



IDENTIFICATION OF MARKET POTENTIAL

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

AUSTRIA

December 2017



Contracting Authority

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STATEMENT ON THE PROTECTION OF RESPONDENTS' PERSONAL DATA

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

INTRODUCTION





8
countries



REPRESENTATIVE SAMPLE

23.647

respondents



12.380

representatives of
the target group



2.771

tourists and visitors
to Slovenia

12
PERSONAS



T = 19:15

Average duration of the survey



14 November – 5 December 2017

Period of data collection

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

VALICON

Global provider of web panels:

**research
now®**



About the project

VALICON conducted a global online survey, 'Identification of market potential,' for the Slovenian Tourist Board, which took place simultaneously on 8 target markets:

- **Italy,**
- **Austria,**
- **Germany,**
- **United Kingdom,**
- **France,**
- **the Russian Federation,**
- **the Netherlands, and**
- **Poland.**





Content of the survey

The survey was used to examine:

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



Substantive sets according to the level of analysis

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

ENTIRE TARGET GROUP

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

VISITORS TO SLOVENIA (subsample 1)

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

TOURISTS IN SLOVENIA (subsample 2)

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

DISPLAY OF RESULTS:

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

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

- **market structure** (personas)

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

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



About the Contractor

VALICON

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

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

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



Panel presentation

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

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



METHODOLOGY



Methodological framework of the survey



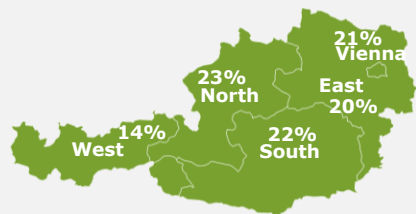
Method of implementation	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
Country of implementation	Austria
Implementation period	17 November – 24 November 2017
Target group	Citizens of a certain country, who <u>travel abroad at least once a year for a break, holiday or a trip and spend at least two nights there.</u>
Sample	<p>Entire sample: n=2,337</p> <p>Target group: n=1,547</p> <p>Visitors to Slovenia: n=653</p> <p>Tourists in Slovenia: n=233</p>
Representativeness	<p>A target person was selected from the sample framework, which was representative of the population aged between 18 and 65.</p> <p>The data were weighted according to gender, age and region.</p>
Length of the questionnaire	Average duration of the survey: t=21:27



AUSTRIA: Sample demographics



REGIONS:



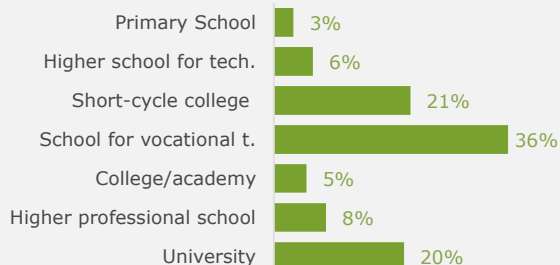
DETAILED DEFINITION OF REGIONS:

West: Tyrol, Vorarlberg. **North:** Upper Austria, Salzburg. **South:** Carinthia, Styria. **East:** Lower Austria, Burgenland. **Vienna.**

GENDER:



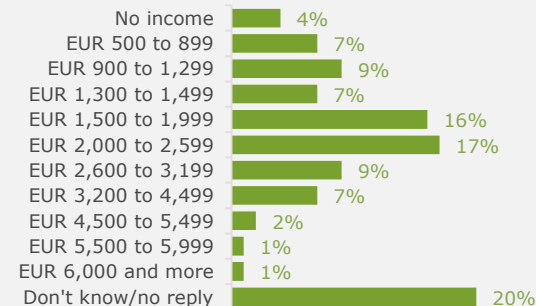
EDUCATION:



AGE:



PERSONAL INCOME:





Sample shares and sizes



Bordered ellipses show the basis for share calculations.



Basis: AUSTRIA (18–65 years)	
POPULATION (18–65 YEARS)	100.0%
TARGET GROUP	66.2%
VISITORS TO SLOVENIA	27.9%
TOURISTS IN SLOVENIA	10.0%

Basis: TARGET GROUP	
POPULATION (18–65 YEARS)	/
TARGET GROUP	100.0%
VISITORS TO SLOVENIA	43.0%
TOURISTS IN SLOVENIA	15.1%

Absolute size*	
	5,574,356
	3,691,730
	1,557,660
	555,678

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

MARKET STRUCTURE AND SIZE (PERSONAS)



AUSTRIA: Size of the potential



Top choice

0,4%

**NARROW
POTENTIAL**
Top choice +
repeated visit

12%

2%

**BROAD
POTENTIAL**
Choice

18%

57%

Visit or choice

21%

21%

AUT

n=1546

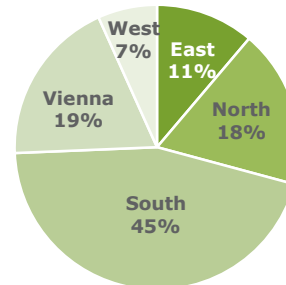
NARROW POTENTIAL:

12%

*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:	437,562
East	48,979
North	78,758
South	197,569
Vienna	82,766
West	29,491

REGIONAL CLASSIFICATION:



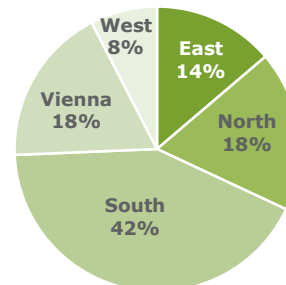
BROAD POTENTIAL:

18%

*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:	646,981
East	89,045
North	117,689
South	274,197
Vienna	116,899
West	49,151

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.

AUSTRIA: Size of segments by regions

BEAUTY AND
INDULGENCE LOVERS:

22.4%

827,715



URBAN CONSUMERS:

19.4%

716,841



GREEN EXPLORERS:

15.7%

577,759

		Total	East	North	South	Vienna	West
	%	100.0%	19.9%	23.1%	21.8%	21.5%	13.8%
	Size	3,691,730	733,035	851,290	805,927	792,703	508,775
GREEN EXPLORERS	Size (%)	15.7%	16.9%	24.7%	21.3%	22.7%	14.4%
	Size	577,759	97,509	142,540	122,986	131,347	83,376
SOCIABLE FOODIES	Size (%)	6.0%	24.8%	30.8%	9.4%	24.0%	11.0%
	Size	221,441	55,020	68,147	20,849	53,136	24,289
URBAN CONSUMERS	Size (%)	19.4%	17.6%	24.3%	21.6%	22.8%	13.8%
	Size	716,841	125,844	174,083	154,684	163,592	98,637
URBAN CONSCIOUS	Size (%)	5.2%	13.8%	19.2%	25.3%	29.3%	12.5%
	Size	192,575	26,485	37,012	48,664	56,364	24,051
RELAXED ESCAPISTS	Size (%)	6.4%	21.0%	29.9%	17.4%	15.9%	15.9%
	Size	237,034	49,759	70,838	41,226	37,584	37,627
ACTIVE NOSTALGISTS	Size (%)	5.0%	17.4%	22.5%	31.6%	16.4%	12.2%
	Size	186,047	32,295	41,770	58,856	30,513	22,613
ADVENTURISTS	Size (%)	1.8%	23.1%	15.6%	11.5%	29.9%	19.9%
	Size	68,174	15,716	10,643	7,832	20,410	13,573
FOREVER YOUNG	Size (%)	9.6%	29.9%	17.2%	20.4%	20.2%	12.4%
	Size	355,633	106,304	61,005	72,635	71,707	43,982
BEAUTY AND INDULGENCE LOVERS	Size (%)	22.4%	20.4%	22.7%	23.8%	18.6%	14.5%
	Size	827,715	168,763	188,177	196,638	154,250	119,888
DEVOTED MOTHERS	Size (%)	2.9%	20.2%	21.5%	22.3%	16.7%	19.3%
	Size	107,488	21,700	23,134	23,969	17,971	20,714
ACTIVE FAMILIES	Size (%)	2.6%	19.4%	21.5%	25.9%	23.0%	10.3%
	Size	97,407	18,855	20,958	25,208	22,356	10,029
CAREFREE YOUTH	Size (%)	2.8%	14.3%	12.6%	31.2%	32.2%	9.7%
	Size	103,618	14,805	13,103	32,304	33,375	10,031

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	80%
Towns	53%
By a lake	37%
In the mountains	33%
Spas (wellness and spa)	31%

TYPE OF
ACCOMMODATION

Hotel	86%
Apartment	52%
Private accommodation (e.g. Airbnb)	28%
Staying with relatives or friends	21%
Hostel	16%

TRANSPORT TO THE
DESTINATION

Car	45%
Aeroplane	44%
Train	4%
Motorhome (camper)	3%
Coach	2%

TRANSPORT AT THE
DESTINATION

Car	72%
Coach	31%
On foot	26%
Train	16%
Bicycle	7%

ACTIVITIES

Sun and sea	71%
Sightseeing of old town centres	57%
Sightseeing of a town, the capital	55%
Natural sights, nature	54%
Seeing major tourist attractions	51%

MOTIVATION

Past experience	51%
Recommendations from friends	51%
Articles on the Internet	32%
Price of the destination	30%
Popularity of the destination	21%

SOURCE OF
INFORMATION

Articles on the Internet	64%
Friends, family	54%
Web portals (TripAdvisor etc.)	28%
Travel literature	28%
Web forums	18%

RESERVATION METHOD

Booking.com	52%
Directly at the accommodation provider	40%
Agency	24%
Expedia.com	18%
Airbnb	13%

TRAVELLING WITH

As a couple	46%
Family	33%
Friends	15%
Alone	5%
Relatives	0%

CHARACTERISTICS:

Size*	3,691,730
Share*	66%
Age	40
Women	50%

Spring	15%
Summer	66%
Shorter trips	3
Longer trips	1

NOTES:

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.

AUSTRIA: Tourists in Slovenia (15.1%)



DESTINATION TYPE

Towns	64%	+10
Capitals	40%	+11
By a lake	45%	+8
Elsewhere in nature	38%	+10
By the sea	77%	-3

TYPE OF
ACCOMMODATION

Apartment	62%	+10
Private accommodation (e.g. Airbnb)	38%	+10
Hostel	21%	+5
Boutique hotel	18%	+6
Staying with relatives or friends	26%	+4

TRANSPORT TO THE
DESTINATION

Car	49%	+4
Motorhome (camper)	5%	-2
Motorcycle	3%	+2
Train	4%	+0
Aeroplane	37%	-8

TRANSPORT AT THE
DESTINATION

Car	75%	+3
Bicycle	12%	+5
Motorcycle	9%	+4
Train	19%	+3
Coach	28%	-3

ACTIVITIES

Seeing major tourist attractions	63%	+12
Sightseeing of old town centres	67%	+10
Sightseeing of a town, the capital	65%	+10
Learning about the local way of life	51%	+11
Gastronomy	46%	+11

MOTIVATION

Recommendations from friends	59%	+8
Proximity of the destination	25%	+8
Articles on the Internet	39%	+6
Past experience	57%	+6
Articles in print media	20%	+6

SOURCE OF
INFORMATION

Articles on the Internet	70%	+6
Friends, family	62%	+8
Travel literature	36%	+9
Articles in print media	21%	+7
Web portals (TripAdvisor etc.)	32%	+4

RESERVATION METHOD

Booking.com	59%	+8
Airbnb	19%	+7
Directly at the accommodation provider	46%	+5
Own accommodation	16%	+4
At the activity provider	13%	+4

TRAVELLING WITH

As a couple	53%	+7
Friends	19%	+4
Family	24%	-9
Alone	5%	-1

CHARACTERISTICS:

Size*	555,678
Share*	10%
Age	41
Women	47%

Spring	17%
Summer	65%
Shorter trips	3
Longer trips	2

NOTES:

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

n=233

AUSTRIA: Beauty and indulgence lovers (22.4%)



DESTINATION TYPE

By the sea	97%	+17
Spas (<u>wellness and spa</u>)	58%	+27
By a lake	36%	-1
In the mountains	25%	-8
Towns	36%	-17

TYPE OF
ACCOMMODATION

Hotel	90%	+4
Apartment	49%	-3
Camper	9%	+2
Boutique hotel	11%	-1
Camp	9%	-2

TRANSPORT TO THE
DESTINATION

Car	53%	+8
Motorhome (camper)	3%	+0
Aeroplane	41%	-4
Coach	1%	-1
Train	2%	-2

TRANSPORT AT THE
DESTINATION

Car	77%	+5
On foot	27%	+1
Bicycle	6%	-1
Coach	25%	-7
Train	9%	-7

ACTIVITIES

Sun and sea	90%	+20
Wellness and spa	64%	+21
Activities and fun for children	41%	+23
Shopping	57%	+17
Recreation	36%	+11

MOTIVATION

Price of the destination	38%	+8
Recommendations from friends	53%	+2
Popularity of the destination	25%	+5
Past experience	48%	-3
Proximity of the destination	19%	+2

SOURCE OF
INFORMATION

Friends, family	58%	+4
Web portals (TripAdvisor etc.)	28%	+0
Web forums	19%	+0
Articles on the Internet	60%	-4
Agencies	11%	+1

RESERVATION METHOD

Agency	31%	+7
Directly at the accommodation provider	39%	-1
Other web portal	10%	+0
Booking.com	47%	-4
Own accommodation	10%	-2

