



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)

DEMOGRAPHICS

MG age (mean) 39 [100]
 Age and gender of decision makers in market indexed against decisions makers across all markets

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]
- 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 26% [79]
- Liverpool 25% [81]

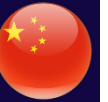
ENGLAND DRIVERS (TOP 10)

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
Appeal (top 3 box)	60% [105]	56% [104]	59% [105]
Stand out (top 3 box)	65% [105]	58% [100]	63% [105]
Fit (top 3 box)	62% [100]	56% [93]	63% [102]

Top 3 box scores (on 7-point scale) among decision makers in market indexed against decision makers across markets



OPPORTUNITY

MG KDMs	53% [120]
MG KDMs paying	81% [117]
MG HIGH spending	69% [128]

DEMOGRAPHICS

MG age (mean)	39 [100]
MG Female	53% [108]
MG Male	47% [94]

ACCOMMODATION (TOP 3)

Mid-range hotel	55% [117]
Budget hotel	35% [175]
B&B / Guest House	21% [162]

TRANSPORT

Flight	91% [123]
Train	17% [100]
Ferry/Cruise	12% [109]

AREAS OF INTEREST (TOP 5)

London	76% [113]
Cambridge	58% [176]
Oxford	52% [168]
Manchester	43% [126]
Stonehenge	38% [200]

ENGLAND DRIVERS (TOP 10)

Great cultural attractions	60% [182]
Its countryside and natural beauty	56% [144]
Is a safe / secure destination	46% [135]
Has vibrant cities	44% [142]
Offers a good mix of old and new	41% [158]
To sample the local food and drink	40% [190]
Its culture is different from our own	33% [127]
Great contemporary culture	31% [141]
I like the climate / weather	27% [113]
Offers a wide variety of places to visit around the country	26% [96]

Product	Touring route	Outdoor activity	Single destination
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Appeal (top 3 box)	601 [107]	55% [102]	60% [107]
Stand out (top 3 box)	66% [108]	66% [114]	67% [108]
Fit (top 3 box)	68% [110]	62% [103]	67% [108]

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 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]

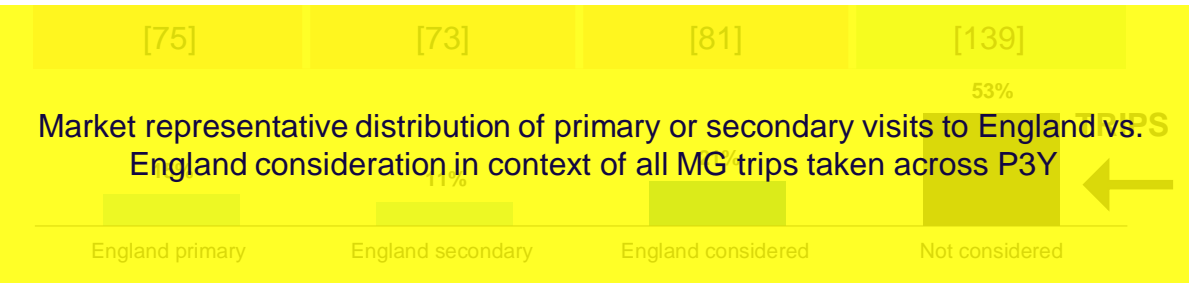
Cruise ship 15% [188]

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	8% [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

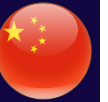
ACTIVITIES (TOP 5)	MEAN	ENGLAND BEST
Just relaxing	16.9 [107]	N/A
Visiting famous / iconic attractions	15.3 [95]	30% [120]
Low intensity leisure activities	11.6 [102]	34% [106]
Experiencing city life	11.3 [104]	34% [106]
Exploring history and heritage	10.5 [93]	30% [111]

