



IDENTIFICATION OF MARKET POTENTIAL

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

November 2018



Contracting Authority

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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





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



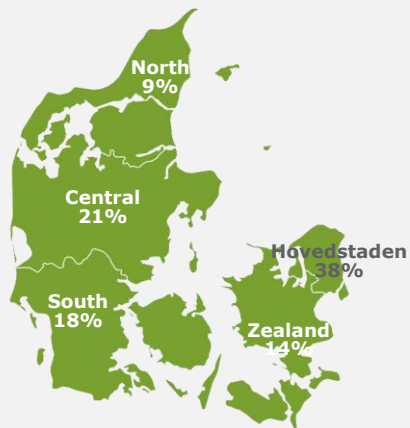
Method of implementation	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
Country of implementation	Denmark
Implementation period	8 October – 17 October 2018
Target group	Citizens of a certain country, who <u>travel 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=3.016; Target group: n=1.518; Visitors to Slovenia: n=244; Tourists in Slovenia: n=53.
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=21:25.



DENMARK: Sample demographics



REGIONS:



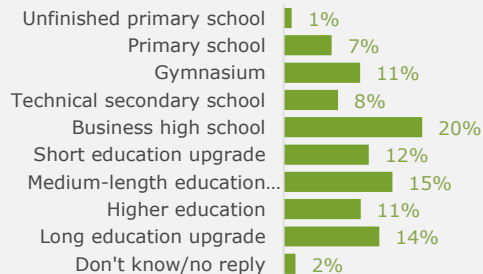
GENDER:



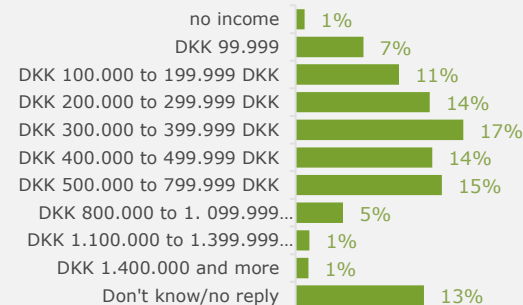
AGE:



EDUCATION:



PERSONAL INCOME:





Sample shares and sizes



Bordered ellipses show the basis for share calculations.



Basis: DENMARK 18-65 years	
POPULATION (18-65 YEARS)	100,0%
TARGET GROUP	51,6%
VISITORS TO SLOVENIA	8,3%
TOURISTS IN SLOVENIA	1,8%

Basis: TARGET GROUP	
POPULATION (18-65 YEARS)	/
TARGET GROUP	100,0%
VISITORS TO SLOVENIA	16,1%
TOURISTS IN SLOVENIA	3,5%

Absolute size*	
	3.549.649
	1.833.308
	295.045
	63.422

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

MARKET STRUCTURE AND SIZE (PERSONAS)



DENMARK: Size of the potential



Top choice

0,1%

3%

**NARROW
POTENTIAL**
Top choice +
repeated visit

2%

35%

**BROAD
POTENTIAL**
Choice

4%

70%

Visit or choice

5%

DEN

n=1518

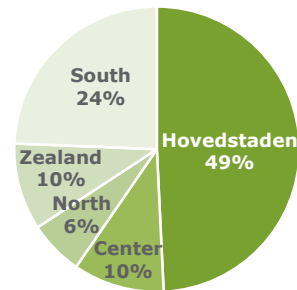
NARROW POTENTIAL:

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:	34.592
Hovedstaden	17.033
Central	3.575
North	2.143
Zealand	3.416
South	8.424

REGIONAL CLASSIFICATION:



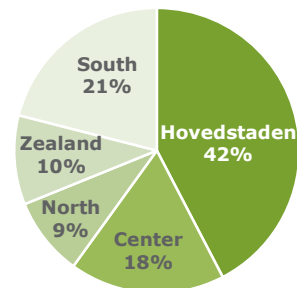
BROAD POTENTIAL:

4%

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:	68.606
Hovedstaden	29.057
Central	12.078
North	6.118
Zealand	6.937
South	14.416

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.

DENMARK: Size of segments by regions



URBAN CONSUMERS:

19,8%

362.330

BEAUTY AND
INDULGENCE LOVERS:

17,0%

311.316



FOREVER YOUNG:

11,4%

208.465

	Total	Hovedstaden	Central	North	Zealand	South
Size (%)	100,0%	37,9%	21,0%	9,1%	13,6%	18,4%
Size	1.833.308	694.590	385.334	167.002	249.699	336.683
GREEN EXPLORERS Size (%)	11,3%	31,1%	22,2%	10,5%	17,9%	18,3%
Size	207.891	64.606	46.096	21.745	37.303	38.141
SOCIABLE FOODIES Size (%)	9,1%	46,3%	18,1%	6,3%	12,6%	16,6%
Size	166.209	77.028	30.085	10.503	20.992	27.601
URBAN CONSUMERS Size (%)	19,8%	39,6%	21,5%	5,9%	14,3%	18,8%
Size	362.330	143.360	77.737	21.269	51.811	68.152
URBAN CONSCIOUS Size (%)	5,4%	40,6%	20,8%	10,8%	9,3%	18,6%
Size	99.207	40.252	20.617	10.703	9.195	18.441
RELAXED ESCAPISTS Size (%)	8,1%	36,1%	27,1%	9,1%	7,5%	20,2%
Size	148.398	53.637	40.181	13.501	11.089	29.990
ACTIVE NOSTALGISTS Size (%)	6,9%	28,8%	17,5%	16,9%	14,1%	22,7%
Size	126.684	36.516	22.154	21.424	17.863	28.728
ADVENTURISTS Size (%)	2,6%	41,2%	24,9%	4,1%	16,2%	13,6%
Size	48.222	19.879	12.003	1.984	7.818	6.538
FOREVER YOUNG Size (%)	11,4%	37,0%	18,1%	12,8%	16,6%	15,4%
Size	208.465	77.195	37.679	26.774	34.660	32.157
BEAUTY AND INDULGENCE LOVERS Size (%)	17,0%	37,6%	21,5%	8,8%	13,4%	18,7%
Size	311.316	117.079	66.907	27.516	41.697	58.117
DEVOTED MOTHERS Size (%)	2,8%	58,5%	8,9%	4,9%	11,6%	16,1%
Size	51.099	29.880	4.562	2.501	5.933	8.223
ACTIVE FAMILIES Size (%)	2,9%	45,9%	15,4%	3,8%	14,9%	20,1%
Size	52.272	23.993	8.035	1.984	7.765	10.495
CAREFREE YOUTH Size (%)	2,8%	21,8%	37,6%	13,9%	7,0%	19,7%
Size	51.214	11.166	19.277	7.098	3.573	10.100

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%
Towns	50%
Capitals	41%
Cultural and historical centres	33%
Elsewhere in nature	28%

TYPES OF ACCOMMODATION

Hotel	84%
Apartment	45%
Staying with relatives or friends	21%
Private accommodation (e.g. Airbnb)	21%
Camp	19%

TRANSPORT TO THE DESTINATION

Aeroplane	75%
Car	19%
Motorhome (camper)	2%
Coach	2%
Motorcycle	1%

TRANSPORT AT THE DESTINATION

Car	67%
Coach	37%
Train	22%
On foot	14%
Motorcycle	4%

ACTIVITIES

Sun and sea	55%
Sightseeing of a town, the capital	50%
Sightseeing of old town centres	50%
Natural sights, nature	47%
Seeing major tourist attractions	41%

MOTIVATION

Travel presentations	47%
Price of the destination	40%
Past experience	38%
Articles on the Internet	22%
Travel literature	20%

SOURCE OF INFORMATION

Friends, family	50%
Travel presentations	42%
Articles on the Internet	39%
Web portals (TripAdvisor etc.)	30%
Agencies	25%

RESERVATION METHOD

Booking.com	38%
Agency	37%
Expedia.com	19%
At the activity provider	15%
Own accommodation	14%

TRAVELLING WITH

Family	41%
As a couple	37%
Friends	14%
Alone	8%
Relatives	1%

CHARACTERISTICS:

Size*	1.833.308
Share*	52%
Age	41
Women	47%

Summer	65%
Autumn	13%
Shorter trips	2
Longer trips	2

DENMARK: Visitors to Slovenia (16,1%)



DESTINATION TYPE

In the mountains	36%	+10
Elsewhere in nature	32%	+4
Towns	46%	-4
By the sea	50%	-8
By a lake	23%	+4

TYPES OF
ACCOMMODATION

Boutique hotel	14%	+5
Private accommodation (e.g. Airbnb)	23%	+2
Tourist farm	10%	+5
Hostel	17%	+2
Hotel	77%	-7

TRANSPORT TO THE
DESTINATION

Motorhome (camper)	5%	+3
Motorcycle	3%	+2
Car	16%	-3
Coach	3%	+1
Aeroplane	71%	-3

TRANSPORT AT THE
DESTINATION

Car	64%	-2
Motorcycle	10%	+5
Motorhome (camper)	9%	+5
Coach	29%	-8
Train	20%	-2

ACTIVITIES

Sports activities	24%	+9
Wellness and spa	26%	+5
Learning about the local way of life	27%	+4
Thermal health spa	16%	+7
Adrenaline sports challenges	15%	+8

MOTIVATION

Travel literature	25%	+5
TV programmes	19%	+11
Articles in print media	22%	+6
Web ads	17%	+6
Travel presentations	43%	-4

SOURCE OF
INFORMATION

Travel literature	29%	+5
Articles on the Internet	41%	+1
Opinions in social media	21%	+6
Blogs	19%	+6
Travel presentations	37%	-5

RESERVATION METHOD

Agoda.com	13%	+7
Expedia.com	25%	+5
Airbnb	19%	+5
Organiser	15%	+6
Booking.com	37%	-1

TRAVELLING WITH

As a couple	38%	+1
Alone	11%	+3
Friends	15%	+1
Family	35%	-5
Relatives	1%	+0

CHARACTERISTICS:

Size*	295.045
Share*	8%
Age	38
Women	32%

Summer	64%
Autumn	14%
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.

DENMARK: Tourists in Slovenia (3,5%)



DESTINATION TYPE

Elsewhere in nature	39%	+11
In the mountains	31%	+4
By the sea	57%	-2
Towns	45%	-5
By a lake	21%	+2

TYPES OF
ACCOMMODATION

<u>Private accommodation</u> (e.g. Airbnb)	46%	+24
Staying with relatives or friends	33%	+12
Hostel	25%	+10
<u>Other</u>	9%	+7
Camp	25%	+7

TRANSPORT TO THE
DESTINATION

Motorhome (camper)	7%	+5
Car	22%	+2
Train	2%	+1
Aeroplane	66%	-9
Coach	2%	+1

TRANSPORT AT THE
DESTINATION

Train	28%	+6
Car	68%	+1
Motorhome (camper)	9%	+5
Motorcycle	7%	+3
Coach	22%	-16

ACTIVITIES

History and castles	55%	+16
Seeing major tourist attractions	55%	+15
Museums, galleries and art	40%	+14
Gastronomy	40%	+13
Sightseeing of old town centres	58%	+8

MOTIVATION

Travel literature	36%	+16
Articles in print media	33%	+17
Travel presentations	52%	+5
Posts on social media, blogs	24%	+11
Web ads	17%	+7

SOURCE OF
INFORMATION

Articles on the Internet	59%	+20
Travel literature	40%	+15
Travel presentations	50%	+8
Articles in print media	22%	+9
Web portals (TripAdvisor etc.)	36%	+6

RESERVATION METHOD

Airbnb	34%	+20
Directly at the accommodation provider	17%	+11
Organiser	18%	+9
Booking.com	36%	-2
Agoda.com	15%	+9

TRAVELLING WITH

Family	49%	+8
Friends	13%	-1
As a couple	32%	-4
Alone	6%	-3

CHARACTERISTICS:

Size*	63.422
Share*	2%
Age	41
Women	33%

Summer	64%
Autumn	18%
Shorter trips	3
Longer trips	2

DENMARK: Urban consumers (19,8%)



DESTINATION TYPE

Towns	73%	+23
Capitals	46%	+5
By the sea	51%	-7
Cultural and historical centres	23%	-10
Countryside	12%	-6

TYPES OF ACCOMMODATION

Hotel	94%	+10
Staying with relatives or friends	22%	+0
Apartment	40%	-5
Own accommodation	10%	-1
Boutique hotel	6%	-3

TRANSPORT TO THE DESTINATION

Aeroplane	77%	+3
Train	1%	+1
Car	17%	-3
Coach	2%	+0
Ship or another vessel	1%	+0

TRANSPORT AT THE DESTINATION

Train	25%	+3
Car	63%	-4
On foot	15%	+1
Coach	31%	-6
Bicycle	3%	-1

ACTIVITIES

Shopping	59%	+21
Sightseeing of a town, the capital	62%	+12
Social events, festivals	31%	+13
Seeing major tourist attractions	47%	+6
Nightlife (bars, clubs)	26%	+15

MOTIVATION

Price of the destination	42%	+2
Popularity of the destination	25%	+5
Past experience	37%	-1
Travel presentations	44%	-2
Posts on social media, blogs	15%	+1

SOURCE OF INFORMATION

Friends, family	54%	+4
Web portals (TripAdvisor etc.)	31%	+0
Opinions in social media	18%	+3
Articles on the Internet	37%	-2
Agencies	24%	-1

RESERVATION METHOD

Booking.com	42%	+4
Expedia.com	23%	+4
At the activity provider	17%	+2
Agency	34%	-2
Through official TICs	7%	+2

TRAVELLING WITH

As a couple	41%	+4
Friends	20%	+7
Family	32%	-9
Alone	6%	-2
Relatives	0%	+0

CHARACTERISTICS:

Size*	362.329
Share*	10%
Age	39
Women	53%

Summer	67%
Autumn	13%
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.