TRAVELLING WITH

Family	56%	+23
As a couple	33%	-13
Friends	8%	-7
Alone	2%	-3
Relatives	1%	+0

CHARACTERISTICS:

Size*	827,715
Share*	15%
Age	40
Women	57%

Spring	7%
Summer	80%
Shorter trips	3
Longer trips	1

AUSTRIA: Urban consumers (19.4%)



DESTINATION TYPE

Towns	77%	+23
By the sea	78%	-2
Capitals	28%	-2
By a lake	29%	-9
Spas (wellness and spa)	25%	-6

TYPE OF
ACCOMMODATION

Hotel	93%	+7
Staying with relatives or friends	21%	-1
Apartment	48%	-4
Boutique hotel	10%	-2
Own property (holiday cottage)	7%	+0

TRANSPORT TO THE
DESTINATION

Aeroplane	52%	+8
Coach	2%	+0
Motorcycle	1%	+0
Car	42%	-4
Motorhome (camper)	2%	-1

TRANSPORT AT THE
DESTINATION

Car	74%	+2
Coach	31%	+0
Train	17%	+1
On foot	24%	-2
Bicycle	6%	-1

ACTIVITIES

Shopping	63%	+23
Sightseeing of a town, the capital	72%	+18
Sun and sea	73%	+2
Wellness and spa	55%	+12
Seeing major tourist attractions	61%	+10

MOTIVATION

Price of the destination	35%	+5
Recommendations from friends	54%	+3
Popularity of the destination	31%	+10
Past experience	53%	+1
Articles on the Internet	32%	+0

SOURCE OF
INFORMATION

Articles on the Internet	65%	+1
Friends, family	56%	+1
Web portals (TripAdvisor etc.)	29%	+1
Web forums	19%	+1
Travel literature	27%	+0

RESERVATION METHOD

Booking.com	60%	+8
Expedia.com	23%	+6
Airbnb	13%	+0
Own accommodation	12%	+1
Agency	23%	-1

TRAVELLING WITH

As a couple	51%	+5
Friends	21%	+6
Family	23%	-9
Alone	5%	+0

CHARACTERISTICS:

Size*	716,841
Share*	13%
Age	38
Women	53%

Spring	17%
Summer	64%
Shorter trips	3
Longer trips	1

AUSTRIA: Green explorers (15.7%)



DESTINATION TYPE

In the mountains	63%	+29
Elsewhere in nature	57%	+29
Towns	78%	+25
By the sea	92%	+12
By a lake	62%	+24

TYPE OF
ACCOMMODATION

Apartment	69%	+17
Private accommodation (e.g. Airbnb)	38%	+10
Camp	14%	+3
Hostel	19%	+3
Staying with relatives or friends	24%	+3

TRANSPORT TO THE
DESTINATION

Car	48%	+2
Train	6%	+2
Motorhome (camper)	3%	+0
Coach	2%	+0
Aeroplane	40%	-4

TRANSPORT AT THE
DESTINATION

Coach	38%	+7
Train	22%	+5
On foot	31%	+5
Car	68%	-3
Bicycle	11%	+4

ACTIVITIES

Sightseeing of old town centres	80%	+22
Natural sights, nature	76%	+22
Sightseeing of a town, the capital	74%	+19
Sports activities	53%	+21
Learning about the local way of life	51%	+10

MOTIVATION

Recommendations from friends	60%	+8
TV programmes	28%	+8
Travel literature	28%	+8
Suitability of the destination in all seasons	25%	+9
Articles on the Internet	38%	+5

SOURCE OF
INFORMATION

Articles on the Internet	74%	+10
Travel literature	35%	+7
Friends, family	61%	+7
Articles in print media	19%	+5
Web portals (TripAdvisor etc.)	30%	+2

RESERVATION METHOD

Booking.com	59%	+7
Directly at the accommodation provider	51%	+10
At the activity provider	12%	+3
Airbnb	15%	+2
Expedia.com	16%	-2

TRAVELLING WITH

As a couple	51%	+4
Alone	7%	+2
Family	24%	-8
Friends	17%	+1
Relatives	1%	+0

CHARACTERISTICS:

Size*	577,759
Share*	10%
Age	40
Women	53%

Spring	22%
Summer	62%
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.

AUSTRIA: Forever young (9.6%)



DESTINATION TYPE

Spas (wellness and spa)	24%	-7
Cultural and historical centres	19%	-2
In the mountains	23%	-10
By the sea	64%	-16
Countryside	16%	-3

TYPE OF
ACCOMMODATION

Hotel	87%	+1
Camp	13%	+2
Camper	11%	+3
Staying with relatives or friends	21%	+0
Private accommodation (e.g. Airbnb)	27%	-1

TRANSPORT TO THE
DESTINATION

<u>Aeroplane</u>	<u>50%</u>	<u>+5</u>
<u>Coach</u>	<u>4%</u>	<u>+2</u>
<u>Ship or another vessel</u>	<u>2%</u>	<u>+1</u>
Motorhome (camper)	4%	+1
Car	35%	-10

TRANSPORT AT THE
DESTINATION

<u>Coach</u>	<u>37%</u>	<u>+5</u>
On foot	23%	-3
Motorcycle	6%	+1
Car	64%	-8
Train	12%	-4

ACTIVITIES

<u>Sightseeing of old town centres</u>	<u>77%</u>	<u>+19</u>
<u>History and castles</u>	<u>58%</u>	<u>+25</u>
<u>Seeing major tourist attractions</u>	<u>59%</u>	<u>+8</u>
<u>Sightseeing of a town, the capital</u>	<u>60%</u>	<u>+5</u>
<u>Thermal health spas</u>	<u>34%</u>	<u>+13</u>

MOTIVATION

<u>Travel literature</u>	<u>29%</u>	<u>+10</u>
Price of the destination	33%	+3
TV programmes	21%	+1
<u>Videos on the Internet</u>	<u>16%</u>	<u>+3</u>
Articles in print media	14%	+0

SOURCE OF
INFORMATION

<u>Travel literature</u>	<u>33%</u>	<u>+6</u>
<u>Opinions in social media</u>	<u>22%</u>	<u>+4</u>
Articles on the Internet	63%	-1
Agencies	15%	+5
Web portals (TripAdvisor etc.)	30%	+2

RESERVATION METHOD

<u>Agency</u>	<u>28%</u>	<u>+4</u>
<u>Other web portal</u>	<u>13%</u>	<u>+3</u>
Own accommodation	13%	+2
Directly at the accommodation provider	39%	-1
Through official TICs	10%	+3

TRAVELLING WITH

<u>As a couple</u>	<u>57%</u>	<u>+10</u>
<u>Alone</u>	<u>7%</u>	<u>+2</u>
Family	22%	-11
Friends	13%	-2
Relatives	1%	+1

CHARACTERISTICS:

Size*	355,633
Share*	6%
Age	43
Women	40%

Spring	17%
Summer	61%
Shorter trips	3
Longer trips	2

NOTES:

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AUSTRIA: Relaxed escapists (6.4%)



DESTINATION TYPE

Elsewhere in nature	23%	-5
Spas (wellness and spa)	16%	-14
By a lake	21%	-16
Countryside	13%	-7
By the sea	50%	-31

TYPE OF
ACCOMMODATION

<u>Hotel</u>	89%	+4
Staying with relatives or friends	19%	-2
Hostel	15%	-1
Tourist farm	8%	-1
Own property (holiday cottage)	7%	+1

TRANSPORT TO THE
DESTINATION

<u>Aeroplane</u>	51%	+6
Train	4%	+0
Motorhome (camper)	3%	+0
Ship or another vessel	1%	+1
Car	40%	-5

TRANSPORT AT THE
DESTINATION

Car	71%	-1
Coach	27%	-4
Motorcycle	6%	+1
Train	13%	-3
On foot	20%	-6

ACTIVITIES

<u>Natural sights, nature</u>	72%	+18
<u>Thermal health spas</u>	36%	+15
Gastronomy	39%	+4
Learning about the local way of life	40%	-1
<u>Countryside, farm activities</u>	13%	+3

MOTIVATION

TV programmes	20%	+1
Past experience	47%	-4
Videos on the Internet	13%	+0
Proximity of the destination	16%	-1
Articles on the Internet	28%	-4

SOURCE OF
INFORMATION

Articles on the Internet	63%	-1
Travel literature	26%	-1
Friends, family	51%	-3
Agencies	10%	+0
Web portals (TripAdvisor etc.)	24%	-4

RESERVATION METHOD

<u>Agency</u>	29%	+5
<u>Other web portal</u>	13%	+3
Airbnb	12%	+0
Booking.com	34%	-18
Expedia.com	15%	-3

TRAVELLING WITH

As a couple	46%	+0
Friends	18%	+3
<u>Alone</u>	9%	+4
Family	26%	-6

CHARACTERISTICS:

Size*	237,034
Share*	4%
Age	40
Women	50%

Spring	11%
Summer	54%
Shorter trips	3
Longer trips	2

NOTES:

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AUSTRIA: Sociable foodies (6.0%)



DESTINATION TYPE

Towns	85%	+31
Capitals	74%	+45
Cultural and historical centres	64%	+43
By the sea	91%	+11
Elsewhere in nature	47%	+19

TYPE OF ACCOMMODATION

Hotel	99%	+13
Boutique hotel	31%	+19
Private accommodation (e.g. Airbnb)	34%	+6
Apartment	57%	+5
Staying with relatives or friends	27%	+5

TRANSPORT TO THE DESTINATION

Aeroplane	50%	+6
Train	4%	+1
Coach	2%	+0
Car	41%	-4
Motorcycle	1%	+0

TRANSPORT AT THE DESTINATION

Car	79%	+7
Coach	40%	+8
Train	23%	+7
On foot	28%	+2
Motorhome (camper)	3%	+0

ACTIVITIES

Seeing major tourist attractions	93%	+42
Sightseeing of old town centres	91%	+34
Sightseeing of a town, the capital	90%	+35
History and castles	70%	+38
Natural sights, nature	87%	+33

MOTIVATION

Travel literature	28%	+9
Articles on the Internet	42%	+9
TV programmes	28%	+8
Suitability of the destination in all seasons	23%	+7
Popularity of the destination	26%	+6

SOURCE OF INFORMATION

Travel literature	40%	+12
Articles on the Internet	71%	+8
Web forums	29%	+10
Opinions in social media	24%	+6
Articles in print media	19%	+6

RESERVATION METHOD

Booking.com	64%	+12
Expedia.com	27%	+9
Other web portal	20%	+10
Directly at the accommodation provider	46%	+6
At the activity provider	13%	+4

TRAVELLING WITH

Family	43%	+10
As a couple	49%	+2
Relatives	1%	+0
Friends	6%	-9
Alone	2%	-4

CHARACTERISTICS:

Size*	221,441
Share*	4%
Age	42
Women	47%

Spring	16%
Summer	63%
Shorter trips	3
Longer trips	1

AUSTRIA: Urban conscious (5.2%)



DESTINATION TYPE

Towns	74%	+21
Capitals	54%	+25
Cultural and historical centres	37%	+16
Elsewhere in nature	24%	-4
Countryside	16%	-3

TYPE OF ACCOMMODATION

Hostel	50%	+34
Private accommodation (e.g. Airbnb)	48%	+20
Staying with relatives or friends	34%	+13
Apartment	53%	+1
Camp	18%	+6

TRANSPORT TO THE DESTINATION

Aeroplane	49%	+5
Train	19%	+15
Motorhome (camper)	4%	+1
Bicycle	2%	+2
Car	25%	-21

TRANSPORT AT THE DESTINATION

On foot	45%	+19
Train	45%	+28
Coach	41%	+10
Car	49%	-23
Bicycle	10%	+2

ACTIVITIES

Learning about the local way of life	87%	+46
Museums, galleries and art	69%	+45
Sightseeing of old town centres	89%	+32
Gastronomy	71%	+36
Sightseeing of a town, the capital	85%	+30

MOTIVATION

Past experience	62%	+11
Travel literature	31%	+12
Recommendations from friends	59%	+8
Articles on the Internet	41%	+8
Videos on the Internet	20%	+8

SOURCE OF INFORMATION

Travel literature	38%	+10
Web portals (TripAdvisor etc.)	37%	+9
Blogs	22%	+8
Articles on the Internet	64%	+1
Friends, family	55%	+1

RESERVATION METHOD

Booking.com	63%	+11
Airbnb	38%	+25
Expedia.com	21%	+4
Own accommodation	18%	+6
At the activity provider	11%	+2

TRAVELLING WITH

As a couple	48%	+1
Friends	22%	+7
Alone	13%	+8
Family	17%	-16

CHARACTERISTICS:

Size*	192,575
Share*	3%
Age	34
Women	58%

Spring	15%
Summer	66%
Shorter trips	3
Longer trips	1

AUSTRIA: Active nostalgists (5.0%)



DESTINATION TYPE

By a lake	57%	+20
<u>Elsewhere in nature</u>	52%	+23
<u>In the mountains</u>	53%	+19
By the sea	76%	-4
<u>Countryside</u>	29%	+9

TYPE OF
ACCOMMODATION

Hotel	90%	+4
<u>Boutique hotel</u>	22%	+11
Apartment	52%	+0
Tourist farm	8%	+0
Private accommodation (e.g. Airbnb)	19%	-9

