



# IDENTIFICATION OF MARKET POTENTIAL

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

THE NETHERLANDS

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**

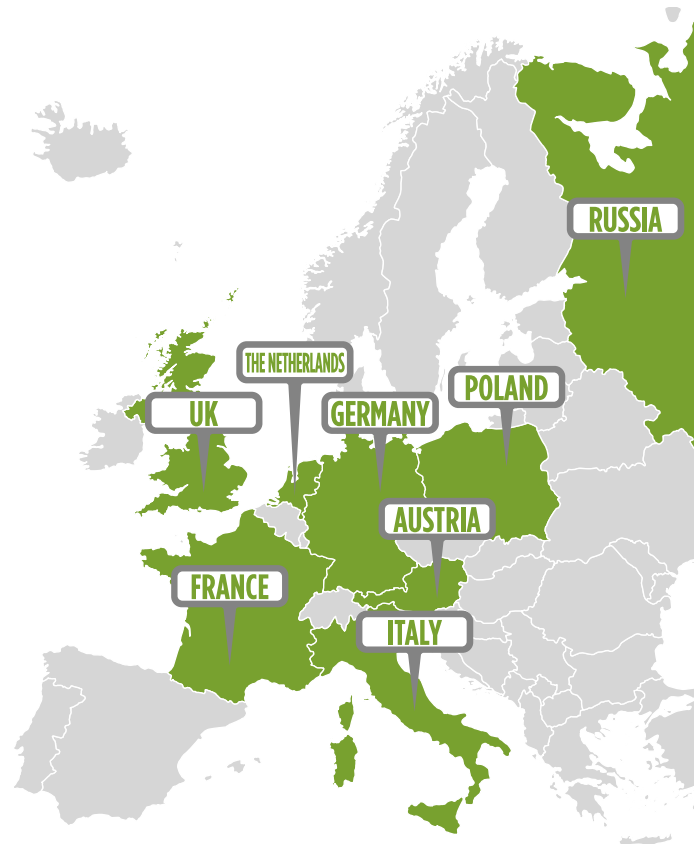
Global provider of web panels:

**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



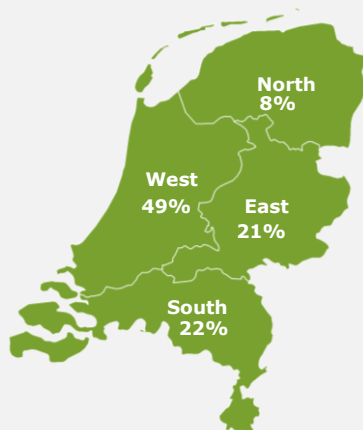
<b>Method of implementation</b>	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
<b>Country of implementation</b>	Netherlands
<b>Implementation period</b>	30 November – 05 December 2017
<b>Target group</b>	Citizens of 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=2,472</p> <p>Target group: n=1,575</p> <p>Visitors to Slovenia: n=285</p> <p>Tourists in Slovenia: n=95</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=18:42.



# THE NETHERLANDS: Sample demographics



## REGIONS:



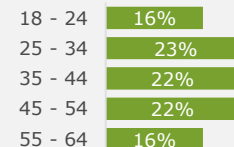
### DETAILED DEFINITION OF REGIONS:

**North:** Drenthe, Friesland, Groningen. **West:** Flevoland, North and South Holland, Utrecht. **East:** Gelderland, Overijssel. **South:** Limburg, North Brabant, Zeeland.

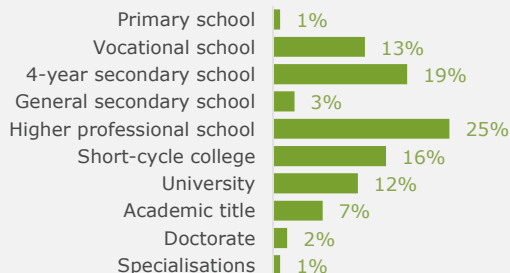
## GENDER:



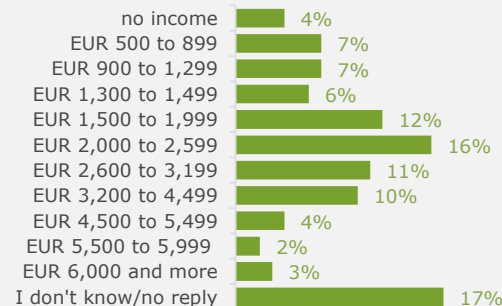
## AGE:



## EDUCATION:



## PERSONAL INCOME:



# Sample shares and sizes



*Bordered ellipses show the basis for share calculations.*



Basis: THE NETHERLANDS 18-65-year-olds	
POPULATION (18-65 YEARS)	100.0%
TARGET GROUP	64.3%
VISITORS TO SLOVENIA	11.5%
TOURISTS IN SLOVENIA	3.8%

Basis: TARGET GROUP	
POPULATION (18-65 YEARS)	/
TARGET GROUP	100.0%
VISITORS TO SLOVENIA	18.0%
TOURISTS IN SLOVENIA	6.0%

Absolute size*	
	10,477,231
	6,736,400
	1,205,857
	403,165

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

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



# THE NETHERLANDS: Size of the potential



Top choice

0,3%

**NARROW  
POTENTIAL**  
Top choice +  
repeated visit

4%

**BROAD  
POTENTIAL**  
Choice

7%

Visit or choice

9%

**NET  
HER  
LAN  
DS**

n=1533

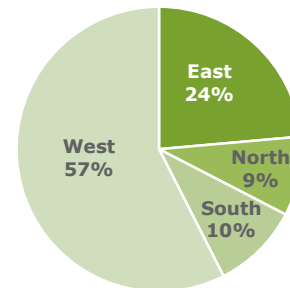
## NARROW POTENTIAL:

4%

*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>236,649</b>
East	55,832
North	21,281
South	23,501
West	136,035

## REGIONAL CLASSIFICATION:



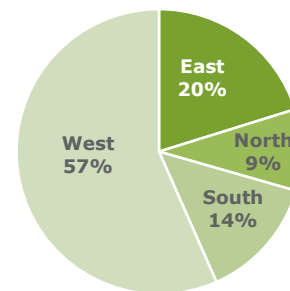
## BROAD POTENTIAL:

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>446,813</b>
East	90,275
North	41,249
South	62,356
West	252,934

## 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.

## THE NETHERLANDS: Size of segments by region

**GREEN EXPLORERS:**

22.4%

1,510,132

**URBAN CONSUMERS:**

15.9%

1,073,834

**FOREVER YOUNG:**

15.9%

1,068,282

		Total	East	North	South	West
	%	100.0%	20.8%	8.4%	21.9%	48.9%
	Size	6,736,400	1,400,304	564,424	1,474,883	3,296,789
GREEN EXPLORERS	%	22.4%	22.1%	9.5%	20.0%	48.4%
	Size	1,510,132	333,990	142,791	302,761	730,591
SOCIABLE FOODIES	%	5.3%	21.4%	7.6%	15.1%	55.9%
	Size	353,732	75,660	26,964	53,396	197,713
URBAN CONSUMERS	%	15.9%	19.4%	5.2%	26.5%	48.9%
	Size	1,073,834	208,676	55,494	284,206	525,458
URBAN CONSCIOUS	%	3.2%	26.9%	11.4%	25.1%	36.6%
	Size	213,415	57,388	24,395	53,613	78,018
RELAXED ESCAPISTS	%	5.7%	22.0%	7.5%	17.5%	53.1%
	Size	386,772	84,986	28,956	67,562	205,268
ACTIVE NOSTALGISTS	%	7.3%	13.0%	11.6%	21.1%	54.3%
	Size	489,514	63,433	56,886	103,490	265,705
ADVENTURISTS	%	4.5%	21.8%	6.3%	13.9%	58.0%
	Size	305,276	66,458	19,287	42,349	177,181
FOREVER YOUNG	%	15.9%	19.8%	10.6%	25.3%	44.3%
	Size	1,068,282	211,857	113,062	269,752	473,612
BEAUTY AND INDULGENCE LOVERS	%	11.3%	14.8%	6.5%	26.0%	52.7%
	Size	758,242	112,536	49,424	197,056	399,226
DEVOTED MOTHERS	%	2.5%	33.7%	3.7%	22.4%	40.2%
	Size	169,948	57,271	6,342	37,994	68,340
ACTIVE FAMILIES	%	3.7%	36.4%	9.5%	20.8%	33.3%
	Size	248,036	90,319	23,576	51,652	82,489
CAREFREE YOUTH	%	2.4%	24.1%	10.5%	5.3%	60.1%
	Size	159,217	38,444	16,711	8,392	95,670

**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	59%
Cities	46%
Elsewhere in nature	41%
In the mountains	38%
Cultural and historical centres	36%

TYPE OF  
ACCOMMODATION

Hotel	77%
Apartment	50%
Camp	25%
Staying with relatives or friends	18%
Private accommodation (e.g. Airbnb)	16%

TRANSPORT TO THE  
DESTINATION

Aeroplane	55%
Car	37%
Motorhome (camper)	2%
Train	2%
Coach	2%

TRANSPORT AT THE  
DESTINATION

Car	76%
Coach	25%
Train	19%
On foot	14%
Bicycle	5%

## ACTIVITIES

Sightseeing of old town centres	61%
Sightseeing of a town, the capital	60%
Sun and sea	57%
Natural sights, nature	50%
Recreation	49%

## MOTIVATION

Past experience	43%
Price of the destination	40%
Recommendations from friends	35%
Proximity of the destination	28%
Articles on the Internet	23%

SOURCE OF  
INFORMATION

Articles on the Internet	51%
Web portals (TripAdvisor etc.)	28%
Agencies	23%
Travel literature	21%
Opinions in social media	17%

## RESERVATION METHOD

Booking.com	39%
Agency	30%
Directly at the accommodation provider	30%
Expedia.com	14%
Airbnb	12%

## TRAVELLING WITH

As a couple	39%
Family	32%
Friends	14%
Alone	8%
Relatives	7%

## CHARACTERISTICS:

Size*	<b>6,736,400</b>
Share*	<b>64%</b>
Age	<b>40</b>
Women	<b>47%</b>

Spring	<b>16%</b>
Summer	<b>68%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## THE NETHERLANDS: Tourists in Slovenia (6.0%)



## DESTINATION TYPE

Elsewhere in nature	51%	+10
In the mountains	46%	+8
Cultural and historical centres	43%	+7
By the sea	54%	-5
Capitals	36%	+3

## TYPE OF ACCOMMODATION

<u>Private accommodation (e.g. Airbnb)</u>	<u>32%</u>	<u>+16</u>
Apartment	58%	+9
<u>Hostel</u>	<u>27%</u>	<u>+12</u>
Camp	29%	+4
Hotel	78%	+0

## TRANSPORT TO THE DESTINATION

Car	45%	+8
Train	4%	+2
Coach	4%	+2
Aeroplane	43%	-12
Motorhome (camper)	2%	+0

## TRANSPORT AT THE DESTINATION

Car	79%	+3
Train	25%	+6
Coach	22%	-3
Motorhome (camper)	3%	+0
On foot	10%	-4

## ACTIVITIES

<u>Sightseeing of old town centres</u>	<u>83%</u>	<u>+22</u>
<u>Natural sights, nature</u>	<u>67%</u>	<u>+17</u>
<u>Seeing major tourist attractions</u>	<u>60%</u>	<u>+18</u>
<u>Touring</u>	<u>48%</u>	<u>+14</u>
<u>History and castles</u>	<u>57%</u>	<u>+13</u>

## MOTIVATION

<u>Proximity of the destination</u>	<u>39%</u>	<u>+12</u>
Price of the destination	47%	+7
Past experience	49%	+6
<u>Articles on the Internet</u>	<u>32%</u>	<u>+9</u>
Recommendations from friends	39%	+5

## SOURCE OF INFORMATION

Articles on the Internet	61%	+10
Web portals (TripAdvisor etc.)	35%	+7
Travel literature	27%	+6
<u>Other</u>	<u>16%</u>	<u>+8</u>
Blogs	17%	+3

## RESERVATION METHOD

<u>Booking.com</u>	<u>60%</u>	<u>+22</u>
<u>Airbnb</u>	<u>22%</u>	<u>+10</u>
Own accommodation	11%	+3
Directly at the accommodation provider	31%	+1
Other web portal	9%	+2

## TRAVELLING WITH

As a couple	46%	+7
Friends	15%	+1
Alone	10%	+2
Family	24%	-8
Relatives	5%	-2

## CHARACTERISTICS:

Size*	403,165
Share*	4%
Age	39
Women	60%

Spring	17%
Summer	66%
Shorter trips	2
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.

