



IDENTIFICATION OF MARKET POTENTIAL

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

November 2018



Contracting Authority

Name: Slovenian Tourist Board

Address: Dimičeva ulica 13, 1000 Ljubljana

Contact person: Barbara Zmrzlikar

Contractor

Name: Valicon d.o.o.

Address: Kopitarjeva 2, 1000 Ljubljana

Contact person: Matjaž Robinšak

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





7
countries

SWEDEN

DENMARK

BELGIUM

CZECH REPUBLIC

SWITZERLAND

HUNGARY

SPAIN



REPRESENTATIVE SAMPLE

23.597

respondents



10.916

representatives of
the target group



2.219

tourists and visitors to
Slovenia

12

PERSONAS



T = 19:52

Average duration of the survey



27 September – 17 October 2018

Period of data collection

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

VALICON

Global provider of web panels:





About the project

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

- Belgium
- Czech Republic
- Denmark
- Hungary
- Spain
- Sweden
- Switzerland





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



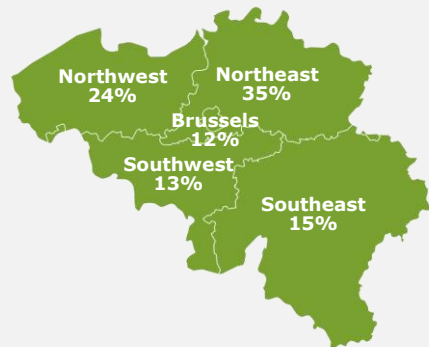
Method of implementation	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
Country of implementation	Belgium
Implementation period	12 October - 15 October 2018
Target group	Citizens of a certain country, who <u>travel abroad at least once a year for a break, holiday or a trip and spend at least two nights there.</u>
Sample	Entire sample: n=2.744; Target group: n=1.519; Visitors to Slovenia: n=222; Tourists in Slovenia: n=67.
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.
Length of the questionnaire	Average duration of the survey: t=20:00.



BELGIUM: Sample demographics



REGIONS:



DETAILED DEFINITION OF REGIONS:

Northwest: East Flanders, West Flanders.
Northeast: Antwerp, Limburg, Flemish Brabant.
Southwest: Walloon Brabant, Hainault.
Southeast: Liège, Luxembourg, Namur. **Brussels.**

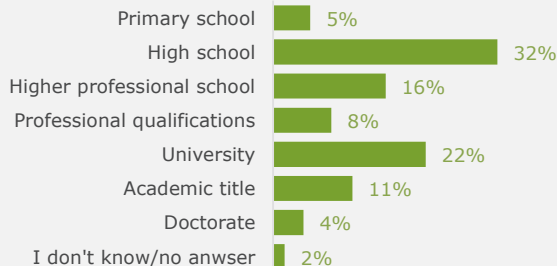
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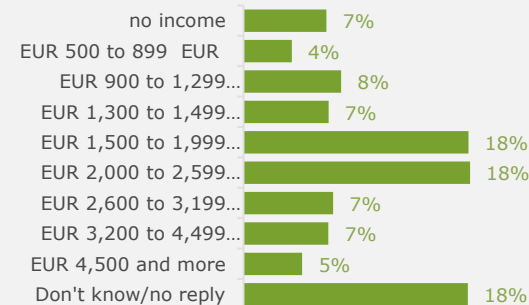
AGE:



EDUCATION:



PERSONAL INCOME:





Sample shares and sizes



Bordered ellipses show the basis for share calculations.



Basis: BELGIUM 18-65 years	
POPULATION (18-65 YEARS)	100,0%
TARGET GROUP	56,2 %
VISITORS TO SLOVENIA	8,2%
TOURISTS IN SLOVENIA	2,5%

Basis: TARGET GROUP	
POPULATION (18-65 YEARS)	/
TARGET GROUP	100,0%
VISITORS TO SLOVENIA	14,6%
TOURISTS IN SLOVENIA	4,4%

Absolute size*	
	7.075.878
	3.977.733
	580.092
	175.266

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

MARKET STRUCTURE AND SIZE (PERSONAS)



BELGIUM: Size of the potential



Top choice

0,2%

**NARROW
POTENTIAL**
Top choice +
repeated visit

2%

3%

**BROAD
POTENTIAL**
Choice

7%

24%

Visit or choice

9%

9%

BEL

n=1519

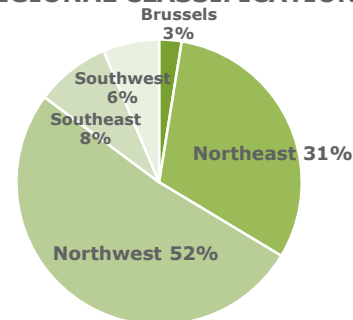
NARROW POTENTIAL:

2%

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

	Size*
Total in TG:	87.993
Brussels	2.239
Northeast	27.351
Northwest	45.346
Southeast	7.457
Southwest	5.601

REGIONAL CLASSIFICATION:



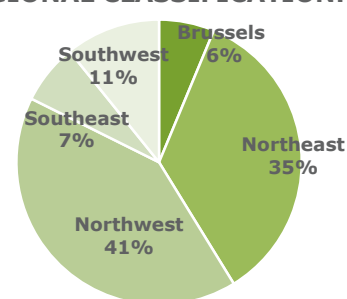
BROAD POTENTIAL:

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*
Total in TG:	275.535
Brussels	17.297
Northeast	96.279
Northwest	113.327
Southeast	18.876
Southwest	29.756

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.

BELGIUM: Size of segments by regions



GREEN EXPLORERS:

17,1%

681.898



URBAN CONSUMERS:

15,6%

622.138

BEAUTY AND
INDULGENCE LOVERS:

15,6%

620.721

	Total	Brussels	Northeast	Northwest	Southeast	Southwest
Size (%)	100,0%	12,3%	34,9%	24,0%	15,4%	13,4%
Size	3.977.733	487.628	1.388.715	956.205	611.393	533.793
GREEN EXPLORERS Size (%)	17,1%	10,1%	39,4%	26,7%	13,2%	10,5%
Size	681.898	69.036	268.877	182.129	90.122	71.733
SOCIABLE FOODIES Size (%)	8,0%	9,0%	30,9%	30,9%	17,3%	11,9%
Size	317.870	28.491	98.170	98.155	55.100	37.954
URBAN CONSUMERS Size (%)	15,6%	15,8%	29,9%	21,6%	15,3%	17,4%
Size	622.138	98.373	185.811	134.224	95.458	108.272
URBAN CONSCIOUS Size (%)	3,8%	16,8%	29,0%	20,2%	16,0%	18,0%
Size	151.816	25.476	44.034	30.696	24.341	27.270
RELAXED ESCAPISTS Size (%)	7,0%	15,3%	35,7%	16,4%	18,9%	13,7%
Size	276.491	42.276	98.680	45.246	52.308	37.982
ACTIVE NOSTALGISTS Size (%)	7,5%	13,2%	33,6%	20,5%	18,3%	14,3%
Size	299.504	39.684	100.680	61.317	54.887	42.936
ADVENTURISTS Size (%)	2,9%	14,3%	39,3%	21,8%	11,7%	12,8%
Size	116.412	16.675	45.790	25.434	13.645	14.868
FOREVER YOUNG Size (%)	12,1%	7,9%	38,7%	31,7%	10,4%	11,3%
Size	480.820	37.841	185.924	152.503	50.245	54.306
BEAUTY AND INDULGENCE LOVERS Size (%)	15,6%	12,7%	36,3%	19,2%	17,3%	14,5%
Size	620.721	78.707	225.376	119.196	107.353	90.090
DEVOTED MOTHERS Size (%)	3,6%	10,1%	34,1%	27,5%	20,2%	8,1%
Size	142.837	14.440	48.642	39.214	28.913	11.628
ACTIVE FAMILIES Size (%)	3,5%	11,1%	38,2%	22,7%	14,1%	13,8%
Size	137.343	15.264	52.529	31.226	19.430	18.893
CAREFREE YOUTH Size (%)	3,3%	16,4%	26,3%	28,4%	15,1%	13,8%
Size	129.882	21.364	34.201	36.866	19.592	17.859

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	68%
Towns	46%
Destination elsewhere in nature	37%
Cultural and historical centres in the mountains	36%
	34%

TYPE OF ACCOMMODATION

Hotel	79%
Apartment	38%
Private accommodation (e.g. Airbnb)	23%
Staying with relatives or friends	22%
Camp	20%

TRANSPORT TO THE DESTINATION

Aeroplane	54%
Car	38%
Train	3%
Motorhome (Camper)	2%
Coach	2%

TRANSPORT AT THE DESTINATION

Car	74%
Coach	25%
On foot	20%
Train	14%
Bicycle	6%

ACTIVITIES

Sightseeing of a town, the capital	58%
Sun and sea	58%
Sightseeing of old town centres	56%
Natural sights, nature	52%
Seeing major tourist attractions	43%

MOTIVATION

Past experience	43%
Price of the destination	43%
Recommendations from friends	40%
Proximity of the destination	25%
Articles on the Internet	24%

SOURCE OF INFORMATION

Friends, family	49%
Articles on the Internet	44%
Travel literature	26%
Web portals (TripAdvisor etc.)	25%
Agencies	21%

RESERVATION METHOD

Booking.com	47%
Agency	33%
Directly at the accommodation provider	25%
Airbnb	15%
Own accommodation	9%

TRAVELLING WITH

As a couple	42%
Family	32%
Friends	14%
Alone	7%
Relatives	4%

CHARACTERISTICS:

Size*	3.977.733
Share*	56%
Age	40
Women	49%

Spring	20%
Summer	67%
Shorter trips	2
Longer trips	1

BELGIUM: Visitors to Slovenia (14,6%)



DESTINATION TYPE

In the mountains	47%	+13
Elsewhere in nature	39%	+2
By a lake	36%	+8
Cultural and historical centres	37%	+1
Capitals	35%	+2

TYPE OF ACCOMMODATION

Apartments	46%	+9
Camp	25%	+5
Hostel	21%	+5
Private accommodation (e.g. Airbnb)	24%	+1
Camper	8%	+3

TRANSPORT TO THE DESTINATION

Motorhome (camper)	5%	+3
Aeroplane	52%	-2
Coach	3%	+1
Ship or another vessel	2%	+1
Car	34%	-3

TRANSPORT AT THE DESTINATION

Car	71%	-3
Motorhome (camper)	8%	+4
Coach	20%	-6
Train	12%	-2
Motorcycle	7%	+4

ACTIVITIES

Sightseeing of old town centres	59%	+3
Sports activities	37%	+4
Touring	30%	+6
Winter sports	19%	+8
History and castles	41%	+1

MOTIVATION

Travel literature	29%	+8
Past experience	43%	+0
Travel presentations	19%	+6
TV programmes	18%	+4
Recommendations from friends	37%	-3

SOURCE OF INFORMATION

Travel literature	31%	+5
Blogs	19%	+6
Articles in print media	19%	+7
Friends, family	48%	-1
Opinions in social media	20%	+1

RESERVATION METHOD

Booking.com	57%	+11
Expedia.com	14%	+5
Agoda.com	8%	+4
Airbnb	19%	+4
Organiser	12%	+5

TRAVELLING WITH

As a couple	45%	+2
Alone	11%	+4
Family	24%	-8
Friends	15%	+0
Relatives	6%	+2

CHARACTERISTICS:

Size*	580.092
Share*	8%
Age	40
Women	36%

Spring	20%
Summer	67%
Shorter trips	3
Longer trips	2

NOTES:

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

BELGIUM: Tourists in Slovenia (4,4%)



DESTINATION TYPE

<u>In the mountains</u>	53%	+19
<u>By a lake</u>	44%	+16
Elsewhere in nature	44%	+6
Cultural and historical centres	43%	+7
By the sea	65%	-2

TYPE OF ACCOMMODATION

<u>Apartments</u>	50%	+12
<u>Camp</u>	34%	+14
Hotel	83%	+4
Private accommodation (e.g. Airbnb)	28%	+5
Boutique hotel	11%	+2