TRANSPORT TO THE
DESTINATION

Car	55%	+9
<u>Motorcycle</u>	3%	+3
Motorhome (camper)	3%	+0
Coach	3%	+1
Aeroplane	35%	-9

TRANSPORT AT THE
DESTINATION

Car	82%	+10
<u>Motorcycle</u>	9%	+5
Coach	21%	-10
Train	11%	-6
On foot	14%	-12

ACTIVITIES

<u>Sports activities</u>	66%	+34
<u>Gastronomy</u>	44%	+8
<u>Winter sports</u>	27%	+9
<u>Visit to a wine cellar</u>	22%	+11
Natural sights, nature	54%	+0

MOTIVATION

Travel literature	21%	+1
Suitability of the destination in all seasons	17%	+1
Past experience	45%	-7
TV programmes	17%	-2
Articles on the Internet	23%	-9

SOURCE OF
INFORMATION

Articles on the Internet	58%	-6
Articles in print media	14%	+0
Travel literature	21%	-7
Travel presentations	10%	+2
Agencies	9%	-1

RESERVATION METHOD

Agency	23%	-1
Directly at the accommodation provider	38%	-2
Own accommodation	11%	-1
Booking.com	45%	-7
At the activity provider	7%	-2

TRAVELLING WITH

<u>As a couple</u>	67%	+21
Family	25%	-8
Alone	2%	-3
Friends	6%	-9

CHARACTERISTICS:

Size*	186,047
Share*	3%
Age	44
Women	36%

Spring	18%
Summer	58%
Shorter trips	3
Longer trips	1

AUSTRIA: Devoted mothers (2.9%)



DESTINATION TYPE

In the mountains	62%	+28
By a lake	54%	+17
By the sea	67%	-13
Countryside	24%	+4
Elsewhere in nature	20%	-8

TYPE OF
ACCOMMODATION

Apartment	84%	+32
Tourist farm	35%	+27
Private accommodation (e.g. Airbnb)	35%	+7
Staying with relatives or friends	31%	+10
Camp	23%	+12

TRANSPORT TO THE
DESTINATION

Car	81%	+36
Motorhome (camper)	3%	+0
Coach	2%	+0
Aeroplane	14%	-31

TRANSPORT AT THE
DESTINATION

Car	88%	+16
Bicycle	16%	+9
On foot	17%	-9
Motorcycle	6%	+2
Coach	17%	-14

ACTIVITIES

Activities and fun for children	48%	+30
Sports activities	53%	+21
Natural sights, nature	63%	+9
Countryside, farm activities	37%	+27
Wellness and spa	37%	-6

MOTIVATION

Past experience	64%	+13
Recommendations from friends	62%	+11
Proximity of the destination	22%	+5
Suitability of the destination in all seasons	13%	-3
Travel presentations	10%	+0

SOURCE OF
INFORMATION

Friends, family	59%	+5
Web forums	22%	+4
Opinions in social media	17%	+0
Travel literature	22%	-6
Articles on the Internet	53%	-11

RESERVATION METHOD

Directly at the accommodation provider	50%	+10
Own accommodation	18%	+6
Agency	18%	-6
At the activity provider	9%	+0
Expedia.com	15%	-3

TRAVELLING WITH

Family	60%	+27
Friends	12%	-3
As a couple	28%	-18

CHARACTERISTICS:

Size*	107,488
Share*	2%
Age	40
Women	46%

Spring	14%
Summer	69%
Shorter trips	3
Longer trips	2

AUSTRIA: Carefree youth (2.8%)



DESTINATION TYPE

<u>Towns</u>	74%	+21
By the sea	80%	+0
Capitals	35%	+6
By a lake	31%	-7
Cultural and historical centres	16%	-5

TYPE OF
ACCOMMODATION

<u>Hostel</u>	59%	+43
<u>Private accommodation (e.g. Airbnb)</u>	47%	+19
<u>Staying with relatives or friends</u>	34%	+13
<u>Camp</u>	22%	+11
Apartment	50%	-2

TRANSPORT TO THE
DESTINATION

<u>Motorcycle</u>	5%	+4
Train	5%	+2
Aeroplane	42%	-2
Coach	4%	+2
Motorhome (camper)	4%	+1

TRANSPORT AT THE
DESTINATION

<u>Coach</u>	41%	+9
Motorhome (camper)	9%	+6
On foot	27%	+1
<u>Train</u>	23%	+6
Car	57%	-15

ACTIVITIES

<u>Nightlife (bars, clubs)</u>	64%	+45
<u>Music festivals and concerts</u>	63%	+46
<u>Social events, festivals</u>	44%	+23
Seeing major tourist attractions	54%	+3
Sun and sea	66%	-4

MOTIVATION

<u>Articles on the Internet</u>	44%	+12
<u>Videos on the Internet</u>	27%	+15
Recommendations from friends	53%	+2
Past experience	47%	-4
Popularity of the destination	23%	+2

SOURCE OF
INFORMATION

<u>Opinions in social media</u>	36%	+19
Friends, family	58%	+4
Web forums	22%	+4
Articles on the Internet	59%	-5
Web portals (TripAdvisor etc.)	24%	-4

RESERVATION METHOD

<u>Airbnb</u>	24%	+11
Expedia.com	22%	+4
Other web portal	13%	+3
Booking.com	45%	-6
<u>Organiser</u>	9%	+4

TRAVELLING WITH

<u>Friends</u>	48%	+33
As a couple	31%	-15
Alone	4%	-1
Family	16%	-16

CHARACTERISTICS:

Size*	103,618
Share*	2%
Age	31
Women	30%

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

NOTES:

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AUSTRIA: Active families (2.6%)



DESTINATION TYPE

In the mountains	77%	+44
Elsewhere <u>in nature</u>	75%	+47
By the sea	78%	-2
By a lake	46%	+9
Countryside	27%	+7

TYPE OF
ACCOMMODATION

Apartment	79%	+27
Camp	19%	+7
Other	14%	+9
Private accommodation (e.g. Airbnb)	32%	+4
Hostel	19%	+3

TRANSPORT TO THE
DESTINATION

Car	50%	+5
Motorhome (camper)	5%	+2
<u>Motorcycle</u>	3%	+2
Coach	3%	+1
Aeroplane	39%	-6

TRANSPORT AT THE
DESTINATION

Car	83%	+11
<u>Motorcycle</u>	10%	+6
Motorhome (camper)	10%	+6
Coach	30%	-1
On foot	29%	+3

ACTIVITIES

Sports activities	77%	+45
Water sports activities	51%	+33
Mountaineering (more challenging tours)	46%	+38
Learning about the local way of life	58%	+17
Winter sports	40%	+22

MOTIVATION

Recommendations from friends	58%	+7
<u>Articles on the Internet</u>	42%	+10
<u>Proximity of the destination</u>	26%	+9
Posts on social media, blogs	24%	+12
Past experience	58%	+6

SOURCE OF
INFORMATION

Articles on the Internet	64%	+0
Friends, family	55%	+1
Blogs	19%	+5
Travel presentations	17%	+9
Web portals (TripAdvisor etc.)	26%	-1

RESERVATION METHOD

<u>Directly at the accommodation provider</u>	49%	+8
Own accommodation	21%	+9
At the activity provider	19%	+9
<u>Organiser</u>	14%	+9
Booking.com	48%	-4

TRAVELLING WITH

As a couple	50%	+3
<u>Alone</u>	12%	+7
Friends	16%	+1
Family	23%	-10

CHARACTERISTICS:

Size*	97,407
Share*	2%
Age	38
Women	41%

Spring	18%
Summer	55%
Shorter trips	4
Longer trips	2

AUSTRIA: Adventurists (1.8%)



DESTINATION TYPE

<u>In the mountains</u>	59%	+26
By a lake	45%	+7
<u>Elsewhere in nature</u>	37%	+9
<u>Countryside</u>	32%	+12
By the sea	48%	-32

TYPE OF
ACCOMMODATION

<u>Hostel</u>	28%	+12
<u>Tourist farm</u>	20%	+11
<u>Camp</u>	21%	+10
<u>Own property (holiday cottage)</u>	14%	+7
Private accommodation (e.g. Airbnb)	21%	-7

TRANSPORT TO THE
DESTINATION

Aeroplane	48%	+3
<u>Motorhome (camper)</u>	15%	+12
<u>Ship or another vessel</u>	4%	+4
Train	4%	+0
Car	29%	-16

TRANSPORT AT THE
DESTINATION

<u>Motorcycle</u>	23%	+18
Coach	28%	-3
<u>Bicycle</u>	15%	+7
Car	48%	-23
Train	13%	-3

ACTIVITIES

Water sports activities	49%	+31
<u>Adrenaline sports challenges</u>	41%	+35
<u>Mountaineering (more challenging tours)</u>	36%	+27
<u>History and castles</u>	46%	+14
<u>Recreation</u>	33%	+9

MOTIVATION

<u>Travel literature</u>	33%	+14
<u>Articles in print media</u>	26%	+12
Travel presentations	20%	+11
Past experience	46%	-5
Suitability of the destination in all seasons	14%	-2

SOURCE OF
INFORMATION

<u>Travel literature</u>	39%	+11
Blogs	23%	+10
Friends, family	44%	-10
Opinions in social media	23%	+6
Travel presentations	13%	+5

RESERVATION METHOD

<u>Expedia.com</u>	36%	+19
<u>Organiser</u>	20%	+14
Directly at the accommodation provider	41%	+0
Airbnb	17%	+4
Agoda.com	11%	+8

TRAVELLING WITH

As a couple	50%	+3
Friends	20%	+5
<u>Relatives</u>	3%	+3
Family	27%	-6

CHARACTERISTICS:

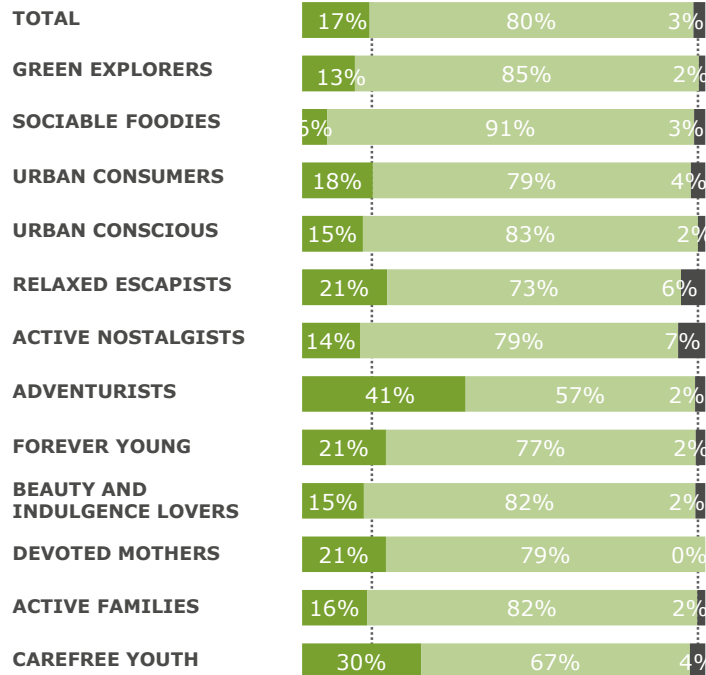
Size*	68,174
Share*	1%
Age	37
Women	32%

Spring	6%
Summer	75%
Shorter trips	3
Longer trips	1

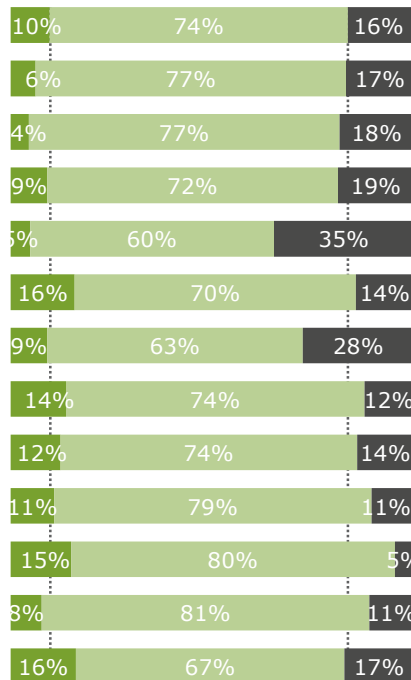
AUSTRIA: Price sensitivity



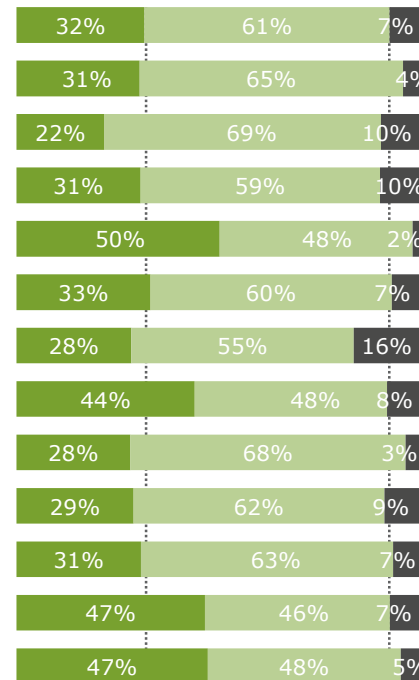
CHOICE OF ACCOMMODATION



CHOICE OF DESTINATION



CHOICE OF TRANSPORT

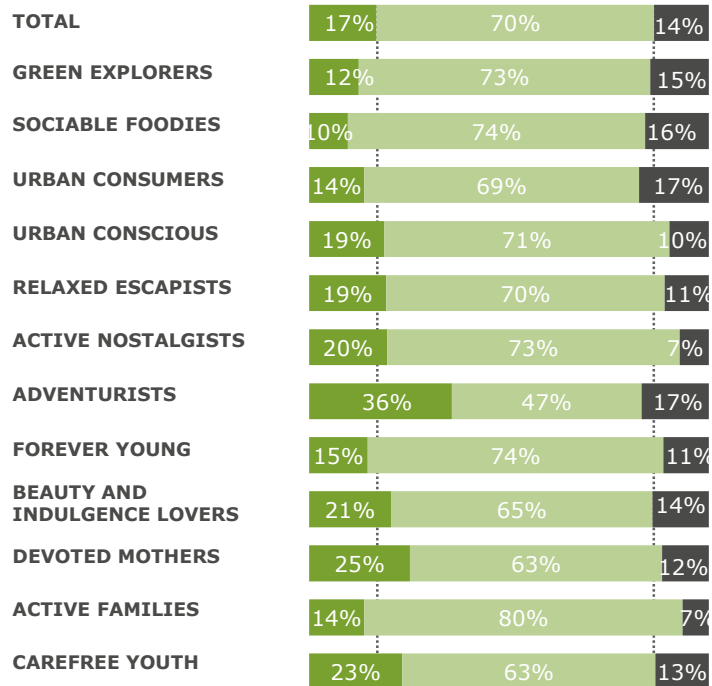


seek the most favourable offer
 assess value for money
 disregard the price

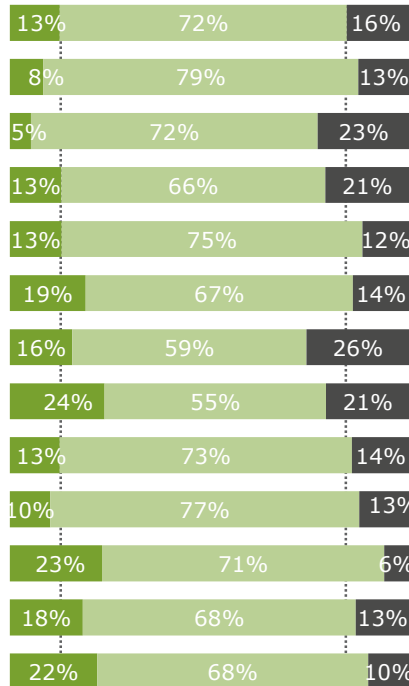
AUSTRIA: Price sensitivity



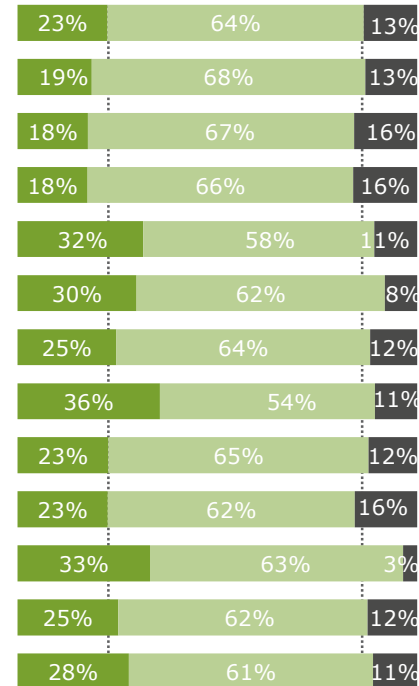
CHOICE OF ADDITIONAL ACTIVITIES



CHOICE OF FOOD



SHOPPING

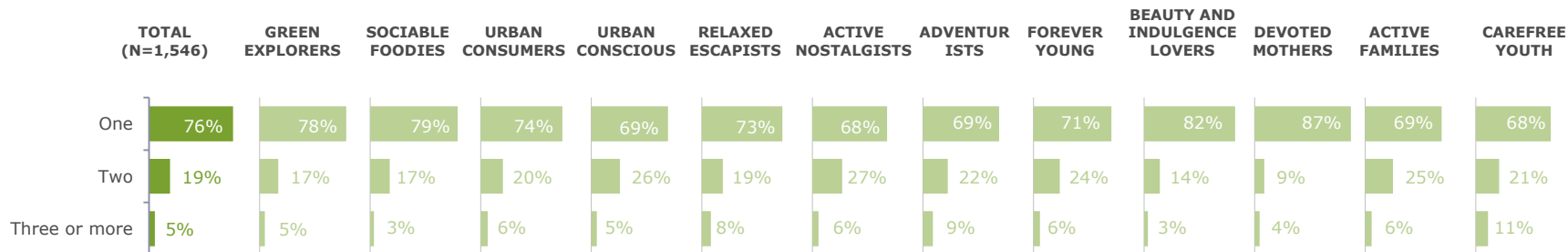


seek the most favourable offer
 assess value for money
 disregard the price

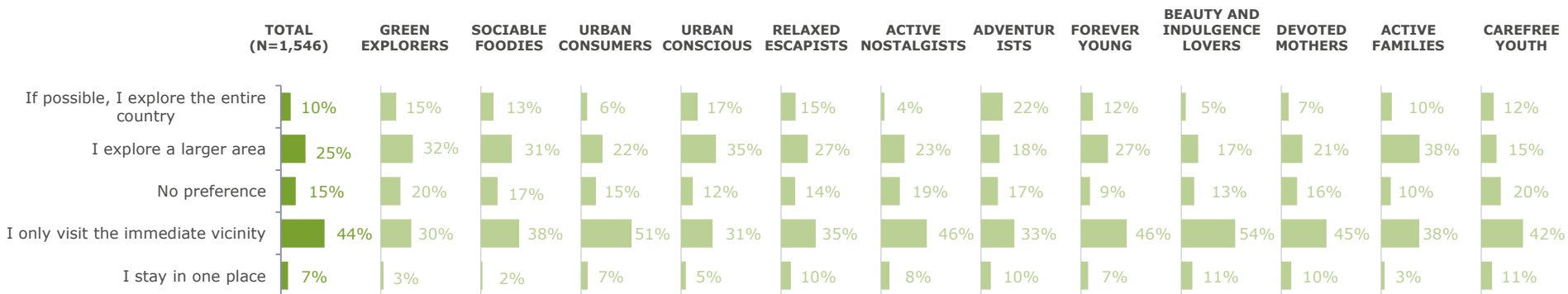
AUSTRIA: Level of exploration



Number of countries visited during one trip, break or holiday



Exploring in one country



GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY



AUSTRIA: General travel habits and motives



CHARACTERISTICS OF THE TARGET GROUP:

Size	3,691,730	Spring	15%
Share	66.2%	Summer	66%
Age	40	Shorter trips	3
Women	50%	Longer trips	1

TRAVELLING WITH:

As a couple	46%
Family	33%
Friends	15%
Alone	5%

DESTINATION TYPE:

By the sea	60%	20%	80%
Towns	12%	41%	53%
By a lake	3%	35%	37%

4 x

a year
travels
abroad

ACTIVITIES – TOP 10:

Sun and sea	71%
Sightseeing of old town centres	57%
Sightseeing of a town, the capital	55%
Natural parks, attractions	54%
Tourist sights	51%
Wellness and (beauty) spa	43%
Live like a local	40%
Shopping	40%
Gastronomic pleasures	35%
History and castles	33%

TRAVEL MOTIVES – TOP 10:

To learn something new	17%	40%
Relaxation	11%	35%
Enjoy good food, drinks	2%	31%
Spend time with partner	8%	30%
Rest, slow down the pace of life	10%	30%
Experience another culture	6%	26%
Retreat from the everyday	6%	25%
Spend time with family, strengthen the bonds	10%	25%
Visit a beautiful destination	7%	24%
Visit a town, the capital	5%	20%

VISITING COUNTRIES – TOP 10:

Italy	54%	60%
Germany	45%	56%
Croatia	41%	48%
Spain	36%	41%
Greece	32%	39%
Non-European countries	24%	35%
France	24%	32%
United Kingdom	22%	27%
Turkey	11%	26%
Hungary	17%	26%
Slovenia	12%	15%

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).

AUSTRIA: Elements of the purchase journey and consumption



TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Relatives, friends: 21%

Hostel: 16%

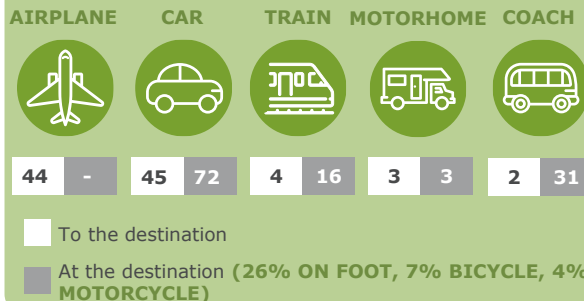
Boutique hotel: 12%

RESERVATION:

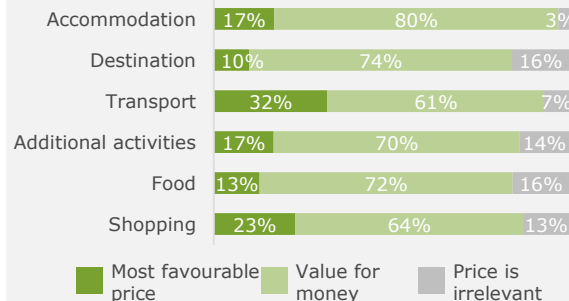


66%

TRANSPORT MODE (%):

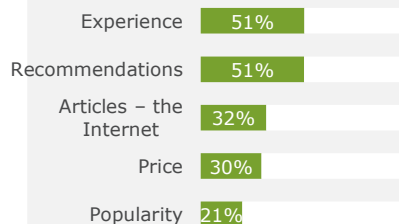


PRICE SENSITIVITY:

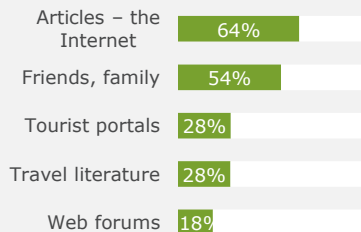


PURCHASE JOURNEY:

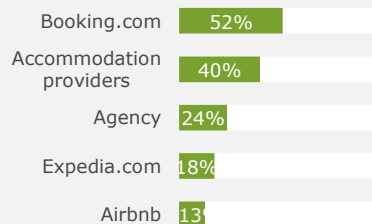
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	EUR 73	EUR 78
TRANSPORT per person	EUR 128	EUR 132

NOTES:

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

CHARACTERISTICS OF VISITORS TO
SLOVENIA:

Size	1,557,660	Spring	16%
Share	27.9%	Summer	65%
Age	41	Shorter trips	3
Women	48%	Longer trips	2

TRAVELLING WITH:

As a couple	50%
Family	30%
Friends	14%
Alone	6%

DESTINATION TYPE:

By the sea	60%	21%	82%
Towns	12%	44%	56%
By a lake	2%	39%	40%

5 x

a year
travels
abroad

ACTIVITIES – TOP 10:

Sun and sea	71%
Sightseeing of old town centres	62%
Natural parks, attractions	57%
Sightseeing of a town, the capital	56%
Tourist sights	54%
Live like a local	47%
Wellness and (beauty) spa	44%
Shopping	39%
Gastronomic delights	38%
Sports activities	37%

TRAVEL MOTIVES – TOP 10:

To learn something new	17%	43%
Spend time with partner	8%	31%
Enjoy good food, drinks	2%	31%
Relaxation	9%	31%
Experience another culture	7%	29%
Rest, slow down the pace of life	10%	25%
Visit a beautiful destination	7%	23%
Spend time with family, strengthen the bonds	10%	23%
Retreat from the everyday	5%	22%
Visit a town, the capital	5%	22%

VISITING COUNTRIES – TOP 10:

Italy	58%	65%
Croatia	54%	61%
Germany	47%	59%
Greece	36%	43%
Spain	35%	41%
Non-European countries	24%	35%
France	27%	35%
Slovenia	26%	33%
United Kingdom	25%	31%
Hungary	23%	31%
Slovenia	26%	33%

Repeated visit

Visit

NOTES:

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

AUSTRIA: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia

TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Relatives, friends: 22%

Hostel: 17%

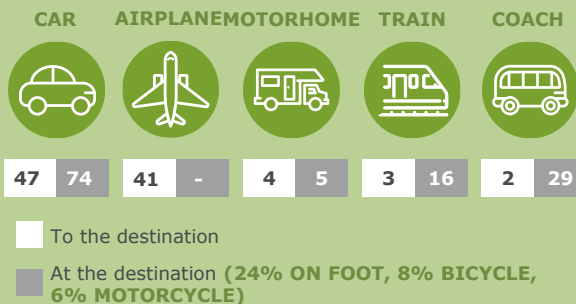
Camp: 14%

RESERVATION:

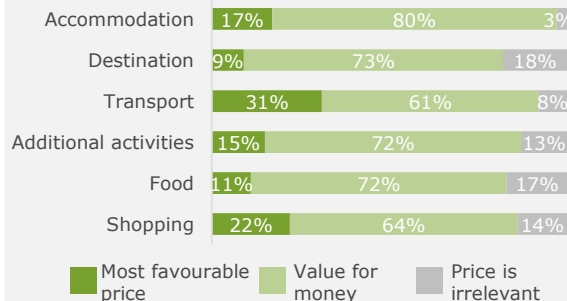


69%

TRANSPORT MODE (%):

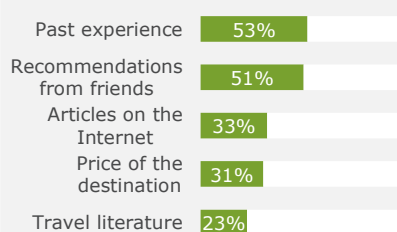


PRICE SENSITIVITY:

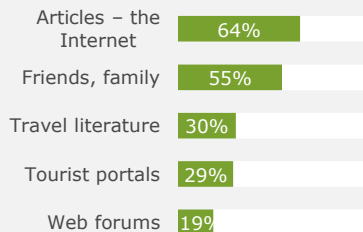


PURCHASE JOURNEY:

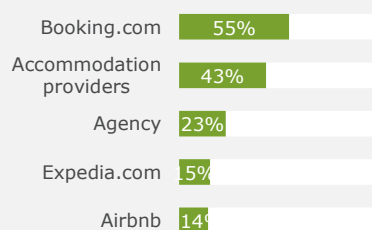
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	EUR 90	EUR 89
TRANSPORT per person	EUR 133	EUR 140

NOTES:

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



CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size	555,678	Spring	17%
Share	10.0%	Summer	65%
Age	41	Shorter trips	3
Women	47%	Longer trips	2

TRAVELLING WITH:

As a couple	53%
Family	24%
Friends	19%
Alone	5%

DESTINATION TYPE:

By the sea	54%	23%	77%
Towns	12%	52%	64%
By a lake	1%	44%	45%

5 x

a year
travels
abroad

ACTIVITIES – TOP 10:

Sun and sea	72%
Sightseeing of old town centres	67%
Sightseeing of a town, the capital	65%
Tourist sights	63%
Natural parks, attractions	62%
Live like a local	51%
Gastronomic delights	46%
Wellness and (beauty) spa	44%
Sports activities	44%
Shopping	41%

TRAVEL MOTIVES – TOP 10:

To learn something new	24%	49%
Spend time with partner	11%	36%
Enjoy good food, drinks	2%	35%
Experience another culture	6%	34%
Rest, slow down the pace of life	11%	25%
Visit a town, the capital	6%	25%
Visit a beautiful destination	7%	24%
Relaxation	4%	23%
Spend time with family, strengthen the bonds	8%	21%
Retreat from the everyday life	5%	21%

VISITING COUNTRIES – TOP 10:

Slovenia	77%	100%
Italy	75%	86%
Croatia	74%	83%
Germany	64%	79%
Greece	49%	56%
France	43%	55%
Spain	47%	52%
Hungary	37%	50%
United Kingdom	37%	46%
Non-European countries	27%	43%

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).

AUSTRIA: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia

TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Relatives, friends: 26%

Hostel: 21%

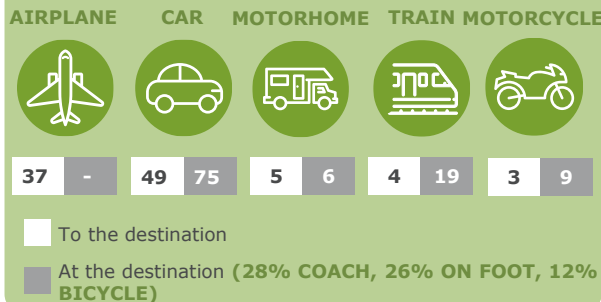
Boutique hotel: 18%

RESERVATION:

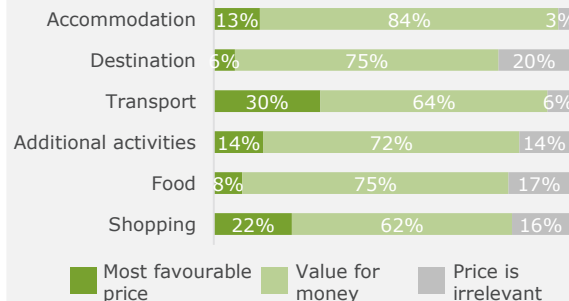


66%

TRANSPORT MODE (%):

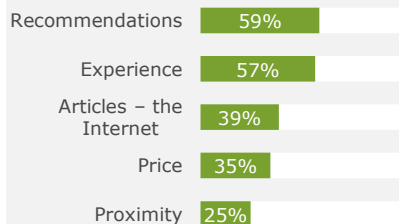


PRICE SENSITIVITY:

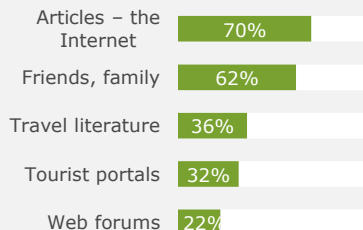


PURCHASE JOURNEY:

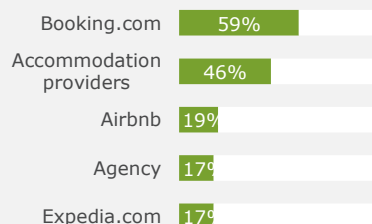
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	€78	€81
	in SLO	€67	€69
TRANSPORT per person	in Europe	€114	€124
	in SLO	€56	€55

NOTES:

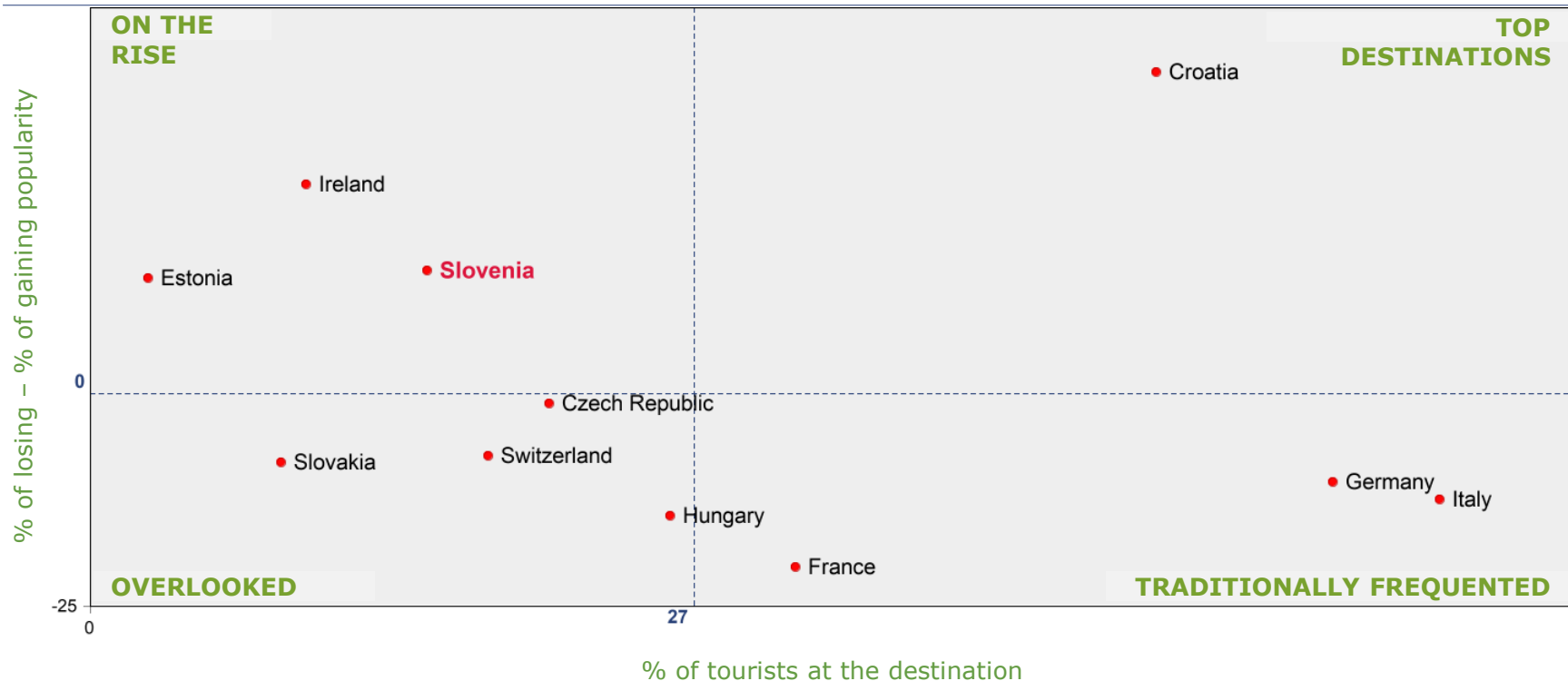
The results represent the subsample in the target group: they travel abroad at least once a year for a break or holiday, their destinations also include Slovenia. / TYPE OF ACCOMMODATION: where they usually spend the night. / RESERVATION: how far in advance they book. / TRANSPORT MODE: how they travel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



AUSTRIA: Destination relevance

Share of visitors by popularity of the destination



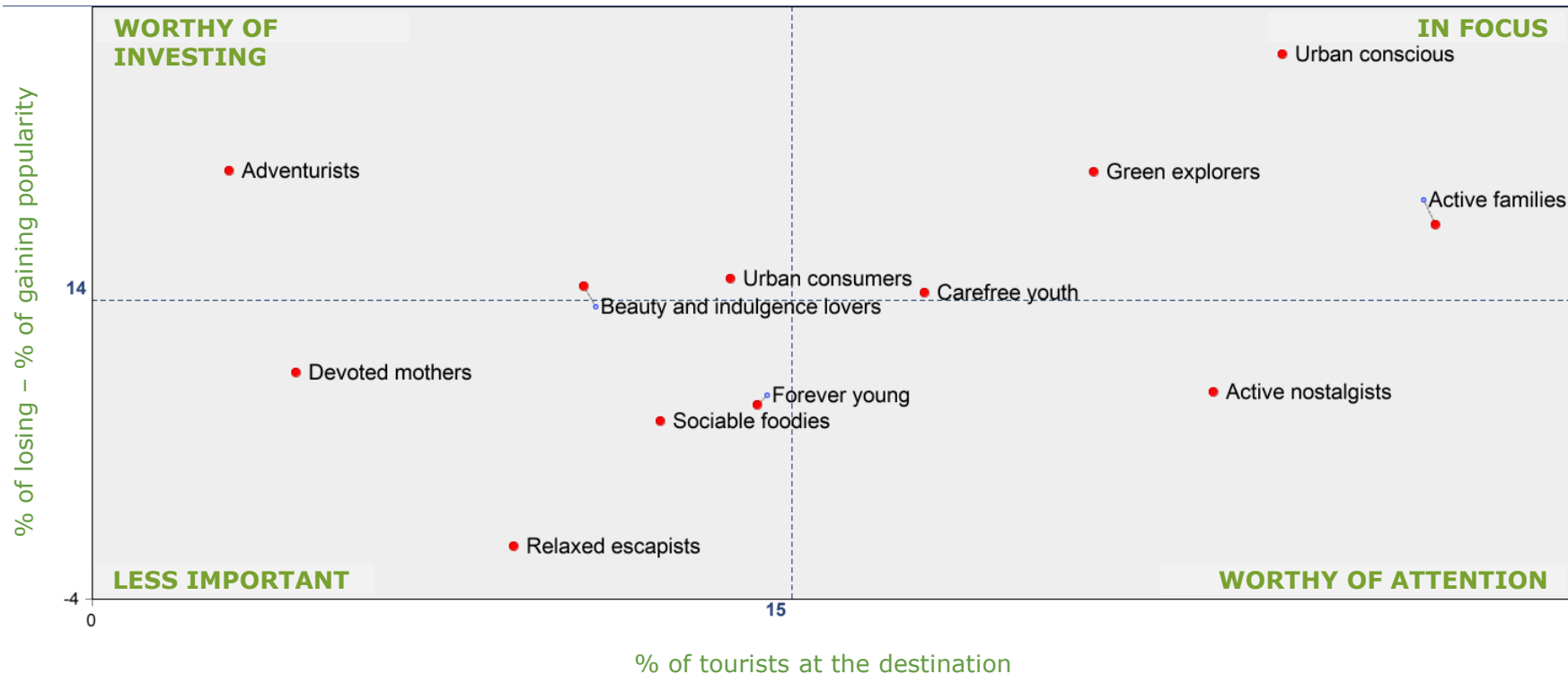
NOTES:

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).

