

# Industry Research and Insights Update

COVID-19 tourism industry recovery insights | Tourism Tasmania  
November 2021

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This report summarises consumer, market and industry insights alongside accommodation demand data, providing a snapshot of the current COVID-19 recovery scenario for Tasmania's visitor economy.





Cover image: Pieman River, Rob Mulally

# Recovery Update

COVID-19 recovery tracking insights | Tourism Tasmania  
November 2021

## Industry update

Tourism Tasmania is actively tracking the recovery of the tourism and hospitality industry, with regular updates through T21 visitor economy strategy and the [industry recovery portal](#). This report focuses on industry recovery by providing a view forward through consumer and industry insights, and data.

### Travel sentiment sharply impacted by outbreaks

*Latest insights are from mid-October, including impacts from the Sydney and Melbourne lockdowns, and initial easing of restrictions in New South Wales.*

Following sharp declines in July and August, national travel sentiment is optimistic, with over half (57%) of Australians now intending to travel domestically in the next 6 months. The unveiling of re-opening plans and the easing of restrictions, as well as the upcoming holiday period may be supporting this positive shift. (October 15-17 2021, Tourism Australia).

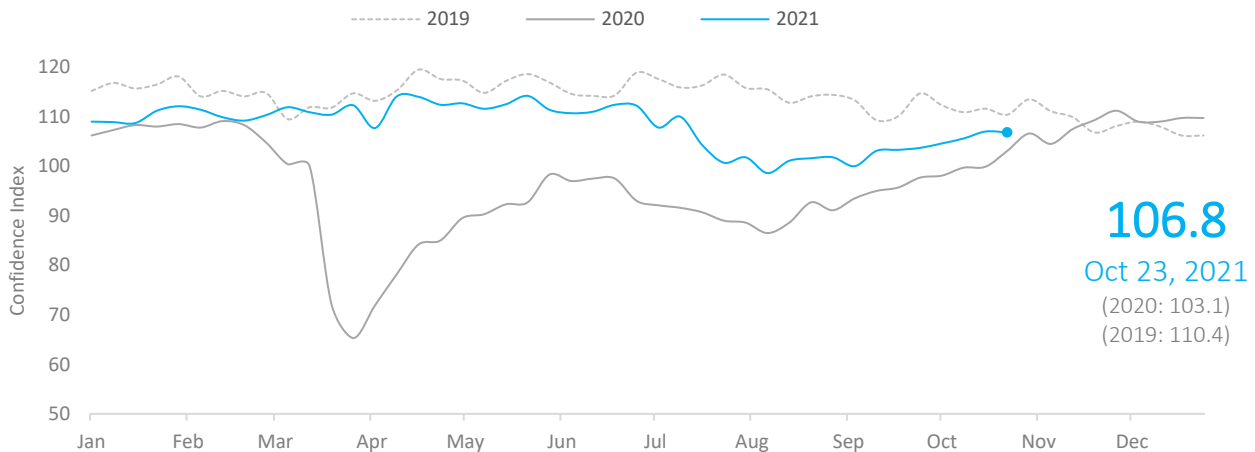
### Tasmania's brand health maintained

Tasmania's brand health has held its position in the market, with more Australians continuing to move back into the 'active' stages of holiday planning. However, the lockdowns in NSW and VIC were only just beginning during the survey period, so it should be expected that the improvement in those 'active' in the planning process may slow in the next report. (TIM, Jun '21).

### Consumer Confidence Index

The ANZ-Roy Morgan [Consumer Confidence](#) Index provides a measurement of Australians' overall confidence across key indicators including personal finance, the national economy, and timing of major purchases.

Following a relatively stable period of Consumer Confidence until late June, the outbreaks and lockdowns in New South Wales and Victoria has seen the Consumer Confidence index remain below 2019 levels, however with steadily improving confidence since these states announced their reopening roadmaps.



# COVID-19 Accommodation Forward Bookings

Tourism Tasmania measures a range of metrics of visitation into the state and across the visitor economy. This has traditionally been predominantly an historical insight, for example through the Tasmanian Visitor Survey, National Visitor Survey and International Visitor Survey.

Accommodation demand is a key indicator of industry and community recovery, and Tourism Tasmania has engaged and worked closely with two providers to deliver meaningful data that broadly represents the range of operators in Tasmania's accommodation sector.

- + **STR:** Hotels, motels and other commercial accommodation with more than three rooms. Forward data focuses on occupancy per cent rates.
- + **AirDNA:** Short-stay accommodation, such as Airbnbs. Forward data includes in this report focuses on demand (booked nights currently in the system).

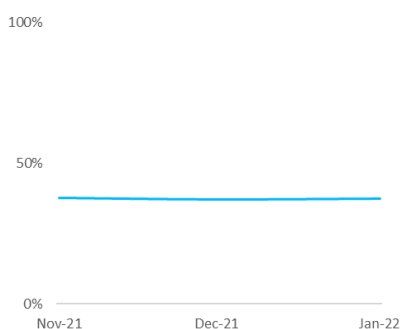
## Hotel, motel, lodges etc

Tourism Tasmania has worked with STR to increase the representation of Tasmanian operators in this platform, which now enables a view of forward occupancy rates. This view is currently available for the Hobart area, with Launceston progressing as more operators participate. The forward occupancy below is representative of the Hobart commercial accommodation market, taking into account operator size, rating, brand affiliation and rates.

