



# IDENTIFICATION OF MARKET POTENTIAL

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

UK

December 2017



## Contracting Authority

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**Name:** Slovenian Tourist Board

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

**Contact:** Barbara Zmrzlikar

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## Contractor

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

**Address:** Kopitarjeva 2, 1000 Ljubljana

**Contact:** Zenel Batagelj

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### STATEMENT ON THE PROTECTION OF RESPONDENTS' PERSONAL DATA

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

# INTRODUCTION





**8**  
countries



REPRESENTATIVE SAMPLE

**23.647**

respondents



**12.380**

representatives of  
the target group



**2.771**

tourists and visitors  
to Slovenia

**12**  
PERSONAS



**T = 19:15**

Average duration of the survey



**14 November – 5 December 2017**

Period of data collection

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

**VALICON**

Global provider of web panels:

**research  
now®**

# About the project

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

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





# Content of the survey

The survey was used to examine:

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



# Substantive sets according to the level of analysis

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

## ENTIRE TARGET GROUP

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

## VISITORS TO SLOVENIA (subsample 1)

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

## TOURISTS IN SLOVENIA (subsample 2)

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

## DISPLAY OF RESULTS:

- General **travel habits** and **motives**
- **Elements of the purchase journey** and **consumption**

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

- **market structure** (personas)

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

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



# About the Contractor

## VALICON

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

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

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





# Panel presentation

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

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



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



2017 TOP 50  
INNOVATIVE  
COMPANY

RESEARCH NOW  
RANKED #6

# METHODOLOGY





# Methodological framework of the survey

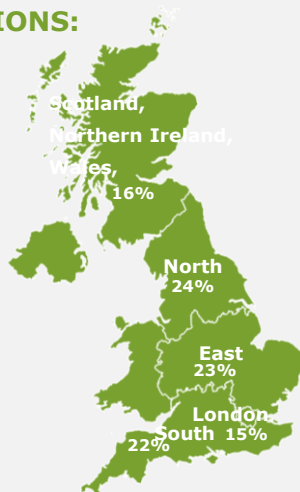


<b>Method of implementation</b>	Web survey, the CAWI method (Computer Assisted Web Interviewing), Valicon in cooperation with web panels of the Research Now company.
<b>Country of implementation</b>	UK
<b>Implementation period</b>	20 November – 27 November 2017
<b>Target group</b>	Citizens of a certain country, who <u>travel abroad at least once a year for a break, holiday, or a trip and spend at least two nights there.</u>
<b>Sample</b>	Entire sample: n=2,458 Target group: n=1,543 Visitors to Slovenia: n=278 Tourists in Slovenia: n=49
<b>Representativeness</b>	A target person was selected from the sample framework, which was representative of the population aged between 18 and 65. The data were weighted according to gender, age and region.
<b>Survey length</b>	Average duration of the survey: t=17:26.



## UK: Sample demographics

### REGIONS:



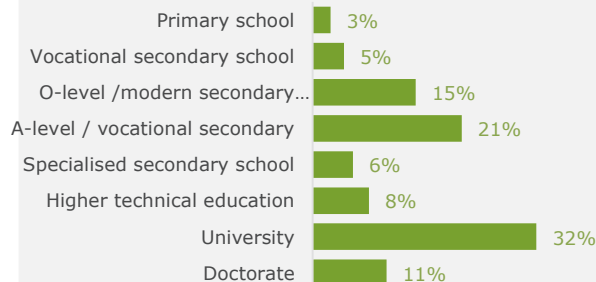
#### DETAILED DEFINITION OF REGIONS:

**Scotland, Northern Ireland, and Wales.** / **North:** North-east and north-west Yorkshire and Humber. **East:** East and West Midlands, East Anglia **London:** London. **South:** Southeast and southwest England.

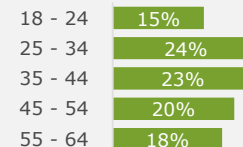
### GENDER:



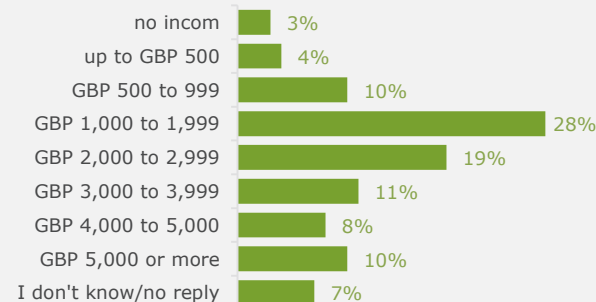
### EDUCATION:



### AGE:

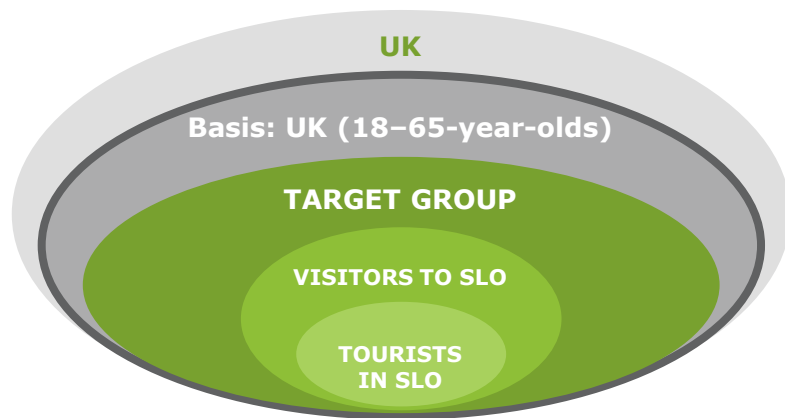


### PERSONAL INCOME:





# Sample shares and sizes



*Bordered ellipses show the basis for share calculations.*



Basis: UK 18-65-year-olds	
POPULATION (18-65 YEARS)	100.0%
TARGET GROUP	63.1%
VISITORS TO SLOVENIA	11.3%
TOURISTS IN SLOVENIA	2.0%

Basis: TARGET GROUP	
POPULATION (18-65 YEARS)	/
TARGET GROUP	100.0%
VISITORS TO SLOVENIA	18.0%
TOURISTS IN SLOVENIA	3.2%

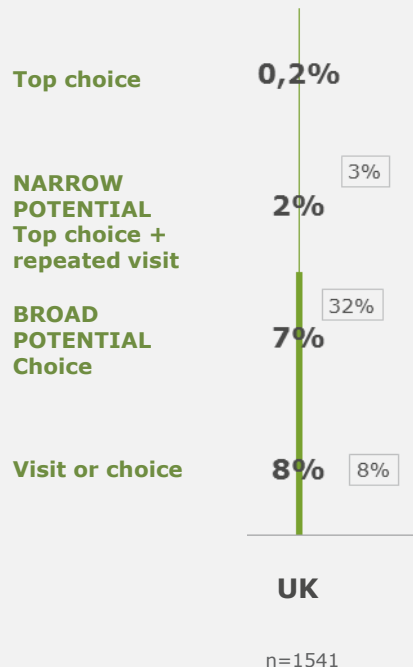
Absolute size*	
	39,850,721
	25,132,814
	4,507,249
	796,848

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

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



# UK: Size of the potential



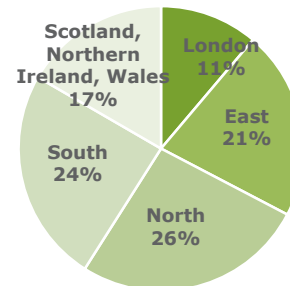
## NARROW POTENTIAL:

2%

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

	Size*
<b>Total in TG:</b>	<b>606,800</b>
London	67,802
East	130,409
North	159,780
South	147,825
Scotland, Northern Ireland, Wales	100,983

## REGIONAL CLASSIFICATION:



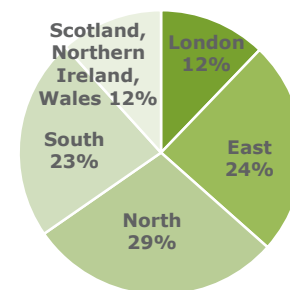
## BROAD POTENTIAL:

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*
<b>Total in TG:</b>	<b>1,723,589</b>
London	209,739
East	420,304
North	496,285
South	395,519
Scotland, Northern Ireland, Wales	201,742

## 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.

## UK: Size of segments by regions



## URBAN CONSUMERS:

19.2%

4,833,092



## GREEN EXPLORERS:

13.6%

3,420,872

BEAUTY AND  
INDULGENCE LOVERS:

13.4%

3,373,108

	Total	London	East	North	South	Scotland, Northern Ireland, Wales
%	100.0%	15.0%	22.6%	24.4%	22.3%	15.7%
Size	25,132,814	3,782,232	5,678,262	6,136,692	5,598,785	3,936,843
GREEN EXPLORERS	%	15.1%	22.6%	23.5%	23.8%	15.0%
Size	3,420,872	517,171	771,751	804,831	812,605	514,514
SOCIABLE FOODIES	%	13.1%	11.6%	26.9%	25.8%	12.9%
Size	3,296,158	383,502	887,246	850,203	748,963	426,245
URBAN CONSUMERS	%	19.2%	10.6%	20.7%	27.4%	24.0%
Size	4,833,092	511,400	999,746	1,326,615	1,160,483	834,847
URBAN CONSCIOUS	%	4.6%	16.3%	18.8%	27.3%	17.9%
Size	1,158,231	189,302	217,768	315,998	207,788	227,375
RELAXED ESCAPISTS	%	7.9%	18.6%	25.9%	26.6%	14.2%
Size	1,977,850	368,331	511,534	525,562	280,164	292,259
ACTIVE NOSTALGISTS	%	8.2%	24.4%	14.2%	22.9%	24.5%
Size	2,073,074	506,292	293,745	474,767	508,489	289,781
ADVENTURISTS	%	2.9%	16.5%	28.2%	29.7%	16.1%
Size	718,933	118,811	202,977	213,794	115,916	67,434
FOREVER YOUNG	%	9.1%	14.9%	26.1%	21.0%	23.4%
Size	2,274,965	339,985	592,763	478,101	532,435	331,680
BEAUTY AND INDULGENCE LOVERS	%	13.4%	8.0%	20.3%	25.6%	26.6%
Size	3,373,108	270,330	684,985	864,171	896,136	657,487
DEVOTED MOTHERS	%	2.8%	36.0%	24.8%	10.8%	11.9%
Size	707,782	255,045	175,271	76,194	83,955	117,316
ACTIVE FAMILIES	%	1.9%	44.3%	25.8%	14.1%	0.0%
Size	475,497	210,429	122,839	66,910	-	75,319
CAREFREE YOUTH	%	3.3%	14.0%	26.9%	17.2%	29.5%
Size	823,253	115,665	221,326	141,978	242,700	101,584

## 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	69%
Cities	57%
Capitals	39%
Countryside	34%
In the mountains	34%

TYPE OF  
ACCOMMODATION

Hotel	84%
Apartment	47%
Boutique hotel	26%
Staying with relatives or friends	24%
Hostel	16%

TRANSPORT TO THE  
DESTINATION

Aeroplane	81%
Car	11%
Coach	2%
Motorcycle	2%
Motorhome (camper)	2%

TRANSPORT AT THE  
DESTINATION

Car	62%
Coach	31%
Train	24%
On foot	16%
Motorcycle	5%

## ACTIVITIES

Sun and sea	59%
Sightseeing of old town centres	56%
Sightseeing of a town, the capital	52%
Natural sights, nature	48%
History and castles	46%

## MOTIVATION

Past experience	49%
Recommendations from friends	46%
Price of the destination	34%
Articles on the Internet	27%
Travel literature	27%

SOURCE OF  
INFORMATION

Friends, family	53%
Articles on the Internet	44%
Travel literature	32%
Web portals (TripAdvisor etc.)	30%
Agencies	19%

## RESERVATION METHOD

Booking.com	38%
Agency	34%
Expedia.com	30%
Directly at the accommodation provider	25%
Airbnb	14%

## TRAVELLING WITH

As a couple	43%
Family	34%
Friends	15%
Alone	7%
Relatives	1%

## CHARACTERISTICS:

Size*	<b>25,132,814</b>
Share*	<b>63%</b>
Age	<b>40</b>
Women	<b>49%</b>

Spring	<b>17%</b>
Summer	<b>63%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## UK: Tourists in Slovenia (3.2%)



## DESTINATION TYPE

In the mountains	62%	+28
By a lake	56%	+23
Cities	74%	+17
Capitals	61%	+22
Countryside	56%	+21

TYPE OF  
ACCOMMODATION

Boutique hotel	46%	+21
Hostel	30%	+14
Apartment	55%	+8
Private accommodation (e.g. Airbnb)	30%	+13
Hotel	84%	+0

TRANSPORT TO THE  
DESTINATION

Aeroplane	88%	+6
Motorcycle	3%	+2
Coach	3%	+1
Car	4%	-7
Motorhome (camper)	2%	+1

TRANSPORT AT THE  
DESTINATION

Train	38%	+14
Motorcycle	12%	+7
Coach	34%	+3
Car	51%	-11
Motorhome (camper)	7%	+4

## ACTIVITIES

Sightseeing of old town centres	85%	+28
Sightseeing of a town, the capital	70%	+18
History and castles	65%	+18
Natural sights, nature	63%	+16
Sports activities	33%	+13

## MOTIVATION

Travel literature	44%	+18
Articles on the Internet	39%	+12
Articles in print media	28%	+12
TV programmes	30%	+10
Past experience	46%	-3

SOURCE OF  
INFORMATION

Web portals (TripAdvisor etc.)	43%	+13
Articles in print media	37%	+20
Articles on the Internet	48%	+4
Blogs	23%	+11
Web forums	21%	+7

## RESERVATION METHOD

Airbnb	31%	+16
Expedia.com	35%	+5
Agoda.com	14%	+7
Other web portal	12%	+7
Booking.com	40%	+2

