



IDENTIFICATION OF MARKET POTENTIAL

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

POLAND

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.



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



2017 TOP 50
INNOVATIVE
COMPANY

RESEARCH NOW
RANKED #6

METHODOLOGY



Methodological framework of the survey



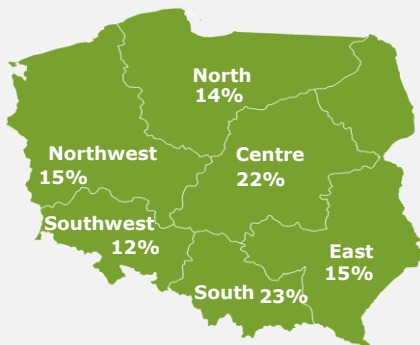
Method of implementation	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
Country of implementation	Poland
Implementation period	27 November – 03 December 2017
Target group	Citizens of a certain country, who <u>travel abroad at least once a year for a break, holiday, or a trip and spend at least two nights there.</u>
Sample	Entire sample: n=3,228 Target group: n=1,528 Visitors to Slovenia: n=420 Tourists in Slovenia: n=55
Representativeness	A target person was selected from the sample framework, which was representative of the population aged between 18 and 65. The data were weighted according to gender, age and region.
Survey length	Average duration of the survey: t=20:38.



POLAND: Sample demographics



REGIONS:



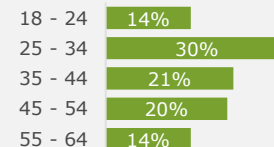
DETAILED DEFINITION OF REGIONS:

North: Kujawsko-Pomorskie, Pomorskie, Warmińsko-Mazurskie. **Northwest:** Lubuskie, Wielkopolskie, Zachodnio-Pomorskie. **Centre:** Łódzkie, Mazowieckie. **East:** Lubelskie, Odkarpackie, Podlaskie, Świętokrzyskie. **South:** Małopolskie, Śląskie. **Southwest:** Dolnośląskie, Opolskie.

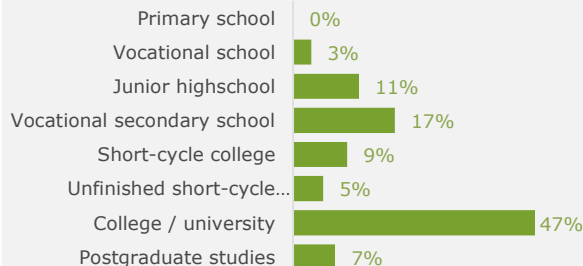
GENDER:



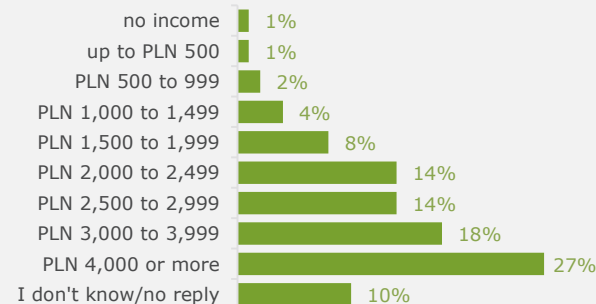
AGE:



EDUCATION:



PERSONAL INCOME:





Sample shares and sizes



Bordered ellipses show the basis for share calculations.



Basis: POLAND 18-65-year-olds	
POPULATION (18-65 YEARS)	100.0%
TARGET GROUP	47.5%
VISITORS TO SLOVENIA	13.0%
TOURISTS IN SLOVENIA	1.7%

Basis: TARGET GROUP	
POPULATION (18-65 YEARS)	/
TARGET GROUP	100.0%
VISITORS TO SLOVENIA	27.0%
TOURISTS IN SLOVENIA	3.6%

Absolute size*	
	25,060,599
	11,898,743
	3,258,119
	424,321

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

MARKET STRUCTURE AND SIZE (PERSONAS)



POLAND: Size of the potential



Top choice

0,3%

**NARROW
POTENTIAL**
Top choice +
repeated visit

2%

5%

**BROAD
POTENTIAL**
Choice

7%

18%

Visit or choice

9%

9%

POL

n=1549

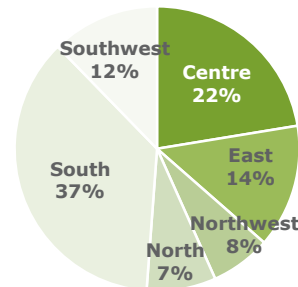
NARROW POTENTIAL:

2%

Tourists whose first choice for a tourist visit would be Slovenia (narrow interest – top choice) OR those who have already been to Slovenia and would visit it again

	Size*
Total in TG:	192,145
Centre	43,064
East	26,980
North	13,164
Northwest	15,130
South	70,213
Southwest	23,594

REGIONAL CLASSIFICATION:



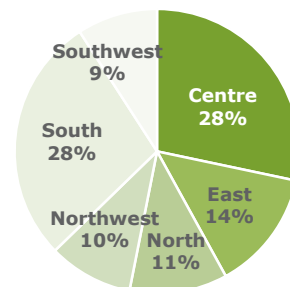
BROAD POTENTIAL:

7%

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:	806,356
Centre	228,263
East	110,294
North	89,742
Northwest	77,510
South	226,905
Southwest	73,643

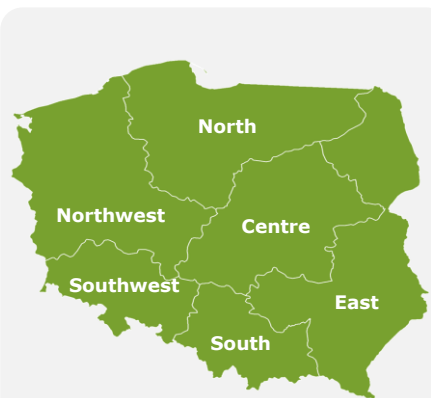
REGIONAL CLASSIFICATION:



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.

POLAND: Size of segments by regions



FOREVER YOUNG

15.1%

1,801,146



GREEN EXPLORERS:

15.0%

1,780,315

BEAUTY AND
INDULGENCE LOVERS:

14.9%

1,773,865

		Total	Centre	East	North	Northwest	South	Southwest
	%	100.0%	21.6%	15.4%	13.7%	15.1%	22.6%	11.5%
	Size	11,898,743	2,570,625	1,833,474	1,633,069	1,802,074	2,689,679	1,369,824
GREEN EXPLORERS	%	15.0%	20.8%	14.1%	13.2%	18.2%	23.4%	10.3%
	Size	1,780,315	370,277	251,674	235,492	323,188	416,776	182,907
SOCIABLE FOODIES	%	6.9%	26.5%	11.6%	10.0%	20.6%	19.8%	11.4%
	Size	816,344	216,565	94,640	82,025	168,346	161,827	92,941
URBAN CONSUMERS	%	10.0%	22.6%	17.3%	18.9%	11.4%	17.8%	12.0%
	Size	1,186,833	268,730	204,885	224,169	135,437	211,540	142,072
URBAN CONSCIOUS	%	7.9%	21.2%	14.1%	18.9%	14.6%	23.1%	8.1%
	Size	943,679	200,503	132,942	178,483	137,882	217,777	76,092
RELAXED ESCAPISTS	%	6.5%	17.9%	12.9%	18.6%	12.4%	29.6%	8.5%
	Size	773,495	138,654	99,934	144,023	96,232	229,012	65,640
ACTIVE NOSTALGISTS	%	6.6%	21.8%	19.0%	7.4%	15.1%	26.3%	10.4%
	Size	781,953	170,534	148,688	57,534	118,005	205,545	81,647
ADVENTURISTS	%	4.7%	21.2%	17.3%	15.4%	9.6%	26.7%	9.7%
	Size	564,459	119,556	97,715	87,093	54,168	150,893	55,034
FOREVER YOUNG	%	15.1%	24.7%	15.4%	12.7%	13.0%	21.6%	12.6%
	Size	1,801,146	445,706	277,848	227,998	234,045	388,969	226,580
BEAUTY AND INDULGENCE LOVERS	%	14.9%	16.6%	17.6%	13.7%	14.5%	23.1%	14.4%
	Size	1,773,865	294,149	312,862	243,575	257,467	410,479	255,333
DEVOTED MOTHERS	%	4.0%	19.8%	18.1%	8.4%	21.1%	19.2%	13.4%
	Size	478,371	94,758	86,606	40,158	100,901	92,020	63,927
ACTIVE FAMILIES	%	4.8%	28.3%	11.0%	9.0%	15.4%	24.0%	12.4%
	Size	569,353	160,994	62,514	51,182	87,446	136,526	70,691
CAREFREE YOUTH	%	3.6%	20.8%	14.5%	14.7%	20.5%	16.5%	13.1%
	Size	428,929	89,010	62,361	62,918	88,081	70,579	55,981

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	70%
In the mountains	46%
Cities	37%
Elsewhere in nature	36%
By a lake	33%

TYPE OF ACCOMMODATION

Hotel	76%
Apartment	43%
Hostel	36%
Staying with relatives or friends	30%
Tourist farm	30%

TRANSPORT TO THE DESTINATION

Aeroplane	60%
Car	29%
Coach	6%
Motorhome (camper)	2%
Train	1%

TRANSPORT AT THE DESTINATION

Car	69%
Coach	40%
On foot	20%
Train	18%
Bicycle	7%

ACTIVITIES

Sun and sea	58%
Sightseeing of old town centres	57%
Recreation	57%
Sightseeing of a town, the capital	53%
History and castles	51%

MOTIVATION

Past experience	48%
Recommendations from friends	45%
Price of the destination	39%
Articles on the Internet	38%
Travel literature	22%

SOURCE OF INFORMATION

Articles on the Internet	54%
Friends, family	52%
Web forums	32%
Blogs	30%
Travel literature	26%

RESERVATION METHOD

Booking.com	48%
Agency	40%
Directly at the accommodation provider	22%
Own accommodation	17%
Through official TICs	12%

TRAVELLING WITH

As a couple	49%
Family	34%
Friends	14%
Alone	3%
Relatives	0%

CHARACTERISTICS:

Size*	11,898,743
Share*	47%
Age	39
Women	49%

Summer	72%
Autumn	14%
Shorter trips	2
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.

POLAND: Tourists in Slovenia (3.6%)



DESTINATION TYPE

Elsewhere in nature	47%	+11
Cultural and historical centres	40%	+11
Spas (wellness and spa)	29%	+11
By a lake	40%	+7
In the mountains	52%	+5

TYPE OF ACCOMMODATION

Apartment	56%	+13
Hostel	46%	+10
Tourist farm	41%	+11
Hotel	78%	+2
Camper	11%	+6

TRANSPORT TO THE DESTINATION

Car	46%	+17
Motorcycle	3%	+2
Coach	5%	-2
Aeroplane	46%	-15
Motorhome (camper)	1%	-1

TRANSPORT AT THE DESTINATION

Car	71%	+1
Motorcycle	17%	+13
Coach	39%	-1
Motorhome (camper)	9%	+5
Train	16%	-1

ACTIVITIES

Natural sights, nature	63%	+15
Learning about the local way of life	53%	+18
Gastronomy	48%	+19
Social events, festivals	43%	+19
Seeing major tourist attractions	60%	+14

MOTIVATION

Travel literature	40%	+17
Past experience	67%	+19
Popularity of the destination	34%	+15
Posts on social media, blogs	29%	+12
Articles in print media	27%	+11

SOURCE OF INFORMATION

Travel literature	44%	+18
Articles on the Internet	60%	+6
Travel presentations	37%	+22
Web forums	42%	+11
Articles in print media	29%	+10

RESERVATION METHOD

Directly at the accommodation provider	42%	+20
Through official TICs	22%	+10
Organiser	21%	+10
Airbnb	20%	+9
Booking.com	40%	-7

TRAVELLING WITH

As a couple	53%	+4
Family	33%	-1
Friends	13%	-2
Alone	2%	-2

CHARACTERISTICS:

Size*	424,321
Share*	2%
Age	45
Women	39%

Spring	62%
Summer	17%
Shorter trips	2
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.

