



# IDENTIFICATION OF MARKET POTENTIAL

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

ITALY

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)



2017 TOP 50  
INNOVATIVE  
COMPANY

RESEARCH NOW  
RANKED #6

# METHODOLOGY



# Methodological framework of the survey



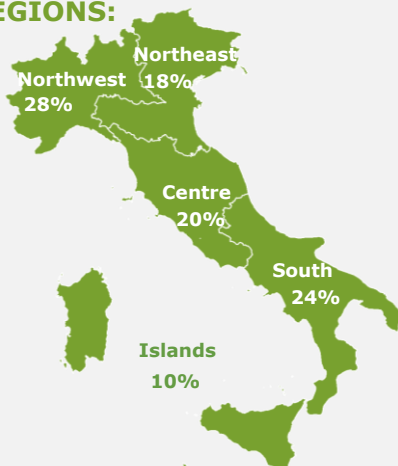
<b>Method of implementation</b>	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
<b>Country of implementation</b>	Italy
<b>Implementation period</b>	22 November – 27 November 2017
<b>Target group</b>	Citizens of a certain 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>	<p>Entire sample: n=2,323</p> <p>Target group: n=1,529</p> <p>Visitors to Slovenia: n=482</p> <p>Tourists in Slovenia: n=123</p>
<b>Representativeness</b>	<p>A target person was selected from the sample framework, which was representative of the population aged between 18 and 65.</p> <p>The data were weighted according to gender, age and region.</p>
<b>Survey length</b>	Average duration of the survey: t=14:56.



# ITALY: Sample demographics



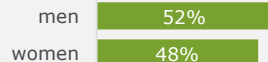
## REGIONS:



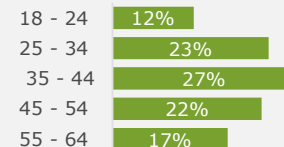
### DETAILED DEFINITION OF REGIONS:

**Northeast:** Emilia Romagna, Friuli Venezia Giulia, Trentino Alto Adige, Veneto. **Northwest:** Liguria, Lombardy, Piedmont, Valle d'Aosta. **Centre:** Lazio, Marche, Tuscany, Umbria. **South:** Abruzzo, Basilicata, Calabria, Campania, Molise, Apulia. **Islands:** Sardinia, Sicily.

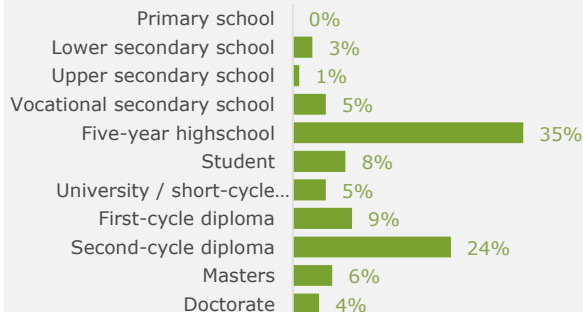
## GENDER:



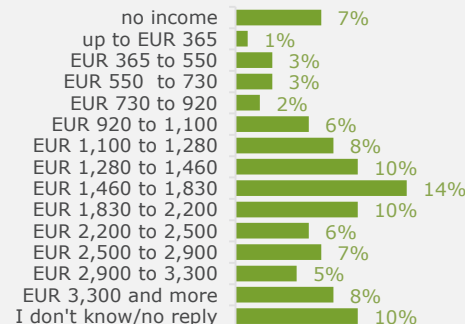
## AGE:



## EDUCATION:



## PERSONAL INCOME:





# Sample shares and sizes



*Bordered ellipses show the basis for share calculations.*



Basis: ITALY 18-65 year-olds	
POPULATION (18-65 YEARS)	100.0%
TARGET GROUP	66.2%
VISITORS TO SLOVENIA	20.8%
TOURISTS IN SLOVENIA	5.3%

Basis: TARGET GROUP	
POPULATION (18-65 YEARS)	/
TARGET GROUP	100.0%
VISITORS TO SLOVENIA	32.0%
TOURISTS IN SLOVENIA	8.0%

Absolute size*	
	37,287,764
	24,672,253
	7,742,854
	1,971,693

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

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



# ITALY: Size of the potential



Top choice

0,9%

**NARROW  
POTENTIAL**  
Top choice +  
repeated visit

3%

12%

**BROAD  
POTENTIAL**  
Choice

7%

23%

Visit or choice

13%

13%

ITA

n=1536

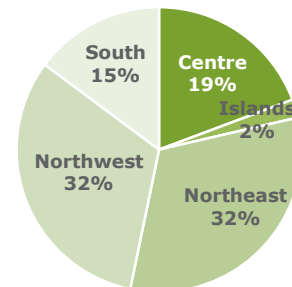
## NARROW POTENTIAL:

3%

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>722,370</b>
Centre	139,450
Islands	15,061
Northeast	230,152
Northwest	230,649
South	107,057

## REGIONAL CLASSIFICATION:



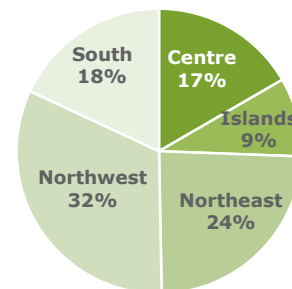
## BROAD POTENTIAL:

7%

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>1,841,143</b>
Centre	306,351
Islands	164,832
Northeast	443,967
Northwest	593,309
South	332,683

## 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.

## ITALY: Size of segments by regions



## URBAN CONSUMERS:

20.0%

4,923,623



## GREEN EXPLORERS:

17.1%

4,221,262



## SOCIALE FOODIES:

12.2%

3,004,703

	Total	Centre	Islands	Northeast	Northwest	South	
%	100.0%	19.8%	10.3%	18.1%	28.1%	23.7%	
Size	24,672,253	4,882,576	2,548,701	4,460,760	6,944,153	5,836,063	
GREEN EXPLORERS	%	17.1%	21.4%	11.6%	17.4%	29.2%	20.5%
Size	4,221,262	901,786	489,549	736,005	1,230,670	863,251	
SOCIALE FOODIES	%	12.2%	22.5%	9.7%	20.0%	26.7%	21.1%
Size	3,004,703	675,343	292,255	600,184	801,991	634,931	
URBAN CONSUMERS	%	20.0%	20.6%	12.8%	16.5%	23.8%	26.4%
Size	4,923,623	1,013,400	630,099	810,570	1,169,928	1,299,627	
URBAN CONSCIOUS	%	9.5%	15.9%	12.8%	18.9%	29.6%	22.8%
Size	2,346,534	372,646	301,407	443,913	694,334	534,235	
RELAXED ESCAPISTS	%	9.9%	16.9%	10.1%	19.9%	27.6%	25.5%
Size	2,436,721	411,891	245,796	485,375	673,345	620,313	
ACTIVE NOSTALGISTS	%	7.2%	19.3%	8.0%	21.3%	28.2%	23.2%
Size	1,783,782	344,120	143,436	379,468	502,792	413,965	
ADVENTURISTS	%	1.9%	8.9%	12.7%	17.7%	39.9%	20.8%
Size	478,616	42,399	60,683	84,893	191,177	99,464	
FOREVER YOUNG	%	7.5%	18.9%	6.4%	19.4%	32.3%	23.1%
Size	1,859,976	350,888	118,628	360,935	599,909	429,616	
BEAUTY AND INDULGENCE LOVERS	%	7.2%	18.7%	7.8%	14.5%	29.0%	30.0%
Size	1,776,903	333,065	139,368	257,573	514,537	532,360	
DEVOTED MOTHERS	%	2.8%	20.6%	8.1%	12.3%	40.8%	18.2%
Size	692,745	142,815	55,834	85,465	282,603	126,028	
ACTIVE FAMILIES	%	1.8%	19.2%	3.6%	23.0%	25.8%	28.4%
Size	440,187	84,676	15,752	101,227	113,475	125,057	
CAREFREE YOUTH	%	2.9%	29.1%	7.9%	16.6%	23.9%	22.5%
Size	707,200	205,992	55,595	117,417	168,762	159,434	

## 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	64%
Capitals	59%
Cities	46%
In the mountains	39%
Cultural and historical centres	38%

#### TYPE OF ACCOMMODATION

Hotel	79%
Apartment	49%
Boutique hotel	43%
Tourist farm	32%
Private accommodation (e.g. Airbnb)	28%

#### TRANSPORT TO THE DESTINATION

Aeroplane	74%
Car	18%
Motorhome (camper)	3%
Coach	2%
Train	2%

#### TRANSPORT AT THE DESTINATION

Car	68%
Coach	35%
Train	29%
On foot	18%
Motorcycle	6%

#### ACTIVITIES

Sightseeing of a town, the capital	64%
Sightseeing of old town centres	61%
Natural sights, nature	60%
Sun and sea	53%
History and castles	51%

#### MOTIVATION

Past experience	42%
Price of the destination	37%
Recommendations from friends	36%
Articles on the Internet	32%
Travel presentations	25%

#### SOURCE OF INFORMATION

Articles on the Internet	53%
Web portals (TripAdvisor etc.)	39%
Friends, family	38%
Travel literature	24%
Opinions in social media	23%

#### RESERVATION METHOD

Booking.com	64%
Expedia.com	31%
Agency	30%
Airbnb	21%
Directly at the accommodation provider	16%

#### TRAVELLING WITH

As a couple	44%
Family	30%
Friends	20%
Alone	5%
Relatives	1%

### CHARACTERISTICS:

Size*	<b>24,672,253</b>
Share*	<b>66%</b>
Age	<b>40</b>
Women	<b>48%</b>

Spring	<b>27%</b>
Summer	<b>60%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

## ITALY: Tourists in Slovenia (8.0%)



## DESTINATION TYPE

Capitals	71%	+12
By the sea	75%	+11
Cultural and historical centres	48%	+10
By a lake	33%	+10
In the mountains	44%	+5

## TYPE OF ACCOMMODATION

Apartment	55%	+6
Hotel	83%	+4
Private accommodation (e.g. Airbnb)	33%	+5
Tourist farm	35%	+3
Boutique hotel	44%	+1

## TRANSPORT TO THE DESTINATION

Car	28%	+11
Motorcycle	4%	+3
Motorhome (camper)	4%	+1
Aeroplane	60%	-14
Train	2%	+0

## TRANSPORT AT THE DESTINATION

Car	74%	+7
Motorcycle	9%	+2
Motorhome (camper)	7%	+3
Coach	26%	-9
Train	23%	-6

## ACTIVITIES

Sightseeing of old town centres	76%	+15
Seeing major tourist attractions	67%	+22
History and castles	65%	+14
Natural sights, nature	69%	+9
Sun and sea	63%	+10

## MOTIVATION

Price of the destination	42%	+5
Articles on the Internet	38%	+5
Past experience	47%	+5
Proximity of the destination	22%	+7
Recommendations from friends	40%	+4

## SOURCE OF INFORMATION

Web portals (TripAdvisor etc.)	47%	+8
Articles on the Internet	59%	+6
Friends, family	45%	+8
Travel literature	29%	+4
Web forums	27%	+4

## RESERVATION METHOD

Booking.com	75%	+10
Airbnb	27%	+6
Directly at the accommodation provider	23%	+7
Expedia.com	29%	-1
Agoda.com	7%	+0

## TRAVELLING WITH

Family	36%	+6
As a couple	41%	-3
Friends	19%	-2
Alone	4%	-1

## CHARACTERISTICS:

Size*	1,971,693
Share*	5%
Age	43
Women	38%

Spring	28%
Summer	55%
Shorter trips	3
Longer trips	2

## NOTES:

Percentages in the title show the share of the subsample 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 subsample according to the population aged between 18 and 65.

n=123

## ITALY: Urban consumers (20.0%)



## DESTINATION TYPE

By the sea	64%	+0
<b>Cities</b>	<b>62%</b>	<b>+16</b>
Capitals	58%	-1
Cultural and historical centres	30%	-8
Spas (wellness and spa)	14%	-2

## TYPE OF ACCOMMODATION

<b>Hotel</b>	<b>92%</b>	<b>+13</b>
Private accommodation (e.g. Airbnb)	29%	+1
Boutique hotel	35%	-7
Staying with relatives or friends	18%	-1
Own property (holiday cottage)	9%	+0

## TRANSPORT TO THE DESTINATION

<b>Aeroplane</b>	<b>81%</b>	<b>+7</b>
<b>Motorcycle</b>	<b>2%</b>	<b>+1</b>
Coach	1%	-1
Car	13%	-4
Ship or another vessel	1%	+0

## TRANSPORT AT THE DESTINATION

<b>Coach</b>	<b>39%</b>	<b>+3</b>
Train	29%	+1
Car	63%	-4
On foot	18%	+0
Bicycle	4%	-1