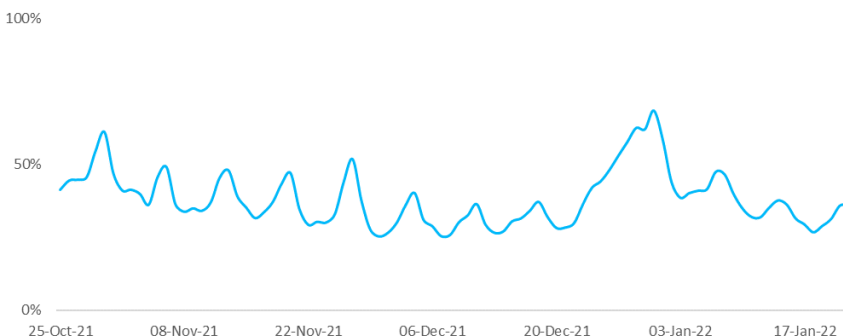
While uncertainty of travel remains in travellers' minds, both NSW and VIC announced roadmaps out of lockdown and will be able to travel to Tasmania from mid-December (subject to Health advice). Demand for the peak Christmas and New Year holiday period is clearly evident.

### Hobart area occupancy on the books | at 25 October 2021

#### Next 3 months



#### Next 90 days



### Help us improve this data

Providers of hotel, motel, lodge and similar accommodation are invited to join the free STR program to help us monitor this important sector. Please contact Tom [tchappel@str.com](mailto:tchappel@str.com) to access your own bespoke complimentary report and contribute anonymously to industry insights and monitoring.

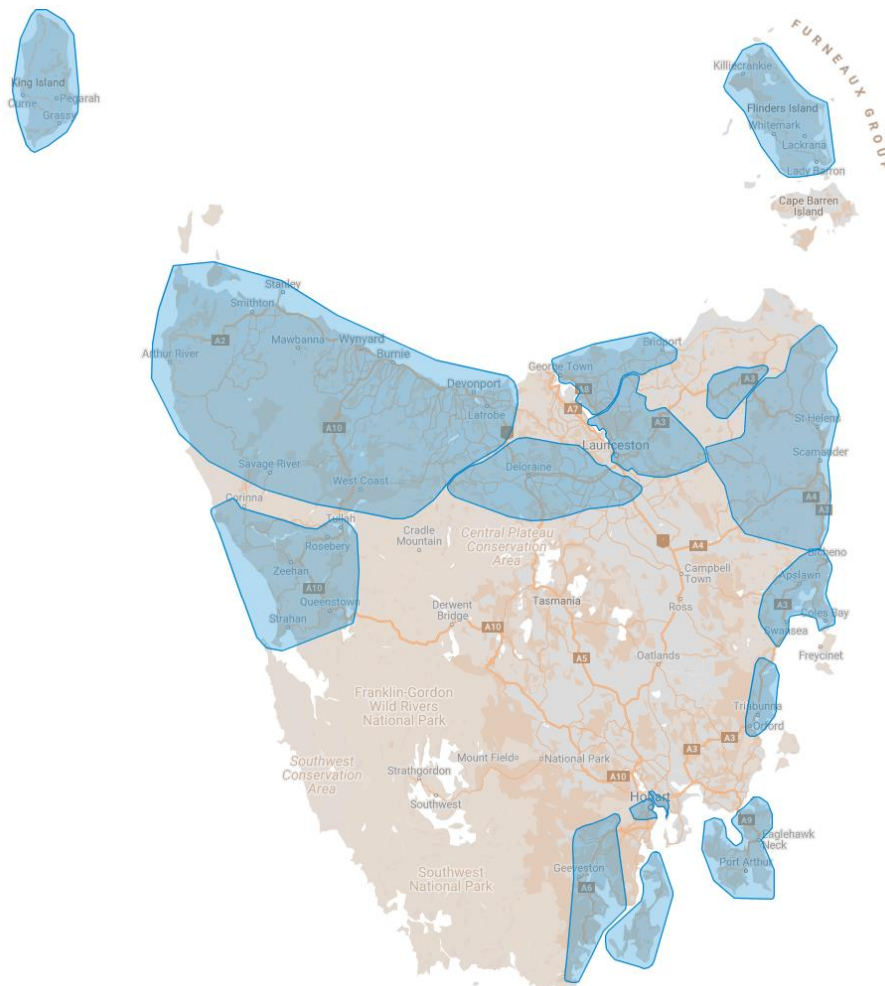
Source: 2021 STR, Inc. / STR Global, Ltd. trading as STR.

The fluctuating line highlights demand for weekend versus weekday stays.

## Short stay accommodation forward bookings

The AirDNA short-stay accommodation **forward demand** (booked nights) data provides insight into this sector of the industry at a state level plus Hobart, Launceston, and regional zones, for the next 12 weeks. The zones have been created to represent a range of urban and regional areas in the state on Airbnb and VRBO; the state level includes all 'entire places' listed in Tasmania in the period.