AUSTRIA: Slovenia's relevance

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

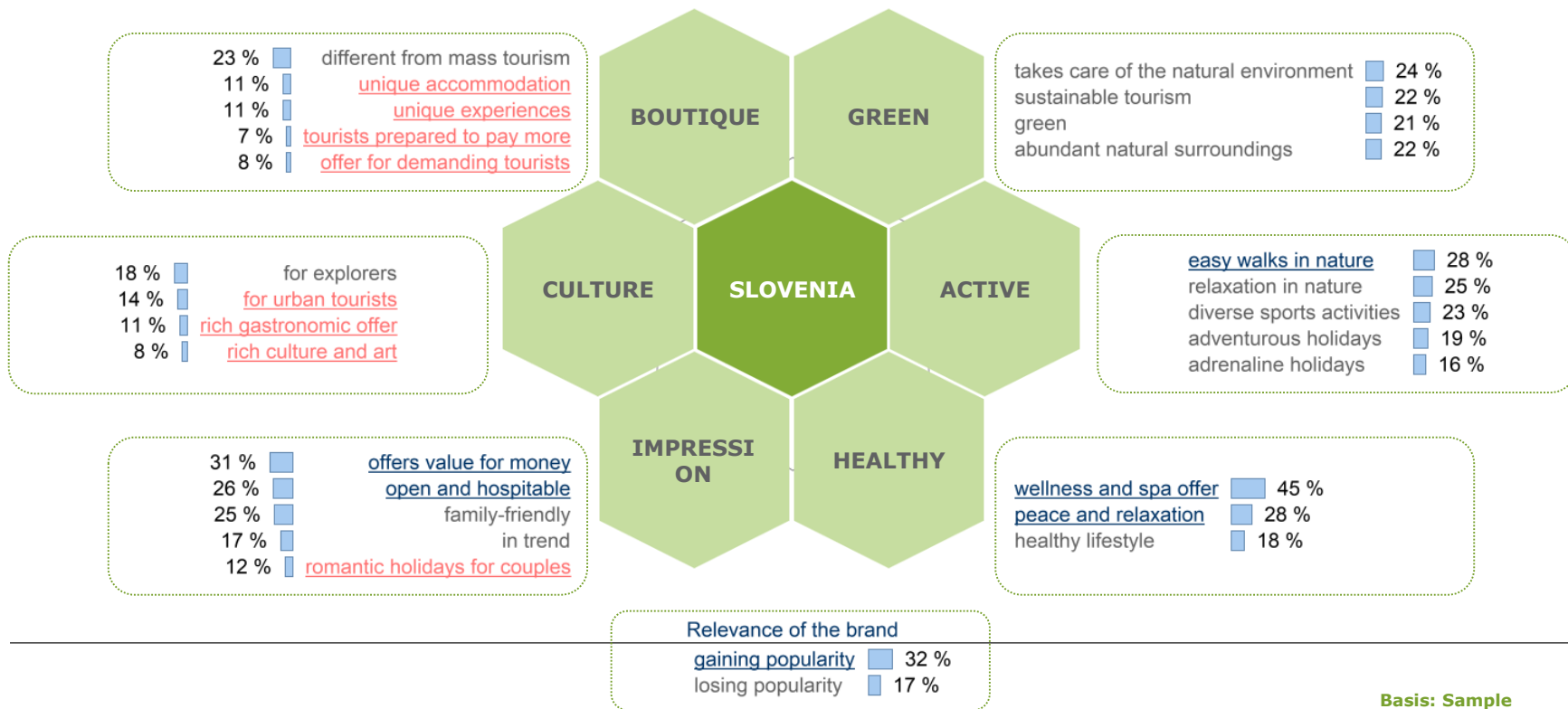


NOTES:

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).

AUSTRIA: Slovenia's image



Basis: Sample

NOTES:

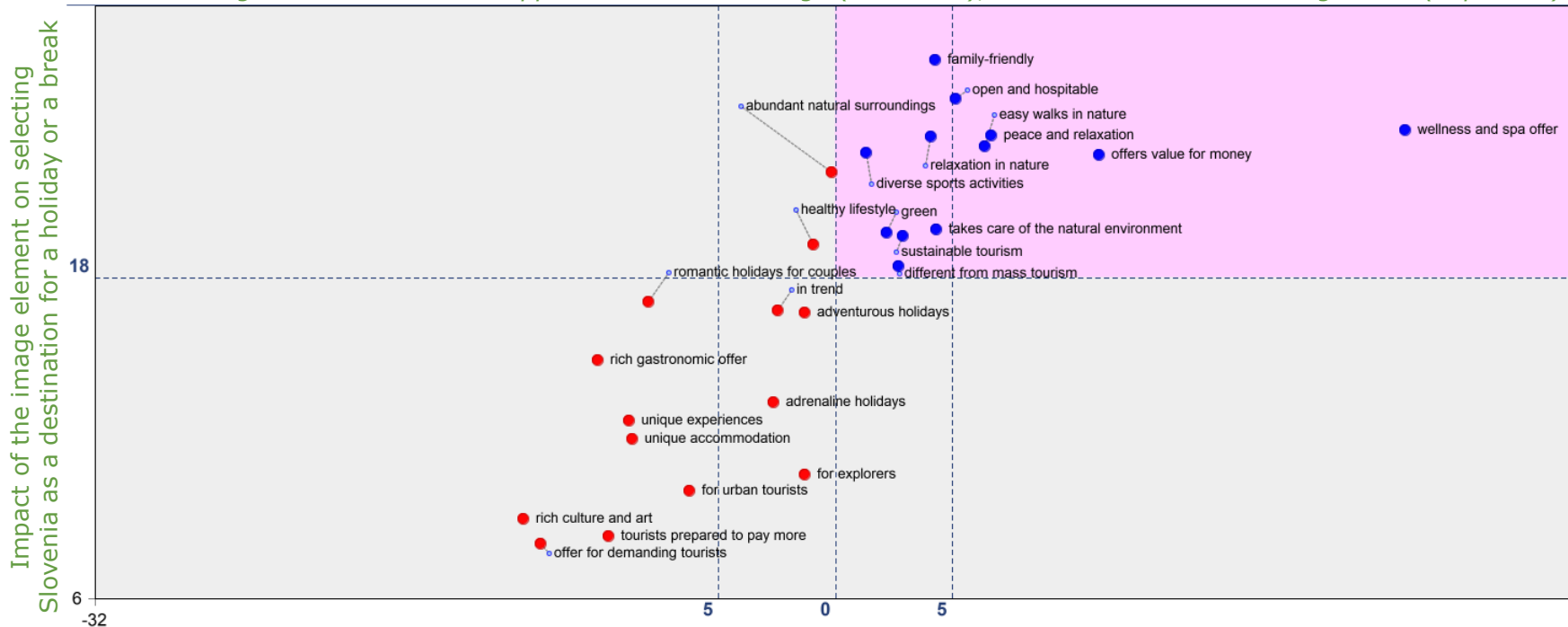
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

AUSTRIA: 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)*

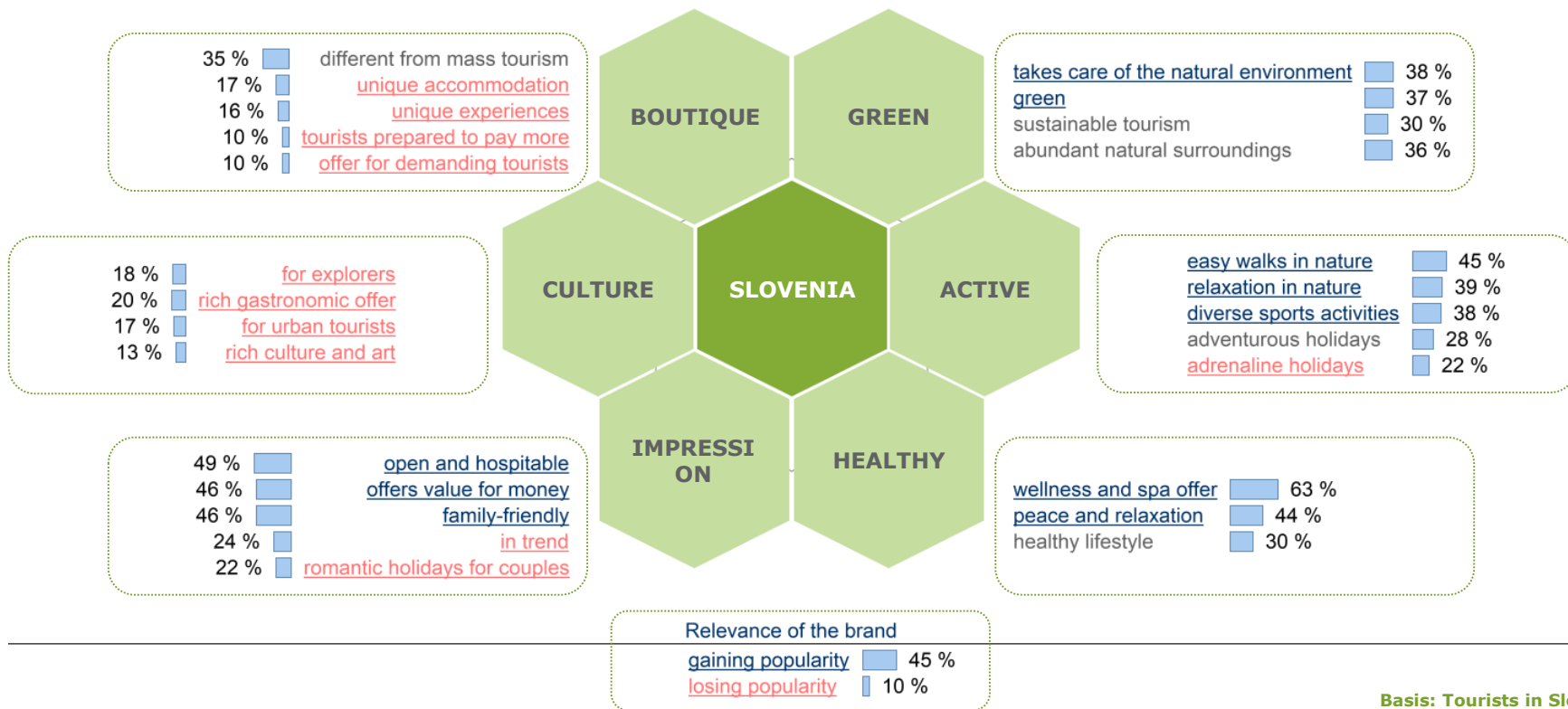


NOTES:

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.

AUSTRIA: Slovenia's image

Subsample: tourists in Slovenia



Basis: Tourists in Slovenia

NOTES:

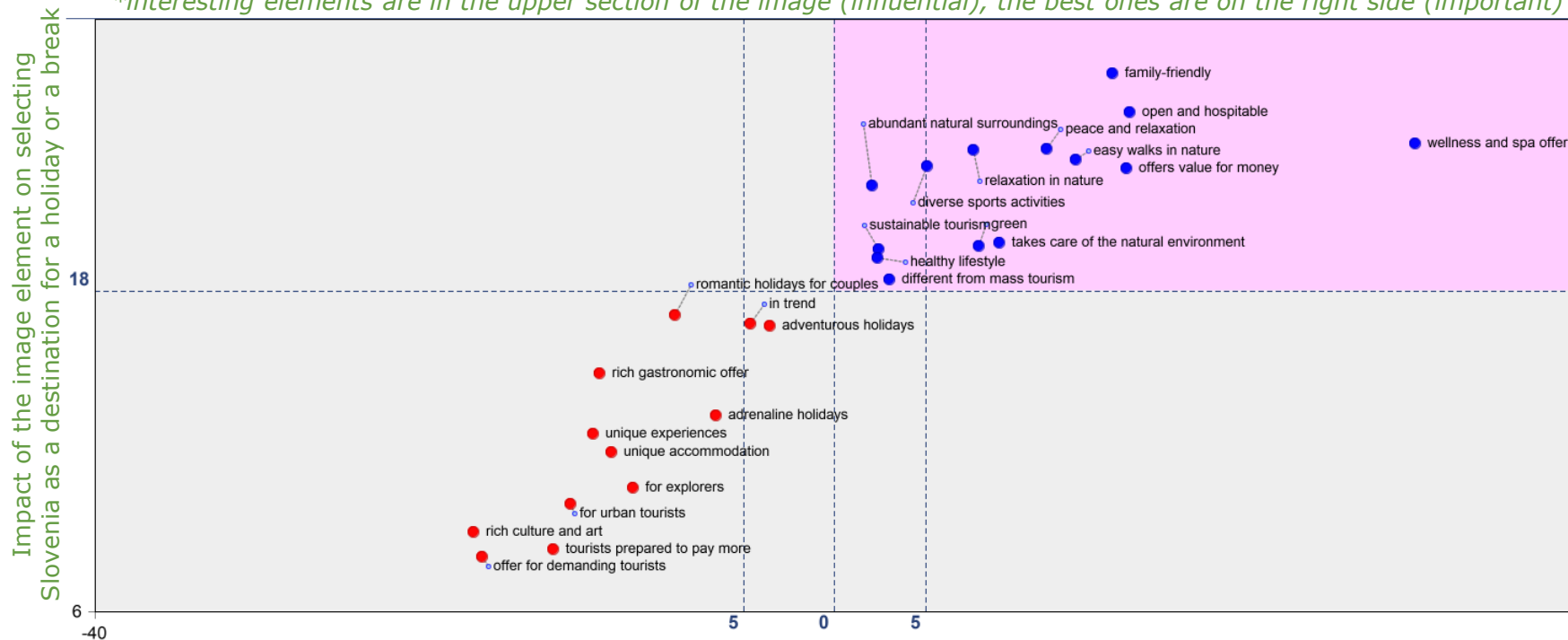
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

AUSTRIA: 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)