## ACTIVITIES

Shopping	59%	+25
Wellness and spa	51%	+19
Gastronomy	56%	+9
<b>Sightseeing of a town, the capital</b>	<b>70%</b>	<b>+5</b>
Sun and sea	59%	+6

## MOTIVATION

<b>Popularity of the destination</b>	<b>32%</b>	<b>+9</b>
Price of the destination	39%	+2
Past experience	42%	+0
Recommendations from friends	36%	+0
<b><u>Suitability of the destination in all seasons</u></b>	<b>22%</b>	<b>+2</b>

## SOURCE OF INFORMATION

<b>Web portals (TripAdvisor etc.)</b>	<b>42%</b>	<b>+3</b>
<b>Web forums</b>	<b>25%</b>	<b>+2</b>
Articles on the Internet	50%	-3
Travel literature	23%	-1
Blogs	22%	-1

## RESERVATION METHOD

Booking.com	66%	+2
<b>Agency</b>	<b>33%</b>	<b>+2</b>
Expedia.com	29%	-2
At the activity provider	6%	-1
Through official TICs	6%	-2

## TRAVELLING WITH

As a couple	46%	+2
Family	29%	-1
Friends	20%	+0
Relatives	1%	+0
Alone	4%	-1

## CHARACTERISTICS:

Size*	<b>4,923,623</b>
Share*	<b>13%</b>
Age	<b>41</b>
Women	<b>52%</b>

Spring	<b>27%</b>
Summer	<b>62%</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.

n=308

# ITALY: Green explorers (17.1%)



## DESTINATION TYPE

In the mountains	63%	+24
By the sea	84%	+20
Capitals	80%	+21
Elsewhere in nature	59%	+25
Cultural and historical centres	59%	+21

## TYPE OF ACCOMMODATION

Apartment	78%	+29
Staying with relatives or friends	27%	+8
Tourist farm	38%	+6
Hotel	78%	+0
Private accommodation (e.g. Airbnb)	32%	+4

## TRANSPORT TO THE DESTINATION

Aeroplane	78%	+4
Train	2%	+0
Car	16%	-2
Coach	1%	+0
Motorhome (camper)	2%	-1

## TRANSPORT AT THE DESTINATION

Car	73%	+6
Train	36%	+7
Coach	40%	+5
Bicycle	9%	+4
On foot	21%	+3

## ACTIVITIES

Natural sights, nature	79%	+18
Sightseeing of a town, the capital	79%	+15
Sightseeing of old town centres	77%	+16
Sun and sea	63%	+10
Sports activities	40%	+17

## MOTIVATION

Recommendations from friends	46%	+11
Past experience	47%	+5
Articles on the Internet	40%	+7
Price of the destination	42%	+5
Suitability of the destination in all seasons	26%	+6

## SOURCE OF INFORMATION

Friends, family	48%	+11
Articles on the Internet	60%	+7
Blogs	32%	+9
Web portals (TripAdvisor etc.)	42%	+3
Web forums	29%	+6

## RESERVATION METHOD

Booking.com	73%	+8
Airbnb	29%	+8
Directly at the accommodation provider	22%	+6
Expedia.com	35%	+4
At the activity provider	10%	+3

## TRAVELLING WITH

As a couple	48%	+4
Friends	24%	+3
Family	26%	-4
Relatives	0%	-1
Alone	2%	-3

## CHARACTERISTICS:

Size*	4,221,262
Share*	11%
Age	38
Women	43%

Spring	28%
Summer	61%
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.

## ITALY: Sociable foodies (12.2%)



## DESTINATION TYPE

Capitals	86%	<b>+27</b>
Cultural and historical centres	<b>77%</b>	<b>+39</b>
Cities	66%	<b>+21</b>
By the sea	79%	<b>+15</b>
Spas (wellness and spa)	<b>28%</b>	<b>+12</b>

## TYPE OF ACCOMMODATION

Hotel	90%	<b>+11</b>
Boutique hotel	<b>71%</b>	<b>+28</b>
Apartment	51%	<b>+3</b>
Tourist farm	42%	<b>+10</b>
Private accommodation (e.g. Airbnb)	40%	<b>+11</b>

## TRANSPORT TO THE DESTINATION

Aeroplane	78%	<b>+4</b>
Train	2%	<b>+1</b>
Coach	2%	<b>+0</b>
Car	16%	<b>-2</b>
Ship or another vessel	1%	<b>+0</b>

## TRANSPORT AT THE DESTINATION

Coach	45%	<b>+10</b>
Car	73%	<b>+6</b>
Train	36%	<b>+8</b>
On foot	<b>23%</b>	<b>+5</b>
Motorcycle	4%	<b>-2</b>

## ACTIVITIES

Natural sights, nature	92%	<b>+31</b>
History and castles	86%	<b>+35</b>
Seeing major tourist attractions	81%	<b>+35</b>
Sightseeing of old town centres	91%	<b>+30</b>
Sightseeing of a town, the capital	91%	<b>+27</b>

## MOTIVATION

Past experience	51%	<b>+9</b>
Suitability of the destination in all seasons	32%	<b>+13</b>
Price of the destination	44%	<b>+8</b>
Popularity of the destination	31%	<b>+9</b>
Articles on the Internet	39%	<b>+6</b>

## SOURCE OF INFORMATION

Articles on the Internet	68%	<b>+15</b>
Web portals (TripAdvisor etc.)	61%	<b>+23</b>
Blogs	31%	<b>+8</b>
Friends, family	42%	<b>+4</b>
Web forums	30%	<b>+7</b>

## RESERVATION METHOD

Booking.com	79%	<b>+15</b>
Expedia.com	36%	<b>+5</b>
Other web portal	8%	<b>+4</b>
Agency	33%	<b>+3</b>
Airbnb	25%	<b>+4</b>

## TRAVELLING WITH

Family	41%	<b>+11</b>
As a couple	43%	<b>-1</b>
Relatives	1%	<b>+0</b>
Friends	13%	<b>-7</b>
Alone	2%	<b>-3</b>

## CHARACTERISTICS:

Size*	<b>3,004,703</b>
Share*	<b>8%</b>
Age	<b>44</b>
Women	<b>44%</b>

Spring	<b>33%</b>
Summer	<b>61%</b>
Shorter trips	<b>2</b>
Longer trips	<b>1</b>

## NOTES:

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## ITALY: Relaxed escapists (9.9%)



## DESTINATION TYPE

Countryside	19%	+2
In the mountains	27%	-13
Elsewhere in nature	24%	-9
By a lake	17%	-6
By the sea	40%	-24

TYPE OF  
ACCOMMODATION

Tourist farm	30%	-2
Hotel	73%	-6
Own property (holiday cottage)	11%	+1
Hostel	13%	-4
<u>Glamping</u>	<u>6%</u>	<u>+2</u>

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	<u>21%</u>	<u>+3</u>
<u>Motorhome (camper)</u>	<u>4%</u>	<u>+1</u>
<u>Coach</u>	<u>3%</u>	<u>+2</u>
Aeroplane	68%	-6
Motorcycle	2%	+0

TRANSPORT AT THE  
DESTINATION

Car	60%	-8
On foot	14%	-4
<u>Motorcycle</u>	<u>8%</u>	<u>+2</u>
<u>Motorhome (camper)</u>	<u>8%</u>	<u>+3</u>
Coach	24%	-11

## ACTIVITIES

<u>Thermal health spas</u>	<u>40%</u>	<u>+19</u>
Natural sights, nature	59%	-2
<u>Selfness, digital- detox, etc.</u>	<u>21%</u>	<u>+13</u>
<u>Winter sports</u>	<u>18%</u>	<u>+4</u>
Gastronomy	38%	-10

## MOTIVATION

Travel presentations	22%	-3
Travel literature	20%	-1
Proximity of the destination	15%	+0
Suitability of the destination in all seasons	17%	-2
Articles on the Internet	26%	-7

SOURCE OF  
INFORMATION

Travel literature	24%	+0
Travel presentations	23%	+1
Articles in print media	19%	-2
Articles on the Internet	38%	-15
Web portals (TripAdvisor etc.)	24%	-14

## RESERVATION METHOD

Agency	29%	-1
Organiser	10%	+1
Through official TICs	8%	+1
Own accommodation	7%	+1
Expedia.com	26%	-5

## TRAVELLING WITH

As a couple	45%	+1
<u>Alone</u>	<u>8%</u>	<u>+3</u>
Family	29%	-1
Friends	18%	-2
Relatives	1%	+0

## CHARACTERISTICS:

Size*	2,436,721
Share*	7%
Age	41
Women	49%

Spring	26%
Summer	54%
Shorter trips	3
Longer trips	2

## NOTES:

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## ITALY: Urban conscious (9.5%)



## DESTINATION TYPE

Capitals	78%	+19
Cities	56%	+11
Cultural and historical centres	48%	+9
Elsewhere in nature	30%	-4
Spas (wellness and spa)	10%	-6

## TYPE OF ACCOMMODATION

Private accommodation (e.g. Airbnb)	43%	+15
Hostel	38%	+21
Apartment	52%	+3
Staying with relatives or friends	26%	+7
Boutique hotel	43%	+0

## TRANSPORT TO THE DESTINATION

Aeroplane	79%	+5
Motorhome (camper)	2%	+0
Car	16%	-1
Ship or another vessel	1%	+0
Coach	1%	-1

## TRANSPORT AT THE DESTINATION

Coach	50%	+14
Train	45%	+17
On foot	29%	+11
Car	57%	-10
Bicycle	6%	+1

## ACTIVITIES

Museums, galleries and art	84%	+37
Learning about the local way of life	79%	+36
Sightseeing of old town centres	83%	+22
Sightseeing of a town, the capital	81%	+17
Gastronomy	73%	+26

## MOTIVATION

Price of the destination	45%	+9
Past experience	48%	+6
Travel literature	28%	+6
Articles on the Internet	35%	+3
TV programmes	22%	+4

## SOURCE OF INFORMATION

Web portals (TripAdvisor etc.)	50%	+11
Articles on the Internet	62%	+9
Blogs	31%	+8
Articles in print media	29%	+9
Friends, family	44%	+6

## RESERVATION METHOD

Expedia.com	39%	+8
Booking.com	69%	+5
Through official TICs	13%	+5
Directly at the accommodation provider	22%	+6
Airbnb	25%	+4

## TRAVELLING WITH

Friends	31%	+11
As a couple	39%	-5
Alone	6%	+1
Family	24%	-6

## CHARACTERISTICS:

Size*	2,346,534
Share*	6%
Age	40
Women	58%

Spring	20%
Summer	63%
Shorter trips	2
Longer trips	1

## NOTES:

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## ITALY: Forever young (7.5%)



## DESTINATION TYPE

Capitals	53%	-6
By the sea	58%	-6
Cultural and historical centres	26%	-12
Countryside	10%	-8
Health resorts	3%	-3

TYPE OF  
ACCOMMODATION

Hotel	<b>86%</b>	<b>+7</b>
Hostel	15%	-2
Tourist farm	26%	-5
Glamping	5%	+1
Apartment	33%	-15

TRANSPORT TO THE  
DESTINATION

Train	<b>5%</b>	<b>+4</b>
Aeroplane	72%	-2
Coach	<b>4%</b>	<b>+2</b>
Motorcycle	<b>3%</b>	<b>+1</b>
Car	15%	-3

TRANSPORT AT THE  
DESTINATION

Car	66%	-2
Motorcycle	7%	+0
Coach	28%	-8
On foot	12%	-6
Bicycle	4%	-1

## ACTIVITIES

Sightseeing of old town centres	<b>82%</b>	<b>+21</b>
History and castles	<b>71%</b>	<b>+20</b>
Sightseeing of a town, the capital	<b>73%</b>	<b>+9</b>
Touring	<b>45%</b>	<b>+25</b>
Seeing major tourist attractions	<b>51%</b>	<b>+5</b>

## MOTIVATION

Past experience	<b>47%</b>	<b>+5</b>
Travel presentations	31%	+6
Recommendations from friends	35%	-1
Travel literature	24%	+3
Posts on social media, blogs	17%	-1

SOURCE OF  
INFORMATION

Friends, family	36%	-2
Travel literature	25%	+1
Articles in print media	24%	+3
Articles on the Internet	49%	-4
Agencies	17%	+1

## RESERVATION METHOD

Agency	29%	-1
Agoda.com	7%	+0
Organiser	8%	-1
Booking.com	56%	-8
Airbnb	17%	-4

## TRAVELLING WITH

As a couple	41%	-2
Family	29%	-1
Alone	<b>12%</b>	<b>+7</b>
Relatives	1%	+0
Friends	17%	-3

## CHARACTERISTICS:

Size*	<b>1,859,976</b>
Share*	<b>5%</b>
Age	<b>43</b>
Women	<b>53%</b>

Spring	<b>22%</b>
Summer	<b>56%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