<p><b>Hobart</b></p> <p>Hobart City Council</p>	<p><b>Launceston</b></p> <p>Launceston City Council</p>	<p><b>West Coast</b></p> <p>West Coast Council</p>	<p><b>Bruny Island</b></p> <p>North &amp; South Bruny</p>
<p><b>Tasman Peninsula</b></p> <p>Tasman Council</p>	<p><b>Huon - Far South</b></p> <p>Huon Valley Council</p>	<p><b>King Island</b></p> <p>King Island Council</p>	<p><b>Flinders Island</b></p> <p>Flinders Council</p>
<p><b>Derby</b></p> <p>Derby, Branxholm, Ringarooma, Pioneer</p>	<p><b>Eastern Shore (Hobart)</b></p> <p>Geilston Bay to Tranmere, Mornington</p>	<p><b>Orford</b></p> <p>Orford, Spring Beach, Triabunna, Little Swanport</p>	<p><b>Freycinet</b></p> <p>Coles Bay, Swanwick, Bicheno, Swansea</p>
<p><b>North West</b></p> <p>7 LGAs:</p> <p>Circular Head, Waratah-Wynyard, Burnie, Devonport, Central Coast, Kentish and Latrobe</p>	<p><b>North East Coast</b></p> <p>Bay of Fires, St Helens, Welborough, Douglas River</p>	<p><b>East Tamar – Bridport</b></p> <p>George Town Council, Bridport</p>	<p><b>Deloraine – Evandale</b></p> <p>Deloraine, Mole Creek, Westbury, Evandale</p>



The table below provides a comparison of demand for the next three months, compared to the same time last year and two years ago. Additionally, the last three columns allow comparison of share of the total state demand (booked nights) by region, highlighting the impacts to city and urban stays in as Tasmanians looked for regional escapes.

**AirDNA** | Demand (booked nights) in the **next 3 months** | 25 October 2021 to 10 January 2022

	This year	Last year	% change	Two years ago	% change	% share of state demand for this period in:		
						2021	2020	2019
<b>Tasmania</b>	<b>101,092</b>	67,307	<b>50%</b>	120,657	-16%			
Hobart	<b>17,164</b>	8,935	92%	28,762	-40%	<b>17.0%</b>	13.3%	23.8%
Launceston	<b>6,887</b>	4,345	59%	11,959	-42%	<b>6.8%</b>	6.5%	9.9%
King Island	<b>848</b>	692	23%	703	21%	<b>0.8%</b>	1.0%	0.6%
Flinders Island	<b>1,153</b>	1,133	2%	464	148%	<b>1.1%</b>	1.7%	0.4%
East Tamar-Bridport	<b>2,799</b>	1,930	45%	2,635	6%	<b>2.8%</b>	2.9%	2.2%
Deloraine-Evandale	<b>2,388</b>	1,447	65%	2,634	-9%	<b>2.4%</b>	2.1%	2.2%
Derby	<b>2,517</b>	1,446	74%	1,947	29%	<b>2.5%</b>	2.1%	1.6%
Orford	<b>2,102</b>	1,881	12%	1,754	20%	<b>2.1%</b>	2.8%	1.5%
Tasman Peninsula	<b>3,255</b>	2,469	32%	3,108	5%	<b>3.2%</b>	3.7%	2.6%
Bruny Island	<b>5,596</b>	4,306	30%	4,659	20%	<b>5.5%</b>	6.4%	3.9%
Huon-Far South	<b>4,449</b>	3,122	43%	4,048	10%	<b>4.4%</b>	4.6%	3.4%
Eastern Shore (Hobart)	<b>1,986</b>	1,356	46%	4,061	-51%	<b>2.0%</b>	2.0%	3.4%
Freycinet	<b>12,107</b>	7,666	58%	11,058	9%	<b>12.0%</b>	11.4%	9.2%
NE Coast	<b>7,867</b>	6,524	21%	6,886	14%	<b>7.8%</b>	9.7%	5.7%
West Coast	<b>2,674</b>	1,648	62%	2,350	14%	<b>2.6%</b>	2.4%	1.9%
North West	<b>9,860</b>	7,128	38%	10,780	-9%	<b>9.8%</b>	10.6%	8.9%

The charts on the following pages provide a view forward over the coming 12 weeks, based on bookings as at the week commencing October 25, 2021. The data refers to properties listed as ‘entire places’, where guests have the whole home/property to themselves (approximately 85% of listed properties in Tasmania).