DENMARK: Beauty and indulgence lovers (17,0%)



DESTINATION TYPE

By the sea	88%	+29
Terme (Wellness in Spa)	26%	+17
Capitals	32%	-9
Cultural and historical centres	24%	-9
Towns	32%	-18

TYPES OF ACCOMMODATION

Hotel	90%	+6
Apartment	45%	+0
Staying with relatives or friends	19%	-2
Own accommodation	10%	-1
Private accommodation (e.g. Airbnb)	18%	-3

TRANSPORT TO THE DESTINATION

Aeroplane	87%	+12
Train	1%	+0
Motorhome (camper)	1%	-1
Car	11%	-8
Coach	0%	-2

TRANSPORT AT THE DESTINATION

Car	69%	+3
Coach	40%	+3
On foot	14%	+0
Bicycle	3%	+0
Train	16%	-6

ACTIVITIES

Sun and sea	89%	+34
Shopping	60%	+21
Wellness and spa	42%	+21
Rekreacija	43%	+17
Activities and fun for children	31%	+15

MOTIVATION

Travel presentations	54%	+7
Price of the destination	52%	+12
Popularity of the destination	32%	+12
Suitability of the destination in all seasons	18%	+2
Past experience	37%	-1

SOURCE OF INFORMATION

Friends, family	55%	+5
Web portals (TripAdvisor etc.)	37%	+7
Agencies	36%	+11
Travel presentations	44%	+2
Opinions in social media	15%	+0

RESERVATION METHOD

Agency	48%	+12
Booking.com	38%	+1
Airbnb	14%	+0
Expedia.com	16%	-3
Other web portal	8%	-1

TRAVELLING WITH

Family	60%	+19
As a couple	31%	-5
Alone	5%	-4
Relatives	1%	+0
Friends	4%	-10

CHARACTERISTICS:

Size*	311.316
Share*	9%
Age	42
Women	55%

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

DENMARK: Forever young (11,4%)



DESTINATION TYPE

Cultural and historical centres	29%	-4
Capitals	31%	-10
By the sea	47%	-12
Countryside	11%	-6
Health resorts	1%	-1

TYPES OF ACCOMMODATION

<u>Hotel</u>	<u>92%</u>	<u>+8</u>
Private accommodation (e.g. Airbnb)	23%	+2
Apartment	43%	-2
Staying with relatives or friends	20%	-2
Own accommodation	10%	-1

TRANSPORT TO THE DESTINATION

Aeroplane	75%	+0
Car	20%	+1
<u>Train</u>	<u>2%</u>	<u>+1</u>
Motorhome (camper)	2%	+0
Ship or another vessel	0%	+0

TRANSPORT AT THE DESTINATION

Car	69%	+3
<u>On foot</u>	<u>17%</u>	<u>+3</u>
Coach	38%	+1
Train	24%	+2
Motorcycle	3%	-1

ACTIVITIES

<u>Sightseeing of old town centres</u>	<u>82%</u>	<u>+32</u>
<u>History and castles</u>	<u>68%</u>	<u>+30</u>
<u>Sightseeing of a town, the capital</u>	<u>61%</u>	<u>+10</u>
<u>Seeing major tourist attractions</u>	<u>53%</u>	<u>+12</u>
Touring	36%	+20

MOTIVATION

<u>Travel literature</u>	<u>27%</u>	<u>+7</u>
Past experience	38%	+0
Articles in print media	17%	+1
Travel presentations	42%	-5
<u>Recommendations from friends</u>	<u>13%</u>	<u>+2</u>

SOURCE OF INFORMATION

Articles on the Internet	42%	+3
<u>Travel literature</u>	<u>28%</u>	<u>+3</u>
Friends, family	47%	-3
Travel presentations	42%	+0
Agencies	25%	+0

RESERVATION METHOD

<u>Own accommodation</u>	<u>17%</u>	<u>+3</u>
Agency	35%	-1
At the activity provider	15%	+0
Other web portal	11%	+2
Airbnb	13%	+0

TRAVELLING WITH

<u>As a couple</u>	<u>45%</u>	<u>+8</u>
<u>Alone</u>	<u>12%</u>	<u>+4</u>
Family	32%	-9
Friends	10%	-4
<u>Relatives</u>	<u>1%</u>	<u>+1</u>

CHARACTERISTICS:

Size*	208.465
Share*	6%
Age	45
Women	42%

Summer	65%
Autumn	12%
Shorter trips	2
Longer trips	2

DENMARK: Green explorers (11,3%)



DESTINATION TYPE

Capitals	71%	+30
Cultural and historical centres	63%	+31
In the mountains	56%	+29
By the sea	79%	+20
Towns	69%	+19

TYPES OF ACCOMMODATION

Apartment	65%	+20
Private accommodation (e.g. Airbnb)	26%	+5
Hostel	19%	+5
Kamper	10%	+5
Hotel	83%	-1

TRANSPORT TO THE DESTINATION

Car	21%	+2
Aeroplane	74%	-1
Coach	2%	+0
Ship or another vessel	1%	+1
Motorhome (camper)	2%	+0

TRANSPORT AT THE DESTINATION

Coach	45%	+8
Car	70%	+4
On foot	19%	+6
Train	27%	+4
Bicycle	5%	+1

ACTIVITIES

Natural sights, nature	72%	+25
Sightseeing of a town, the capital	69%	+18
Sightseeing of old town centres	68%	+18
History and castles	43%	+5
Learning about the local way of life	28%	+6

MOTIVATION

Travel presentations	52%	+5
Price of the destination	47%	+7
Past experience	45%	+7
Articles on the Internet	31%	+9
Popularity of the destination	24%	+4

SOURCE OF INFORMATION

Travel presentations	52%	+10
Travel literature	33%	+9
Articles on the Internet	47%	+8
Friends, family	51%	+1
Articles in print media	19%	+6

RESERVATION METHOD

Airbnb	20%	+6
Booking.com	40%	+2
At the activity provider	19%	+5
Expedia.com	20%	+1
Own accommodation	16%	+2

TRAVELLING WITH

Family	42%	+2
As a couple	37%	+0
Alone	9%	+1
Friends	12%	-2

CHARACTERISTICS:

Size*	207.891
Share*	6%
Age	41
Women	46%

Summer	65%
Autumn	13%
Shorter trips	2
Longer trips	2

DENMARK: Sociable foodies (9,1%)



DESTINATION TYPE

Cultural and historical centres	<u>75%</u>	<u>+42</u>
Towns	<u>74%</u>	<u>+24</u>
Capitals	<u>73%</u>	<u>+32</u>
By the sea	<u>74%</u>	<u>+15</u>
Elsewhere in nature	<u>50%</u>	<u>+22</u>

TYPES OF ACCOMMODATION

Hotel	<u>95%</u>	<u>+11</u>
Private accommodation (e.g. Airbnb)	<u>37%</u>	<u>+16</u>
Apartment	<u>53%</u>	<u>+8</u>
Boutique hotel	<u>17%</u>	<u>+8</u>
Camp	<u>24%</u>	<u>+6</u>

TRANSPORT TO THE DESTINATION

Aeroplane	<u>76%</u>	<u>+2</u>
Car	<u>22%</u>	<u>+3</u>
Coach	<u>1%</u>	<u>-1</u>

TRANSPORT AT THE DESTINATION

Car	<u>75%</u>	<u>+8</u>
Train	<u>34%</u>	<u>+12</u>
Coach	<u>46%</u>	<u>+8</u>
Bicycle	<u>7%</u>	<u>+3</u>
On foot	<u>17%</u>	<u>+4</u>

ACTIVITIES

Sightseeing of old town centres	<u>90%</u>	<u>+40</u>
Natural sights, nature	<u>81%</u>	<u>+34</u>
Seeing major tourist attractions	<u>80%</u>	<u>+39</u>
History and castles	<u>80%</u>	<u>+41</u>
Sightseeing of a town, the capital	<u>81%</u>	<u>+30</u>

MOTIVATION

Price of the destination	<u>58%</u>	<u>+18</u>
Travel presentations	<u>61%</u>	<u>+14</u>
Past experience	<u>52%</u>	<u>+14</u>
Suitability of the destination in all seasons	<u>29%</u>	<u>+13</u>
Articles on the Internet	<u>32%</u>	<u>+10</u>

SOURCE OF INFORMATION

Web portals (TripAdvisor etc.)	<u>55%</u>	<u>+25</u>
Travel presentations	<u>55%</u>	<u>+14</u>
Friends, family	<u>58%</u>	<u>+8</u>
Agencies	<u>41%</u>	<u>+16</u>
Articles on the Internet	<u>48%</u>	<u>+8</u>

RESERVATION METHOD

Booking.com	<u>57%</u>	<u>+19</u>
Own accommodation	<u>20%</u>	<u>+6</u>
Other web portal	<u>14%</u>	<u>+6</u>
Agency	<u>37%</u>	<u>+0</u>
Expedia.com	<u>22%</u>	<u>+2</u>

TRAVELLING WITH

Family	<u>51%</u>	<u>+10</u>
As a couple	<u>36%</u>	<u>+0</u>
Friends	<u>8%</u>	<u>-6</u>
Alone	<u>4%</u>	<u>-4</u>

CHARACTERISTICS:

Size*	166.209
Share*	5%
Age	43
Women	49%

Summer	65%
Autumn	12%
Shorter trips	3
Longer trips	2

DENMARK: Relaxed escapists (8,1%)



DESTINATION TYPE

Countryside	18%	+1
Towns	36%	-14
Elsewhere in nature	18%	-11
By the sea	35%	-23
Cultural and historical centres	19%	-14

TYPES OF ACCOMMODATION

Hotel	81%	-2
Own accommodation	11%	+0
Other	5%	+3
Hostel	11%	-3
Private accommodation (e.g. Airbnb)	14%	-7

TRANSPORT TO THE DESTINATION

Car	22%	+2
Motorhome (camper)	3%	+0
Aeroplane	73%	-2
Motorcycle	1%	+0
Coach	2%	+0

TRANSPORT AT THE DESTINATION

Car	67%	+0
Coach	33%	-4
Motorcycle	3%	-1
Motorhome (camper)	3%	+0
Train	12%	-10

ACTIVITIES

Natural sights, nature	54%	+7
Selfness, digital-detox, etc.	18%	+10
Gastronomy	24%	-3
Sightseeing of a town, the capital	41%	-9
Thermal health spa	10%	+1

MOTIVATION

Articles on the Internet	19%	-2
Suitability of the destination in all seasons	15%	-1
Recommendations from friends	10%	+0
Articles in print media	14%	-1
Travel presentations	37%	-10

SOURCE OF INFORMATION

Articles on the Internet	38%	-1
Friends, family	41%	-9
Travel presentations	33%	-8
Opinions in social media	12%	-3
Web forums	8%	-4

RESERVATION METHOD

Agency	39%	+3
Own accommodation	15%	+0
Expedia.com	18%	-2
Agoda.com	6%	+1
Booking.com	30%	-7

TRAVELLING WITH

Family	42%	+2
Friends	18%	+4
Relatives	2%	+1
As a couple	30%	-6
Alone	8%	-1

CHARACTERISTICS:

Size*	148.398
Share*	4%
Age	40
Women	47%

Summer	68%
Autumn	15%
Shorter trips	2
Longer trips	2

DENMARK: Active nostalgists (6,9%)



DESTINATION TYPE

<u>Elsewhere in nature</u>	60%	+32
<u>In the mountains</u>	59%	+33
<u>By a lake</u>	49%	+29
<u>Countryside</u>	28%	+11
By the sea	45%	-13

TYPES OF
ACCOMMODATION

<u>Camp</u>	39%	+20
<u>Boutique hotel</u>	25%	+16
Hotel	80%	-4
<u>Kamper</u>	15%	+10
Staying with relatives or friends	18%	-3

TRANSPORT TO THE
DESTINATION

<u>Motorhome (camper)</u>	7%	+5
<u>Car</u>	25%	+6
<u>Motorcycle</u>	2%	+2
Aeroplane	63%	-11
Coach	1%	-1

TRANSPORT AT THE
DESTINATION

<u>Car</u>	72%	+6
<u>Motorhome (camper)</u>	15%	+12
<u>Motorcycle</u>	10%	+5
Coach	23%	-14
Train	12%	-10

ACTIVITIES

<u>Visit to a wine cellar</u>	36%	+22
<u>Sports activities</u>	32%	+17
Natural sights, nature	49%	+2
Gastronomy	30%	+3
<u>Winter sports</u>	16%	+6

MOTIVATION

<u>Recommendations from friends</u>	17%	+6
<u>Articles in print media</u>	19%	+4
Articles on the Internet	21%	-1
Travel presentations	39%	-8
Past experience	33%	-5

SOURCE OF
INFORMATION

<u>Articles in print media</u>	18%	+5
Travel literature	28%	+3
Articles on the Internet	35%	-4
<u>Blogs</u>	16%	+4
Friends, family	39%	-11

RESERVATION METHOD

<u>At the activity provider</u>	23%	+9
<u>Organiser</u>	21%	+11
<u>Own accommodation</u>	22%	+8
<u>Agoda.com</u>	13%	+7
Agency	32%	-5

TRAVELLING WITH

<u>As a couple</u>	56%	+19
Alone	10%	+2
Family	24%	-17
Friends	11%	-3

CHARACTERISTICS:

Size*	126.684
Share*	4%
Age	40
Women	30%

Summer	61%
Autumn	15%
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.