TRANSPORT TO THE DESTINATION

<u>Coach</u>	6%	+4
Car	41%	+4
<u>Motorhome (camper)</u>	6%	+4
Aeroplane	46%	-8
Motorcycle	1%	+0

TRANSPORT AT THE DESTINATION

Car	78%	+5
Coach	22%	-3
Motorhome (camper)	7%	+3
Train	8%	-6
Motorcycle	2%	-1

ACTIVITIES

<u>Sightseeing of old town centres</u>	71%	+15
<u>Natural sights, nature</u>	67%	+15
<u>Touring</u>	49%	+25
<u>Sports activities</u>	49%	+16
<u>Seeing major tourist attractions</u>	56%	+13

MOTIVATION

Travel literature	29%	+9
Past experience	47%	+4
TV programmes	23%	+9
Articles on the Internet	30%	+5
Recommendations from friends	44%	+4

SOURCE OF INFORMATION

Web portals (TripAdvisor etc.)	36%	+11
Articles on the Internet	53%	+9
<u>Blogs</u>	24%	+11
Opinions in social media	27%	+8
Friends, family	47%	-2

RESERVATION METHOD

Booking.com	58%	+11
<u>Expedia.com</u>	22%	+13
<u>Own accommodation</u>	17%	+8
Airbnb	18%	+2
At the activity provider	9%	+4

TRAVELLING WITH

As a couple	44%	+2
Family	31%	-1
Relatives	6%	+2
Friends	13%	-1
Alone	6%	-1

CHARACTERISTICS:

Size*	175.266
Share*	2%
Age	38
Women	38%

Spring	16%
Summer	71%
Shorter trips	3
Longer trips	2

BELGIUM: Green Explorers (17,1%)



DESTINATION TYPE

Cultural and historical centres	69%	+33
In the mountains	65%	+31
By the sea	85%	+18
Towns	71%	+24
Capitals	59%	+26

TYPE OF ACCOMMODATION

Apartments	60%	+23
Private accommodation (e.g. Airbnb)	32%	+9
Hotel	81%	+2
Staying with relatives or friends	24%	+3
Camp	24%	+4

TRANSPORT TO THE DESTINATION

Aeroplane	56%	+2
Coach	2%	+1
Car	38%	+1
Motorhome (camper)	2%	+0
Ship or another vessel	0%	+0

TRANSPORT AT THE DESTINATION

Coach	29%	+4
Train	20%	+5
Bicycle	11%	+5
Car	77%	+3
On foot	23%	+3

ACTIVITIES

Sightseeing of old town centres	84%	+28
Natural sights, nature	77%	+26
Sightseeing of a town, the capital	81%	+23
Sports activities	57%	+24
History and castles	50%	+10

MOTIVATION

Recommendations from friends	52%	+12
Price of the destination	53%	+11
Travel literature	29%	+8
Proximity of the destination	29%	+5
TV programmes	22%	+8

SOURCE OF INFORMATION

Articles on the Internet	55%	+11
Friends, family	56%	+7
Web portals (TripAdvisor etc.)	34%	+9
Travel literature	32%	+6
Agencies	24%	+3

RESERVATION METHOD

Booking.com	55%	+8
Airbnb	20%	+5
Organiser	11%	+3
Directly at the accommodation provider	25%	+0
Agency	30%	-3

TRAVELLING WITH

As a couple	44%	+1
Friends	19%	+5
Family	26%	-6
Relatives	5%	+1
Alone	6%	-1

CHARACTERISTICS:

Size*	681.898
Share*	10%
Age	39
Women	50%

Spring	23%
Summer	66%
Shorter trips	2
Longer trips	1

BELGIUM: Urban consumers (15,6%)



DESTINATION TYPE

Towns	76%	+29
Capitals	38%	+5
By the sea	55%	-12
Cultural and historical centres	28%	-8
Spas (wellness and spa)	6%	-5

TYPE OF ACCOMMODATION

Hotel	91%	+12
Private accommodation (e.g. Airbnb)	25%	+2
Staying with relatives or friends	22%	+0
Own accommodation	16%	+2
Camp	18%	-3

TRANSPORT TO THE DESTINATION

Aeroplane	60%	+6
Car	35%	-3
Train	3%	+0
Coach	2%	+0

TRANSPORT AT THE DESTINATION

Car	75%	+1
Coach	27%	+2
On foot	22%	+2
Train	18%	+3
Bicycle	3%	-3

ACTIVITIES

Shopping	67%	+27
Sightseeing of a town, the capital	78%	+19
Gastronomic delights	46%	+15
Seeing major tourist attractions	50%	+7
Social events, festivals	36%	+14

MOTIVATION

Price of the destination	49%	+7
Past experience	45%	+2
Proximity of the destination	28%	+3
Popularity of the destination	27%	+4
Recommendations from friends	42%	+2

SOURCE OF INFORMATION

Agencies	27%	+6
Friends, family	50%	+1
Web portals (TripAdvisor etc.)	26%	+1
Opinions in social media	23%	+4
Web forums	14%	+1

RESERVATION METHOD

Booking.com	52%	+5
Airbnb	18%	+3
Directly at the accommodation provider	26%	+0
Own accommodation	11%	+2
Other web portal	8%	+2

TRAVELLING WITH

As a couple	40%	-2
Friends	21%	+6
Alone	7%	+0
Family	29%	-3
Relatives	3%	-1

CHARACTERISTICS:

Size*	622.138
Share*	9%
Age	40
Women	57%

Spring	24%
Summer	61%
Shorter trips	2
Longer trips	1

BELGIUM: Beauty and indulgence lovers (15,6%



DESTINATION TYPE

By the sea	95%	+27
Spas (wellness and spa)	31%	+20
Capitals	25%	-8
Towns	31%	-15
By a lake	23%	-5

TYPE OF
ACCOMMODATION

Hotel	87%	+7
Apartments	36%	-2
Staying with relatives or friends	22%	+0
Own accommodation	15%	+1
<u>Camper</u>	<u>7%</u>	<u>+1</u>

TRANSPORT TO THE
DESTINATION

<u>Aeroplane</u>	<u>57%</u>	<u>+3</u>
Car	37%	+0
Train	3%	+0
Motorcycle	1%	+0
Coach	1%	-1

TRANSPORT AT THE
DESTINATION

Car	77%	+3
<u>On foot</u>	<u>24%</u>	<u>+4</u>
Coach	24%	-2
Bicycle	4%	-2
Train	7%	-7

ACTIVITIES

Sun and sea	87%	+29
Wellness in spa	47%	+25
Shopping	58%	+18
Recreation	57%	+19
<u>Aquafun, amusement parks</u>	<u>38%</u>	<u>+15</u>

MOTIVATION

Price of the destination	47%	+4
Popularity of the destination	30%	+8
Past experience	46%	+4
Suitability of the destination in all seasons	26%	+5
<u>Recommendations from friends</u>	<u>43%</u>	<u>+3</u>

SOURCE OF
INFORMATION

Friends, family	54%	+5
<u>Agencies</u>	<u>25%</u>	<u>+4</u>
Articles on the Internet	43%	+0
Web portals (TripAdvisor etc.)	25%	+0
Opinions in social media	18%	-1

RESERVATION METHOD

<u>Agency</u>	<u>43%</u>	<u>+10</u>
Directly at the accommodation provider	26%	+1
Other web portal	9%	+3
Own accommodation	9%	-1
Other	2%	+0

TRAVELLING WITH

Family	46%	+14
As a couple	42%	-1
Relatives	4%	+0
Friends	6%	-8
Alone	3%	-4

CHARACTERISTICS:

Size*	620.721
Share*	9%
Age	42
Women	58%

Spring	14%
Summer	75%
Shorter trips	2
Longer trips	2

BELGIUM: Forever young (12,1%)



DESTINATION TYPE

Cultural and historical centres	32%	-4
Capitals	26%	-7
By the sea	53%	-15
Towns	29%	-17
Countryside	14%	-8

TYPE OF ACCOMMODATION

Hotel	88%	+9
Private accommodation (e.g. Airbnb)	20%	-3
Staying with relatives or friends	18%	-4
Own accommodation	12%	-2
Boutique hotel	7%	-2

TRANSPORT TO THE DESTINATION

Aeroplane	58%	+4
Motorcycle	3%	+2
Coach	2%	+0
Car	34%	-3
Bicycle	1%	+0

TRANSPORT AT THE DESTINATION

Coach	29%	+3
Car	70%	-4
On foot	18%	-2
Motorcycle	5%	+1
Bicycle	6%	+0

ACTIVITIES

<u>Sightseeing of old town centres</u>	77%	+20
<u>History and castles</u>	65%	+25
<u>Sightseeing of a town, the capital</u>	69%	+11
<u>Touring</u>	48%	+24
<u>Seeing major tourist attractions</u>	57%	+14

MOTIVATION

TV programmes	21%	+7
Recommendations from friends	39%	-1
Proximity of the destination	25%	+0
Popularity of the destination	23%	+0
Suitability of the destination in all seasons	21%	+0

SOURCE OF INFORMATION

Articles on the Internet	47%	+3
Travel literature	29%	+3
Agencies	26%	+5
Articles in print media	15%	+4
Opinions in social media	19%	+0

RESERVATION METHOD

Agency	42%	+9
Booking.com	45%	-1
Own accommodation	11%	+2
Organiser	8%	+0
Through official TICs	5%	+0

TRAVELLING WITH

As a couple	44%	+1
Family	31%	-1
Alone	8%	+1
Friends	13%	-1
Relatives	4%	+0

CHARACTERISTICS:

Size*	480.820
Share*	7%
Age	43
Women	44%

Spring	18%
Summer	70%
Shorter trips	2
Longer trips	1

BELGIUM: Sociable foodies (8,0%)



DESTINATION TYPE

Cultural and historical centres	77%	+41
By the sea	85%	+17
Towns	70%	+24
Capitals	56%	+23
Countryside	45%	+23

TYPE OF ACCOMMODATION

Hotel	90%	+11
Private accommodation (e.g. Airbnb)	24%	+1
Boutique hotel	16%	+7
Own accommodation	18%	+3
Staying with relatives or friends	22%	+0

TRANSPORT TO THE DESTINATION

Aeroplane	56%	+2
Train	4%	+1
Car	36%	-1
Motorhome (camper)	2%	+0
Ship or another vessel	1%	+0

TRANSPORT AT THE DESTINATION

Car	80%	+6
Train	21%	+6
Coach	28%	+3
On foot	24%	+4
Bicycle	5%	-1

ACTIVITIES

History and castles	84%	+45
Sightseeing of a town, the capital	92%	+34
Sightseeing of old town centres	92%	+36
Seeing major tourist attractions	81%	+38
Natural sights, nature	82%	+30

MOTIVATION

Past experience	51%	+8
Proximity of the destination	33%	+8
Travel literature	30%	+10
Price of the destination	48%	+6
Articles on the Internet	30%	+5

SOURCE OF INFORMATION

Friends, family	56%	+7
Articles on the Internet	52%	+9
Travel literature	40%	+15
Web portals (TripAdvisor etc.)	28%	+3
Articles in print media	15%	+4

RESERVATION METHOD

Booking.com	59%	+12
Directly at the accommodation provider	35%	+10
Expedia.com	10%	+1
Other web portal	8%	+2
Agency	31%	-2

TRAVELLING WITH

As a couple	51%	+9
Family	38%	+6
Friends	7%	-8
Relatives	3%	-1
Alone	1%	-6

CHARACTERISTICS:

Size*	317.870
Share*	4%
Age	42
Women	61%

Spring	24%
Summer	68%
Shorter trips	2
Longer trips	1

BELGIUM: Active nostalgists (7,5%)



DESTINATION TYPE

<u>In the mountains</u>	66%	+31
<u>Elsewhere in nature</u>	64%	+27
<u>By a lake</u>	50%	+21
<u>Countryside</u>	34%	+11
By the sea	50%	-17

TYPE OF
ACCOMMODATION

<u>Boutique hotel</u>	24%	+15
<u>Hotel</u>	84%	+5
Hostel	19%	+2
<u>Tourist farm</u>	13%	+6
Apartments	29%	-9