## TRAVELLING WITH

As a couple	51%	+8
Friends	19%	+5
Alone	12%	+5
Family	17%	-17

## CHARACTERISTICS:

Size*	796,848
Share*	2%
Age	42
Women	52%

Spring	26%
Summer	46%
Shorter trips	3
Longer trips	2

## NOTES:

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

# UK: Urban consumers (19.2%)



## DESTINATION TYPE

<u>Cities</u>	<b>81%</b>	<b>+24</b>
Capitals	41%	+2
By the sea	63%	-6
Countryside	23%	-11
Cultural and historical centres	17%	-16

## TYPE OF ACCOMMODATION

<u>Hotel</u>	<b>90%</b>	<b>+6</b>
Staying with relatives or friends	22%	-3
Own property (holiday cottage)	8%	-1
Apartment	41%	-6
Private accommodation (e.g. Airbnb)	13%	-3

## TRANSPORT TO THE DESTINATION

<u>Aeroplane</u>	<b>86%</b>	<b>+4</b>
<u>Coach</u>	<b>2%</b>	<b>+1</b>
Train	2%	+0
Car	8%	-3
Ship or another vessel	1%	+0

## TRANSPORT AT THE DESTINATION

Coach	31%	+1
Car	59%	-3
<u>On foot</u>	<b>19%</b>	<b>+3</b>
Train	25%	+0
Motorcycle	2%	-3

## ACTIVITIES

Shopping	64%	+27
<u>Nightlife (bars, clubs)</u>	<b>46%</b>	<b>+26</b>
Sun and sea	65%	+5
Sightseeing of a town, the capital	58%	+6
<u>Seeing major tourist attractions</u>	<b>54%</b>	<b>+8</b>

## MOTIVATION

<u>Price of the destination</u>	<b>40%</b>	<b>+6</b>
<u>Popularity of the destination</u>	<b>27%</b>	<b>+7</b>
Past experience	48%	+0
Recommendations from friends	44%	-2
Proximity of the destination	20%	+0

## SOURCE OF INFORMATION

Friends, family	55%	+2
Web forums	16%	+1
Web portals (TripAdvisor etc.)	29%	-1
Agencies	18%	+0
Travel literature	28%	-4

## RESERVATION METHOD

Booking.com	38%	+0
<u>Other web portal</u>	<b>9%</b>	<b>+3</b>
Agency	31%	-3
Own accommodation	5%	+0
Airbnb	11%	-3

## TRAVELLING WITH

As a couple	43%	+0
<u>Friends</u>	<b>17%</b>	<b>+3</b>
<u>Relatives</u>	<b>2%</b>	<b>+1</b>
Family	31%	-3
Alone	7%	+0

## CHARACTERISTICS:

Size*	<b>4,833,092</b>
Share*	<b>12%</b>
Age	<b>41</b>
Women	<b>47%</b>

Spring	<b>15%</b>
Summer	<b>61%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

### NOTES:

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

# UK: Green explorers (13.6%)



## DESTINATION TYPE

Cultural and historical centres	<b>70%</b>	<b>+37</b>
By the sea	<b>88%</b>	<b>+20</b>
Capitals	<b>70%</b>	<b>+31</b>
In the mountains	<b>67%</b>	<b>+33</b>
By a lake	<b>67%</b>	<b>+33</b>

## TYPE OF ACCOMMODATION

Apartment	<b>74%</b>	<b>+27</b>
Private accommodation (e.g. Airbnb)	<b>29%</b>	<b>+13</b>
Staying with relatives or friends	<b>29%</b>	<b>+4</b>
Camp	<b>16%</b>	<b>+4</b>
Hotel	<b>79%</b>	<b>-5</b>

## TRANSPORT TO THE DESTINATION

Aeroplane	<b>85%</b>	<b>+4</b>
Ship or another vessel	<b>2%</b>	<b>+1</b>
Train	<b>2%</b>	<b>+1</b>
Car	<b>7%</b>	<b>-5</b>
Motorcycle	<b>1%</b>	<b>+0</b>

## TRANSPORT AT THE DESTINATION

Coach	<b>38%</b>	<b>+8</b>
Train	<b>35%</b>	<b>+11</b>
Car	<b>64%</b>	<b>+2</b>
On foot	<b>20%</b>	<b>+4</b>
Motorhome (camper)	<b>4%</b>	<b>+0</b>

## ACTIVITIES

Sightseeing of old town centres	<b>82%</b>	<b>+26</b>
Natural sights, nature	<b>72%</b>	<b>+24</b>
Sightseeing of a town, the capital	<b>70%</b>	<b>+18</b>
History and castles	<b>59%</b>	<b>+13</b>
Recreation	<b>53%</b>	<b>+13</b>

## MOTIVATION

Past experience	<b>57%</b>	<b>+9</b>
Price of the destination	<b>45%</b>	<b>+11</b>
Suitability of the destination in all seasons	<b>29%</b>	<b>+10</b>
Travel literature	<b>32%</b>	<b>+5</b>
TV programmes	<b>26%</b>	<b>+6</b>

## SOURCE OF INFORMATION

Articles on the Internet	<b>58%</b>	<b>+14</b>
Price of the destination	<b>45%</b>	<b>+11</b>
Web portals (TripAdvisor etc.)	<b>41%</b>	<b>+11</b>
Travel literature	<b>40%</b>	<b>+8</b>
Friends, family	<b>57%</b>	<b>+4</b>
Articles in print media	<b>22%</b>	<b>+5</b>

## RESERVATION METHOD

Directly at the accommodation provider	<b>34%</b>	<b>+9</b>
Booking.com	<b>40%</b>	<b>+2</b>
Airbnb	<b>21%</b>	<b>+7</b>
Own accommodation	<b>7%</b>	<b>+2</b>
Expedia.com	<b>31%</b>	<b>+1</b>

## TRAVELLING WITH

As a couple	<b>51%</b>	<b>+8</b>
Friends	<b>16%</b>	<b>+2</b>
Family	<b>26%</b>	<b>-8</b>
Alone	<b>5%</b>	<b>-2</b>
Relatives	<b>1%</b>	<b>+0</b>

## CHARACTERISTICS:

Size*	<b>3,420,872</b>
Share*	<b>9%</b>
Age	<b>43</b>
Women	<b>52%</b>

Spring	<b>19%</b>
Summer	<b>57%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## UK: Beauty and indulgence lovers (13.4%)



## DESTINATION TYPE

<u>By the sea</u>	<b>96%</b>	<b>+27</b>
Cities	45%	-12
<u>Spas (wellness and spa)</u>	<b>17%</b>	<b>+9</b>
Countryside	19%	-15
Cultural and historical centres	19%	-14

## TYPE OF ACCOMMODATION

<u>Hotel</u>	<b>90%</b>	<b>+6</b>
Staying with relatives or friends	24%	-1
Apartment	44%	-3
Own property (holiday cottage)	7%	-1
Private accommodation (e.g. Airbnb)	12%	-4

## TRANSPORT TO THE DESTINATION

<u>Aeroplane</u>	<b>86%</b>	<b>+5</b>
Car	11%	+0
Coach	1%	-1
Train	1%	+0
Ship or another vessel	0%	-1

## TRANSPORT AT THE DESTINATION

<u>Car</u>	<b>72%</b>	<b>+9</b>
Coach	26%	-5
On foot	15%	-2
Bicycle	1%	-2
Train	12%	-13

## ACTIVITIES

<u>Sun and sea</u>	<b>88%</b>	<b>+28</b>
<u>Shopping</u>	<b>61%</b>	<b>+24</b>
<u>Recreation</u>	<b>55%</b>	<b>+15</b>
<u>Aquafun, amusement parks</u>	<b>44%</b>	<b>+22</b>
<u>Activities and fun for children</u>	<b>44%</b>	<b>+23</b>

## MOTIVATION

<u>Past experience</u>	<b>55%</b>	<b>+6</b>
<u>Price of the destination</u>	<b>43%</b>	<b>+9</b>
<u>Popularity of the destination</u>	<b>30%</b>	<b>+9</b>
Recommendations from friends	49%	+3
Suitability of the destination in all seasons	19%	+1

## SOURCE OF INFORMATION

<u>Friends, family</u>	<b>57%</b>	<b>+3</b>
<u>Web portals (TripAdvisor etc.)</u>	<b>37%</b>	<b>+7</b>
<u>Agencies</u>	<b>32%</b>	<b>+13</b>
Articles on the Internet	41%	-3
Opinions in social media	17%	+0

## RESERVATION METHOD

<u>Agency</u>	<b>55%</b>	<b>+21</b>
Directly at the accommodation provider	24%	+0
Own accommodation	5%	+0
Other web portal	5%	-1
Other	2%	+0

## TRAVELLING WITH

<u>Family</u>	<b>60%</b>	<b>+26</b>
As a couple	29%	-14
Friends	7%	-7
Alone	3%	-4

## CHARACTERISTICS:

Size*	<b>3,373,108</b>
Share*	<b>8%</b>
Age	<b>40</b>
Women	<b>65%</b>

Spring	<b>11%</b>
Summer	<b>70%</b>
Shorter trips	<b>2</b>
Longer trips	<b>1</b>

## UK: Sociable foodies (13.1%)



## DESTINATION TYPE

Cultural and historical centres	<b>77%</b>	<b>+44</b>
By the sea	<b>85%</b>	<b>+16</b>
Cities	<b>83%</b>	<b>+26</b>
Capitals	<b>68%</b>	<b>+29</b>
Countryside	<b>64%</b>	<b>+29</b>

## TYPE OF ACCOMMODATION

Hotel	<b>92%</b>	<b>+8</b>
Boutique hotel	<b>44%</b>	<b>+18</b>
Private accommodation (e.g. Airbnb)	<b>26%</b>	<b>+9</b>
Apartment	<b>52%</b>	<b>+5</b>
Staying with relatives or friends	<b>33%</b>	<b>+8</b>

## TRANSPORT TO THE DESTINATION

Aeroplane	<b>90%</b>	<b>+8</b>
Ship or another vessel	<b>2%</b>	<b>+1</b>
Motorcycle	<b>1%</b>	<b>-1</b>
Car	<b>7%</b>	<b>-5</b>
Train	<b>0%</b>	<b>-1</b>

## TRANSPORT AT THE DESTINATION

Train	<b>38%</b>	<b>+14</b>
Car	<b>64%</b>	<b>+2</b>
Coach	<b>35%</b>	<b>+4</b>
On foot	<b>24%</b>	<b>+7</b>
Motorcycle	<b>4%</b>	<b>-2</b>

## ACTIVITIES

History and castles	<b>86%</b>	<b>+39</b>
Sightseeing of a town, the capital	<b>85%</b>	<b>+33</b>
Sightseeing of old town centres	<b>88%</b>	<b>+32</b>
Natural sights, nature	<b>80%</b>	<b>+33</b>
Seeing major tourist attractions	<b>78%</b>	<b>+33</b>

## MOTIVATION

Price of the destination	<b>48%</b>	<b>+14</b>
Popularity of the destination	<b>33%</b>	<b>+12</b>
Past experience	<b>59%</b>	<b>+10</b>
TV programmes	<b>32%</b>	<b>+12</b>
Recommendations from friends	<b>56%</b>	<b>+10</b>

## SOURCE OF INFORMATION

Articles on the Internet	<b>58%</b>	<b>+14</b>
Web portals (TripAdvisor etc.)	<b>47%</b>	<b>+17</b>
Travel literature	<b>40%</b>	<b>+8</b>
Agencies	<b>25%</b>	<b>+6</b>
Friends, family	<b>54%</b>	<b>+0</b>

## RESERVATION METHOD

Directly at the accommodation provider	<b>35%</b>	<b>+10</b>
Expedia.com	<b>39%</b>	<b>+9</b>
Booking.com	<b>44%</b>	<b>+6</b>
Other web portal	<b>11%</b>	<b>+5</b>
Airbnb	<b>18%</b>	<b>+4</b>

## TRAVELLING WITH

As a couple	<b>50%</b>	<b>+7</b>
Family	<b>36%</b>	<b>+3</b>
Friends	<b>9%</b>	<b>-6</b>
Alone	<b>4%</b>	<b>-4</b>
Relatives	<b>1%</b>	<b>+0</b>

## CHARACTERISTICS:

Size*	<b>3,296,158</b>
Share*	<b>8%</b>
Age	<b>44</b>
Women	<b>61%</b>

Spring	<b>21%</b>
Summer	<b>60%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## NOTES:

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

## UK: Forever young (9.1%)



## DESTINATION TYPE

By the sea	58%	-10
Countryside	26%	-8
Cultural and historical centres	24%	-10
Spas (wellness and spa)	6%	-2
Cities	29%	-28

TYPE OF  
ACCOMMODATION

<b>Hotel</b>	<b>87%</b>	<b>+3</b>
Staying with relatives or friends	21%	-3
Camp	10%	-2
Glamping	9%	+0
Own property (holiday cottage)	8%	+0

TRANSPORT TO THE  
DESTINATION

Aeroplane	83%	+2
Coach	2%	+1
Car	11%	-1
Train	2%	+0
Motorhome (camper)	1%	+0

TRANSPORT AT THE  
DESTINATION

Coach	32%	+1
Car	60%	-3
Bicycle	3%	+1
Train	23%	-2
On foot	16%	+0

## ACTIVITIES

<b>Sightseeing of old town centres</b>	<b>73%</b>	<b>+17</b>
<b>History and castles</b>	<b>64%</b>	<b>+18</b>
<b>Sun and sea</b>	<b>65%</b>	<b>+6</b>
<b>Health treatments and services</b>	<b>23%</b>	<b>+10</b>
Sightseeing of a town, the capital	52%	+0

