IDENTIFICATION OF MARKET POTENTIAL

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

RUSSIA

December 2017

Contracting Authority

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INTRODUCTION

I FEEL SLOVENIA

VALICON TOURISM

8 countries

RUSSIA

THE NETHERLANDS

POLAND

UK

GERMANY

AUSTRIA

FRANCE

ITALY

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®

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

- **market structure** (personas)
- **knowledge, experience** and **NPS scale**

About the Contractor

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

Method of implementation	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
Country of implementation	Russia
Implementation period	30 November – 01 December 2017
Target group	Citizens of a certain country, who travel abroad at least once a year for a break, holiday, or a trip and spend at least two nights there.
Sample	Entire sample: n=5,829 Target group: n=1,583 Visitors to Slovenia: n=131 Tourists in Slovenia: n=29
Representativeness	A target person was selected from the sample framework, which was representative of the population aged between 18 and 65. The data were weighted according to gender, age and region.
Survey length	Average duration of the survey: t=24:25.
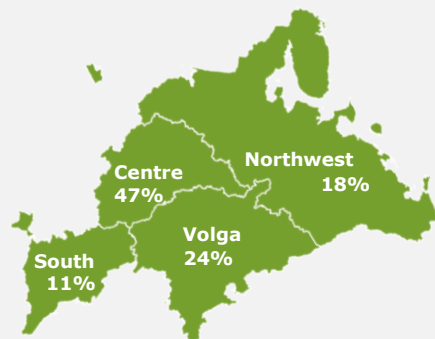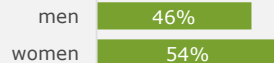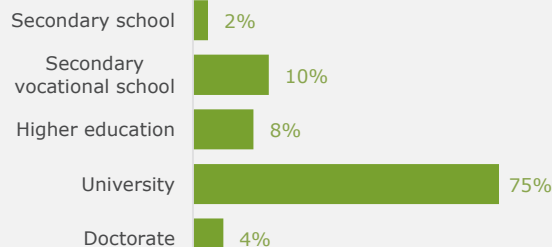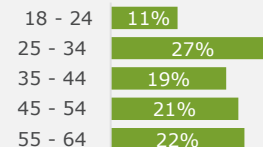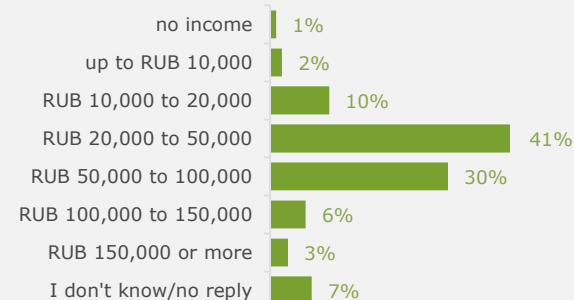
Sample shares and sizes

Bordered ellipses show the basis for share calculations.

Basis: RUSSIA 18–65-year-olds	
POPULATION (18–65 YEARS)	100.0%
TARGET GROUP	27.2%
VISITORS TO SLOVENIA	2.2%
TOURISTS IN SLOVENIA	0.5%

Basis: TARGET GROUP		Absolute size*
POPULATION (18–65 YEARS)	/	97,436,838
TARGET GROUP	100.0%	26,540,211
VISITORS TO SLOVENIA	8.0%	2,183,667
TOURISTS IN SLOVENIA	1.8%	486,324

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

MARKET STRUCTURE AND SIZE (PERSONAS)

STO SLOVENSKA TURISTIČNA ORGANIZACIJA

I FEEL SLOVENIA

NARROW POTENTIAL:

1%

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

	Size*
Total in TG:	293,820
Central	180,763
South	13,584
Northwest	23,037
Volga	76,436

REGIONAL CLASSIFICATION:

Volga 26%
Northwestern 8%
Southern 5%
Central 62%

Top choice	0,3%	
NARROW POTENTIAL Top choice + repeated visit	1%	6%
BROAD POTENTIAL Choice	6%	17%
Visit or choice	7%	7%

RUS / RUSSIAN

n=1568
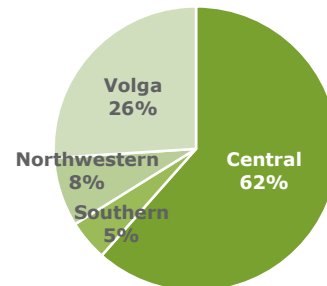
BROAD POTENTIAL:

6%

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

	Size*
Total in TG:	1,485,158
Central	860,666
South	61,367
Northwest	227,150
Volga	335,975

REGIONAL CLASSIFICATION:

Volga 23%
Northwestern 15%
Southern 4%
Central 58%
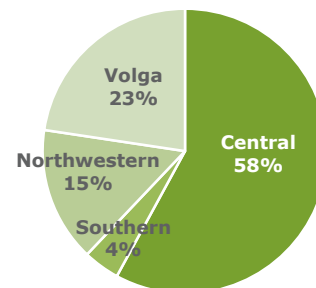
NOTES: The pyramid shows the choice of Slovenia as a tourist destination and is divided into four stages: **1. VISIT OR CHOICE:** The share in the target group (TG) who have stayed in Slovenia at least two nights for a break, holiday or trip or who would choose Slovenia as a tourist destination in the 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.

RUSSIA: Size of segments by regions
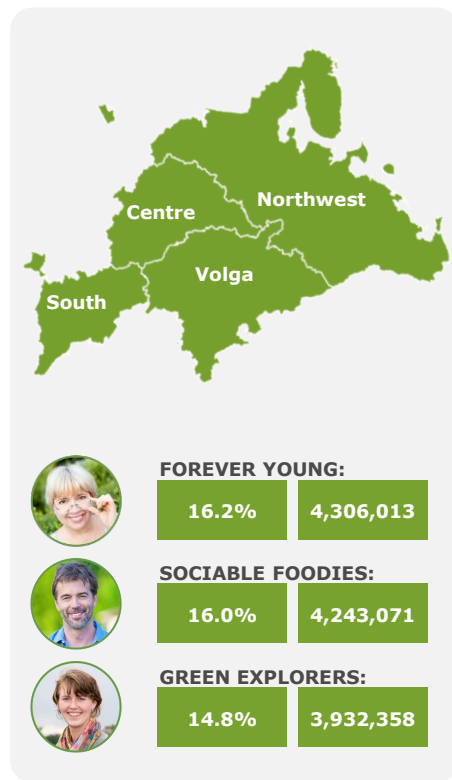
		Total	Central	South	Northwest	Volga
	%	100.0%	46.9%	11.4%	18.2%	23.5%
	Size	26,540,211	12,454,065	3,020,548	4,833,218	6,232,380
GREEN EXPLORERS	%	14.8%	48.3%	8.8%	20.1%	22.8%
	Size	3,932,358	1,898,913	347,229	791,528	894,689
SOCIABLE FOODIES	%	16.0%	45.0%	10.1%	15.5%	29.4%
	Size	4,243,071	1,908,099	426,865	658,744	1,249,362
URBAN CONSUMERS	%	14.6%	49.4%	11.0%	14.9%	24.8%
	Size	3,866,496	1,908,824	423,624	576,917	957,131
URBAN CONSCIOUS	%	7.3%	42.4%	17.9%	23.0%	16.7%
	Size	1,934,903	821,117	346,331	445,052	322,403
RELAXED ESCAPISTS	%	10.2%	43.8%	10.5%	24.0%	21.7%
	Size	2,701,507	1,183,563	284,669	647,538	585,737
ACTIVE NOSTALGISTS	%	2.6%	47.9%	12.1%	21.7%	18.3%
	Size	685,074	328,197	83,212	148,426	125,240
ADVENTURISTS	%	1.3%	51.8%	13.4%	3.9%	30.9%
	Size	357,840	185,398	48,037	13,892	110,512
FOREVER YOUNG	%	16.2%	47.0%	10.7%	19.8%	22.5%
	Size	4,306,013	2,025,335	460,925	852,271	967,482
BEAUTY AND INDULGENCE LOVERS	%	10.7%	49.3%	12.9%	12.6%	25.3%
	Size	2,845,776	1,401,740	366,340	358,210	719,487
DEVOTED MOTHERS	%	1.2%	57.2%	13.1%	20.0%	9.7%
	Size	321,445	183,871	42,139	64,278	31,157
ACTIVE FAMILIES	%	1.4%	45.4%	13.6%	32.2%	8.8%
	Size	369,392	167,715	50,301	118,843	32,533
CAREFREE YOUTH	%	3.7%	44.9%	14.4%	16.6%	24.1%
	Size	976,336	438,584	140,141	162,531	235,080

Northwest

Centre

Volga

South

FOREVER YOUNG:
16.2% | 4,306,013

SOCIABLE FOODIES:
16.0% | 4,243,071

GREEN EXPLORERS:
14.8% | 3,932,358

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.

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DESTINATION TYPE

By the sea	86%
Cities	51%
Cultural and historical centres	50%
In the mountains	39%
Capitals	29%

TYPE OF ACCOMMODATION

Hotel	91%
Apartment	37%
Private accommodation (e.g. Airbnb)	28%
Staying with relatives or friends	24%
Hostel	22%

TRANSPORT TO THE DESTINATION

Aeroplane	88%
Car	6%
Train	3%
Coach	2%
Ship or another vessel	0%

TRANSPORT AT THE DESTINATION

Coach	61%
Car	54%
On foot	24%
Train	22%
Bicycle	4%

ACTIVITIES

Sun and sea	81%
Seeing major tourist attractions	66%
Sightseeing of old town centres	65%
Natural sights, nature	65%
Sightseeing of a town, the capital	59%

MOTIVATION

Past experience	58%
Price of the destination	55%
Recommendations from friends	51%
Articles on the Internet	40%
Suitability of the destination in all seasons	26%

SOURCE OF INFORMATION

Articles on the Internet	68%
Friends, family	47%
Web forums	42%
Web portals (TripAdvisor etc.)	35%
Opinions in social media	32%

RESERVATION METHOD

Agency	63%
Booking.com	41%
Airbnb	13%
Directly at the accommodation provider	12%
Through official TICs	6%

TRAVELLING WITH

Family	41%
As a couple	32%
Friends	14%
Alone	10%
Relatives	2%

CHARACTERISTICS:

Size*	26,540,211	Summer	64%
Share*	27%	Autumn	21%
Age	41	Shorter trips	1
Women	54%	Longer trips	1

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DESTINATION TYPE

Cities	**73%**	**+22**
Capitals	**51%**	**+21**
Cultural and historical centres	57%	+7
By a lake	34%	+11
By the sea	77%	-10

TYPE OF ACCOMMODATION

Staying with relatives or friends	33%	+9
Hostel	31%	+9
Boutique hotel	22%	+11
Apartment	40%	+3
Hotel	90%	-1

TRANSPORT TO THE DESTINATION

Aeroplane	91%	+3
Motorcycle	2%	+2
Car	5%	-1
Motorhome (camper)	2%	+1

TRANSPORT AT THE DESTINATION

Car	66%	+12
Train	**52%**	**+30**
Bicycle	5%	+2
On foot	23%	-1
Coach	49%	-12

ACTIVITIES

Sightseeing of a town, the capital	**84%**	**+24**
Natural sights, nature	77%	+13
Cruises	37%	+16
Health treatments and services	36%	+14
Shopping	51%	+9

MOTIVATION

Articles on the Internet	53%	+14
Past experience	69%	+11
TV programmes	38%	+15
Articles in print media	18%	+11
Suitability of the destination in all seasons	30%	+4

SOURCE OF INFORMATION

Opinions in social media	45%	+13
Friends, family	56%	+9
Articles on the Internet	70%	+2
Articles in print media	21%	+11
Web portals (TripAdvisor etc.)	40%	+5

