ROY MORGAN

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Holiday intention increasing with domestic leading

In the last 12 months, the proportion of Australians planning to take a holiday has increased to 70% the latest findings from the Roy Morgan Holiday Tracking Survey reveal.

This recent increase appears to have been driven primarily by an uptick in domestic holiday intention and steady overseas travel. In the October-December 2016 quarter, 68% of the population had a holiday in the pipeline, with 52% reporting that they were planning an Aussie holiday in the coming 12 months. As of the October-December 2017 quarter, total holiday intention increased to 70% (up 583,000 people), and domestic intention increased to 54% (up 570,000 people).

In contrast, overseas holiday intention is the same as it was a year ago (11%), remaining relatively stable over the last 12 months (up 60,000 people).

Australians intending to take a holiday in the next 12 months
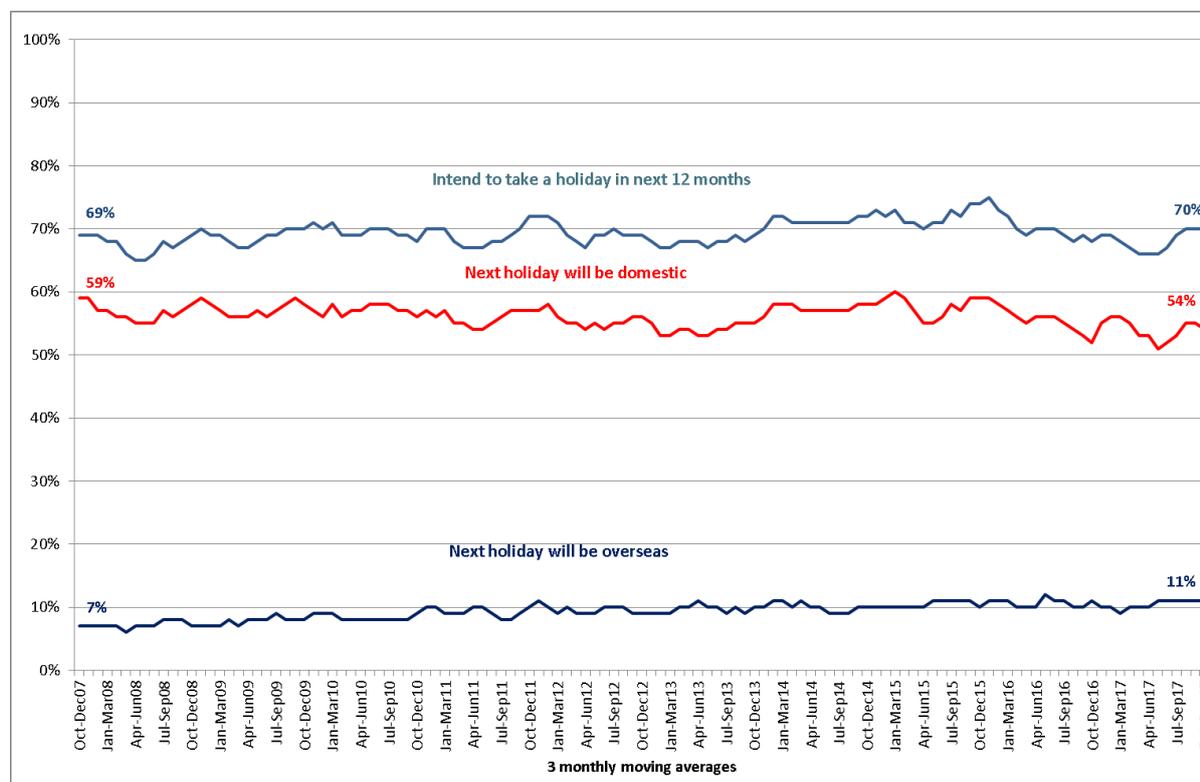
Source: Roy Morgan Single Source (Australia), October 2007-December 2017, average 3-monthly sample=4,465. Base: Australians 14+

Obviously, holiday intention can vary between different segments of the population, with factors such as current life circumstances and even whether they're based in an urban or rural area having a bearing.

For example, holiday intention is markedly higher among parents of kids aged under 16 (74%) than among Aussies in childless households (61%), with this difference applying to both domestic (61% vs 45%) and overseas (10% vs 12%) holidays. 'Empty nesters' are above average for overall intention (77%) due to the elevated proportion of them planning a domestic holiday (61%), while older folks (aged 65+) are less likely to have any kind of getaway on the horizon.

Furthermore, while 70% of Australians living in capital cities and 65% of those based in regional areas are planning a holiday, it's interesting to see that the former are more likely to have an overseas trip on

the horizon (12%) than the latter (7%), while the reverse is quite even for domestic holiday plans (54.1% of country Australians vs 53.8% of city-dwellers).

Holiday intention by Helix Persona

But to truly understand Australian holiday intention and just how radically it can vary between different sectors of society, Roy Morgan's consumer-profiling tool Helix Personas is second to none. Breaking down the population into seven Communities comprised of 56 distinct segments (Personas) based on demographics, lifestyle, attitudes, behaviour and values, Helix allows us to pinpoint precisely those Australians most (and least) likely to be planning a holiday in the next 12 months.

Not surprisingly, the Persona with the strongest overall holiday intention (at 89%) comes from the upwardly mobile end of the spectrum: the highly ambitious and well earning, socially aware 'Young and Platinum'. While these well-educated, high income, inner city professionals neither top the scale for overseas or domestic intention, elevated proportions of the Persona have international and domestic travel plans – hence their high ratings for overall intention.

