



# IDENTIFICATION OF MARKET POTENTIAL

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

FRANCE

December 2017



## Contracting Authority

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**Name:** Slovenian Tourist Board

**Address:** Dimičeva ulica 13, SI - 1000  
Ljubljana

**Contact:** Barbara Zmrzlikar

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## Contractor

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**Name:** Valicon d.o.o.

**Address:** Kopitarjeva 2, 1000 Ljubljana

**Contact:** Zenel Batagelj

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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.



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



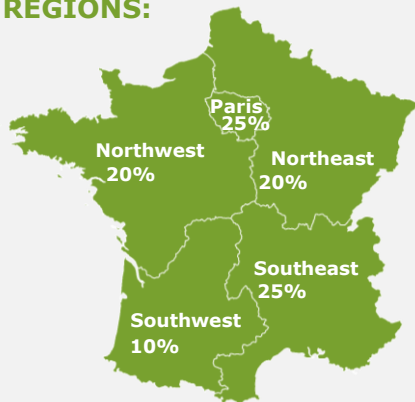
<b>Method of implementation</b>	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
<b>Country of implementation</b>	France
<b>Implementation period</b>	1 December – 5 December 2017
<b>Target group</b>	Citizens of a certain 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>
<b>Sample</b>	Entire sample: n=2,670 Target group: n=1,533 Visitors to Slovenia: n=229 Tourists in Slovenia: n=38
<b>Representativeness</b>	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.
<b>Survey length</b>	Average duration of the survey: t=17:48.



# FRANCE: Sample demographics



## REGIONS:

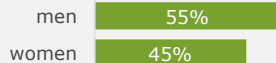


### DETAILED DEFINITION OF REGIONS:

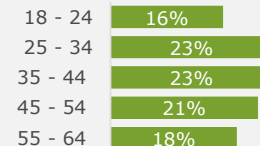
**Northwest:** Upper and Lower Normandy, Brittany, Centre, Pays de la Loire, Poitou-Charentes.

**Northeast:** Alsace, Burgundy, Champagne-Ardenne, Franche-Comté, Lorraine, Nord-Pas-de-Calais, Picardie. **Southwest:** Aquitaine, Limousin, Midi-Pyrénées. **Southeast:** Auvergne, Corse, Languedoc-Roussillon, Provence, Alps, Côte d'Azur, Rhône-Alpes. **Paris.**

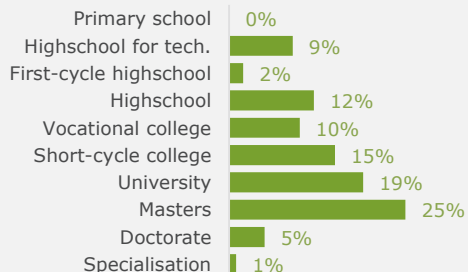
## GENDER:



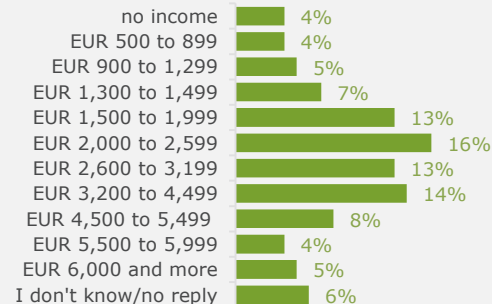
## AGE:



## EDUCATION:

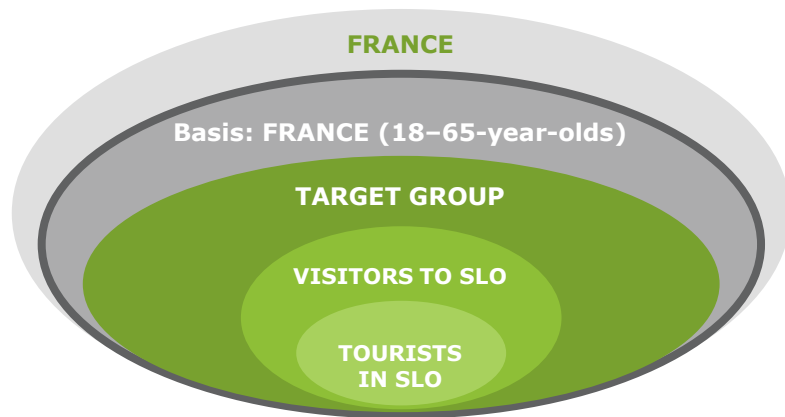


## PERSONAL INCOME:





# Sample shares and sizes



*Bordered ellipses show the basis for share calculations.*



Basis: FRANCE 18–65 year olds	
POPULATION (18–65 YEARS)	100.0%
TARGET GROUP	58.1%
VISITORS TO SLOVENIA	8.6%
TOURISTS IN SLOVENIA	1.4%

Basis: TARGET GROUP	
POPULATION (18–65 YEARS)	/
TARGET GROUP	100.0%
VISITORS TO SLOVENIA	16.0%
TOURISTS IN SLOVENIA	2.5%

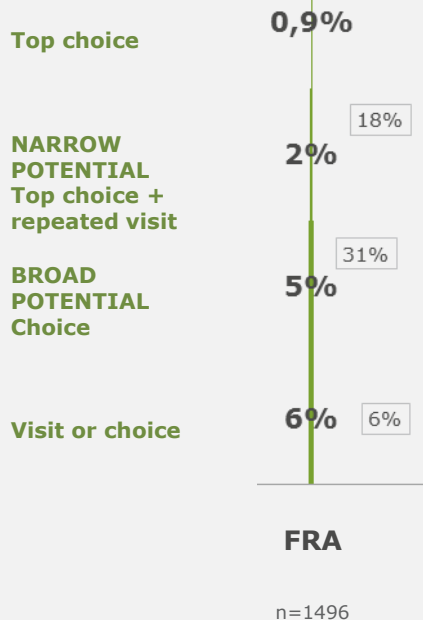
Absolute size*	
	39,372,128
	22,866,512
	3,375,079
	557,482

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

# **MARKET STRUCTURE AND SIZE (PERSONAS)**



# FRANCE: Size of the potential



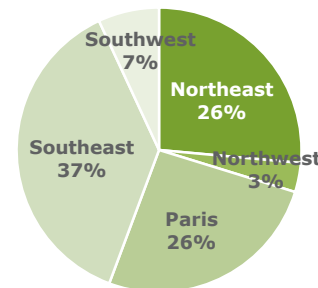
## NARROW POTENTIAL:

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*
<b>Total in TG:</b>	<b>431,120</b>
Northeast	114,068
Northwest	14,280
Paris	111,735
Southeast	161,153
Southwest	29,884

## REGIONAL CLASSIFICATION:



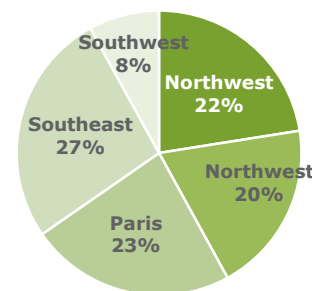
## BROAD POTENTIAL:

5%

Tourists who would visit Slovenia in the future (broad interest) OR those who have already been to Slovenia and would visit it again

	Size*
<b>Total in TG:</b>	<b>1,134,692</b>
Northeast	255,292
Northwest	221,367
Paris	264,746
Southeast	302,314
Southwest	90,973

## 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.

## FRANCE: Size of segments by regions



## URBAN CONSUMERS:

20.3%

4,634,723



## GREEN EXPLORERS:

17.4%

3,968,518



## SOCIALE FOODIES:

9.5%

2,170,666

	Total	Northeast	Northwest	Paris	Southeast	Southwest	
	%	100.0%	19.7%	19.8%	24.6%	25.2%	10.7%
	Size	22,866,512	4,514,894	4,520,556	5,630,992	5,761,205	2,438,866
GREEN EXPLORERS	%	17.4%	18.3%	20.0%	21.9%	30.8%	9.1%
	Size	3,968,518	725,100	794,212	867,678	1,221,457	360,070
SOCIALE FOODIES	%	9.5%	18.8%	18.0%	28.0%	22.3%	12.9%
	Size	2,170,666	407,989	391,180	607,261	483,873	280,362
URBAN CONSUMERS	%	20.3%	19.0%	19.0%	24.8%	24.2%	13.0%
	Size	4,634,723	879,231	881,962	1,149,513	1,120,578	603,438
URBAN CONSCIOUS	%	6.8%	14.7%	21.5%	23.8%	23.7%	16.3%
	Size	1,561,237	228,954	335,147	372,312	370,481	254,343
RELAXED ESCAPISTS	%	9.4%	17.7%	16.7%	32.4%	22.3%	10.9%
	Size	2,140,323	379,589	357,603	694,267	476,522	232,342
ACTIVE NOSTALGISTS	%	7.1%	22.2%	21.1%	27.9%	25.3%	3.5%
	Size	1,623,402	360,522	341,870	453,683	411,224	56,103
ADVENTURISTS	%	3.6%	21.6%	17.8%	29.6%	26.9%	4.1%
	Size	831,174	179,497	148,118	246,091	223,718	33,750
FOREVER YOUNG	%	8.5%	27.2%	27.5%	12.9%	20.9%	11.5%
	Size	1,953,148	530,351	537,887	252,216	409,041	223,653
BEAUTY AND INDULGENCE LOVERS	%	9.5%	23.2%	18.6%	22.1%	26.0%	10.2%
	Size	2,179,890	504,704	404,802	482,337	566,190	221,857
DEVOTED MOTHERS	%	1.9%	35.2%	9.2%	20.6%	22.7%	12.4%
	Size	432,613	152,141	39,626	88,950	98,415	53,480
ACTIVE FAMILIES	%	1.9%	8.2%	30.7%	35.7%	18.8%	6.6%
	Size	437,004	35,752	134,331	155,844	82,324	28,753
CAREFREE YOUTH	%	4.1%	13.5%	15.6%	30.1%	31.0%	9.8%
	Size	933,816	125,810	145,814	281,263	289,719	91,210

## 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	61%
Cities	52%
Cultural and historical centres	42%
Capitals	42%
Elsewhere in nature	33%

TYPE OF  
ACCOMMODATION

Hotel	79%
Apartment	42%
Private accommodation (e.g. Airbnb)	31%
Staying with relatives or friends	27%
Hostel	26%

TRANSPORT TO THE  
DESTINATION

Aeroplane	70%
Car	22%
Train	3%
Motorhome (camper)	2%
Motorcycle	1%

TRANSPORT AT THE  
DESTINATION

Car	71%
Coach	33%
On foot	28%
Train	19%
Bicycle	6%

## ACTIVITIES

Sightseeing of a town, the capital	64%
Sightseeing of old town centres	56%
Recreation	53%
Natural sights, nature	50%
Sun and sea	49%

## MOTIVATION

Recommendations from friends	43%
Price of the destination	39%
Past experience	38%
Articles on the Internet	31%
Travel presentations	30%

SOURCE OF  
INFORMATION

Friends, family	52%
Articles on the Internet	40%
Travel literature	35%
Travel presentations	24%
Web portals (TripAdvisor etc.)	24%

## RESERVATION METHOD

Booking.com	52%
Airbnb	31%
Agency	22%
Expedia.com	22%
Directly at the accommodation provider	15%

## TRAVELLING WITH

As a couple	54%
Family	25%
Friends	11%
Alone	8%
Relatives	2%

## CHARACTERISTICS:

Size*	22,866,512
Share*	58%
Age	40
Women	45%

Spring	41%
Summer	46%
Shorter trips	2
Longer trips	2

## 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.

## FRANCE: Tourists in Slovenia (2.5%)



## DESTINATION TYPE

By the sea	66%	+5
Cities	57%	+5
By a lake	33%	+11
Cultural and historical centres	41%	-1
In the mountains	33%	+2

TYPE OF  
ACCOMMODATION

Hotel	82%	+3
Hostel	27%	+2
Tourist farm	15%	+3
Apartment	38%	-4
Boutique hotel	17%	+2

TRANSPORT TO THE  
DESTINATION

Car	36%	+14
Motorhome (camper)	3%	+0
Aeroplane	61%	-9

TRANSPORT AT THE  
DESTINATION

Car	88%	+17
On foot	28%	+0
Motorcycle	14%	+9
Train	17%	-2
Motorhome (camper)	8%	+4

## ACTIVITIES

History and castles	49%	+9
<u>Learning about the local way of life</u>	<u>34%</u>	<u>+14</u>
<u>Visit to a wine cellar</u>	<u>28%</u>	<u>+17</u>
Museums, galleries and art	40%	+6
Wellness and spa	30%	+6

## MOTIVATION

Articles on the Internet	44%	+13
Travel literature	39%	+9
Videos on the Internet	19%	+7
Travel presentations	32%	+3
Proximity of the destination	21%	+5

SOURCE OF  
INFORMATION

<u>Blogs</u>	<u>34%</u>	<u>+18</u>
Travel literature	41%	+6
Travel presentations	35%	+11
Articles in print media	24%	+8
Articles on the Internet	37%	-4

## RESERVATION METHOD

Directly at the accommodation provider	27%	+12
Airbnb	32%	+1
Expedia.com	28%	+6
<u>Agoda.com</u>	<u>16%</u>	<u>+10</u>
Other web portal	21%	+10

## TRAVELLING WITH

As a couple	62%	+8
Family	23%	-2
Alone	8%	+0
Relatives	3%	+2
Friends	3%	-8

## CHARACTERISTICS:

Size*	557,482
Share*	1%
Age	39
Women	23%

Spring	37%
Summer	58%
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.