DENMARK: Urban conscious (5,4%)



DESTINATION TYPE

Towns	73%	+23
Capitals	66%	+25
Cultural and historical centres	51%	+18
Elsewhere in nature	24%	-4
Countryside	18%	+1

TYPES OF
ACCOMMODATION

Hostel	40%	+25
Staying with relatives or friends	40%	+19
Private accommodation (e.g. Airbnb)	33%	+12
Hotel	81%	-3
Apartment	43%	-2

TRANSPORT TO THE
DESTINATION

Aeroplane	75%	+0
Car	19%	+0
Coach	5%	+3
Motorhome (camper)	1%	-1

TRANSPORT AT THE
DESTINATION

Coach	49%	+12
Train	42%	+20
On foot	21%	+7
Car	47%	-20
Motorhome (camper)	6%	+3

ACTIVITIES

Museums, galleries and art	70%	+44
Learning about the local way of life	65%	+43
Sightseeing of old town centres	82%	+32
Social events, festivals	55%	+37
Music festivals and concerts	51%	+36

MOTIVATION

Past experience	46%	+8
Travel literature	34%	+14
Posts on social media, blogs	29%	+16
Travel presentations	51%	+4
Proximity of the destination	22%	+7

SOURCE OF
INFORMATION

Articles on the Internet	53%	+14
Travel literature	40%	+15
Blogs	23%	+11
Friends, family	58%	+8
Travel presentations	51%	+9

RESERVATION METHOD

Airbnb	23%	+9
Booking.com	45%	+7
Other web portal	14%	+6
Own accommodation	17%	+2
Expedia.com	18%	-1

TRAVELLING WITH

Family	34%	-7
Friends	22%	+8
Alone	19%	+11
As a couple	25%	-12

CHARACTERISTICS:

Size*	99.207
Share*	3%
Age	40
Women	55%

Summer	56%
Autumn	18%
Shorter trips	3
Longer trips	2

DENMARK: Active families (2,9%)



DESTINATION TYPE

<u>Elsewhere in nature</u>	67%	+39
<u>In the mountains</u>	55%	+28
<u>By a lake</u>	35%	+16
By the sea	54%	-5
<u>Countryside</u>	29%	+12

TYPES OF
ACCOMMODATION

<u>Apartment</u>	81%	+36
<u>Hostel</u>	29%	+14
<u>Private accommodation (e.g. Airbnb)</u>	34%	+13
<u>Camp</u>	32%	+13
<u>Boutique hotel</u>	20%	+11

TRANSPORT TO THE
DESTINATION

Car	25%	+5
<u>Train</u>	3%	+2
Coach	4%	+2
Aeroplane	67%	-8
Motorhome (camper)	2%	+0

TRANSPORT AT THE
DESTINATION

Car	71%	+5
<u>Motorhome (camper)</u>	10%	+7
Coach	35%	-2
<u>Motorcycle</u>	9%	+5
Train	17%	-5

ACTIVITIES

Sports activities	49%	+33
<u>Mountaineering (more challenging tours)</u>	37%	+31
<u>Water sports activities</u>	37%	+28
<u>Winter sports</u>	27%	+17
<u>Touring</u>	27%	+11

MOTIVATION

Travel literature	34%	+14
<u>Articles in print media</u>	29%	+13
<u>TV programmes</u>	25%	+17
<u>Videos on the Internet</u>	24%	+12
Travel presentations	40%	-7

SOURCE OF
INFORMATION

<u>Travel literature</u>	38%	+13
<u>Web forums</u>	24%	+12
Articles on the Internet	42%	+3
<u>Blogs</u>	22%	+10
Friends, family	41%	-9

RESERVATION METHOD

<u>Airbnb</u>	30%	+17
<u>Organiser</u>	20%	+10
Expedia.com	23%	+3
Agency	31%	-5
Directly at the accommodation provider	10%	+4

TRAVELLING WITH

As a couple	41%	+4
Family	41%	+0
Friends	12%	-2
Alone	6%	-2

CHARACTERISTICS:

Size*	52.272
Share*	1%
Age	36
Women	31%

Summer	75%
Autumn	3%
Shorter trips	3
Longer trips	2

DENMARK: Devoted mothers (2,8%)



DESTINATION TYPE

By a lake	46%	+27
Towns	44%	-6
In the mountains	36%	+9
Countryside	29%	+12
By the sea	23%	-35

TYPES OF
ACCOMMODATION

Apartment	57%	+12
Tourist farm	22%	+17
Hostel	21%	+7
Glamping	16%	+13
Camp	17%	-2

TRANSPORT TO THE
DESTINATION

Car	31%	+12
Motorcycle	7%	+6
Motorhome (camper)	4%	+2
Aeroplane	58%	-16

TRANSPORT AT THE
DESTINATION

Motorcycle	17%	+12
Car	60%	-7
Coach	31%	-6
Bicycle	3%	-1
Motorhome (camper)	3%	-1

ACTIVITIES

Activities and fun for children	44%	+28
Learning about the local way of life	27%	+5
Sports activities	22%	+7
Selfness, digital-detox, etc.	20%	+11
Adrenaline sports challenges	14%	+7

MOTIVATION

Videos on the Internet	21%	+9
Travel literature	24%	+4
Past experience	31%	-7
Proximity of the destination	11%	-3
Web ads	9%	-1

SOURCE OF
INFORMATION

Opinions in social media	19%	+4
Travel literature	24%	-1
Friends, family	38%	-12
Articles in print media	15%	+2
Travel presentations	30%	-12

RESERVATION METHOD

Own accommodation	30%	+15
Agoda.com	17%	+11
Expedia.com	20%	+1
At the activity provider	19%	+5
Other web portal	9%	+1

TRAVELLING WITH

Family	49%	+9
Friends	18%	+4
Alone	15%	+6
As a couple	18%	-19

CHARACTERISTICS:

Size*	51.099
Share*	1%
Age	39
Women	25%

Summer	67%
Autumn	13%
Shorter trips	2
Longer trips	2

DENMARK: Carefree youth (2,8%)



DESTINATION TYPE

<u>By the sea</u>	70%	+11
<u>Towns</u>	61%	+12
<u>Countryside</u>	25%	+8
Capitals	31%	-10
In the mountains	22%	-4

TYPES OF
ACCOMMODATION

<u>Hostel</u>	45%	+30
<u>Camp</u>	27%	+8
<u>Tourist farm</u>	18%	+13
Own accommodation	19%	+8
Staying with relatives or friends	21%	+0

TRANSPORT TO THE
DESTINATION

<u>Motorhome (camper)</u>	16%	+14
<u>Coach</u>	6%	+4
<u>Ship or another vessel</u>	5%	+5
Aeroplane	56%	-18
Car	14%	-5

TRANSPORT AT THE
DESTINATION

<u>Motorcycle</u>	11%	+7
Coach	36%	-1
Car	46%	-20
On foot	14%	+1
<u>Motorhome (camper)</u>	9%	+5

ACTIVITIES

<u>Music festivals and concerts</u>	48%	+33
<u>Nightlife (bars, clubs)</u>	30%	+19
<u>Social events, festivals</u>	31%	+13
<u>Winter sports</u>	24%	+13
<u>Adrenaline sports challenges</u>	20%	+12

MOTIVATION

<u>Videos on the Internet</u>	23%	+11
<u>Articles in print media</u>	23%	+8
<u>Web ads</u>	20%	+10
Travel presentations	39%	-8
Price of the destination	30%	-10

SOURCE OF
INFORMATION

<u>Articles in print media</u>	24%	+11
Travel presentations	35%	-7
<u>Blogs</u>	22%	+9
Friends, family	41%	-10
Travel literature	20%	-5

RESERVATION METHOD

<u>Expedia.com</u>	36%	+17
<u>Agency</u>	47%	+11
<u>Agoda.com</u>	14%	+8
Through official TICs	14%	+9
Directly at the accommodation provider	12%	+5

TRAVELLING WITH

<u>Friends</u>	32%	+19
<u>Alone</u>	18%	+9
Family	27%	-14
As a couple	23%	-14

CHARACTERISTICS:

Size*	51.214
Share*	1%
Age	32
Women	31%

Summer	53%
Autumn	14%
Shorter trips	3
Longer trips	2

DENMARK: Adventurists (2,6%)



DESTINATION TYPE

<u>In the mountains</u>	70%	+43
<u>Elsewhere in nature</u>	59%	+31
<u>By a lake</u>	48%	+29
<u>Countryside</u>	32%	+15
By the sea	44%	-14

TYPES OF ACCOMMODATION

<u>Hostel</u>	27%	+13
<u>Camp</u>	26%	+8
<u>Tourist farm</u>	20%	+14
Staying with relatives or friends	26%	+5
Hotel	58%	-26

TRANSPORT TO THE DESTINATION

<u>Coach</u>	12%	+10
<u>Car</u>	30%	+10
<u>Motorcycle</u>	3%	+3
Aeroplane	55%	-19

TRANSPORT AT THE DESTINATION

<u>Motorcycle</u>	30%	+26
Car	67%	+1
Bicycle	6%	+3
Coach	30%	-7
Motorhome (camper)	6%	+2

ACTIVITIES

<u>History and castles</u>	70%	+32
<u>Adrenaline sports challenges</u>	46%	+38
<u>Mountaineering (more challenging tours)</u>	42%	+36
<u>Water sports activities</u>	36%	+27
<u>Sports activities</u>	34%	+19

MOTIVATION

<u>Past experience</u>	49%	+11
<u>Recommendations from friends</u>	23%	+12
Travel presentations	43%	-3
Articles on the Internet	19%	-2
Travel literature	18%	-2

SOURCE OF INFORMATION

Travel literature	29%	+4
Travel presentations	41%	-1
Friends, family	42%	-8
Articles on the Internet	38%	-1
Web forums	13%	+0

RESERVATION METHOD

<u>Agency</u>	44%	+8
<u>Airbnb</u>	22%	+8
<u>Organiser</u>	15%	+6
Booking.com	39%	+1
Through official TICs	8%	+3

TRAVELLING WITH

Family	37%	-3
<u>Friends</u>	33%	+19
As a couple	23%	-13
Alone	6%	-2

CHARACTERISTICS:

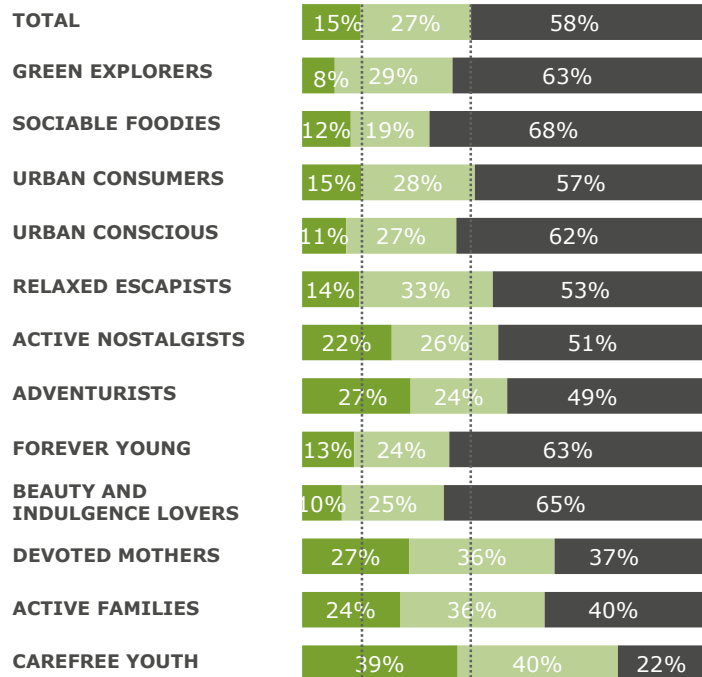
Size*	48.222
Share*	1%
Age	34
Women	40%

Summer	82%
Autumn	2%
Shorter trips	2
Longer trips	2

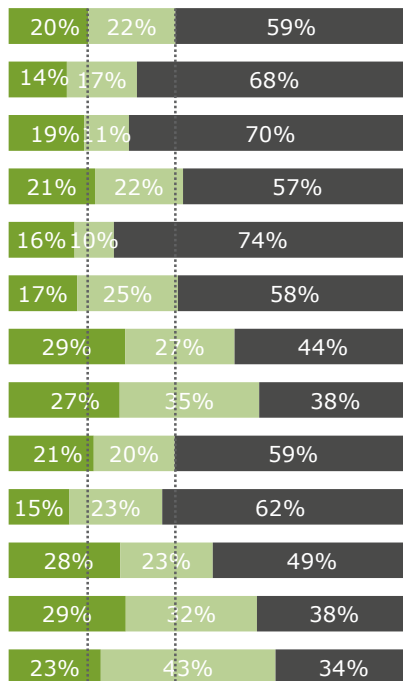
DENMARK: Price sensitivity



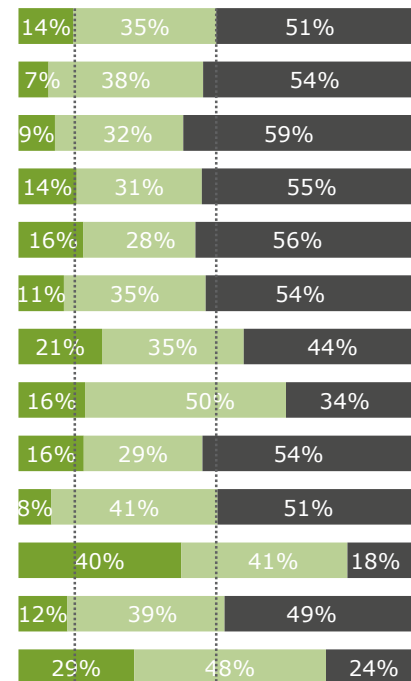
CHOICE OF ACCOMMODATION



CHOICE OF DESTINATION



CHOICE OF TRANSPORT



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

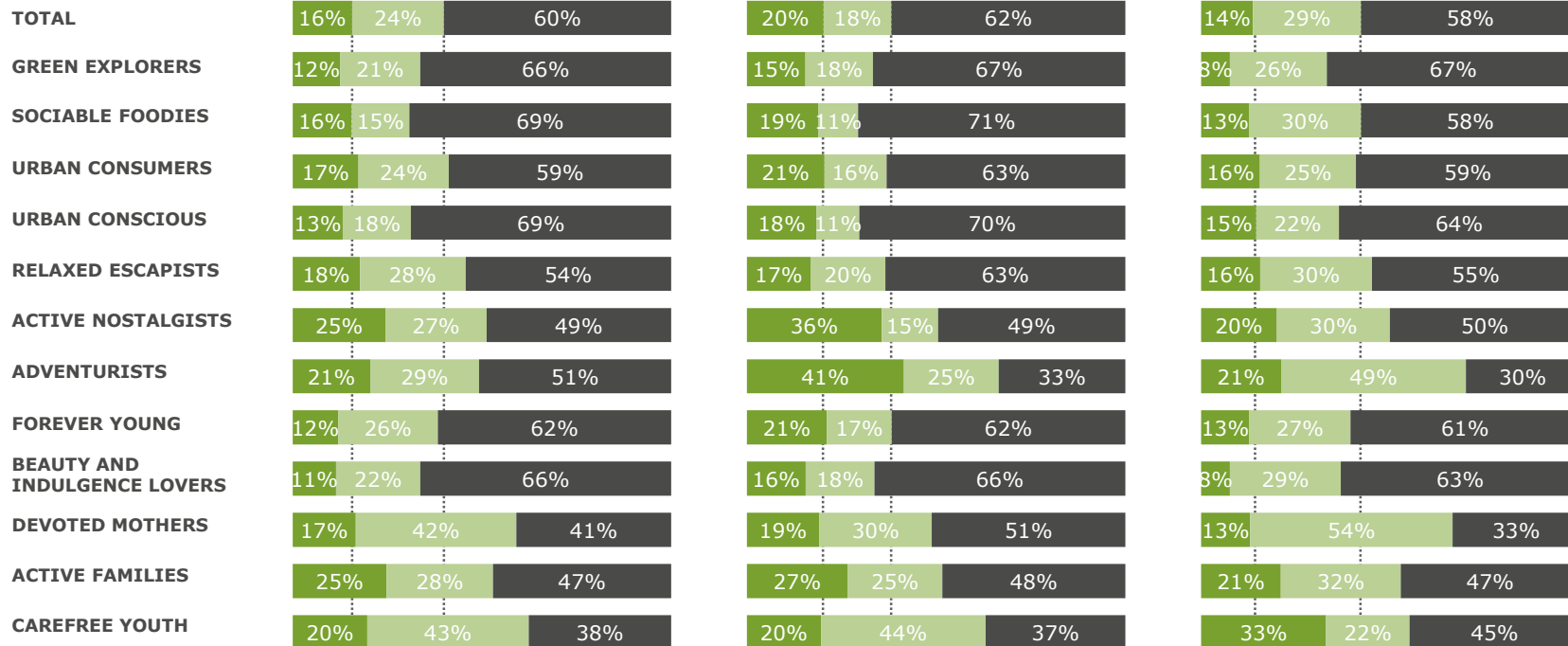
DENMARK: Price sensitivity



CHOICE OF ADDITIONAL ACTIVITIES

CHOICE OF FOOD

SHOPPING

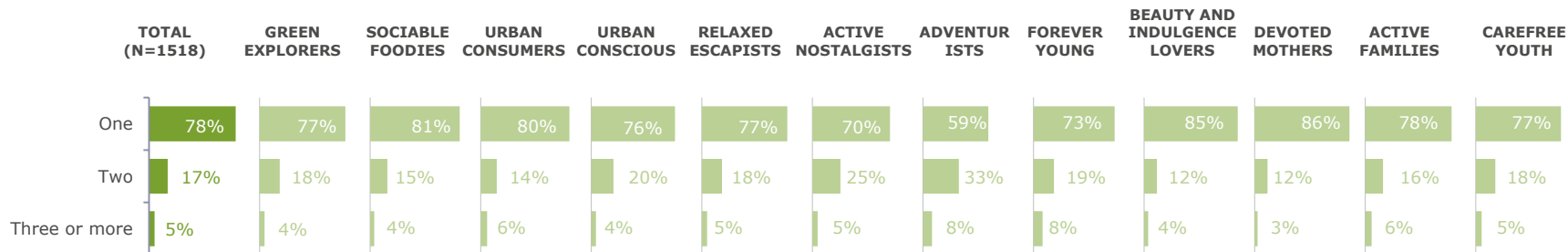


seek the most favourable offer
 assess value for money
 disregard the price

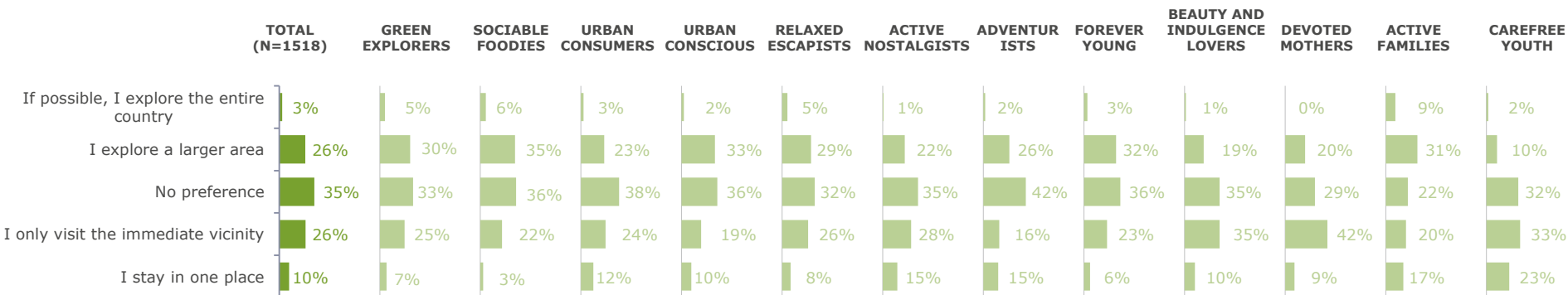
DENMARK: Level of exploration



Number of countries visited during one trip, break or holiday



Exploring in one country



GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY



DENMARK: General travel habits and motives



CHARACTERISTICS OF THE TARGET GROUP:

Size*	1.833.308	Summer	65%
Share*	51,6%	Autumn	13%
Age	41	Shorter trips	2
Women	47%	Longer trips	2

TRAVELLING WITH:

Family	41%
As a couple	37%
Friends	14%
Alone	8%
Relatives	1%

DESTINATION TYPE:

By the sea	38%	59%
Towns	15%	50%
Capital	10%	41%

4 x

a year
travels
abroad

ACTIVITIES - TOP 10:

Sun and sea	55%
Sightseeing of a town, the capital	50%
Sightseeing of old town centres	50%
Natural parks, attractions	47%
Tourist sights	41%
History and castles	39%
Shopping	38%
Gastronomic delights	28%
Recreation	26%
Museums, galleries, art	26%

TRAVEL MOTIVES - TOP 10:

Relaxation	11%	34%
Retreat from the everyday	12%	31%
Experience another culture	9%	30%
Enjoy good food, drinks	4%	30%
To learn something new	11%	29%
Visit a beautiful destination	7%	27%
Spend time with family, strengthen the bonds	11%	26%
Spend time with partner	6%	24%
Rest, slow down the pace of life	6%	20%
Visit a town, the capital	6%	19%

VISITING COUNTRIES - TOP 10:

Germany	38%	53%
Denmark	33%	50%
Spain	41%	49%
France	29%	40%
Sweden	25%	40%
Italy	33%	40%
Greece	27%	36%
United Kingdom of Great Britain and Northern Ireland	27%	35%
Norway	21%	34%
Austria	19%	31%
Slovenia	2%	3%

■ 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).

