



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)
Age and gender of decision makers in market indexed against decisions makers across all markets

MG Male

ACCOMODATION (TOP 3)

Accommodation on MG trip among decisions makers in market indexed against decision makers across markets

TRANSPORT

Transport on MG trip among decisions makers in market indexed against decision makers across markets

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

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

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	56% [127]
MG KDMs paying	63% [91]
MG HIGH spending	68% [126]

DEMOGRAPHICS

MG age (mean)	38 [98]
MG Female	54% [110]
MG Male	46% [92]

ACCOMMODATION (TOP 3)

Mid-range hotel	47% [100]
High-end hotel	40% [160]
Budget hotel	28% [140]

TRANSPORT

Flight	91% [123]
Rental car	28% [233]
Train	26% [153]

AREAS OF INTEREST (TOP 5)

London	80% [110]
Manchester	47% [135]
Oxford	45% [110]
Cambridge	44% [76]
Liverpool	44% [187]

ENGLAND DRIVERS (TOP 10)

Is a safe / secure destination	45% [132]
Its countryside and natural beauty	44% [113]
Has vibrant cities	39% [126]
I like the climate / weather	38% [158]
Offers a wide variety of places to visit around the country	37% [137]
Its culture is different from our own	35% [135]
Great cultural attractions	34% [103]
Great contemporary culture	34% [155]
Offers a wide range of holiday activities	31% [135]
Easy to get around	30% [125]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	71% [125]	69% [128]	68% [121]
Stand out (top 3 box)	78% [128]	75% [129]	77% [124]
Fit (top 3 box)	77% [124]	74% [123]	76% [123]

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)

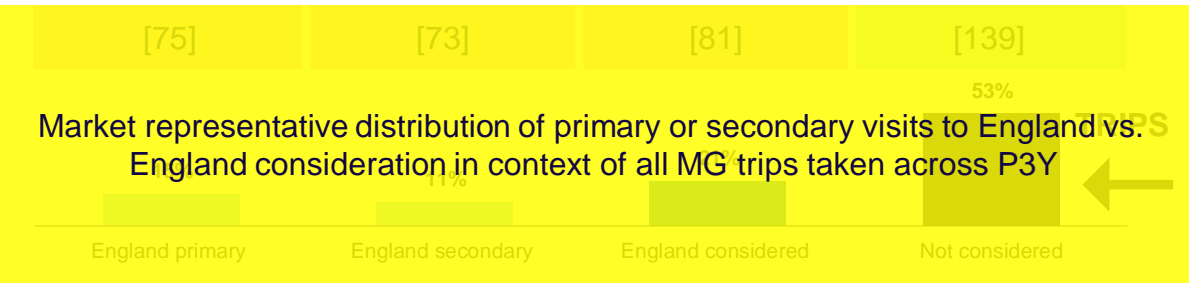
Mid-range hotel 48% [107]
 Accommodation on deep-dive MG trip

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



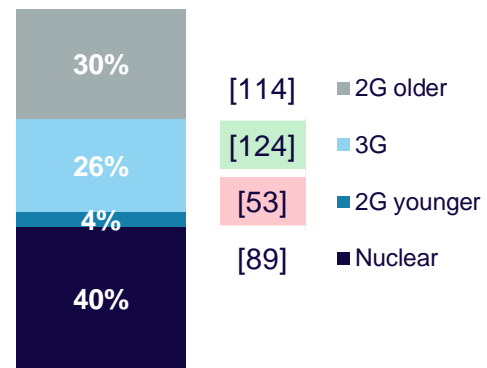
OPPORTUNITY

MG consideration	9% [62]
P3Y MG	24% [102]
P3Y MG TRIPS	4.8 [107]
MG HIGH spending	61% [127]

DECISION MAKING

MG KDMs	56% [127]
MG KDMs paying	63% [91]

MG CONFIGURATION (TRIPS)



DEMOGRAPHICS

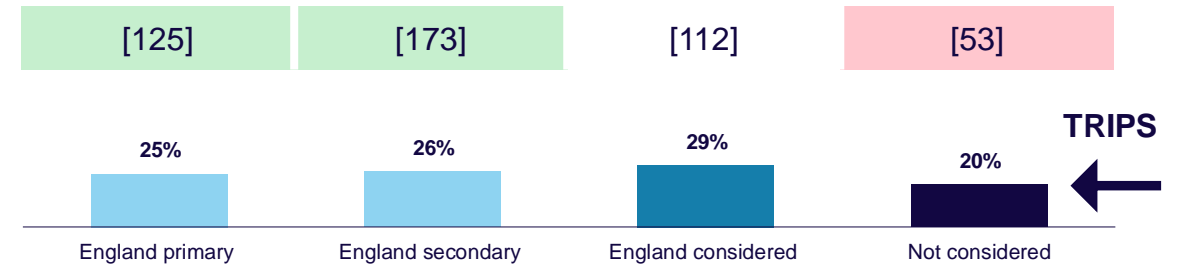
MG age (mean)	38 [95]
MG Female	57% [106]
MG Male	43% [96]

ACCOMODATION (TOP 3)

Mid-range hotel	48% [107]
High-end hotel	31% [163]
Budget hotel	31% [163]

TRANSPORT (TOP 3)

Flight	88% [129]
Rental car	27% [245]
Train	25% [179]



COUNTRIES VISITED (TOP 5)

England	37% [142]
India	27%
Australia	25%
Thailand	23%
France	23%
Other UK	8% [80]

EUROPEAN COUNTRIES (TOP 5)

England	37% [142]
France	23% [105]
Germany	20% [143]
Italy	17% [106]
Spain	15% [88]

MARKET SUMMARY
 A large market with an averagely sized penetration of mostly high spending MG tourists, who are relatively likely to travel in a 3G configuration. England in a position of considerable strength here and it is London as well as locations outside of the capital that appeal (vibrancy of cities an important driver).



CONSIDERATION (TOP 5)

England	22%
Other Asia	14%
France	12%
USA	10%
Australia	10%

AREAS OF INTEREST (TOP 5)

London	79% [111]
Oxford	50% [156]
Cambridge	48% [145]
Manchester	46% [148]
Liverpool	40% [138]

ACTIVITIES (TOP 5)

	MEAN	ENGLAND BEST
Visiting famous / iconic attractions	15.1 [94]	28% [112]
Just relaxing	12.6 [80]	N/A
Experiencing city life	11.2 [104]	36% [113]
Low intensity leisure activities	10.9 [96]	N/A
Exploring history and heritage	10.8 [95]	32% [119]

ENGLAND DRIVERS (TOP 10)

Is a safe / secure destination	41% [132]
Its countryside and natural beauty	40% [98]
I like the climate / weather	37% [206]
Great cultural attractions	36% [90]
Offers a wide variety of places to visit around the country	33% [103]
Has vibrant cities	31% [119]
Its culture is different from our own	30% [136]
Never been before and wanted to go	29% [104]
Great contemporary culture	28% [147]
Offers a wide range of holiday activities	27% [150]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	66% [112]	61% [120]	63% [113]
Stand out (top 3 box)	72% [118]	65% [118]	68% [119]
Fit (top 3 box)	71% [113]	65% [116]	67% [110]