plan to go on holiday in the British isles in 2022



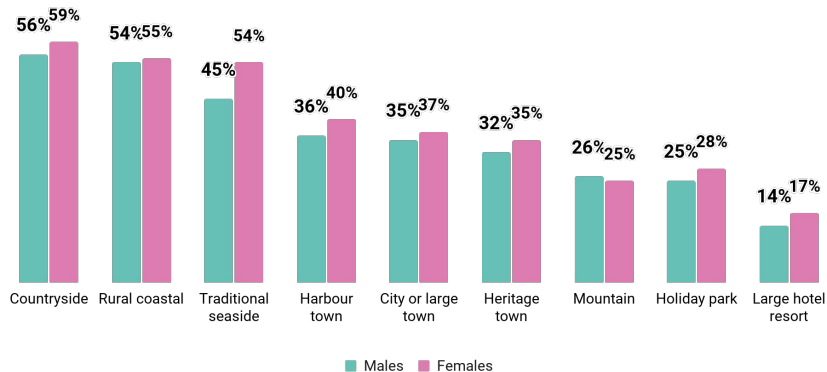
Countryside and rural coastal breaks remain the favourite types, which presents an opportunity for the Isle of Man. There were increases for city, town, holiday park and large hotel resort holidays, possibly as a result of high vaccine uptake making people more comfortable about being round larger numbers of people and densely populated areas.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q9 - When thinking about holidays and short breaks you want to take in 2021 in the British Isles, which of the following destinations do you favour? Base: full sample (N=1,021). Phase 4: full sample (N=1,007). Data collected: 30th July - 3rd September 2021. Q17.

Gender split is balanced across all destinations

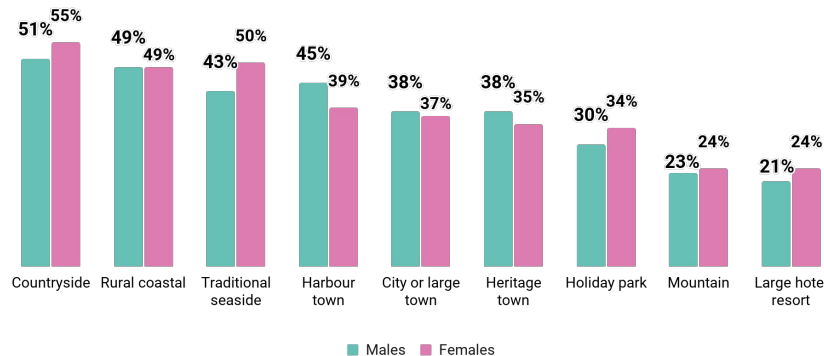
Phase 2: When thinking about holidays and short breaks you want to take in 2021 in the British Isles, which of the following destinations do you favour?

UK adults 18+ who plan to go on holiday in the British isles in 2021



Phase 4: When thinking about holidays and short breaks you want to take in 2022 in the British Isles, which of the following destinations do you favour?

UK adults 18+ who plan to go on holiday in the British isles in 2022



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q9 - When thinking about holidays and short breaks you want to take in 2021 in the British Isles, which of the following destinations do you favour?

Base: full sample. Males (N=498), females (N=523). Phase 4: full sample (N=1,007). Males (N=491), females (N=516).

Data collected: 30th July - 3rd September 2021 (N=1,007). Q17.

Countryside is most favoured across all ages

2nd Phase

Top 3 destinations by age group

Demographic

	18-25	26-30	31-35	36-40	41-45	46-50	51-55	56-60	61-66	66-70	70+
Rural coastal	44%	43%	39%	60%	54%	60%	63%	68%	64%	65%	51%
Countryside	47%	46%	56%	53%	61%	55%	67%	60%	68%	59%	63%
Traditional seaside	47%	46%	48%	58%	52%	52%	57%	53%	45%	44%	44%
Mountain	28%	26%	28%	32%	35%	27%	30%	21%	20%	14%	21%
City or large town	49%	36%	44%	30%	26%	32%	35%	32%	27%	32%	40%
Holiday park	37%	21%	36%	45%	37%	30%	21%	12%	21%	21%	15%
Large hotel resort	27%	25%	21%	18%	16%	12%	15%	8%	7%	7%	10%
Heritage town	26%	28%	34%	28%	27%	35%	37%	37%	45%	41%	38%
Harbour town	25%	23%	33%	28%	32%	48%	38%	49%	51%	48%	51%

Destination

Top choice

2nd choice

3rd choice

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 4 data collected 9th - 17th September 2020 (N=1,021).

Q9 - When thinking about holidays and short breaks you want to take in 2021 in the British Isles, which of the following destinations do you favour?

Base: full sample. 18-25 years old (N=135), 26-30 years old (N=88), 31-35 years old (N=87), 36-40 years old (N=80), 41-45 years old (N=87), 46-50 years old (N=93), 51-55 years old (N=89), 56-60 years old (N=76), 61-65 years old (N=69), 66-70 years old (N=70), more than 70 (N=147).



Rare: consulting

Countryside is the most favoured holiday destination across all age groups

4th Phase

Top 3 destinations by age group

Demographic

	18-25	26-30	31-35	36-40	41-45	46-50	51-55	56-60	61-66	66-70	70+
Rural coastal	23%	37%	37%	55%	45%	48%	53%	61%	68%	63%	64%
Countryside	33%	53%	59%	59%	53%	41%	56%	61%	65%	57%	57%
Traditional seaside	29%	42%	60%	55%	60%	47%	35%	45%	50%	45%	51%
Mountain	23%	42%	32%	33%	25%	20%	17%	20%	24%	11%	15%
City or large town	54%	36%	34%	41%	28%	39%	35%	41%	38%	36%	30%
Holiday park	42%	42%	45%	47%	50%	40%	28%	17%	22%	15%	10%
Large hotel resort	37%	32%	29%	24%	22%	25%	12%	17%	12%	9%	18%
Heritage town	12%	34%	30%	41%	29%	33%	34%	45%	58%	46%	51%
Harbour town	19%	27%	23%	39%	41%	41%	47%	50%	58%	58%	62%

Destination

Top choice

2nd choice

3rd choice

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 4 data collected: 30th July - 3rd September 2021 (N=1,007).

Q17 - When thinking about holidays and short breaks you want to take in 2021 in the British Isles, which of the following destinations do you favour?

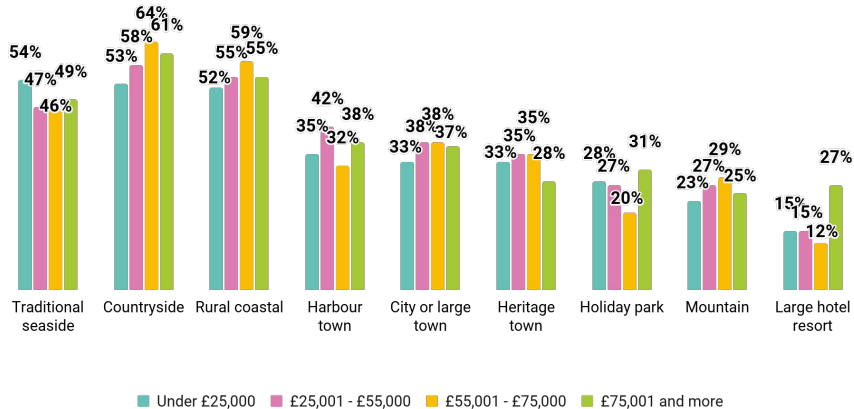
Base: 18-25 years old (N=133), 26-30 years old (N=87), 31-35 years old (N=86), 36-40 years old (N=79), 41-45 years old (N=86), 46-50 years old (N=92), 51-55 years old (N=87), 56-60 years old (N=75), 61-65 years old (N=68), 66-70 years old (N=69), more than 70 (N=145).



People with higher income still choose rural destinations

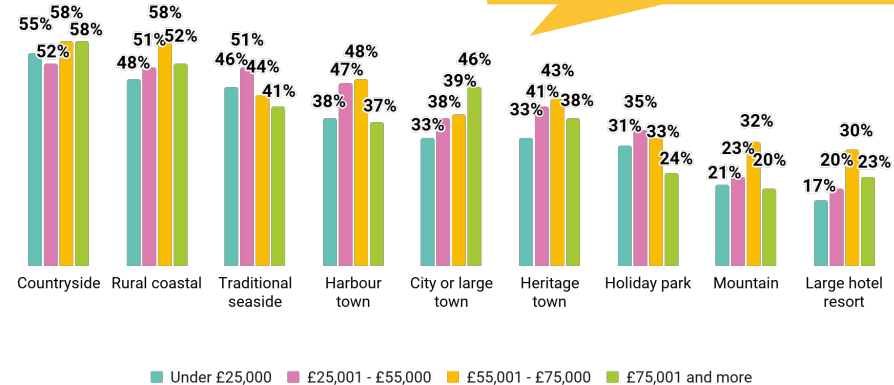
Phase 2: When thinking about holidays and short breaks you want to take in 2021 in the British Isles, which of the following destinations do you favour?

UK adults 18+ who plan to go on holiday in the British Isles in 2021



Phase 4: When thinking about holidays and short breaks you want to take in 2022 in the British Isles, which of the following destinations do you favour?

UK adults 18+ who plan to go on holiday in the British Isles in 2021



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Phase 2: Q9 - When thinking about holidays and short breaks you want to take in 2021 in the British Isles, which of the following destinations do you favour?

Base: Under £25,000 (N=349), £25,001-£55,000 (N=499), £55,001-£75,000 (N=103), £75,001 and more (N=70). Phase 4: Under £25,000 (N=353), £25,001-£55,000 (N=405), £55,001-£75,000 (N=126), £75,001 and more (N=123). Data collected: 30th July - 3rd September 2021 (N=1,007). Q17.



