



# IDENTIFICATION OF MARKET POTENTIAL

Report on the survey about travel habits,  
Slovenia's position and segmentation of tourists

GERMANY

December 2017



## Contracting Authority

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**Name:** Slovenian Tourist Board

**Address:** Dimičeva ulica 13, SI - 1000  
Ljubljana

**Contact:** Barbara Zmrzlikar

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## Contractor

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**Name:** Valicon d.o.o.

**Address:** Kopitarjeva 2, 1000 Ljubljana

**Contact:** Zenel Batagelj

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### STATEMENT ON THE PROTECTION OF RESPONDENTS' PERSONAL DATA

As per ESOMAR and AAPOR codes, the Valicon company is obliged to protect the personal data of respondents. Valicon thus takes all measures to prevent the possibility of recognising the identity of the respondents. All variables or fields which could directly reveal the identity of the respondent were removed from databases and reports. Respondents' replies were also physically separated from their data. Every attempt by the Contracting Authority or the Valicon company to deliberately identify a respondent or disclose the respondent's identity denotes a violation of the above codes.

# INTRODUCTION





**8**  
countries



REPRESENTATIVE SAMPLE

**23.647**

respondents



**12.380**

representatives of  
the target group



**2.771**

tourists and visitors  
to Slovenia

**12**  
PERSONAS



**T = 19:15**

Average duration of the survey



**14 November – 5 December 2017**

Period of data collection

Team of **10 EXPERTS FROM VALICON**  
WORKING ON THE PROJECT

**VALICON**

Global provider of web panels:

**research  
now®**

# About the project

VALICON conducted a global online survey, 'Identification of market potential,' for the Slovenian Tourist Board, which took place simultaneously on 8 target markets:

- **Italy,**
- **Austria,**
- **Germany,**
- **United Kingdom,**
- **France,**
- **the Russian Federation,**
- **the Netherlands, and**
- **Poland.**





# Content of the survey

The survey was used to examine:

- **structure of the market and market potential**
  - presence of 12 personas (segments) identified in the market research, 'Segmentation – identification of target groups of Slovenian tourism,' and structure of the target population according to the segments
  - identification of key segments (the largest or the one with the largest economic potential)
- **travel motives** and **the purchase decision process** for travelling within the region (Europe)
- **perception** and **competitive positioning** of the destination of Slovenia
- **knowledge of**, and **experience with**, visiting Slovenia, including the **degree of recommendation**



# Substantive sets according to the level of analysis

The data obtained were analysed for each individual market at the level of the entire target group and at the level of various subsamples.

## ENTIRE TARGET GROUP

Encompasses characteristics of those who **go abroad** in order to travel, have a break or a holiday **at least once a year** and **spend at least two nights** there.

## VISITORS TO SLOVENIA (subsample 1)

Encompasses characteristics of those who **go abroad** in order to travel, have a break or a holiday **at least once a year** and **spend at least two nights** there. They know **Slovenia** and have already **visited** it, whereby short and non-tourist visits were also included.

## TOURISTS IN SLOVENIA (subsample 2)

Encompasses characteristics of those who **go abroad** in order to travel, have a break or a holiday at least once a year and **spend at least two nights** there. The **destinations** where they have spent at least two nights also include **Slovenia**.

## DISPLAY OF RESULTS:

- General **travel habits** and **motives**
- **Elements of the purchase journey** and **consumption**

- **image** and **perception** of Slovenia

- **market structure** (personas)

- **knowledge, experience** and **NPS scale**

- **image** and **perception** of Slovenia



# About the Contractor

## VALICON

**Valicon** is a company operating in the field of marketing consulting with 20 years of rich experience dealing with market research. We adapt regional strategies to local markets and believe in long-term partnerships with our clients.

We do not merely conduct market research or collect data by means of surveys. **Our advanced technologies** differentiate us from others, while our services **add value to the business operations and brands** of our clients. We combine various approaches, such as market research, analytics and automation, marketing consulting and data collection in order to provide the highest level of quality and applicability in further steps of marketing processes and activities.

We rely on a proven structure where all our solutions observe the cycle of activities of your brand, product or company.





## Panel presentation

The research was conducted in cooperation with the renowned **provider of web panels, Research Now**. The company is active globally when collecting data in Europe, the Middle East, America and the Asia-Pacific area, and is a **leading expert** in developing programme solutions for collecting data in multiple languages. It **holds the ISO 20252 certificate** and has **received** several **awards**. All their web **panels** are **actively controlled, protected** and generated on the basis of ten years' experience and enable **the implementation of projects on a high quality level**. Web panels are locally managed and provide support in the local language, while observing differences between countries and enabling adjusted awarding of members of the web panel. To obtain respondents, various programmes are used (eRewards®, Valued Opinions® and Peanut Labs®), which **enable access to** the most **representative** and **high-quality target groups** in various branches.

With its panels, **the company provided a sample of respondents**, who completed the survey in their languages **within the Valicon survey system**, with which **supervision of the sample structure** and **data quality** was maintained simultaneously.



Source: 2016 Annual Survey of Market Research Professionals (MarketResearchCareers.com)

# METHODOLOGY



# Methodological framework of the survey



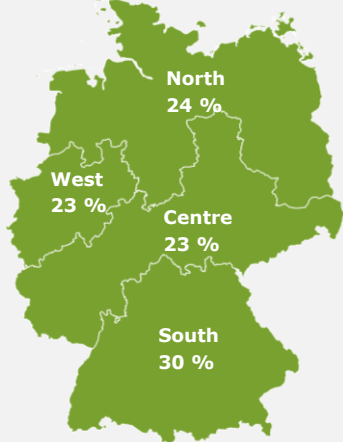
<b>Method of implementation</b>	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
<b>Country of implementation</b>	Germany
<b>Implementation period</b>	14 November – 23 November 2017
<b>Target group</b>	Citizens of a certain country, who <u>travel abroad at least once a year for a break, holiday, or a trip and spend at least two nights there.</u>
<b>Sample</b>	Entire sample: n=2,330 Target group: n=1,542 Visitors to Slovenia: n=294 Tourists in Slovenia: n=45
<b>Representativeness</b>	A target person was selected from the sample framework, which was representative of the population. The data were weighted according to gender, age and region.
<b>Survey length</b>	Average duration of the survey: t=18:37.



# GERMANY: Sample demographics



## REGIONS:



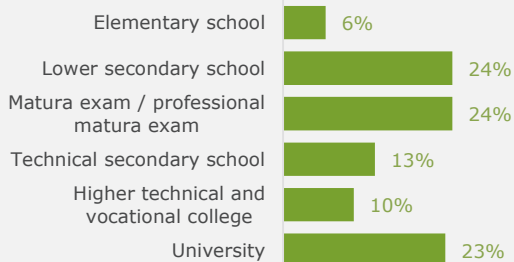
### DETAILED DEFINITION OF REGIONS:

**North:** Berlin, Brandenburg, Bremen, Hamburg, Mecklenburg-West Pomerania, Lower Saxony, Schleswig-Holstein. **West:** North Rhine-Westphalia. **Centre:** Hessen, Rhineland-Palatinate, Saarland, Saxony, Saxony-Anhalt, Thuringia. **South:** Baden-Württemberg, Bavaria.

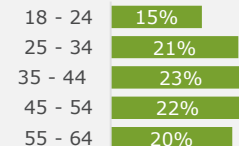
## GENDER:



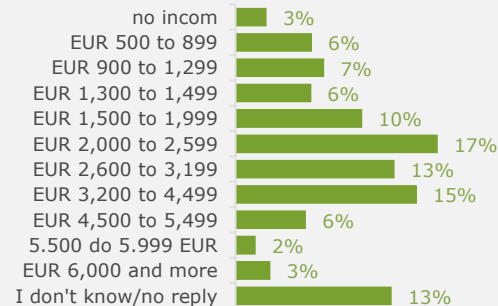
## EDUCATION:



## AGE:



## PERSONAL INCOME:



# Sample shares and sizes



*Bordered ellipses show the basis for share calculations.*



Basis: GERMANY 18-65-year-olds	
POPULATION (18-65 YEARS)	100.0%
TARGET GROUP	66.1%
VISITORS TO SLOVENIA	12.6%
TOURISTS IN SLOVENIA	1.9%

Basis: TARGET GROUP	
POPULATION (18-65 YEARS)	/
TARGET GROUP	100.0%
VISITORS TO SLOVENIA	19.0%
TOURISTS IN SLOVENIA	2.9%

Absolute size*	
	51,549,829
	34,095,184
	6,509,176
	991,753

\* The absolute size is always calculated according to the population in a country aged between 18 and 65.

# **MARKET STRUCTURE AND SIZE (PERSONAS)**



# GERMANY: Size of the potential



Top choice

0,2%

**NARROW  
POTENTIAL**  
Top choice +  
repeated visit

2%

5%

**BROAD  
POTENTIAL**  
Choice

5%

29%

Visit or choice

7%

7%

**NEM /  
GERMAN**

n=1542

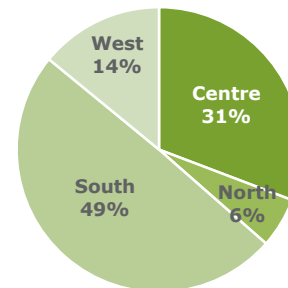
## NARROW POTENTIAL:

**2%**

*Tourists whose first  
choice for a tourist  
visit would be Slovenia  
(narrow interest – top  
choice) OR those who  
have already been to  
Slovenia and would  
visit it again*

	Size*
<b>Total in TG:</b>	<b>648,441</b>
Centre	199,555
North	36,922
South	320,779
West	91,185

## REGIONAL CLASSIFICATION:



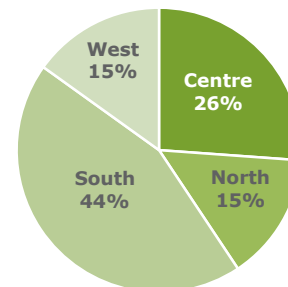
## BROAD POTENTIAL:

**5%**

*Tourists who would  
visit Slovenia in the  
future (broad interest)  
OR those who have  
already been to  
Slovenia and would  
visit it again*

	Size*
<b>Total in TG:</b>	<b>1,839,065</b>
Centre	480,810
North	266,924
South	813,751
West	277,581

## REGIONAL CLASSIFICATION:



### NOTES:

The pyramid shows the choice of Slovenia as a tourist destination and is divided into four stages: **1. VISIT OR CHOICE:** The share in the target group (TG) who have stayed in Slovenia at least two nights for a break, holiday or trip or who would choose Slovenia as a tourist destination in the future (the first and other choices) **2. CHOICE:** The share in TG who would choose Slovenia as a tourist destination in the future (the first and other choices) or who have already been to Slovenia and would visit it again. **3. REPEATED VISIT AND TOP CHOICE:** The share in TG who have already been to Slovenia and would visit it again OR would choose Slovenia as their next tourist destination (top choice). **4. TOP CHOICE:** The share in TG who would choose Slovenia as their next tourist destination (first choice). / The size is calculated according to the target population aged between 18 and 65.

## GERMANY: Size of segments by regions



## GREEN EXPLORERS:

17.2%

5,879,195



## URBAN CONSUMERS:

17.0%

5,805,746

BEAUTY AND  
INDULGENCE LOVERS:

15.3%

5,212,283

		Total	Centre	North	South	West
	%	100.0%	23.0%	24.1%	30.4%	22.5%
	Size	34,095,184	7,841,832	8,229,122	10,355,243	7,668,988
GREEN EXPLORERS	%	17.2%	22.9%	20.7%	34.1%	22.4%
	Size	5,879,195	1,343,654	1,215,025	2,005,865	1,314,652
SOCIABLE FOODIES	%	7.2%	18.5%	32.6%	28.5%	20.4%
	Size	2,439,928	452,385	794,904	694,445	498,194
URBAN CONSUMERS	%	17.0%	22.8%	24.3%	30.1%	22.8%
	Size	5,805,746	1,323,401	1,411,240	1,744,657	1,326,448
URBAN CONSCIOUS	%	4.9%	22.5%	23.0%	30.2%	24.4%
	Size	1,678,220	376,800	385,463	506,361	409,595
RELAXED ESCAPISTS	%	7.4%	22.4%	21.9%	26.7%	28.9%
	Size	2,517,630	564,950	552,200	672,131	728,349
ACTIVE NOSTALGISTS	%	7.3%	27.0%	19.9%	31.3%	21.8%
	Size	2,480,458	668,888	494,691	776,189	540,690
ADVENTURISTS	%	3.5%	35.1%	17.8%	34.9%	12.2%
	Size	1,177,773	413,781	209,306	411,465	143,221
FOREVER YOUNG	%	10.0%	21.6%	23.9%	29.9%	24.5%
	Size	3,413,418	738,563	815,526	1,021,849	837,480
BEAUTY AND INDULGENCE LOVERS	%	15.3%	22.8%	25.1%	29.7%	22.3%
	Size	5,212,283	1,190,505	1,308,222	1,548,698	1,164,858
DEVOTED MOTHERS	%	4.9%	23.1%	36.0%	24.9%	16.0%
	Size	1,666,940	385,698	599,747	415,481	266,014
ACTIVE FAMILIES	%	2.8%	21.4%	23.0%	35.3%	20.4%
	Size	952,015	203,456	218,782	335,897	193,880
CAREFREE YOUTH	%	2.6%	20.6%	25.7%	25.5%	28.2%
	Size	871,577	179,751	224,015	222,206	245,607

## NOTES:

Percentages in the 'Total' column (marked grey) show the shares of segments according to the entire target group (they travel abroad for a break or holiday). Percentages in the columns with regions (marked green) show the distribution of an individual segment by regions. The sizes of individual segments (marked white) in regions and in the 'Total' column are calculated on the basis of the size of the entire population aged between 18 and 65.





