



NB: all index scores colour coded:

Over-index of 115 or above = green  
Under-index of 85 or below = red

**OPPORTUNITY**

Size of DMs in market, proportion who made biggest contribution and proportion who were in high-spending mode (all indexed against all DMs across markets)  
MG HIGH SPENDING 48% [89]

**DEMOGRAPHICS**

MG age (mean) 39 [100]  
Age and gender of decision makers in market indexed against decisions makers across all markets  
MG Female 53% [92]  
MG Male 55% [110]

**ACCOMODATION (TOP 3)**

Accommodation on MG trip among decisions makers in market indexed against decision makers across markets  
Mid-range hotel 48% [102]  
High-end hotel 22% [88]  
Cruise ship 16% [160]

**TRANSPORT**

Transport on MG trip among decisions makers in market indexed against decision makers across markets  
Flight 69% [93]  
Ocean liner 4% [4]  
Train 14% [82]

**AREAS OF INTEREST (TOP 5)**

England areas of interest among all decision makers in market who visited/considered or would consider England indexed against the same group across markets  
London 66% [99]  
Manchester 33% [97]  
Stratford-upon-Avon 30% [95]  
Cambridge 26% [79]  
Liverpool 25% [81]

**ENGLAND DRIVERS (TOP 10)**

England drivers, i.e. reasons for visiting or considering visiting England, among all decision makers in market who visited/considered or would consider visiting England indexed against the same group across markets  
Great cultural attractions 35% [106]  
They speak English 34% [131]  
Offers a good mix of old and new 29% [112]  
Offers a wide variety of places to visit around the country 28% [104]  
Its culture is different from anywhere else in the world 26% [100]  
To sample the local culture 26% [124]  
Great contemporary culture 25% [114]  
Is a safe / secure destination 23% [68]  
Its countryside and natural beauty 22% [56]  
Has vibrant cities 22% [71]

**Product      Touring route      Outdoor activity      Single destination**

Top 3 box scores (on 7-point scale) among decision makers in market indexed against decision makers across markets  
Appeal (top 3 box) 60% [105]      56% [104]      59% [105]  
Stand out (top 3 box) 65% [109]      58% [100]      63% [105]  
Fit (top 3 box) 62% [100]      56% [93]      63% [102]



**OPPORTUNITY**

MG KDMs	<b>44%</b> [100]
MG KDMs paying	<b>66%</b> [96]
MG HIGH spending	<b>45%</b> [83]

**DEMOGRAPHICS**

MG age (mean)	<b>38</b> [98]
MG Female	<b>48%</b> [98]
MG Male	<b>52%</b> [104]

**ACCOMMODATION (TOP 3)**

Mid-range hotel	<b>49%</b> [104]
High-end hotel	<b>26%</b> [104]
Budget hotel	<b>20%</b> [100]

**TRANSPORT**

Flight	<b>86%</b> [116]
Own car	<b>12%</b> [57]
Train	<b>11%</b> [65]

**AREAS OF INTEREST (TOP 5)**

London	<b>77%</b> [115]
Manchester	<b>43%</b> [126]
Cambridge	<b>36%</b> [109]
Windsor	<b>30%</b> [167]
Liverpool	<b>28%</b> [90]

**ENGLAND DRIVERS (TOP 10)**

Great cultural attractions	<b>35%</b> [106]
Easy to get around	<b>34%</b> [142]
Is a safe / secure destination	<b>29%</b> [85]
They speak English	<b>29%</b> [112]
To visit friends or relatives	<b>29%</b> [193]
Offers a good mix of old and new	<b>26%</b> [100]
Its countryside and natural beauty	<b>25%</b> [64]
Has vibrant cities	<b>25%</b> [81]
Easy to plan/organise	<b>21%</b> [91]
Never been before and wanted to go	<b>21%</b> [140]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	<b>50%</b> [88]	<b>41%</b> [76]	<b>45%</b> [80]
Stand out (top 3 box)	<b>53%</b> [87]	<b>45%</b> [78]	<b>53%</b> [85]
Fit (top 3 box)	<b>52%</b> [84]	<b>54%</b> [90]	<b>56%</b> [90]

### OPPORTUNITY

MG consideration 20% [138]  
 Proportion who considered or took a MG trip in P3Y + number of MG trips + proportion of MG trips made P3Y in high-spending mode

MG HIGH spending 41% [85]

### DECISION MAKING

Size of DMs in market, proportion who made biggest contribution

MG KDMS 46% [105]  
 MG KDMS paying 64% [110]

### MG CONFIGURATION (TRIPS)

Market representative generational distribution of all multi-gen trips taken across P3Y. 2G younger refers to non-nuclear versions of 2G travel, e.g. grandparents with grandchildren