POLAND: Forever young (15.1%)



DESTINATION TYPE

By the sea	64%	-6
Cultural and historical centres	24%	-5
Countryside	17%	+1
Elsewhere in nature	26%	-9
In the mountains	30%	-16

TYPE OF ACCOMMODATION

Hotel	80%	+3
Tourist farm	30%	+0
Hostel	31%	-4
Staying with relatives or friends	27%	-3
Boutique hotel	15%	-1

TRANSPORT TO THE DESTINATION

Aeroplane	62%	+2
Coach	7%	+1
Car	27%	-2
Motorhome (camper)	1%	+0
Ship or another vessel	1%	+0

TRANSPORT AT THE DESTINATION

Coach	44%	+5
Car	67%	-2
Train	19%	+1
Motorcycle	2%	-2
On foot	11%	-9

ACTIVITIES

<u>Sightseeing of old town centres</u>	75%	+18
<u>History and castles</u>	69%	+17
<u>Sightseeing of a town, the capital</u>	61%	+8
<u>Seeing major tourist attractions</u>	52%	+6
<u>Touring</u>	28%	+12

MOTIVATION

Past experience	51%	+3
Recommendations from friends	44%	-1
Articles on the Internet	40%	+2
Price of the destination	37%	-2
Posts on social media, blogs	15%	-2

SOURCE OF INFORMATION

Friends, family	52%	+0
Articles on the Internet	54%	+0
Articles in print media	20%	+1
Opinions in social media	19%	+2
Web forums	31%	-1

RESERVATION METHOD

Agency	45%	+5
Organiser	11%	-1
Directly at the accommodation provider	21%	-2
Own accommodation	14%	-3
Expedia.com	6%	+0

TRAVELLING WITH

Family	38%	+4
As a couple	47%	-1
Alone	4%	+1
Friends	10%	-4
Relatives	0%	+0

CHARACTERISTICS:

Size*	1,801,146
Share*	7%
Age	41
Women	47%

Summer	72%
Autumn	12%
Shorter trips	2
Longer trips	1

POLAND: Green explorers (15.0%)



DESTINATION TYPE

In the mountains	72%	+26
Cultural and historical centres	59%	+30
Cities	60%	+23
By the sea	84%	+15
Capitals	47%	+25

TYPE OF ACCOMMODATION

Apartment	67%	+24
Hostel	42%	+6
Private accommodation (e.g. Airbnb)	38%	+11
Staying with relatives or friends	33%	+4
Tourist farm	32%	+2

TRANSPORT TO THE DESTINATION

Aeroplane	60%	+0
Car	29%	+0
Coach	8%	+2
Train	1%	-1
Motorcycle	1%	+0

TRANSPORT AT THE DESTINATION

Coach	51%	+11
On foot	30%	+11
Car	70%	+0
Train	25%	+8
Motorcycle	4%	+0

ACTIVITIES

Sightseeing of old town centres	84%	+27
Sightseeing of a town, the capital	78%	+25
Natural sights, nature	74%	+26
Recreation	68%	+11
Sports activities	48%	+19

MOTIVATION

Price of the destination	51%	+13
Articles in print media	27%	+10
Past experience	53%	+5
Travel literature	28%	+5
Popularity of the destination	25%	+6

SOURCE OF INFORMATION

Articles on the Internet	61%	+7
Travel literature	36%	+10
Web forums	37%	+5
Blogs	36%	+6
Web portals (TripAdvisor etc.)	33%	+8

RESERVATION METHOD

Booking.com	60%	+12
Directly at the accommodation provider	30%	+7
Own accommodation	20%	+3
Airbnb	15%	+4
Through official TICs	14%	+2

TRAVELLING WITH

As a couple	48%	-1
Family	36%	+2
Alone	4%	+1
Friends	12%	-3

CHARACTERISTICS:

Size*	1,780,315
Share*	7%
Age	39
Women	47%

Summer	70%
Autumn	15%
Shorter trips	2
Longer trips	1

NOTES:

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

POLAND: Beauty and indulgence lovers (14.9%)



DESTINATION TYPE

By the sea	94%	+24
<u>Spas (wellness and spa)</u>	43%	+24
In the mountains	43%	-3
By a lake	26%	-8
Elsewhere in nature	23%	-13

TYPE OF
ACCOMMODATION

Hotel	85%	+8
Apartment	45%	+2
Staying with relatives or friends	30%	+0
Private accommodation (e.g. Airbnb)	28%	+1
Own property (holiday cottage)	3%	+0

TRANSPORT TO THE
DESTINATION

<u>Aeroplane</u>	66%	+6
Car	30%	+1
Coach	4%	-3
Train	0%	-1
Motorhome (camper)	0%	-1

TRANSPORT AT THE
DESTINATION

Car	79%	+10
On foot	16%	-4
Bicycle	5%	-2
Coach	30%	-9
Motorhome (camper)	1%	-3

ACTIVITIES

Sun and sea	80%	+21
Wellness and spa	39%	+20
Recreation	70%	+13
Shopping	43%	+16
Aquafun, amusement parks	40%	+12

MOTIVATION

<u>Recommendations from friends</u>	48%	+3
Price of the destination	41%	+2
Popularity of the destination	20%	+2
Past experience	48%	+0
Videos on the Internet	17%	+0

SOURCE OF
INFORMATION

Friends, family	55%	+3
<u>Web forums</u>	35%	+4
<u>Web portals (TripAdvisor etc.)</u>	29%	+4
<u>Agencies</u>	20%	+4
Articles on the Internet	52%	-3

RESERVATION METHOD

<u>Agency</u>	47%	+7
Booking.com	46%	-2
<u>Own accommodation</u>	20%	+3
Other web portal	6%	+2
Organiser	9%	-2

TRAVELLING WITH

<u>Family</u>	50%	+16
As a couple	43%	-5
Friends	6%	-8
Alone	0%	-3

CHARACTERISTICS:

Size*	1,773,865
Share*	7%
Age	39
Women	58%

Summer	79%
Autumn	12%
Shorter trips	1
Longer trips	1

POLAND: Urban consumers (10.0%)



DESTINATION TYPE

<u>Cities</u>	65%	+28
Capitals	21%	-2
By the sea	61%	-8
By a lake	21%	-12
Countryside	14%	-3

TYPE OF
ACCOMMODATION

<u>Hotel</u>	88%	+11
Staying with relatives or friends	30%	+0
Apartment	37%	-6
Own property (holiday cottage)	5%	+2
Camp	15%	-4

TRANSPORT TO THE
DESTINATION

Aeroplane	63%	+3
<u>Train</u>	6%	+4
Motorhome (camper)	2%	+0
Coach	5%	-1
Car	23%	-6

TRANSPORT AT THE
DESTINATION

Car	70%	+0
Train	19%	+1
Coach	39%	-1
Motorhome (camper)	5%	+1
Bicycle	7%	+0

ACTIVITIES

Shopping	57%	+30
<u>Sightseeing of a town, the capital</u>	65%	+11
<u>Nightlife (bars, clubs)</u>	39%	+22
<u>Seeing major tourist attractions</u>	51%	+5
Gastronomy	39%	+9

MOTIVATION

<u>Recommendations from friends</u>	49%	+4
<u>TV programmes</u>	21%	+4
Articles on the Internet	40%	+2
Past experience	47%	-1
Videos on the Internet	17%	+1

SOURCE OF
INFORMATION

Friends, family	54%	+2
Web forums	35%	+3
Articles on the Internet	54%	-1
Blogs	32%	+1
Agencies	18%	+2

RESERVATION METHOD

Agency	42%	+2
Booking.com	46%	-1
Airbnb	12%	+1
Own accommodation	15%	-2
At the activity provider	8%	+0

TRAVELLING WITH

<u>As a couple</u>	53%	+4
<u>Alone</u>	5%	+1
<u>Friends</u>	17%	+3
Family	26%	-8

CHARACTERISTICS:

Size*	1,186,833
Share*	5%
Age	35
Women	57%

Summer	70%
Autumn	15%
Shorter trips	2
Longer trips	1

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POLAND: Urban conscious (7.9%)



DESTINATION TYPE

Cities	62%	+25
Capitals	50%	+28
Cultural and historical centres	44%	+15
In the mountains	34%	-12
By the sea	51%	-19

TYPE OF ACCOMMODATION

Hostel	72%	+36
Staying with relatives or friends	38%	+8
Private accommodation (e.g. Airbnb)	37%	+10
Tourist farm	35%	+5
Camp	25%	+6

TRANSPORT TO THE DESTINATION

Aeroplane	61%	+1
Coach	14%	+8
Train	2%	+1
Car	21%	-8
Motorhome (camper)	1%	-1

TRANSPORT AT THE DESTINATION

Coach	55%	+15
Train	34%	+16
On foot	32%	+12
Car	58%	-12
Bicycle	8%	+1

ACTIVITIES

Museums, galleries and art	72%	+37
Sightseeing of old town centres	82%	+25
Learning about the local way of life	66%	+32
Music festivals and concerts	57%	+35
Recreation	71%	+14

MOTIVATION

Price of the destination	49%	+11
Popularity of the destination	26%	+7
Travel literature	29%	+7
Suitability of the destination in all seasons	19%	+8
Articles on the Internet	43%	+5

SOURCE OF INFORMATION

Blogs	46%	+15
Articles on the Internet	61%	+7
Travel literature	34%	+8
Web portals (TripAdvisor etc.)	32%	+6
Articles in print media	25%	+6

RESERVATION METHOD

Booking.com	61%	+13
Directly at the accommodation provider	26%	+4
Airbnb	18%	+7
Own accommodation	19%	+3
Agency	33%	-7

TRAVELLING WITH

As a couple	50%	+2
Friends	28%	+13
Alone	3%	+0
Family	19%	-15

CHARACTERISTICS:

Size*	943,679
Share*	4%
Age	39
Women	63%

Summer	65%
Autumn	18%
Shorter trips	2
Longer trips	1

POLAND: Sociable foodies (6.9%)



DESTINATION TYPE

Cultural and historical centres	<u>72%</u>	<u>+43</u>
By the sea	<u>89%</u>	<u>+19</u>
Elsewhere in nature	<u>55%</u>	<u>+20</u>
Capitals	<u>44%</u>	<u>+22</u>
Cities	<u>52%</u>	<u>+15</u>

TYPE OF ACCOMMODATION

Tourist farm	<u>44%</u>	<u>+14</u>
Hotel	<u>89%</u>	<u>+13</u>
Private accommodation (e.g. Airbnb)	<u>40%</u>	<u>+13</u>
Boutique hotel	<u>31%</u>	<u>+15</u>
Apartment	<u>43%</u>	<u>+0</u>

TRANSPORT TO THE DESTINATION

Aeroplane	<u>69%</u>	<u>+9</u>
Coach	<u>5%</u>	<u>-1</u>
Train	<u>1%</u>	<u>+0</u>
Motorcycle	<u>1%</u>	<u>+0</u>
Car	<u>24%</u>	<u>-5</u>

TRANSPORT AT THE DESTINATION

Coach	<u>51%</u>	<u>+12</u>
On foot	<u>29%</u>	<u>+9</u>
Car	<u>75%</u>	<u>+5</u>
Train	<u>23%</u>	<u>+5</u>
Bicycle	<u>13%</u>	<u>+6</u>

ACTIVITIES

Sightseeing of old town centres	<u>95%</u>	<u>+38</u>
History and castles	<u>91%</u>	<u>+40</u>
Seeing major tourist attractions	<u>88%</u>	<u>+42</u>
Natural sights, nature	<u>81%</u>	<u>+33</u>
Visit to a wine cellar	<u>55%</u>	<u>+35</u>

MOTIVATION

Price of the destination	<u>58%</u>	<u>+19</u>
Popularity of the destination	<u>34%</u>	<u>+15</u>
Past experience	<u>58%</u>	<u>+10</u>
Travel literature	<u>37%</u>	<u>+15</u>
Articles on the Internet	<u>50%</u>	<u>+12</u>

SOURCE OF INFORMATION

Web portals (TripAdvisor etc.)	<u>47%</u>	<u>+21</u>
Articles on the Internet	<u>71%</u>	<u>+16</u>
Friends, family	<u>64%</u>	<u>+12</u>
Articles in print media	<u>35%</u>	<u>+16</u>
Web forums	<u>39%</u>	<u>+8</u>

RESERVATION METHOD

Agency	<u>52%</u>	<u>+12</u>
Directly at the accommodation provider	<u>33%</u>	<u>+11</u>
Through official TICs	<u>24%</u>	<u>+13</u>
Booking.com	<u>54%</u>	<u>+6</u>
Own accommodation	<u>22%</u>	<u>+5</u>

TRAVELLING WITH

Family	<u>43%</u>	<u>+9</u>
As a couple	<u>53%</u>	<u>+4</u>
Relatives	<u>1%</u>	<u>+1</u>
Friends	<u>3%</u>	<u>-11</u>

CHARACTERISTICS:

Size*	816,344
Share*	3%
Age	41
Women	59%

Summer	71%
Autumn	17%
Shorter trips	2
Longer trips	1

POLAND: Active nostalgists (6.6%)



DESTINATION TYPE

<u>In the mountains</u>	67%	+21
<u>By a lake</u>	56%	+23
<u>Elsewhere in nature</u>	55%	+19
By the sea	59%	-11
Countryside	19%	+3

TYPE OF
ACCOMMODATION

Hotel	83%	+7
<u>Boutique hotel</u>	34%	+18
Tourist farm	29%	+0
Hostel	31%	-5
Camper	6%	+1

TRANSPORT TO THE
DESTINATION

Car	36%	+7
<u>Motorcycle</u>	4%	+3
<u>Ship or another vessel</u>	3%	+3
Aeroplane	49%	-11
Motorhome (camper)	3%	+1

TRANSPORT AT THE
DESTINATION

Car	72%	+2
<u>Motorhome (camper)</u>	9%	+5
On foot	18%	-2
Coach	24%	-16
<u>Motorcycle</u>	6%	+2

ACTIVITIES

<u>Sports activities</u>	50%	+21
<u>Gastronomy</u>	42%	+13
<u>Visit to a wine cellar</u>	34%	+15
<u>Thermal health spas</u>	24%	+5
Wellness and spa	23%	+4

