



IDENTIFICATION OF MARKET POTENTIAL

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

November 2018



Contracting Authority

Name: Slovenian Tourist Board

Address: Dimičeva ulica 13, 1000 Ljubljana

Contact person: Barbara Zmrzlikar

Contractor

Name: Valicon d.o.o.

Address: Kopitarjeva 2, 1000 Ljubljana

Contact person: Matjaž Robinšak

STATEMENT ON THE PROTECTION OF RESPONDENTS' PERSONAL DATA

As per ESOMAR and AAPOR codes, the Valicon company is obliged to protect the personal data of respondents. Valicon thus takes all measures to prevent the possibility of recognising the identity of the respondents. All variables or fields which could directly reveal the identity of the respondent were removed from databases and reports. Respondents' replies were also physically separated from their data. Every attempt by the Contracting Authority or the Valicon company to deliberately identify a respondent or disclose the respondent's identity denotes a violation of the above codes.

INTRODUCTION





7
countries

SWEDEN

DENMARK

BELGIUM

CZECH REPUBLIC

SWITZERLAND

HUNGARY

SPAIN



REPRESENTATIVE SAMPLE

23.597

respondents



10.916

representatives of
the target group



2.219

tourists and visitors to
Slovenia

12

PERSONAS



T = 19:52

Average duration of the survey



27 September – 17 October 2018

Period of data collection

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

VALICON

Global provider of web panels:





About the project

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

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





Content of the survey

The survey was used to examine:

- **structure of the market** and **market potential**
 - presence of 12 personas (segments) identified in the market research, 'Segmentation – identification of target groups of Slovenian tourism,' and structure of the target population according to the segments
 - identification of key segments (the largest or the one with the largest economic potential)
- **travel motives** and **the purchase decision process** for travelling within the region (Europe)
- **perception** and **competitive positioning of** the destination of Slovenia
- **knowledge of,** and **experience with,** visiting Slovenia, including the **degree of recommendation**



Substantive sets according to the level of analysis

The data obtained were analysed for each individual market at the level of the entire target group and at the level of various subsamples.

ENTIRE TARGET GROUP

Encompasses characteristics of those who **go abroad** in order to travel, have a break or a holiday **at least once a year** and **spend at least two nights** there.

VISITORS TO SLOVENIA (subsample 1)

Encompasses characteristics of those who **go abroad** in order to travel, have a break or a holiday **at least once a year** and **spend at least two nights** there. They know **Slovenia** and have already **visited** it, whereby short and non-tourist visits were also included.

TOURISTS IN SLOVENIA (subsample 2)

Encompasses characteristics of those who **go abroad** in order to travel, have a break or a holiday at least once a year and **spend at least two nights** there. The **destinations** where they have spent at least two nights also include **Slovenia**.

DISPLAY OF RESULTS:

- general **travel habits** and **motives**
- **elements of the purchase journey** and **consumption**

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

- **market structure** (personas)

- **knowledge, experience** and **NPS scale**

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



About the Contractor

VALICON

Valicon is a company operating in the field of marketing consulting with 20 years of rich experience dealing with market research. We adapt regional strategies to local markets and believe in long-term partnerships with our clients.

We do not merely conduct market research or collect data by means of surveys. Our **advanced technologies** differentiate us from others, while our services **add value to the business operations and brands** of our clients. We combine various approaches, such as market research, analytics and automation, marketing consulting and data collection in order to provide the highest level of quality and applicability in further steps of marketing processes and activities.

We rely on a proven structure where all our solutions observe the cycle of activities of your brand, product or company.



Panel presentation

The research was conducted in cooperation with the renowned **provider of web panels, Research Now**. The company is active globally when collecting data in Europe, the Middle East, America and the Asia-Pacific area, and is a **leading expert** in developing programme solutions for collecting data in multiple languages. It **holds the ISO 20252 certificate** and has **received** several **awards**. All their web **panels** are **actively controlled, protected** and generated on the basis of ten years' experience and enable **the implementation of projects on a high quality level**. Web panels are locally managed and provide support in the local language, while observing differences between countries and enabling adjusted awarding of members of the web panel. To obtain respondents, various programmes are used (eRewards®, Valued Opinions® and Peanut Labs®), which **enable access to** the most **representative** and **high-quality target groups** in various branches.

With its panels, **the company provided a sample of respondents**, who completed the survey in their languages **within the Valicon survey system**, with which **supervision of the sample structure** and **data quality** was maintained simultaneously.



Source: 2016 Annual Survey of Market Research Professionals (MarketResearchCareers.com)



2017 TOP 50
INNOVATIVE
COMPANY

RESEARCH NOW
RANKED #6

METHODOLOGY





Methodological framework of the survey



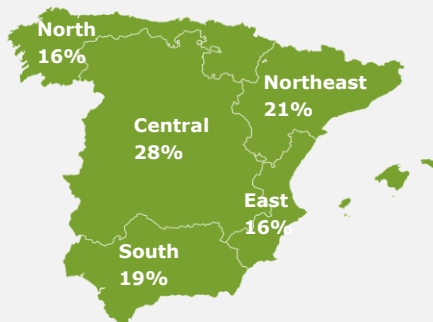
Method of implementation	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
Country of implementation	Spain
Implementation period	9 October – 15 October 2018
Target group	Citizens of a certain country, who <u>travel abroad at least once a year for a break, holiday or a trip and spend at least two nights there.</u>
Sample	Entire sample: n=2.812; Target group: n=1.551; Visitors to Slovenia: n=205; Tourists in Slovenia: n=31.
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=20:05.



SPAIN: Sample demographics



REGIJE:



DETAILED DEFINITION OF REGIONS :

North: Asturias, Cantabria, Galicia, Navarra, País Vasco, Rioja.

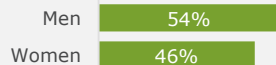
Northeast: Aragón, Catalunya.

Central: Castilla -La Mancha, Castilla in León, Extremadura, Madrid.

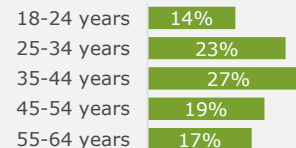
East: Balears, Valencia, Murcia.

South: Andalusia

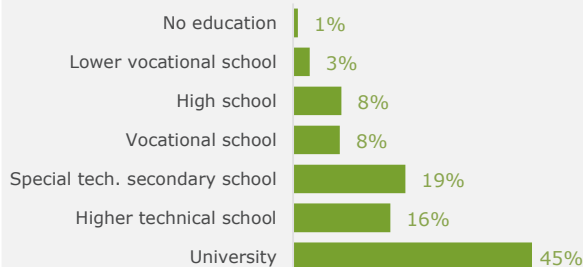
GENDER:



AGE:



EDUCATION:



PERSONAL INCOME:





Sample shares and sizes



Bordered ellipses show the basis for share calculations.



Basis: SPAIN 18-65 years	
POPULATION (18-65 YEARS)	100,0%
TARGET GROUP	56,3%
VISITORS TO SLOVENIA	7,4%
TOURISTS IN SLOVENIA	1,1%

Basis: TARGET GROUP	
POPULATION (18-65 YEARS)	/
TARGET GROUP	100,0%
VISITORS TO SLOVENIA	13,2%
TOURISTS IN SLOVENIA	2,0%

Absolute size*	
	29.823.712
	7.880.997
	3.055.135
	1.020.788

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

MARKET STRUCTURE AND SIZE (PERSONAS)



SPAIN: Size of the potential



Top choice

0,6%

10%

**NARROW
POTENTIAL**
Top choice +
repeated visit

2%

25%

**BROAD
POTENTIAL**
Choice

6%

90%

Visit or choice

7%

ESP

n=1551

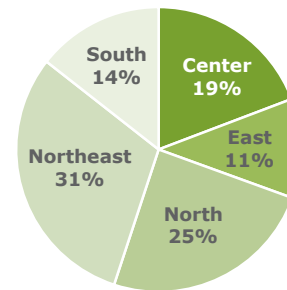
NARROW POTENTIAL:

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:	132.201
Central	25.418
East	14.949
North	32.431
Northeast	40.342
South	19.060

REGIONAL CLASSIFICATION:



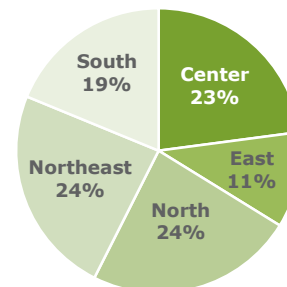
BROAD POTENTIAL:

6%

*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:	481.768
Central	110.377
East	52.465
North	113.929
Northeast	114.441
South	90.556

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.

SPAIN: Size of segments by regions



URBAN CONSUMERS:

21,6%

1.705.283



GREEN EXPLORERS:

14,4%

1.135.418



SOCIABLE FOODIES:

13,4%

1.055.499

	Total	Central	East	North	Northeast	South
Size (%)	100,0%	27,8%	15,9%	16,5%	20,8%	19,0%
Size	7.880.997	2.194.239	1.250.126	1.299.866	1.637.329	1.499.438
GREEN EXPLORERS Size (%)	14,4%	26,8%	15,2%	17,7%	23,9%	16,4%
Size	1.135.418	304.736	172.395	200.788	271.846	185.654
SOCIABLE FOODIES Size (%)	13,4%	29,5%	14,4%	20,2%	18,5%	17,3%
Size	1.055.499	311.457	152.509	213.542	195.153	182.838
URBAN CONSUMERS Size (%)	21,6%	27,7%	15,0%	14,6%	20,7%	22,0%
Size	1.705.283	472.235	256.332	248.265	353.370	375.081
URBAN CONSCIOUS Size (%)	9,9%	27,7%	15,7%	20,3%	19,3%	17,1%
Size	778.475	215.407	121.869	158.318	149.859	133.023
RELAXED ESCAPISTS Size (%)	8,2%	20,5%	17,4%	17,8%	24,8%	19,5%
Size	650.138	133.591	112.916	116.028	161.107	126.496
ACTIVE NOSTALGISTS Size (%)	6,6%	36,6%	15,2%	13,3%	19,9%	15,0%
Size	518.541	189.529	78.897	68.947	103.403	77.765
ADVENTURISTS Size (%)	3,3%	28,4%	12,2%	16,5%	22,8%	20,0%
Size	256.995	73.056	31.331	42.448	58.723	51.436
FOREVER YOUNG Size (%)	10,7%	26,6%	12,2%	15,0%	22,6%	23,5%
Size	841.251	223.898	102.662	126.543	190.529	197.620
BEAUTY AND INDULGENCE LOVERS Size (%)	4,9%	24,5%	26,7%	16,4%	15,4%	16,9%
Size	386.896	94.926	103.261	63.391	59.772	65.546
DEVOTED MOTHERS Size (%)	1,7%	41,4%	18,7%	6,0%	12,7%	21,2%
Size	132.445	54.792	24.771	7.881	16.857	28.144
ACTIVE FAMILIES Size (%)	2,5%	29,6%	24,3%	10,1%	18,7%	17,3%
Size	193.336	57.172	47.069	19.484	36.244	33.367
CAREFREE YOUTH Size (%)	2,9%	28,0%	20,3%	15,1%	17,8%	18,7%
Size	226.720	63.439	46.114	34.233	40.466	42.468

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

Towns	62%
By the sea	53%
Cultural and historical centres	51%
Capitals	47%
In the mountains	37%

TYPE OF ACCOMMODATION

Hotel	89%
Apartment	48%
Hostel	22%
Private accommodation (e.g. Airbnb)	20%
Staying with relatives or friends	20%

TRANSPORT TO THE DESTINATION

Aeroplane	76%
Car	18%
Motorhome (camper)	3%
Train	1%
Coach	1%

TRANSPORT AT THE DESTINATION

Car	72%
Coach	33%
Train	31%
On foot	12%
Motorhome (camper)	4%

ACTIVITIES

Sightseeing of old town centres	67%
Sightseeing of a town, the capital	63%
History and castles	56%
Natural sights, nature	56%
Seeing major tourist attractions	48%

MOTIVATION

Recommendations from friends	45%
Past experience	39%
Price of the destination	38%
Popularity of the destination	30%
Suitability of the destination in all seasons	27%

SOURCE OF INFORMATION

Friends, family	50%
Web portals (TripAdvisor etc.)	45%
Articles on the Internet	39%
Blogs	33%
Opinions in social media	28%

RESERVATION METHOD

Booking.com	64%
Agency	31%
Expedia.com	25%
Airbnb	22%
Directly at the accommodation provider	21%

TRAVELLING WITH

As a couple	53%
Family	28%
Friends	14%
Alone	5%
Relatives	0%

CHARACTERISTICS:

Size*	16.788.761
Share*	56%
Age	40
Women	46%

Spring	21%
Summer	59%
Shorter trips	2
Longer trips	1

SPAIN: Visitors to Slovenia (13,2%)



DESTINATION TYPE

In the mountains	50%	+14
By a lake	40%	+19
By the sea	47%	-6
Towns	50%	-11
Elsewhere in nature	35%	+4

TYPE OF
ACCOMMODATION

Boutique hotel	29%	+12
Hostel	30%	+8
Apartment	54%	+6
Tourist farm	14%	+7
Glamping	8%	+5

TRANSPORT TO THE
DESTINATION

Car	18%	+0
Motorhome (camper)	4%	+2
Coach	2%	+1
Aeroplane	75%	-2
Train	1%	+0

TRANSPORT AT THE
DESTINATION

Car	74%	+2
Motorcycle	10%	+6
Coach	29%	-4
Motorhome (camper)	8%	+4
Train	26%	-5

ACTIVITIES

Sports activities	38%	+15
Wellness and spa	32%	+8
Winter sports	23%	+12
Water sports activities	25%	+9
Mountaineering (more challenging tours)	24%	+10

MOTIVATION

Travel literature	32%	+14
Past experience	41%	+2
Articles on the Internet	29%	+6
Travel presentations	23%	+14
Recommendations from friends	42%	-3

SOURCE OF
INFORMATION

Friends, family	56%	+6
Articles in print media	29%	+11
Articles on the Internet	38%	-1
Blogs	33%	+1
Travel presentations	25%	+15

RESERVATION METHOD

Expedia.com	35%	+10
Booking.com	68%	+4
Agency	35%	+4
Organiser	13%	+6
Agoda.com	12%	+7

TRAVELLING WITH

As a couple	62%	+10
Alone	7%	+2
Family	18%	-10
Friends	12%	-1
Relatives	0%	+0

CHARACTERISTICS:

Size*	2.215.719
Share*	7%
Age	37
Women	47%

Spring	18%
Summer	61%
Shorter trips	4
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.