Helix Personas *most* and *least* likely to be planning a holiday in the next 12 months
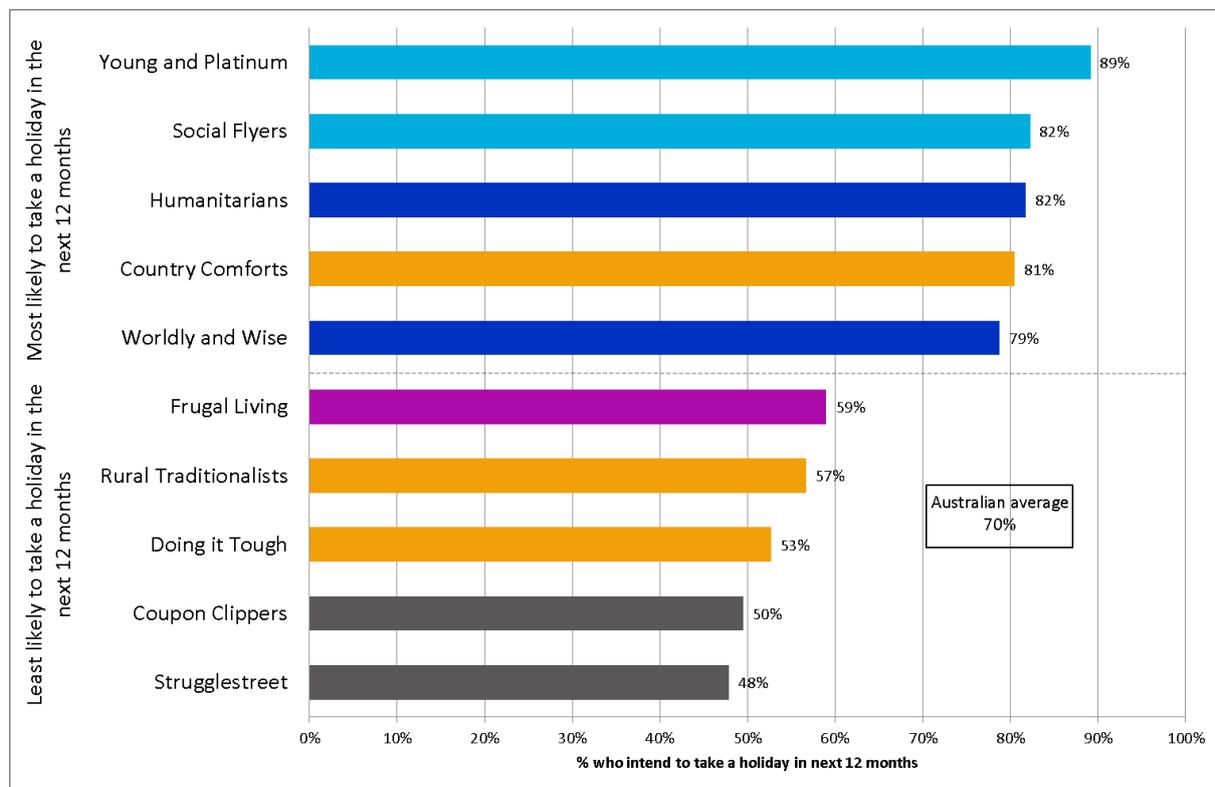
Source: Roy Morgan Single Source (Australia), 12 months to December 2017, sample=9,700. **Base:** *Australians 14+*

Though the other Personas most likely to be planning a holiday in the next 12 months are distinguished by factors such as age, family circumstances and destination preference, they are all similarly socio-economically advantaged, belonging to the high-value Leading Lifestyles and Metrotech Communities.

Meanwhile, people from the Persona known as Strugglestreet are the least likely group in the country to have any kind of holiday plans in the pipeline. As their name suggests, people on Strugglestreet don't have it easy. Over indexing on Semi or unskilled workers and the unemployed, their budget simply doesn't stretch to holidays.

Also limited by financial constraints (due to either unemployment or under-employment), Coupon Clippers are also among the least likely to be planning a holiday. So too are the Doing It Tough, Rural Traditionalists, and the elderly, retired Frugal Living group, content with their low-key, local lifestyle.

Michele Levine, CEO, Roy Morgan Research, says:

"In the 12 months to December 2017, the proportion of Australians planning a holiday in the next year increased to 70%. While it might be tempting to attribute this recent growth to external worldwide events and global destination, Roy Morgan data shows this increase in domestic intention rather than overseas.

"Helix Personas can assist travel and tourism industry players keen to identify those people most likely to travel within Australia on their next trip. Admittedly, holiday intention is closely linked to socio-economic circumstances, but even among high-income earners, attitudes to travel, accommodation and destinations can vary dramatically. Regional tourism operators and travel agencies wishing to ensure their marketing campaigns are as strategic and effective as possible stand to benefit from the in-depth, holistic insights Helix Personas can provide."

To learn more about Roy Morgan's travel and tourism data, call (**+61) (3) 9224 5309 or email askroymorgan@roymorgan.com.**

Please click on this link to the Roy Morgan Online Store.

About Roy Morgan

Roy Morgan is the largest independent Australian research company, with offices in each state of Australia, as well as in the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan has over 70 years' experience in collecting objective, independent information on consumers.

Margin of Error

The margin of error to be allowed for in any estimate depends mainly on the number of interviews on which it is based. Margin of error gives indications of the likely range within which estimates would be 95% likely to fall, expressed as the number of percentage points above or below the actual estimate. Allowance for design effects (such as stratification and weighting) should be made as appropriate.

Sample Size	Percentage Estimate			
	40%-60%	25% or 75%	10% or 90%	5% or 95%
5,000	±1.4	±1.2	±0.8	±0.6
10,000	±1.0	±0.9	±0.6	±0.4
20,000	±0.7	±0.6	±0.4	±0.3
50,000	±0.4	±0.4	±0.3	±0.2