



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]
- 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
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]

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



**OPPORTUNITY**

MG KDMs	<b>43%</b> [98]
MG KDMs paying	<b>74%</b> [107]
MG HIGH spending	<b>43%</b> [80]

**DEMOGRAPHICS**

MG age (mean)	<b>43</b> [110]
MG Female	<b>44%</b> [90]
MG Male	<b>56%</b> [112]

**ACCOMMODATION (TOP 3)**

Mid-range hotel	<b>45%</b> [96]
Rented incl. Airbnb	<b>19%</b> [119]
High-end hotel	<b>15%</b> [60]

**TRANSPORT**

Flight	<b>55%</b> [74]
Own car	<b>33%</b> [157]
Train	<b>13%</b> [76]

**AREAS OF INTEREST (TOP 5)**

London	<b>72%</b> [107]
Oxford	<b>22%</b> [71]
Manchester	<b>19%</b> [56]
Cambridge	<b>18%</b> [55]
Windsor	<b>17%</b> [94]

**ENGLAND DRIVERS (TOP 10)**

Is easy to get to	<b>28%</b> [108]
They speak English	<b>28%</b> [108]
Has vibrant cities	<b>26%</b> [84]
Easy to plan/organise	<b>25%</b> [109]
Its culture is different from our own	<b>23%</b> [88]
Easy to get around	<b>22%</b> [92]
Great cultural attractions	<b>21%</b> [64]
Offers a wide variety of places to visit around the country	<b>21%</b> [78]
Its countryside and natural beauty	<b>20%</b> [51]
Easy to visit with children	<b>18%</b> [81]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	<b>49%</b> [86]	<b>47%</b> [87]	<b>47%</b> [84]
Stand out (top 3 box)	<b>52%</b> [85]	<b>43%</b> [74]	<b>50%</b> [81]
Fit (top 3 box)	<b>52%</b> [84]	<b>52%</b> [87]	<b>52%</b> [84]

### 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]

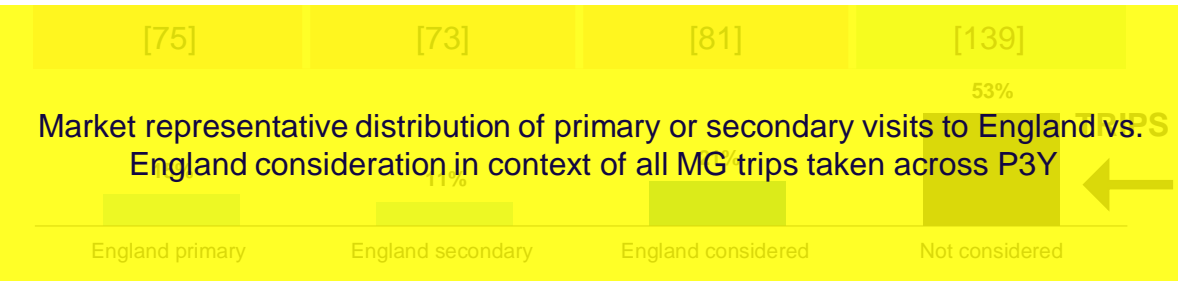
Cruise ship 15% [188]

### TRANSPORT (TOP 3)

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

Own car 24% [98]

Rental car 11% [100]



### COUNTRIES VISITED (TOP 5)

USA 35%

The Caribbean 25%

Mexico 18%

Canada 17%

England 15% [58]

Other UK 8% [80]

### EUROPEAN COUNTRIES (TOP 5)

England 15% [58]  
 European countries most prominently visited based on deep-dive MG trip

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



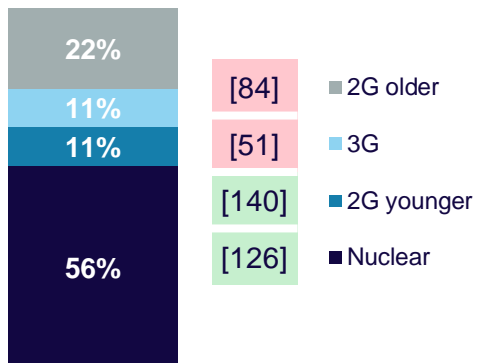
### OPPORTUNITY

MG consideration	<b>13%</b> [90]
P3Y MG	<b>29%</b> [124]
P3Y MG TRIPS	<b>4.6</b> [103]
MG HIGH spending	<b>39%</b> [81]

### DECISION MAKING

MG KDMs	<b>43%</b> [98]
MG KDMs paying	<b>74%</b> [107]

