STO SLOVENSKA TURISTIČNA ORGANIZACIJA | I FEEL SLOVENIA

VALICON TOURISM

IDENTIFICATION OF MARKET POTENTIAL

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

RUSSIA

December 2017

Contracting Authority

Name:	Slovenian Tourist Board
Address:	Dimičeva ulica 13, SI - 1000 Ljubljana
Contact:	Barbara Zmrzlikar

Contractor

Name:	Valicon d.o.o.
Address:	Kopitarjeva 2, 1000 Ljubljana
Contact:	Zenel Batagelj

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)

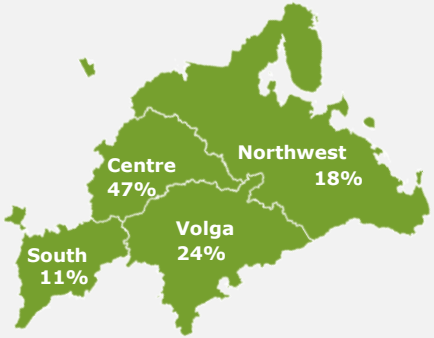
METHODOLOGY

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	Russia
Implementation period	30 November – 01 December 2017
Target group	Citizens of a certain country, who travel abroad at least once a year for a break, holiday, or a trip and spend at least two nights there.
Sample	Entire sample: n=5,829 Target group: n=1,583 Visitors to Slovenia: n=131 Tourists in Slovenia: n=29
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=24:25.

RUSSIA: Sample demographics

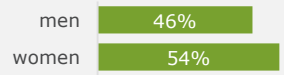
REGIONS:



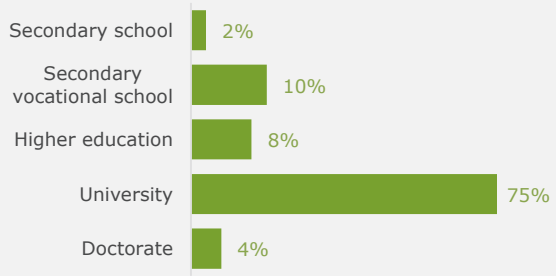
DETAILED DEFINITION OF REGIONS:

Centre: Central Federal District. **South:** The South Federal District **Northwest:** The Northwest Federal District **Volga:** The Volga Federal District.

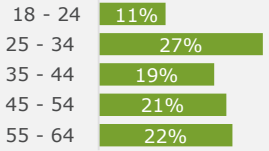
GENDER:



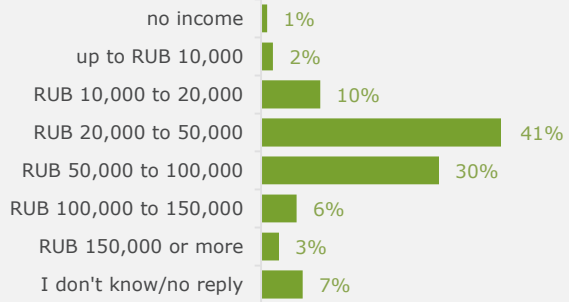
EDUCATION:



AGE:



PERSONAL INCOME:



Sample shares and sizes

Bordered ellipses show the basis for share calculations.

Basis: RUSSIA 18–65-year-olds	
POPULATION (18–65 YEARS)	100.0%
TARGET GROUP	27.2%
VISITORS TO SLOVENIA	2.2%
TOURISTS IN SLOVENIA	0.5%

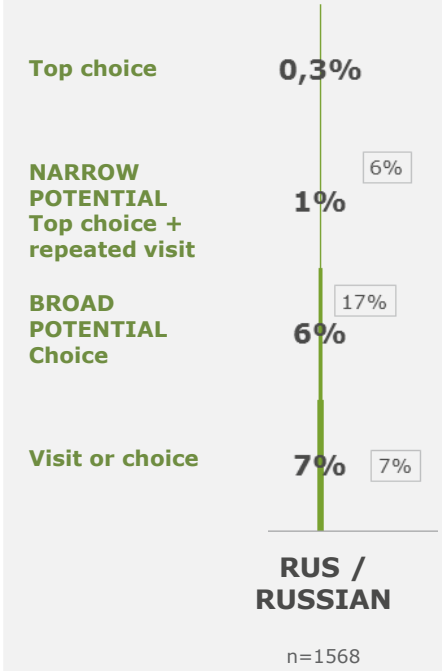
Basis: TARGET GROUP	
POPULATION (18–65 YEARS)	/
TARGET GROUP	100.0%
VISITORS TO SLOVENIA	8.0%
TOURISTS IN SLOVENIA	1.8%

Absolute size*
97,436,838
26,540,211
2,183,667
486,324

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

MARKET STRUCTURE AND SIZE (PERSONAS)

RUSSIA: Size of the potential



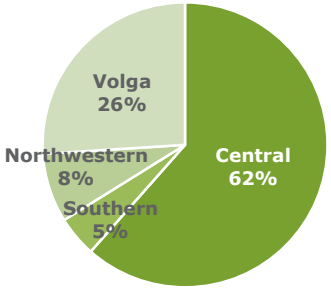
NARROW POTENTIAL:

1%

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

	Size*
Total in TG:	**293,820**
Central	180,763
South	13,584
Northwest	23,037
Volga	76,436

REGIONAL CLASSIFICATION:



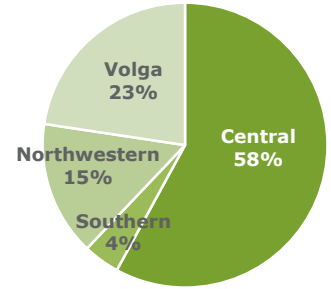
BROAD POTENTIAL:

6%

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

	Size*
Total in TG:	**1,485,158**
Central	860,666
South	61,367
Northwest	227,150
Volga	335,975

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.

RUSSIA: Size of segments by regions

FOREVER YOUNG:

16.2%	4,306,013

SOCIABLE FOODIES:

16.0%	4,243,071

GREEN EXPLORERS:

14.8%	3,932,358

		Total	Central	South	Northwest	Volga
	%	100.0%	46.9%	11.4%	18.2%	23.5%
	Size	26,540,211	12,454,065	3,020,548	4,833,218	6,232,380
GREEN EXPLORERS	%	14.8%	48.3%	8.8%	20.1%	22.8%
	Size	3,932,358	1,898,913	347,229	791,528	894,689
SOCIABLE FOODIES	%	16.0%	45.0%	10.1%	15.5%	29.4%
	Size	4,243,071	1,908,099	426,865	658,744	1,249,362
URBAN CONSUMERS	%	14.6%	49.4%	11.0%	14.9%	24.8%
	Size	3,866,496	1,908,824	423,624	576,917	957,131
URBAN CONSCIOUS	%	7.3%	42.4%	17.9%	23.0%	16.7%
	Size	1,934,903	821,117	346,331	445,052	322,403
RELAXED ESCAPISTS	%	10.2%	43.8%	10.5%	24.0%	21.7%
	Size	2,701,507	1,183,563	284,669	647,538	585,737
ACTIVE NOSTALGISTS	%	2.6%	47.9%	12.1%	21.7%	18.3%
	Size	685,074	328,197	83,212	148,426	125,240
ADVENTURISTS	%	1.3%	51.8%	13.4%	3.9%	30.9%
	Size	357,840	185,398	48,037	13,892	110,512
FOREVER YOUNG	%	16.2%	47.0%	10.7%	19.8%	22.5%
	Size	4,306,013	2,025,335	460,925	852,271	967,482
BEAUTY AND INDULGENCE LOVERS	%	10.7%	49.3%	12.9%	12.6%	25.3%
	Size	2,845,776	1,401,740	366,340	358,210	719,487
DEVOTED MOTHERS	%	1.2%	57.2%	13.1%	20.0%	9.7%
	Size	321,445	183,871	42,139	64,278	31,157
ACTIVE FAMILIES	%	1.4%	45.4%	13.6%	32.2%	8.8%
	Size	369,392	167,715	50,301	118,843	32,533
CAREFREE YOUTH	%	3.7%	44.9%	14.4%	16.6%	24.1%
	Size	976,336	438,584	140,141	162,531	235,080

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.

RUSSIA

DESTINATION TYPE	
By the sea	86%
Cities	51%
Cultural and historical centres	50%
In the mountains	39%
Capitals	29%

TYPE OF ACCOMMODATION	
Hotel	91%
Apartment	37%
Private accommodation (e.g. Airbnb)	28%
Staying with relatives or friends	24%
Hostel	22%

TRANSPORT TO THE DESTINATION	
Aeroplane	88%
Car	6%
Train	3%
Coach	2%
Ship or another vessel	0%

TRANSPORT AT THE DESTINATION	
Coach	61%
Car	54%
On foot	24%
Train	22%
Bicycle	4%

ACTIVITIES	
Sun and sea	81%
Seeing major tourist attractions	66%
Sightseeing of old town centres	65%
Natural sights, nature	65%
Sightseeing of a town, the capital	59%

MOTIVATION	
Past experience	58%
Price of the destination	55%
Recommendations from friends	51%
Articles on the Internet	40%
Suitability of the destination in all seasons	26%

SOURCE OF INFORMATION	
Articles on the Internet	68%
Friends, family	47%
Web forums	42%
Web portals (TripAdvisor etc.)	35%
Opinions in social media	32%

RESERVATION METHOD	
Agency	63%
Booking.com	41%
Airbnb	13%
Directly at the accommodation provider	12%
Through official TICs	6%

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

CHARACTERISTICS:

Size*	**26,540,211**
Share*	**27%**
Age	**41**
Women	**54%**

Summer	**64%**
Autumn	**21%**
Shorter trips	**1**
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.

n=1568

RUSSIA: Tourists in Slovenia (1.8%)

DESTINATION TYPE		
Cities	**73%**	**+22**
Capitals	**51%**	**+21**
Cultural and historical centres	57%	+7
By a lake	34%	+11
By the sea	77%	-10

TYPE OF ACCOMMODATION		
Staying with relatives or friends	33%	+9
Hostel	31%	+9
Boutique hotel	22%	+11
Apartment	40%	+3
Hotel	90%	-1

TRANSPORT TO THE DESTINATION		
Aeroplane	91%	+3
Motorcycle	2%	+2
Car	5%	-1
Motorhome (camper)	2%	+1

TRANSPORT AT THE DESTINATION		
Car	66%	+12
Train	**52%**	**+30**
Bicycle	5%	+2
On foot	23%	-1
Coach	49%	-12

ACTIVITIES		
Sightseeing of a town, the capital	**84%**	**+24**
Natural sights, nature	77%	+13
Cruises	37%	+16
Health treatments and services	36%	+14
Shopping	51%	+9

MOTIVATION		
Articles on the Internet	53%	+14
Past experience	69%	+11
TV programmes	38%	+15
Articles in print media	18%	+11
Suitability of the destination in all seasons	30%	+4

SOURCE OF INFORMATION		
Opinions in social media	45%	+13
Friends, family	56%	+9
Articles on the Internet	70%	+2
Articles in print media	21%	+11
Web portals (TripAdvisor etc.)	40%	+5

RESERVATION METHOD		
Booking.com	**63%**	**+22**
Directly at the accommodation provider	**28%**	**+16**
Airbnb	24%	+11
Through official TICs	11%	+5
Organiser	11%	+6

TRAVELLING WITH		
As a couple	37%	+5
Relatives	9%	+7
Family	32%	-9
Friends	13%	-1
Alone	9%	-1

CHARACTERISTICS:

Size*	**486,324**
Share*	**0.5%**
Age	**46**
Women	**65%**
Spring	**66%**
Summer	**15%**
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.

n=29

RUSSIA: Forever young (16.2%)

DESTINATION TYPE		
By the sea	84%	-3
Zdravilišča	**16%**	**+5**
Cultural and historical centres	40%	-10
Spas (wellness and spa)	16%	+1
In the mountains	28%	-10

TYPE OF ACCOMMODATION		
Hotel	**95%**	**+4**
Staying with relatives or friends	22%	-2
Own property (holiday cottage)	6%	+0
Apartment	27%	-10
Private accommodation (e.g. Airbnb)	22%	-6

TRANSPORT TO THE DESTINATION		
Aeroplane	89%	+1
Car	7%	+1
Ship or another vessel	1%	+0
Train	2%	-1
Bicycle	0%	+0

TRANSPORT AT THE DESTINATION		
Coach	63%	+2
On foot	25%	+1
Bicycle	3%	-1
Car	46%	-8
Train	19%	-3