Each chart also shows bookings relative to the above date, that were in place as of:

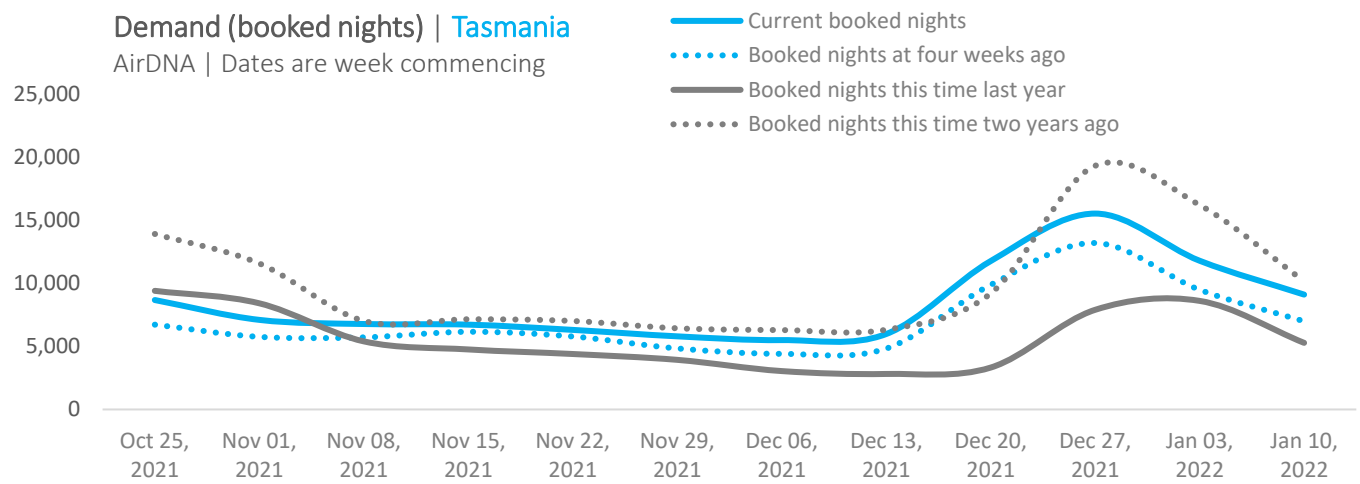
- + **Current demand** | Solid blue line. Booked nights in the system as of the start date.
- + **Last year** | Solid grey line. This refers to the same month in 2020.
- + **Two years ago** | Dotted grey line. This refers to the same month in 2019.

## Tasmania | Short-stay accommodation

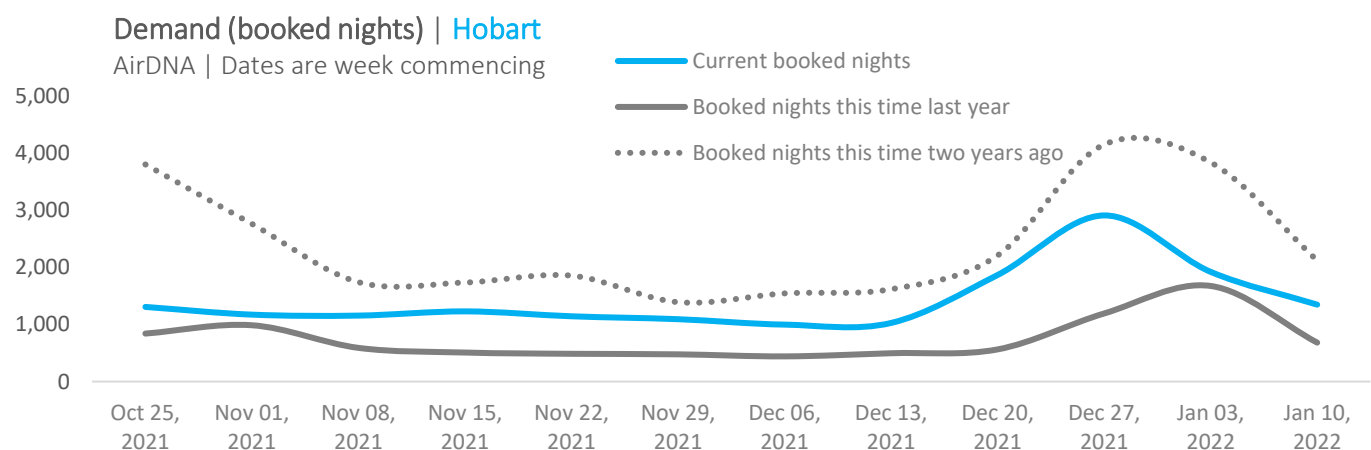
At the state level, demand appears to be holding up remarkably well after a below-2019 levels period through October. Demand over the next three months is 16% behind where it was at this time in 2019, and 50% above this time in 2020 (interstate borders opened at this time). This reporting period includes the reopening of Tasmania’s border to all interstate destinations from December 15, as well as the Christmas and new year period that falls within Tasmania’s busiest tourism period. While demand is still strongest in regional areas, Hobart and Launceston remain below 2019 levels.

Looking further into the period, overall forward demand (booked nights) for short-stay accommodation (solid blue line) is indicating improvements from not only last years’ travel-restricted period (solid grey line), but also against the booked nights that were in the system at this time in 2019 (grey dotted line). Bookings are increasing across the whole period, lifting consistently over the past four weeks.

