



IDENTIFICATION OF MARKET POTENTIAL

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

November 2018



Contracting Authority

Name: Slovenian Tourist Board

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Contractor

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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



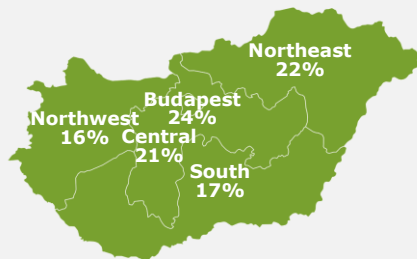
| | |
|------------------------------------|---|
| Method of implementation | Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company. |
| Country of implementation | Hungary |
| Implementation period | 2 October – 15 October 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=5.911; Target group: n=1.560; Visitors to Slovenia: n=605; Tourists in Slovenia: n=233. |
| 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=20:55. |



HUNGARY: Sample demographics



REGIONS:



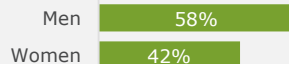
DETAILED DEFINITION OF REGIONS:

Northwest: Győr-Ménfőcsanak, Komárom-Esztergom, Vas county, Veszprém, Zala.

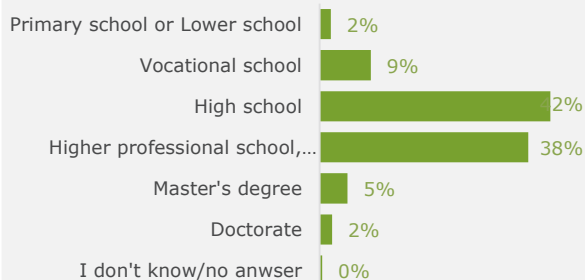
Northeast: Borsod-Abaúj-Zemplén, Hajdú-Bihar, Heves, Nógrád, Szabolcs-Szatmár-Bereg.

South: Bács-Kiskun, Baranya, Békés, Csongrád, Somodská županija. **Central:** Fejér, Jász-Nagykun-Szolnok, Pešta, Tolna. **Budapest.**

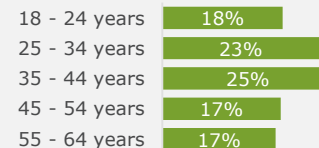
GENDER:



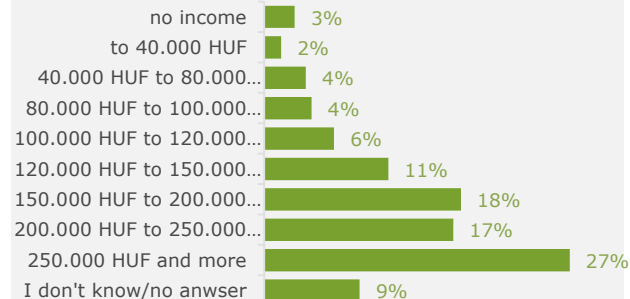
EDUCATION:



AGE:



PERSONAL INCOME:





Sample shares and sizes



Bordered ellipses show the basis for share calculations.



| Basis: HUNGARY 18-65 years | |
|----------------------------|--------|
| POPULATION (18-65 YEARS) | 100,0% |
| TARGET GROUP | 26,4% |
| VISITORS TO SLOVENIA | 10,2% |
| TOURISTS IN SLOVENIA | 3,4% |

| Basis: TARGET GROUP | |
|--------------------------|--------|
| POPULATION (18-65 YEARS) | / |
| TARGET GROUP | 100,0% |
| VISITORS TO SLOVENIA | 38,8% |
| TOURISTS IN SLOVENIA | 13,0% |

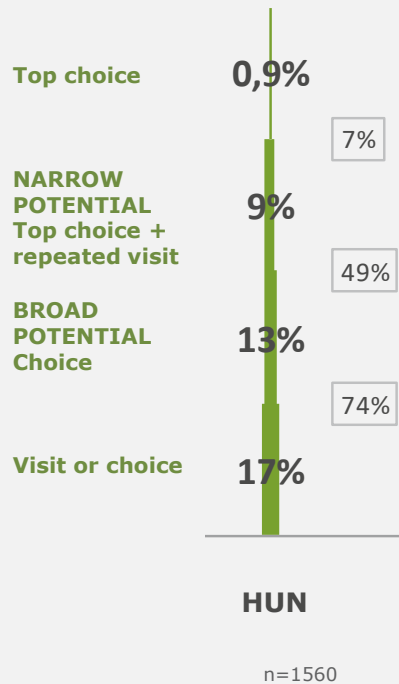
| Absolute size* | |
|----------------|-----------|
| | 6.382.651 |
| | 1.686.633 |
| | 653.837 |
| | 218.462 |

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

MARKET STRUCTURE AND SIZE (PERSONAS)



HUNGARY: Size of the potential



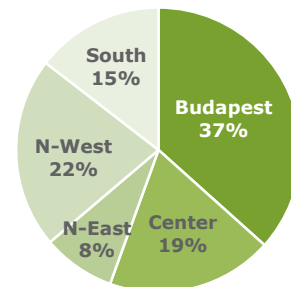
NARROW POTENTIAL:

9%

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: | 143.461 |
| Budapest | 52.562 |
| Central | 27.104 |
| Northeast | 11.855 |
| Northwest | 31.086 |
| South | 20.853 |

REGIONAL CLASSIFICATION::



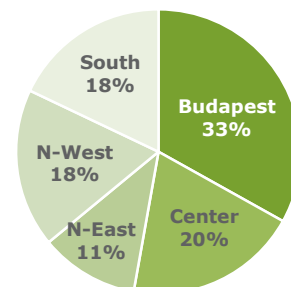
BROAD POTENTIAL:

13%

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: | 214.391 |
| Budapest | 70.959 |
| Central | 42.252 |
| Northeast | 24.066 |
| Northwest | 38.657 |
| South | 38.456 |

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.

HUNGARY: Size of segments by regions



GREEN EXPLORERS:

18,4%

309.499



URBAN CONSUMERS

14,1%

238.054

BEAUTY AND
INDULGENCE LOVERS:

13,8%

233.024

| | Total | Budapest | Central | Northeast | Northwest | South |
|---------------------------------------|-----------|----------|---------|-----------|-----------|---------|
| Size (%) | 100,0% | 23,6% | 20,8% | 22,4% | 16,1% | 17,1% |
| Size | 1.686.633 | 397.776 | 351.343 | 378.418 | 270.846 | 288.251 |
| GREEN EXPLORERS Size (%) | 18,4% | 25,2% | 20,1% | 20,5% | 14,7% | 19,4% |
| Size | 309.499 | 78.125 | 62.305 | 63.559 | 45.571 | 59.940 |
| SOCIABLE FOODIES Size (%) | 5,6% | 27,0% | 17,9% | 16,8% | 22,9% | 15,3% |
| Size | 94.418 | 25.496 | 16.925 | 15.899 | 21.667 | 14.431 |
| URBAN CONSUMERS Size (%) | 14,1% | 23,5% | 18,5% | 26,5% | 15,8% | 15,7% |
| Size | 238.054 | 56.033 | 44.029 | 63.014 | 37.638 | 37.339 |
| URBAN CONSCIOUS Size (%) | 3,1% | 31,8% | 11,4% | 24,8% | 17,5% | 14,5% |
| Size | 51.889 | 16.491 | 5.934 | 12.864 | 9.083 | 7.517 |
| RELAXED ESCAPISTS Size (%) | 6,9% | 20,9% | 25,2% | 22,2% | 14,2% | 17,4% |
| Size | 115.790 | 24.213 | 29.211 | 25.718 | 16.477 | 20.171 |
| ACTIVE NOSTALGISTS Size (%) | 5,0% | 14,8% | 20,9% | 27,2% | 14,5% | 22,7% |
| Size | 84.264 | 12.439 | 17.621 | 22.882 | 12.185 | 19.136 |
| ADVENTURISTS Size (%) | 4,7% | 23,2% | 25,1% | 30,0% | 6,7% | 14,9% |
| Size | 78.715 | 18.251 | 19.761 | 23.643 | 5.304 | 11.757 |
| FOREVER YOUNG Size (%) | 13,2% | 23,0% | 17,1% | 22,7% | 19,1% | 18,1% |
| Size | 223.221 | 51.280 | 38.141 | 50.705 | 42.692 | 40.403 |
| BEAUTY AND INDULGENCE LOVERS Size (%) | 13,8% | 26,2% | 21,1% | 19,1% | 16,5% | 17,0% |
| Size | 233.024 | 61.143 | 49.153 | 44.528 | 38.521 | 39.678 |
| DEVOTED MOTHERS Size (%) | 5,1% | 19,4% | 30,9% | 21,3% | 10,7% | 17,7% |
| Size | 85.621 | 16.575 | 26.491 | 18.240 | 9.182 | 15.133 |
| ACTIVE FAMILIES Size (%) | 6,2% | 23,3% | 25,5% | 16,9% | 20,0% | 14,3% |
| Size | 104.720 | 24.448 | 26.670 | 17.695 | 20.951 | 14.955 |
| CAREFREE YOUTH Size (%) | 4,0% | 19,7% | 22,4% | 29,2% | 17,2% | 11,6% |
| Size | 67.418 | 13.281 | 15.100 | 19.671 | 11.574 | 7.792 |

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 | 72% |
| In the mountains | 49% |
| By a lake | 42% |
| Elsewhere in nature | 38% |
| Towns | 31% |

TYPES OF ACCOMMODATION

| | |
|-------------------------------------|-----|
| Hotel | 71% |
| Apartment | 68% |
| Staying with relatives or friends | 31% |
| Hostel | 30% |
| Private accommodation (e.g. Airbnb) | 30% |

TRANSPORT TO THE DESTINATION

| | |
|--------------------|-----|
| Car | 47% |
| Aeroplane | 37% |
| Coach | 10% |
| Train | 3% |
| Motorhome (camper) | 2% |

TRANSPORT AT THE DESTINATION

| | |
|---------|-----|
| Car | 75% |
| Coach | 24% |
| Train | 18% |
| On foot | 11% |
| Bicycle | 6% |

ACTIVITIES

| | |
|------------------------------------|-----|
| Sun and sea | 61% |
| Sightseeing of old town centres | 54% |
| History and castles | 50% |
| Sightseeing of a town, the capital | 48% |
| Natural sights, nature | 46% |

MOTIVATION

| | |
|------------------------------|-----|
| Recommendations from friends | 55% |
| Past experience | 51% |
| Articles on the Internet | 33% |
| Price of the destination | 29% |
| Videos on the Internet | 21% |

SOURCE OF INFORMATION

| | |
|--------------------------------|-----|
| Articles on the Internet | 55% |
| Friends, family | 52% |
| Blogs | 32% |
| Web forums | 30% |
| Web portals (TripAdvisor etc.) | 28% |

RESERVATION METHOD

| | |
|--|-----|
| Booking.com | 49% |
| Agency | 35% |
| Directly at the accommodation provider | 30% |
| Airbnb | 13% |
| Organiser | 12% |

TRAVELLING WITH

| | |
|-------------|-----|
| Family | 43% |
| As a couple | 36% |
| Friends | 16% |
| Alone | 5% |
| Relatives | 1% |

CHARACTERISTICS:

| | |
|--------|------------------|
| Size* | 1.686.633 |
| Share* | 26% |
| Age | 39 |
| Women | 42% |

| | |
|---------------|------------|
| Summer | 79% |
| Autumn | 10% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Visitors to Slovenia (38,8%)



DESTINATION TYPE

| | | |
|--|------------|-----------|
| In the mountains | 50% | +2 |
| By the sea | 73% | +1 |
| <u>Cultural and historical centres</u> | <u>32%</u> | <u>+3</u> |
| Towns | 33% | +2 |
| By a lake | 42% | +0 |

TYPES OF ACCOMMODATION

| | | |
|-------------------------------------|------------|-----------|
| <u>Hotel</u> | <u>77%</u> | <u>+5</u> |
| Hostel | 32% | +2 |
| Private accommodation (e.g. Airbnb) | 32% | +2 |
| <u>Boutique hotel</u> | <u>19%</u> | <u>+4</u> |
| Apartment | 66% | -1 |

TRANSPORT TO THE DESTINATION

| | | |
|--------------------|------------|-----------|
| <u>Aeroplane</u> | <u>41%</u> | <u>+5</u> |
| Car | 46% | +0 |
| Motorhome (camper) | 2% | +0 |
| Train | 2% | -1 |
| Motorcycle | 1% | +0 |

TRANSPORT AT THE DESTINATION

| | | |
|--------------------|------------|-----------|
| <u>Car</u> | <u>77%</u> | <u>+3</u> |
| Train | 19% | +1 |
| Coach | 22% | -2 |
| Motorhome (camper) | 5% | +1 |
| Bicycle | 5% | -1 |

ACTIVITIES

| | | |
|--|------------|-----------|
| <u>Sightseeing of old town centres</u> | <u>60%</u> | <u>+7</u> |
| <u>Sports activities</u> | <u>34%</u> | <u>+6</u> |
| Museums, galleries and art | 34% | +3 |
| <u>Recreation</u> | <u>26%</u> | <u>+4</u> |
| History and castles | 50% | +0 |

MOTIVATION

| | | |
|-------------------------------------|------------|-----------|
| <u>Travel literature</u> | <u>24%</u> | <u>+7</u> |
| Articles on the Internet | 35% | +3 |
| Price of the destination | 30% | +2 |
| <u>Proximity of the destination</u> | <u>18%</u> | <u>+3</u> |
| <u>Articles in print media</u> | <u>17%</u> | <u>+3</u> |

SOURCE OF INFORMATION

| | | |
|---------------------------------------|------------|-----------|
| Articles on the Internet | 58% | +3 |
| <u>Web portals (TripAdvisor etc.)</u> | <u>32%</u> | <u>+4</u> |
| <u>Travel literature</u> | <u>24%</u> | <u>+5</u> |
| Web forums | 32% | +2 |
| Blogs | 33% | +1 |