RESERVATION METHOD

Booking.com	**63%**	**+22**
Directly at the accommodation provider	**28%**	**+16**
Airbnb	24%	+11
Through official TICs	11%	+5
Organiser	11%	+6

TRAVELLING WITH

As a couple	37%	+5
Relatives	9%	+7
Family	32%	-9
Friends	13%	-1
Alone	9%	-1

CHARACTERISTICS:

Size*	486,324		Spring	66%
Share*	0.5%		Summer	15%
Age	46		Shorter trips	2
Women	65%		Longer trips	2

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RUSSIA: Forever young (16.2%)

DESTINATION TYPE

By the sea	84%	-3
Health resorts	**16%**	**+5**
Cultural and historical centres	40%	-10
Spas (wellness and spa)	16%	+1
In the mountains	28%	-10

TYPE OF ACCOMMODATION

Hotel	**95%**	**+4**
Staying with relatives or friends	22%	-2
Own property (holiday cottage)	6%	+0
Apartment	27%	-10
Private accommodation (e.g. Airbnb)	22%	-6

TRANSPORT TO THE DESTINATION

Aeroplane	89%	+1
Car	7%	+1
Ship or another vessel	1%	+0
Train	2%	-1
Bicycle	0%	+0

TRANSPORT AT THE DESTINATION

Coach	63%	+2
On foot	25%	+1
Bicycle	3%	-1
Car	46%	-8
Train	19%	-3

ACTIVITIES

Sightseeing of old town centres	**81%**	**+16**
Sun and sea	82%	+2
Seeing major tourist attractions	**73%**	**+6**
History and castles	**72%**	**+14**
Thermal health spas	**38%**	**+15**

MOTIVATION

Price of the destination	**58%**	**+4**
Recommendations from friends	51%	+0
Suitability of the destination in all seasons	26%	+0
TV programmes	24%	+1
Proximity of the destination	16%	+1

SOURCE OF INFORMATION

Articles on the Internet	66%	-2
Friends, family	46%	-1
Agencies	31%	+1
Web portals (TripAdvisor etc.)	34%	-1
Opinions in social media	32%	-1

RESERVATION METHOD

Agency	**70%**	**+7**
Through official TICs	7%	+1
Directly at the accommodation provider	11%	-1
Agoda.com	3%	+0
Booking.com	37%	-4

TRAVELLING WITH

Family	40%	-1
Alone	**14%**	**+4**
As a couple	31%	-2
Relatives	2%	+0
Friends	13%	-1

CHARACTERISTICS:

Size*	4,306,013	Summer	55%
Share*	4%	Autumn	26%
Age	45	Shorter trips	1
Women	60%	Longer trips	1

RUSSIA: Sociable foodies (16.0%)

DESTINATION TYPE

Cultural and historical centres	76%	+27
Cities	69%	+18
By the sea	93%	+7
Capitals	45%	+15
Elsewhere in nature	28%	+11

TYPE OF ACCOMMODATION

Hotel	96%	+5
Staying with relatives or friends	38%	+13
Boutique hotel	23%	+12
Private accommodation (e.g. Airbnb)	36%	+9
Apartment	41%	+4

TRANSPORT TO THE DESTINATION

Train	6%	+3
Aeroplane	88%	+0
Coach	2%	+0
Car	4%	-2

TRANSPORT AT THE DESTINATION

Car	61%	+7
Coach	65%	+4
Train	27%	+5
On foot	27%	+2
Bicycle	3%	-1

ACTIVITIES

Seeing major tourist attractions	92%	+26
History and castles	88%	+31
Natural sights, nature	89%	+24
Aquafun, amusement parks	65%	+28
Sightseeing of old town centres	87%	+22

MOTIVATION

TV programmes	35%	+13
Suitability of the destination in all seasons	37%	+11
Popularity of the destination	35%	+11
Articles on the Internet	49%	+9
Price of the destination	60%	+5

SOURCE OF INFORMATION

Articles on the Internet	80%	+12
Opinions in social media	41%	+9
Web forums	49%	+8
Friends, family	54%	+7
Agencies	38%	+8

RESERVATION METHOD

Directly at the accommodation provider	19%	+7
Agency	65%	+2
Through official TICs	9%	+3
Organiser	6%	+1
Expedia.com	4%	+2

TRAVELLING WITH

Family	49%	+7
As a couple	31%	-1
Friends	11%	-3
Relatives	3%	+0
Alone	6%	-4

CHARACTERISTICS:

Size*	4,243,071	Summer	71%
Share*	4%	Autumn	18%
Age	40	Shorter trips	1
Women	55%	Longer trips	1

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DESTINATION TYPE

Cultural and historical centres	74%	+24
In the mountains	69%	+30
By the sea	92%	+6
Capitals	46%	+16
By a lake	41%	+18

TYPE OF ACCOMMODATION

Apartment	65%	+28
Private accommodation (e.g. Airbnb)	39%	+11
Hotel	90%	-2
Hostel	23%	+1
Camp	17%	+5

TRANSPORT TO THE DESTINATION

Car	7%	+1
Aeroplane	88%	+0
Coach	2%	+0
Motorcycle	0%	+0
Train	2%	-1

TRANSPORT AT THE DESTINATION

On foot	35%	+11
Car	58%	+3
Train	26%	+5
Bicycle	6%	+2
Coach	60%	-1

ACTIVITIES

Natural sights, nature	84%	+20
Sightseeing of old town centres	81%	+16
Sightseeing of a town, the capital	72%	+13
Seeing major tourist attractions	72%	+6
Sports activities	29%	+13

MOTIVATION

Price of the destination	63%	+8
Articles on the Internet	51%	+11
Suitability of the destination in all seasons	32%	+6
TV programmes	26%	+4
Videos on the Internet	23%	+4

SOURCE OF INFORMATION

Articles on the Internet	74%	+5
Web portals (TripAdvisor etc.)	41%	+6
Friends, family	49%	+3
Web forums	44%	+2
Travel literature	14%	+4

RESERVATION METHOD

Booking.com	57%	+17
Airbnb	20%	+7
Directly at the accommodation provider	15%	+3
Organiser	5%	+0
Other web portal	4%	+2

TRAVELLING WITH

As a couple	42%	+10
Friends	14%	+1
Family	31%	-10
Relatives	3%	+0
Alone	10%	+0

CHARACTERISTICS:

Size*	3,932,358	Summer	65%
Share*	4%	Autumn	21%
Age	41	Shorter trips	1
Women	54%	Longer trips	2

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DESTINATION TYPE

Cities	**74%**	**+23**
By the sea	82%	-5
Cultural and historical centres	44%	-6
Capitals	32%	+2
Spas (wellness and spa)	10%	-5

TYPE OF ACCOMMODATION

Hotel	**95%**	**+3**
Staying with relatives or friends	21%	-4
Apartment	31%	-7
Other	1%	+0
Boutique hotel	7%	-4

TRANSPORT TO THE DESTINATION

Aeroplane	**91%**	**+3**
Coach	**4%**	**+3**
Bicycle	0%	+0
Car	4%	-2
Train	1%	-2

TRANSPORT AT THE DESTINATION

Coach	63%	+2
On foot	26%	+1
Car	51%	-3
Train	22%	+0
Motorcycle	2%	+0

ACTIVITIES

Shopping	**67%**	**+26**
Sightseeing of a town, the capital	**73%**	**+13**
Seeing major tourist attractions	**76%**	**+9**
Gastronomy	**46%**	**+12**
Nightlife (bars, clubs)	**31%**	**+16**

MOTIVATION

Past experience	60%	+1
Recommendations from friends	51%	+0
Popularity of the destination	24%	+0
TV programmes	23%	+0
Web ads	4%	+1

SOURCE OF INFORMATION

Web forums	43%	+2
Opinions in social media	34%	+2
Blogs	28%	+2
Articles on the Internet	67%	-1
Friends, family	46%	-1

RESERVATION METHOD

Agency	62%	+0
Agoda.com	5%	+2
Booking.com	39%	-2
Organiser	5%	+0
Expedia.com	3%	+1

TRAVELLING WITH

Family	42%	+1
As a couple	33%	+1
Friends	15%	+1
Alone	8%	-2
Relatives	2%	-1

CHARACTERISTICS:

Size*	3,866,496		Summer	64%
Share*	4%		Autumn	19%
Age	40		Shorter trips	1
Women	57%		Longer trips	1

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DESTINATION TYPE

By the sea	98%	+11
Spas (wellness and spa)	40%	+25
In the mountains	33%	-6
By a lake	20%	-3
Elsewhere in nature	15%	-2

TYPE OF ACCOMMODATION

Hotel	96%	+5
Own property (holiday cottage)	11%	+5
Apartment	27%	-10
Boutique hotel	9%	-2
Staying with relatives or friends	15%	-10

TRANSPORT TO THE DESTINATION

Aeroplane	95%	+7
Motorcycle	0%	+0
Car	4%	-2
Train	1%	-2

TRANSPORT AT THE DESTINATION

Car	59%	+5
Coach	55%	-6
On foot	18%	-6
Motorhome (camper)	1%	+0
Motorcycle	1%	-2

ACTIVITIES

Sun and sea	93%	+12
Activities and fun for children	53%	+29
Shopping	58%	+16
Aquafun, amusement parks	46%	+9
Thermal health spas	33%	+9

MOTIVATION

Past experience	65%	+7
Price of the destination	62%	+8
Popularity of the destination	28%	+4
Posts on social media, blogs	22%	+0
Proximity of the destination	15%	+1

SOURCE OF INFORMATION

Agencies	43%	+13
Friends, family	44%	-3
Opinions in social media	34%	+2
Articles on the Internet	63%	-5
Web forums	39%	-3

RESERVATION METHOD

Agency	81%	+19
Own accommodation	4%	+0
Through official TICs	5%	-1
At the activity provider	2%	+0
Directly at the accommodation provider	7%	-5

TRAVELLING WITH

Family	68%	+27
Friends	10%	-4
Relatives	3%	+0
As a couple	16%	-16
Alone	2%	-8

CHARACTERISTICS:

Size*	2,845,776		Summer	74%
Share*	3%		Autumn	15%
Age	41		Shorter trips	1
Women	55%		Longer trips	1

RUSSIA: Relaxed escapists (10.2%)

DESTINATION TYPE		
By the sea	83%	-3
Spas (wellness and spa)	19%	+4
Health resorts	17%	+6
In the mountains	29%	-9
Cultural and historical centres	29%	-20

TYPE OF ACCOMMODATION		
Hotel	90%	-2
Own property (holiday cottage)	6%	+0
Camp	10%	-2
Glamping	2%	+1
Other	2%	+1

TRANSPORT TO THE DESTINATION		
Car	13%	+7
Train	5%	+2
Aeroplane	79%	-9
Coach	2%	+0
Ship or another vessel	1%	+0

TRANSPORT AT THE DESTINATION		
Coach	53%	-8
Car	48%	-6
Motorhome (camper)	4%	+3
Bicycle	5%	+1
Train	13%	-9

ACTIVITIES		
Thermal health spas	43%	+20
Natural sights, nature	68%	+3
Gastronomy	34%	+1
Health treatments and services	27%	+6
Cruises	20%	+0

MOTIVATION		
Past experience	58%	-1
Recommendations from friends	47%	-4
Popularity of the destination	21%	-3
Proximity of the destination	14%	-1
Articles on the Internet	31%	-9

SOURCE OF INFORMATION		
Opinions in social media	30%	-3
Friends, family	40%	-7
Web forums	35%	-7
Agencies	26%	-4
Articles in print media	9%	-1