ACTIVITIES		
Sightseeing of old town centres	**81%**	**+16**
Sun and sea	82%	+2
Seeing major tourist attractions	**73%**	**+6**
History and castles	**72%**	**+14**
Thermal health spas	**38%**	**+15**

MOTIVATION		
Price of the destination	**58%**	**+4**
Recommendations from friends	51%	+0
Suitability of the destination in all seasons	26%	+0
TV programmes	24%	+1
Proximity of the destination	16%	+1

SOURCE OF INFORMATION		
Articles on the Internet	66%	-2
Friends, family	46%	-1
Agencies	31%	+1
Web portals (TripAdvisor etc.)	34%	-1
Opinions in social media	32%	-1

RESERVATION METHOD		
Agency	**70%**	**+7**
Through official TICs	7%	+1
Directly at the accommodation provider	11%	-1
Agoda.com	3%	+0
Booking.com	37%	-4

TRAVELLING WITH		
Family	40%	-1
Alone	**14%**	**+4**
As a couple	31%	-2
Relatives	2%	+0
Friends	13%	-1

CHARACTERISTICS:

Size*	**4,306,013**
Share*	**4%**
Age	**45**
Women	**60%**

Summer	**55%**
Autumn	**26%**
Shorter trips	**1**
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.

n=255

RUSSIA: Sociable foodies (16.0%)

DESTINATION TYPE		
Cultural and historical centres	76%	+27
Cities	69%	+18
By the sea	93%	+7
Capitals	45%	+15
Elsewhere in nature	28%	+11

TYPE OF ACCOMMODATION		
Hotel	96%	+5
Staying with relatives or friends	38%	+13
Boutique hotel	23%	+12
Private accommodation (e.g. Airbnb)	36%	+9
Apartment	41%	+4

TRANSPORT TO THE DESTINATION		
Train	6%	+3
Aeroplane	88%	+0
Coach	2%	+0
Car	4%	-2

TRANSPORT AT THE DESTINATION		
Car	61%	+7
Coach	65%	+4
Train	27%	+5
On foot	27%	+2
Bicycle	3%	-1

ACTIVITIES		
Seeing major tourist attractions	92%	+26
History and castles	88%	+31
Natural sights, nature	89%	+24
Aquafun, amusement parks	65%	+28
Sightseeing of old town centres	87%	+22

MOTIVATION		
TV programmes	35%	+13
Suitability of the destination in all seasons	37%	+11
Popularity of the destination	35%	+11
Articles on the Internet	49%	+9
Price of the destination	60%	+5

SOURCE OF INFORMATION		
Articles on the Internet	80%	+12
Opinions in social media	41%	+9
Web forums	49%	+8
Friends, family	54%	+7
Agencies	38%	+8

RESERVATION METHOD		
Directly at the accommodation provider	19%	+7
Agency	65%	+2
Through official TICs	9%	+3
Organiser	6%	+1
Expedia.com	4%	+2

TRAVELLING WITH		
Family	49%	+7
As a couple	31%	-1
Friends	11%	-3
Relatives	3%	+0
Alone	6%	-4

CHARACTERISTICS:

Size*	4,243,071
Share*	4%
Age	40
Women	55%

Summer	71%
Autumn	18%
Shorter trips	1
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.

n=251

RUSSIA: Green explorers (14.8%)

DESTINATION TYPE		
Cultural and historical centres	74%	+24
In the mountains	69%	+30
By the sea	92%	+6
Capitals	46%	+16
By a lake	41%	+18

TYPE OF ACCOMMODATION		
Apartment	65%	+28
Private accommodation (e.g. Airbnb)	39%	+11
Hotel	90%	-2
Hostel	23%	+1
Camp	17%	+5

TRANSPORT TO THE DESTINATION		
Car	7%	+1
Aeroplane	88%	+0
Coach	2%	+0
Motorcycle	0%	+0
Train	2%	-1

TRANSPORT AT THE DESTINATION		
On foot	35%	+11
Car	58%	+3
Train	26%	+5
Bicycle	6%	+2
Coach	60%	-1

ACTIVITIES		
Natural sights, nature	84%	+20
Sightseeing of old town centres	81%	+16
Sightseeing of a town, the capital	72%	+13
Seeing major tourist attractions	72%	+6
Sports activities	29%	+13

MOTIVATION		
Price of the destination	63%	+8
Articles on the Internet	51%	+11
Suitability of the destination in all seasons	32%	+6
TV programmes	26%	+4
Videos on the Internet	23%	+4

SOURCE OF INFORMATION		
Articles on the Internet	74%	+5
Web portals (TripAdvisor etc.)	41%	+6
Friends, family	49%	+3
Web forums	44%	+2
Travel literature	14%	+4

RESERVATION METHOD		
Booking.com	57%	+17
Airbnb	20%	+7
Directly at the accommodation provider	15%	+3
Organiser	5%	+0
Other web portal	4%	+2

TRAVELLING WITH		
As a couple	42%	+10
Friends	14%	+1
Family	31%	-10
Relatives	3%	+0
Alone	10%	+0

CHARACTERISTICS:

Size*	3,932,358	Summer	65%
Share*	4%	Autumn	21%
Age	41	Shorter trips	1
Women	54%	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.

n=233

RUSSIA: Urban consumers (14.6%)

DESTINATION TYPE		
Cities	**74%**	**+23**
By the sea	82%	-5
Cultural and historical centres	44%	-6
Capitals	32%	+2
Spas (wellness and spa)	10%	-5

TYPE OF ACCOMMODATION		
Hotel	**95%**	**+3**
Staying with relatives or friends	21%	-4
Apartment	31%	-7
Other	1%	+0
Boutique hotel	7%	-4

TRANSPORT TO THE DESTINATION		
Aeroplane	**91%**	**+3**
Coach	**4%**	**+3**
Bicycle	0%	+0
Car	4%	-2
Train	1%	-2

TRANSPORT AT THE DESTINATION		
Coach	63%	+2
On foot	26%	+1
Car	51%	-3
Train	22%	+0
Motorcycle	2%	+0

ACTIVITIES		
Shopping	**67%**	**+26**
Sightseeing of a town, the capital	**73%**	**+13**
Seeing major tourist attractions	**76%**	**+9**
Gastronomy	**46%**	**+12**
Nightlife (bars, clubs)	**31%**	**+16**

MOTIVATION		
Past experience	60%	+1
Recommendations from friends	51%	+0
Popularity of the destination	24%	+0
TV programmes	23%	+0
Web ads	4%	+1

SOURCE OF INFORMATION		
Web forums	43%	+2
Opinions in social media	34%	+2
Blogs	28%	+2
Articles on the Internet	67%	-1
Friends, family	46%	-1

RESERVATION METHOD		
Agency	62%	+0
Agoda.com	5%	+2
Booking.com	39%	-2
Organiser	5%	+0
Expedia.com	3%	+1

TRAVELLING WITH		
Family	42%	+1
As a couple	33%	+1
Friends	15%	+1
Alone	8%	-2
Relatives	2%	-1

CHARACTERISTICS:

Size*	**3,866,496**
Share*	**4%**
Age	**40**
Women	**57%**

Summer	**64%**
Autumn	**19%**
Shorter trips	**1**
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.

n=229

RUSSIA: Beauty and indulgence lovers (10.7%)

DESTINATION TYPE		
By the sea	**98%**	**+11**
Spas (wellness and spa)	**40%**	**+25**
In the mountains	33%	-6
By a lake	20%	-3
Elsewhere in nature	15%	-2

TYPE OF ACCOMMODATION		
Hotel	**96%**	**+5**
Own property (holiday cottage)	**11%**	**+5**
Apartment	27%	-10
Boutique hotel	9%	-2
Staying with relatives or friends	15%	-10

TRANSPORT TO THE DESTINATION		
Aeroplane	**95%**	**+7**
Motorcycle	0%	+0
Car	4%	-2
Train	1%	-2

TRANSPORT AT THE DESTINATION		
Car	**59%**	**+5**
Coach	55%	-6
On foot	18%	-6
Motorhome (camper)	1%	+0
Motorcycle	1%	-2

ACTIVITIES		
Sun and sea	**93%**	**+12**
Activities and fun for children	**53%**	**+29**
Shopping	**58%**	**+16**
Aquafun, amusement parks	**46%**	**+9**
Thermal health spas	**33%**	**+9**

MOTIVATION		
Past experience	65%	+7
Price of the destination	**62%**	**+8**
Popularity of the destination	**28%**	**+4**
Posts on social media, blogs	22%	+0
Proximity of the destination	15%	+1

SOURCE OF INFORMATION		
Agencies	**43%**	**+13**
Friends, family	44%	-3
Opinions in social media	34%	+2
Articles on the Internet	63%	-5
Web forums	39%	-3

RESERVATION METHOD		
Agency	**81%**	**+19**
Own accommodation	4%	+0
Through official TICs	5%	-1
At the activity provider	2%	+0
Directly at the accommodation provider	7%	-5

TRAVELLING WITH		
Family	**68%**	**+27**
Friends	10%	-4
Relatives	3%	+0
As a couple	16%	-16
Alone	2%	-8

CHARACTERISTICS:

Size*	**2,845,776**
Share*	**3%**
Age	**41**
Women	**55%**
Summer	**74%**
Autumn	**15%**
Shorter trips	**1**
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.

n=169

RUSSIA: Relaxed escapists (10.2%)

DESTINATION TYPE		
By the sea	83%	-3
Spas (wellness and spa)	**19%**	**+4**
Zdravilišča	**17%**	**+6**
In the mountains	29%	-9
Cultural and historical centres	29%	-20

TYPE OF ACCOMMODATION		
Hotel	90%	-2
Own property (holiday cottage)	6%	+0
Camp	10%	-2
Glamping	2%	+1
Other	2%	+1

TRANSPORT TO THE DESTINATION		
Car	**13%**	**+7**
Train	**5%**	**+2**
Aeroplane	79%	-9
Coach	2%	+0
Ship or another vessel	1%	+0

TRANSPORT AT THE DESTINATION		
Coach	53%	-8
Car	48%	-6
Motorhome (camper)	**4%**	**+3**
Bicycle	5%	+1
Train	13%	-9

ACTIVITIES		
Thermal health spas	**43%**	**+20**
Natural sights, nature	68%	+3
Gastronomy	34%	+1
Health treatments and services	**27%**	**+6**
Cruises	20%	+0

MOTIVATION		
Past experience	58%	-1
Recommendations from friends	47%	-4
Popularity of the destination	21%	-3
Proximity of the destination	14%	-1
Articles on the Internet	31%	-9

SOURCE OF INFORMATION		
Opinions in social media	30%	-3
Friends, family	40%	-7
Web forums	35%	-7
Agencies	26%	-4
Articles in print media	9%	-1

RESERVATION METHOD		
Agency	63%	+0
Organiser	6%	+1
Booking.com	37%	-4
Own accommodation	4%	+0
Airbnb	10%	-3

TRAVELLING WITH		
Friends	**19%**	**+5**
Family	35%	-6
As a couple	32%	+0
Alone	10%	+0
Relatives	3%	+1

CHARACTERISTICS:

Size*	**2,701,507**
Share*	**3%**
Age	**45**
Women	**60%**
Summer	**61%**
Autumn	**23%**
Shorter trips	**1**
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.

n=160

RUSSIA: Urban conscious (7.3%)

DESTINATION TYPE		
Cities	**74%**	**+23**
Capitals	**56%**	**+27**
Cultural and historical centres	**64%**	**+14**
Zdravilišča	11%	-1
By the sea	67%	-19

TYPE OF ACCOMMODATION		
Hostel	**57%**	**+35**
Private accommodation (e.g. Airbnb)	**46%**	**+18**
Staying with relatives or friends	**32%**	**+8**
Apartment	41%	+4
Camp	**16%**	**+4**

TRANSPORT TO THE DESTINATION		
Aeroplane	89%	+1
Bicycle	**1%**	**+1**
Train	3%	+0
Motorhome (camper)	**1%**	**+1**
Coach	2%	+0

TRANSPORT AT THE DESTINATION		
Coach	**74%**	**+13**
Train	**40%**	**+18**
Bicycle	**6%**	**+2**
Car	51%	-3
On foot	23%	-1

ACTIVITIES		
Museums, galleries and art	**81%**	**+33**
Learning about the local way of life	**75%**	**+41**
Sightseeing of old town centres	**86%**	**+21**
Sightseeing of a town, the capital	**84%**	**+24**
Social events, festivals	**63%**	**+40**