RESERVATION METHOD

| | | |
|---------------------------------|------------|-----------|
| <u>Booking.com</u> | <u>55%</u> | <u>+6</u> |
| <u>Airbnb</u> | <u>17%</u> | <u>+4</u> |
| Agency | 36% | +1 |
| <u>At the activity provider</u> | <u>10%</u> | <u>+2</u> |
| <u>Expedia.com</u> | <u>8%</u> | <u>+2</u> |

TRAVELLING WITH

| | | |
|-------------|-----|----|
| Family | 42% | +0 |
| As a couple | 39% | +3 |
| Friends | 15% | -1 |
| Alone | 4% | -1 |
| Relatives | 1% | +0 |

CHARACTERISTICS:

| | |
|--------|----------------|
| Size* | 653.837 |
| Share* | 10% |
| Age | 40 |
| Women | 34% |

| | |
|---------------|------------|
| Summer | 80% |
| Autumn | 8% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Tourists in Slovenia (13%)



DESTINATION TYPE

| | | |
|--|------------|------------|
| <u>In the mountains</u> | 59% | +10 |
| By the sea | 75% | +3 |
| <u>Cultural and historical centres</u> | 38% | +9 |
| By a lake | 44% | +3 |
| Elsewhere in nature | 40% | +2 |

TYPES OF ACCOMMODATION

| | | |
|--|------------|-----------|
| <u>Hotel</u> | 78% | +7 |
| <u>Private accommodation (e.g. Airbnb)</u> | 37% | +7 |
| <u>Apartment</u> | 74% | +7 |
| Camp | 31% | +4 |
| Boutique hotel | 19% | +4 |

TRANSPORT TO THE DESTINATION

| | | |
|--------------------|-----|----|
| Car | 51% | +5 |
| Aeroplane | 36% | -1 |
| Motorhome (camper) | 1% | +0 |
| Motorcycle | 1% | +0 |
| Coach | 8% | -2 |

TRANSPORT AT THE DESTINATION

| | | |
|------------|------------|-----------|
| <u>Car</u> | 83% | +8 |
| Coach | 25% | +1 |
| Bicycle | 6% | +0 |
| Motorcycle | 6% | +1 |
| Train | 18% | +0 |

ACTIVITIES

| | | |
|--|------------|------------|
| <u>Sightseeing of old town centres</u> | 70% | +16 |
| Sun and sea | 70% | +8 |
| History and castles | 60% | +10 |
| <u>Sports activities</u> | 40% | +12 |
| Sightseeing of a town, the capital | 54% | +6 |

MOTIVATION

| | | |
|---------------------------------|------------|------------|
| <u>Articles on the Internet</u> | 41% | +9 |
| <u>Travel literature</u> | 30% | +12 |
| Past experience | 58% | +7 |
| <u>Videos on the Internet</u> | 28% | +7 |
| Price of the destination | 33% | +5 |

SOURCE OF INFORMATION

| | | |
|---------------------------------|------------|------------|
| <u>Articles on the Internet</u> | 66% | +11 |
| <u>Blogs</u> | 40% | +9 |
| <u>Travel literature</u> | 29% | +10 |
| <u>Web portals</u> | 36% | +7 |
| <u>Friends, family</u> | 53% | +1 |

RESERVATION METHOD

| | | |
|---|------------|------------|
| <u>Booking.com</u> | 69% | +20 |
| <u>Directly at the accommodation provider</u> | 37% | +7 |
| <u>Airbnb</u> | 21% | +8 |
| Expedia.com | 8% | +2 |
| Agency | 30% | -5 |

TRAVELLING WITH

| | | |
|-------------|-----|----|
| Family | 45% | +3 |
| As a couple | 37% | +1 |
| Friends | 13% | -3 |
| Alone | 4% | -1 |
| Relatives | 1% | +0 |

CHARACTERISTICS:

| | |
|--------|----------------|
| Size* | 218.462 |
| Share* | 3% |
| Age | 40 |
| Women | 37% |

| | |
|---------------|------------|
| Summer | 82% |
| Autumn | 7% |
| Shorter trips | 3 |
| Longer trips | 1 |

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. .

HUNGARY: Green explorers (18,4%)



DESTINATION TYPE

| | | |
|--|------------|------------|
| <u>In the mountains</u> | 73% | +24 |
| <u>Elsewhere in nature</u> | 61% | +22 |
| <u>Cultural and historical centres</u> | 51% | +22 |
| <u>By the sea</u> | 85% | +13 |
| <u>By a lake</u> | 57% | +15 |

TYPES OF ACCOMMODATION

| | | |
|--|------------|------------|
| <u>Apartment</u> | 87% | +20 |
| <u>Private accommodation (e.g. Airbnb)</u> | 35% | +5 |
| <u>Camp</u> | 33% | +6 |
| Staying with relatives or friends | 35% | +4 |
| <u>Hostel</u> | 33% | +3 |

TRANSPORT TO THE DESTINATION

| | | |
|--------------|------------|------------|
| <u>Car</u> | 57% | +10 |
| <u>Train</u> | 6% | +2 |
| Motorcycle | 0% | +0 |
| Coach | 8% | -3 |
| Aeroplane | 29% | -7 |

TRANSPORT AT THE DESTINATION

| | | |
|----------------|------------|-----------|
| <u>Car</u> | 79% | +4 |
| <u>Train</u> | 24% | +7 |
| Coach | 26% | +2 |
| <u>On foot</u> | 15% | +4 |
| Bicycle | 6% | +0 |

ACTIVITIES

| | | |
|---|------------|------------|
| <u>Sightseeing of old town centres</u> | 80% | +26 |
| <u>Natural sights, nature</u> | 66% | +20 |
| <u>Sightseeing of a town, the capital</u> | 66% | +19 |
| <u>Sun and sea</u> | 71% | +9 |
| <u>Sports activities</u> | 45% | +17 |

MOTIVATION

| | | |
|--|------------|------------|
| <u>Recommendations from friends</u> | 60% | +6 |
| <u>Price of the destination</u> | 35% | +6 |
| <u>Posts on social media, blogs</u> | 23% | +6 |
| <u>Suitability of the destination in all seasons</u> | 23% | +10 |
| <u>Articles on the Internet</u> | 38% | +5 |

SOURCE OF INFORMATION

| | | |
|---------------------------------|------------|------------|
| <u>Articles on the Internet</u> | 68% | +13 |
| <u>Blogs</u> | 40% | +9 |
| <u>Web forums</u> | 39% | +9 |
| <u>Opinions in social media</u> | 35% | +7 |
| Friends, family | 56% | +3 |

RESERVATION METHOD

| | | |
|---|------------|------------|
| <u>Booking.com</u> | 59% | +10 |
| <u>Directly at the accommodation provider</u> | 34% | +4 |
| <u>Airbnb</u> | 15% | +2 |
| Other web portal | 5% | +2 |
| Organiser | 10% | -1 |

TRAVELLING WITH

| | | |
|------------------|-----------|-----------|
| Family | 41% | -1 |
| Friends | 16% | +0 |
| <u>Alone</u> | 6% | +1 |
| <u>Relatives</u> | 2% | +1 |
| As a couple | 34% | -2 |

CHARACTERISTICS:

| | |
|--------|----------------|
| Size* | 309.499 |
| Share* | 5% |
| Age | 40 |
| Women | 41% |

| | |
|---------------|------------|
| Summer | 78% |
| Autumn | 12% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Urban consumers (14,1%)



DESTINATION TYPE

| | | |
|-------------------------|-----|-----|
| Towns | 59% | +28 |
| Capitals | 30% | +9 |
| By the sea | 63% | -9 |
| In the mountains | 39% | -10 |
| Spas (wellness and spa) | 21% | -4 |

TYPES OF
ACCOMMODATION

| | | |
|-----------------------------------|-----|-----|
| Hotel | 87% | +16 |
| Staying with relatives or friends | 31% | +1 |
| Apartment | 66% | -2 |
| Own accommodation | 14% | +2 |
| Hostel | 27% | -3 |

TRANSPORT TO THE
DESTINATION

| | | |
|------------------------|-----|----|
| Aeroplane | 45% | +8 |
| Coach | 12% | +2 |
| Motorhome (camper) | 1% | -1 |
| Ship or another vessel | 1% | +0 |
| Car | 39% | -8 |

TRANSPORT AT THE
DESTINATION

| | | |
|---------|-----|----|
| Coach | 30% | +6 |
| Car | 74% | +0 |
| On foot | 12% | +1 |
| Train | 17% | +0 |
| Bicycle | 6% | +0 |

ACTIVITIES

| | | |
|------------------------------------|-----|-----|
| Shopping | 59% | +31 |
| Wellness and spa | 61% | +22 |
| Sightseeing of a town, the capital | 64% | +17 |
| Gastronomy | 59% | +20 |
| Social events, festivals | 52% | +22 |

MOTIVATION

| | | |
|-------------------------------|-----|----|
| Articles on the Internet | 37% | +5 |
| Recommendations from friends | 57% | +2 |
| Videos on the Internet | 28% | +6 |
| Past experience | 51% | +0 |
| Popularity of the destination | 21% | +2 |

SOURCE OF
INFORMATION

| | | |
|--------------------------------|-----|----|
| Friends, family | 57% | +5 |
| Opinions in social media | 28% | +0 |
| Blogs | 30% | -2 |
| Agencies | 19% | +1 |
| Web portals (TripAdvisor etc.) | 27% | -1 |

RESERVATION METHOD

| | | |
|--------------------------|-----|----|
| Booking.com | 53% | +4 |
| At the activity provider | 11% | +4 |
| Agency | 35% | +0 |
| Expedia.com | 7% | +1 |
| Through official TICs | 5% | +1 |

TRAVELLING WITH

| | | |
|-------------|-----|----|
| As a couple | 40% | +4 |
| Friends | 21% | +5 |
| Family | 36% | -7 |
| Alone | 4% | -1 |

CHARACTERISTICS:

| | |
|--------|---------|
| Size* | 238.054 |
| Share* | 4% |
| Age | 36 |
| Women | 46% |

| | |
|---------------|-----|
| Summer | 81% |
| Autumn | 7% |
| Shorter trips | 3 |
| Longer trips | 1 |

NOTES:

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

HUNGARY: Beauty and indulgence lovers (13,8



DESTINATION TYPE

| | | |
|---------------------------------|-----|-----|
| By the sea | 93% | +21 |
| Spas (wellness and spa) | 59% | +34 |
| By a lake | 42% | +0 |
| Cultural and historical centres | 16% | -12 |
| Health resorts | 13% | +3 |

TYPES OF ACCOMMODATION

| | | |
|-------------------------------------|-----|-----|
| Hotel | 86% | +14 |
| Staying with relatives or friends | 35% | +4 |
| Private accommodation (e.g. Airbnb) | 30% | +1 |
| Apartment | 66% | -2 |
| Own accommodation | 13% | +1 |

TRANSPORT TO THE DESTINATION

| | | |
|------------------------|-----|----|
| Car | 49% | +3 |
| Aeroplane | 39% | +2 |
| Ship or another vessel | 1% | +0 |
| Train | 3% | +0 |
| Motorcycle | 1% | +0 |

TRANSPORT AT THE DESTINATION

| | | |
|------------|-----|----|
| Car | 81% | +7 |
| Train | 15% | -2 |
| Bicycle | 4% | -1 |
| Motorcycle | 4% | -1 |
| Coach | 17% | -7 |

ACTIVITIES

| | | |
|--------------------------|-----|-----|
| Sun and sea | 84% | +23 |
| Wellness and spa | 72% | +33 |
| Aquafun, amusement parks | 49% | +15 |
| Gastronomy | 44% | +5 |
| Shopping | 37% | +9 |

MOTIVATION

| | | |
|-------------------------------|-----|----|
| Past experience | 58% | +7 |
| Price of the destination | 33% | +5 |
| Recommendations from friends | 57% | +3 |
| Popularity of the destination | 21% | +3 |
| Web ads | 18% | +1 |

SOURCE OF INFORMATION

| | | |
|--------------------------------|-----|----|
| Web forums | 31% | +1 |
| Friends, family | 51% | -1 |
| Web portals (TripAdvisor etc.) | 28% | -1 |
| Agencies | 22% | +3 |
| Articles on the Internet | 52% | -3 |

RESERVATION METHOD

| | | |
|--|-----|----|
| Agency | 43% | +8 |
| Directly at the accommodation provider | 35% | +5 |
| Booking.com | 48% | -1 |
| Organiser | 11% | -1 |
| Own accommodation | 5% | +0 |

TRAVELLING WITH

| | | |
|-------------|-----|-----|
| Family | 60% | +17 |
| As a couple | 29% | -7 |
| Alone | 4% | -1 |
| Relatives | 1% | +0 |
| Friends | 7% | -9 |

CHARACTERISTICS:

| | |
|--------|---------|
| Size* | 233.024 |
| Share* | 4% |
| Age | 40 |
| Women | 47% |

| | |
|---------------|-----|
| Summer | 82% |
| Autumn | 9% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Forever young (13,2%)



DESTINATION TYPE

| | | |
|---------------------------------|-----|-----|
| By the sea | 70% | -2 |
| Cultural and historical centres | 30% | +2 |
| By a lake | 33% | -8 |
| In the mountains | 39% | -10 |
| Spas (wellness and spa) | 21% | -4 |

TYPES OF
ACCOMMODATION

| | | |
|-------------------------------------|------------|-----------|
| Hotel | 80% | +9 |
| Private accommodation (e.g. Airbnb) | 30% | +0 |
| Camp | 27% | +0 |
| Camper | 18% | +2 |
| Apartment | 64% | -4 |

TRANSPORT TO THE
DESTINATION

| | | |
|----------------|------------|-----------|
| Coach | 16% | +6 |
| Car | 46% | -1 |
| Train | 3% | +0 |
| Bicycle | 1% | +1 |
| Aeroplane | 32% | -4 |

TRANSPORT AT THE
DESTINATION

| | | |
|---------|-----|----|
| Coach | 25% | +0 |
| Car | 71% | -4 |
| Train | 15% | -2 |
| Bicycle | 5% | +0 |
| On foot | 8% | -2 |

ACTIVITIES

| | | |
|---|------------|------------|
| History and castles | 77% | +27 |
| <u>Sightseeing of old town centres</u> | 75% | +22 |
| Touring | 51% | +26 |
| Thermal health spa | 52% | +19 |
| <u>Sightseeing of a town, the capital</u> | 60% | +13 |