RESERVATION METHOD		
Agency	63%	+0
Organiser	6%	+1
Booking.com	37%	-4
Own accommodation	4%	+0
Airbnb	10%	-3

TRAVELLING WITH		
Friends	19%	+5
Family	35%	-6
As a couple	32%	+0
Alone	10%	+0
Relatives	3%	+1

CHARACTERISTICS:

Size*	2,701,507		Summer	61%
Share*	3%		Autumn	23%
Age	45		Shorter trips	1
Women	60%		Longer trips	1

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=160

I FEEL SLOVENIA

STO SLOVENSKA TURISTIČNA ORGANIZACIJA

DESTINATION TYPE

Cities	**74%**	**+23**
Capitals	**56%**	**+27**
Cultural and historical centres	**64%**	**+14**
Health resorts	11%	-1
By the sea	67%	-19

TYPE OF ACCOMMODATION

Hostel	**57%**	**+35**
Private accommodation (e.g. Airbnb)	**46%**	**+18**
Staying with relatives or friends	**32%**	**+8**
Apartment	41%	+4
Camp	**16%**	**+4**

TRANSPORT TO THE DESTINATION

Aeroplane	89%	+1
Bicycle	**1%**	**+1**
Train	3%	+0
Motorhome (camper)	**1%**	**+1**
Coach	2%	+0

TRANSPORT AT THE DESTINATION

Coach	**74%**	**+13**
Train	**40%**	**+18**
Bicycle	**6%**	**+2**
Car	51%	-3
On foot	23%	-1

ACTIVITIES

Museums, galleries and art	**81%**	**+33**
Learning about the local way of life	**75%**	**+41**
Sightseeing of old town centres	**86%**	**+21**
Sightseeing of a town, the capital	**84%**	**+24**
Social events, festivals	**63%**	**+40**

MOTIVATION

Posts on social media, blogs	**33%**	**+11**
Articles on the Internet	**45%**	**+5**
Price of the destination	58%	+3
Articles in print media	**15%**	**+8**
Past experience	60%	+2

SOURCE OF INFORMATION

Blogs	**42%**	**+16**
Articles on the Internet	72%	+3
Web forums	**48%**	**+7**
Web portals (TripAdvisor etc.)	**44%**	**+9**
Travel presentations	**13%**	**+5**

RESERVATION METHOD

Booking.com	**59%**	**+18**
Airbnb	**30%**	**+17**
Directly at the accommodation provider	**18%**	**+6**
Through official TICs	7%	+1
At the activity provider	4%	+2

TRAVELLING WITH

As a couple	**38%**	**+5**
Friends	**18%**	**+4**
Alone	**16%**	**+6**
Family	27%	-14
Relatives	2%	-1

CHARACTERISTICS:

	1,934,903
Share*	**2%**
Age	**38**
Women	**59%**

Summer	**52%**
Autumn	**24%**
Shorter trips	**1**
Longer trips	**1**

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n=115

24

RUSSIA: Carefree youth (3.7%)

DESTINATION TYPE

By the sea	92%	+5
Cities	73%	+22
Capitals	34%	+4
By a lake	14%	-10
Cultural and historical centres	33%	-16

TYPE OF ACCOMMODATION

Hostel	72%	+50
Private accommodation (e.g. Airbnb)	34%	+6
Staying with relatives or friends	31%	+7
Apartment	33%	-4
Camp	14%	+2

TRANSPORT TO THE DESTINATION

Train	8%	+5
Motorhome (camper)	2%	+2
Car	7%	+1
Ship or another vessel	1%	+1
Aeroplane	82%	-6

TRANSPORT AT THE DESTINATION

Coach	62%	+1
Bicycle	5%	+1
On foot	25%	+1
Car	49%	-5
Motorcycle	3%	+1

ACTIVITIES

Music festivals and concerts	52%	+32
Sightseeing of a town, the capital	70%	+10
Sun and sea	81%	+1
Nightlife (bars, clubs)	34%	+19
Social events, festivals	32%	+9

MOTIVATION

Articles on the Internet	43%	+3
Popularity of the destination	26%	+2
Past experience	53%	-6
Recommendations from friends	44%	-7
Travel literature	9%	+0

SOURCE OF INFORMATION

Friends, family	54%	+7
Web portals (TripAdvisor etc.)	42%	+7
Articles on the Internet	65%	-3
Articles in print media	8%	-1
Web forums	33%	-8

RESERVATION METHOD

Own accommodation	11%	+6
Directly at the accommodation provider	14%	+1
At the activity provider	5%	+3
Through official TICs	7%	+1
Organiser	6%	+2

TRAVELLING WITH

As a couple	39%	+7
Alone	20%	+10
Family	29%	-13
Friends	13%	-1

CHARACTERISTICS:

Size*	976,336	Summer	60%
Share*	1%	Autumn	21%
Age	36	Shorter trips	1
Women	32%	Longer trips	1

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n=58

25

RUSSIA: Active nostalgists (2.6%)

DESTINATION TYPE

In the mountains	**80%**	**+41**
By a lake	**57%**	**+34**
Elsewhere in nature	**46%**	**+29**
By the sea	75%	-11
Countryside	13%	+4

TYPE OF ACCOMMODATION

Hotel	94%	+3
Boutique hotel	**27%**	**+16**
Private accommodation (e.g. Airbnb)	28%	+1
Tourist farm	5%	+2
Apartment	31%	-6

TRANSPORT TO THE DESTINATION

Aeroplane	88%	+0
Car	**11%**	**+4**
Motorcycle	**2%**	**+1**

TRANSPORT AT THE DESTINATION

Car	61%	+6
Motorcycle	9%	+7
Train	20%	-1
Coach	45%	-16
Bicycle	6%	+2

ACTIVITIES

Gastronomy	**51%**	**+17**
Visit to a wine cellar	**42%**	**+24**
Sports activities	**30%**	**+15**
History and castles	59%	+1
Natural sights, nature	60%	-5

MOTIVATION

Recommendations from friends	54%	+4
Suitability of the destination in all seasons	26%	+0
Past experience	49%	-9
Proximity of the destination	10%	-4
Travel literature	8%	-1

SOURCE OF INFORMATION

Friends, family	53%	+6
Web forums	33%	-8
Agencies	27%	-3
Other	3%	+2
Opinions in social media	23%	-9

RESERVATION METHOD

Own accommodation	9%	+5
Through official TICs	8%	+2
Agency	56%	-6
Other	3%	+2
Airbnb	9%	-4

TRAVELLING WITH

Alone	**21%**	**+11**
As a couple	**42%**	**+10**
Relatives	**6%**	**+4**
Family	19%	-22
Friends	11%	-3

CHARACTERISTICS:

Size*	685,074	Summer	62%
Share*	1%	Autumn	24%
Age	40	Shorter trips	2
Women	31%	Longer trips	1

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n=41

26

I FEEL SLOVENIA

STO SLOVENSKA TURISTIČNA ORGANIZACIJA

DESTINATION TYPE

In the mountains	**89%**	**+50**
By a lake	**72%**	**+49**
Elsewhere in nature	**71%**	**+53**
By the sea	83%	-4
Countryside	**26%**	**+16**

TYPE OF ACCOMMODATION

Apartment	**61%**	**+24**
Tourist farm	**27%**	**+25**
Hostel	**38%**	**+16**
Camp	**27%**	**+15**
Camper	**16%**	**+14**

TRANSPORT TO THE DESTINATION

Train	6%	+3
Ship or another vessel	**5%**	**+5**
Aeroplane	86%	-2
Car	3%	-3

TRANSPORT AT THE DESTINATION

Coach	71%	+10
Train	**38%**	**+16**
Bicycle	**14%**	**+10**
Car	57%	+3
On foot	33%	+9

ACTIVITIES

Sports activities	**66%**	**+51**
Water sports activities	**52%**	**+44**
Mountaineering (more challenging tours)	**36%**	**+33**
Winter sports	**43%**	**+32**
Learning about the local way of life	**47%**	**+13**

MOTIVATION

Articles on the Internet	**54%**	**+15**
Posts on social media, blogs	28%	+5
Past experience	56%	-3
Videos on the Internet	24%	+5
Web ads	8%	+6

SOURCE OF INFORMATION

Articles on the Internet	**79%**	**+11**
Web forums	51%	+10
Travel presentations	**33%**	**+26**
Blogs	34%	+8
Friends, family	37%	-10

RESERVATION METHOD

Airbnb	**38%**	**+25**
Booking.com	**56%**	**+15**
Through official TICs	17%	+11
Expedia.com	11%	+8
Agoda.com	11%	+7

TRAVELLING WITH

Family	43%	+2
As a couple	39%	+6
Friends	19%	+5

CHARACTERISTICS:

	369,392		Summer	**49%**
Share*	**0.4%**		Autumn	**14%**
Age	**38**		Shorter trips	**3**
Women	**50%**		Longer trips	**2**

27

RUSSIA: Adventurists (1.3%)

DESTINATION TYPE

In the mountains	**69%**	**+31**
By a lake	**47%**	**+24**
Elsewhere in nature	**38%**	**+21**
By the sea	65%	-21
Countryside	10%	+1

TYPE OF ACCOMMODATION

Camp	**39%**	**+27**
Camper	**37%**	**+35**
Hostel	**40%**	**+19**
Tourist farm	**15%**	**+13**
Hotel	72%	-20

TRANSPORT TO THE DESTINATION

Motorcycle	**5%**	**+4**
Aeroplane	89%	+1
Ship or another vessel	**2%**	**+2**
Car	4%	-2

TRANSPORT AT THE DESTINATION

Car	**81%**	**+27**
Bicycle	**8%**	**+4**
On foot	18%	-6
Coach	35%	-26
Motorcycle	5%	+2

ACTIVITIES

Adrenaline sports challenges	**51%**	**+46**
History and castles	**75%**	**+18**
Water sports activities	**38%**	**+30**
Social events, festivals	31%	+9
Natural sights, nature	63%	-2

MOTIVATION

Popularity of the destination	**34%**	**+10**
Posts on social media, blogs	**34%**	**+11**
Recommendations from friends	52%	+1
Suitability of the destination in all seasons	30%	+4
Proximity of the destination	17%	+3

SOURCE OF INFORMATION

Articles in print media	**28%**	**+18**
Articles on the Internet	59%	-9
Friends, family	37%	-10
Travel presentations	**15%**	**+8**
Opinions in social media	20%	-13

RESERVATION METHOD

Airbnb	20%	+7
Agency	62%	+0
Own accommodation	5%	+0
Agoda.com	4%	+1
At the activity provider	4%	+1

TRAVELLING WITH

Family	**54%**	**+13**
Alone	**23%**	**+13**
Friends	19%	+5
As a couple	4%	-28

CHARACTERISTICS:

Size*	357,840		Summer	76%
Share*	0.4%		Autumn	7%
Age	33		Shorter trips	2
Women	49%		Longer trips	1

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n=21

28

I FEEL SLOVENIA

RUSSIA: Devoted mothers (1.2%)

DESTINATION TYPE

By a lake	66%	+42
In the mountains	59%	+21
Countryside	16%	+7
By the sea	64%	-23
Cultural and historical centres	34%	-15

TYPE OF ACCOMMODATION

Camp	35%	+23
Apartment	56%	+19
Staying with relatives or friends	35%	+11
Tourist farm	9%	+7
Boutique hotel	15%	+4

TRANSPORT TO THE DESTINATION

Car	13%	+7
Motorhome (camper)	6%	+5
Coach	4%	+3
Aeroplane	74%	-14
Train	3%	+0

TRANSPORT AT THE DESTINATION

Car	59%	+5
Motorcycle	5%	+2
Coach	47%	-14
Train	15%	-7
Bicycle	3%	+0

ACTIVITIES

Sports activities	43%	+27
Aquafun, amusement parks	48%	+11
Fishing	34%	+22
Recreation	24%	+13
Countryside, farm activities	21%	+17