# FRANCE: Urban consumers (20.3%)



## DESTINATION TYPE

Cities	<b>73%</b>	<b>+20</b>
Capitals	<b>45%</b>	<b>+3</b>
By the sea	53%	-8
Cultural and historical centres	35%	-7
Spas (wellness and spa)	6%	-1

## TYPE OF ACCOMMODATION

Hotel	<b>90%</b>	<b>+11</b>
Private accommodation (e.g. Airbnb)	<b>35%</b>	<b>+4</b>
Apartment	40%	-2
Own property (holiday cottage)	12%	+0
Staying with relatives or friends	22%	-5

## TRANSPORT TO THE DESTINATION

Aeroplane	<b>77%</b>	<b>+7</b>
Train	2%	+0
Car	19%	-3
Motorcycle	0%	-1
Coach	0%	-1

## TRANSPORT AT THE DESTINATION

Coach	<b>38%</b>	<b>+5</b>
On foot	<b>34%</b>	<b>+6</b>
Car	66%	-5
Train	19%	+0
Bicycle	6%	+0

## ACTIVITIES

Shopping	<b>51%</b>	<b>+19</b>
Sightseeing of a town, the capital	<b>78%</b>	<b>+14</b>
Recreation	<b>55%</b>	<b>+2</b>
Seeing major tourist attractions	<b>50%</b>	<b>+8</b>
Gastronomy	<b>49%</b>	<b>+12</b>

## MOTIVATION

Price of the destination	<b>43%</b>	<b>+3</b>
Suitability of the destination in all seasons	<b>27%</b>	<b>+3</b>
Popularity of the destination	<b>25%</b>	<b>+3</b>
Recommendations from friends	44%	+0
Travel literature	31%	+1

## SOURCE OF INFORMATION

Friends, family	53%	+1
Web portals (TripAdvisor etc.)	<b>30%</b>	<b>+5</b>
Opinions in social media	18%	+1
Travel literature	34%	-1
Agencies	<b>15%</b>	<b>+3</b>

## RESERVATION METHOD

Booking.com	<b>62%</b>	<b>+10</b>
Airbnb	32%	+2
Other web portal	<b>12%</b>	<b>+1</b>
Agency	21%	-1
Expedia.com	20%	-2

## TRAVELLING WITH

As a couple	<b>61%</b>	<b>+7</b>
Friends	11%	-1
Family	21%	-4
Relatives	1%	-1
Alone	6%	-2

## CHARACTERISTICS:

Size*	<b>4,634,723</b>
Share*	<b>12%</b>
Age	<b>41</b>
Women	<b>50%</b>

Spring	<b>43%</b>
Summer	<b>46%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

### 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.

n=307

# FRANCE: Green explorers (17.4%)



## DESTINATION TYPE

Cultural and historical centres	73%	+30
Capitals	67%	+25
In the mountains	61%	+29
By the sea	79%	+18
Elsewhere in nature	54%	+21

## TYPE OF ACCOMMODATION

Apartment	66%	+23
Private accommodation (e.g. Airbnb)	42%	+10
Hotel	81%	+2
Staying with relatives or friends	32%	+5
Camp	28%	+6

## TRANSPORT TO THE DESTINATION

Aeroplane	79%	+9
Train	3%	+0
Ship or another vessel	1%	+1
Coach	1%	+0
Car	14%	-8

## TRANSPORT AT THE DESTINATION

Coach	43%	+10
Train	28%	+9
Car	75%	+3
On foot	35%	+7
Bicycle	8%	+2

## ACTIVITIES

Sightseeing of old town centres	79%	+23
Natural sights, nature	74%	+24
Sports activities	60%	+28
Sightseeing of a town, the capital	77%	+12
Sun and sea	55%	+6

## MOTIVATION

Recommendations from friends	56%	+12
Price of the destination	44%	+5
Travel literature	36%	+6
Articles on the Internet	36%	+5
Travel presentations	35%	+6

## SOURCE OF INFORMATION

Friends, family	58%	+6
Articles on the Internet	49%	+8
Web portals (TripAdvisor etc.)	32%	+8
Travel literature	40%	+5
Travel presentations	27%	+2

## RESERVATION METHOD

Booking.com	58%	+7
Airbnb	42%	+12
Expedia.com	22%	+1
Directly at the accommodation provider	17%	+2
Other web portal	10%	+0

## TRAVELLING WITH

Family	26%	+2
Friends	13%	+2
As a couple	54%	+0
Relatives	2%	+0
Alone	5%	-3

## CHARACTERISTICS:

Size*	3,968,518
Share*	10%
Age	40
Women	40%

Spring	40%
Summer	44%
Shorter trips	2
Longer trips	2

## FRANCE: Sociable foodies (9.5%)



## DESTINATION TYPE

Cultural and historical centres	84%	<b>+42</b>
Cities	79%	<b>+26</b>
Capitals	71%	<b>+29</b>
By the sea	78%	<b>+18</b>
Countryside	39%	<b>+17</b>

## TYPE OF ACCOMMODATION

Hotel	96%	<b>+17</b>
Boutique hotel	33%	<b>+18</b>
Private accommodation (e.g. Airbnb)	39%	<b>+8</b>
Apartment	46%	<b>+4</b>
Staying with relatives or friends	27%	<b>+0</b>

## TRANSPORT TO THE DESTINATION

Aeroplane	74%	<b>+3</b>
Car	25%	<b>+3</b>
Coach	1%	<b>+0</b>
Train	1%	<b>-2</b>

## TRANSPORT AT THE DESTINATION

Car	82%	<b>+10</b>
On foot	40%	<b>+12</b>
Train	31%	<b>+12</b>
Coach	42%	<b>+10</b>
Bicycle	5%	<b>-1</b>

## ACTIVITIES

Sightseeing of old town centres	94%	<b>+38</b>
History and castles	86%	<b>+47</b>
Natural sights, nature	88%	<b>+38</b>
Seeing major tourist attractions	85%	<b>+43</b>
Sightseeing of a town, the capital	90%	<b>+26</b>

## MOTIVATION

Price of the destination	57%	<b>+18</b>
Travel literature	46%	<b>+17</b>
Articles on the Internet	43%	<b>+12</b>
Past experience	47%	<b>+9</b>
Recommendations from friends	51%	<b>+8</b>

## SOURCE OF INFORMATION

Articles on the Internet	58%	<b>+17</b>
Travel literature	47%	<b>+13</b>
Web portals (TripAdvisor etc.)	39%	<b>+15</b>
Opinions in social media	24%	<b>+8</b>
Friends, family	55%	<b>+3</b>

## RESERVATION METHOD

Booking.com	58%	<b>+6</b>
Directly at the accommodation provider	26%	<b>+11</b>
Airbnb	32%	<b>+1</b>
Through official TICs	11%	<b>+4</b>
Other web portal	14%	<b>+4</b>

## TRAVELLING WITH

As a couple	65%	<b>+11</b>
Family	25%	<b>+0</b>
Friends	9%	<b>-2</b>
Relatives	1%	<b>-1</b>

## CHARACTERISTICS:

Size*	<b>2,170,666</b>
Share*	<b>6%</b>
Age	<b>43</b>
Women	<b>45%</b>

Spring	<b>48%</b>
Summer	<b>39%</b>
Shorter trips	<b>2</b>
Longer trips	<b>1</b>

## NOTES:

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## FRANCE: Beauty and indulgence lovers (9.5%)



## DESTINATION TYPE

By the sea	<b>93%</b>	<b>+33</b>
In the mountains	26%	-5
<b>Spas (wellness and spa)</b>	<b>16%</b>	<b>+9</b>
Cities	35%	-18
Capitals	26%	-16

TYPE OF  
ACCOMMODATION

Hotel	<b>82%</b>	<b>+3</b>
<b>Apartment</b>	<b>47%</b>	<b>+4</b>
Staying with relatives or friends	28%	+2
Private accommodation (e.g. Airbnb)	31%	+0
Own property (holiday cottage)	15%	+3

TRANSPORT TO THE  
DESTINATION

Car	<b>31%</b>	<b>+9</b>
Train	3%	+0
Ship or another vessel	1%	+0
Aeroplane	65%	-6
Motorhome (camper)	1%	-2

TRANSPORT AT THE  
DESTINATION

Car	<b>81%</b>	<b>+10</b>
On foot	25%	-3
Bicycle	5%	-1
Coach	23%	-9
Motorcycle	4%	-2

## ACTIVITIES

Sun and sea	<b>81%</b>	<b>+32</b>
Shopping	59%	<b>+26</b>
Recreation	<b>77%</b>	<b>+24</b>
Wellness and spa	<b>46%</b>	<b>+22</b>
Seeing major tourist attractions	<b>50%</b>	<b>+9</b>

## MOTIVATION

Price of the destination	<b>48%</b>	<b>+9</b>
<b>Suitability of the destination in all seasons</b>	<b>38%</b>	<b>+14</b>
Recommendations from friends	43%	+0
Popularity of the destination	24%	+3
Proximity of the destination	19%	+3

SOURCE OF  
INFORMATION

<b>Friends, family</b>	<b>57%</b>	<b>+5</b>
Articles on the Internet	37%	-4
Web portals (TripAdvisor etc.)	23%	-1
Agencies	15%	+2
Opinions in social media	16%	+0

## RESERVATION METHOD

<b>Agency</b>	<b>25%</b>	<b>+3</b>
<b>Directly at the accommodation provider</b>	<b>18%</b>	<b>+3</b>
<b>Other web portal</b>	<b>17%</b>	<b>+7</b>
Airbnb	28%	-3
Booking.com	41%	-10

## TRAVELLING WITH

<b>Family</b>	<b>43%</b>	<b>+18</b>
As a couple	50%	-4
Alone	3%	-5
Relatives	1%	-1
Friends	3%	-9

## CHARACTERISTICS:

Size*	<b>2,179,890</b>
Share*	<b>6%</b>
Age	<b>41</b>
Women	<b>59%</b>

Spring	<b>32%</b>
Summer	<b>58%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## NOTES:

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## FRANCE: Relaxed escapists (9.4%)



## DESTINATION TYPE

Countryside	20%	-2
By the sea	44%	-17
Cultural and historical centres	21%	-21
Elsewhere in nature	18%	-15
By a lake	11%	-11

## TYPE OF ACCOMMODATION

<u>Boutique hotel</u>	<u>20%</u>	<u>+4</u>
Hostel	20%	-5
Hotel	69%	-10
Camper	7%	-1
Apartment	24%	-19

## TRANSPORT TO THE DESTINATION

<u>Motorhome (camper)</u>	<u>4%</u>	<u>+2</u>
Car	23%	+2
<u>Motorcycle</u>	<u>3%</u>	<u>+2</u>
Train	4%	+1
Aeroplane	66%	-5

## TRANSPORT AT THE DESTINATION

Car	62%	-9
<u>Motorcycle</u>	<u>8%</u>	<u>+3</u>
Coach	21%	-12
Motorhome (camper)	3%	-1
Train	9%	-10

## ACTIVITIES

Thermal health spas	<b>23%</b>	<b>+10</b>
<u>Selfness, digital-detox, etc.</u>	<u>16%</u>	<u>+10</u>
Natural sights, nature	45%	-5
Gastronomy	28%	-9
Learning about the local way of life	13%	-6

## MOTIVATION

Suitability of the destination in all seasons	21%	-3
Recommendations from friends	31%	-12
Travel presentations	21%	-8
Articles in print media	10%	-2
TV programmes	7%	-1

## SOURCE OF INFORMATION

Travel presentations	21%	-3
Blogs	14%	-2
Articles in print media	14%	-1
Travel literature	23%	-11
Agencies	12%	-1

## RESERVATION METHOD

<u>Agency</u>	<u>26%</u>	<u>+4</u>
<u>Agoda.com</u>	<u>8%</u>	<u>+3</u>
Expedia.com	18%	-3
Organiser	8%	+0
Booking.com	39%	-13

## TRAVELLING WITH

As a couple	54%	+0
Friends	13%	+2
Family	24%	-1
Alone	8%	+0
Relatives	2%	+0

## CHARACTERISTICS:

Size*	<b>2,140,323</b>
Share*	<b>5%</b>
Age	<b>40</b>
Women	<b>48%</b>

Spring	<b>47%</b>
Summer	<b>38%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## NOTES:

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# FRANCE: Forever young (8.5%)



## DESTINATION TYPE

By the sea	55%	-5
Cultural and historical centres	37%	-5
Capitals	24%	-18
Elsewhere in nature	19%	-14
Countryside	13%	-9

## TYPE OF ACCOMMODATION

<b>Hotel</b>	<b>84%</b>	<b>+5</b>
Staying with relatives or friends	26%	-1
Tourist farm	14%	+2
Camp	20%	-2
Camper	8%	+1

## TRANSPORT TO THE DESTINATION

<b>Coach</b>	<b>4%</b>	<b>+3</b>
Train	4%	+1
Aeroplane	67%	-3
Car	21%	-1
<b>Bicycle</b>	<b>1%</b>	<b>+1</b>

## TRANSPORT AT THE DESTINATION

Car	68%	-3
Coach	30%	-3
Bicycle	5%	-1
Motorcycle	4%	-1
On foot	19%	-9

## ACTIVITIES

<b>Sightseeing of old town centres</b>	<b>72%</b>	<b>+16</b>
<b>History and castles</b>	<b>59%</b>	<b>+20</b>
<b>Touring</b>	<b>34%</b>	<b>+17</b>
<b>Recreation</b>	<b>58%</b>	<b>+5</b>
<b>Seeing major tourist attractions</b>	<b>48%</b>	<b>+6</b>