## DESTINATION TYPE

By the sea	77%
Cities	49%
By a lake	42%
In the mountains	38%
Elsewhere in nature	37%

TYPE OF  
ACCOMMODATION

Hotel	83%
Apartment	50%
Private accommodation (e.g. Airbnb)	22%
Staying with relatives or friends	21%
Hostel	19%

TRANSPORT TO THE  
DESTINATION

Aeroplane	60%
Car	30%
Train	3%
Motorhome (camper)	3%
Coach	2%

TRANSPORT AT THE  
DESTINATION

Car	73%
Coach	29%
On foot	23%
Train	17%
Bicycle	9%

## ACTIVITIES

Sun and sea	65%
Sightseeing of a town, the capital	52%
Sightseeing of old town centres	51%
Natural sights, nature	50%
Seeing major tourist attractions	48%

## MOTIVATION

Past experience	49%
Recommendations from friends	41%
Articles on the Internet	31%
Price of the destination	26%
TV programmes	23%

SOURCE OF  
INFORMATION

Articles on the Internet	54%
Friends, family	46%
Travel literature	29%
Web portals (TripAdvisor etc.)	22%
Articles in print media	16%

## RESERVATION METHOD

Booking.com	41%
Directly at the accommodation provider	29%
Expedia.com	28%
Agency	23%
Airbnb	15%

## TRAVELLING WITH

As a couple	48%
Family	32%
Friends	12%
Alone	8%
Relatives	0%

## CHARACTERISTICS:

Size*	<b>34,095,184</b>
Share*	<b>66%</b>
Age	<b>41</b>
Women	<b>48%</b>

Spring	<b>18%</b>
Summer	<b>62%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## GERMANY: Tourists in Slovenia (2.9%)



## DESTINATION TYPE

Cities	63%	+14
In the mountains	52%	+14
Elsewhere in nature	48%	+11
Spas (wellness and spa)	23%	+10
By the sea	73%	-4

TYPE OF  
ACCOMMODATION

<b>Boutique hotel</b>	<b>33%</b>	<b>+18</b>
Staying with relatives or friends	27%	+5
Hostel	24%	+5
Apartment	52%	+2
Hotel	81%	-1

TRANSPORT TO THE  
DESTINATION

Car	45%	+15
Coach	2%	+0
Motorhome (camper)	2%	-1
Aeroplane	48%	-12
Train	2%	-1

TRANSPORT AT THE  
DESTINATION

Car	74%	+1
Coach	34%	+5
Motorhome (camper)	11%	+6
Motorcycle	11%	+6
On foot	22%	-1

## ACTIVITIES

Sightseeing of a town, the capital	63%	+10
Seeing major tourist attractions	57%	+9
Social events, festivals	34%	+12
Sports activities	39%	+8
Learning about the local way of life	45%	+8

## MOTIVATION

<b>TV programmes</b>	<b>44%</b>	<b>+21</b>
Price of the destination	36%	+9
<b>Suitability of the destination in all seasons</b>	<b>28%</b>	<b>+13</b>
<b>Articles in print media</b>	<b>27%</b>	<b>+13</b>
Recommendations from friends	43%	+2

SOURCE OF  
INFORMATION

Friends, family	55%	+9
Travel literature	38%	+9
Articles in print media	25%	+9
Articles on the Internet	56%	+2
Web portals (TripAdvisor etc.)	25%	+3

## RESERVATION METHOD

<b>Booking.com</b>	<b>58%</b>	<b>+17</b>
<b>At the activity provider</b>	<b>20%</b>	<b>+13</b>
Directly at the accommodation provider	34%	+5
Agency	30%	+7
<b>Agoda.com</b>	<b>13%</b>	<b>+8</b>

## TRAVELLING WITH

Friends	18%	+6
Family	32%	+1
As a couple	39%	-9
Alone	11%	+2

## CHARACTERISTICS:

Size*	<b>991,753</b>
Share*	<b>2%</b>
Age	<b>40</b>
Women	<b>44%</b>

Spring	<b>26%</b>
Summer	<b>52%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

# GERMANY: Green explorers (17.2%)



## DESTINATION TYPE

Cities	79%	+30
By the sea	94%	+17
In the mountains	64%	+26
Cultural and historical centres	50%	+26
By a lake	65%	+22

## TYPE OF ACCOMMODATION

Apartment	73%	+23
Private accommodation (e.g. Airbnb)	32%	+10
Staying with relatives or friends	29%	+7
Hotel	84%	+2
Hostel	24%	+5

## TRANSPORT TO THE DESTINATION

Car	33%	+4
Train	5%	+2
Coach	2%	+0
Aeroplane	57%	-4
Motorhome (camper)	2%	-1

## TRANSPORT AT THE DESTINATION

Train	25%	+8
Car	78%	+4
Coach	34%	+5
On foot	28%	+5
Bicycle	13%	+3

## ACTIVITIES

Sightseeing of old town centres	81%	+30
Natural sights, nature	76%	+26
Sightseeing of a town, the capital	75%	+23
Learning about the local way of life	53%	+16
Sports activities	47%	+17

## MOTIVATION

Recommendations from friends	50%	+9
TV programmes	31%	+7
Articles on the Internet	38%	+8
Travel literature	30%	+7
Past experience	52%	+3

## SOURCE OF INFORMATION

Articles on the Internet	65%	+12
Friends, family	54%	+7
Travel literature	40%	+10
Web portals (TripAdvisor etc.)	28%	+6
Articles in print media	22%	+5

## RESERVATION METHOD

Booking.com	51%	+10
Directly at the accommodation provider	39%	+10
Airbnb	21%	+5
Expedia.com	32%	+4
Through official TICs	9%	+3

## TRAVELLING WITH

As a couple	51%	+3
Alone	11%	+3
Family	26%	-6
Friends	11%	+0
Relatives	1%	+0

## CHARACTERISTICS:

Size*	5,879,195
Share*	11%
Age	42
Women	54%

Spring	20%
Summer	64%
Shorter trips	2
Longer trips	2

### NOTES:

Percentages in the title show the share of the segment according to the entire target group (they travel abroad for a break or holiday). / DATA IN TABLES: positive and statistically significant differences are bold and underlined. The first number shows the percentage of replies for an individual element, and the second number reveals the deviation in percentage points from the entire target group in the country. / CHARACTERISTICS: \*The size and share show the size of the segment according to the population aged between 18 and 65.

# GERMANY: Urban consumers (17.0%)



## DESTINATION TYPE

<u>Cities</u>	<b>80%</b>	<b>+31</b>
By the sea	77%	+0
Capitals	33%	+2
By a lake	25%	-17
Cultural and historical centres	18%	-6

## TYPE OF ACCOMMODATION

<u>Hotel</u>	<b>92%</b>	<b>+10</b>
Staying with relatives or friends	22%	+0
Private accommodation (e.g. Airbnb)	20%	-2
Boutique hotel	16%	+0
Apartment	41%	-9

## TRANSPORT TO THE DESTINATION

<u>Aeroplane</u>	<b>69%</b>	<b>+9</b>
Coach	2%	+0
Ship or another vessel	1%	+0
Car	24%	-6
Train	2%	-1

## TRANSPORT AT THE DESTINATION

Car	72%	-2
<u>Coach</u>	<b>32%</b>	<b>+3</b>
<u>On foot</u>	<b>27%</b>	<b>+4</b>
<u>Train</u>	<b>21%</b>	<b>+4</b>
Bicycle	5%	-4

## ACTIVITIES

<u>Shopping</u>	<b>69%</b>	<b>+28</b>
<u>Sightseeing of a town, the capital</u>	<b>67%</b>	<b>+15</b>
Gastronomy	51%	+14
Wellness and spa	45%	+14
Sun and sea	71%	+6

## MOTIVATION

Past experience	51%	+2
<u>Articles on the Internet</u>	<b>37%</b>	<b>+6</b>
<u>Popularity of the destination</u>	<b>26%</b>	<b>+7</b>
Recommendations from friends	43%	+2
Price of the destination	28%	+1

## SOURCE OF INFORMATION

Friends, family	48%	+2
<u>Opinions in social media</u>	<b>21%</b>	<b>+7</b>
Web portals (TripAdvisor etc.)	24%	+2
Articles on the Internet	53%	-1
Web forums	16%	+0

## RESERVATION METHOD

<u>Expedia.com</u>	<b>31%</b>	<b>+3</b>
<u>Other web portal</u>	<b>13%</b>	<b>+3</b>
Airbnb	16%	+1
Booking.com	39%	-2
Agency	23%	+0

## TRAVELLING WITH

<u>As a couple</u>	<b>56%</b>	<b>+8</b>
Friends	14%	+2
Family	22%	-10
Alone	9%	+0

## CHARACTERISTICS:

Size*	<b>5,805,746</b>
Share*	<b>11%</b>
Age	<b>41</b>
Women	<b>52%</b>

Spring	<b>22%</b>
Summer	<b>52%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

### NOTES:

Percentages in the title show the share of the segment according to the entire target group (they travel abroad for a break or holiday). / DATA IN TABLES: positive and statistically significant differences are bold and underlined. The first number shows the percentage of replies for an individual element, and the second number reveals the deviation in percentage points from the entire target group in the country. / CHARACTERISTICS: \*The size and share show the size of the segment according to the population aged between 18 and 65.

## GERMANY: Beauty and indulgence lovers (15.3%)



## DESTINATION TYPE

By the sea	<b>98%</b>	<b>+21</b>
By a lake	45%	+2
<b>Spas (wellness and spa)</b>	<b>28%</b>	<b>+15</b>
In the mountains	26%	-12
Capitals	19%	-12

TYPE OF  
ACCOMMODATION

Hotel	<b>88%</b>	<b>+5</b>
Apartment	48%	-2
Own property (holiday cottage)	8%	-2
Private accommodation (e.g. Airbnb)	18%	-4
Staying with relatives or friends	18%	-4

TRANSPORT TO THE  
DESTINATION

<b>Aeroplane</b>	<b>64%</b>	<b>+4</b>
Car	31%	+1
Coach	2%	+0
Train	1%	-2
Ship or another vessel	0%	-1

TRANSPORT AT THE  
DESTINATION

Car	76%	+2
Coach	31%	+2
On foot	24%	+1
Bicycle	9%	+0
Motorhome (camper)	2%	-3

## ACTIVITIES

Sun and sea	89%	+25
Shopping	60%	+20
Wellness and spa	54%	+23
Recreation	37%	+11
Activities and fun for children	32%	+15

## MOTIVATION

Price of the destination	<b>37%</b>	<b>+11</b>
Past experience	50%	+1
<b>Recommendations from friends</b>	<b>44%</b>	<b>+3</b>
<b>Popularity of the destination</b>	<b>22%</b>	<b>+3</b>
<b>Proximity of the destination</b>	<b>22%</b>	<b>+6</b>

SOURCE OF  
INFORMATION

<b>Friends, family</b>	<b>52%</b>	<b>+6</b>
Articles on the Internet	55%	+1
<b>Agencies</b>	<b>16%</b>	<b>+6</b>
Web forums	17%	+1
Web portals (TripAdvisor etc.)	23%	+0

## RESERVATION METHOD

<b>Agency</b>	<b>31%</b>	<b>+8</b>
<b>Other web portal</b>	<b>14%</b>	<b>+4</b>
Directly at the accommodation provider	26%	-3
Expedia.com	24%	-5
Booking.com	33%	-8

## TRAVELLING WITH

<b>Family</b>	<b>50%</b>	<b>+18</b>
Friends	8%	-4
As a couple	38%	-10
Alone	4%	-4

## CHARACTERISTICS:

Size*	<b>5,212,283</b>
Share*	<b>10%</b>
Age	<b>42</b>
Women	<b>58%</b>

Spring	<b>12%</b>
Summer	<b>67%</b>
Shorter trips	<b>2</b>
Longer trips	<b>1</b>

# GERMANY: Forever young (10.0%)



## DESTINATION TYPE

By the sea	63%	-14
Cultural and historical centres	19%	-5
In the mountains	23%	-15
Countryside	16%	-6
Health resorts	3%	-2

## TYPE OF ACCOMMODATION

<b>Hotel</b>	<b>90%</b>	<b>+8</b>
Staying with relatives or friends	16%	-5
Camp	9%	-2
Apartment	36%	-14
Private accommodation (e.g. Airbnb)	16%	-6

## TRANSPORT TO THE DESTINATION

<b>Train</b>	<b>5%</b>	<b>+2</b>
Aeroplane	63%	+2
<b>Motorhome (camper)</b>	<b>4%</b>	<b>+1</b>
Coach	3%	+1
Car	24%	-6

## TRANSPORT AT THE DESTINATION

Coach	27%	-2
Motorcycle	6%	+1
Car	70%	-3
Bicycle	9%	+0
On foot	20%	-3

## ACTIVITIES

Sightseeing of old town centres	<b>72%</b>	<b>+21</b>
Seeing major tourist attractions	<b>64%</b>	<b>+16</b>
Touring	<b>36%</b>	<b>+17</b>
Sightseeing of a town, the capital	<b>60%</b>	<b>+8</b>
History and castles	<b>55%</b>	<b>+19</b>

## MOTIVATION

<b>Travel literature</b>	<b>27%</b>	<b>+5</b>
Articles on the Internet	32%	+1
Proximity of the destination	18%	+2
<b>Articles in print media</b>	<b>16%</b>	<b>+3</b>
Price of the destination	27%	+0

## SOURCE OF INFORMATION

<b>Travel literature</b>	<b>37%</b>	<b>+8</b>
Articles on the Internet	51%	-3
Travel presentations	13%	+1
Web portals (TripAdvisor etc.)	20%	-2
Articles in print media	16%	+0

## RESERVATION METHOD

Booking.com	41%	+0
<b>Other web portal</b>	<b>13%</b>	<b>+3</b>
Directly at the accommodation provider	28%	-1
At the activity provider	9%	+2
Organiser	6%	+1

## TRAVELLING WITH

As a couple	52%	+4
Friends	11%	-1
Alone	10%	+2
Family	27%	-4

## CHARACTERISTICS:

Size*	<b>3,413,418</b>
Share*	<b>7%</b>
Age	<b>43</b>
Women	<b>41%</b>

Spring	<b>20%</b>
Summer	<b>56%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

### NOTES:

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## GERMANY: Relaxed escapists (7.4%)



## DESTINATION TYPE

Countryside	24%	+1
By a lake	30%	-12
Elsewhere in nature	26%	-11
By the sea	56%	-22
Spas (wellness and spa)	6%	-7

TYPE OF  
ACCOMMODATION

Hotel	85%	+2
<b>Tourist farm</b>	<b>18%</b>	<b>+5</b>
<b>Own property</b>	<b>13%</b>	<b>+3</b>
<b>(holiday cottage)</b>	<b>8%</b>	<b>+4</b>
<b>Glamping</b>	<b>17%</b>	<b>-4</b>
Staying with relatives or friends		

TRANSPORT TO THE  
DESTINATION

<b>Motorhome</b>	<b>7%</b>	<b>+4</b>
<b>(camper)</b>		
Car	29%	-1
<b>Ship or another vessel</b>	<b>3%</b>	<b>+2</b>
<b>Bicycle</b>	<b>2%</b>	<b>+2</b>
Aeroplane	54%	-6

TRANSPORT AT THE  
DESTINATION

Coach	26%	-3
<b>Motorcycle</b>	<b>9%</b>	<b>+4</b>
Train	14%	-2
Car	66%	-7
On foot	18%	-5

## ACTIVITIES

Thermal health spas	31%	+16
Natural sights, nature	52%	+2
<b>Gastronomy</b>	<b>41%</b>	<b>+4</b>
<b>Selfness, digital-detox, etc.</b>	<b>23%</b>	<b>+17</b>
Sightseeing of a town, the capital	51%	-1

## MOTIVATION

<b>Articles in print media</b>	<b>19%</b>	<b>+5</b>
TV programmes	24%	+1
Articles on the Internet	27%	-4
Travel presentations	14%	+3
Videos on the Internet	16%	+1

SOURCE OF  
INFORMATION

<b>Travel presentations</b>	<b>21%</b>	<b>+10</b>
<b>Blogs</b>	<b>19%</b>	<b>+3</b>
Articles on the Internet	47%	-7
Web forums	17%	+1
Friends, family	28%	-18

## RESERVATION METHOD

Expedia.com	29%	+0
Agoda.com	8%	+3
Airbnb	15%	+0
Booking.com	37%	-4
Organiser	6%	+1

## TRAVELLING WITH

Family	32%	+0
<b>Friends</b>	<b>16%</b>	<b>+4</b>
As a couple	45%	-3
Alone	8%	-1

## CHARACTERISTICS:

Size*	<b>2,517,630</b>
Share*	<b>5%</b>
Age	<b>38</b>
Women	<b>45%</b>

Spring	<b>21%</b>
Summer	<b>60%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

## NOTES:

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## GERMANY: Active nostalgists (7.3%)



## DESTINATION TYPE

By a lake	61%	+19
In the mountains	58%	+20
Elsewhere in nature	57%	+20
Countryside	21%	-1
By the sea	59%	-18

TYPE OF  
ACCOMMODATION

Boutique hotel	27%	+11
Tourist farm	18%	+4
Own property	16%	+7
(holiday cottage)	80%	-2
Hotel	14%	+3
Camp		

TRANSPORT TO THE  
DESTINATION

Car	35%	+5
Motorhome		
(camper)	6%	+3
Motorcycle	2%	+1
Aeroplane	54%	-7
Ship or another vessel	1%	+0

TRANSPORT AT THE  
DESTINATION

Car	72%	-1
Motorhome		
(camper)	11%	+6
Coach	18%	-11
On foot	16%	-7
Train	11%	-6

## ACTIVITIES

Sports activities	43%	+13
Visit to a wine cellar	27%	+15
Winter sports	24%	+8
Natural sights, nature	45%	-5
Gastronomy	34%	-3

## MOTIVATION

Recommendations	37%	-4
from friends		
Travel presentations	14%	+2
Past experience	43%	-6
Articles in print media	14%	+0
Travel literature	18%	-4

