



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	41% [93]
MG KDMs paying	63% [91]
MG HIGH spending	43% [80]

DEMOGRAPHICS

MG age (mean)	41 [106]
MG Female	51% [104]
MG Male	49% [98]

ACCOMMODATION (TOP 3)

Mid-range hotel	39% [83]
Rented incl. Airbnb	20% [125]
High-end hotel	15% [60]

TRANSPORT

Flight	44% [59]
Own car	42% [200]
Train	16% [94]

AREAS OF INTEREST (TOP 5)

Devon & Cornwall	32% [229]
London	30% [45]
The Lake District	29% [161]
York & Leeds	17% [142]
Liverpool	15% [48]

ENGLAND DRIVERS (TOP 10)

Is easy to get to	38% [146]
Easy to get around	35% [146]
Its countryside and natural beauty	34% [87]
Easy to plan/organise	30% [130]
Is a safe / secure destination	28% [82]
Easy to visit with children	28% [127]
Affordable cost of staying there	26% [153]
Affordable cost of getting there	25% [147]
They speak English	23% [88]
To visit friends or relatives	22% [147]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	40% [70]	37% [69]	44% [79]
Stand out (top 3 box)	47% [77]	46% [79]	51% [82]
Fit (top 3 box)	47% [76]	47% [78]	48% [77]

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)

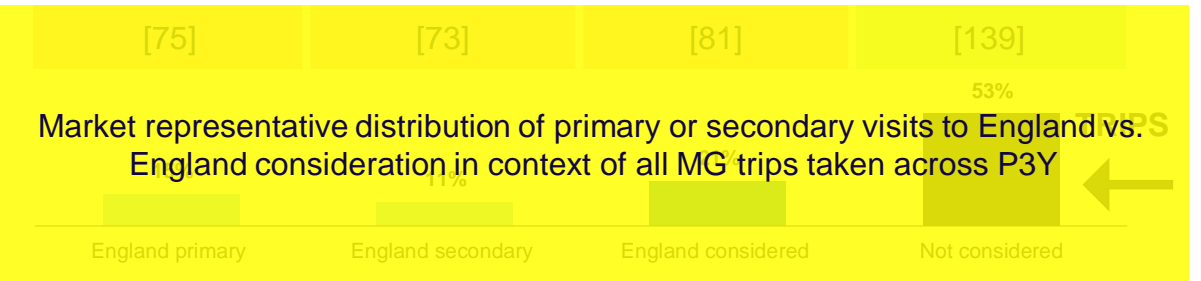
Mid-range hotel 48% [107]
 Accommodation on deep-dive MG trip

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



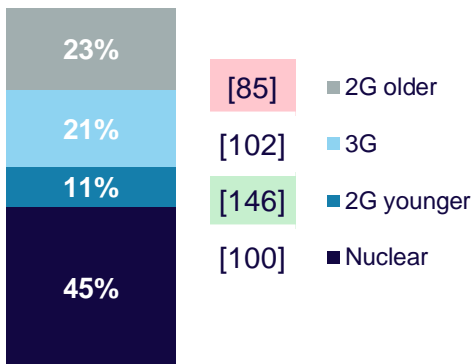
OPPORTUNITY

MG consideration	12% [83]
P3Y MG	30% [128]
P3Y MG TRIPS	4.8 [109]
MG HIGH spending	42% [88]

DECISION MAKING

MG KDMs	41% [93]
MG KDMs paying	63% [91]

MG CONFIGURATION (TRIPS)



DEMOGRAPHICS

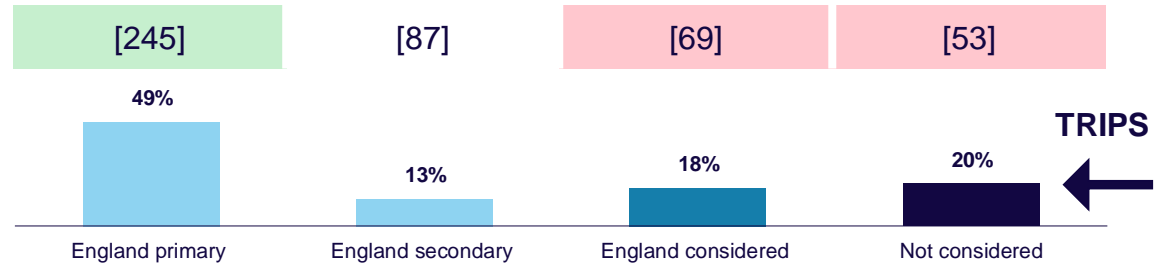
MG age (mean)	44 [110]
MG Female	59% [109]
MG Male	41% [91]

ACCOMODATION (TOP 3)

Mid-range hotel	35% [78]
Rented incl. AirBnb	24% [120]
Budget hotel	15% [79]

TRANSPORT (TOP 3)

Own car	48% [192]
Flight	38% [56]
Train	13% [93]



COUNTRIES VISITED (TOP 5)

England	57% [219]
Other UK	27% [270]
Spain	24%
Other Europe	16%
France	13%

EUROPEAN COUNTRIES (TOP 5)

England	57% [219]
Other UK	27% [270]
Spain	24%
Other Europe	16%
France	13%

MARKET SUMMARY

Large MG audience in the UK where England unsurprisingly performed much more strongly. Whilst the majority of trips involve a nuclear MG configuration, 2G younger is disproportionately prevalent in this market where accommodation and transport preferences of course stand out. Convenience very much a key reason for selecting England and interest tends to be focused on locations beyond London.



CONSIDERATION (TOP 5)

Other Europe	19%
England	13%
Other UK	9%
Spain	7%
France	6%

AREAS OF INTEREST (TOP 5)

The Lake District	44% [220]
Devon & Cornwall	43% [253]
London	35% [49]
The Cotswolds	27% [225]
York & Leeds	23% [177]

ACTIVITIES (TOP 5)

	MEAN	ENGLAND BEST
Just relaxing	22.9 [145]	N/A
Visiting famous / iconic attractions	13.6 [85]	32% [128]
Low intensity leisure activities	11.7 [103]	N/A
Experiencing city life	11.0 [105]	35% [109]
Exploring history and heritage	10.8 [96]	41% [152]

ENGLAND DRIVERS (TOP 10)

Is easy to get to	51% [204]
Easy to plan/organise	43% [195]
Its countryside and natural beauty	42% [102]
Easy to get around	42% [200]
Affordable cost of getting there	34% [213]
Easy to visit with children	31% [182]
Affordable cost of staying there	31% [238]
Is a safe / secure destination	30% [97]
Offers a wide variety of places to visit around the country	25% [78]
They speak English	24% [77]

Product	Touring route	Outdoor activity	Single destination
Appeal (top 3 box)	43% [73]	39% [76]	47% [84]
Stand out (top 3 box)	49% [80]	48% [87]	49% [86]
Fit (top 3 box)	49% [78]	50% [89]	54% [89]