## MOTIVATION

<b>Articles on the Internet</b>	<b>35%</b>	<b>+4</b>
Travel literature	31%	+1
Videos on the Internet	14%	+2
Price of the destination	34%	-5
Travel presentations	29%	-1

## SOURCE OF INFORMATION

Articles on the Internet	42%	+2
Travel literature	34%	+0
Travel presentations	24%	+0
Friends, family	46%	-5
Opinions in social media	14%	-2

## RESERVATION METHOD

<b>Agency</b>	<b>28%</b>	<b>+6</b>
Expedia.com	24%	+2
Directly at the accommodation provider	15%	+0
Other	4%	+2
Organiser	9%	+1

## TRAVELLING WITH

<b>Alone</b>	<b>11%</b>	<b>+3</b>
As a couple	47%	-7
Family	24%	+0
<b>Friends</b>	<b>14%</b>	<b>+3</b>
<b>Relatives</b>	<b>3%</b>	<b>+1</b>

## CHARACTERISTICS:

Size*	<b>1,953,148</b>
Share*	<b>5%</b>
Age	<b>41</b>
Women	<b>37%</b>

Spring	<b>40%</b>
Summer	<b>48%</b>
Shorter trips	<b>2</b>
Longer trips	<b>1</b>

### NOTES:

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## FRANCE: Active nostalgists (7.1%)



## DESTINATION TYPE

<u>Elsewhere in nature</u>	<b>65%</b>	<b>+32</b>
<u>By a lake</u>	<b>52%</b>	<b>+31</b>
<u>In the mountains</u>	<b>52%</b>	<b>+21</b>
<u>Countryside</u>	<b>28%</b>	<b>+6</b>
By the sea	38%	-23

TYPE OF  
ACCOMMODATION

<u>Boutique hotel</u>	<b>30%</b>	<b>+15</b>
<u>Camp</u>	<b>28%</b>	<b>+6</b>
<u>Tourist farm</u>	<b>22%</b>	<b>+10</b>
Hotel	76%	-3
Hostel	27%	+1

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	<b>33%</b>	<b>+11</b>
Motorhome (camper)	3%	+1
Aeroplane	60%	-10
Train	2%	-1
Motorcycle	1%	+0

TRANSPORT AT THE  
DESTINATION

<u>Car</u>	<b>83%</b>	<b>+11</b>
<u>Motorhome (camper)</u>	<b>7%</b>	<b>+4</b>
Coach	13%	-19
On foot	11%	-17
Bicycle	7%	+1

## ACTIVITIES

<u>Sports activities</u>	<b>52%</b>	<b>+21</b>
<u>Winter sports</u>	<b>23%</b>	<b>+8</b>
<u>Wellness and spa</u>	<b>28%</b>	<b>+4</b>
<u>Health treatments and services</u>	<b>19%</b>	<b>+8</b>
<u>Visit to a wine cellar</u>	<b>19%</b>	<b>+7</b>

## MOTIVATION

Past experience	35%	-3
Articles in print media	15%	+2
Travel presentations	27%	-3
Recommendations from friends	35%	-8
Posts on social media, blogs	15%	+1

SOURCE OF  
INFORMATION

Travel literature	35%	+0
Friends, family	49%	-3
Travel presentations	24%	+0
Articles on the Internet	28%	-12
Blogs	12%	-5

## RESERVATION METHOD

Agency	24%	+3
<u>Organiser</u>	<b>16%</b>	<b>+7</b>
Expedia.com	21%	-1
At the activity provider	8%	+4
Airbnb	25%	-6

## TRAVELLING WITH

<u>As a couple</u>	<b>60%</b>	<b>+6</b>
<u>Alone</u>	<b>15%</b>	<b>+7</b>
Family	19%	-6
Relatives	1%	-1
Friends	6%	-6

## CHARACTERISTICS:

Size*	<b>1,623,402</b>
Share*	<b>4%</b>
Age	<b>37</b>
Women	<b>38%</b>

Spring	<b>33%</b>
Summer	<b>53%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

## NOTES:

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## FRANCE: Urban conscious (6.8%)



## DESTINATION TYPE

Capitals	62%	+20
Cities	65%	+13
Cultural and historical centres	58%	+16
Countryside	14%	-8
Elsewhere in nature	21%	-12

## TYPE OF ACCOMMODATION

Hostel	44%	+18
Private accommodation (e.g. Airbnb)	45%	+14
Staying with relatives or friends	41%	+14
Tourist farm	17%	+6
Hotel	65%	-14

## TRANSPORT TO THE DESTINATION

Aeroplane	77%	+7
Motorcycle	3%	+2
Train	3%	+0
Car	15%	-7
Coach	1%	+0

## TRANSPORT AT THE DESTINATION

Coach	50%	+18
Train	35%	+16
On foot	37%	+9
Car	57%	-15
Bicycle	8%	+2

## ACTIVITIES

Museums, galleries and art	74%	+40
Learning about the local way of life	62%	+43
Sightseeing of a town, the capital	82%	+18
Sightseeing of old town centres	79%	+23
Social events, festivals	48%	+26

## MOTIVATION

Travel presentations	45%	+16
Past experience	48%	+10
Price of the destination	45%	+5
Travel literature	38%	+8
Videos on the Internet	20%	+7

## SOURCE OF INFORMATION

Articles on the Internet	52%	+12
Travel literature	46%	+11
Web forums	23%	+8
Travel presentations	30%	+5
Opinions in social media	23%	+7

## RESERVATION METHOD

Directly at the accommodation provider	26%	+11
Booking.com	56%	+5
Airbnb	37%	+6
Through official TICs	11%	+4
Other web portal	13%	+2

## TRAVELLING WITH

Alone	14%	+6
As a couple	53%	-2
Family	17%	-7
Friends	11%	+0
Relatives	4%	+3

## CHARACTERISTICS:

Size*	1,561,237
Share*	4%
Age	43
Women	53%

Spring	51%
Summer	25%
Shorter trips	2
Longer trips	2

## NOTES:

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## FRANCE: Carefree youth (4.1%)



## DESTINATION TYPE

<u>By the sea</u>	<b>79%</b>	<b>+18</b>
<u>Cities</u>	<b>67%</b>	<b>+15</b>
Capitals	40%	-2
Elsewhere in nature	24%	-9
Countryside	17%	-5

TYPE OF  
ACCOMMODATION

<u>Hostel</u>	<b>58%</b>	<b>+33</b>
<u>Staying with relatives or friends</u>	<b>39%</b>	<b>+12</b>
Camp	27%	+5
Private accommodation (e.g. Airbnb)	28%	-3
Glamping	8%	+3

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	<b>33%</b>	<b>+11</b>
Coach	2%	+1
Train	3%	+0
Motorcycle	2%	+1
Aeroplane	61%	-10

TRANSPORT AT THE  
DESTINATION

On foot	33%	+5
<u>Train</u>	<b>24%</b>	<b>+5</b>
<u>Motorhome (camper)</u>	<b>11%</b>	<b>+8</b>
Car	53%	-18
Coach	23%	-10

## ACTIVITIES

<u>Sun and sea</u>	<b>65%</b>	<b>+16</b>
<u>Music festivals and concerts</u>	<b>41%</b>	<b>+24</b>
<u>Nightlife (bars, clubs)</u>	<b>41%</b>	<b>+25</b>
Sightseeing of a town, the capital	66%	+2
Social events, festivals	26%	+3

## MOTIVATION

<u>Articles on the Internet</u>	<b>37%</b>	<b>+5</b>
Past experience	41%	+3
<u>Popularity of the destination</u>	<b>27%</b>	<b>+6</b>
Recommendations from friends	44%	+1
Travel presentations	32%	+3

SOURCE OF  
INFORMATION

Friends, family	55%	+4
Opinions in social media	21%	+4
<u>Web forums</u>	<b>19%</b>	<b>+5</b>
Travel presentations	26%	+2
Travel literature	30%	-5

## RESERVATION METHOD

<u>Airbnb</u>	<b>37%</b>	<b>+6</b>
<u>Agoda.com</u>	<b>14%</b>	<b>+8</b>
<u>Own accommodation</u>	<b>10%</b>	<b>+8</b>
Booking.com	46%	-6
Expedia.com	20%	-2

## TRAVELLING WITH

<u>Friends</u>	<b>22%</b>	<b>+10</b>
As a couple	41%	-13
<u>Alone</u>	<b>15%</b>	<b>+7</b>
Family	19%	-5
Relatives	3%	+1

## CHARACTERISTICS:

Size*	<b>933,816</b>
Share*	<b>2%</b>
Age	<b>35</b>
Women	<b>40%</b>

Spring	<b>35%</b>
Summer	<b>54%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

## FRANCE: Adventurists (3.6%)



## DESTINATION TYPE

In the mountains	59%	+28
Elsewhere in nature	57%	+24
By a lake	34%	+13
Countryside	32%	+9
By the sea	41%	-20

TYPE OF  
ACCOMMODATION

Hostel	49%	+24
Camp	40%	+18
Boutique hotel	28%	+13
Glamping	20%	+15
Tourist farm	21%	+9

TRANSPORT TO THE  
DESTINATION

Motorhome (camper)	15%	+12
Motorcycle	6%	+5
Aeroplane	55%	-15
Car	17%	-5
Ship or another vessel	4%	+3

TRANSPORT AT THE  
DESTINATION

Motorcycle	21%	+15
Car	62%	-9
Motorhome (camper)	13%	+9
Coach	18%	-15
Train	12%	-7

## ACTIVITIES

Adrenaline sports challenges	54%	+45
History and castles	65%	+26
Water sports activities	36%	+20
Mountaineering (more challenging tours)	33%	+27
Winter sports	28%	+14

## MOTIVATION

Travel presentations	32%	+2
Past experience	36%	-2
Posts on social media, blogs	20%	+6
Web ads	11%	+5
Articles in print media	15%	+3

SOURCE OF  
INFORMATION

Friends, family	47%	-5
Articles on the Internet	36%	-4
Articles in print media	21%	+5
Blogs	11%	-5
Travel presentations	17%	-8

## RESERVATION METHOD

Expedia.com	34%	+12
Agency	31%	+9
Agoda.com	18%	+13
Organiser	13%	+5
Through official TICs	6%	+0

## TRAVELLING WITH

Friends	27%	+16
Alone	21%	+13
As a couple	30%	-24
Family	18%	-7
Relatives	4%	+2

## CHARACTERISTICS:

Size*	831,174
Share*	2%
Age	32
Women	31%

Spring	39%
Summer	54%
Shorter trips	3
Longer trips	2

## NOTES:

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## FRANCE: Devoted mothers (1.9%)



## DESTINATION TYPE

By a lake	52%	+31
<u>Elsewhere in nature</u>	49%	+16
In the mountains	33%	+1
<u>Countryside</u>	32%	+10
Capitals	20%	-22

TYPE OF  
ACCOMMODATION

<u>Tourist farm</u>	61%	+49
Camp	42%	+20
Apartment	55%	+12
<u>Hostel</u>	40%	+15
<u>Camper</u>	22%	+15

TRANSPORT TO THE  
DESTINATION

Car	33%	+11
<u>Motorhome (camper)</u>	13%	+11
<u>Motorcycle</u>	3%	+2
Aeroplane	48%	-23
<u>Coach</u>	3%	+2

TRANSPORT AT THE  
DESTINATION

<u>Motorhome (camper)</u>	18%	+14
Car	78%	+6
<u>Motorcycle</u>	14%	+9
Train	6%	-13
Coach	9%	-23

## ACTIVITIES

<u>Activities and fun for children</u>	58%	+46
<u>Learning about the local way of life</u>	35%	+15
<u>Countryside, farm activities</u>	25%	+13
Sports activities	32%	+0
<u>Winter sports</u>	24%	+9

## MOTIVATION

Travel presentations	37%	+7
Posts on social media, blogs	20%	+6
<u>TV ads</u>	16%	+10
Past experience	36%	-2
Articles on the Internet	35%	+4

SOURCE OF  
INFORMATION

<u>Articles on the Internet</u>	52%	+12
<u>Articles in print media</u>	35%	+19
Travel presentations	19%	-5
Friends, family	38%	-14
Web forums	8%	-6

## RESERVATION METHOD

<u>Expedia.com</u>	41%	+19
Booking.com	60%	+8
Agoda.com	9%	+4
Organiser	10%	+2
Agency	13%	-9

## TRAVELLING WITH

<u>Alone</u>	18%	+10
As a couple	50%	-5
Friends	15%	+3
Family	18%	-7

## CHARACTERISTICS:

Size*	432,613
Share*	1%
Age	35
Women	41%

Spring	20%
Summer	68%
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.