MOTIVATION

| | | |
|-------------------------------|-----|-----------|
| TV programmes | 25% | +6 |
| Travel literature | 22% | +4 |
| Articles on the Internet | 33% | +1 |
| Past experience | 48% | -3 |
| Popularity of the destination | 19% | +1 |

SOURCE OF
INFORMATION

| | | |
|---------------------------------|------------|------------|
| Web portals (TripAdvisor etc.) | 38% | +10 |
| <u>Articles on the Internet</u> | 60% | +4 |
| Agencies | 26% | +8 |
| <u>Web forums</u> | 33% | +3 |
| Friends, family | 48% | -4 |

RESERVATION METHOD

| | | |
|-------------------|-----|------------|
| Agency | 47% | +12 |
| Agoda.com | 5% | +0 |
| Booking.com | 44% | -5 |
| Organiser | 10% | -2 |
| Own accommodation | 4% | -1 |

TRAVELLING WITH

| | | |
|-------------|-----|-----------|
| As a couple | 43% | +8 |
| Family | 41% | -2 |
| Alone | 4% | -1 |
| Friends | 12% | -4 |
| Relatives | 0% | -1 |

CHARACTERISTICS:

| | |
|--------|----------------|
| Size* | 223.221 |
| Share* | 3% |
| Age | 43 |
| Women | 42% |

| | |
|---------------|------------|
| Summer | 87% |
| Autumn | 6% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Relaxed escapists (6,9%)



DESTINATION TYPE

| | | |
|---------------------|-----|-----|
| Countryside | 19% | -3 |
| By a lake | 30% | -12 |
| By the sea | 58% | -14 |
| Towns | 23% | -8 |
| Elsewhere in nature | 25% | -14 |

TYPES OF
ACCOMMODATION

| | | |
|--------------------------------------|-----|----|
| Hotel | 75% | +3 |
| Staying with relatives or friends | 28% | -3 |
| Boutique hotel | 15% | +0 |
| Hostel | 26% | -4 |
| Tourist farm | 10% | +0 |

TRANSPORT TO THE
DESTINATION

| | | |
|-------------------------------|------------|-----------|
| <u>Ship or another vessel</u> | <u>3%</u> | <u>+2</u> |
| Car | 42% | -5 |
| <u>Aeroplane</u> | <u>41%</u> | <u>+5</u> |
| <u>Motorhome (camper)</u> | <u>3%</u> | <u>+1</u> |
| <u>Motorcycle</u> | <u>3%</u> | <u>+2</u> |

TRANSPORT AT THE
DESTINATION

| | | |
|---------------------------|-----------|-----------|
| Car | 71% | -4 |
| Coach | 24% | +0 |
| <u>Motorhome (camper)</u> | <u>7%</u> | <u>+4</u> |
| Train | 12% | -6 |
| Motorcycle | 4% | +0 |

ACTIVITIES

| | | |
|---|------------|------------|
| Natural sights, nature | 63% | +17 |
| Thermal health spa | 47% | +13 |
| Sightseeing of a town, the capital | 51% | +4 |
| <u>Selfness, digital-detox ipd.</u> | <u>28%</u> | <u>+18</u> |
| Gastronomy | 42% | +2 |

MOTIVATION

| | | |
|---------------------------------|-----|----|
| Posts on social media, blogs | 20% | +2 |
| Web ads | 18% | +1 |
| Articles on the Internet | 27% | -6 |
| Recommendations from friends | 47% | -8 |
| TV ads | 10% | +5 |

SOURCE OF
INFORMATION

| | | |
|--------------------------|-----|-----|
| Opinions in social media | 30% | +2 |
| Friends, family | 48% | -4 |
| Travel presentations | 15% | +5 |
| Web forums | 23% | -7 |
| Articles on the Internet | 44% | -11 |

RESERVATION METHOD

| | | |
|-----------------------|------------|-----------|
| <u>Expedia.com</u> | <u>12%</u> | <u>+6</u> |
| <u>Airbnb</u> | <u>18%</u> | <u>+5</u> |
| <u>Agoda.com</u> | <u>10%</u> | <u>+4</u> |
| Through official TICs | 9% | +4 |
| Booking.com | 46% | -3 |

TRAVELLING WITH

| | | |
|------------------|-----------|-----------|
| Friends | 17% | +2 |
| Family | 39% | -3 |
| As a couple | 34% | -1 |
| <u>Relatives</u> | <u>4%</u> | <u>+2</u> |
| Alone | 5% | +0 |

CHARACTERISTICS:

| | |
|--------|----------------|
| Size* | 115.790 |
| Share* | 2% |
| Age | 38 |
| Women | 37% |

| | |
|---------------|------------|
| Summer | 74% |
| Autumn | 13% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Active families (6,2%)



DESTINATION TYPE

| | | |
|---------------------|-----|-----|
| In the mountains | 79% | +30 |
| Elsewhere in nature | 68% | +30 |
| By the sea | 68% | -4 |
| By a lake | 52% | +10 |
| Countryside | 18% | -4 |

TYPES OF
ACCOMMODATION

| | | |
|--------------------------------------|-----|-----|
| Apartment | 86% | +18 |
| Hostel | 37% | +7 |
| Camp | 32% | +5 |
| Staying with relatives or friends | 33% | +3 |
| Camper | 18% | +2 |

TRANSPORT TO THE
DESTINATION

| | | |
|--------------------|-----|----|
| Car | 55% | +9 |
| Motorhome (camper) | 3% | +2 |
| Train | 3% | +0 |
| Bicycle | 1% | +1 |
| Aeroplane | 30% | -7 |

TRANSPORT AT THE
DESTINATION

| | | |
|--------------------|-----|----|
| Car | 75% | +0 |
| Bicycle | 13% | +8 |
| On foot | 14% | +3 |
| Motorhome (camper) | 7% | +3 |
| Coach | 16% | -8 |

ACTIVITIES

| | | |
|--|-----|-----|
| Sports activities | 58% | +30 |
| Mountaineering (more challenging tours) | 49% | +35 |
| Water sports activities | 42% | +22 |
| Natural sights, nature | 52% | +6 |
| Touring | 39% | +14 |

MOTIVATION

| | | |
|--|-----|----|
| Past experience | 58% | +8 |
| Videos on the Internet | 27% | +6 |
| Suitability of the destination in all seasons | 19% | +6 |
| Recommendations from friends | 55% | +0 |
| TV programmes | 23% | +4 |

SOURCE OF
INFORMATION

| | | |
|--------------------------|-----|----|
| Articles on the Internet | 55% | +0 |
| Blogs | 33% | +1 |
| Travel literature | 27% | +8 |
| Web forums | 27% | -3 |
| Travel presentations | 15% | +5 |

RESERVATION METHOD

| | | |
|---|-----|-----|
| Directly at the accommodation provider | 43% | +13 |
| Booking.com | 54% | +4 |
| At the activity provider | 10% | +3 |
| Agency | 36% | +1 |
| Organiser | 14% | +2 |

TRAVELLING WITH

| | | |
|-------------|-----|-----|
| As a couple | 55% | +19 |
| Alone | 5% | +0 |
| Family | 29% | -14 |
| Friends | 11% | -4 |

CHARACTERISTICS:

| | |
|--------|---------|
| Size* | 104.719 |
| Share* | 2% |
| Age | 41 |
| Women | 37% |

| | |
|---------------|-----|
| Summer | 79% |
| Autumn | 9% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Sociable foodies (5,6%)



DESTINATION TYPE

| | | |
|---------------------------------|------------|------------|
| Cultural and historical centres | 72% | +43 |
| Elsewhere in nature | 70% | +31 |
| Capitals | 54% | +32 |
| By the sea | 84% | +12 |
| Towns | 54% | +22 |

TYPES OF ACCOMMODATION

| | | |
|-------------------------------------|------------|------------|
| Hotel | 92% | +21 |
| Boutique hotel | 45% | +31 |
| Apartment | 80% | +12 |
| Private accommodation (e.g. Airbnb) | 43% | +13 |
| Hostel | 35% | +5 |

TRANSPORT TO THE DESTINATION

| | | |
|------------|------------|-----------|
| Car | 52% | +5 |
| Aeroplane | 40% | +3 |
| Motorcycle | 1% | +0 |
| Train | 2% | -1 |
| Coach | 5% | -5 |

TRANSPORT AT THE DESTINATION

| | | |
|---------|------------|------------|
| Car | 87% | +12 |
| Train | 29% | +11 |
| Coach | 35% | +11 |
| On foot | 18% | +8 |
| Bicycle | 6% | +0 |

ACTIVITIES

| | | |
|------------------------------------|------------|------------|
| History and castles | 95% | +46 |
| Seeing major tourist attractions | 79% | +43 |
| Sightseeing of a town, the capital | 81% | +33 |
| Sightseeing of old town centres | 86% | +32 |
| Aquafun, amusement parks | 72% | +38 |

MOTIVATION

| | | |
|-------------------------------|------------|------------|
| TV programmes | 39% | +19 |
| Recommendations from friends | 71% | +16 |
| Articles on the Internet | 48% | +16 |
| Popularity of the destination | 32% | +13 |
| Price of the destination | 43% | +14 |

SOURCE OF INFORMATION

| | | |
|--------------------------|------------|------------|
| Articles on the Internet | 80% | +25 |
| Opinions in social media | 52% | +24 |
| Blogs | 49% | +17 |
| Articles in print media | 31% | +18 |
| Friends, family | 62% | +10 |

RESERVATION METHOD

| | | |
|--|------------|------------|
| Booking.com | 63% | +14 |
| Directly at the accommodation provider | 50% | +20 |
| Airbnb | 21% | +8 |
| Agency | 42% | +7 |
| Organiser | 17% | +5 |

TRAVELLING WITH

| | | |
|-------------|------------|------------|
| Family | 62% | +20 |
| Alone | 3% | -2 |
| As a couple | 25% | -11 |
| Friends | 10% | -5 |

CHARACTERISTICS:

| | |
|--------|---------------|
| Size* | 94.418 |
| Share* | 1% |
| Age | 38 |
| Women | 44% |

| | |
|---------------|------------|
| Summer | 78% |
| Autumn | 15% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Devoted mothers (5,1%)



DESTINATION TYPE

| | | |
|-------------------------|------------|------------|
| <u>In the mountains</u> | 63% | +14 |
| By a lake | 38% | -4 |
| <u>Countryside</u> | 31% | +9 |
| By the sea | 53% | -19 |
| Elsewhere in nature | 23% | -15 |

TYPES OF
ACCOMMODATION

| | | |
|--|------------|------------|
| <u>Tourist farm</u> | 32% | +22 |
| Apartment | 70% | +2 |
| Private accommodation (e.g. Airbnb) | 34% | +4 |
| <u>Camper</u> | 25% | +9 |
| Staying with relatives or friends | 31% | +1 |

TRANSPORT TO THE
DESTINATION

| | | |
|--------------|------------|-----------|
| Car | 46% | -1 |
| <u>Coach</u> | 14% | +4 |
| <u>Train</u> | 6% | +2 |
| Motorcycle | 1% | +1 |
| Aeroplane | 31% | -5 |

TRANSPORT AT THE
DESTINATION

| | | |
|---------------------------|-----------|-----------|
| <u>Motorhome (camper)</u> | 8% | +4 |
| Car | 67% | -8 |
| Coach | 21% | -3 |
| Motorcycle | 5% | +1 |
| Train | 11% | -7 |

ACTIVITIES

| | | |
|--|------------|------------|
| Natural sights, nature | 48% | +2 |
| <u>Sports activities</u> | 33% | +6 |
| <u>Countryside, farm activities</u> | 27% | +19 |
| <u>Activities and fun for children</u> | 21% | +9 |
| Learning about the local way of life | 24% | +3 |

MOTIVATION

| | | |
|---------------------------------|-----|----|
| Recommendations from friends | 47% | -8 |
| Travel literature | 16% | -1 |
| Web ads | 15% | -2 |
| Price of the destination | 22% | -7 |
| Travel presentations | 8% | +1 |

SOURCE OF
INFORMATION

| | | |
|--------------------------|-----|----|
| Friends, family | 51% | -1 |
| Opinions in social media | 32% | +4 |
| Travel literature | 16% | -3 |
| Agencies | 15% | -3 |
| Blogs | 25% | -7 |

RESERVATION METHOD

| | | |
|--------------------------|------------|-----------|
| <u>Own accommodation</u> | 11% | +6 |
| Organiser | 13% | +2 |
| <u>Expedia.com</u> | 9% | +3 |
| Agency | 29% | -6 |
| Booking.com | 36% | -13 |

TRAVELLING WITH

| | | |
|--------------------|------------|-----------|
| <u>As a couple</u> | 43% | +7 |
| <u>Alone</u> | 9% | +4 |
| Family | 35% | -7 |
| Friends | 12% | -4 |
| Relatives | 1% | +0 |

CHARACTERISTICS:

| | |
|--------|---------------|
| Size* | 85.621 |
| Share* | 1% |
| Age | 42 |
| Women | 40% |

| | |
|---------------|------------|
| Summer | 77% |
| Autumn | 12% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Active nostalgists (5,0%)



DESTINATION TYPE

| | | |
|---------------------|-----|-----|
| In the mountains | 67% | +19 |
| Elsewhere in nature | 60% | +22 |
| By a lake | 53% | +11 |
| Countryside | 25% | +2 |
| By the sea | 54% | -18 |

TYPES OF
ACCOMMODATION

| | | |
|--|-----|-----|
| Hotel | 71% | -1 |
| Boutique hotel | 25% | +10 |
| Camp | 30% | +3 |
| Private accommodation (e.g. Airbnb) | 26% | -3 |
| Tourist farm | 15% | +4 |

TRANSPORT TO THE
DESTINATION

| | | |
|--------------------|-----|----|
| Aeroplane | 38% | +2 |
| Motorhome (camper) | 4% | +3 |
| Coach | 15% | +5 |
| Bicycle | 2% | +1 |
| Car | 38% | -9 |