SPAIN: Tourists in Slovenia (2,0%)



DESTINATION TYPE

In the mountains	49%	+13
Cultural and historical centres	60%	+9
Towns	67%	+5
Countryside	29%	+10
Elsewhere in nature	37%	+7

TYPE OF ACCOMMODATION

Hostel	35%	+14
Apartment	53%	+6
Hotel	87%	-1
Boutique hotel	21%	+4
Own accommodation	12%	+4

TRANSPORT TO THE DESTINATION

Aeroplane	89%	+13
Car	11%	-7

TRANSPORT AT THE DESTINATION

Train	35%	+4
Bicycle	7%	+5
Car	70%	-2
Coach	31%	-2
Motorcycle	4%	+0

ACTIVITIES

<u>Museums, galleries and art</u>	65%	+20
Sightseeing of a town, the capital	73%	+10
History and castles	66%	+10
Touring	34%	+11
Natural sights, nature	64%	+8

MOTIVATION

<u>Travel literature</u>	40%	+21
Articles on the Internet	33%	+10
<u>Articles in print media</u>	27%	+14
Recommendations from friends	41%	-4
Posts on social media, blogs	33%	+7

SOURCE OF INFORMATION

Blogs	45%	+13
Friends, family	59%	+9
<u>Travel literature</u>	35%	+17
Articles on the Internet	44%	+4
Travel presentations	16%	+6

RESERVATION METHOD

Booking.com	82%	+18
Expedia.com	41%	+16
Airbnb	30%	+7
Directly at the accommodation provider	28%	+7
At the activity provider	9%	+1

TRAVELLING WITH

As a couple	64%	+12
Friends	12%	-2
Family	20%	-8
Alone	4%	-1

CHARACTERISTICS:

Size*	335.154
Share*	1%
Age	45
Women	53%

Spring	13%
Summer	62%
Shorter trips	3
Longer trips	2

SPAIN: Urban consumers (21,6%)



DESTINATION TYPE

Towns	83%	+21
Cultural and historical centres	51%	+0
Capitals	49%	+2
By the sea	45%	-8
Spas (wellness and spa)	10%	-1

TYPE OF ACCOMMODATION

Hotel	95%	+6
Private accommodation (e.g. Airbnb)	18%	-2
Staying with relatives or friends	18%	-2
Boutique hotel	12%	-5
Apartment	39%	-8

TRANSPORT TO THE DESTINATION

Aeroplane	81%	+5
Car	18%	-1
Bicycle	0%	+0
Train	0%	-1
Ship or another vessel	0%	+0

TRANSPORT AT THE DESTINATION

Train	33%	+2
Car	73%	+1
On foot	12%	+1
Coach	32%	-1
Bicycle	1%	-1

ACTIVITIES

Shopping	56%	+22
Sightseeing of a town, the capital	70%	+7
Gastronomy	57%	+13
Seeing major tourist attractions	57%	+9
Social events, festivals	43%	+13

MOTIVATION

Price of the destination	44%	+5
Recommendations from friends	48%	+3
Popularity of the destination	34%	+4
Suitability of the destination in all seasons	27%	+0
Past experience	39%	-1

SOURCE OF INFORMATION

Friends, family	53%	+3
Web portals (TripAdvisor etc.)	48%	+3
Opinions in social media	28%	+1
Web forums	26%	+1
Articles on the Internet	38%	-1

RESERVATION METHOD

Booking.com	66%	+2
Agency	29%	-2
Through official TICs	10%	+2
Directly at the accommodation provider	20%	-2
Other web portal	6%	+0

TRAVELLING WITH

Friends	17%	+3
As a couple	51%	-1
Family	27%	-1
Relatives	1%	+0
Alone	4%	-1

CHARACTERISTICS:

Size*	3.632.737
Share*	12%
Age	41
Women	51%

Spring	21%
Summer	58%
Shorter trips	2
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.

SPAIN: Green Explorers (14,4%)



DESTINATION TYPE

Cultural and historical centres	<u>76%</u>	<u>+25</u>
In the mountains	<u>64%</u>	<u>+28</u>
By the sea	<u>76%</u>	<u>+23</u>
Towns	<u>75%</u>	<u>+13</u>
Elsewhere in nature	<u>52%</u>	<u>+22</u>

TYPE OF ACCOMMODATION

Apartment	<u>79%</u>	<u>+31</u>
Staying with relatives or friends	<u>27%</u>	<u>+6</u>
Private accommodation (e.g. Airbnb)	<u>26%</u>	<u>+6</u>
Camp	<u>20%</u>	<u>+6</u>
Hotel	<u>86%</u>	<u>-2</u>

TRANSPORT TO THE DESTINATION

Car	<u>20%</u>	<u>+2</u>
Aeroplane	<u>76%</u>	<u>-1</u>
Train	<u>1%</u>	<u>+0</u>
Coach	<u>1%</u>	<u>+0</u>
Motorhome (camper)	<u>1%</u>	<u>-1</u>

TRANSPORT AT THE DESTINATION

Coach	<u>40%</u>	<u>+7</u>
Car	<u>73%</u>	<u>+2</u>
Train	<u>34%</u>	<u>+3</u>
On foot	<u>14%</u>	<u>+3</u>
Motorhome (camper)	<u>4%</u>	<u>+0</u>

ACTIVITIES

Sightseeing of old town centres	<u>87%</u>	<u>+20</u>
Natural sights, nature	<u>82%</u>	<u>+26</u>
Sightseeing of a town, the capital	<u>76%</u>	<u>+13</u>
Sun and sea	<u>52%</u>	<u>+9</u>
Sports activities	<u>38%</u>	<u>+16</u>

MOTIVATION

Recommendations from friends	<u>50%</u>	<u>+5</u>
Popularity of the destination	<u>34%</u>	<u>+5</u>
Suitability of the destination in all seasons	<u>32%</u>	<u>+6</u>
TV programmes	<u>31%</u>	<u>+6</u>
Price of the destination	<u>39%</u>	<u>+0</u>

SOURCE OF INFORMATION

Friends, family	<u>56%</u>	<u>+6</u>
Articles on the Internet	<u>49%</u>	<u>+10</u>
Web portals (TripAdvisor etc.)	<u>50%</u>	<u>+5</u>
Web forums	<u>27%</u>	<u>+1</u>
Travel literature	<u>21%</u>	<u>+2</u>

RESERVATION METHOD

Booking.com	<u>73%</u>	<u>+9</u>
Airbnb	<u>33%</u>	<u>+11</u>
Directly at the accommodation provider	<u>24%</u>	<u>+3</u>
Other web portal	<u>9%</u>	<u>+3</u>
Expedia.com	<u>26%</u>	<u>+1</u>

TRAVELLING WITH

As a couple	<u>57%</u>	<u>+4</u>
Family	<u>28%</u>	<u>+0</u>
Friends	<u>14%</u>	<u>+0</u>
Alone	<u>2%</u>	<u>-3</u>

CHARACTERISTICS:

Size*	2.418.763
Share*	8%
Age	39
Women	45%

Spring	20%
Summer	59%
Shorter trips	2
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.

SPAIN: Sociable foodies (13,4%)



DESTINATION TYPE

Cultural and historical centres	88%	+36
Capitals	78%	+31
Towns	80%	+18
By the sea	74%	+21
Elsewhere in nature	43%	+13

TYPE OF ACCOMMODATION

Hotel	99%	+10
Boutique hotel	32%	+15
Apartment	52%	+4
Private accommodation (e.g. Airbnb)	27%	+7
Own accommodation	11%	+4

TRANSPORT TO THE DESTINATION

Aeroplane	80%	+4
Train	2%	+1
Car	17%	-1
Coach	1%	+0

TRANSPORT AT THE DESTINATION

Car	78%	+6
Train	39%	+8
Coach	36%	+4
On foot	15%	+4
Bicycle	3%	+0

ACTIVITIES

History and castles	87%	+31
Sightseeing of old town centres	94%	+28
Seeing major tourist attractions	80%	+32
Sightseeing of a town, the capital	86%	+23
Natural sights, nature	82%	+26

MOTIVATION

Past experience	53%	+14
Popularity of the destination	44%	+14
Suitability of the destination in all seasons	42%	+15
Price of the destination	49%	+11
Recommendations from friends	52%	+7

SOURCE OF INFORMATION

Web portals (TripAdvisor etc.)	65%	+19
Articles on the Internet	51%	+12
Opinions in social media	39%	+12
Web forums	37%	+12
Friends, family	54%	+3

RESERVATION METHOD

Booking.com	72%	+7
Agency	39%	+8
Directly at the accommodation provider	30%	+9
Expedia.com	31%	+6
At the activity provider	13%	+5

TRAVELLING WITH

Family	41%	+13
As a couple	50%	-3
Relatives	1%	+1
Friends	6%	-7
Alone	2%	-4

CHARACTERISTICS:

Size*	2.248.513
Share*	8%
Age	44
Women	47%

Spring	19%
Summer	60%
Shorter trips	2
Longer trips	1

SPAIN: Forever young (10,7%)



DESTINATION TYPE

Cultural and historical centres	42%	-9
Towns	43%	-18
By a lake	14%	-6
By the sea	41%	-13
Capitals	35%	-12

TYPE OF ACCOMMODATION

Hotel	94%	+6
<u>Camp</u>	17%	+3
Hostel	18%	-3
<u>Camper</u>	9%	+2
Apartment	36%	-12

TRANSPORT TO THE DESTINATION

Aeroplane	77%	+1
Train	1%	+0
Coach	1%	+0
<u>Ship or another vessel</u>	1%	+0
Car	18%	-1

TRANSPORT AT THE DESTINATION

Coach	32%	-1
On foot	12%	+0
Bicycle	3%	+0
Car	67%	-5
Train	28%	-3

ACTIVITIES

<u>Sightseeing of old town centres</u>	78%	+11
<u>History and castles</u>	71%	+15
<u>Touring</u>	41%	+18
<u>Seeing major tourist attractions</u>	55%	+7
<u>Health treatments and services</u>	25%	+13

MOTIVATION

Proximity of the destination	20%	+3
TV ads	19%	+6
Posts on social media, blogs	22%	-3
Price of the destination	34%	-5
Recommendations from friends	40%	-5

SOURCE OF INFORMATION

Friends, family	48%	-3
<u>Agencies</u>	28%	+6
Blogs	31%	-2
Articles in print media	18%	+1
Web portals (TripAdvisor etc.)	37%	-9

RESERVATION METHOD

Agency	30%	+0
<u>Agoda.com</u>	9%	+3
Expedia.com	24%	-1
<u>Organiser</u>	9%	+2
Booking.com	60%	-4

TRAVELLING WITH

<u>As a couple</u>	58%	+6
Family	25%	-4
<u>Alone</u>	7%	+2
Friends	10%	-3

CHARACTERISTICS:

Size*	1.792.102
Share*	6%
Age	41
Women	38%

Spring	20%
Summer	57%
Shorter trips	2
Longer trips	1

SPAIN: Urban conscious (9,9%)



DESTINATION TYPE

Capitals	75%	+28
Towns	75%	+13
Cultural and historical centres	62%	+11
Elsewhere in nature	19%	-12
Countryside	11%	-8

TYPE OF ACCOMMODATION

Hostel	43%	+22
Apartment	49%	+2
Private accommodation (e.g. Airbnb)	28%	+8
Staying with relatives or friends	24%	+4
Hotel	86%	-3