DENMARK: Elements of the purchase journey and consumption



TYPES OF ACCOMMODATION:



Other frequent accommodation types:

Private accommodation:

21%

Camp: 19%

Hostel: 14%

RESERVATION:

UP TO **3**
months in
advance

74%

TRANSPORT MODE (%):

AEROPLANE CAR MOTORHOME COACH MOTORCYCLE



75 - 19 67 2 3 2 37 1 4

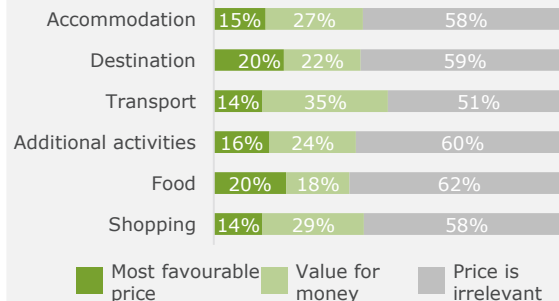


To the destination



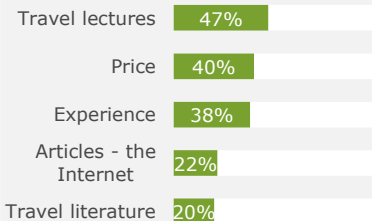
At the destination (22% TRAIN, 14% ON FOOT, 4% BICYCLE)

PRICE SENSITIVITY:

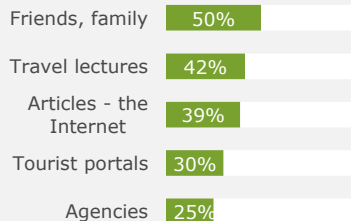


PURCHASE JOURNEY:

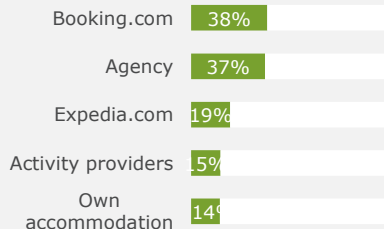
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	61 €	63 €
TRANSPORT MODE per person	127 €	136 €

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*	295.045	Summer	64%
Share*	8,3%	Autumn	14%
Age	38	Shorter trips	3
Women	32%	Longer trips	2

TRAVELLING WITH:

As a couple	38%
Family	35%
Friends	15%
Alone	11%
Relatives	1%

DESTINATION TYPE:

By the sea	34%	50%
Towns	19%	46%
In the mountains	13%	36%

5 x

a year
travels
abroad

ACTIVITIES - TOP 10:

Sightseeing of old town centres	46%
Sightseeing of a town, the capital	43%
Natural parks, attractions	42%
Sun and sea	42%
History and castles	37%
Tourist sights	36%
Gastronomic delights	28%
Museums, galleries, art	28%
Shopping	27%
Live like a local	27%

TRAVEL MOTIVES - TOP 10:

Enjoy good food, drinks	6%	30%
Experience another culture	13%	29%
Visit a beautiful destination	10%	28%
To learn something new	12%	27%
Spend time with family, strengthen the bonds	11%	23%
Retreat from the everyday	7%	21%
Relaxation	7%	20%
Visit a town, the capital	7%	19%
Rest, slow down the pace of life	5%	16%
Contact with nature	2%	15%

VISITING COUNTRIES - TOP 10:

Germany	32%	50%
Spain	33%	45%
Denmark	26%	45%
Italy	30%	41%
France	26%	41%
Austria	24%	39%
United Kingdom of Great Britain and Northern Ireland	25%	37%
Greece	26%	37%
the Netherlands	17%	33%
Sweden	18%	32%
Slovenia	11%	21%

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).

DENMARK: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia



TYPES OF ACCOMMODATION:



Other frequent accommodation types:

Friends, family: 21%

Camp: 20%

Hostel: 17%

RESERVATION:



80%

TRANSPORT MODE (%):

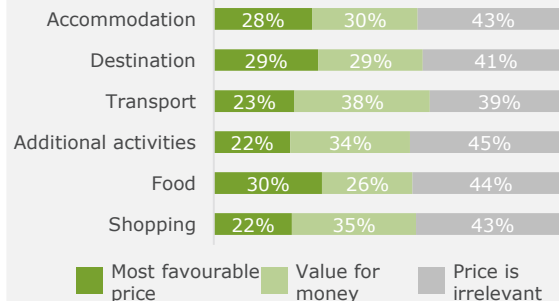
AEROPLANE CAR MOTORHOME COACH MOTORCYCLE



White box: To the destination

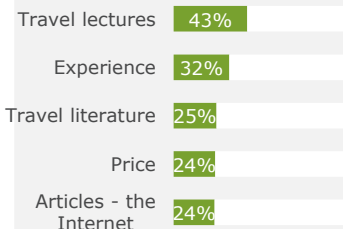
Grey box: At the destination (20% TRAIN, 6% BICYCLE, 6% ON FOOT)

PRICE SENSITIVITY:

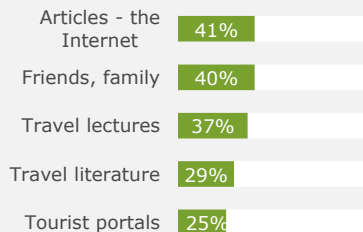


PURCHASE JOURNEY:

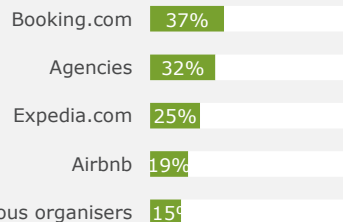
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS STROŠKI
ACCOMMODATION, FOOD and other per person/day	53 €	55 €
TRANSPORT MODE per person	126 €	151 €

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*	63.422	Summer	64%
Share*	1,8%	Autumn	18%
Age	41	Shorter trips	3
Women	33%	Longer trips	2

TRAVELLING WITH:

Family	49%
As a couple	32%
Friends	13%
Alone	6%

DESTINATION TYPE:

By the sea	30%	57%
Towns	14%	45%
Elsewhere in nature	11%	39%

5 x
a year
travels
abroad

ACTIVITIES - TOP 10:

Sightseeing of old town centres	58%
Sightseeing of a town, the capital	57%
Sun and sea	57%
Natural parks, attractions	56%
Tourist sights	55%
History and castles	55%
Gastronomic delights	40%
Museums, galleries, art	40%
Recreation	37%
Live like a local	33%

TRAVEL MOTIVES - TOP 10:

Experience another culture	13%	39%
Enjoy good food, drinks	13%	39%
To learn something new	15%	36%
Visit a beautiful destination	21%	34%
Retreat from the everyday	6%	28%
Spend time with family, strengthen the bonds	16%	25%
Relaxation	5%	23%
Contact with nature	2%	21%
Rest, slow down the pace of life	3%	19%
Visit a town, the capital	6%	18%

VISITING COUNTRIES - TOP 10:

Slovenia	53%	100%
Germany	58%	92%
Italy	59%	78%
France	56%	76%
Spain	60%	75%
Austria	50%	71%
Denmark	34%	69%
Sweden	39%	69%
the Netherlands	38%	67%
Norway	33%	67%

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).

DENMARK: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia



TYPES OF ACCOMMODATION:



Other frequent accommodation types:

Friends, family: 33%

Camp: 25%

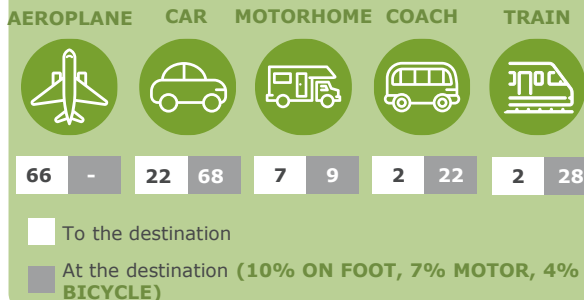
Hostel: 25%

RESERVATION:

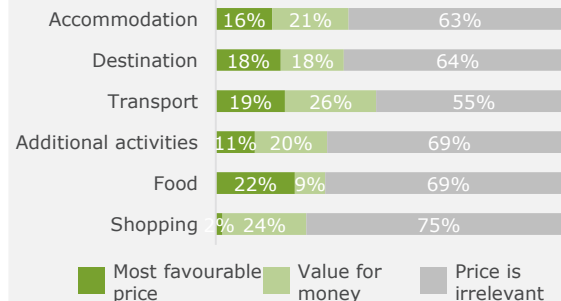


81%

TRANSPORT MODE (%):

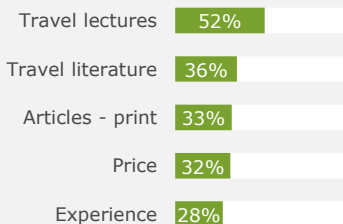


PRICE SENSITIVITY:

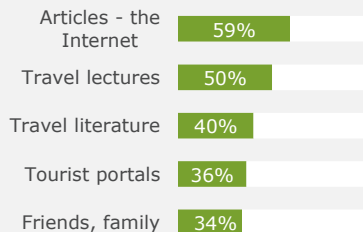


PURCHASE JOURNEY:

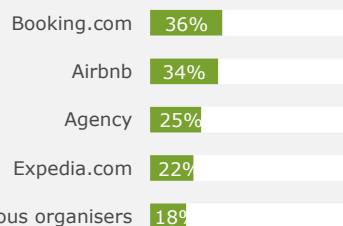
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS STROŠKI
ACCOMMODATION, FOOD and other per person/day	in Europe	54 €	52 €
	in SLO	46 €	107 €
TRANSPORT MODE per person	in Europe	138 €	149 €
	in SLO	125 €	130 €

NOTES:

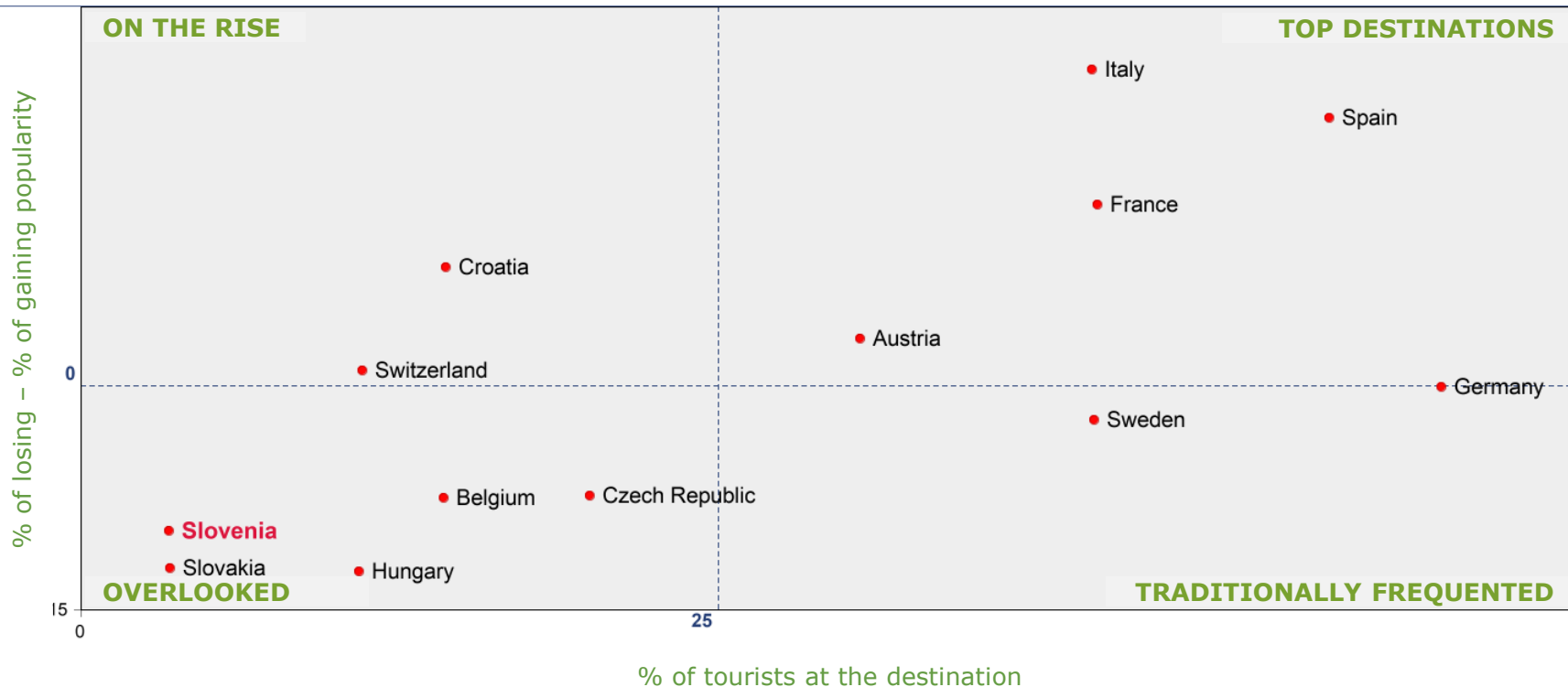
The results represent the subsample in the target group: they travel abroad at least once a year for a break or holiday, their destinations also include Slovenia. / TYPE OF ACCOMMODATION: where they usually spend the night. / RESERVATION: how far in advance they book. / TRANSPORT MODE: how they travel 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