MOTIVATION

Recommendations from friends	48%	+3
<u>Travel literature</u>	27%	+4
Proximity of the destination	13%	+1
TV programmes	15%	-2
Articles on the Internet	32%	-6

SOURCE OF
INFORMATION

Travel presentations	22%	+8
Travel literature	24%	-2
Articles on the Internet	45%	-9
Articles in print media	18%	-1
Opinions in social media	17%	+0

RESERVATION METHOD

Booking.com	51%	+3
Agency	42%	+2
Organiser	14%	+2
<u>Agoda.com</u>	9%	+4
Directly at the accommodation provider	22%	+0

TRAVELLING WITH

<u>As a couple</u>	64%	+15
Friends	13%	-1
Alone	4%	+1
Family	19%	-15

CHARACTERISTICS:

Size*	781,953
Share*	3%
Age	37
Women	33%

Summer	66%
Autumn	13%
Shorter trips	2
Longer trips	1

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POLAND: Relaxed escapists (6.5%)



DESTINATION TYPE

Countryside	17%	+1
Cities	21%	-16
By a lake	20%	-13
In the mountains	28%	-19
Capitals	13%	-9

TYPE OF
ACCOMMODATION

Hotel	71%	-6
Camp	18%	-1
Tourist farm	23%	-6
Camper	6%	+1
Own property (holiday cottage)	3%	+0

TRANSPORT TO THE
DESTINATION

Aeroplane	63%	+3
Coach	8%	+2
Motorcycle	4%	+3
Motorhome (camper)	2%	+0
Car	23%	-6

TRANSPORT AT THE
DESTINATION

Motorcycle	7%	+3
Coach	30%	-9
Train	11%	-7
Car	56%	-14
Bicycle	7%	+0

ACTIVITIES

Natural sights, nature	51%	+3
Gastronomy	33%	+4
Thermal health spas	32%	+12
Selfness, digital- detox, etc.	20%	+14
Adrenaline sports challenges	14%	+5

MOTIVATION

Travel presentations	19%	+6
TV programmes	18%	+1
Articles on the Internet	30%	-8
Articles in print media	17%	+0
Web ads	10%	+3

SOURCE OF
INFORMATION

Opinions in social media	19%	+2
Friends, family	39%	-13
Blogs	24%	-6
Travel literature	22%	-4
Travel presentations	16%	+1

RESERVATION METHOD

<u>Through official TICs</u>	16%	+4
Expedia.com	15%	+9
Organiser	12%	+1
Agoda.com	10%	+5
Booking.com	30%	-18

TRAVELLING WITH

As a couple	51%	+2
Friends	18%	+4
Alone	6%	+3
Family	24%	-9

CHARACTERISTICS:

Size*	773,495
Share*	3%
Age	38
Women	49%

Summer	76%
Autumn	13%
Shorter trips	2
Longer trips	1

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POLAND: Active families (4.8%)



DESTINATION TYPE

In the mountains	76%	+29
Elsewhere in nature	59%	+23
By a lake	58%	+25
By the sea	66%	-3
Countryside	16%	+0

TYPE OF
ACCOMMODATION

Apartment	70%	+27
Camp	27%	+8
Hotel	73%	-3
Hostel	35%	-1
Tourist farm	32%	+2

TRANSPORT TO THE
DESTINATION

Car	38%	+9
Motorcycle	3%	+2
Train	2%	+0
Aeroplane	55%	-5
Motorhome (camper)	1%	-1

TRANSPORT AT THE
DESTINATION

Car	78%	+9
Bicycle	14%	+7
Coach	37%	-3
Motorcycle	8%	+4
On foot	15%	-4

ACTIVITIES

Sports activities	73%	+44
Water sports activities	71%	+41
Natural sights, nature	53%	+5
Touring	37%	+21
Winter sports	28%	+12

MOTIVATION

Articles on the Internet	49%	+11
Travel literature	33%	+11
Past experience	50%	+2
Recommendations from friends	44%	-1
Travel presentations	17%	+4

SOURCE OF
INFORMATION

Articles on the Internet	63%	+8
Blogs	31%	+1
Travel literature	27%	+1
Friends, family	48%	-4
Web forums	29%	-3

RESERVATION METHOD

Through official TICs	21%	+9
Booking.com	54%	+7
Directly at the accommodation provider	30%	+8
At the activity provider	14%	+6
Organiser	16%	+5

TRAVELLING WITH

As a couple	51%	+2
Family	35%	+1
Alone	3%	-1
Friends	12%	-3

CHARACTERISTICS:

Size*	569,353
Share*	2%
Age	40
Women	36%

Summer	82%
Autumn	14%
Shorter trips	2
Longer trips	2

POLAND: Adventurists (4.7%)



DESTINATION TYPE

<u>Elsewhere in nature</u>	58%	+23
In the mountains	49%	+2
<u>By a lake</u>	47%	+14
By the sea	49%	-21
Cultural and historical centres	15%	-14

TYPE OF
ACCOMMODATION

<u>Tourist farm</u>	38%	+8
Camp	26%	+7
<u>Glamping</u>	14%	+12
Hostel	32%	-4
<u>Camper</u>	14%	+9

TRANSPORT TO THE
DESTINATION

<u>Motorhome (camper)</u>	14%	+12
Car	29%	+0
<u>Motorcycle</u>	2%	+1
Aeroplane	48%	-12
Train	2%	+1

TRANSPORT AT THE
DESTINATION

<u>Motorhome (camper)</u>	11%	+7
Car	59%	-11
On foot	21%	+1
Coach	27%	-13
Train	12%	-6

ACTIVITIES

History and castles	77%	+26
<u>Adrenaline sports challenges</u>	39%	+31
<u>Water sports activities</u>	51%	+21
<u>Mountaineering (more challenging tours)</u>	21%	+15
Winter sports	20%	+3

MOTIVATION

<u>Travel literature</u>	36%	+13
Past experience	46%	-2
<u>Articles in print media</u>	21%	+5
Videos on the Internet	19%	+2
<u>TV ads</u>	13%	+5

SOURCE OF
INFORMATION

<u>Travel literature</u>	31%	+5
Articles in print media	23%	+4
Friends, family	45%	-7
Opinions in social media	17%	-1
Articles on the Internet	44%	-11

RESERVATION METHOD

Organiser	17%	+6
Directly at the accommodation provider	23%	+0
<u>Expedia.com</u>	14%	+8
At the activity provider	12%	+4
Booking.com	41%	-7

TRAVELLING WITH

<u>Friends</u>	25%	+10
As a couple	41%	-8
Family	30%	-4
Alone	5%	+2

CHARACTERISTICS:

Size*	564,459
Share*	2%
Age	37
Women	36%

Summer	69%
Autumn	14%
Shorter trips	3
Longer trips	1

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POLAND: Devoted mothers (4.0%)



DESTINATION TYPE

<u>In the mountains</u>	59%	+13
<u>By a lake</u>	50%	+17
<u>Countryside</u>	24%	+7
Elsewhere in nature	36%	+0
By the sea	48%	-22

TYPE OF
ACCOMMODATION

<u>Apartment</u>	60%	+17
<u>Tourist farm</u>	55%	+25
Camp	27%	+8
<u>Camper</u>	12%	+7
Hostel	35%	-1

TRANSPORT TO THE
DESTINATION

<u>Car</u>	46%	+17
<u>Coach</u>	9%	+3
Motorhome (camper)	3%	+1
Aeroplane	42%	-18

TRANSPORT AT THE
DESTINATION

Car	72%	+3
<u>Motorhome (camper)</u>	9%	+5
Coach	33%	-7
On foot	15%	-5
Train	15%	-3

ACTIVITIES

<u>Sports activities</u>	47%	+18
<u>Activities and fun for children</u>	39%	+23
<u>Countryside, farm activities</u>	27%	+16
<u>Winter sports</u>	26%	+9
Recreation	48%	-9

MOTIVATION

<u>Past experience</u>	54%	+6
Recommendations from friends	45%	+1
Articles in print media	20%	+3
TV programmes	18%	+1
Videos on the Internet	17%	+1

SOURCE OF
INFORMATION

<u>Friends, family</u>	60%	+8
Web forums	29%	-2
Travel presentations	20%	+6
Travel literature	22%	-4
Articles on the Internet	49%	-6

RESERVATION METHOD

<u>Agoda.com</u>	16%	+11
Booking.com	46%	-1
Directly at the accommodation provider	23%	+1
Organiser	13%	+2
At the activity provider	10%	+2

TRAVELLING WITH

As a couple	48%	-1
Friends	18%	+4
Alone	3%	+0
Family	31%	-3

CHARACTERISTICS:

Size*	478,371
Share*	2%
Age	37
Women	38%

Summer	75%
Autumn	17%
Shorter trips	2
Longer trips	1

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POLAND: Carefree youth (3.6%)



DESTINATION TYPE

By the sea	80%	+11
Cities	63%	+26
Countryside	17%	+0
By a lake	21%	-12
In the mountains	30%	-16

TYPE OF
ACCOMMODATION

Hostel	75%	+39
Staying with relatives or friends	48%	+18
Tourist farm	29%	+0
Private accommodation (e.g. Airbnb)	27%	+1
Boutique hotel	20%	+4

TRANSPORT TO THE
DESTINATION

Car	38%	+9
Aeroplane	58%	-2
Motorhome (camper)	1%	+0
Train	1%	-1
Coach	1%	-5

TRANSPORT AT THE
DESTINATION

Car	67%	-2
Train	21%	+4
Motorcycle	13%	+9
On foot	18%	-2
Motorhome (camper)	8%	+4

ACTIVITIES

Music festivals and concerts	61%	+39
Sightseeing of a town, the capital	69%	+16
Social events, festivals	50%	+27
Sun and sea	65%	+6
Nightlife (bars, clubs)	38%	+20

MOTIVATION

Recommendations from friends	56%	+11
Price of the destination	44%	+5
Popularity of the destination	26%	+7
Posts on social media, blogs	23%	+5
TV programmes	21%	+4

SOURCE OF
INFORMATION

Friends, family	68%	+16
Blogs	31%	+1
Web portals (TripAdvisor etc.)	25%	+0
Articles on the Internet	50%	-5
Articles in print media	16%	-3

RESERVATION METHOD

Own accommodation	26%	+9
Airbnb	18%	+7
Booking.com	39%	-8
Organiser	13%	+2
Agoda.com	8%	+3

TRAVELLING WITH

Friends	37%	+23
Relatives	2%	+2
As a couple	31%	-18
Family	27%	-6
Alone	2%	-1

CHARACTERISTICS:

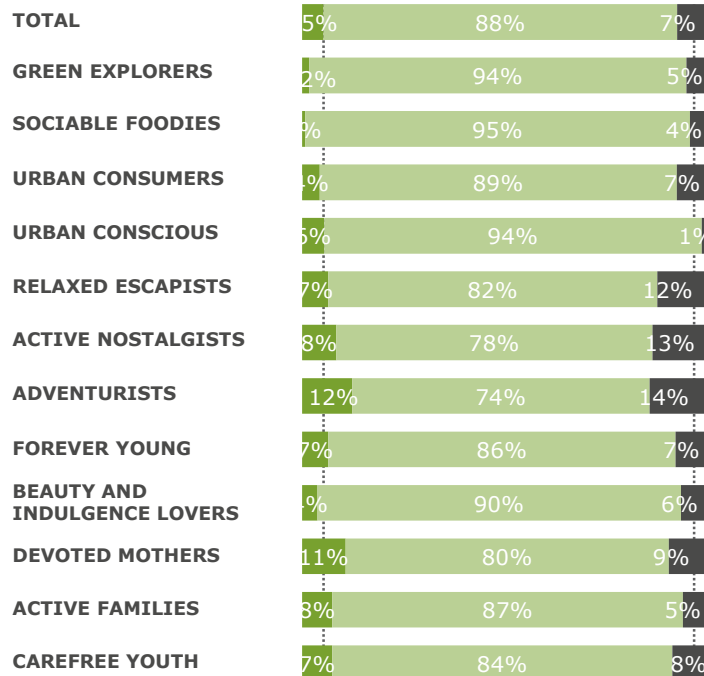
Size*	428,929
Share*	2%
Age	31
Women	44%