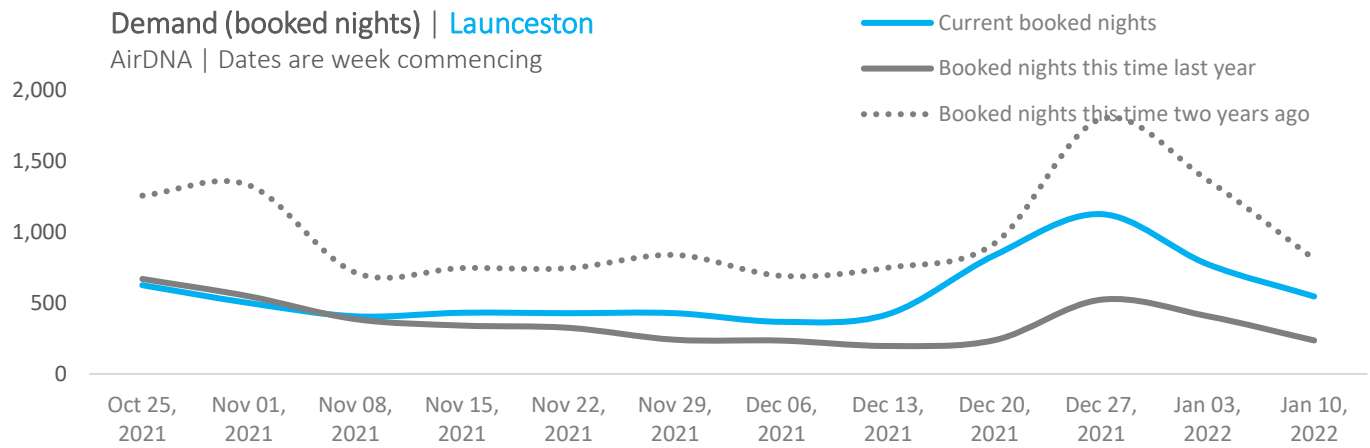
At this time last year, Tasmanians were able to enjoy unrestricted intrastate travel, and interstate travel has just resumed from several interstate destinations.



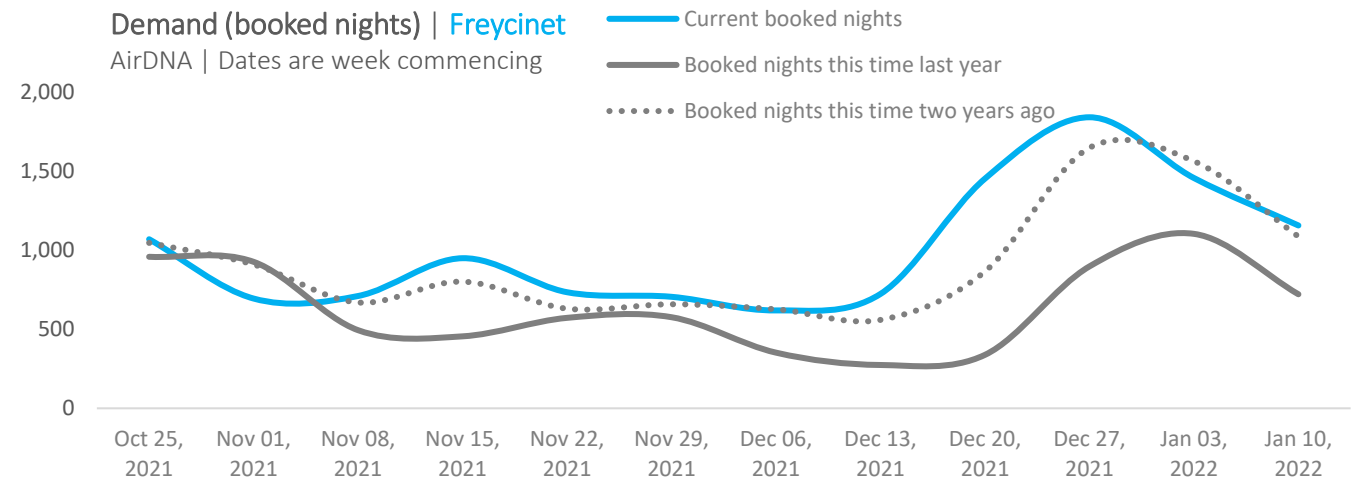
## Hobart | Short-stay accommodation



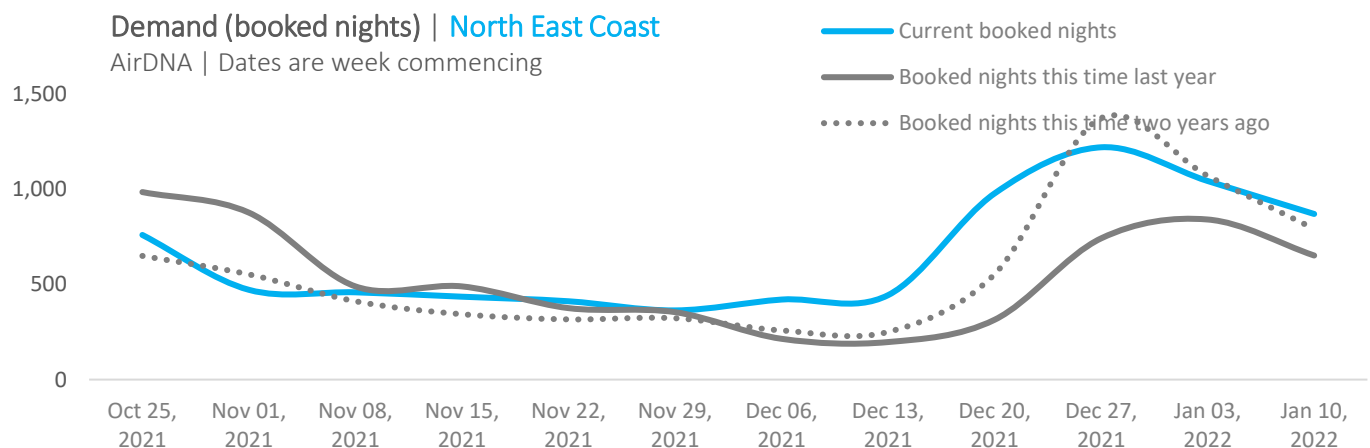
## Launceston | Short-stay accommodation