MOTIVATION

Past experience	63%	+5
Proximity of the destination	24%	+10
Articles on the Internet	40%	+0
Travel literature	15%	+6
TV programmes	21%	-1

SOURCE OF INFORMATION

Travel presentations	18%	+10
Friends, family	38%	-9
Articles on the Internet	57%	-11
Opinions in social media	27%	-5
Blogs	21%	-5

RESERVATION METHOD

Own accommodation	16%	+12
Agency	58%	-4
Through official TICs	12%	+6
At the activity provider	8%	+5
Agoda.com	3%	+0

TRAVELLING WITH

Family	47%	+5
As a couple	34%	+1
Friends	13%	-1
Alone	7%	-3

CHARACTERISTICS:

	321,445	Summer	76%
Share*	3%	Autumn	19%
Age	43	Shorter trips	2
Women	16%	Longer trips	1

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n=19

29

RUSSIA: Price sensitivity

	CHOICE OF ACCOMMODATION			CHOICE OF DESTINATION			CHOICE OF TRANSPORT		
	seek	assess	disregard	seek	assess	disregard	seek	assess	disregard
TOTAL	15%	84%	1%	12%	80%	8%	30%	65%	5%
GREEN EXPLORERS	14%	85%	0%	11%	79%	9%	34%	61%	5%
SOCIABLE FOODIES	8%	91%	1%	10%	81%	9%	31%	66%	4%
URBAN CONSUMERS	12%	87%	1%	9%	81%	10%	26%	67%	7%
URBAN CONSCIOUS	14%	83%	2%	9%	77%	14%	34%	60%	6%
RELAXED ESCAPISTS	14%	84%	1%	16%	78%	6%	25%	71%	4%
ACTIVE NOSTALGISTS	17%	76%	7%	15%	69%	16%	25%	66%	9%
ADVENTURISTS	17%	83%	0%	7%	80%	13%	16%	49%	34%
FOREVER YOUNG	16%	82%	1%	10%	85%	4%	31%	64%	5%
BEAUTY AND INDULGENCE LOVERS	15%	83%	2%	12%	83%	4%	22%	74%	4%
DEVOTED MOTHERS	9%	86%	5%	18%	72%	10%	31%	65%	4%
ACTIVE FAMILIES	35%	65%	0%	13%	87%	0%	48%	47%	5%
CAREFREE YOUTH	42%	58%	0%	24%	65%	11%	40%	55%	5%
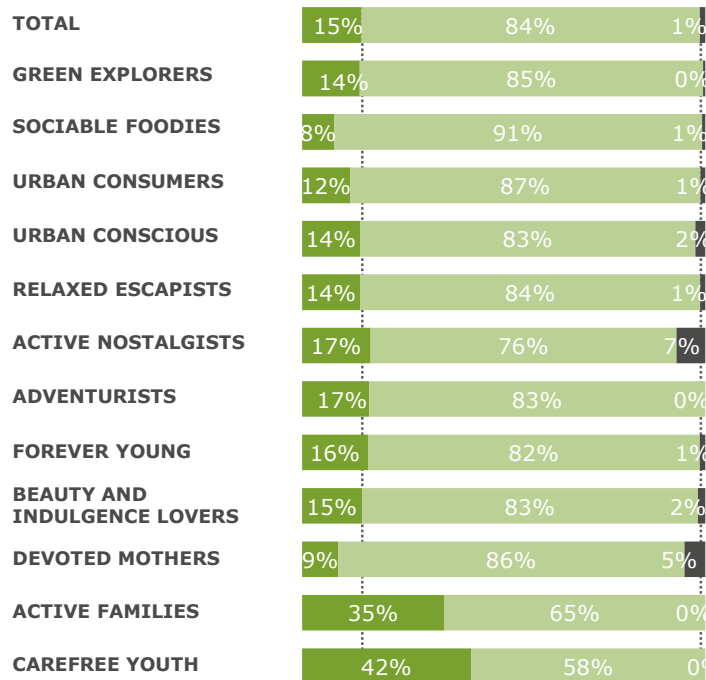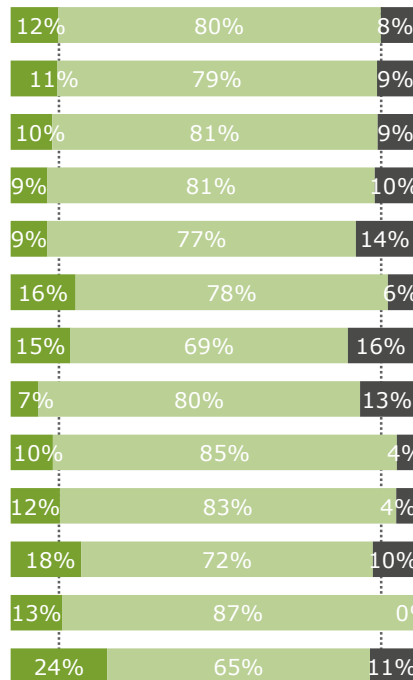
■ seek the most favourable offer   ■ assess value for money   ■ disregard the price

30

RUSSIA: Price sensitivity

	CHOICE OF ADDITIONAL ACTIVITIES			CHOICE OF FOOD			SHOPPING		
	seek the most favourable offer	assess value for money	disregard the price	seek the most favourable offer	assess value for money	disregard the price	seek the most favourable offer	assess value for money	disregard the price
TOTAL	23%	69%	9%	10%	79%	11%	25%	67%	8%
GREEN EXPLORERS	22%	67%	11%	12%	79%	9%	28%	64%	8%
SOCIABLE FOODIES	19%	72%	9%	6%	82%	12%	21%	70%	9%
URBAN CONSUMERS	20%	71%	9%	10%	77%	13%	23%	69%	8%
URBAN CONSCIOUS	27%	60%	13%	11%	77%	13%	34%	57%	9%
RELAXED ESCAPISTS	24%	69%	8%	12%	78%	10%	20%	70%	10%
ACTIVE NOSTALGISTS	19%	68%	13%	12%	75%	13%	24%	60%	16%
ADVENTURISTS	7%	75%	18%	22%	76%	2%	31%	69%	0%
FOREVER YOUNG	28%	68%	5%	9%	82%	9%	30%	64%	7%
BEAUTY AND INDULGENCE LOVERS	18%	76%	6%	8%	82%	10%	17%	75%	8%
DEVOTED MOTHERS	24%	69%	7%	12%	69%	19%	22%	74%	4%
ACTIVE FAMILIES	30%	70%	0%	16%	84%	0%	20%	73%	7%
CAREFREE YOUTH	35%	55%	11%	20%	65%	15%	40%	54%	6%
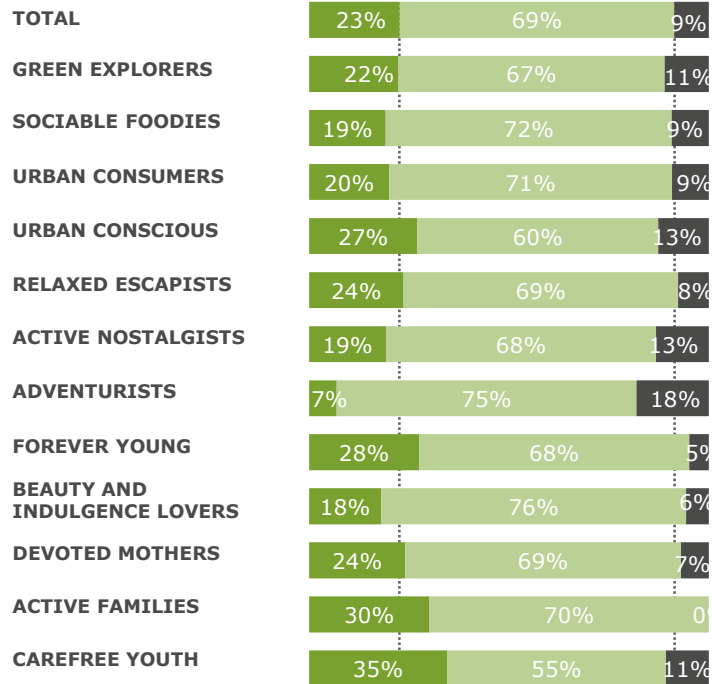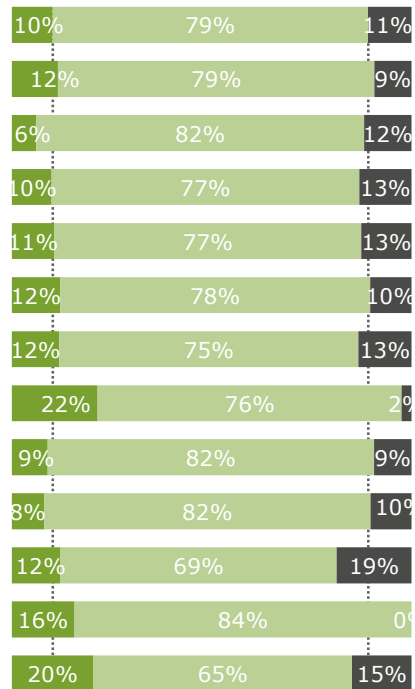
■ seek the most favourable offer ■ assess value for money ■ disregard the price

31

Number of countries visited during one trip, break or holiday

	TOTAL (N=1546)	GREEN EXPLORERS	SOCIABLE FOODIES	URBAN CONSUMERS	URBAN CONSCIOUS	RELAXED ESCAPISTS	ACTIVE NOSTALGISTS	ADVENTURISTS	FOREVER YOUNG	BEAUTY AND INDULGENCE LOVERS	DEVOTED MOTHERS	ACTIVE FAMILIES	CAREFREE YOUTH
One	78%	70%	78%	82%	65%	79%	94%	89%	83%	84%	82%	70%	69%
Two	18%	25%	19%	15%	30%	20%	2%	11%	13%	13%	18%	20%	28%
Three or more	4%	5%	3%	3%	5%	1%	4%	0%	4%	3%	0%	11%	3%
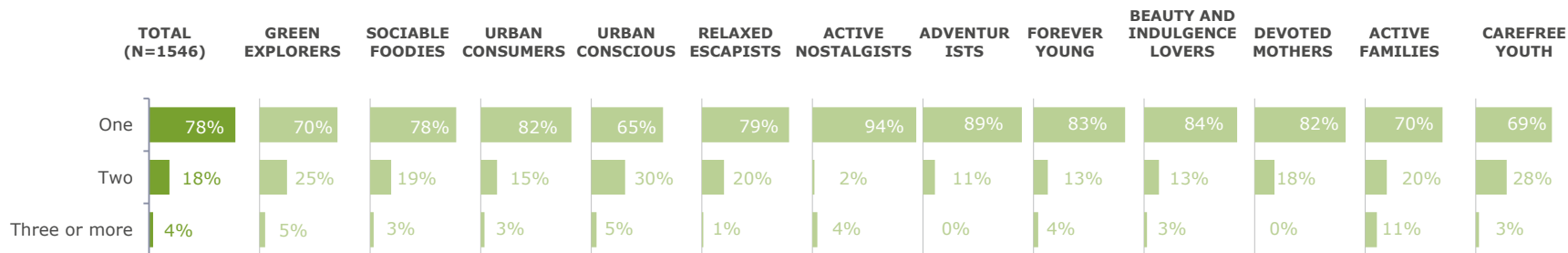
Exploring in one country