## NOTES:

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## ITALY: Active nostalgists (7.2%)



## DESTINATION TYPE

<u>In the mountains</u>	<b>67%</b>	<b>+28</b>
<u>Elsewhere in nature</u>	<b>61%</b>	<b>+27</b>
<u>By a lake</u>	<b>41%</b>	<b>+18</b>
<u>Countryside</u>	<b>24%</b>	<b>+7</b>
By the sea	37%	-27

TYPE OF  
ACCOMMODATION

<u>Boutique hotel</u>	<b>62%</b>	<b>+19</b>
Tourist farm	35%	+3
Hostel	17%	+0
Hotel	70%	-9
Apartment	44%	-5

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	<b>27%</b>	<b>+9</b>
<u>Motorhome (camper)</u>	<b>4%</b>	<b>+2</b>
Aeroplane	67%	-7
Train	1%	-1
Ship or another vessel	1%	+0

TRANSPORT AT THE  
DESTINATION

Car	71%	+3
<u>Motorhome (camper)</u>	<b>13%</b>	<b>+8</b>
Coach	23%	-12
<u>Motorcycle</u>	<b>10%</b>	<b>+3</b>
Train	15%	-14

## ACTIVITIES

<u>Sports activities</u>	<b>43%</b>	<b>+20</b>
Natural sights, nature	62%	+2
<u>Visit to a wine cellar</u>	<b>25%</b>	<b>+9</b>
Learning about the local way of life	42%	-1
<u>Countryside, farm activities</u>	<b>22%</b>	<b>+8</b>

## MOTIVATION

Videos on the Internet	20%	+1
TV programmes	19%	+1
Articles on the Internet	29%	-4
Recommendations from friends	31%	-5
Articles in print media	16%	+0

SOURCE OF  
INFORMATION

Opinions in social media	25%	+1
Articles in print media	23%	+3
Friends, family	29%	-9
Travel literature	23%	-2
Travel presentations	20%	-1

## RESERVATION METHOD

<u>Organiser</u>	<b>13%</b>	<b>+4</b>
Agency	29%	-1
Directly at the accommodation provider	16%	+0
Agoda.com	7%	+0
Booking.com	57%	-7

## TRAVELLING WITH

<u>As a couple</u>	<b>54%</b>	<b>+10</b>
Family	27%	-3
<u>Relatives</u>	<b>2%</b>	<b>+1</b>
Friends	13%	-8
Alone	4%	-1

## CHARACTERISTICS:

Size*	<b>1,783,782</b>
Share*	<b>5%</b>
Age	<b>40</b>
Women	<b>42%</b>

Spring	<b>41%</b>
Summer	<b>43%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

## NOTES:

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## ITALY: Beauty and indulgence lovers (7.2%)



## DESTINATION TYPE

By the sea	<b>95%</b>	<b>+31</b>
Spas ( <u>wellness and spa</u> )	<b>39%</b>	<b>+23</b>
In the mountains	36%	-4
Capitals	47%	-12
By a lake	17%	-6

TYPE OF  
ACCOMMODATION

Hotel	<b>85%</b>	<b>+6</b>
Private accommodation (e.g. Airbnb)	28%	-1
Own property (holiday cottage)	15%	+6
Tourist farm	27%	-4
Staying with relatives or friends	16%	-3

TRANSPORT TO THE  
DESTINATION

Train	2%	+1
Aeroplane	76%	+2
Motorcycle	2%	+0
Car	17%	-1
Ship or another vessel	1%	+0

TRANSPORT AT THE  
DESTINATION

Car	<b>84%</b>	<b>+16</b>
On foot	13%	-4
Bicycle	4%	-1
Coach	23%	-12
Train	20%	-9

## ACTIVITIES

Sun and sea	86%	<b>+33</b>
Wellness and spa	67%	<b>+35</b>
Shopping	56%	<b>+22</b>
Recreation	46%	<b>+22</b>
Gastronomy	46%	-1

## MOTIVATION

Price of the destination	<b>47%</b>	<b>+11</b>
<u>Recommendations from friends</u>	<b>43%</b>	<b>+7</b>
<u>Popularity of the destination</u>	<b>30%</b>	<b>+7</b>
Travel presentations	29%	+4
Travel literature	24%	+3

SOURCE OF  
INFORMATION

Friends, family	<b>43%</b>	<b>+6</b>
Travel presentations	24%	+2
<u>Agencies</u>	<b>22%</b>	<b>+7</b>
Web portals (TripAdvisor etc.)	38%	-1
Articles on the Internet	49%	-4

## RESERVATION METHOD

<u>Agency</u>	<b>42%</b>	<b>+12</b>
Directly at the accommodation provider	18%	+2
At the activity provider	8%	+1
Expedia.com	26%	-4
Airbnb	18%	-3

## TRAVELLING WITH

Family	54%	<b>+24</b>
Alone	3%	-2
As a couple	32%	-12
Friends	11%	-9

## CHARACTERISTICS:

Size*	<b>1,776,903</b>
Share*	<b>5%</b>
Age	<b>42</b>
Women	<b>51%</b>

Spring	<b>18%</b>
Summer	<b>75%</b>
Shorter trips	<b>2</b>
Longer trips	<b>1</b>

## ITALY: Carefree youth (2.9%)



## DESTINATION TYPE

By the sea	82%	+18
Cities	57%	+12
Capitals	43%	-16
Countryside	13%	-4
Cultural and historical centres	20%	-18

TYPE OF  
ACCOMMODATION

Hostel	50%	+32
Apartment	45%	-3
Private accommodation (e.g. Airbnb)	35%	+7
Staying with relatives or friends	26%	+7
Boutique hotel	39%	-3

TRANSPORT TO THE  
DESTINATION

Ship or another vessel	5%	+5
Aeroplane	75%	+1
Motorhome (camper)	5%	+3
Motorcycle	2%	+0
Car	11%	-7

TRANSPORT AT THE  
DESTINATION

Coach	40%	+5
Motorcycle	12%	+6
Bicycle	12%	+7
Train	31%	+3
On foot	21%	+3

## ACTIVITIES

Music festivals and concerts	41%	+22
Nightlife (bars, clubs)	43%	+22
Aquafun, amusement parks	34%	+20
Sun and sea	51%	-2
Social events, festivals	33%	+4

## MOTIVATION

Recommendations from friends	37%	+1
Articles on the Internet	35%	+2
Videos on the Internet	22%	+3
Web ads	12%	+2
Popularity of the destination	22%	-1

SOURCE OF  
INFORMATION

Articles on the Internet	55%	+2
Web forums	28%	+5
Opinions in social media	26%	+3
Friends, family	33%	-5
Blogs	23%	+0

## RESERVATION METHOD

Airbnb	28%	+7
Expedia.com	32%	+1
Organiser	14%	+5
Agoda.com	9%	+2
Booking.com	50%	-14

## TRAVELLING WITH

Friends	43%	+22
Alone	13%	+9
As a couple	35%	-9
Family	9%	-21

## CHARACTERISTICS:

Size*	707,200
Share*	2%
Age	33
Women	54%

Spring	16%
Summer	75%
Shorter trips	4
Longer trips	2

## ITALY: Devoted mothers (2.8%)



## DESTINATION TYPE

<u>In the mountains</u>	61%	+22
<u>By a lake</u>	37%	+13
Elsewhere in nature	36%	+2
By the sea	48%	-16
<u>Countryside</u>	24%	+7

TYPE OF  
ACCOMMODATION

<u>Apartment</u>	77%	+28
<u>Tourist farm</u>	59%	+27
Staying with relatives or friends	20%	+1
<u>Glamping</u>	14%	+10
Boutique hotel	37%	-5

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	29%	+11
<u>Motorhome (camper)</u>	9%	+6
Train	3%	+2
Aeroplane	52%	-22
<u>Ship or another vessel</u>	2%	+2

TRANSPORT AT THE  
DESTINATION

<u>Car</u>	76%	+8
<u>Motorcycle</u>	13%	+7
Coach	23%	-12
<u>Bicycle</u>	11%	+6
Train	15%	-13

## ACTIVITIES

<u>Activities and fun for children</u>	48%	+34
<u>Countryside, farm activities</u>	44%	+30
<u>Winter sports</u>	32%	+18
<u>Thermal health spas</u>	30%	+9
Wellness and spa	35%	+3

## MOTIVATION

<u>Articles on the Internet</u>	46%	+14
Recommendations from friends	41%	+5
Videos on the Internet	25%	+6
Travel literature	22%	+1
Articles in print media	20%	+4

SOURCE OF  
INFORMATION

<u>Friends, family</u>	45%	+7
Travel literature	32%	+8
Articles on the Internet	49%	-4
Articles in print media	25%	+4
Web forums	23%	+1

## RESERVATION METHOD

<u>Agoda.com</u>	18%	+11
Expedia.com	35%	+4
Booking.com	64%	+0
<u>Organiser</u>	13%	+4
Own accommodation	11%	+5

## TRAVELLING WITH

<u>Family</u>	37%	+7
As a couple	42%	-2
<u>Relatives</u>	2%	+1
Friends	15%	-5
Alone	3%	-1

## CHARACTERISTICS:

Size*	692,745
Share*	2%
Age	33
Women	42%

Spring	27%
Summer	57%
Shorter trips	4
Longer trips	2

## NOTES:

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## ITALY: Adventurists (1.9%)



## DESTINATION TYPE

<u>Elsewhere in nature</u>	<b>70%</b>	<b>+36</b>
<u>By a lake</u>	<b>61%</b>	<b>+37</b>
<u>In the mountains</u>	<b>50%</b>	<b>+11</b>
<u>Countryside</u>	<b>27%</b>	<b>+10</b>
By the sea	31%	-33

TYPE OF  
ACCOMMODATION

<u>Hostel</u>	<b>38%</b>	<b>+21</b>
<u>Tourist farm</u>	<b>50%</b>	<b>+19</b>
<u>Camp</u>	<b>27%</b>	<b>+16</b>
<u>Glamping</u>	<b>21%</b>	<b>+17</b>
<u>Camper</u>	<b>15%</b>	<b>+9</b>

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	<b>34%</b>	<b>+16</b>
<u>Motorhome</u>	<b>26%</b>	<b>+24</b>
<u>Motorcycle</u>	<b>6%</b>	<b>+5</b>
Aeroplane	34%	-40

TRANSPORT AT THE  
DESTINATION

<u>Motorcycle</u>	<b>29%</b>	<b>+23</b>
Car	63%	-4
<u>Motorhome</u>	<b>22%</b>	<b>+18</b>
<u>(camper)</u>	<b>12%</b>	<b>+7</b>
<u>Bicycle</u>	<b>14%</b>	<b>-21</b>
Coach		

## ACTIVITIES

Water sports activities	<b>43%</b>	<b>+31</b>
Mountaineering (more challenging tours)	<b>36%</b>	<b>+30</b>
<u>Adrenaline sports challenges</u>	<b>32%</b>	<b>+23</b>
<u>History and castles</u>	<b>60%</b>	<b>+9</b>
<u>Winter sports</u>	<b>24%</b>	<b>+11</b>

## MOTIVATION

<u>Travel literature</u>	<b>44%</b>	<b>+22</b>
<u>Articles in print media</u>	<b>33%</b>	<b>+17</b>
Articles on the Internet	36%	+3
Posts on social media, blogs	23%	+5
TV ads	21%	+12

SOURCE OF  
INFORMATION

<u>Articles in print media</u>	<b>40%</b>	<b>+19</b>
Travel literature	37%	+12
Web forums	24%	+1
Blogs	21%	-2
Articles on the Internet	39%	-14

## RESERVATION METHOD

<u>Agency</u>	<b>45%</b>	<b>+14</b>
<u>Agoda.com</u>	<b>29%</b>	<b>+22</b>
Expedia.com	36%	+5
Airbnb	22%	+1
Organiser	11%	+2

## TRAVELLING WITH

<u>As a couple</u>	<b>56%</b>	<b>+12</b>
<u>Friends</u>	<b>33%</b>	<b>+12</b>
Family	9%	-21
Alone	2%	-2

## CHARACTERISTICS:

Size*	<b>478,616</b>
Share*	<b>1%</b>
Age	<b>36</b>
Women	<b>23%</b>

Spring	<b>31%</b>
Summer	<b>58%</b>
Shorter trips	<b>5</b>
Longer trips	<b>3</b>

## ITALY: Active families (1.8%)



## DESTINATION TYPE

By a lake	55%	+32
<u>Elsewhere in nature</u>	54%	+20
In the mountains	48%	+8
<u>Countryside</u>	30%	+12
By the sea	43%	-21