HOLIDAY PLANNING

Highlights - Holiday planning

PEOPLE DECIDE THEIR HOLIDAY 1 TO 3 MONTHS IN ADVANCE

Most people who only plan to go on holiday within the British Isles (31%) and also outside the British Isles (38%) tend to book 1 to 3 months in advance. Across all age ranges, people are least likely to book less than 2 weeks in advance. People aged 36-55 years prefer to book further in advance, ranging from 4-6 months and 6+ months in advance, whereas people aged 18-35 and 55-70+ years are more likely to book 1 to 3 months in advance. Those with higher incomes of £75K+ are more likely to book 4 to 6 months in advance (37%). Whereas incomes below £75K+ are consistent in preferring to book 1 to 3 months in advance.

PEOPLE BOOK TRAVEL 1 TO 3 MONTHS IN ADVANCE

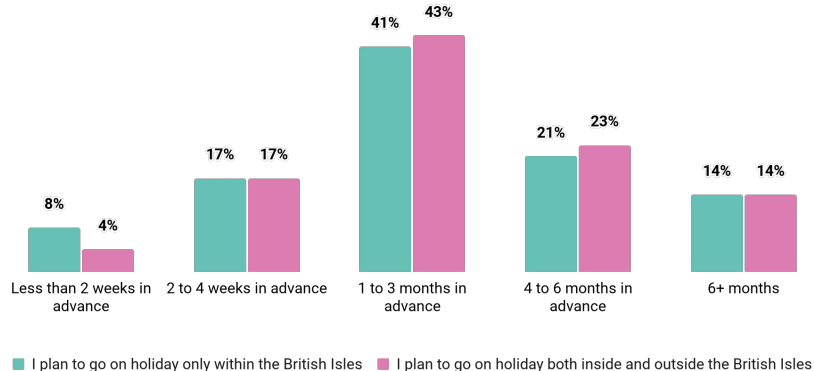
When traveling only within the British Isles (29%) or both within and outside the British Isles (39%), most people prefer to book their travel 1 to 3 months in advance. Very few travellers book less than 2 weeks in advance, which is consistent across all age ranges. Interestingly, people aged 41-45 years (32%) and 51-55 years (28%) are more likely to book travel 6+ months in advance. 22% of people with £25-£55K income brackets are willing to book travel 6+ months in advance, which steadily declines as income increases, with just 14% of people with income brackets of £75K+ looking to book travel that far in advance. Looking at the findings from holiday bookings and travel bookings, the results suggest that people tend to book their travel alongside their holiday booking.

More people are planning their holidays earlier

Quick decisions remain quite stable, but those who plan their travel 6 months in advance or more almost doubled. Those who plan 1 to 3 months before their travel decreased in the same percentual points. This suggests that, this year, more people are taking more time to plan holidays in advance, potentially due to hoping restrictions would be lifted by the time they travel.

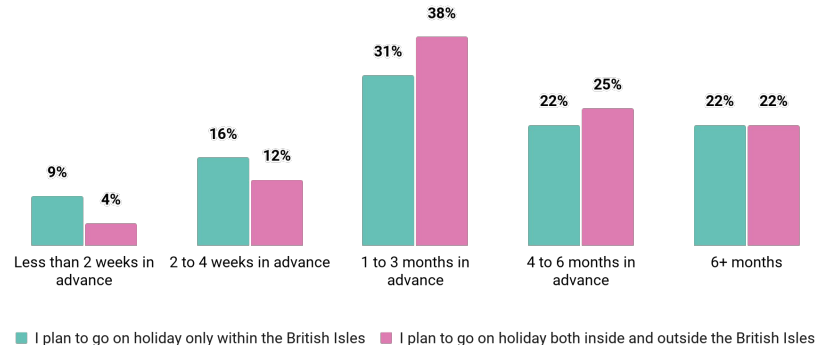
Phase 2: When thinking about holidays and short breaks you want to take in 2021, how far in advance will you review options / plan?

UK adults 18+ who plan to go on holiday in the British isles in 2022



Phase 4: When thinking about holidays and short breaks you want to take in 2022, how far in advance will you review options / plan?

UK adults 18+ who plan to go on holiday in the British isles in 2022



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Phase 2: Q11 - When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... Review Options / Plan?

Base: Those who plan to go on holiday only within the British Isles (N=433), those who plan to go on holiday both inside and outside the British Isles

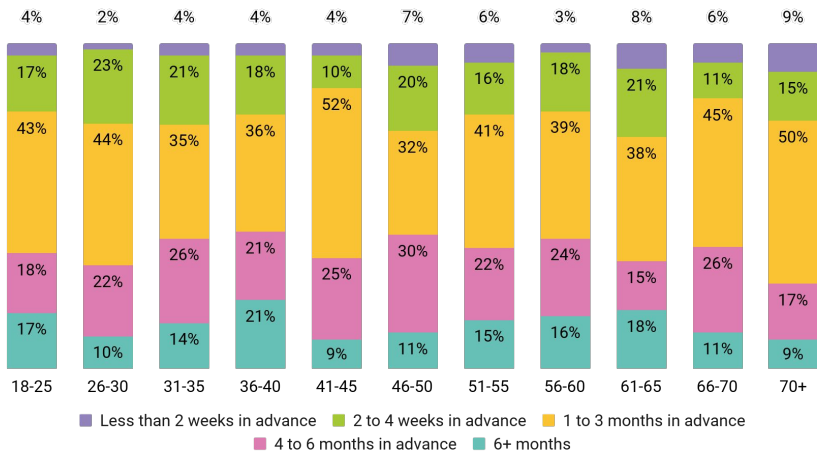
(N=588). Phase 4: those who plan to go on holiday only within the British Isles (N=275), those who plan to go on holiday both inside and outside the British Isles (N=399). Data collected: 30th July - 3rd September 2021 (N=1,007). Q19.

Taking more time to plan is clear for those aged 36-55

Younger and older age groups spend less time planning while middle aged consumers typically spend 4 to 6 months or more planning.

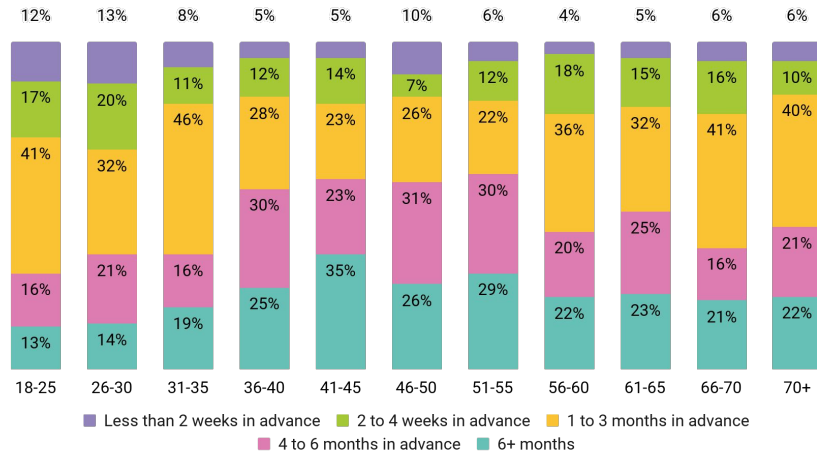
Phase 2: When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... - Review Options / Plan?

UK adults 18+ who plan to go on holiday in the British isles in 2021



Phase 4: When thinking about holidays and short breaks you want to take in 2022, how far in advance will you... - Review Options / Plan?

UK adults 18+ who plan to go on holiday in the British isles in 2022



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020

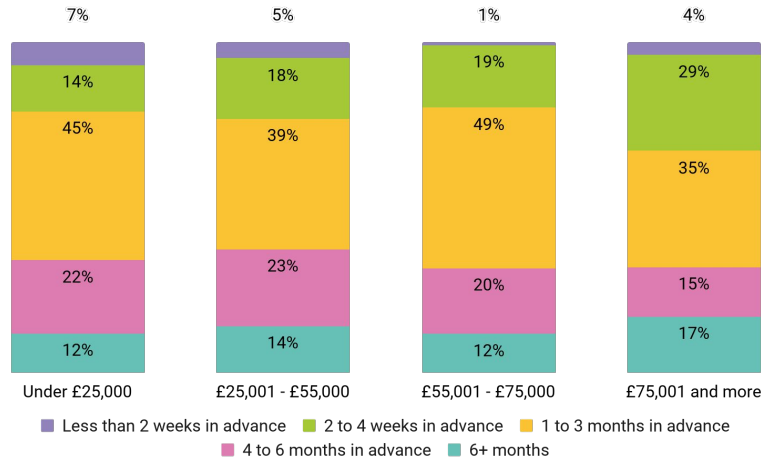
(N=1,021). Q11 - When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... Review Options / Plan?

Base: 18-25 years old (N=135), 26-30 years old (N=88), 31-35 years old (N=87), 36-40 years old (N=80), 41-45 years old (N=87), 46-50 years old (N=93), 51-55 years old (N=89), 56-60 years old (N=76), 61-65 years old (N=69), 66-70 years old (N=70), more than 70 (N=147). Phase 4: 18-25 years old (N=133), 26-30 years old (N=87), 31-35 years old (N=86), 36-40 years old (N=79), 41-45 years old (N=86), 46-50 years old (N=92), 51-55 years old (N=87), 56-60 years old (N=75), 61-65 years old (N=68), 66-70 years old (N=69), more than 70 (N=145). Data collected: 30th July - 3rd September 2021 (N=1,007). Q19.

Longer planning is clearer for higher income consumers

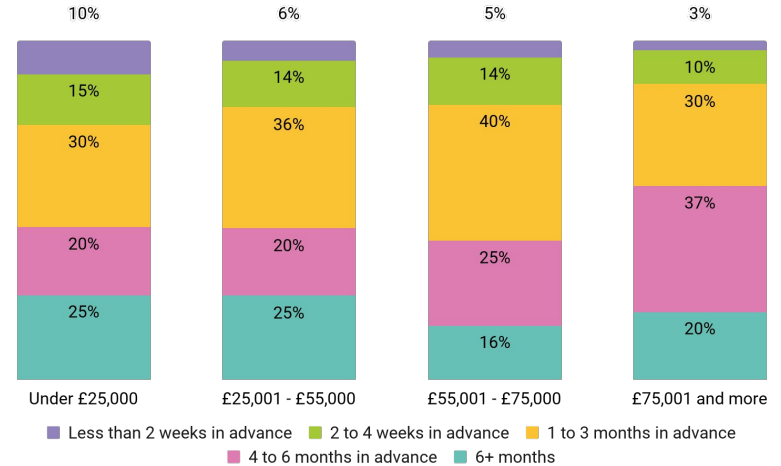
Phase 2: When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... - Review Options / Plan?