	TOTAL (N=1546)	GREEN EXPLORERS	SOCIABLE FOODIES	URBAN CONSUMERS	URBAN CONSCIOUS	RELAXED ESCAPISTS	ACTIVE NOSTALGISTS	ADVENTURISTS	FOREVER YOUNG	BEAUTY AND INDULGENCE LOVERS	DEVOTED MOTHERS	ACTIVE FAMILIES	CAREFREE YOUTH
If possible, I explore the entire country	8%	10%	11%	4%	8%	8%		3%	9%	4%	3%	29%	9%
I explore a larger area	14%	22%	18%	11%	22%	9%	17%	7%	12%	9%		24%	7%
No preference	29%	31%	31%	33%	26%	24%	20%	22%	30%	27%	14%	13%	36%
I only visit the immediate vicinity	45%	35%	39%	48%	42%	55%	56%	60%	45%	55%	73%	32%	40%
I stay in one place	3%	2%	1%	4%	1%	4%	7%	8%	3%	5%	10%	3%	8%

32

GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY

RUSSIA: General travel habits and motives

CHARACTERISTICS OF THE TARGET GROUP:

Size	26,540,211		Summer	64%
Proportion	27.2%		Autumn	21%
Age	41		Shorter trips	1
Women	54%		Longer trips	1

TRAVELLING WITH:

- As a couple: 49%
- Family: 34%
- Friends: 14%
- Alone: 3%

DESTINATION TYPE:

- By the sea: 66% / 20% / 86%
- Towns: 13% / 38% / 51%
- Cult. and hist. centres: 8% / 41% / 50%

2x a year travels abroad

ACTIVITIES – TOP 10:

- Sun and Sea: 81%
- Tourist attractions: 66%
- Sightseeing of old town centres: 65%
- Nature parks, attractions: 65%
- Sightseeing of a town, the capital: 59%
- History and castles: 58%
- Museums, galleries, art: 48%
- Shopping: 41%
- Aquafun, amusement parks: 37%
- Live like a local: 34%

TRAVEL MOTIVES – TOP 10:

- To learn something new: 25% / 54%
- Visit a beautiful destination: 12% / 53%
- Experience another culture: 9% / 38%
- Visit a town, the capital: 10% / 32%
- Enjoy good food, drinks: 2% / 27%
- Rest, slow down the pace of life: 10% / 27%
- Experience diversity: 6% / 26%
- Spend time with family, strengthen bonds: 4% / 16%
- Take care of one self, be restored: 4% / 16%
- Spend time with partner: 4% / 15%

VISITING COUNTRIES – TOP 10:

- Turkey: 36% / 57%
- Russia: 20% / 46%
- Spain: 25% / 32%
- Greece: 21% / 31%
- Non-European countries: 20% / 31%
- Czechia: 20% / 30%
- Italy: 22% / 28%
- Cyprus: 17% / 28%
- Ukraine: 6% / 27%
- Germany: 17% / 26%
- Slovenia: 1% / 2%

Legend: ■ 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).

RUSSIA: Elements of the purchase journey and consumption

TYPE OF ACCOMMODATION:

91% **37%** **28%**

Other frequent accommodation types:

Relatives, friends: 24%
Hostel: 22%
Camp: 12%

RESERVATION

UP TO 3 months in advance

85%

TRANSPORT MODE (%):

AIRPLANE **CAR** **TRAIN** **COACH**

| 88 | - | 6 | 54 | 3 | 22 | 2 | 61 |

☐ To the destination

☐ At the destination (24% ON FOOT, 4% BICYCLE, 2% MOTORCYCLE)

PRICE SENSITIVITY:
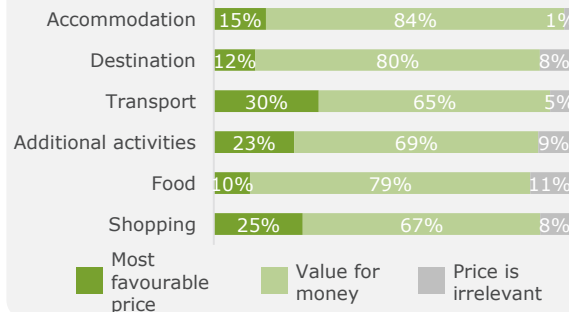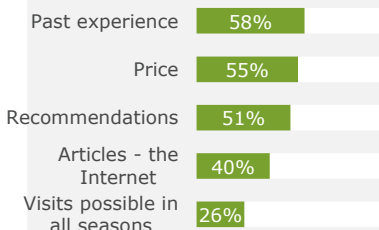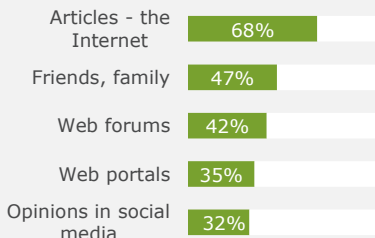
	Most favourable price	Value for money	Price is irrelevant
Accommodation	15%	84%	1%
Destination	12%	80%	8%
Transport	30%	65%	5%
Additional activities	23%	69%	9%
Food	10%	79%	11%
Shopping	25%	67%	8%

PURCHASE JOURNEY:

MOTIVATIONS:

Past experience	58%
Price	55%
Recommendations	51%
Articles - the Internet	40%
Visits possible in all seasons	26%

SOURCES OF INFORMATION:

Articles - the Internet	68%
Friends, family	47%
Web forums	42%
Web portals	35%
Opinions in social media	32%

RESERVATION METHOD:

Agency	63%
Booking.com	41%
Airbnb	13
Accommodation providers	12
Official tourist info. centre	6
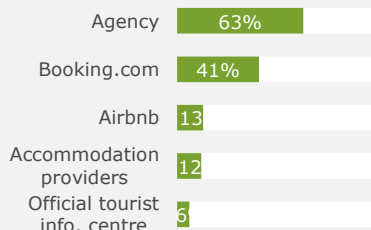
BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other *per person/day*	€27	€28
TRANSPORT *per person*	€65	€68

35

RUSSIA: General travel habits and motives
Subsample: visitors to Slovenia

CHARACTERISTICS OF VISITORS TO SLOVENIA:

Size	2,183,667
Proportion	2.2%
Age	42
Women	58%

Summer	64%
Autumn	15%
Shorter trips	2
Longer trips	2

TRAVELLING WITH:

Family	38%
Couple	34%
Friends	20%
Alone	6%
Relatives	3%

DESTINATION TYPE:

By the sea	51% / 28%	79%
Towns	18% / 45%	63%
Cult. and hist. centres	10% / 41%	51%

4x a year travels abroad

ACTIVITIES – TOP 10:

Sun and sea	69%
Sightseeing of old town centres	60%
Tourist attractions	58%
Nature parks, attractions	57%
Sighteeing of a town, the capital	56%
History and castles	54%
Museums, galleries, art	47%
Shopping	40%
Live like a local	36%
Gastronomic pleasures	35%

TRAVEL MOTIVES – TOP 10:

Visit a beautiful destination	12%	49%
To learn something new	19%	48%
Visit a town, the capital	10%	44%
Experience another culture	7%	35%
Experience diversity	5%	24%
Enjoy good food, drinks	0%	21%
Rest, slow down the pace of life	8%	16%
Take care of oneself, be restored	5%	15%
Spend time actively	3%	14%
Spend time with partner	4%	13%

VISITING COUNTRIES – TOP 10:

Turkey	26%	55%
Greece	27%	50%
Spain	28%	49%
Italy	34%	49%
Czechia	24%	48%
France	29%	43%
Germany	24%	42%
Cyprus	23%	38%
Russia	15%	38%
Bulgaria	13%	29%
Slovenia	10%	22%

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).

STO SLOVENSKA TURISTIČNA ORGANIZACIJA

I FEEL SLOVENIA

TYPE OF ACCOMMODATION:

HOTEL 88% 41% 29%

Other frequent accommodation types:

Private accommodation: 25%
Relatives, friends: 21%
Camp: 20%

RESERVATION

UP TO 3 months in advance

83%

TRANSPORT MODE (%):

AIRPLANE	CAR	MOTORHOME	COACH	MOTORCYCLE

85	-	10	68	3	2	1	51	1	4

☐ To the destination

☐ At the destination **(34% TRAIN, 24% ON FOOT, 6% BICYCLE)**

PRICE SENSITIVITY:

	Most favourable price	Value for money	Price is irrelevant
Accommodation	34%	59%	8%
Destination	23%	58%	18%
Transport	31%	55%	14%
Additional activities	22%	61%	17%
Food	23%	57%	20%
Shopping	26%	55%	19%

PURCHASE JOURNEY:

MOTIVATIONS:

Past experience	68%
Articles - the Internet	45%
Price	44%
Recommendations	36%
Posts on social media, blogs	27%

SOURCES OF INFORMATION:

Articles - the Internet	63%
Friends, family	47%
Web forums	39%
Opinions in social media	34%
Web portals	32%

RESERVATION METHOD:

Agency	54%
Booking.com	52%
Airbnb	20%
Accommodation providers	17%
Various organisers	9%

BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other *per person/day*	€29	€32
TRANSPORT *per person*	€58	€62

RUSSIA: General travel habits and motives
Subsample: tourists in Slovenia

CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size	**486,324**
Proportion	**0.5%**
Age	**46**
Women	**65%**

Summer	**66%**
Autumn	**15%**
Shorter trips	**2**
Longer trips	**2**

TRAVELLING WITH:

As a couple	37%
Family	32%
Friends	13%
Alone	9%
Relatives	9%

DESTINATION TYPE:

	Repeated visit	Visit	Total
By the sea	39%	38%	77%
Towns	21%	52%	73%
Cult. and hist. centres	18%	38%	57%

4x a year travels abroad

ACTIVITIES – TOP 10:

Sightseeing of a town, the capital	84%
Sun and sea	82%
Nature parks, attractions	77%
Sightseeing of old town centres	65%
Tourist attractions	65%
History and castles	60%
Shopping	51%
Museums, galleries, art	47%
Live like a local	44%
Gastronomic pleasures	43%

TRAVEL MOTIVES – TOP 10:

	Repeated	Total
Sightseeing of a town, the capital	29%	50%
Visit a beautiful destination	8%	42%
To learn something new	12%	40%
Experience another culture	12%	31%
Experience diversity	6%	30%
Enjoy good food, drinks	2%	25%
Take care of oneself, be restored	0%	25%
Take care of one's health	1%	22%
Spend time actively	8%	19%
Spend time with friends	3%	19%

VISITING COUNTRIES – TOP 10:

	Repeated visit	Total
Slovenia	45%	100%
Czechia	25%	79%
Turkey	27%	73%
Germany	35%	66%
Italy	49%	64%
Spain	41%	64%
Greece	30%	59%
France	38%	54%
Cyprus	34%	50%
Estonia	18%	49%

Repeated visit
Visit

RUSSIA: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia

TYPE OF ACCOMMODATION:

HOTEL 90%   40%   33%

Other frequent accommodation types:

Hostel: 31%
Private accommodation: 26%
Boutique hotel: 22%

RESERVATION

UP TO 3 months in advance

79%

TRANSPORT MODE (%):