TYPE OF  
ACCOMMODATION

<u>Apartment</u>	88%	+39
Camp	26%	+15
<u>Glamping</u>	12%	+9
Boutique hotel	34%	-8
Tourist farm	26%	-6

TRANSPORT TO THE  
DESTINATION

Car	41%	+23
<u>Motorhome</u> (camper)	8%	+5
<u>Bicycle</u>	3%	+3
<u>Coach</u>	6%	+4
Aeroplane	40%	-34

TRANSPORT AT THE  
DESTINATION

<u>Motorcycle</u>	22%	+16
<u>Motorhome</u> (camper)	22%	+17
Car	67%	+0
<u>Bicycle</u>	10%	+5
Train	14%	-15

## ACTIVITIES

Water sports activities	55%	+43
<u>Mountaineering (more</u> <u>challenging tours)</u>	33%	+27
<u>Sports activities</u>	34%	+12
<u>Health treatments and</u> <u>services</u>	23%	+13
<u>Adrenaline sports</u> <u>challenges</u>	17%	+9

## MOTIVATION

<u>Articles in print</u> <u>media</u>	26%	+10
Videos on the Internet	29%	+10
Web ads	20%	+10
Past experience	40%	-2
Travel presentations	24%	-1

SOURCE OF  
INFORMATION

Travel presentations	32%	+10
Travel literature	27%	+3
Friends, family	28%	-10
Web forums	16%	-6
Articles on the Internet	38%	-15

## RESERVATION METHOD

<u>Organiser</u>	24%	+15
Agency	33%	+3
<u>Agoda.com</u>	16%	+10
Expedia.com	29%	-2
Other web portal	7%	+4

## TRAVELLING WITH

<u>Alone</u>	15%	+10
As a couple	37%	-7
<u>Friends</u>	31%	+11
<u>Relatives</u>	4%	+3
Family	13%	-17

## CHARACTERISTICS:

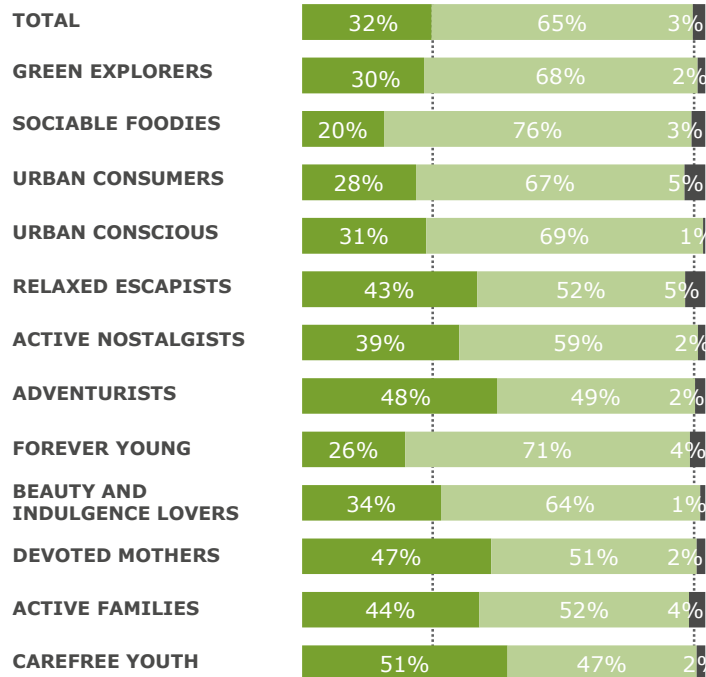
Size*	440,187
Share*	1%
Age	37
Women	30%

Spring	13%
Summer	60%
Shorter trips	5
Longer trips	3

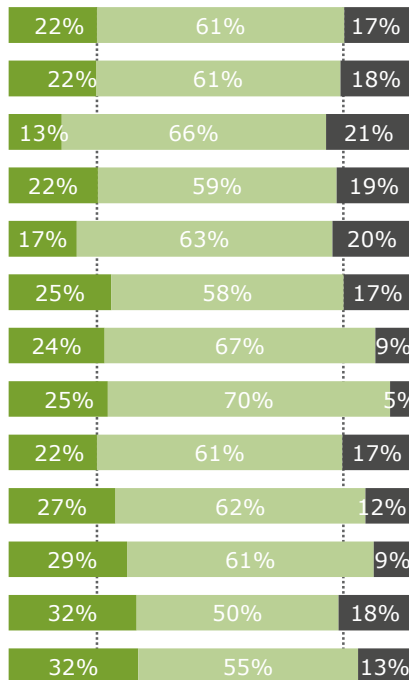
# ITALY: Price sensitivity



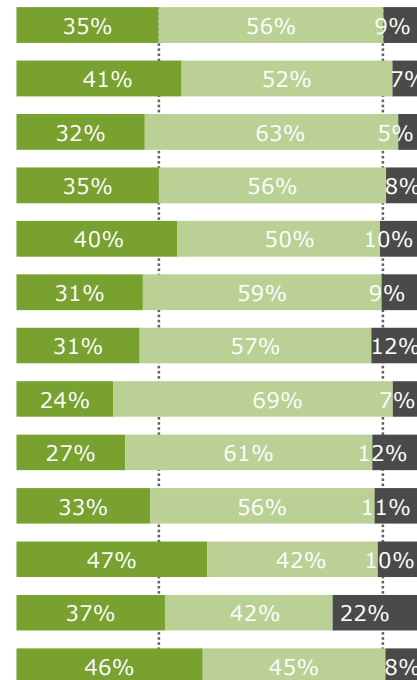
## CHOICE OF ACCOMMODATION



## CHOICE OF DESTINATION



## CHOICE OF TRANSPORT

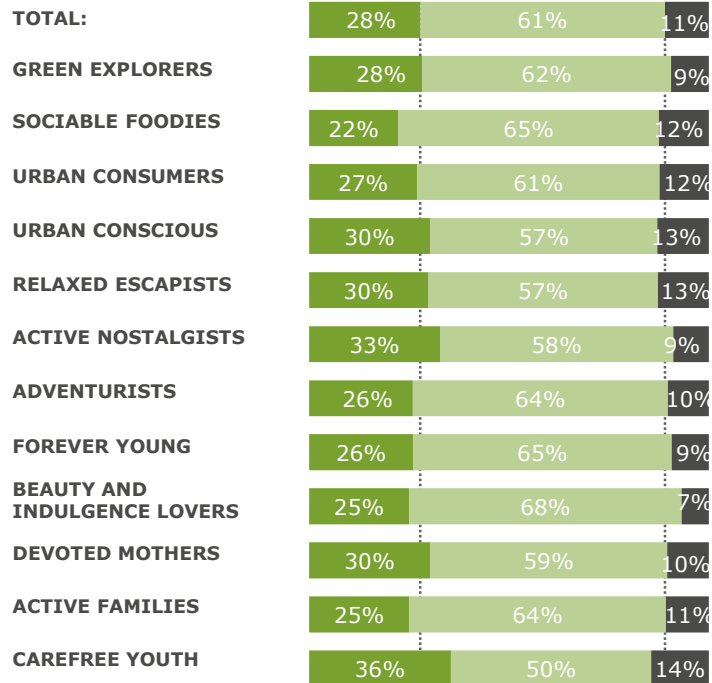


seek the most favourable offer
  assess value for money
  disregard the price

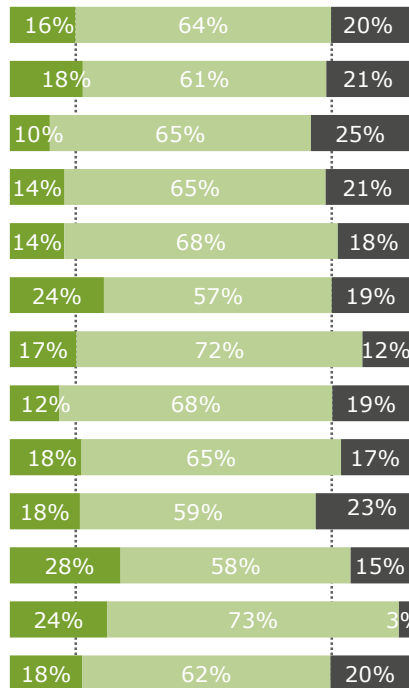
# ITALY: Price sensitivity



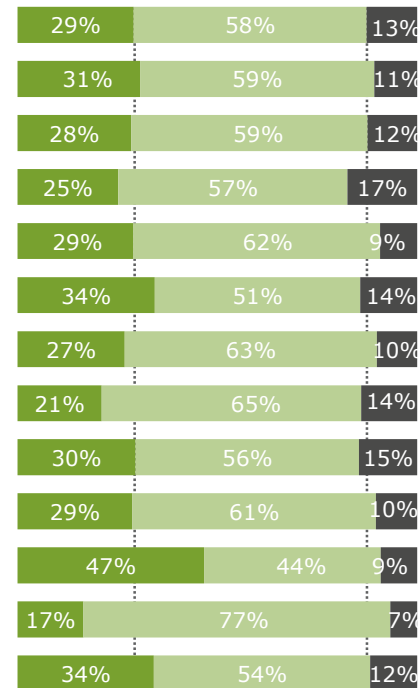
## CHOICE OF ADDITIONAL ACTIVITIES



## CHOICE OF FOOD



## SHOPPING



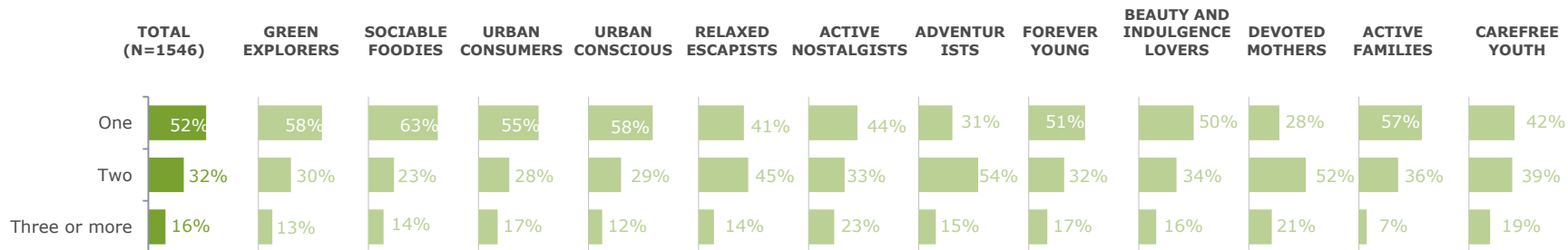
seek the most favourable offer
  assess value for money
  disregard the price



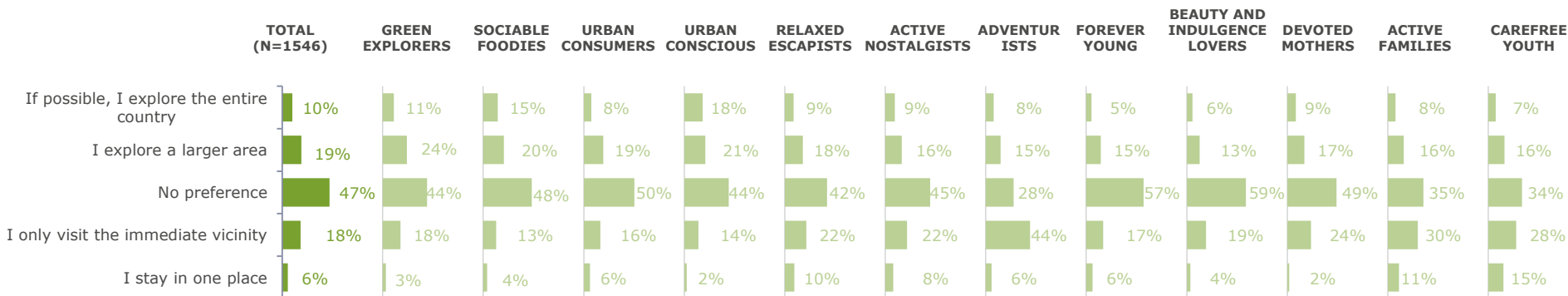
# ITALY: Level of exploration



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



## Exploring in one country



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



# ITALY: General travel habits and motives



## CHARACTERISTICS OF THE TARGET GROUP:

Size	<b>24,672,253</b>	Spring	<b>27%</b>
Proportion	<b>66.2%</b>	Summer	<b>60%</b>
Age	<b>40</b>	Shorter trips	<b>3</b>
Women	<b>48%</b>	Longer trips	<b>2</b>

## TRAVELLING WITH:

As a couple	<b>44%</b>
Family	<b>30%</b>
Friends	<b>20%</b>
Alone	<b>5%</b>
Relatives	<b>1%</b>