TRANSPORT TO THE
DESTINATION

<u>Car</u>	49%	+12
<u>Motorhome (camper)</u>	4%	+2
<u>Motorcycle</u>	3%	+2
Aeroplane	41%	-13
Coach	1%	-1

TRANSPORT AT THE
DESTINATION

<u>Car</u>	80%	+6
<u>Motorcycle</u>	9%	+6
On foot	18%	-2
<u>Bicycle</u>	8%	+2
Coach	15%	-10

ACTIVITIES

<u>Sports activities</u>	58%	+25
<u>Natural sights, nature</u>	57%	+5
<u>Gastronomic delights</u>	36%	+6
<u>Visit to a wine cellar</u>	24%	+13
History and castles	39%	-1

MOTIVATION

Past experience	47%	+4
Articles on the Internet	23%	-1
Proximity of the destination	23%	-1
Travel literature	19%	-1
Travel presentations	16%	+3

SOURCE OF
INFORMATION

Travel literature	27%	+1
Travel presentations	18%	+4
Blogs	15%	+1
Friends, family	40%	-9
Web portals (TripAdvisor etc.)	20%	-5

RESERVATION METHOD

Agency	35%	+2
Directly at the accommodation provider	26%	+1
Organiser	9%	+1
Booking.com	44%	-3
Through official TICs	5%	+1

TRAVELLING WITH

<u>As a couple</u>	53%	+10
Family	31%	-1
Friends	8%	-6
Alone	5%	-3
Relatives	3%	-1

CHARACTERISTICS:

Size*	299.504
Share*	4%
Age	41
Women	34%

Spring	19%
Summer	67%
Shorter trips	3
Longer trips	1

BELGIUM: Relaxed escapists (7,0%)



DESTINATION TYPE

Elsewhere in nature	31%	-6
Countryside	22%	+0
By the sea	51%	-17
By a lake	20%	-9
Cultural and historical centres	20%	-16

TYPE OF ACCOMMODATION

Hotel	80%	+0
Private accommodation (e.g. Airbnb)	21%	-2
Own accommodation	13%	-1
Staying with relatives or friends	18%	-3
Hostel	14%	-2

TRANSPORT TO THE DESTINATION

Aeroplane	58%	+4
Coach	2%	+1
Train	3%	+0
Motorhome (camper)	2%	+0
Car	34%	-3

TRANSPORT AT THE DESTINATION

Coach	25%	-1
Car	71%	-3
Motorhome (camper)	6%	+2
On foot	15%	-5
Motorcycle	3%	-1

ACTIVITIES

Natural sights, nature	57%	+6
Thermal health spa	29%	+16
Gastronomic delights	38%	+8
Selfness, digital-detox, etc.	17%	+13
Cruises	14%	+6

MOTIVATION

Travel presentations	16%	+2
Articles on the Internet	21%	-3
Articles in print media	12%	+4
Recommendations from friends	32%	-8
Past experience	34%	-8

SOURCE OF INFORMATION

Agencies	21%	+0
Travel literature	22%	-4
Blogs	14%	+0
Articles on the Internet	35%	-8
Friends, family	38%	-10

RESERVATION METHOD

Agency	45%	+12
Expedia.com	15%	+6
Booking.com	43%	-3
Organiser	12%	+4
Agoda.com	7%	+3

TRAVELLING WITH

As a couple	46%	+4
Alone	16%	+8
Family	23%	-9
Friends	13%	-1
Relatives	3%	-1

CHARACTERISTICS:

Size*	276.491
Share*	4%
Age	39
Women	46%

Spring	23%
Summer	59%
Shorter trips	2
Longer trips	1

BELGIUM: Urban conscious (3,8%)



DESTINATION TYPE

Towns	69%	+23
Capitals	60%	+27
Cultural and historical centres	52%	+16
Countryside	18%	-5
In the mountains	17%	-17

TYPE OF ACCOMMODATION

Hostel	44%	+28
Private accommodation (e.g. Airbnb)	28%	+5
Boutique hotel	18%	+9
Tourist farm	17%	+10
Staying with relatives or friends	25%	+3

TRANSPORT TO THE DESTINATION

Motorhome (camper)	8%	+6
Aeroplane	62%	+8
Coach	7%	+5
Train	7%	+4
Car	13%	-24

TRANSPORT AT THE DESTINATION

Coach	38%	+13
Train	30%	+16
Car	48%	-26
On foot	24%	+4
Motorhome (camper)	7%	+3

ACTIVITIES

Museums, galleries and art	64%	+38
Learning about the local way of life	52%	+37
Sightseeing of old town centres	70%	+14
Social events, festivals	45%	+23
Sightseeing of a town, the capital	68%	+9

MOTIVATION

Travel literature	32%	+12
Travel presentations	24%	+11
Price of the destination	40%	-3
Posts on social media, blogs	21%	+5
Past experience	39%	-4

SOURCE OF INFORMATION

Blogs	21%	+8
Travel literature	34%	+8
Articles on the Internet	46%	+2
Friends, family	43%	-6
Travel presentations	18%	+5

RESERVATION METHOD

Airbnb	33%	+18
Booking.com	49%	+3
Expedia.com	19%	+10
Agoda.com	8%	+4
Directly at the accommodation provider	23%	-2

TRAVELLING WITH

Alone	17%	+10
As a couple	40%	-2
Family	21%	-11
Friends	15%	+1
Relatives	7%	+3

CHARACTERISTICS:

Size*	151.816
Share*	2%
Age	40
Women	50%

Spring	28%
Summer	46%
Shorter trips	3
Longer trips	2

BELGIUM: Devoted mothers (3,6%)



DESTINATION TYPE

By a lake	51%	+23
In the mountains	50%	+16
Elsewhere in nature	38%	+1
Countryside	31%	+9
By the sea	46%	-22

TYPE OF
ACCOMMODATION

Apartments	57%	+20
Tourist farm	25%	+17
Staying with relatives or friends	29%	+7
Camp	29%	+9
Own accommodation	23%	+8

TRANSPORT TO THE
DESTINATION

Car	60%	+22
Ship or another vessel	4%	+4
Train	6%	+3
Motorhome (camper)	5%	+3
Aeroplane	22%	-32

TRANSPORT AT THE
DESTINATION

Car	77%	+3
Motorcycle	9%	+5
Coach	10%	-15
Motorhome (camper)	5%	+1
On foot	9%	-11

ACTIVITIES

Countryside, farm activities	34%	+24
Sports activities	42%	+9
Activities and fun for children	32%	+19
Natural sights, nature	53%	+1
Selfness, digital-detox, etc.	13%	+8

MOTIVATION

Articles on the Internet	27%	+3
Past experience	39%	-4
Price of the destination	38%	-5
Travel literature	18%	-2
TV ads	9%	+5

SOURCE OF
INFORMATION

Web forums	17%	+4
Articles on the Internet	42%	-2
Articles in print media	15%	+3
Friends, family	42%	-6
Blogs	13%	-1

RESERVATION METHOD

Directly at the accommodation provider	33%	+8
Agoda.com	14%	+11
Own accommodation	16%	+6
At the activity provider	11%	+6
Booking.com	34%	-13

TRAVELLING WITH

Family	38%	+6
Friends	19%	+4
As a couple	30%	-12
Alone	7%	+0
Relatives	6%	+2

CHARACTERISTICS:

Size*	142.837
Share*	2%
Age	40
Women	44%

Spring	24%
Summer	59%
Shorter trips	2
Longer trips	2

BELGIUM: Active families (3,5%)



DESTINATION TYPE

<u>Elsewhere in nature</u>	79%	+42
<u>In the mountains</u>	68%	+34
<u>By a lake</u>	49%	+20
By the sea	59%	-8
<u>Countryside</u>	29%	+7

TYPE OF ACCOMMODATION

<u>Camp</u>	38%	+18
<u>Apartments</u>	52%	+15
<u>Hostel</u>	30%	+14
<u>Private accommodation (e.g. Airbnb)</u>	33%	+11
Own accommodation	25%	+11

TRANSPORT TO THE DESTINATION

<u>Car</u>	48%	+11
Motorhome (camper)	2%	+0
Train	2%	-1
Aeroplane	47%	-6

TRANSPORT AT THE DESTINATION

Car	79%	+5
Coach	30%	+5
<u>Train</u>	20%	+5
<u>Motorhome (camper)</u>	11%	+8
On foot	20%	+0

ACTIVITIES

<u>Sports activities</u>	71%	+38
<u>Water sports activities</u>	38%	+22
<u>Natural sights, nature</u>	64%	+12
<u>Learning about the local way of life</u>	30%	+15
<u>Touring</u>	32%	+7

MOTIVATION

Articles on the Internet	35%	+11
<u>Videos on the Internet</u>	23%	+13
Past experience	43%	+0
Price of the destination	42%	-1
Posts on social media, blogs	18%	+2

SOURCE OF INFORMATION

Blogs	28%	+14
Friends, family	53%	+4
Articles on the Internet	49%	+5
Web forums	20%	+7
Web portals (TripAdvisor etc.)	26%	+1

RESERVATION METHOD

<u>Directly at the accommodation provider</u>	38%	+12
<u>Airbnb</u>	26%	+11
At the activity provider	13%	+8
Booking.com	51%	+4
<u>Agoda.com</u>	11%	+7

TRAVELLING WITH

<u>Family</u>	41%	+9
<u>Alone</u>	11%	+4
As a couple	32%	-10
Friends	10%	-5
Relatives	6%	+2

CHARACTERISTICS:

Size*	137.343
Share*	2%
Age	35
Women	38%

Spring	7%
Summer	80%
Shorter trips	2
Longer trips	2

BELGIUM: Carefree youth (3,3%)



DESTINATION TYPE

<u>By the sea</u>	77%	+9
<u>Towns</u>	58%	+12
Countryside	20%	-2
Capitals	27%	-6
In the mountains	16%	-18

TYPE OF
ACCOMMODATION

<u>Hostel</u>	29%	+13
Apartments	43%	+5
Staying with relatives or friends	25%	+3
Camp	24%	+4
Other	6%	+2

TRANSPORT TO THE
DESTINATION

<u>Train</u>	10%	+7
Aeroplane	57%	+3
<u>Bicycle</u>	3%	+2
<u>Motorhome (camper)</u>	4%	+2
<u>Motorcycle</u>	4%	+3

TRANSPORT AT THE
DESTINATION

<u>Train</u>	26%	+12
Coach	25%	-1
<u>Bicycle</u>	12%	+6
Car	58%	-16
On foot	13%	-7

ACTIVITIES

<u>Music festivals and concerts</u>	50%	+36
<u>Social events, festivals</u>	45%	+24
<u>Nightlife (bars, clubs)</u>	40%	+29
Sightseeing of a town, the capital	55%	-4
Water sports activities	20%	+4

MOTIVATION

<u>Recommendations from friends</u>	49%	+9
Past experience	42%	-1
<u>Videos on the Internet</u>	16%	+6
<u>TV ads</u>	13%	+8
Popularity of the destination	19%	-4

SOURCE OF
INFORMATION

Friends, family	53%	+4
<u>Opinions in social media</u>	29%	+11
Web forums	13%	+1
Articles on the Internet	35%	-8
Travel literature	21%	-5

RESERVATION METHOD

Own accommodation	20%	+11
Booking.com	45%	-2
Expedia.com	9%	+0
Other web portal	7%	+0
Directly at the accommodation provider	21%	-5

TRAVELLING WITH

<u>Friends</u>	28%	+14
<u>Alone</u>	14%	+7
As a couple	26%	-16
Family	25%	-7
Relatives	7%	+3

CHARACTERISTICS:

Size*	129.882
Share*	2%
Age	31
Women	30%

Spring	9%
Summer	71%
Shorter trips	2
Longer trips	1

BELGIUM: Adventurists (2,9%)



DESTINATION TYPE

<u>Elsewhere in nature</u>	68%	+31
<u>In the mountains</u>	51%	+16
<u>By a lake</u>	37%	+9
<u>Countryside</u>	31%	+9
By the sea	47%	-21