43%

### DEMOGRAPHICS

MG age (mean) 40 [100]  
 Age and gender profile of MG audience

MG Female 51% [94]  
 MG Male 49% [109]

### ACCOMODATION (TOP 3)

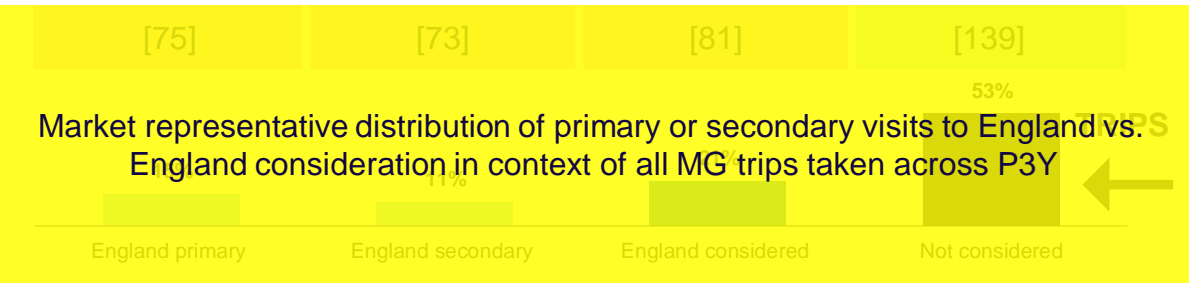
Mid-range hotel 48% [107]  
 Accommodation on deep-dive MG trip

High-end hotel 15% [79]  
 Cruise ship 15% [188]

### TRANSPORT (TOP 3)

Flight 67% [99]  
 Transport on deep-dive MG trip

Own car 24% [98]  
 Rental car 11% [100]



### COUNTRIES VISITED (TOP 5)

Countries most prominently visited based on deep-dive MG trip

USA 35%  
 The Caribbean 25%  
 Mexico 18%  
 Canada 17%  
 England 15% [58]  
 Other UK 8% [80]

### EUROPEAN COUNTRIES (TOP 5)

European countries most prominently visited based on deep-dive MG trip

England 15% [58]  
 Italy 12% [75]  
 France 10% [50]  
 Germany 8% [57]  
 Other UK 8% [80]

CONSIDERATION (TOP 5)	
Country in Americas	14%
England	12%
Italy	8%
France	9%
Canada	8%

Countries most prominently considered but not visited based on deep-dive MG trip

AREAS OF INTEREST (TOP 5)	
London	78% [110]
Cambridge	30% [91]
Other	23% [100]
Manc	23% [100]
Liverpool	31% [107]

England areas of interest among all who visited/considered or would consider England (indexed against the same group across markets)

ENGLAND DRIVERS (TOP 10)	
Great cultural attractions	52% [130]
Never been before and wanted to go	49% [175]
They speak English	47% [152]
Its countryside and natural beauty	43% [105]
Is a safe / secure destination	32% [103]
Offers a good mix of old and new	32% [119]
To sample the local food and drink	29% [145]
Its culture is different from our own	27% [123]
Has vibrant cities	24% [92]

England drivers, i.e. reasons for visiting or considering visiting England, among all in market who visited/considered or would consider visiting England indexed against the same group across markets

ACTIVITIES (TOP 5)	MEAN	ENGLAND BEST
Just relaxing	16.9 [107]	N/A
Visiting famous / iconic attractions	15.3 [95]	30% [120]
Low intensity leisure activities	11.6 [102]	34% [106]
Experiencing city life	11.3 [104]	34% [106]
Exploring history and heritage	10.5 [93]	30% [111]

Activities on MG deep-dive MG trip based on allocation of 100 points – market level scores indexed against cross-market scores

Proportion who see England as the main destination for a given activity

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	63% [107]	51% [100]	63% [113]
Stand out (top 3 box)	65% [103]	55% [98]	62% [109]
Fit (top 3 box)	65% [103]	55% [98]	66% [108]

Top 3 box scores (on 7-point scale) among all MG and MG considerers in market indexed against the same scores across markets



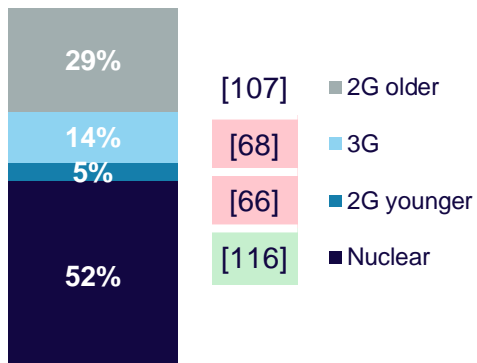
### OPPORTUNITY

MG consideration	<b>21%</b> [145]
P3Y MG	<b>17%</b> [73]
P3Y MG TRIPS	<b>3.4</b> [77]
MG HIGH spending	<b>42%</b> [88]