## DESTINATION TYPE:

By the sea	<b>35%</b>	<b>29%</b>	<b>64%</b>
Capital	<b>16%</b>	<b>43%</b>	<b>59%</b>
Towns	<b>16%</b>	<b>29%</b>	<b>46%</b>

**5x**  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of a town, capital	<b>64%</b>
Sightseeing of old town centres	<b>61%</b>
Nature parks, attractions	<b>60%</b>
Sun and sea	<b>53%</b>
History and castles	<b>51%</b>
Museums, galleries, art	<b>47%</b>
Gastronomic pleasures	<b>47%</b>
Tourist attractions	<b>46%</b>
Live like a local	<b>43%</b>
Shopping	<b>35%</b>

## TRAVEL MOTIVES – TOP 10:

To learn something new	<b>16%</b>	<b>41%</b>
Visit a town, the capital	<b>15%</b>	<b>40%</b>
Experience another culture	<b>9%</b>	<b>34%</b>
Visit a beautiful destination	<b>9%</b>	<b>31%</b>
Retreat from everyday life	<b>8%</b>	<b>28%</b>
Rest, slow down the pace of life	<b>6%</b>	<b>24%</b>
Relaxation	<b>7%</b>	<b>21%</b>
Spend time with partner	<b>4%</b>	<b>20%</b>
Enjoy good food, drinks	<b>2%</b>	<b>18%</b>
Experience diversity	<b>4%</b>	<b>17%</b>

## VISITING COUNTRIES – TOP 10:

France	<b>33%</b>	<b>58%</b>
Spain	<b>35%</b>	<b>52%</b>
Germany	<b>19%</b>	<b>40%</b>
United Kingdom	<b>25%</b>	<b>40%</b>
Greece	<b>18%</b>	<b>36%</b>
Austria	<b>12%</b>	<b>29%</b>
Switzerland	<b>9%</b>	<b>26%</b>
Croatia	<b>8%</b>	<b>22%</b>
Netherlands	<b>9%</b>	<b>21%</b>
Non-European countries	<b>8%</b>	<b>19%</b>
Slovenia	<b>2%</b>	<b>8%</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).

# ITALY: Elements of the purchase journey and consumption



## TYPE OF ACCOMMODATION:



Other frequent accommodation types:

**Tourist farm 32%**

**Private accommodation: 28%**

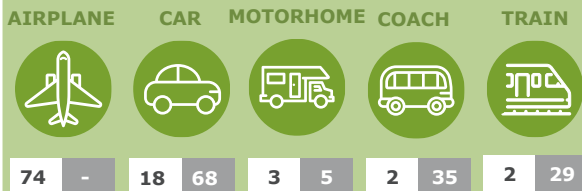
**Relatives, friends: 19%**

## RESERVATION

**UP  
TO 3  
months in  
advance**

**89%**

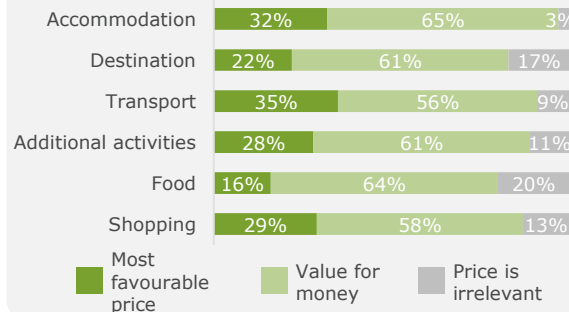
## TRANSPORT MODE (%):



□ To the destination

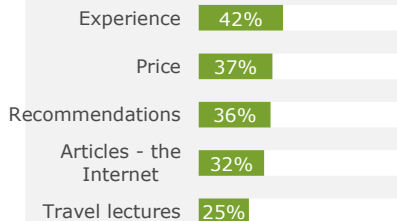
■ At the destination (18% ON FOOT, 6% MOTORCYCLE, 5% BICYCLE)

## PRICE SENSITIVITY:

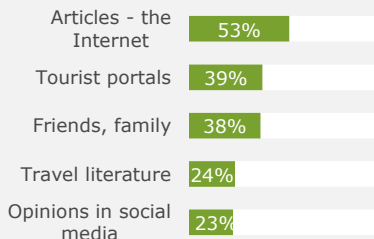


## PURCHASE JOURNEY:

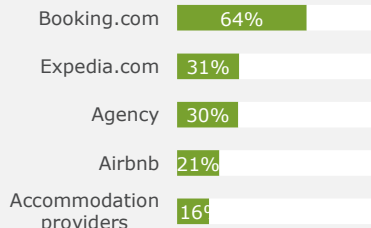
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€98	€100
TRANSPORT per person	€141	€148

## 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.



## CHARACTERISTICS OF VISITORS TO SLOVENIA:

Size	7,742,854	Spring	29%
Proportion	20.8%	Summer	57%
Age	41	Shorter trips	4
Women	41%	Longer trips	2

## TRAVELLING WITH:

As a couple	44%
Family	32%
Friends	17%
Alone	6%
Relatives	1%

## DESTINATION TYPE:

By the sea	35%	28%	63%
Capital	15%	41%	56%
In the mountains	11%	30%	41%

6x

a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of a town, capital	61%
Sightseeing of old town centres	60%
Nature parks, attractions	57%
History and castles	49%
Sun and sea	49%
Tourist attractions	45%
Gastronomic pleasures	44%
Museums, galleries, art	43%
Live like a local	42%
Wellness and (beauty) spa	33%

## TRAVEL MOTIVES – TOP 10:

To learn something new	16%	40%
Visit a town, the capital	14%	37%
Experience another culture	8%	31%
Visit a beautiful destination	8%	30%
Retreat from everyday life	7%	24%
Spend time with partner	3%	21%
Rest, slow down the pace of life	5%	20%
Relaxation	6%	19%
Enjoy good food, drinks	3%	19%
Clear your head, gather thoughts	6%	17%

## VISITING COUNTRIES – TOP 10:

France	33%	60%
Spain	34%	53%
Germany	20%	46%
Austria	16%	40%
Greece	22%	39%
United Kingdom	18%	37%
Switzerland	11%	35%
Croatia	14%	35%
Netherlands	11%	27%
Portugal	12%	26%
Slovenia	8%	25%

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).

# ITALY: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia



## TYPE OF ACCOMMODATION:



75%



48%



43%

Other frequent accommodation types:

**Tourist farm 33%**

**Private accommodation: 25%**

**Hostel: 17%**

## RESERVATION

**UP  
TO 3  
months in  
advance**

**93%**

## TRANSPORT MODE (%):

AIRPLANE



67

CAR



23

72

MOTORHOME



4

9

COACH



2

26

MOTORCYCLE



1

10

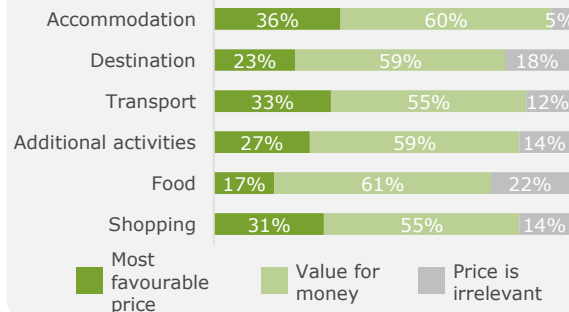


To the destination



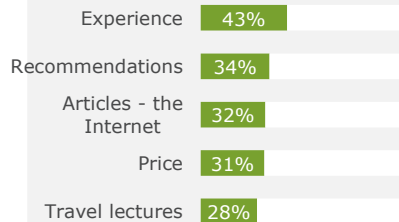
At the destination (21% TRAIN, 13% ON FOOT, 6% BICYCLE)

## PRICE SENSITIVITY:

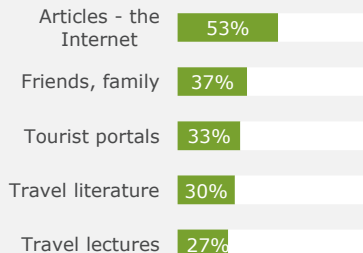


## PURCHASE JOURNEY:

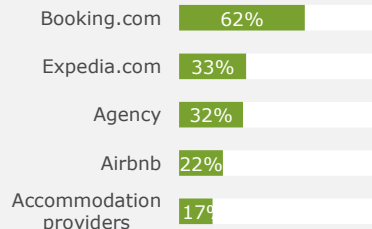
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€90	€89
TRANSPORT per person	€133	€140

### 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.



## CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size	1,971,693	Spring	28%
Proportion	5.3%	Summer	55%
Age	43	Shorter trips	3
Women	38%	Longer trips	2

## TRAVELLING WITH:

As a couple	41%
Family	36%
Friends	19%
Alone	4%

## DESTINATION TYPE:

By the sea	39%	36%	75%
Capital	16%	54%	71%
Cult. and hist. centres	12%	36%	48%

**5x**  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of old town centres	76%
Sightseeing of a town, the capital	71%
Nature parks, attractions	69%
Tourist attractions	67%
History and castles	65%
Sun and sea	63%
Gastronomic pleasures	59%
Museums, galleries, art	56%
Live like a local	55%
Social events, festivals, and other events	38%

## TRAVEL MOTIVES – TOP 10:

To learn something new	21%	50%
Visit a town, the capital	10%	43%
Experience another culture	15%	41%
Visit to a beautiful destination	8%	34%
Retreat from everyday life	6%	25%
Spend time with partner	5%	23%
Rest, slow down the pace of life	3%	19%
Enjoy good food, drinks	4%	19%
Experience diversity	2%	18%
Take care of oneself, be restored	5%	16%

## VISITING COUNTRIES – TOP 10:

Slovenia	31%	100%
France	36%	75%
Spain	42%	66%
Germany	24%	65%
Croatia	24%	64%
Austria	23%	58%
Greece	31%	53%
United Kingdom	23%	52%
Switzerland	13%	49%
Netherlands	12%	44%

■ 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).

# ITALY: Elements of the purchase journey and consumption

*Subsample: tourists in Slovenia*



## TYPE OF ACCOMMODATION:



Other frequent accommodation types:

**Tourist farm 35%**

**Private accommodation: 33%**

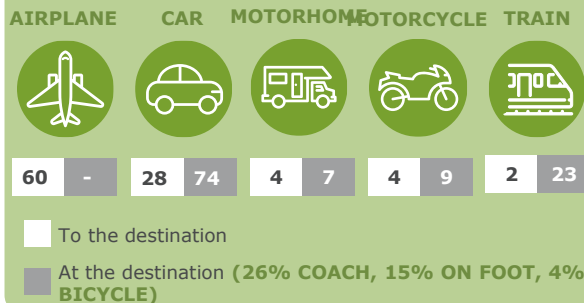
**Relatives, friends: 16%**

## RESERVATION

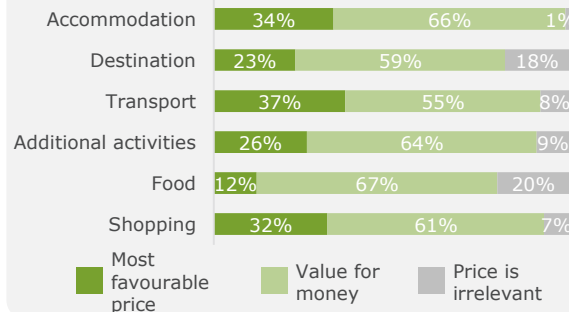
**UP  
TO 3  
months in  
advance**

**91%**

## TRANSPORT MODE (%):

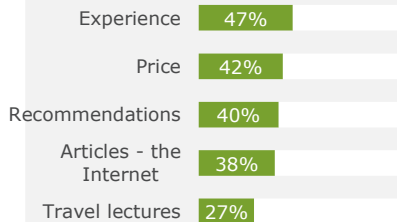


## PRICE SENSITIVITY:

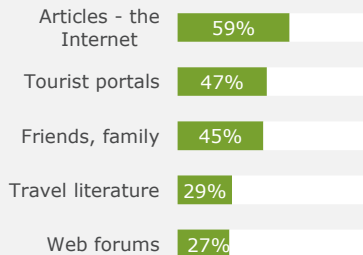


## PURCHASE JOURNEY:

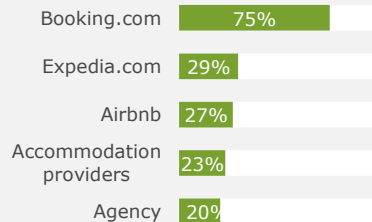
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	€82	€81
	in SLO	€69	€71
TRANSPORT per person	in Europe	€136	€147
	in SLO	€99	€96