## FRANCE: Active families (1.9%)



## DESTINATION TYPE

<u>Elsewhere in nature</u>	<b>70%</b>	<b>+37</b>
<u>In the mountains</u>	<b>54%</b>	<b>+23</b>
<u>By a lake</u>	<b>41%</b>	<b>+19</b>
Countryside	20%	-3
By the sea	46%	-15

TYPE OF  
ACCOMMODATION

<u>Apartment</u>	<b>62%</b>	<b>+20</b>
<u>Boutique hotel</u>	<b>34%</b>	<b>+19</b>
<u>Camper</u>	<b>25%</b>	<b>+17</b>
<u>Camp</u>	<b>34%</b>	<b>+12</b>
Staying with relatives or friends	30%	+3

TRANSPORT TO THE  
DESTINATION

<u>Motorhome (camper)</u>	<b>16%</b>	<b>+14</b>
Car	22%	+0
<u>Train</u>	<b>8%</b>	<b>+5</b>
Aeroplane	53%	-17

TRANSPORT AT THE  
DESTINATION

<u>Motorhome (camper)</u>	<b>27%</b>	<b>+23</b>
Car	70%	-2
<u>Motorcycle</u>	<b>10%</b>	<b>+5</b>
Coach	14%	-18
On foot	11%	-17

## ACTIVITIES

<u>Sports activities</u>	<b>64%</b>	<b>+32</b>
<u>Water sports activities</u>	<b>47%</b>	<b>+31</b>
<u>Mountaineering (more challenging tours)</u>	<b>36%</b>	<b>+30</b>
<u>Thermal health spas</u>	<b>29%</b>	<b>+15</b>
Natural sights, nature	51%	+2

## MOTIVATION

<u>Past experience</u>	<b>50%</b>	<b>+12</b>
Travel presentations	34%	+5
TV programmes	15%	+8
Posts on social media, blogs	19%	+5
Articles in print media	18%	+5

SOURCE OF  
INFORMATION

Blogs	28%	+12
Articles on the Internet	40%	-1
Travel literature	35%	+1
Travel presentations	32%	+8
<u>Opinions in social media</u>	<b>25%</b>	<b>+8</b>

## RESERVATION METHOD

<u>Booking.com</u>	<b>70%</b>	<b>+19</b>
<u>Expedia.com</u>	<b>37%</b>	<b>+15</b>
<u>Agoda.com</u>	<b>14%</b>	<b>+9</b>
<u>Own accommodation</u>	<b>10%</b>	<b>+8</b>
Airbnb	32%	+2

## TRAVELLING WITH

<u>Family</u>	<b>42%</b>	<b>+18</b>
As a couple	45%	-9
Alone	13%	+5

## CHARACTERISTICS:

Size*	<b>437,004</b>
Share*	<b>1%</b>
Age	<b>36</b>
Women	<b>35%</b>

Spring	<b>40%</b>
Summer	<b>50%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

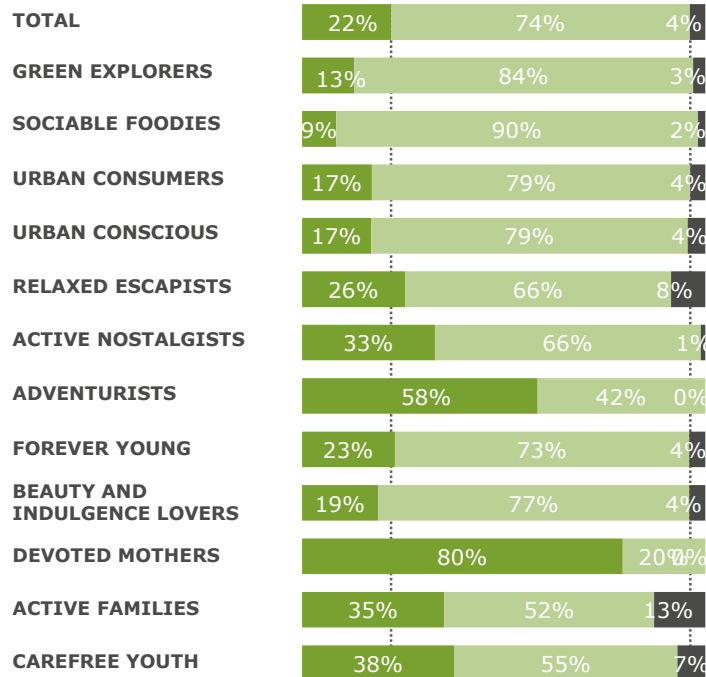
## NOTES:

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.

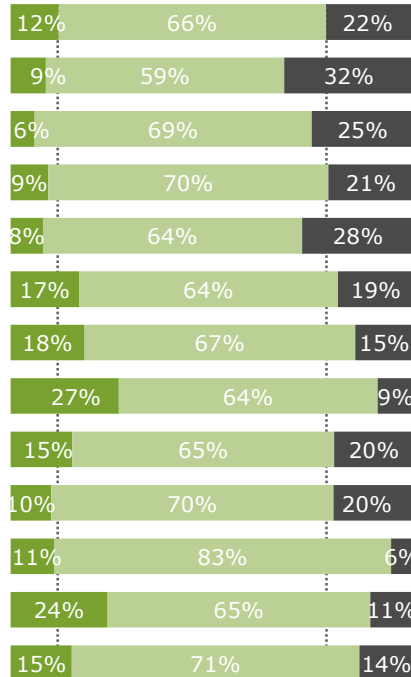
# FRANCE: Price sensitivity



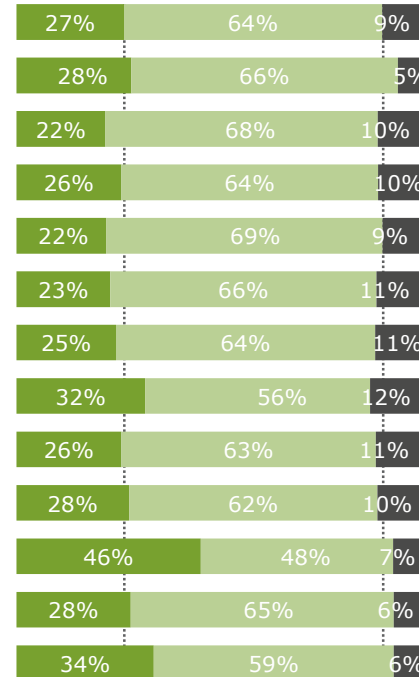
## CHOICE OF ACCOMMODATION



## CHOICE OF DESTINATION



## CHOICE OF TRANSPORT

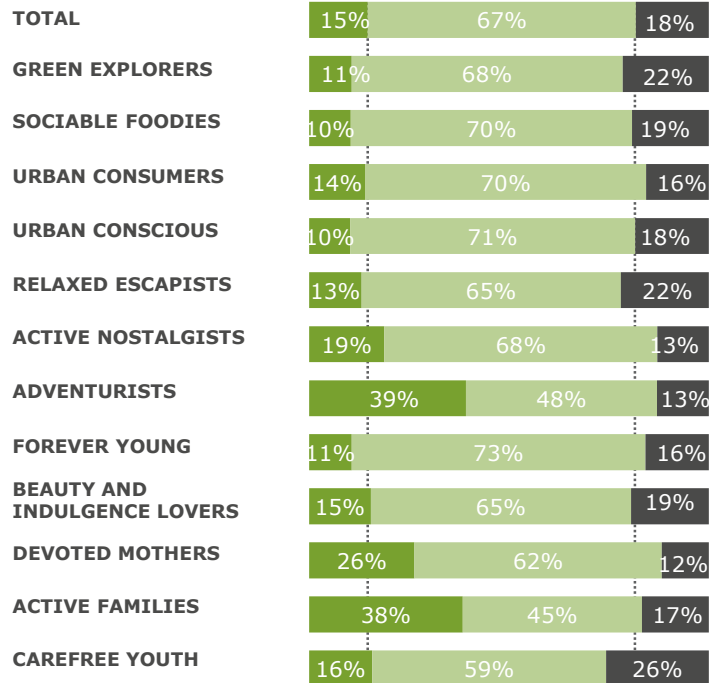


seek the most favourable offer
  assess value for money
  disregard the price

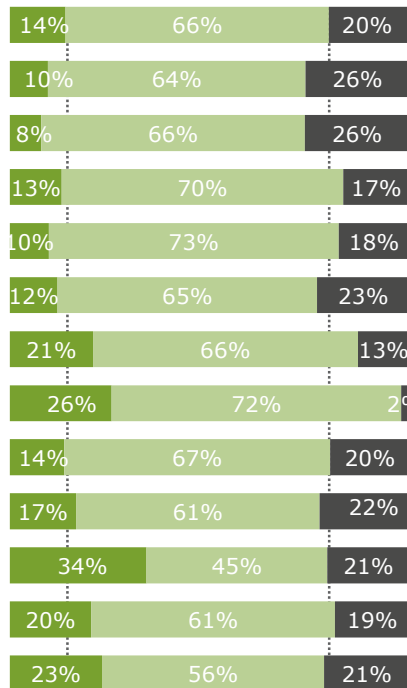
# FRANCE: Price sensitivity



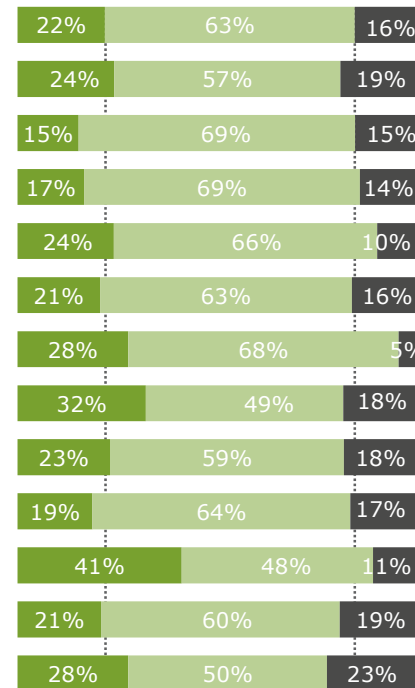
## CHOICE OF ADDITIONAL ACTIVITIES



## CHOICE OF FOOD



## SHOPPING



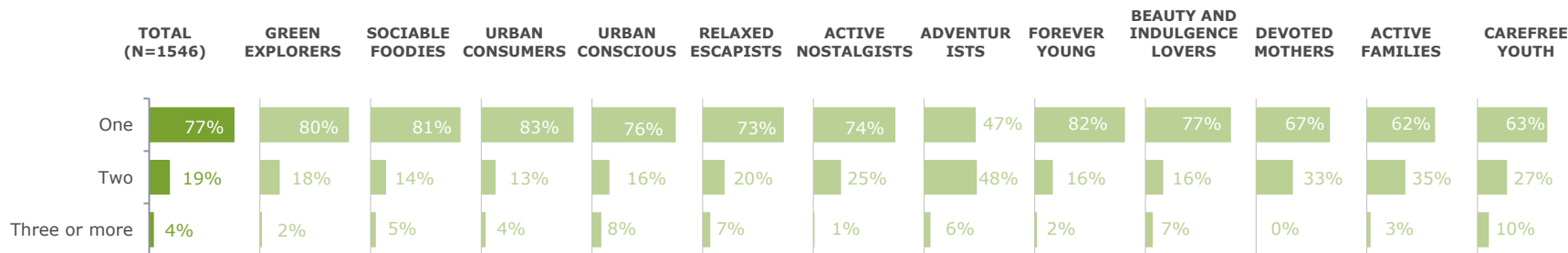
seek the most favourable offer
  assess value for money
  disregard the price



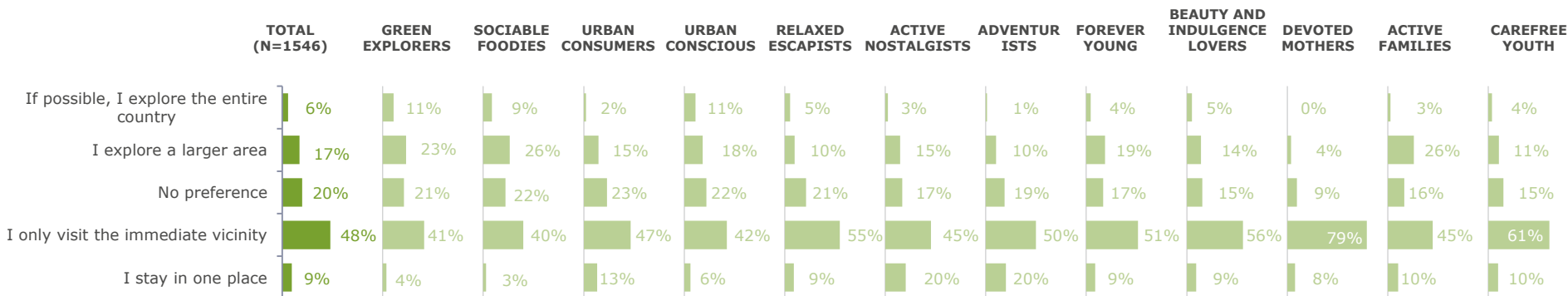
# FRANCE: Level of exploration



## Number of countries visited during one trip, break or holiday



## Exploring in one country



# **GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY**



## FRANCE: General travel habits and motives



## CHARACTERISTICS OF THE TARGET GROUP:

Size	22,866,512	Spring	41%
Proportion	58.1%	Summer	46%
Age	40	Shorter trips	2
Women	45%	Longer trips	2

## TRAVELLING WITH:

As a couple	54%
Family	25%
Friends	11%
Alone	8%
Relatives	2%

## DESTINATION TYPE:

By the sea	33%	28%	61%
Towns	21%	32%	52%
Cult. and hist. centres	12%	30%	42%

4 x  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of a town, capital	64%
sightseeing of old town centres	56%
Recreation	53%
Natural parks, attractions	50%
Sun and sea	49%
Tourist sights	42%
History and castles	40%
Gastronomic pleasures	38%
Museums, galleries, art	34%
Shopping	33%

## TRAVEL MOTIVES – TOP 10:

To learn something new	18%	43%
Visit a beautiful destination	15%	41%
Experience another culture	8%	34%
Visit a town, the capital	13%	34%
Retreat from everyday life	8%	29%
Spend time with partner	6%	23%
Relaxation	6%	20%
Enjoy good food, drinks	2%	20%
Spend time with family, strengthen bonds	4%	14%
Rest, slow down the pace of life	4%	13%

## VISITING COUNTRIES – TOP 10:

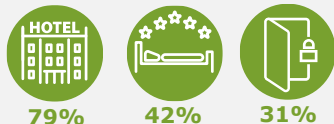
Spain	36%	45%
Italy	37%	44%
United Kingdom	23%	32%
Portugal	22%	29%
Non-European countries	18%	25%
Belgium	14%	24%
Greece	18%	24%
Germany	14%	23%
Netherlands	10%	17%
Switzerland	8%	16%
Slovenia	1%	2%

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 they have visited so far and would visit again (Top 10, compared with Slovenia).