TYPE OF ACCOMMODATION

<u>Camp</u>	39%	+19
<u>Hostel</u>	24%	+8
<u>Camper</u>	16%	+11
<u>Tourist farm</u>	15%	+8
Staying with relatives or friends	22%	+0

TRANSPORT TO THE DESTINATION

<u>Car</u>	56%	+18
<u>Bicycle</u>	3%	+3
Motorhome (camper)	3%	+1
Train	3%	+0
<u>Motorcycle</u>	3%	+2

TRANSPORT AT THE DESTINATION

<u>Motorhome (camper)</u>	13%	+10
Car	71%	-3
Motorcycle	6%	+3
Bicycle	6%	+0
Train	6%	-9

ACTIVITIES

<u>History and castles</u>	58%	+18
<u>Water sports activities</u>	37%	+21
<u>Adrenaline sports challenges</u>	33%	+27
<u>Winter sports</u>	20%	+8
Learning about the local way of life	16%	+1

MOTIVATION

Articles on the Internet	21%	-3
Travel presentations	16%	+2
Web ads	12%	+4
Past experience	31%	-12
Suitability of the destination in all seasons	16%	-5

SOURCE OF INFORMATION

Opinions in social media	24%	+5
Articles in print media	22%	+10
Articles on the Internet	37%	-6
Travel literature	25%	-1
Web forums	17%	+4

RESERVATION METHOD

<u>Expedia.com</u>	19%	+10
Directly at the accommodation provider	27%	+2
Through official TICs	11%	+7
<u>Agoda.com</u>	7%	+3
Booking.com	31%	-16

TRAVELLING WITH

<u>Friends</u>	26%	+11
Family	29%	-3
As a couple	31%	-11
<u>Alone</u>	12%	+5
Relatives	2%	-2

CHARACTERISTICS:

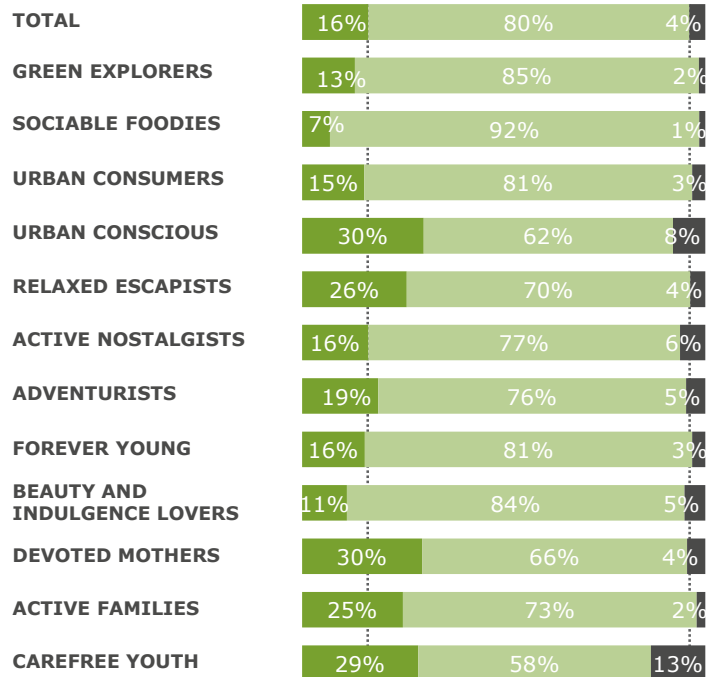
Size*	116.412
Share*	2%
Age	37
Women	24%

Spring	11%
Summer	84%
Shorter trips	3
Longer trips	1

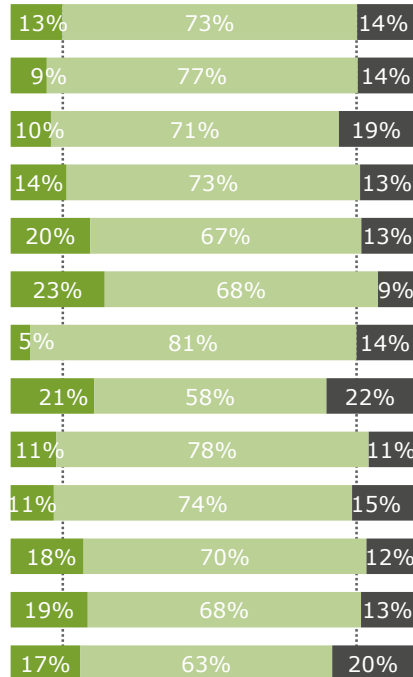
BELGIUM: Price sensitivity



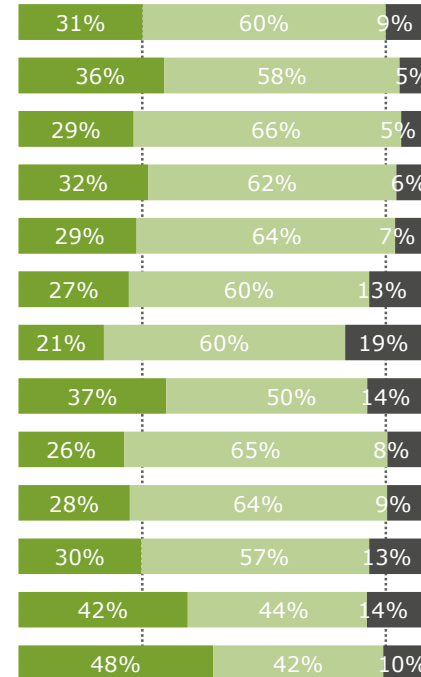
CHOICE OF ACCOMMODATION



CHOICE OF DESTINATION



CHOICE OF TRANSPORT

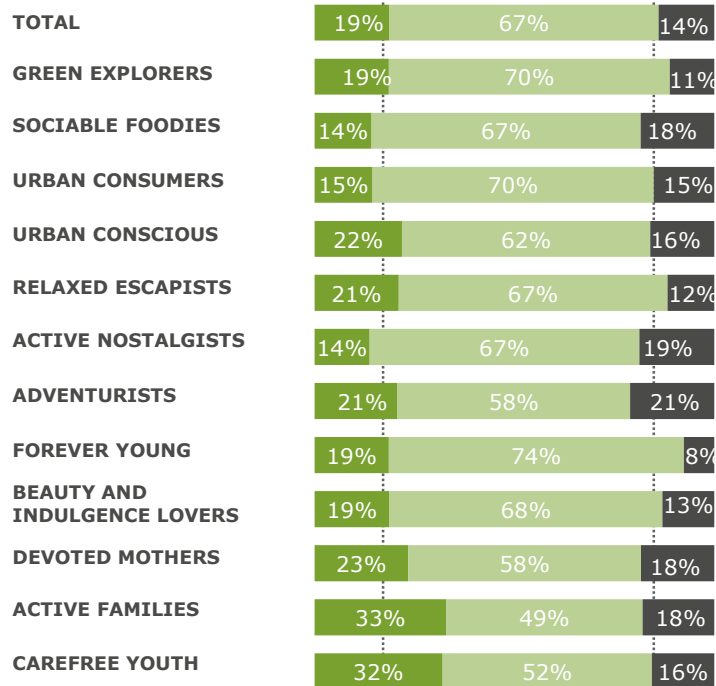


seek the most favourable offer
 assess value for money
 disregard the price

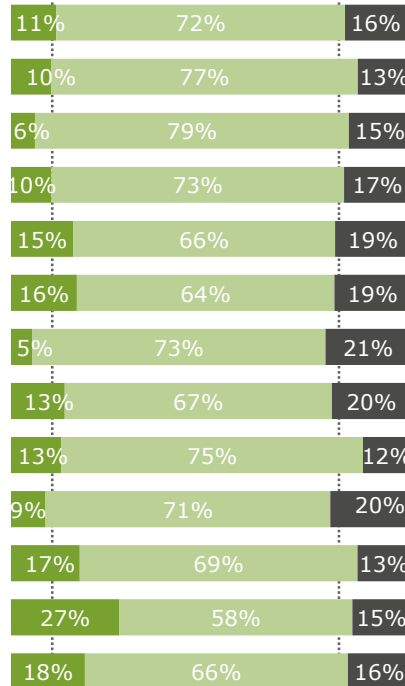
BELGIUM: Price sensitivity



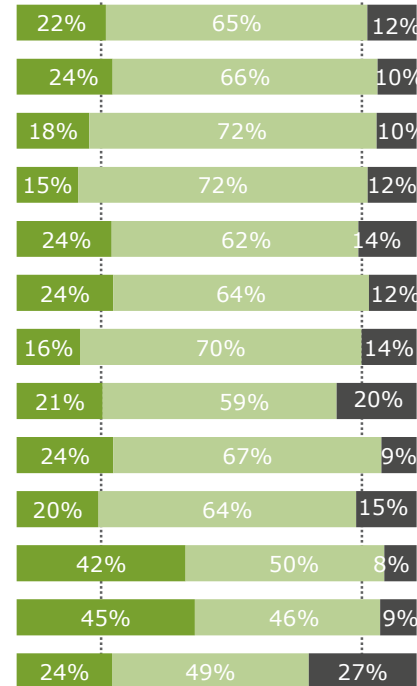
CHOICE OF ADDITIONAL ACTIVITIES



CHOICE OF FOOD



SHOPPING

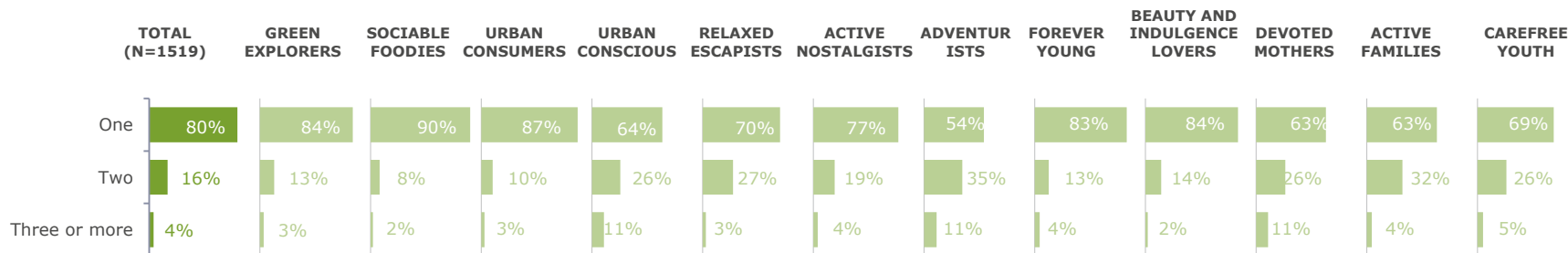


seek the most favourable offer
 assess value for money
 disregard the price

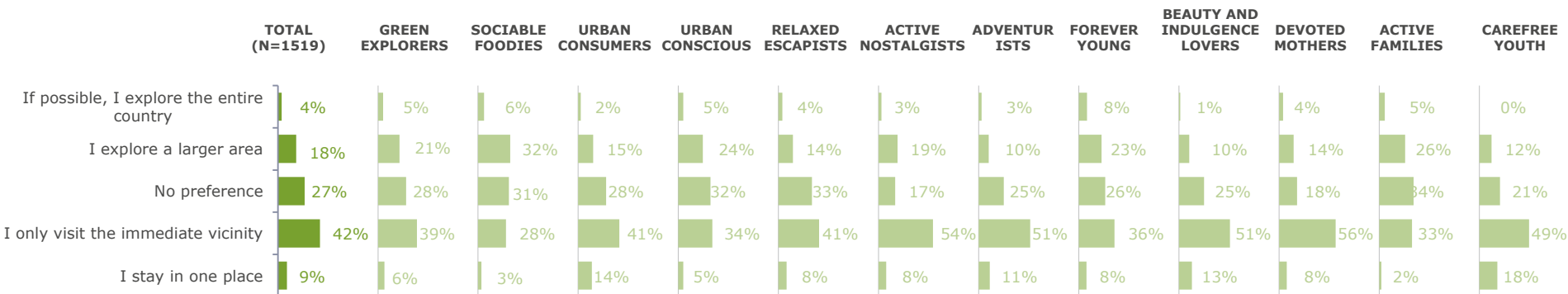
BELGIUM: Level of exploration



Number of countries visited during one trip, break or holiday



Exploring in one country



GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY



BELGIUM: General travel habits and motives



CHARACTERISTICS OF THE TARGET GROUP:

Size*	3.977.733	Spring	20%
Share*	56,2%	Summer	67%
Age	40	Shorter trips	2
Women	49%	Longer trips	1

TRAVELLING WITH:

As a couple	42%
Family	32%
Friends	14%
Alone	7%
Relatives	4%

DESTINATION TYPE:

By the sea	42%	68%
Towns	15%	46%
Elsewhere in nature	9%	37%

3 x

a year
travels
abroad

ACTIVITIES - TOP 10:

Sightseeing of a town, the capital	58%
Sun and sea	58%
Sightseeing of old town centres	56%
Natural parks, attractions	52%
Tourist sights	43%
Shopping	40%
History and castles	40%
Recreation	38%
Sports activities	33%
Gastronomic delights	30%

TRAVEL MOTIVES - TOP 10:

Relaxation	15%	41%
Visit a beautiful destination	11%	35%
Retreat from the everyday	12%	34%
To learn something new	10%	32%
Spend time with partner	9%	28%
Enjoy good food, drinks	3%	24%
Rest, slow down the pace of life	6%	23%
Visit a town, the capital	6%	22%
Spend time with family, strengthen the bonds	7%	20%
Experience another culture	3%	19%

VISITING COUNTRIES- TOP 10:

France	53%	68%
Spain	45%	55%
Belgium	31%	49%
the Netherlands	29%	47%
Italy	37%	45%
Germany	26%	42%
United Kingdom	23%	32%
Greece	23%	29%
Non-European countries	20%	28%
Austria	15%	24%
Slovenia	2%	4%

■ Repeated visit
■ Visit

NOTES:

The results represent the target group: everyone who travels abroad at least once a year for a break or holiday. The data refer to trips to European destinations. / 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 have they visited so far and would visit again (Top 10, compared with Slovenia).

BELGIUM: Elements of the purchase journey and consumption



TYPE OF ACCOMMODATION:



79%



38%



23%

Other frequent accommodation types:

Relatives, friends: 22%

Camp: 20%

Hostel: 16%

RESERVATION:

UP TO **3**
months in
advance

71%

TRANSPORT MODE (%):

AEROPLANE

CAR

TRAIN

CAMPER

COACH



54

-

38

74

3

14

2

4

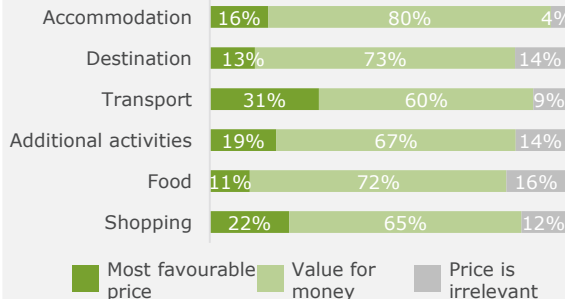
2

25

■ To the destination

■ At the destination (20% ON FOOT, 6% BICYCLE, 4% MOTORCYCLE)

PRICE SENSITIVITY:



PURCHASE JOURNEY:

MOTIVATIONS:

Experience 43%

Price 43%

Recommendations 40%

Proximity 25%

Articles - the Internet 24%

SOURCES OF INFORMATION:

Friends, family 49%

Articles - the Internet 44%

Travel literature 26%

Tourist portals 25%

Agencies 21%

RESERVATION METHOD:

Booking.com 47%

Agency 33%

Accommodation providers 25%

Airbnb 15%

Own accommodation 9%

BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	65 €	69 €
TRANSPORT per person	117 €	123 €

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:

TRAVELLING WITH:

Size*	580.092	Spring	20%
Share*	8,2%	Summer	67%
Age	40	Shorter trips	3
Women	36%	Longer trips	2

As a couple	45%
Family	24%
Friends	15%
Alone	11%
Relatives	6%

DESTINATION TYPE:

By the sea	32%	58%
In the mountains	15%	47%
Towns	14%	42%

5 x

a year
travels
abroad

ACTIVITIES - TOP 10:

Sightseeing of old town centres	59%
Sightseeing of a town, the capital	54%
Natural parks, attractions	52%
Sun and sea	47%
History and castles	41%
Tourist sights	39%
Sports activities	37%
Recreation	34%
Touring	30%
Shopping	28%

TRAVEL MOTIVES - TOP 10:

Visit a beautiful destination	11%	36%
Relaxation	15%	35%
To learn something new	9%	32%
Retreat from the everyday	9%	26%
Spend time with partner	6%	24%
Rest, slow down the pace of life	5%	21%
Enjoy good food, drinks	3%	21%
Visit a town, the capital	5%	20%
Experience another culture	3%	20%
Contact with nature	7%	20%

VISITING COUNTRIES- TOP 10:

France	46%	67%
Spain	46%	61%
Italy	38%	54%
Belgium	27%	50%
Germany	29%	50%
the Netherlands	27%	49%
Austria	24%	40%
Croatia	28%	39%
United Kingdom	21%	38%
Greece	27%	35%
Slovenia	14%	30%

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).

BELGIUM: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia



TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Private accommodation: 24%

Relatives, friends: 22%

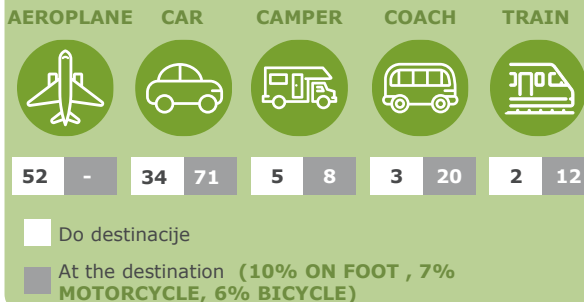
Hostel: 21%

RESERVATION:

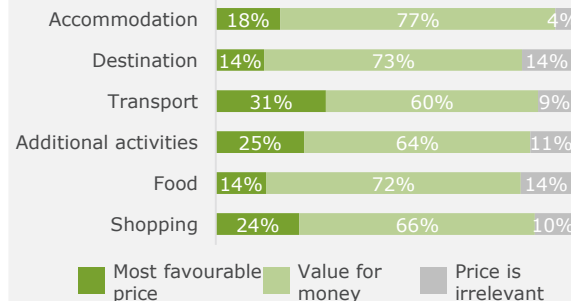
UP TO 3
months in
advance

73%

TRANSPORT MODE (%):

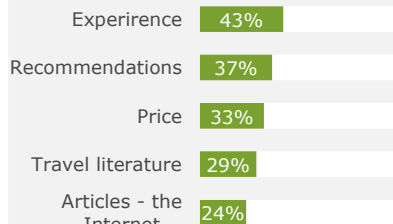


PRICE SENSITIVITY:

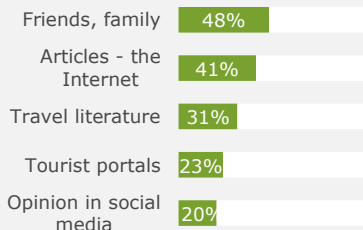


PURCHASE JOURNEY:

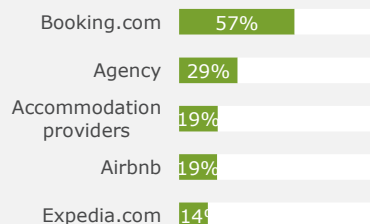
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	69 €	70 €
TRANSPORT per person	131 €	140 €

NOTES:

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



CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size*	175.266	Spring	16%
Share*	2,5%	Summer	71%
Age	38	Shorter trips	3
Women	38%	Longer trips	2

TRAVELLING WITH:

As a couple	44%
Family	31%
Friends	13%
Relatives	6%
Alone	6%

DESTINATION TYPE:

By the sea	36%	65%
In the mountains	18%	53%
Towns	4%	46%

5 x

a year
travels
abroad

ACTIVITIES - TOP 10:

Sightseeing of old town centres	71%
Natural parks, attractions	67%
Sun and sea	64%
Sightseeing of a town, the capital	62%
Tourist sights	56%
Touring	49%
Sports activities	49%
History and castles	43%
Shopping	39%
Recreation	37%

TRAVEL MOTIVES - TOP 10:

To learn something new	12%	44%
Visit a beautiful destination	13%	41%
Spend time with partner	7%	38%
Retreat from the everyday	16%	36%
Relaxation	13%	32%
Rest, slow down the pace of life	3%	28%
Enjoy good food, drinks	4%	22%
Clear one's head, gather thoughts	3%	22%
Contact with nature	5%	21%
Experience another culture	5%	18%

VISITING COUNTRIES- TOP 10:

Slovenia	46%	100%
France	62%	87%
Spain	66%	86%
Germany	44%	80%
the Netherlands	41%	78%
Italy	60%	77%
Belgium	38%	65%
Croatia	43%	61%
United Kingdom	34%	61%
Austria	34%	59%

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).

BELGIUM: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia



TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Private accommodation: 28%

Hostel: 17%

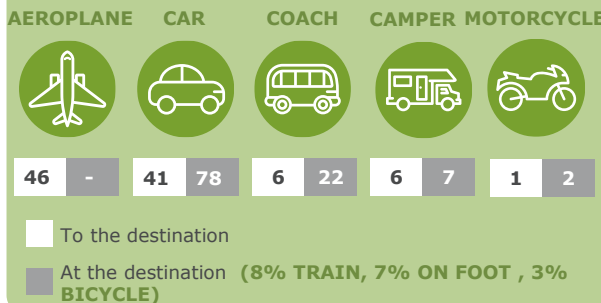
Relatives, friends: 17%

RESERVATION:

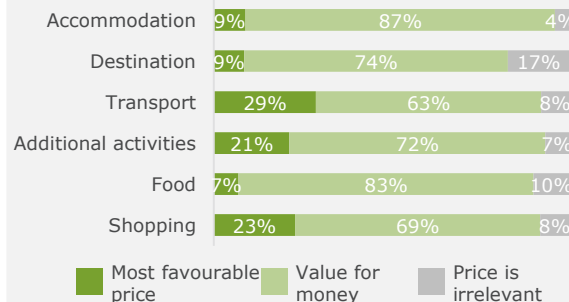


67%

TRANSPORT MODE (%):

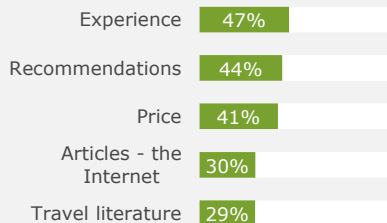


PRICE SENSITIVITY:

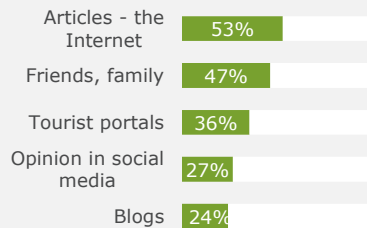


PURCHASE JOURNEY:

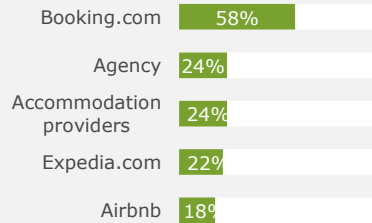
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	55 €	62 €
	in SLO	45 €	46 €
TRANSPORT per person	in Europe	131 €	134 €
	in SLO	103 €	97 €