### DECISION MAKING

MG KDMs	<b>44%</b> [100]
MG KDMs paying	<b>66%</b> [96]

### MG CONFIGURATION (TRIPS)



### DEMOGRAPHICS

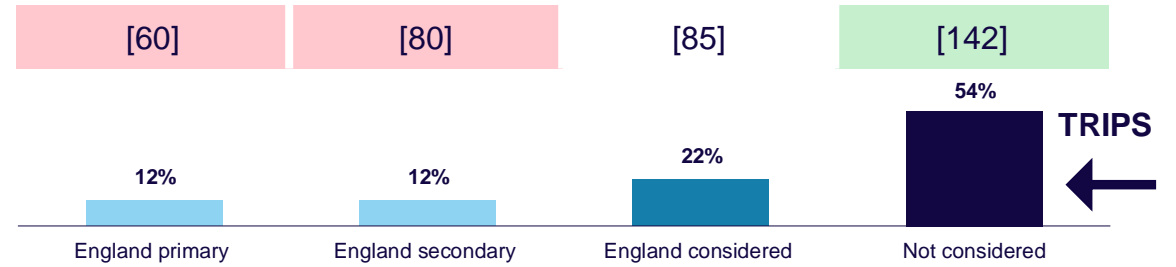
MG age (mean)	<b>39</b> [97]
MG Female	<b>55%</b> [102]
MG Male	<b>45%</b> [100]

### ACCOMODATION (TOP 3)

Mid-range hotel	<b>49%</b> [109]
High-end hotel	<b>21%</b> [111]
Budget hotel	<b>18%</b> [95]

### TRANSPORT (TOP 3)

Flight	<b>82%</b> [121]
Own car	<b>12%</b> [48]
Ferry/Cruise	<b>12%</b> [120]



### COUNTRIES VISITED (TOP 5)

Australia	<b>26%</b>
New Zealand	<b>23%</b>
Other Asia	<b>21%</b>
USA	<b>18%</b>
England	<b>15%</b> [58]
Other UK	<b>6%</b> [60]

### EUROPEAN COUNTRIES (TOP 5)

England	<b>15%</b> [58]
Italy	<b>11%</b> [69]
France	<b>11%</b> [50]
Other Europe	<b>9%</b> [64]
Spain	<b>6%</b> [35]

### MARKET SUMMARY

Not a sizeable opportunity based on category penetration and geographical location will have something to do with the relative rejection of England, although the latter is obviously strong relative to other European destinations. London, as always, appeals but so do other locations such as Stonehenge, Manchester and Windsor, which of course is capable of satisfying the appetite for famous / iconic attractions.



**CONSIDERATION (TOP 5)**

England	<b>15%</b>
Other Asia	<b>15%</b>
Other Australasia	<b>9%</b>
Other Europe	<b>7%</b>
New Zealand	<b>7%</b>

**AREAS OF INTEREST (TOP 5)**

London	<b>78%</b> [110]
Stonehenge	<b>47%</b> [168]
Manchester	<b>37%</b> [119]
Windsor	<b>35%</b> [159]
Cambridge	<b>32%</b> [97]

**ACTIVITIES (TOP 5)**

	MEAN	ENGLAND BEST
Visiting famous / iconic attractions	<b>15.5</b> [97]	<b>33%</b> [132]
Exploring history and heritage	<b>11.8</b> [104]	<b>36%</b> [133]
Experiencing city life	<b>11.8</b> [109]	<b>46%</b> [144]
Just relaxing	<b>10.1</b> [64]	<b>N/A</b>
Experiencing rural life & scenery	<b>9.8</b> [94]	<b>26%</b> [144]

**ENGLAND DRIVERS (TOP 10)**

Great cultural attractions	<b>50%</b> [125]
Its countryside and natural beauty	<b>48%</b> [117]
They speak English	<b>46%</b> [148]
Offers a wide variety of places to visit around the country	<b>37%</b> [116]
Never been before and wanted to go	<b>37%</b> [132]
Offers a good mix of old and new	<b>36%</b> [133]
Is a safe / secure destination	<b>31%</b> [100]
Easy to get around	<b>27%</b> [129]
To visit friends or relatives	<b>26%</b> [186]
Offers a wide range of holiday activities	<b>25%</b> [139]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	<b>57%</b> [97]	<b>40%</b> [78]	<b>48%</b> [86]
Stand out (top 3 box)	<b>58%</b> [95]	<b>46%</b> [84]	<b>51%</b> [89]
Fit (top 3 box)	<b>62%</b> [98]	<b>50%</b> [89]	<b>56%</b> [92]