AIRPLANE	CAR	MOTORCYCLE	MOTORHOME
91 -	5 66	2 2	2 -

☐ To the destination

▨ At the destination **(52% TRAIN, 49% COACH, 23% ON FOOT)**

PRICE SENSITIVITY:
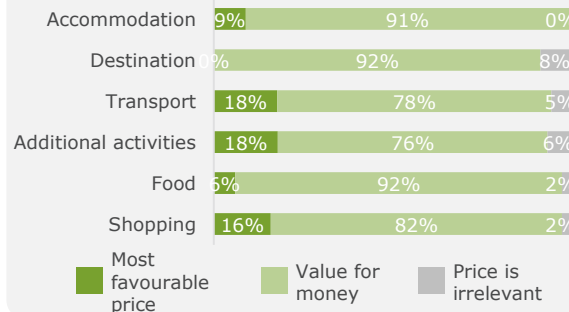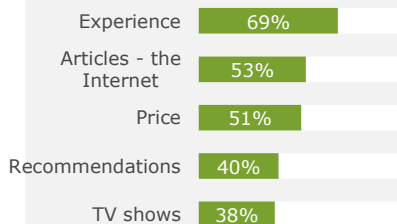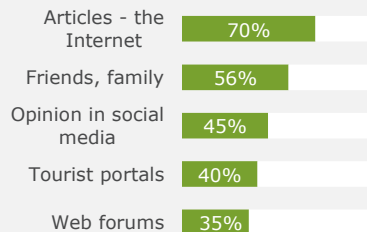
	Most favourable price	Value for money	Price is irrelevant
Accommodation	9%	91%	0%
Destination	0%	92%	8%
Transport	18%	78%	5%
Additional activities	18%	76%	6%
Food	6%	92%	2%
Shopping	16%	82%	2%

PURCHASE JOURNEY:

MOTIVATIONS:

Experience	69%
Articles - the Internet	53%
Price	51%
Recommendations	40%
TV shows	38%

SOURCES OF INFORMATION:

Articles - the Internet	70%
Friends, family	56%
Opinion in social media	45%
Tourist portals	40%
Web forums	35%

RESERVATION METHOD:

Booking.com	63%
Agency	46%
Accommodation providers	28%
Airbnb	24%
Official tourist info. centre	11
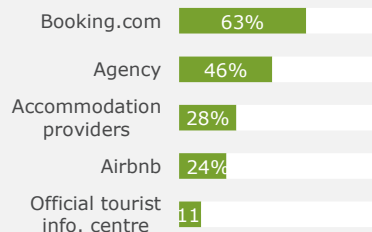
BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other *per person/day*	in Europe	€34	€32
	in SLO	€44	€ 44
TRANSPORT *per person*	in Europe	€71	€73
	in SLO	€139	€151

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

RUSSIA: Destination relevance
Share of visitors by popularity of the destination

ON THE RISE

TOP DESTINATIONS

% of losing – % of gaining popularity

- Czech Republic
- Ireland
- Croatia
- Switzerland
- Italy
- Austria
- 0
- Hungary
- France
- Slovakia
- Slovenia

OVERLOOKED

- Estonia

TRADITIONALLY FREQUENTED

-37

0   13

% of tourists at the destination

41

RUSSIA: Slovenia's relevance

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

WORTHY OF INVESTING

IN FOCUS

% of losing – % of gaining popularity

- Devoted mothers
- Active families
- Relaxed escapists
- Green explorers
- Urban conscious
- Forever young

5

- Beauty and indulgence lovers
- Carefree youth
- Active nostalgists
- Sociable foodies
- Urban consumers

- Adventurists

-41 **LESS IMPORTANT**

0

2

WORTHY OF ATTENTION

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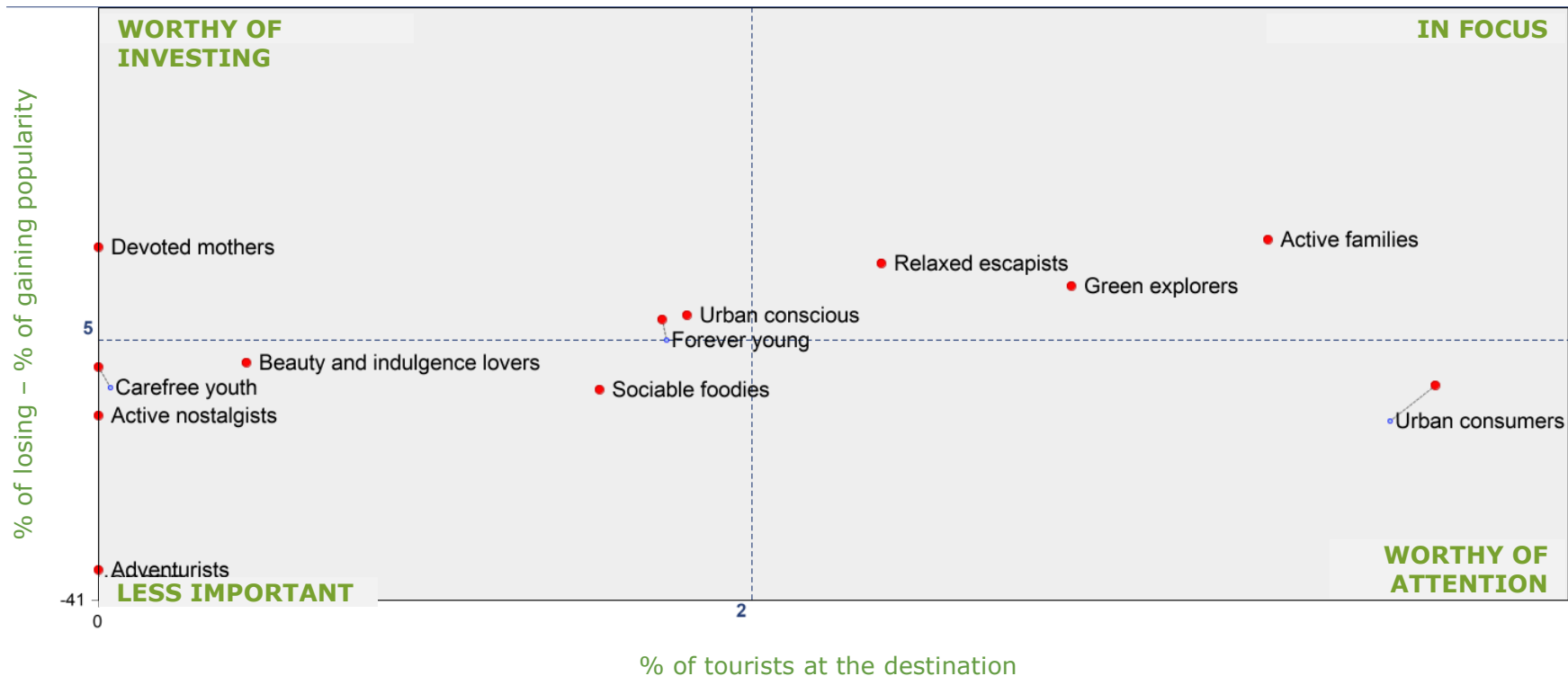
NOTES: The chart shows the share of visitors according to the ratio of gaining – losing popularity (destination % losing – % gaining).
The percentage of tourists at the destination shows the visitor frequency of the destination (the largest shares of tourists are at destinations in the right quadrant).

42

BOUTIQUE

15 % | different from mass tourism
6 % | unique accommodation
5 % | tourists prepared to pay more
7 % | unique experiences
4 % | offer for demanding tourists

GREEN

green | 13 %
sustainable tourism | 7 %
takes care of the natural environment | 5 %
abundant natural surroundings | 7 %

CULTURE

12 % | for explorers
3 % | rich gastronomic offer
3 % | for urban tourists
3 % | rich culture and art

SLOVENIA

ACTIVE

easy walks in nature | 16 %
relaxation in nature | 13 %
adventurous holidays | 7 %
diverse sports activities | 6 %
adrenaline holidays | 7 %

IMPRESSION

19 % | offers value for money
13 % | open and hospitable
11 % | family-friendly
3 % | in trend
3 % | romantic holidays for couples

HEALTHY

peace and relaxation | 13 %
wellness and spa offer | 11 %
healthy lifestyle | 9 %

Relevance of the brand
losing popularity | 21 %
gaining popularity | 16 %

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.

RUSSIA: 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)

Impact of the image element on selecting Slovenia as a destination for a holiday or a break

- easy walks in nature
- peace and relaxation
- green
- tourists prepared to pay more
- family-friendly
- offers value for money
- relaxation in nature
- unique experiences
- healthy lifestyle
- open and hospitable
- diverse sports activities
- wellness and spa offer
- sustainable tourism
- abundant natural surroundings
- for explorers
- in trend
- different from mass tourism
- unique accommodation
- for urban tourists
- takes care of the natural environment
- romantic holidays for couples
- offer for demanding tourists
- rich gastronomic offer
- adrenaline holidays
- rich culture and art
- adventurous holidays

Weaker association of Slovenia ← → Stronger association of Slovenia

-14   5   0   5

1

7

44

BOUTIQUE

17 % different from mass tourism
14 % tourists prepared to pay more
13 % unique accommodation
13 % unique experiences
11 % offer for demanding tourists

GREEN

takes care of the natural environment 31 %
green 33 %
abundant natural surroundings 29 %
sustainable tourism 14 %

CULTURE

11 % for explorers
8 % for urban tourists
11 % rich gastronomic offer
8 % rich culture and art

SLOVENIA

ACTIVE

easy walks in nature 51 %
relaxation in nature 51 %
diverse sports activities 32 %
adrenaline holidays 19 %
adventurous holidays 10 %

IMPRESSION

61 % offers value for money
41 % open and hospitable
35 % family-friendly
10 % in trend
8 % romantic holidays for couples

HEALTHY

peace and relaxation 50 %
wellness and spa offer 44 %
healthy lifestyle 36 %

Relevance of the brand
gaining popularity 24 %
losing popularity 12 %

Warning: low numerus

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.

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RUSSIA: 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)

Impact of the image element on selecting Slovenia as a destination for a holiday or a break

- easy walks in nature
- peace and relaxation
- tourists prepared to pay more
- green
- offers value for money
- family-friendly
- relaxation in nature
- healthy lifestyle
- wellness and spa offer
- open and hospitable
- unique experiences
- diverse sports activities
- sustainable tourism
- abundant natural surroundings
- for explorers
- different from mass tourism
- in trend
- unique accommodation
- takes care of the natural environment
- for urban tourists
- romantic holidays for couples
- offer for demanding tourists
- rich gastronomic offer
- adrenaline holidays
- adventurous holidays
- rich culture and art

Warning: low numerus

-42   5   0   5

Weaker association of Slovenia ← → Stronger association of Slovenia   **Basis: tourists in 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.