## MOTIVATION

Recommendations from friends	47%	+1
Past experience	47%	-2
Articles in print media	18%	+2
Price of the destination	31%	-3
Popularity of the destination	18%	-3

SOURCE OF  
INFORMATION

Friends, family	56%	+2
Articles on the Internet	43%	-1
Agencies	21%	+2
Travel literature	31%	-1
Web forums	15%	+1

## RESERVATION METHOD

<b>Expedia.com</b>	<b>37%</b>	<b>+7</b>
Agency	36%	+2
Directly at the accommodation provider	24%	-1
Organiser	8%	+1
Own accommodation	6%	+1

## TRAVELLING WITH

As a couple	46%	+3
Family	34%	+0
Alone	8%	+1
Friends	12%	-3
Relatives	1%	-1

## CHARACTERISTICS:

Size*	<b>2,274,965</b>
Share*	<b>6%</b>
Age	<b>42</b>
Women	<b>43%</b>

Spring	<b>15%</b>
Summer	<b>60%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## NOTES:

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## UK: Active nostalgists (8.2%)



## DESTINATION TYPE

By a lake	63%	+30
<u>Elsewhere in nature</u>	55%	+29
<u>In the mountains</u>	63%	+29
Countryside	36%	+2
By the sea	47%	-21

TYPE OF  
ACCOMMODATION

<u>Boutique hotel</u>	51%	+26
Hostel	21%	+5
<u>Glamping</u>	14%	+6
Hotel	83%	-1
<u>Camp</u>	17%	+5

TRANSPORT TO THE  
DESTINATION

Car	23%	+12
<u>Motorcycle</u>	3%	+1
Aeroplane	68%	-13
Coach	2%	+1
Motorhome (camper)	2%	+1

TRANSPORT AT THE  
DESTINATION

Car	68%	+6
<u>Motorcycle</u>	12%	+6
<u>Motorhome</u>	6%	+3
<u>(camper)</u>	21%	-9
Train	17%	-8

## ACTIVITIES

Sports activities	37%	+18
<u>Winter sports</u>	27%	+14
<u>Wellness and spa</u>	28%	+9
<u>Water sports</u>	26%	+11
activities	48%	+0
Natural sights, nature	48%	+0

## MOTIVATION

<u>Travel presentations</u>	25%	+14
Recommendations	43%	-3
from friends	26%	+0
Travel literature	25%	-2
Articles on the	20%	+0
Internet		
TV programmes		

SOURCE OF  
INFORMATION

Friends, family	56%	+3
<u>Travel presentations</u>	23%	+12
Articles on the	33%	+1
Internet	37%	-6
Articles in print media	16%	-2

## RESERVATION METHOD

<u>Agency</u>	40%	+6
Booking.com	41%	+3
<u>Organiser</u>	17%	+9
Expedia.com	32%	+2
Through official TICs	5%	+1

## TRAVELLING WITH

<u>As a couple</u>	47%	+4
<u>Friends</u>	18%	+4
Family	25%	-9
Alone	9%	+1
Relatives	1%	+0

## CHARACTERISTICS:

Size*	2,073,074
Share*	5%
Age	38
Women	36%

Spring	21%
Summer	66%
Shorter trips	3
Longer trips	2

## NOTES:

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## UK: Relaxed escapists (7.9%)



## DESTINATION TYPE

In the mountains	28%	-6
Countryside	26%	-9
By the sea	42%	-26
Cities	32%	-25
Capitals	20%	-19

TYPE OF  
ACCOMMODATION

Hotel	83%	-1
<u>Tourist farm</u>	<u>14%</u>	<u>+5</u>
Glamping	11%	+2
Staying with relatives or friends	21%	-4
Hostel	14%	-2

TRANSPORT TO THE  
DESTINATION

<u>Motorcycle</u>	<u>5%</u>	<u>+4</u>
<u>Car</u>	<u>14%</u>	<u>+3</u>
<u>Coach</u>	<u>5%</u>	<u>+4</u>
Aeroplane	70%	-11
<u>Motorhome</u> <u>(camper)</u>	<u>4%</u>	<u>+2</u>

TRANSPORT AT THE  
DESTINATION

Car	56%	-6
<u>Motorhome</u> <u>(camper)</u>	<u>7%</u>	<u>+3</u>
Coach	23%	-8
Train	19%	-5
<u>Bicycle</u>	<u>6%</u>	<u>+3</u>

## ACTIVITIES

<u>Selfness, digital- detox, etc.</u>	<u>28%</u>	<u>+18</u>
<u>Thermal health spas</u>	<u>20%</u>	<u>+8</u>
<u>Winter sports</u>	<u>19%</u>	<u>+6</u>
Gastronomy	20%	-2
Water sports activities	15%	+0

## MOTIVATION

Posts on social media, blogs	20%	+1
<u>Travel presentations</u>	<u>16%</u>	<u>+5</u>
Travel literature	18%	-8
Articles in print media	14%	-3
Past experience	33%	-16

SOURCE OF  
INFORMATION

Opinions in social media	22%	+6
<u>Travel presentations</u>	<u>18%</u>	<u>+7</u>
Friends, family	41%	-13
Blogs	14%	+2
Travel literature	22%	-10

## RESERVATION METHOD

<u>Booking.com</u>	<u>42%</u>	<u>+4</u>
<u>Organiser</u>	<u>13%</u>	<u>+5</u>
Expedia.com	26%	-4
Airbnb	16%	+2
<u>At the activity provider</u>	<u>8%</u>	<u>+3</u>

## TRAVELLING WITH

As a couple	42%	-1
Friends	14%	-1
<u>Alone</u>	<u>12%</u>	<u>+5</u>
Family	32%	-2
Relatives	1%	+0

## CHARACTERISTICS:

Size*	<b>1,977,850</b>
Share*	<b>5%</b>
Age	<b>36</b>
Women	<b>42%</b>

Spring	<b>16%</b>
Summer	<b>64%</b>
Shorter trips	<b>3</b>
Longer trips	<b>2</b>

## UK: Urban conscious (4.6%)



## DESTINATION TYPE

Cities	<b>82%</b>	<b>+25</b>
Capitals	<b>70%</b>	<b>+31</b>
Cultural and historical centres	<b>48%</b>	<b>+14</b>
Countryside	22%	-12
Spas (wellness and spa)	4%	-4

## TYPE OF ACCOMMODATION

Hostel	<b>38%</b>	<b>+22</b>
Hotel	85%	+2
Camp	<b>20%</b>	<b>+8</b>
Tourist farm	<b>17%</b>	<b>+8</b>
Private accommodation (e.g. Airbnb)	<b>21%</b>	<b>+5</b>

## TRANSPORT TO THE DESTINATION

Car	13%	+2
Train	3%	+1
Aeroplane	80%	-1
Motorcycle	2%	+1
Coach	1%	+0

## TRANSPORT AT THE DESTINATION

Train	<b>30%</b>	<b>+6</b>
Coach	35%	+5
Bicycle	<b>5%</b>	<b>+2</b>
Car	53%	-10
On foot	15%	-1

## ACTIVITIES

Learning about the local way of life	<b>69%</b>	<b>+46</b>
Sightseeing of a town, the capital	<b>77%</b>	<b>+25</b>
Museums, galleries and art	<b>65%</b>	<b>+33</b>
Sightseeing of old town centres	<b>72%</b>	<b>+15</b>
Social events, festivals	<b>50%</b>	<b>+22</b>

## MOTIVATION

Travel literature	<b>43%</b>	<b>+17</b>
Articles on the Internet	<b>39%</b>	<b>+12</b>
Past experience	54%	+5
Proximity of the destination	<b>27%</b>	<b>+7</b>
Articles in print media	<b>25%</b>	<b>+9</b>

## SOURCE OF INFORMATION

Articles in print media	<b>25%</b>	<b>+8</b>
Articles on the Internet	<b>51%</b>	<b>+7</b>
Friends, family	<b>60%</b>	<b>+6</b>
Travel literature	<b>38%</b>	<b>+6</b>
Opinions in social media	23%	+6

## RESERVATION METHOD

Booking.com	41%	+3
<b>Airbnb</b>	<b>26%</b>	<b>+12</b>
Directly at the accommodation provider	27%	+2
<b>Other web portal</b>	<b>11%</b>	<b>+5</b>
Expedia.com	28%	-1

## TRAVELLING WITH

Friends	<b>22%</b>	<b>+7</b>
As a couple	47%	+4
Alone	<b>12%</b>	<b>+5</b>
Family	16%	-18
Relatives	<b>3%</b>	<b>+2</b>

## CHARACTERISTICS:

Size*	<b>1,158,231</b>
Share*	<b>3%</b>
Age	<b>38</b>
Women	<b>42%</b>

Spring	<b>19%</b>
Summer	<b>56%</b>
Shorter trips	<b>2</b>
Longer trips	<b>2</b>

## UK: Carefree youth (3.3%)



## DESTINATION TYPE

<u>By the sea</u>	<b>87%</b>	<b>+18</b>
<u>Cities</u>	<b>64%</b>	<b>+7</b>
Capitals	36%	-3
Countryside	20%	-14
Elsewhere in nature	14%	-13

TYPE OF  
ACCOMMODATION

<u>Hostel</u>	<b>46%</b>	<b>+30</b>
Staying with relatives or friends	28%	+4
<u>Glamping</u>	<b>13%</b>	<b>+4</b>
Private accommodation (e.g. Airbnb)	18%	+2
<u>Camper</u>	<b>11%</b>	<b>+7</b>

TRANSPORT TO THE  
DESTINATION

Coach	3%	+1
Aeroplane	81%	+0
Car	12%	+0
Motorhome (camper)	2%	+1
Train	2%	+1

TRANSPORT AT THE  
DESTINATION

Coach	32%	+2
<u>Motorhome (camper)</u>	<b>10%</b>	<b>+6</b>
Car	38%	-24
Train	22%	-2
Motorcycle	7%	+2

## ACTIVITIES

<u>Nightlife (bars, clubs)</u>	<b>53%</b>	<b>+32</b>
<u>Music festivals and concerts</u>	<b>36%</b>	<b>+18</b>
Seeing major tourist attractions	52%	+6
<u>Water sports activities</u>	<b>21%</b>	<b>+6</b>
Social events, festivals	33%	+6

## MOTIVATION

<u>Popularity of the destination</u>	<b>28%</b>	<b>+8</b>
Recommendations from friends	44%	-2
Suitability of the destination in all seasons	20%	+2
Travel literature	24%	-3
TV programmes	19%	-1

SOURCE OF  
INFORMATION

Web portals (TripAdvisor etc.)	30%	-1
Travel presentations	12%	+1
Travel literature	28%	-5
Agencies	17%	-1
Friends, family	38%	-16

## RESERVATION METHOD

Expedia.com	36%	+6
Agoda.com	9%	+2
Directly at the accommodation provider	23%	-1
Booking.com	35%	-3
Airbnb	13%	-1

## TRAVELLING WITH

<u>Friends</u>	<b>23%</b>	<b>+8</b>
As a couple	38%	-5
<u>Alone</u>	<b>13%</b>	<b>+5</b>
Family	24%	-10
Relatives	2%	+1

## CHARACTERISTICS:

Size*	<b>823,253</b>
Share*	<b>2%</b>
Age	<b>36</b>
Women	<b>27%</b>

Spring	<b>23%</b>
Summer	<b>62%</b>
Shorter trips	<b>3</b>
Longer trips	<b>1</b>

## UK: Adventurists (2.9%)



## DESTINATION TYPE

By a lake	69%	+36
<u>Elsewhere in nature</u>	63%	+36
<u>In the mountains</u>	56%	+22
Countryside	41%	+6
Spas (wellness and spa)	7%	-1

TYPE OF  
ACCOMMODATION

Hostel	31%	+14
Camp	28%	+15
<u>Tourist farm</u>	24%	+14
Staying with relatives or friends	28%	+4
<u>Glamping</u>	16%	+7

TRANSPORT TO THE  
DESTINATION

Car	17%	+6
<u>Motorhome (camper)</u>	13%	+11
<u>Ship or another vessel</u>	3%	+2
Aeroplane	64%	-17
Motorcycle	3%	+1

TRANSPORT AT THE  
DESTINATION

<u>Motorcycle</u>	26%	+21
Car	61%	-1
Coach	31%	+1
<u>Motorhome (camper)</u>	10%	+7
<u>Bicycle</u>	9%	+7

## ACTIVITIES

History and castles	80%	+34
<u>Water sports activities</u>	43%	+28
<u>Adrenaline sports challenges</u>	39%	+29
Natural sights, nature	54%	+7
<u>Winter sports</u>	28%	+15

## MOTIVATION

Articles on the Internet	34%	+7
<u>Travel literature</u>	34%	+7
Posts on social media, blogs	26%	+7
<u>Articles in print media</u>	24%	+8
<u>Travel presentations</u>	20%	+9

SOURCE OF  
INFORMATION

<u>Travel literature</u>	46%	+14
Articles on the Internet	48%	+4
<u>Travel presentations</u>	24%	+14
Opinions in social media	26%	+9
Articles in print media	22%	+5

## RESERVATION METHOD

<u>Agoda.com</u>	24%	+17
Booking.com	42%	+4
Expedia.com	34%	+4
<u>Organiser</u>	15%	+7
<u>Through official TICs</u>	11%	+8

## TRAVELLING WITH

As a couple	42%	-1
Friends	19%	+4
Family	30%	-4
Alone	9%	+2

## CHARACTERISTICS:

Size*	718,933
Share*	2%
Age	37
Women	43%

Spring	16%
Summer	68%
Shorter trips	3
Longer trips	2

## NOTES:

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

## UK: Devoted mothers (2.8%)



## DESTINATION TYPE

<u>In the mountains</u>	<b>58%</b>	<b>+24</b>
<u>By a lake</u>	<b>49%</b>	<b>+16</b>
<u>Elsewhere in nature</u>	<b>42%</b>	<b>+15</b>
Countryside	33%	-1
Spas (wellness and spa)	4%	-4