UK adults 18+ who plan to go on holiday in the British isles in 2021



Phase 4: When thinking about holidays and short breaks you want to take in 2022, how far in advance will you... - Review Options / Plan?

UK adults 18+ who plan to go on holiday in the British isles in 2022



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q11 - When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... Review Options / Plan?

Base: full sample. Under £25,000 (N=349), £25,001-£55,000 (N=499), £55,001-£75,000 (N=103), £75,001 and more (N=70). Phase 4: Under £25,000 (N=353), £25,001-£55,000 (N=405), £55,001-£75,000 (N=126), £75,001 and more (N=123) Data collected: 30th July - 3rd September 2021 (N=1,007). Q19.

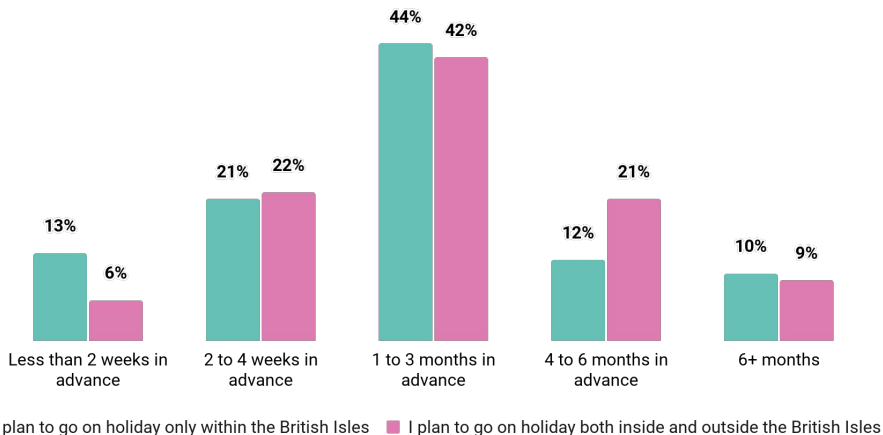


Those who go on holiday inside the British isles take longer time to book

This year, those booking domestically and abroad are planning their holidays further in advance than those booking holidays domestically and abroad a year ago.

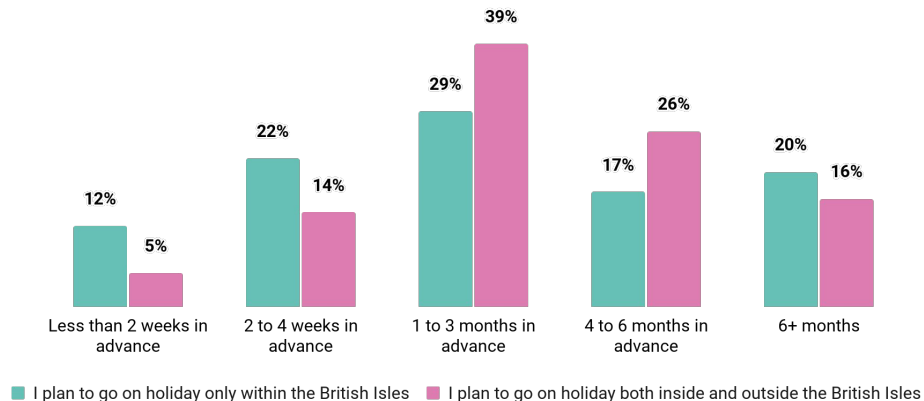
Phase 2: When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... - Book travel?

UK adults 18+ who plan to go on holiday in the British isles in 2021



Phase 4: When thinking about holidays and short breaks you want to take in 2022, how far in advance will you... - Book travel?

UK adults 18+ who plan to go on holiday in the British isles in 2022



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

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Base: those who plan to go on holiday only within the British Isles (N=433), those who plan to go on holiday both inside and outside the British Isles (N=588).

Phase 4: those who plan to go on holiday only within the British Isles (N=275), those who plan to go on holiday both inside and outside the British Isles (N=399).

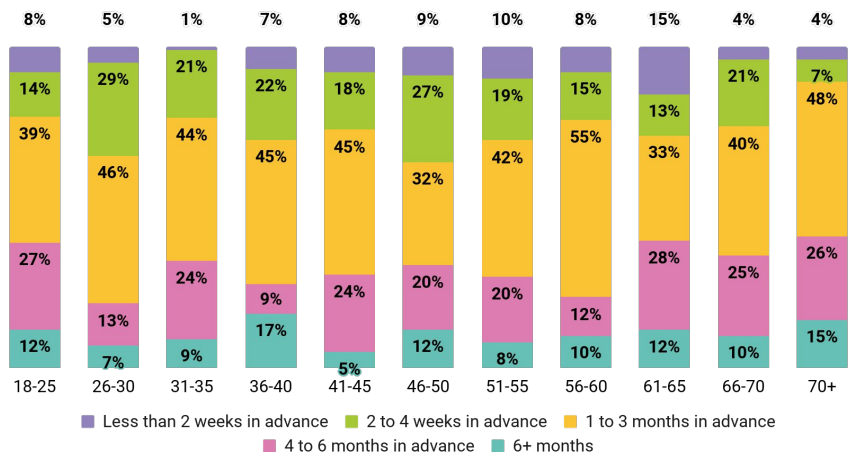
Data collected: 30th July - 3rd September 2021 (N=1,007). Q19.



All age groups book holidays between 1 to 3 months in advance

When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... - Book travel?

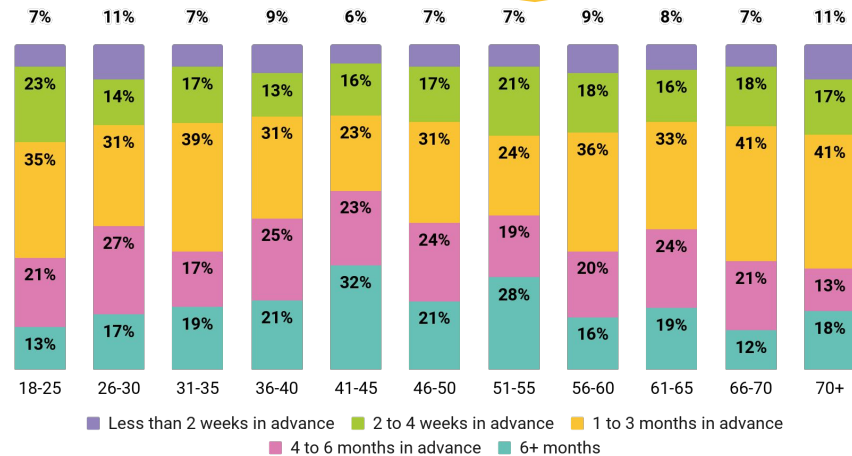
UK adults 18+ who plan to go on holiday in the British isles in 2021



When thinking about holidays and short breaks you want to take in 2022, how far in advance will you... - Book travel?

UK adults 18+ who plan to go on holiday in the British isles in 2022

Bookings in the last 4 weeks prior to holidays decreased significantly in general, but mostly for those 46+.



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020

(N=1,021). Q11 - When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... Book travel?

Base: 18-25 years old (N=135), 26-30 years old (N=88), 31-35 years old (N=87), 36-40 years old (N=80), 41-45 years old (N=87), 46-50 years old (N=93), 51-55 years old (N=89), 56-60 years old (N=76), 61-65 years old (N=69), 66-70 years old (N=70), more than 70 (N=147). Phase 4 (N=1,007): 18-25 years old (N=133), 26-30 years old (N=87), 31-35 years old (N=86), 36-40 years old (N=79), 41-45 years old (N=86), 46-50 years old (N=92), 51-55 years old (N=87), 56-60 years old (N=75), 61-65 years old (N=68), 66-70 years old (N=69), more than 70 (N=145). Data collected: 30th July - 3rd September 2021 (N=1,007). Q19.



Those with higher income tend to book less in advance

Bookings 4 to 6 months and 6+ months in advance of holidays became more popular across all the income ranges, with no significant difference between smallest and largest household incomes.

Phase 2: When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... - Book travel?

UK adults 18+ who plan to go on holiday in the British isles in 2021



Phase 4: When thinking about holidays and short breaks you want to take in 2022, how far in advance will you... - Book travel?

UK adults 18+ who plan to go on holiday in the British isles in 2022



■ 2 to 4 weeks in advance ■ 1 to 3 months in advance ■ 4 to 6 months in advance ■ 6+ months

■ 2 to 4 weeks in advance ■ 1 to 3 months in advance ■ 4 to 6 months in advance ■ 6+ months

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q11 - When thinking about holidays and short breaks you want to take in 2021, how far in advance will you... Book travel?

Base: full sample. Under £25,000 (N=349), £25,001-£55,000 (N=499), £55,001-£75,000 (N=103), £75,001 and more (N=70). Phase 4 (N=1,007): Under £25,000 (N=353), £25,001-£55,000 (N=405), £55,001-£75,000 (N=126), £75,001 and more (N=123) Data collected: 30th July - 3rd September 2021. Q19.



Rare: consulting

Most people gather info through online and digital ads

When thinking about booking holiday and short breaks in 2021, which of the following will help you when gathering information?

UK adults 18+ who plan to go on holiday in the British isles in 2021



2nd Phase

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q12 - When thinking about booking holiday and short breaks in 2021, which of the following will help you when gathering information?

Base: full sample (N=1,021).



Most people gather info through advertising on TV and online

When thinking about booking holiday and short breaks in 2022, which of the following will help you when gathering information?

UK adults 18+ who plan to go on holiday in the British isles in 2022



4th Phase

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 4 data collected: 30th July - 3rd September 2021 (N=1,007). Q20 - When thinking about booking holiday and short breaks in 2021, which of the following will help you when gathering information?
Base: full sample (N=1,007).