## Freycinet | Short-stay accommodation

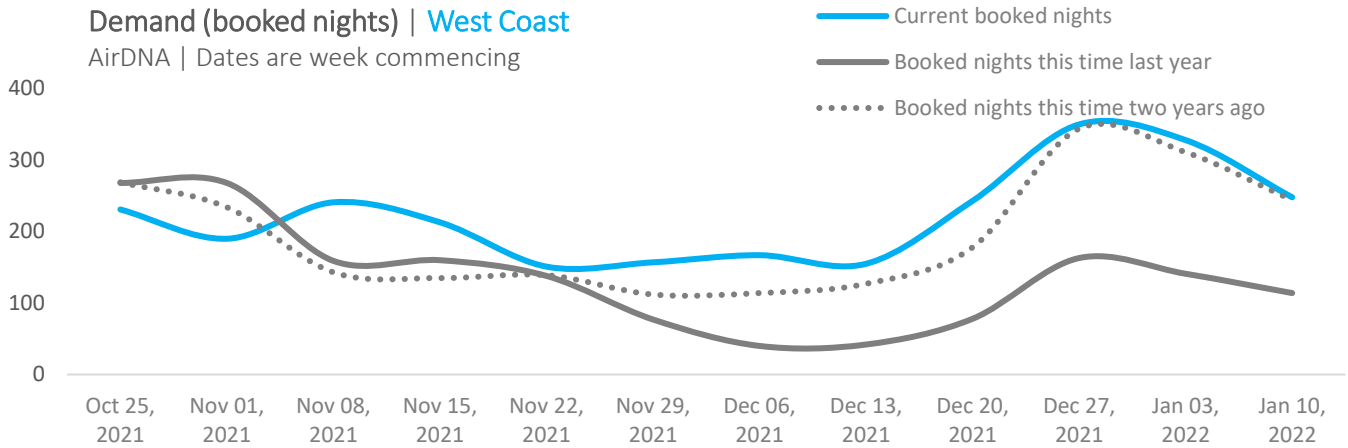


## North East Coast | Short-stay accommodation

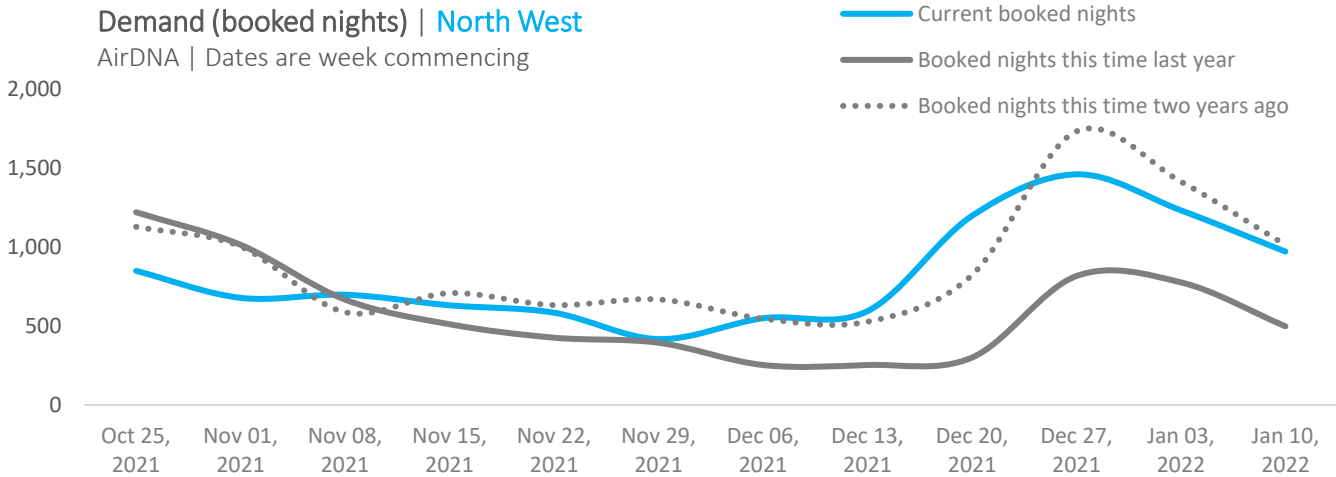




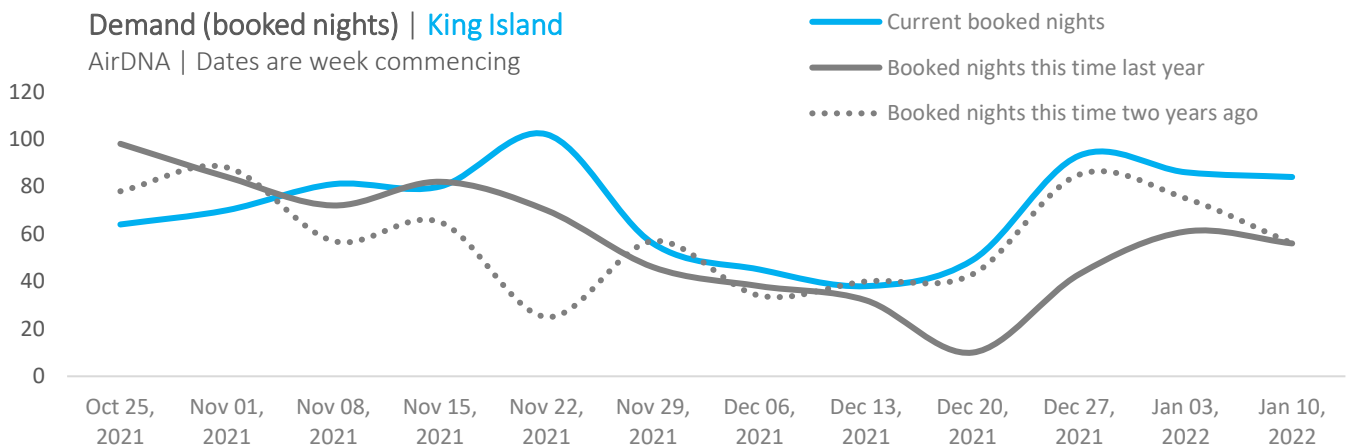
## West Coast | Short-stay accommodation