TRANSPORT TO THE DESTINATION

Aeroplane	79%	+3
Coach	3%	+2
Motorhome (camper)	4%	+1
Motorcycle	1%	+0
Car	13%	-5

TRANSPORT AT THE DESTINATION

Train	48%	+18
Coach	42%	+10
On foot	18%	+6
Car	64%	-8
Motorcycle	4%	+0

ACTIVITIES

Sightseeing of old town centres	84%	+17
Museums, galleries and art	76%	+30
Learning about the local way of life	58%	+34
Sightseeing of a town, the capital	77%	+14
Gastronomy	60%	+16

MOTIVATION

Price of the destination	49%	+10
Suitability of the destination in all seasons	36%	+9
Articles on the Internet	31%	+8
Posts on social media, blogs	32%	+6
Popularity of the destination	32%	+3

SOURCE OF INFORMATION

Web portals (TripAdvisor etc.)	51%	+6
Blogs	42%	+9
Articles on the Internet	43%	+4
Web forums	31%	+6
Travel literature	25%	+6

RESERVATION METHOD

Directly at the accommodation provider	30%	+8
Airbnb	29%	+7
Expedia.com	26%	+1
Booking.com	63%	-1
Own accommodation	7%	+2

TRAVELLING WITH

Family	31%	+3
Alone	13%	+8
As a couple	41%	-12
Friends	16%	+2

CHARACTERISTICS:

Size*	1.658.374
Share*	6%
Age	41
Women	49%

Spring	20%
Summer	56%
Shorter trips	2
Longer trips	1

SPAIN: Relaxed escapists (8,2%)



DESTINATION TYPE

Countryside	20%	+1
By the sea	38%	-15
Towns	43%	-19
Spas (wellness and spa)	9%	-2
Cultural and historical centres	32%	-19

TYPE OF ACCOMMODATION

Hotel	89%	+1
Private accommodation (e.g. Airbnb)	19%	-2
Staying with relatives or friends	17%	-3
Glamping	4%	+1
Tourist farm	5%	-1

TRANSPORT TO THE DESTINATION

<u>Motorcycle</u>	<u>2%</u>	<u>+2</u>
Car	20%	+1
<u>Coach</u>	<u>2%</u>	<u>+1</u>
Aeroplane	70%	-6
Motorhome (camper)	3%	+0

TRANSPORT AT THE DESTINATION

Car	74%	+2
<u>Motorcycle</u>	<u>7%</u>	<u>+4</u>
Coach	26%	-7
<u>Motorhome (camper)</u>	<u>7%</u>	<u>+2</u>
Train	23%	-8

ACTIVITIES

Natural sights, nature	66%	+10
<u>Thermal health spa</u>	<u>30%</u>	<u>+12</u>
<u>Selfness, digital-detox, etc.</u>	<u>23%</u>	<u>+15</u>
Gastronomy	42%	-2
Sightseeing of a town, the capital	58%	-5

MOTIVATION

Recommendations from friends	46%	+1
Proximity of the destination	19%	+1
Posts on social media, blogs	22%	-4
Past experience	30%	-9
Articles on the Internet	19%	-4

SOURCE OF INFORMATION

Agencies	22%	+0
Friends, family	42%	-9
Articles on the Internet	31%	-8
Blogs	30%	-3
Opinions in social media	25%	-3

RESERVATION METHOD

Agency	32%	+2
<u>Organiser</u>	<u>10%</u>	<u>+3</u>
Booking.com	60%	-4
Airbnb	20%	-3
At the activity provider	7%	-1

TRAVELLING WITH

As a couple	54%	+1
Friends	15%	+1
Family	26%	-3
Alone	6%	+0

CHARACTERISTICS:

Size*	1.384.978
Share*	5%
Age	39
Women	50%

Spring	27%
Summer	58%
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.

SPAIN: Active nostalgists (6,6%)



DESTINATION TYPE

In the mountains	85%	+48
Elsewhere in nature	60%	+30
By a lake	50%	+29
Countryside	30%	+10
By the sea	41%	-13

TYPE OF
ACCOMMODATION

Boutique hotel	30%	+13
Hotel	89%	+0
Camp	19%	+5
Camper	15%	+9
Tourist farm	11%	+5

TRANSPORT TO THE
DESTINATION

Motorhome (camper)	5%	+3
Aeroplane	76%	+0
Train	2%	+1
Bicycle	1%	+1
Car	14%	-4

TRANSPORT AT THE
DESTINATION

Car	80%	+8
Motorhome (camper)	8%	+4
Train	22%	-8
Bicycle	3%	+0
Coach	17%	-16

ACTIVITIES

Sports activities	48%	+25
Visit to a wine cellar	27%	+11
Natural sights, nature	52%	-4
Countryside, farm activities	18%	+3
Mountaineering (more challenging tours)	17%	+3

MOTIVATION

Past experience	41%	+2
Recommendations from friends	39%	-6
Travel literature	15%	-3
Travel presentations	14%	+5
Proximity of the destination	15%	-2

SOURCE OF
INFORMATION

Web portals (TripAdvisor etc.)	43%	-2
Friends, family	42%	-8
Articles on the Internet	32%	-8
Agencies	21%	-1
Travel literature	18%	+0

RESERVATION METHOD

Agency	34%	+3
Expedia.com	27%	+2
Organiser	8%	+1
At the activity provider	8%	+0
Booking.com	58%	-6

TRAVELLING WITH

As a couple	61%	+8
Family	26%	-2
Alone	8%	+3
Friends	6%	-8

CHARACTERISTICS:

Size*	1.104.639
Share*	4%
Age	38
Women	37%

Spring	25%
Summer	59%
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.

SPAIN: Beauty and indulgence lovers (4,9%)



DESTINATION TYPE

By the sea	92%	+39
Spas (wellness and spa)	38%	+27
In the mountains	25%	-11
Towns	38%	-24
Capitals	29%	-19

TYPE OF
ACCOMMODATION

Hotel	91%	+2
Staying with relatives or friends	22%	+2
Boutique hotel	20%	+2
Own accommodation	10%	+2
Private accommodation (e.g. Airbnb)	21%	+0

TRANSPORT TO THE
DESTINATION

Car	26%	+8
Train	1%	+0
Aeroplane	73%	-3

TRANSPORT AT THE
DESTINATION

Car	82%	+10
Coach	25%	-8
On foot	7%	-4
Bicycle	1%	-1
Train	12%	-19

ACTIVITIES

Sun and sea	74%	+31
Wellness and spa	51%	+28
Recreation	45%	+17
Shopping	43%	+10
Activities and fun for children	34%	+18

MOTIVATION

Recommendations from friends	51%	+6
Past experience	41%	+1
Popularity of the destination	31%	+1
Suitability of the destination in all seasons	28%	+2
Price of the destination	34%	-4

SOURCE OF
INFORMATION

Friends, family	66%	+16
Web portals (TripAdvisor etc.)	44%	-1
Blogs	37%	+5
Agencies	27%	+5
Articles on the Internet	33%	-6

RESERVATION METHOD

Agency	39%	+8
Directly at the accommodation provider	18%	-3
Own accommodation	8%	+3
Expedia.com	21%	-4
Other web portal	7%	+0

TRAVELLING WITH

As a couple	54%	+1
Family	38%	+10
Friends	6%	-8
Alone	2%	-3

CHARACTERISTICS:

Size*	824.199
Share*	3%
Age	40
Women	63%

Spring	24%
Summer	62%
Shorter trips	2
Longer trips	1

SPAIN: Adventurists (3,3%)



DESTINATION TYPE

In the mountains	75%	+38
Elsewhere in nature	52%	+21
By a lake	48%	+28
Countryside	37%	+18
By the sea	17%	-36

TYPE OF
ACCOMMODATION

Tourist farm	26%	+19
Camper	21%	+14
Camp	22%	+9
Hostel	25%	+4
Hotel	51%	-38

TRANSPORT TO THE
DESTINATION

Motorhome (camper)	16%	+14
Car	23%	+5
Motorcycle	7%	+6
Aeroplane	50%	-26
Ship or another vessel	2%	+1

TRANSPORT AT THE
DESTINATION

Motorhome (camper)	27%	+23
Coach	38%	+5
Motorcycle	11%	+8
Car	46%	-26
Bicycle	9%	+6

ACTIVITIES

Mountaineering (more challenging tours)	59%	+45
Water sports activities	50%	+34
Adrenaline sports challenges	41%	+31
History and castles	57%	+1
Winter sports	29%	+18

MOTIVATION

Travel literature	27%	+8
Travel presentations	22%	+13
Past experience	42%	+3
Videos on the Internet	23%	+6
Recommendations from friends	37%	-8

SOURCE OF
INFORMATION

Travel literature	34%	+15
Friends, family	44%	-6
Blogs	30%	-2
Opinions in social media	28%	+1
Articles in print media	22%	+5

RESERVATION METHOD

Expedia.com	28%	+3
Agoda.com	19%	+13
Organiser	16%	+9
Through official TICs	9%	+1
Booking.com	53%	-12

TRAVELLING WITH

Friends	29%	+15
As a couple	61%	+9
Relatives	2%	+2
Alone	6%	+1
Family	2%	-27

CHARACTERISTICS:

Size*	547.472
Share*	2%
Age	34
Women	31%

Spring	21%
Summer	55%
Shorter trips	4
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.

SPAIN: Carefree youth (2,9%)



DESTINATION TYPE

Towns	83%	+21
By the sea	70%	+17
Countryside	32%	+13
Capitals	44%	-3
By a lake	19%	-1

TYPE OF
ACCOMMODATION

Hostel	73%	+51
Staying with relatives or friends	33%	+13
Camp	30%	+17
Camper	19%	+12
Glamping	12%	+10

TRANSPORT TO THE
DESTINATION

Motorcycle	4%	+4
Car	21%	+2
Motorhome (camper)	4%	+1
Coach	2%	+1
Aeroplane	69%	-8

TRANSPORT AT THE
DESTINATION

Motorcycle	14%	+11
Car	70%	-2
Coach	34%	+1
Motorhome (camper)	10%	+6
Bicycle	8%	+5

ACTIVITIES

Sun and sea	54%	+10
Social events, festivals	49%	+19
Nightlife (bars, clubs)	46%	+22
Music festivals and concerts	46%	+23
Recreation	38%	+10

MOTIVATION

Price of the destination	44%	+5
Proximity of the destination	33%	+15
Past experience	40%	+1
TV ads	18%	+5
Posts on social media, blogs	25%	+0

SOURCE OF
INFORMATION

Friends, family	54%	+4
Articles on the Internet	40%	+1
Blogs	36%	+3
Web forums	28%	+3
Web portals (TripAdvisor etc.)	42%	-4

RESERVATION METHOD

Airbnb	30%	+8
Expedia.com	26%	+1
Own accommodation	10%	+4
Booking.com	56%	-8
At the activity provider	9%	+2

TRAVELLING WITH

Friends	37%	+23
As a couple	39%	-14
Alone	11%	+6
Family	13%	-15

CHARACTERISTICS:

Size*	482.977
Share*	2%
Age	33
Women	32%

Spring	17%
Summer	64%
Shorter trips	3
Longer trips	2

SPAIN: Active families (2,5%)



DESTINATION TYPE

<u>In the mountains</u>	75%	+38
<u>By a lake</u>	55%	+34
<u>Elsewhere in nature</u>	58%	+28
<u>Countryside</u>	30%	+10
<u>By the sea</u>	42%	-12

TYPE OF ACCOMMODATION

<u>Apartment</u>	89%	+41
<u>Own accommodation</u>	26%	+18
<u>Hostel</u>	31%	+9
<u>Camp</u>	24%	+11
<u>Staying with relatives or friends</u>	29%	+9

TRANSPORT TO THE DESTINATION

Car	21%	+3
Motorhome (camper)	5%	+2
Aeroplane	74%	-2

TRANSPORT AT THE DESTINATION

Coach	33%	+0
<u>Motorhome (camper)</u>	10%	+6
<u>Motorcycle</u>	10%	+6
<u>Bicycle</u>	9%	+6
Car	58%	-14

ACTIVITIES

<u>Sports activities</u>	66%	+44
<u>Mountaineering (more challenging tours)</u>	59%	+45
<u>Water sports activities</u>	43%	+27
<u>Adrenaline sports challenges</u>	36%	+26
<u>Thermal health spa</u>	39%	+21

MOTIVATION

Videos on the Internet	28%	+11
<u>Travel presentations</u>	25%	+16
<u>Past experience</u>	48%	+9
Web ads	25%	+17
Articles on the Internet	25%	+2

SOURCE OF INFORMATION

Blogs	40%	+7
<u>Articles in print media</u>	38%	+21
Articles on the Internet	38%	-1
Travel presentations	23%	+13
Web forums	25%	+0

RESERVATION METHOD

Expedia.com	36%	+11
<u>Agoda.com</u>	18%	+12
Agency	35%	+4
<u>Organiser</u>	17%	+10
Booking.com	63%	-2

TRAVELLING WITH

As a couple	59%	+7
Friends	15%	+1
Family	21%	-8
Alone	5%	+0

CHARACTERISTICS:

Size*	411.861
Share*	1%
Age	37
Women	37%

Spring	18%
Summer	59%
Shorter trips	3
Longer trips	2

SPAIN: Devoted mothers (1,7%)



DESTINATION TYPE

In the mountains	61%	+25
By a lake	55%	+34
By the sea	48%	-6
Elsewhere in nature	30%	+0
Countryside	28%	+9

TYPE OF
ACCOMMODATION

Apartment	73%	+25
Tourist farm	48%	+42
Camp	23%	+10
Glamping	17%	+14
Boutique hotel	20%	+3

TRANSPORT TO THE
DESTINATION

Car	23%	+5
Motorhome (camper)	9%	+6
Aeroplane	68%	-8

TRANSPORT AT THE
DESTINATION

Car	77%	+5
Motorcycle	9%	+5
Coach	17%	-16
Motorhome (camper)	6%	+2
Train	10%	-20

ACTIVITIES

Activities and fun for children	40%	+25
Sports activities	36%	+13
Countryside, farm activities	33%	+18
Adrenaline sports challenges	28%	+18
Learning about the local way of life	33%	+10

MOTIVATION

TV programmes	39%	+14
Travel presentations	32%	+24
Articles in print media	24%	+11
TV ads	22%	+9
Articles on the Internet	23%	+0

SOURCE OF
INFORMATION

Opinions in social media	46%	+19
Friends, family	46%	-4
Articles in print media	23%	+5
Travel literature	21%	+2
Travel presentations	16%	+7

RESERVATION METHOD

Agency	35%	+4
Organiser	17%	+10
At the activity provider	13%	+6
Airbnb	24%	+2
Expedia.com	24%	-1

TRAVELLING WITH

As a couple	50%	-2
Friends	15%	+2
Relatives	3%	+3
Family	25%	-3
Alone	6%	+1

CHARACTERISTICS:

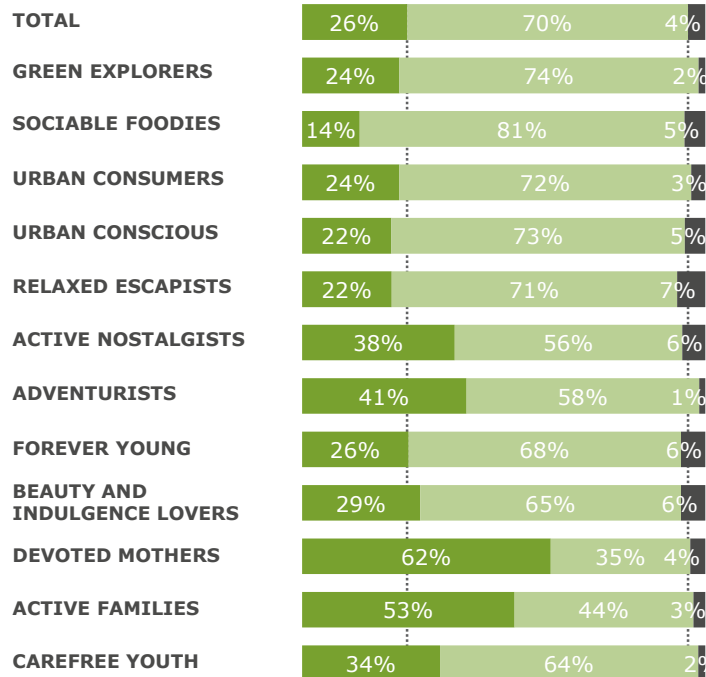
Size*	282.146
Share*	1%
Age	35
Women	62%

Spring	11%
Summer	64%
Shorter trips	3
Longer trips	2

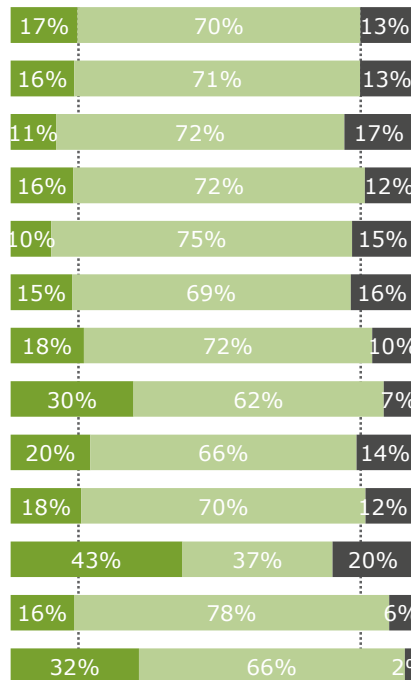
SPAIN: Price sensitivity



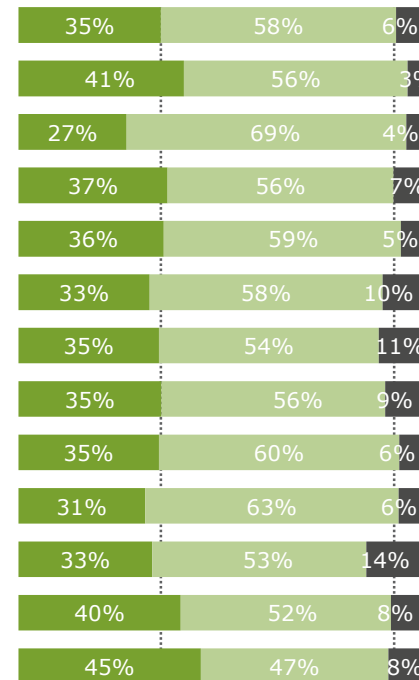
CHOICE OF ACCOMMODATION



CHOICE OF DESTINATION



CHOICE OF TRANSPORT

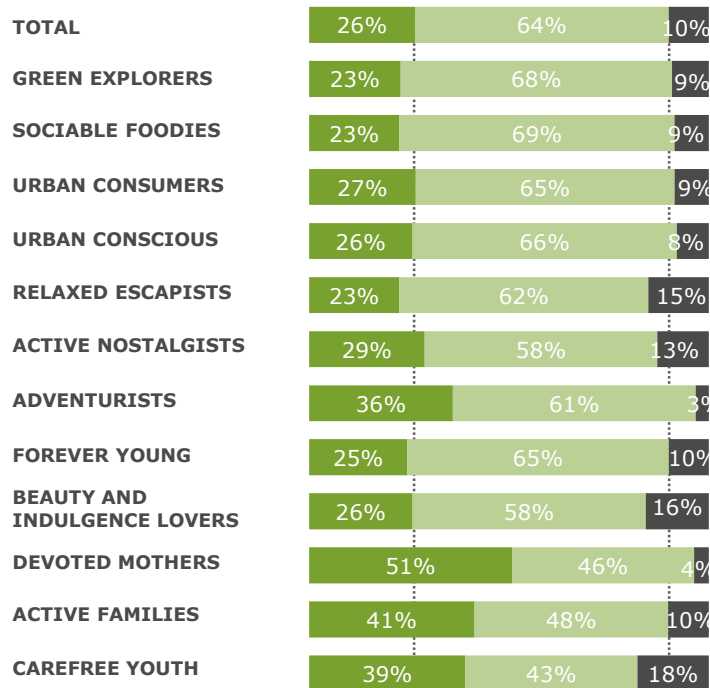


seek the most favourable offer
 assess value for money
 disregard the price

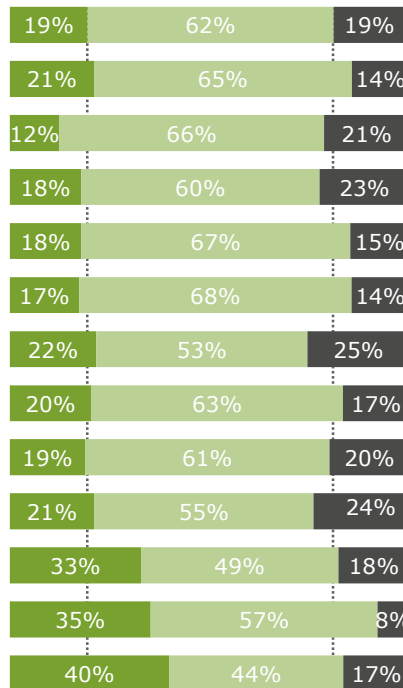
SPAIN: Price sensitivity



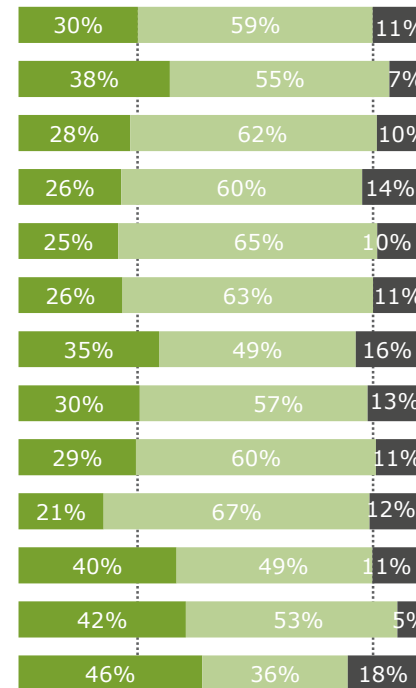
CHOICE OF ADDITIONAL ACTIVITIES



CHOICE OF FOOD



SHOPPING

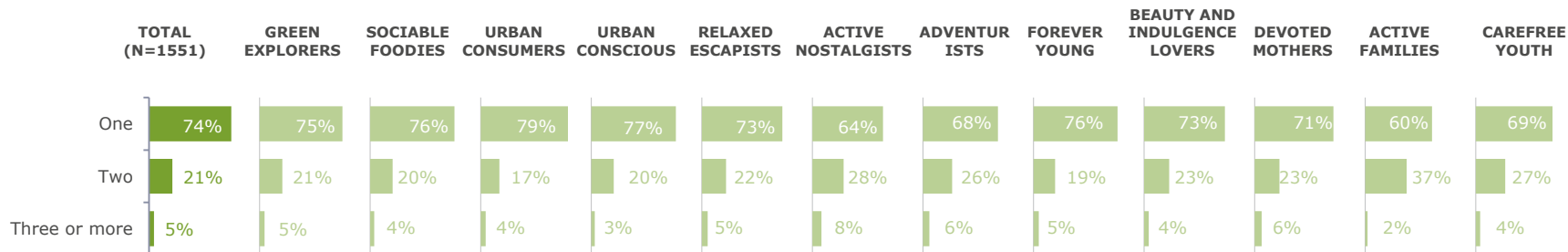


seek the most favourable offer
 assess value for money
 disregard the price

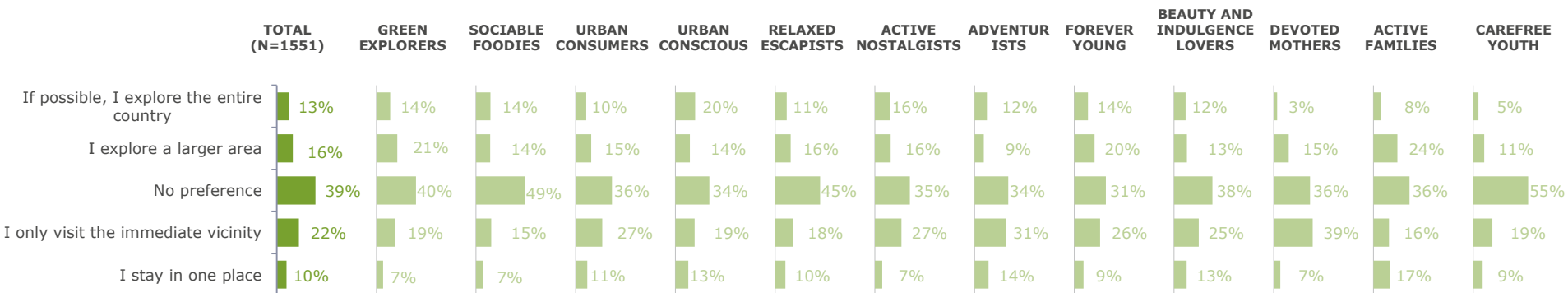
SPAIN: Level of exploration



Number of countries visited during one trip, break or holiday



Exploring in one country



GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY



SPAIN: General travel habits and motives



CHARACTERISTICS OF THE TARGET GROUP:

Size*	16.788.761	Spring	21%
Share*	56,3%	Summer	59%
Age	40	Shorter trips	2
Women	46%	Longer trips	1

TRAVELLING WITH:

As a couple	53%
Family	28%
Friends	14%
Alone	5%

DESTINATION TYPE:

Towns	22%	62%
By the sea	25%	53%
Cultural and historical centres	18%	51%

3 x

a year
travels
abroad

ACTIVITIES - TOP 10:

Sightseeing of old town centres	67%
Sightseeing of a town, the capital	63%
History and castles	56%
Natural parks, attractions	56%
Tourist sights	48%
Museums, galleries, art	45%
Gastronomic delights	44%
Sun and sea	44%
Shopping	34%
Social events, festivals	30%

TRAVEL MOTIVES - TOP 10:

To learn something new	22%	47%
Experience another culture	8%	38%
Visit a beautiful destination	11%	37%
Visit a town, the capital	12%	34%
Retreat from the everyday	9%	28%
Spend time with partner	7%	24%
Rest, slow down the pace of life	4%	19%
Experience diversity	4%	18%
Spend time with family, strengthen the bonds	5%	18%
Enjoy good food, drinks	2%	17%

VISITING COUNTRIES - TOP 10:

France	39%	54%
Italy	37%	45%
Spain	24%	42%
Portugal	26%	40%
United Kingdom of Great Britain and Northern Ireland	24%	35%
Germany	20%	28%
Non - European countries	14%	21%
Andorra	9%	20%
Belgium	9%	18%
the Netherlands	10%	15%
Slovenia	2%	2%

Repeated visit

Visit

NOTES:

The results represent the target group: everyone who travels abroad at least once a year for a break or holiday. The data refer to trips to European destinations. / CHARACTERISTICS OF THE TARGET GROUP: The size and share show the size of the target group according to the population aged between 18 and 65. / TRAVELLING WITH: people with whom they travel. / DESTINATION TYPE: what type of destination is chosen. / ACTIVITIES - TOP 10: what do they do. / TRAVEL MOTIVES - TOP 10: what are their purposes for travelling (the main one and other reasons). / VISITING COUNTRIES: which countries have they visited so far and would visit again (Top 10, compared with Slovenia).