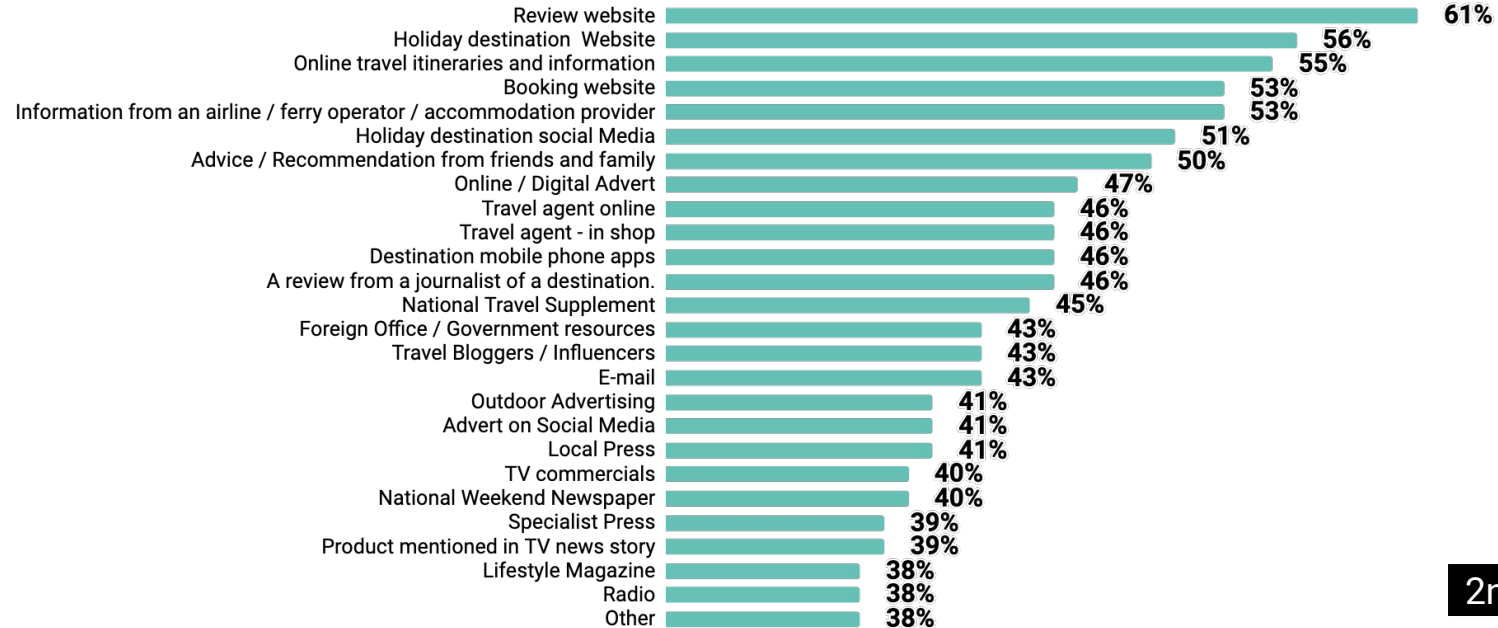


In phase 2 most people evaluated their choice through review websites

When thinking about booking holiday and short breaks in 2021, which of the following will help you when evaluating your choice?

UK adults 18+ who plan to go on holiday in the British isles in 2021

Review websites play the most pivotal role in helping consumers to evaluate their choices, followed by holiday destination websites.



2nd Phase

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q12 - When thinking about booking holiday and short breaks in 2021, which of the following will help you when when evaluating your choice?

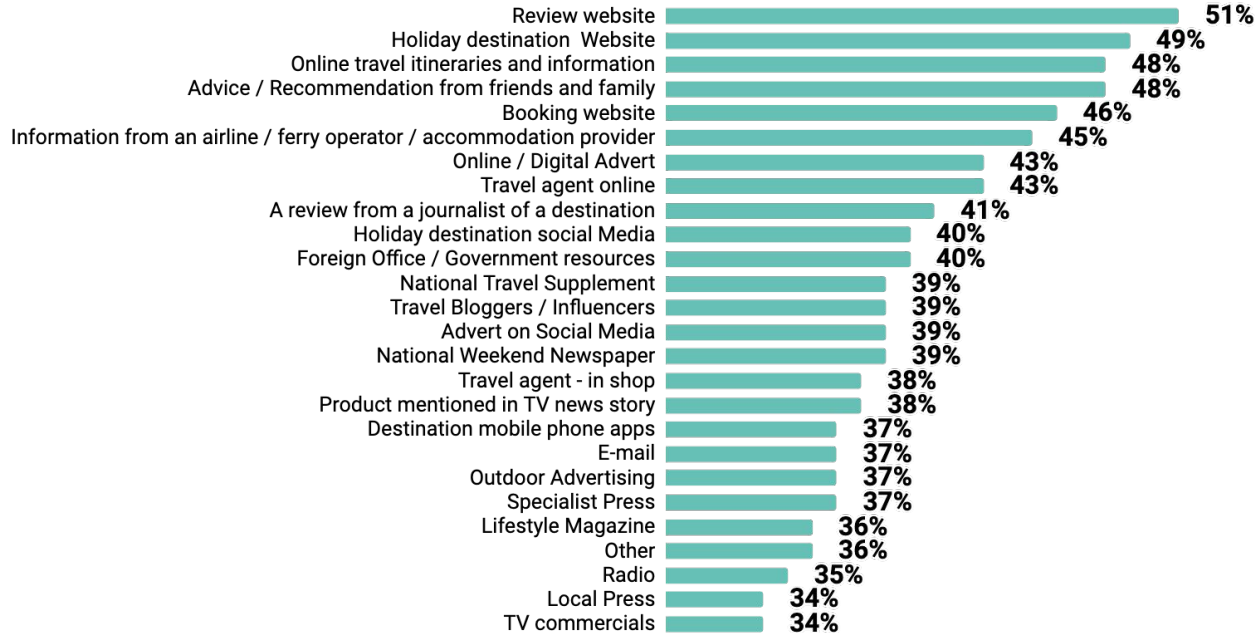
Base: full sample (N=1,021).



Use of review websites for evaluating choices shrank in phase 4

When thinking about booking holiday and short breaks in 2022, which of the following will help you when evaluating your choice?

UK adults 18+ who plan to go on holiday in the British isles in 2022



There was a 10 percentage point drop in consideration of use of review sites for choice evaluation compared to phase 2, however it remains the top source. Holiday destination websites, online travel itineraries and advice from family/friends all play an important part in the choice making process.

4th Phase

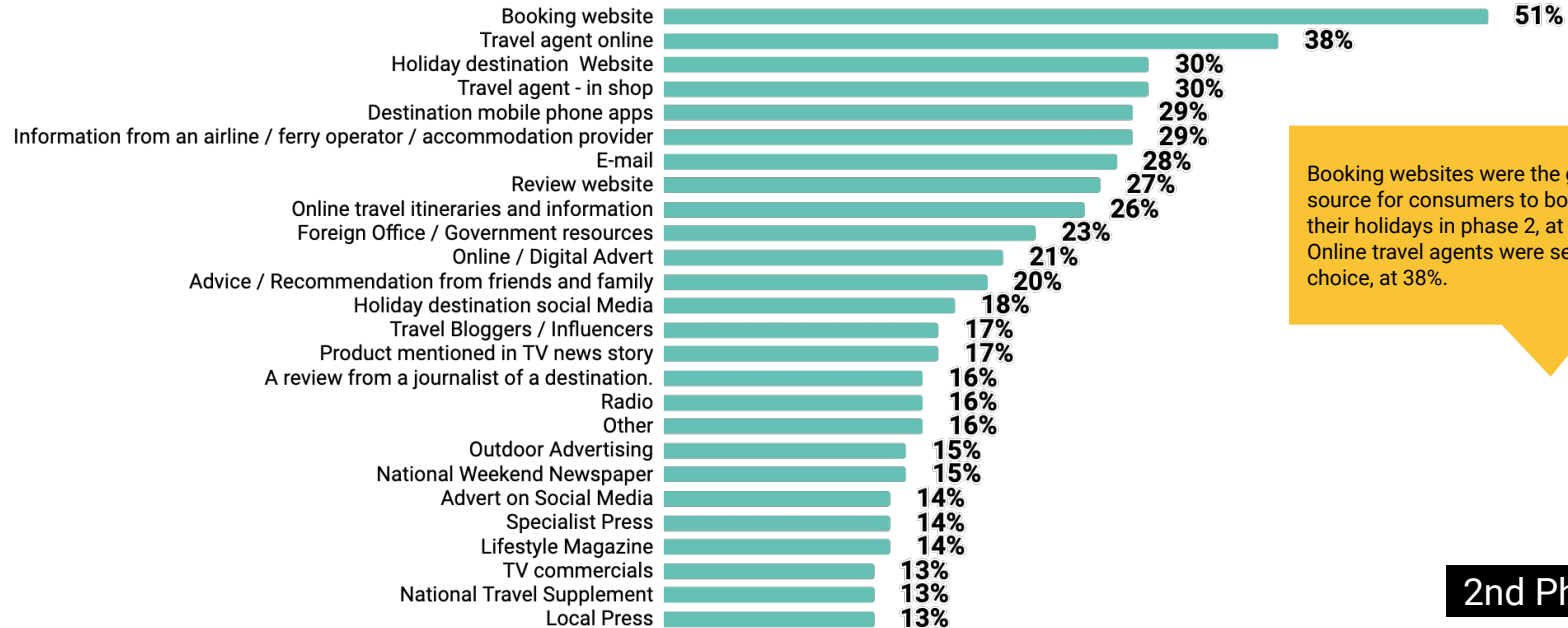
Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 4 data collected: 30th July - 3rd September 2021 (N=1,007). Q20 - When thinking about booking holiday and short breaks in 2021, which of the following will help you when evaluating your choice?



Phase 2: most booking done via booking websites and online agents

When thinking about booking holiday and short breaks in 2021, which of the following will help you when booking your chosen holiday/short break?