TYPE OF  
ACCOMMODATION

<u>Tourist farm</u>	<b>48%</b>	<b>+39</b>
<u>Apartment</u>	<b>71%</b>	<b>+24</b>
<u>Hostel</u>	<b>39%</b>	<b>+23</b>
<u>Glamping</u>	<b>28%</b>	<b>+19</b>
<u>Camp</u>	<b>27%</b>	<b>+15</b>

TRANSPORT TO THE  
DESTINATION

<u>Car</u>	<b>20%</b>	<b>+9</b>
<u>Motorhome (camper)</u>	<b>8%</b>	<b>+7</b>
<u>Motorcycle</u>	<b>4%</b>	<b>+2</b>
Aeroplane	68%	-14

TRANSPORT AT THE  
DESTINATION

<u>Motorcycle</u>	<b>25%</b>	<b>+20</b>
<u>Car</u>	<b>65%</b>	<b>+3</b>
<u>Motorhome (camper)</u>	<b>20%</b>	<b>+17</b>
<u>Coach</u>	<b>24%</b>	<b>-7</b>
<u>Bicycle</u>	<b>4%</b>	<b>+2</b>

## ACTIVITIES

<u>Activities and fun for children</u>	<b>47%</b>	<b>+26</b>
<u>Countryside, farm activities</u>	<b>45%</b>	<b>+35</b>
<u>Sports activities</u>	<b>37%</b>	<b>+18</b>
Wellness and spa	23%	+5
<u>Health treatments and services</u>	<b>21%</b>	<b>+8</b>

## MOTIVATION

<u>Articles in print media</u>	<b>31%</b>	<b>+15</b>
<u>Travel presentations</u>	<b>25%</b>	<b>+14</b>
Recommendations from friends	39%	-7
Posts on social media, blogs	25%	+5
Articles on the Internet	27%	+0

SOURCE OF  
INFORMATION

<u>Articles in print media</u>	<b>35%</b>	<b>+18</b>
<u>Travel presentations</u>	<b>24%</b>	<b>+13</b>
Friends, family	41%	-12
Travel literature	30%	-3
Blogs	23%	+10

## RESERVATION METHOD

Expedia.com	36%	+6
<u>Agoda.com</u>	<b>21%</b>	<b>+15</b>
<u>Organiser</u>	<b>20%</b>	<b>+12</b>
Booking.com	35%	-3
Airbnb	13%	-1

## TRAVELLING WITH

<u>Family</u>	<b>42%</b>	<b>+8</b>
Friends	14%	-1
Alone	8%	+1
As a couple	36%	-7

## CHARACTERISTICS:

Size*	<b>707,782</b>
Share*	<b>2%</b>
Age	<b>35</b>
Women	<b>47%</b>

Spring	<b>19%</b>
Summer	<b>74%</b>
Shorter trips	<b>4</b>
Longer trips	<b>2</b>

## NOTES:

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

## UK: Active families (1.9%)



## DESTINATION TYPE

In the mountains	64%	<b>+31</b>
Elsewhere in nature	60%	<b>+33</b>
By a lake	56%	<b>+23</b>
Countryside	35%	+1
By the sea	44%	-25

TYPE OF  
ACCOMMODATION

Apartment	80%	<b>+33</b>
Hostel	41%	<b>+25</b>
Tourist farm	31%	<b>+22</b>
Boutique hotel	47%	<b>+22</b>
Camp	31%	<b>+19</b>

TRANSPORT TO THE  
DESTINATION

Car	24%	<b>+13</b>
Motorcycle	9%	<b>+8</b>
Ship or another vessel	4%	<b>+3</b>
Aeroplane	59%	-22
Train	3%	+2

TRANSPORT AT THE  
DESTINATION

Car	63%	+1
Motorcycle	17%	<b>+12</b>
Coach	25%	-6
Motorhome (camper)	13%	<b>+9</b>
Bicycle	11%	<b>+8</b>

## ACTIVITIES

Mountaineering (more challenging tours)	56%	<b>+48</b>
Water sports activities	55%	<b>+40</b>
Selfness, digital-detox, etc.	43%	<b>+33</b>
Sports activities	43%	<b>+24</b>
Health treatments and services	34%	<b>+21</b>

## MOTIVATION

Travel literature	51%	<b>+25</b>
Travel presentations	38%	<b>+27</b>
Articles in print media	30%	<b>+13</b>
Articles on the Internet	<b>40%</b>	<b>+13</b>
Recommendations from friends	43%	-3

SOURCE OF  
INFORMATION

Travel literature	47%	<b>+15</b>
Articles in print media	42%	<b>+24</b>
Friends, family	50%	-3
Travel presentations	31%	<b>+21</b>
Blogs	15%	+3

## RESERVATION METHOD

Organiser	43%	<b>+35</b>
Booking.com	60%	<b>+23</b>
At the activity provider	25%	<b>+20</b>
Expedia.com	42%	<b>+12</b>
Agoda.com	17%	<b>+10</b>

## TRAVELLING WITH

Friends	33%	<b>+19</b>
Alone	25%	<b>+18</b>
Family	28%	-6
As a couple	14%	-29

## CHARACTERISTICS:

Size*	<b>475,497</b>
Share*	<b>1%</b>
Age	<b>30</b>
Women	<b>29%</b>

Spring	<b>34%</b>
Summer	<b>63%</b>
Shorter trips	<b>4</b>
Longer trips	<b>3</b>

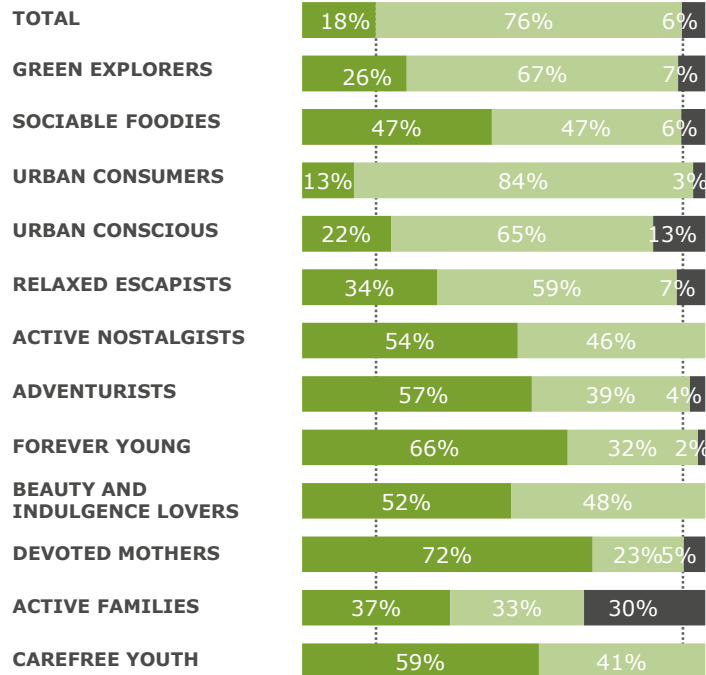
## NOTES:

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

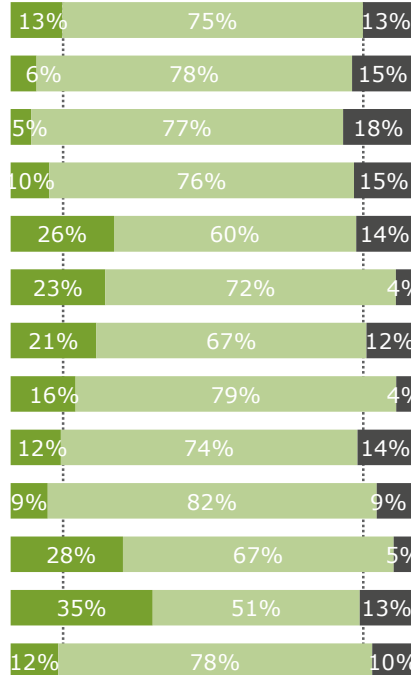
# UK: Price sensitivity



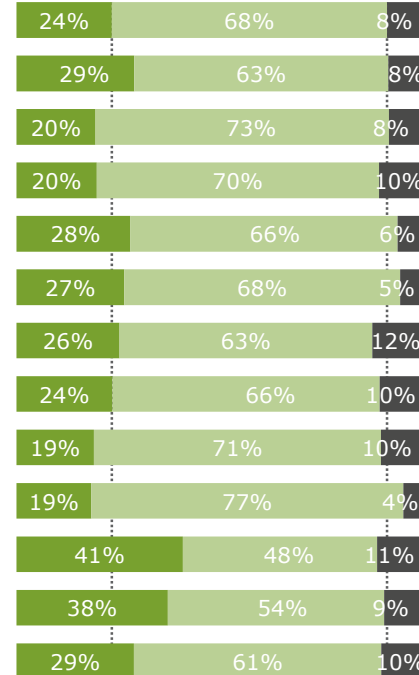
## CHOICE OF ACCOMMODATION



## CHOICE OF DESTINATION



## CHOICE OF TRANSPORT

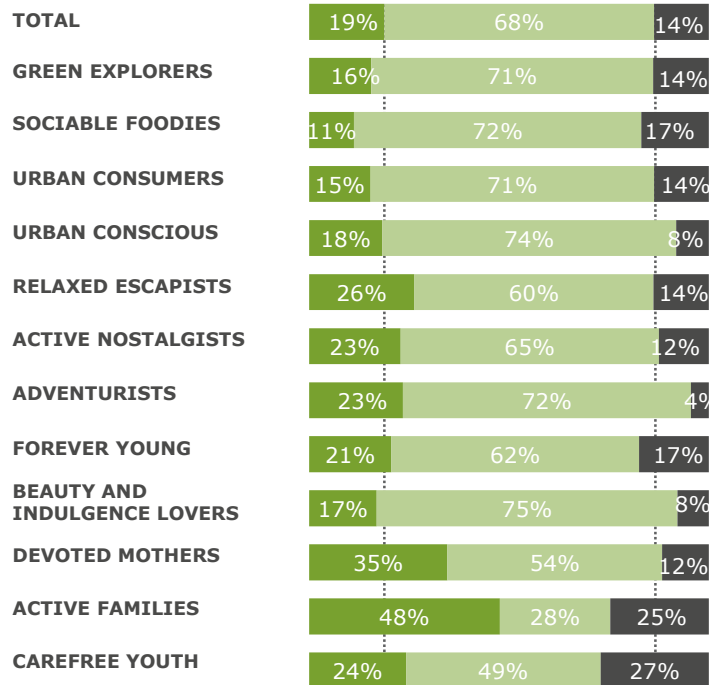


seek the most favourable offer
  assess value for money
  disregard the price

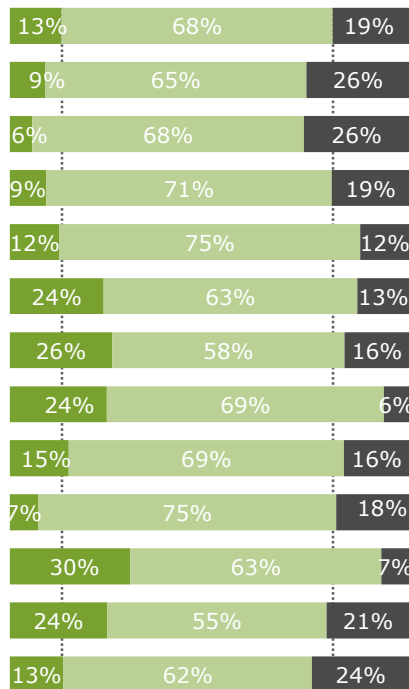
# UK: Price sensitivity



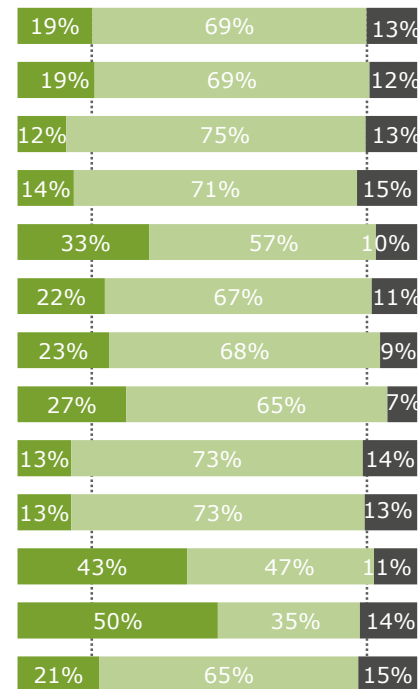
## CHOICE OF ADDITIONAL ACTIVITIES



## CHOICE OF FOOD



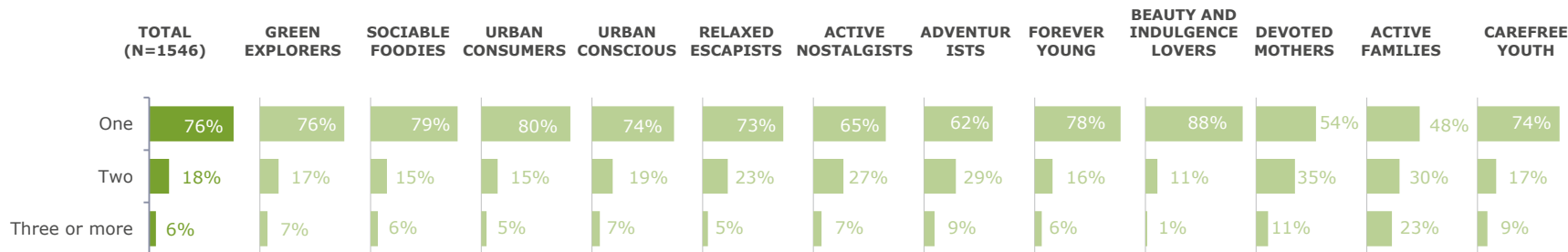
## SHOPPING



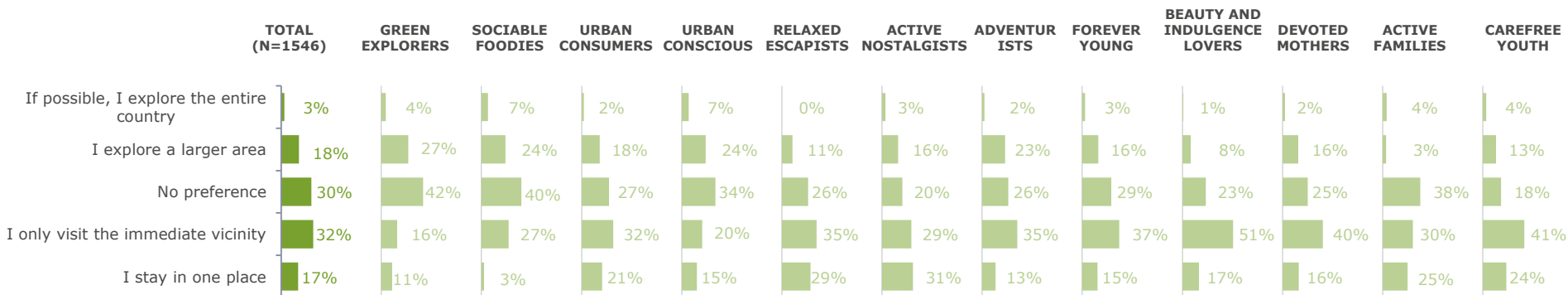
seek the most favourable offer
  assess value for money
  disregard the price