SOURCE OF  
INFORMATION

Friends, family	44%	-3
Articles in print media	19%	+2
Travel presentations	14%	+2
Agencies	10%	+0
Web portals		
(TripAdvisor etc.)	16%	-6

## RESERVATION METHOD

Agency	28%	+5
Directly at the		
accommodation	30%	+0
provider		
Own accommodation	11%	+0
Expedia.com	27%	-1
Booking.com	33%	-8

## TRAVELLING WITH

As a couple	66%	+18
Alone	11%	+3
Family	16%	-16
Friends	7%	-4

## CHARACTERISTICS:

Size*	2,480,458
Share*	5%
Age	41
Women	40%

Spring	13%
Summer	63%
Shorter trips	3
Longer trips	2



# GERMANY: Sociable foodies (7.2%)



## DESTINATION TYPE

Cities	82%	+33
Capitals	66%	+35
Cultural and historical centres	66%	+42
By the sea	93%	+15
Elsewhere in nature	59%	+22

## TYPE OF ACCOMMODATION

Hotel	94%	+12
Boutique hotel	33%	+17
Private accommodation (e.g. Airbnb)	33%	+10
Apartment	53%	+3
Staying with relatives or friends	28%	+6

## TRANSPORT TO THE DESTINATION

Aeroplane	70%	+9
Train	3%	+0
Coach	2%	+0
Car	24%	-5
Ship or another vessel	1%	+0

## TRANSPORT AT THE DESTINATION

Car	84%	+11
On foot	30%	+7
Coach	30%	+1
Bicycle	12%	+2
Train	17%	+0

## ACTIVITIES

Sightseeing of old town centres	89%	+38
Seeing major tourist attractions	87%	+39
History and castles	83%	+46
Sightseeing of a town, the capital	86%	+34
Natural sights, nature	84%	+34

## MOTIVATION

Past experience	71%	+22
TV programmes	37%	+13
Travel literature	36%	+14
Proximity of the destination	25%	+9
Suitability of the destination in all seasons	24%	+9

## SOURCE OF INFORMATION

Travel literature	51%	+21
Articles on the Internet	60%	+7
Web portals (TripAdvisor etc.)	37%	+15
Articles in print media	22%	+6
Friends, family	48%	+2

## RESERVATION METHOD

Booking.com	52%	+11
Agency	33%	+10
Directly at the accommodation provider	33%	+3
Own accommodation	15%	+4
Expedia.com	31%	+3

## TRAVELLING WITH

As a couple	49%	+1
Family	41%	+10
Alone	5%	-3
Friends	5%	-7

## CHARACTERISTICS:

Size*	2,439,928
Share*	5%
Age	44
Women	48%

Spring	17%
Summer	63%
Shorter trips	2
Longer trips	2

### NOTES:

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n=110

## GERMANY: Urban conscious (4.9%)



## DESTINATION TYPE

Cities	69%	+20
Capitals	52%	+21
Cultural and historical centres	34%	+10
Elsewhere in nature	28%	-8
By the sea	60%	-17

## TYPE OF ACCOMMODATION

Hostel	51%	+32
Private accommodation (e.g. Airbnb)	42%	+19
Staying with relatives or friends	29%	+7
Camp	18%	+7
Camper	18%	+9

## TRANSPORT TO THE DESTINATION

Aeroplane	63%	+3
Train	4%	+1
Motorcycle	2%	+1
Car	28%	-2
Ship or another vessel	2%	+1

## TRANSPORT AT THE DESTINATION

Coach	43%	+14
Train	32%	+15
Car	64%	-9
Motorcycle	11%	+6
On foot	27%	+4

## ACTIVITIES

Learning about the local way of life	71%	+34
Museums, galleries and art	65%	+38
Sightseeing of old town centres	74%	+23
Sightseeing of a town, the capital	69%	+17
Gastronomy	62%	+25

## MOTIVATION

Recommendations from friends	45%	+5
TV programmes	31%	+8
Posts on social media, blogs	25%	+12
Travel literature	27%	+5
Past experience	50%	+1

## SOURCE OF INFORMATION

Friends, family	58%	+12
Opinions in social media	23%	+9
Articles on the Internet	60%	+6
Web portals	27%	+5
(TripAdvisor etc.) Blogs	21%	+7

## RESERVATION METHOD

Booking.com	49%	+8
Airbnb	34%	+19
Expedia.com	36%	+7
At the activity provider	13%	+6
Own accommodation	15%	+4

## TRAVELLING WITH

As a couple	48%	+0
Friends	19%	+8
Alone	9%	+1
Family	24%	-8

## CHARACTERISTICS:

Size*	1,678,220
Share*	3%
Age	37
Women	46%

Spring	25%
Summer	59%
Shorter trips	3
Longer trips	2

## NOTES:

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## GERMANY: Devoted mothers (4.9%)



## DESTINATION TYPE

By a lake	62%	+20
In the mountains	57%	+19
By the sea	67%	-10
Countryside	31%	+9
Elsewhere in nature	29%	-7

TYPE OF  
ACCOMMODATION

Tourist farm	55%	+41
Apartment	61%	+12
Camper	22%	+13
Staying with relatives or friends	18%	-3
Camp	11%	+0

TRANSPORT TO THE  
DESTINATION

Car	47%	+18
Motorhome (camper)	6%	+3
Bicycle	3%	+2
Coach	4%	+2
Motorcycle	3%	+2

TRANSPORT AT THE  
DESTINATION

Car	82%	+8
Bicycle	15%	+5
Motorcycle	9%	+4
On foot	13%	-10
Coach	13%	-16

## ACTIVITIES

Sports activities	54%	+24
Countryside, farm activities	39%	+24
Natural sights, nature	54%	+4
Activities and fun for children	36%	+18
Winter sports	22%	+6

## MOTIVATION

Past experience	54%	+5
Proximity of the destination	18%	+3
Price of the destination	23%	-4
Videos on the Internet	17%	+1
TV ads	11%	+4

SOURCE OF  
INFORMATION

Friends, family	50%	+4
Articles on the Internet	52%	-1
Blogs	15%	+1
Travel literature	28%	-2
Web forums	13%	-2

## RESERVATION METHOD

Directly at the accommodation provider	45%	+16
Own accommodation	18%	+7
Through official TICs	11%	+5
Organiser	9%	+3
Booking.com	30%	-10

## TRAVELLING WITH

Family	55%	+24
Friends	6%	-6
As a couple	33%	-14
Relatives	2%	+2
Alone	3%	-6

## CHARACTERISTICS:

Size*	1,666,940
Share*	3%
Age	42
Women	44%

Spring	11%
Summer	75%
Shorter trips	3
Longer trips	2

## GERMANY: Adventurists (3.5%)



## DESTINATION TYPE

<u>Elsewhere in nature</u>	<b>64%</b>	<b>+27</b>
<u>In the mountains</u>	<b>57%</b>	<b>+18</b>
<u>By a lake</u>	<b>55%</b>	<b>+13</b>
<u>Countryside</u>	<b>33%</b>	<b>+10</b>
By the sea	47%	-30

TYPE OF  
ACCOMMODATION

<u>Tourist farm</u>	<b>32%</b>	<b>+18</b>
<u>Camper</u>	<b>27%</b>	<b>+18</b>
<u>Camp</u>	<b>25%</b>	<b>+14</b>
<u>Glamping</u>	<b>20%</b>	<b>+15</b>
Apartment	41%	-9

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	<b>42%</b>	<b>+12</b>
<u>Motorcycle</u>	<b>6%</b>	<b>+5</b>
<u>Motorhome (camper)</u>	<b>7%</b>	<b>+4</b>
Aeroplane	43%	-17
Train	2%	-1

TRANSPORT AT THE  
DESTINATION

<u>Motorhome (camper)</u>	<b>23%</b>	<b>+18</b>
<u>Motorcycle</u>	<b>22%</b>	<b>+17</b>
Car	62%	-11
Train	9%	-8
Coach	17%	-12

## ACTIVITIES

<u>Adrenaline sports challenges</u>	<b>41%</b>	<b>+35</b>
<u>History and castles</u>	<b>60%</b>	<b>+24</b>
<u>Mountaineering (more challenging tours)</u>	<b>40%</b>	<b>+30</b>
<u>Water sports activities</u>	<b>34%</b>	<b>+15</b>
<u>Winter sports</u>	<b>29%</b>	<b>+13</b>

## MOTIVATION

<u>Travel literature</u>	<b>29%</b>	<b>+6</b>
<u>Travel presentations</u>	<b>27%</b>	<b>+16</b>
<u>Posts on social media, blogs</u>	<b>21%</b>	<b>+8</b>
Web ads	14%	+5
Recommendations from friends	28%	-13

SOURCE OF  
INFORMATION

<u>Articles in print media</u>	<b>29%</b>	<b>+13</b>
<u>Travel literature</u>	<b>32%</b>	<b>+2</b>
<u>Articles on the Internet</u>	<b>41%</b>	<b>-13</b>
<u>Blogs</u>	<b>21%</b>	<b>+7</b>
<u>Travel presentations</u>	<b>21%</b>	<b>+9</b>

## RESERVATION METHOD

<u>Expedia.com</u>	<b>39%</b>	<b>+11</b>
<u>Booking.com</u>	<b>47%</b>	<b>+6</b>
<u>Agoda.com</u>	<b>13%</b>	<b>+8</b>
<u>Organiser</u>	<b>10%</b>	<b>+5</b>
<u>Airbnb</u>	<b>14%</b>	<b>-1</b>

## TRAVELLING WITH

<u>Family</u>	<b>39%</b>	<b>+8</b>
<u>Friends</u>	<b>23%</b>	<b>+11</b>
<u>Relatives</u>	<b>4%</b>	<b>+3</b>
<u>As a couple</u>	<b>33%</b>	<b>-15</b>
<u>Alone</u>	<b>2%</b>	<b>-7</b>

## CHARACTERISTICS:

Size*	<b>1,177,773</b>
Share*	<b>2%</b>
Age	<b>36</b>
Women	<b>27%</b>

Spring	<b>10%</b>
Summer	<b>68%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

## NOTES:

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## GERMANY: Active families (2.8%)



## DESTINATION TYPE

In the mountains	73%	+34
Elsewhere in nature	67%	+31
By a lake	62%	+19
Countryside	32%	+10
By the sea	64%	-14

TYPE OF  
ACCOMMODATION

Apartment	76%	+26
Private accommodation (e.g. Airbnb)	29%	+7
Hostel	28%	+10
Camper	18%	+9
Staying with relatives or friends	27%	+5

TRANSPORT TO THE  
DESTINATION

Aeroplane	62%	+2
Train	7%	+4
Coach	2%	+0
Ship or another vessel	2%	+1
Car	25%	-5

TRANSPORT AT THE  
DESTINATION

Train	29%	+12
On foot	24%	+1
Coach	27%	-2
Car	67%	-7
Bicycle	10%	+0

## ACTIVITIES

Sports activities	63%	+32
Mountaineering (more challenging tours)	49%	+39
Water sports activities	46%	+27
Learning about the local way of life	48%	+11
Touring	38%	+19

## MOTIVATION

Posts on social media, blogs	26%	+14
Travel literature	31%	+8
Travel presentations	23%	+12
Videos on the Internet	22%	+6
Recommendations from friends	39%	-2

SOURCE OF  
INFORMATION

Travel literature	32%	+2
Opinions in social media	20%	+6
Web forums	16%	+1
Articles on the Internet	44%	-10
Travel presentations	9%	-2

## RESERVATION METHOD

Airbnb	22%	+7
Directly at the accommodation provider	31%	+2
Agency	26%	+3
Expedia.com	29%	+1
Own accommodation	13%	+2

## TRAVELLING WITH

Alone	17%	+9
As a couple	37%	-11
Family	29%	-3
Friends	15%	+3
Relatives	2%	+2

## CHARACTERISTICS:

Size*	952,015
Share*	2%
Age	36
Women	38%

Spring	17%
Summer	65%
Shorter trips	3
Longer trips	2

## GERMANY: Carefree youth (2.6%)



## DESTINATION TYPE

Cities	61%	+12
By the sea	76%	-1
Capitals	30%	-1
Countryside	25%	+3
Elsewhere in nature	23%	-14

TYPE OF  
ACCOMMODATION

Hostel	51%	+33
Private accommodation (e.g. Airbnb)	29%	+7
Camp	16%	+5
Camper	12%	+3
Hotel	59%	-24

TRANSPORT TO THE  
DESTINATION

Aeroplane	69%	+8
Train	5%	+2
Motorhome (camper)	3%	+0
Coach	2%	+0
Ship or another vessel	2%	+1

TRANSPORT AT THE  
DESTINATION

Coach	29%	+0
Train	19%	+3
Car	71%	-3
Bicycle	9%	+0
Motorhome (camper)	5%	+0

## ACTIVITIES

Music festivals and concerts	38%	+23
Nightlife (bars, clubs)	37%	+21
Sightseeing of a town, the capital	57%	+5
Social events, festivals	32%	+10
Seeing major tourist attractions	47%	-2

## MOTIVATION

Recommendations from friends	44%	+3
Videos on the Internet	19%	+4
Articles on the Internet	28%	-3
Popularity of the destination	19%	+0
Posts on social media, blogs	14%	+1

SOURCE OF  
INFORMATION

Blogs	19%	+5
Friends, family	43%	-3
Opinions in social media	18%	+4
Web forums	14%	-1
Articles on the Internet	42%	-11

## RESERVATION METHOD

Directly at the accommodation provider	40%	+10
Airbnb	24%	+9
At the activity provider	9%	+2
Booking.com	37%	-4
Agency	24%	+1

## TRAVELLING WITH

Friends	25%	+13
As a couple	39%	-9
Alone	14%	+6
Family	22%	-10

## CHARACTERISTICS:

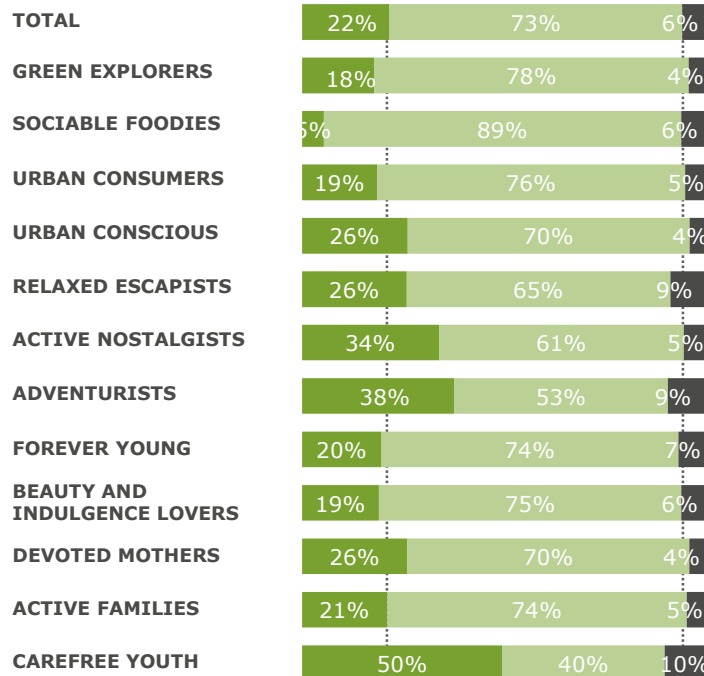
Size*	871,577
Share*	2%
Age	32
Women	43%