## THE NETHERLANDS: Green explorers (22.4%)



## DESTINATION TYPE

Cultural and historical centres	65%	+29
In the mountains	62%	+24
By the sea	78%	+19
Capitals	53%	+20
Cities	64%	+18

## TYPE OF ACCOMMODATION

Apartment	72%	+22
Camp	29%	+4
Private accommodation (e.g. Airbnb)	22%	+5
Hotel	77%	-1
Staying with relatives or friends	19%	+1

## TRANSPORT TO THE DESTINATION

Car	41%	+4
Aeroplane	53%	-2
Motorhome (camper)	2%	+0
Train	2%	+0
Coach	1%	-1

## TRANSPORT AT THE DESTINATION

Car	78%	+2
Coach	28%	+3
On foot	17%	+3
Train	20%	+1
Bicycle	6%	+1

## ACTIVITIES

Sightseeing of old town centres	83%	+23
Sightseeing of a town, the capital	78%	+18
Natural sights, nature	71%	+21
Sports activities	54%	+21
History and castles	53%	+9

## MOTIVATION

Past experience	49%	+6
Recommendations from friends	43%	+8
Proximity of the destination	36%	+8
Articles on the Internet	29%	+6
Price of the destination	45%	+5

## SOURCE OF INFORMATION

Articles on the Internet	59%	+8
Web portals (TripAdvisor etc.)	34%	+6
Travel literature	27%	+6
Web forums	16%	+0
Blogs	14%	+0

## RESERVATION METHOD

Booking.com	45%	+6
Directly at the accommodation provider	38%	+8
Airbnb	19%	+7
Expedia.com	15%	+2
Organiser	9%	+2

## TRAVELLING WITH

As a couple	44%	+5
Family	31%	-1
Alone	8%	+1
Friends	11%	-3
Relatives	6%	-2

## CHARACTERISTICS:

Size*	1,510,132
Share*	14%
Age	41
Women	56%

Spring	20%
Summer	66%
Shorter trips	2
Longer trips	1

# THE NETHERLANDS: Urban consumers (15.9%)



## DESTINATION TYPE

<u>Cities</u>	<b>79%</b>	<b>+33</b>
By the sea	59%	+0
<u>Capitals</u>	<b>40%</b>	<b>+7</b>
Cultural and historical centres	29%	-7
Spas (wellness and spa)	4%	-1

## TYPE OF ACCOMMODATION

<u>Hotel</u>	<b>92%</b>	<b>+15</b>
Staying with relatives or friends	17%	-1
Apartment	47%	-3
Private accommodation (e.g. Airbnb)	15%	-2
Own property (holiday cottage)	11%	-1

## TRANSPORT TO THE DESTINATION

<u>Aeroplane</u>	<b>73%</b>	<b>+18</b>
Train	1%	-1
<u>Ship or another vessel</u>	<b>1%</b>	<b>+0</b>
<u>Bicycle</u>	<b>0%</b>	<b>+0</b>
Car	23%	-15

## TRANSPORT AT THE DESTINATION

<u>Train</u>	<b>25%</b>	<b>+7</b>
<u>Coach</u>	<b>30%</b>	<b>+5</b>
Car	71%	-4
<u>On foot</u>	<b>19%</b>	<b>+5</b>
Bicycle	3%	-2

## ACTIVITIES

Shopping	67%	+25
<u>Sightseeing of a town, the capital</u>	<b>72%</b>	<b>+11</b>
<u>Nightlife (bars, clubs)</u>	<b>37%</b>	<b>+23</b>
Sun and sea	61%	+4
Recreation	54%	+5

## MOTIVATION

<u>Price of the destination</u>	<b>45%</b>	<b>+5</b>
<u>Popularity of the destination</u>	<b>27%</b>	<b>+6</b>
<u>Articles on the Internet</u>	<b>26%</b>	<b>+4</b>
Past experience	43%	+0
Recommendations from friends	35%	+1

## SOURCE OF INFORMATION

<u>Agencies</u>	<b>28%</b>	<b>+5</b>
Web portals (TripAdvisor etc.)	30%	+2
Articles on the Internet	53%	+2
Blogs	16%	+2
Web forums	18%	+1

## RESERVATION METHOD

<u>Agency</u>	<b>33%</b>	<b>+3</b>
Booking.com	41%	+2
<u>Airbnb</u>	<b>14%</b>	<b>+2</b>
Expedia.com	14%	+1
Other web portal	6%	-1

## TRAVELLING WITH

As a couple	39%	+0
<u>Friends</u>	<b>21%</b>	<b>+7</b>
Alone	9%	+1
Family	25%	-7
Relatives	6%	-2

## CHARACTERISTICS:

Size*	<b>1,073,834</b>
Share*	<b>10%</b>
Age	<b>38</b>
Women	<b>45%</b>

Spring	<b>14%</b>
Summer	<b>70%</b>
Shorter trips	<b>2</b>
Longer trips	<b>1</b>

## THE NETHERLANDS: Forever young (15.9%)



## DESTINATION TYPE

Cultural and historical centres	32%	-4
By the sea	46%	-13
Capitals	22%	-11
Elsewhere in nature	25%	-16
Health resorts	1%	+0

## TYPE OF ACCOMMODATION

<u>Hotel</u>	<b>83%</b>	<b>+6</b>
Camp	23%	-2
Staying with relatives or friends	17%	-1
Glamping	5%	+1
Hostel	14%	-2

## TRANSPORT TO THE DESTINATION

Car	39%	+2
Aeroplane	56%	+0
Coach	2%	+0
<u>Bicycle</u>	<b>0%</b>	<b>+0</b>
Ship or another vessel	1%	+0

## TRANSPORT AT THE DESTINATION

Car	76%	+0
Coach	24%	-1
Train	16%	-3
Motorcycle	3%	+0
Bicycle	4%	-1

## ACTIVITIES

<u>Sightseeing of old town centres</u>	<b>81%</b>	<b>+20</b>
<u>History and castles</u>	<b>65%</b>	<b>+21</b>
<u>Sightseeing of a town, the capital</u>	<b>70%</b>	<b>+9</b>
<u>Seeing major tourist attractions</u>	<b>56%</b>	<b>+14</b>
<u>Touring</u>	<b>52%</b>	<b>+18</b>

## MOTIVATION

Price of the destination	40%	+0
<u>Travel literature</u>	<b>19%</b>	<b>+2</b>
Proximity of the destination	26%	-2
Suitability of the destination in all seasons	14%	+0
Travel presentations	6%	+1

## SOURCE OF INFORMATION

<u>Agencies</u>	<b>28%</b>	<b>+6</b>
Articles on the Internet	49%	-2
Travel literature	22%	+1
Other	9%	+1
Web portals (TripAdvisor etc.)	24%	-4

## RESERVATION METHOD

<u>Agency</u>	<b>34%</b>	<b>+4</b>
Organiser	11%	+3
Booking.com	34%	-4
Expedia.com	12%	-2
Other	4%	-1

## TRAVELLING WITH

As a couple	38%	-1
Friends	15%	+1
<u>Relatives</u>	<b>10%</b>	<b>+2</b>
Family	30%	-2
Alone	7%	-1

## CHARACTERISTICS:

Size*	<b>1,068,282</b>
Share*	<b>10%</b>
Age	<b>43</b>
Women	<b>43%</b>

Spring	<b>15%</b>
Summer	<b>68%</b>
Shorter trips	<b>2</b>
Longer trips	<b>1</b>

# THE NETHERLANDS: Beauty and indulgence lovers

## (11.3%)



### DESTINATION TYPE

By the sea	<b>89%</b>	<b>+30</b>
Cities	33%	-13
By a lake	27%	-3
Elsewhere in nature	28%	-13
<u>Spas (wellness and spa)</u>	<u>15%</u>	<u>+10</u>

### TYPE OF ACCOMMODATION

Hotel	<b>86%</b>	<b>+9</b>
Own property (holiday cottage)	14%	+1
Apartment	45%	-5
Camp	24%	-1
Other	5%	+1

### TRANSPORT TO THE DESTINATION

<u>Aeroplane</u>	<b>65%</b>	<b>+9</b>
Coach	2%	+0
Ship or another vessel	1%	+0
Train	1%	-1
Car	31%	-6

### TRANSPORT AT THE DESTINATION

Car	76%	+0
Coach	26%	+1
<u>On foot</u>	<u>19%</u>	<u>+5</u>
Bicycle	2%	-3
Motorhome (camper)	2%	-1

### ACTIVITIES

Sun and sea	<b>92%</b>	<b>+36</b>
Recreation	<b>75%</b>	<b>+26</b>
Shopping	<b>74%</b>	<b>+31</b>
Aquafun, amusement parks	<b>40%</b>	<b>+19</b>
Activities and fun for children	<b>27%</b>	<b>+16</b>

### MOTIVATION

Price of the destination	<b>50%</b>	<b>+10</b>
Popularity of the destination	<b>31%</b>	<b>+10</b>
Past experience	43%	+0
Proximity of the destination	29%	+1
Recommendations from friends	33%	-2

### SOURCE OF INFORMATION

Agencies	<b>33%</b>	<b>+10</b>
Articles on the Internet	54%	+3
Web forums	19%	+3
Web portals (TripAdvisor etc.)	30%	+2
Opinions in social media	18%	+2

### RESERVATION METHOD

Agency	<b>41%</b>	<b>+12</b>
<u>Other web portal</u>	<u>13%</u>	<u>+6</u>
Directly at the accommodation provider	28%	-1
At the activity provider	7%	+0
Booking.com	31%	-8

### TRAVELLING WITH

Family	<b>57%</b>	<b>+25</b>
Friends	9%	-6
Relatives	6%	-1
As a couple	26%	-13
Alone	2%	-5

## CHARACTERISTICS:

Size*	<b>758,242</b>
Share*	<b>7%</b>
Age	<b>42</b>
Women	<b>56%</b>

Spring	<b>17%</b>
Summer	<b>73%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## THE NETHERLANDS: Active nostalgists (7.3%)



## DESTINATION TYPE

<u>Elsewhere in nature</u>	<b>72%</b>	<b>+30</b>
<u>In the mountains</u>	<b>67%</b>	<b>+29</b>
<u>By a lake</u>	<b>41%</b>	<b>+11</b>
<u>Countryside</u>	<b>30%</b>	<b>+9</b>
By the sea	35%	-24

TYPE OF  
ACCOMMODATION

<u>Boutique hotel</u>	<b>21%</b>	<b>+14</b>
Hotel	78%	+0
Camp	24%	-2
Own property (holiday cottage)	14%	+1
<u>Camper</u>	<b>6%</b>	<b>+4</b>

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	<b>51%</b>	<b>+13</b>
<u>Motorcycle</u>	<b>4%</b>	<b>+3</b>
<u>Coach</u>	<b>4%</b>	<b>+2</b>
Aeroplane	40%	-15
Motorhome (camper)	1%	-1

TRANSPORT AT THE  
DESTINATION

<u>Car</u>	<b>83%</b>	<b>+7</b>
<u>Motorhome (camper)</u>	<b>8%</b>	<b>+5</b>
On foot	10%	-4
Coach	13%	-12
Train	9%	-9

## ACTIVITIES

<u>Sports activities</u>	<b>61%</b>	<b>+28</b>
Natural sights, nature	50%	+0
<u>Gastronomy</u>	<b>22%</b>	<b>+3</b>
<u>Visit to a wine cellar</u>	<b>14%</b>	<b>+5</b>
Winter sports	18%	+3

## MOTIVATION

<u>Past experience</u>	<b>50%</b>	<b>+7</b>
<u>Suitability of the destination in all seasons</u>	<b>18%</b>	<b>+4</b>
Proximity of the destination	24%	-4
Travel literature	16%	-1
Other	8%	+3

SOURCE OF  
INFORMATION

Web portals (TripAdvisor etc.)	27%	-1
Travel literature	20%	-1
Other	15%	+7
Web forums	15%	-1
Articles on the Internet	38%	-13

## RESERVATION METHOD

<u>Directly at the accommodation provider</u>	<b>39%</b>	<b>+9</b>
At the activity provider	12%	+4
Other web portal	8%	+1
<u>Agoda.com</u>	<b>6%</b>	<b>+2</b>
Booking.com	33%	-6

## TRAVELLING WITH

<u>As a couple</u>	<b>63%</b>	<b>+24</b>
Relatives	7%	-1
Family	15%	-16
Friends	9%	-6
Alone	7%	-1

## CHARACTERISTICS:

Size*	<b>489,514</b>
Share*	<b>5%</b>
Age	<b>43</b>
Women	<b>46%</b>

Spring	<b>14%</b>
Summer	<b>62%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## THE NETHERLANDS: Relaxed escapists (5.7%)



## DESTINATION TYPE

By a lake	22%	-9
Countryside	16%	-5
Elsewhere in nature	26%	-15
In the mountains	23%	-15
By the sea	31%	-28

TYPE OF  
ACCOMMODATION

Camp	26%	+1
Staying with relatives or friends	17%	-1
Tourist farm	6%	+1
Hotel	70%	-7
Hostel	12%	-3

TRANSPORT TO THE  
DESTINATION

<u>Motorhome</u> <u>(camper)</u>	<b>4%</b>	<b>+2</b>
<u>Coach</u>	<b>4%</b>	<b>+2</b>
Aeroplane	55%	-1
Train	3%	+1
Car	32%	-5