## FRANCE: Elements of the purchase journey and consumption

TYPE OF  
ACCOMMODATION:

Other frequent accommodation types:

**Relatives, friends: 27%**

**Hostel: 26%**

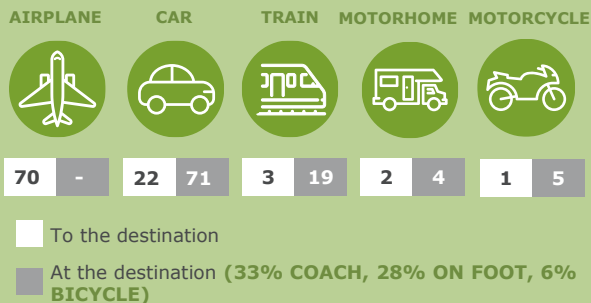
**Camp: 22%**

## RESERVATION

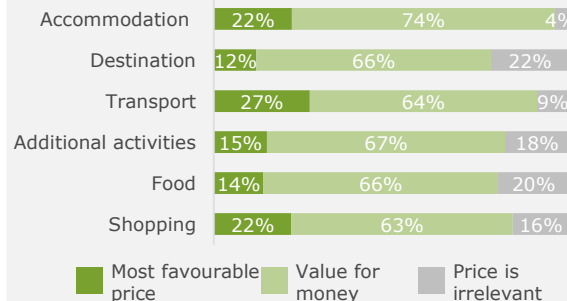


**83%**

## TRANSPORT MODE (%):

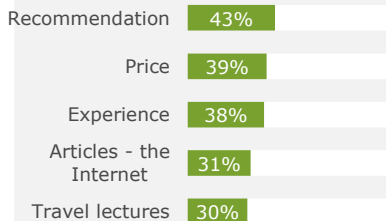


## PRICE SENSITIVITY:

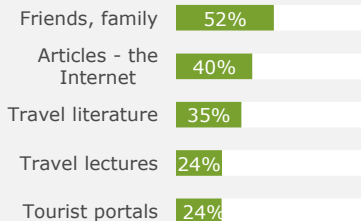


## PURCHASE JOURNEY:

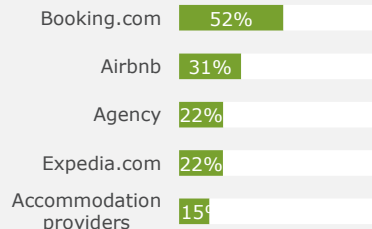
## MOTIVATIONS:



## SOURCES OF INFORMATION:



## RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€66	€70
TRANSPORT per person	€147	€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.

# FRANCE: General travel habits and motives

Subsample: visitors to Slovenia



## CHARACTERISTICS OF VISITORS TO SLOVENIA:

Size	3,375,079	Spring	46%
Proportion	8.6%	Summer	45%
Age	36	Shorter trips	3
Women	32%	Longer trips	2

## TRAVELLING WITH:

As a couple	47%
Family	22%
Alone	20%
Friends	11%
Relatives	1%

## DESTINATION TYPE:

By the sea	27%	29%	56%
Towns	15%	30%	45%
In the mountains	12%	32%	44%

5x  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

History and castles	43%
Recreation	42%
Sightseeing of a town, capital	42%
Sightseeing old town centres	38%
Sports activities	34%
Tourist attractions	32%
Sun and sea	32%
Natural parks, attractions	32%
Wellness and (beauty) spa	31%
Gastronomic pleasures	28%

## TRAVEL MOTIVES – TOP 10:

To learn something new	15%	33%
Visit a town, the capital	12%	32%
Visit a beautiful destination	14%	32%
Retreat from everyday life	7%	25%
Experience another culture	4%	24%
Relaxation	10%	22%
Enjoy good food, drinks	3%	19%
Spend time with partner	5%	17%
Clear your head, gather thoughts	2%	16%
Rest, slow down the pace of life	4%	15%

## VISITING COUNTRIES – TOP 10:

Italy	37%	41%
Belgium	19%	31%
Portugal	21%	30%
Germany	21%	30%
Spain	24%	30%
Greece	22%	29%
United Kingdom	17%	28%
Austria	12%	24%
Switzerland	12%	23%
Netherlands	12%	20%
Slovenia	7%	13%

Repeated visit  
Visit

## NOTES:

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

FRANCE: Elements of the purchase journey and  
consumption

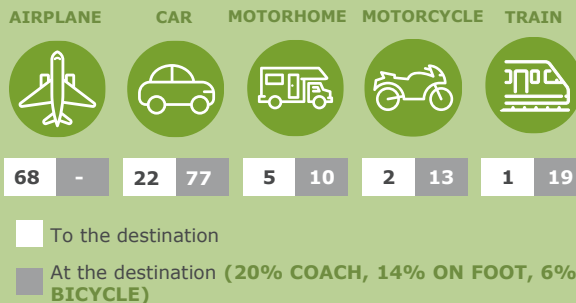
Subsample: visitors to Slovenia

TYPE OF  
ACCOMMODATION:Other frequent  
accommodation types:**Boutique hotel: 28%****Camp: 27%****Relatives, friends: 23%**

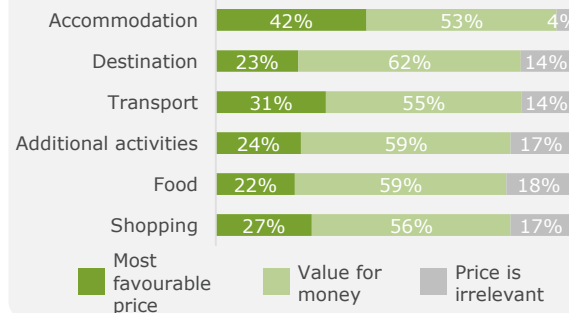
## RESERVATION

UP  
TO 3  
months in  
advance**89%**

## TRANSPORT MODE (%):

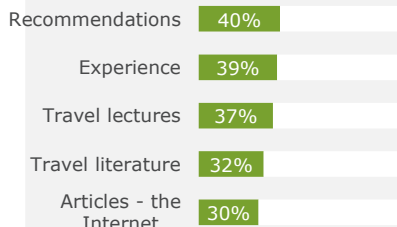


## PRICE SENSITIVITY:

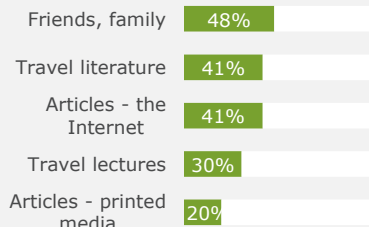


## PURCHASE JOURNEY:

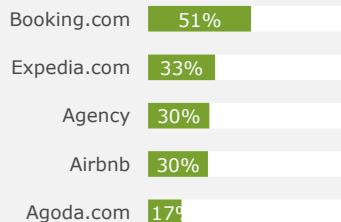
## MOTIVATIONS:



## SOURCES OF INFORMATION:



## RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€68	€67
TRANSPORT per person	€138	€143

## 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.

# FRANCE: General travel habits and motives

*Subsample: tourists in Slovenia*



## CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size	<b>557,482</b>	Spring	<b>37%</b>
Proportion	<b>1.4%</b>	Summer	<b>58%</b>
Age	<b>39</b>	Shorter trips	<b>3</b>
Women	<b>23%</b>	Longer trips	<b>2</b>

## TRAVELLING WITH:

As a couple	<b>62%</b>
Family	<b>23%</b>
Alone	<b>8%</b>
Friends	<b>3%</b>
Relatives	<b>2%</b>

## DESTINATION TYPE:

By the sea	<b>28%</b>	<b>38%</b>	<b>66%</b>
Towns	<b>19%</b>	<b>38%</b>	<b>57%</b>
Cult. and hist. centres	<b>17%</b>	<b>24%</b>	<b>41%</b>

**5x**  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of a town, the capital	<b>54%</b>
Recreation	<b>50%</b>
History and castles	<b>49%</b>
Sightseeing of old town centres	<b>46%</b>
Sun and sea	<b>45%</b>
Gastronomic pleasures	<b>42%</b>
Nature parks, attractions	<b>42%</b>
Museums, galleries, art	<b>40%</b>
Tourist attractions	<b>38%</b>
Live like a local	<b>34%</b>

## TRAVEL MOTIVES – TOP 10:

Visit a beautiful destination	<b>24%</b>	<b>49%</b>
Enjoy good food, drinks	<b>6%</b>	<b>33%</b>
Retreat from everyday life	<b>5%</b>	<b>31%</b>
Experience another culture	<b>9%</b>	<b>30%</b>
To learn something new	<b>13%</b>	<b>30%</b>
Relaxation	<b>14%</b>	<b>22%</b>
Visit a town, the capital	<b>10%</b>	<b>22%</b>
Spend time actively	<b>3%</b>	<b>18%</b>
Live like a local	<b>0%</b>	<b>15%</b>
Spend time with friends	<b>5%</b>	<b>14%</b>

## VISITING COUNTRIES – TOP 10:

Slovenia	<b>51%</b>	<b>100%</b>
Italy	<b>51%</b>	<b>63%</b>
Spain	<b>41%</b>	<b>59%</b>
Belgium	<b>32%</b>	<b>55%</b>
Germany	<b>16%</b>	<b>48%</b>
United Kingdom	<b>19%</b>	<b>40%</b>
Croatia	<b>30%</b>	<b>39%</b>
Greece	<b>26%</b>	<b>38%</b>
Switzerland	<b>13%</b>	<b>38%</b>
Netherlands	<b>23%</b>	<b>37%</b>

**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).

FRANCE: Elements of the purchase journey and  
consumption

Subsample: tourists in Slovenia

TYPE OF  
ACCOMMODATION:

82%



38%



27%

Other frequent  
accommodation types:Private accommodation:  
22%

Boutique hotel: 17%

Tourist farm 15%

## RESERVATION

UP  
TO 3  
months in  
advance

87%

## TRANSPORT MODE (%):

AIRPLANE

CAR

MOTORHOME



61

-

36

88

3

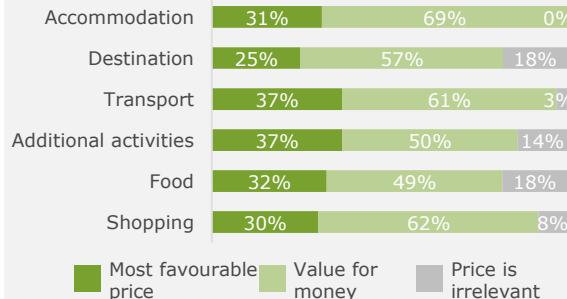
8



To the destination

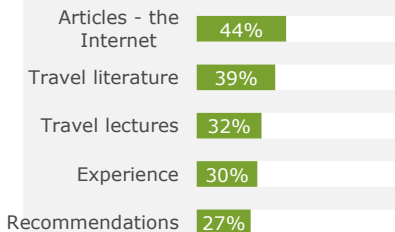
At the destination (28% ON FOOT, 17% TRAIN, 16%  
MOTORCYCLE)

## PRICE SENSITIVITY:

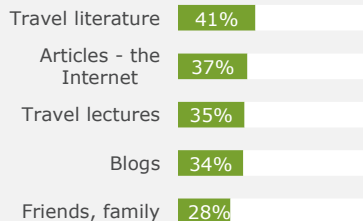


## PURCHASE JOURNEY:

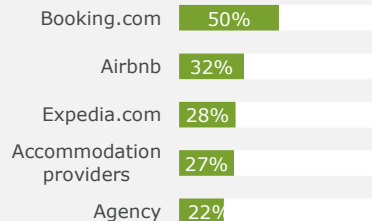
## MOTIVATIONS:



## SOURCES OF INFORMATION:



## RESERVATION METHOD:



## BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	€77	€80
	in SLO	€55	€53
TRANSPORT per person	in Europe	€175	€176
	in SLO	€150	€149

