

Discover your edge

Monday, 30 January 2017

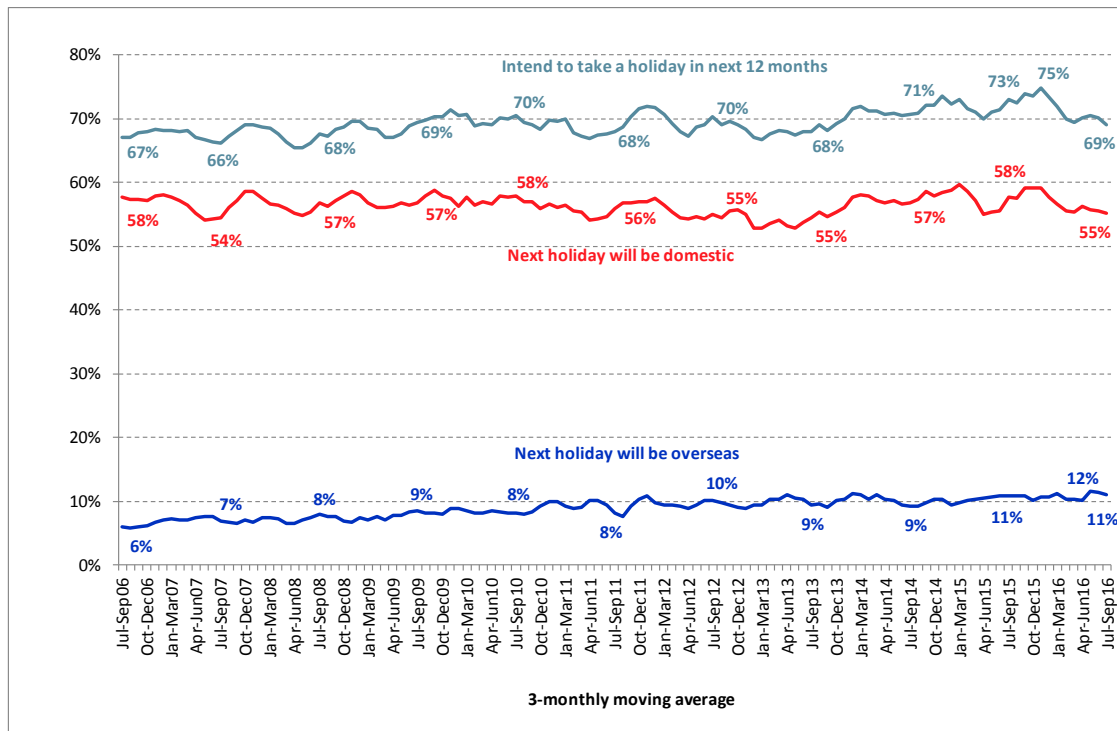
## Overall holiday intention down (but not everyone's staying put)

In the last 12 months, the proportion of Australians planning to take a holiday has slipped from 73% to its lowest point in almost three years (69%), the latest findings from the Roy Morgan Holiday Tracking Survey reveal.

This recent downturn appears to have been driven primarily by declining domestic holiday intention. In the July-September 2015 quarter, 73% of the population had a holiday in the pipeline, with 58% reporting that they were planning an Aussie holiday in the coming 12 months. As of the July-September 2016 quarter, total holiday intention had dropped to 69%, and domestic intention was at 55%.

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

### Australians intending to take a holiday in the next 12 months



**Source:** Roy Morgan Single Source (Australia), July 2006-September 2016, average 3-monthly sample=4,677.  
**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.

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For example, holiday intention is markedly higher among parents of kids aged under 16 (73%) than among Aussies in childless households (68%), with this difference applying to both domestic (58% vs 54%) and overseas (13% vs 11%) holidays. ‘Empty nesters’ are above average for overall intention (78%) due to the elevated proportion of them planning a domestic holiday (64%), while older folks (aged 65+) are less likely to have any kind of getaway on the horizon.