## 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	<b>25,132,814</b>	Spring	<b>17%</b>
Proportion	<b>63.1%</b>	Summer	<b>63%</b>
Age	<b>40</b>	Shorter trips	<b>2</b>
Women	<b>49%</b>	Longer trips	<b>2</b>

## TRAVELLING WITH:

As a couple	<b>43%</b>
Family	<b>34%</b>
Friends	<b>15%</b>
Alone	<b>7%</b>
Relatives	<b>1%</b>

## DESTINATION TYPE:

By the sea	<b>47%</b>	<b>22%</b>	<b>69%</b>
Towns	<b>17%</b>	<b>40%</b>	<b>57%</b>
Capital	<b>4%</b>	<b>35%</b>	<b>39%</b>

**4x**

a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sun and sea	<b>59%</b>
Sightseeing of old town centres	<b>56%</b>
Sightseeing of a town, the capital	<b>52%</b>
Nature parks, attractions	<b>48%</b>
History and castles	<b>46%</b>
Tourist attractions	<b>46%</b>
Recreation	<b>40%</b>
Shopping	<b>37%</b>
Museums, galleries, art	<b>32%</b>
Social events, festivals, other events	<b>28%</b>

## TRAVEL MOTIVES – TOP 10:

Visit a beautiful destination	<b>11%</b>	<b>35%</b>
Retreat from everyday life	<b>11%</b>	<b>33%</b>
To learn something new	<b>11%</b>	<b>31%</b>
Relaxation	<b>12%</b>	<b>30%</b>
Enjoy good food, drinks	<b>4%</b>	<b>29%</b>
Spend time with partner	<b>8%</b>	<b>27%</b>
Experience another culture	<b>7%</b>	<b>27%</b>
Spend time with family, strengthen bonds	<b>9%</b>	<b>22%</b>
Rest, slow down the pace of life	<b>6%</b>	<b>21%</b>
Visit a town, the capital	<b>6%</b>	<b>21%</b>

## VISITING COUNTRIES – TOP 10:

Spain	<b>56%</b>	<b>67%</b>
France	<b>40%</b>	<b>51%</b>
Italy	<b>35%</b>	<b>41%</b>
Greece	<b>27%</b>	<b>35%</b>
Germany	<b>24%</b>	<b>33%</b>
Portugal	<b>23%</b>	<b>30%</b>
Ireland	<b>21%</b>	<b>29%</b>
Non-European countries	<b>18%</b>	<b>28%</b>
Netherlands	<b>18%</b>	<b>26%</b>
Belgium	<b>14%</b>	<b>25%</b>
Slovenia	<b>2%</b>	<b>3%</b>

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).

## TYPE OF ACCOMMODATION:



Other frequent accommodation types:

**Relatives, friends: 24%**

**Hostel: 16%**

**Private accommodation: 16%**

## RESERVATION

**UP TO 3 months in advance**

**63%**

## TRANSPORT MODE (%):

AIRPLANE CAR MOTORHOME COACH MOTORCYCLE

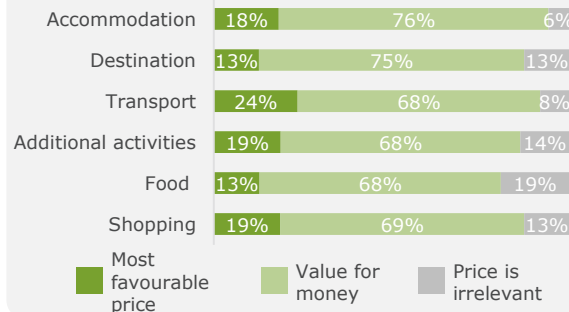


**81 - 11 62 2 4 2 31 2 5**

☐ To the destination

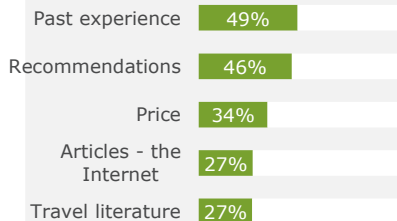
☐ At the destination (**24% TRAIN, 16% ON FOOT, 3% BICYCLE**)

## PRICE SENSITIVITY:

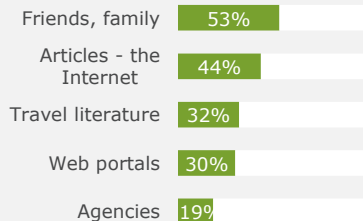


## PURCHASE JOURNEY:

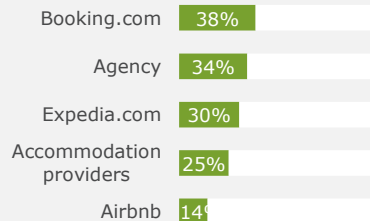
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
<b>ACCOMMODATION, FOOD and other per person/day</b>	<b>€66</b>	<b>€68</b>
<b>TRANSPORT per person</b>	<b>€137</b>	<b>€147</b>

## 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.

# UK: General travel habits and motives

Subsample: visitors to Slovenia



## CHARACTERISTICS OF VISITORS TO SLOVENIA:

Size	4,507,249	Spring	26%
Proportion	11.3%	Summer	62%
Age	35	Shorter trips	4
Women	35%	Longer trips	2

## TRAVELLING WITH:

As a couple	40%
Family	25%
Friends	18%
Alone	16%
Relatives	1%

## DESTINATION TYPE:

By the sea	33%	22%	55%
In the mountains	15%	39%	55%
Towns	15%	35%	50%

6x  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of old town centres	45%
Sightseeing of a town, the capital	42%
History and castles	41%
Sports activities	38%
Nature parks, attractions	37%
Recreation	37%
Tourist attractions	36%
Water sports activities	31%
Sun and sea	31%
Winter sports	30%

## TRAVEL MOTIVES – TOP 10:

Visit a beautiful destination	11%	28%
Visit a town, the capital	9%	26%
Experience another culture	6%	24%
To learn something new	10%	24%
Relaxation	11%	22%
Retreat from everyday life	7%	21%
Enjoy good food, drinks	4%	21%
Spend time with partner	4%	21%
Spend time with family, strengthen bonds	3%	17%
Experience diversity	6%	16%

## VISITING COUNTRIES – TOP 10:

Spain	38%	52%
France	35%	47%
Italy	34%	42%
Germany	25%	37%
Greece	25%	34%
Belgium	18%	30%
Portugal	16%	26%
Turkey	11%	26%
Austria	17%	25%
Ireland	17%	24%
Slovenia	12%	18%

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).

# UK: Elements of the purchase journey and consumption

Subsample: visitors to Slovenia



## TYPE OF ACCOMMODATION:



Other frequent accommodation types:

**Hostel: 37%**

**Camp: 27%**

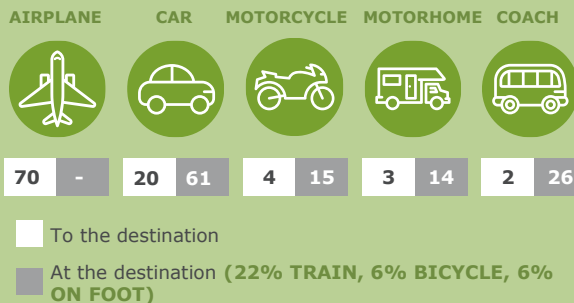
**Tourist farm 26%**

## RESERVATION

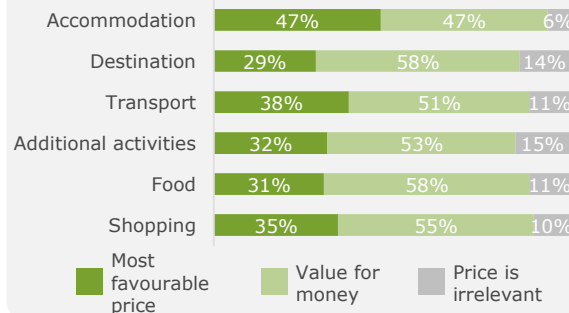
UP  
TO 3  
months in  
advance

78%

## TRANSPORT MODE (%):

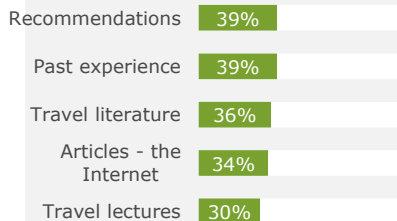


## PRICE SENSITIVITY:

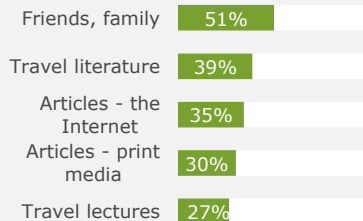


## PURCHASE JOURNEY:

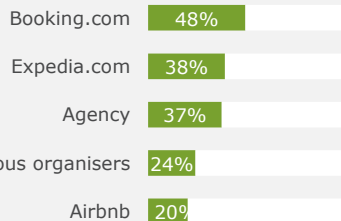
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

	PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	€55	€53
TRANSPORT per person	€124	€135

## 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.

# UK: General travel habits and motives

Subsample: tourists in Slovenia



## CHARACTERISTICS OF TOURISTS IN SLOVENIA:

Size	796,848	Spring	26%
Proportion	2.0%	Summer	46%
Age	42	Shorter trips	3
Women	52%	Longer trips	2

## TRAVELLING WITH:

As a couple	51%
Friends	19%
Family	17%
Alone	12%

## DESTINATION TYPE:

Towns	26%	49%	74%
By the sea	29%	37%	66%
In the mountains	13%	49%	62%

5x  
a year  
travels  
abroad

## ACTIVITIES – TOP 10:

Sightseeing of old town centres	85%
Sightseeing of a town, the capital	70%
History and castles	65%
Nature parks, attractions	63%
Tourist attractions	55%
Sun and sea	54%
Recreation	52%
Museums, galleries, art	41%
Sports activities	33%
Shopping	29%

## TRAVEL MOTIVES – TOP 10:

Visit a beautiful destination	11%	47%
To learn something new	21%	36%
Experience another culture	15%	36%
Enjoy good food, drinks	3%	34%
Retreat from everyday life	12%	33%
Visit a town, the capital	7%	32%
Spend time with partner	4%	20%
Spend time actively	2%	19%
Relaxation	7%	15%
Experience diversity	0%	14%

## VISITING COUNTRIES – TOP 10:

Slovenia	68%	100%
Italy	70%	87%
France	63%	82%
Spain	63%	77%
Germany	49%	70%
Austria	46%	64%
Croatia	51%	57%
Belgium	34%	56%
Greece	41%	54%
Czechia	38%	53%

Repeated visit  
Visit

## NOTES:

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

# UK: Elements of the purchase journey and consumption

*Subsample: tourists in Slovenia*



## TYPE OF ACCOMMODATION:



Other frequent accommodation types:

**Hostel: 30%**

**Private accommodation: 30%**

**Camp: 21%**

## RESERVATION

**UP  
TO 3  
months in  
advance**

**66%**

## TRANSPORT MODE (%):

AIRPLANE CAR COACH MOTORCYCLE MOTORHOME

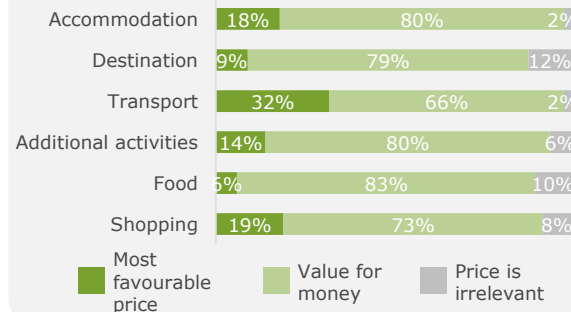


88 - 4 51 3 34 3 12 2 7

□ To the destination

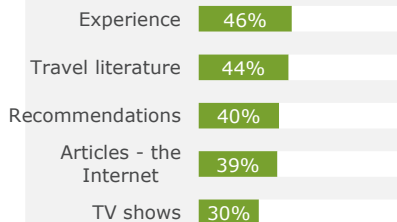
■ At the destination (38% TRAIN, 10% ON FOOT, 3% BICYCLE)