## 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**



# ITALY: Destination relevance

Share of visitors by popularity of the destination



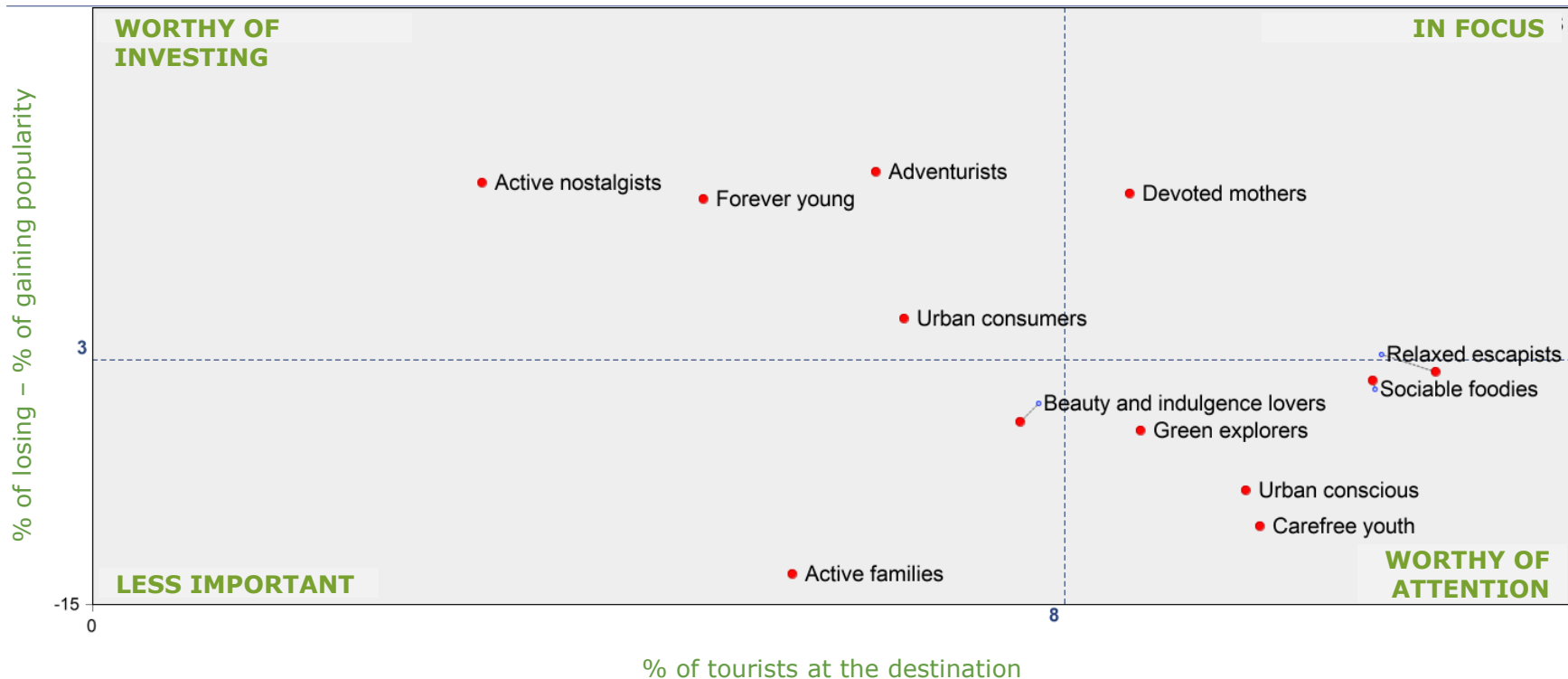
**NOTES:**

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).

# ITALY: Slovenia's relevance

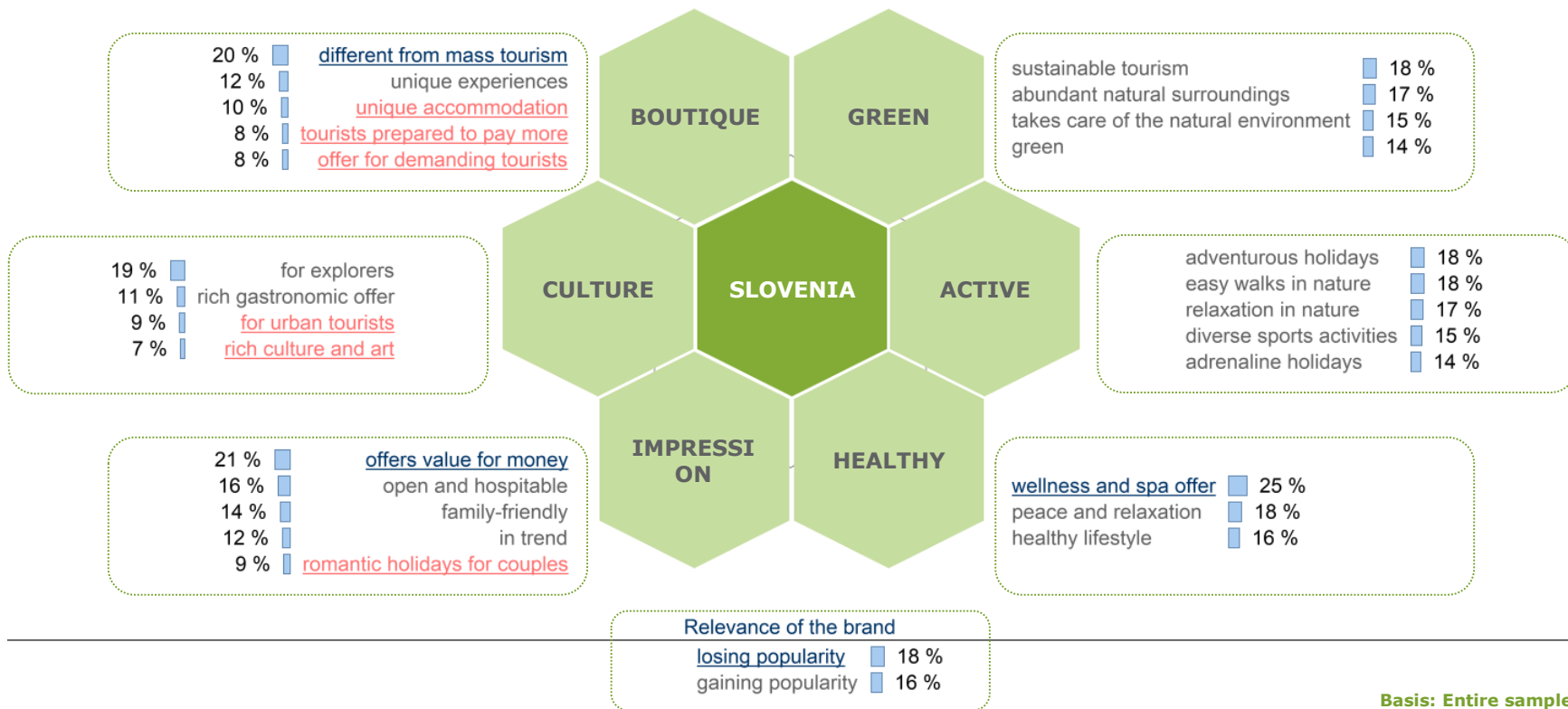
Slovenia's relevance as a tourist destination according to the popularity by segments of tourists



**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).

# ITALY: Slovenia's image



**Basis: Entire sample**

**NOTES:**

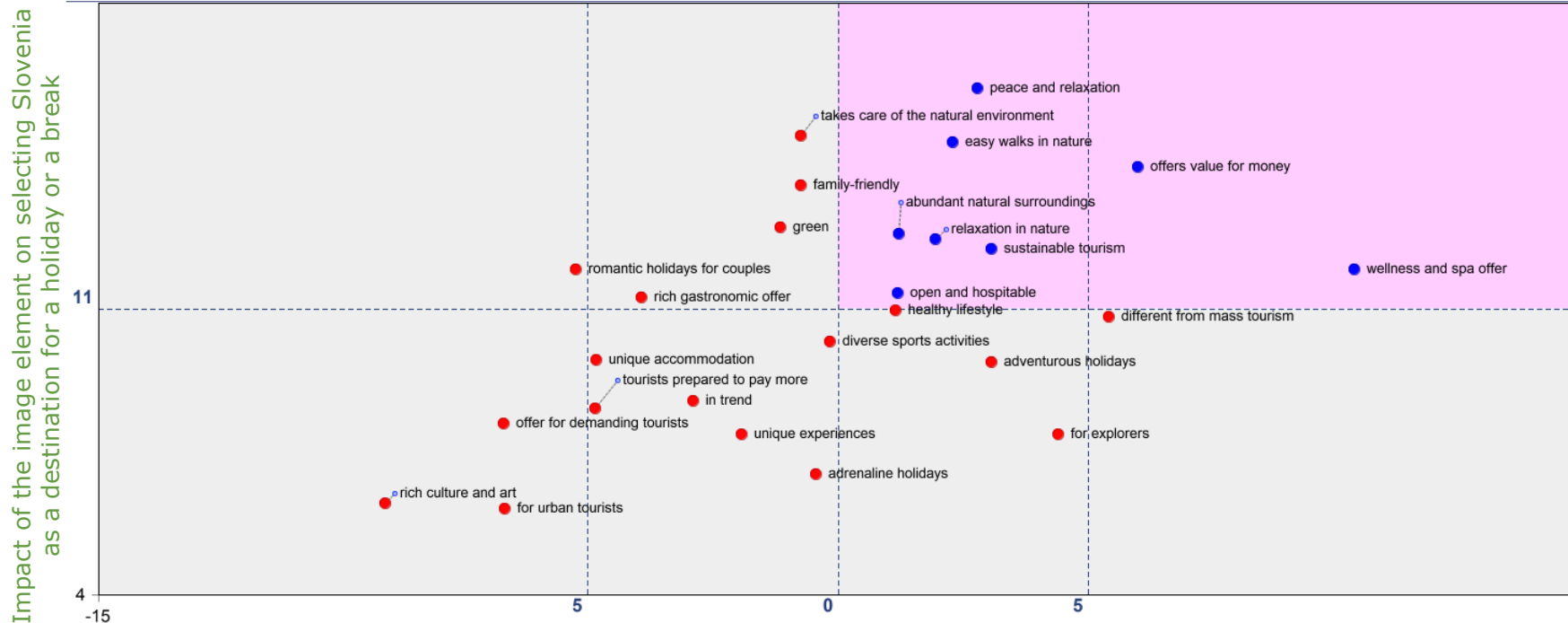
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

# ITALY: 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)



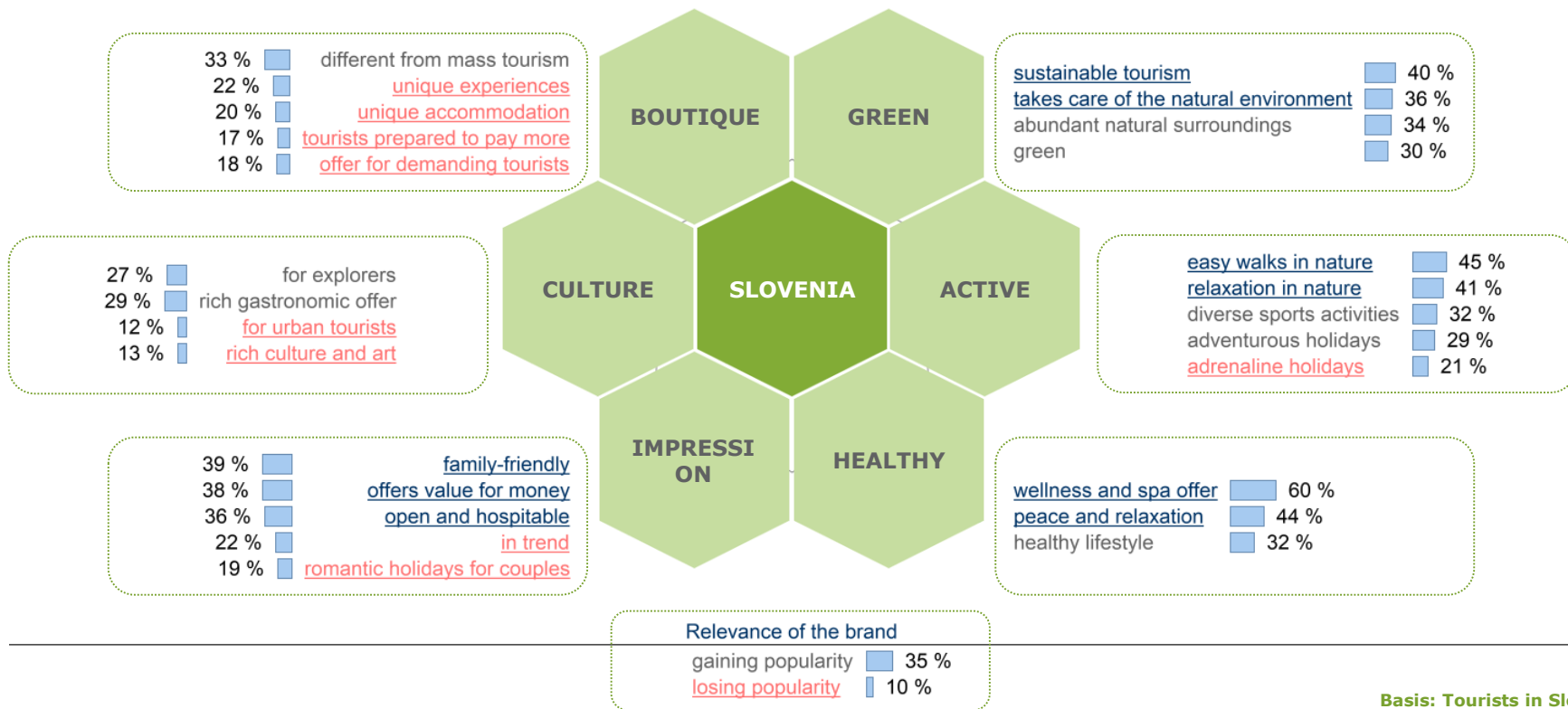
Weaker association of Slovenia ← → Stronger association of Slovenia