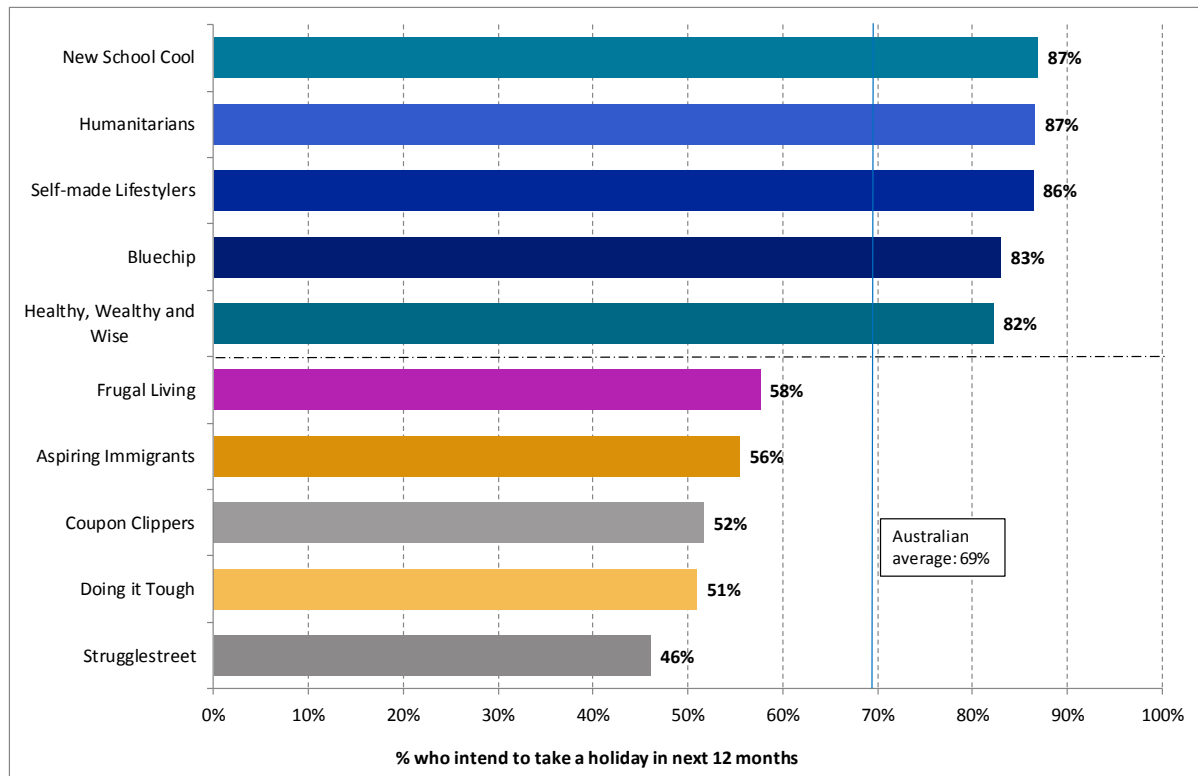
Furthermore, while the same proportion (69%) of Australians living in capital cities and those based in regional areas are planning a holiday, it’s interesting to see that the former are more likely to have an overseas trip on the horizon (12%) than the latter (9%), while the reverse is true of domestic holiday plans (57% of country Australians vs 54% 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 two Personas with the strongest overall holiday intention (at 87% apiece) come from the upwardly mobile end of the spectrum: educated, high-earning ‘[Humanitarians](#)’ and the slightly younger, socially aware (but no less well paid) ‘[New School Cool](#)’. While neither tops the scale for overseas or domestic intention, elevated proportions of both Personas 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 Research (Australia), October 2015-September 2016, n=14,416. **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. Often young single parents with little education and a high unemployment rate, their budget simply doesn't stretch to holidays.

Also limited by financial constraints (due to either unemployment or under-employment), [Doing It Tough](#) and [Coupon Clippers](#) are also among the least likely to be planning a holiday. So too are the ethnically diverse, hard-working families of the [Aspiring Immigrants](#) Persona (although this ambitious group may well change their circumstances in the future); and the elderly, retired [Frugal Living](#) group, content with their low-key, local lifestyle.

**Norman Morris, Industry Communications Director, Roy Morgan Research, says:**

*"In the 12 months to September 2016, the proportion of Australians planning a holiday in the next year went from a record high to its lowest point in nearly three years. While it might be tempting to attribute this decline to recent international terrorist activity such as the Bastille Day attack in Nice, Roy Morgan data shows a downturn in domestic rather than overseas intention.*

*"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."*

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#### **Related research findings**

Browse our extensive [range of Travel and Tourism reports and profiles](#), including [Destination Intention profiles](#), [Holiday Attitudes](#) and [Travel Information Sources](#). Alternatively, check out the [Helix Personas website](#) to learn more about how this powerful segmentation system can help your business.

Roy Morgan's travel and tourism research quantifies the dollar-value of the tourism industry's diverse markets; and includes detailed information and insights into what activities people look for when travelling, who they travel with, where they get their information, whose advice they seek when planning a holiday and much more.

**Roy Morgan Research Ltd.** A.B.N. 91 007 092 944 Quality System Certified to AS/NZS ISO 9001

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### About Roy Morgan Research

Roy Morgan Research is the largest independent Australian research company, with offices in each state of Australia, as well as in Indonesia, the United States and the United Kingdom. A full service research organisation specialising in omnibus and syndicated data, Roy Morgan Research 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
7,500	±1.1	±1.0	±0.7	±0.5
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