



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	<b>45%</b> [102]
MG KDMs paying	<b>70%</b> [101]
MG HIGH spending	<b>50%</b> [93]

**DEMOGRAPHICS**

MG age (mean)	<b>33</b> [85]
MG Female	<b>33%</b> [67]
MG Male	<b>60%</b> [120]

**ACCOMMODATION (TOP 3)**

Mid-range hotel	<b>44%</b> [94]
High-end hotel	<b>43%</b> [172]
Budget hotel	<b>15%</b> [75]

**TRANSPORT**

Flight	<b>78%</b> [105]
Own car	<b>16%</b> [76]
Train	<b>14%</b> [82]

**AREAS OF INTEREST (TOP 5)**

London	<b>74%</b> [110]
Liverpool	<b>58%</b> [187]
Manchester	<b>46%</b> [135]
Oxford	<b>34%</b> [110]
Cambridge	<b>25%</b> [76]

**ENGLAND DRIVERS (TOP 10)**

Its culture is different from our own	<b>46%</b> [177]
Its countryside and natural beauty	<b>43%</b> [110]
They speak English	<b>41%</b> [158]
Offers a wide variety of places to visit around the country	<b>41%</b> [152]
Has vibrant cities	<b>38%</b> [123]
Offers a good mix of old and new	<b>36%</b> [138]
I like the climate / weather	<b>34%</b> [142]
Never been before and wanted to go	<b>32%</b> [213]
Great cultural attractions	<b>32%</b> [97]
Offers a wide range of holiday activities	<b>32%</b> [139]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	<b>66%</b> [116]	<b>68%</b> [126]	<b>67%</b> [120]
Stand out (top 3 box)	<b>72%</b> [118]	<b>75%</b> [129]	<b>73%</b> [118]
Fit (top 3 box)	<b>67%</b> [108]	<b>70%</b> [117]	<b>72%</b> [116]

### 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)

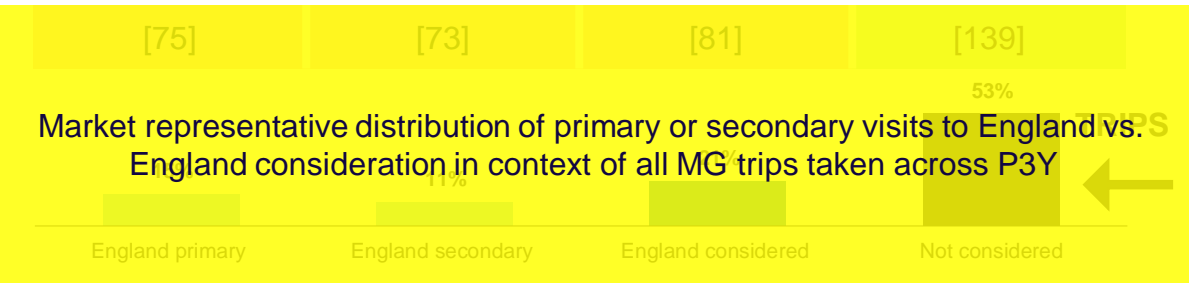
Mid-range hotel 48% [107]  
 Accommodation on deep-dive MG trip

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

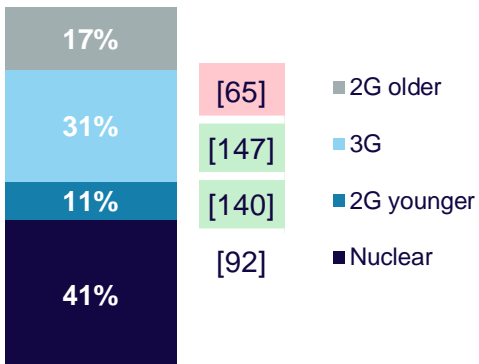
### OPPORTUNITY

MG consideration	<b>8%</b> [55]
P3Y MG	<b>20%</b> [85]
P3Y MG TRIPS	<b>5.1</b> [114]
MG HIGH spending	<b>47%</b> [98]

### DECISION MAKING

MG KDMs	<b>45%</b> [102]
MG KDMs paying	<b>70%</b> [101]