Summer	68%
Autumn	16%
Shorter trips	2
Longer trips	1

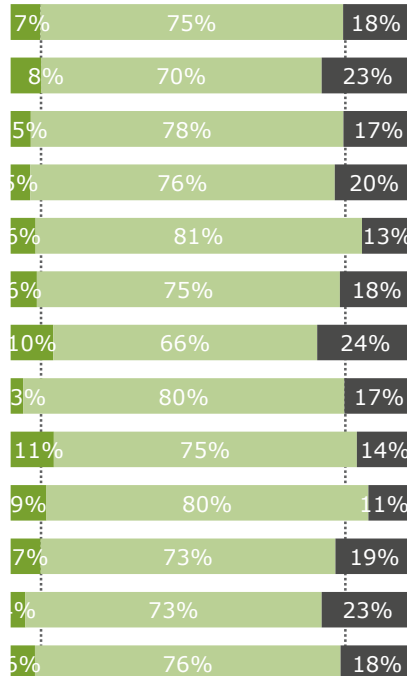
POLAND: Price sensitivity



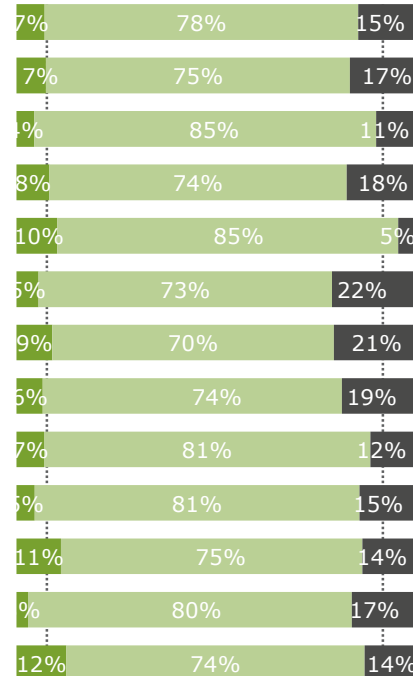
CHOICE OF ACCOMMODATION



CHOICE OF DESTINATION



CHOICE OF TRANSPORT

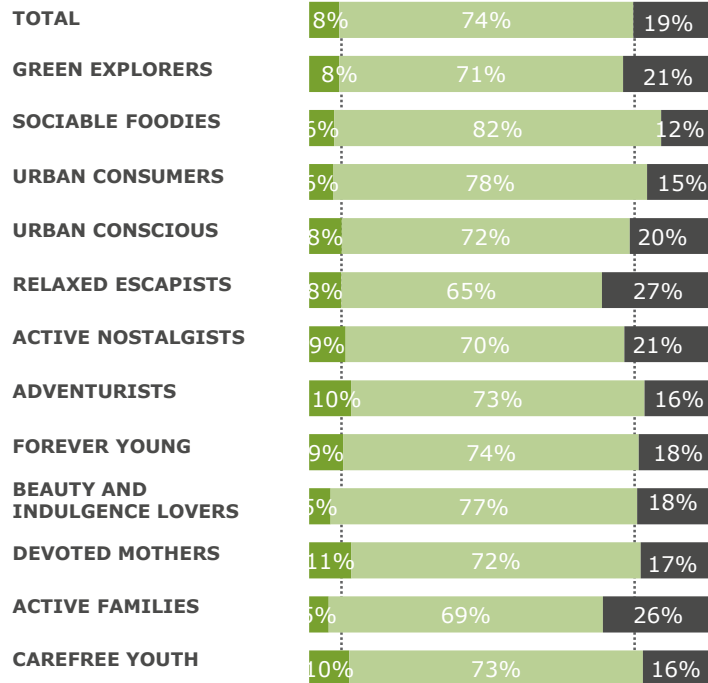


seek the most favourable offer
 assess value for money
 disregard the price

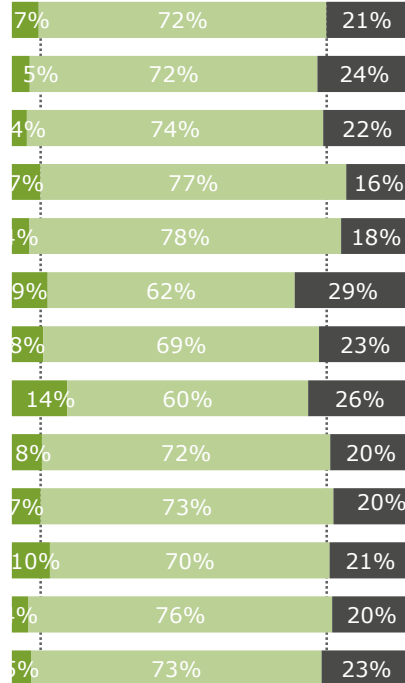
POLAND: Price sensitivity



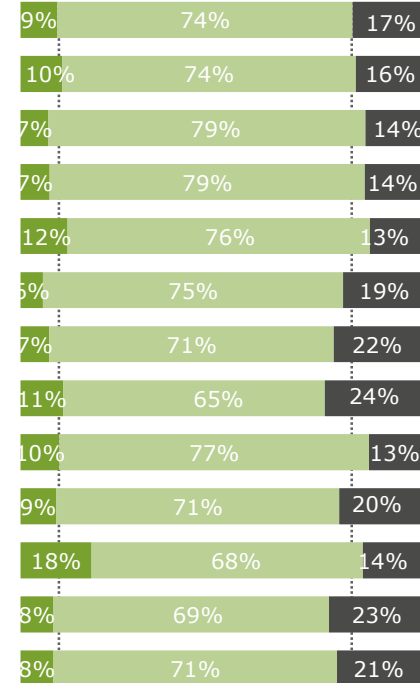
CHOICE OF ADDITIONAL ACTIVITIES



CHOICE OF FOOD



SHOPPING

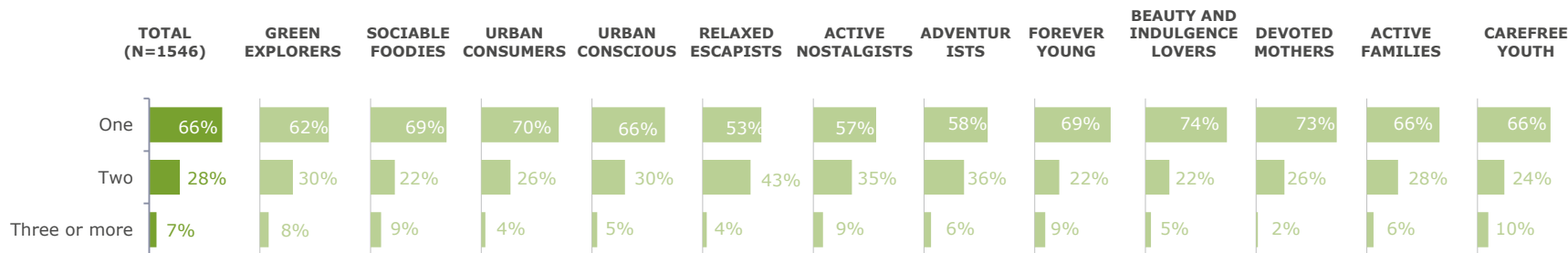


seek the most favourable offer
 assess value for money
 disregard the price

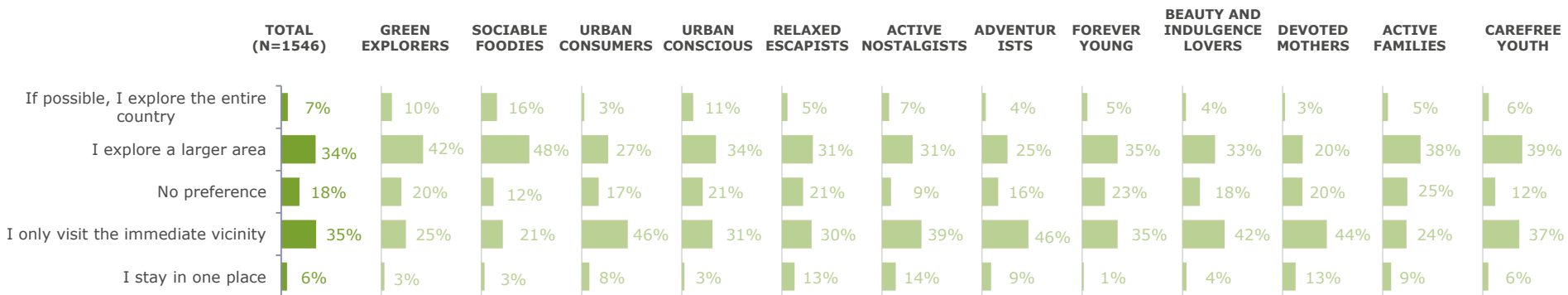
POLAND: Level of exploration



Number of countries visited during one trip, break or holiday



Exploring in one country



GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY





CHARACTERISTICS OF THE TARGET GROUP:

Size	11,898,743	Summer	72%
Proportion	47.5%	Autumn	14%
Age	39	Shorter trips	2
Women	49%	Longer trips	1

TRAVELLING WITH:

As a couple	49%
Family	34%
Friends	14%
Sam	3%

DESTINATION TYPE:

By the sea	49%	21%	70%
In the mountains	10%	36%	46%
Towns	11%	26%	37%

3x
a year
travels
abroad

ACTIVITIES – TOP 10:

Sun and sea	58%
Sightseeing of old town centres	57%
Recreation	57%
Sightseeing of a town, the capital	53%
History and castles	51%
Nature parks, attractions	48%
Tourist attractions	46%
Museums, galleries, art	35%
Live like a local	34%
Water sports activities	30%

TRAVEL MOTIVES – TOP 10:

To learn something new	17%	42%
Relaxation	16%	38%
Rest, slow down the pace of life	13%	34%
Experience another culture	8%	34%
Visit a beautiful destination	6%	30%
Enjoy good food, drinks	3%	26%
Spend time with family, strengthen bonds	6%	24%
Spend time actively	6%	21%
Retreat from everyday life	4%	20%
Spend time with partner	5%	19%

VISITING COUNTRIES – TOP 10:

Greece	26%	37%
Italy	28%	37%
Germany	15%	35%
Spain	26%	33%
Croatia	22%	31%
Czechia	16%	31%
France	16%	25%
Hungary	12%	22%
Slovakia	10%	21%
United Kingdom	13%	20%
Slovenia	1%	4%

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).

POLAND: Elements of the purchase journey and consumption



TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Relatives, friends: 30%

Tourist farm 30%

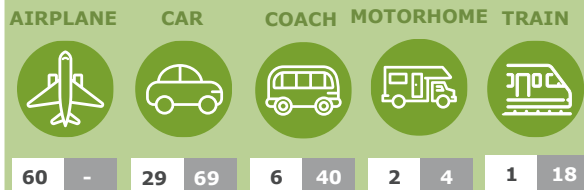
Private accommodation: 27%

RESERVATION

**UP
TO 3
months in
advance**

72%

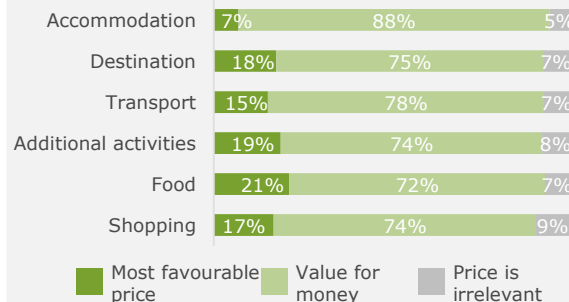
TRANSPORT MODE (%):



□ To the destination

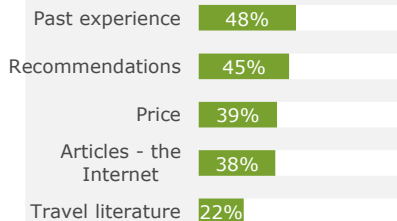
■ At the destination (20% ON FOOT, 7% BICYCLE, 4% MOTORCYCLE)

PRICE SENSITIVITY:

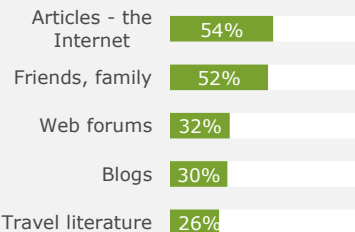


PURCHASE JOURNEY:

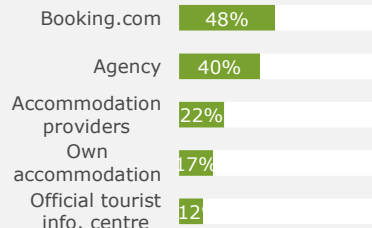
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€50	€54
TRANSPORT per person	€89	€114

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.

POLAND: General travel habits and motives

Subsample: visitors to Slovenia



CHARACTERISTICS OF VISITORS TO SLOVENIA:

Size	3,258,119	Summer	69%
Proportion	13.0%	Autumn	14%
Age	39	Shorter trips	3
Women	43%	Longer trips	2

TRAVELLING WITH:

Family	41%
As a couple	32%
Friends	14%
Alone	10%
Relatives	2%

DESTINATION TYPE:

By the sea	46%	22%	68%
In the mountains	13%	35%	48%
Elsewhere in nature	9%	32%	41%

5x

a year
travels
abroad

ACTIVITIES – TOP 10:

Sightseeing of old town centres	52%
Sun and sea	51%
History and castles	51%
Recreation	50%
Nature parks, attractions	45%
Sightseeing of a town, the capital	45%
Tourist attractions	41%
Museums, galleries, art	37%
Sports activities	37%
Water sports activities	36%

TRAVEL MOTIVES – TOP 10:

To learn something new	17%	40%
Relaxation	12%	34%
Experience another culture	8%	33%
Rest, slow down the pace of life	12%	30%
Visit a beautiful destination	5%	24%
Spend time with family, strengthen bonds	5%	22%
Contact with nature	4%	22%
Spend time actively	7%	21%
Enjoy good food, drinks	3%	20%
Spend time with partner	6%	20%

VISITING COUNTRIES – TOP 10:

Greece	29%	44%
Italy	28%	42%
Croatia	25%	39%
Spain	26%	36%
Germany	12%	36%
Czechia	15%	32%
France	16%	29%
Hungary	12%	26%
Slovakia	9%	24%
Bulgaria	11%	24%
Slovenia	5%	13%

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).