TRANSPORT AT THE
DESTINATION

| | | |
|------------|-----|----|
| Coach | 30% | +6 |
| Motorcycle | 8% | +4 |
| Car | 70% | -5 |
| On foot | 10% | +0 |
| Train | 15% | -3 |

ACTIVITIES

| | | |
|------------------------|-----|-----|
| Sports activities | 46% | +18 |
| Visit to a wine cellar | 40% | +21 |
| Natural sights, nature | 55% | +9 |
| Gastronomy | 50% | +10 |
| History and castles | 53% | +4 |

MOTIVATION

| | | |
|---|-----|----|
| Travel literature | 20% | +2 |
| Videos on the Internet | 22% | +1 |
| Web ads | 19% | +2 |
| Suitability of the destination in all seasons | 15% | +2 |
| Articles on the Internet | 30% | -2 |

SOURCE OF
INFORMATION

| | | |
|-----------------------------|-----|----|
| Friends, family | 54% | +2 |
| Articles on the Internet | 54% | -1 |
| Travel literature | 19% | +0 |
| Blogs | 27% | -5 |
| Web forums | 27% | -3 |

RESERVATION METHOD

| | | |
|--|-----|----|
| Organiser | 16% | +5 |
| Agoda.com | 11% | +6 |
| Own accommodation | 9% | +4 |
| Agency | 30% | -5 |
| Directly at the accommodation provider | 26% | -4 |

TRAVELLING WITH

| | | |
|-------------|-----|-----|
| As a couple | 34% | -2 |
| Friends | 27% | +12 |
| Alone | 8% | +3 |
| Family | 31% | -12 |

CHARACTERISTICS:

| | |
|--------|--------|
| Size* | 84.264 |
| Share* | 1% |
| Age | 37 |
| Women | 33% |

| | |
|---------------|-----|
| Summer | 76% |
| Autumn | 11% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Adventurists (4,7%)



DESTINATION TYPE

| | | |
|---------------------|-----|-----|
| By a lake | 62% | +20 |
| In the mountains | 65% | +16 |
| Elsewhere in nature | 59% | +20 |
| Countryside | 28% | +6 |
| By the sea | 49% | -23 |

TYPES OF
ACCOMMODATION

| | | |
|-------------------------------------|-----|----|
| Staying with relatives or friends | 32% | +2 |
| Camp | 28% | +1 |
| Tourist farm | 13% | +2 |
| Private accommodation (e.g. Airbnb) | 28% | -2 |
| Glamping | 7% | +2 |

TRANSPORT TO THE
DESTINATION

| | | |
|--------------------|-----------|-----------|
| Car | 47% | +0 |
| Coach | 14% | +3 |
| <u>Motorcycle</u> | <u>3%</u> | <u>+2</u> |
| Aeroplane | 35% | -2 |
| Motorhome (camper) | 1% | +0 |

TRANSPORT AT THE
DESTINATION

| | | |
|---------------------------|------------|------------|
| <u>Motorhome (camper)</u> | <u>13%</u> | <u>+10</u> |
| Car | 71% | -4 |
| On foot | 12% | +2 |
| Motorcycle | 7% | +3 |
| Train | 12% | -6 |

ACTIVITIES

| | | |
|--|------------|------------|
| History and castles | 68% | +19 |
| <u>Mountaineering (more challenging tours)</u> | <u>43%</u> | <u>+28</u> |
| <u>Water sports activities</u> | <u>30%</u> | <u>+10</u> |
| Natural sights, nature | 42% | -3 |
| Museums, galleries and art | 29% | -3 |

MOTIVATION

| | | |
|------------------------------|-----|----|
| Recommendations from friends | 53% | -1 |
| Videos on the Internet | 25% | +4 |
| Web ads | 14% | -3 |
| Articles in print media | 14% | -1 |
| Price of the destination | 23% | -5 |

SOURCE OF
INFORMATION

| | | |
|-------------------------|-----|----|
| Friends, family | 52% | +0 |
| Web forums | 29% | -1 |
| Articles in print media | 17% | +3 |
| Blogs | 23% | -9 |
| Travel presentations | 11% | +1 |

RESERVATION METHOD

| | | |
|--------------------------|------------|-----------|
| <u>Own accommodation</u> | <u>11%</u> | <u>+6</u> |
| <u>Airbnb</u> | <u>17%</u> | <u>+4</u> |
| <u>Agoda.com</u> | <u>11%</u> | <u>+5</u> |
| Organiser | 14% | +2 |
| <u>Expedia.com</u> | <u>10%</u> | <u>+4</u> |

TRAVELLING WITH

| | | |
|-------------|-----|----|
| As a couple | 39% | +3 |
| Family | 42% | +0 |
| Friends | 14% | -2 |
| Relatives | 2% | +0 |
| Alone | 4% | -1 |

CHARACTERISTICS:

| | |
|--------|--------|
| Size* | 78.715 |
| Share* | 1% |
| Age | 37 |
| Women | 38% |

| | |
|---------------|-----|
| Summer | 64% |
| Autumn | 15% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: Carefree youth (4,0%)



DESTINATION TYPE

| | | |
|-------------------|------------|------------|
| <u>By the sea</u> | 85% | +13 |
| <u>Towns</u> | 55% | +24 |
| By a lake | 34% | -8 |
| <u>Capitals</u> | 30% | +9 |
| Countryside | 16% | -7 |

TYPES OF
ACCOMMODATION

| | | |
|-----------------|------------|------------|
| <u>Hostel</u> | 68% | +39 |
| <u>Camp</u> | 45% | +18 |
| <u>Camper</u> | 29% | +12 |
| <u>Glamping</u> | 14% | +9 |
| Apartment | 56% | -12 |

TRANSPORT TO THE
DESTINATION

| | | |
|-------------------------------|------------|-----------|
| <u>Train</u> | 7% | +4 |
| <u>Ship or another vessel</u> | 3% | +3 |
| Aeroplane | 37% | +0 |
| <u>Coach</u> | 14% | +4 |
| <u>Motorcycle</u> | 3% | +2 |

TRANSPORT AT THE
DESTINATION

| | | |
|---------------------------|------------|-----------|
| <u>Coach</u> | 32% | +7 |
| <u>Motorhome (camper)</u> | 9% | +5 |
| Car | 65% | -10 |
| Train | 17% | +0 |
| On foot | 10% | +0 |

ACTIVITIES

| | | |
|-------------------------------------|------------|------------|
| <u>Music festivals and concerts</u> | 51% | +27 |
| <u>Nightlife (bars, clubs)</u> | 47% | +27 |
| <u>Social events, festivals</u> | 44% | +14 |
| Seeing major tourist attractions | 36% | +0 |
| Sun and sea | 55% | -7 |

MOTIVATION

| | | |
|------------------------------|-----|----|
| Proximity of the destination | 19% | +4 |
| Price of the destination | 27% | -2 |
| Recommendations from friends | 50% | -5 |
| Articles in print media | 16% | +1 |
| Travel literature | 16% | -2 |

SOURCE OF
INFORMATION

| | | |
|--------------------------|-----|----|
| Blogs | 33% | +1 |
| Opinions in social media | 29% | +1 |
| Articles on the Internet | 49% | -6 |
| Friends, family | 43% | -9 |
| Articles in print media | 10% | -3 |

RESERVATION METHOD

| | | |
|--|-----|----|
| Organiser | 16% | +4 |
| Expedia.com | 9% | +3 |
| Airbnb | 14% | +2 |
| Agency | 29% | -6 |
| Directly at the accommodation provider | 26% | -5 |

TRAVELLING WITH

| | | |
|------------------|------------|------------|
| <u>Friends</u> | 32% | +16 |
| Family | 39% | -3 |
| Alone | 7% | +2 |
| <u>Relatives</u> | 3% | +2 |
| As a couple | 18% | -17 |

CHARACTERISTICS:

| | |
|--------|---------------|
| Size* | 67.418 |
| Share* | 1% |
| Age | 33 |
| Women | 42% |

| | |
|---------------|------------|
| Summer | 81% |
| Autumn | 11% |
| Shorter trips | 4 |
| Longer trips | 1 |

HUNGARY: Urban conscious (3,1%)



DESTINATION TYPE

| | | |
|---------------------------------|-----|-----|
| Towns | 44% | +13 |
| Capitals | 42% | +20 |
| Cultural and historical centres | 39% | +10 |
| By the sea | 47% | -25 |
| Countryside | 20% | -2 |

TYPES OF ACCOMMODATION

| | | |
|-------------------------------------|-----|-----|
| Hostel | 68% | +38 |
| Private accommodation (e.g. Airbnb) | 37% | +7 |
| Boutique hotel | 27% | +13 |
| Staying with relatives or friends | 28% | -2 |
| Hotel | 52% | -19 |

TRANSPORT TO THE DESTINATION

| | | |
|--------------------|-----|-----|
| Aeroplane | 56% | +19 |
| Motorhome (camper) | 8% | +7 |
| Car | 28% | -19 |
| Coach | 7% | -3 |
| Train | 1% | -2 |

TRANSPORT AT THE DESTINATION

| | | |
|---------|-----|-----|
| Coach | 26% | +1 |
| Train | 21% | +3 |
| On foot | 19% | +9 |
| Car | 64% | -11 |
| Bicycle | 4% | -2 |

ACTIVITIES

| | | |
|--------------------------------------|-----|-----|
| Museums, galleries and art centres | 67% | +35 |
| Sightseeing of old town centres | 83% | +29 |
| Social events, festivals | 64% | +34 |
| Learning about the local way of life | 54% | +33 |
| Sightseeing of a town, the capital | 61% | +14 |

MOTIVATION

| | | |
|------------------------------|-----|----|
| Past experience | 55% | +4 |
| Videos on the Internet | 29% | +7 |
| Proximity of the destination | 22% | +7 |
| Articles on the Internet | 35% | +3 |
| Travel literature | 23% | +6 |

SOURCE OF INFORMATION

| | | |
|--------------------------------|-----|----|
| Blogs | 40% | +8 |
| Articles on the Internet | 56% | +1 |
| Friends, family | 50% | -2 |
| Web portals (TripAdvisor etc.) | 31% | +2 |
| Articles in print media | 21% | +7 |

RESERVATION METHOD

| | | |
|--|-----|-----|
| Airbnb | 27% | +14 |
| Directly at the accommodation provider | 37% | +6 |
| Expedia.com | 13% | +7 |
| Booking.com | 49% | +0 |
| Through official TICs | 9% | +4 |

TRAVELLING WITH

| | | |
|-------------|-----|-----|
| Friends | 27% | +11 |
| Family | 46% | +3 |
| Relatives | 3% | +1 |
| As a couple | 20% | -15 |
| Alone | 4% | +0 |

CHARACTERISTICS:

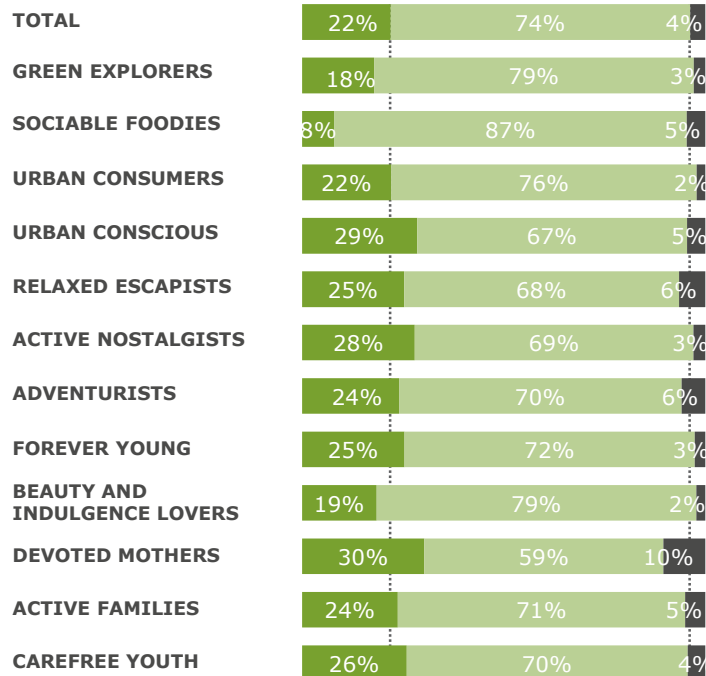
| | |
|--------|--------|
| Size* | 51.889 |
| Share* | 1% |
| Age | 39 |
| Women | 48% |

| | |
|---------------|-----|
| Summer | 72% |
| Autumn | 15% |
| Shorter trips | 3 |
| Longer trips | 1 |