## North West | Short-stay accommodation

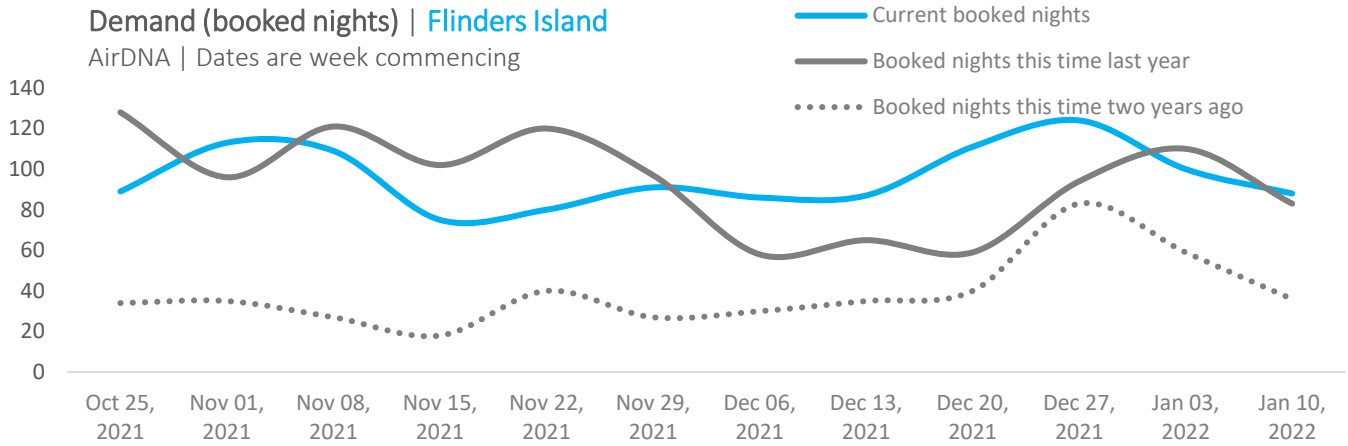


## King Island | Short-stay accommodation

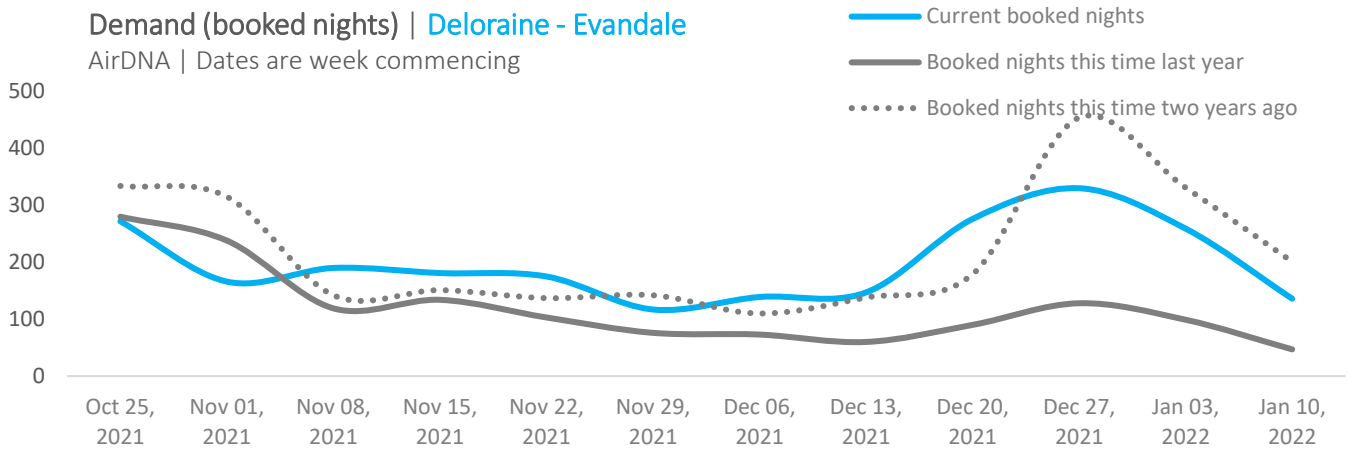




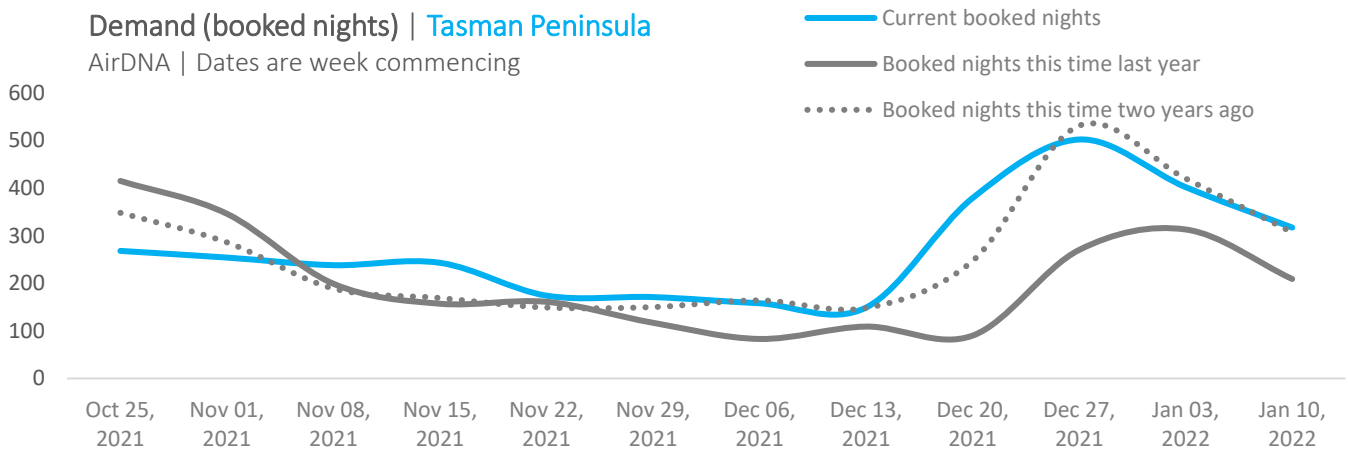
## Flinders Island | Short-stay accommodation