Spring	19%
Summer	69%
Shorter trips	3
Longer trips	1

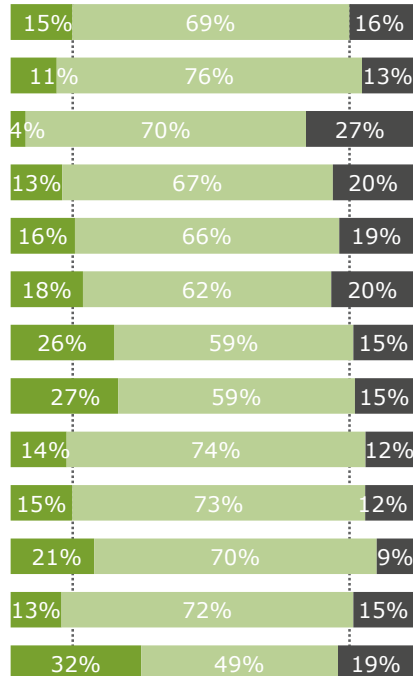
# GERMANY: Price sensitivity



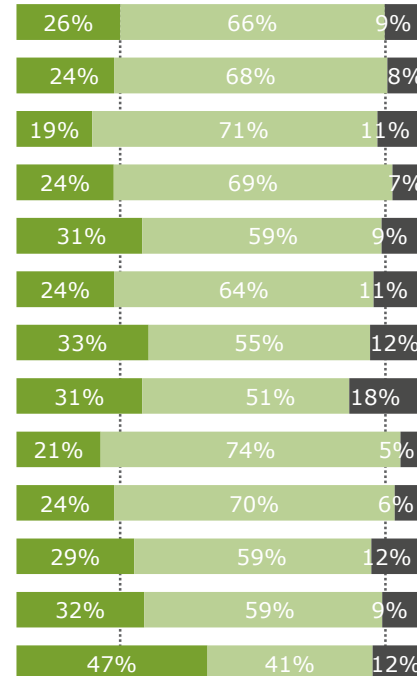
## CHOICE OF ACCOMMODATION



## CHOICE OF DESTINATION



## CHOICE OF TRANSPORT

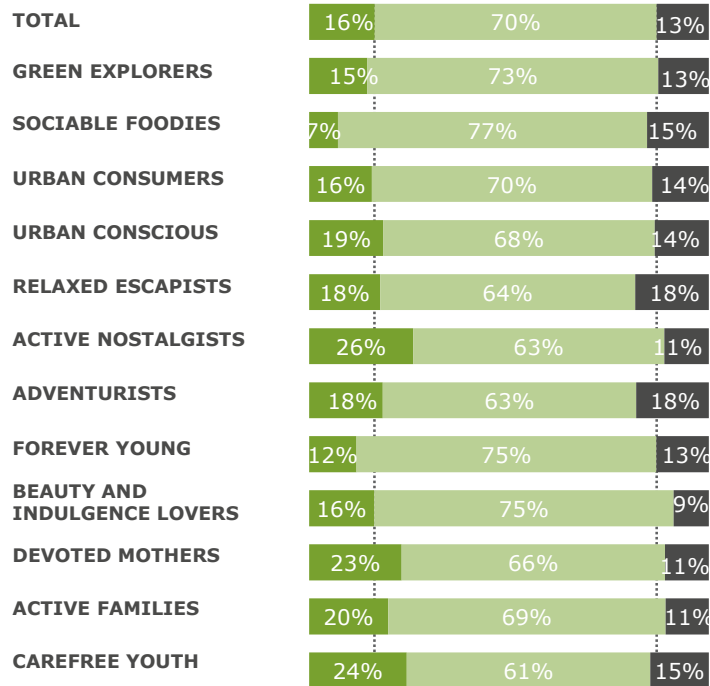


seek the most favourable offer
  assess value for money
  disregard the price

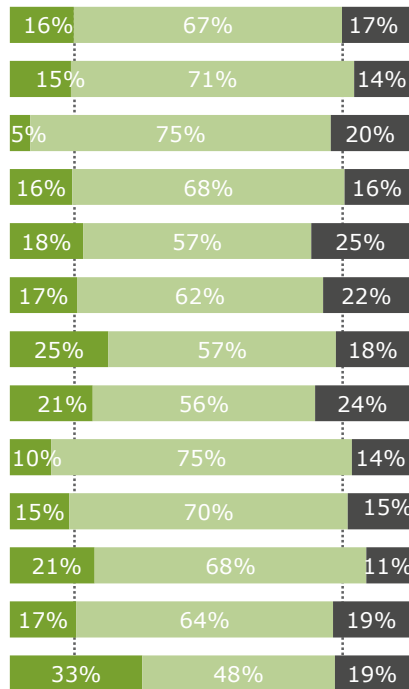
# GERMANY: Price sensitivity



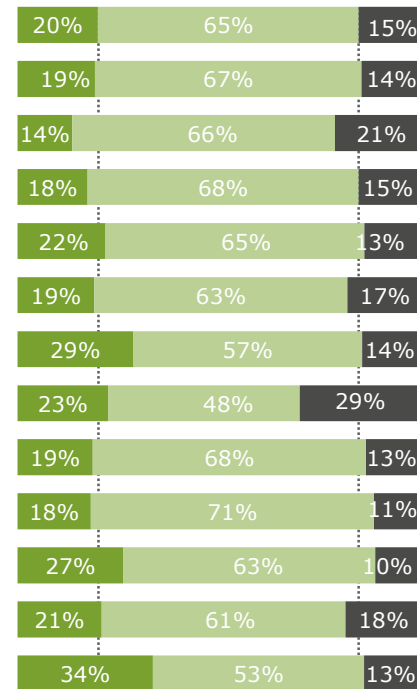
## CHOICE OF ADDITIONAL ACTIVITIES



## CHOICE OF FOOD



## SHOPPING



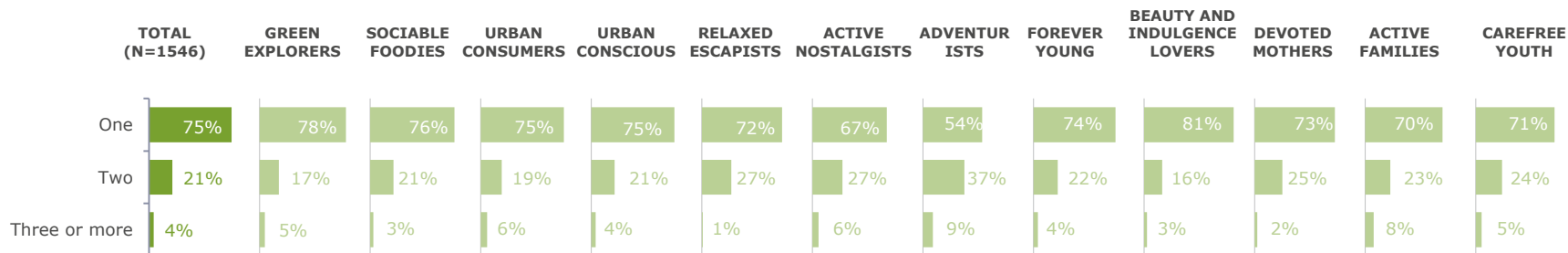
seek the most favourable offer
  assess value for money
  disregard the price



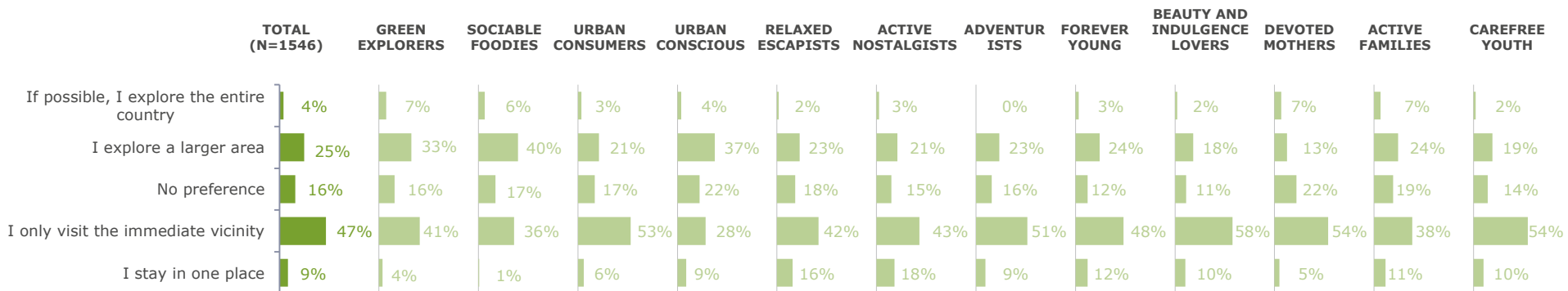
# GERMANY: Level of exploration



## Number of countries visited during one trip, break or holiday



## Exploring in one country



# **GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY**



## CHARACTERISTICS OF THE TARGET GROUP:

Size	<b>34,095,184</b>	Spring	<b>18%</b>
Proportion	<b>66.1%</b>	Summer	<b>62%</b>
Age	<b>41</b>	Shorter trips	<b>2</b>
Women	<b>48%</b>	Longer trips	<b>2</b>

## TRAVELLING WITH:

As a couple	<b>48%</b>
Family	<b>32%</b>
Friends	<b>12%</b>
Alone	<b>8%</b>

## DESTINATION TYPE:

By the sea	<b>55%</b>	<b>22%</b>	<b>77%</b>
Towns	<b>11%</b>	<b>37%</b>	<b>49%</b>
By a lake	<b>7%</b>	<b>35%</b>	<b>42%</b>

**4x**

a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sun and sea	<b>65%</b>
Sightseeing of towns, the capital	<b>52%</b>
Sightseeing of old town centres	<b>51%</b>
Nature parks, attractions	<b>50%</b>
Tourist attractions	<b>48%</b>
Shopping	<b>40%</b>
Gastronomic pleasures	<b>37%</b>
Live like a local	<b>37%</b>
History and castles	<b>36%</b>
Wellness and (beauty) spa	<b>31%</b>

## TRAVEL MOTIVES – TOP 10:

Relaxation	<b>13%</b>	<b>35%</b>
To learn something new	<b>13%</b>	<b>33%</b>
Rest, slow down the pace of life	<b>10%</b>	<b>29%</b>
Spend time with partner	<b>7%</b>	<b>27%</b>
Experience another culture	<b>6%</b>	<b>26%</b>
Visit a beautiful destination	<b>7%</b>	<b>25%</b>
Retreat from everyday life	<b>7%</b>	<b>25%</b>
Enjoy good food, drinks	<b>3%</b>	<b>23%</b>
Contact with nature	<b>4%</b>	<b>18%</b>
Clear one's head, gather thoughts	<b>2%</b>	<b>15%</b>

## VISITING COUNTRIES – TOP 10:

Spain	<b>41%</b>	<b>48%</b>
Austria	<b>34%</b>	<b>44%</b>
Italy	<b>35%</b>	<b>43%</b>
France	<b>31%</b>	<b>39%</b>
Greece	<b>23%</b>	<b>29%</b>
Non-European countries	<b>22%</b>	<b>28%</b>
Turkey	<b>13%</b>	<b>28%</b>
Netherlands	<b>19%</b>	<b>25%</b>
United Kingdom	<b>18%</b>	<b>23%</b>
Switzerland	<b>15%</b>	<b>22%</b>
Slovenia	<b>2%</b>	<b>4%</b>

**Repeated visit**  
**Visit**

## NOTES:

The results represent the target group: everyone who travels abroad at least once a year for a break or holiday. The data refer to trips to European destinations. / CHARACTERISTICS OF THE TARGET GROUP: The size and share show the size of the target group according to the population aged between 18 and 65. / TRAVELLING WITH: people with whom they travel. / DESTINATION TYPE: what type of destination is chosen. / ACTIVITIES – TOP 10: what do they do. / TRAVEL MOTIVES – TOP 10: what are their purposes for travelling (the main one and other reasons). / VISITING COUNTRIES: which countries they have visited so far and would visit again (Top 10, compared with Slovenia).

## GERMANY: Elements of the purchase journey and consumption

TYPE OF  
ACCOMMODATION:

Other frequent accommodation types:

**Relatives, friends: 21%**

**Hostel: 19%**

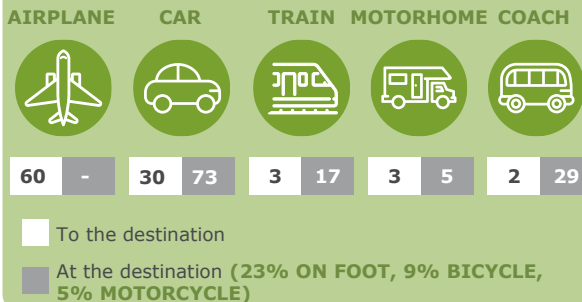
**Boutique hotel: 16%**

## RESERVATION

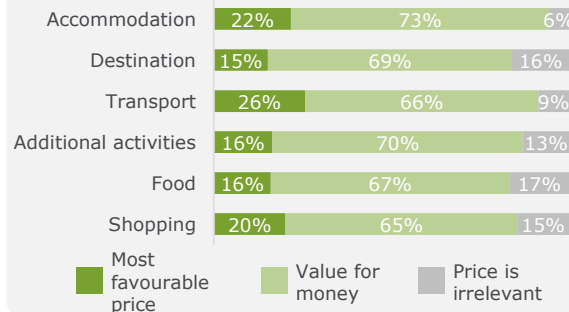
**UP  
TO 3**  
months in  
advance

**65%**

## TRANSPORT MODE (%):

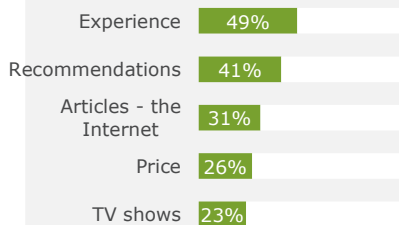


## PRICE SENSITIVITY:

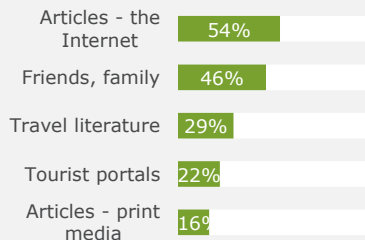


## PURCHASE JOURNEY:

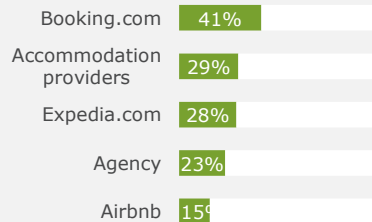
## MOTIVATIONS:



## SOURCES OF INFORMATION:



## RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€65	€66
TRANSPORT per person	€139	€146

## NOTES:

The results represent the target group: everyone who travels abroad at least once a year for a break or holiday. The data refer to trips to European destinations. / TYPE OF ACCOMMODATION: where they usually spend the night. / RESERVATION: how far in advance they book. / TRANSPORT MODE: how they travel to the destination and how they travel at the destination. / PRICE SENSITIVITY: level of attention paid to the price by elements. / PURCHASE JOURNEY: represents ordinary motivations which excite about the destination of the trip, information sources about the destination and reservation methods. / BUDGET (planned costs) AND SPENDING (actual costs): costs of transport per person and all other costs relating to the accommodation, food and activities per person per day.

# GERMANY: General travel habits and motives

Subsample: visitors to Slovenia



## CHARACTERISTICS OF VISITORS TO SLOVENIA:

Size	6,509,176	Spring	20%
Proportion	12.6%	Summer	63%
Age	40	Shorter trips	4
Women	45%	Longer trips	2

## TRAVELLING WITH:

As a couple	43%
Family	33%
Friends	12%
Alone	12%

## DESTINATION TYPE:

By the sea	47%	20%	67%
By a lake	11%	38%	49%
In the mountains	8%	39%	47%

6x  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sun and sea	56%
Sightseeing of old town centres	46%
Sightseeing of a town, the capital	45%
Tourist attractions	44%
History and castles	40%
Nature parks, attractions	40%
Gastronomic pleasures	37%
Live like a local	36%
Sports activities	35%
Recreation	32%

## TRAVEL MOTIVES – TOP 10:

Relaxation	10%	29%
Experience another culture	6%	28%
To learn something new	13%	28%
Retreat from everyday life	7%	25%
Enjoy good food, drinks	3%	23%
Spend time with partner	7%	23%
Rest, slow down the pace of life	8%	22%
Visit a beautiful destination	6%	21%
Contact with nature	4%	20%
Visit a town, the capital	6%	18%

## VISITING COUNTRIES – TOP 10:

France	33%	46%
Spain	36%	45%
Austria	34%	45%
Italy	28%	36%
Turkey	14%	31%
Croatia	22%	29%
Greece	19%	28%
Switzerland	15%	24%
United Kingdom	18%	24%
Non-European countries	17%	24%
Slovenia	9%	24%

Repeated visit  
Visit

## NOTES:

The results represent the subsample in the target group: they travel abroad at least once a year for a break or holiday and have already visited Slovenia, whereby short and non-tourist visits are also observed. / CHARACTERISTICS OF VISITORS TO SLOVENIA: The size and share show the size of the subsample (visitors to Slovenia) according to the population aged between 18 and 65. / TRAVELLING WITH: people with whom they travel. / DESTINATION TYPE – TOP 10: what type of destination is chosen. / ACTIVITIES – TOP 10: what do they do. / TRAVEL MOTIVES – TOP 10: what are their purposes for travelling (the main one and other reasons). / VISITING COUNTRIES: which countries they have visited so far and would visit again (Top 10, compared with Slovenia).