DENMARK: Destination relevance

Share of visitors by popularity of the destination



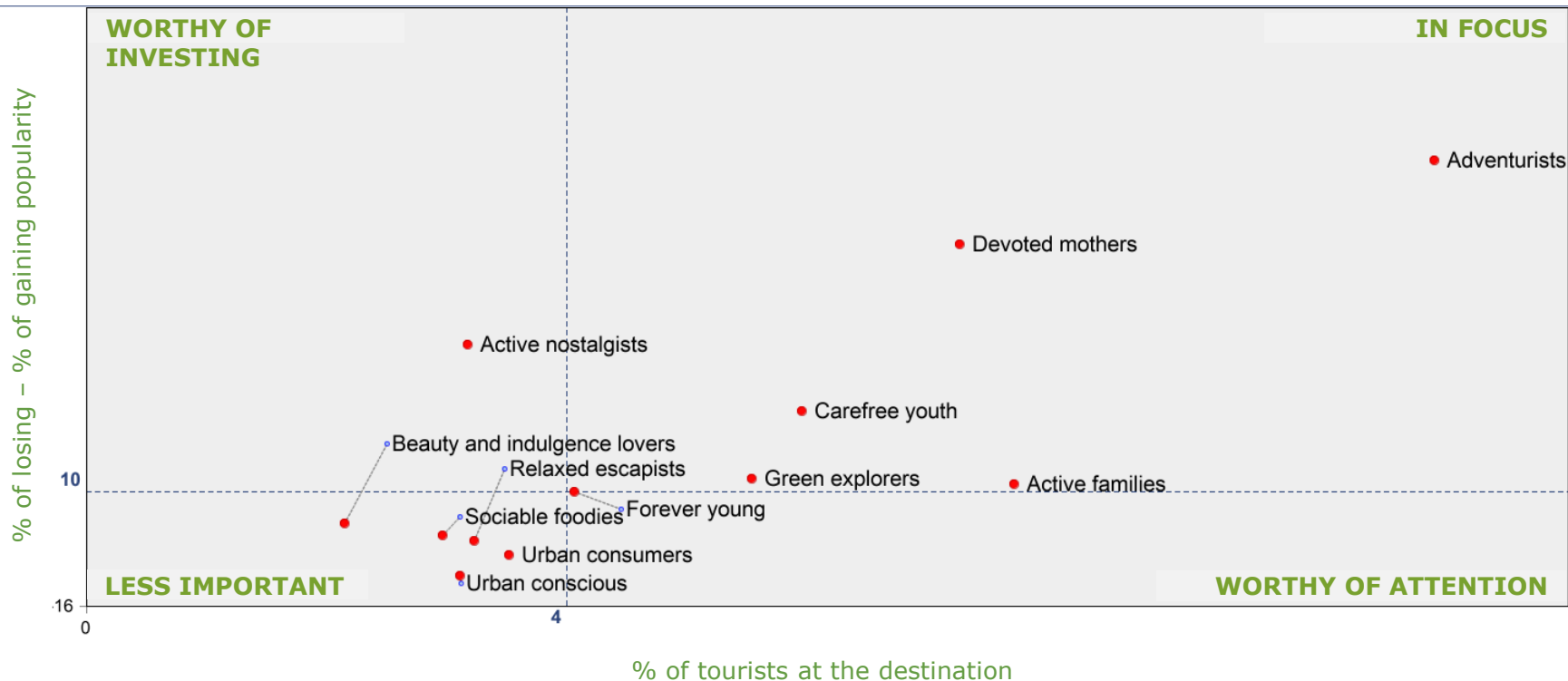
NOTES:

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).

DENMARK: Slovenia's relevance

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



NOTES:

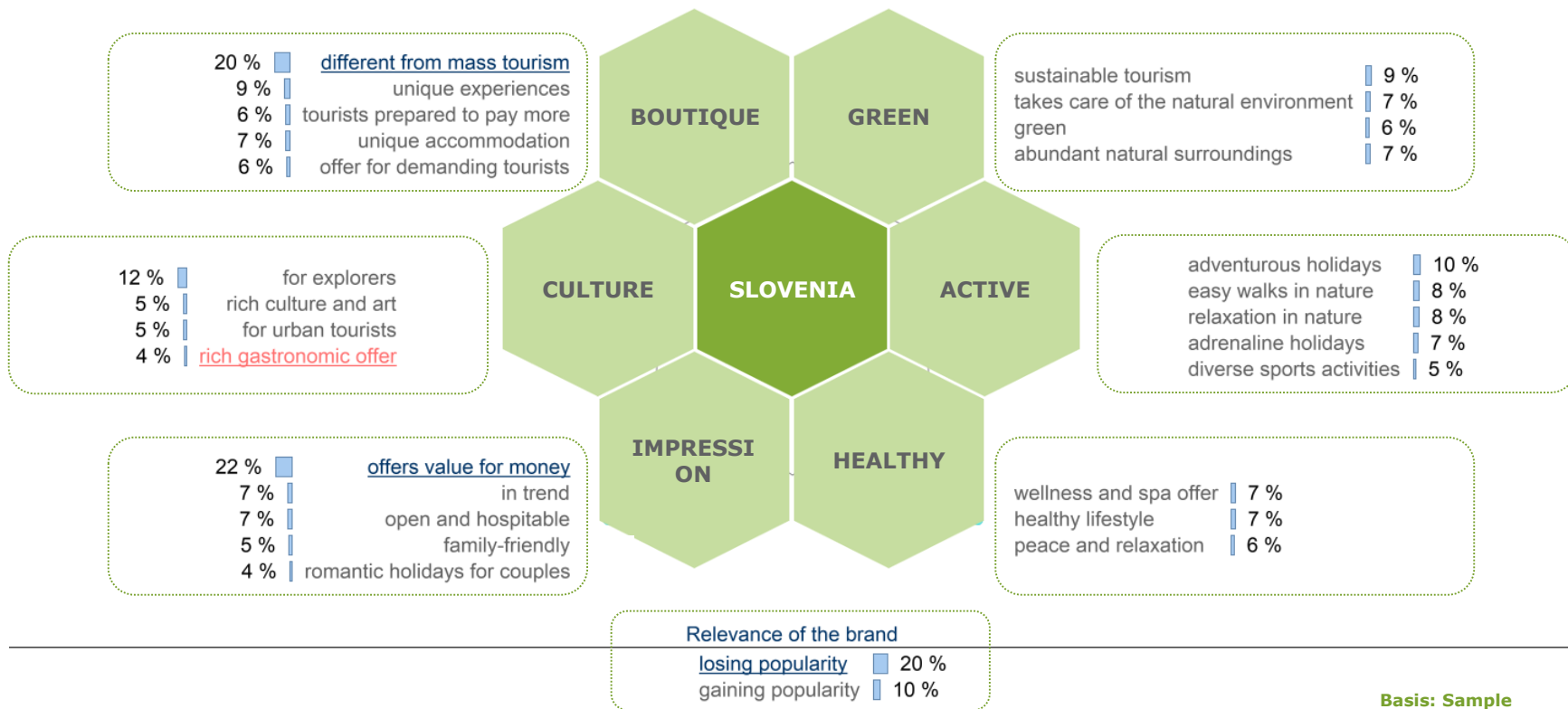
The chart shows the share of visitors according to the ratio of gaining – losing popularity (destination % losing – % gaining).

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).

DENMARK: Slovenia's image



n=1518



Basis: Sample

NOTES:

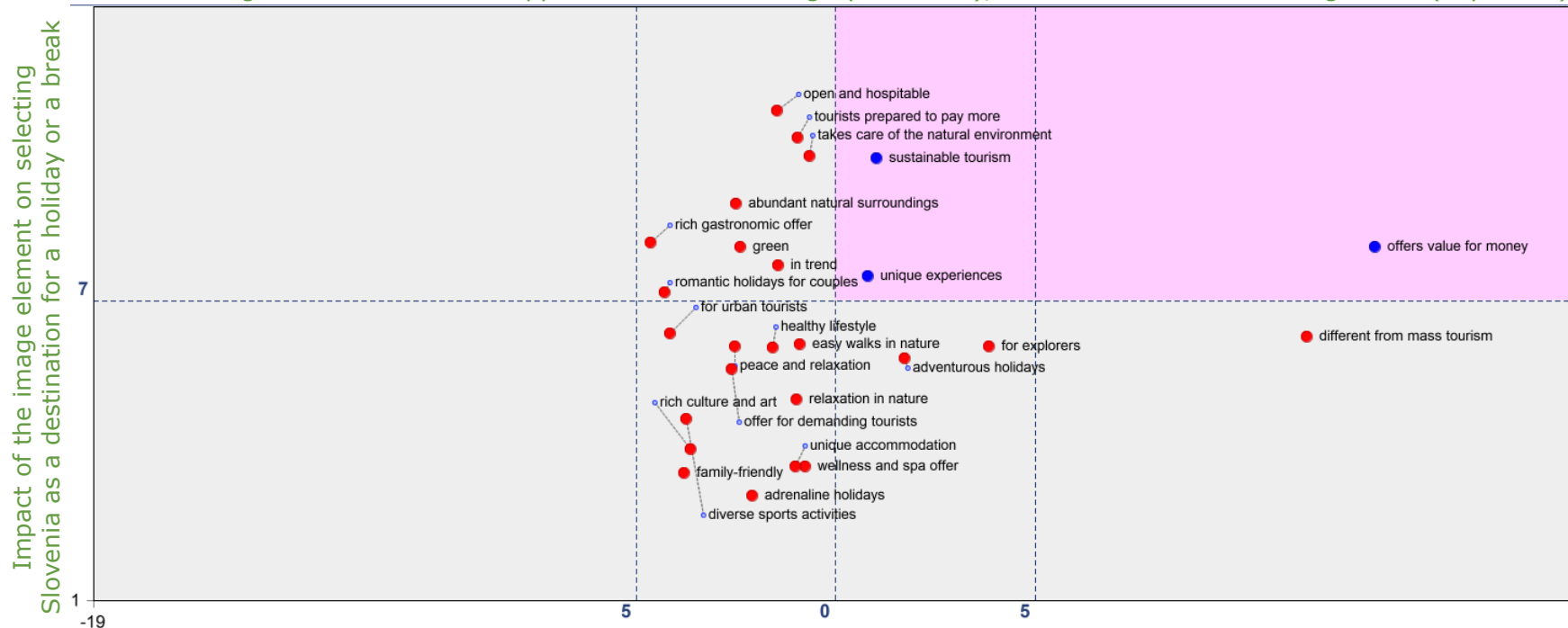
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

DENMARK: 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:

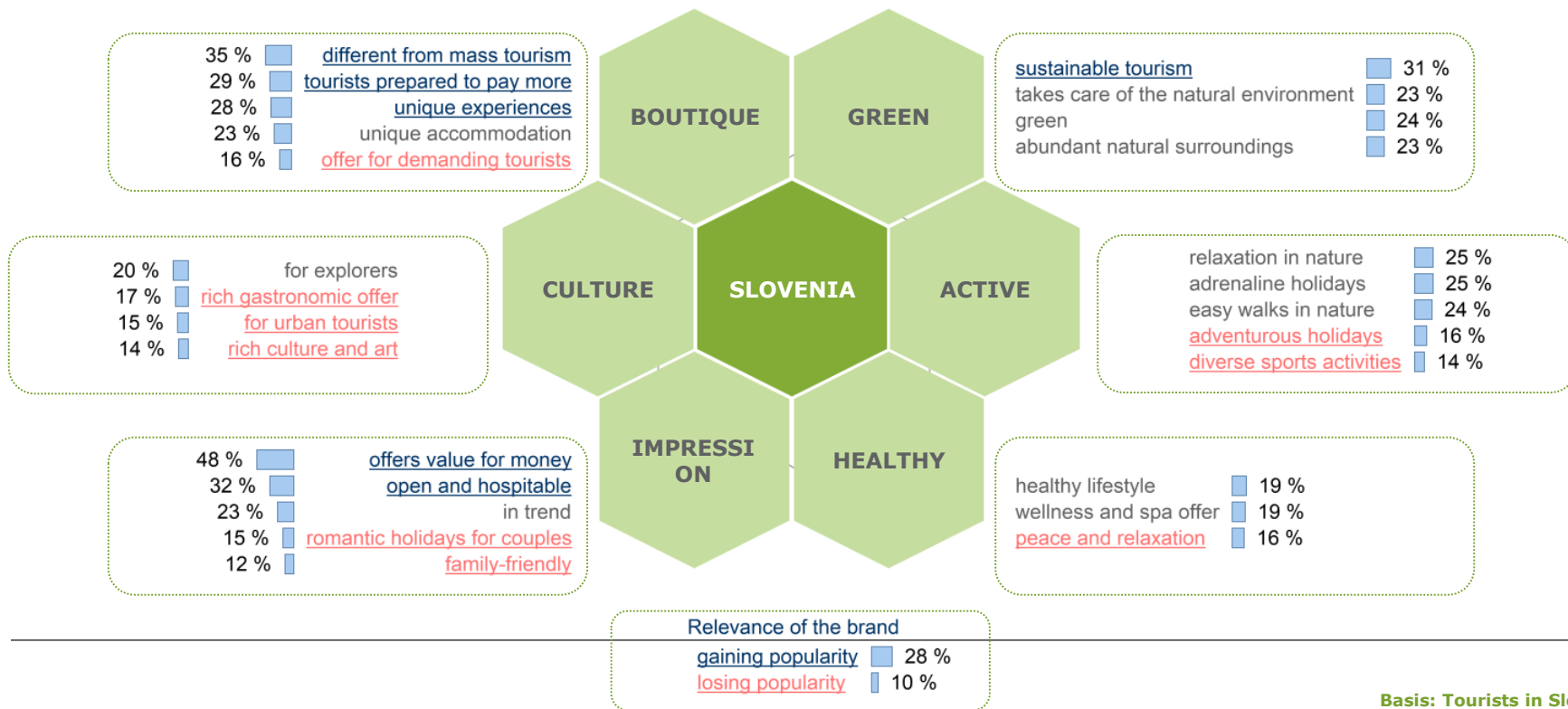
Guidelines for interpretation: elements in the upper right quadrant have a strong impact on the destination's image. These are the elements which influence an individual's decision to spend a holiday at a destination. The upper middle quadrant represents new opportunities.