UK adults 18+ who plan to go on holiday in the British isles in 2021



Booking websites were the go-to source for consumers to booking their holidays in phase 2, at 51%. Online travel agents were second choice, at 38%.

2nd Phase

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

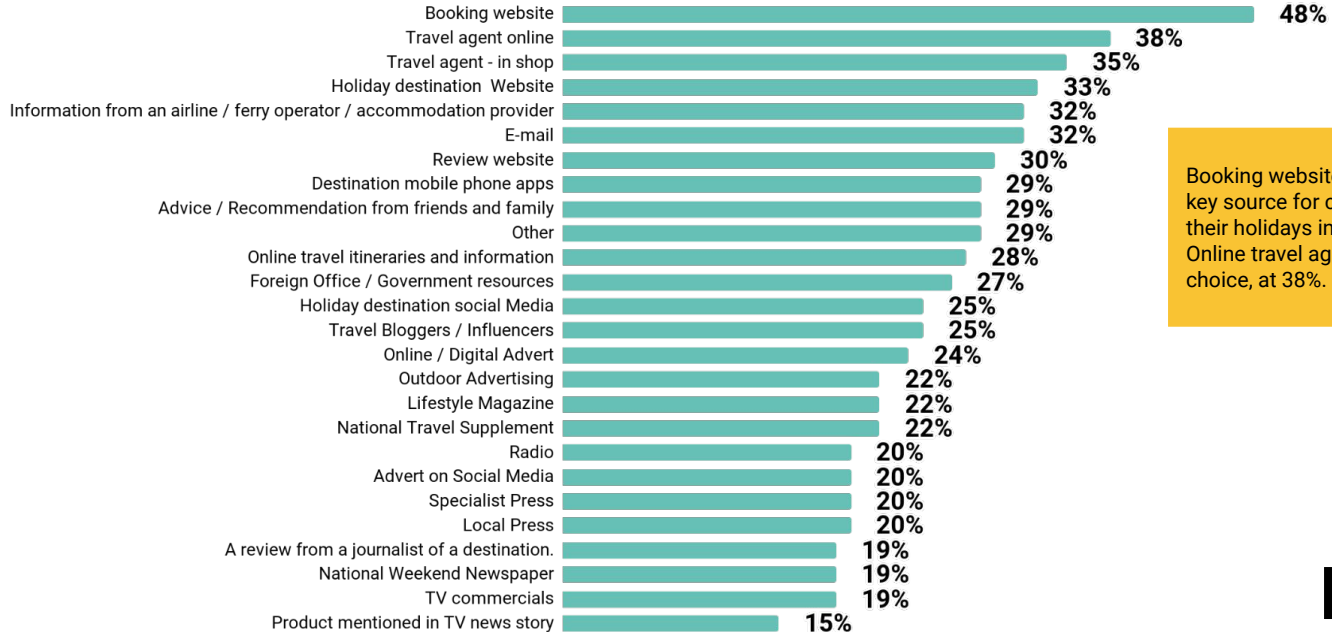
Q12 - When thinking about booking holiday and short breaks in 2021, which of the following will help you when gathering information?

Base: full sample (N=1,021).

Phase 4: booking websites remain most popular, followed by online agents

When thinking about booking holiday and short breaks in 2022, which of the following will help you when booking your chosen holiday/short break?

UK adults 18+ who plan to go on holiday in the British isles in 2022



Booking websites remained the key source for consumers to book their holidays in phase 4, at 48%. Online travel agents were second choice, at 38%.

4th Phase

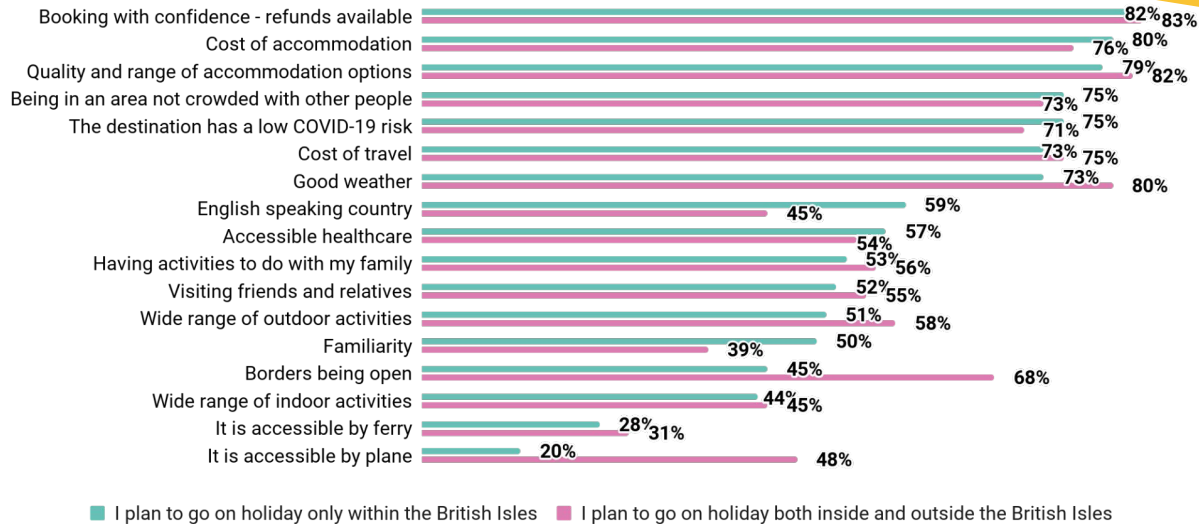
Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 4 data collected: 30th July - 3rd September 2021 (N=1,007). Q20 - When thinking about booking holiday and short breaks in 2021, which of the following will help you when booking your chosen holiday/short break? Phase 4: full sample (N=1,007).

Costs, quality and safeness are key

When thinking about choosing a destination for a holiday and short break in 2022 in the British Isles, to what extent is each of the following important to you?

UK adults 18+ who plan to go on holiday in the British isles in 2022

The most important thing for those travelling within and outside the British Isles comes to ensure that future restrictions will not make them lose the investment. Costs, quality of accommodation and Covid-19 safe measures are clearly key topics.



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 4 data collected: 30th July - 3rd September 2021 (N=1,007). Q30 - When thinking about choosing a destination for a holiday and short break in 2021 in the British Isles, to what extent is each of the following important to you? Base: those who plan to go on holiday only within the British Isles (N=275), those who plan to go on holiday both inside and outside the British Isles (N=399).



HOLIDAY EXPERIENCE

Highlights - Holiday experience

7-NIGHT COASTAL BREAKS FOR FAMILY COULD BE AN OPPORTUNITY FOR THE ISLE OF MAN

Those who go away for 2-4 nights prefer to invest their time on city breaks (60%), attending events (60%) and sporting holidays which entail golf (58%), cycling (57%) and adventure activities (53%). Whereas, those who go away for longer periods of time, 7 to 8+ days, seek to break away from their normal routine, go walking, be amongst wildlife and be surrounded by beautiful landscapes. City breaks are the top destination for couples (54%), groups of friends prefer attending events (31%), families with children prefer adventurous (36%) and wildlife (35%) escapes, whereas people going on holiday on their own prefer to engage in relaxation and wellness activities (23%), and golf (23%).

HOTELS ARE PREFERRED FOR LONGER STAYS

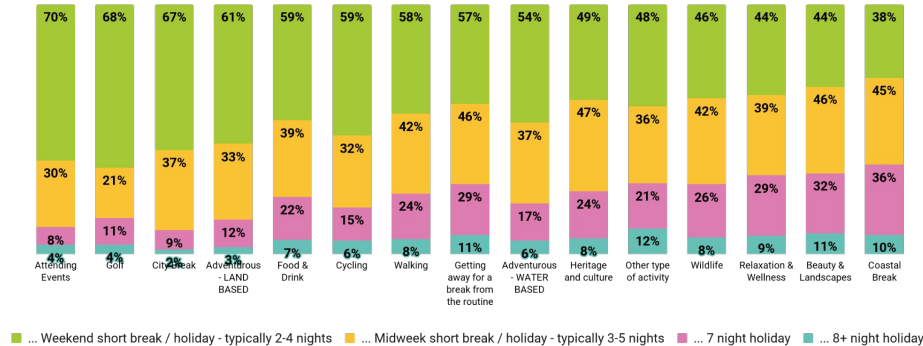
Most of those who go on weekend 2-4 night breaks prefer Inns (60%), B&Bs (59%) and hostels (59%). Those who go for midweek short breaks prefer to stay in hotels (46%), serviced apartments (42%) and self catering (42%). Similarly, those who go away for longer periods of time, 7 to 8+ days, seek out hotels (60%), serviced apartments (53%) and self catering (63%) options. Also family units with children and multigenerational families prefer self catering and serviced apartments (19% and 16%, respectively). Couples prefer to stay in Inns (55%), whereas those travelling on their own prefer to stay in hostels (26%) or with family and friends (25%).

Longest holidays are for relaxing and culture

Short breaks are being used for short visits to cities, attending events and sporting holidays including adventures. On the other hand, relaxation, walking, enjoying wildlife, nature and landscapes are preferred experiences when it comes to longest holiday periods. These trends have remained constant across phase 2 and phase 4.

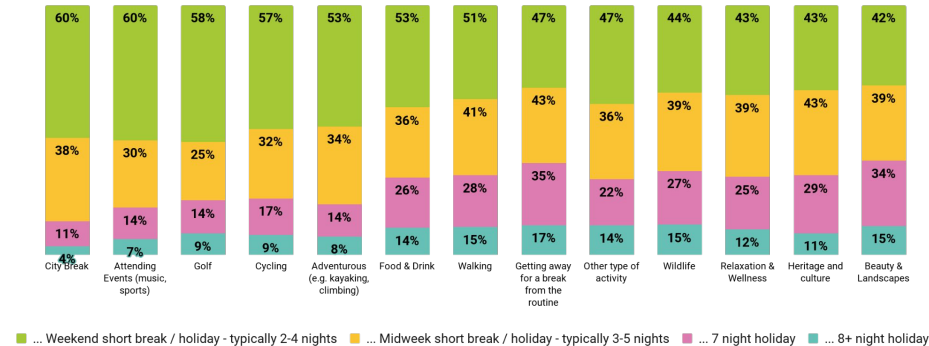
Phase 2: When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when taking...