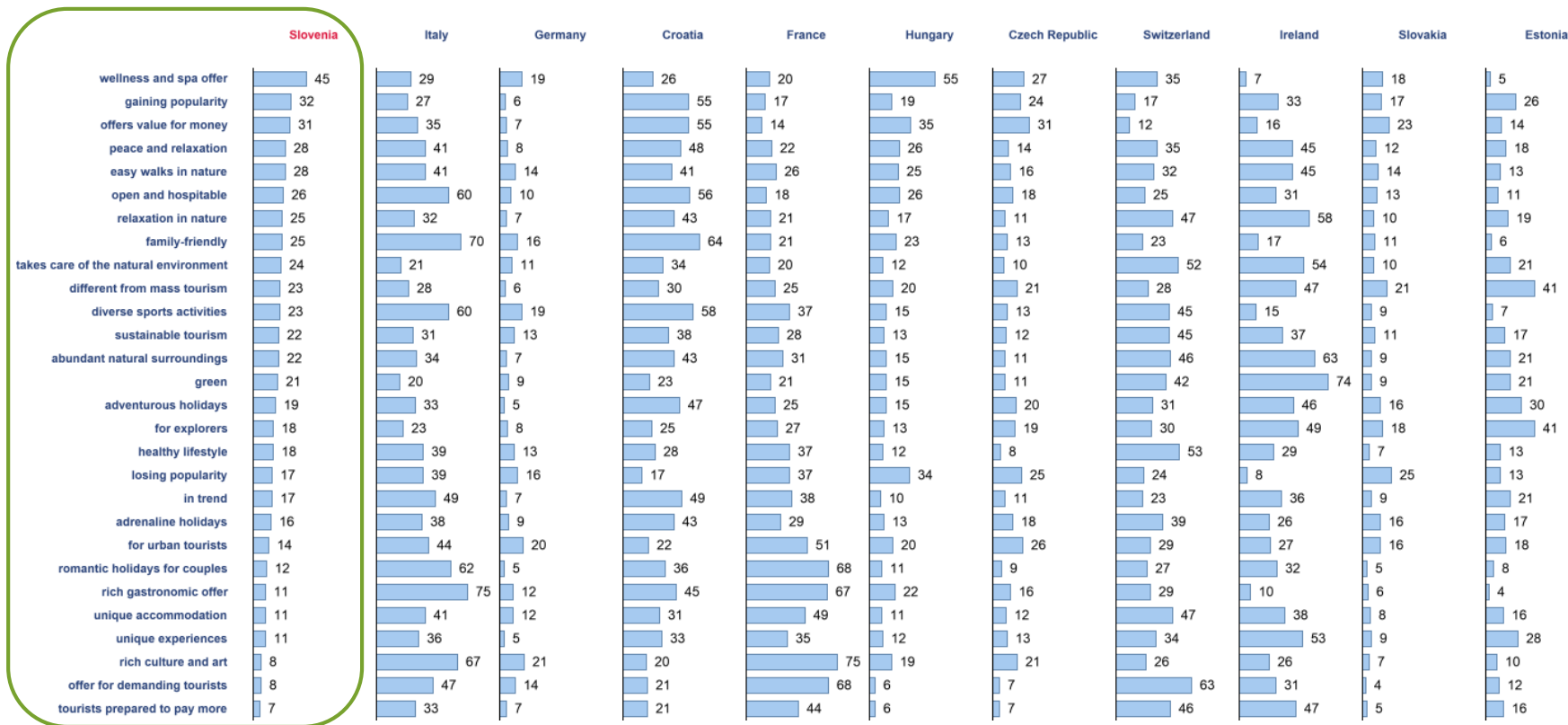


Weaker association of Slovenia ← → Stronger association of Slovenia

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.

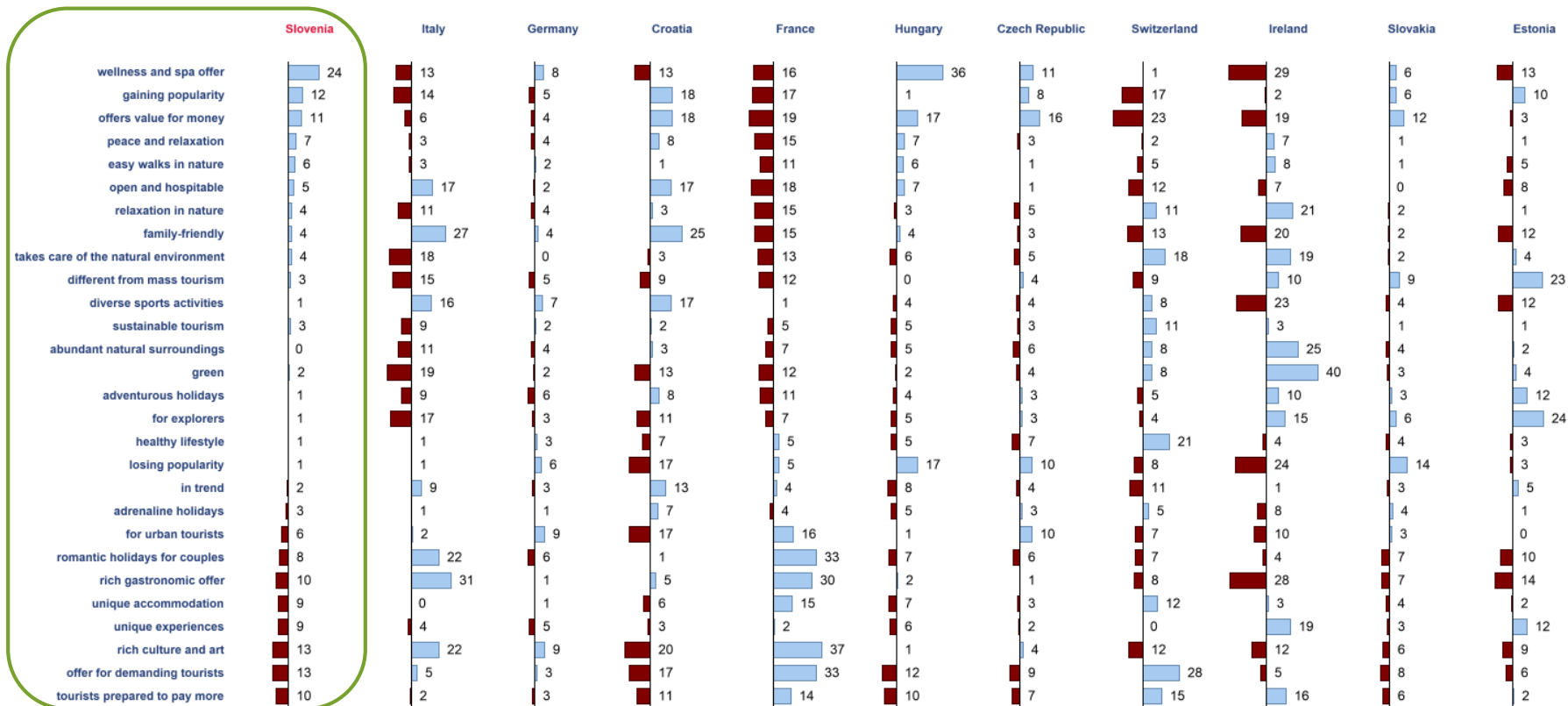
AUSTRIA: Destination image



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.

AUSTRIA: 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.

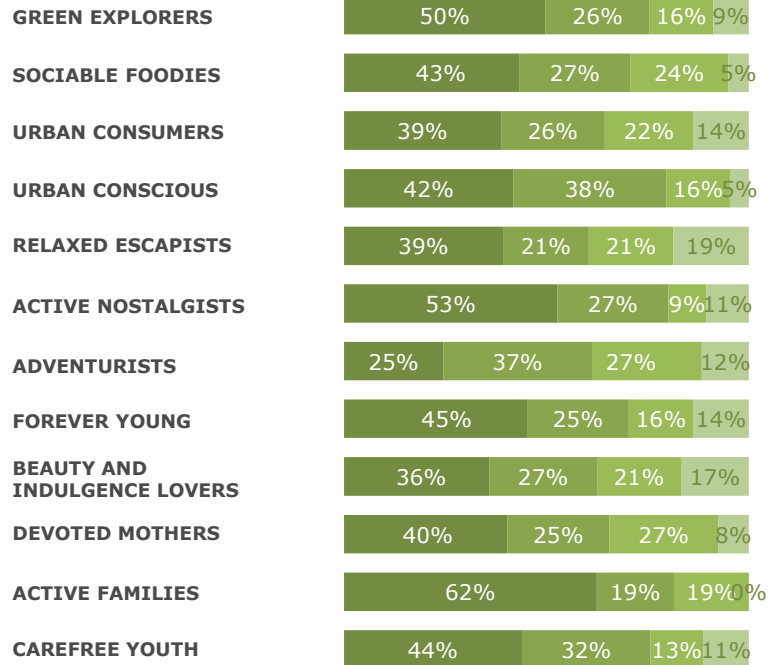
SLOVENIA: KNOWLEDGE, EXPERIENCE AND RECOMMENDATIONS



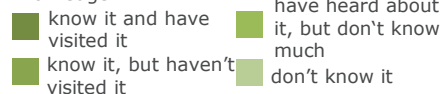
AUSTRIA: Knowledge of, and experience with, Slovenia

KNOWLEDGE OF SLOVENIA

Basis: sample

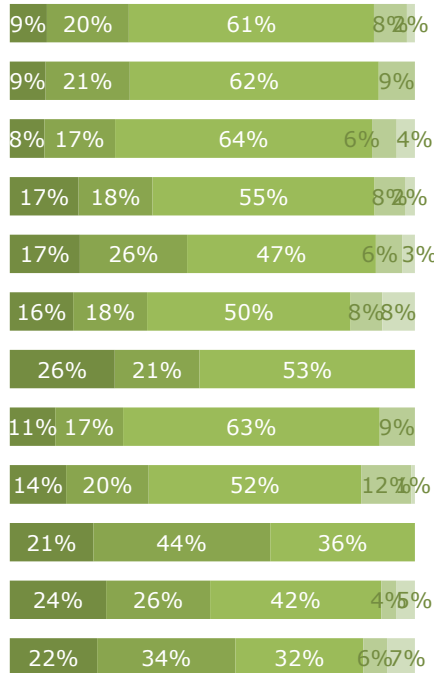


Knowledge:



SATISFACTION

Basis: visitors to Slovenia

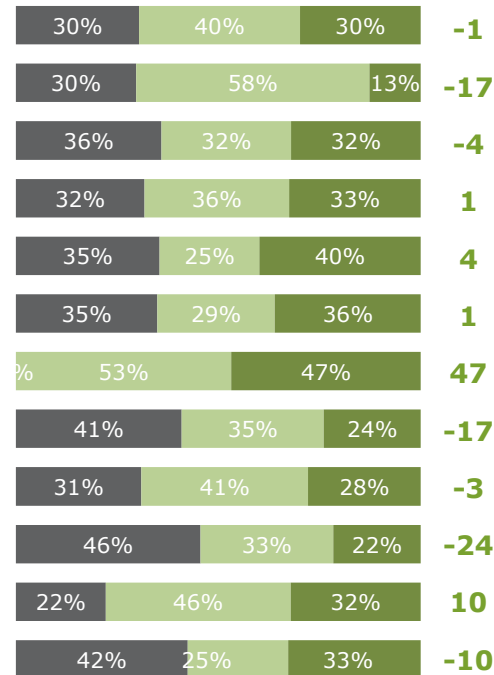


Meeting of expectations:



NPS - DEGREE OF RECOMMENDATION

NPS Index



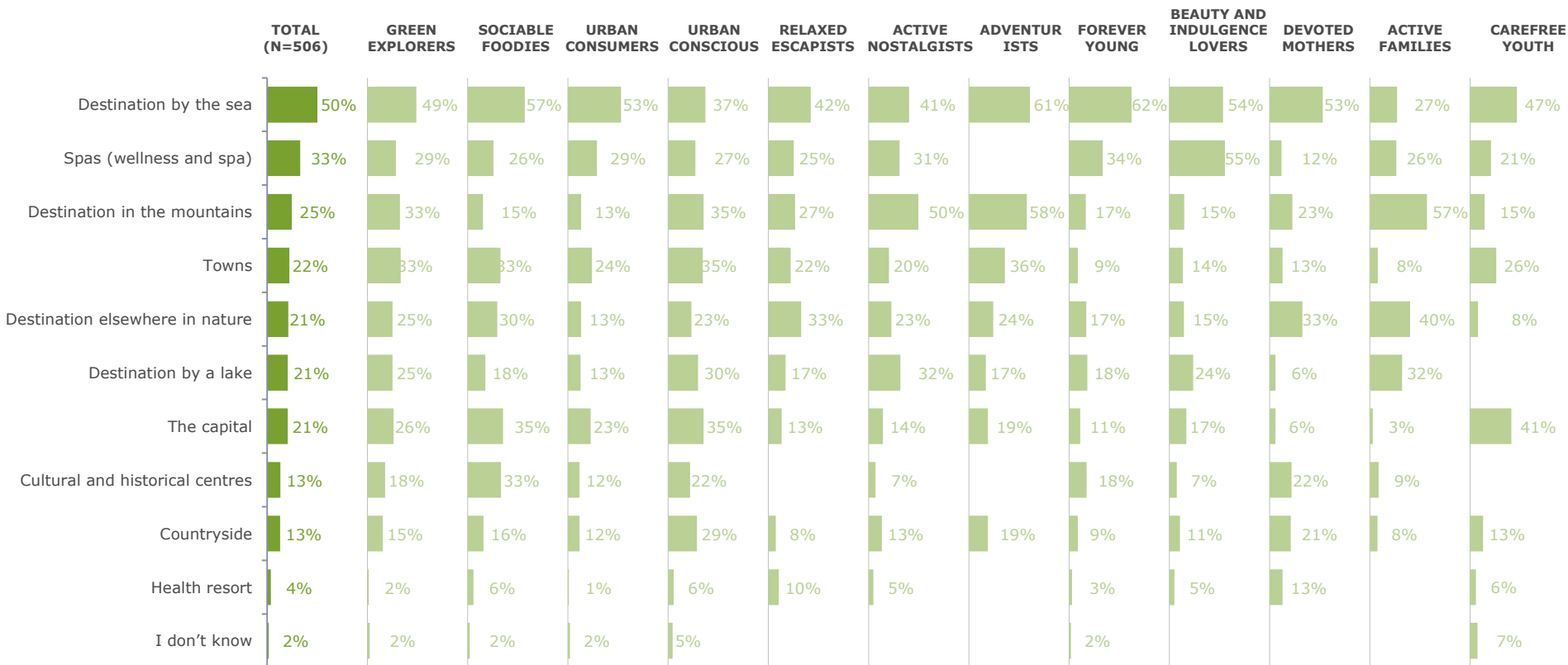
Recommendations:



NOTE: The gossipers represent values from 0 to 6, neutral from 7 to 8, and promoters from 9 to 10 (recommend the country). The NPS Index is the share of promoters minus the share of gossipers, and reveals the level of loyalty.