POLAND: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia



TYPE OF ACCOMMODATION:



78%



45%



35%

Other frequent accommodation types:

Tourist farm 29%

Relatives, friends: 24%

Camp: 19%

RESERVATION

**UP
TO 3
months in
advance**

71%

TRANSPORT MODE (%):

AIRPLANE



64

CAR



26

72

MOTORHOME



4

8

COACH



4

35

MOTORCYCLE



2

7

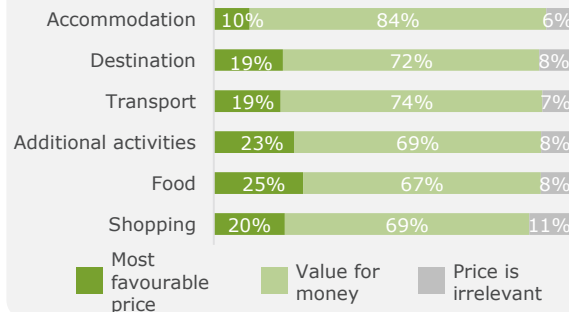


To the destination



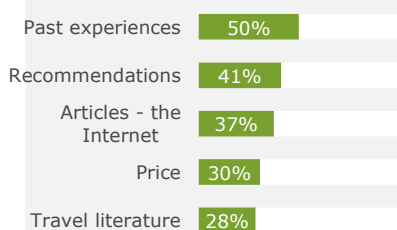
At the destination (14% TRAIN, 11% ON FOOT, 7% BICYCLE)

PRICE SENSITIVITY:

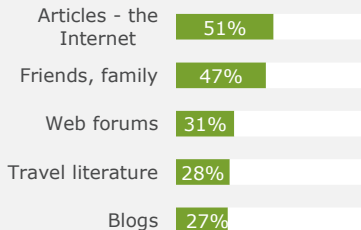


PURCHASE JOURNEY:

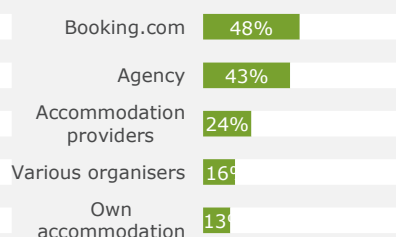
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€47	€50
TRANSPORT per person	€94	€124

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.

POLAND: General travel habits and motives

Subsample: tourists in Slovenia



CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size	424,321	Summer	62%
Proportion	1.7%	Autumn	17%
Age	45	Shorter trips	2
Women	39%	Longer trips	2

TRAVELLING WITH:

As a couple	53%
Family	33%
Friends	13%
Alone	2%

DESTINATION TYPE:

By the sea	43%	20%	63%
In the mountains	14%	37%	52%
Elsewhere in nature	8%	38%	47%

4x

a year
travels
abroad

ACTIVITIES – TOP 10:

Recreation	65%
Sightseeing of old town centres	65%
Sun and sea	64%
Nature parks, attraction	63%
Tourist attractions	60%
Sightseeing of a town, the capital	59%
History and castles	55%
Live like a local	53%
Museums, galleries, art	51%
Gastronomic pleasures	48%

TRAVEL MOTIVES – TOP 10:

To learn something new	16%	50%
Experience another culture	12%	42%
Visit a beautiful destination	10%	40%
Enjoy good food, drinks	6%	31%
Experience diversity	3%	30%
Spend time with family, strengthen bonds	8%	25%
Rest, slow down the pace of life	13%	25%
Relaxation	5%	22%
Visit a town, the capital	2%	19%
Contact with nature	0%	19%

VISITING COUNTRIES – TOP 10:

Slovenia	36%	100%
Croatia	44%	77%
Italy	55%	76%
Czechia	28%	69%
Slovakia	28%	64%
Germany	25%	60%
Hungary	25%	60%
Greece	37%	58%
France	24%	50%
Austria	23%	47%

■ 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).

POLAND: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia



TYPE OF ACCOMMODATION:



Other frequent accommodation types:

Tourist farm 41%

Private accommodation: 33%

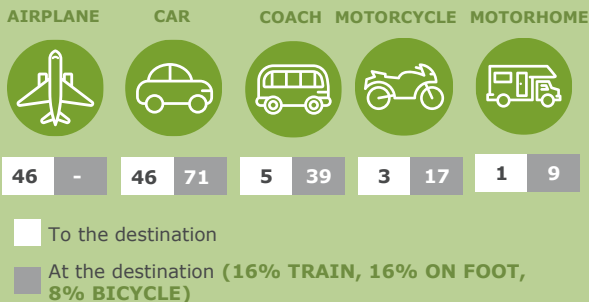
Boutique hotel: 23%

RESERVATION

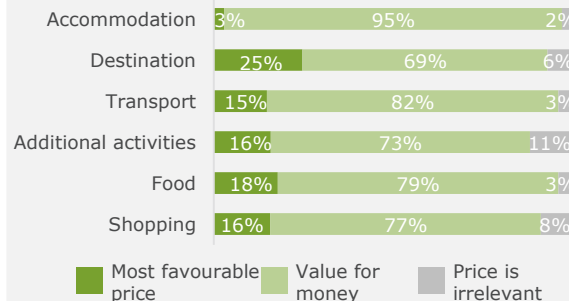
UP
TO 3
months in
advance

62%

TRANSPORT MODE (%):

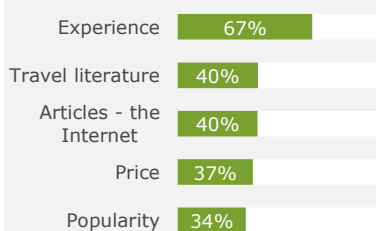


PRICE SENSITIVITY:

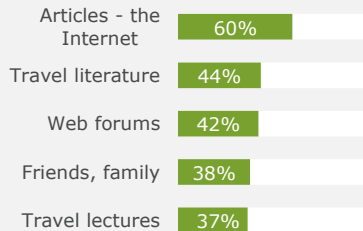


PURCHASE JOURNEY:

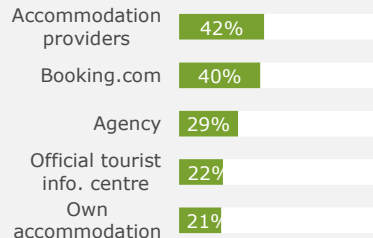
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	€43	€44
	in SLO	€38	€35
TRANSPORT per person	in Europe	€81	€117
	in SLO	€61	€86

NOTES:

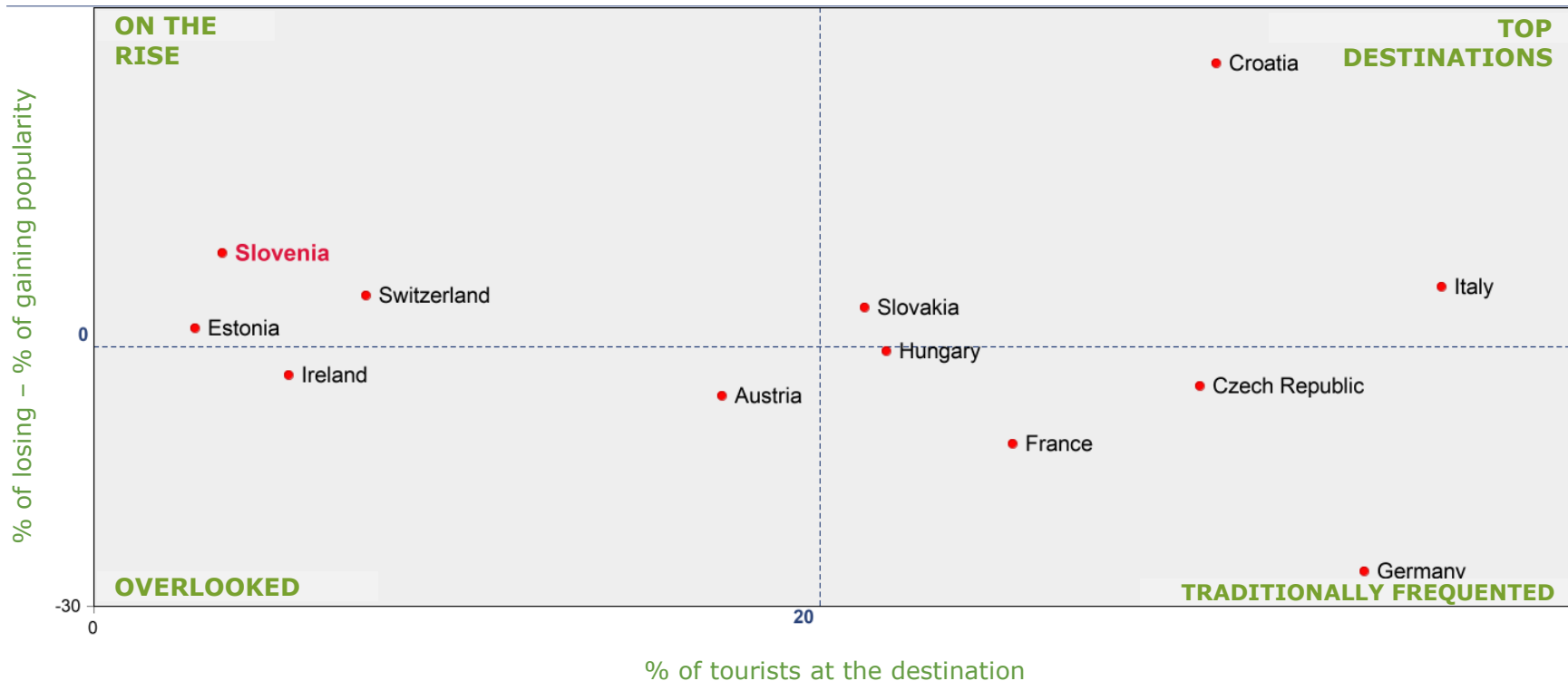
The results represent the subsample in the target group: they travel abroad at least once a year for a break or holiday, their destinations also include Slovenia. / TYPE OF ACCOMMODATION: where they usually spend the night. / RESERVATION: how far in advance they book. / TRANSPORT MODE: how they travel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



POLAND: Destination relevance

Share of visitors by popularity of the destination

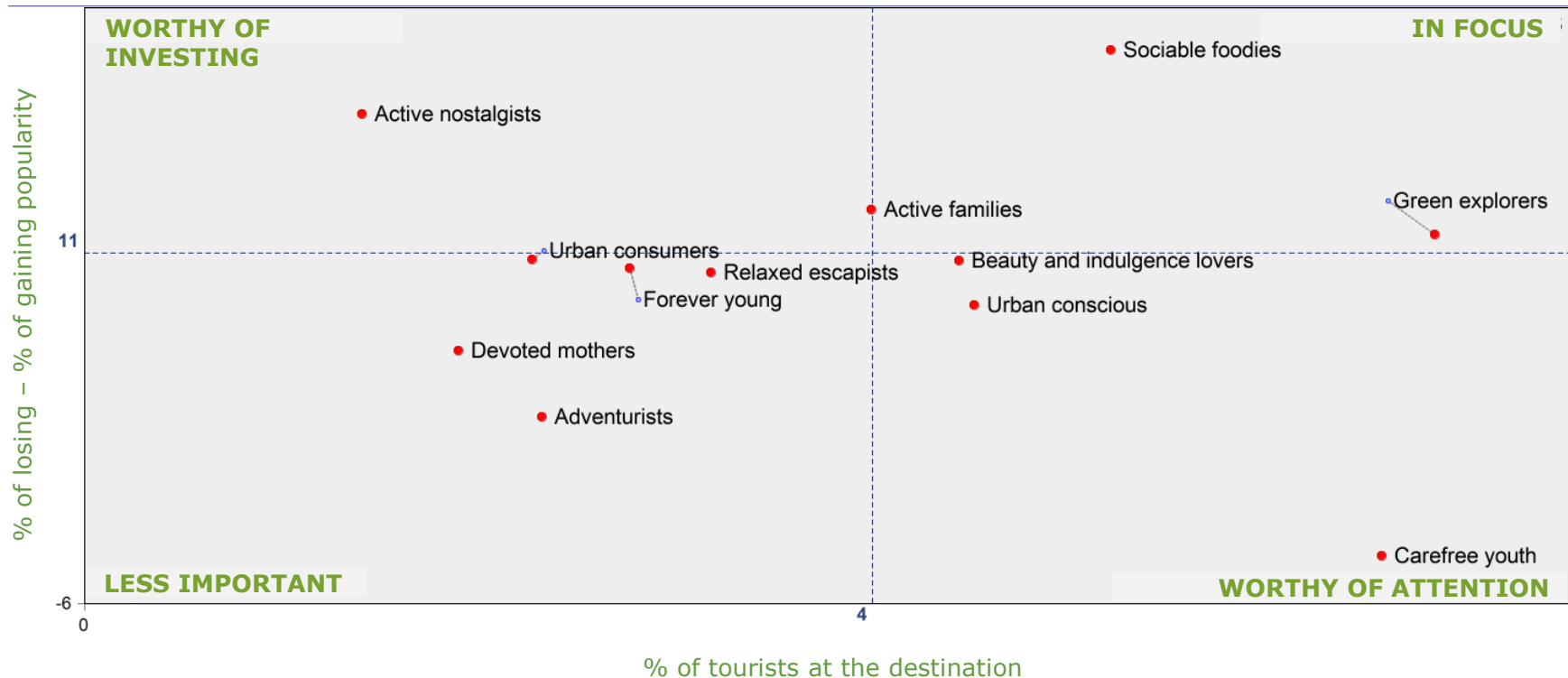


NOTES:

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).

