



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	39% [89]
MG KDMs paying	56% [81]
MG HIGH spending	48% [89]

DEMOGRAPHICS

MG age (mean)	33 [86]
MG Female	51% [104]
MG Male	46% [92]

ACCOMMODATION (TOP 3)

Mid-range hotel	46% [98]
High-end hotel	30% [120]
Budget hotel	23% [115]

TRANSPORT

Flight	87% [118]
Train	20% [118]
Ferry/Cruise	15% [136]

AREAS OF INTEREST (TOP 5)

London	70% [104]
Manchester	41% [121]
Birmingham	39% [170]
Liverpool	38% [123]
Cambridge	36% [109]

ENGLAND DRIVERS (TOP 10)

Its countryside and natural beauty	48% [123]
They speak English	44% [169]
I like the climate / weather	41% [171]
Never been before and wanted to go	33% [220]
Offers a wide variety of places to visit around the country	31% [115]
Its culture is different from our own	31% [119]
Easy to get around	31% [129]
Is a safe / secure destination	30% [88]
To sample the local food and drink	30% [143]
Great contemporary culture	28% [127]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	64% [112]	58% [107]	63% [113]
Stand out (top 3 box)	66% [108]	62% [107]	64% [103]
Fit (top 3 box)	63% [102]	68% [113]	62% [100]

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)

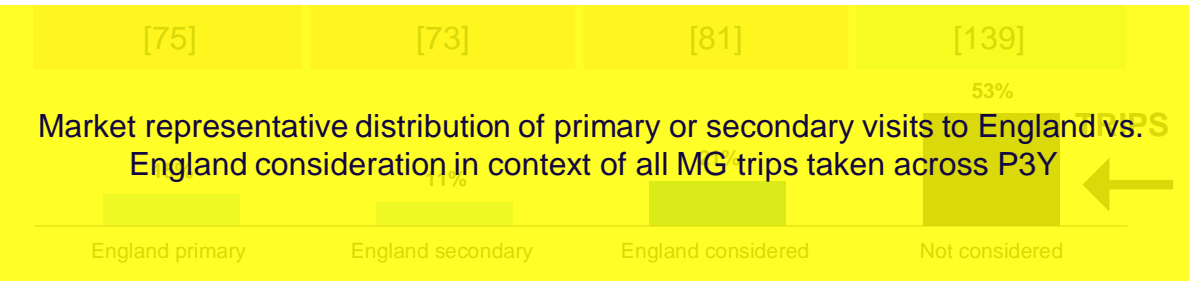
Mid-range hotel 48% [107]
 Accommodation on deep-dive MG trip

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



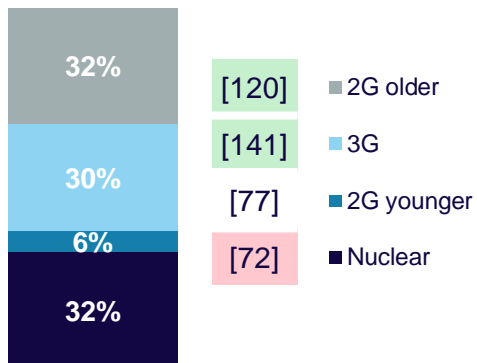
OPPORTUNITY

MG consideration	15% [104]
P3Y MG	25% [107]
P3Y MG TRIPS	5.0 [112]
MG HIGH spending	45% [94]

DECISION MAKING

MG KDMs	39% [89]
MG KDMs paying	56% [81]

MG CONFIGURATION (TRIPS)



DEMOGRAPHICS

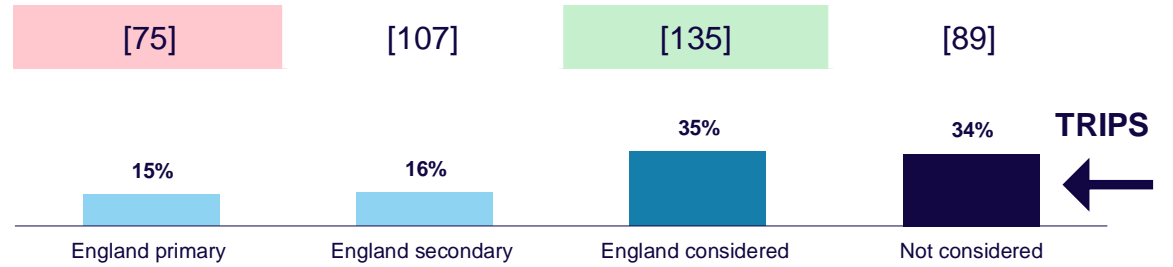
MG age (mean)	33 [84]
MG Female	57% [106]
MG Male	42% [93]

ACCOMODATION (TOP 3)

Mid-range hotel	46% [102]
Budget hotel	24% [126]
High-end hotel	21% [111]

TRANSPORT (TOP 3)

Flight	85% [125]
Train	16% [114]
Rental car	14% [127]



COUNTRIES VISITED (TOP 5)

Other Asia	38%
Thailand	24%
India	21%
England	19% [73]
Other Europe	15%
Other UK	7% [70]

EUROPEAN COUNTRIES (TOP 5)

England	19% [73]
Other Europe	15% [107]
Italy	14% [88]
France	13% [59]
Spain	12% [71]

MARKET SUMMARY

Slightly above average penetration of MG with a relatively strong England performance in terms of consideration if not actual visits. Strong skews towards 2G older and 3G configurations and considerable appeal associated with other cities than London (which of course is also quite a draw). Culture, whilst not necessarily the most important driver, does look to be a disproportionately important factor here.



CONSIDERATION (TOP 5)

England	27%
Other Asia	27%
France	11%
Other Europe	11%
Italy	10%

AREAS OF INTEREST (TOP 5)

London	74% [104]
Manchester	45% [145]
Liverpool	37% [128]
Birmingham	36% [164]
Cambridge	32% [97]

ACTIVITIES (TOP 5)

	MEAN	ENGLAND BEST
Visiting famous / iconic attractions	15.1 [94]	20% [80]
Just relaxing	12.6 [80]	N/A
Experiencing city life	11.2 [104]	31% [97]
Low intensity leisure activities	10.9 [96]	N/A
Exploring history and heritage	10.8 [95]	24% [89]

ENGLAND DRIVERS (TOP 10)

Never been before and wanted to go	39% [139]
Its countryside and natural beauty	36% [88]
Great cultural attractions	36% [90]
I like the climate / weather	34% [189]
Offers a wide variety of places to visit around the country	31% [97]
They speak English	29% [94]
Its culture is different from our own	27% [123]
Is a safe / secure destination	25% [81]
Has vibrant cities	25% [96]
Great contemporary culture	24% [126]

Product	Touring route	Outdoor activity	Single destination
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Stand out (top 3 box)	69% [113]	65% [118]	68% [119]
Fit (top 3 box)	66% [105]	65% [116]	65% [107]