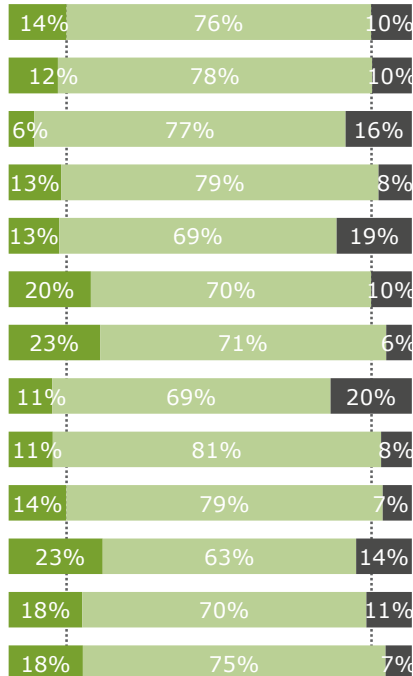
HUNGARY: Price sensitivity



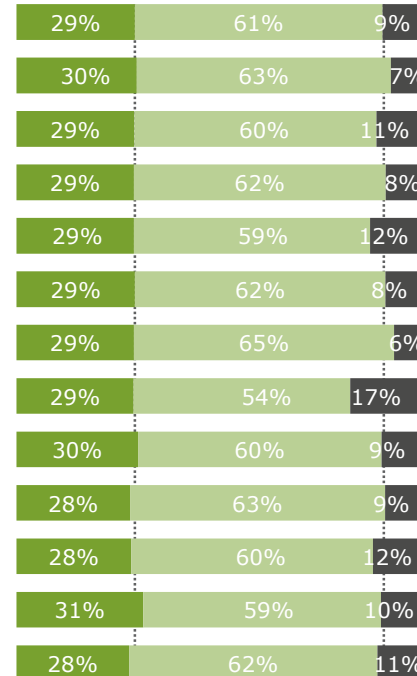
CHOICE OF ACCOMMODATION



CHOICE OF DESTINATION



CHOICE OF TRANSPORT

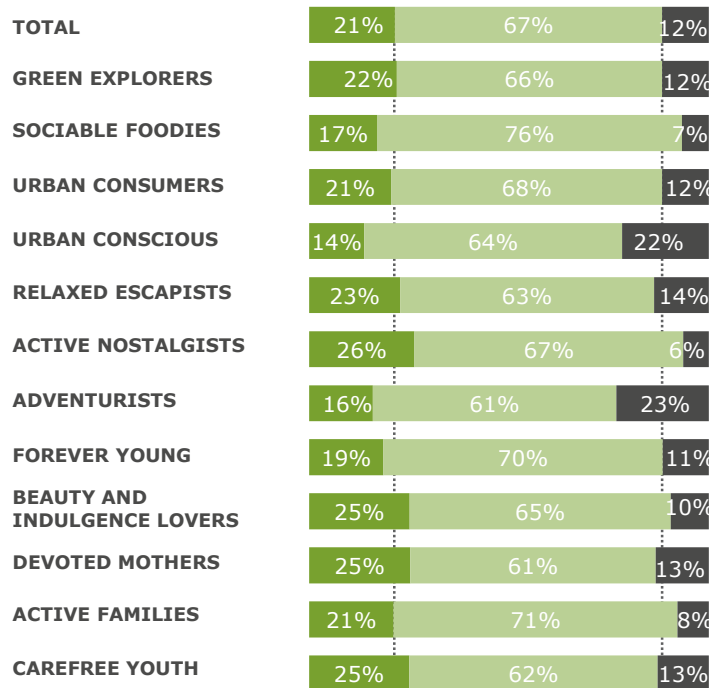


seek the most favourable offer
 assess value for money
 disregard the price

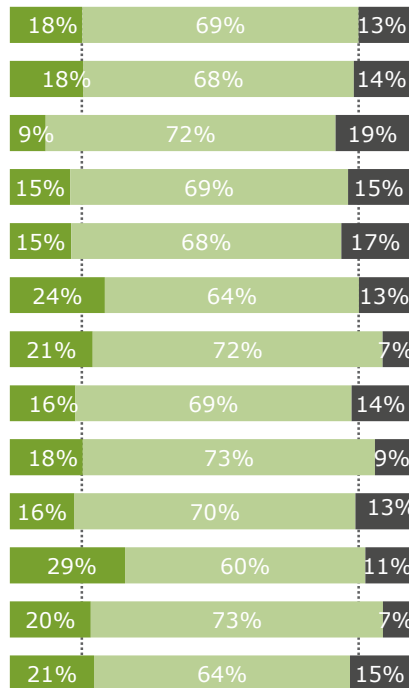
HUNGARY: Price sensitivity



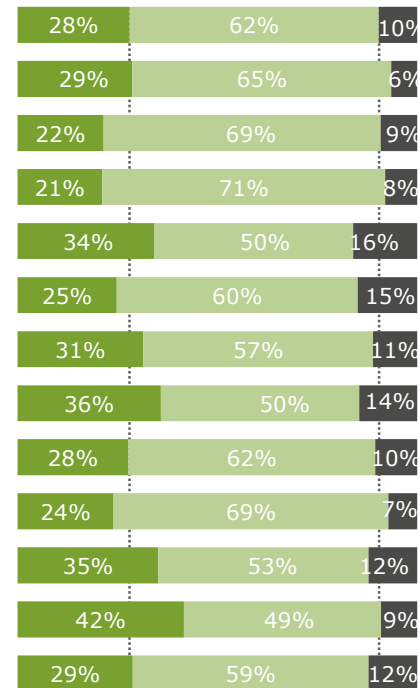
CHOICE OF ADDITIONAL ACTIVITIES



CHOICE OF FOOD



SHOPPING

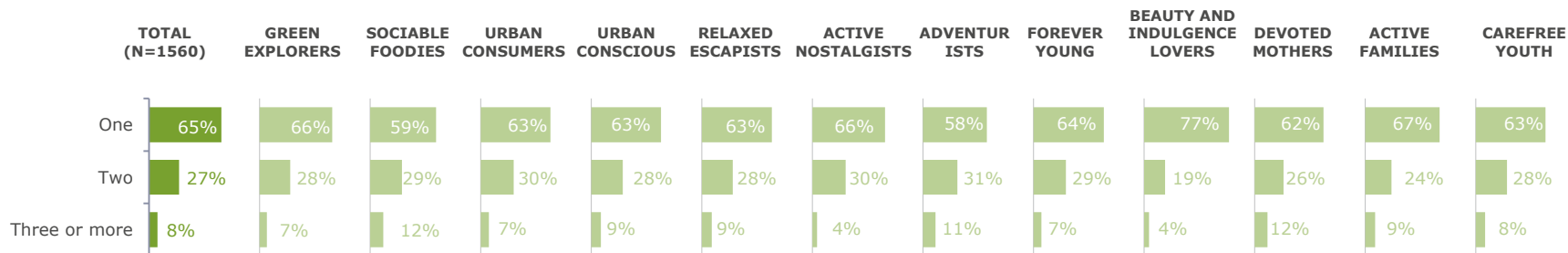


seek the most favourable offer
 assess value for money
 disregard the price

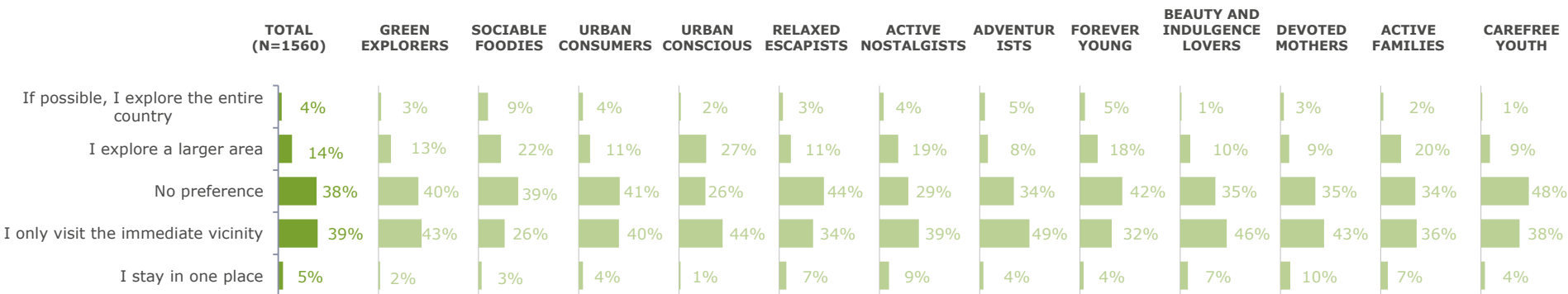
HUNGARY: Level of exploration



Number of countries visited during one trip, break or holiday



Exploring in one country



GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY



CHARACTERISTICS OF THE TARGET GROUP:

| | | | |
|--------|------------------|---------------|------------|
| Size* | 1.686.633 | Summer | 79% |
| Share* | 26,4% | Autumn | 10% |
| Age | 39 | Shorter trips | 3 |
| Women | 42% | Longer trips | 1 |

TRAVELLING WITH:

| | |
|-------------|------------|
| Family | 43% |
| As a couple | 36% |
| Friends | 16% |
| Alone | 5% |
| Relatives | 1% |

DESTINATION TYPE:

| | | |
|------------------|------------|-----|
| By the sea | 49% | 72% |
| In the mountains | 9% | 49% |
| By a lake | 5% | 42% |

4 x

a year
travels
abroad

ACTIVITIES - TOP 10:

| | |
|------------------------------------|------------|
| Sun and sea | 61% |
| Sightseeing of old town centres | 54% |
| History and castles | 50% |
| Sightseeing of a town, the capital | 48% |
| Natural parks, attractions | 46% |
| Gastronomic delights | 39% |
| Wellness and (beauty) spa | 39% |
| Tourist sights | 37% |
| Cruise | 36% |
| Aquafun, amusement parks | 35% |

TRAVEL MOTIVES - TOP 10:

| | | |
|--|------------|-----|
| Visit a beautiful destination | 19% | 49% |
| Rest, slow down the pace of life | 13% | 38% |
| Relaxation | 13% | 37% |
| To learn something new | 10% | 33% |
| Experience another culture | 7% | 24% |
| Spend time with family, strengthen the bonds | 9% | 23% |
| Enjoy good food, drinks | 2% | 21% |
| Retreat from the everyday | 3% | 18% |
| Spend time actively | 4% | 17% |
| Visit a town, the capital | 4% | 17% |

VISITING COUNTRIES - TOP 10:

| | | |
|--|------------|-----|
| Croatia | 33% | 45% |
| Germany | 26% | 41% |
| Italy | 32% | 41% |
| Austria | 28% | 40% |
| Greece | 28% | 37% |
| Hungary | 22% | 36% |
| Romania | 16% | 28% |
| Spain | 20% | 25% |
| Slovakia | 13% | 25% |
| United Kingdom of Great Britain and Northern Ireland | 17% | 24% |
| Slovenia | 8% | 13% |

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).

HUNGARY: Elements of the purchase journey and consumption



TYPES OF ACCOMMODATION:



Other frequent accommodation types:

Hostel: 30%

Private accommodation: 30%

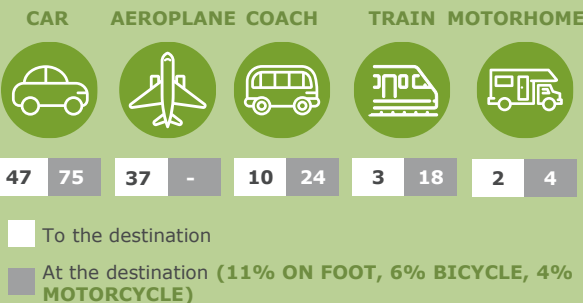
Camp: 27%

RESERVATION:

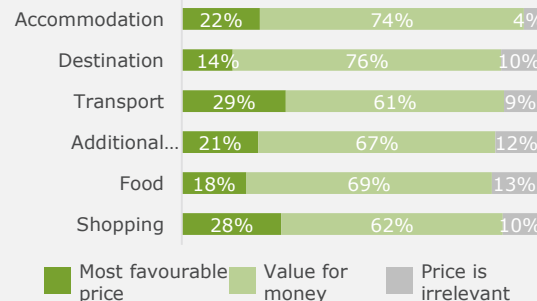
UP TO 3
months in
advance

75%

TRANSPORT MODE(%):

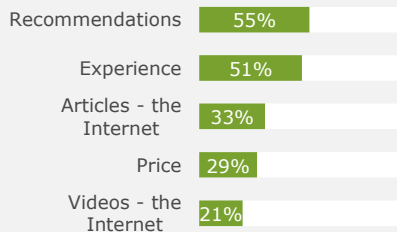


PRICE SENSITIVITY:

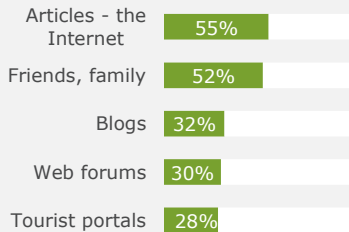


PURCHASE JOURNEY:

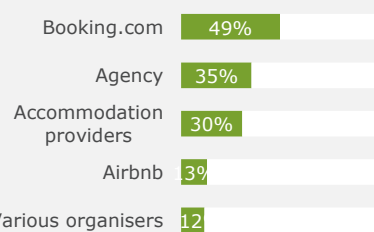
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

| | PLANNED COSTS | ACTUAL COSTS |
|--|---------------|--------------|
| ACCOMMODATION, FOOD and other per person/day | 44 € | 46 € |
| TRANSPORT MODE per person | 175 € | 188 € |

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* | 653.837 | Summer | 80% |
| Share* | 10,2% | Autumn | 8% |
| Age | 40 | Shorter trips | 3 |
| Women | 34% | Longer trips | 1 |

TRAVELLING WITH:

| | |
|-------------|------------|
| Family | 42% |
| As a couple | 39% |
| Friends | 15% |
| Alone | 4% |
| Relatives | 1% |

DESTINATION TYPE:

| | | |
|------------------|------------|-----|
| By the sea | 53% | 73% |
| In the mountains | 8% | 50% |
| By a lake | 5% | 42% |

4 x

a year
travels
abroad

ACTIVITIES - TOP 10:

| | |
|------------------------------------|------------|
| Sightseeing of old town centres | 60% |
| Sun and sea | 60% |
| History and castles | 50% |
| Sightseeing of a town, the capital | 48% |
| Natural parks, attractions | 46% |
| Wellness and (beauty) spa | 39% |
| Gastronomic delights | 38% |
| Tourist sights | 38% |
| Cruise | 35% |
| Museums, galleries, art | 34% |

TRAVEL MOTIVES - TOP 10:

| | | |
|--|------------|-----|
| Visit a beautiful destination | 19% | 47% |
| Relaxation | 13% | 35% |
| Rest, slow down the pace of life | 12% | 33% |
| To learn something new | 10% | 33% |
| Experience another culture | 7% | 24% |
| Spend time with family, strengthen the bonds | 8% | 22% |
| Enjoy good food, drinks | 2% | 20% |
| Contact with nature | 3% | 19% |
| Spend time actively | 5% | 19% |
| Visit a town, the capital | 5% | 19% |

VISITING COUNTRIES - TOP 10:

| | | |
|----------|------------|-----|
| Croatia | 42% | 59% |
| Germany | 33% | 52% |
| Austria | 37% | 52% |
| Italy | 41% | 52% |
| Greece | 35% | 46% |
| Hungary | 27% | 43% |
| Slovakia | 19% | 35% |
| Spain | 27% | 34% |
| Romania | 18% | 34% |
| France | 24% | 31% |
| Slovenia | 19% | 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).