UK adults 18+ who plan to go on holiday in the British isles in 2021



Phase 4: When thinking about holidays and short breaks in the British Isles you want to take in 2022, what kind of holiday experience are you seeking when taking...

UK adults 18+ who plan to go on holiday in the British isles in 2022



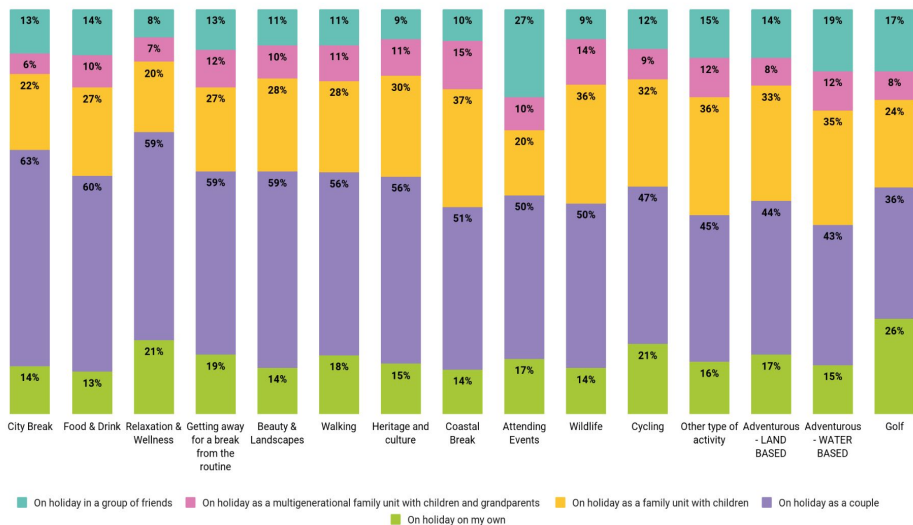
Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q14 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when taking... Base: full sample (N=1,021). Phase 4: full sample. Data collected: 30th July - 3rd September 2021 (N=1,007). Q23.

Couples prefer city breaks

Couples prefer to visit cities and to break away from their normal routine. They also enjoy relaxation and wellness holidays, beautiful landscapes and good food and drink. They are less interested in golfing and adventure holidays.

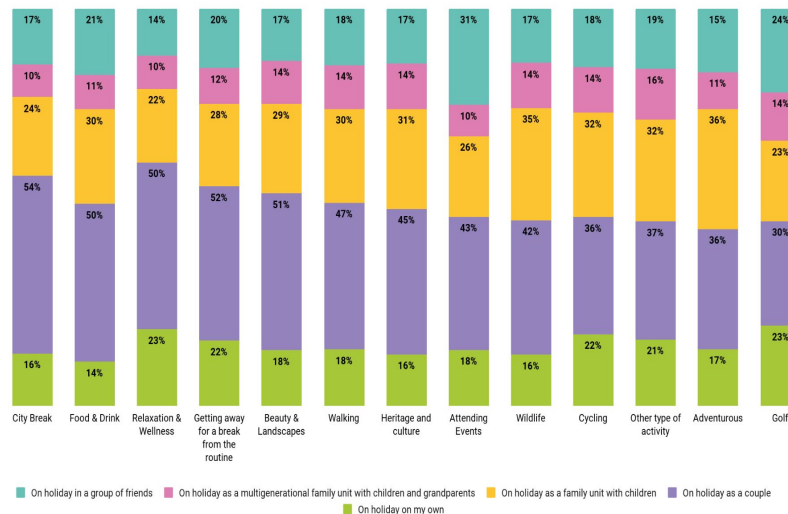
Phase 2: When thinking about holidays & short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when going...

UK adults 18+ who plan to go on holiday in the British Isles in 2021



Phase 4: When thinking about holidays & short breaks in the British Isles you want to take in 2022, what kind of holiday experience are you seeking when going...

UK adults 18+ who plan to go on holiday in the British Isles in 2022



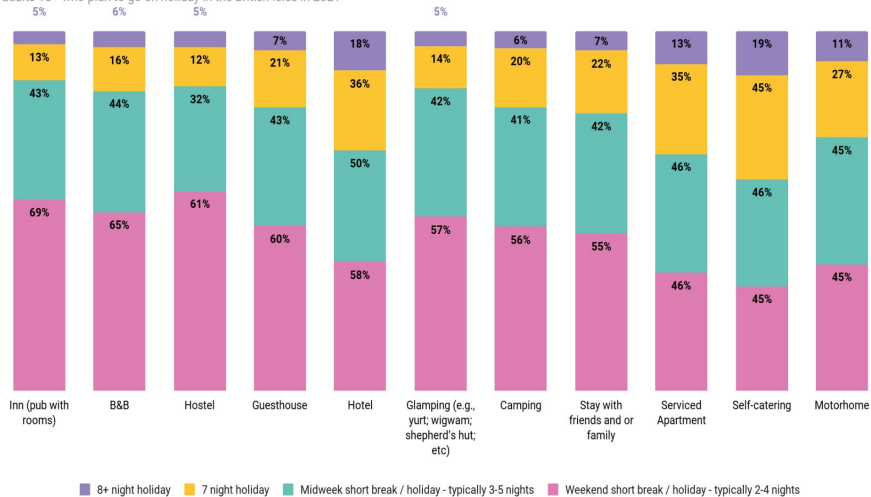
Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q14 - When thinking about holidays & short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when going... Base: full sample (N=1,021). Phase 4: full sample (N=1,007). Q24.

People taking longer holidays prefer hotels

People prefer to go glamping, camping and stay in hostels for weekend short breaks. Whereas on longer holidays lasting 8+ nights, they prefer to stay in hotels and serviced apartments.

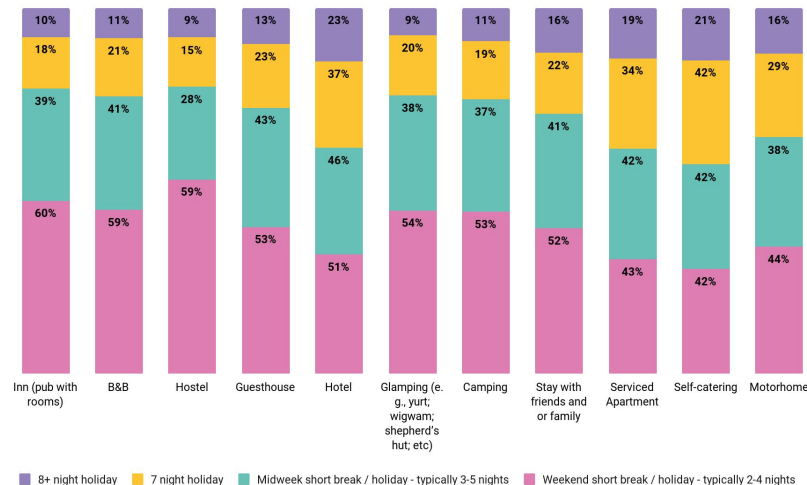
Phase 2: When thinking about holidays and short breaks in the British Isles you want to take in 2021, what type of accommodation would you consider using for...

UK adults 18+ who plan to go on holiday in the British Isles in 2021



Phase 4: When thinking about holidays and short breaks in the British Isles you want to take in 2022, what type of accommodation would you consider using for...

UK adults 18+ who plan to go on holiday in the British Isles in 2022



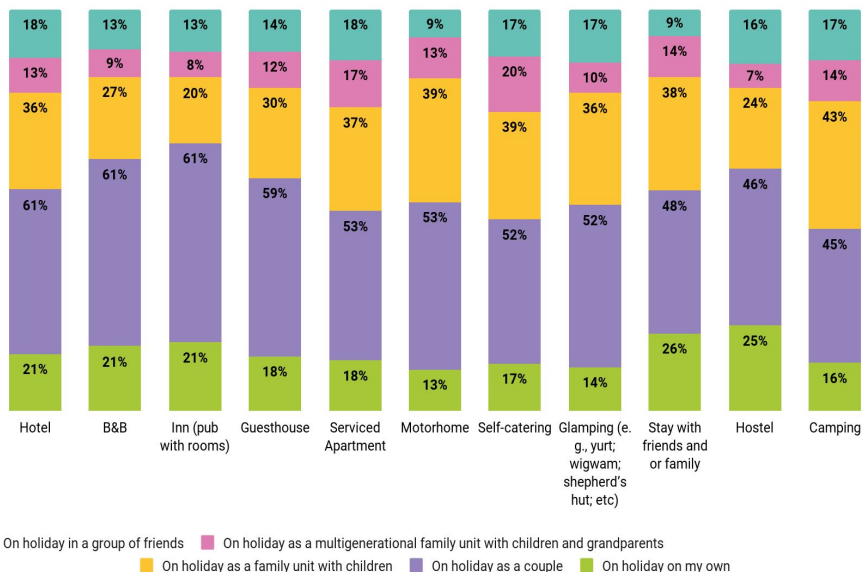
Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q16 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what type of accommodation would you consider using for... Base: full sample (N=1,021). Phase 4: full sample (N=1,007). Q25.

Couples prefer inns, families prefer motorhomes and camping

Couples prefer to stay in inns, B&Bs and hotels. Whereas families with children prefer motorhomes, apartments, self-catering and glamping. People travelling alone prefer to stay in hostels, and with friends and family.