TRANSPORT AT THE  
DESTINATION

Coach	20%	-5
Bicycle	8%	+3
<u>Motorcycle</u>	<b>7%</b>	<b>+5</b>
Car	58%	-18
Train	11%	-7

## ACTIVITIES

Natural sights, nature	51%	+1
<u>Gastronomy</u>	<b>26%</b>	<b>+7</b>
<u>Selfness, digital- detox, etc.</u>	<b>21%</b>	<b>+17</b>
<u>Thermal health spas</u>	<b>15%</b>	<b>+9</b>
Water sports activities	15%	+3

## MOTIVATION

<u>Videos on the Internet</u>	<b>15%</b>	<b>+5</b>
Travel presentations	11%	+6
Recommendations from friends	27%	-7
Articles on the Internet	15%	-8
Travel literature	13%	-4

SOURCE OF  
INFORMATION

<u>Articles in print media</u>	<b>23%</b>	<b>+12</b>
<u>Travel presentations</u>	<b>14%</b>	<b>+7</b>
Articles on the Internet	33%	-18
Travel literature	17%	-5
Opinions in social media	14%	-3

## RESERVATION METHOD

Booking.com	34%	-5
<u>Agoda.com</u>	<b>7%</b>	<b>+3</b>
Through official TICs	6%	+3
Airbnb	10%	-2
Organiser	8%	+1

## TRAVELLING WITH

As a couple	40%	+1
<u>Friends</u>	<b>19%</b>	<b>+5</b>
Relatives	9%	+2
Family	26%	-6
Alone	7%	-1

## CHARACTERISTICS:

Size*	<b>386,772</b>
Share*	<b>4%</b>
Age	<b>36</b>
Women	<b>38%</b>

Spring	<b>15%</b>
Summer	<b>61%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>



## THE NETHERLANDS: Sociable foodies (5.3%)



## DESTINATION TYPE

Cities	84%	+38
Cultural and historical centres	76%	+40
Countryside	56%	+36
Capitals	63%	+30
By the sea	64%	+5

## TYPE OF ACCOMMODATION

Hotel	88%	+11
Boutique hotel	30%	+23
Staying with relatives or friends	25%	+7
Apartment	52%	+2
Private accommodation (e.g. Airbnb)	21%	+5

## TRANSPORT TO THE DESTINATION

Aeroplane	62%	+7
Motorcycle	3%	+2
Coach	3%	+1
Car	30%	-8
Motorhome (camper)	1%	-1

## TRANSPORT AT THE DESTINATION

Car	84%	+8
Train	38%	+19
Coach	29%	+4
On foot	15%	+1
Motorcycle	2%	-1

## ACTIVITIES

History and castles	88%	+44
Sightseeing of a town, the capital	89%	+28
Seeing major tourist attractions	77%	+36
Natural sights, nature	80%	+30
Sightseeing of old town centres	88%	+27

## MOTIVATION

TV programmes	37%	+15
Suitability of the destination in all seasons	27%	+13
Articles on the Internet	35%	+12
Popularity of the destination	33%	+12
Recommendations from friends	40%	+5

## SOURCE OF INFORMATION

Web portals (TripAdvisor etc.)	43%	+15
Articles on the Internet	63%	+11
Travel literature	32%	+11
Opinions in social media	20%	+4
Articles in print media	17%	+6

## RESERVATION METHOD

Booking.com	59%	+21
Directly at the accommodation provider	43%	+13
Expedia.com	25%	+12
Airbnb	18%	+6
Other web portal	13%	+6

## TRAVELLING WITH

As a couple	54%	+15
Family	34%	+3
Relatives	7%	-1
Friends	3%	-11
Alone	2%	-6

## CHARACTERISTICS:

Size*	353,732
Share*	3%
Age	41
Women	43%

Spring	21%
Summer	61%
Shorter trips	2
Longer trips	2

## THE NETHERLANDS: Adventurists (4.5%)



## DESTINATION TYPE

In the mountains	68%	+30
Elsewhere in nature	64%	+23
By a lake	57%	+27
Countryside	36%	+15
By the sea	31%	-28

TYPE OF  
ACCOMMODATION

Camp	47%	+22
Glamping	16%	+13
Hostel	23%	+7
Own property (holiday cottage)	19%	+7
<u>Tourist farm</u>	14%	+9

TRANSPORT TO THE  
DESTINATION

Car	66%	+29
<u>Motorhome</u> (camper)	10%	+8
Train	3%	+1
Aeroplane	17%	-38
Ship or another vessel	1%	+0

TRANSPORT AT THE  
DESTINATION

Car	75%	-1
Bicycle	10%	+5
<u>Motorcycle</u>	9%	+6
Train	16%	-3
Motorhome (camper)	5%	+2

## ACTIVITIES

History and castles	76%	+31
<u>Mountaineering</u> (more challenging tours)	35%	+28
<u>Natural sights,</u> nature	58%	+8
<u>Aquafun,</u> <u>amusement parks</u>	33%	+12
<u>Water sports</u> activities	27%	+15

## MOTIVATION

Past experience	47%	+4
<u>Articles in print</u> media	17%	+9
Posts on social media, blogs	18%	+3
Travel literature	20%	+3
Recommendations from friends	28%	-7

SOURCE OF  
INFORMATION

<u>Opinions in social</u> media	25%	+8
Articles on the Internet	51%	+0
Web forums	15%	-2
Articles in print media	14%	+3
Other	12%	+4

## RESERVATION METHOD

<u>Directly at the</u> <u>accommodation</u> provider	37%	+7
<u>Own accommodation</u>	14%	+6
<u>Agoda.com</u>	10%	+6
Airbnb	11%	-1
At the activity provider	9%	+2

## TRAVELLING WITH

Family	41%	+9
Friends	18%	+4
<u>Relatives</u>	11%	+4
As a couple	24%	-15
Alone	6%	-2

## CHARACTERISTICS:

Size*	305,276
Share*	3%
Age	36
Women	39%

Spring	7%
Summer	78%
Shorter trips	2
Longer trips	2

## THE NETHERLANDS: Active families (3.7%)



## DESTINATION TYPE

In the mountains	79%	<b>+41</b>
Elsewhere in nature	77%	<b>+36</b>
Countryside	35%	<b>+14</b>
By the sea	43%	-16
By a lake	30%	+0

TYPE OF  
ACCOMMODATION

Apartment	75%	<b>+25</b>
Camp	36%	<b>+11</b>
Private accommodation (e.g. Airbnb)	23%	<b>+6</b>
Own property (holiday cottage)	20%	+7
Hostel	17%	+2

TRANSPORT TO THE  
DESTINATION

Car	59%	<b>+21</b>
Coach	3%	+1
Aeroplane	39%	-17

TRANSPORT AT THE  
DESTINATION

Car	87%	<b>+11</b>
On foot	16%	+2
Motorhome (camper)	2%	-1
Coach	12%	-13
Train	9%	-9

## ACTIVITIES

Sports activities	65%	<b>+32</b>
Natural sights, nature	70%	<b>+20</b>
Touring	49%	<b>+15</b>
Mountaineering (more challenging tours)	31%	<b>+24</b>
Water sports activities	34%	<b>+22</b>

## MOTIVATION

Past experience	50%	<b>+7</b>
Recommendations from friends	39%	+4
Articles on the Internet	26%	+4
Articles in print media	13%	<b>+5</b>
Posts on social media, blogs	18%	+4

SOURCE OF  
INFORMATION

Web portals (TripAdvisor etc.)	35%	<b>+7</b>
Travel literature	24%	+3
Articles in print media	15%	+4
Articles on the Internet	49%	-2
Opinions in social media	16%	-1

## RESERVATION METHOD

Booking.com	43%	+4
Directly at the accommodation provider	34%	+5
Organiser	12%	+5
Agoda.com	8%	<b>+4</b>
Own accommodation	9%	+2

## TRAVELLING WITH

As a couple	42%	+3
Alone	10%	+2
Family	33%	+2
Friends	7%	-7
Relatives	7%	-1

## CHARACTERISTICS:

Size*	248,036
Share*	2%
Age	41
Women	45%

Spring	15%
Summer	74%
Shorter trips	2
Longer trips	1

## THE NETHERLANDS: Urban conscious (3.2%)



## DESTINATION TYPE

Cities	80%	+34
Capitals	68%	+34
Cultural and historical centres	52%	+16
In the mountains	24%	-14
Countryside	13%	-8

## TYPE OF ACCOMMODATION

Hostel	53%	+37
Private accommodation (e.g. Airbnb)	31%	+15
Staying with relatives or friends	27%	+9
Tourist farm	11%	+6
Hotel	58%	-20

## TRANSPORT TO THE DESTINATION

Train	12%	+10
Aeroplane	61%	+6
Ship or another vessel	2%	+2
Motorhome (camper)	4%	+2
Motorcycle	2%	+1

## TRANSPORT AT THE DESTINATION

Coach	39%	+15
Train	39%	+20
Car	59%	-16
Motorcycle	7%	+4
On foot	12%	-2

## ACTIVITIES

Learning about the local way of life	52%	+38
Museums, galleries and art	60%	+37
Social events, festivals	56%	+37
Music festivals and concerts	48%	+34
Sightseeing of old town centres	68%	+7

## MOTIVATION

Travel literature	37%	+20
Past experience	43%	+0
TV programmes	26%	+4
Videos on the Internet	19%	+9
Articles on the Internet	24%	+1

## SOURCE OF INFORMATION

Opinions in social media	29%	+12
Blogs	26%	+12
Travel literature	29%	+8
Articles on the Internet	52%	+0
Friends, family	9%	+6

## RESERVATION METHOD

Booking.com	56%	+18
Expedia.com	32%	+19
Airbnb	23%	+11
At the activity provider	16%	+9
Other	11%	+6

## TRAVELLING WITH

Friends	25%	+11
Alone	21%	+13
As a couple	27%	-12
Relatives	11%	+4
Family	17%	-15

## CHARACTERISTICS:

Size*	213,415
Share*	2%
Age	35
Women	32%

Spring	23%
Summer	61%
Shorter trips	3
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.

## THE NETHERLANDS: Devoted mothers (2.5%)



## DESTINATION TYPE

By a lake	54%	+23
Countryside	45%	+25
In the mountains	48%	+10
Elsewhere in nature	40%	-1
By the sea	31%	-28

TYPE OF  
ACCOMMODATION

Apartment	72%	+22
Tourist farm	19%	+14
Camp	33%	+7
Hostel	21%	+6
Other	9%	+5

TRANSPORT TO THE  
DESTINATION

Car	45%	+8
Motorcycle	9%	+8
Motorhome (camper)	4%	+2
Aeroplane	42%	-13

TRANSPORT AT THE  
DESTINATION

Motorhome (camper)	11%	+8
Car	74%	-2
Bicycle	11%	+6
Coach	15%	-9
Motorcycle	6%	+4

## ACTIVITIES

Sports activities	47%	+14
Countryside, farm activities	30%	+22
Activities and fun for children	29%	+18
Winter sports	28%	+12
Natural sights, nature	48%	-2

## MOTIVATION

TV programmes	29%	+6
Recommendations from friends	39%	+4
Videos on the Internet	22%	+12
TV ads	14%	+11
Price of the destination	41%	+1

SOURCE OF  
INFORMATION

Opinions in social media	33%	+16
Travel literature	27%	+6
Travel presentations	17%	+10
Web forums	22%	+5
Articles on the Internet	34%	-18

## RESERVATION METHOD

Agency	42%	+12
Agoda.com	13%	+9
Other	12%	+7
Airbnb	14%	+2
Booking.com	28%	-10

## TRAVELLING WITH

Family	49%	+17
Alone	15%	+8
As a couple	17%	-22
Friends	14%	+0
Relatives	5%	-3

## CHARACTERISTICS:

Size*	169,948
Share*	2%
Age	41
Women	29%

Spring	10%
Summer	70%
Shorter trips	2
Longer trips	2

## THE NETHERLANDS: Carefree youth (2.4%)



## DESTINATION TYPE

<u>By the sea</u>	<b>88%</b>	<b>+29</b>
<u>Cities</u>	<b>64%</b>	<b>+18</b>
Capitals	38%	+5
<u>Countryside</u>	<b>28%</b>	<b>+7</b>
In the mountains	25%	-13

TYPE OF  
ACCOMMODATION

Apartment	56%	+6
<u>Hostel</u>	<b>36%</b>	<b>+21</b>
<u>Camp</u>	<b>37%</b>	<b>+11</b>
Staying with relatives or friends	33%	+15
Private accommodation (e.g. Airbnb)	20%	+3

TRANSPORT TO THE  
DESTINATION

<u>Train</u>	<b>6%</b>	<b>+4</b>
Aeroplane	53%	-2
Motorhome (camper)	3%	+1
<u>Motorcycle</u>	<b>3%</b>	<b>+2</b>
Car	33%	-5

TRANSPORT AT THE  
DESTINATION

<u>Train</u>	<b>29%</b>	<b>+10</b>
Coach	29%	+4
Bicycle	10%	+5
Car	60%	-16
On foot	13%	-1