AUSTRIA: Destination type in Slovenia

Subsample: visitors to Slovenia



NOTES:

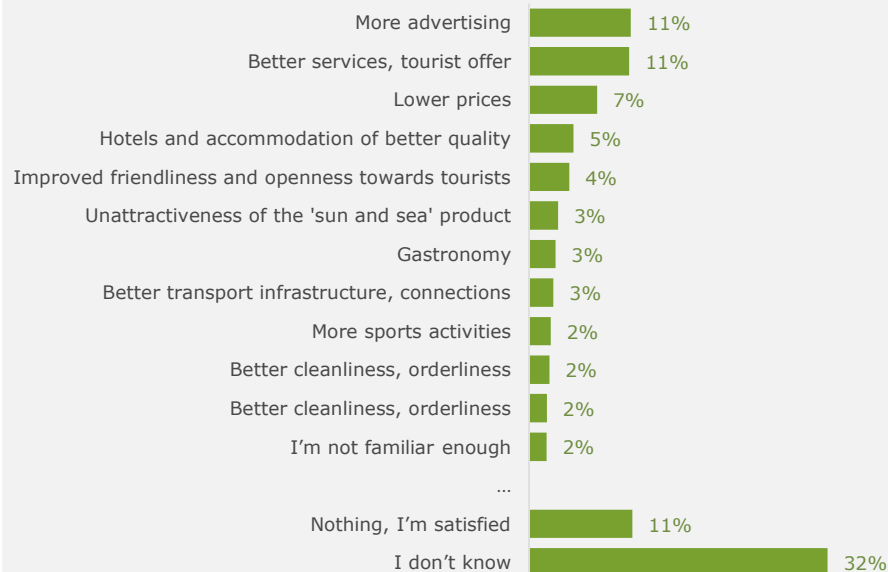
Replies are presented on a subsample of visitors to Slovenia who would visit it again. The chart includes types of tourist destinations which visitors to Slovenia would choose if they visit it again. Several replies were possible.

AUSTRIA: Opportunities for improvement and elements of excitement

Subsample: visitors to Slovenia

Opportunities for improvement – Top 12

Gossipers and neutral (would not recommend Slovenia), n=461

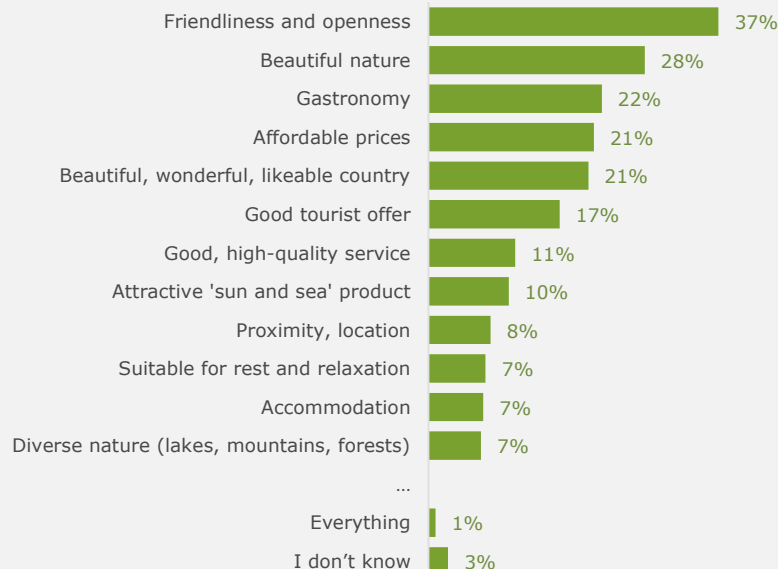


NOTES:

OTHER STATEMENTS: modernisation, lower prices/abolishment of vignettes, nature, landscape, knowledge of foreign languages, offer of local goods and own culture, more events, entertainment, more hotel facilities, accommodation, ensure more pleasant staying, attractiveness, different social and political attitude

Elements of excitement – Top 12

Promoters (would recommend Slovenia), n=192

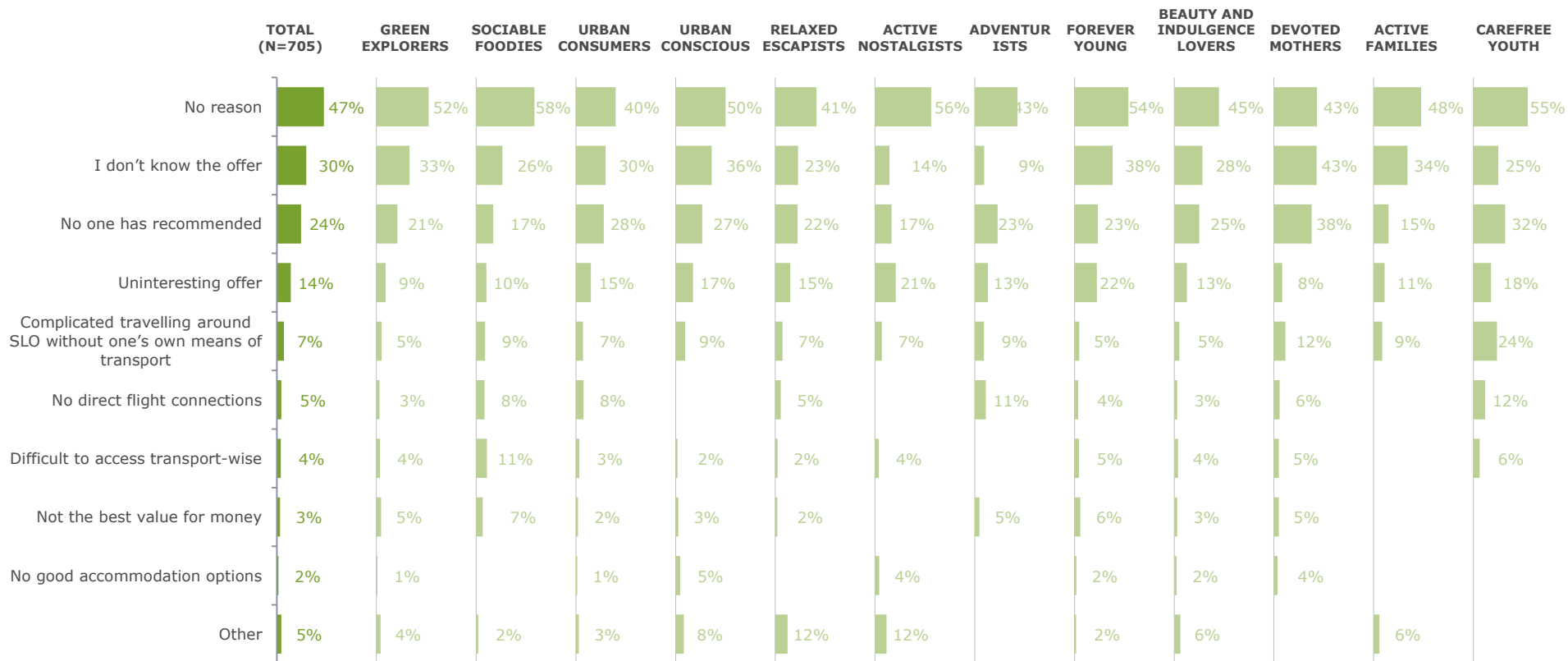


NOTES:

OTHER STATEMENTS: sights, attractions, rich culture, history, cleanliness and orderliness, not crowded, no mass tourism, easy communication, pleasant and fun atmosphere

AUSTRIA: Reasons for not visiting

Subsample: non-visitors



NOTES:

Replies are presented on the subsample of those who replied in the survey that they knew Slovenia or had at least heard of it but had not visited it yet (subsample: non-visitors). The replies provide reasons why they have not visited Slovenia. Several replies were possible.

ATTACHMENTS





Additional explanations

The sizes of target groups and segments (absolute values) were calculated on the basis of **data on population** in countries on 1 January 2016*:

Country	Total population*	Population aged between 18 and 65*
Austria	8,690,100	5,574,356
France	66,760,000	39,372,128
Italy	60,665,600	37,287,764
Germany	82,175,700	51,549,829
Netherlands	16,979,100	10,477,231
Poland	37,967,200	25,060,599
Russia	143,973,300	97,436,838
Great Britain	65,382,600	39,850,721

When calculating expenditure of tourists, the **currency conversion** on 30 November 2017 was used**:

- **UK:** GBP 1 = EUR 1,13041
- **Poland:** PLN 1 = EUR 0,23793
- **Russia:** RUB 1 = EUR 0,01442

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

**Source: <https://www.oanda.com/currency/converter/>

Key for icons

TYPE OF ACCOMMODATION



Apartment



Hostel



Hotel



**Boutique
hotel**



**Private
accommodation**



Camp



**Relatives or
friends**

TRANSPORT MODE



Aeroplane



Car



Bicycle



Walking



**Public
transport
(bus)**



**Public
transport
(train)**



Motorhome



Motorcycle

AUSTRIA: Green explorers (15.7%)



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	63%	+29
Flatland	37%	-29

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

TYPE OF
ACCOMMODATION

Apartment	69%	+17
Hotel	31%	-17

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	48%	+2
Train	52%	-2

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

TRANSPORT AT THE
DESTINATION

Coach	38%	+7
Train	62%	-7

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

ACTIVITIES

Sightseeing of old town centres	80%	+22
Natural sightseeing	76%	+22
Nature	28%	+8

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

MOTIVATION

Recommendations from friends	60%	+8
TV programme	28%	+8
Travel literature	28%	+8

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

SOURCE OF INFORMATION

Articles on the Internet	74%	+10
Travel literature	35%	+7
Friends	61%	+7

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

RESERVATION METHOD

Booking.com	59%	+7
Directly at the accommodation provider	51%	+10

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

TRAVELLING WITH

As a couple	51%	+4
Alone	7%	+2
Family	24%	-8
Friends	17%	+1

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

CHARACTERISTICS:

Size*	900,693
Share*	10%
Age	40
Women	53%

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

AUSTRIA: Elements of the purchase journey and consumption



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

TYPE OF ACCOMMODATION:

Top 3 most frequent accommodation types are shown in icons. Less frequent accommodation types are given in the text.

Question: What type of accommodation do you usually seek for your break, holiday or trip? Classify according to your most towards your least frequent accommodation type. (several replies)

RESERVATION:

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

TRANSPORT MODE (%):

AIRPLANE



44

TRAIN MOTORHOME COACH



2

31

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?

To the destination

At the destination (26% ON FOOT, 7% BICYCLE, 4% MOTORCYCLE)

PRICE SENSITIVITY:

Accommodation 80% 3%

Additional

Food 13% 72% 16%

Shopping 23% 64% 13%

Most favourable price Value for money Price is irrelevant

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

PURCHASE JOURNEY:

MOTIVATION

SOURCES OF

RESERVATION METHOD:

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

Articles – the Internet 32%

Price 30%

Popularity 21%

Tourist portals 28%

Travel literature 28%

Web forums 18%

Agency 24%

Expedia.com 18%

Airbnb 13%

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.

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).

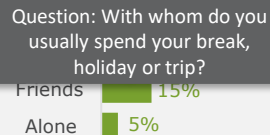
AUSTRIA: General travel habits and motives



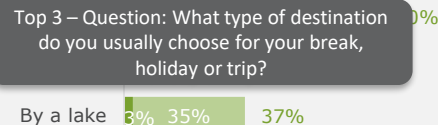
CHARACTERISTICS OF THE TARGET GROUP:



TRAVELLING WITH:



DESTINATION TYPE:



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)



TRAVEL MOTIVES:

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 – 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)



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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