46

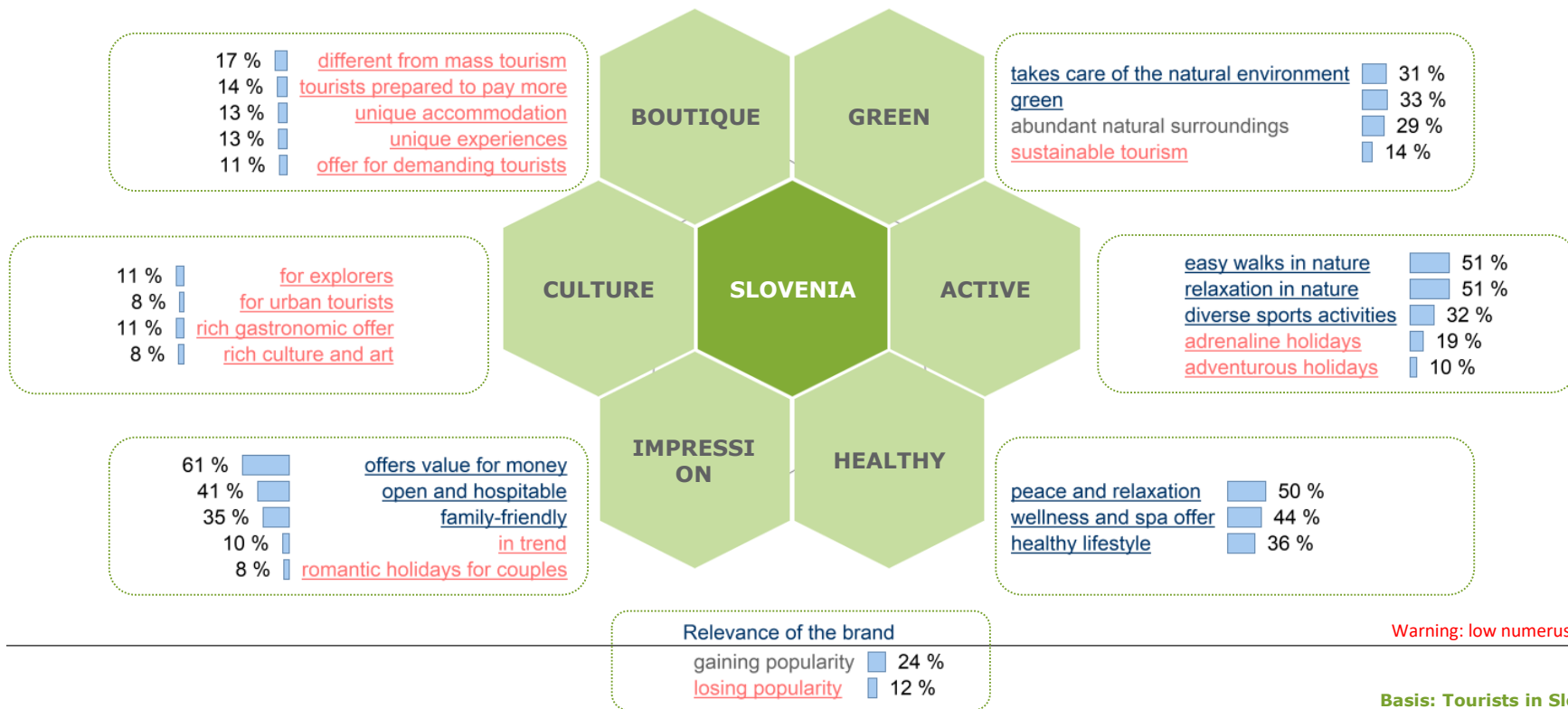|	Slovenia	Italy	Czech Republic	France	Austria	Estonia	Croatia	Switzerland	Hungary	Slovakia	Ireland
losing popularity	21	10	8	18	7	42	15	6	19	21	9
offers value for money	19	28	51	11	8	15	28	5	18	20	5
easy walks in nature	16	24	22	14	22	12	28	28	13	14	19
gaining popularity	16	21	23	15	15	9	30	15	16	16	22
different from mass tourism	15	15	15	11	20	13	15	29	16	12	41
green	13	22	14	13	22	7	26	42	12	9	33
open and hospitable	13	48	41	27	13	6	21	14	13	13	8
relaxation in nature	13	25	16	11	25	7	32	48	10	12	28
peace and relaxation	13	29	26	17	21	11	22	39	11	11	16
for explorers	12	28	17	21	19	8	18	23	12	10	38
family-friendly	11	44	37	26	16	8	31	21	11	10	6
wellness and spa offer	11	21	30	17	22	6	20	43	18	10	7
healthy lifestyle	9	20	16	15	32	8	14	52	9	7	16
adventurous holidays	7	34	14	24	20	6	18	27	12	9	37
abundant natural surroundings	7	31	12	16	30	5	24	59	8	7	37
sustainable tourism	7	45	32	36	19	5	17	24	9	8	7
adrenaline holidays	7	20	6	13	44	6	15	50	7	7	27
unique experiences	7	36	19	31	17	6	14	35	8	5	39
diverse sports activities	6	25	11	20	40	5	12	47	6	8	10
unique accommodation	6	29	20	30	20	6	11	37	9	7	23
takes care of the natural environment	5	16	15	16	33	7	12	56	6	5	21
tourists prepared to pay more	5	33	15	32	16	4	9	37	5	4	19
offer for demanding tourists	4	39	13	49	28	3	6	51	4	3	6
romantic holidays for couples	3	57	26	68	13	4	11	23	5	4	7
rich gastronomic offer	3	61	31	55	12	3	9	16	12	4	7
in trend	3	48	19	51	16	3	10	29	4	4	7
for urban tourists	3	47	39	57	22	7	4	13	10	3	4
rich culture and art	3	67	26	66	21	3	4	12	8	3	7

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.

	Slovenia	Italy	Czech Republic	France	Austria	Estonia	Croatia	Switzerland	Hungary	Slovakia	Ireland
losing popularity	13	18	10	5	11	35	0	20	10	14	7
offers value for money	9	5	29	17	14	7	11	27	8	11	13
easy walks in nature	6	10	0	15	1	3	11	4	2	5	0
gaining popularity	7	11	2	12	5	1	14	15	6	8	4
different from mass tourism	6	17	6	16	0	5	2	2	6	3	23
green	4	12	8	16	0	1	9	9	1	0	15
open and hospitable	3	13	18	2	9	2	3	19	2	4	11
relaxation in nature	3	12	8	20	2	2	13	13	1	2	8
peace and relaxation	3	5	3	12	1	2	4	7	0	2	3
for explorers	3	5	5	7	3	0	1	8	2	1	20
family-friendly	1	9	13	4	6	1	12	12	0	0	14
wellness and spa offer	2	12	8	10	1	2	3	12	7	1	11
healthy lifestyle	0	12	5	12	11	0	2	22	1	1	1
adventurous holidays	2	1	8	4	1	2	1	5	2	0	19
abundant natural surroundings	3	6	13	16	6	5	5	23	4	3	16
sustainable tourism	2	12	10	8	3	3	0	8	2	1	11
adrenaline holidays	2	12	15	14	24	2	1	19	3	2	9
unique experiences	3	1	4	2	5	2	4	2	3	4	20
diverse sports activities	2	5	9	5	20	3	4	18	3	0	7
unique accommodation	3	3	1	3	0	1	5	6	1	1	6
takes care of the natural environment	3	14	6	10	13	1	4	27	4	3	4
tourists prepared to pay more	3	5	5	8	2	3	6	9	4	4	4
offer for demanding tourists	6	6	9	21	7	5	11	20	7	5	12
romantic holidays for couples	6	22	3	38	10	4	7	11	6	5	12
rich gastronomic offer	6	27	8	26	10	5	8	17	2	5	12
in trend	5	17	2	25	4	5	6	1	5	4	10
for urban tourists	6	13	17	29	1	1	13	18	1	6	14
rich culture and art	7	32	3	37	1	6	14	21	3	6	12

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.

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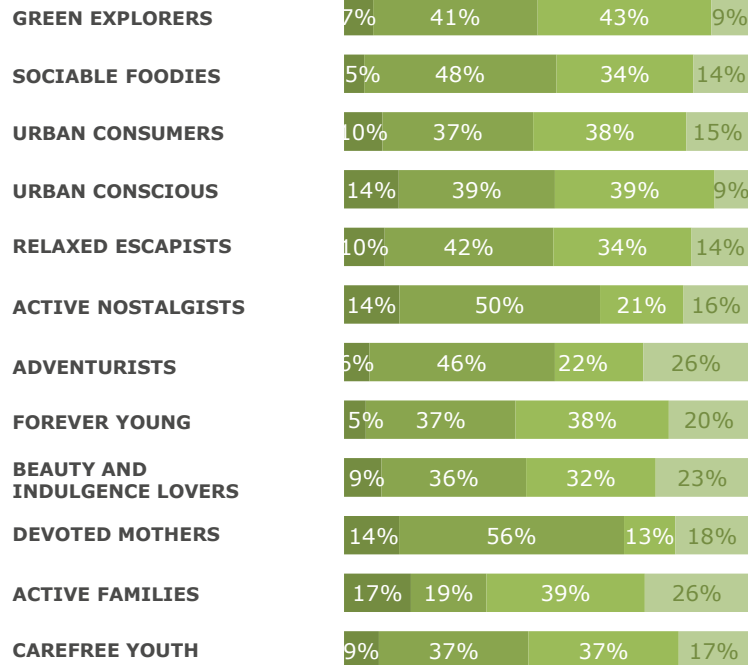# SLOVENIA: KNOWLEDGE, EXPERIENCE AND RECOMMENDATIONS

RUSSIA: Knowledge of, and experience with, Slovenia

I FEEL SLOVENIA

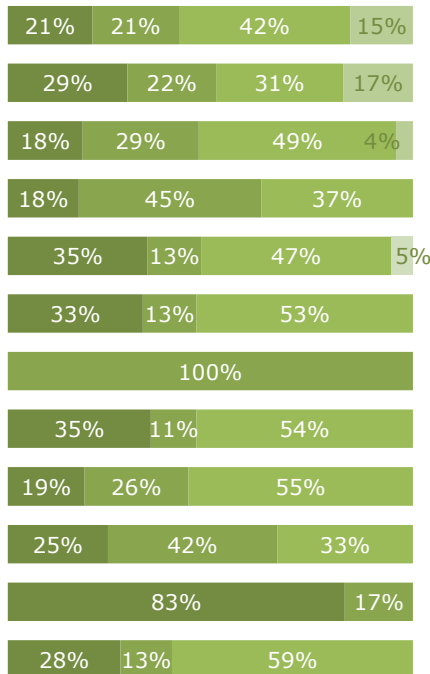STO — SLOVENSKA TURISTIČNA ORGANIZACIJA

	KNOWLEDGE OF SLOVENIA (Basis: sample)				SATISFACTION (Basis: visitors to Slovenia)				NPS – DEGREE OF RECOMMENDATION			NPS Index
GREEN EXPLORERS	7%	41%	43%	9%	21%	21%	42%	15%	23%	39%	38%	**14**
SOCIABLE FOODIES	5%	48%	34%	14%	29%	22%	31%	17%	39%	26%	35%	**-5**
URBAN CONSUMERS	10%	37%	38%	15%	18%	29%	49%	4%	14%	50%	36%	**23**
URBAN CONSCIOUS	14%	39%	39%	9%	18%	45%	37%		27%	22%	51%	**24**
RELAXED ESCAPISTS	10%	42%	34%	14%	35%	13%	47%	5%	35%	9%	56%	**21**
ACTIVE NOSTALGISTS	14%	50%	21%	16%	33%	13%	53%			64%	36%	**36**
ADVENTURISTS	6%	46%	22%	26%		100%				100%		**100**
FOREVER YOUNG	5%	37%	38%	20%	35%	11%	54%		5%	54%	41%	**36**
BEAUTY AND INDULGENCE LOVERS	9%	36%	32%	23%	19%	26%	55%		16%	31%	53%	**37**
DEVOTED MOTHERS	14%	56%	13%	18%	25%	42%	33%			33%	67%	**67**
ACTIVE FAMILIES	17%	19%	39%	26%		83%	17%		17%	83%		**66**
CAREFREE YOUTH	9%	37%	37%	17%	28%	13%	59%		40%	47%	13%	**-27**

Knowledge:
- know it and have visited it
- know it, but haven't visited it
- have heard about it, but do not know much
- don't know it

Meeting of expectations:
- highly above
- somewhat above
- meets
- somewhat below
- doesn't meet