## ACTIVITIES

<u>Music festivals and concerts</u>	<b>55%</b>	<b>+41</b>
<u>Nightlife (bars, clubs)</u>	<b>55%</b>	<b>+41</b>
<u>Social events, festivals</u>	<b>43%</b>	<b>+24</b>
<u>Sun and sea</u>	<b>66%</b>	<b>+10</b>
<u>Aquafun, amusement parks</u>	<b>33%</b>	<b>+12</b>

## MOTIVATION

<u>Recommendations from friends</u>	<b>58%</b>	<b>+23</b>
Popularity of the destination	26%	+5
<u>Videos on the Internet</u>	<b>19%</b>	<b>+9</b>
Past experience	34%	-9
Articles on the Internet	20%	-2

SOURCE OF  
INFORMATION

<u>Opinions in social media</u>	<b>24%</b>	<b>+8</b>
Agencies	24%	+1
Travel literature	23%	+2
Blogs	20%	+6
Articles on the Internet	32%	-20

## RESERVATION METHOD

<u>Own accommodation</u>	<b>33%</b>	<b>+25</b>
Expedia.com	17%	+3
Organiser	12%	+5
Other	9%	+4
Agency	21%	-9

## TRAVELLING WITH

<u>Friends</u>	<b>35%</b>	<b>+21</b>
Family	18%	-14
<u>Alone</u>	<b>16%</b>	<b>+8</b>
<u>Relatives</u>	<b>16%</b>	<b>+8</b>
As a couple	15%	-24

## CHARACTERISTICS:

Size*	<b>159,217</b>
Share*	<b>2%</b>
Age	<b>31</b>
Women	<b>40%</b>

Spring	<b>11%</b>
Summer	<b>86%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

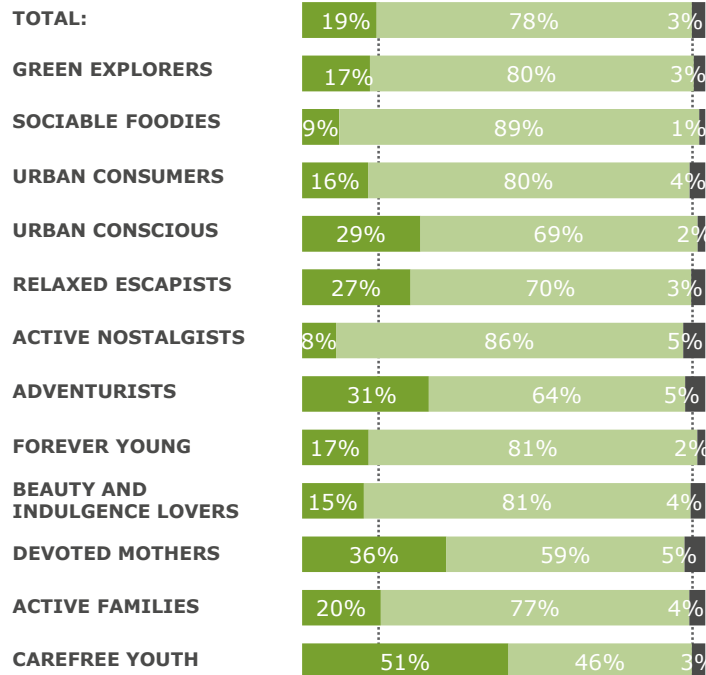
## NOTES:

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.

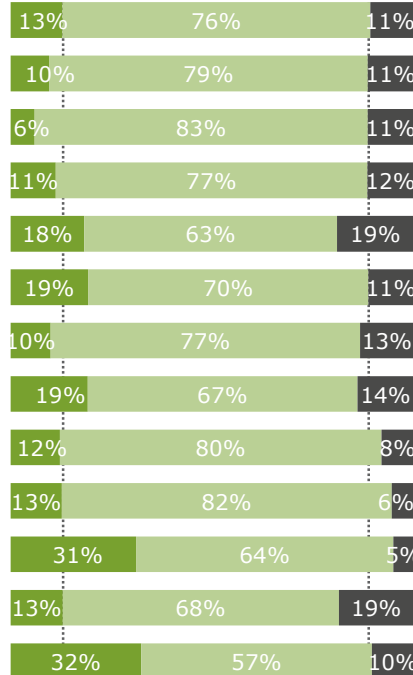
# THE NETHERLANDS: Price sensitivity



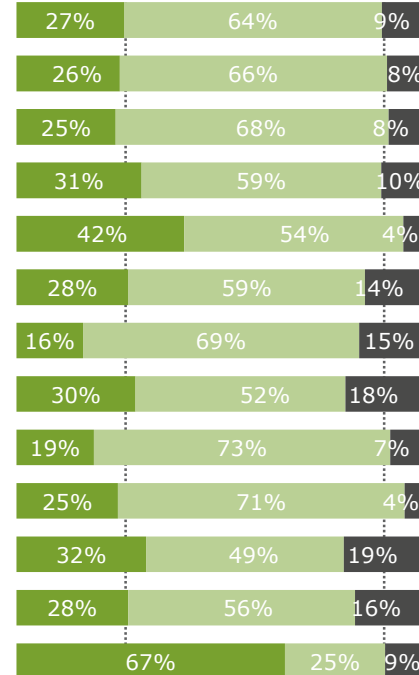
## CHOICE OF ACCOMMODATION



## CHOICE OF DESTINATION



## CHOICE OF TRANSPORT

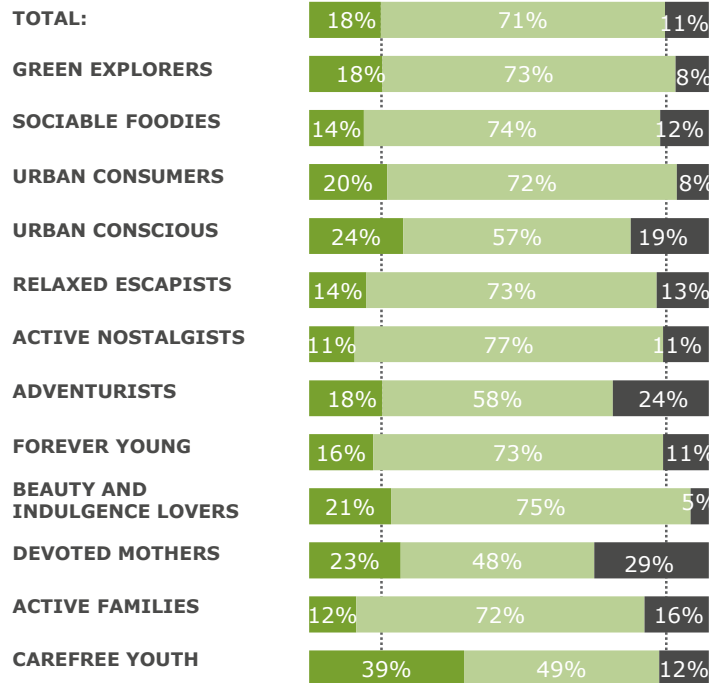


seek the most favourable offer
  assess value for money
  disregard the price

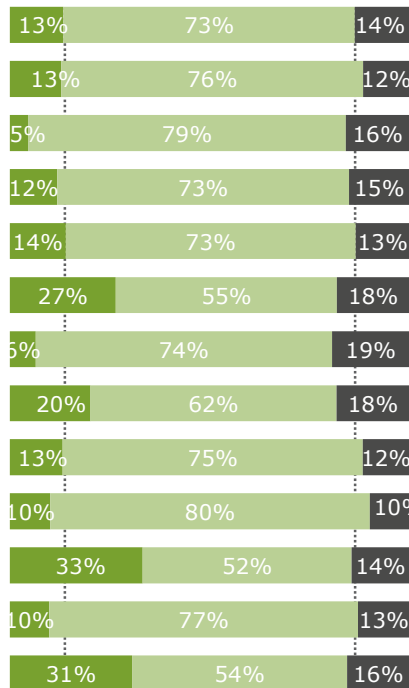
# THE NETHERLANDS: Price sensitivity



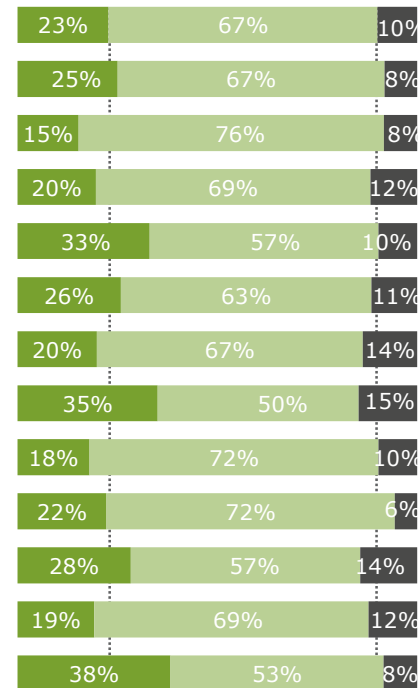
## CHOICE OF ADDITIONAL ACTIVITIES



## CHOICE OF FOOD



## SHOPPING



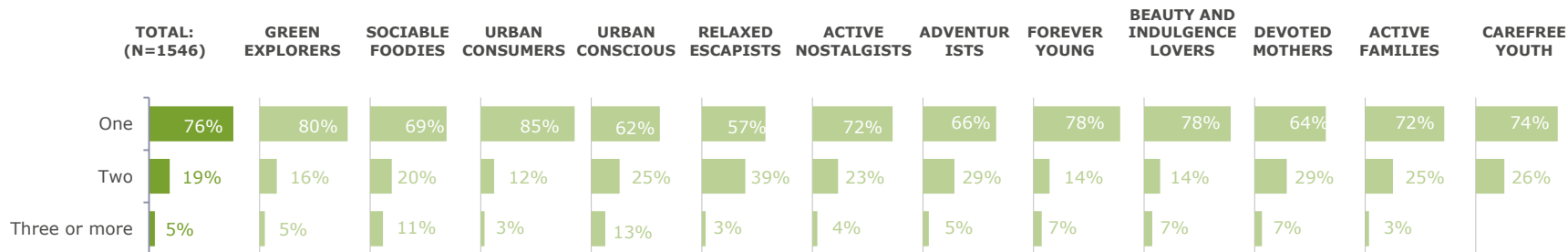
seek the most favourable offer
  assess value for money
  disregard the price



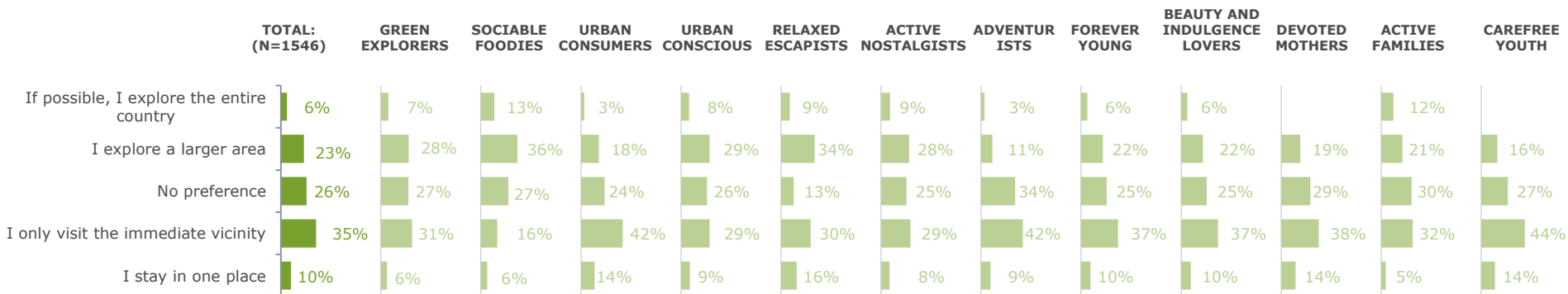
# THE NETHERLANDS: Level of exploration



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



## Exploring in one country



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



## CHARACTERISTICS OF THE TARGET GROUP:

Size	<b>6,736,400</b>	Spring	<b>16%</b>
Proportion	<b>64.3%</b>	Summer	<b>68%</b>
Age	<b>40</b>	Shorter trips	<b>2</b>
Women	<b>47%</b>	Longer trips	<b>2</b>

## TRAVELLING WITH:

As a couple	<b>39%</b>
Family	<b>32%</b>
Friends	<b>14%</b>
Alone	<b>8%</b>
Relatives	<b>7%</b>

## DESTINATION TYPE:

By the sea	<b>33%</b>	<b>26%</b>	<b>59%</b>
Towns	<b>13%</b>	<b>34%</b>	<b>46%</b>
Elsewhere in nature	<b>12%</b>	<b>30%</b>	<b>41%</b>

**4x**

a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of old town centres	<b>61%</b>
Sightseeing of a town, the capital	<b>60%</b>
Sun and sea	<b>57%</b>
Nature parks, attractions	<b>50%</b>
Recreation	<b>49%</b>
History and castles	<b>44%</b>
Shopping	<b>43%</b>
Tourist attractions	<b>42%</b>
Touring	<b>34%</b>
Sports activities	<b>33%</b>

## TRAVEL MOTIVES – TOP 10:

Relaxation	<b>25%</b>	<b>54%</b>
Visit a beautiful destination	<b>9%</b>	<b>34%</b>
To learn something new	<b>11%</b>	<b>32%</b>
Retreat from everyday life	<b>9%</b>	<b>30%</b>
Spend time with partner	<b>7%</b>	<b>27%</b>
Experience another culture	<b>6%</b>	<b>25%</b>
Rest, slow down the pace of life	<b>6%</b>	<b>22%</b>
Enjoy good food, drinks	<b>2%</b>	<b>21%</b>
Visit a town, the capital	<b>6%</b>	<b>21%</b>
Spend time with family, strengthening bonds	<b>6%</b>	<b>19%</b>

## VISITING COUNTRIES – TOP 10:

Germany	<b>46%</b>	<b>67%</b>
France	<b>45%</b>	<b>64%</b>
Spain	<b>48%</b>	<b>61%</b>
Belgium	<b>35%</b>	<b>56%</b>
Italy	<b>41%</b>	<b>50%</b>
United Kingdom	<b>32%</b>	<b>46%</b>
Austria	<b>29%</b>	<b>43%</b>
Greece	<b>29%</b>	<b>40%</b>
Non-European countries	<b>21%</b>	<b>34%</b>
Turkey	<b>13%</b>	<b>31%</b>
Slovenia	<b>3%</b>	<b>6%</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).