MOTIVATION		
Posts on social media, blogs	**33%**	**+11**
Articles on the Internet	**45%**	**+5**
Price of the destination	58%	+3
Articles in print media	**15%**	**+8**
Past experience	60%	+2

SOURCE OF INFORMATION		
Blogs	**42%**	**+16**
Articles on the Internet	72%	+3
Web forums	**48%**	**+7**
Web portals (TripAdvisor etc.)	**44%**	**+9**
Travel presentations	**13%**	**+5**

RESERVATION METHOD		
Booking.com	**59%**	**+18**
Airbnb	**30%**	**+17**
Directly at the accommodation provider	**18%**	**+6**
Through official TICs	7%	+1
At the activity provider	4%	+2

TRAVELLING WITH		
As a couple	**38%**	**+5**
Friends	**18%**	**+4**
Alone	**16%**	**+6**
Family	27%	-14
Relatives	2%	-1

CHARACTERISTICS:

	1,934,903
Share*	**2%**
Age	**38**
Women	**59%**

Summer	**52%**
Autumn	**24%**
Shorter trips	**1**
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.

n=115

RUSSIA: Carefree youth (3.7%)

DESTINATION TYPE		
By the sea	**92%**	**+5**
Cities	**73%**	**+22**
Capitals	34%	+4
By a lake	14%	-10
Cultural and historical centres	33%	-16

TYPE OF ACCOMMODATION		
Hostel	**72%**	**+50**
Private accommodation (e.g. Airbnb)	**34%**	**+6**
Staying with relatives or friends	**31%**	**+7**
Apartment	33%	-4
Camp	14%	+2

TRANSPORT TO THE DESTINATION		
Train	**8%**	**+5**
Motorhome (camper)	**2%**	**+2**
Car	7%	+1
Ship or another vessel	**1%**	**+1**
Aeroplane	82%	-6

TRANSPORT AT THE DESTINATION		
Coach	62%	+1
Bicycle	5%	+1
On foot	25%	+1
Car	49%	-5
Motorcycle	3%	+1

ACTIVITIES		
Music festivals and concerts	**52%**	**+32**
Sightseeing of a town, the capital	**70%**	**+10**
Sun and sea	81%	+1
Nightlife (bars, clubs)	**34%**	**+19**
Social events, festivals	**32%**	**+9**

MOTIVATION		
Articles on the Internet	43%	+3
Popularity of the destination	26%	+2
Past experience	53%	-6
Recommendations from friends	44%	-7
Travel literature	9%	+0

SOURCE OF INFORMATION		
Friends, family	54%	+7
Web portals (TripAdvisor etc.)	**42%**	**+7**
Articles on the Internet	65%	-3
Articles in print media	8%	-1
Web forums	33%	-8

RESERVATION METHOD		
Own accommodation	11%	+6
Directly at the accommodation provider	14%	+1
At the activity provider	5%	+3
Through official TICs	7%	+1
Organiser	6%	+2

TRAVELLING WITH		
As a couple	**39%**	**+7**
Alone	**20%**	**+10**
Family	29%	-13
Friends	13%	-1

CHARACTERISTICS:

Size*	**976,336**
Share*	**1%**
Age	**36**
Women	**32%**
Summer	**60%**
Autumn	**21%**
Shorter trips	**1**
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.

n=58

RUSSIA: Active nostalgists (2.6%)

DESTINATION TYPE		
In the mountains	**80%**	**+41**
By a lake	**57%**	**+34**
Elsewhere in nature	**46%**	**+29**
By the sea	75%	-11
Countryside	13%	+4

TYPE OF ACCOMMODATION		
Hotel	94%	+3
Boutique hotel	**27%**	**+16**
Private accommodation (e.g. Airbnb)	28%	+1
Tourist farm	5%	+2
Apartment	31%	-6

TRANSPORT TO THE DESTINATION		
Aeroplane	88%	+0
Car	**11%**	**+4**
Motorcycle	**2%**	**+1**

TRANSPORT AT THE DESTINATION		
Car	61%	+6
Motorcycle	9%	+7
Train	20%	-1
Coach	45%	-16
Bicycle	6%	+2

ACTIVITIES		
Gastronomy	**51%**	**+17**
Visit to a wine cellar	**42%**	**+24**
Sports activities	**30%**	**+15**
History and castles	59%	+1
Natural sights, nature	60%	-5

MOTIVATION		
Recommendations from friends	54%	+4
Suitability of the destination in all seasons	26%	+0
Past experience	49%	-9
Proximity of the destination	10%	-4
Travel literature	8%	-1

SOURCE OF INFORMATION		
Friends, family	53%	+6
Web forums	33%	-8
Agencies	27%	-3
Other	3%	+2
Opinions in social media	23%	-9

RESERVATION METHOD		
Own accommodation	9%	+5
Through official TICs	8%	+2
Agency	56%	-6
Other	3%	+2
Airbnb	9%	-4

TRAVELLING WITH		
Alone	**21%**	**+11**
As a couple	**42%**	**+10**
Relatives	**6%**	**+4**
Family	19%	-22
Friends	11%	-3

CHARACTERISTICS:

Size*	**685,074**
Share*	**1%**
Age	**40**
Women	**31%**

Summer	**62%**
Autumn	**24%**
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.

n=41

RUSSIA: Active families (1.4%)

DESTINATION TYPE		
In the mountains	**89%**	**+50**
By a lake	**72%**	**+49**
Elsewhere in nature	**71%**	**+53**
By the sea	83%	-4
Countryside	**26%**	**+16**

TYPE OF ACCOMMODATION		
Apartment	**61%**	**+24**
Tourist farm	**27%**	**+25**
Hostel	**38%**	**+16**
Camp	**27%**	**+15**
Camper	**16%**	**+14**

TRANSPORT TO THE DESTINATION		
Train	6%	+3
Ship or another vessel	**5%**	**+5**
Aeroplane	86%	-2
Car	3%	-3

TRANSPORT AT THE DESTINATION		
Coach	71%	+10
Train	**38%**	**+16**
Bicycle	**14%**	**+10**
Car	57%	+3
On foot	33%	+9

ACTIVITIES		
Sports activities	**66%**	**+51**
Water sports activities	**52%**	**+44**
Mountaineering (more challenging tours)	**36%**	**+33**
Winter sports	**43%**	**+32**
Learning about the local way of life	**47%**	**+13**

MOTIVATION		
Articles on the Internet	**54%**	**+15**
Posts on social media, blogs	28%	+5
Past experience	56%	-3
Videos on the Internet	24%	+5
Web ads	8%	+6

SOURCE OF INFORMATION		
Articles on the Internet	**79%**	**+11**
Web forums	51%	+10
Travel presentations	**33%**	**+26**
Blogs	34%	+8
Friends, family	37%	-10

RESERVATION METHOD		
Airbnb	**38%**	**+25**
Booking.com	**56%**	**+15**
Through official TICs	17%	+11
Expedia.com	11%	+8
Agoda.com	11%	+7

TRAVELLING WITH		
Family	43%	+2
As a couple	39%	+6
Friends	19%	+5

CHARACTERISTICS:

	369,392
Share*	**0.4%**
Age	**38**
Women	**50%**

Summer	**49%**
Autumn	**14%**
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.

n=22

RUSSIA: Adventurists (1.3%)

DESTINATION TYPE		
In the mountains	**69%**	**+31**
By a lake	**47%**	**+24**
Elsewhere in nature	**38%**	**+21**
By the sea	65%	-21
Countryside	10%	+1

TYPE OF ACCOMMODATION		
Camp	**39%**	**+27**
Camper	**37%**	**+35**
Hostel	**40%**	**+19**
Tourist farm	**15%**	**+13**
Hotel	72%	-20

TRANSPORT TO THE DESTINATION		
Motorcycle	**5%**	**+4**
Aeroplane	89%	+1
Ship or another vessel	**2%**	**+2**
Car	4%	-2

TRANSPORT AT THE DESTINATION		
Car	**81%**	**+27**
Bicycle	**8%**	**+4**
On foot	18%	-6
Coach	35%	-26
Motorcycle	5%	+2

ACTIVITIES		
Adrenaline sports challenges	**51%**	**+46**
History and castles	**75%**	**+18**
Water sports activities	**38%**	**+30**
Social events, festivals	31%	+9
Natural sights, nature	63%	-2

MOTIVATION		
Popularity of the destination	**34%**	**+10**
Posts on social media, blogs	**34%**	**+11**
Recommendations from friends	52%	+1
Suitability of the destination in all seasons	30%	+4
Proximity of the destination	17%	+3

SOURCE OF INFORMATION		
Articles in print media	**28%**	**+18**
Articles on the Internet	59%	-9
Friends, family	37%	-10
Travel presentations	**15%**	**+8**
Opinions in social media	20%	-13

RESERVATION METHOD		
Airbnb	20%	+7
Agency	62%	+0
Own accommodation	5%	+0
Agoda.com	4%	+1
At the activity provider	4%	+1

TRAVELLING WITH		
Family	**54%**	**+13**
Alone	**23%**	**+13**
Friends	19%	+5
As a couple	4%	-28

CHARACTERISTICS:

Size*	**357,840**
Share*	**0.4%**
Age	**33**
Women	**49%**

Summer	**76%**
Autumn	**7%**
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.

n=21

RUSSIA: Devoted mothers (1.2%)

DESTINATION TYPE		
By a lake	**66%**	**+42**
In the mountains	**59%**	**+21**
Countryside	**16%**	**+7**
By the sea	64%	-23
Cultural and historical centres	34%	-15

TYPE OF ACCOMMODATION		
Camp	**35%**	**+23**
Apartment	**56%**	**+19**
Staying with relatives or friends	**35%**	**+11**
Tourist farm	**9%**	**+7**
Boutique hotel	15%	+4

TRANSPORT TO THE DESTINATION		
Car	**13%**	**+7**
Motorhome (camper)	**6%**	**+5**
Coach	4%	+3
Aeroplane	74%	-14
Train	3%	+0

TRANSPORT AT THE DESTINATION		
Car	59%	+5
Motorcycle	5%	+2
Coach	47%	-14
Train	15%	-7
Bicycle	3%	+0

ACTIVITIES		
Sports activities	**43%**	**+27**
Aquafun, amusement parks	**48%**	**+11**
Fishing	**34%**	**+22**
Recreation	**24%**	**+13**
Countryside, farm activities	**21%**	**+17**

MOTIVATION		
Past experience	63%	+5
Proximity of the destination	24%	+10
Articles on the Internet	40%	+0
Travel literature	15%	+6
TV programmes	21%	-1

SOURCE OF INFORMATION		
Travel presentations	**18%**	**+10**
Friends, family	38%	-9
Articles on the Internet	57%	-11
Opinions in social media	27%	-5
Blogs	21%	-5

RESERVATION METHOD		
Own accommodation	16%	+12
Agency	58%	-4
Through official TICs	12%	+6
At the activity provider	8%	+5
Agoda.com	3%	+0

TRAVELLING WITH		
Family	47%	+5
As a couple	34%	+1
Friends	13%	-1
Alone	7%	-3

CHARACTERISTICS:

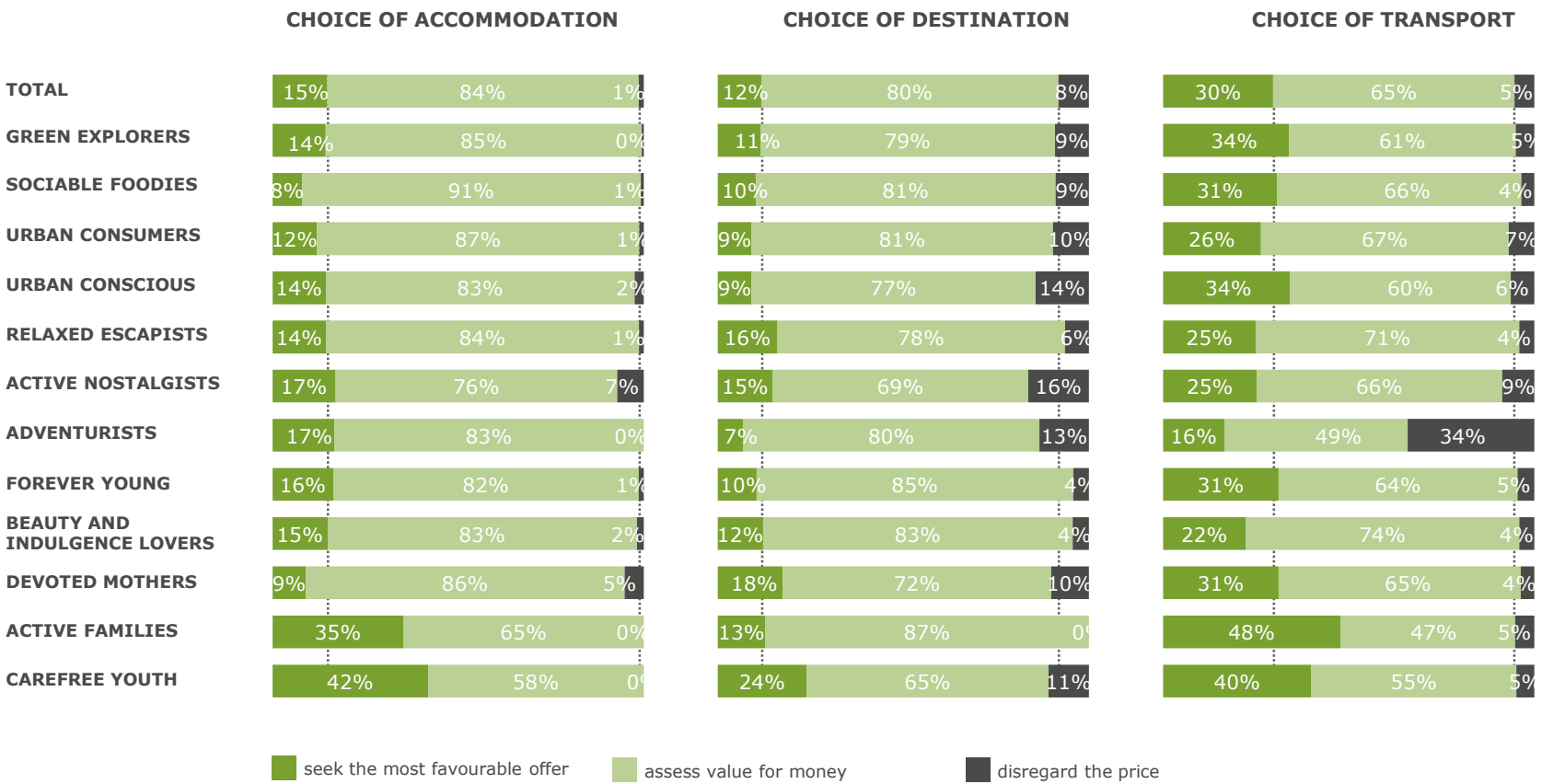
	321,445
Share*	**3%**
Age	**43**
Women	**16%**

Summer	**76%**
Autumn	**19%**
Shorter trips	**2**
Longer trips	**1**

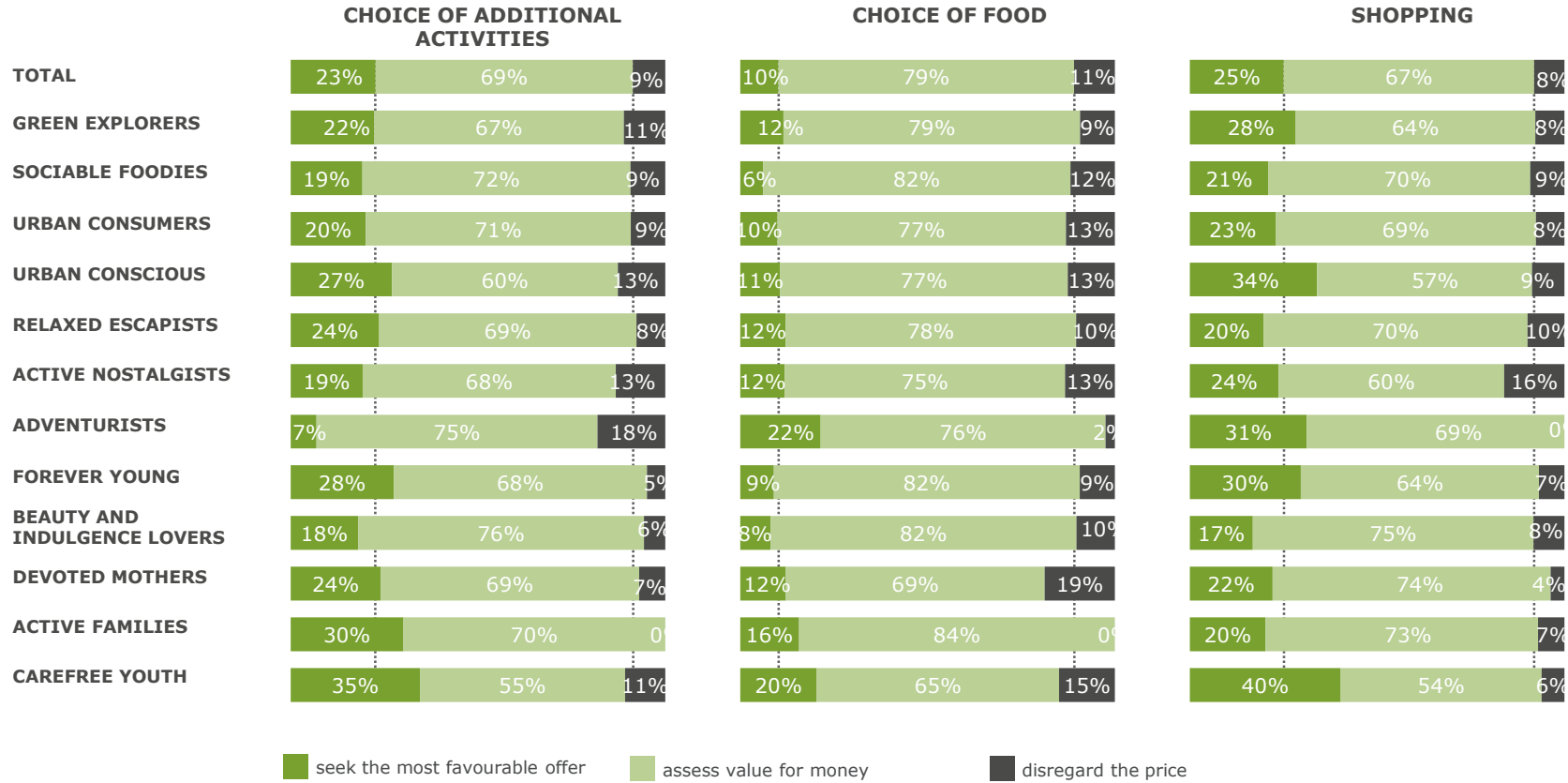
NOTES: Percentages in the title show the share of the segment according to the entire target group (they travel abroad for a break or holiday). / DATA IN TABLES: positive and statistically significant differences are bold and underlined. The first number shows the percentage of replies for an individual 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.

n=19

RUSSIA: Price sensitivity

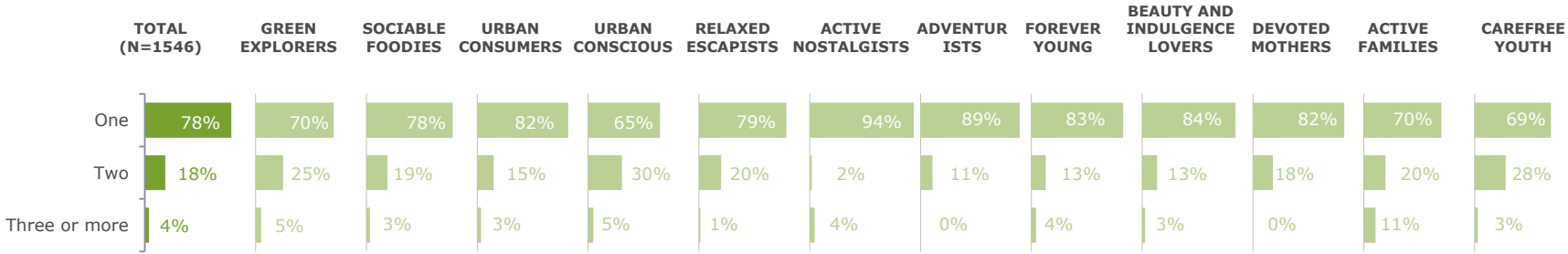


RUSSIA: Price sensitivity

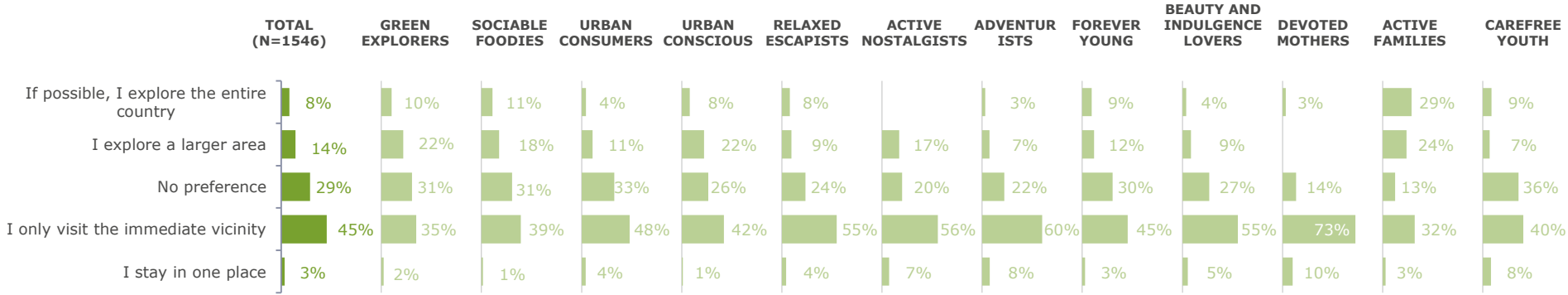


RUSSIA: Level of exploration

Number of countries visited during one trip, break or holiday



Exploring in one country



GENERAL OVERVIEW OF TRAVEL HABITS, MOTIVES AND THE PURCHASE JOURNEY

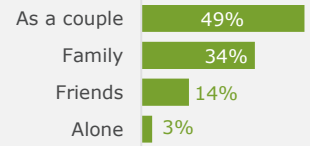
RUSSIA: General travel habits and motives

CHARACTERISTICS OF THE TARGET GROUP:

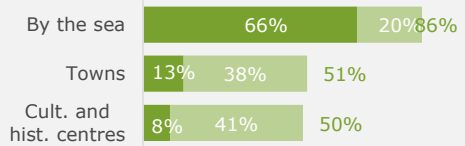
Size	26,540,211
Proportion	27.2%
Age	41
Women	54%

Summer	64%
Autumn	21%
Shorter trips	1
Longer trips	1

TRAVELLING WITH:

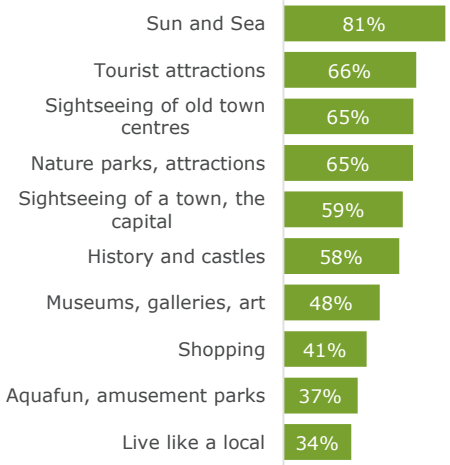


DESTINATION TYPE:

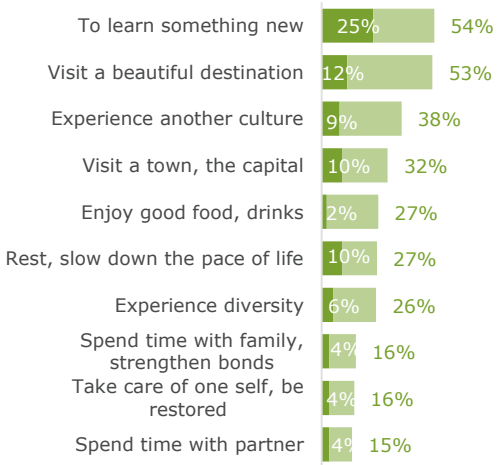


2x a year travels abroad

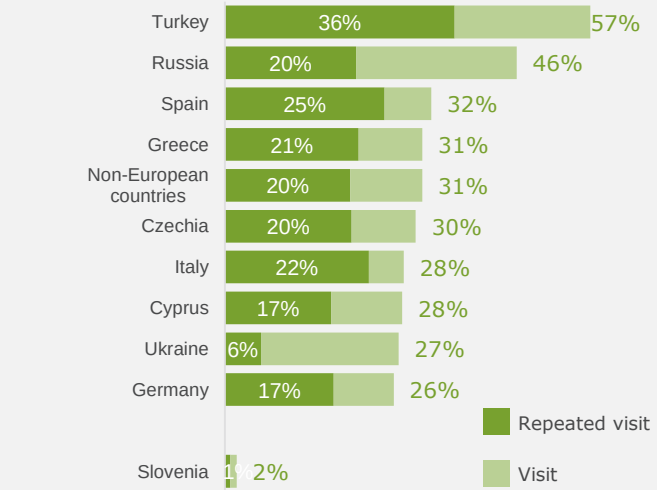
ACTIVITIES – TOP 10:



TRAVEL MOTIVES – TOP 10:



VISITING COUNTRIES – TOP 10:



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).