### MG CONFIGURATION (TRIPS)



### DEMOGRAPHICS

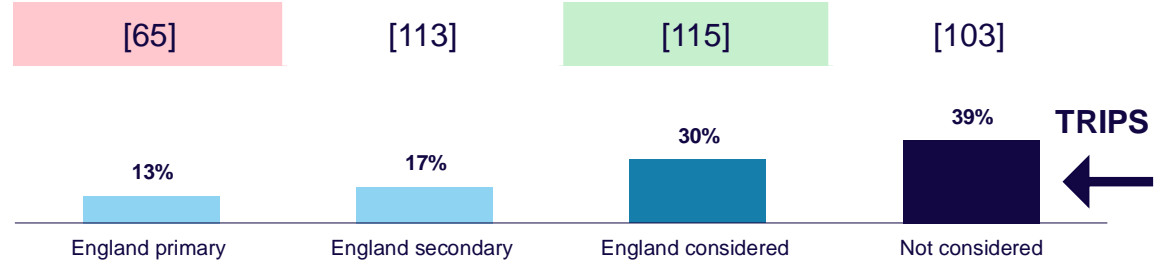
MG age (mean)	<b>34</b> [85]
MG Female	<b>33%</b> [61]
MG Male	<b>60%</b> [133]

### ACCOMODATION (TOP 3)

Mid-range hotel	<b>50%</b> [111]
High-end hotel	<b>34%</b> [179]
Budget hotel	<b>17%</b> [89]

### TRANSPORT (TOP 3)

Flight	<b>80%</b> [118]
Own car	<b>15%</b> [60]
Ferry/Cruise	<b>12%</b> [120]



### COUNTRIES VISITED (TOP 5)

Other Asia	<b>32%</b>
France	<b>27%</b>
England	<b>19%</b> [73]
Thailand	<b>16%</b>
Italy	<b>16%</b>
Other UK	<b>5%</b> [50]

### EUROPEAN COUNTRIES (TOP 5)

France	<b>27%</b> [123]
England	<b>19%</b> [73]
Italy	<b>16%</b> [100]
Spain	<b>12%</b> [71]
Germany	<b>12%</b> [86]

### MARKET SUMMARY

Below average MG penetration in this market, with MG consideration also low. In the P3Y perspective, England does get considered and sometimes visited as a secondary destination, but there is work to do to drive up England as a primary destination. Initial clues point to Liverpool and Manchester as being disproportionately important corresponding with the importance of the vibrancy of cities and culture more broadly.



**CONSIDERATION (TOP 5)**

England	<b>20%</b>
Other Asia	<b>17%</b>
Italy	<b>14%</b>
France	<b>10%</b>
Spain	<b>9%</b>

**AREAS OF INTEREST (TOP 5)**

London	<b>65%</b> [92]
Liverpool	<b>44%</b> [152]
Manchester	<b>43%</b> [139]
Oxford	<b>28%</b> [88]
Cambridge	<b>25%</b> [76]

**ENGLAND DRIVERS (TOP 10)**

Its countryside and natural beauty	<b>43%</b> [105]
They speak English	<b>41%</b> [132]
Has vibrant cities	<b>36%</b> [138]
Never been before and wanted to go	<b>34%</b> [121]
Great cultural attractions	<b>34%</b> [85]
I like the climate / weather	<b>29%</b> [161]
Is a safe / secure destination	<b>29%</b> [94]
Offers a wide variety of places to visit around the country	<b>28%</b> [88]
Its culture is different from our own	<b>28%</b> [127]
Offers a good mix of old and new	<b>26%</b> [96]

**ACTIVITIES (TOP 5)**

	<b>MEAN</b>	<b>ENGLAND BEST</b>
Visiting famous / iconic attractions	<b>15.5</b> [96]	<b>17%</b> [68]
Low intensity leisure activities	<b>12.0</b> [105]	<b>N/A</b>
Just relaxing	<b>11.6</b> [74]	<b>N/A</b>
Experiencing rural life & scenery	<b>11.4</b> [102]	<b>18%</b> [100]
Exploring history and heritage	<b>10.8</b> [95]	<b>21%</b> [78]

<b>Product</b>	<b>Touring route</b>	<b>Outdoor activity</b>	<b>Single destination</b>
Appeal (top 3 box)	<b>66%</b> [112]	<b>67%</b> [131]	<b>64%</b> [114]
Stand out (top 3 box)	<b>65%</b> [107]	<b>68%</b> [124]	<b>65%</b> [114]
Fit (top 3 box)	<b>66%</b> [105]	<b>66%</b> [118]	<b>65%</b> [107]