# GERMANY: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia



## TYPE OF ACCOMMODATION:



77%



53%



27%

Other frequent accommodation types:

**Boutique hotel: 25%**

**Relatives, friends: 22%**

**Private accommodation: 21%**

## RESERVATION

**UP  
TO 3  
months in  
advance**

**80%**

## TRANSPORT MODE (%):

AIRPLANE



58

-

CAR



29

76

MOTORHOME



5

11

COACH



3

24

MOTORCYCLE



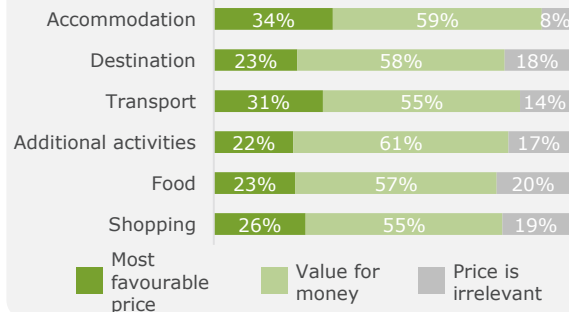
3

13

□ To the destination

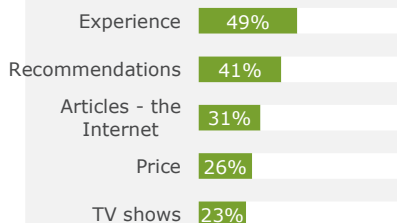
■ At the destination (16% TRAIN, 14% ON FOOT, 12% BICYCLE)

## PRICE SENSITIVITY:

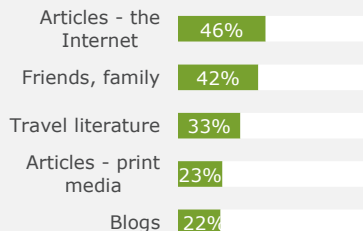


## PURCHASE JOURNEY:

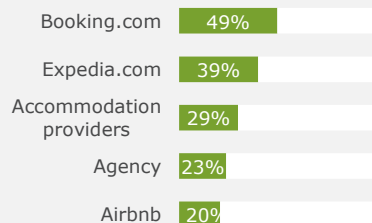
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€69	€72
TRANSPORT per person	€148	€155

### NOTES:

The results represent the subsample in the target group: they travel abroad at least once a year for a break or holiday and have already visited Slovenia, whereby short and non-tourist visits are also observed. / TYPE OF ACCOMMODATION: where they usually spend the night. / RESERVATION: how far in advance they book. / TRANSPORT MODE: how they travel to the destination and how they travel at the destination. / PRICE SENSITIVITY: level of attention paid to the price by elements. / PURCHASE JOURNEY: represents ordinary motivations which excite about the destination of the trip, information sources about the destination and reservation methods. / BUDGET AND SPENDING: shows the costs of transport per person and all other costs relating to the accommodation, food and activities per person per day.

# GERMANY: General travel habits and motives

Subsample: tourists in Slovenia



## CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size	<b>991,753</b>	Spring	<b>26%</b>
Proportion	<b>1.9%</b>	Summer	<b>52%</b>
Age	<b>40</b>	Shorter trips	<b>3</b>
Women	<b>44%</b>	Longer trips	<b>2</b>

## TRAVELLING WITH:

As a couple	<b>39%</b>
Family	<b>32%</b>
Friends	<b>18%</b>
Alone	<b>11%</b>

## DESTINATION TYPE:

By the sea	<b>44%</b>	<b>29%</b>	<b>73%</b>
Towns	<b>11%</b>	<b>52%</b>	<b>63%</b>
In the mountains	<b>13%</b>	<b>40%</b>	<b>52%</b>

**5x**  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sun and sea	<b>66%</b>
Sightseeing of a town, the capital	<b>63%</b>
Tourist attractions	<b>57%</b>
Sightseeing of old town centres	<b>56%</b>
Nature parks, attractions	<b>47%</b>
Live like a local	<b>45%</b>
Gastronomic pleasures	<b>44%</b>
History and castles	<b>39%</b>
Sports activities	<b>39%</b>
Social events, festivals, other events	<b>34%</b>

## TRAVEL MOTIVES – TOP 10:

Experience another culture	<b>2%</b>	<b>41%</b>
Relaxation	<b>13%</b>	<b>36%</b>
To learn something new	<b>13%</b>	<b>32%</b>
Enjoy good food, drinks	<b>2%</b>	<b>30%</b>
Retreat from everyday life	<b>4%</b>	<b>29%</b>
Visit a beautiful destination	<b>7%</b>	<b>25%</b>
Contact with nature	<b>10%</b>	<b>25%</b>
Experience diversity	<b>7%</b>	<b>20%</b>
Take care of oneself, be restored	<b>6%</b>	<b>20%</b>
Spend time with partner	<b>6%</b>	<b>18%</b>

## VISITING COUNTRIES – TOP 10:

Slovenia	<b>61%</b>	<b>100%</b>
Austria	<b>59%</b>	<b>72%</b>
Spain	<b>56%</b>	<b>68%</b>
France	<b>54%</b>	<b>66%</b>
Croatia	<b>53%</b>	<b>57%</b>
Italy	<b>37%</b>	<b>52%</b>
Turkey	<b>20%</b>	<b>46%</b>
Czechia	<b>36%</b>	<b>46%</b>
Switzerland	<b>36%</b>	<b>43%</b>
Netherlands	<b>27%</b>	<b>38%</b>

■ Repeated visit  
■ Visit

## NOTES:

The results represent the subsample in the target group: they travel abroad at least once a year for a break or holiday, their destinations also include Slovenia. / CHARACTERISTICS OF TOURISTS IN SLOVENIA: The size and share show the size of the subsample (tourists in Slovenia) according to the population aged between 18 and 65. / TRAVELLING WITH: people with whom they travel. / DESTINATION TYPE – TOP 10: what type of destination is chosen. / ACTIVITIES – TOP 10: what do they do. / TRAVEL MOTIVES – TOP 10: what are their purposes for travelling (the main one and other reasons). / VISITING COUNTRIES: which countries they have visited so far and would visit again (Top 10).

# GERMANY: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia



## TYPE OF ACCOMMODATION:



81%



52%



33%

Other frequent accommodation types:

**Relatives, friends: 27%**

**Private accommodation: 24%**

**Hostel: 24%**

## RESERVATION

**UP  
TO 3  
months in  
advance**

**76%**

## TRANSPORT MODE (%):

AIRPLANE



48

CAR



45

74

TRAIN



2

13

MOTORHOME



2

11

COACH



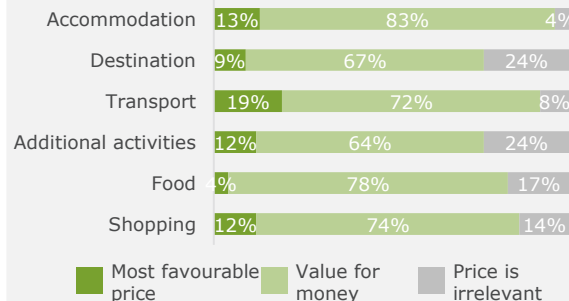
2

34

■ To the destination

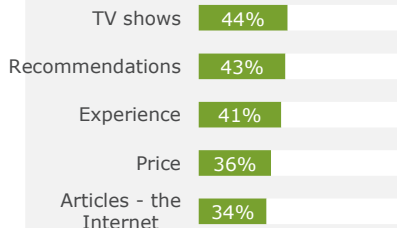
■ At the destination (22% ON FOOT, 11% MOTORCYCLE, 6% BICYCLE)

## PRICE SENSITIVITY:

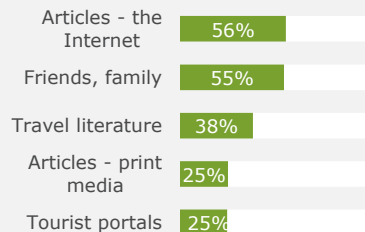


## PURCHASE JOURNEY:

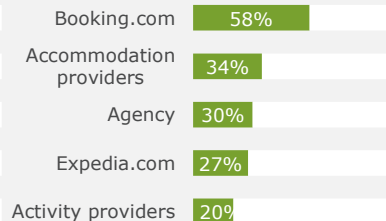
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	€52	€55
	in SLO	€44	€45
TRANSPORT per person	in Europe	€125	€132
	in SLO	€111	€124

## NOTES:

The results represent the subsample in the target group: they travel abroad at least once a year for a break or holiday, their destinations also include Slovenia. / TYPE OF ACCOMMODATION: where they usually spend the night. / RESERVATION: how far in advance they book. / TRANSPORT MODE: how they travel to the destination and how they travel at the destination. / PRICE SENSITIVITY: level of attention paid to the price by elements. / PURCHASE JOURNEY: represents ordinary motivations which excite about the destination of the trip, information sources about the destination and reservation methods. / BUDGET AND SPENDING: shows the costs of transport per person and all other costs relating to the accommodation, food and activities per person per day.

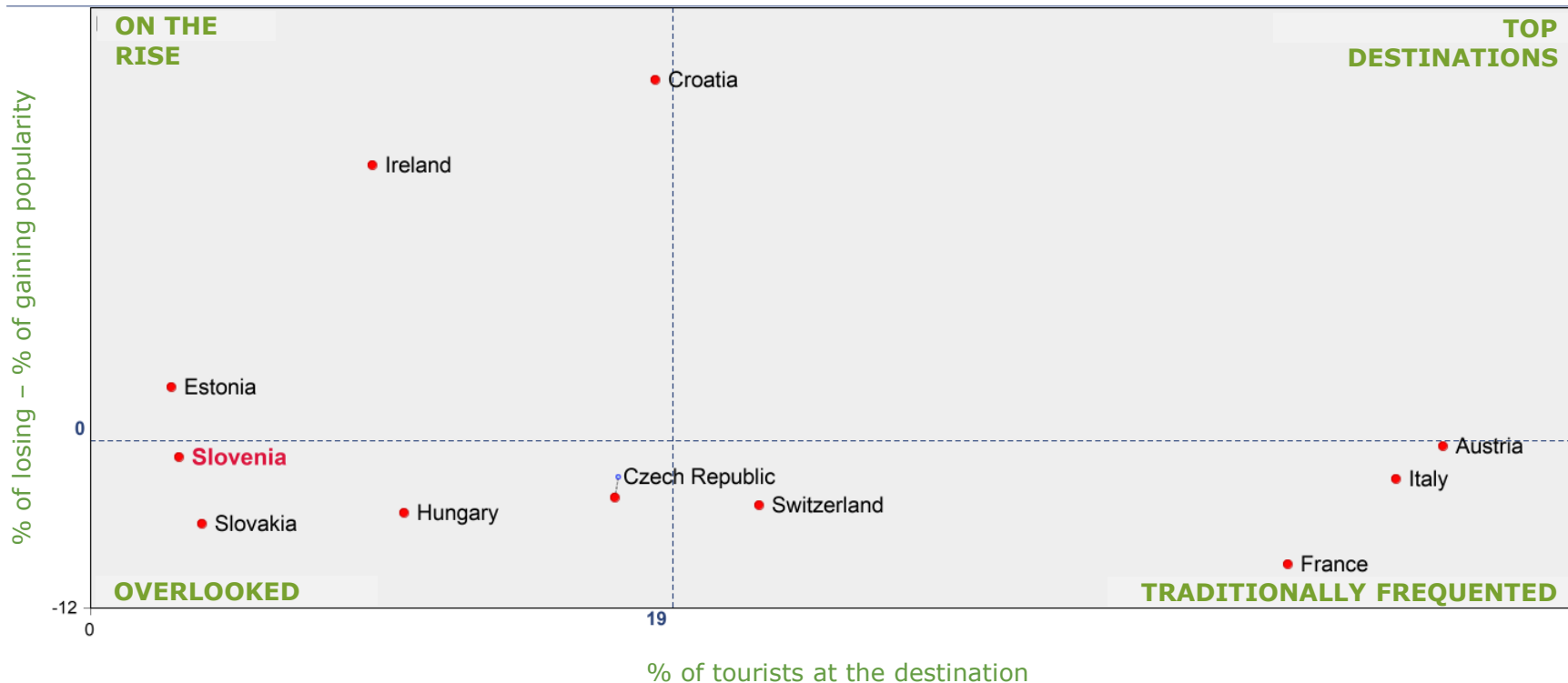


# **IMAGE AND PERCEPTION OF SLOVENIA**



# GERMANY: Destination relevance

Share of visitors by popularity of the destination



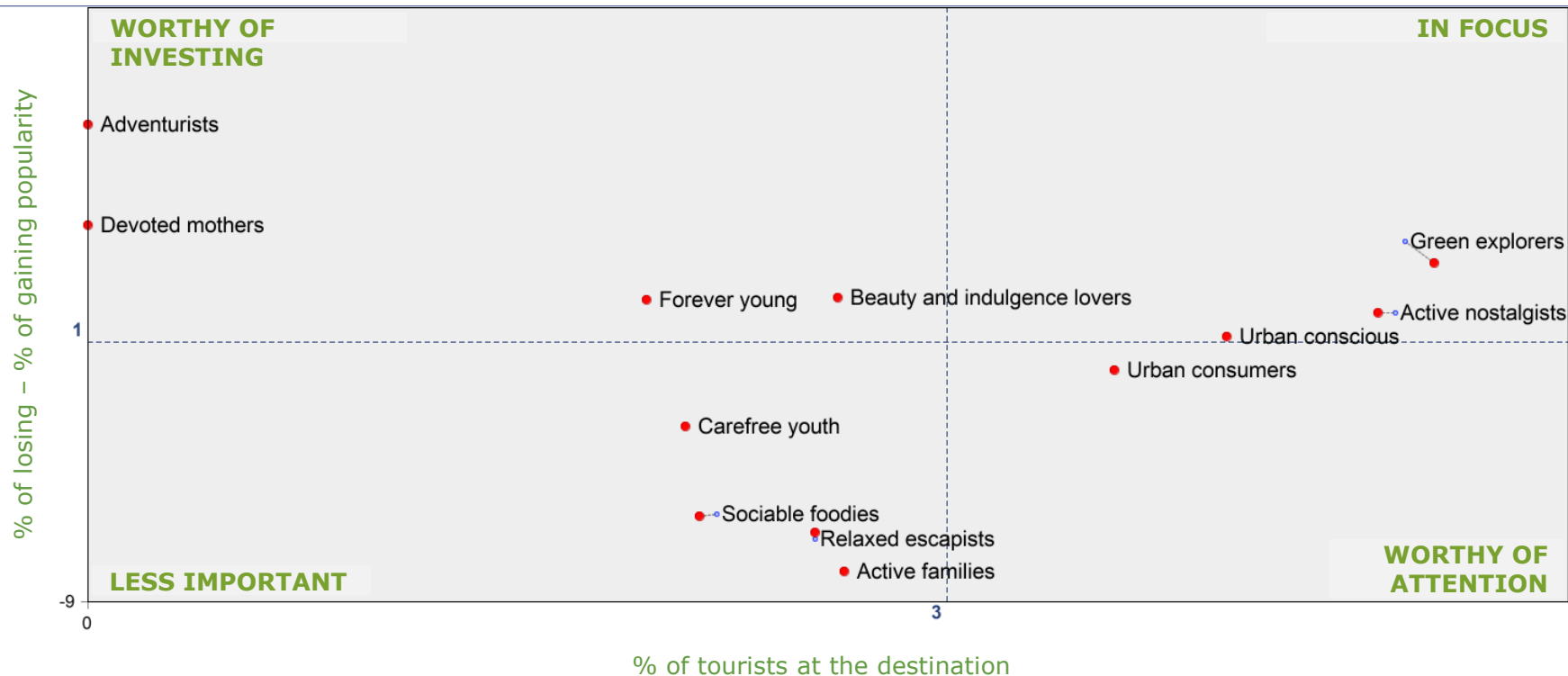
## NOTES:

The chart shows the share of visitors according to the ratio of gaining – losing popularity (destination % losing – % gaining).