RUSSIA: Elements of the purchase journey and consumption

TYPE OF ACCOMMODATION:

91% 37% 28%

Other frequent accommodation types:

Relatives, friends: 24%
Hostel: 22%
Camp: 12%

RESERVATION

UP TO 3 months in advance

85%

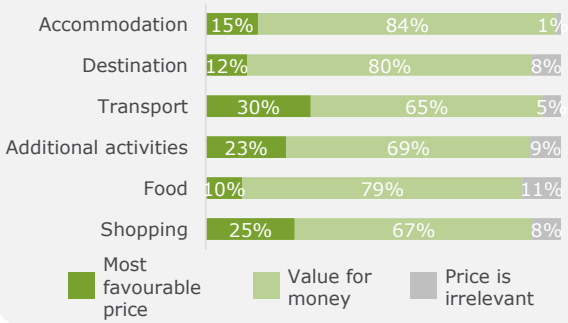
TRANSPORT MODE (%):

AIRPLANE	CAR	TRAIN	COACH
88	6	3	2
-	54	22	61

To the destination

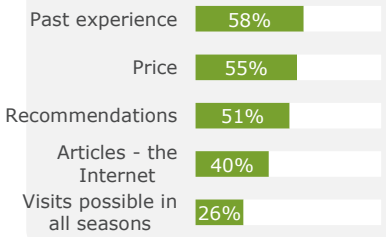
At the destination **(24% ON FOOT, 4% BICYCLE, 2% MOTORCYCLE)**

PRICE SENSITIVITY:

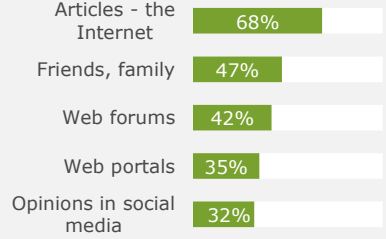


PURCHASE JOURNEY:

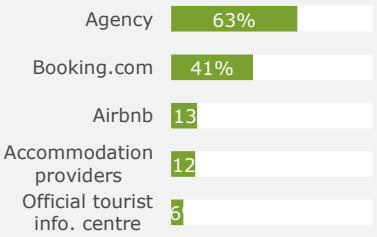
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other *per person/day*	**€27**	**€28**
TRANSPORT *per person*	**€65**	**€68**

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.

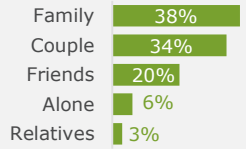
RUSSIA: General travel habits and motives

Subsample: visitors to Slovenia

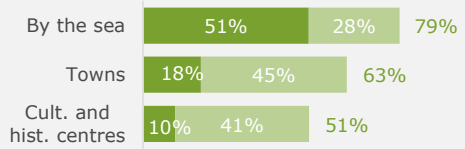
CHARACTERISTICS OF VISITORS TO SLOVENIA:

Size	2,183,667	Summer	64%
Proportion	2.2%	Autumn	15%
Age	42	Shorter trips	2
Women	58%	Longer trips	2

TRAVELLING WITH:

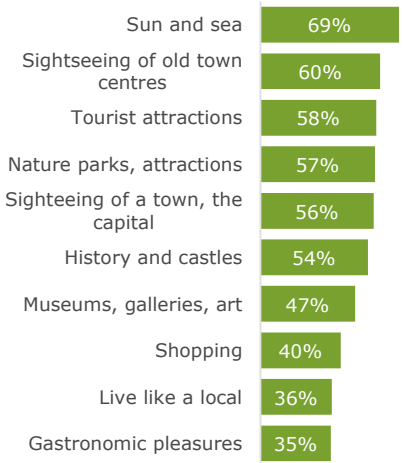


DESTINATION TYPE:



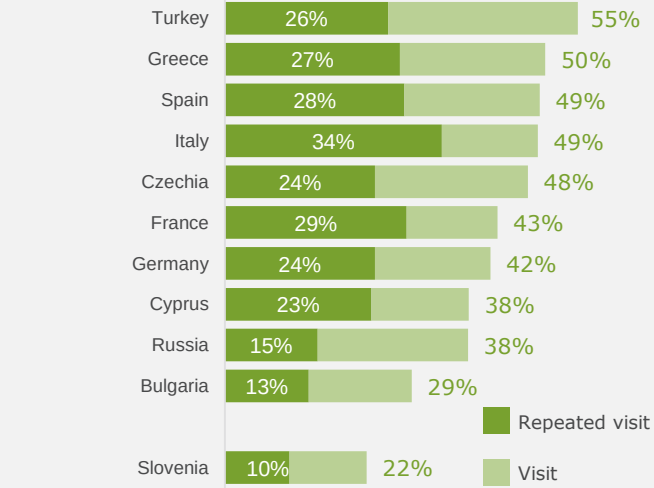
4x a year travels abroad

ACTIVITIES – TOP 10:



TRAVEL MOTIVES – TOP 10:

VISITING COUNTRIES – TOP 10:



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).

RUSSIA: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia

TYPE OF ACCOMMODATION:

HOTEL 88% | 41% | 29%

Other frequent accommodation types:

Private accommodation: 25%
Relatives, friends: 21%
Camp: 20%

RESERVATION

UP TO 3 months in advance

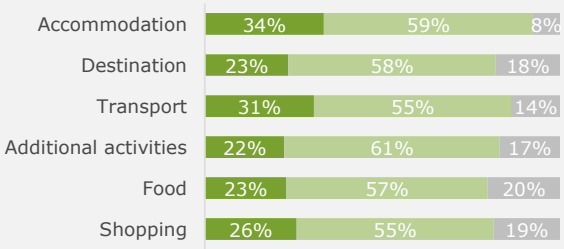
83%

TRANSPORT MODE (%):

	AIRPLANE	CAR	MOTORHOME	COACH	MOTORCYCLE
To the destination	85	10	3	1	1
At the destination	-	68	2	51	4

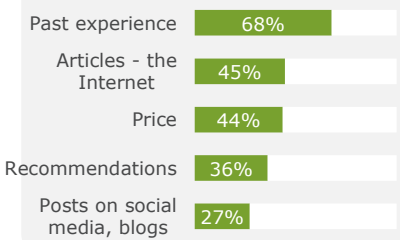
At the destination **(34% TRAIN, 24% ON FOOT, 6% BICYCLE)**

PRICE SENSITIVITY:

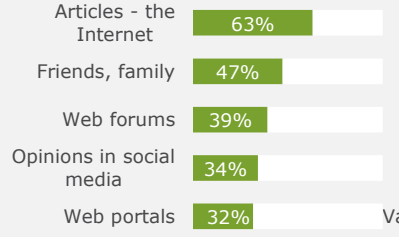


PURCHASE JOURNEY:

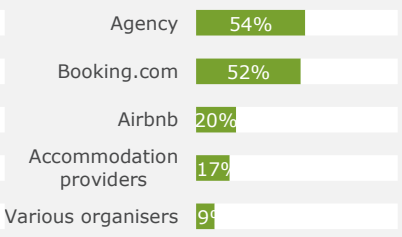
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other *per person/day*	**€29**	**€32**
TRANSPORT *per person*	**€58**	**€62**

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.

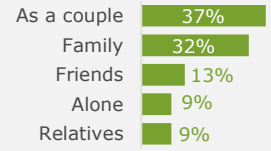
RUSSIA: General travel habits and motives

Subsample: tourists in Slovenia

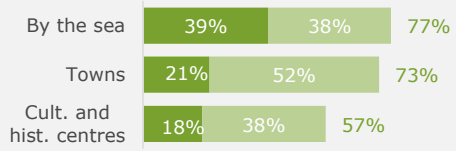
CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size	486,324	Summer	66%
Proportion	0.5%	Autumn	15%
Age	46	Shorter trips	2
Women	65%	Longer trips	2

TRAVELLING WITH:

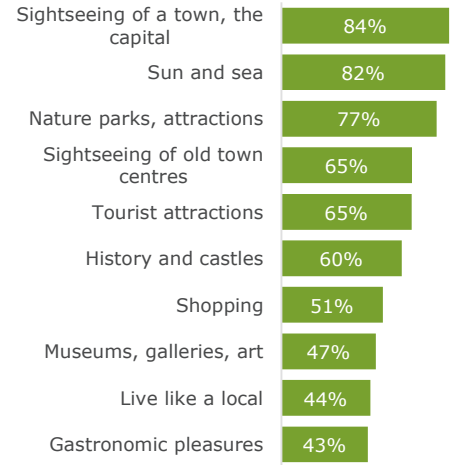


DESTINATION TYPE:

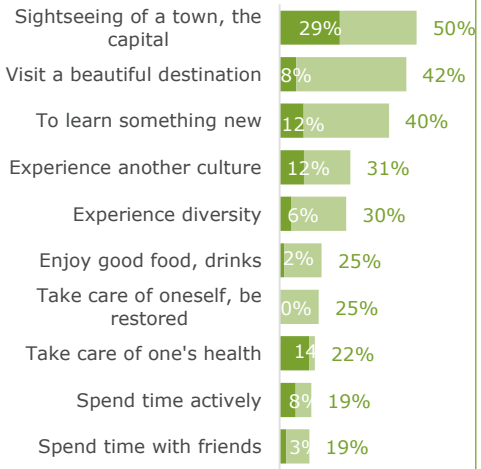


4x a year travels abroad

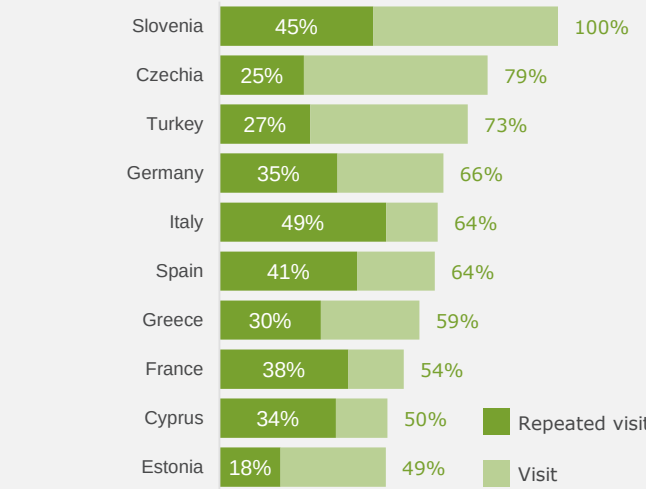
ACTIVITIES – TOP 10:



TRAVEL MOTIVES – TOP 10:



VISITING COUNTRIES – TOP 10:



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).