**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.

# ITALY: 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.

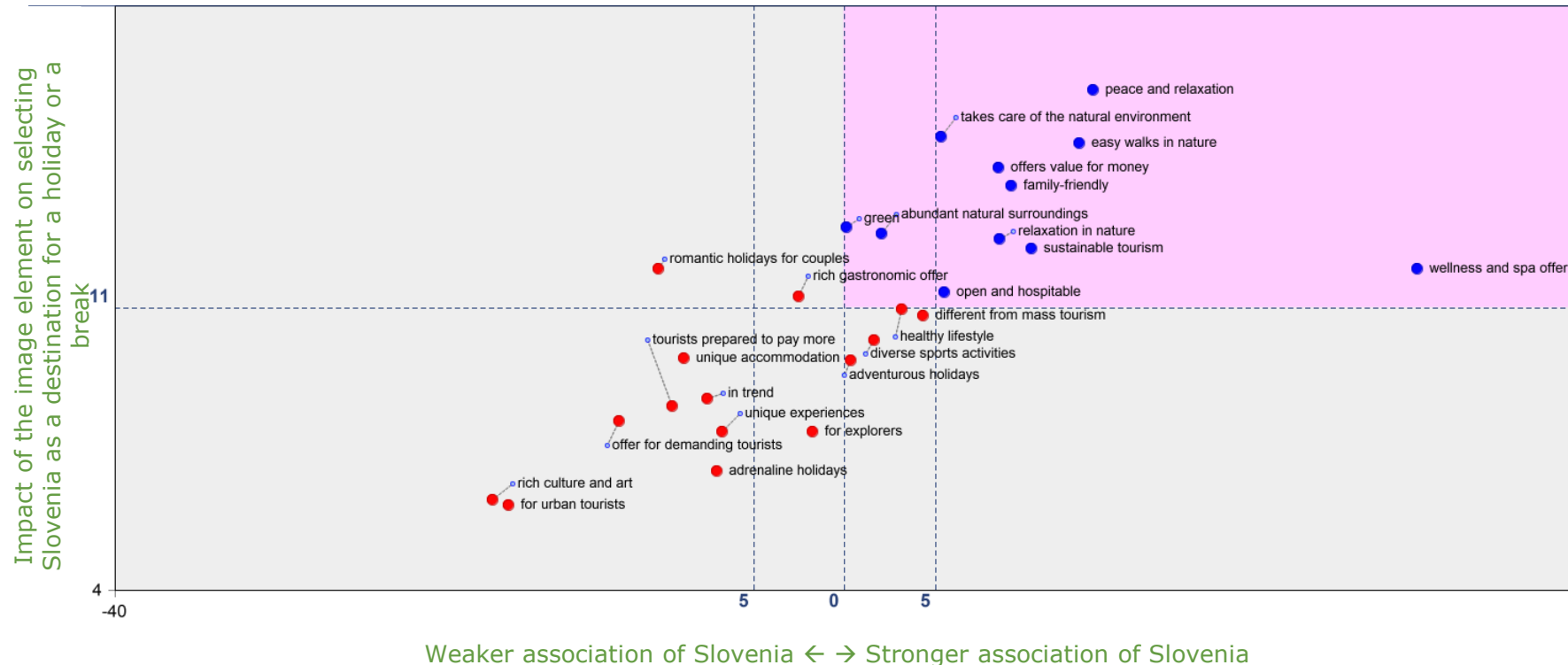
# ITALY: Significance of elements

*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.

# ITALY: Destination image

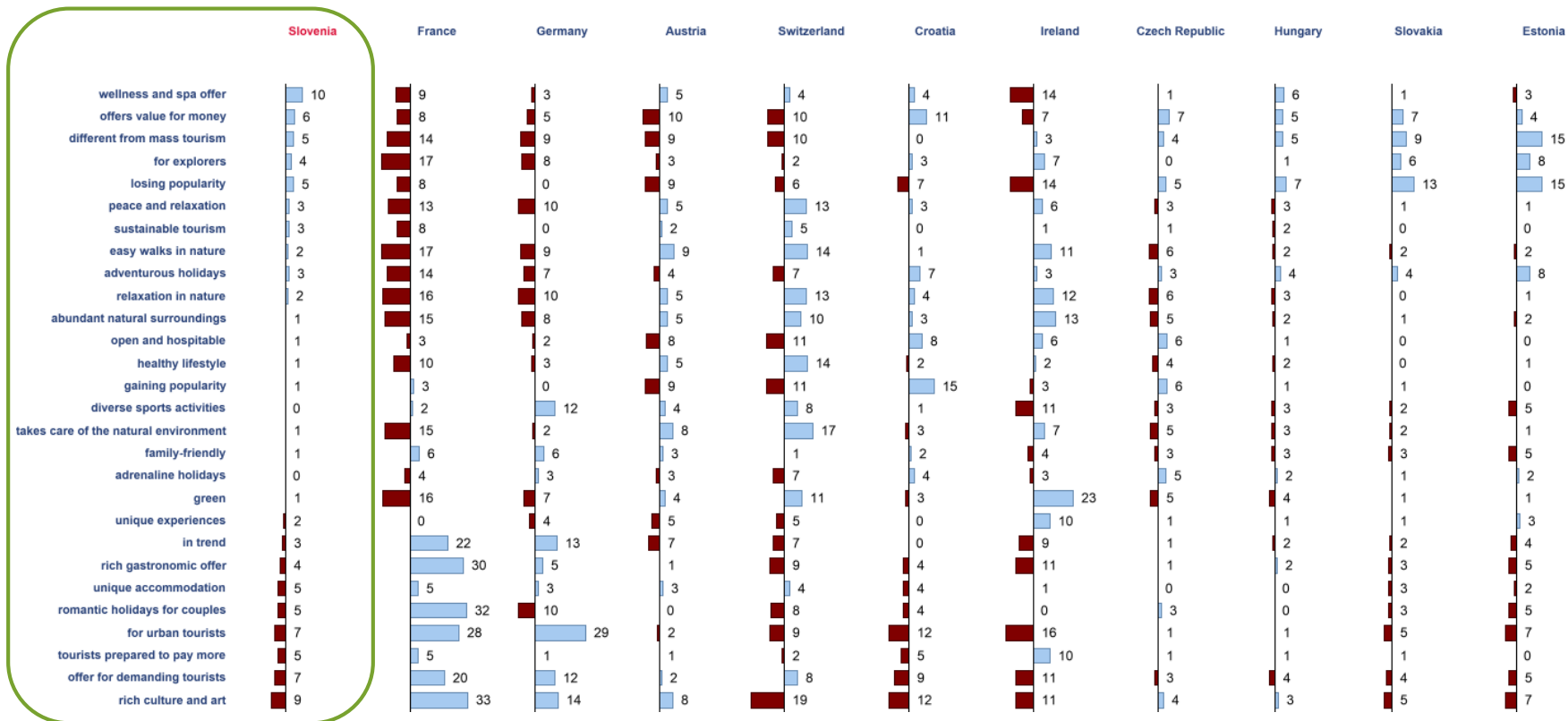


**NOTES:**

For each element provided or statement linked to the image of countries as tourist destinations, the respondents chose three of the countries available, for which they believed that the statements were most suitable. They first selected the country for which the statement was most applicable. The shares of statements for destinations by elements are shown. The elements are classified according to the share of statements for Slovenia.



# ITALY: 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**

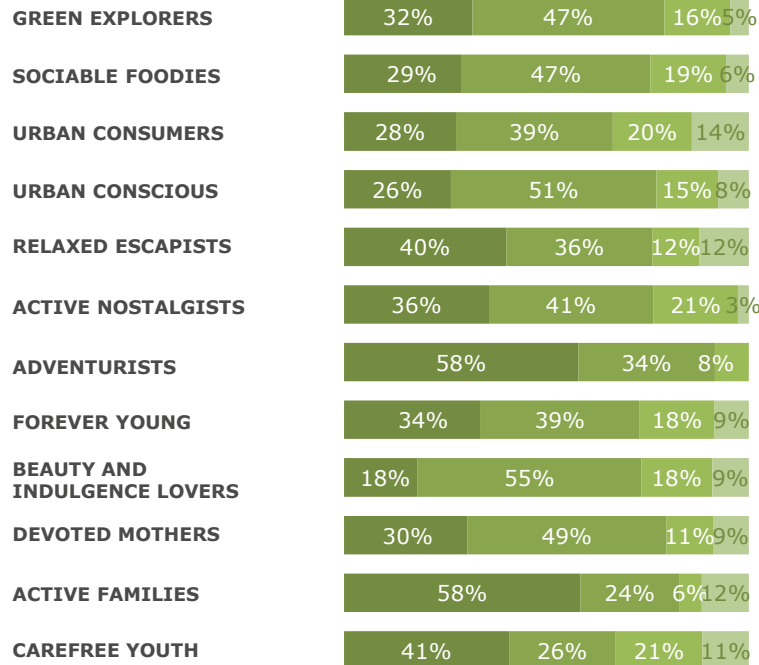


# ITALY: Knowledge of, and experience with, Slovenia



## KNOWLEDGE OF SLOVENIA

Basis: sample

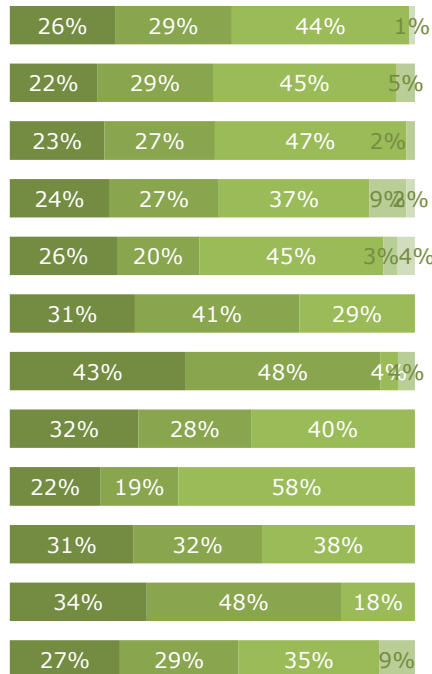


Knowledge:



## SATISFACTION

Basis: visitors to Slovenia

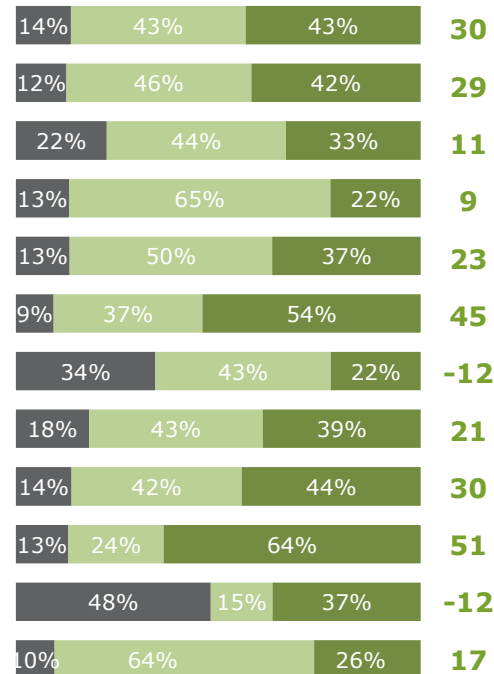


Meeting of expectations:



## NPS – DEGREE OF RECOMMENDATION

NPS Index



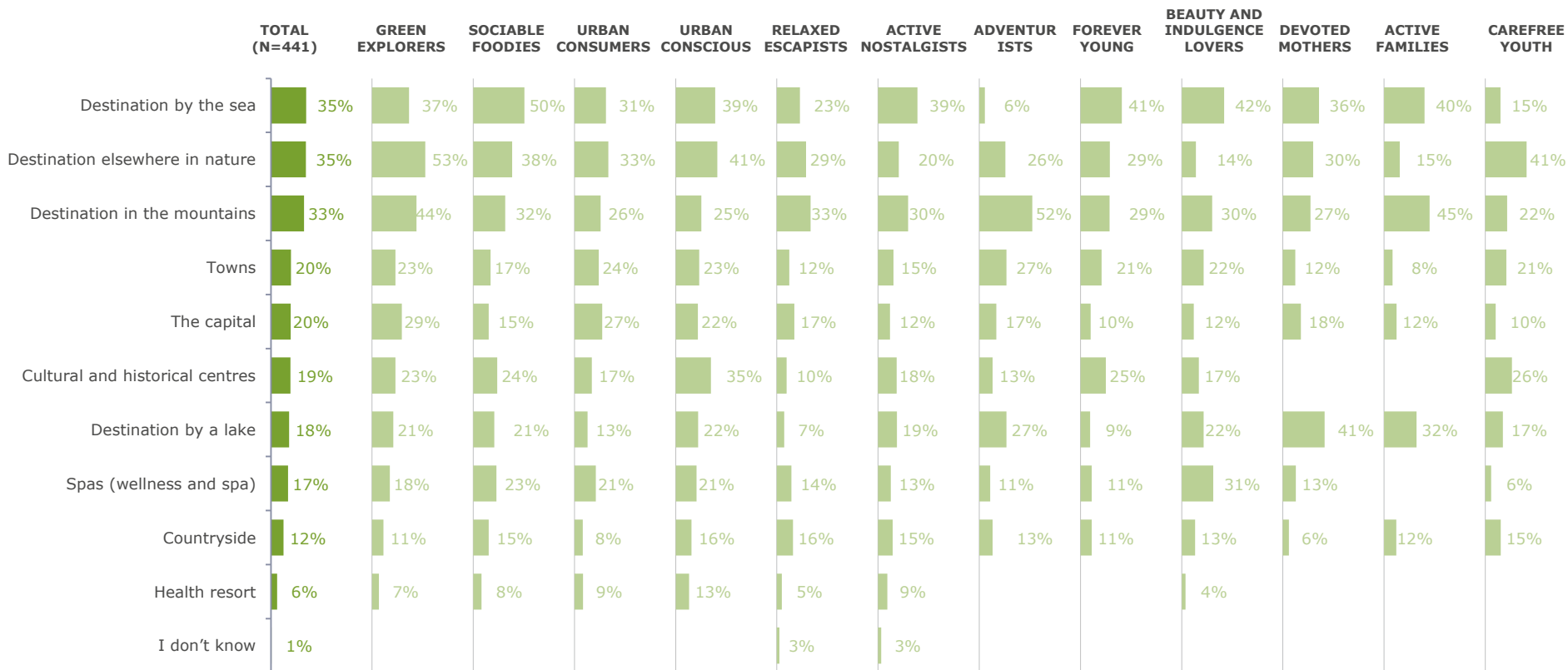
Recommendations:



**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.

# ITALY: Destination type in Slovenia

*Subsample: visitors to Slovenia*



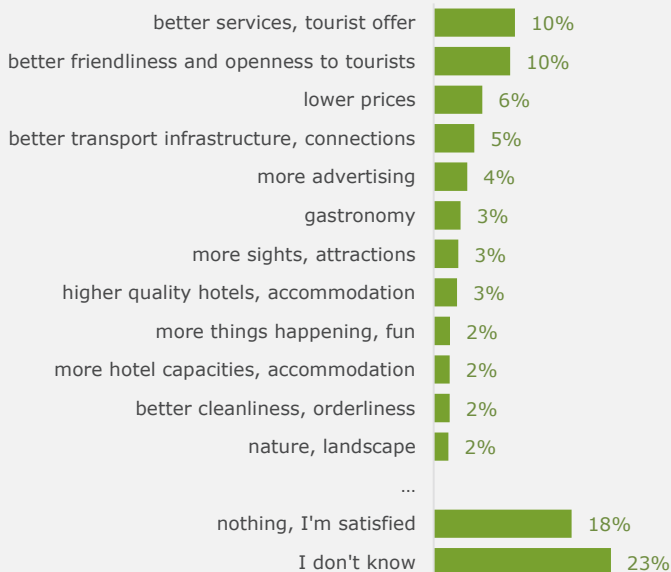
**NOTES:**

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=298*

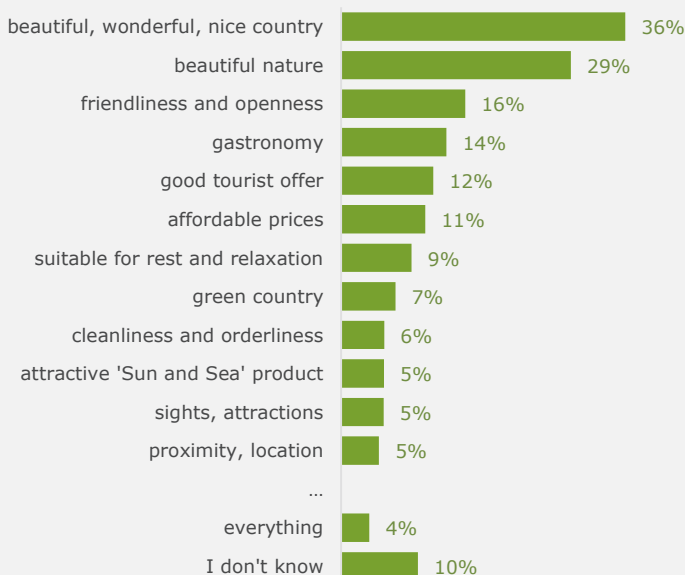


### NOTES:

OTHER STATEMENTS: modernisation, I'm not familiar enough, offer of local goods and own culture, lower prices/abolishment of vignettes, ensure a more pleasant stay, attractiveness, knowledge of foreign languages, more information and information points, more sports activities, prefer other destinations, unattractiveness of the 'sun and sea' product

## Elements of excitement – Top 12

*Promoters (would recommend Slovenia ), n=186*

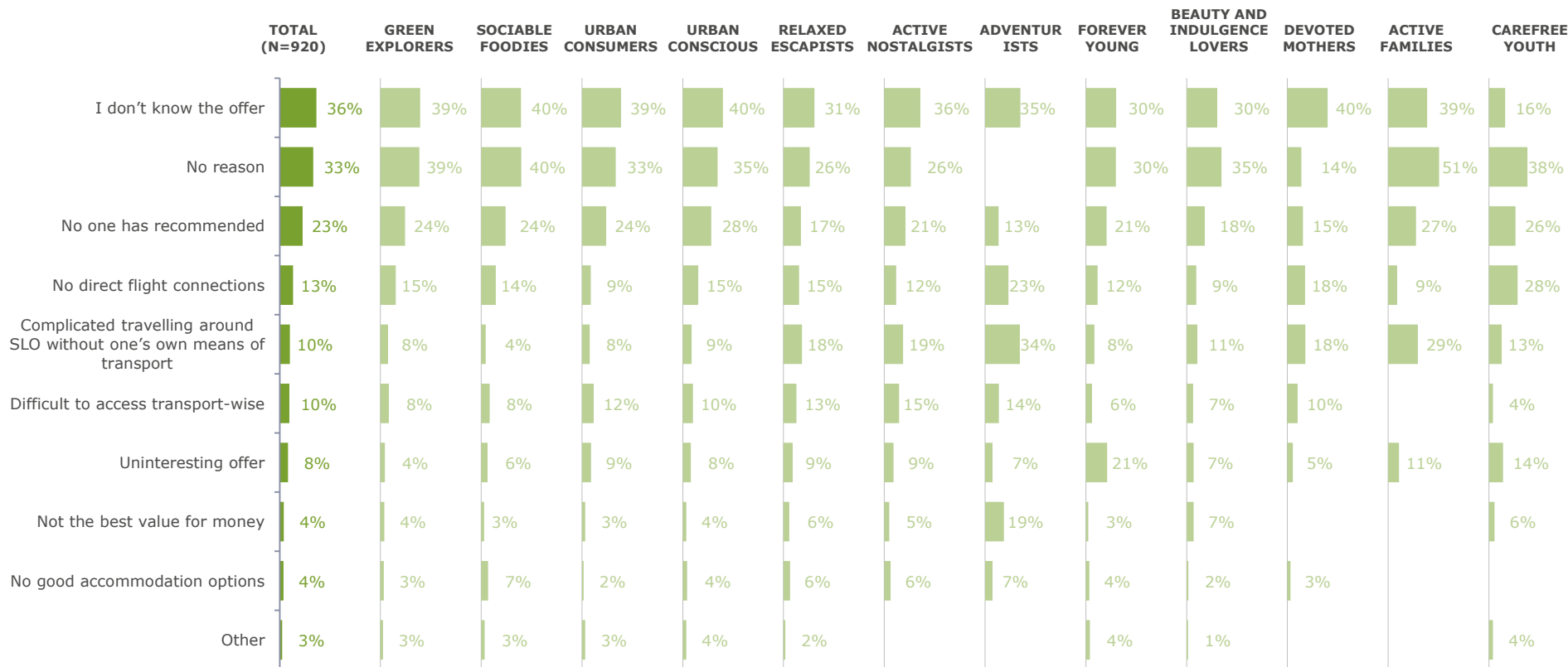


### NOTES:

OTHER STATEMENTS: rich culture, history, diverse nature (lakes, mountains, forests), good and high-quality service, accommodation, easy communication

# ITALY: Reasons for not visiting

Subsample: non-visitors



## 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**

## ITALY: Green explorers (17.1%)



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

In the mountains	63%	+24
Beach	34%	+6

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

TYPE OF  
ACCOMMODATION

Apartments	78%	+29
Small hotels	21%	+6

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

Aeroplane	78%	+4
Train	21%	+6

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

TRANSPORT AT THE  
DESTINATION

Car	73%	+6
Train	26%	+1

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

## ACTIVITIES

Natural sights, nature	79%	+18
Sightseeing in town, the city	79%	+15

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

## MOTIVATION

Recommendations from friends	46%	+11
Past experience	47%	+5
Articles on the Internet	32%	+9

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

## SOURCE OF INFORMATION

Friends, family	48%	+11
Articles on the Internet	60%	+7
Blogs	32%	+9

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

## RESERVATION METHOD

Booking.com	73%	+8
Airbnb	29%	+8
Directly at accommodation	22%	+6

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

## TRAVELLING WITH

As a couple	48%	+4
Friends	24%	+3
Family	26%	-4
Relatives	2%	-1

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

## CHARACTERISTICS:

Size*	6,867,813
Share*	11%
Age	38
Women	43%

Spring	28%
Summer	61%
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.

n=264

# ITALY: 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	40,140,700	27%
Proportion	66%	60%
Age	40	3
Women	48%	2

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

Longer trips

## TRAVELLING WITH:

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

Alone	5%
Relatives	1%

## DESTINATION TYPE:

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

Towns	16%	29%	46%
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5x

Frequency of travelling abroad irrespective of the length

## ACTIVITIES – TOP 10:

Sightseeing a town, the

64%

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

History and castles	51%
Museums, galleries, art	47%
Gastronomic pleasures	47%
Tourist attractions	46%
Live like a local	43%
Shopping	35%

## TRAVEL MOTIVES:

Top 10 – 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)

Retreat from everyday life	8%	28%
Relax, slow down the pace of life	6%	24%
Relaxation	7%	21%
Spend time with partner	4%	20%
Enjoy good food, drinks	2%	18%
Experience diversity	4%	17%

## VISITING COUNTRIES:

France 33% 58%

Top 10 – VISITING OF COUNTRIES AND THE INTENTION OF VISITING AGAIN, whereby a selection of European 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)

Austria	12%	29%
Switzerland	9%	26%
Croatia	8%	22%
Netherlands	9%	21%
Non-European countries	8%	19%
Slovenia	2%	8%

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).

# ITALY: 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



74

MOTORHOME COACH

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?

TRAIN



2

29

To the destination  
At the destination (18% ON FOOT, 6% MOTORCYCLE, 5% BICYCLE)

## PRICE SENSITIVITY:

Accommodation 20% 65% 3%

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

Additional

Food 16% 64% 20%

Shopping 29% 58% 13%

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)

Recommendations	36%	Friends, family	38%	Agency	30%
Articles - the Internet	32%	Travel literature	24%	Airbnb	21%
Travel lectures	25%	Opinions in social media	23%	Accommodation providers	16%

## 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.



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