HUNGARY: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia



TYPES OF ACCOMMODATION:



Other frequent accommodation types:

Private accommodation:

32%

Camp: 27%

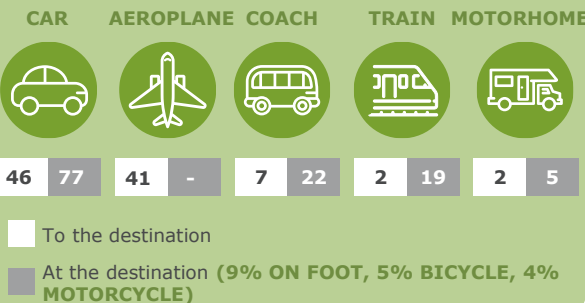
Friends, family: 27%

RESERVATION:

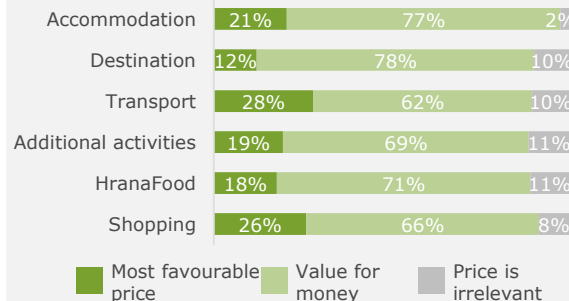
UP TO 3
months in
advance

74%

TRANSPORT MODE(%):

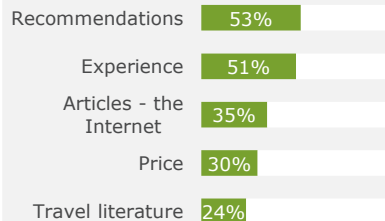


PRICE SENSITIVITY:

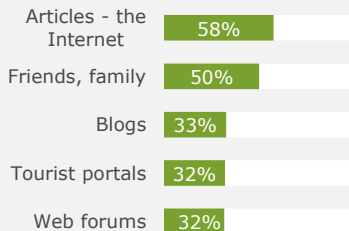


PURCHASE JOURNEY:

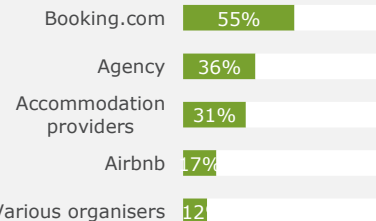
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

| | PLANNED COSTS | ACTUAL COSTS |
|--|---------------|--------------|
| ACCOMMODATION, FOOD and other per person/day | 46 € | 49 € |
| TRANSPORT MODE per person | 177 € | 189 € |

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.

HUNGARY: General travel habits and motives

Subsample: tourists in Slovenia



CHARACTERISTICS OF TOURISTS IN SLOVENIA:

| | | | |
|--------|---------|---------------|-----|
| Size* | 218.462 | Summer | 82% |
| Share* | 3,4% | Autumn | 7% |
| Age | 40 | Shorter trips | 3 |
| Women | 37% | Longer trips | 1 |

TRAVELLING WITH:

| | |
|-------------|-----|
| Family | 45% |
| As a couple | 37% |
| Friends | 13% |
| Alone | 4% |
| Relatives | 1% |

DESTINATION TYPE:

| | | |
|------------------|-----|-----|
| By the sea | 50% | 75% |
| In the mountains | 12% | 59% |
| By a lake | 5% | 44% |

4 x

a year
travels
abroad

ACTIVITIES - TOP 10:

| | |
|------------------------------------|-----|
| Sun and sea | 70% |
| Sightseeing of old town centres | 70% |
| History and castles | 60% |
| Sightseeing of a town, the capital | 54% |
| Natural parks, attractions | 51% |
| Tourist sights | 43% |
| Gastronomic delights | 43% |
| Sports activities | 40% |
| Museums, galleries, art | 38% |
| Cruise | 37% |

TRAVEL MOTIVES - TOP 10:

| | | |
|--|-----|-----|
| Visit a beautiful destination | 19% | 46% |
| To learn something new | 16% | 39% |
| Relaxation | 14% | 36% |
| Rest, slow down the pace of life | 9% | 34% |
| Spend time actively | 7% | 27% |
| Spend time with family, strengthen the bonds | 9% | 27% |
| Experience another culture | 7% | 23% |
| Visit a town, the capital | 3% | 23% |
| Contact with nature | 0% | 20% |
| Retreat from the everyday | 1% | 18% |

VISITING COUNTRIES - TOP 10:

| | | |
|----------------|-----|------|
| Slovenia | 64% | 100% |
| Croatia | 61% | 79% |
| Austria | 53% | 73% |
| Germany | 43% | 69% |
| Hungary | 45% | 67% |
| Italy | 56% | 67% |
| Slovakia | 35% | 61% |
| Greece | 41% | 53% |
| Romania | 27% | 50% |
| Czech Republic | 32% | 48% |

■ 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).

HUNGARY: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia



TYPES OF ACCOMMODATION:



Other frequent accommodation types:

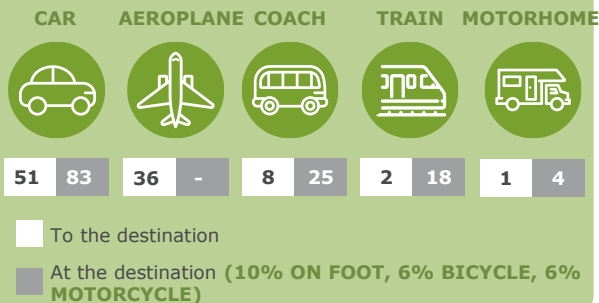
Camp: 31%
Hostel: 30%
Friends, family: 26%

RESERVATION:

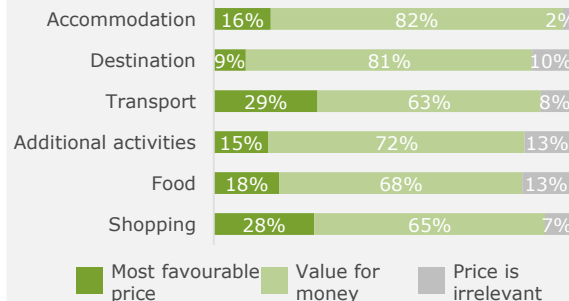


81%

TRANSPORT MODE(%):

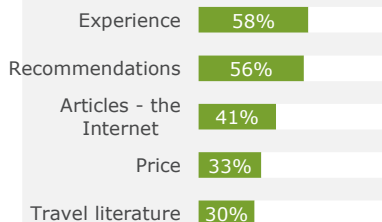


PRICE SENSITIVITY:

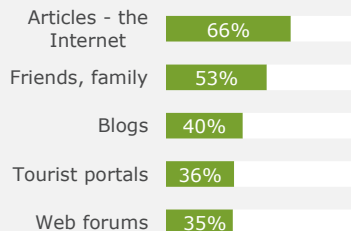


PURCHASE JOURNEY:

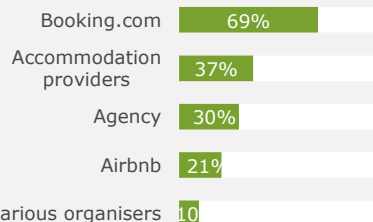
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

| | | PLANNED COSTS | ACTUAL COSTS |
|--|-----------|---------------|--------------|
| ACCOMMODATION, FOOD and other per person/day | in Europe | 42 € | 44 € |
| | in SLO | 48 € | 47 € |
| TRANSPORT MODE per person | in Europe | 174 € | 183 € |
| | in SLO | 119 € | 133 € |

NOTES:

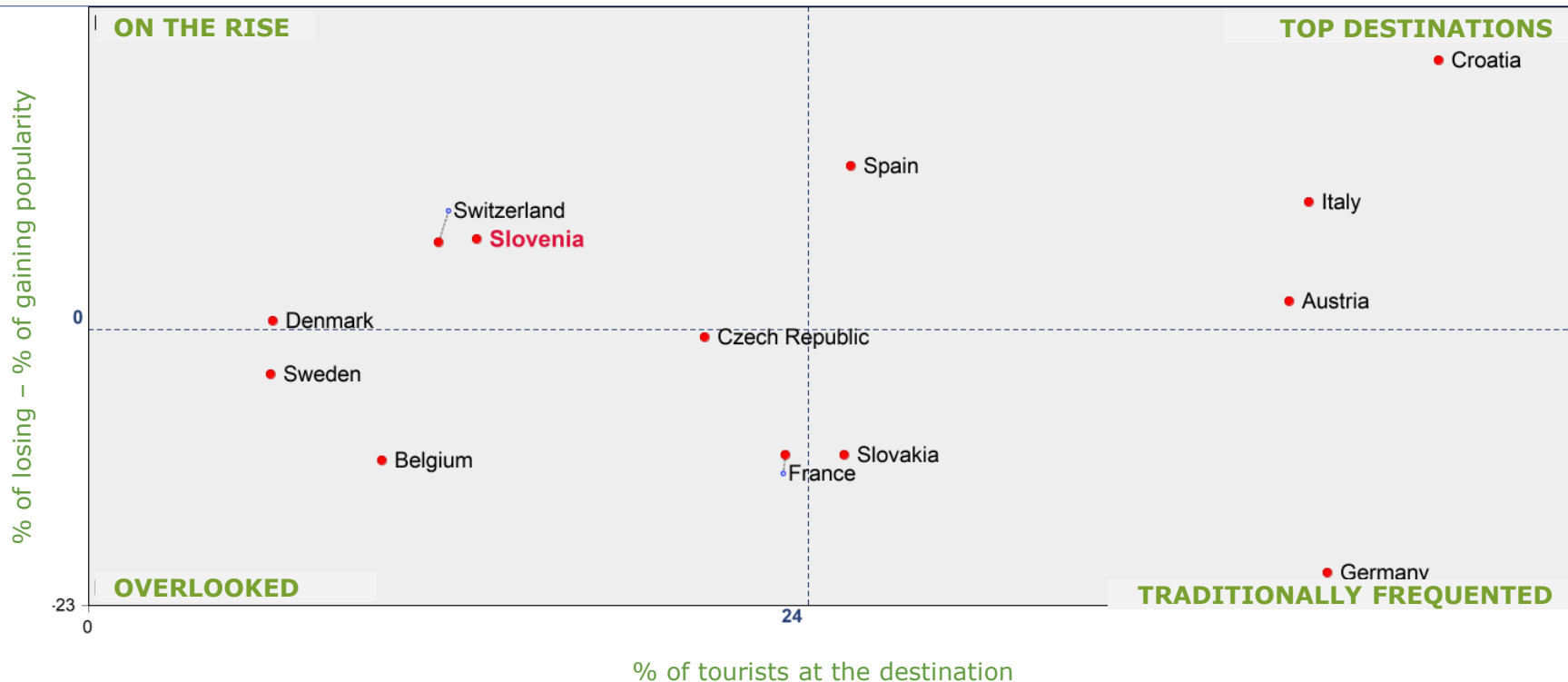
The results represent the subsample in the target group: they travel abroad at least once a year for a break or holiday, their destinations also include Slovenia. / TYPE OF ACCOMMODATION: where they usually spend the night. / RESERVATION: how far in advance they book. / TRANSPORT MODE: how they travel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



HUNGARY: Destination relevance

Share of visitors by popularity of the destination



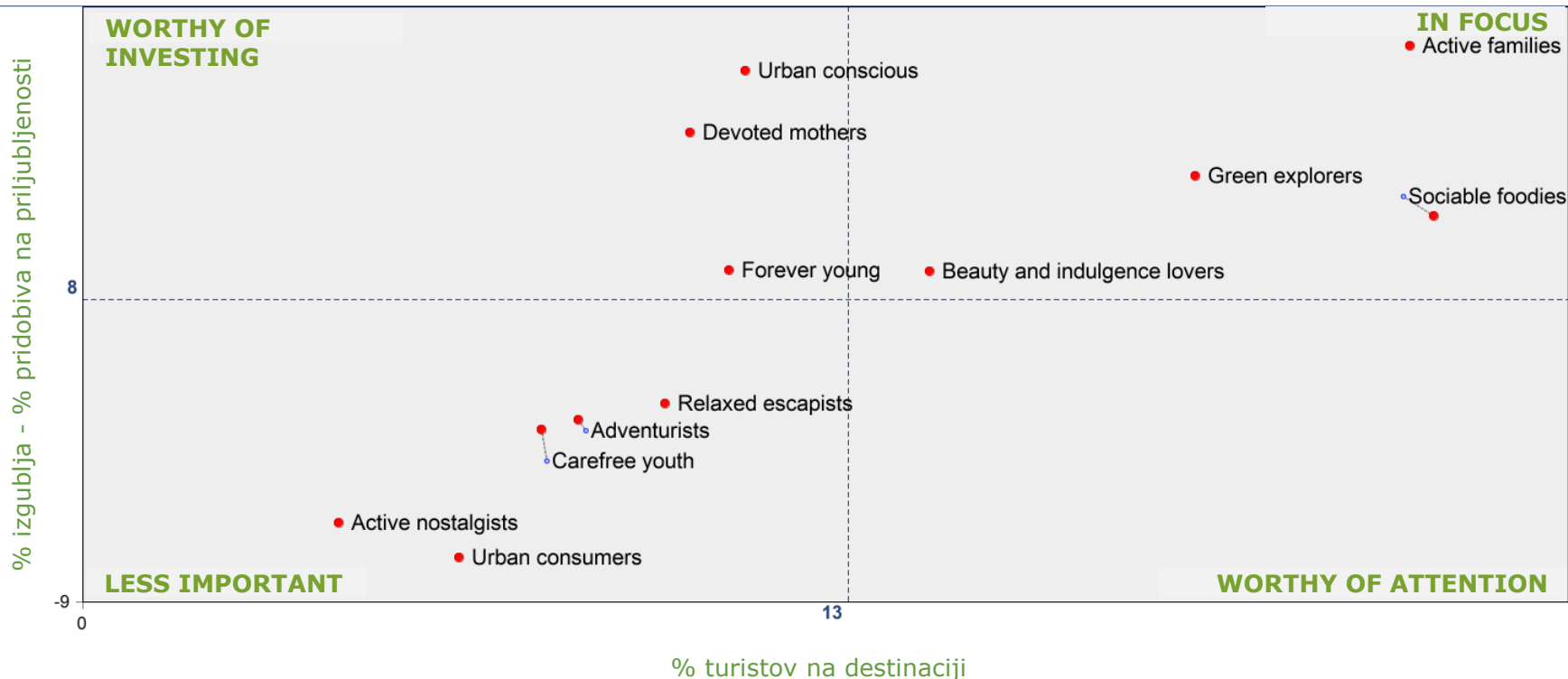
NOTES:

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).