RUSSIA: Elements of the purchase journey and consumption

Subsample: tourists in Slovenia

TYPE OF ACCOMMODATION:

HOTEL 90% | 40% | 33%

Other frequent accommodation types:

Hostel: 31%
Private accommodation: 26%
Boutique hotel: 22%

RESERVATION

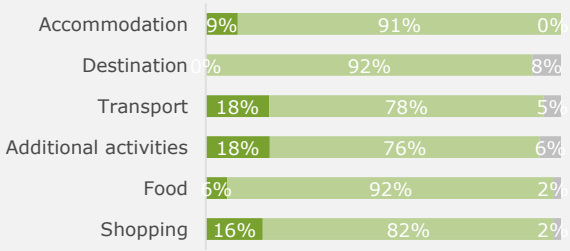
UP TO 3 months in advance

79%

TRANSPORT MODE (%):

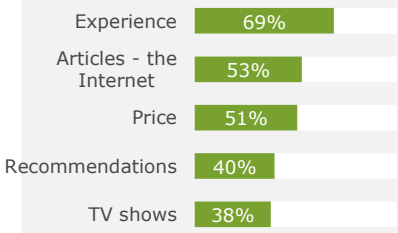
	AIRPLANE	CAR	MOTORCYCLE	MOTORHOME
To the destination	91	5	2	2
At the destination (52% TRAIN, 49% COACH, 23% ON FOOT)	-	66	2	-

PRICE SENSITIVITY:

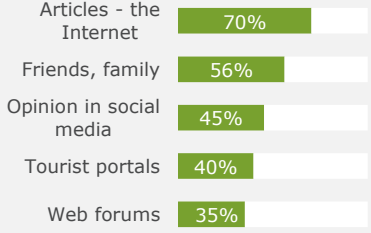


PURCHASE JOURNEY:

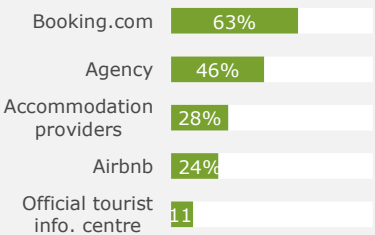
MOTIVATIONS:



SOURCES OF INFORMATION:



RESERVATION METHOD:



BUDGET AND SPENDING:

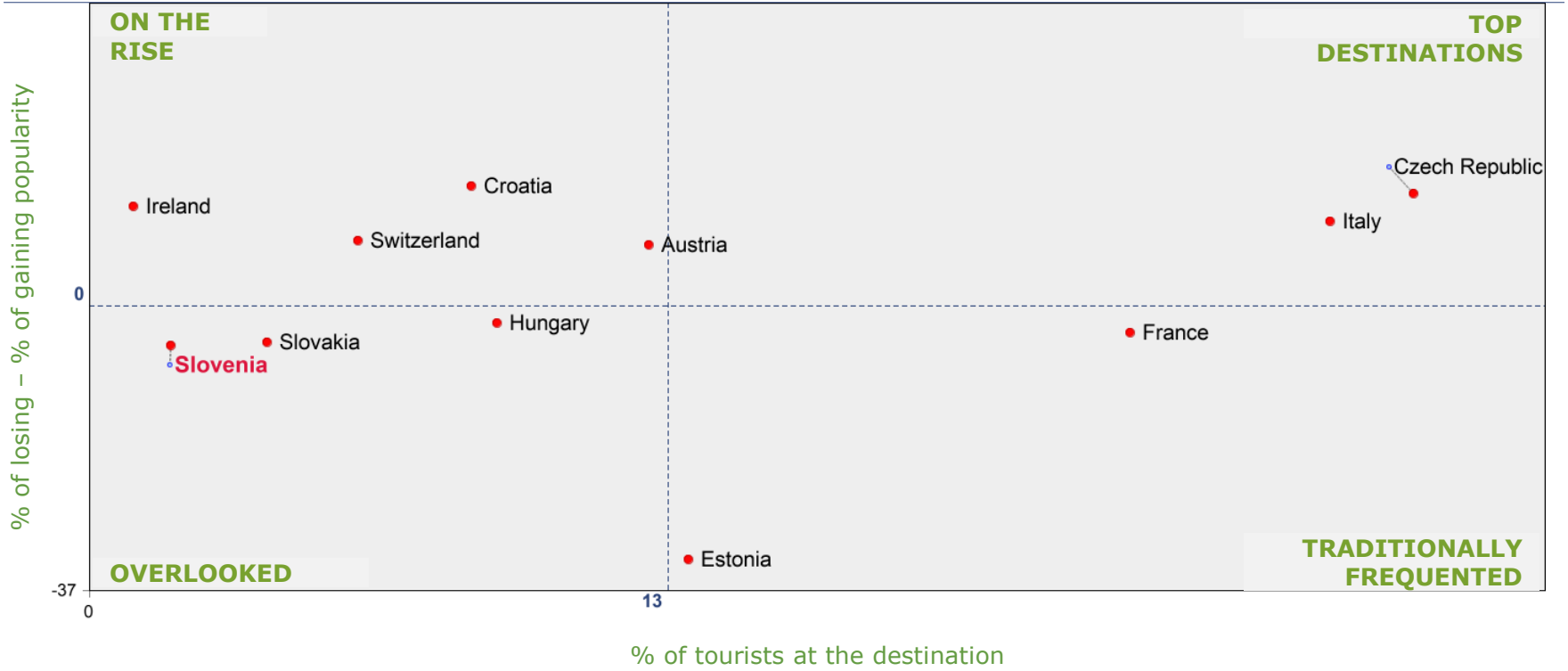
		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other *per person/day*	in Europe	€34	€32
	in SLO	€44	€ 44
TRANSPORT *per person*	in Europe	€71	€73
	in SLO	€139	€151

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

RUSSIA: Destination relevance

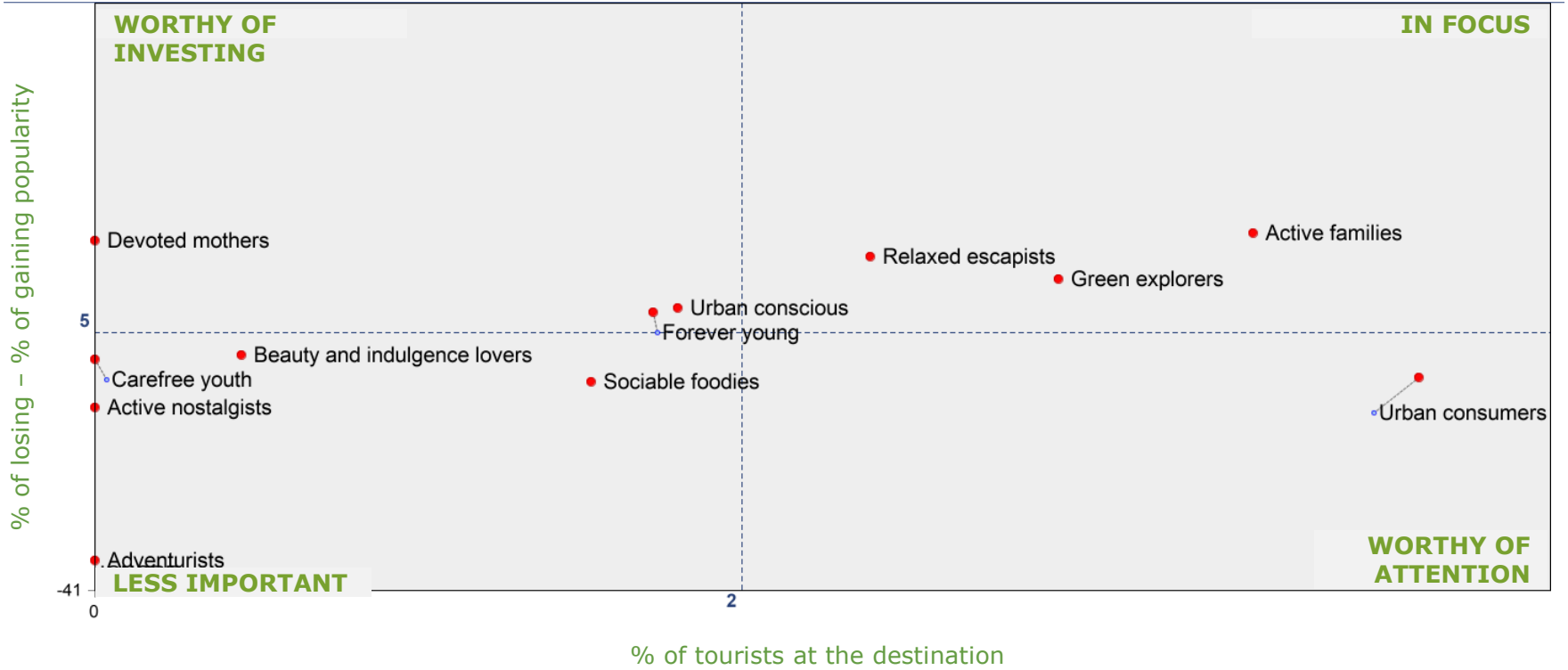
Share of visitors by popularity of the destination



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).

RUSSIA: 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).

RUSSIA: Slovenia's image

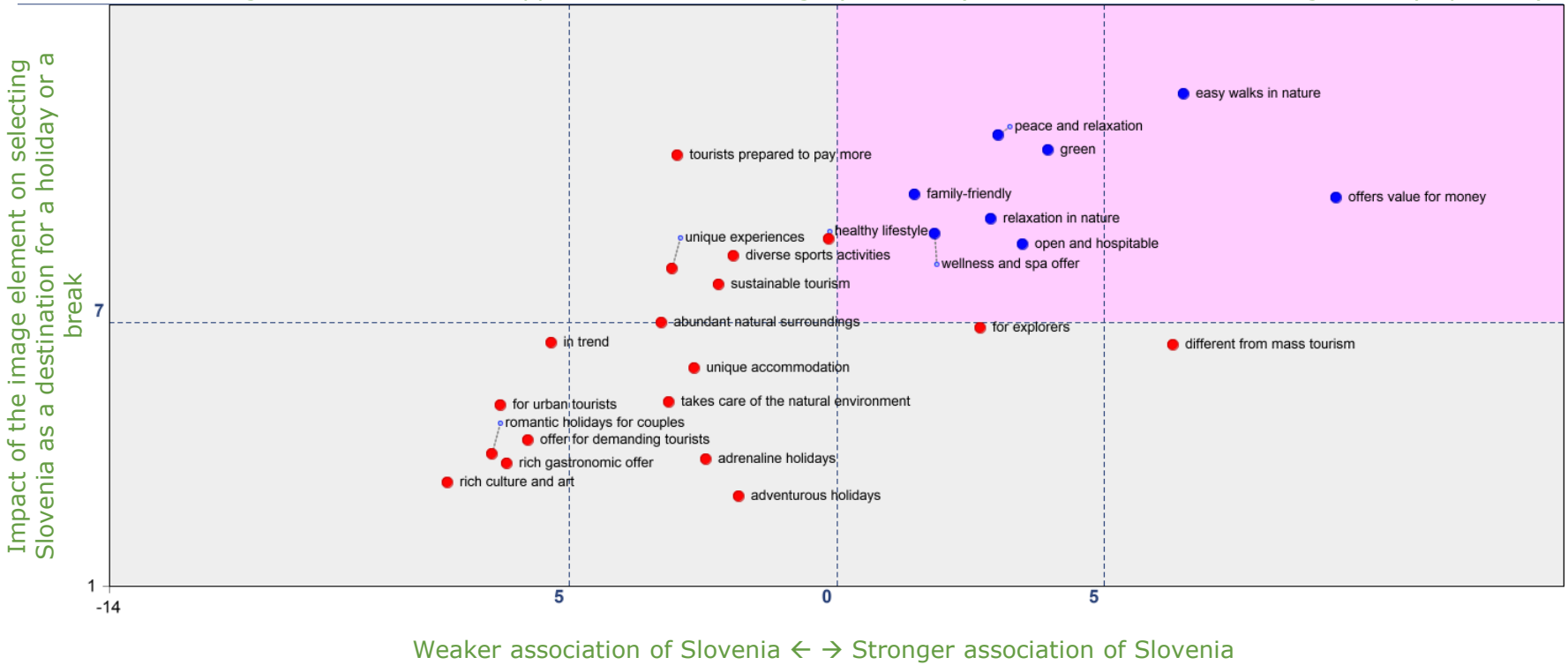
Basis: Entire sample

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.

RUSSIA: 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.