POLAND: Slovenia's relevance

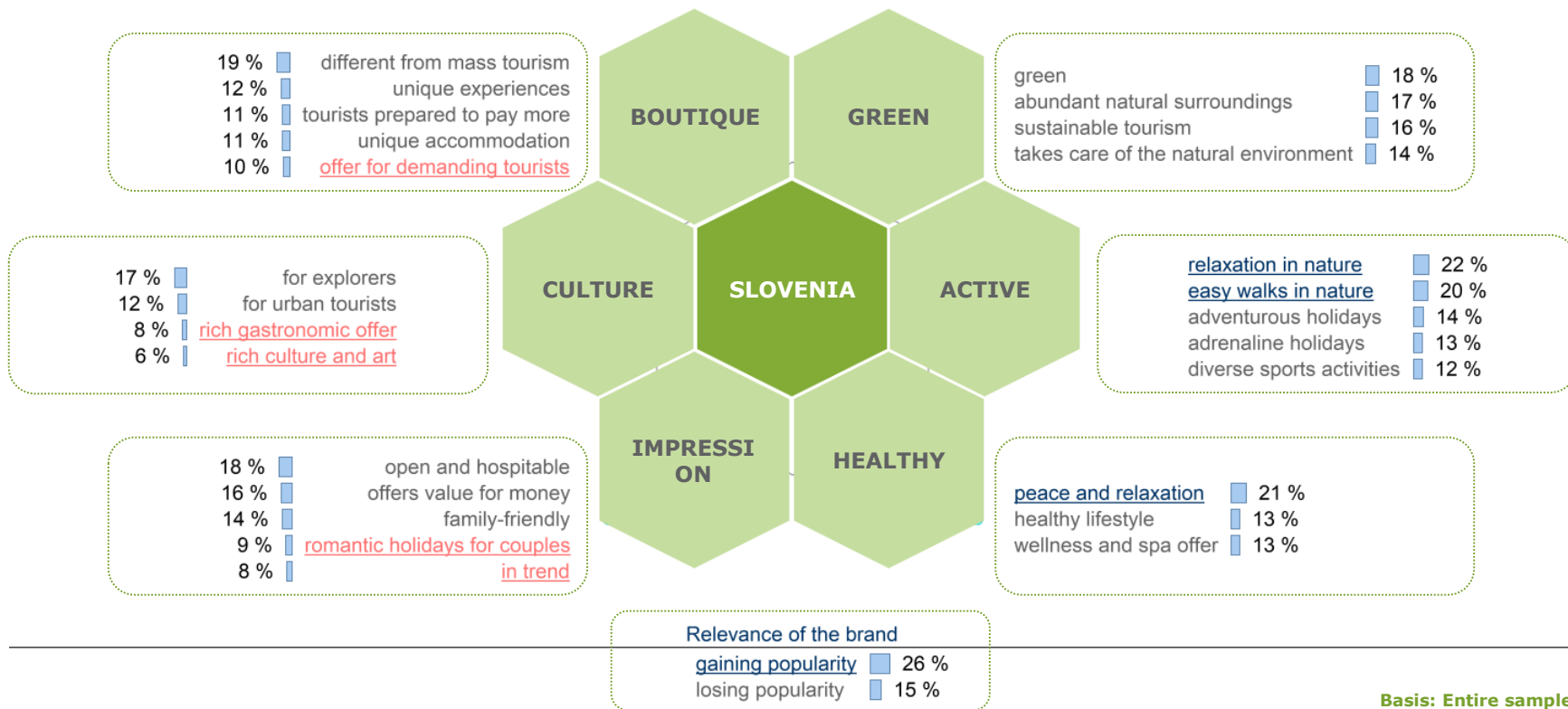
Slovenia's relevance as a tourist destination according to the popularity by segments of tourists



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).

POLAND: Slovenia's image



Basis: Entire sample

NOTES:

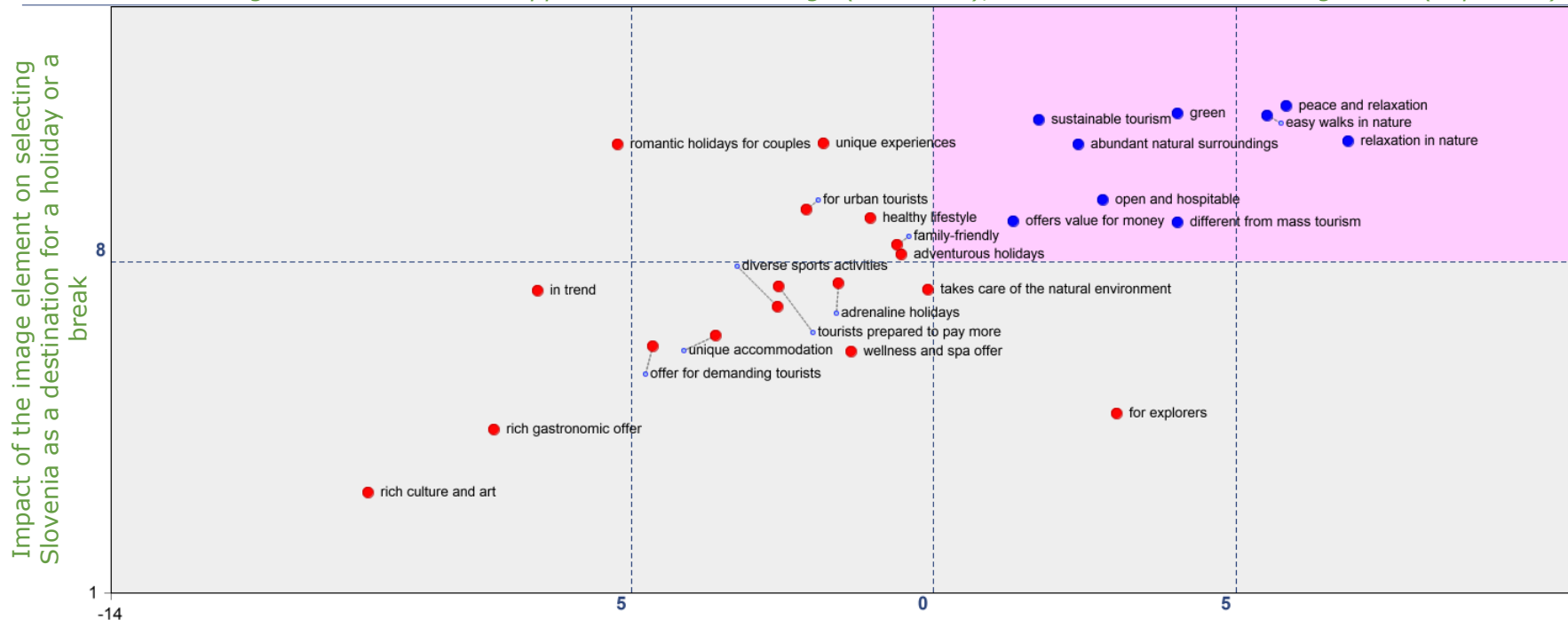
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

POLAND: 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)*

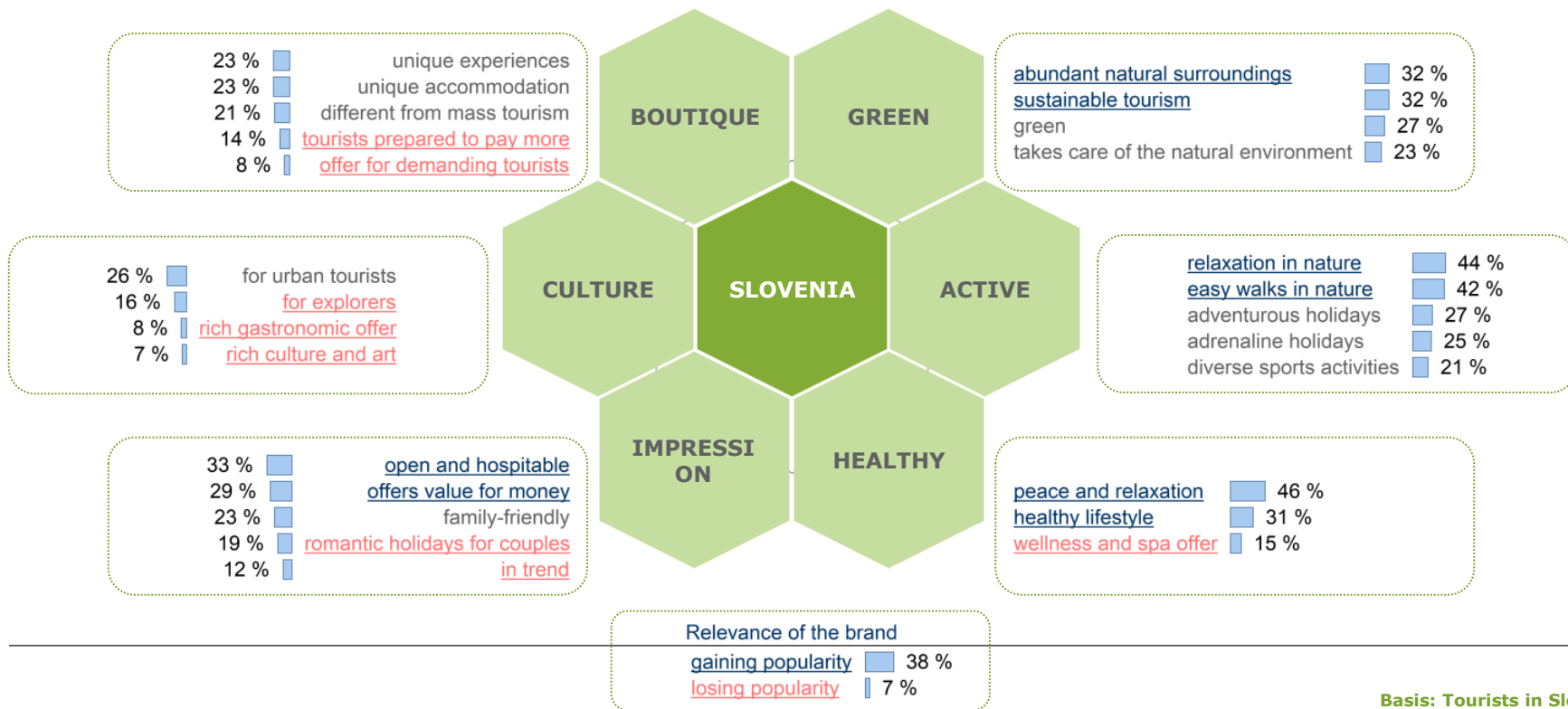


NOTES:

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.

POLAND: 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.