# THE NETHERLANDS: Elements of the purchase journey and consumption



## TYPE OF ACCOMMODATION:



Other frequent accommodation types:

**Relatives, friends: 18%**

**Private accommodation: 16%**

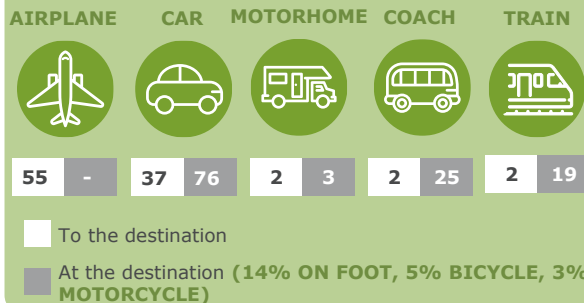
**Hostel: 15%**

## RESERVATION

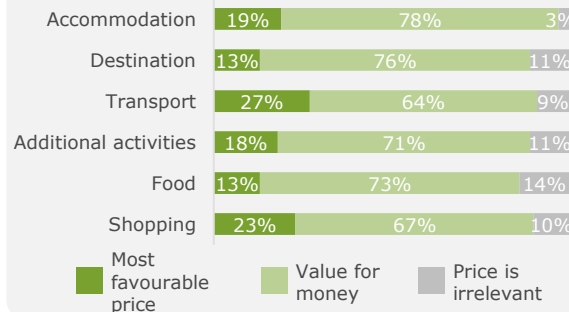
**UP  
TO 3  
months in  
advance**

**74%**

## TRANSPORT MODE (%):

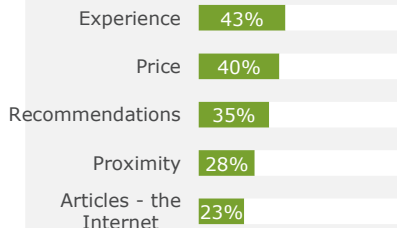


## PRICE SENSITIVITY:

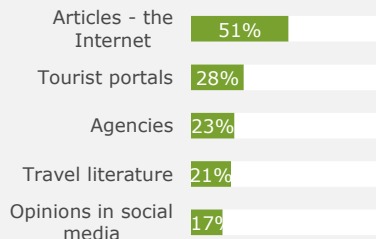


## PURCHASE JOURNEY:

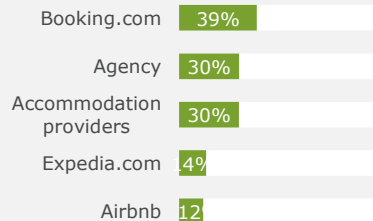
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
<b>ACCOMMODATION, FOOD and other per person/day</b>	<b>€59</b>	<b>€60</b>
<b>TRANSPORT per person</b>	<b>€120</b>	<b>€126</b>

## 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	1,205,857	Spring	13%
Proportion	11.5%	Summer	71%
Age	40	Shorter trips	3
Women	43%	Longer trips	2

## TRAVELLING WITH:

As a couple	42%
Family	29%
Friends	17%
Alone	8%
Relatives	4%

## DESTINATION TYPE:

By the sea	27%	25%	52%
In the mountains	16%	33%	49%
Towns	12%	33%	45%

5x  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of old town centres	66%
Sightseeing of a town, the capital	59%
Nature parks, attractions	56%
Sun and sea	51%
History and castles	49%
Recreation	48%
Tourist attractions	41%
Sports activities	39%
Touring	35%
Shopping	34%

## TRAVEL MOTIVES – TOP 10:

Visit a beautiful destination	12%	41%
Relaxation	17%	41%
To learn something new	11%	33%
Experience another culture	7%	31%
Retreat from everyday life	8%	30%
Spend time with partner	7%	24%
Enjoy good food, drinks	3%	21%
Rest, slow down the pace of life	5%	19%
Visit a town	6%	18%
Spend time with family, strengthen bonds	5%	17%

## VISITING COUNTRIES – TOP 10:

Germany	52%	71%
France	44%	64%
Belgium	40%	60%
Italy	46%	57%
Spain	44%	56%
Austria	37%	50%
United Kingdom	32%	49%
Greece	31%	42%
Luxembourg	22%	39%
Croatia	26%	36%
Slovenia	19%	33%

■ 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).

# THE NETHERLANDS: Elements of the purchase journey and consumption

*Subsample: visitors to Slovenia*



## TYPE OF ACCOMMODATION:



Other frequent accommodation types:

**Hostel: 24%**

**Private accommodation: 22%**

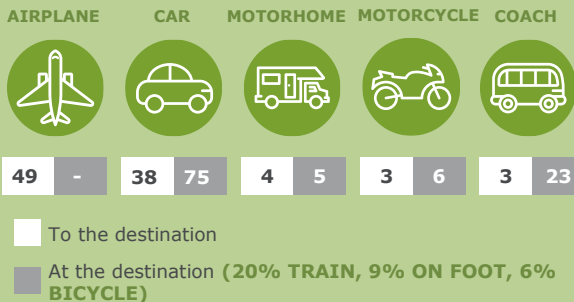
**Relatives, friends: 21%**

## RESERVATION

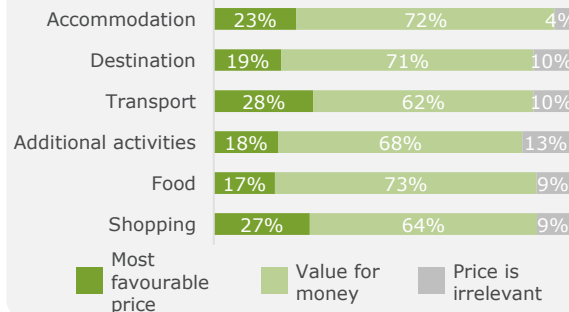
**UP  
TO 3  
months in  
advance**

**76%**

## TRANSPORT MODE (%):

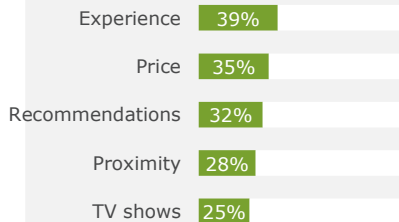


## PRICE SENSITIVITY:

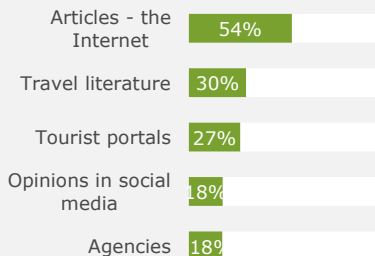


## PURCHASE JOURNEY:

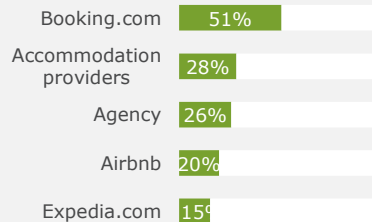
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€52	€53
TRANSPORT per person	€123	€130

## 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	<b>403,165</b>	Spring	<b>17%</b>
Proportion	<b>3.8%</b>	Summer	<b>66%</b>
Age	<b>39</b>	Shorter trips	<b>2</b>
Women	<b>60%</b>	Longer trips	<b>2</b>

## TRAVELLING WITH:

As a couple	<b>46%</b>
Family	<b>24%</b>
Friends	<b>15%</b>
Alone	<b>10%</b>
Relatives	<b>5%</b>

## DESTINATION TYPE:

By the sea	<b>23%</b>	<b>31%</b>	<b>54%</b>
Elsewhere in nature	<b>15%</b>	<b>36%</b>	<b>51%</b>
In the mountains	<b>15%</b>	<b>31%</b>	<b>46%</b>

**4x**

a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of old town centres	<b>83%</b>
Sightseeing of a town, the capital	<b>69%</b>
Nature parks, attractions	<b>67%</b>
Sun and sea	<b>61%</b>
Tourist attractions	<b>60%</b>
History and castles	<b>57%</b>
Recreation	<b>51%</b>
Touring	<b>48%</b>
Sports activities	<b>46%</b>
Shopping	<b>38%</b>

## TRAVEL MOTIVES – TOP 10:

Visit a beautiful destination	<b>16%</b>	<b>52%</b>
To learn something new	<b>13%</b>	<b>41%</b>
Relaxation	<b>18%</b>	<b>39%</b>
Retreat from everyday life	<b>12%</b>	<b>38%</b>
Experience another culture	<b>8%</b>	<b>31%</b>
Spend time with partner	<b>7%</b>	<b>26%</b>
Enjoy good food, drinks	<b>0%</b>	<b>25%</b>
Visit a town, the capital	<b>4%</b>	<b>18%</b>
Spend time with friends	<b>5%</b>	<b>17%</b>
Spend time with family, strengthen bonds	<b>4%</b>	<b>17%</b>

## VISITING COUNTRIES – TOP 10:

Slovenia	<b>56%</b>	<b>100%</b>
Germany	<b>69%</b>	<b>90%</b>
France	<b>58%</b>	<b>81%</b>
Italy	<b>66%</b>	<b>80%</b>
Belgium	<b>58%</b>	<b>77%</b>
Spain	<b>61%</b>	<b>73%</b>
United Kingdom	<b>49%</b>	<b>72%</b>
Austria	<b>52%</b>	<b>66%</b>
Croatia	<b>50%</b>	<b>62%</b>
Czechia	<b>37%</b>	<b>59%</b>

Repeated visit  
Visit

## NOTES:

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

# THE NETHERLANDS: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia



## TYPE OF ACCOMMODATION:



Other frequent accommodation types:

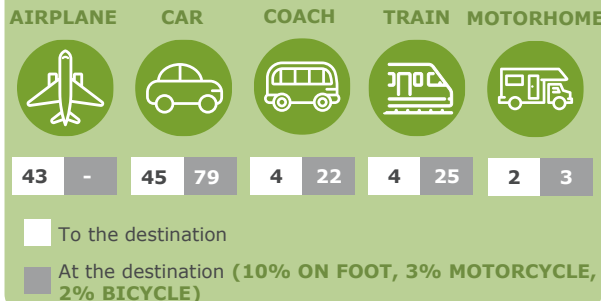
**Camp: 29%**  
**Hostel: 27%**  
**Relatives, friends: 22%**

## RESERVATION

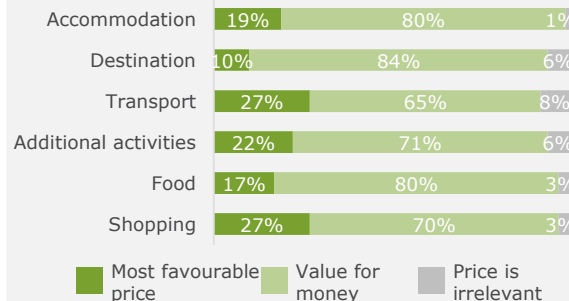
**UP  
TO 3  
months in  
advance**

**78%**

## TRANSPORT MODE (%):

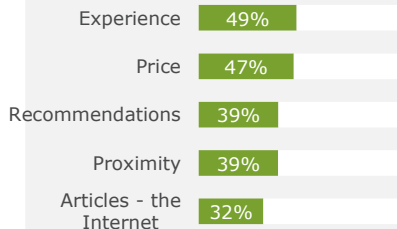


## PRICE SENSITIVITY:

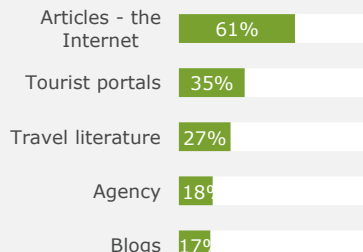


## PURCHASE JOURNEY:

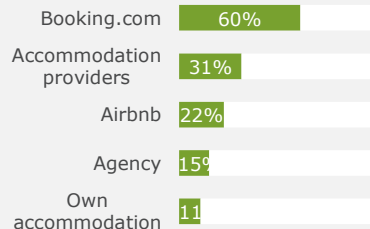
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	€56	€58
	in SLO	€38	€39
TRANSPORT per person	in Europe	€126	€131
	in SLO	€89	€90