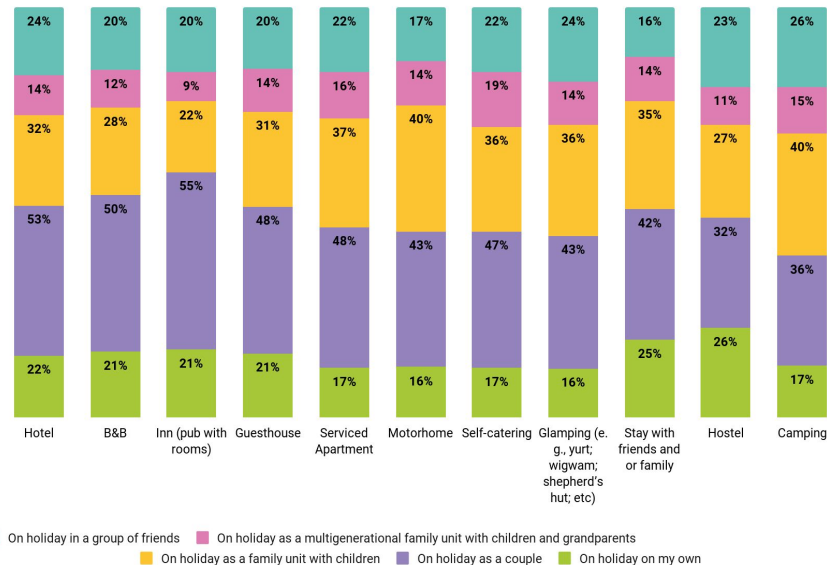
Phase 2: When thinking about holidays and short breaks in the British Isles you want to take in 2021, what type of accommodation would you consider using for...

UK adults 18+ who plan to go on holiday to the British Isles in 2021



Phase 4: When thinking about holidays and short breaks in the British Isles you want to take in 2022, what type of accommodation would you consider using for...

UK adults 18+ who plan to go on holiday to the British Isles in 2022



Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q17 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what type of accommodation would you consider using for... Base: full sample (N=1,021). Phase 4: full sample. Data collected: 30th July - 3rd September 2021 (N=1,007). Q27.

Genders are more balanced in the last phase

The percentage of males and females who chose the long or short option for each type of holidays.
The index shows how those figures compare to total population in both phases.

The percentage of the total sample.

Example: 46% chose the option "Adventurous experience" when going on holiday weekend and midweek up to 5 days.

		Total		Male		Index		Female		Index	
		Phase 2	Phase 4	Phase 2	Phase 4	Phase 2	Phase 4	Phase 2	Phase 4	Phase 2	Phase 4
Adventurous	Weekend & Midweek	46%	43%	45%	44%	98	103	47%	42%	102	97
	7+ nights	9%	11%	11%	10%	118	90	8%	12%	84	110
Breaks	Weekend & Midweek	48%	47%	48%	47%	100	101	49%	47%	100	100
	7+ nights	16%	17%	17%	17%	106	100	15%	17%	94	100
Relax & food	Weekend & Midweek	46%	43%	46%	42%	101	98	45%	44%	100	102
	7+ nights	17%	19%	18%	20%	110	104	15%	18%	91	96
Nature & Culture	Weekend & Midweek	46%	42%	45%	42%	100	100	46%	42%	100	100
	7+ nights	18%	22%	21%	22%	116	99	16%	22%	86	100
Golf	Weekend & Midweek	45%	41%	42%	40%	95	97	47%	42%	105	103
	7+ nights	7%	12%	10%	13%	131	113	5%	10%	72	86
Walking	Weekend & Midweek	50%	46%	50%	44%	101	97	50%	47%	100	103
	7+ nights	16%	21%	21%	21%	127	102	12%	21%	75	98
Cycling	Weekend & Midweek	46%	45%	44%	45%	96	100	47%	44%	103	100
	7+ nights	11%	13%	14%	13%	134	100	7%	13%	69	100
Attending events	Weekend & Midweek	50%	45%	50%	44%	101	97	49%	47%	99	103
	7+ nights	6%	10%	7%	10%	122	95	5%	11%	81	105

- Adventurous - LAND BASED
- Adventurous - WATER BASED
- Break from the routine
- City Break
- Coastal Break
- Relaxation & Wellness
- Food & Drink
- Heritage and culture
- Wildlife
- Beauty & Landscapes

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021/2022. Phase 2 data collected 9th - 17th September 2020 (N=1,021).

Q14 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when taking...

Base: Males (N=488), females (N=517). Phase 4: Males (N=491), Females (N=516). Data collected: 30th July - 3rd September 2021 (N=1,007).

Q23. * Index vs. total population. Green / Red numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.



46+ groups score higher in experiences split by length of stays

2nd Phase

		Total	18-30	Index	31-45	Index	46-65	Index	66+	Index
Adventurous	Weekend & Midweek	46%	46%	99	47%	102	46%	99	45%	97
	7+ nights	9%	9%	94	10%	111	8%	90	11%	112
Breaks	Weekend & Midweek	48%	44%	90	46%	96	49%	101	56%	116
	7+ nights	16%	14%	84	16%	97	18%	112	16%	101
Relax & food	Weekend & Midweek	46%	41%	90	45%	98	47%	104	52%	114
	7+ nights	17%	16%	95	15%	90	18%	105	19%	115
Nature & Culture	Weekend & Midweek	46%	42%	91	48%	105	44%	95	52%	113
	7+ nights	18%	14%	80	15%	82	24%	133	19%	103
Golf	Weekend & Midweek	45%	45%	100	45%	100	46%	103	40%	89
	7+ nights	7%	7%	91	8%	107	6%	85	13%	175
Walking	Weekend & Midweek	50%	48%	96	51%	102	48%	96	56%	112
	7+ nights	16%	10%	62	13%	82	23%	141	19%	114
Cycling	Weekend & Midweek	46%	45%	99	45%	99	45%	98	53%	116
	7+ nights	11%	9%	89	10%	98	13%	128	6%	58
Attending events	Weekend & Midweek	50%	48%	98	52%	105	49%	98	48%	97
	7+ nights	6%	6%	109	4%	73	7%	115	7%	116

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q14 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when taking... Base: full sample 18-30 (N=223), 31-45 (N=254), 46-65 (N=327), 66+ (N=217). * Index vs. total population. **Green / Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.



Oldest index higher for short breaks, youngest for long stays

4th Phase

		Total	18-30	Index	31-45	Index	46-65	Index	66+	Index
Adventurous	Weekend & Midweek	46%	42%	96	43%	100	45%	104	45%	104
	7+ nights	9%	11%	105	11%	104	10%	89	11%	96
Breaks	Weekend & Midweek	48%	39%	84	48%	103	50%	107	53%	113
	7+ nights	16%	19%	113	16%	95	17%	98	16%	94
Relax & food	Weekend & Midweek	46%	35%	82	45%	105	44%	102	50%	117
	7+ nights	17%	21%	109	16%	84	20%	105	21%	107
Nature & Culture	Weekend & Midweek	46%	37%	88	45%	108	41%	99	45%	108
	7+ nights	18%	19%	86	18%	84	25%	117	26%	121
Golf	Weekend & Midweek	45%	38%	91	43%	106	45%	109	43%	104
	7+ nights	7%	16%	133	10%	83	9%	75	10%	84
Walking	Weekend & Midweek	50%	43%	94	47%	103	44%	96	53%	116
	7+ nights	16%	16%	77	19%	92	27%	126	24%	114
Cycling	Weekend & Midweek	46%	43%	97	43%	97	46%	103	50%	112
	7+ nights	11%	13%	101	14%	105	13%	100	13%	101
Attending events	Weekend & Midweek	50%	42%	92	48%	105	48%	105	45%	99
	7+ nights	6%	14%	135	8%	79	8%	80	11%	104

Whereas youngest groups have higher index scores for longest periods than a week, the oldest people tend to index higher in stays shorter than a week.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 4 data collected: 30th July - 3rd September 2021 (N=1,007).

Q23 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when taking...

Base: 18-30 (N=155), 31-45 (N=268), 46-65 (N=407), 66+ (N=175). *Index vs. total population. **Green / Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.



Rare: [consulting]

Phase 2: South East, West and East Midlands scored higher than other locations

2nd Phase

		South East	Index
Nature & Culture	7+ nights	22%	123
Adventurous	7+ nights	13%	138
Walking	7+ nights	19%	115

Walking scores high in all three regions

		West Midlands	Index
Walking	7+ nights	27%	165
Relax & Food	7+ nights	24%	144
Cycling	7+ nights	16%	149

		East Midlands	Index
Nature & Culture	7+ nights	24%	133
Walking	7+ nights	23%	141
Golf	7+ nights	16%	216

Of all the regions analysed South East, West Midlands and East Midlands show higher indexes across all the categories. The tables show the three highest indexes per region.

In all three these regions (and almost all the others) 7+ nights stays score higher than shorter breaks.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Data Collected 9th - 17th September 2020 (N=1,021). Q14 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when taking... Base: full sample (N=1,021). * Index vs. total population. **Green / Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

Phase 4: Top scoring regions are London, South West and South East of England

4th Phase

		London	Index
Attending events	7+ nights	16%	152
Adventurous	7+ nights	16%	135
Cycling	7+ nights	17%	132

		South East	Index
Walking	7+ nights	27%	128
Adventurous	7+ nights	13%	121
Attending events	7+ nights	13%	123

		South West	Index
Cycling	7+ nights	16%	126
Walking	7+ nights	26%	124
Relax & Food	7+ nights	23%	119

Walking scores high in all three regions

Of all the regions analysed, London, South East and South West show higher indexes across all the categories. The tables show the three highest indexes per region.