DENMARK: Slovenia's image

Subsample: tourists in Slovenia



n=53



Basis: Tourists in Slovenia

NOTES:

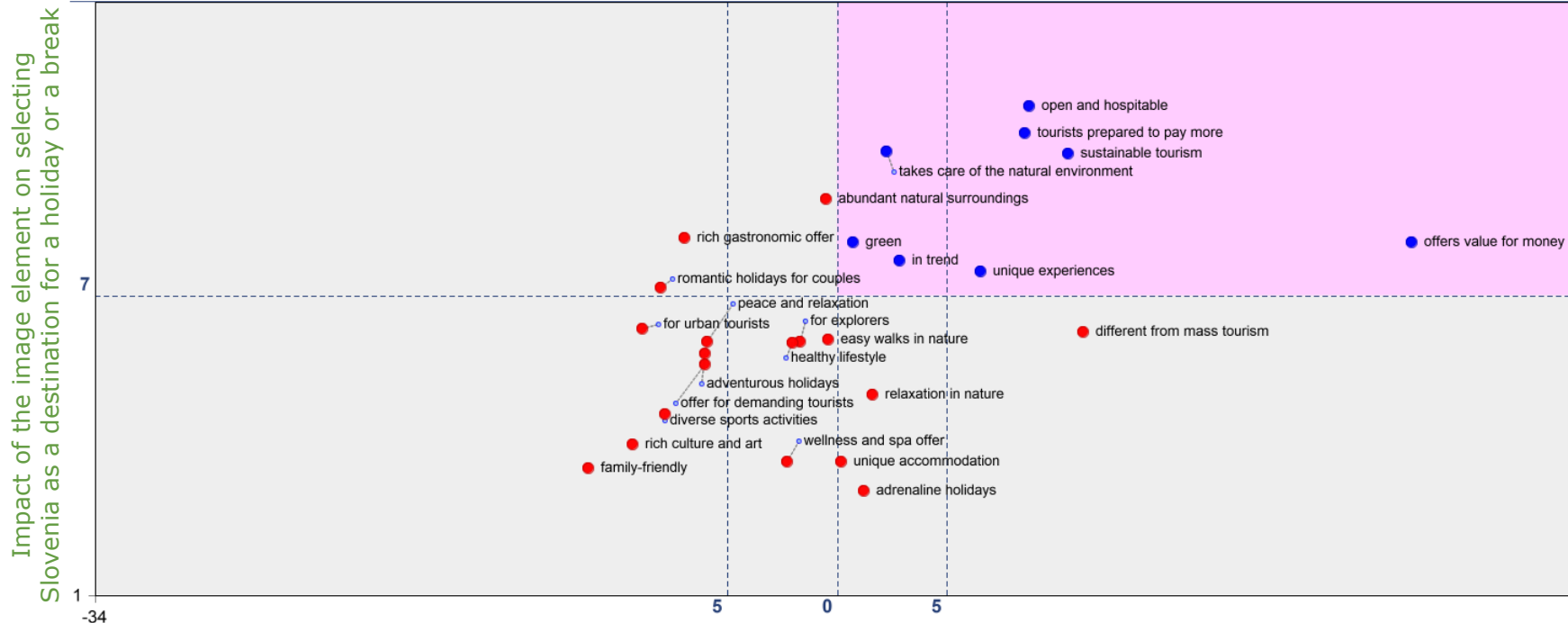
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

DENMARK: 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)

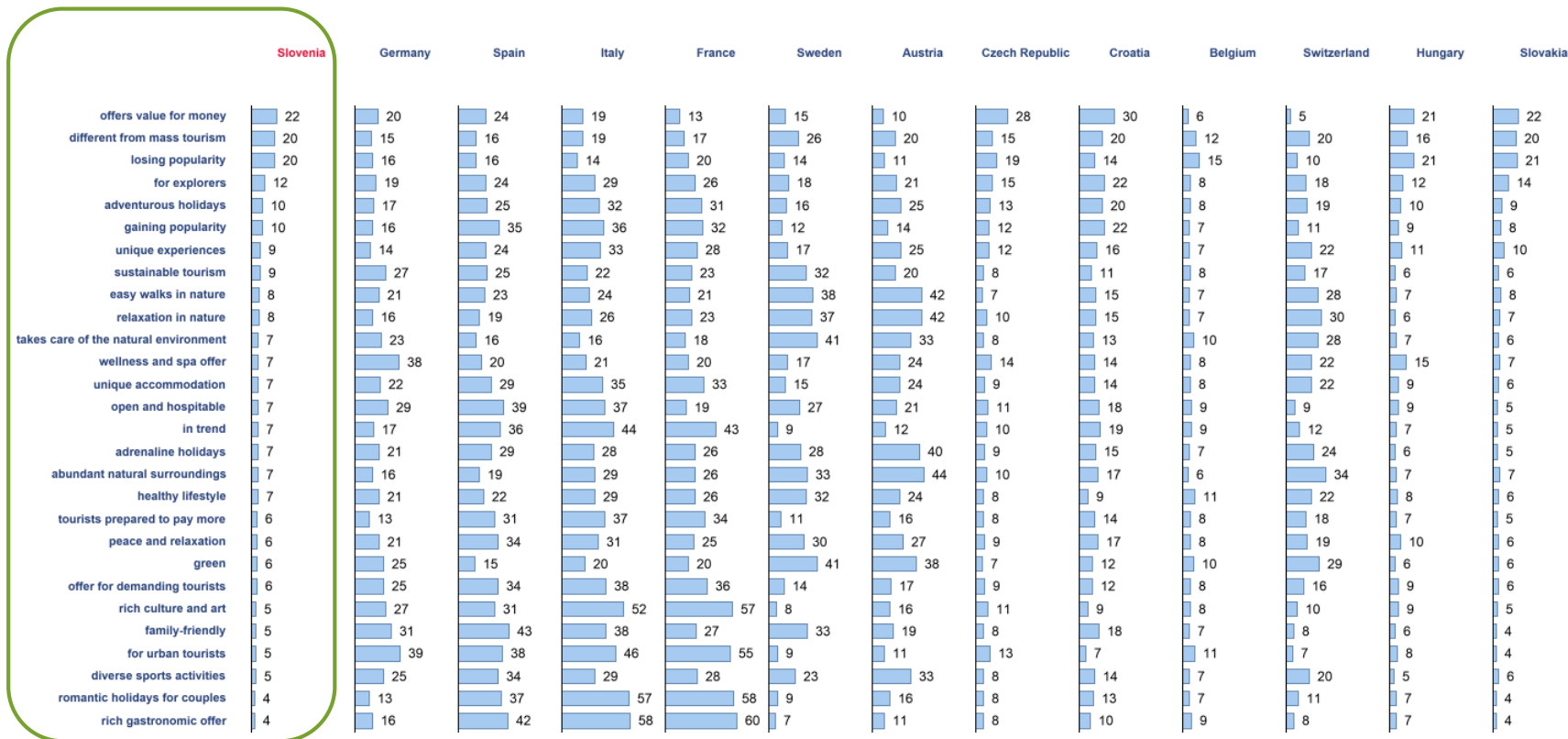


Weak association of Slovenia ← → Stronger association of Slovenia

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.

DENMARK: 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 by destinations by elements are shown. The elements are classified according to the share of statements for Slovenia.

DENMARK: 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

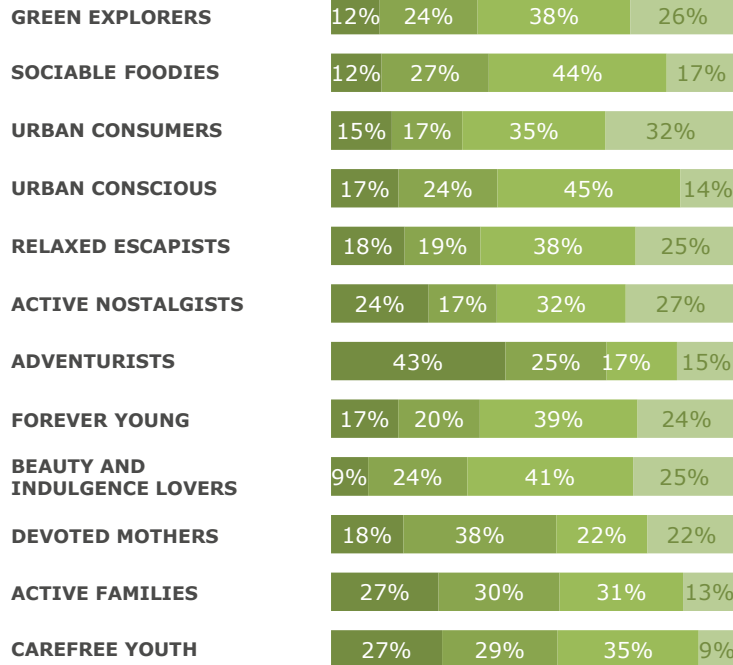


DENMARK: Knowledge of, and experience with, Slovenia

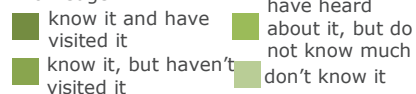


KNOWLEDGE OF SLOVENIA

Base: sample

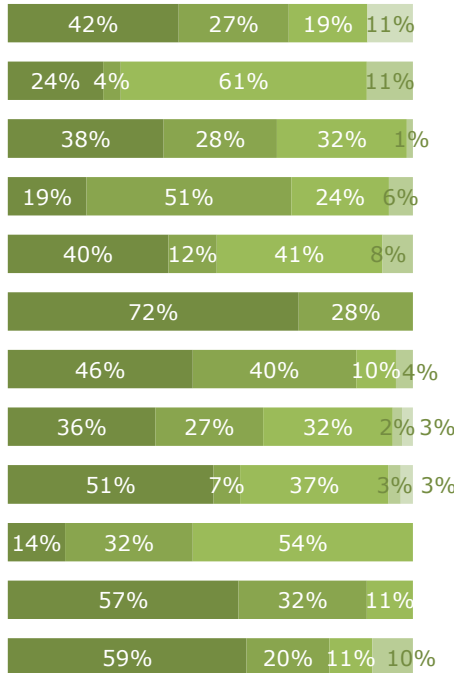


Knowledge:



SATISFACTION

Base: visitors of Slovenia

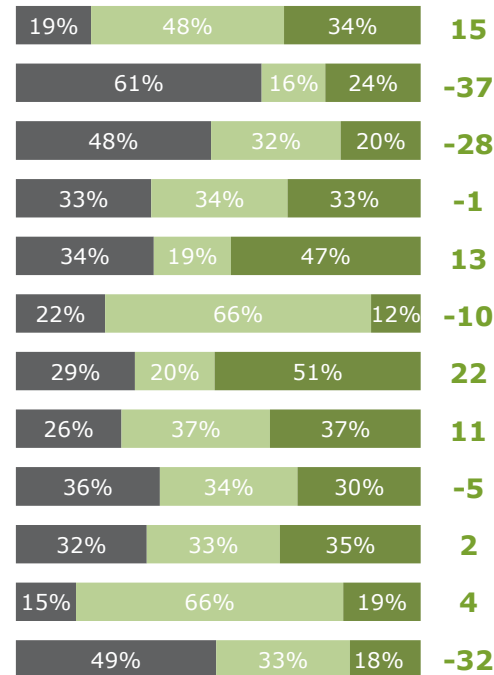


Meeting of expectations:



NPS – DEGREE OF RECOMMENDATION

NPS Index



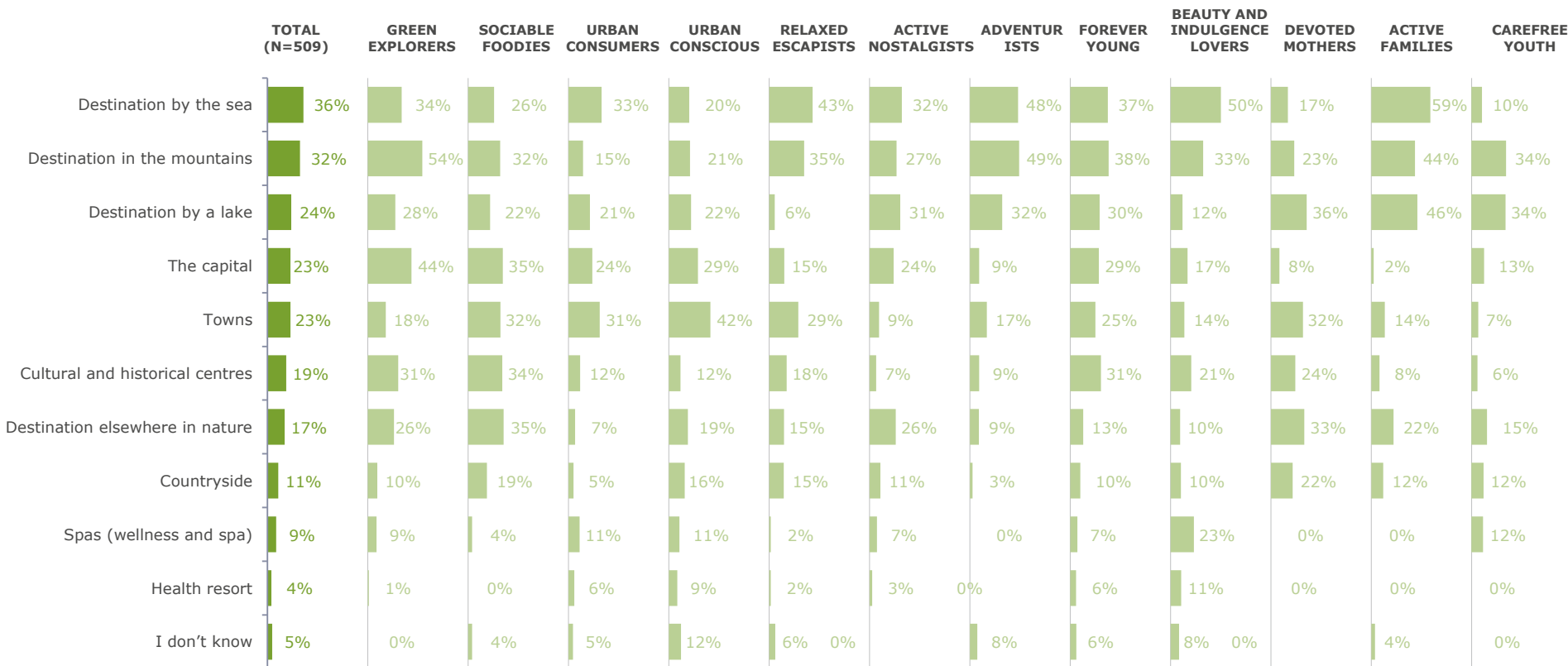
Recommendations:



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.

DENMARK: Destination type in Slovenia

Subsample: visitors to Slovenia



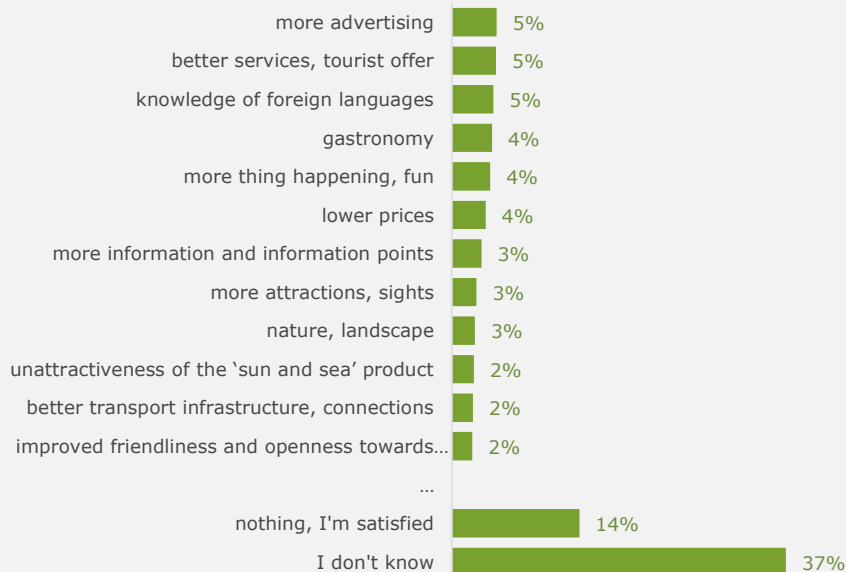
NOTES:

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=173

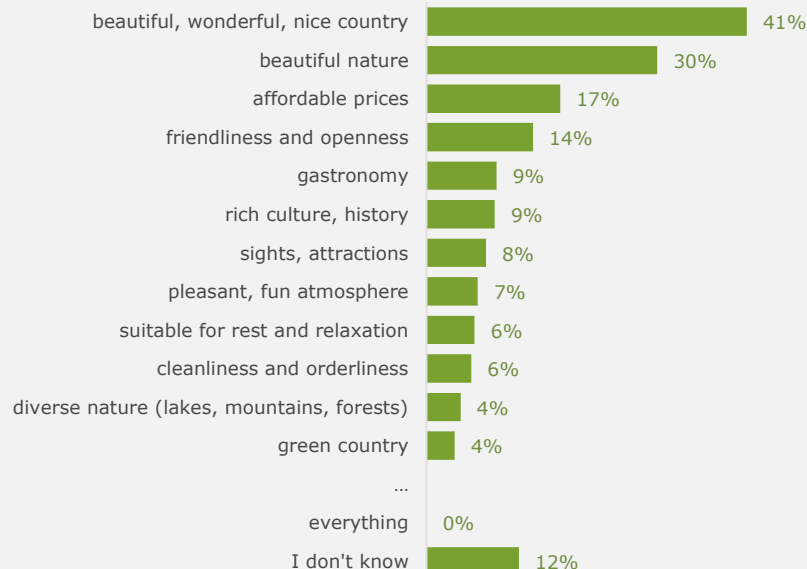


NOTES:

OTHER STATEMENTS: better cleanliness, orderliness, hotels and accommodation of better quality, offer of local goods and own culture, I'm not familiar enough, more sports activities, modernisation, preservation of safety

Elements of excitement – Top 12

Promoters (would recommend Slovenia), n=71

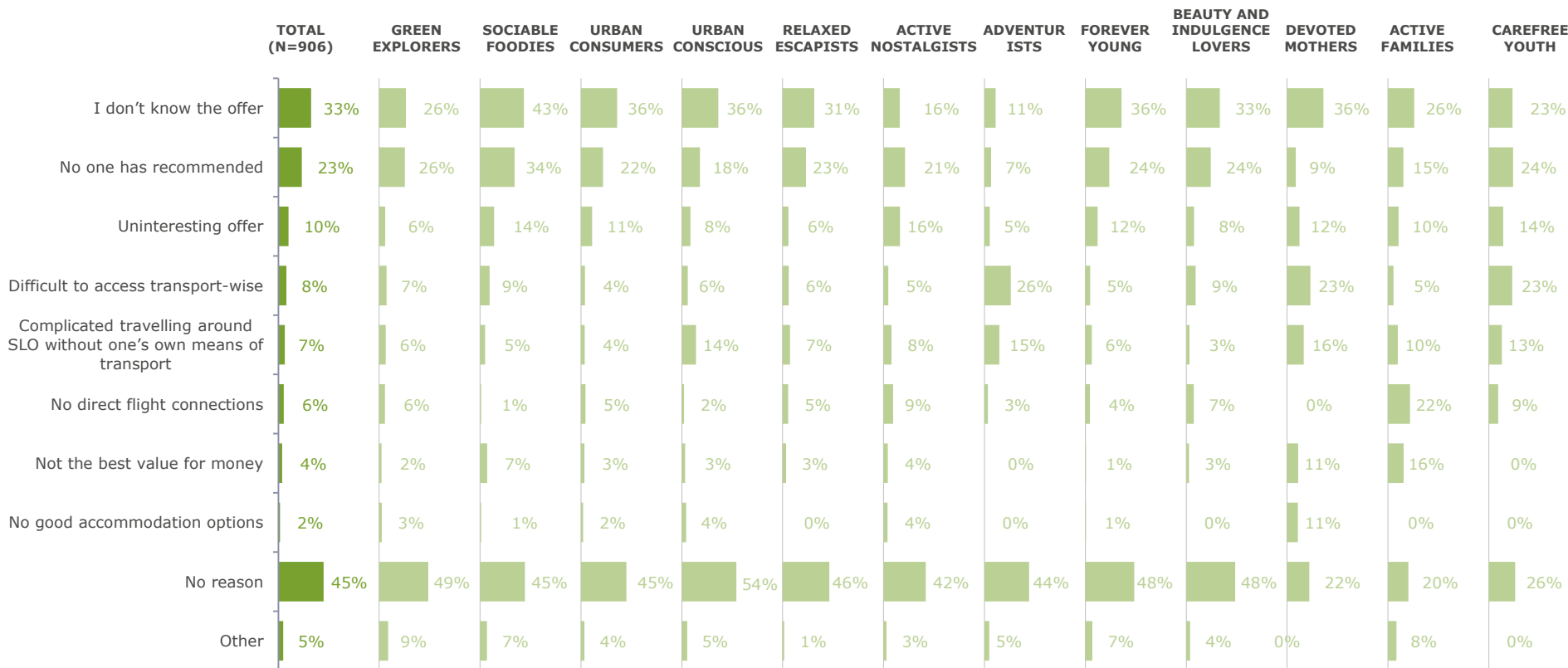


NOTES:

OTHER STATEMENTS: it is not crowded, no mass tourism, good and high-quality services, attractiveness of the 'sun and sea' product, activities, recreation, accommodation

DENMARK: 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

DENMARK: Green explorers (11,3%)



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

Capital	71%	+30
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Question: What type of destination do you usually choose for your break, holiday or trip?

TYPES OF ACCOMMODATION

Apartment	65%	+20
-----------	------------	------------

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	21%	+2
-----	------------	-----------

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

TRANSPORT AT THE DESTINATION

Coach	45%	+8
-------	------------	-----------

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

ACTIVITIES

Natural sights, nature	72%	+25
Sightseeing of a town, the capital	69%	+18

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

MOTIVATION

Travel presentations	52%	+5
Price of destination	47%	+7

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

INFORMATION

Travel presentations	52%	+10
Travel literature	33%	+9

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

RESERVATION METHOD

Airbnb	20%	+6
Booking.com	40%	+2
At the destination	19%	+5

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

TRAVELLING WITH

Family	42%	+2
As a couple	37%	+0
Alone	9%	+1

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

CHARACTERISTICS:

Size*	207.891
Share*	6%
Age	41
Women	46%

Summer	65%
Autumn	13%
Shorter trips	2
Longer trips	2

DENMARK: General travel habits and motives



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

CHARACTERISTICS OF THE TARGET GROUP:

Size*	1.833.308	65%
Share*	51,6%	13%
Age	41	2
Women	47%	2

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

Longer trips

TRAVELLING WITH:

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

Alone	8%
Relatives	1%

DESTINATION TYPE:

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

Capital	10%	31%	41%
---------	-----	-----	-----

4 x
a year

Frequency of travelling abroad irrespective of the length

ACTIVITIES - TOP 10:

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

and sea	55%
Tourist attractions	41%
History and castles	39%
Shopping	38%
Gastronomic delights	28%
Recreation	26%
Museums, galleries, art	26%

TRAVEL MOTIVES - TOP 10:

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

Relaxation	11%	34%
To learn something new	11%	29%
Visit a beautiful destination	7%	27%
Spend time with family, strengthen bonds	11%	26%
Spend time with partner	6%	24%
Rest, slow down the pace of life	6%	20%
Visit a town, the capital	6%	19%

VISITING COUNTRIES - TOP 10:

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)

Germany	38%	53%
Greece	27%	36%
United Kingdom	27%	35%
Norway	21%	34%
Austria	19%	31%
Slovenia	2%	3%

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).

DENMARK: Elements of the purchase journey and consumption



TYPES 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 (%)

LETALO AVTODOM AVTOBUS MOTOR



75

To the destination

At the destination (22% TRAIN, 14% ON FOOT, 4% BICYCLE)



1

4

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?

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.

PRICE SENSITIVITY:

Accommodation 27% 58%

Additional

Food 20% 18% 62%

Shopping 14% 29% 58%

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.

MOTIVATION

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)

SOURCES OF

RESERVATION METHOD:

Experience 38%
Articles - the Internet 22%
Travel literature 20%

Articles - the Internet 39%
Tourist portals 30%
Agencies 25%

Expedia.com 19%
At the activity provider 5%
Own accommodation 14%

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.

MODE per person 127 € 150 €

NOTES:

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



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