## PRICE SENSITIVITY:

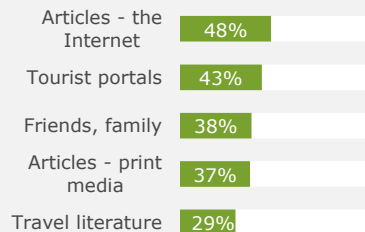


## PURCHASE JOURNEY:

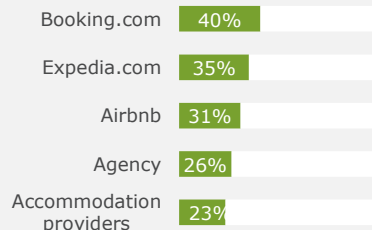
### MOTIVATIONS:



### SOURCES OF INFORMATION:



### RESERVATION METHOD:



## BUDGET AND SPENDING:

		PLANNED COSTS	ACTUAL COSTS
ACCOMMODATION, FOOD and other per person/day	in Europe	€65	€66
	in SLO	€58	€58
TRANSPORT per person	in Europe	€159	€159
	in SLO	€127	€124

## 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**



# UK: Destination relevance

Share of visitors by popularity of the destination



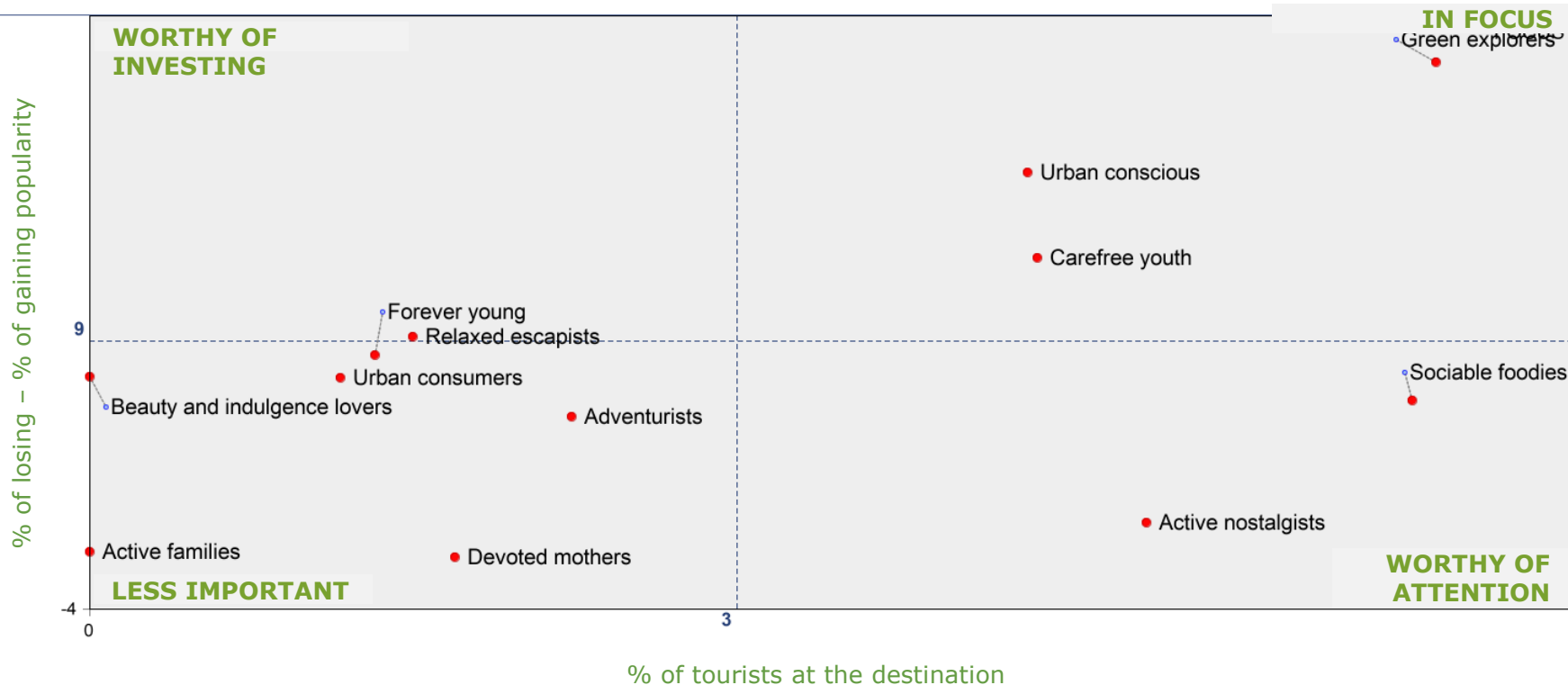
**NOTES:**

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).

# UK: Slovenia's relevance



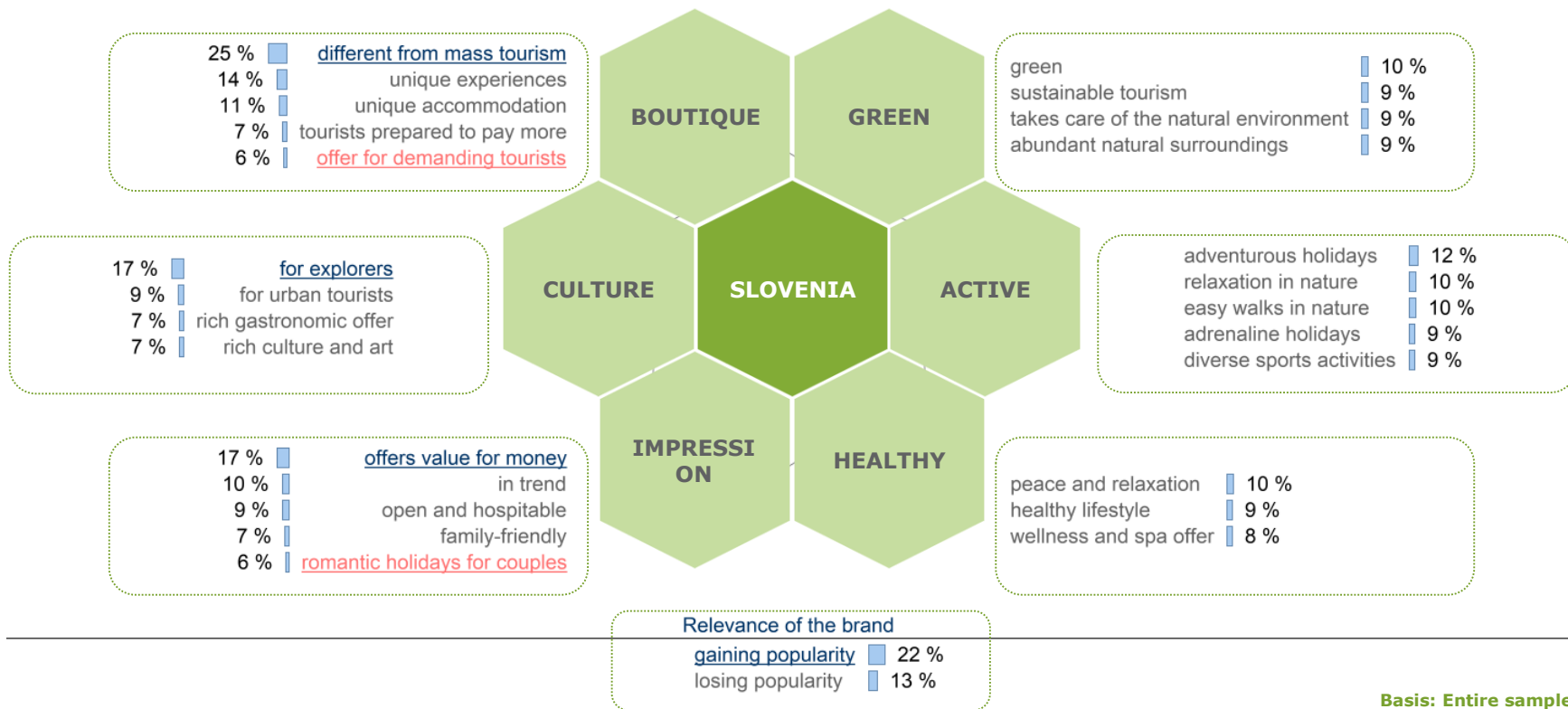
Slovenia's relevance as a tourist destination according to the popularity by segments of tourists



**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).

# UK: Slovenia's image



**Basis: Entire sample**

**NOTES:**

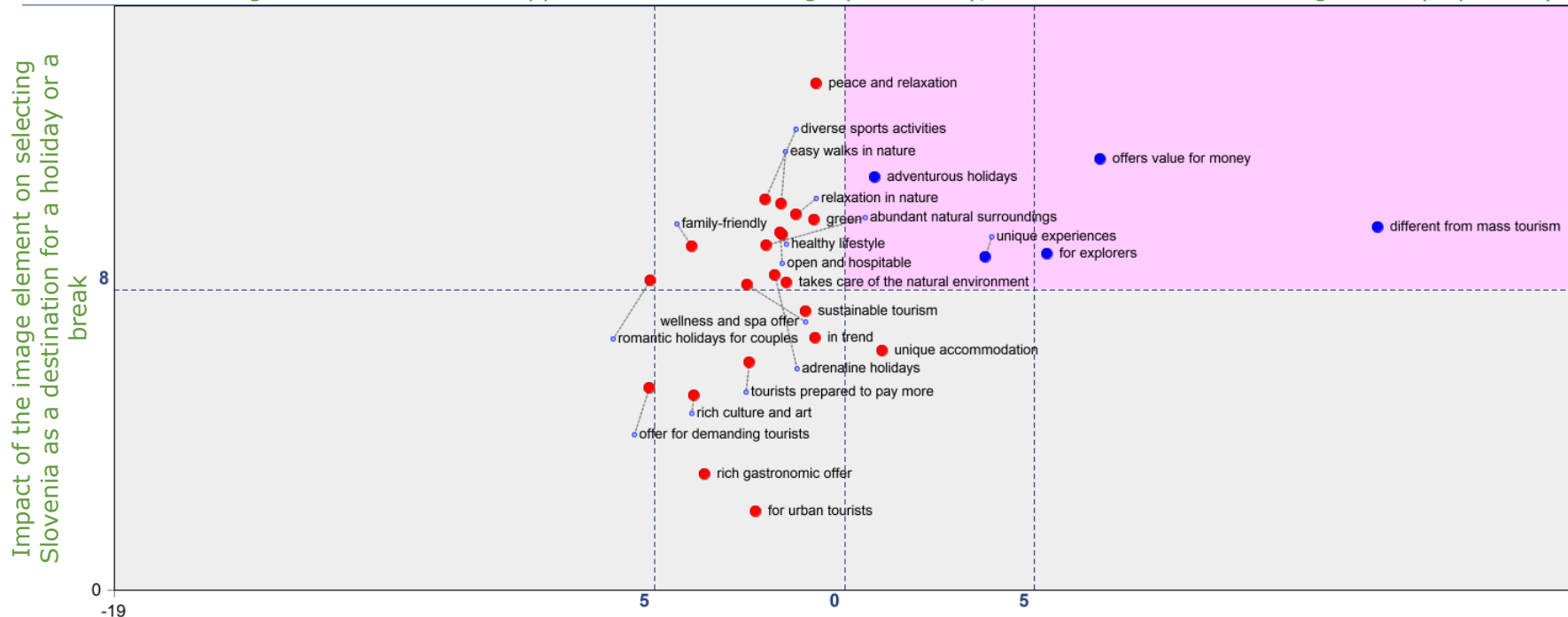
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

# UK: Significance of elements

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



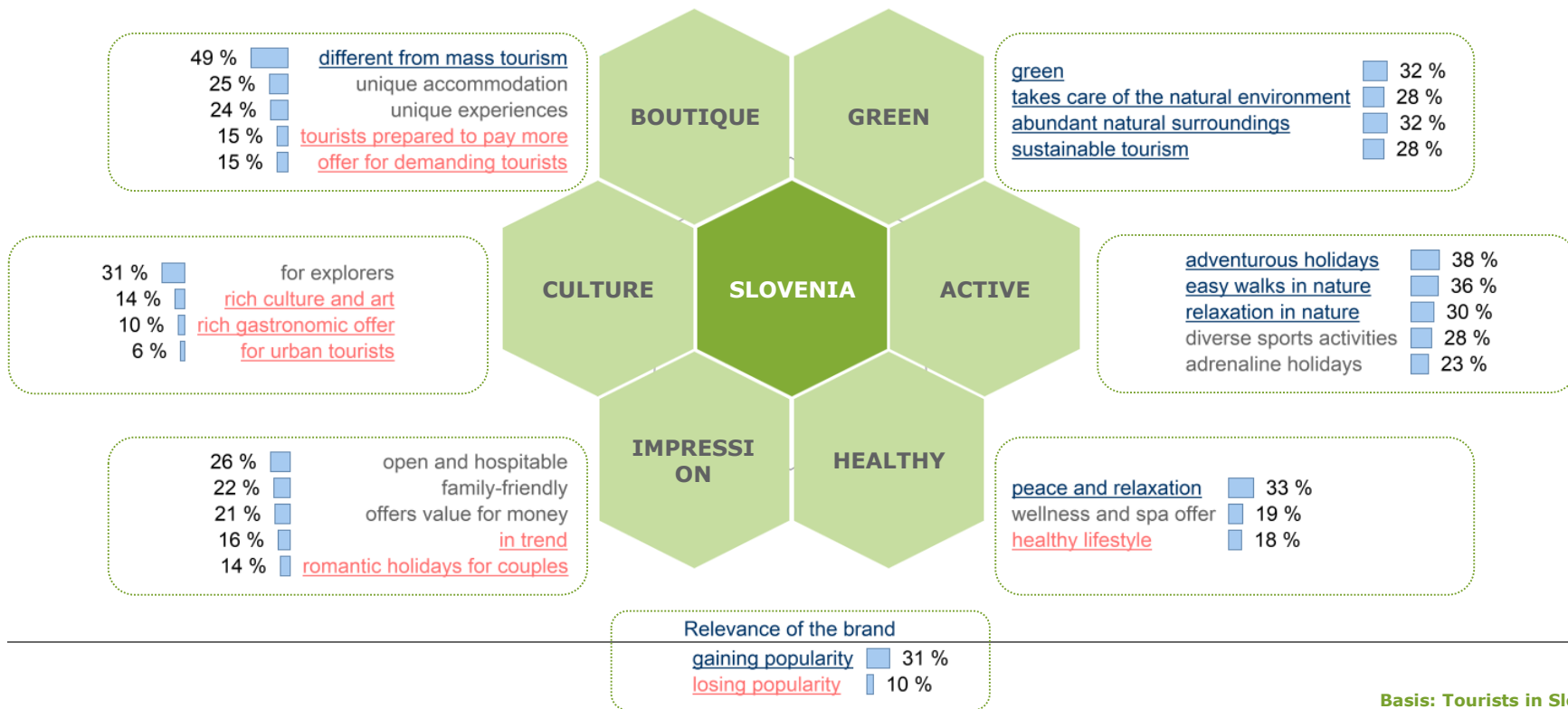
*\*interesting elements are in the upper section of the image (influential), the best ones are on the right side (important)*