SPAIN: Elements of the purchase journey and consumption



TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Private accommodation: 20%

Relatives, friends: 20%

Boutique hotel : 18%

RESERVATION:

UP TO 3
months in advance

87%

TRANSPORT MODE (%):

AEROPLANE CAR MOTORHOME TRAIN COACH

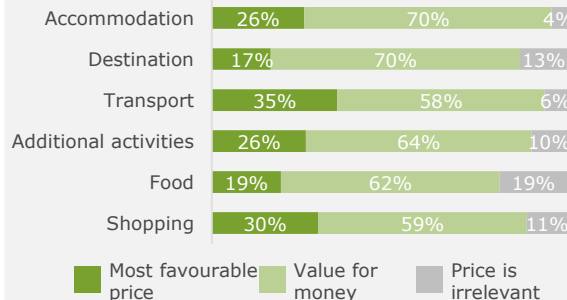


76 - 18 72 3 4 1 31 1 33

□ To the destination

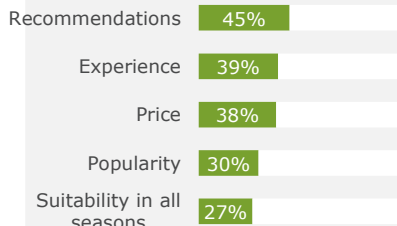
■ At the destination (12% ON FOOT, 3% MOTORCYCLE, 3% BICYCLE)

PRICE SENSITIVITY:

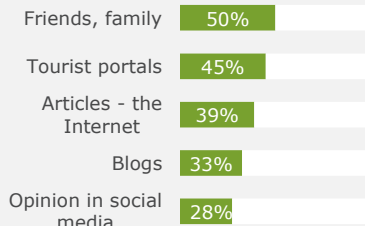


PURCHASE JOURNEY:

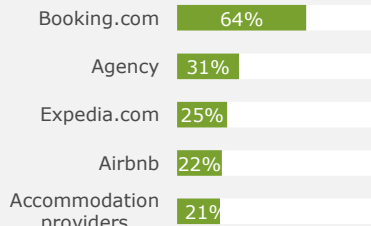
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	69 €	66 €
TRANSPORT per person	142 €	153 €

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.

SPAIN: General travel habits and motives

Subsample: visitors to Slovenia



CHARACTERISTICS OF VISITORS TO SLOVENIA:

Size*	2.215.719	Spring	18%
Share*	7,4%	Summer	61%
Age	37	Shorter trips	4
Women	47%	Longer trips	2

TRAVELLING WITH:

As a couple	62%
Family	18%
Friends	12%
Alone	7%

DESTINATION TYPE:

Towns	17%	50%
In the mountains	19%	50%
By the sea	21%	47%

6 x

a year
travels
abroad

ACTIVITIES - TOP 10:

Sightseeing of a town, the capital	51%
Natural parks, attractions	51%
Sightseeing of old town centres	49%
History and castles	46%
Museums, galleries, art	39%
Sports activities	38%
Sun and sea	36%
Tourist sights	35%
Gastronomic delights	32%
Wellness and (beauty) spa	32%

TRAVEL MOTIVES - TOP 10:

To learn something new	13%	35%
Visit a beautiful destination	8%	32%
Experience another culture	9%	30%
Spend time with partner	10%	29%
Retreat from the everyday	10%	24%
Clear one's head, gather thoughts	7%	23%
Visit a town, the capital	8%	21%
Rest, slow down the pace of life	2%	20%
Relaxation	7%	20%
Enjoy good food, drinks	4%	20%

VISITING COUNTRIES - TOP 10:

France	34%	47%
Italy	36%	45%
Spain	20%	40%
Portugal	23%	40%
United Kingdom of Great Britain and Northern Ireland	18%	34%
Germany	25%	33%
Belgium	14%	26%
Greece	18%	24%
Andorra	12%	24%
Ireland	14%	22%
Slovenia	9%	15%

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).

SPAIN: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia



TYPE OF ACCOMMODATION:



Other frequent accommodation types:

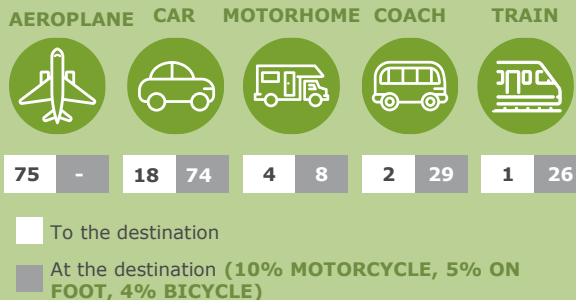
Boutique hotel : 29%
Relatives, friends: 20%
Private accommodation: 17%

RESERVATION:

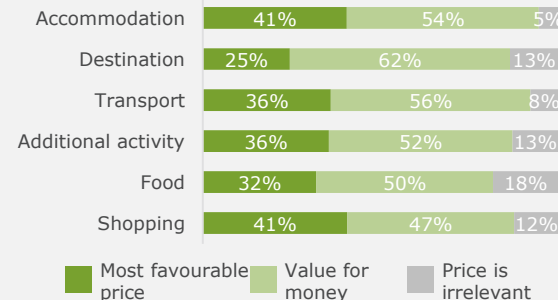


89%

TRANSPORT MODE (%):

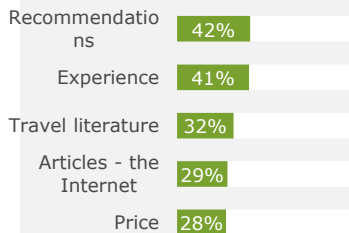


PRICE SENSITIVITY:

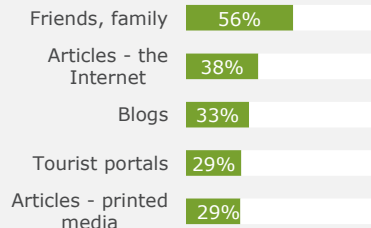


PURCHASE JOURNEY:

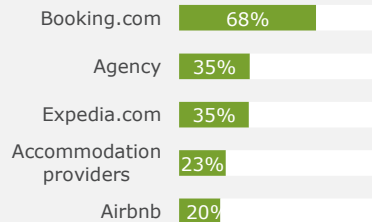
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	54 €	55 €
TRANSPORT per person	148 €	168 €

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.

SPAIN: General travel habits and motives

Subsample: tourists in Slovenia



CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size*	335.154	Spring	13%
Share*	1,1%	Summer	62%
Age	45	Shorter trips	3
Women	53%	Longer trips	2

TRAVELLING WITH:

As a couple	64%
Family	20%
Friends	2%
Alone	4%

DESTINATION TYPE:

Towns	33%	67%
Cultural and historical...	28%	60%
In the mountains	10%	49%

5 x

a year
travels
abroad

ACTIVITIES - TOP 10:

Sightseeing of a town, the capital	73%
Sightseeing of old town centres	72%
History and castles	66%
Museums, galleries, art	65%
Natural parks, attractions	64%
Gastronomic delights	43%
Shopping	40%
Touring	34%
Tourist sights	34%
Sun and sea	31%

TRAVEL MOTIVES - TOP 10:

To learn something new	16%	48%
Visit a beautiful destination	19%	41%
Spend time with partner	12%	38%
Experience another culture	10%	36%
Spend time with family, strengthen the bonds	15%	25%
Visit a town, the capital	3%	22%
Clear one's mind, gather thoughts	3%	22%
Enjoy good food, drinks	4%	20%
Contact with nature	3%	19%
Rest, slow down the pace of life	0%	18%

VISITING COUNTRIES - TOP 10:

Slovenia	59%	100%
France	50%	70%
Portugal	47%	70%
United Kingdom of Great Britain and...	28%	68%
Italy	50%	66%
Spain	33%	60%
Switzerland	38%	60%
Croatia	30%	58%
Belgium	25%	56%
Germany	43%	53%

■ 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).

SPAIN: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia



TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Boutique hotel : 21%
Relatives, friends: 21%
Private accommodation: 20%

RESERVATION :



79%

TRANSPORT MODE (%):

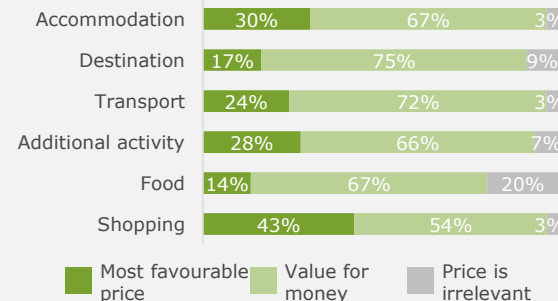
AEROPLANE CAR TRAIN COACH BICYCLE



□ To the destination

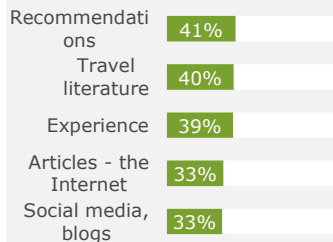
■ At the destination (4% MOTORCYCLE, 2% ON FOOT)

PRICE SENSITIVITY:

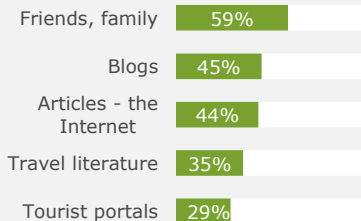


PURCHASE JOURNEY:

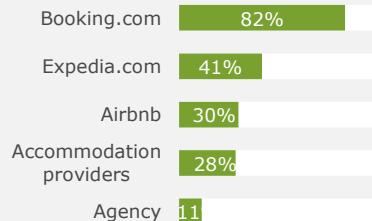
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	75 €	82 €
	in SLO	63 €	70 €
TRANSPORT per person	in Europe	168 €	226 €
	in SLO	174 €	240 €

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



SPAIN: Destination relevance

Share of visitors by popularity of the destination

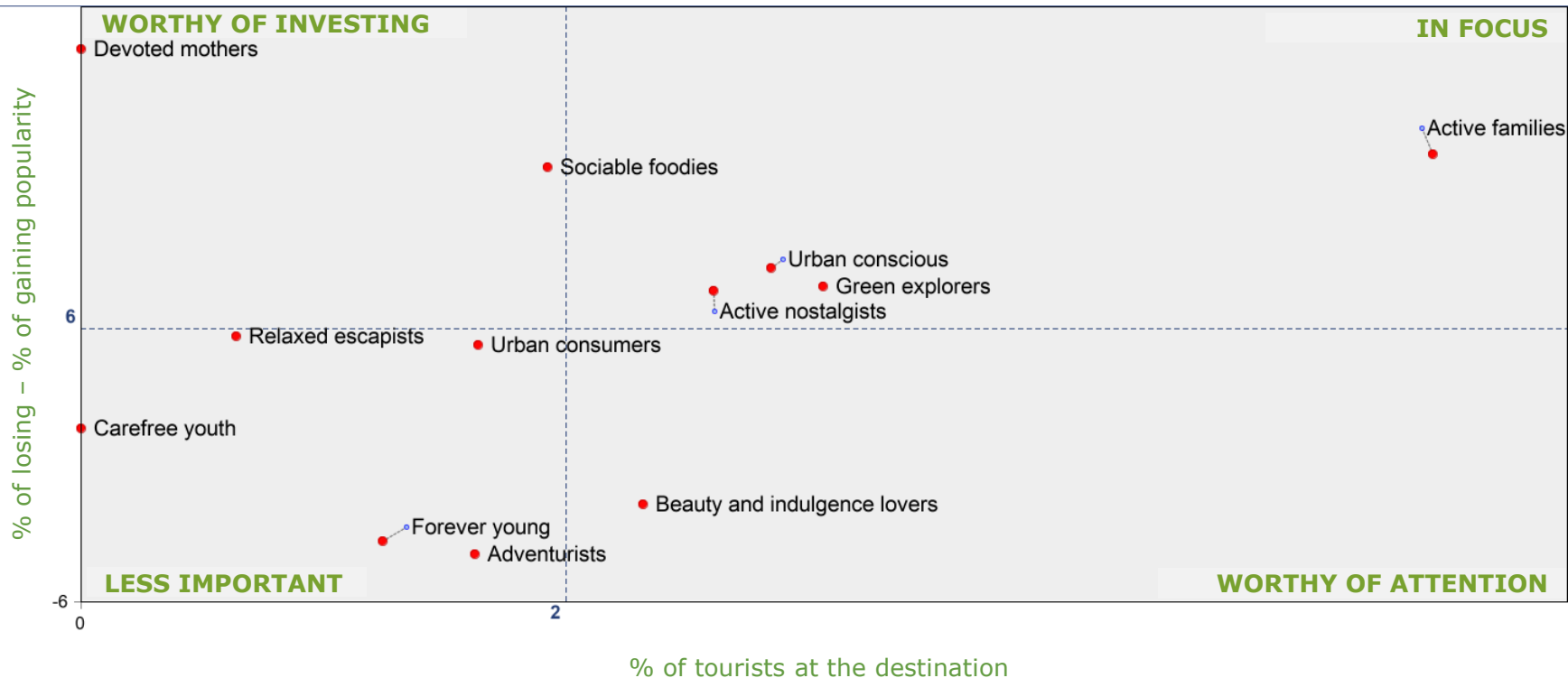


NOTES:

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).