## 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.

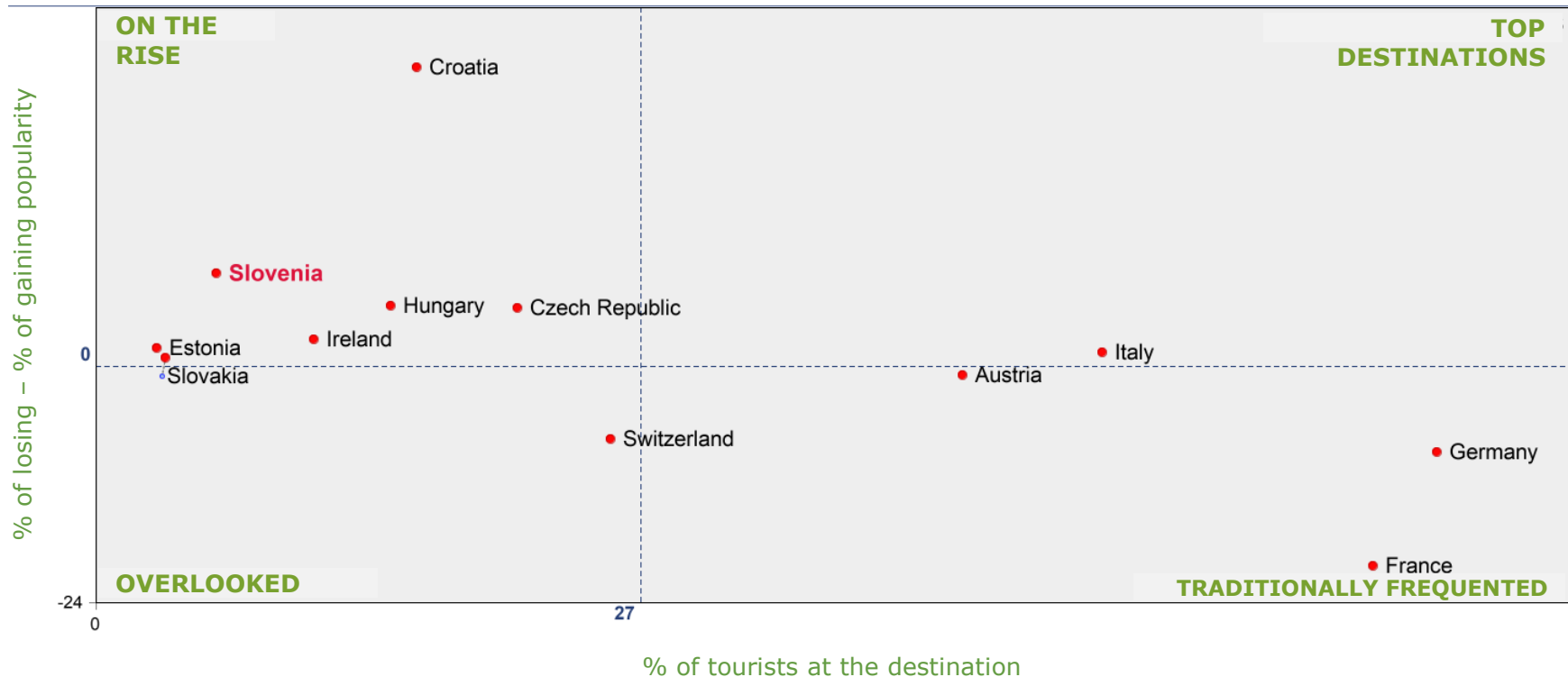


# **IMAGE AND PERCEPTION OF SLOVENIA**



# THE NETHERLANDS: Destination relevance

Share of visitors by popularity of the destination



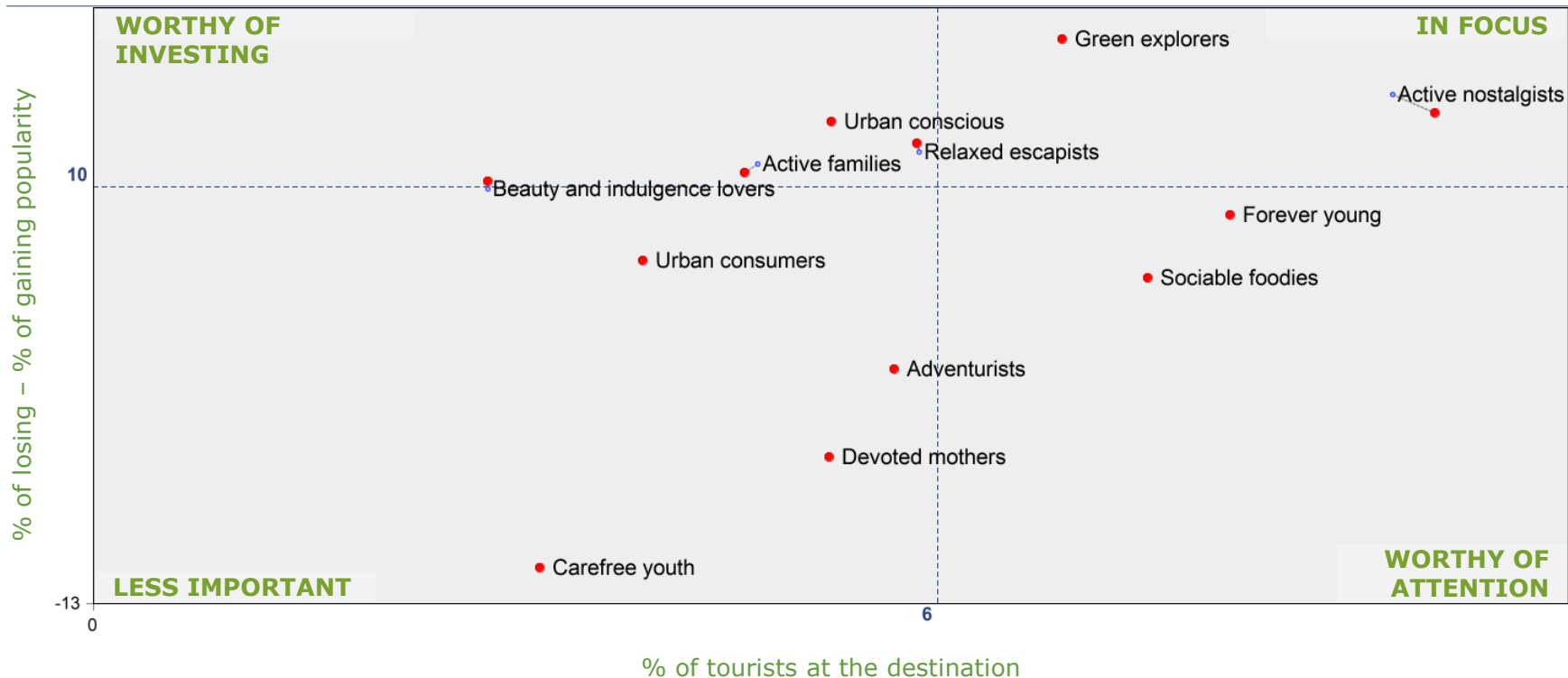
## NOTES:

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).

# THE NETHERLANDS: Slovenia's relevance

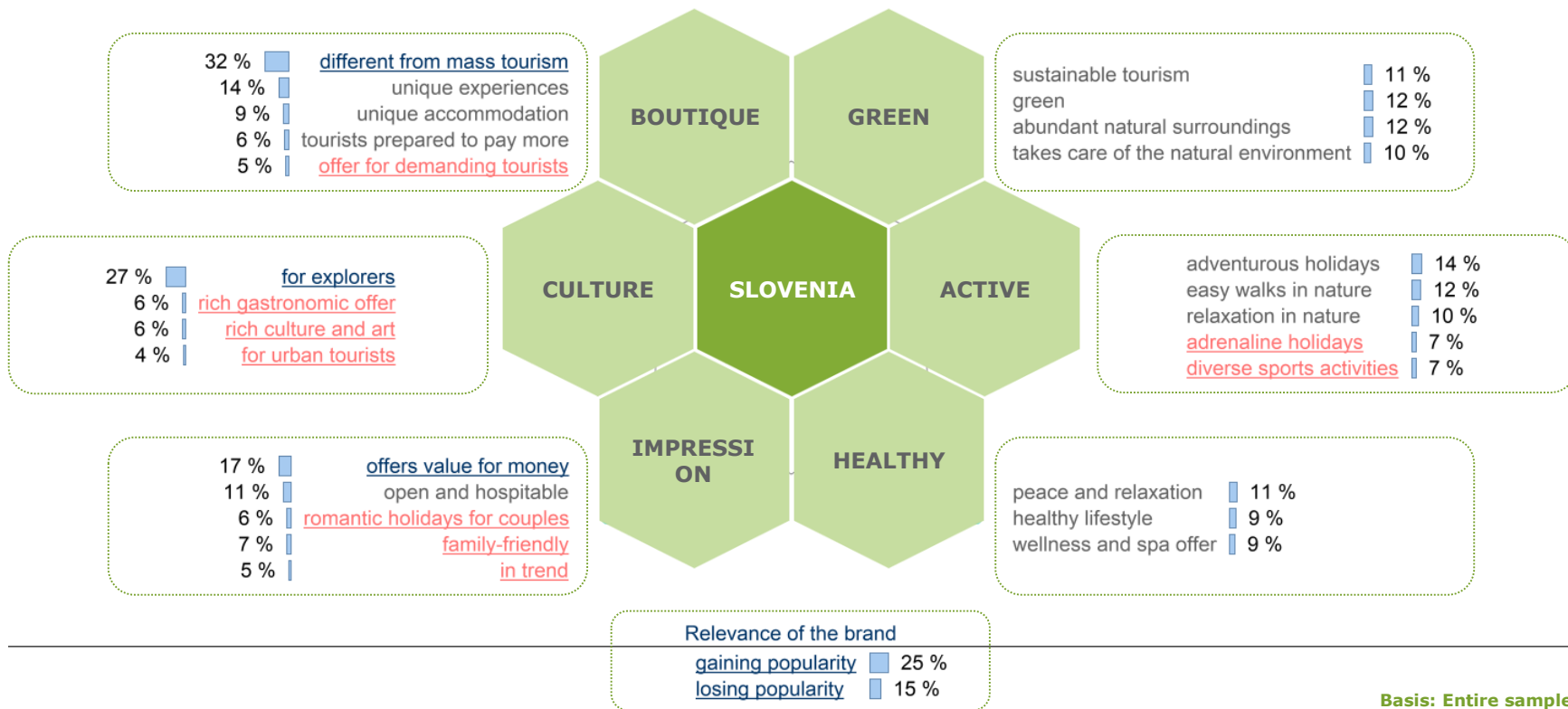
Slovenia's relevance as a tourist destination according to the popularity by segments of tourists



**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).

# THE NETHERLANDS: Slovenia's image



**Basis: Entire sample**

**NOTES:**

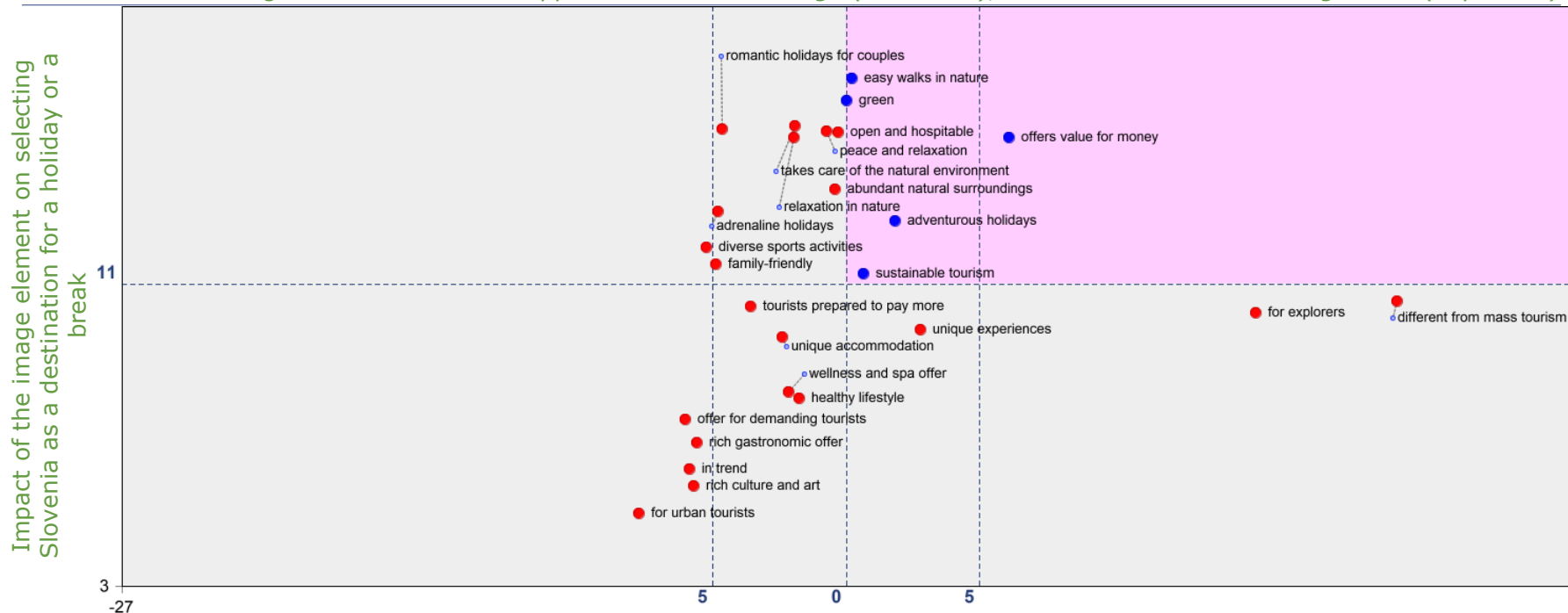
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