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



BELGIUM: Destination relevance

Share of visitors by popularity of the destination



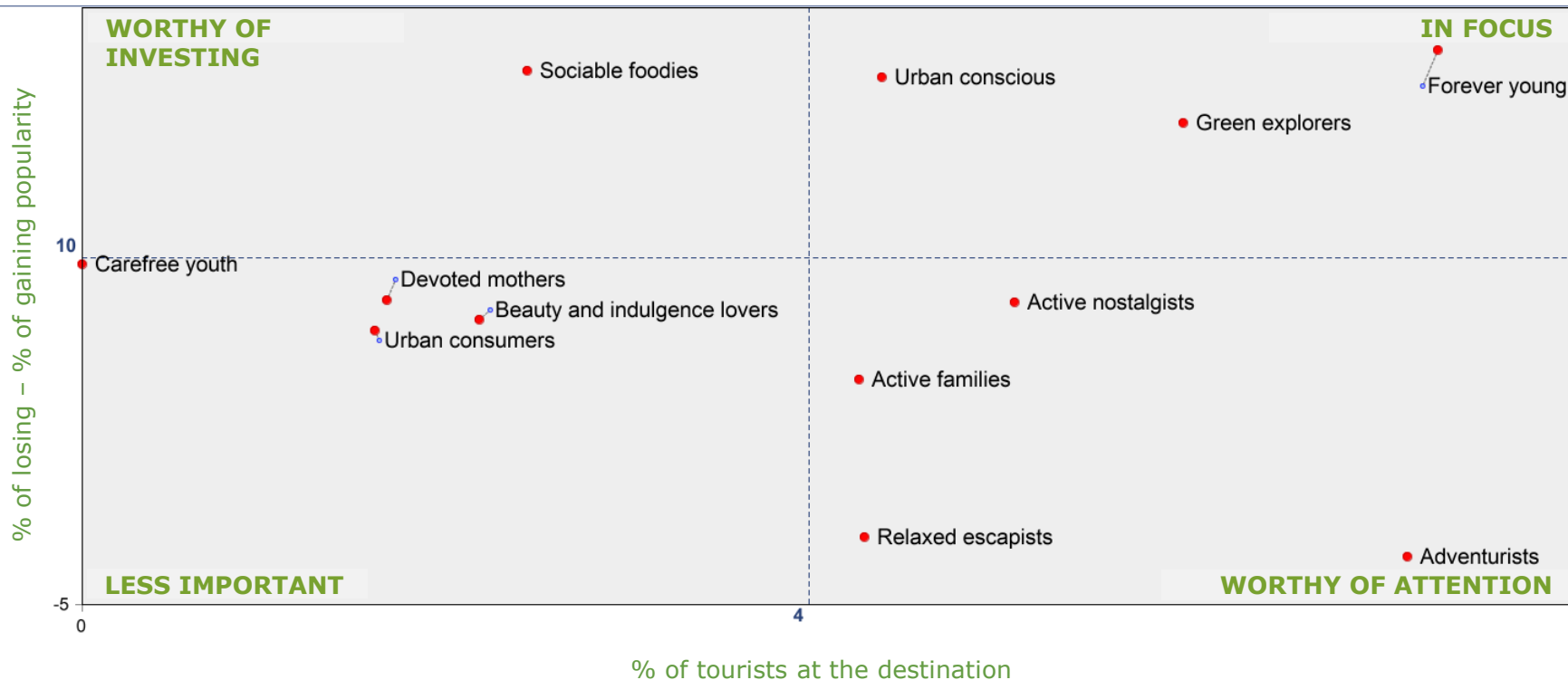
NOTES:

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).

BELGIUM: Slovenia's relevance

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



NOTES:

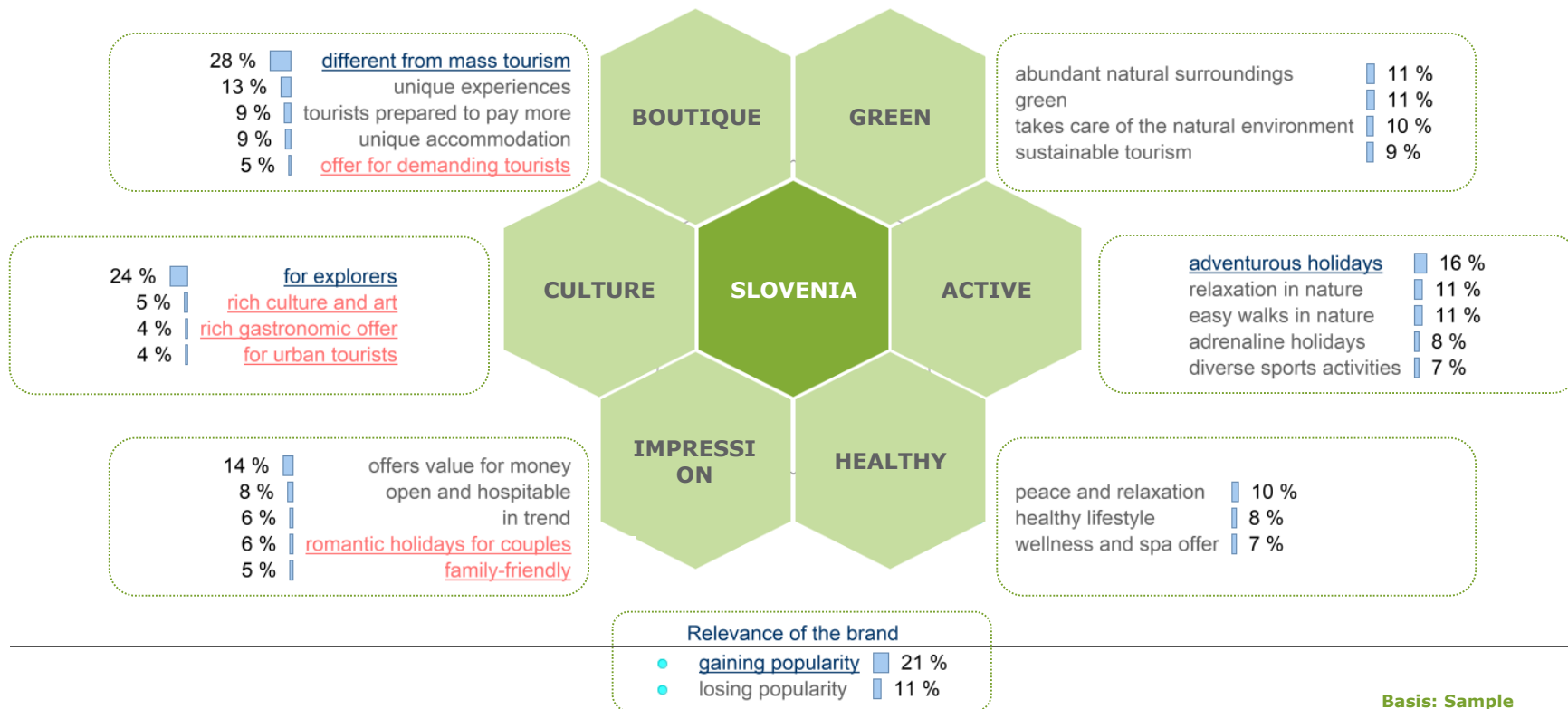
The chart shows the share of visitors according to the ratio of gaining – losing popularity (destination % losing – % gaining).

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).

BELGIUM: Slovenia's image



n=1519



Basis: Sample

NOTES:

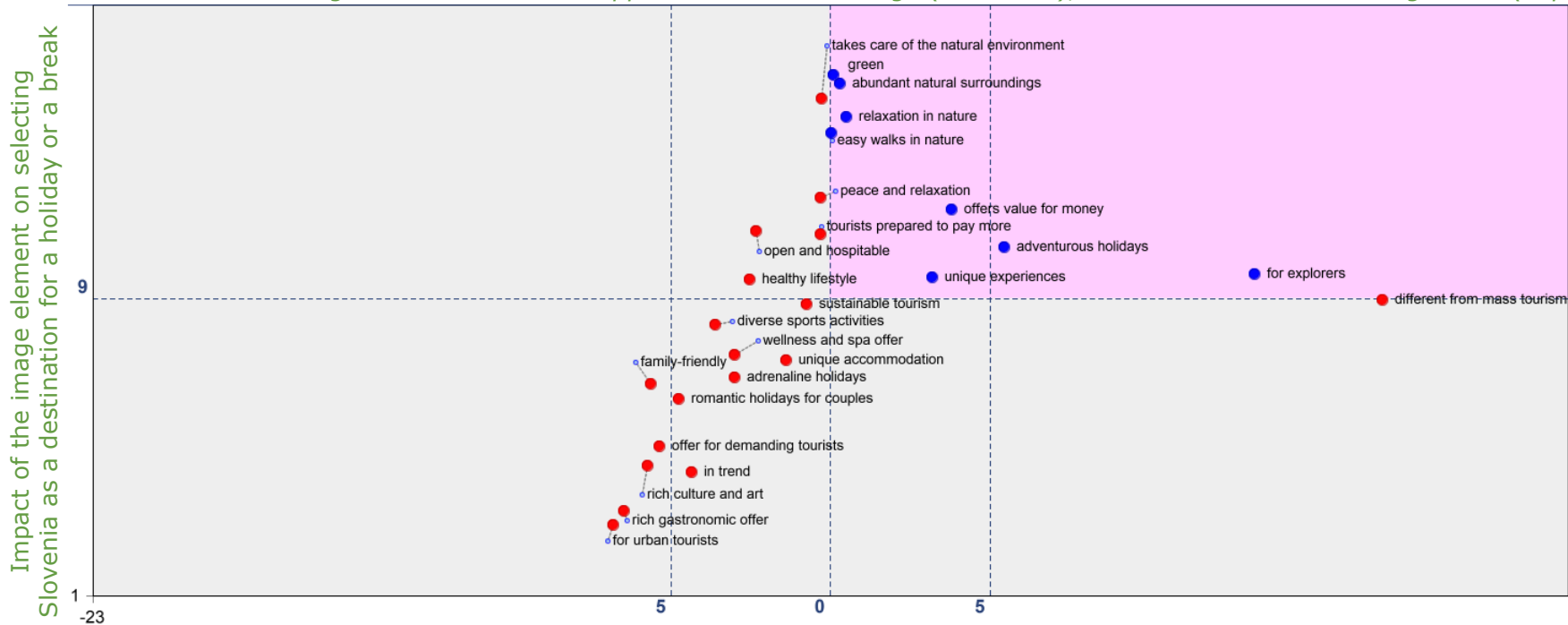
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

BELGIUM: 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)*



Weak association of Slovenia ← → Stronger association of Slovenia

NOTES:

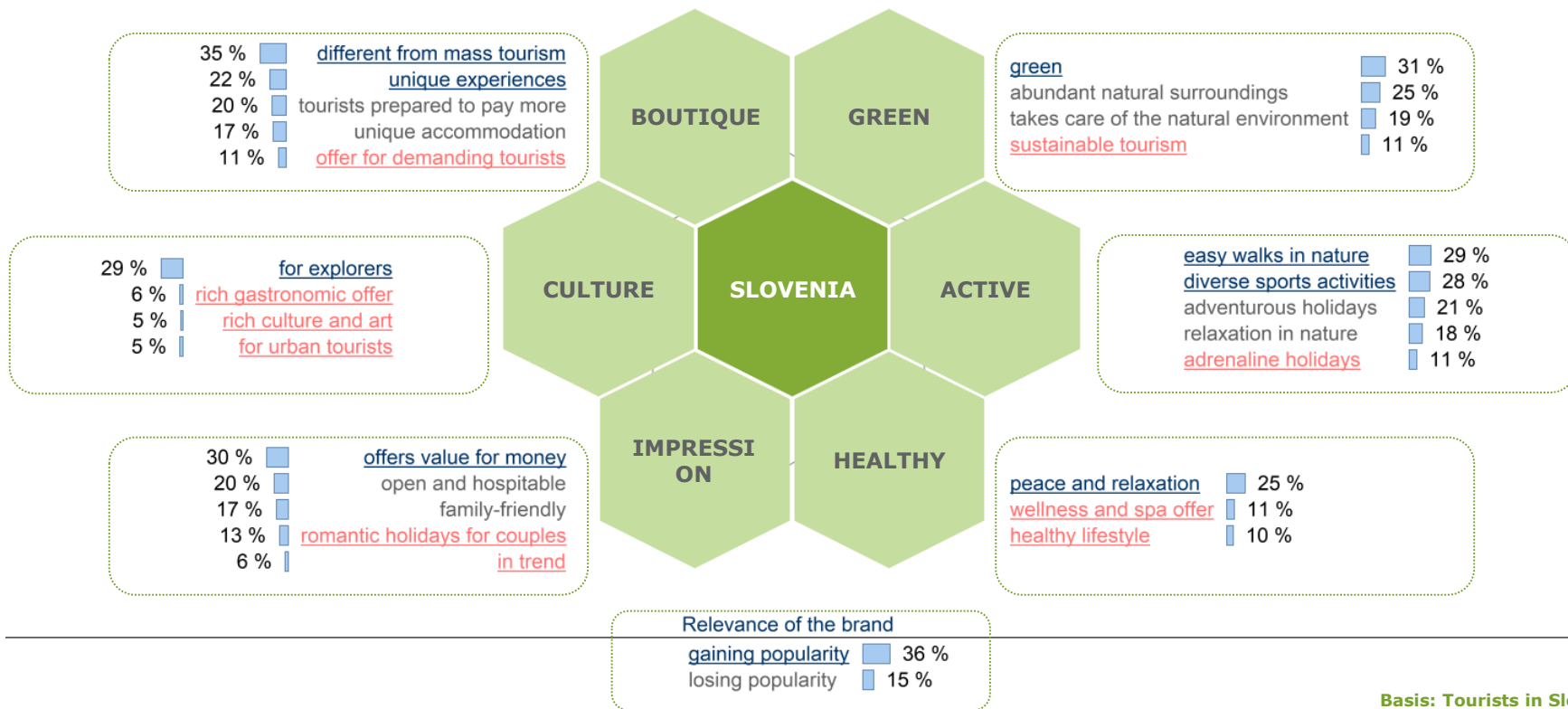
Guidelines for interpretation: elements in the upper right quadrant have a strong impact on the destination's image. These are the elements which influence an individual's decision to spend a holiday at a destination. The upper middle quadrant represents new opportunities.