SPAIN: Slovenia's relevance

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



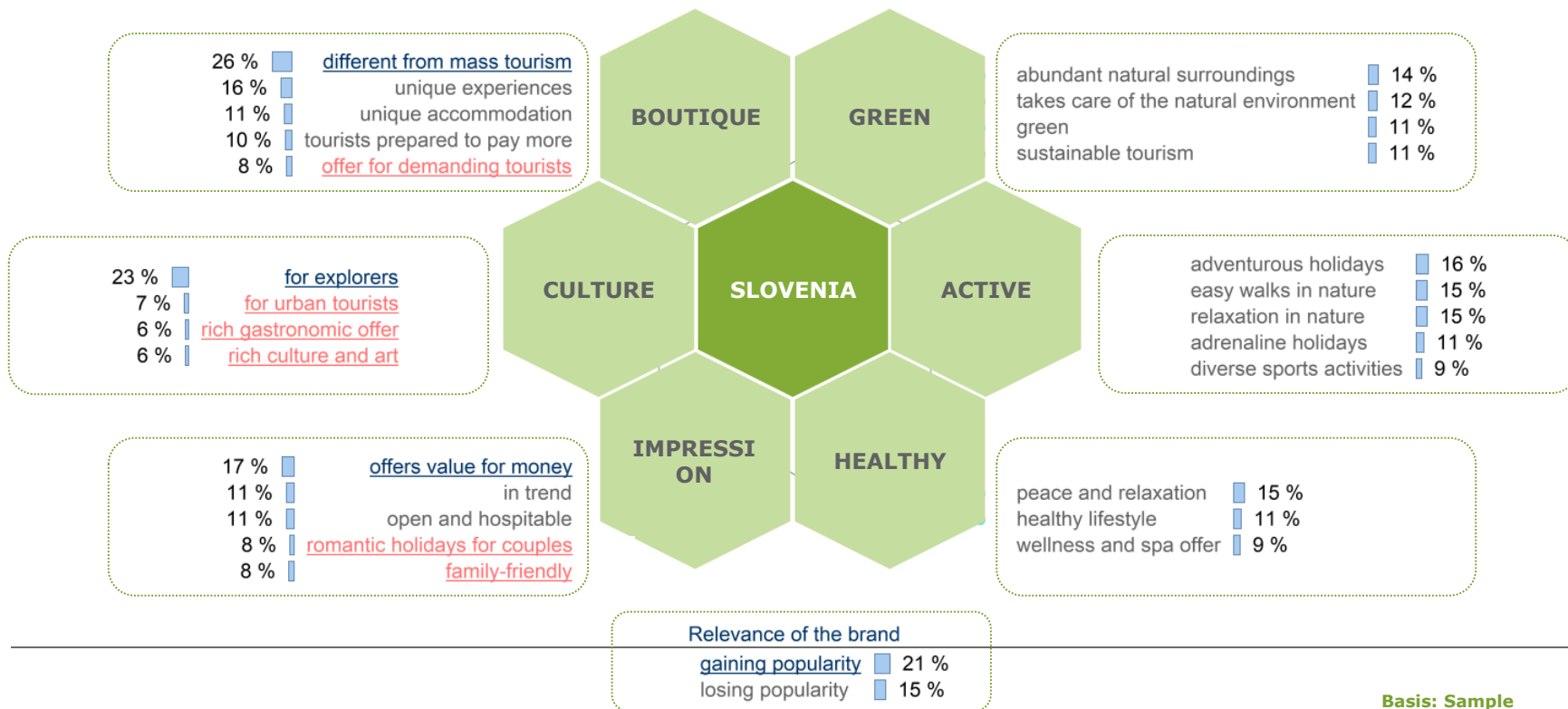
NOTES:

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).

SPAIN: Slovenia's image



n=1551



Basis: Sample

NOTES:

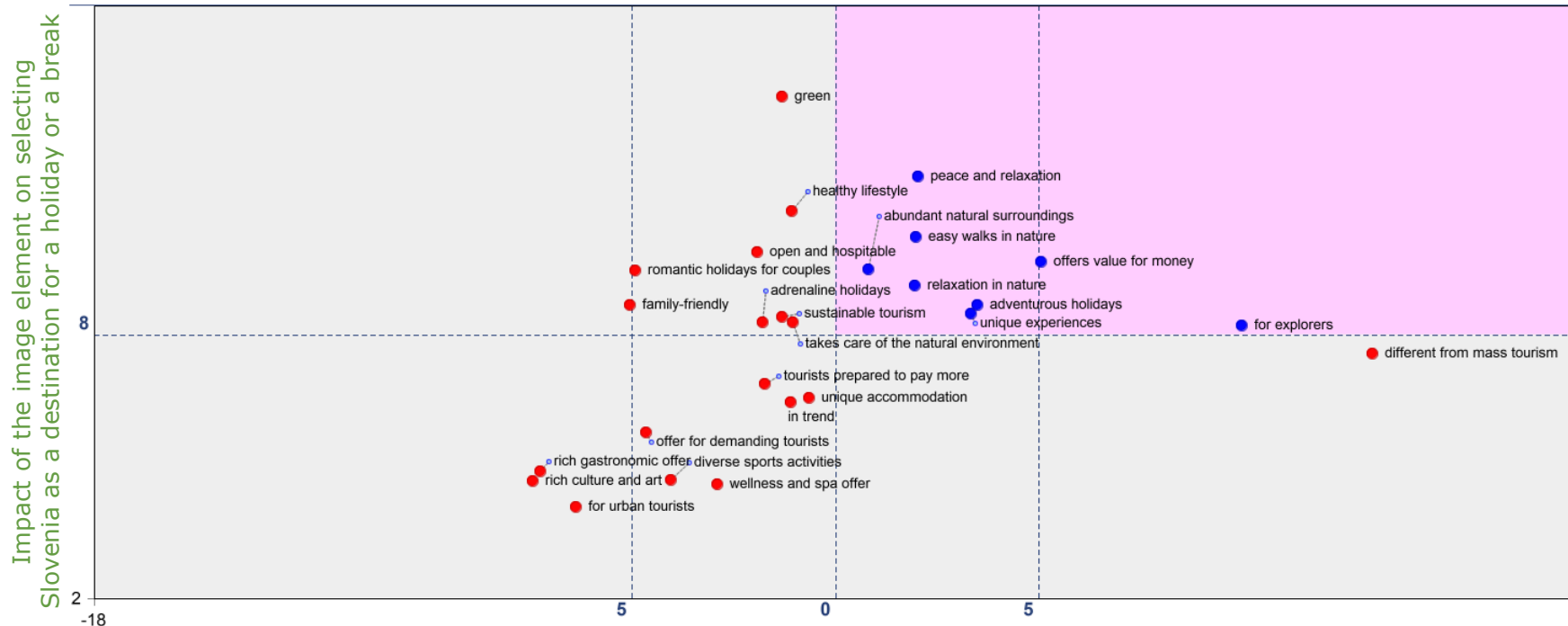
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

SPAIN: 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)



Weaker association of Slovenia ← → Stronger association of Slovenia

NOTES:

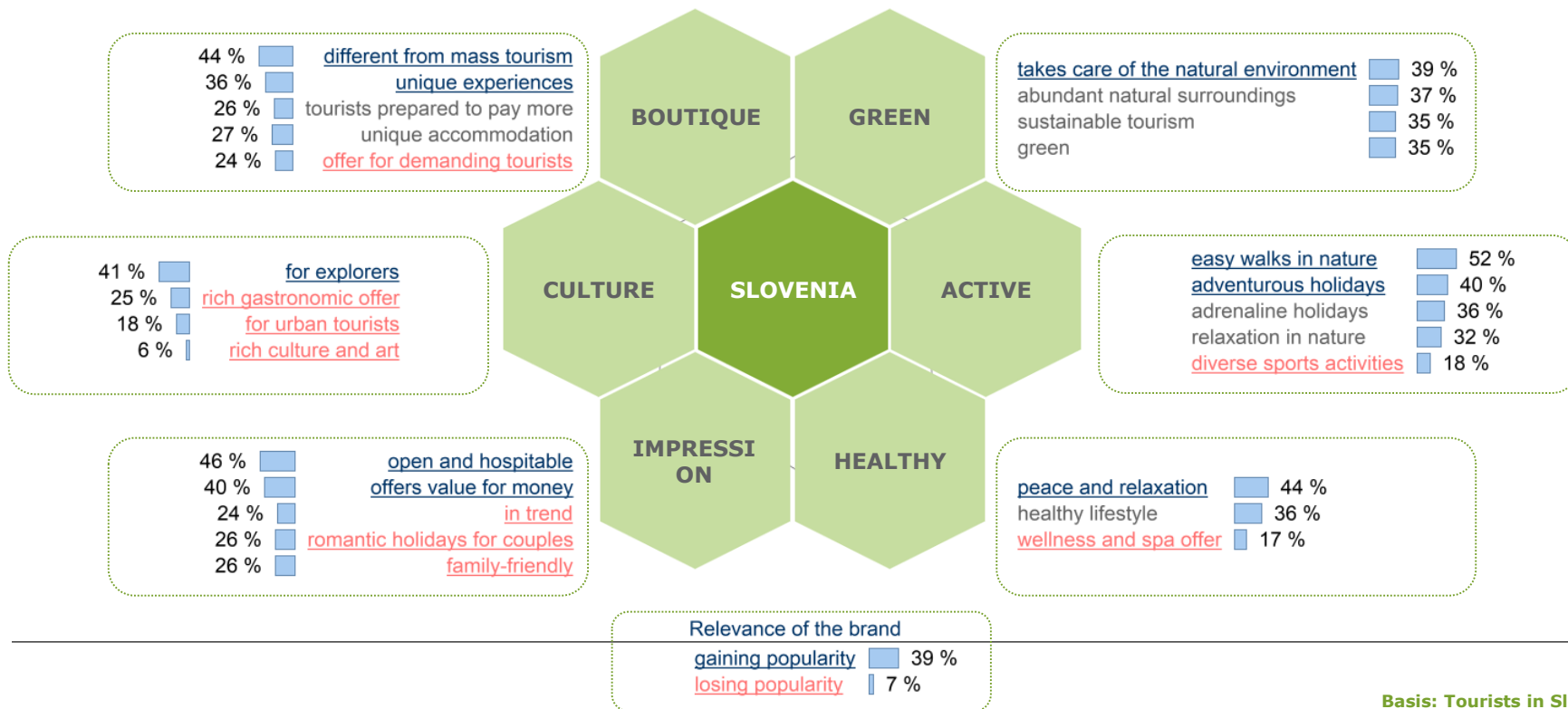
Guidelines for interpretation: elements in the upper right quadrant have a strong impact on the destination's image. These are the elements which influence an individual's decision to spend a holiday at a destination. The upper middle quadrant represents new opportunities.