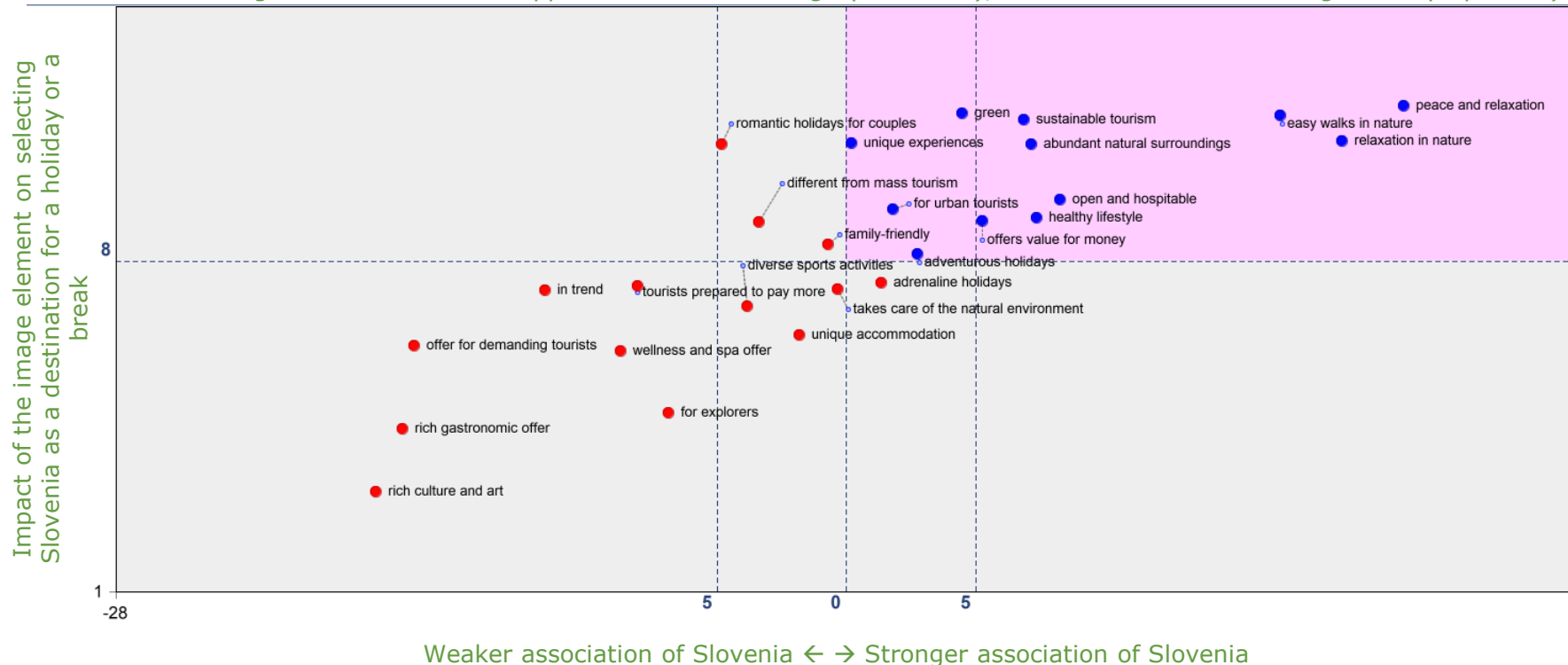
POLAND: Significance of elements

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

Subsample: tourists in Slovenia



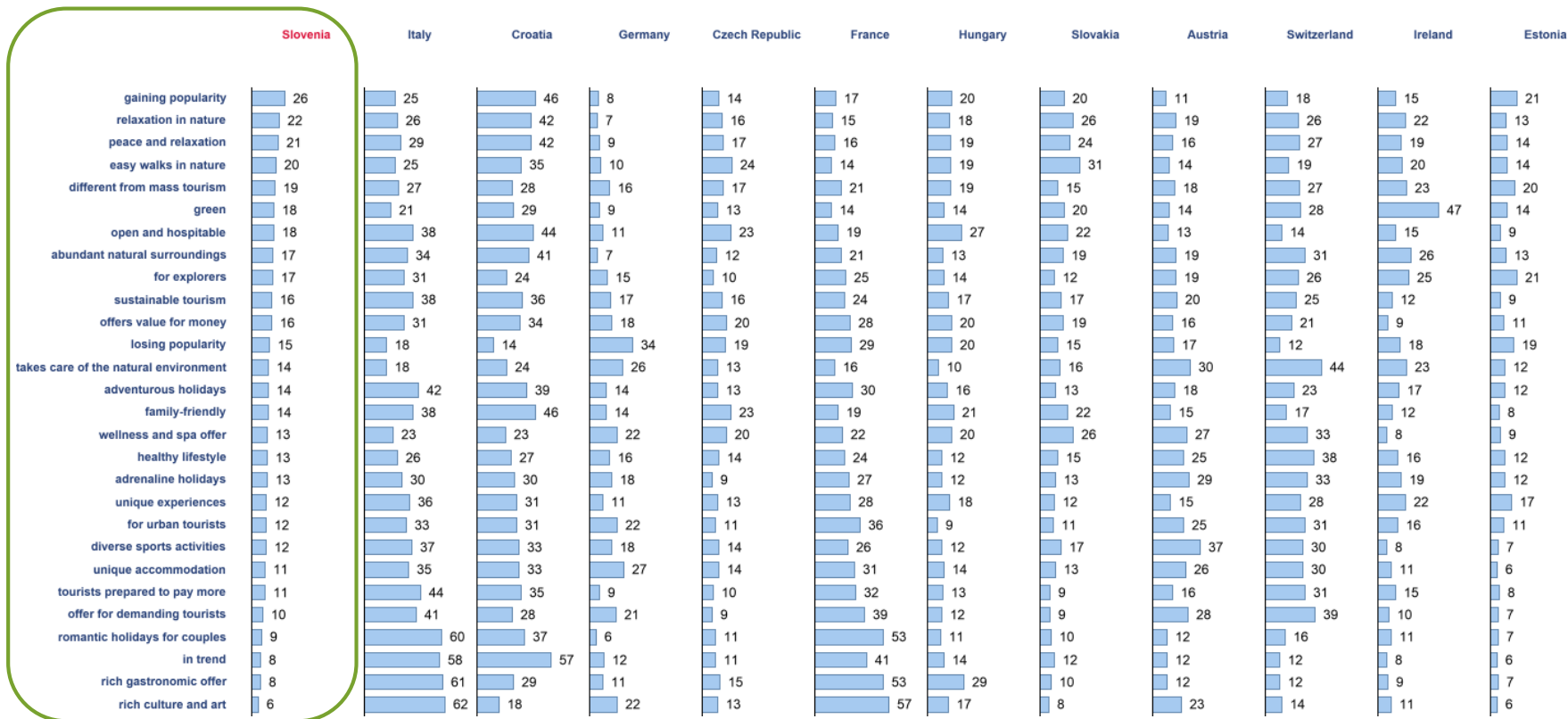
**interesting elements are in the upper section of the image (influential), the best ones are on the right side (important)*



NOTES:

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

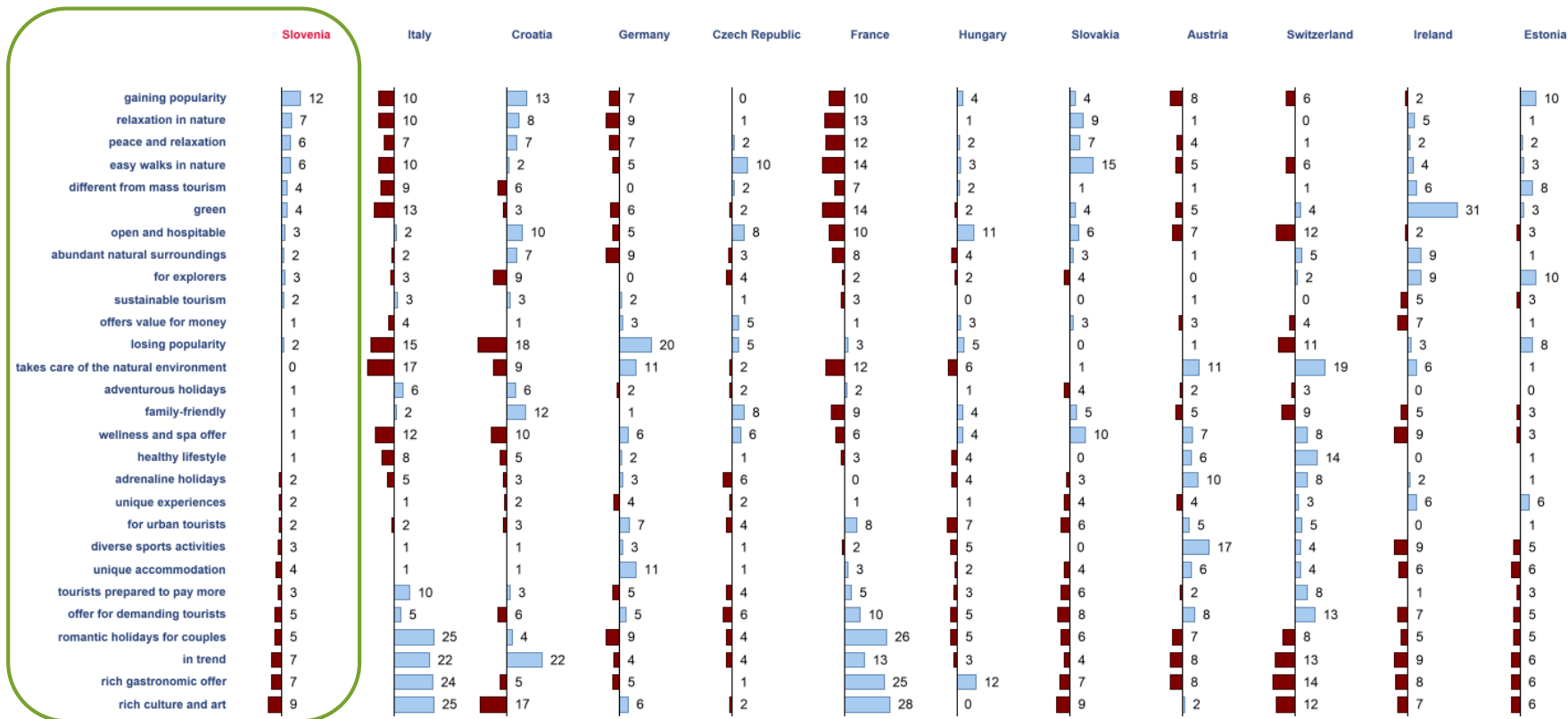
POLAND: Destination image



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.

POLAND: 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.

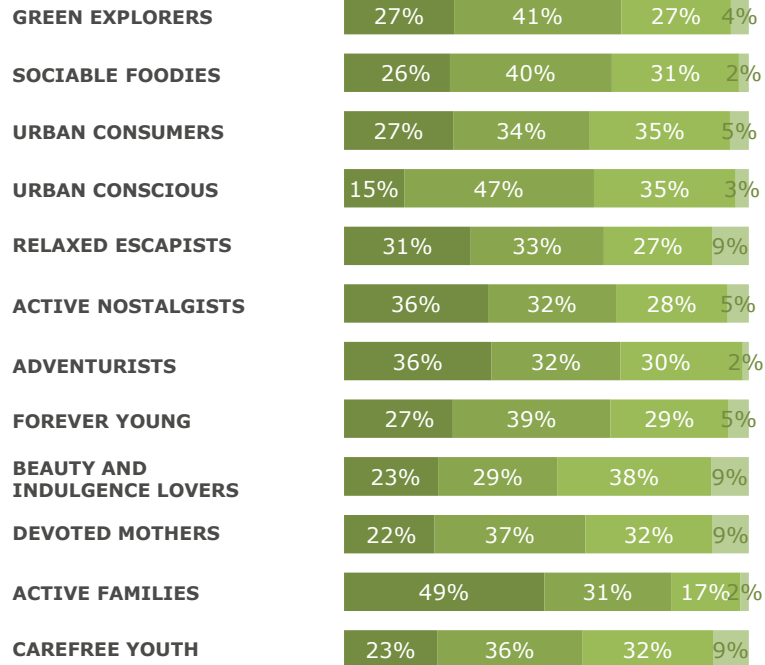
SLOVENIA: KNOWLEDGE, EXPERIENCE AND RECOMMENDATIONS



POLAND: Knowledge of, and experience with, Slovenia

KNOWLEDGE OF SLOVENIA

Basis: sample

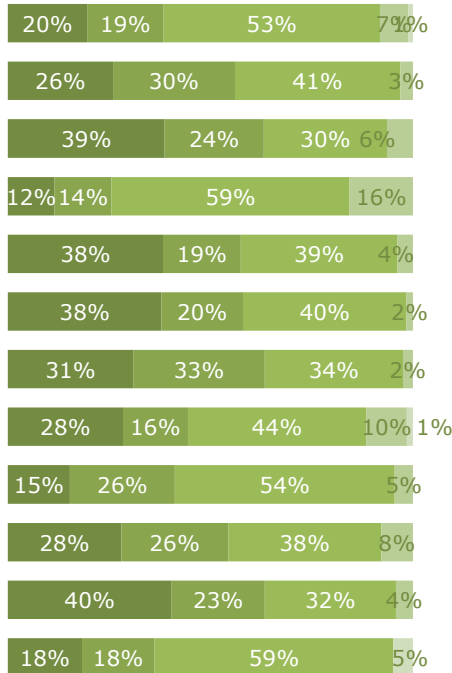


Knowledge:



SATISFACTION

Basis: visitors to Slovenia

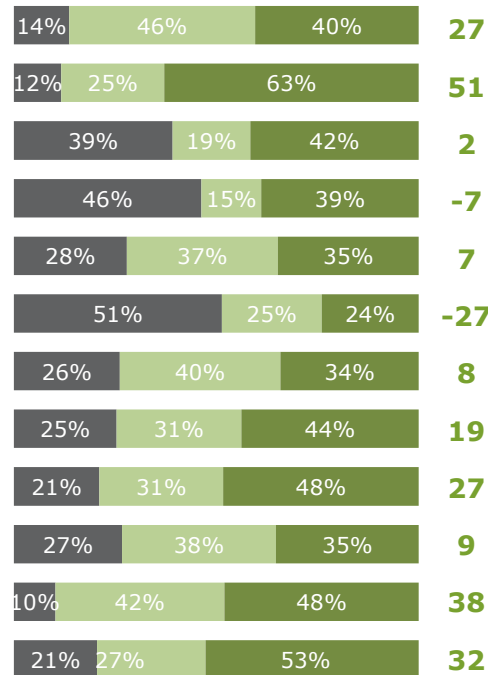


Meeting of expectations:



NPS –DEGREE OF RECOMMENDATION

NPS Index



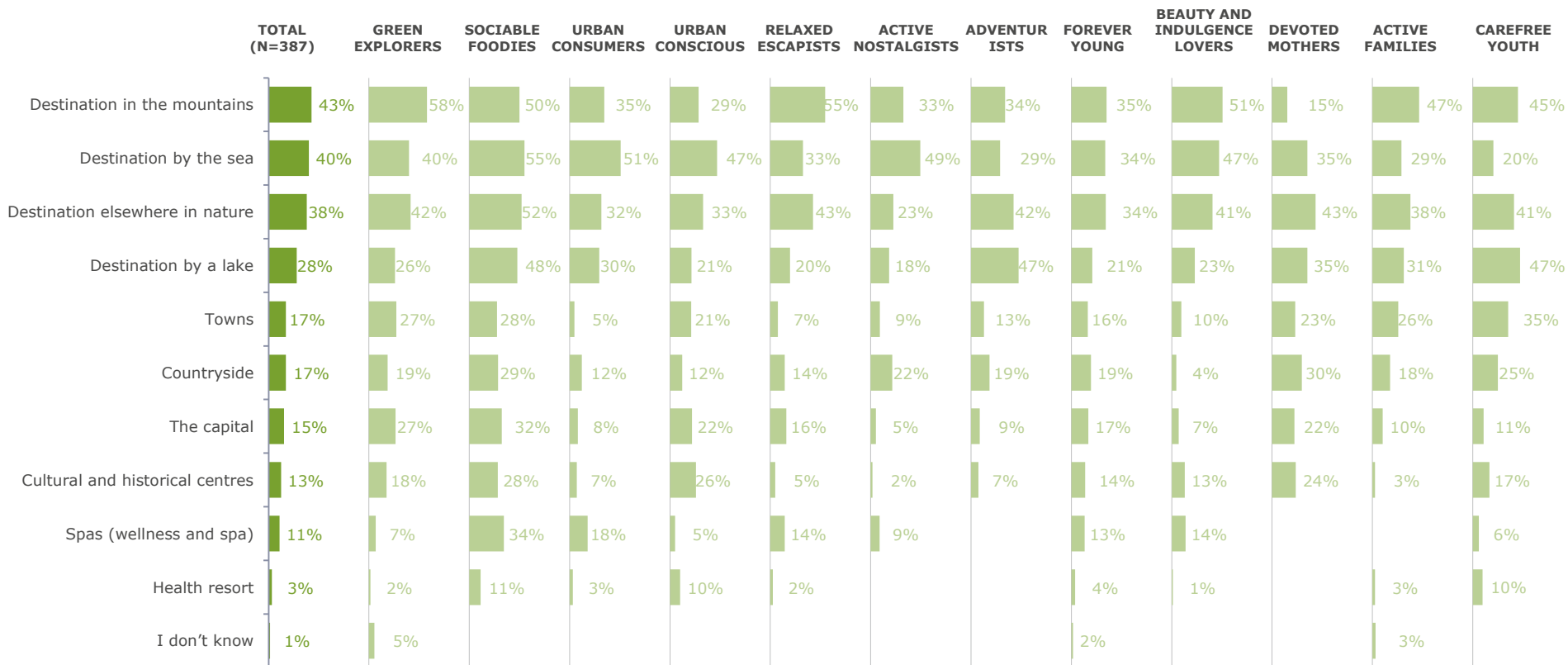
Recommendations:



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.

POLAND: Destination type in Slovenia

Subsample: visitors to Slovenia

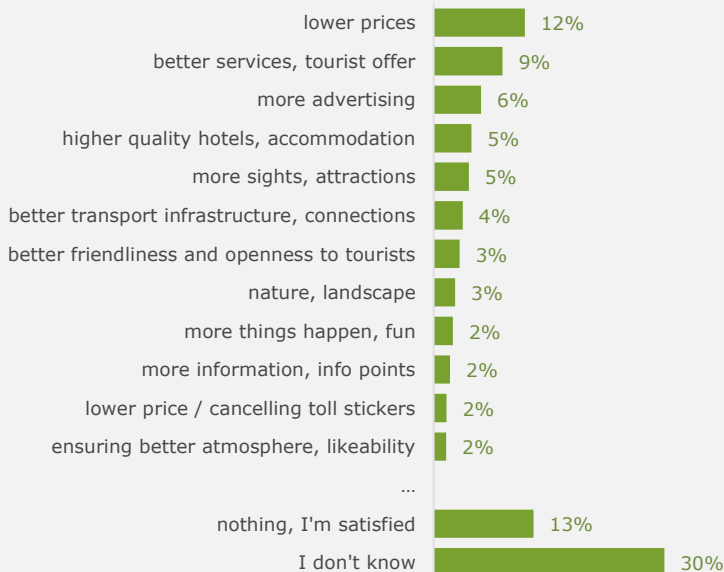


NOTES:

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=246

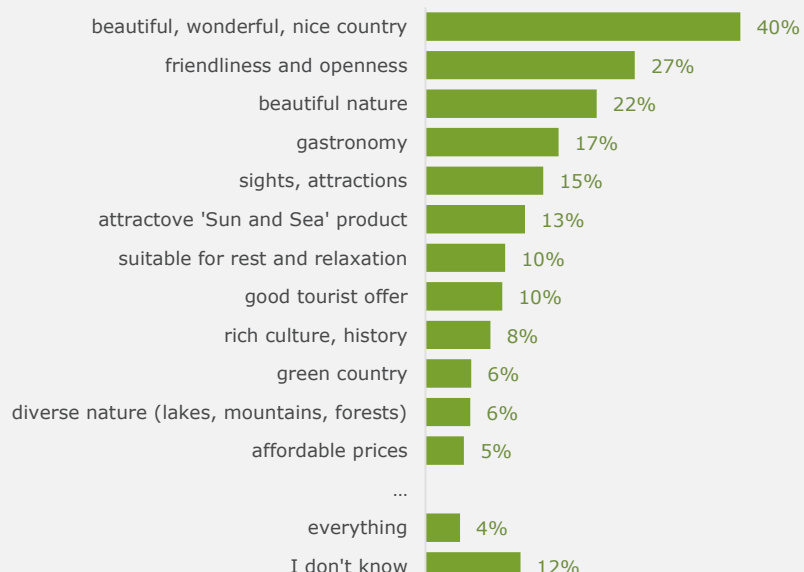


NOTES:

OTHER STATEMENTS: more hotel facilities, accommodation, gastronomy, I'm not familiar enough, unattractiveness of the 'sun and sea' product, better cleanliness and orderliness, different social and political attitude, it is too far

Elements of excitement – Top 12

Promoters (would recommend Slovenia), n=179

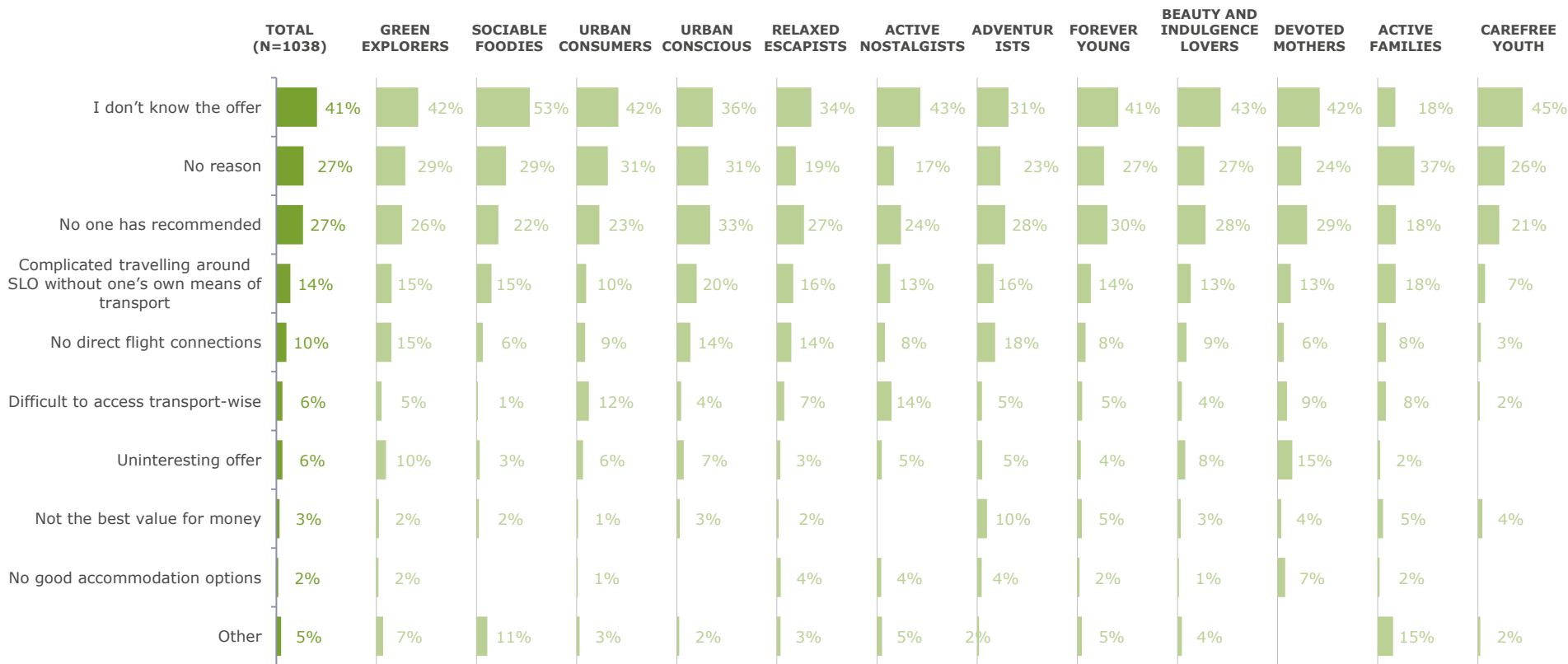


NOTES:

OTHER STATEMENTS: accommodation, proximity, location, cleanliness and orderliness, pleasant, fun atmosphere, good and high-quality services, easy communication, it is not crowded, no mass tourism

POLAND: 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*
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
UK	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

POLAND: Green explorers (15%)



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	72%	+26
------------------	------------	------------

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

TYPE OF ACCOMMODATION

Apartments	67%	+24
------------	------------	------------

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	60%	+0
-----------	------------	-----------

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

TRANSPORT AT THE DESTINATION

Coach	51%	+11
-------	------------	------------

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

ACTIVITIES

Sightseeing of old town centres	84%	+27
Sightseeing of town, the	78%	+25

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

MOTIVATION

Price of the destination	51%	+13
Articles in media	27%	+10

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

SOURCE OF INFORMATION

Articles on the Internet	61%	+7
Travel literature	36%	+10
Web forums	37%	+5

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

RESERVATION METHOD

Booking.com	60%	+12
Directly at the accommodation provider	30%	+7

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

TRAVELLING WITH

As a couple	48%	-1
Family	36%	+2
Alone	4%	+1
Friends	12%	-2

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

CHARACTERISTICS:

Size*	2,697,205
Share*	7%
Age	39
Women	47%

Summer	70%
Autumn	15%
Shorter trips	2
Longer trips	1

POLAND: 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	18,026,78		72%
Proportion	47%		14%
Age	39		2
Women	49%		1

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

Longer trips

TRAVELLING WITH:

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

Friends	14%
Alone	3%

DESTINATION TYPE:

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

Towns	11%	26%	37%
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3x

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)

History and sea	58%
History and castles	51%
Nature parks, attractions	48%
Tourist attractions	46%
Museums, galleries, art	35%
Live like a local	34%
Water sports activities	30%

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)

Visit something new	17%	42%
Visit a beautiful destination	8%	30%
Enjoy good food, drinks	3%	26%
Spend time with family, strengthen bonds	6%	24%
Spend time actively	6%	21%
Retreat from everyday life	4%	20%
Spend time with partner	5%	19%

VISITING COUNTRIES:

Top 10 – VISITING OF COUNTRIES AND THE INTENTION OF VISITING AGAIN, whereby a selection of European countries have 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)

Greece	26%	37%
Czechia	16%	31%
France	16%	25%
Hungary	12%	22%
Slovakia	10%	21%
United Kingdom	13%	20%
Slovenia	1%	4%

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).

POLAND: 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



60

COACH MOTORHOME TRAIN



1

18

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?

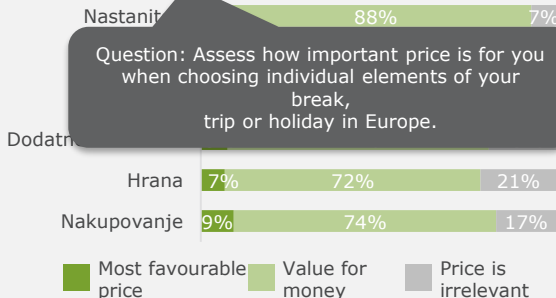


To the destination



At the destination (20% ON FOOT, 7% BICYCLE, 4% MOTORCYCLE)

PRICE SENSITIVITY:



27%

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)

Price	39%	Web forums	32%	Accommodation providers	22%
Articles - the Internet	38%	Blogs	30%	Own accommodation	17%
Travel literature	22%	Travel literature	26%	Official tourist info. centre	12%

BUDGET AND SPENDING:

PLANNED

ACTUAL

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

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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