### MG CONFIGURATION (TRIPS)



### DEMOGRAPHICS

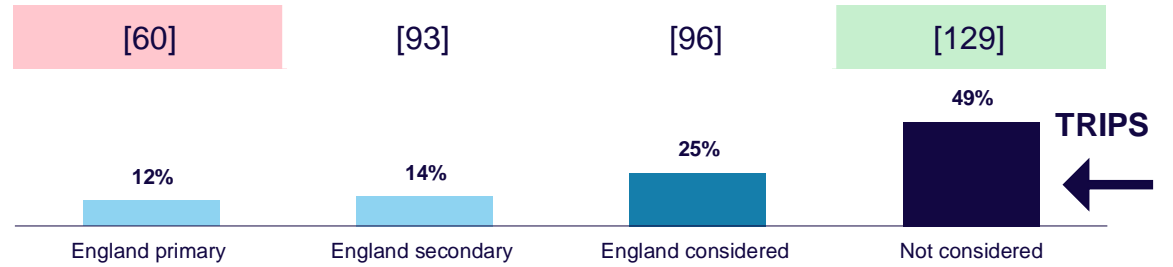
MG age (mean)	<b>43</b> [108]
MG Female	<b>53%</b> [98]
MG Male	<b>47%</b> [104]

### ACCOMODATION (TOP 3)

Mid-range hotel	<b>42%</b> [93]
Rented incl. AirBnb	<b>27%</b> [135]
High-end hotel	<b>14%</b> [74]

### TRANSPORT (TOP 3)

Flight	<b>47%</b> [69]
Own car	<b>40%</b> [160]
Train	<b>13%</b> [93]



### COUNTRIES VISITED (TOP 5)

France	<b>50%</b>
Spain	<b>38%</b>
Italy	<b>27%</b>
Other Europe	<b>22%</b>
England	<b>19%</b> [73]
Other UK	<b>7%</b> [70]

### EUROPEAN COUNTRIES (TOP 5)

France	<b>50%</b> [227]
Spain	<b>38%</b> [224]
Italy	<b>27%</b> [169]
Other Europe	<b>22%</b> [157]
England	<b>19%</b> [73]

### MARKET SUMMARY

Very high penetration of P3Y MG in this market, but England not in a position of strength in terms of being chosen as the destination or being considered. Majority of MG trips centre on a nuclear setup, but 2G younger also prevalent. History and heritage looks to be important to this MG audience, but England's strength overshadowed by that of other destinations. Convenience the most obvious way to attract consumers in the French MG category.



**CONSIDERATION (TOP 5)**

England	<b>21%</b>
Other Europe	<b>20%</b>
Italy	<b>12%</b>
Spain	<b>9%</b>
France	<b>8%</b>

**AREAS OF INTEREST (TOP 5)**

London	<b>81%</b> [114]
Cambridge	<b>22%</b> [67]
Oxford	<b>22%</b> [69]
Windsor	<b>20%</b> [91]
Manchester	<b>19%</b> [61]

**ENGLAND DRIVERS (TOP 10)**

Is easy to get to	<b>45%</b> [180]
Great cultural attractions	<b>28%</b> [70]
Offers a wide variety of places to visit around the country	<b>28%</b> [88]
Easy to plan/organise	<b>26%</b> [118]
Its culture is different from our own	<b>25%</b> [114]
They speak English	<b>24%</b> [77]
Easy to get around	<b>24%</b> [114]
Its countryside and natural beauty	<b>22%</b> [54]
Has vibrant cities	<b>22%</b> [85]
Affordable cost of getting there	<b>21%</b> [131]

**ACTIVITIES (TOP 5)**

	<b>MEAN</b>	<b>ENGLAND BEST</b>
Visiting famous / iconic attractions	<b>18.3</b> [114]	<b>16%</b> [64]
Just relaxing	<b>17.5</b> [111]	<b>N/A</b>
Exploring history and heritage	<b>13.8</b> [122]	<b>13%</b> [48]
Low intensity leisure activities	<b>10.7</b> [94]	<b>N/A</b>
Experiencing city life	<b>9.6</b> [88]	<b>30%</b> [94]

<b>Product</b>	<b>Touring route</b>	<b>Outdoor activity</b>	<b>Single destination</b>
Appeal (top 3 box)	<b>55%</b> [93]	<b>45%</b> [88]	<b>54%</b> [96]
Stand out (top 3 box)	<b>55%</b> [90]	<b>46%</b> [84]	<b>52%</b> [91]
Fit (top 3 box)	<b>56%</b> [89]	<b>50%</b> [89]	<b>58%</b> [95]