## 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.

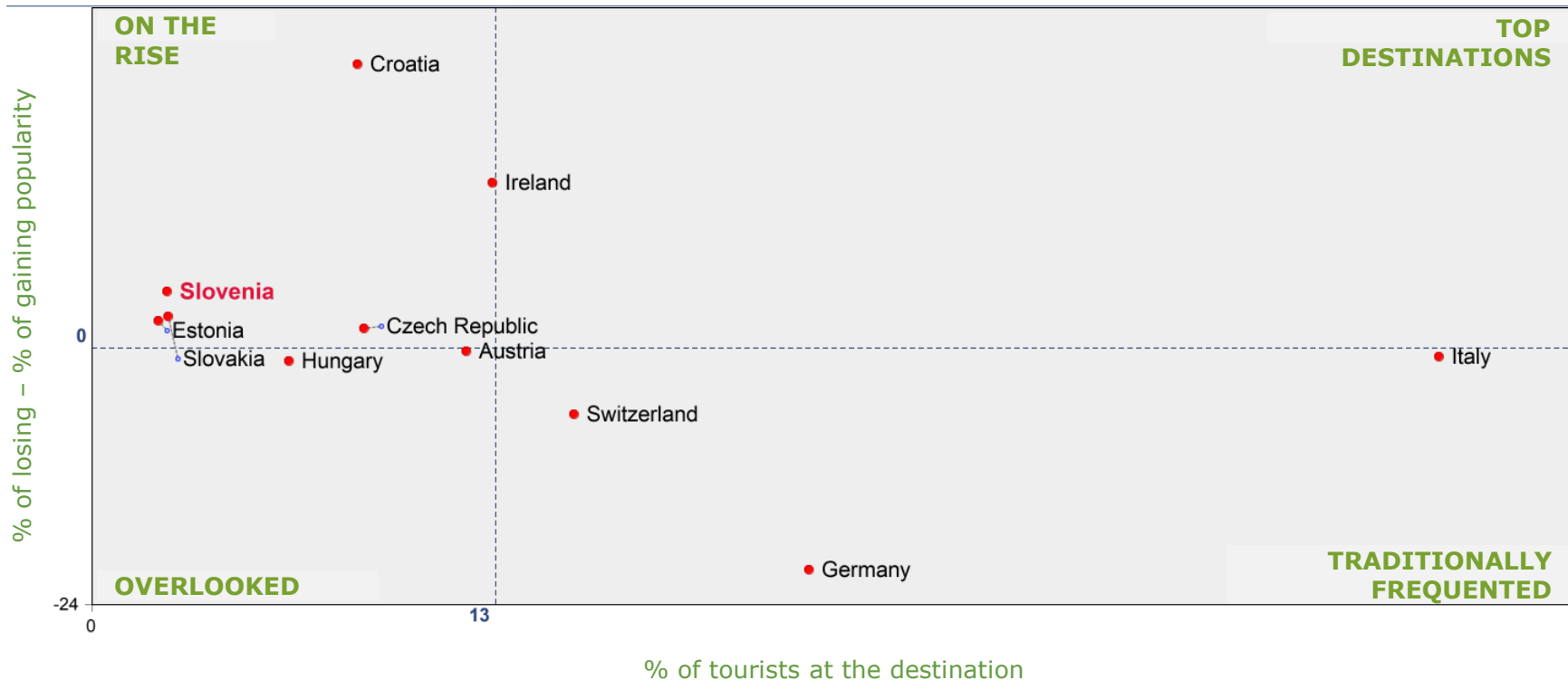


# **IMAGE AND PERCEPTION OF SLOVENIA**



# FRANCE: Destination relevance

Share of visitors by popularity of the destination

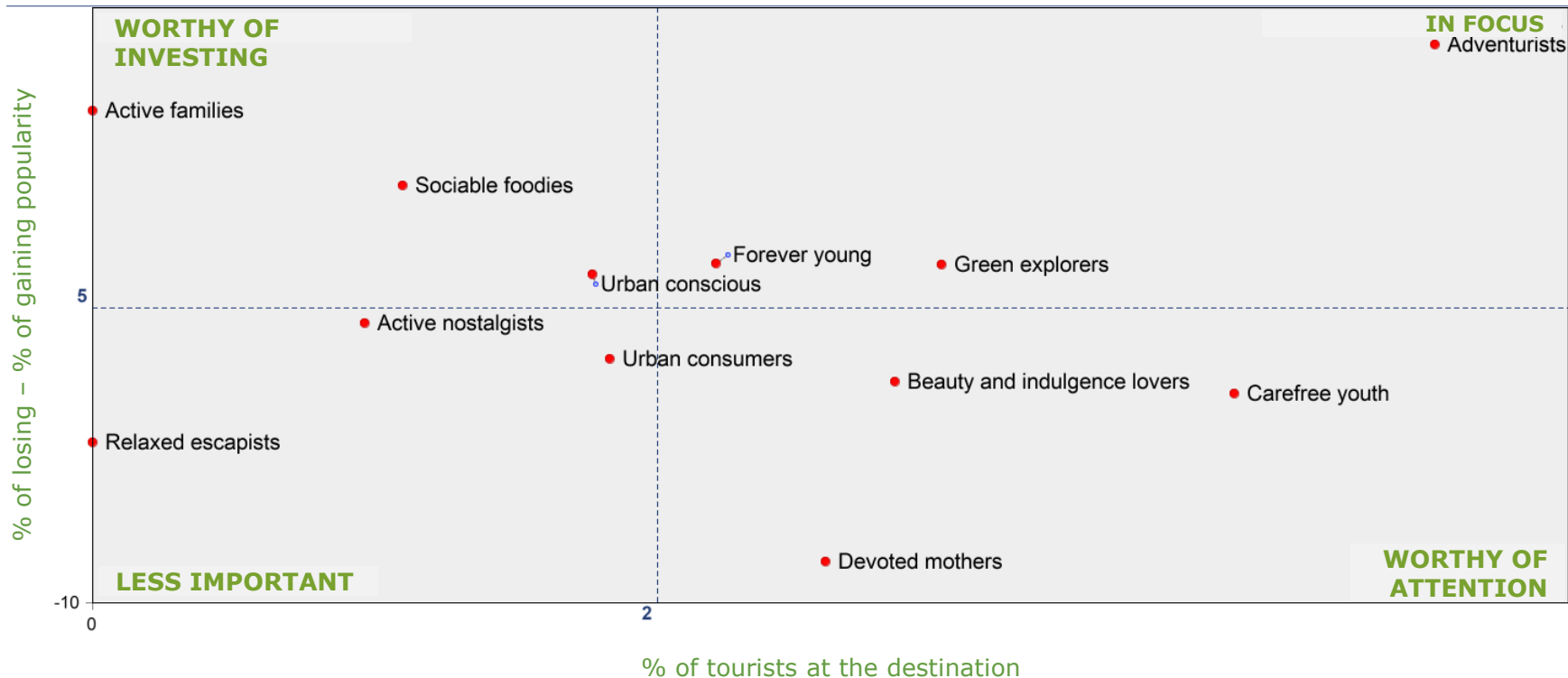


**NOTES:**

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).

# FRANCE: Slovenia's relevance

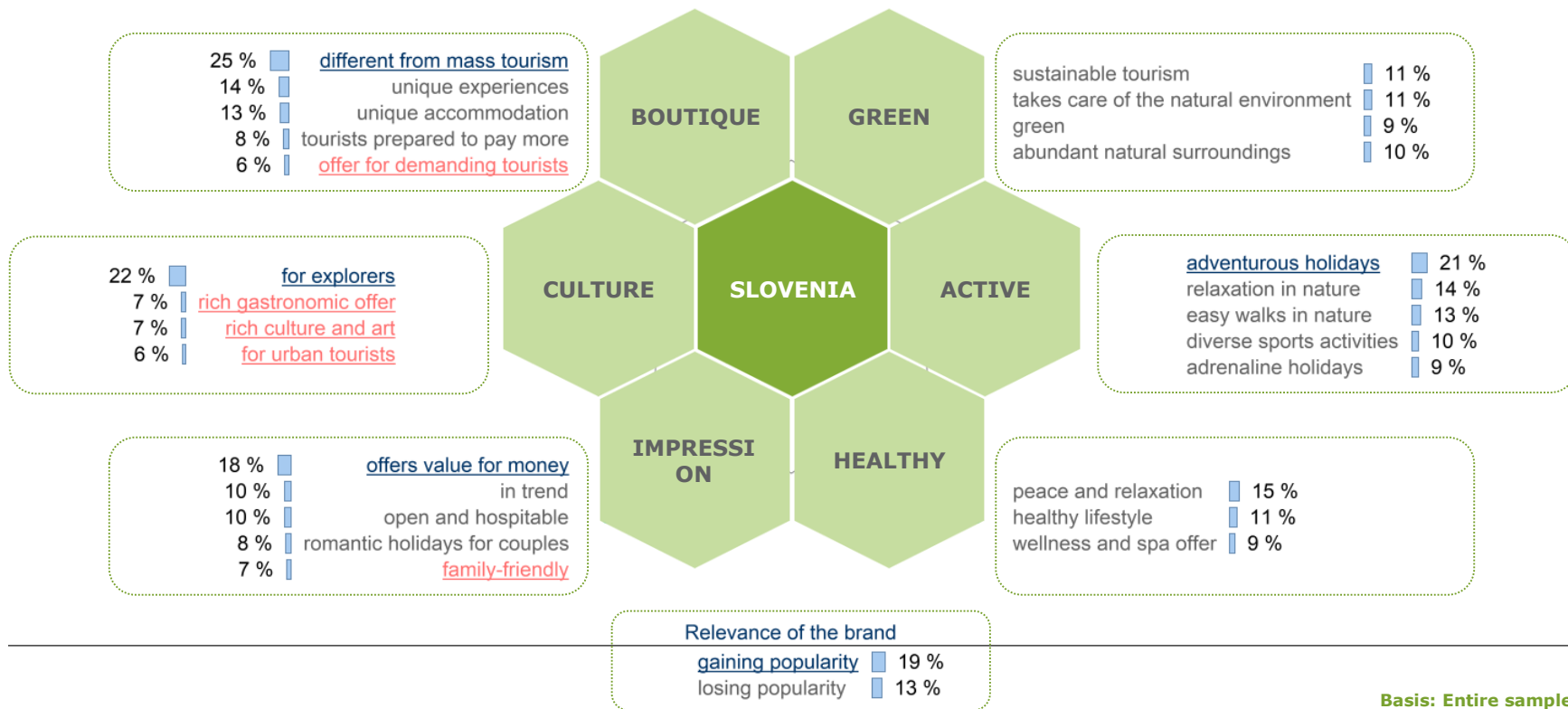
Slovenia's relevance as a tourist destination according to the popularity by segments of tourists



**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).

# FRANCE: Slovenia's image



Basis: Entire sample

## NOTES:

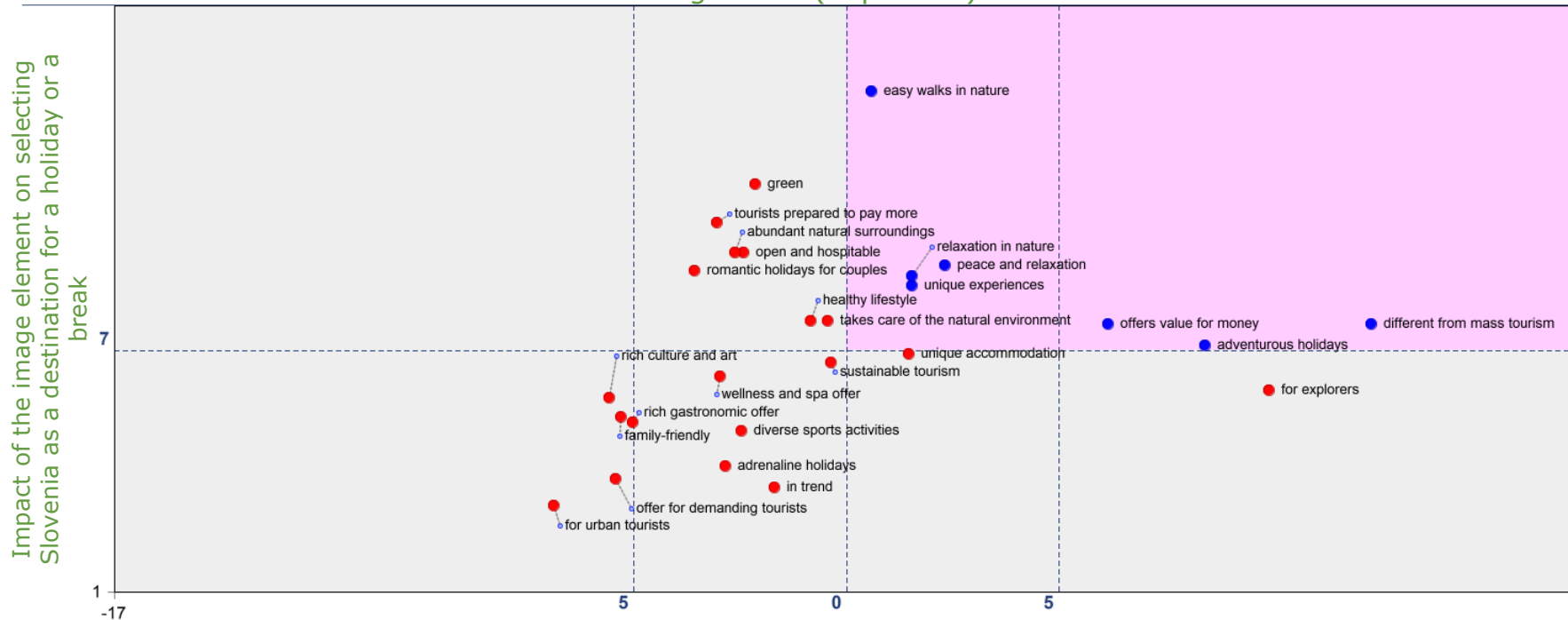
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

# FRANCE: Significance of elements

Impact of elements on selecting Slovenia as a destination for a holiday or a break