The percentage of tourists at the destination shows the visitor frequency of the destination (the largest shares of tourists are at destinations in the right quadrant).

# GERMANY: Slovenia's relevance

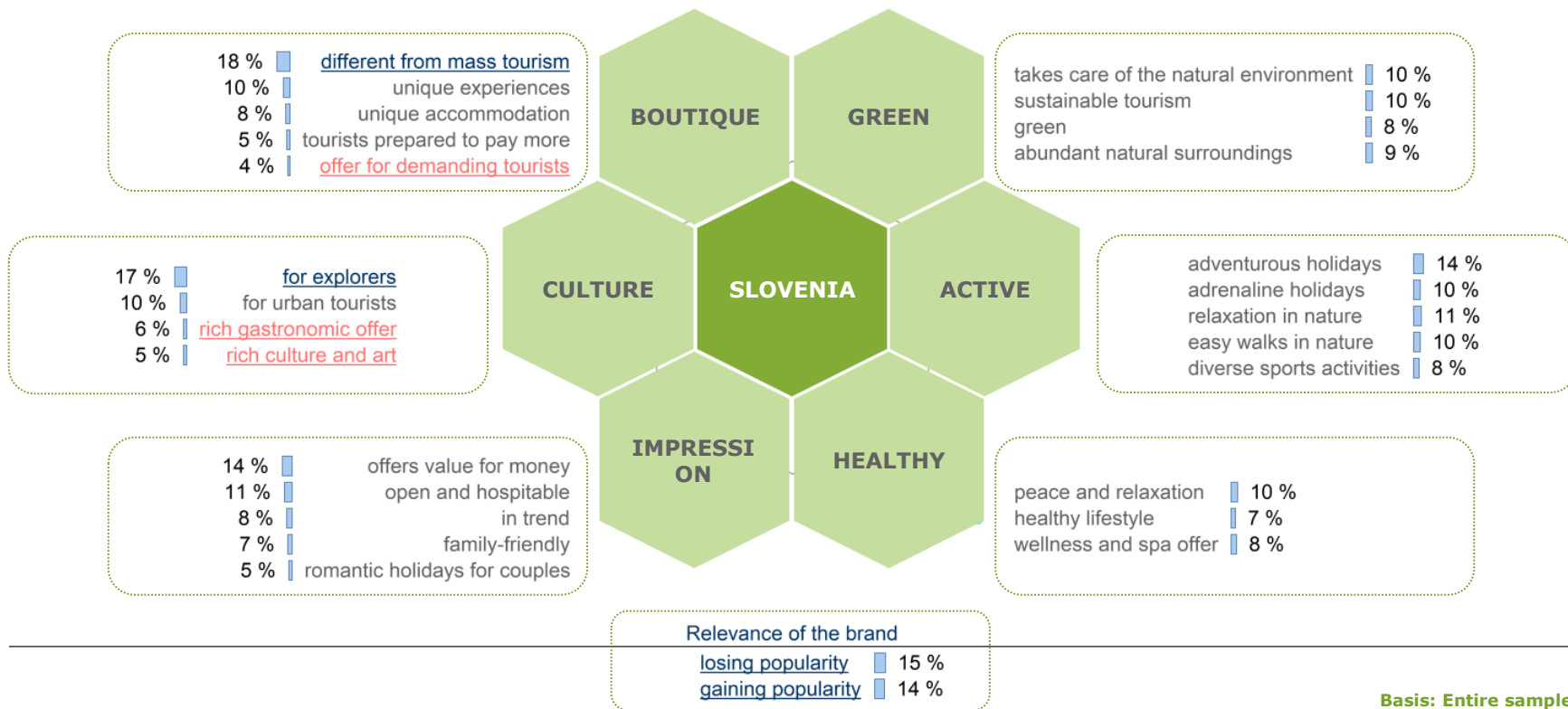
Slovenia's relevance as a tourist destination according to the popularity by segments of tourists



**NOTES:**

The chart shows the share of visitors according to the ratio of gaining – losing popularity (destination % losing – % gaining).  
The percentage of tourists at the destination shows the visitor frequency of the destination (the largest shares of tourists are at destinations in the right quadrant).

# GERMANY: Slovenia's image



Basis: Entire sample

## NOTES:

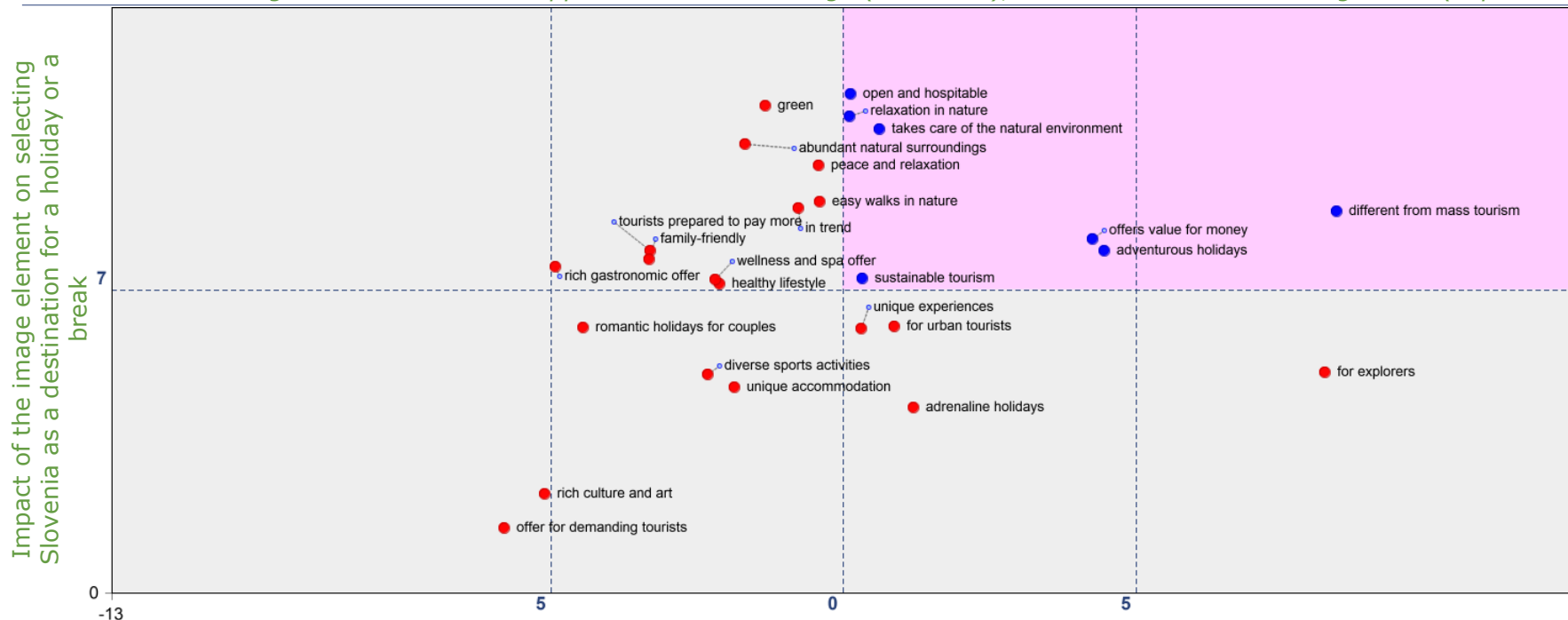
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and marked blue, while the elements deviating statistically significantly in a negative way are marked red.

# GERMANY: Significance of elements

Impact of elements on selecting Slovenia as a destination for a holiday or a break



*\*interesting elements are in the upper section of the image (influential), the best ones are on the right side (important)*



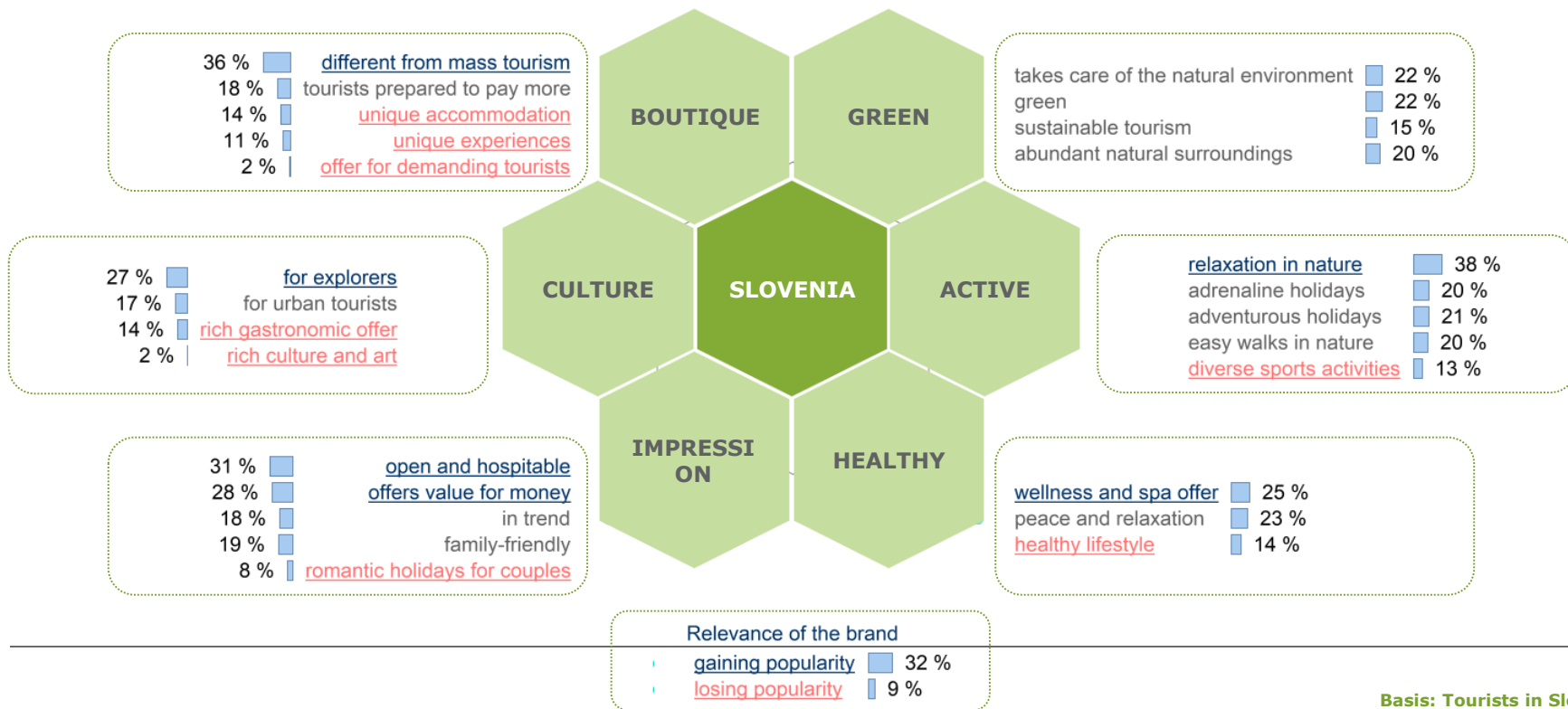
Weaker association of Slovenia ← → Stronger association of Slovenia

## NOTES:

Guidelines for interpretation: elements in the upper right quadrant have a strong impact on the destination's image. These are the elements which influence an individual's decision to spend a holiday at a destination. The upper middle quadrant represents new opportunities.

# GERMANY: Image

*Subsample: tourists in Slovenia*



**Basis: Tourists in Slovenia**

## NOTES:

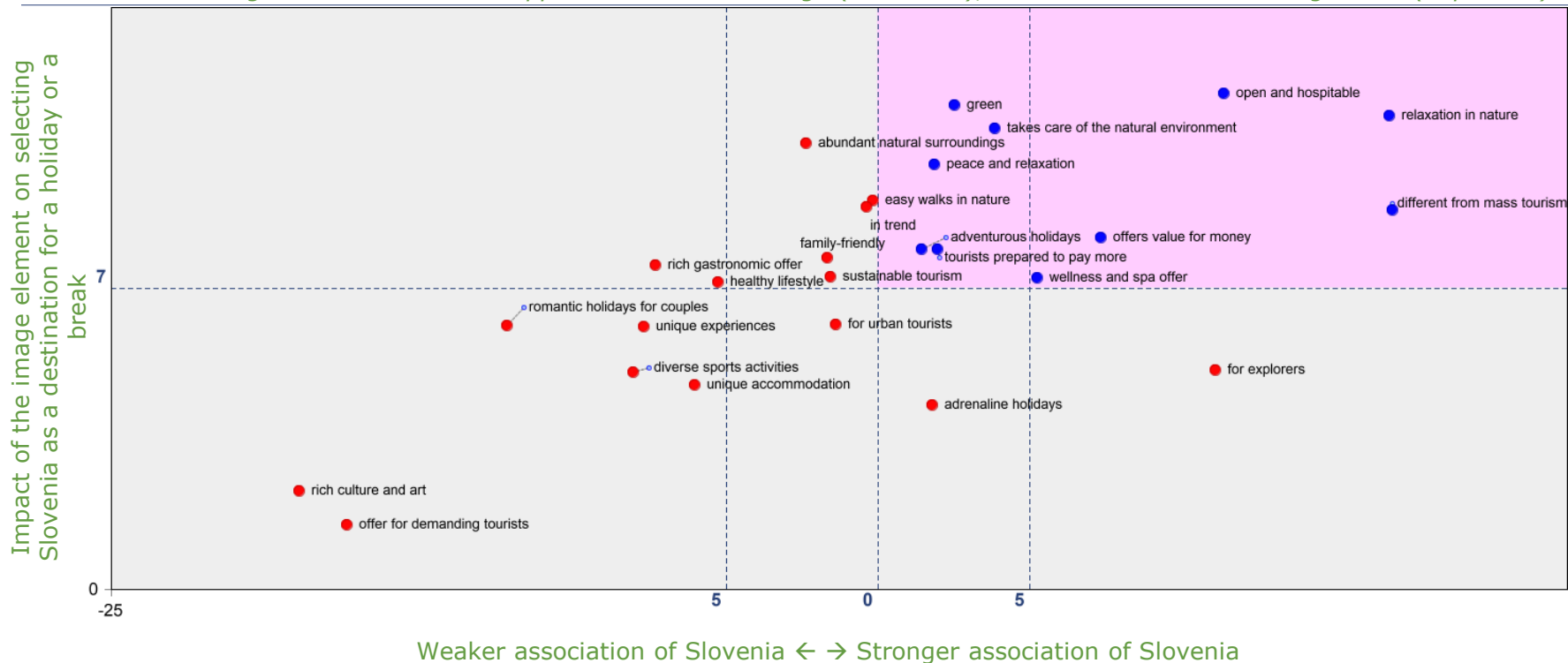
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and marked blue, while the elements deviating statistically significantly in a negative way are marked red.