SPAIN: Slovenia's image

Subsample: tourists in Slovenia



n=31



Basis: Tourists in Slovenia

NOTES:

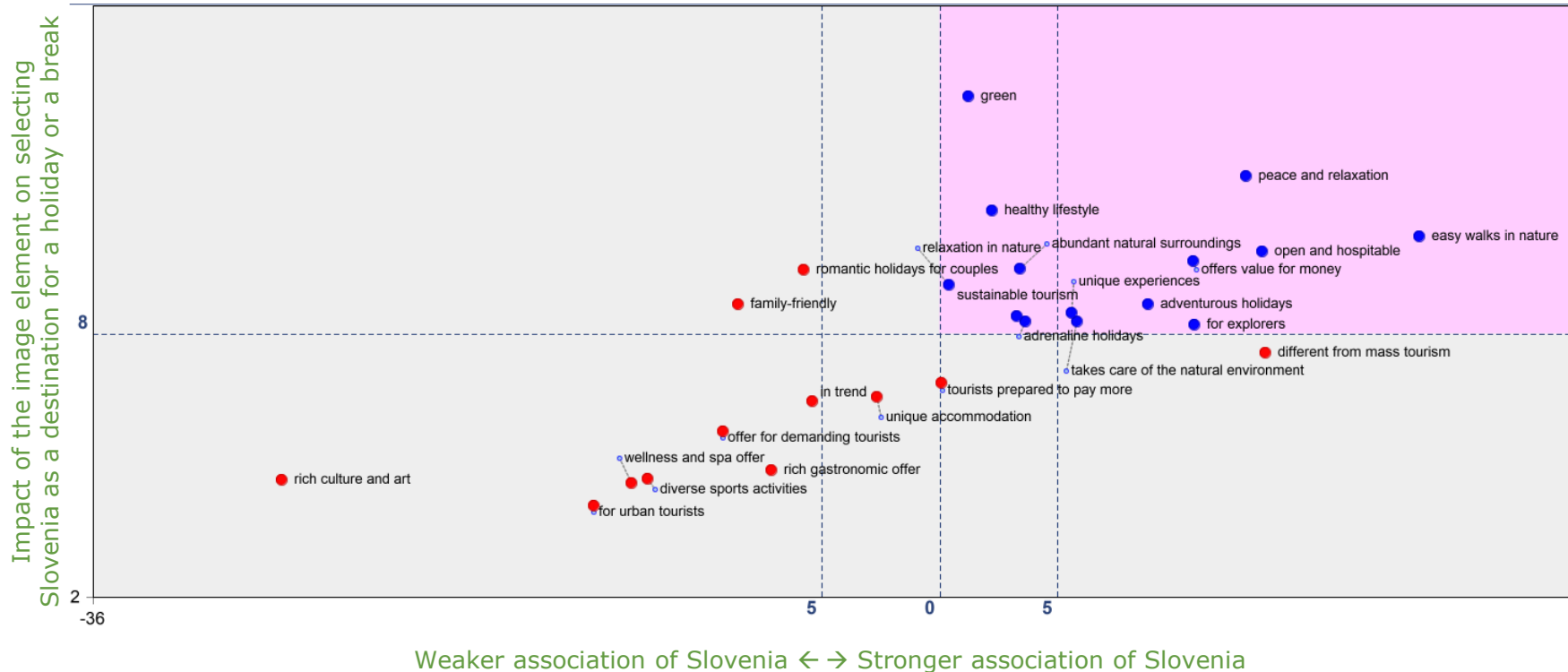
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

SPAIN: Significance of elements

Impact of elements on selecting Slovenia as a destination for a holiday or a break
Subsample: tourists in Slovenia



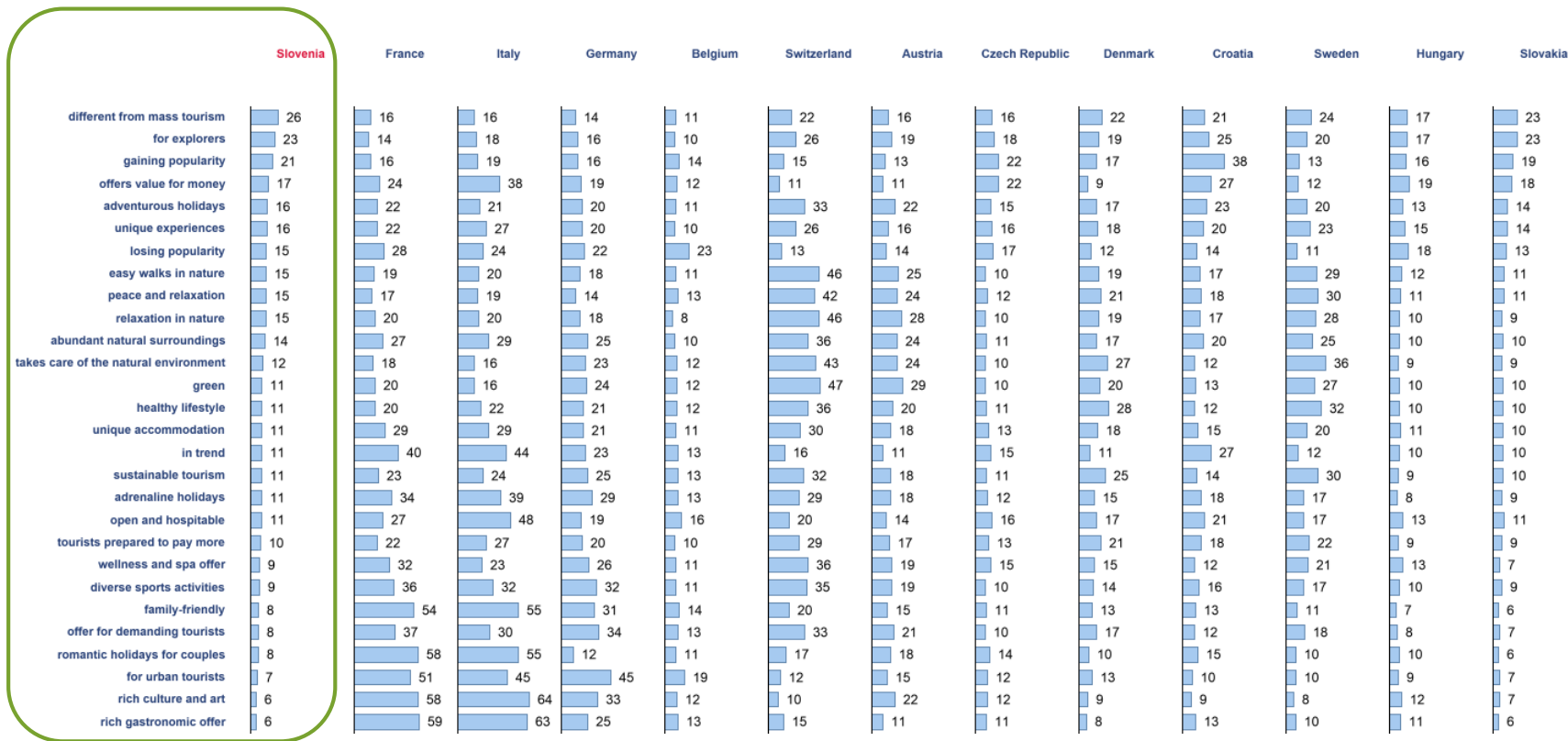
* interesting elements are in the upper section of the image (influential), the best ones are on the right side (important)



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.

SPAIN: 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.

SPAIN: 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

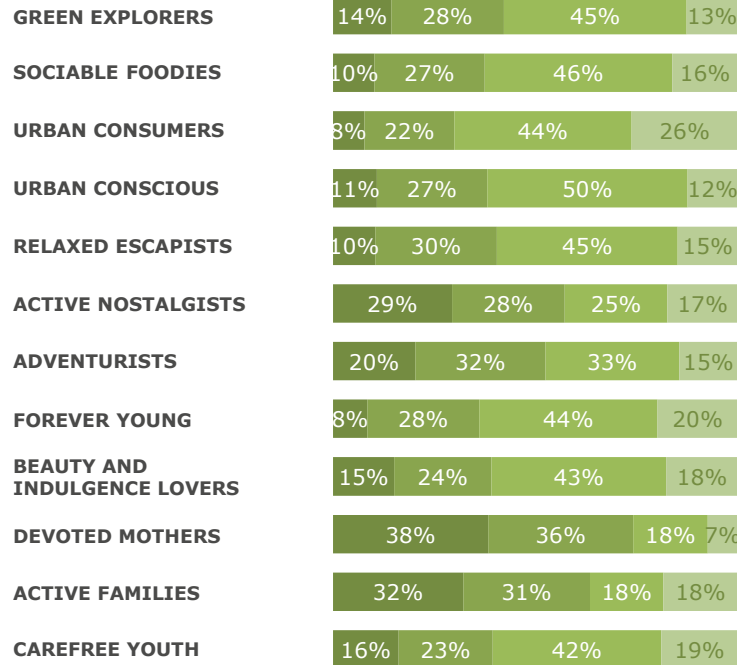


SPAIN: Knowledge of, and experience with, Slovenia

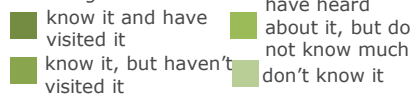


KNOWLEDGE OF SLOVENIA

Base: sample

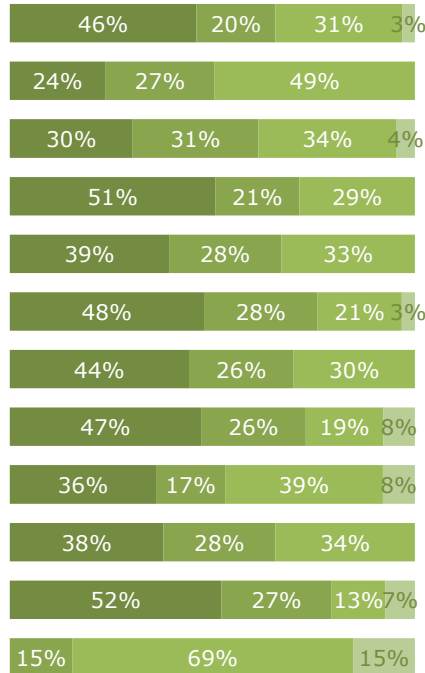


Knowledge:



SATISFACTION

Base: visitors of Slovenia

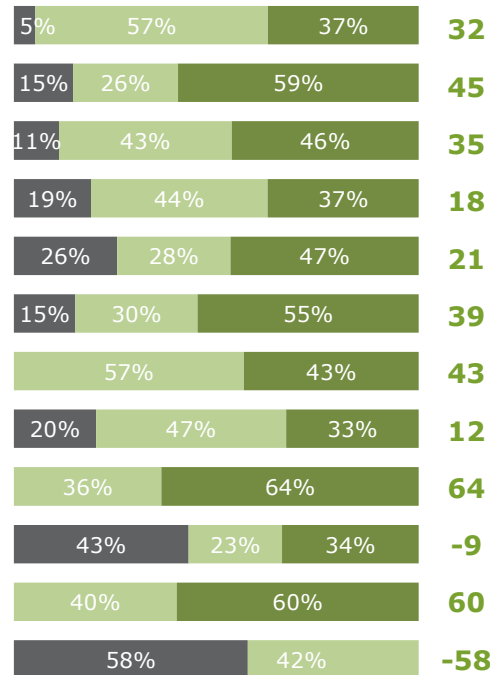


Meeting of expectations:



NPS – DEGREE OF RECOMMENDATION

NPS Index



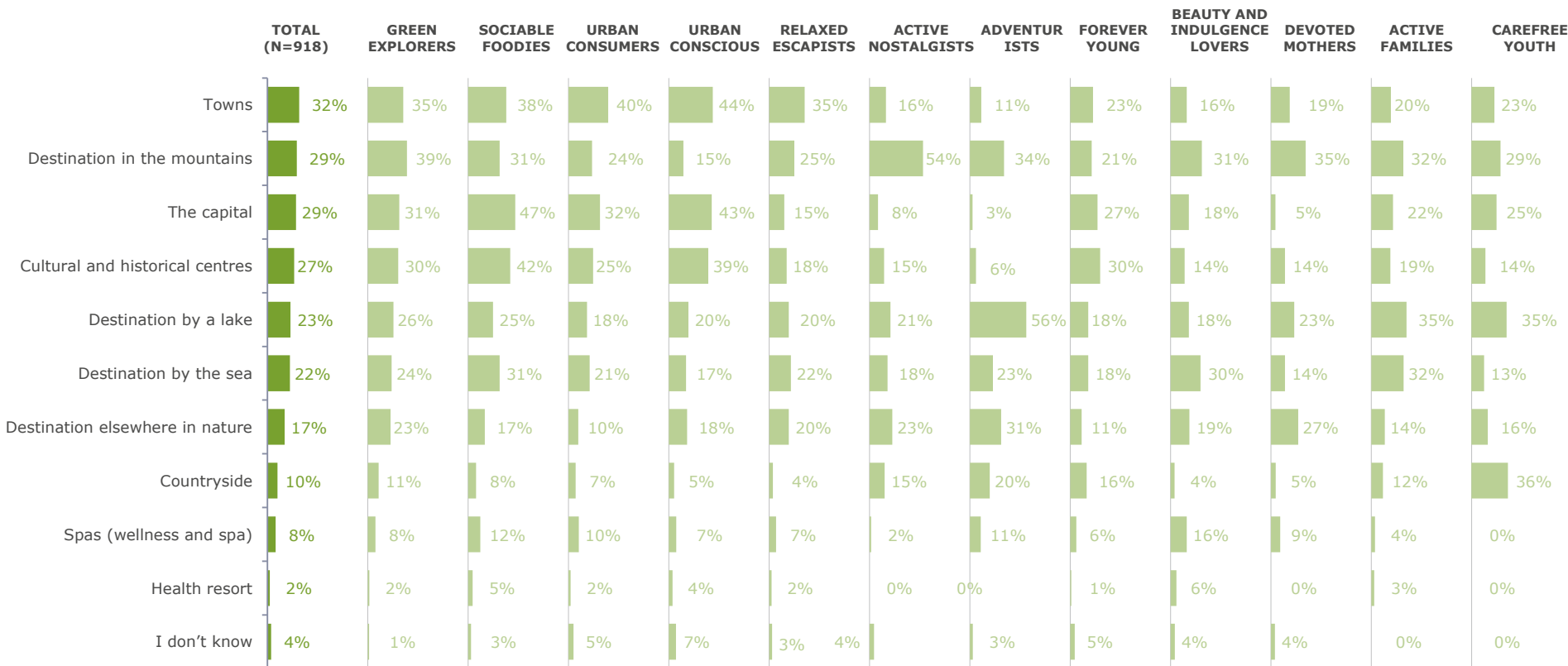
Recommendations:



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.