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



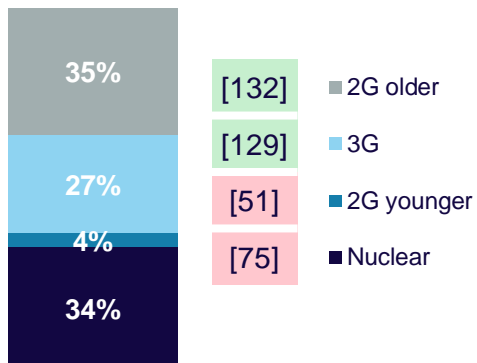
OPPORTUNITY

MG consideration	16% [111]
P3Y MG	26% [111]
P3Y MG TRIPS	4.1 [93]
MG HIGH spending	56% [117]

DECISION MAKING

MG KDMs	53% [120]
MG KDMs paying	81% [117]

MG CONFIGURATION (TRIPS)



DEMOGRAPHICS

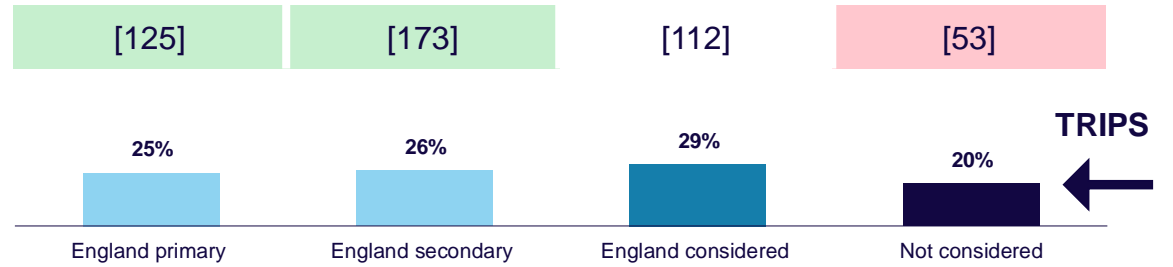
MG age (mean)	38 [94]
MG Female	54% [100]
MG Male	46% [102]

ACCOMODATION (TOP 3)

Mid-range hotel	50% [111]
Budget hotel	37% [195]
B&B / Guest House	21% [175]

TRANSPORT (TOP 3)

Flight	92% [135]
Train	15% [107]
Ferry/Cruise	12% [120]



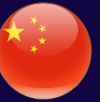
COUNTRIES VISITED (TOP 5)

Japan	40%
Thailand	35%
China	28%
England	24% [92]
France	22%
Other UK	13% [130]

EUROPEAN COUNTRIES (TOP 5)

England	24% [92]
France	22% [100]
Other UK	13% [130]
Italy	11% [69]
Germany	10% [71]

MARKET SUMMARY
 Obviously a large market, which also looks attractive due to it's relatively large proportions of MG and MG considerers. More to the point, England is strongly positioned within this market where decision making is centralized (as is paying for GM trips). Strong skew to 2G older and 3G trips. London of course important to Chinese MG tourists, but disproportionate emphasis on Oxford and Cambridge also.



CONSIDERATION (TOP 5)

England	29%
France	18%
New Zealand	17%
Italy	16%
Australia	16%

AREAS OF INTEREST (TOP 5)

London	76% [107]
Cambridge	59% [179]
Oxford	55% [172]
Manchester	34% [110]
Stonehenge	31% [111]

ENGLAND DRIVERS (TOP 10)

Great cultural attractions	54% [135]
Its countryside and natural beauty	47% [115]
To sample the local food and drink	39% [195]
Is a safe / secure destination	35% [113]
Its culture is different from our own	35% [159]
Offers a good mix of old and new	34% [126]
Has vibrant cities	34% [131]
Great contemporary culture	30% [158]
Offers a wide variety of places to visit around the country	29% [91]
Never been before and wanted to go	24% [86]

ACTIVITIES (TOP 5)

	MEAN	ENGLAND BEST
Visiting famous / iconic attractions	20.6 [129]	21% [84]
Exploring history and heritage	13.1 [116]	20% [74]
Experiencing city life	12.3 [113]	23% [72]
Experiencing rural life & scenery	11.1 [107]	22% [122]
Low intensity leisure activities	10.6 [93]	N/A

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	66% [112]	61% [120]	59% [105]
Stand out (top 3 box)	71% [116]	67% [122]	64% [112]
Fit (top 3 box)	71% [113]	66% [118]	66% [108]