# GERMANY: Significance of elements

Impact of elements on selecting Slovenia as a destination for a holiday or a break  
Subsample: tourists in Slovenia



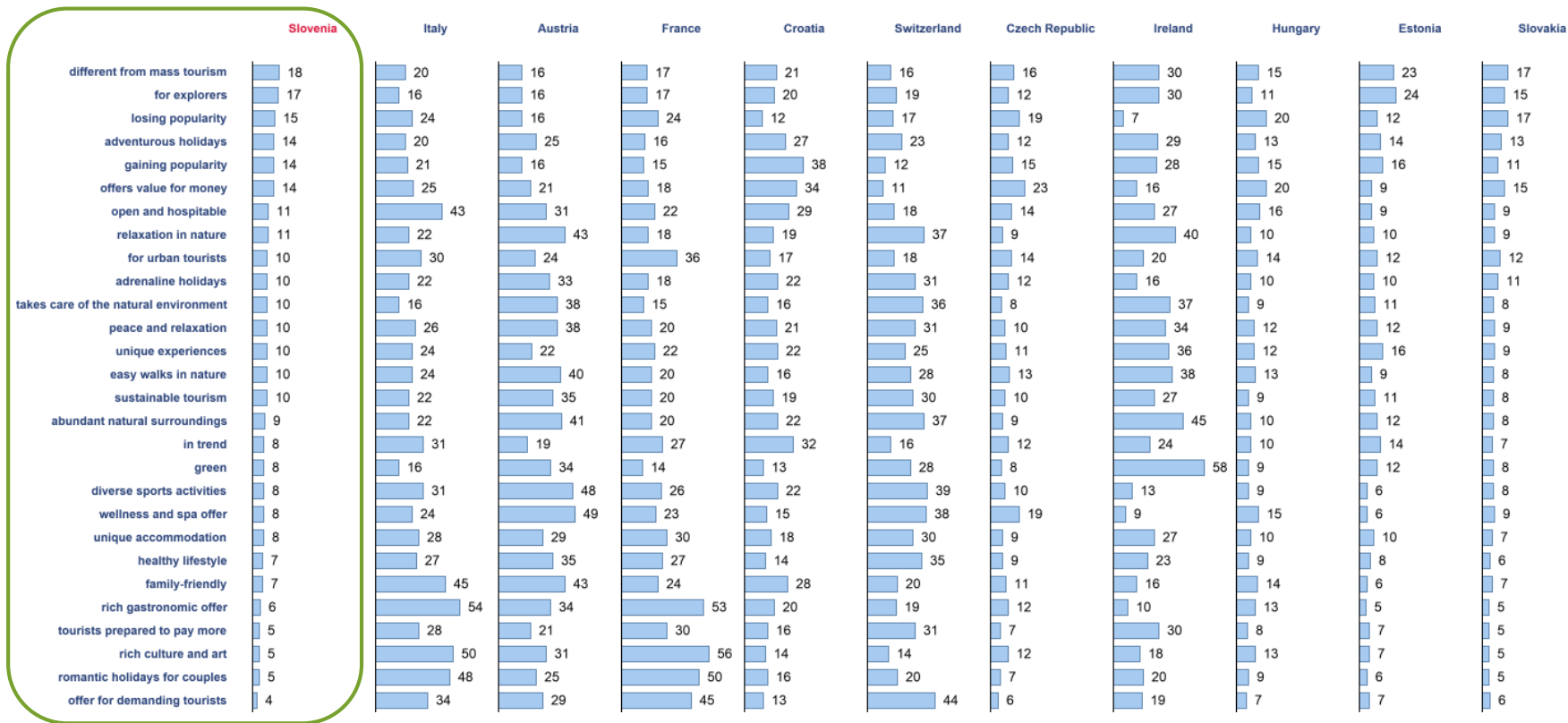
\*interesting elements are in the upper section of the image (influential), the best ones are on the right side (important)



## NOTES:

Guidelines for interpretation: elements in the upper right quadrant have a strong impact on the destination's image. These are the elements which influence an individual's decision to spend a holiday at a destination. The upper middle quadrant represents new opportunities.

# GERMANY: Destination image

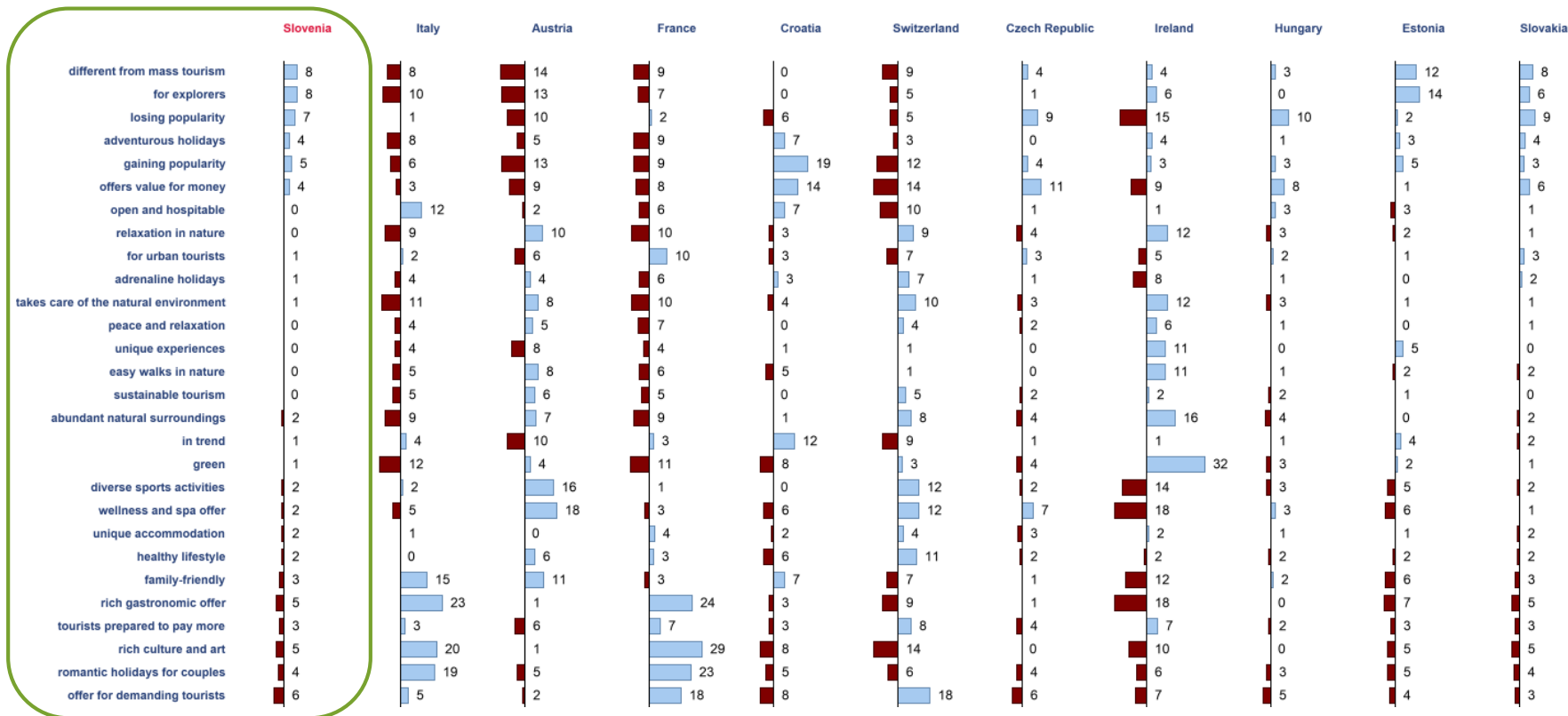


**NOTES:**

Deviations from the theoretical value for each element are shown. The positive deviation to the right (blue) means that the element is more typical of this destination as per the remaining destinations. The negative deviation to the left (red) means that the element is less typical of this destination as per the remaining destinations. The elements are classified according to the characteristics for Slovenia.



# GERMANY: Typical elements of destinations



**NOTES:**

Deviations from the theoretical value for each element are shown. The positive deviation to the right (blue) means that the element is more typical of this destination as per the remaining destinations. The negative deviation to the left (red) means that the element is less typical of this destination as per the remaining destinations. The elements are classified according to the characteristics for Slovenia.

# **SLOVENIA: KNOWLEDGE, EXPERIENCE AND RECOMMENDATIONS**

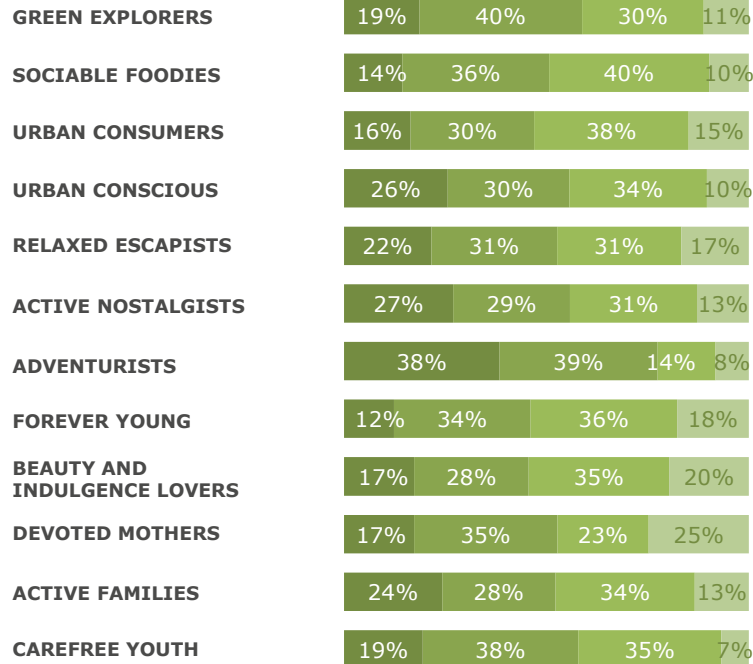


# GERMANY: Knowledge of, and experience with, Slovenia



## KNOWLEDGE OF SLOVENIA

Basis: sample

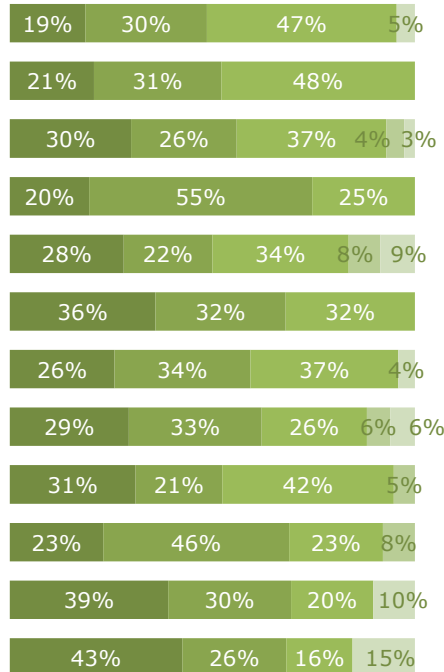


Knowledge:



## SATISFACTION

Basis: visitors to Slovenia

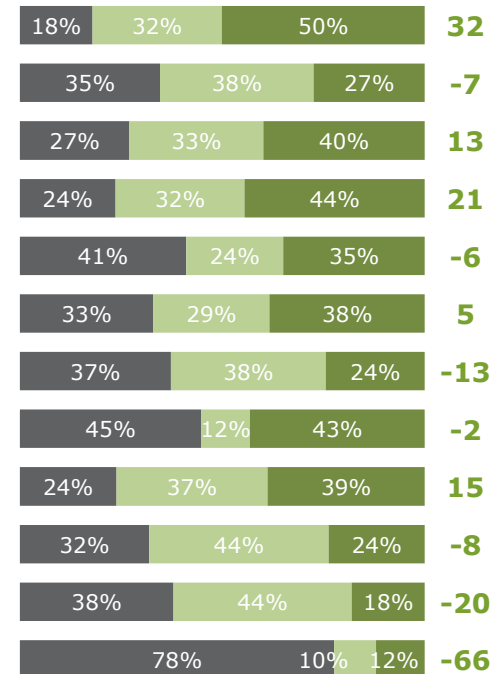


Meeting of expectations:



## NPS – DEGREE OF RECOMMENDATION

NPS Index



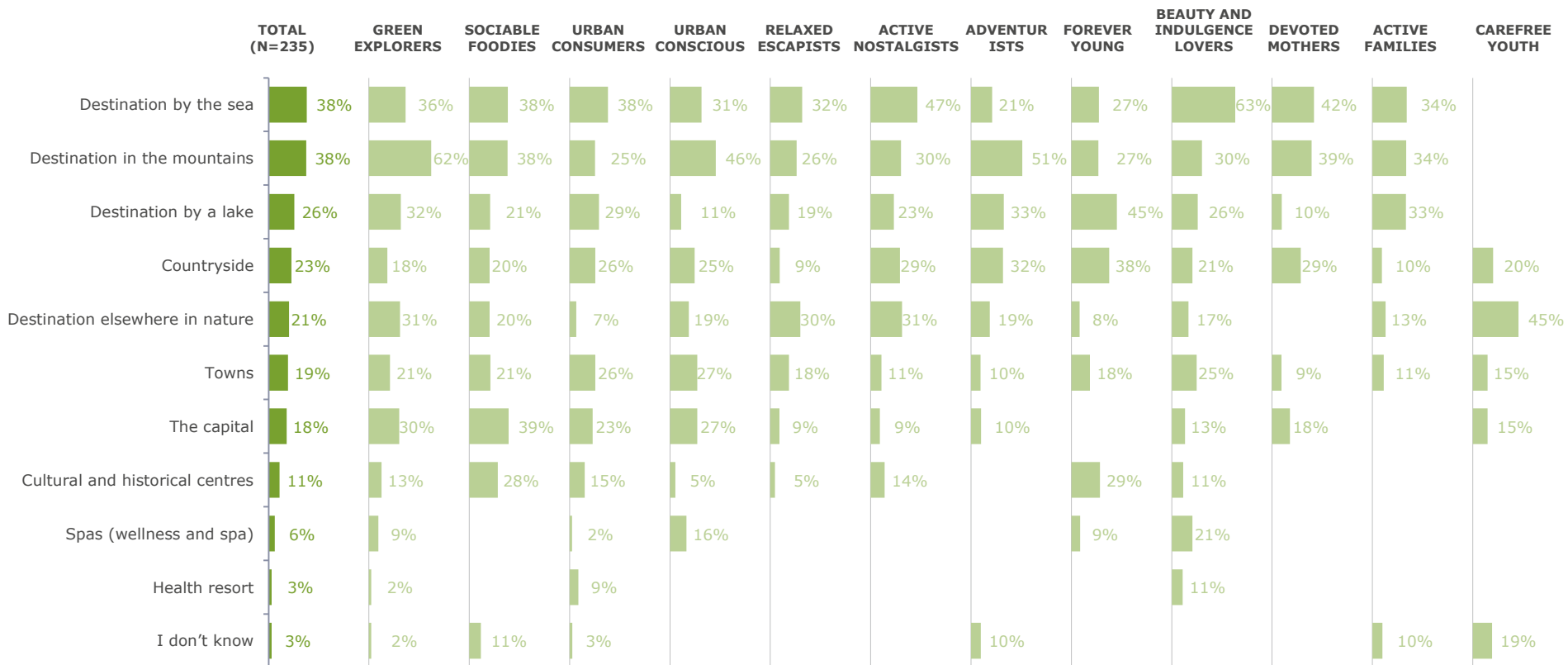
Recommendations:



**NOTE:** The gossipers represent values from 0 to 6, neutral from 7 to 8, and promoters from 9 to 10 (recommend the country). The NPS Index is the share of promoters minus the share of gossipers, and reveals the level of loyalty.