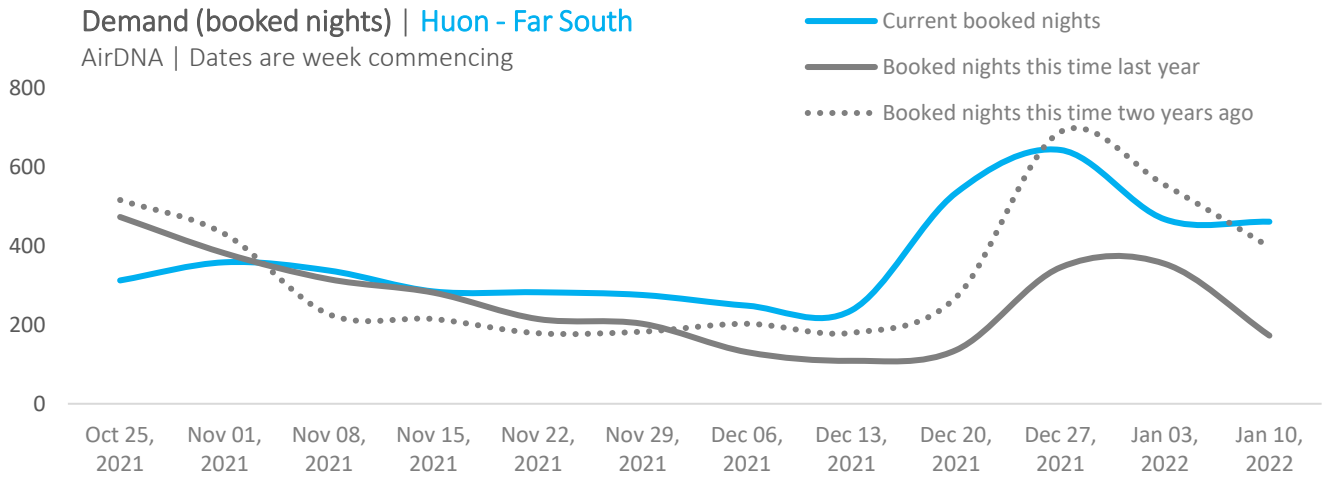
## Deloraine – Evandale | Short-stay accommodation



## Tasman Peninsula | Short-stay accommodation



## Huon – Far South | Short-stay accommodation



## Eastern Shore (Hobart) | Short-stay accommodation