# THE NETHERLANDS: 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)*

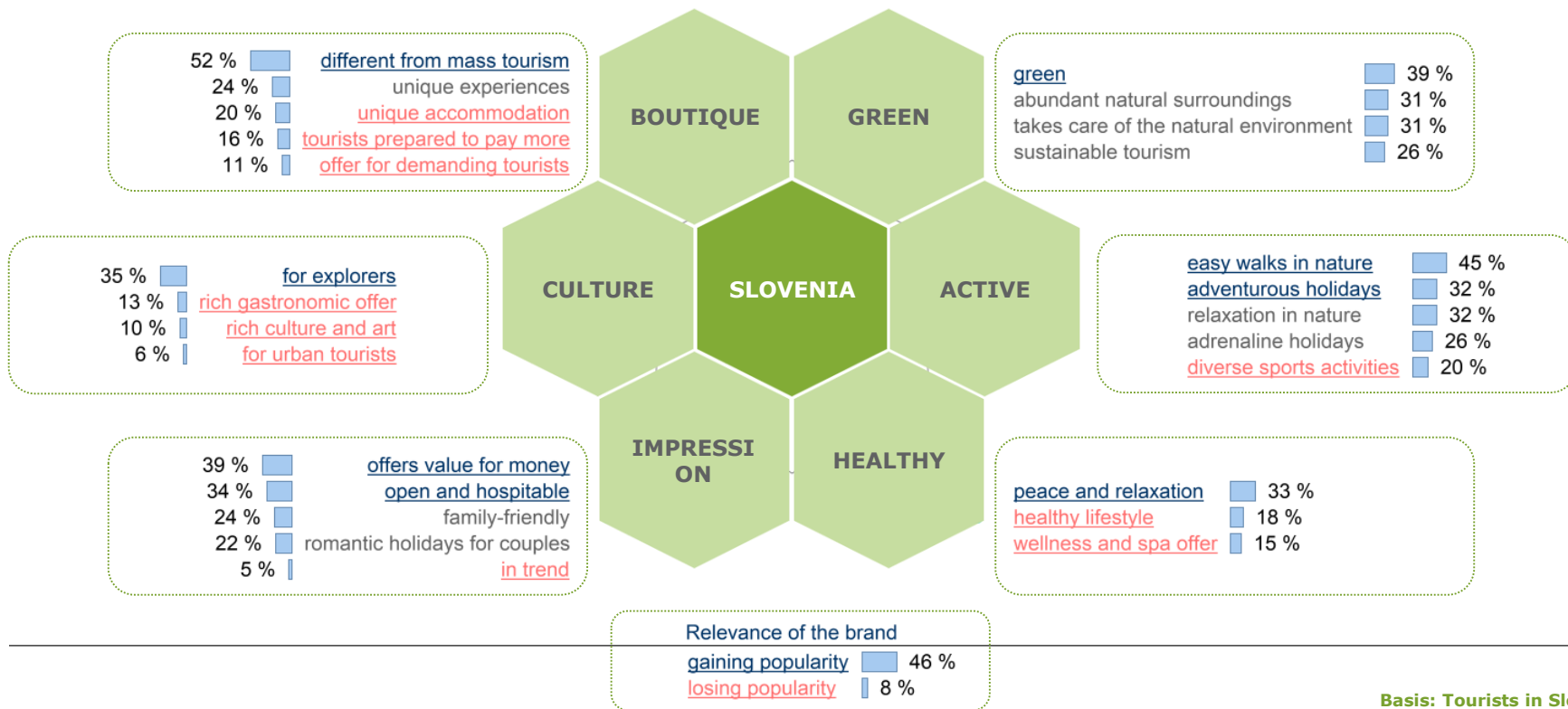


## NOTES:

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.

# THE NETHERLANDS: 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.

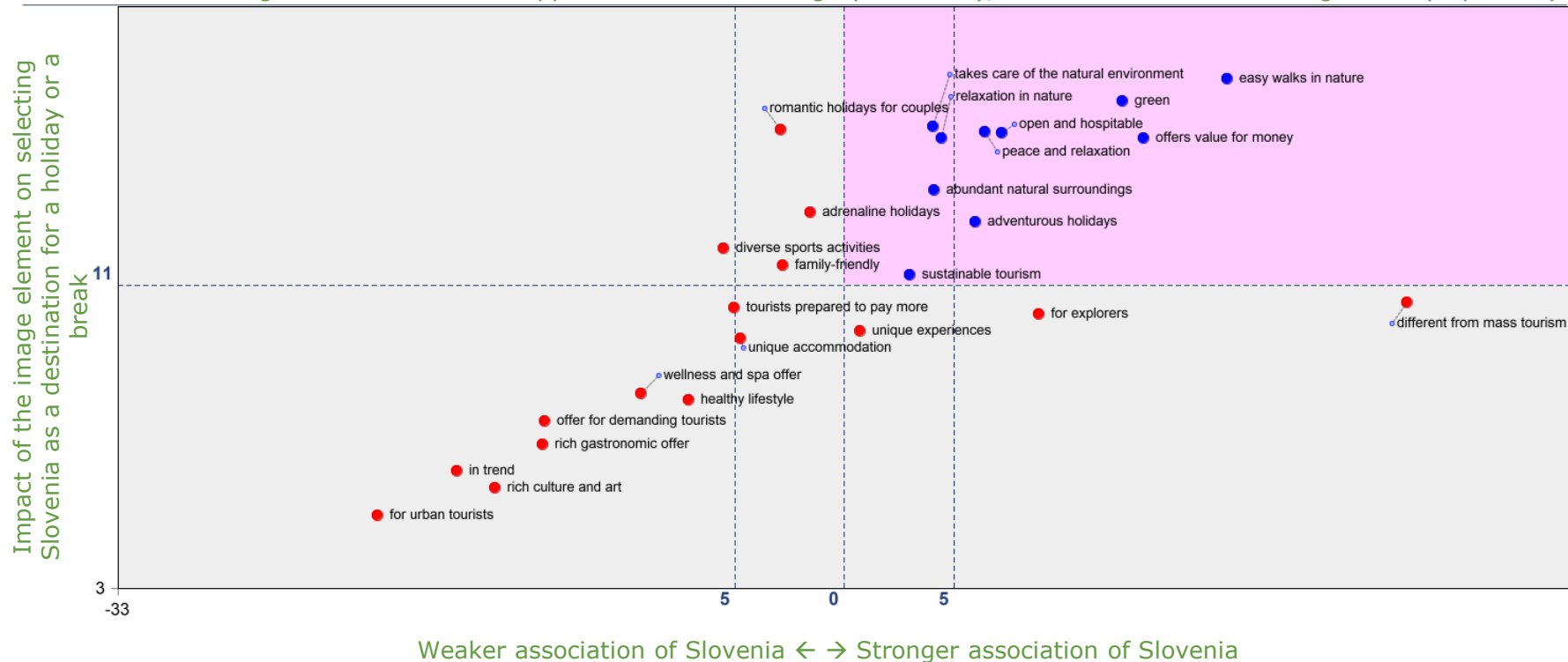
# THE NETHERLANDS: Significance of elements

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.

# THE NETHERLANDS: 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.



# THE NETHERLANDS: 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**

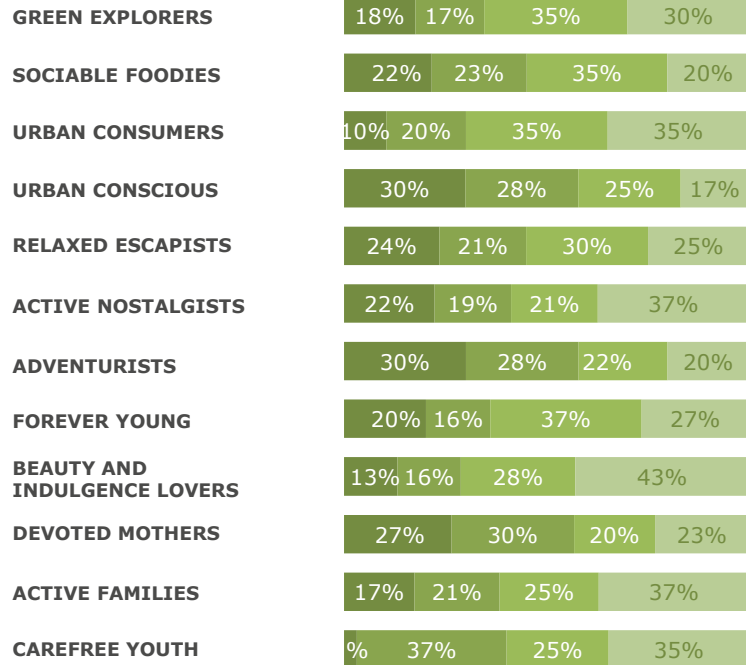


# THE NETHERLANDS: Knowledge of, and experience with, Slovenia



## KNOWLEDGE OF SLOVENIA

Basis: sample

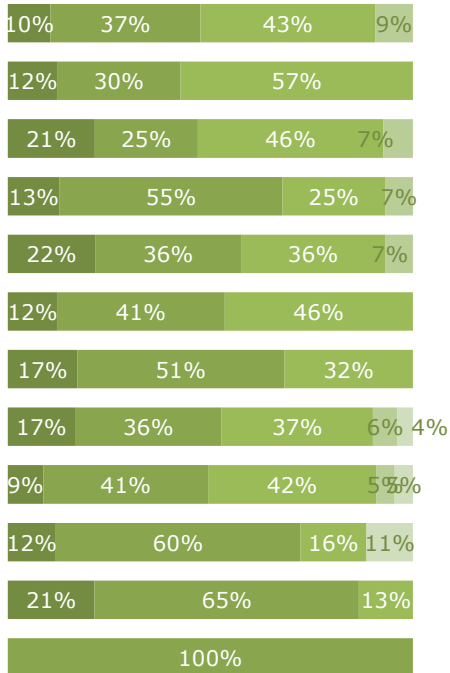


Knowledge:



## SATISFACTION

Basis: visitors to Slovenia

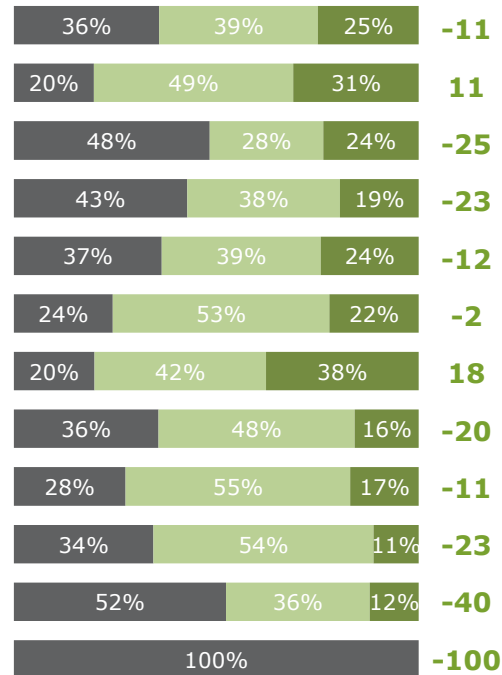


Meeting of expectations:



## NPS – DEGREE OF RECOMMENDATION

NPS Index



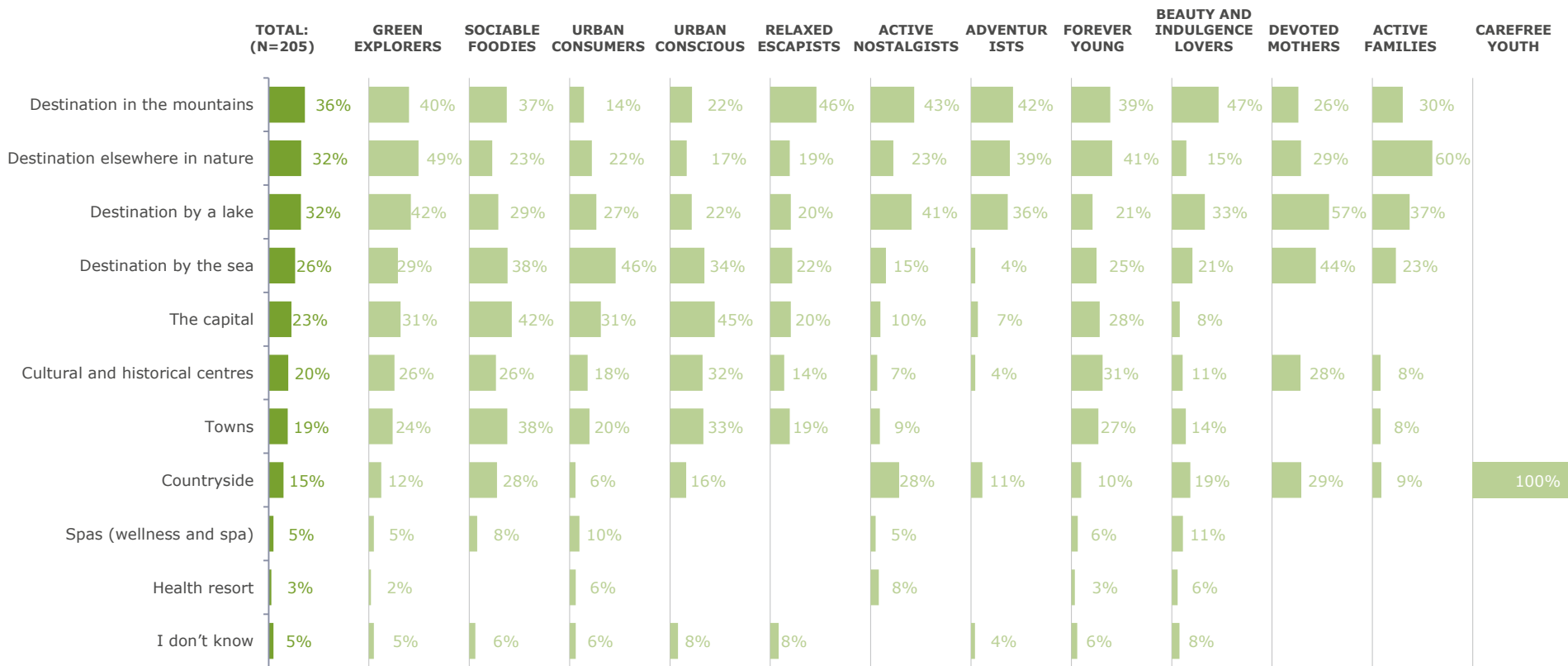
Recommendations:



**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.

# THE NETHERLANDS: Destination type in Slove

*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.

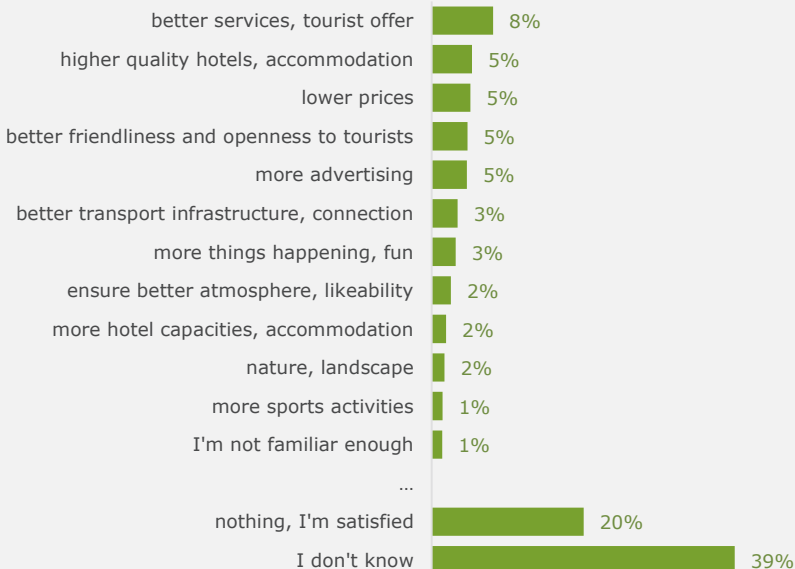
# THE NETHERLANDS: Opportunities for improvement and elements of excitement

*Subsample: visitors to Slovenia*



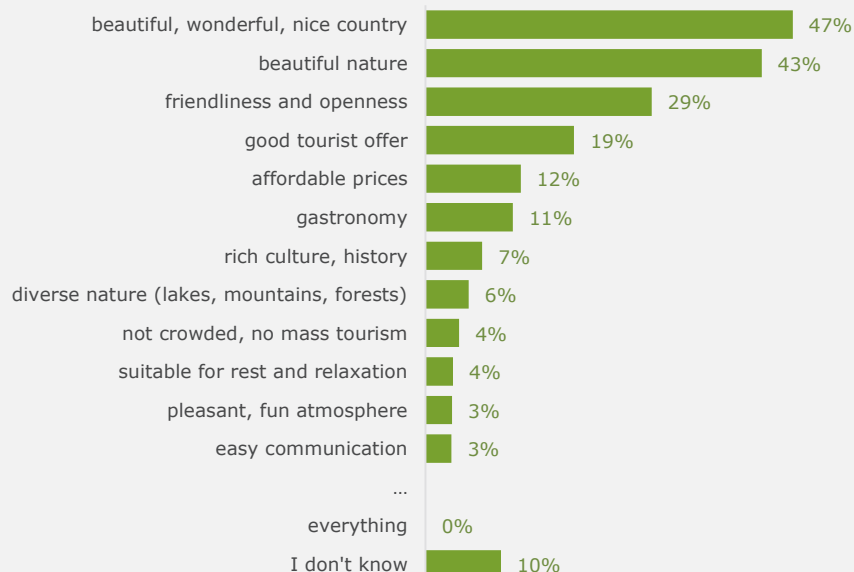
## Opportunities for improvement – Top 12

*Gossipers and neutral (would not recommend Slovenia), n=215*



## Elements of excitement – Top 12

*Promoters (would recommend Slovenia), n=61*



**NOTES:**

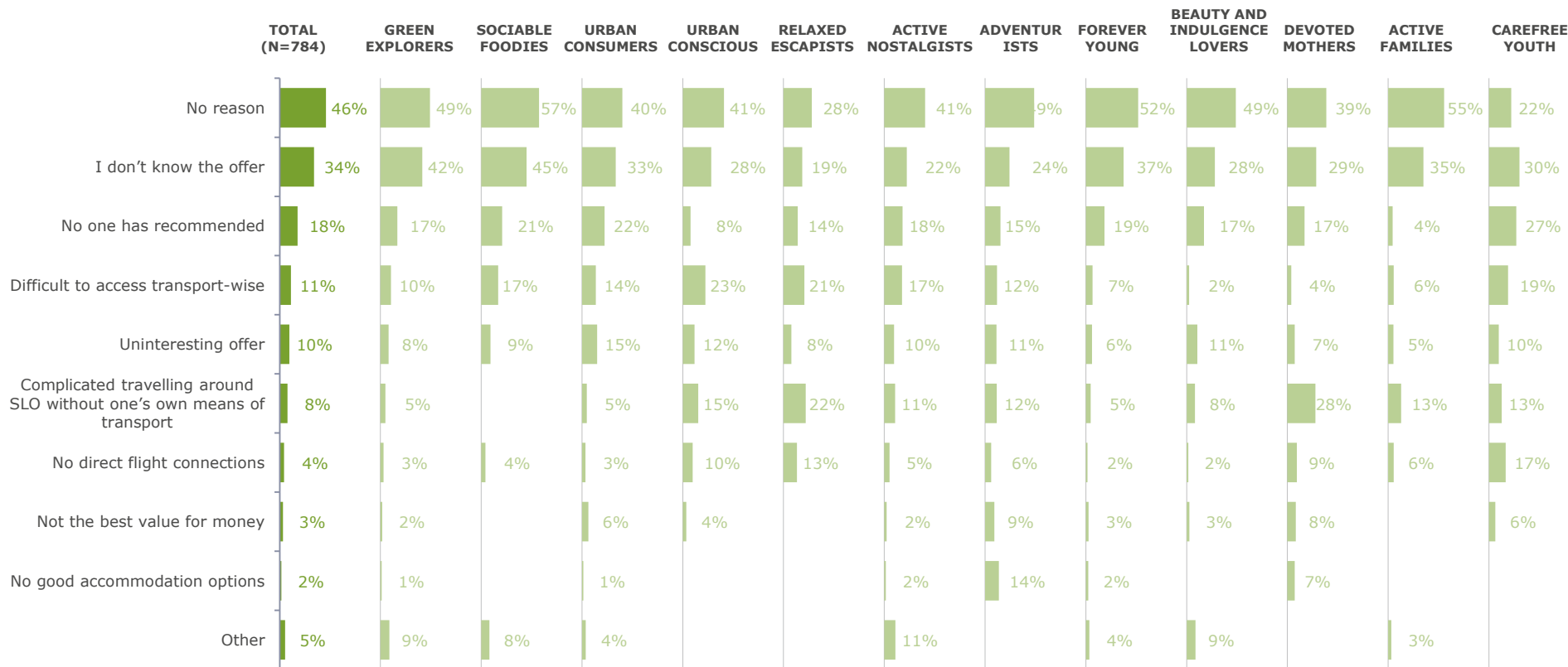
OTHER STATEMENTS: more attractions, sights, gastronomy, offer of local goods and own culture, knowledge of foreign languages

**NOTES:**

OTHER STATEMENTS: attractive 'sun and sea' product, proximity, location, cleanliness and orderliness, attractions, sights, green country

# THE NETHERLANDS: 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**

## THE NETHERLANDS: Green explorers (22.4%)



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	65%	+29
----------	-----	-----

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

TYPE OF  
ACCOMMODATION

Apartment	72%	+22
-----------	-----	-----

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	41%	+4
-----	-----	----

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

TRANSPORT AT THE  
DESTINATION

Car	78%	+2
-----	-----	----

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

## ACTIVITIES

Sightseeing of old town centres	83%	+23
Sightseeing of town, the	78%	+18

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

## MOTIVATION

Past experience	49%	+6
Recommendations from friends	43%	+8

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

## SOURCE OF INFORMATION

Articles on the Internet	59%	+8
Web portals	34%	+6

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

## RESERVATION METHOD

Booking.com	45%	+6
Directly at the accommodation provider	38%	+8

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

## TRAVELLING WITH

As a couple	44%	+5
Family	31%	-1
Alone	8%	+1
Friends	11%	-2

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

## CHARACTERISTICS:

Size*	2,447,277
Share*	14%
Age	41
Women	56%

Spring	20%
Summer	66%
Shorter trips	2
Longer trips	1

## THE NETHERLANDS: General travel habits and motivation



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	10,916,81		16%
Proportion	64%		68%
Age	40		2
Women	47%	Longer trips	2

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

## TRAVELLING WITH:

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

Alone	8%
Relatives	7%

## DESTINATION TYPE:

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

Elsewhere in nature	12%	30%	41%
---------------------	-----	-----	-----

4x

Frequency of travelling abroad irrespective of the length

## ACTIVITIES – TOP 10:

Sightseeing of old town 61%

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

Recreation	49%
History and castles	44%
Shopping	43%
Tourist attractions	42%
Touring	34%
Sports attractions	33%

## TRAVEL MOTIVES:

Relaxation 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)

Spend time with partner	7%	27%
Experience another culture	6%	25%
Rest, slow down the pace of life	6%	22%
Enjoy good food, drinks	2%	21%
Visit a town, the capital	6%	21%
Spend time with family, strengthen bonds	6%	19%

## VISITING COUNTRIES:

any 46% 67%

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)

United Kingdom	32%	46%
Austria	29%	43%
Greece	29%	40%
Non-European countries	21%	34%
Turkey	13%	31%
Slovenia	3%	6%

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).

## THE NETHERLANDS: 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



55

MOTORHOME COACH

TRAIN



2

19

□ To the destination

■ At the destination (14% ON FOOT, 5% BICYCLE, 3% MOTORCYCLE)

## PRICE SENSITIVITY:

Accommodation 78% 3%

Additional

Food 13% 73% 14%

Shopping 23% 67% 10%

■ 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.

Hostel: 15%

## 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)

Priporočila 35%

Agencies 23%

Accommodation provider 30%

Bližina 28%

Travel literature 21%

Expedia.com 4%

Članki - splet 23%

Opinion in social media 17%

Airbnb 12%

## 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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