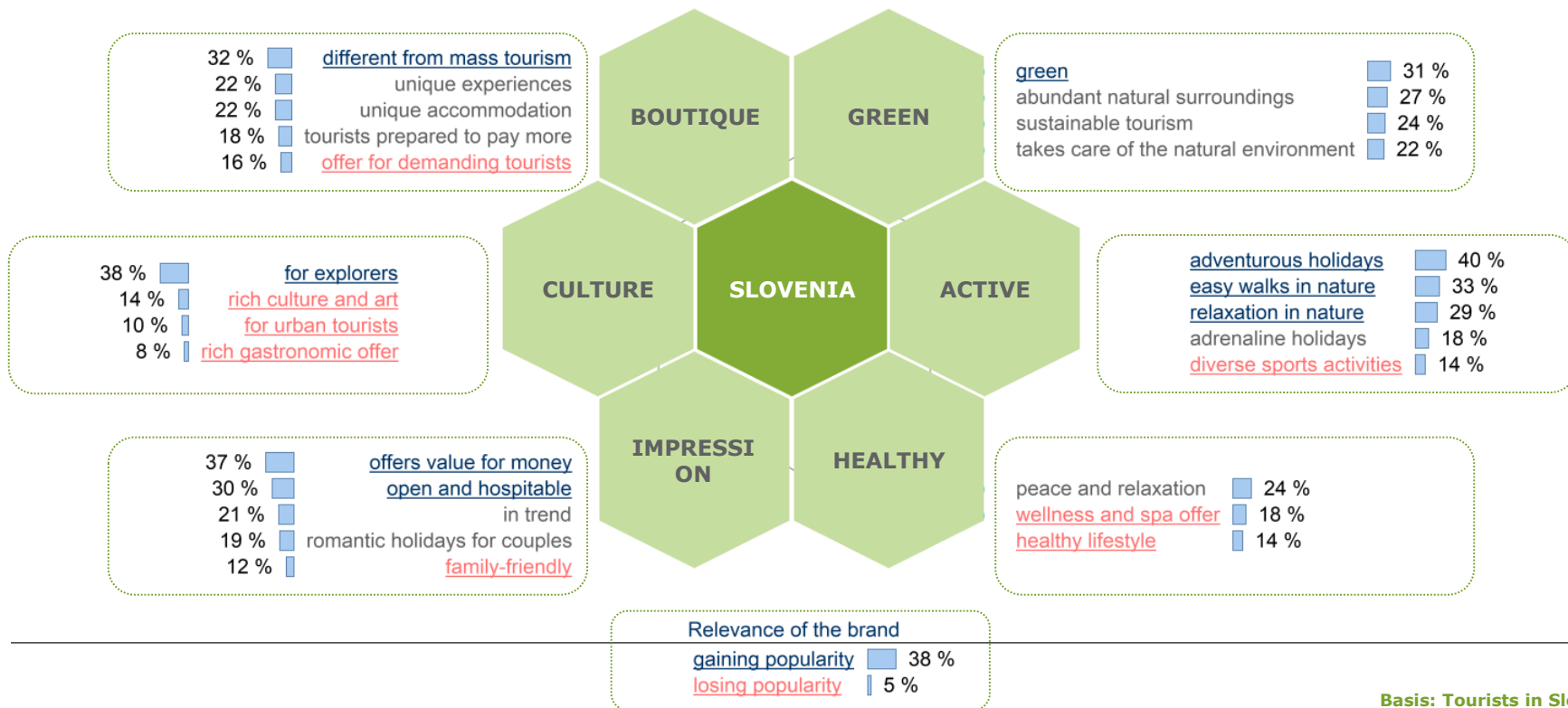


interesting elements are in the upper section of the image (influential), the best ones are on the right side (important)



## 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.



**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.

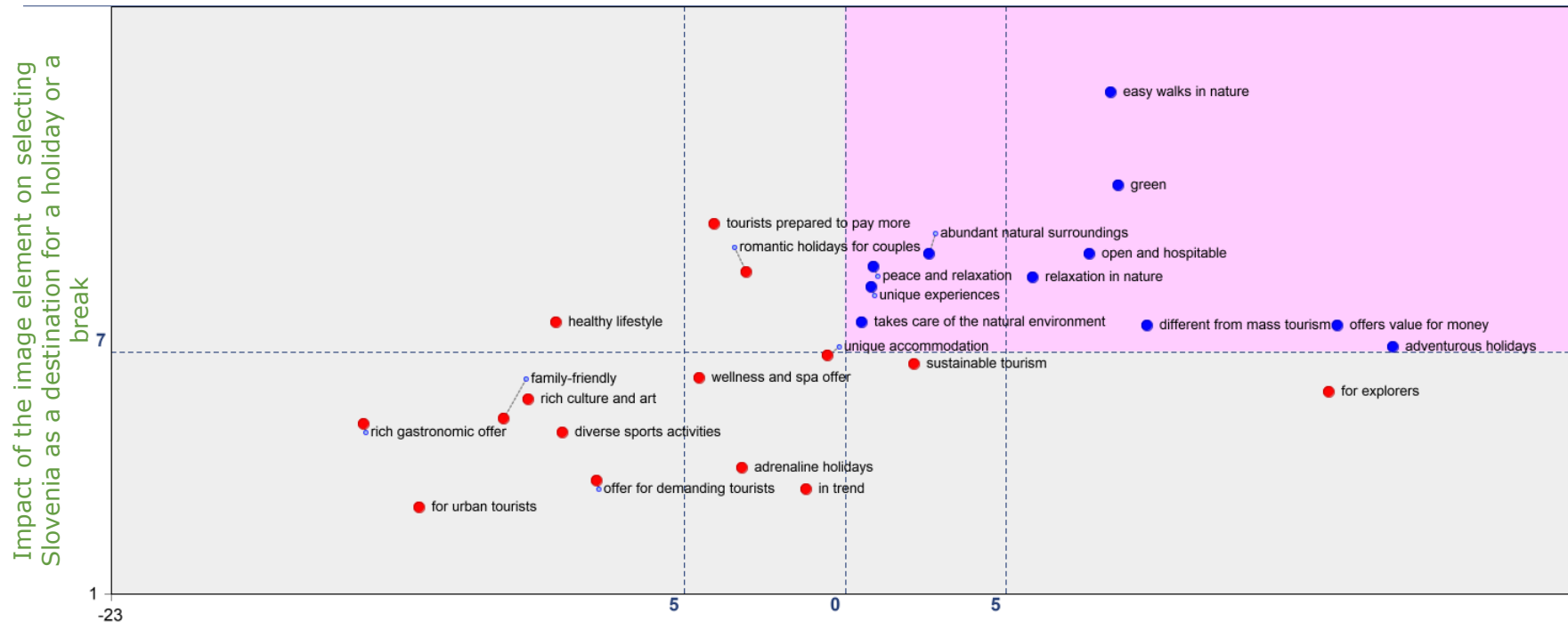
\*Slovenia is also among the destinations to which tourists travel with the purpose of enjoying a trip, break, or holiday.

# FRANCE: 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.

# FRANCE: Slovenia's image

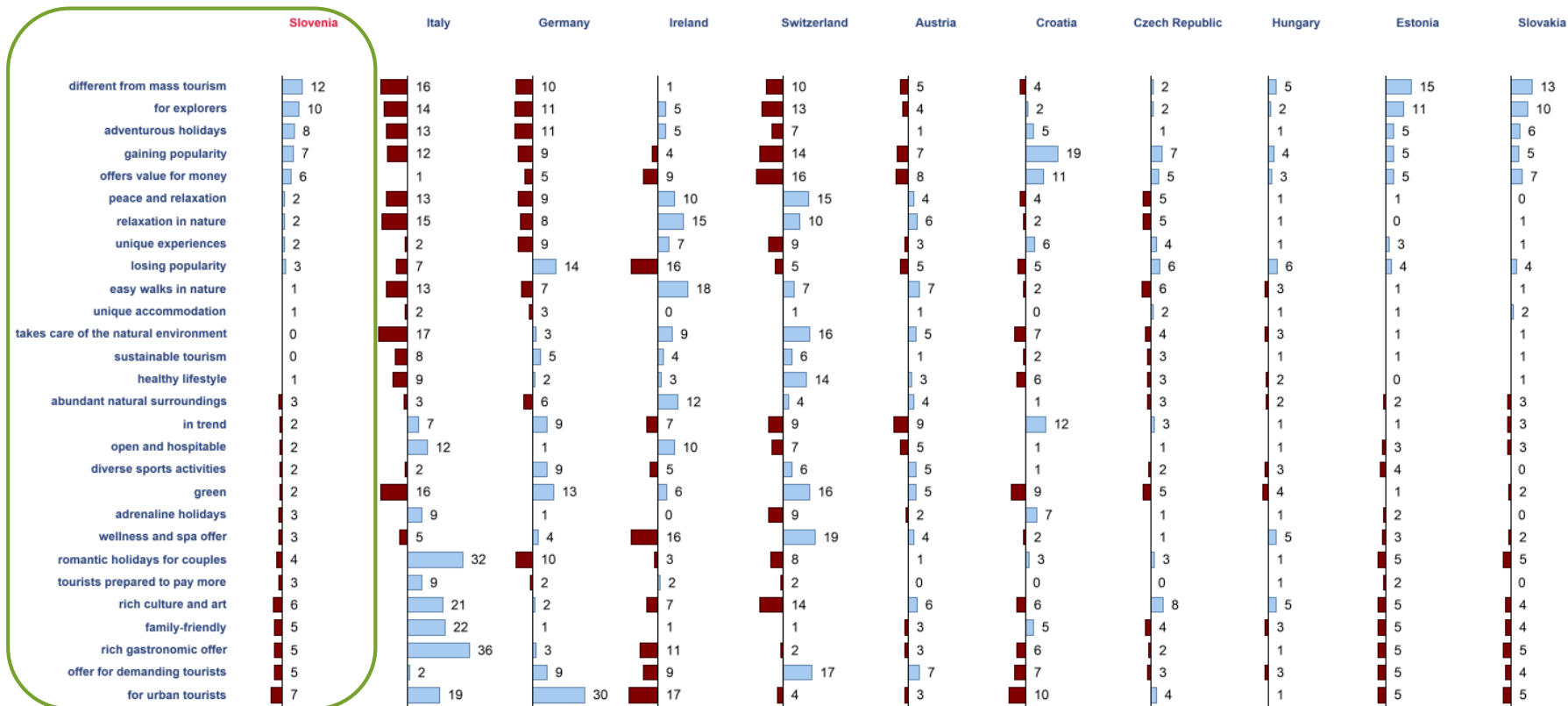


**NOTES:**

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.



# FRANCE: Typical elements of Slovenia



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**

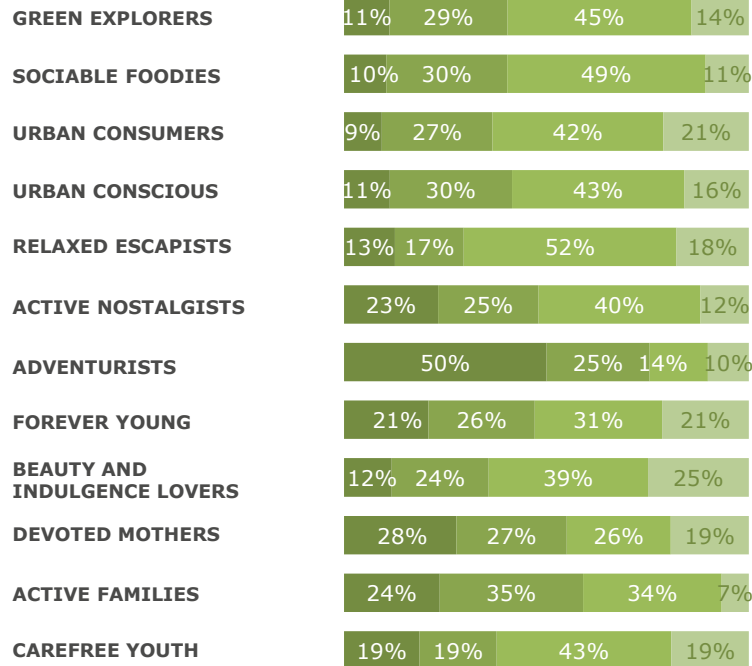


# FRANCE: Knowledge of, and experience with, Slovenia

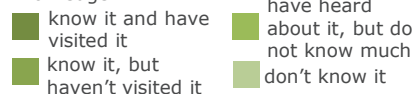


## KNOWLEDGE OF SLOVENIA

Basis: sample

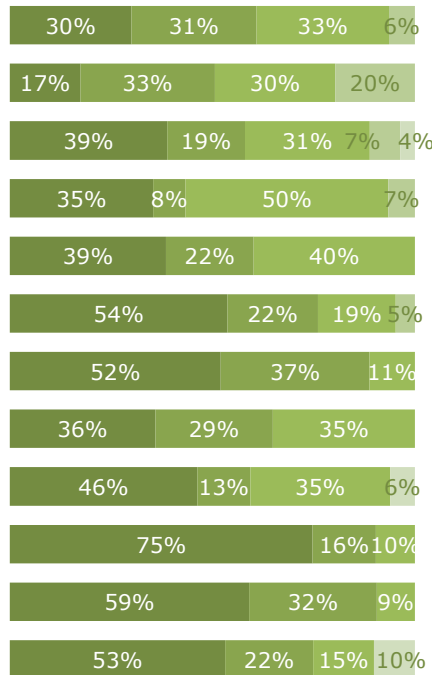


Knowledge:



## SATISFACTION

Basis: visitors to Slovenia

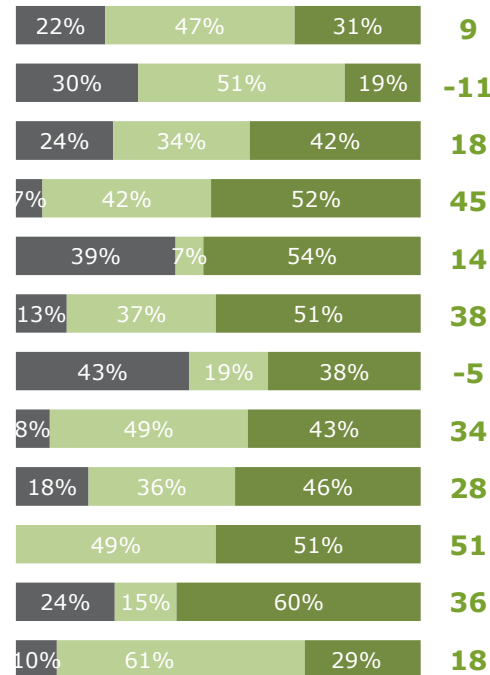


Meeting of expectations:



## NPS – DEGREE OF RECOMMENDATION

NPS Index



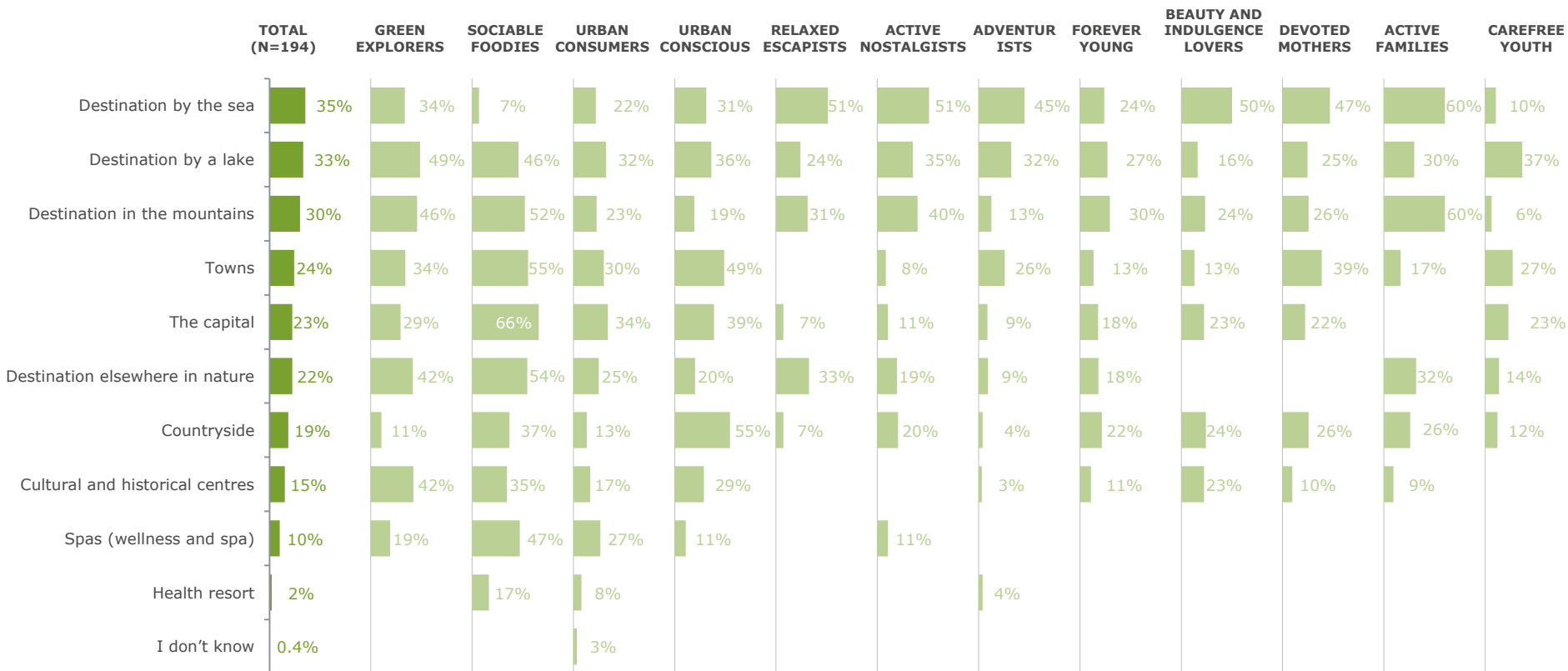
Recommendations:



**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.

## FRANCE: Destination type in Slovenia

Subsample: visitors to Slovenia

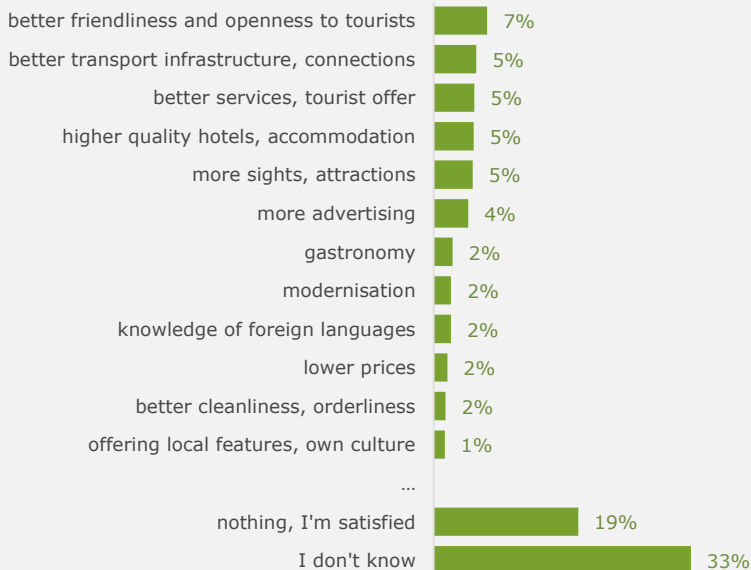


## NOTES:

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=131*

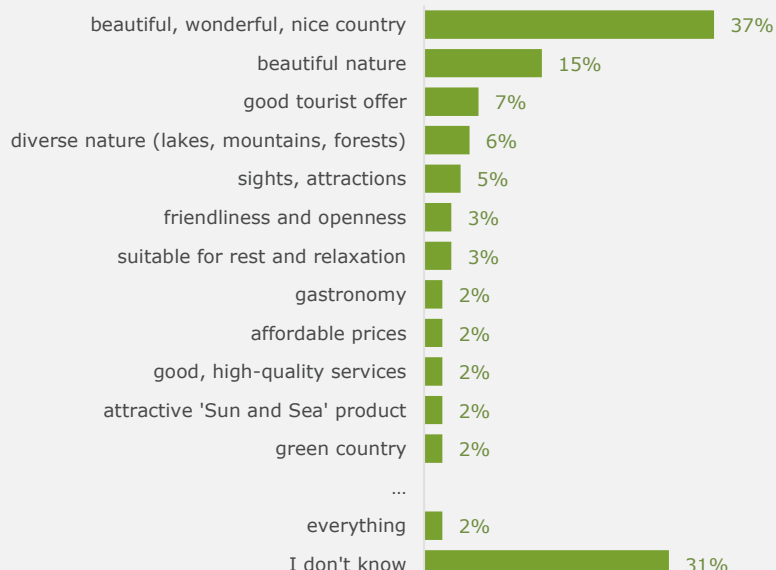


### NOTES:

OTHER STATEMENTS: ensure a more pleasant stay, attractiveness, I'm not familiar enough, preservation of safety, more information and information points, different social and political attitude, it is too far

## Elements of excitement – Top 12

*Promoters (would recommend Slovenia ), n=91*

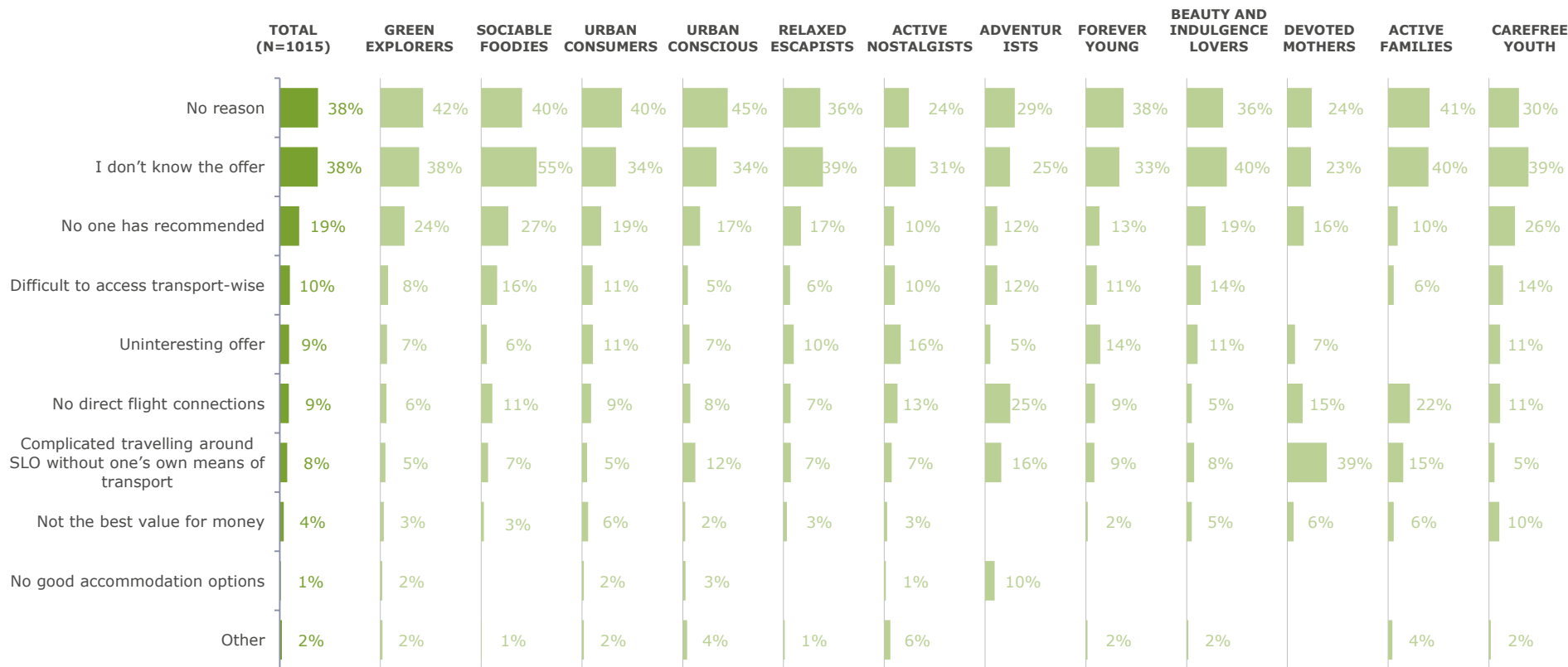


### NOTES:

OTHER STATEMENTS: not crowded, no mass tourism, proximity, location, easy communication

## FRANCE: 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	Entire population*	Population aged between 18 and 65*
<b>Austria</b>	8,690,100	5,574,356
<b>France</b>	66,760,000	39,372,128
<b>Italy</b>	60,665,600	37,287,764
<b>Germany</b>	82,175,700	51,549,829
<b>Netherlands</b>	16,979,100	10,477,231
<b>Poland</b>	37,967,200	25,060,599
<b>Russia</b>	143,973,300	97,436,838
<b>UK</b>	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**

## FRANCE: Green explorers (17.4%)



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	73%	+30
Nature		

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

TYPE OF  
ACCOMMODATION

Apartment	66%	+23
Hotel		

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

TRANSPORT TO THE  
DESTINATION

Aeroplane	79%	+9
Train		

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

TRANSPORT AT THE  
DESTINATION

Coach	43%	+10
Train		

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

## ACTIVITIES

Sightseeing of old town centres	79%	+23
Natural sightseeing	74%	+24

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

## MOTIVATION

Recommendations from friends	56%	+12
Price of the destination	44%	+5

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

## SOURCE OF INFORMATION

Friends, family	58%	+6
Articles on the Internet	49%	+8

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

## RESERVATION METHOD

Booking.com	58%	+7
Airbnb	42%	+12
Expedia	22%	+1

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

## TRAVELLING WITH

Family	26%	+2
Friends	13%	+2
As a couple	54%	+0
Relatives	2%	+0

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

## CHARACTERISTICS:

Size*	6,729,081
Share*	10%
Age	40
Women	40%

Spring	40%
Summer	44%
Shorter trips	2
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.

## FRANCE: 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	38,772,81		41%
Proportion	58%	The data are calculated as per the size of the country's entire population.	46%
Age	40		2
Women	45%	Longer trips	2

## TRAVELLING WITH:

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

Alone	8%
Relatives	2%

## DESTINATION TYPE:

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

Cult. and hist....	12%	30%	42%
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4x

Frequency of travelling abroad irrespective of the length

## ACTIVITIES – TOP 10:

Sightseeing in capital 64%

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

Sun and sea	49%
Tourist attractions	42%
History and castles	40%
Gastronomic pleasures	38%
Museums, galleries, art	34%
Shopping	33%

## TRAVEL MOTIVES:

Top 10 – 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)

Retreat from everyday life	8%	29%
Spend time with partner	6%	23%
Relaxation	6%	20%
Enjoy good food, drinks	2%	20%
Spend time with family, strengthen bonds	4%	14%
Rest, slow down the pace of life	4%	13%

## VISITING COUNTRIES:

Top 10 – 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)

Belgium	14%	24%
Greece	18%	24%
Germany	14%	23%
Netherlands	10%	17%
Switzerland	8%	16%
Slovenia	1%	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 they have visited so far and would visit again (Top 10, compared with Slovenia).

# FRANCE: 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



70



To the destination



At the destination (33% COACH, 28% ON FOOT, 6% BICYCLE)

TRAIN MOTORHOME MOTORCYCLE



1

5

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?

## PRICE SENSITIVITY:

Accommodation 74% 4%

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

Additional

Food 14% 66% 20%

Shopping 22% 63% 16%

Most favourable price Value for money Price is irrelevant

## 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)

Experience 38%

Travel literature 35%

Agency 22%

Articles - the Internet 31%

Travel lectures 24%

Expedia.com 22%

Travel lectures 30%

Tourist portals 24%

Accommodation providers 15%

## 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.



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