Recommendations:
- gossipers
- neutral
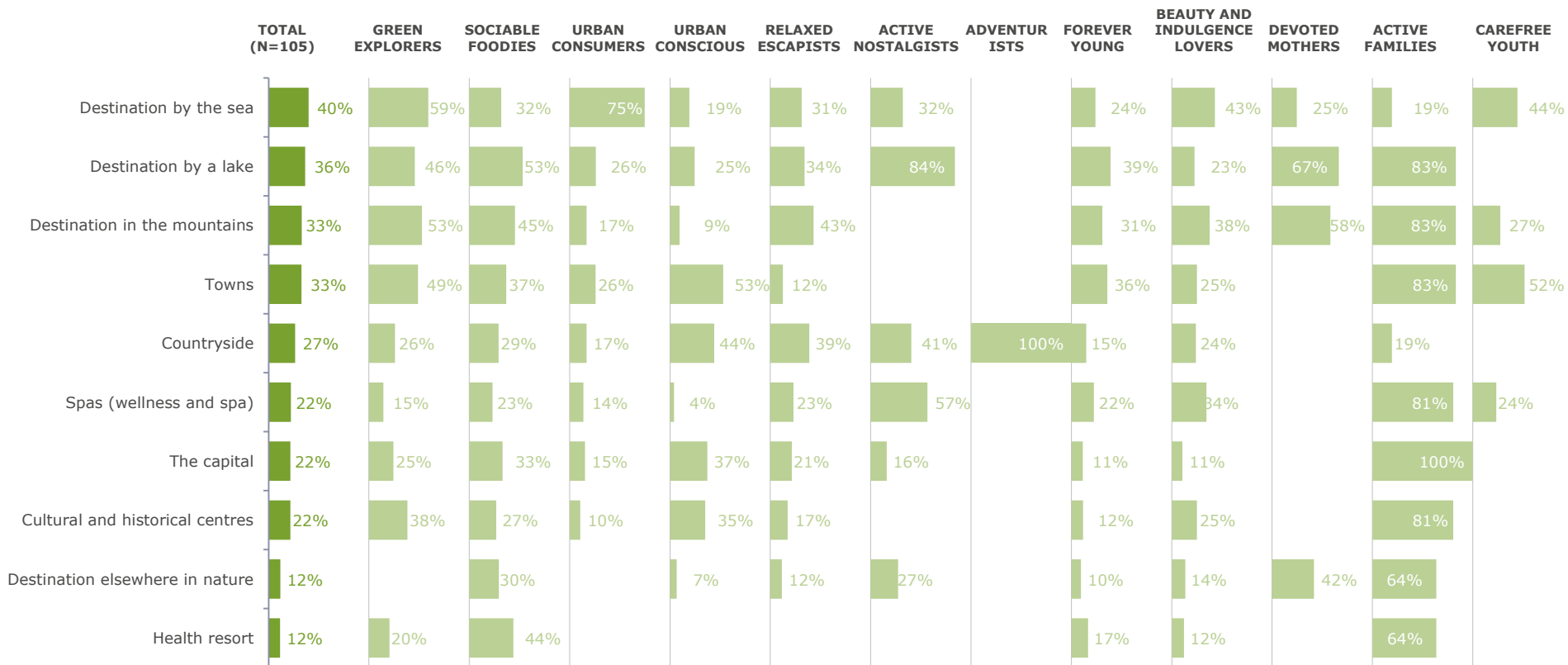- promoters

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.

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	TOTAL (N=105)	GREEN EXPLORERS	SOCIABLE FOODIES	URBAN CONSUMERS	URBAN CONSCIOUS	RELAXED ESCAPISTS	ACTIVE NOSTALGISTS	ADVENTURISTS	FOREVER YOUNG	BEAUTY AND INDULGENCE LOVERS	DEVOTED MOTHERS	ACTIVE FAMILIES	CAREFREE YOUTH
Destination by the sea	40%	59%	32%	75%	19%	31%	32%		24%	43%	25%	19%	44%
Destination by a lake	36%	46%	53%	26%	25%	34%	84%		39%	23%	67%	83%	
Destination in the mountains	33%	53%	45%	17%	9%	43%			31%	38%	58%	83%	27%
Towns	33%	49%	37%	26%		53%	12%		36%	25%		83%	52%
Countryside	27%	26%	29%	17%	44%	39%	41%	100%	15%	24%		19%	
Spas (wellness and spa)	22%	15%	23%	14%	4%	23%	57%		22%	34%		81%	24%
The capital	22%	25%	33%	15%	37%	21%	16%		11%	11%		100%	
Cultural and historical centres	22%	38%	27%	10%	35%	17%			12%	25%		81%	
Destination elsewhere in nature	12%		30%		7%	12%	27%		10%	14%	42%	64%	
Health resort	12%	20%	44%						17%	12%		64%	

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.

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Opportunities for improvement – Top 12

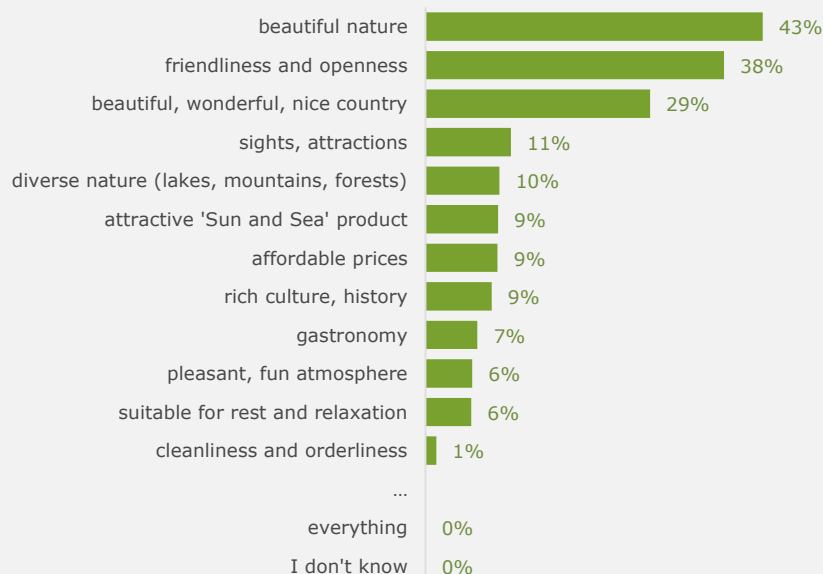*Gossipers and neutral (would <u>not</u> recommend Slovenia), n=72*

better services, tourist offer	21%
lower prices	15%
higher quality hotels, accommodation	8%
better friendliness and openness to tourists	6%
modernisation	6%
gastronomy	4%
more things happen, fun	4%
more advertising	4%
ensure better atmosphere, likeability	3%
better transport infrastructure, connections	3%
I'm not familiar enough	3%
more hotel capacities, accommodation	3%
…	
nothing, I'm satisfied	7%
I don't know	12%

Elements of excitement – Top 12

Promoters (would recommend Slovenia), n=58

beautiful nature	43%
friendliness and openness	38%
beautiful, wonderful, nice country	29%
sights, attractions	11%
diverse nature (lakes, mountains, forests)	10%
attractive 'Sun and Sea' product	9%
affordable prices	9%
rich culture, history	9%
gastronomy	7%
pleasant, fun atmosphere	6%
suitable for rest and relaxation	6%
cleanliness and orderliness	1%
…	
everything	0%
I don't know	0%

NOTES: OTHER STATEMENTS: knowledge of foreign languages, more attractions, sights, better cleanliness and orderliness, preservation of safety, different social and political attitude, more sports activities

NOTES: OTHER STATEMENTS: good and high-quality service

RUSSIA: Reasons for not visiting
Subsample: non-visitors

	TOTAL (N=1195)	GREEN EXPLORERS	SOCIABLE FOODIES	URBAN CONSUMERS	URBAN CONSCIOUS	RELAXED ESCAPISTS	ACTIVE NOSTALGISTS	ADVENTURISTS	FOREVER YOUNG	BEAUTY AND INDULGENCE LOVERS	DEVOTED MOTHERS	ACTIVE FAMILIES	CAREFREE YOUTH
I don't know the offer	41%	43%	37%	47%	37%	31%	32%	55%	42%	47%	49%	38%	33%
No reason	40%	47%	45%	39%	53%	34%	37%	22%	35%	32%	29%	49%	33%
No one has recommended	30%	32%	37%	27%	31%	27%	37%	26%	29%	27%	10%	24%	17%
No direct flight connections	8%	6%	9%	7%	4%	11%	4%	11%	9%	7%	6%		12%
Not the best value for money	8%	8%	10%	7%	5%	6%	14%	12%	7%	5%	5%	6%	6%
Uninteresting offer	7%	8%	4%	8%	3%	5%	17%	11%	8%	4%	10%	18%	13%
Complicated travelling around SLO without one's own means of transport	5%	5%	4%	3%	4%	4%	19%	18%	6%	3%			4%
Difficult to access transport-wise	4%	3%	4%	2%	6%	8%	8%	6%	4%	1%	11%		8%
No good accommodation options	4%	4%	3%	2%	4%	3%	8%		5%	1%	5%	6%	5%
Other	2%	3%	2%	3%	4%	1%		4%	1%	4%		6%	

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.

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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

| 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 |

RUSSIA: Green explorers (14.8%)

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

Cultural	74%	+24

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

TYPE OF ACCOMMODATION

Apartme	65%	+28

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	7%	+1

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

TRANSPORT AT THE DESTINATION

On foot	35%	+11

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

ACTIVITIES

Natural sights, nature	84%	+20
Sightseeing old town ce	81%	+16

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

MOTIVATION

Price of the destination	63%	+8
Articles o Internet	51%	+11

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

SOURCE OF INFORMATION

Articles on the Internet	74%	+5
Web porta (TripAdv	41%	+6

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

RESERVATION METHOD

Booking.com	57%	+17
Airbnb	20%	+7
Directly a accomm	15%	+3

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

TRAVELLING WITH

As a couple	42%	+10
Friends	14%	+1
Family	31%	-10
Relative	3%	+0

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

CHARACTERISTICS:

Size*	3,957,665		Summer	65%
Share*	4%		Autumn	21%
Age	41		Shorter trips	1
Women	54%		Longer trips	2

RUSSIA: General travel habits and motives

CHARACTERISTICS OF THE TARGET GROUP:

Size	26,711,0	
Proportion	27%	**64%**
Age	41	**21%**
Women	54%	1
	Longer trips	1

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 14%
Alone 3%

DESTINATION TYPE:

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

Cult. and hist. centres 8% 41% 50%

2x

Frequency of travelling abroad irrespective of the length

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.

ACTIVITIES – TOP 10:

and sea 81%

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

capital 59%
History and castles 58%
Museums, galleries, art 48%
Shopping 41%
Aquafun, amusement parks 37%
Live like a local 34%

TRAVEL MOTIVES:

something new 25% 54%

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)

Enjoy good food, drinks 2% 27%
Rest, slow down the pace of life 10% 27%
Experience diversity 6% 26%
Spend time with family, strengthen bonds 4% 16%
Take care of oneself, be restored 4% 16%
Spend time with partner 4% 15%

VISITING COUNTRIES:

Tu 36% 57%

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)

Czechia 20% 30%
Italy 22% 28%
Cyprus 17% 28%
Ukraine 6% 27%
Germany 17% 26%
Slovenia 2%

■ 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).

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RUSSIA: 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   **TRAIN**   **COACH**

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☐ To the destination

☐ At the destination **(24% ON FOOT, 4% BICYCLE, 2% MOTORCYCLE)**

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?

PRICE SENSITIVITY:

Accommodati...	84%	1%
Additional		
Food	10%	79%	11%
Shopping	25%	67%	8%

■ Most favourable price ■ Value for money ■ Price is irrelevant

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

PURCHASE JOURNEY:

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)

MOTIVATION
Past
Recommendations — 51%
Articles - the Internet — 40%
Visits are possible in all seasons — 26%

SOURCES OF
Web forums — 42%
Web portals — 35%
Opinions in social media — 32%

RESERVATION METHOD:
Airbnb — 13
Accommodation providers — 12
Official tourist info. centre — 6

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. / 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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