# GERMANY: Destination type in Slovenia

Subsample: visitors to Slovenia

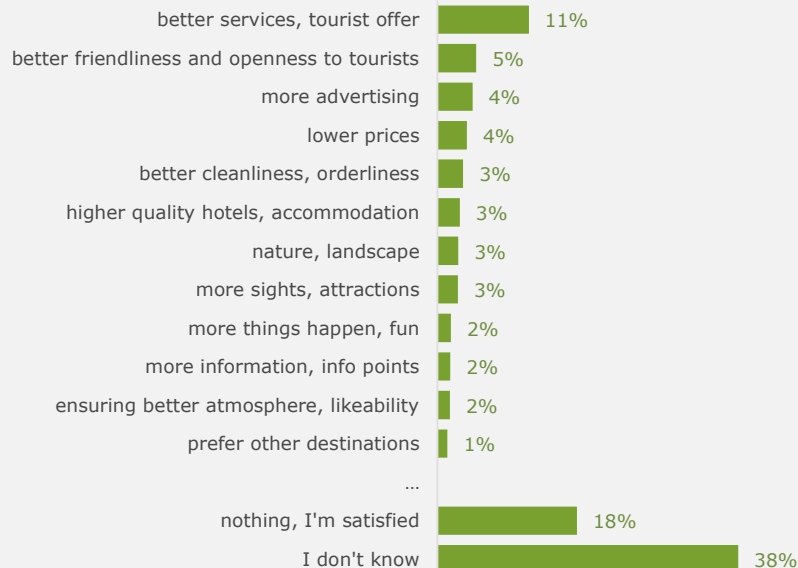


## NOTES:

Replies are presented on a subsample of visitors to Slovenia who would visit it again. The chart includes types of tourist destinations which visitors to Slovenia would choose if they visit it again. Several replies were possible.

## Opportunities for improvement – Top 12

*Gossipers and neutral (would not recommend Slovenia), n=184*

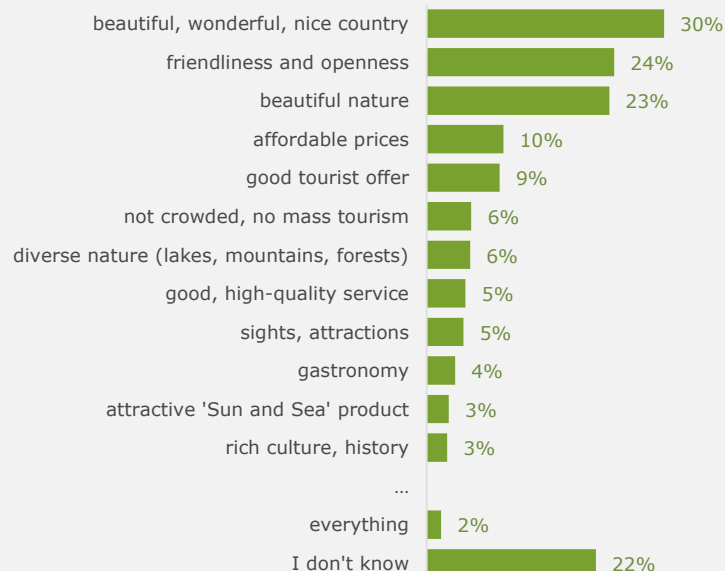


### NOTES:

OTHER STATEMENTS: lower cost/abolishment of vignettes, more sports activities, different social and political attitude, Better transport infrastructure, connections, modernisation, gastronomy, I'm not familiar enough, preservation of safety, knowledge of foreign languages, unattractiveness of the 'sun and sea' product

## Elements of excitement – Top 12

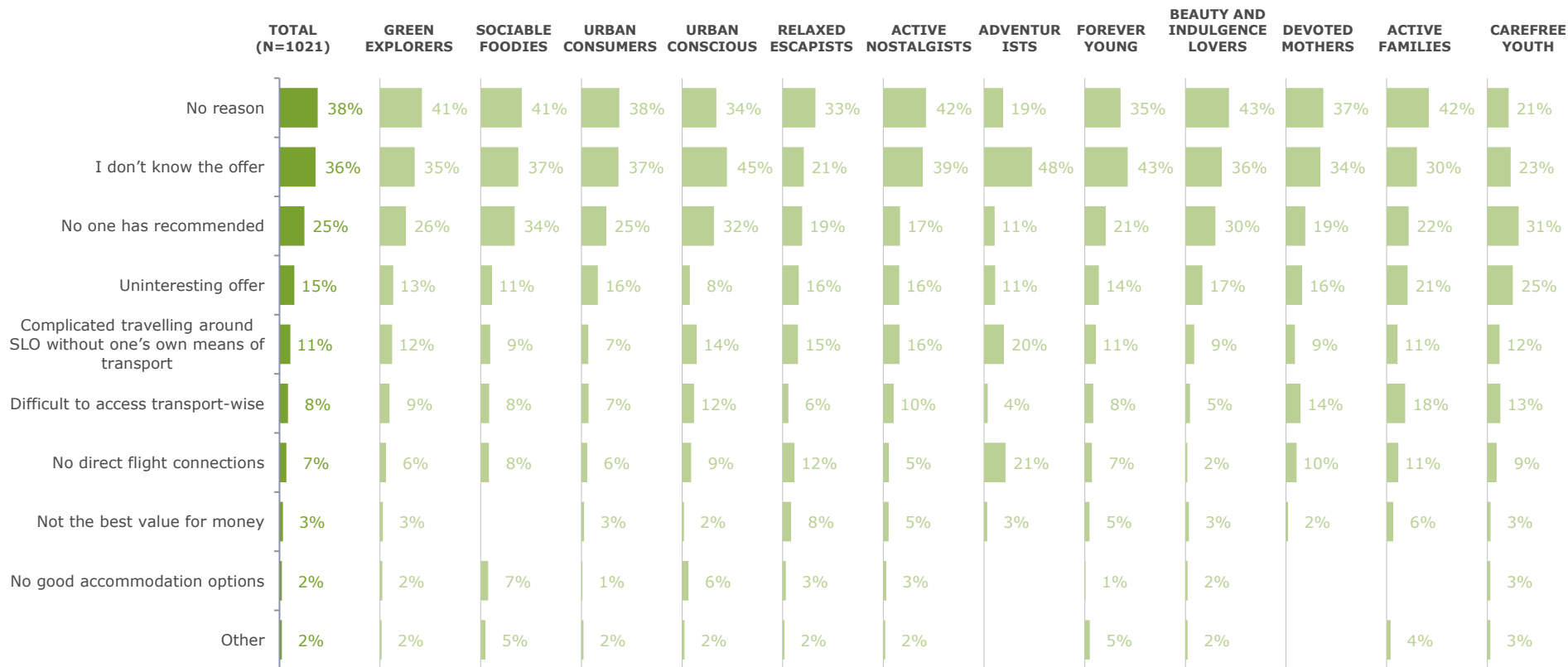
*Promoters (would recommend Slovenia), n=110*



### NOTES:

OTHER STATEMENTS: proximity, location, pleasant, fun atmosphere, suitable for rest and relaxation, accommodation, cleanliness and orderliness, easy communication

## GERMANY: Reasons for not visiting



## NOTES:

Replies are presented on the subsample of those who replied in the survey that they knew Slovenia or had at least heard of it but had not visited it yet (subsample: non-visitors). The replies provide reasons why they have not visited Slovenia. Several replies were possible.

# ATTACHMENTS





## Additional explanations

The **sizes of target groups** and **segments** (absolute values) were calculated on the basis of **data on population** in countries on 1 January 2016\*:

Country	Entire population*	Population aged between 18 and 65*
Austria	8,690,100	5,574,356
France	66,760,000	39,372,128
Italy	60,665,600	37,287,764
Germany	82,175,700	51,549,829
Netherlands	16,979,100	10,477,231
Poland	37,967,200	25,060,599
Russia	143,973,300	97,436,838
UK	65,382,600	39,850,721

When calculating expenditure of tourists, the **currency conversion** on 30 November 2017 was used\*\*:

- **UK:** GBP 1 = EUR 1,13041
- **Poland:** PLN 1 = EUR 0,23793
- **Russia:** RUB 1 = EUR 0,01442

\*Source: <http://ec.europa.eu/eurostat>

\*\*Source: <https://www.oanda.com/currency/converter/>





## Key for icons

### TYPE OF ACCOMMODATION



**Apartment**



**Hostel**



**Hotel**



**Boutique  
hotel**



**Private  
accommodation**



**Camp**



**Relatives or  
friends**

### TRANSPORT MODE



**Aeroplane**



**Car**



**Bicycle**



**Walking**



**Public  
transport  
(bus)**



**Public  
transport  
(train)**



**Motorhome**



**Motorcycle**

## GERMANY: Green explorers (17.2%)



Name of the persona representing a segment of tourists in the country. The percentage represents the share of the persona in comparison with all tourists in the country.



## DESTINATION TYPE

Cities	79%	+30
Beach	21%	+15

Question: What type of destination do you usually choose for your break, holiday or trip?

TYPE OF  
ACCOMMODATION

Apartment	73%	+23
Hotel	27%	+15

Question: What type of accommodation do you usually seek for your break, holiday or trip?  
(Classification of up to 5 replies)

TRANSPORT TO THE  
DESTINATION

Car	33%	+4
Train	5%	+8

Question: What means of transport do you most frequently use to travel to a destination?

TRANSPORT AT THE  
DESTINATION

Train	25%	+8
Car	5%	+8

Question: How do you usually travel from one point to another at a destination?

## ACTIVITIES

Sightseeing of old town centres	81%	+30
Natural sightseeing	76%	+26

Question: What type of destination do you usually choose for your break, holiday or trip?

## MOTIVATION

Recommendations from friends	50%	+9
TV programs	31%	+7

Question: What type of destination do you usually choose for your break, holiday or trip?

## SOURCE OF INFORMATION

Articles on the Internet	65%	+12
Friends, family	54%	+7

Question: What type of destination do you usually choose for your break, holiday or trip?

## RESERVATION METHOD

Booking.com	51%	+10
Directly at the accommodation provider	39%	+10

Question: What type of destination do you usually choose for your break, holiday or trip?

## TRAVELLING WITH

As a couple	51%	+3
Alone	11%	+3

Question: What type of destination do you usually choose for your break, holiday or trip?

## CHARACTERISTICS:

Size*	9,372,039
Share*	11%
Age	42
Women	54%

Spring	20%
Summer	64%
Shorter trips	2
Longer trips	2

## NOTES:

Percentages in the title show the share of the segment according to the entire target group (they travel abroad for a break or holiday). / DATA IN TABLES: positive and statistically significant differences are bold and underlined. The first number shows the percentage of replies for an individual element, and the second number reveals the deviation in percentage points from the entire target group in the country. / CHARACTERISTICS: \*The size and share show the size of the segment according to the population aged between 18 and 65.

## GERMANY: Elements of the purchase journey and consumption



The "Subsample" subtitle denotes which subsample the results are shown for. When the subsample is not provided, the results are shown for the entire target group.

TYPE OF  
ACCOMMODATION:

Top 3 most frequent accommodation types are shown in icons. Less frequent accommodation types are given in the text.

Question: What type of accommodation do you usually seek for your break, holiday or trip?

Classify according to your most towards your least frequent accommodation type. (several replies)

## RESERVATION

Question: How far in advance do you usually book your break, holiday or trip in Europe? The data show the most frequently stated response and also include all other temporally shorter statements.

## TRANSPORT MODE (%):

AIRPLANE



60

TRAIN MOTORHOME COACH



2 29

Question: What means of transport do you most frequently use to travel to a destination/How do you usually travel from one point to another at a destination of your break, holiday or trip?



To the destination



At the destination (23% ON FOOT, 9% BICYCLE, 5% MOTORCYCLE)

## PRICE SENSITIVITY:

Accommodation 73% 6%

Question: Assess how important price is for you when choosing individual elements of your break, trip or holiday in Europe.

Additional

Food 16% 67% 17%

Shopping 20% 65% 15%

Most favourable price

Value for money

Price is irrelevant

## PURCHASE JOURNEY:

## MOTIVATION

## SOURCES OF

## RESERVATION METHOD:

Top 5 replies – Questions: What stimulates your interest the most in a destination when you start thinking about/Where do you look for information when you want to educate yourself about a certain destination of/How do you usually book your break, holiday or trip in Europe? (several replies)

Articles - the Internet

31%

Travel literature

29%

Expedia.com

28%

Price

26%

Tourist portals

22%

Agency

23%

TV shows

23%

Articles - print media

16%

Airbnb

15%

## BUDGET AND SPENDING:

## PLANNED

## ACTUAL

Question: Think about your last holiday or break in Europe/stay in Slovenia (subsample: tourists in Slovenia) where you spent at least two nights and assess

the planned and actual costs of your trip. The costs are calculated per person on the basis of additional verification of the number of persons and the number of days the trip lasted.

## NOTES:

The results represent the target group: everyone who travels abroad at least once a year for a break or holiday. The data refer to trips to European destinations. / CHARACTERISTICS OF THE TARGET GROUP: The size and share show the size of the target group according to the population aged between 18 and 65. / TRAVELLING WITH: people with whom they travel. / DESTINATION TYPE: what type of destination is chosen. / ACTIVITIES – TOP 10: what do they do. / TRAVEL MOTIVES – TOP 10: what are their purposes for travelling (the main one and other reasons). / VISITING COUNTRIES: which countries they have visited so far and would visit again (Top 10, compared with Slovenia).

## GERMANY: General travel habits and motives



The 'Subsample' subtitle denotes which subsample the results are shown for. When the subsample is not provided, the results are shown for the entire target group.

## CHARACTERISTICS OF THE TARGET GROUP:

Size	54,351,21		18%
Proportion	66%		62%
Age	41		2
Women	48%	Longer trips	2

The data are calculated as per the size of the country's entire population.

## TRAVELLING WITH:

Question: With whom do you usually spend your break, holiday or trip?

Friends	12%
Alone	8%

## DESTINATION TYPE:

Top 3 – Question: What type of destination do you usually choose for your break, holiday or trip?

By a lake	7%	35%	42%
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4x

Frequency of travelling abroad irrespective of the length

## ACTIVITIES – TOP 10:

Top 10 – Question: What type of activities are important for you when going abroad for a break, holiday or trip? (several replies)

and sea	65%
Tourist attractions	48%
Shopping	40%
Gastronomic pleasures	37%
Live like a local	37%
History and castles	36%
Wellness and (beauty) spa	31%

## TRAVEL MOTIVES:

Top 10 TOM – Question: What is your main motive (which are the other) to go on a break, holiday or trip in Europe? (one main reply (TOM) and other replies)

Relaxation	13%	35%
Experience another culture	8%	26%
Visit a beautiful destination	7%	25%
Retreat from everyday life	7%	25%
Enjoy good food, drinks	3%	23%
Contact with nature	4%	18%
Clear one's head, gather thoughts	2%	15%

## VISITING COUNTRIES:

Top 10 – VISITING OF COUNTRIES AND THE INTENTION OF VISITING AGAIN, whereby a selection of European countries was provided in detail. – Question: In which countries have you stayed at least two nights for a break, holiday or trip? Would you revisit any of the countries in which you have already stayed? The replies were compared with Slovenia. (several replies)

Slovenia	41%	48%
Non-European countries	22%	28%
Turkey	13%	28%
Netherlands	19%	25%
United Kingdom	18%	23%
Switzerland	15%	22%
Slovenia	2%	4%

Repeated visit  
Visit

## NOTES:

The results represent the target group: everyone who travels abroad at least once a year for a break or holiday. The data refer to trips to European destinations. / TYPE OF ACCOMMODATION: where they usually spend the night. / RESERVATION: how far in advance they book. / TRANSPORT MODE: how they travel to the destination and how they travel at the destination. / PRICE SENSITIVITY: level of attention paid to the price by elements. / PURCHASE JOURNEY: represents ordinary motivations which excite about the destination of the trip, information sources about the destination and reservation methods. / BUDGET (planned costs) AND SPENDING (actual costs): costs of transport per person and all other costs relating to the accommodation, food and activities per person per day.



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