Weaker association of Slovenia ← → Stronger association of Slovenia

## NOTES:

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



**Basis: Tourists in Slovenia**

**NOTES:**

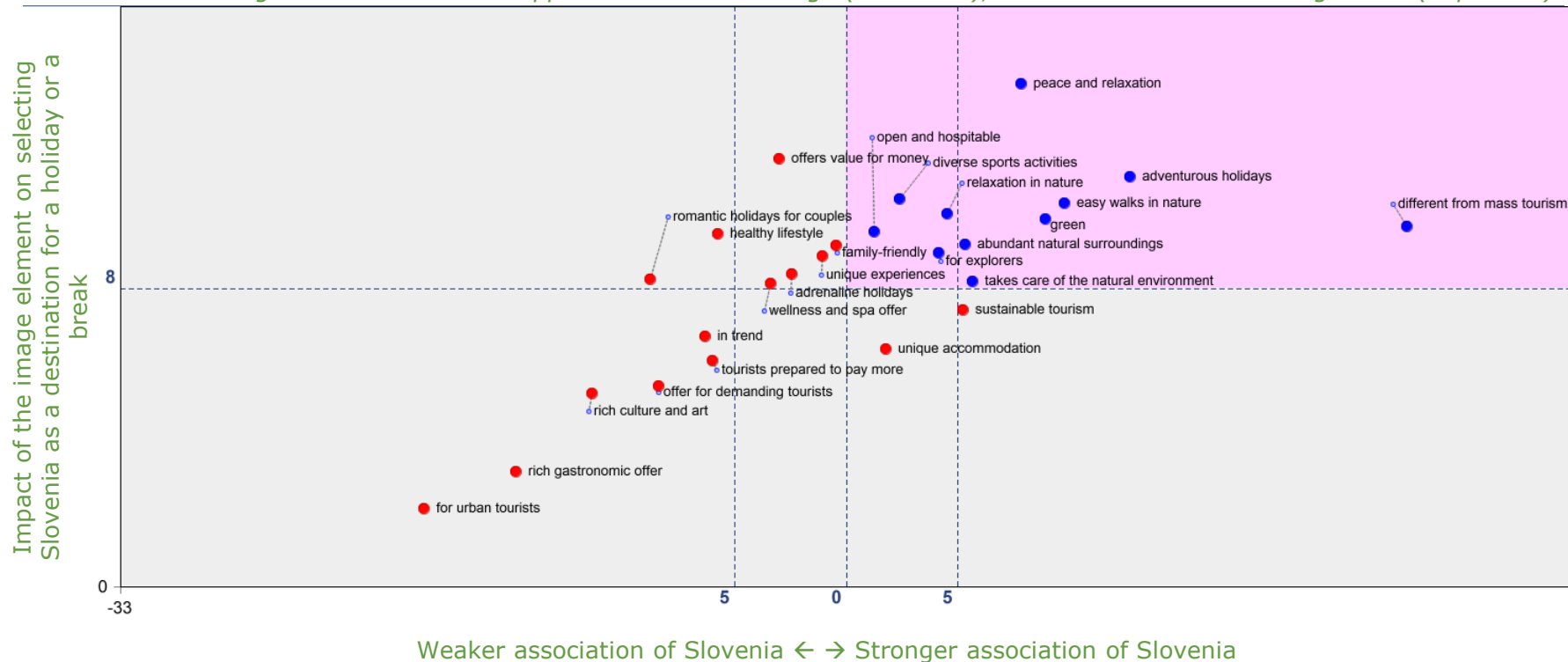
The prism shows all elements linked to the image of the destination, which are divided into six key dimensions of the image. The elements are classified according to a descending order for each individual dimension. The elements deviating statistically significantly in a positive way are underlined and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

# UK: 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.

# UK: Destination image

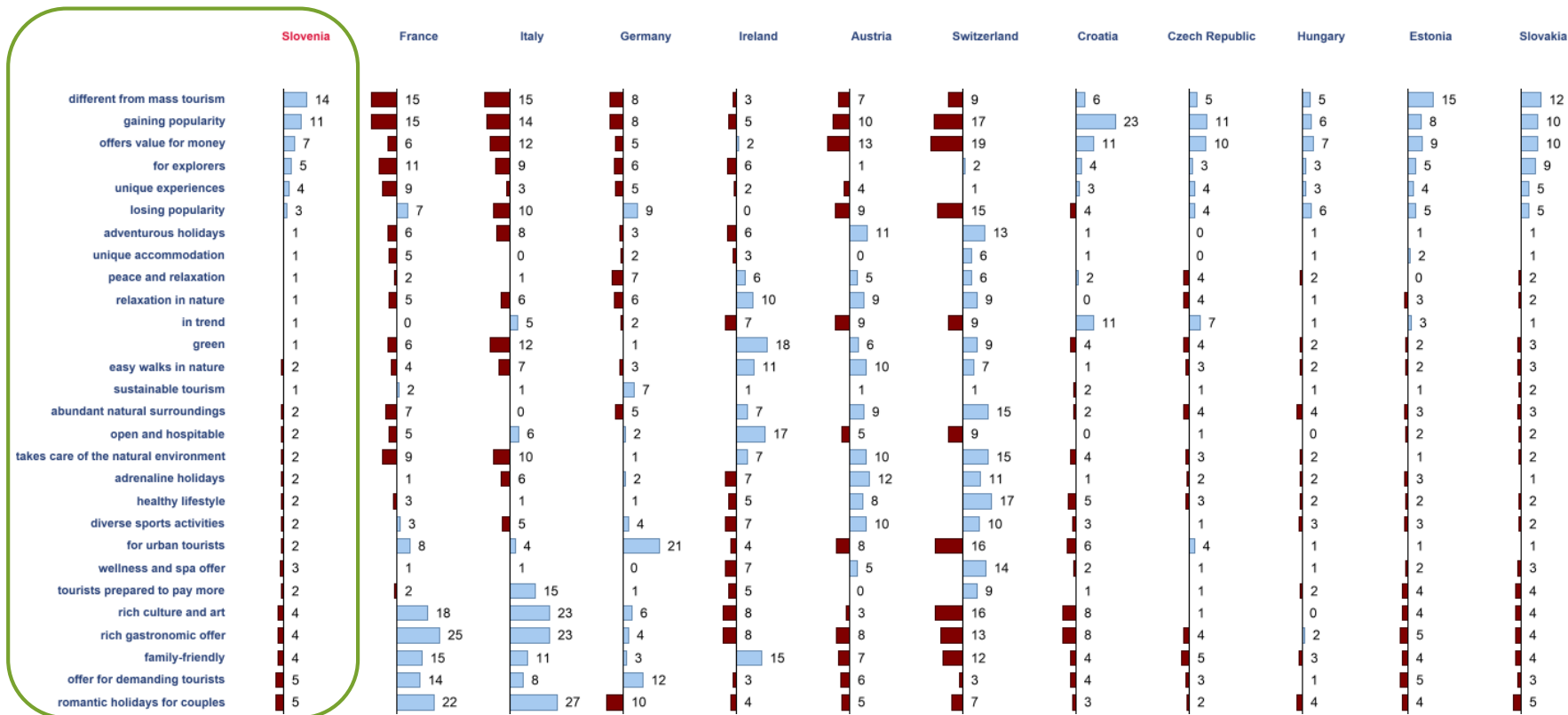


**NOTES:**

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.



# UK: 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**

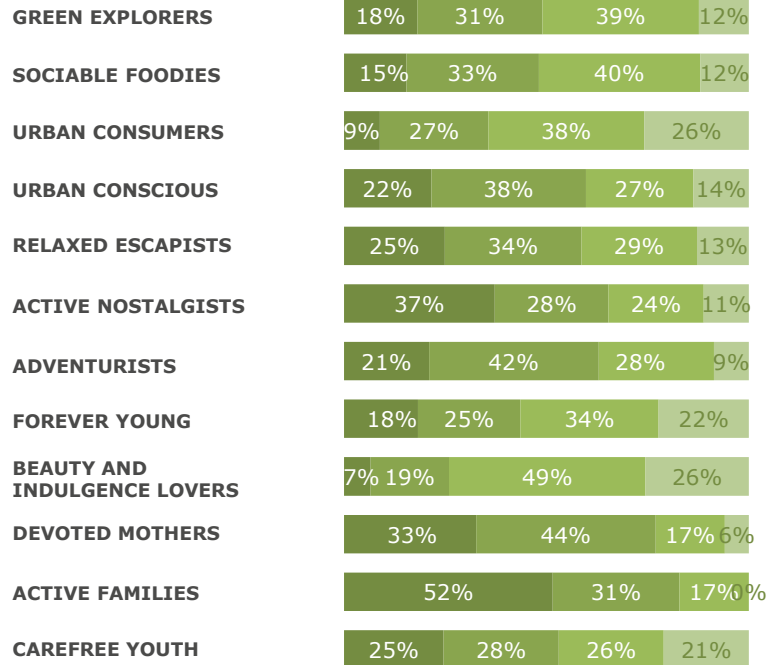


# UK: Knowledge of, and experience with, Slovenia



## KNOWLEDGE OF SLOVENIA

Basis: sample

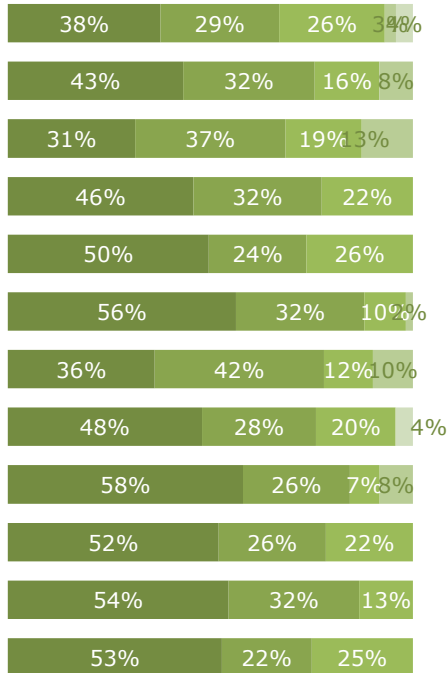


Knowledge:



## SATISFACTION

Basis: visitors to Slovenia

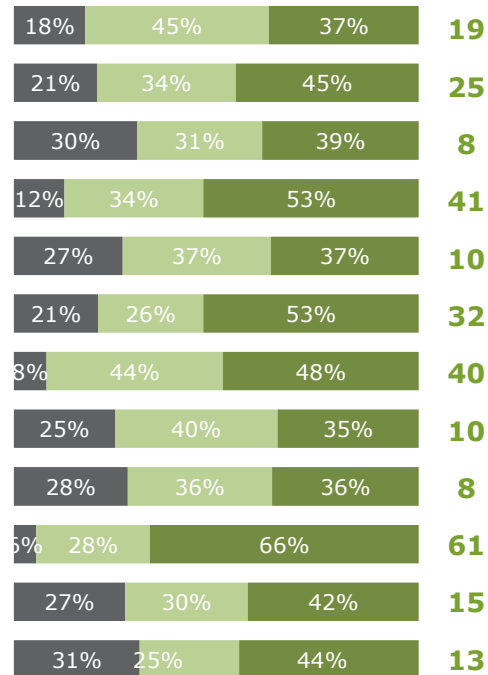


Meeting of expectations:



## NPS – DEGREE OF RECOMMENDATION

NPS Index



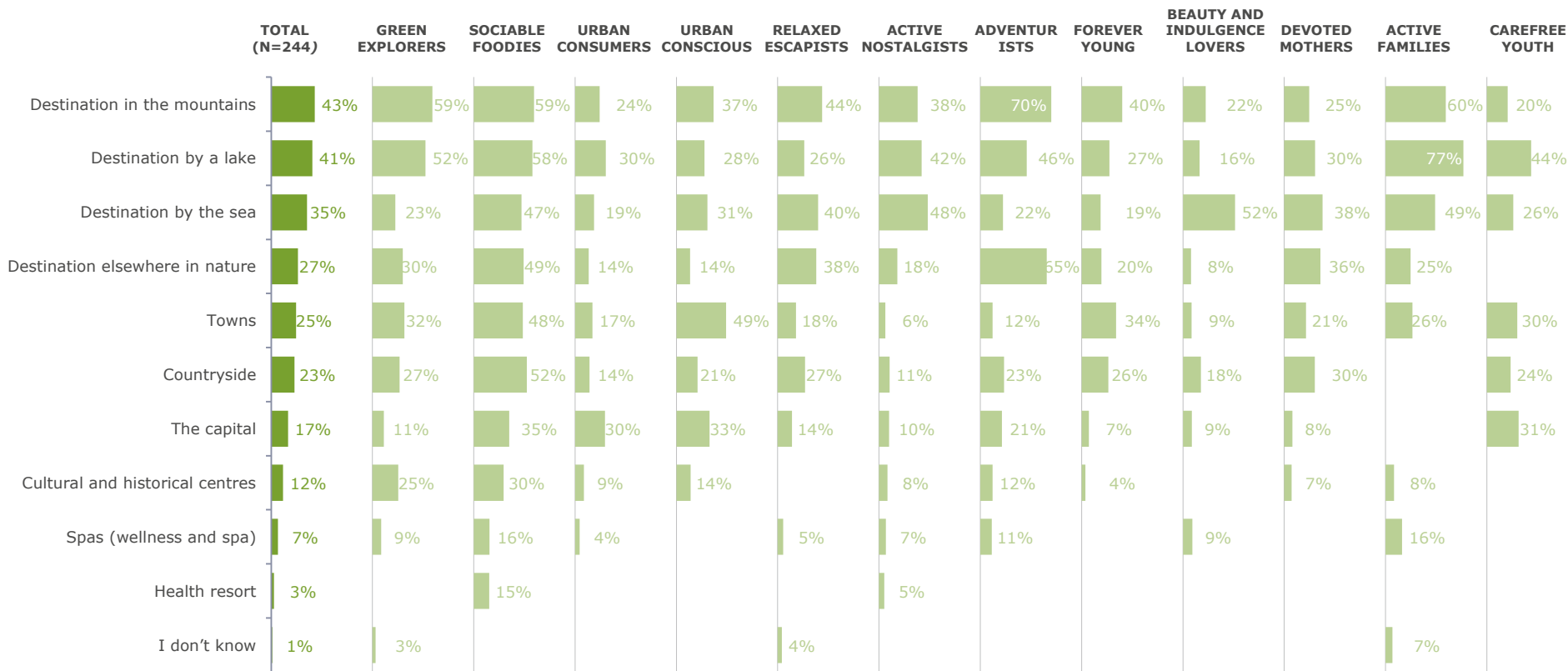
Recommendations:



**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.

## UK: Destination type in Slovenia

Subsample: visitors to Slovenia

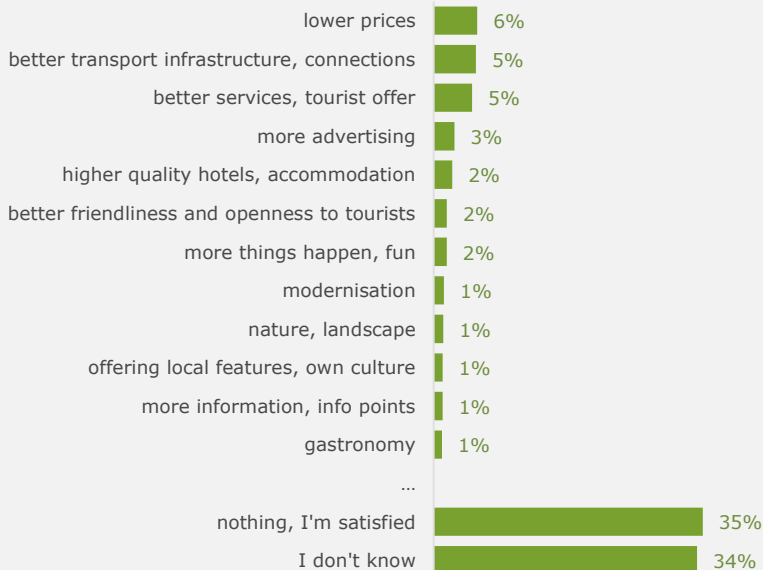


## NOTES:

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=156*

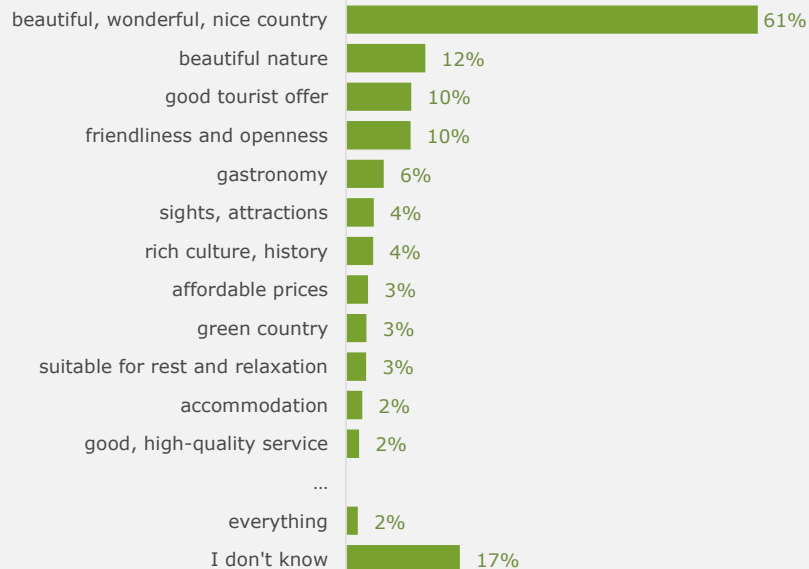


### NOTES:

OTHER STATEMENTS: more attractions, sights, more hotel facilities, accommodation, I'm not familiar enough, unattractiveness of the 'sun and sea' product, ensure more pleasant staying, attractiveness

## Elements of excitement – Top 12

*Promoters (would recommend Slovenia), n=122*

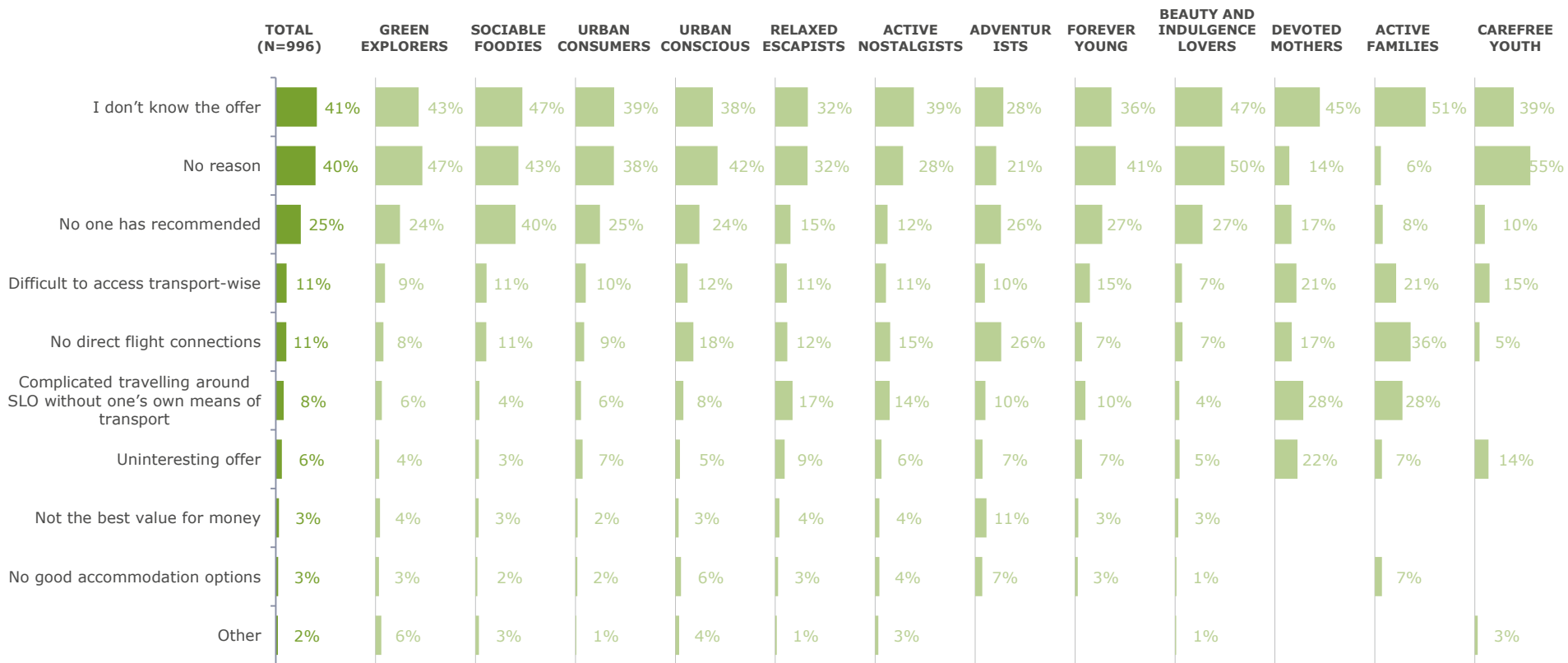


### NOTES:

OTHER STATEMENTS: cleanliness and orderliness, pleasant and fun atmosphere, diverse nature (lakes, mountains, forests)

# UK: Reasons for not visiting

Subsample: non-visitors



## NOTES:

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

# ATTACHMENTS





## Additional explanations

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

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

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

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

## UK: Green explorers (13.6%)



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



## DESTINATION TYPE

Cultural	70%	+37
Nature		

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

TYPE OF  
ACCOMMODATION

Apartment	74%	+27
Hotel		

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

TRANSPORT TO THE  
DESTINATION

Aeroplane	85%	+4
Ship		

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

TRANSPORT AT THE  
DESTINATION

Coach	38%	+8
Taxi		

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

## ACTIVITIES

Sightseeing of old town centres	82%	+26
Natural sightseeing	72%	+24

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

## MOTIVATION

Past experience	57%	+9
Price of the destination	45%	+11

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

## SOURCE OF INFORMATION

Articles on the Internet	58%	+14
Web portals	41%	+11

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

## RESERVATION METHOD

Directly at the accommodation provider	34%	+9
Booking agencies	40%	+2

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

## TRAVELLING WITH

As a couple	51%	+8
Friends	16%	+2
Family	26%	-8
Alone	5%	-3

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

## CHARACTERISTICS:

Size*	5,612,584
Share*	9%
Age	43
Women	52%

Spring	19%
Summer	57%
Shorter trips	2
Longer trips	2

## NOTES:

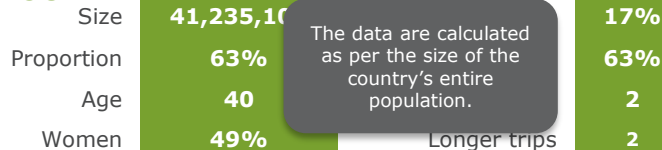
Percentages in the title show the share of the segment according to the entire target group (they travel abroad for a break or holiday). / DATA IN TABLES: positive and statistically significant differences are bold and underlined. The first number shows the percentage of replies for an individual element,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

## UK: 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.

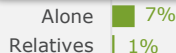
## CHARACTERISTICS OF THE TARGET GROUP:



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?



4x

Frequency of travelling abroad irrespective of the length

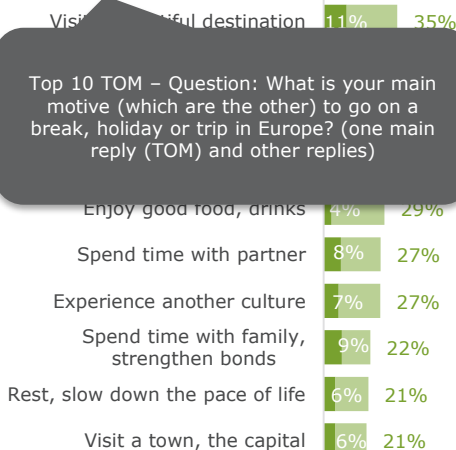
## ACTIVITIES – TOP 10:

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



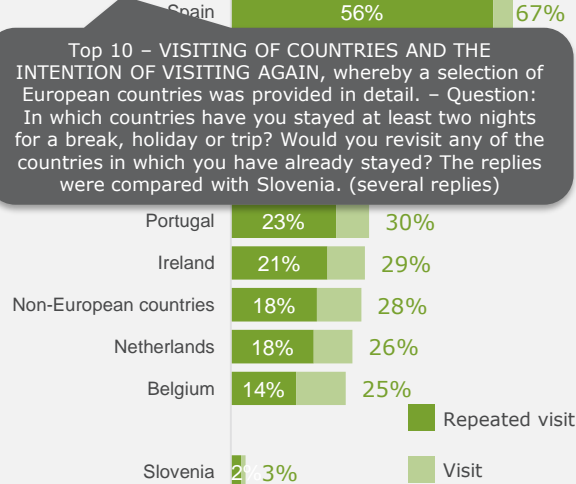
## TRAVEL MOTIVES:

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)



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).

# UK: 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)

16%

## 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



81

To the destination

At the destination (24% TRAIN, 16% ON FOOT, 3% BICYCLE)

MOTORHOME COACH MOTORCYCLE



2

5

Question: What means of transport do you most frequently use to travel to a destination/How do you usually travel from one point to another at a destination of your break, holiday or trip?

## PRICE SENSITIVITY:

Accommodation 76% 6%

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

Additional

Food 13% 68% 19%

Shopping 19% 69% 13%

Most favourable price Value for money Price is irrelevant

## PURCHASE JOURNEY:

### MOTIVATION

### SOURCES OF

### RESERVATION METHOD:

Past 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 34%

Travel literature 32%

Expedia.com 30%

Articles - the Internet 27%

Web portals 30%

Accommodation providers 25%

Potopisna literatura 27%

Agencies 19%

Airbnb 14%

## 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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