



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

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) 62% [100] 56% [100] 63% [105]
- Fit (top 3 box) 62% [100] 56% [93] 63% [102]



OPPORTUNITY

MG KDMs	28% [64]
MG KDMs paying	74% [107]
MG HIGH spending	44% [81]

DEMOGRAPHICS

MG age (mean)	41 [105]
MG Female	51% [104]
MG Male	49% [98]

ACCOMMODATION (TOP 3)

Mid-range hotel	49% [104]
Rented incl. Airbnb	28% [175]
High-end hotel	15% [60]

TRANSPORT

Flight	58% [78]
Own car	37% [176]
Train	15% [88]

AREAS OF INTEREST (TOP 5)

London	72% [107]
Manchester	24% [71]
Stonehenge	24% [126]
Newcastle	23% [153]
Liverpool	22% [71]

ENGLAND DRIVERS (TOP 10)

Its countryside and natural beauty	37% [95]
Has vibrant cities	34% [110]
Is a safe / secure destination	32% [94]
Offers a good mix of old and new	27% [104]
Great cultural attractions	26% [79]
Is easy to get to	25% [96]
They speak English	23% [88]
Great contemporary culture	23% [105]
Easy to plan/organise	19% [83]
Offers a wide variety of places to visit around the country	19% [70]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	54% [95]	52% [96]	51% [91]
Stand out (top 3 box)	51% [84]	47% [81]	48% [77]
Fit (top 3 box)	59% [95]	52% [87]	53% [85]

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)

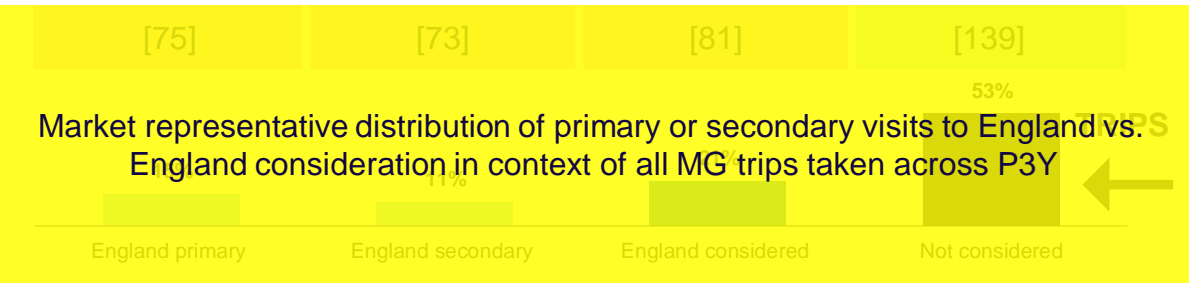
Mid-range hotel 48% [107]
 Accommodation on deep-dive MG trip

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



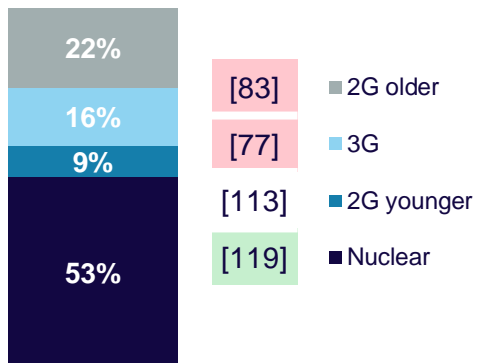
OPPORTUNITY

MG consideration	16% [111]
P3Y MG	25% [107]
P3Y MG TRIPS	5.0 [112]
MG HIGH spending	46% [96]

DECISION MAKING

MG KDMs	28% [64]
MG KDMs paying	74% [107]

MG CONFIGURATION (TRIPS)



DEMOGRAPHICS

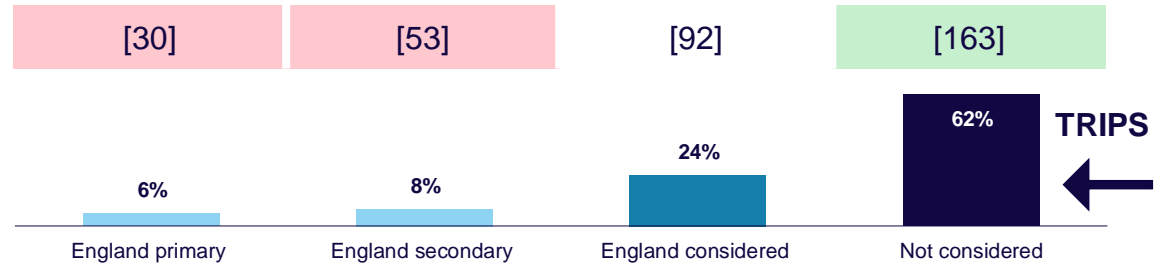
MG age (mean)	44 [111]
MG Female	57% [106]
MG Male	42% [93]

ACCOMODATION (TOP 3)

Mid-range hotel	46% [102]
Rented incl. AirBnb	33% [165]
High-end hotel	9% [47]

TRANSPORT (TOP 3)

Flight	50% [74]
Own car	46% [184]
Train	10% [71]



COUNTRIES VISITED (TOP 5)

Germany	39%
Other Europe	35%
Spain	26%
Italy	24%
France	17%
England	10% [38]
Other UK	4% [40]

EUROPEAN COUNTRIES (TOP 5)

Germany	39% [279]
Other Europe	35% [250]
Spain	26% [153]
Italy	24% [150]
France	17% [77]

MARKET SUMMARY
 Slightly above average penetration of P3Y MG in this market, but in the case of a large proportion of trips – a large proportion of which based on a nuclear setup – England is not considered. Convenience and England’s mix of old and new (in location terms London and Stonehenge) look to represent potential for drawing category active consumers in.



CONSIDERATION (TOP 5)

Other Europe	32%
England	20%
Italy	13%
Germany	11%
Spain	10%

AREAS OF INTEREST (TOP 5)

London	76% [107]
Stonehenge	38% [136]
Liverpool	27% [93]
Cambridge	25% [76]
Windsor	24% [109]

ENGLAND DRIVERS (TOP 10)

Its countryside and natural beauty	46% [112]
Great cultural attractions	38% [95]
Offers a wide variety of places to visit around the country	34% [106]
Is a safe / secure destination	31% [100]
Never been before and wanted to go	31% [111]
Offers a good mix of old and new	31% [115]
Is easy to get to	30% [120]
They speak English	30% [97]
Has vibrant cities	27% [104]
Easy to plan/organise	22% [100]

ACTIVITIES (TOP 5)

	MEAN	ENGLAND BEST
Just relaxing	19.2 [122]	N/A
Visiting famous / iconic attractions	16.1 [100]	22% [88]
Exploring history and heritage	10.7 [95]	19% [70]
Experiencing city life	10.7 [99]	27% [84]
Low intensity leisure activities	10.6 [93]	N/A

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	57% [97]	49% [96]	50% [89]
Stand out (top 3 box)	51% [84]	45% [82]	45% [79]
Fit (top 3 box)	61% [97]	50% [89]	54% [89]