SPAIN: Destination type in Slovenia

Subsample: visitors to Slovenia

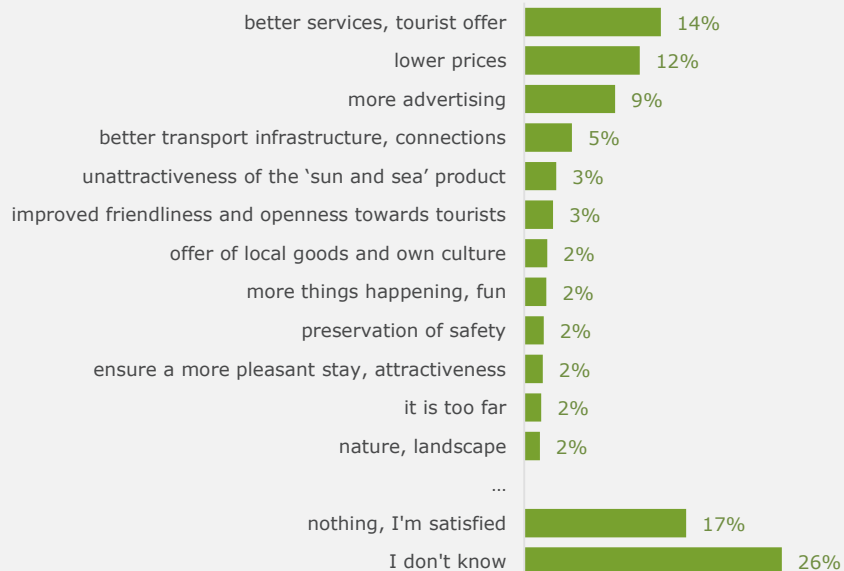


NOTES:

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=112

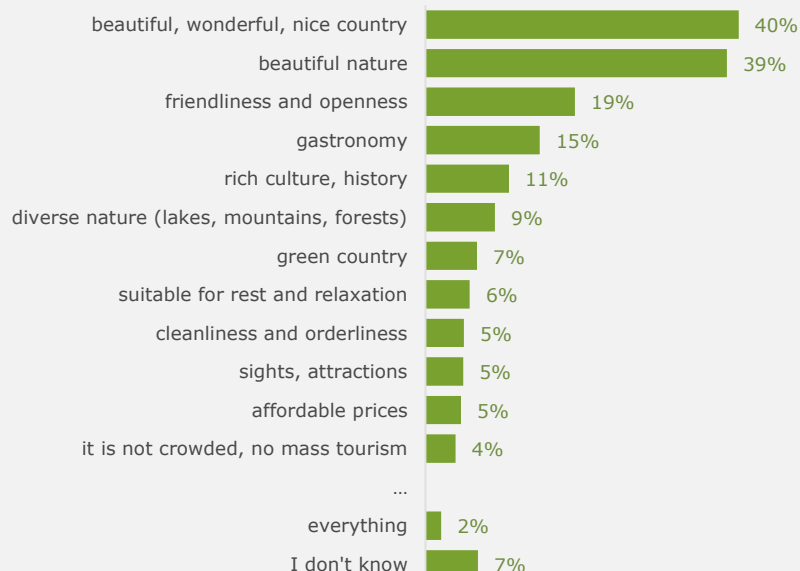


NOTES:

OTHER STATEMENTS: more information and information points, I'm not familiar enough, more hotel capacities, accommodation, gastronomy, higher quality hotels, accommodation, better cleanliness, orderliness

Elements of excitement – Top 12

Promoters (would recommend Slovenia), n=93

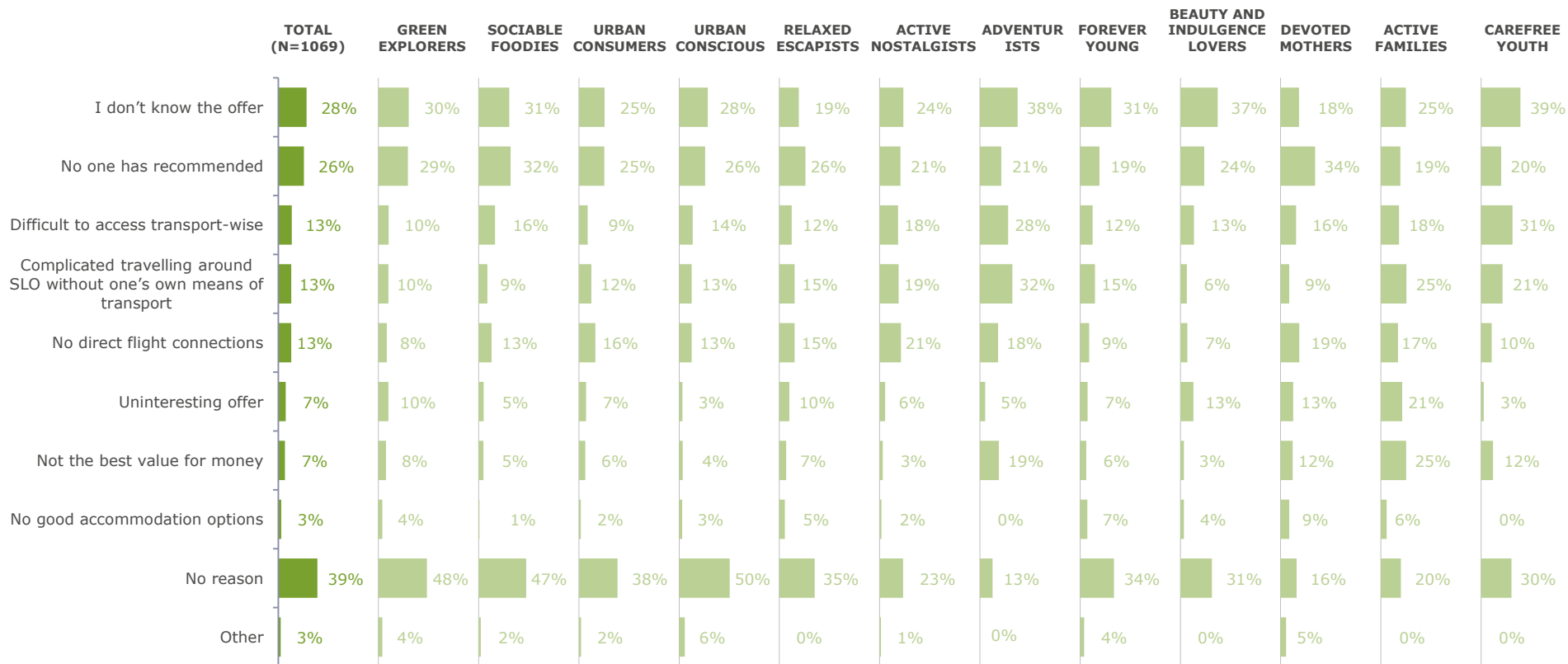


NOTES:

OTHER STATEMENTS: good tourist offer, attractiveness of the 'sun and sea' product, good and high-quality services, proximity, location, activities, recreation, accommodation, pleasant, fun atmosphere

SPAIN: 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

SPAIN: Green explorers (14,4%)



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



DESTINATION TYPE

Cultural 76% +25

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

TYPE OF

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 20% +2

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

TRANSPORT AT THE
DESTINATION

Coach 40% +7

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

ACTIVITIES

Sightseeing of old town centres 87% +20

Natural 82% +26

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

MOTIVATION

Recommendations from friends 50% +5

Popular 34% +5

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

SOURCE OF
INFORMATION

Friends, family 56% +6

Articles on the Internet 49% +10

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

RESERVATION METHOD

Booking.com 73% +9

Airbnb 33% +11

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

TRAVELLING WITH

As a couple 57% +4

Family 28% +0

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

CHARACTERISTICS:

Size* **2.418.763**
Share* **8%**
Age **39**
Women **45%**

Spring **20%**
Summer **59%**
Shorter trips **2**
Longer trips **1**

SPAIN: 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*	16.788.761	21%
Share*	56,3%	59%
Age	40	2
Women	46%	1

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

TRAVELLING WITH:

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

Friends	14%
Alone	5%

DESTINATION TYPE:

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

Cultural and historical...	18%	33%	51%
----------------------------	-----	-----	-----

3 x

year

Frequency of travelling abroad irrespective of the length

ACTIVITIES - TOP 10:

Sightseeing old town	67%
Visiting friends and family	48%
Relaxing on a beach	45%
Museums, galleries and art	45%
Gastronomic delights	44%
Sun and sea	44%
Shopping	34%
Social events, festivals	30%

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

TRAVEL MOTIVES - TOP 10:

Trying something new	22%	47%
Relaxation	19%	28%
Retreat from the everyday	9%	28%
Spend time with partner	7%	24%
Rest, slow down the pace of life	4%	19%
Experience diversity	4%	18%
Spend time with family, strengthen bonds	5%	18%
Enjoy in good food, drinks	2%	17%

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)

VISITING COUNTRIES - TOP 10:

France	39%	54%
Non-European countries	14%	21%
Andorra	9%	20%
Belgium	9%	18%
The Netherlands	10%	15%
Slovenia	2%	

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)

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).

SPAIN: Elements of the purchase journey and consumption



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

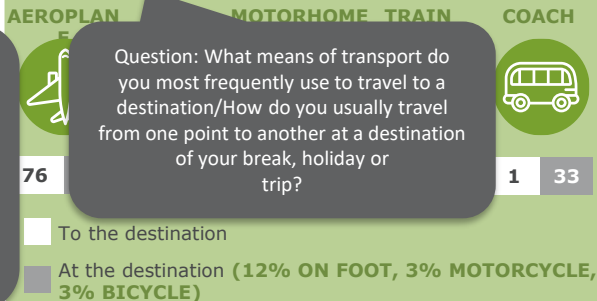
TYPE OF ACCOMMODATION:

Top 3 most frequent accommodation types are shown in icons. Less frequent accommodation types are given in the text. Question: What type of accommodation do you usually seek for your break, holiday or trip? Classify according to your most towards your least frequent accommodation type. (several replies)

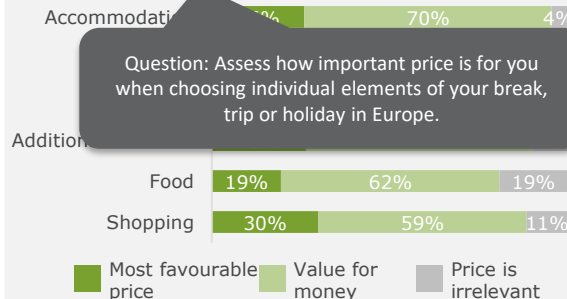
RESERVATION:

Question: How far in advance do you usually book your break, holiday or trip in Europe? The data show the most frequently stated response and also include all other temporally shorter statements.

TRANSPORT MODE (%):



PRICE SENSITIVITY:



MOTIVATION:

SOURCES OF

RESERVATION METHOD:

Top 5 replies – Questions: What stimulates your interest the most in a destination when you start thinking about/Where do you look for information when you want to educate yourself about a certain destination of/How do you usually book your break, holiday or trip in Europe? (several replies)

Price	38%	Articles - the Internet	39%	Expedia.com	25%
Popularity	30%	Blogs	33%	Airbnb	22%
Suitability of the destination in all...	27%	Opinions on social media	28%	Accommodation providers	21%

BUDGET AND SPENDING:

	PLANNED	ACTUAL
per person	142 €	155 €

Question: Think about your last holiday or break in Europe/stay in Slovenia (subsample: tourists in Slovenia) where you spent at least two nights and assess the planned and actual costs of your trip. The costs are calculated per person on the basis of additional verification of the number of persons and the number of days the trip lasted.

NOTES:

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



VALICON Ljubljana

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

VALICON Sarajevo

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

VALICON Zagreb

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

VALICON Beograd

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