RUSSIA: Image

Subsample: tourists in Slovenia

Relevance of the brand

gaining popularity 24 %

losing popularity 12 %

Warning: low numerus

Basis: Tourists in Slovenia

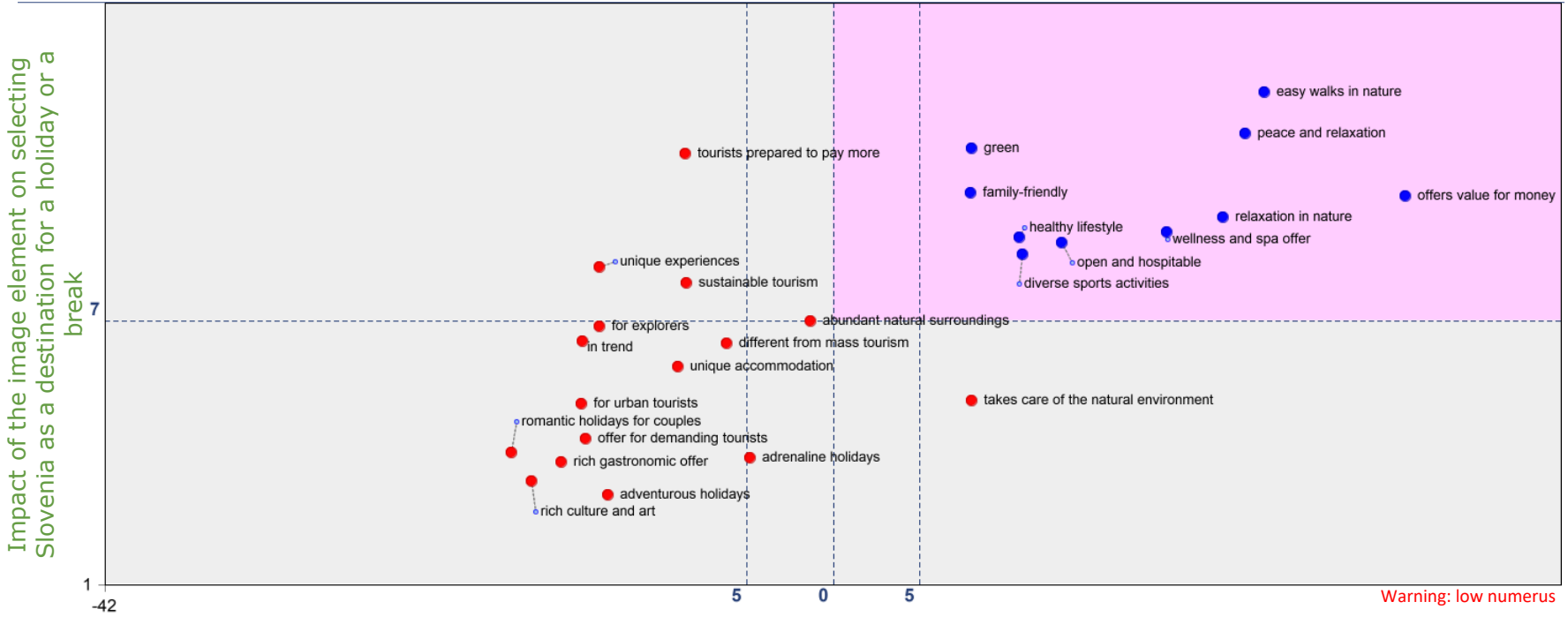
NOTES: The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined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

RUSSIA: 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

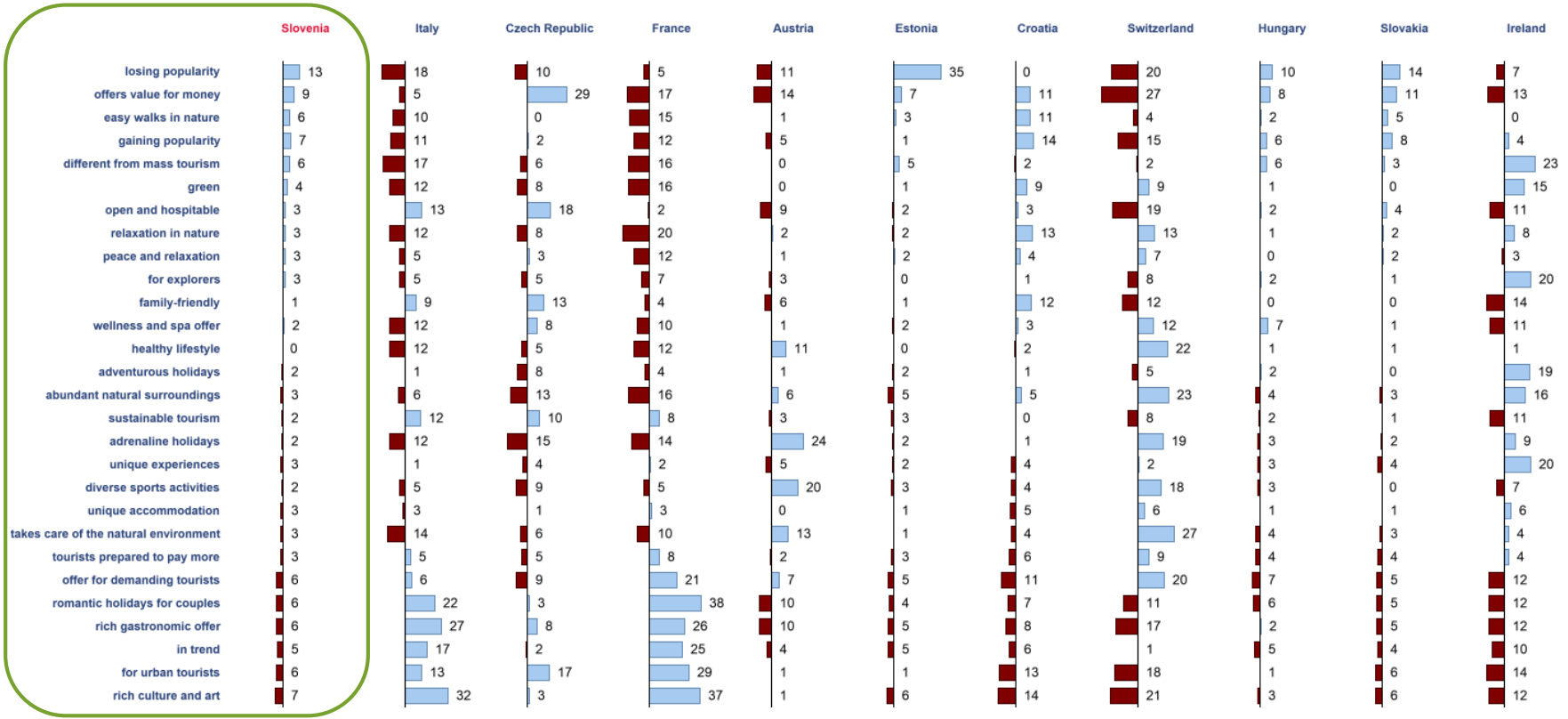
Basis: tourists in Slovenia

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.

RUSSIA: 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.

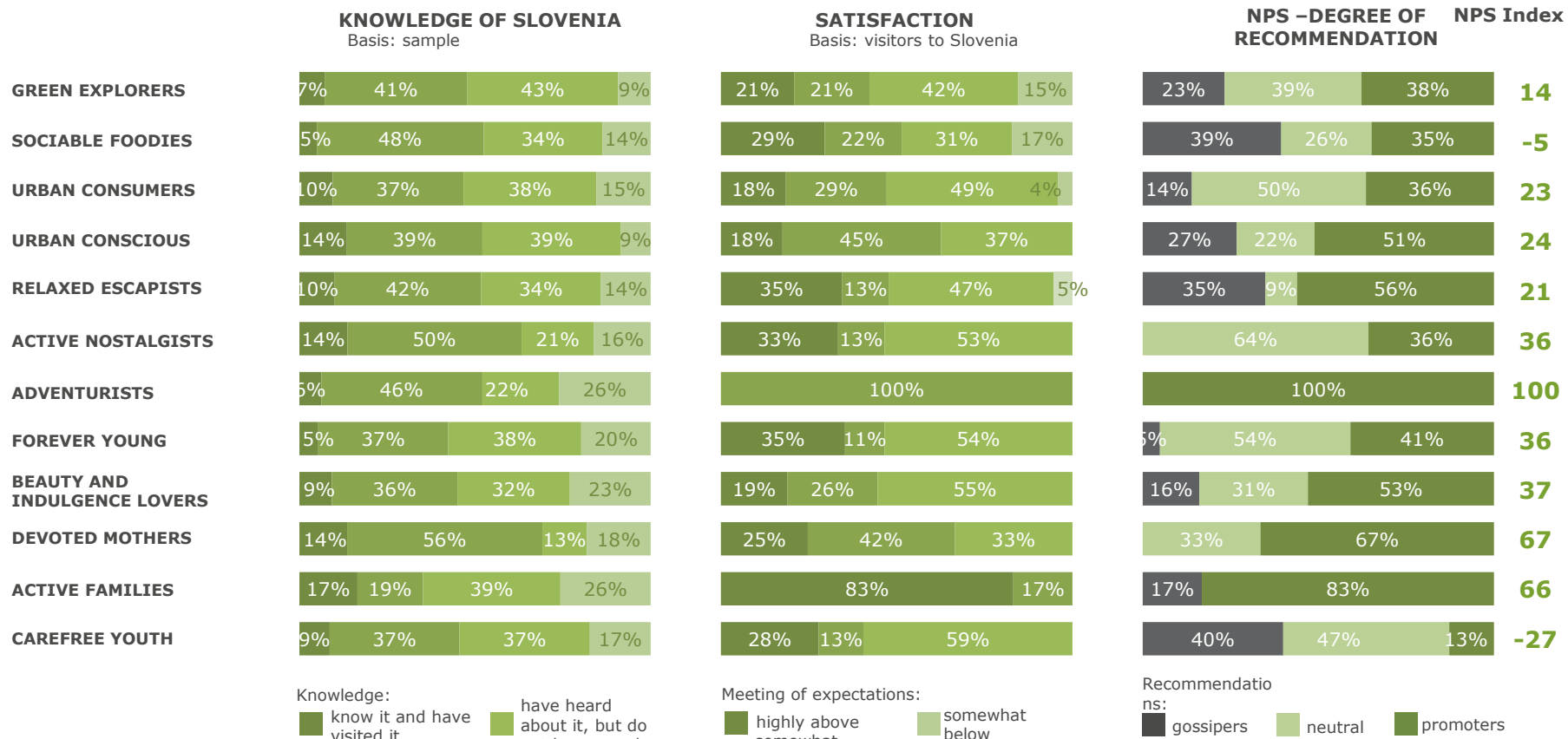
RUSSIA: Typical elements of destinations



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

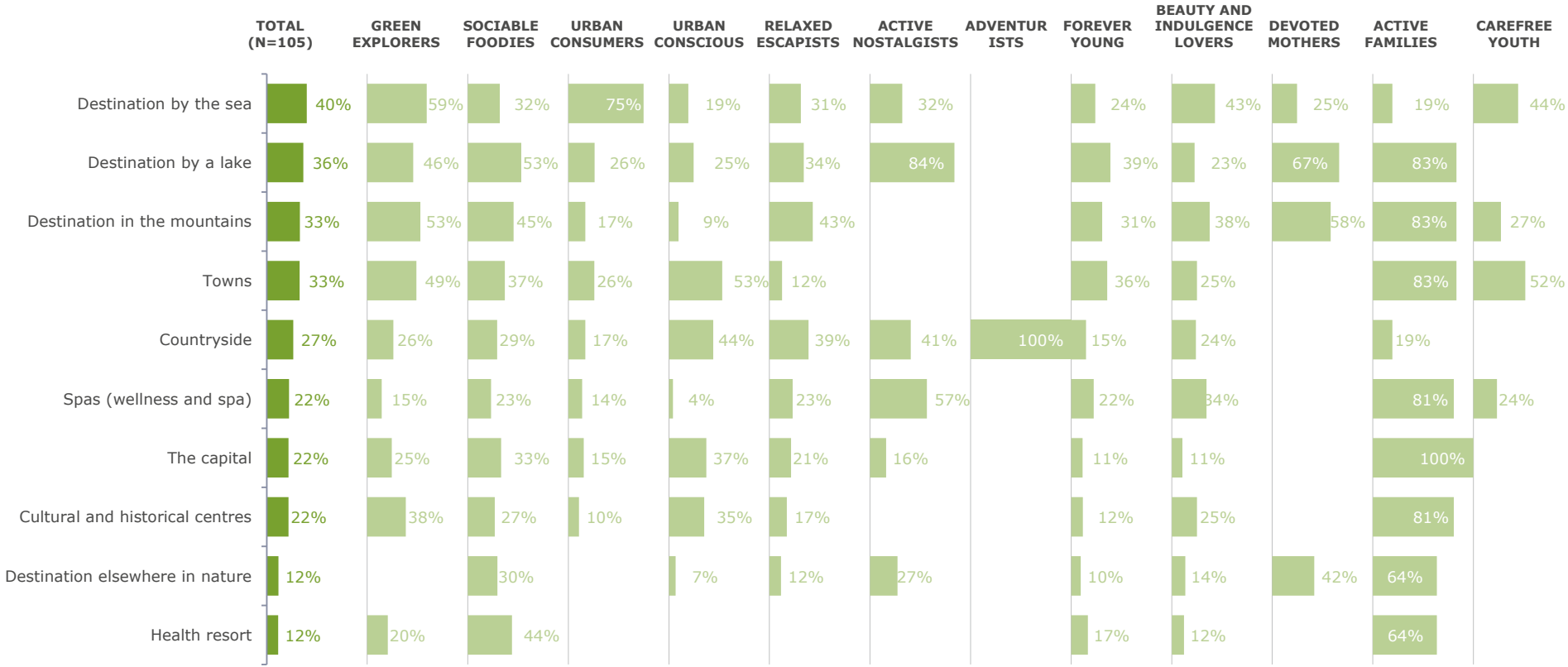
RUSSIA: Knowledge of, and experience with, Slovenia



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.