HUNGARY: Slovenia's relevance

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



NOTES:

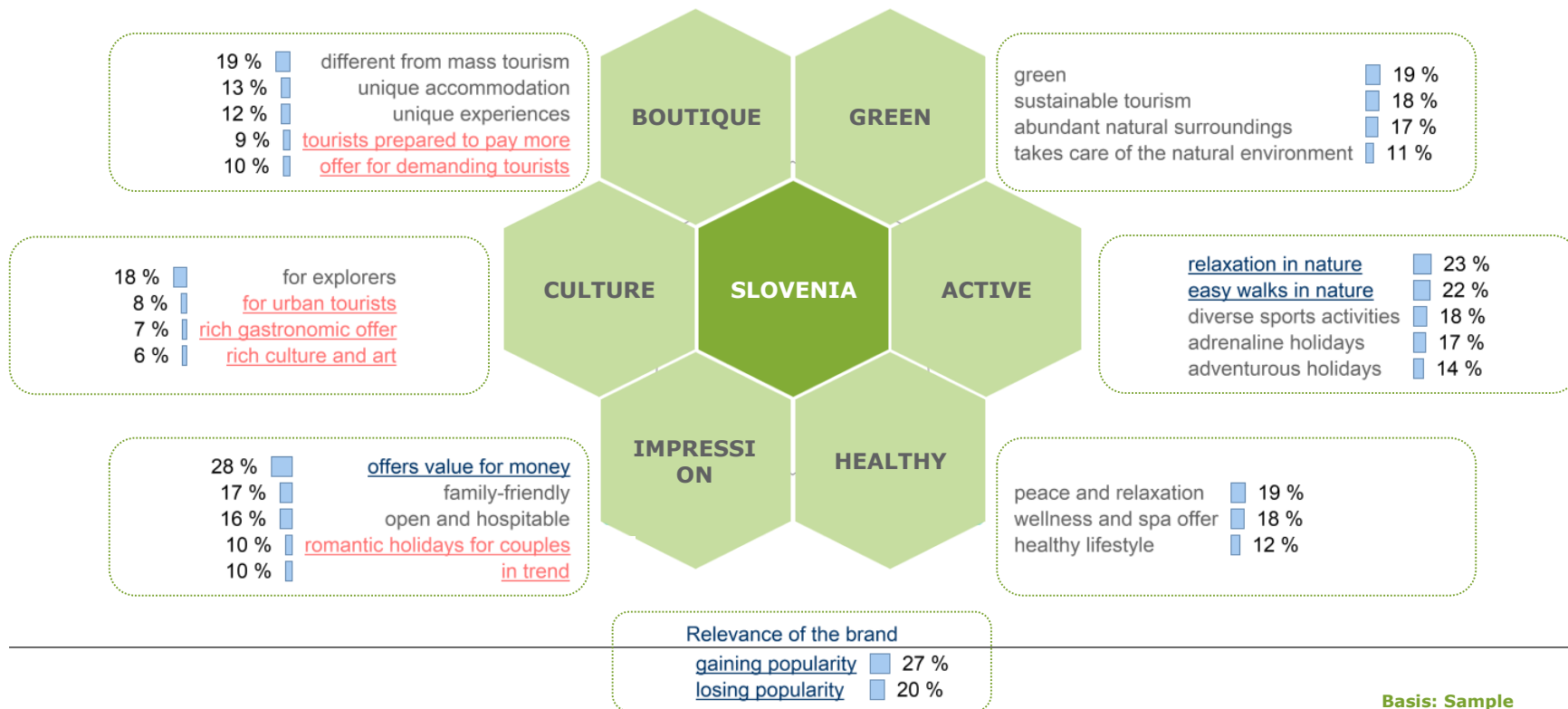
The chart shows the share of visitors according to the ratio of gaining – losing popularity (destination % losing – % gaining).

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).

HUNGARY: Slovenia's image



n=1560



Basis: Sample

NOTES:

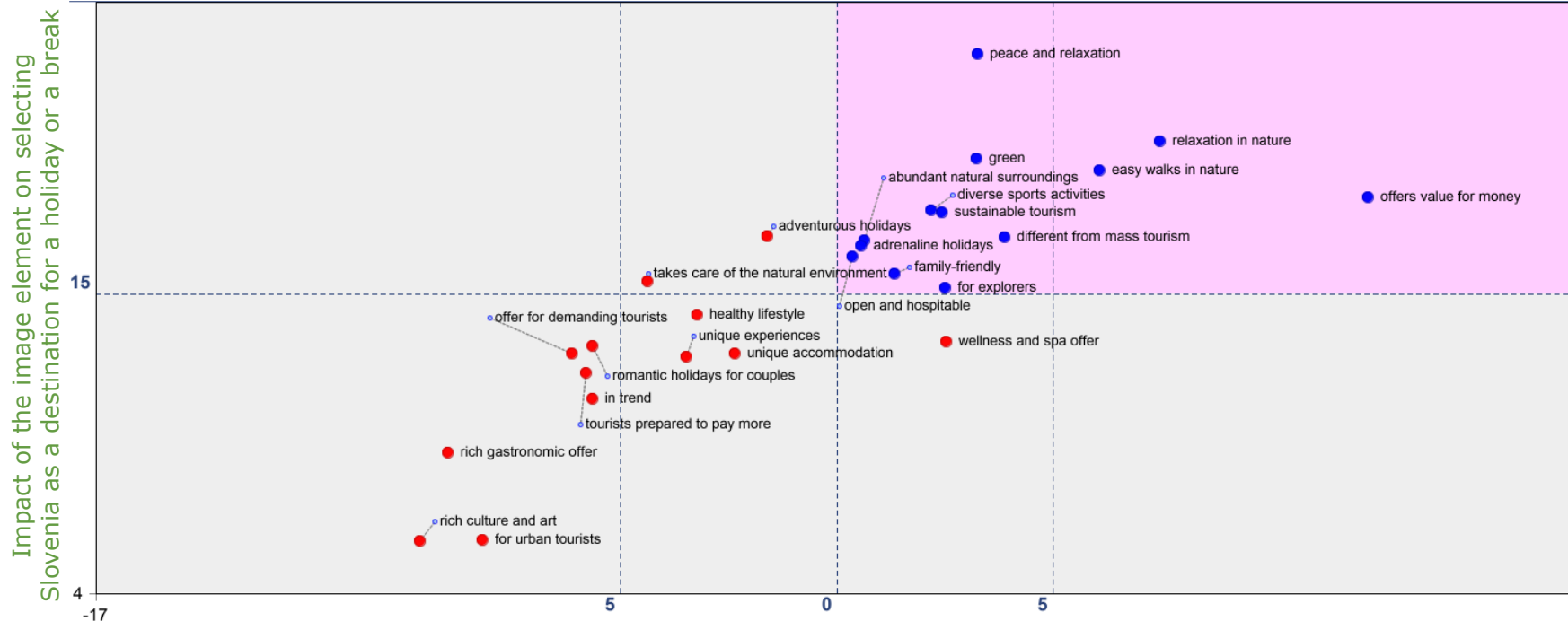
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

HUNGARY: 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:

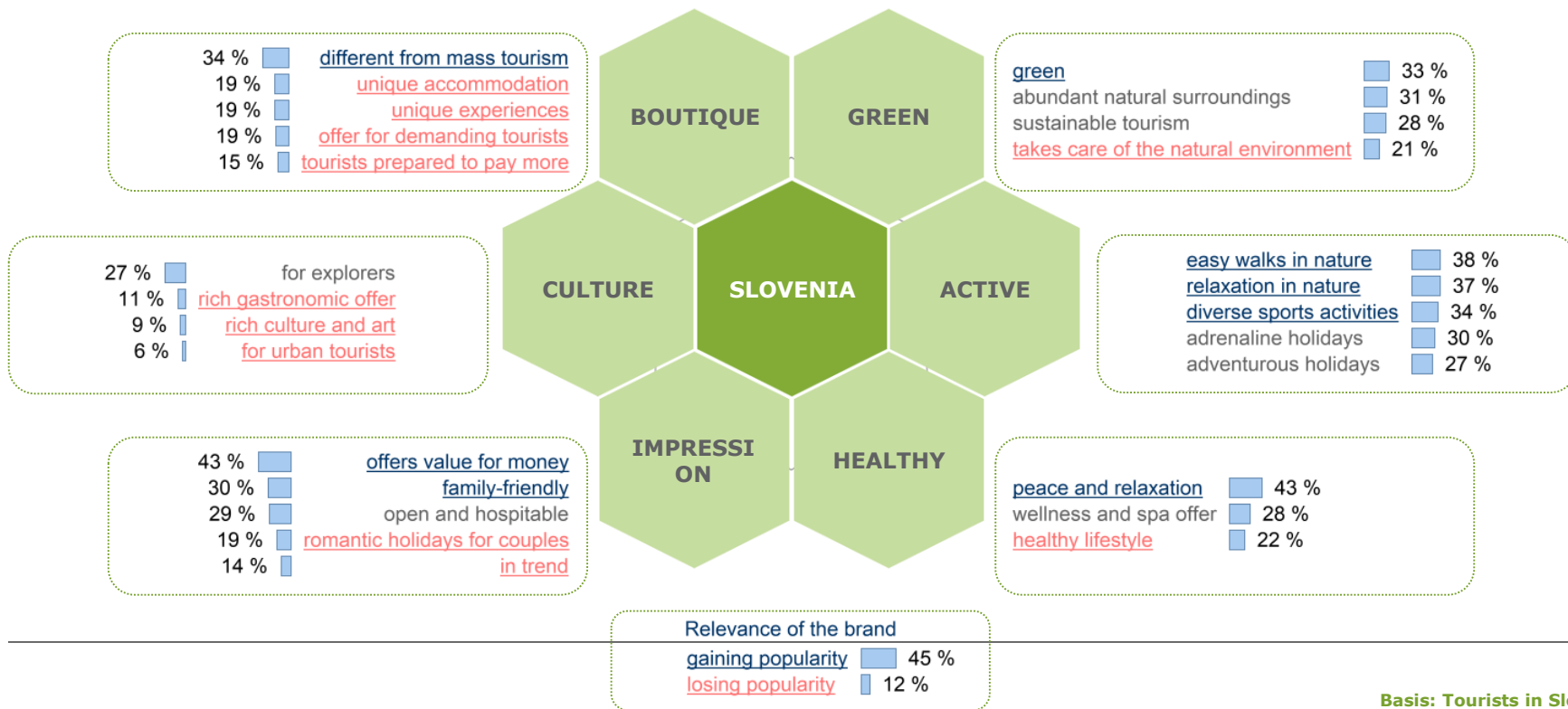
Guidelines for interpretation: elements in the upper right quadrant have a strong impact on the destination's image. These are the elements which influence an individual's decision to spend a holiday at a destination. The upper middle quadrant represents new opportunities.

HUNGARY: Slovenia's image

Subsample: tourists in Slovenia



n=202



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.

HUNGARY: 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.

HUNGARY: 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.

HUNGARY: 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

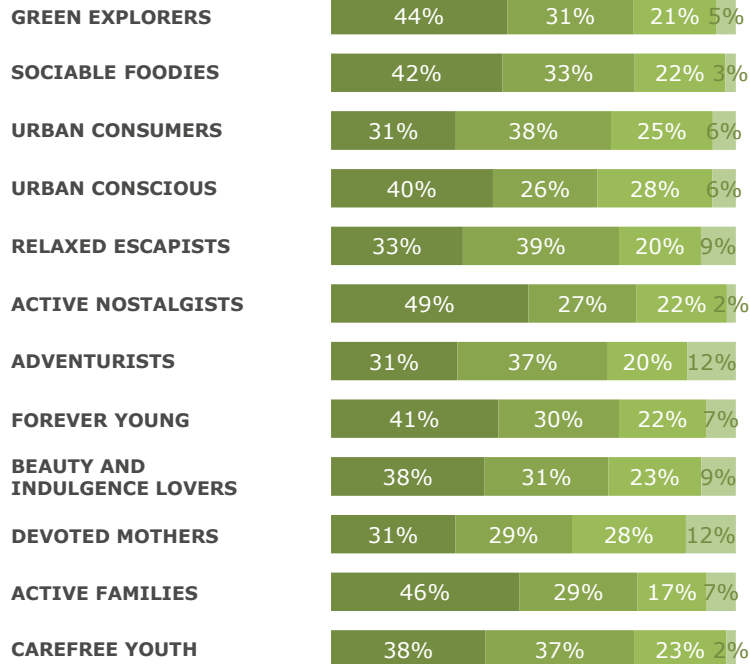


HUNGARY: Knowledge of, and experience with, Slovenia

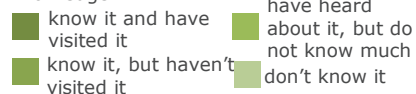


KNOWLEDGE OF SLOVENIA

Base: sample

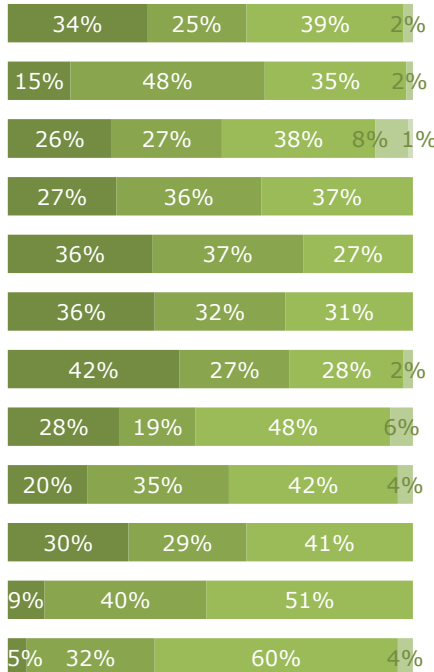


Knowledge:



SATISFACTION

Base: visitors of Slovenia

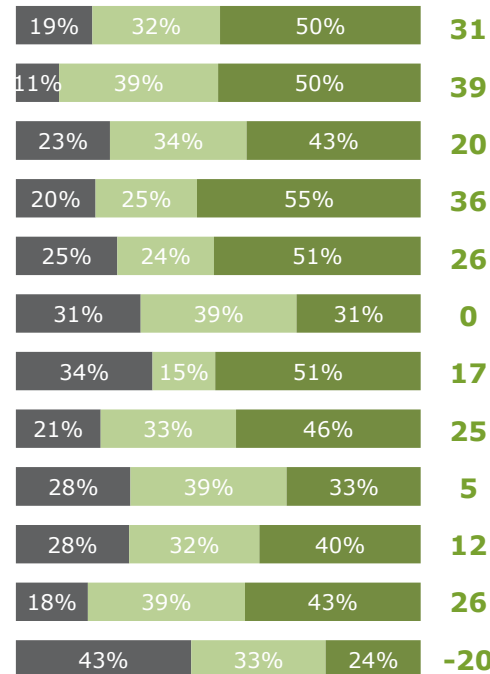


Meeting of expectations:



NPS – DEGREE OF RECOMMENDATION

NPS Index



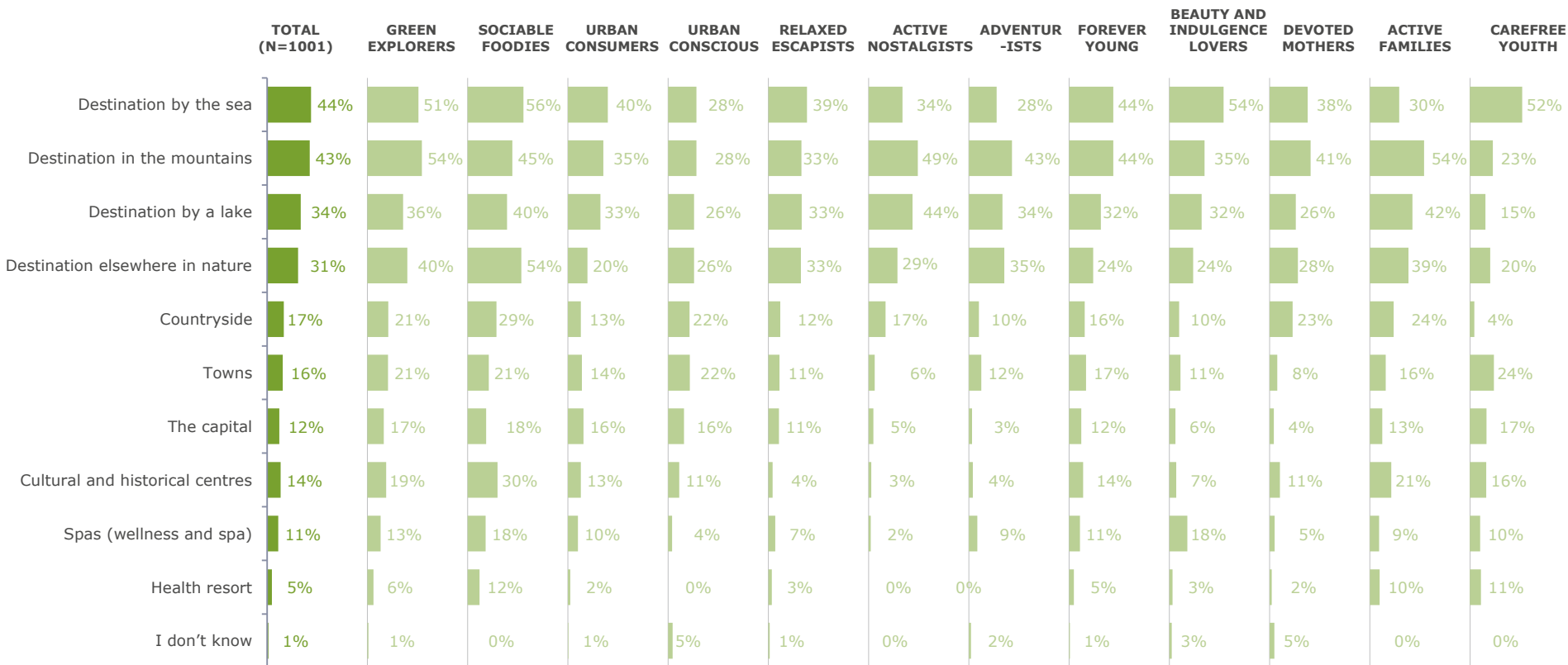
Recommendations:



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.

HUNGARY: 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=342

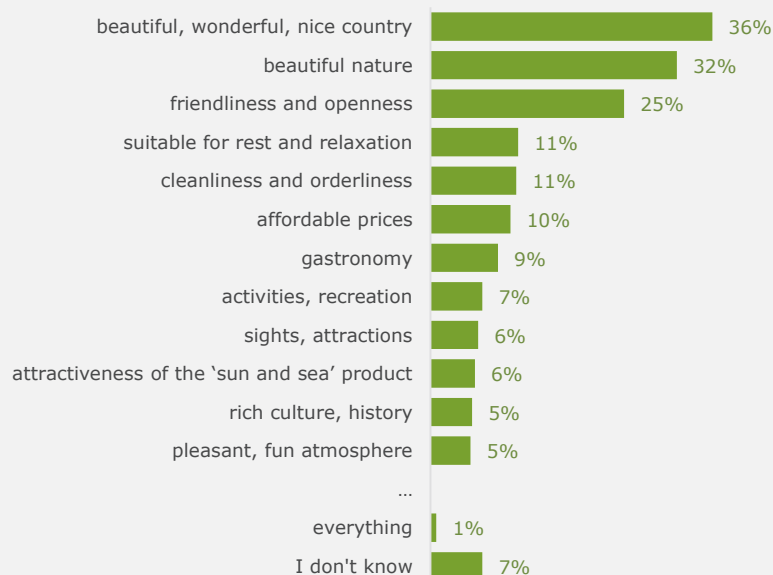


NOTES:

OTHER STATEMENTS: more information and information points, I'm not familiar enough, gastronomy, better transport infrastructure, connections, it is too far, more happening, fun, more hotel facilities, accommodation, ensure more pleasant staying, attractiveness

Elements of excitement – Top 12

Promoters (would recommend Slovenia), n=262

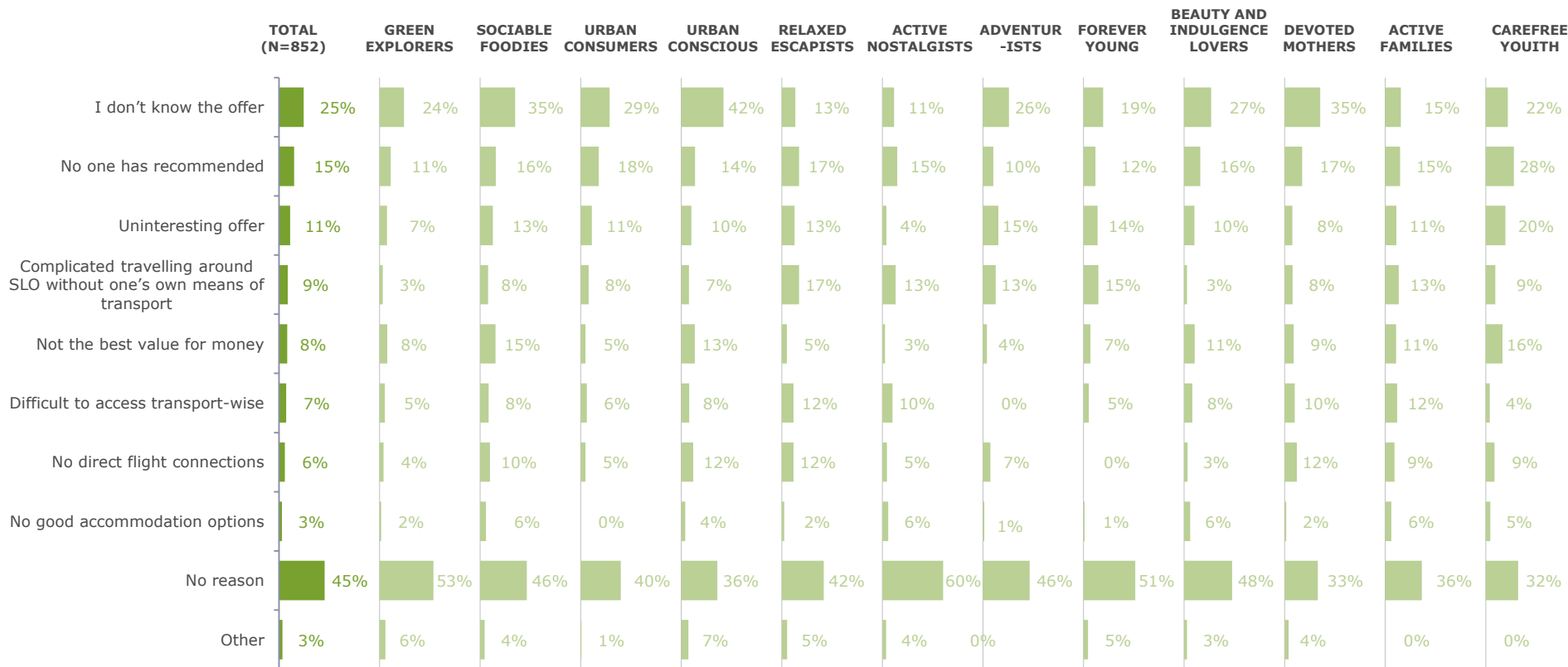


NOTES:

OTHER STATEMENTS: diverse nature (lakes, mountains, forests), accommodation, good tourist offer, proximity, location, it is not crowded, no mass tourism, good and high-quality service, green country, easy communication

HUNGARY: 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

HUNGARY: Green explorers (18,4%)



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



DESTINATION TYPE

| | | |
|------------------|-----|-----|
| In the mountains | 73% | +24 |
|------------------|-----|-----|

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

TYPES OF ACCOMMODATION

| | | |
|------------|-----|-----|
| Apartments | 87% | +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 | 57% | +10 |
|-----|-----|-----|

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

TRANSPORT AT THE DESTINATION

| | | |
|-----|-----|----|
| Car | 79% | +4 |
|-----|-----|----|

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

ACTIVITIES

| | | |
|---------------------------------|-----|-----|
| Sightseeing of old town centres | 80% | +26 |
| Natural | 66% | +20 |

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

MOTIVATION

| | | |
|------------------------------|-----|----|
| Recommendations from friends | 60% | +6 |
| Price of destination | 35% | +6 |

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

SOURCE OF INFORMATION

| | | |
|--------------------------|-----|-----|
| Articles on the Internet | 68% | +13 |
| Blogs | 40% | +9 |

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

RESERVATION METHOD

| | | |
|-------------------------------|-----|-----|
| Booking.com | 59% | +10 |
| Directly at the accommodation | 34% | +4 |

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

TRAVELLING WITH

| | | |
|---------|-----|----|
| Family | 41% | -1 |
| Friends | 16% | +0 |
| Alone | 6% | +1 |

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

CHARACTERISTICS:

| | |
|--------|---------|
| Size* | 309.499 |
| Share* | 5% |
| Age | 40 |
| Women | 41% |

| | |
|---------------|-----|
| Summer | 78% |
| Autumn | 12% |
| Shorter trips | 3 |
| Longer trips | 1 |

HUNGARY: 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: CILJNE SKUPINE:

| | | |
|--------|-----------|-----|
| Size* | 1.686.633 | 79% |
| Share* | 26,4% | 10% |
| Age | 39 | 3 |
| Women | 42% | 1 |

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

Longer trips

TRAVELLING WITH:

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

| | |
|-----------|----|
| Alone | 5% |
| Relatives | 1% |

DESTINATION TYPE:

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

| | | | |
|-----------|----|-----|-----|
| By a lake | 5% | 37% | 42% |
|-----------|----|-----|-----|

4 x

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 | 61% |
| Natural parks, attractions | 48% |
| Gastronomic delights | 39% |
| Wellness and (beauty) spa | 39% |
| Tourist sights | 37% |
| Cruises | 36% |
| Aquafun, amusement parks | 35% |

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)

| | | |
|--|-----|-----|
| visit beautiful destination | 19% | 49% |
| Experience another culture | 7% | 24% |
| Spend time with family, strengthen bonds | 9% | 23% |
| Enjoy good food, drinks | 2% | 21% |
| Retreat from everyday life | 3% | 18% |
| Spend time actively | 4% | 17% |
| Visit a town, a capital | 4% | 17% |

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)

| | | |
|----------------|-----|-----|
| Croatia | 33% | 45% |
| Romania | 10% | 26% |
| Spain | 20% | 25% |
| Slovakia | 13% | 25% |
| United Kingdom | 17% | 24% |
| Slovenia | 8% | 13% |

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).

HUNGARY: 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.

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(%):

CAR 47% AIR 2% COACH 2% TRAIN 4% MOTORHOME 4%



47

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

4

To the destination

At the destination (11% ON FOOT, 6% BICYCLE, 4% MOTORCYCLE)

PRICE SENSITIVITY:

Accommodation 74% 4%

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

Additional 18% 69% 13%

Food 28% 62% 10%

Shopping

Most favourable price Value for money Price is irrelevant

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:

Articles - the Internet 33%

Price 29%

Videos - the Internet 21%

Blogs 32%

Web forums 30%

Tourist portals 28%

Accommodation providers 30%

Airbnb 3%

Various organisers 12%

BUDGET AND SPENDING:

PLANNED

ACTUAL

Question: Think about your last holiday or break in Europe/stay in Slovenia (subsample: tourists in Slovenia) where you spent at least two nights and assess

the planned and actual costs of your trip.

The costs are calculated per person on the basis of additional verification of the number of persons and the number of days the trip lasted.

per person 175 € 188 €

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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