BELGIUM: Slovenia's image

Subsample: tourists in Slovenia



n=67



Basis: Tourists in Slovenia

NOTES:

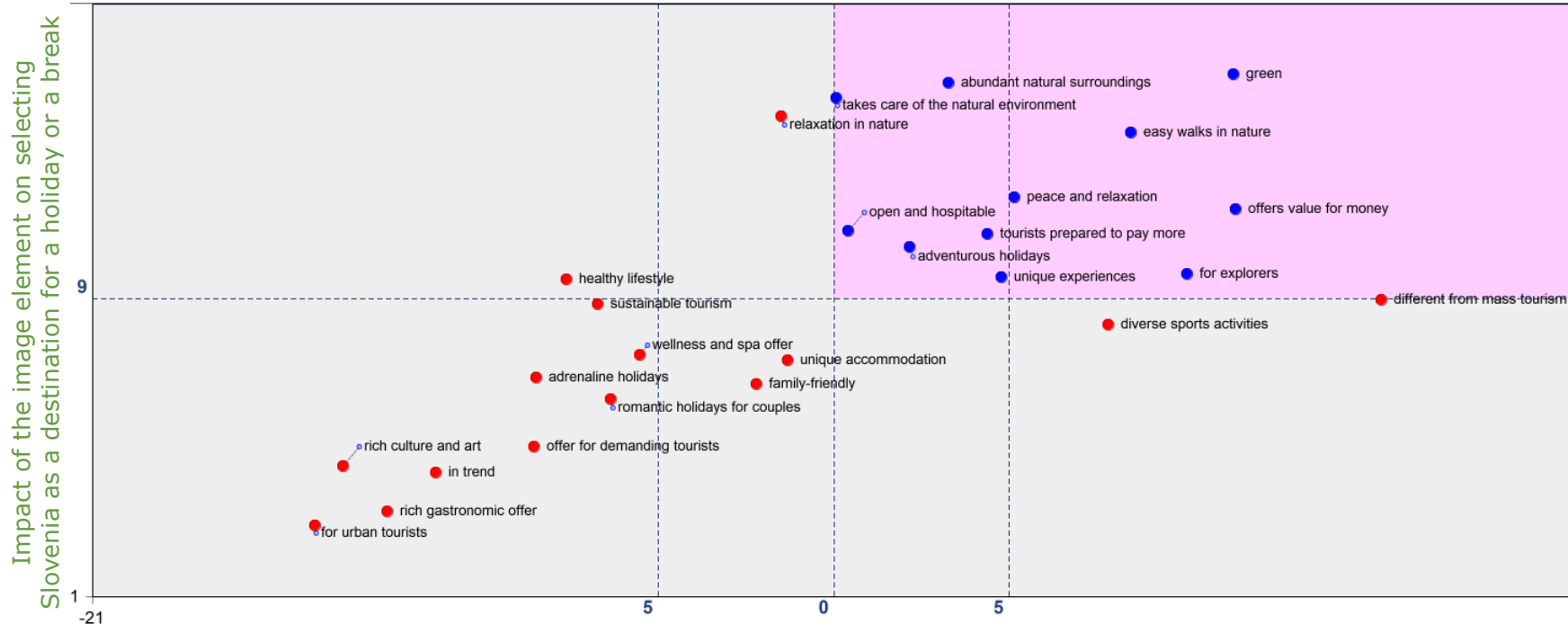
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

BELGIUM: 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.

BELGIUM: 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.

BELGIUM: 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

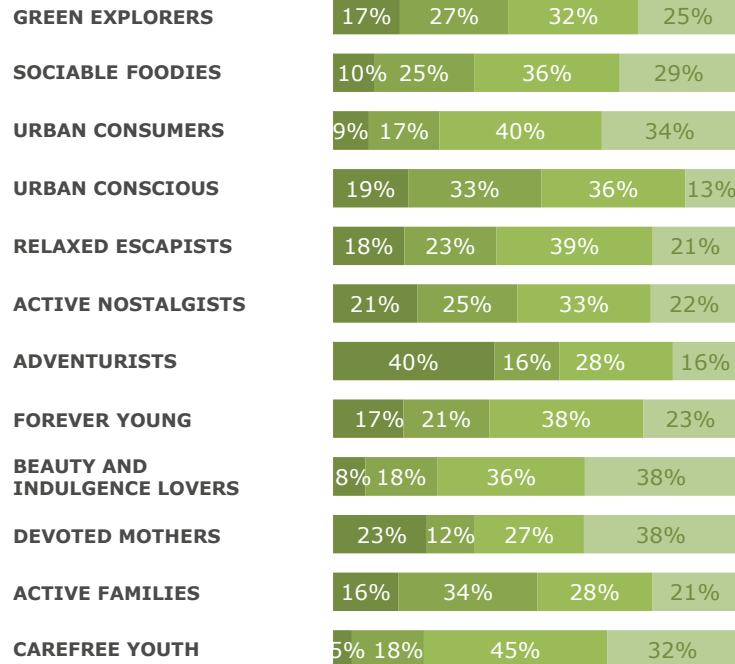


BELGIUM: Knowledge of, and experience with, Slovenia

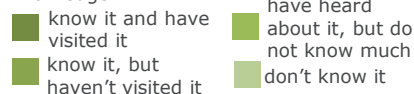


KNOWLEDGE OF SLOVENIA

Basis: sample

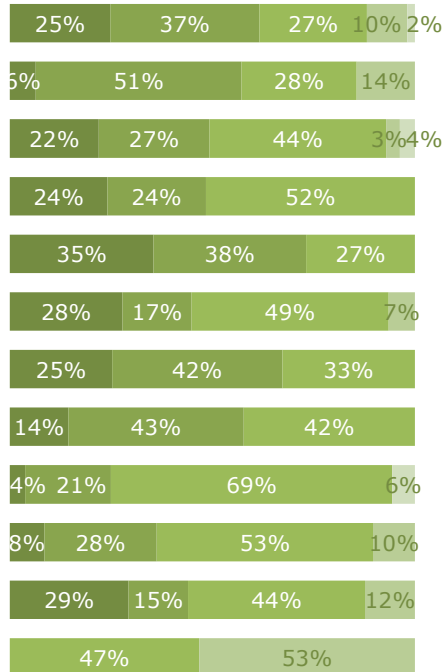


Knowledge:



SATISFACTION

Basis: visitors of Slovenia

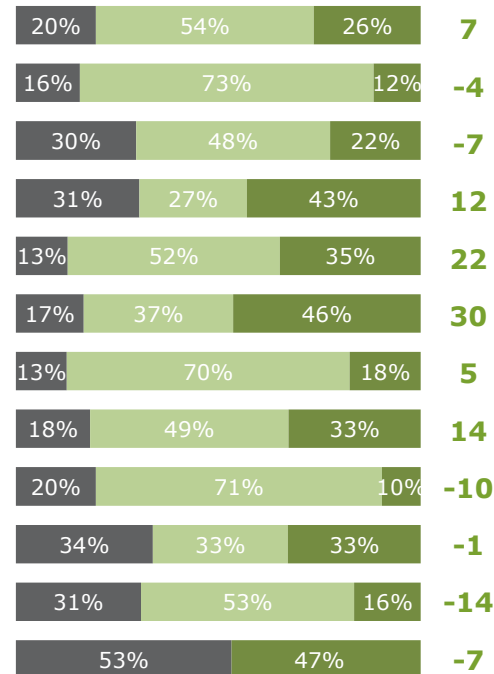


Meeting of expectations:



NPS – DEGREE OF RECOMMENDATION

NPS Index



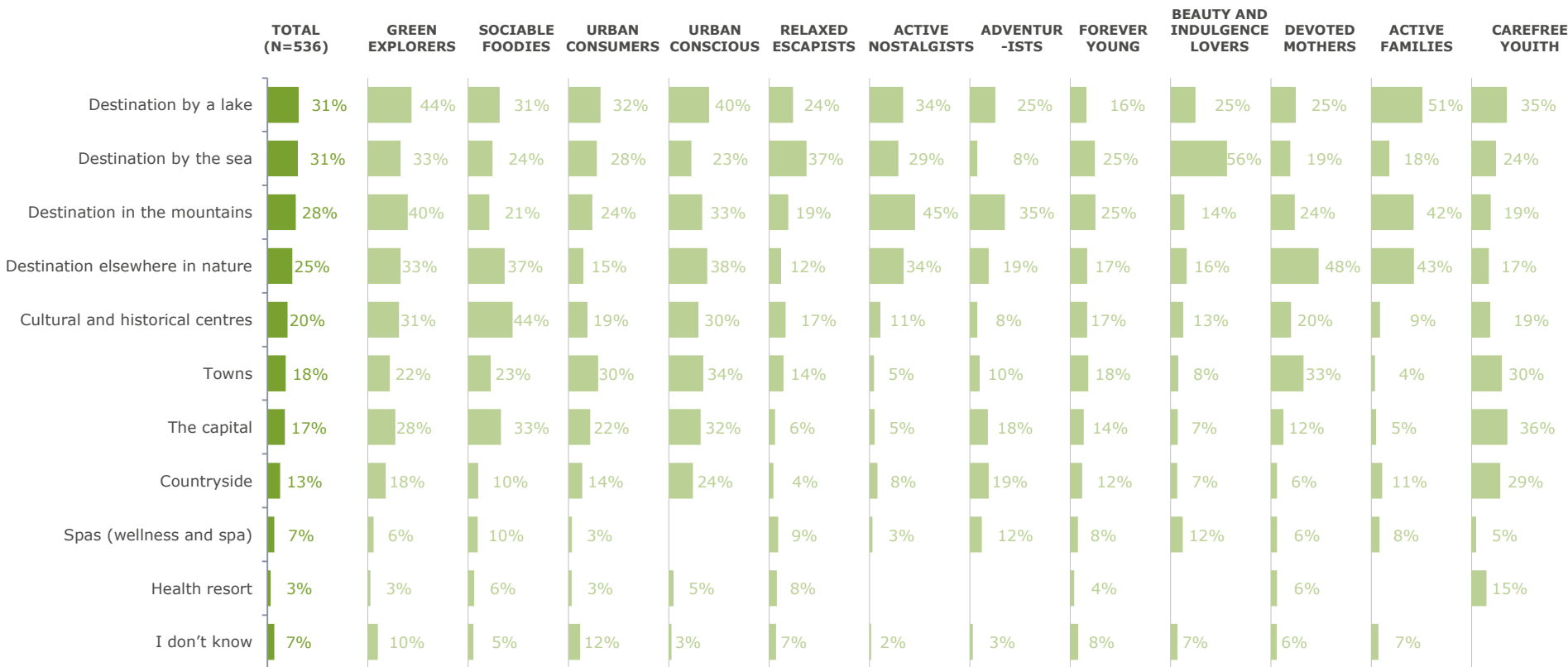
Recommendations:



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.