RUSSIA: Destination type in Slovenia

Subsample: visitors to Slovenia



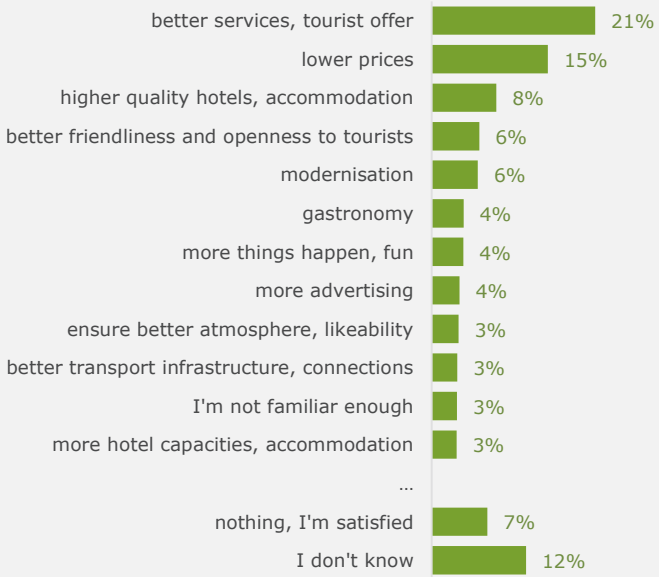
NOTES: Replies are presented on a subsample of visitors to Slovenia who would visit it again. The chart includes types of tourist destinations which visitors to Slovenia would choose if they visit it again. Several replies were possible.

RUSSIA: Opportunities for improvement and elements of excitement

Subsample: visitors to Slovenia

Opportunities for improvement – Top 12

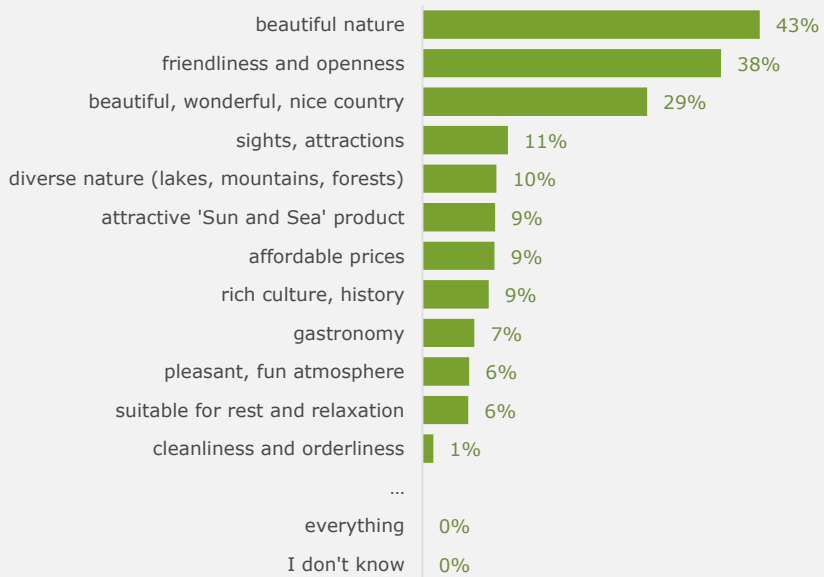
Gossipers and neutral (would not recommend Slovenia), n=72



NOTES: OTHER STATEMENTS: knowledge of foreign languages, more attractions, sights, better cleanliness and orderliness, preservation of safety, different social and political attitude, more sports activities

Elements of excitement – Top 12

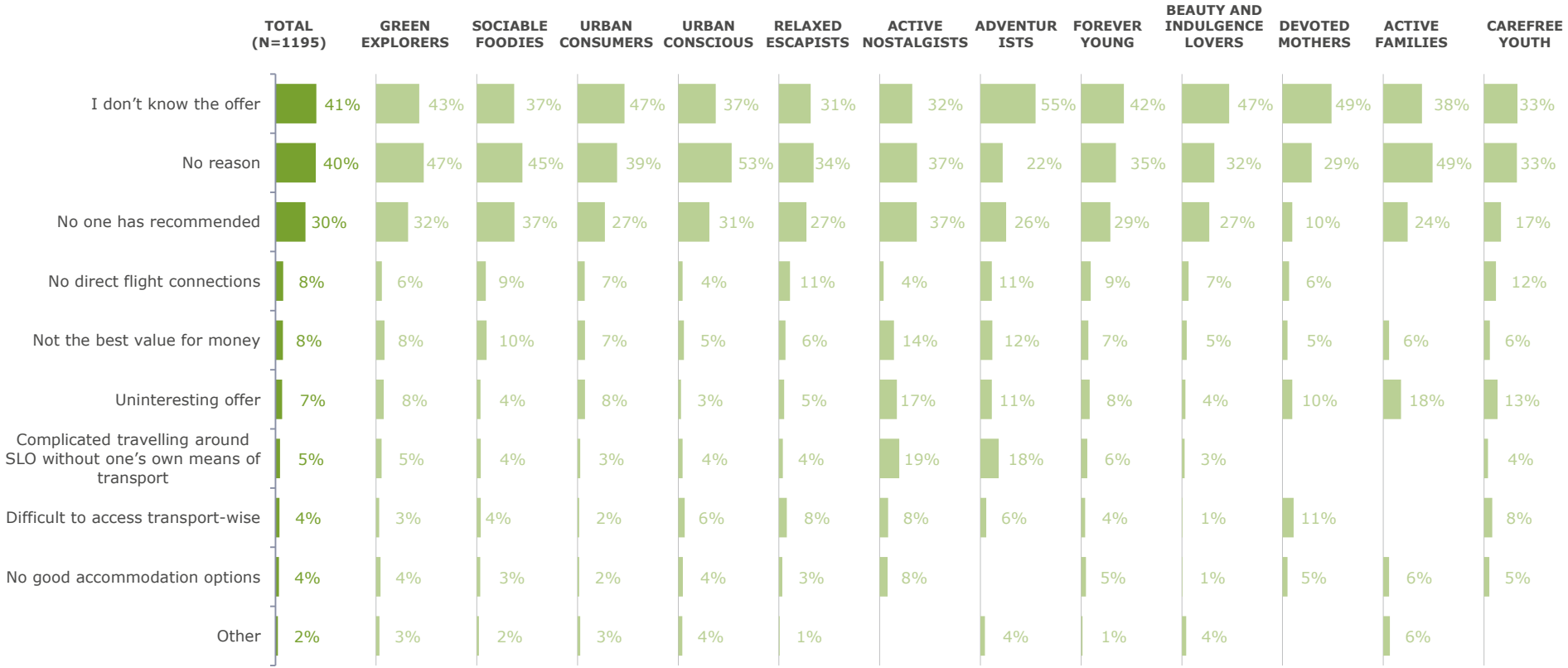
Promoters (would recommend Slovenia), n=58



NOTES: OTHER STATEMENTS: good and high-quality service

RUSSIA: 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

RUSSIA: Green explorers (14.8%)

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

Cultura…	74%	+24

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

TYPE OF ACCOMMODATION

Apartme…	65%	+28

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

TRANSPORT TO THE DESTINATION

Car	7%	+1

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

TRANSPORT AT THE DESTINATION

On foot	35%	+11

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

ACTIVITIES

Natural sights, nature	84%	+20
Sightseei… old town ce…	81%	+16

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

MOTIVATION

Price of the destinatio…	63%	+8
Articles o… Internet	51%	+11

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

SOURCE OF INFORMATION

Articles on the Internet	74%	+5
Web porta… (TripAdv…	41%	+6

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

RESERVATION METHOD

Booking.com	57%	+17
Airbnb	20%	+7
Directly … accomm…	15%	+3

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

TRAVELLING WITH

As a couple	42%	+10
Friends	14%	+1
Family	31%	-10
Relative…	3%	+0

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

CHARACTERISTICS:

Size*	3,957,665
Share*	4%
Age	41
Women	54%
Summer	65%
Autumn	21%
Shorter trips	1
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.

n=233

RUSSIA: 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.

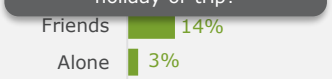
CHARACTERISTICS OF THE TARGET GROUP:

Size	26,711,01		64%
Proportion	27%		21%
Age	41		1
Women	54%	Longer trips	1

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

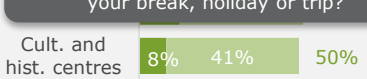
TRAVELLING WITH:

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



DESTINATION TYPE:

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

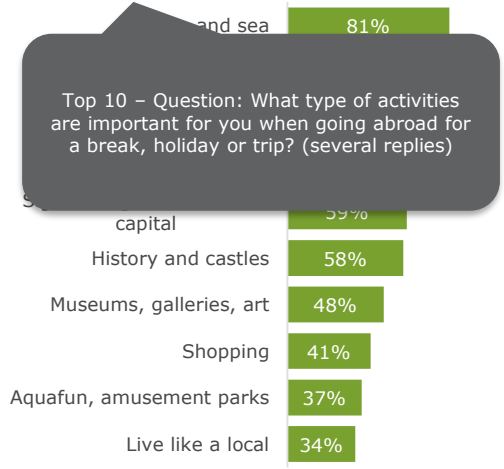


2x year

Frequency of travelling abroad irrespective of the length

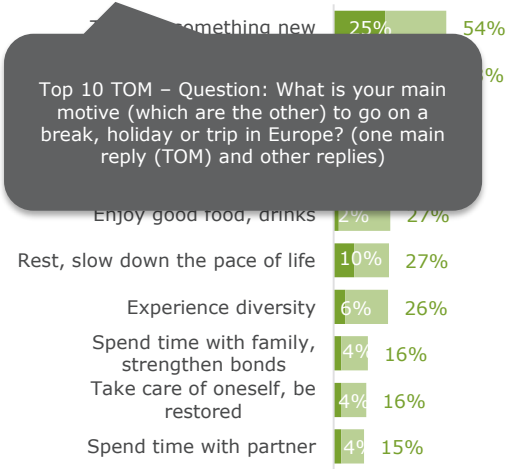
ACTIVITIES – TOP 10:

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



TRAVEL MOTIVES:

Top 10 TOM – Question: What is your main motive (which are the other) to go on a break, holiday or trip in Europe? (one main reply (TOM) and other replies)



VISITING COUNTRIES:

Top 10 – VISITING OF COUNTRIES AND THE INTENTION OF VISITING AGAIN, whereby a selection of European countries was provided in detail. – Question: In which countries have you stayed at least two nights for a break, holiday or trip? Would you revisit any of the countries in which you have already stayed? The replies were compared with Slovenia. (several replies)

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

RUSSIA: 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 TRAIN COACH

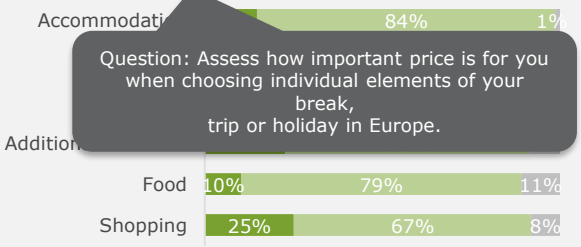
88

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 **(24% ON FOOT, 4% BICYCLE, 2% MOTORCYCLE)**

PRICE SENSITIVITY:

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



PURCHASE JOURNEY:

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)

MOTIVATION		SOURCES OF		RESERVATION METHOD:	
Past					
Recommendations	51%	Web forums	42%	Airbnb	13
Articles - the Internet	40%	Web portals	35%	Accommodation providers	12
Visits are possible in all seasons	26%	Opinions in social media	32%	Official tourist info. centre	5

BUDGET AND SPENDING:

	PLANNED	ACTUAL
A		
C		
o		
p		
T		
per		

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.

STO
SLOVENSKA TURISTIČNA ORGANIZACIJA

I FEEL SLOVENIA

VALICON TOURISM

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

VALICON Zagreb
Baruna Trenka16
10000 Zagreb
T: +385 1 640 99 55
F: +385 1 640 99 56
info@valicon.hr

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

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