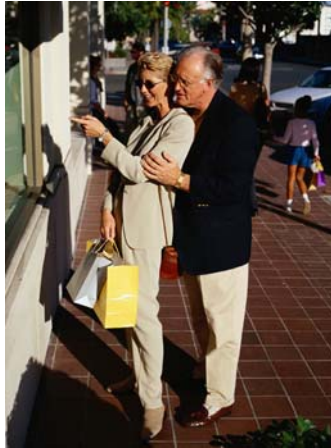


UK Target Markets

WARM 1: Affluent Southern Explorers



Affluent Southern Explorers spend the most nights away on holiday. Whilst they are affluent high achievers, they are not overly materialistic, and prefer simpler, local accommodation such as B&Bs and self-catering. They tend to take longer breaks, both in the UK and abroad, and are particularly seeking to broaden their mind and to mix with the locals – they like to engage with, and understand, the culture of places they visit. They enjoy discovering new places as well as returning to familiar places, and are always open to suggestions from articles in newspapers and from reading guide books. Even though they are geographically distant from Scotland, they have a strong connection with the destination – perhaps originally through family or friends, but it goes beyond this: Scotland fulfils their emotional and practical needs, as it helps them get off the beaten track, they enjoy the outdoors, and they love the things that Scotland has to offer on a break. They consider Scotland as a main holiday destination, not just for short breaks.

Profile

- 2.3 million households in UK
- Southern based (39% London)
- Most affluent segment
- 4th oldest segment (average age 49)
- Professionals
- Financially savvy
- Enjoy finer things in life
- Have a relationship with Scotland (through university, friends/family)

Holiday Behaviour

- Highest number of holiday nights per year
- 3rd highest total holiday spend
- UK & Scotland positive
- High Scotland share of spend
- High usage of B&Bs & self catering
- 84% visited Scotland in last 2 years
- Take long breaks
- Like to broaden mind on holiday
- Holidays off the beaten track
- Like outdoor activities/golf