BELGIUM: Destination type in Slovenia

Subsample: visitors to Slovenia

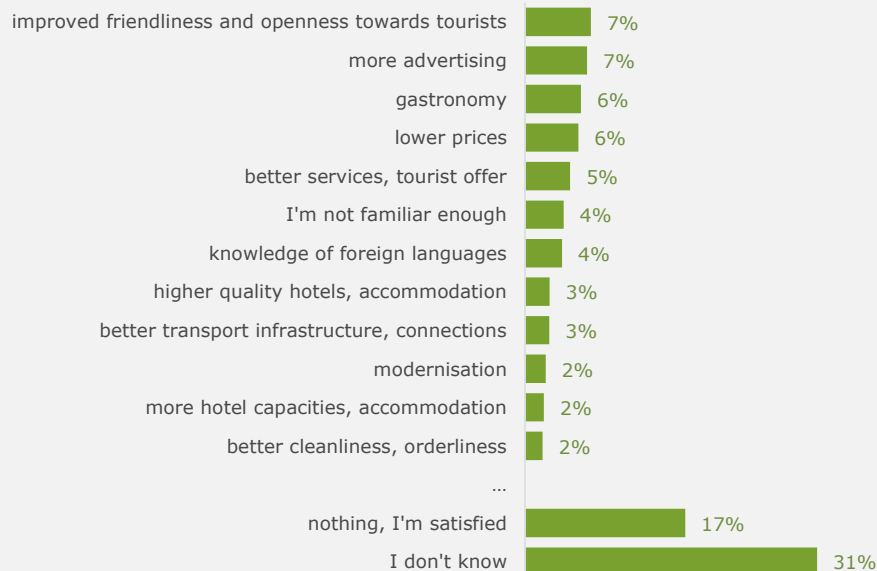


NOTES:

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

Opportunities for improvement – Top 12

Gossipers and neutral (would not recommend Slovenia), n=160

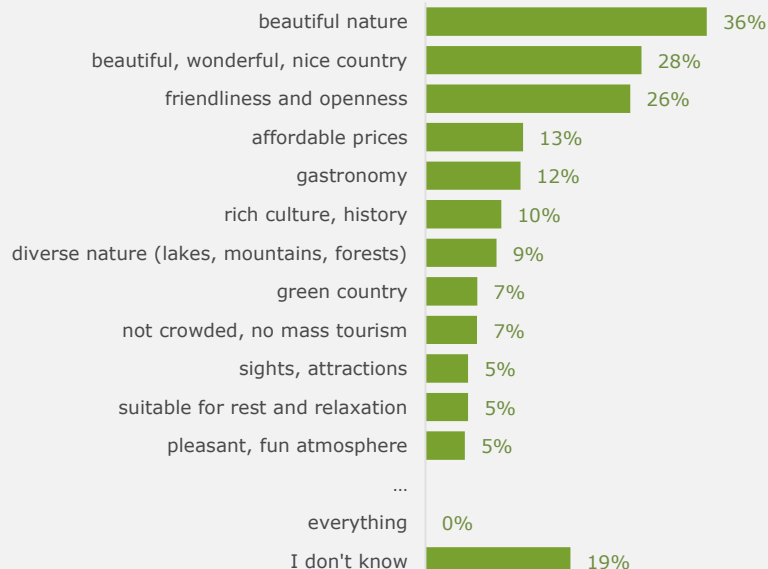


NOTES:

OTHER STATEMENTS: more things happening, fun, nature, landscape, preservation of safety, offer of local goods and own culture, ensure a more pleasant stay, attractiveness, more sports activities, different social and political attitude, more attractions, sights, unattractiveness of the 'sun and sea' product, more information and information points

Elements of excitement – Top 12

Promoters (would recommend Slovenia), n=62

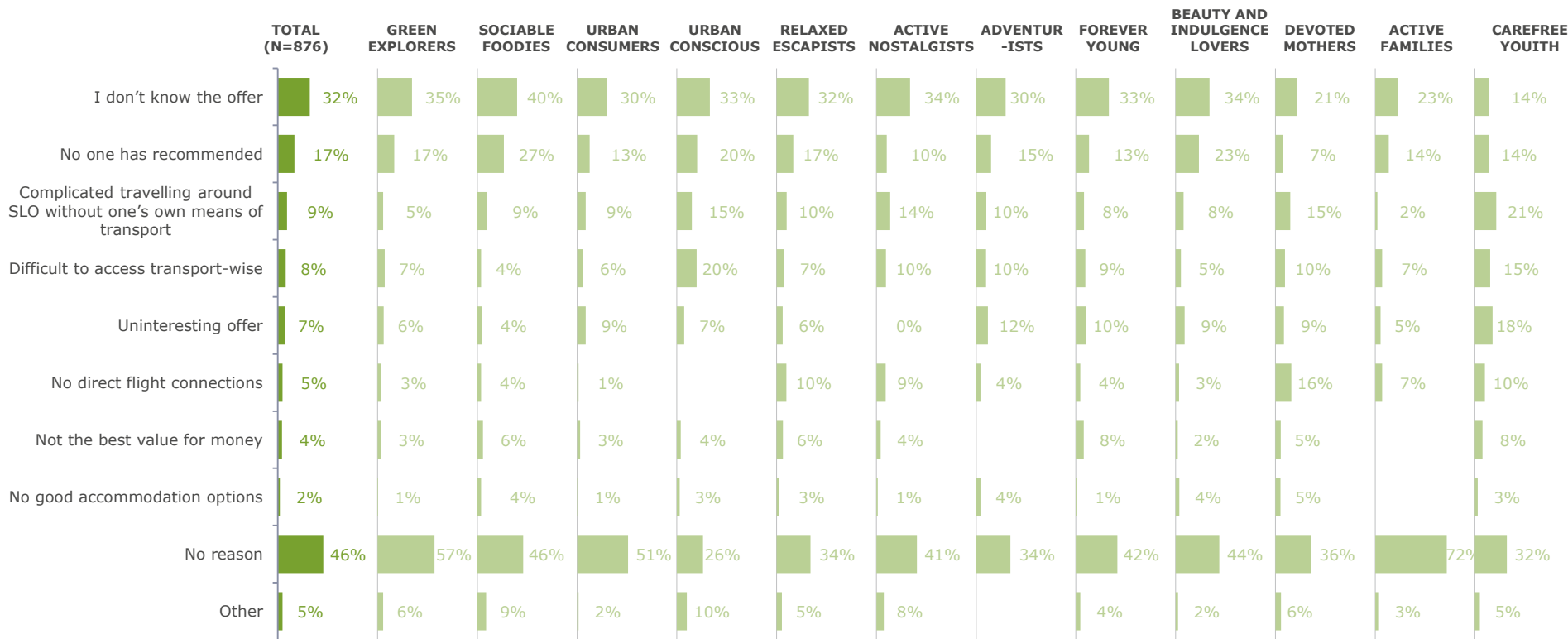


NOTES:

OTHER STATEMENTS: activities, recreation, cleanliness and orderliness, accommodation, good and high-quality services

BELGIUM: 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 2018*:

Country	Total population*	Population aged between 18 and 65*
Belgium	11.351.727	7.075.878
Czech Republic	10.578.820	6.811.816
Denmark	5.748.769	3.549.649
Hungary	9.797.561	6.382.651
Spain	46.528.024	29.823.712
Sweden	9.995.153	6.050.551
Switzerland	8.419.550	5.472.750

When calculating expenditure of tourists, the **currency conversion** on 28 October 2018 was used**:

- **Czech Republic:** 1 CZK= 0.03869 EUR
- **Denmark:** 1 DKK= 0.13404 EUR
- **Hungary:** 1 HUF= 0.00309 EUR
- **Sweden:** 1 SEK= 0.09680 EUR
- **Switzerland:** 1 CHF= 0.87290 EUR

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

**Source: <https://www.ecb.europa.eu>



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

BELGIUM: Green Explorers (17,1%)



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

TIP DESTINACIJE

Cultural	69%	+33
----------	-----	-----

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

TYPE OF ACCOMMODATION

Apartments	60%	+23
------------	-----	-----

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

TRANSPORT TO THE DESTINATION

Aeroplane	56%	+2
-----------	-----	----

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

TRANSPORT AT THE DESTINATION

Coach	29%	+4
-------	-----	----

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

ACTIVITIES

Sightseeing of old town centres	84%	+28
Natural	77%	+26

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

MOTIVATION

Recommendations from friends	52%	+12
Price of	53%	+11

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

INFORMATION

Articles on the Internet	55%	+11
Friends	56%	+7

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

RESERVATION METHOD

Booking.com	55%	+8
Airbnb	20%	+5
Organis	11%	+3

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

TRAVELLING WITH

As a couple	44%	+1
Friends	19%	+5
Family	26%	-6

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

CHARACTERISTICS:

Size*	577.759
Share*	10%
Age	40
Women	53%

Spring	22%
Summer	62%
Shorter trips	3
Longer trips	1

BELGIUM: General travel habits and motives



CHARACTERISTICS OF THE TARGET GROUP:

Size*	3.977.733	20%
Share*	56,2%	67%
Age	40	2
Women	49%	1

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

Longer trips

TRAVELLING WITH:

As a couple	47%
Question: With whom do you usually spend your break, holiday or trip?	
Alone	7%
Relatives	4%

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.

DESTINATION TYPE:

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

Elsewhere in nature	9%	28%	37%
---------------------	----	-----	-----

3 x

a year

Frequency of travelling abroad irrespective of the length

ACTIVITIES - TOP 10:

Sightseeing in a town, the

58%

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

Tourist sights

43%

Shopping

40%

History and castles

40%

Recreation

38%

Sports activities

33%

Gastronomic delights

30%

TRAVEL MOTIVES - TOP 10:

Relaxation

15% 41%

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

9% 28%

Enjoy good food, drinks

3% 24%

Rest, slow down the pace of life

6% 23%

Visit a town, the capital

6% 22%

Spend time with family, strengthen the bonds

7% 20%

Experience another culture

3% 19%

VISITING COUNTRIES- TOP 10:

France

53% 68%

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

23% 32%

Greece

23% 29%

Non-European countries

20% 28%

Austria

15% 24%

Slovenia

2% 4%

Repeated visit
Visit

NOTES:

The results represent the target group: everyone who travels abroad at least once a year for a break or holiday. The data refer to trips to European destinations. / 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).

BELGIUM: 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 (%):

AEROPLAN TRAIN CAMPER COACH



54



To the destination



At the destination (20% ON FOOT, 6% BICYCLE, 4% 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?



2

25

PRICE SENSITIVITY:

Accommodation 16% 80% 4%

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

Food 11% 72% 16%

Shopping 22% 65% 12%

Most favourable price Value for money Price is irrelevant

MOTIVATIONS:

Experience 43%

Friends, family 49%

Booking.com 47%

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)

Internet 24%

Agencies 21%

accommodation 2%

SOURCES OF INFORMATION:

RESERVATION METHOD:

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.

per person

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.



VALICON Ljubljana

Kopitarjeva 2
1000 Ljubljana
T: +386 1 420 49 00
F: +386 1 420 49 60
info@valicon.si

VALICON Zagreb

Baruna Trenka 16
10000 Zagreb
T: +385 1 640 99 55
F: +385 1 640 99 56
info@valicon.hr

VALICON Sarajevo

Branilaca Sarajeva 20
71000 Sarajevo
T: +387 33 258 655
F: +387 33 258 656
info@valicon.ba

VALICON Beograd

Gavrila Principa 16/2
11000 Beograd
T: +381 11 32 86 978
F: +381 11 30 30 444
info@valicon.rs