In all three these regions (and almost all the others) 7+ nights stays score higher than shorter breaks.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 4 data collected: 30th July - 3rd September 2021 (N=1,007). Q23 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when taking... Base: London(N=132), South East (N=130), South West (N=89). *Index vs. total population. Green / Red numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

Males score higher when doing activity on their own

		Total	Male	Index	Female	Index
Adventurous	On my own	16%	22%	139	10%	65
	Couple	44%	40%	92	47%	107
	Family	22%	21%	97	23%	102
	Group	16%	16%	96	17%	104
Breaks	On my own	16%	18%	114	14%	88
	Couple	58%	58%	101	57%	99
	Family	20%	18%	90	22%	109
	Group	12%	10%	82	14%	117
Relax & Food	On my own	17%	19%	110	15%	91
	Couple	60%	59%	99	60%	101
	Family	16%	16%	98	16%	102
	Group	11%	8%	78	13%	121
Nature & Culture	On my own	15%	19%	128	11%	74
	Couple	55%	53%	98	56%	102
	Family	21%	20%	94	23%	105
	Group	10%	8%	83	11%	116
Golf	On my own	26%	39%	147	15%	55
	Couple	36%	28%	78	43%	121
	Family	16%	16%	98	16%	102
	Group	17%	15%	87	19%	112
Walking	On my own	18%	22%	121	15%	81
	Couple	56%	55%	99	57%	101
	Family	20%	18%	93	21%	107
	Group	11%	11%	100	11%	100
Cycling	On my own	21%	28%	131	15%	70
	Couple	47%	41%	87	53%	112
	Family	21%	22%	106	20%	94
	Group	12%	11%	89	13%	111
Attending events	On my own	17%	22%	127	13%	75
	Couple	50%	50%	100	50%	100
	Family	15%	13%	89	17%	110
	Group	27%	23%	85	31%	114

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 data collected 9th - 17th September 2020 (N=1,021). Q15 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when going... Base: full sample Males (N=488), females (N=517). * Index vs. total population. **Green** / **Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

Females prefer group activities (1/2)

		Total	Male	Index	Female	Index
Adventurous	On my own	17%	18%	108	16%	93
	Couple	36%	36%	100	37%	100
	Family w/ children	35%	33%	93	38%	108
	Multigen. family	11%	8%	73	14%	130
	Group	19%	18%	98	19%	101
Breaks	On my own	19%	18%	97	19%	103
	Couple	54%	58%	107	51%	93
	Family w/ children	25%	25%	99	25%	101
	Multigen. family	11%	9%	84	13%	116
	Group	18%	13%	72	22%	126
Relax & Food	On my own	18%	16%	90	20%	110
	Couple	52%	56%	107	48%	92
	Family w/ children	25%	25%	102	24%	98
	Multigen. family	10%	9%	94	11%	107
	Group	17%	11%	65	22%	134
Nature & Culture	On my own	16%	16%	97	17%	103
	Couple	47%	50%	107	44%	93
	Family w/ children	32%	31%	99	32%	101
	Multigen. family	13%	11%	84	15%	116
	Group	16%	13%	77	20%	122

Males score higher in activities on their own or as a couple. However, female indices are higher for activities as a family or as a group

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 4 data collected: 30th July - 3rd September 2021 (N=1,007). Q24 - When thinking about holidays and short breaks in the British Isles you want to take in 2022, what kind of holiday experience are you seeking when going... Base: Males (N=491), Females (N=516). * Index vs. total population. **Green / Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

Females prefer group activities (2/2)

Sporting activities' indices are clearly below the average for men when it comes to be on holiday as a family or a group. On the other hand, females value these activities even as a group.

		Total	Male	Index	Female	Index
Golf	On my own	23%	26%	110	21%	90
	Couple	31%	28%	90	34%	112
	Family w/ children	22%	22%	100	22%	99
	Multigen. family	12%	11%	94	13%	105
	Group	23%	25%	105	22%	96
Walking	On my own	19%	20%	107	17%	94
	Couple	48%	51%	106	45%	93
	Family w/ children	30%	30%	99	30%	100
	Multigen. family	13%	10%	81	15%	120
	Group	17%	13%	73	22%	127
Cycling	On my own	22%	23%	104	21%	97
	Couple	37%	39%	104	35%	95
	Family w/ children	32%	30%	93	34%	107
	Multigen. family	13%	12%	93	14%	108
	Group	17%	15%	86	20%	116
Attending events	On my own	18%	20%	113	16%	88
	Couple	43%	44%	100	43%	100
	Family w/ children	26%	25%	97	27%	103
	Multigen. family	10%	9%	92	11%	109
	Group	30%	26%	85	34%	115

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 4 cata collected: 30th July - 3rd September 2021 (N=1,007). Q24 - When thinking about holidays and short breaks in the British Isles you want to take in 2022, what kind of holiday experience are you seeking when going... Base: Males (N=491), Females (N=516). * Index vs. total population. **Green** / **Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

18-30

overindex
across most
categories
(1/2)

		Total	18-30	Index	31-45	Index	46-65	Index	66+	Index
Adventurous	On my own	17%	18%	103	15%	90	18%	108	18%	105
	Couple	36%	32%	87	30%	83	43%	118	52%	143
	Family w/ children	35%	36%	103	47%	131	30%	84	8%	23
	Multigen. family	11%	14%	134	9%	82	9%	82	16%	151
	Group	19%	24%	126	20%	105	14%	77	16%	85
Breaks	On my own	19%	20%	105	17%	93	19%	101	19%	105
	Couple	54%	43%	80	47%	86	59%	108	69%	127
	Family w/ children	25%	32%	126	38%	152	21%	83	5%	21
	Multigen. family	11%	17%	152	10%	95	9%	84	9%	83
	Group	18%	25%	138	17%	94	16%	90	17%	96
Relax & Food	On my own	18%	19%	105	18%	101	17%	96	18%	103
	Couple	52%	38%	73	44%	86	59%	113	65%	126
	Family w/ children	25%	32%	129	38%	153	20%	79	4%	16
	Multigen. family	10%	20%	201	7%	74	8%	83	7%	71
	Group	17%	21%	129	17%	102	14%	82	18%	108
Nature & Culture	On my own	16%	18%	111	15%	94	16%	96	18%	108
	Couple	47%	35%	75	36%	76	54%	114	65%	139
	Family w/ children	32%	36%	114	49%	154	27%	85	7%	21
	Multigen. family	13%	21%	161	13%	99	11%	83	9%	70
	Group	16%	23%	140	14%	88	14%	83	18%	111

Whereas youngest group of people score higher in almost all categories, from 46 years old and older score higher when it comes to go on holidays as a couple.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 2 data collected 9th - 17th September 2020 (N=1,007).

Q24 - When thinking about holidays and short breaks in the British Isles you want to take in 2022, what kind of holiday experience are you seeking when going..

Base: 18-30 (N=155), 31-45 (N=268), 46-65 (N=407), 66+ (N=175). * Index vs. total population. **Green** / **Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.



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Older score higher as a couple or on their own (2/2)

Young people tend to score higher when enjoying holidays as a family in more ludic activities too.

		Total	18-30	Index	31-45	Index	46-65	Index	66+	Index
Golf	On my own	23%	15%	66	23%	100	28%	120	34%	145
	Couple	31%	25%	81	30%	96	37%	120	34%	111
	Family w/ children	22%	30%	135	25%	111	17%	75	2%	11
	Multigen. family	12%	24%	194	8%	69	7%	55	10%	80
	Group	23%	24%	103	25%	105	21%	89	27%	114
Walking	On my own	19%	19%	104	18%	99	18%	99	19%	102
	Couple	48%	34%	70	42%	87	54%	112	64%	133
	Family w/ children	30%	38%	129	41%	139	27%	90	4%	14
	Multigen. family	13%	23%	179	12%	91	9%	70	12%	91
	Group	17%	22%	128	18%	106	14%	82	17%	100
Cycling	On my own	22%	18%	82	21%	97	20%	92	44%	203
	Couple	37%	33%	88	34%	91	44%	119	40%	106
	Family w/ children	32%	35%	110	41%	127	27%	85	2%	7
	Multigen. family	13%	21%	162	10%	83	9%	72	12%	92
	Group	17%	23%	130	18%	104	13%	75	16%	93
Attending events	On my own	18%	15%	85	18%	105	18%	101	21%	117
	Couple	43%	37%	86	43%	98	46%	105	55%	127
	Family w/ children	26%	32%	123	32%	124	23%	87	2%	7
	Multigen. family	10%	15%	150	10%	105	6%	60	10%	104
	Group	30%	38%	127	30%	99	26%	88	24%	80

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 2 data collected 9th - 17th September 2020 (N=1,007).

Q24 - When thinking about holidays and short breaks in the British Isles you want to take in 2022, what kind of holiday experience are you seeking when going...

Base: 18-30 (N=155), 31-45 (N=268), 46-65 (N=407), 66+ (N=175). * Index vs. total population. Green / Red numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

London, East Midlands and Scotland score higher than other locations

2nd Phase

		London	Index
Relax & Food	Family	24%	149
Cycling	Group	23%	195
Walking	Group	16%	151

		East Midlands	Index
Cycling	On my own	35%	165
Adventurous	Group	31%	189
	On my own	27%	173

		Scotland	Index
Cycling	On my own	35%	168
Nature & Culture	On my own	23%	156
Relax & Food	Group	15%	138

Cycling scores high in all three regions

Of all the regions analysed London, East Midlands and Scotland show higher indexes across all the categories. The tables show the three highest indexes per region.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2021. Phase 2 Data Collected 9th - 17th September 2020 (N=1,021). Q15 - When thinking about holidays and short breaks in the British Isles you want to take in 2021, what kind of holiday experience are you seeking when going... Base: full sample (N=1,021). * Index vs. total population. **Green** / **Red** numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

Multigenerational family holidays score highest

4th Phase

		London	Index
Relax & Food	Multigen. family	21%	191
Attending events	Multigen. family	19%	183
Nature & Culture	Multigen. family	22%	162

		Yorkshire & The Humber	Index
Adventurous	Multigen. family	19%	144
Relax & Food	Multigen. family	14%	141
Nature & Culture	Group	23%	139

		South East	Index
Walking	On my own	26%	143
Relax & Food	On my own	31%	138
Attending events	Couple	57%	135

Highest scores are on holidays with all the family.

Relax & Food is in the top three scores within the three different regions.

Of all the regions analysed London, South East of England and Yorkshire and The Humber show higher indexes across all the categories. The tables show the three highest indexes per region.

Source: Rare Consulting. UK Adults 18+ planning to go on holiday in the British Isles in 2022. Phase 2 data collected 9th - 17th September 2020 (N=1,007). Q24 - When thinking about holidays and short breaks in the British Isles you want to take in 2022, what kind of holiday experience are you seeking when going... Base: London (N=132), Yorkshire and The Humber (N=106), South East of England (N=130) * Index vs. total population. Green / Red numbers represent scores that are higher / lower than the rest of the sample (95% level, 2-tailed) 99 and below in red, 100 in grey, 100+ in green.

Rare:[group]

THANKS!

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The Process

