

# Industry Research and Insights Update

COVID-19 tourism industry recovery insights | Tourism Tasmania  
December 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  
December 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-November, covering periods of easing of restrictions in Victoria and New South Wales. This fieldwork was completed before the omicron variant had emerged.*

National confidence and travel intention has levelled, with booking intention and perceptions of safety within Australia continuing to recover. Currently around a third of Australians are actively researching and planning their next holiday (November 15-23 2021, Tourism Australia).

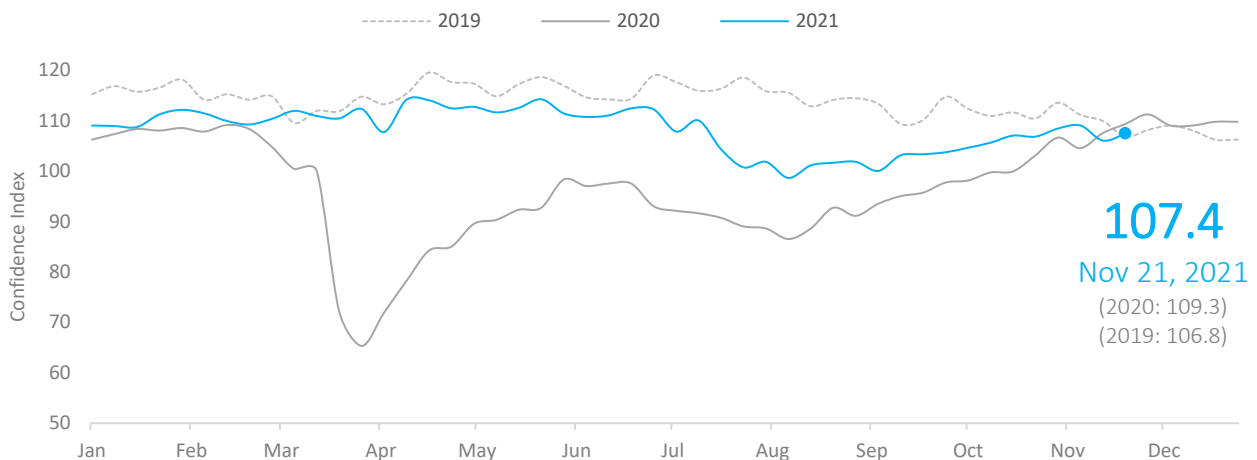
### Consumer Confidence Index

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 outbreaks and lockdowns in New South Wales and Victoria from mid-2021, the Consumer Confidence index has steadily improved since states announced their reopening roadmaps and easing of restrictions.

### Tasmania's brand health maintained

Tasmania continues to maintain its brand position, including perceptions of Tasmania as 'meaningful' and 'different'. Encouragingly, despite the broader domestic market being impacted by lockdowns, travellers remain engaged with planning holidays in Tasmania. There is an increase in those 'active' in the planning stages, which brings an optimistic outlook as unrestricted travel is on the horizon (TIM, Sep '21).



# 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.

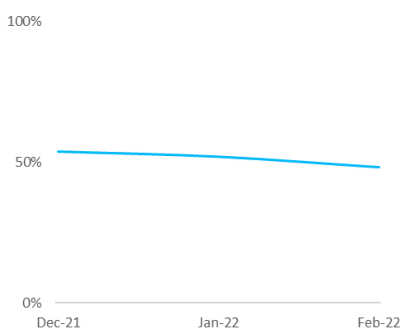
While uncertainty of travel remains in travellers' minds, all states and territories will be able to travel to Tasmania from mid-December (subject to Health advice). Demand for the peak Christmas and New Year holiday period is clearly evident.

### Hobart area occupancy on the books | at 29 November 2021

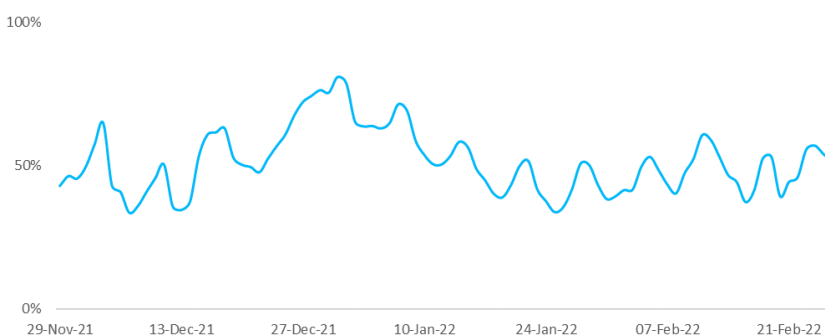
#### Help us improve this data

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.

#### Next 3 months



#### Next 90 days



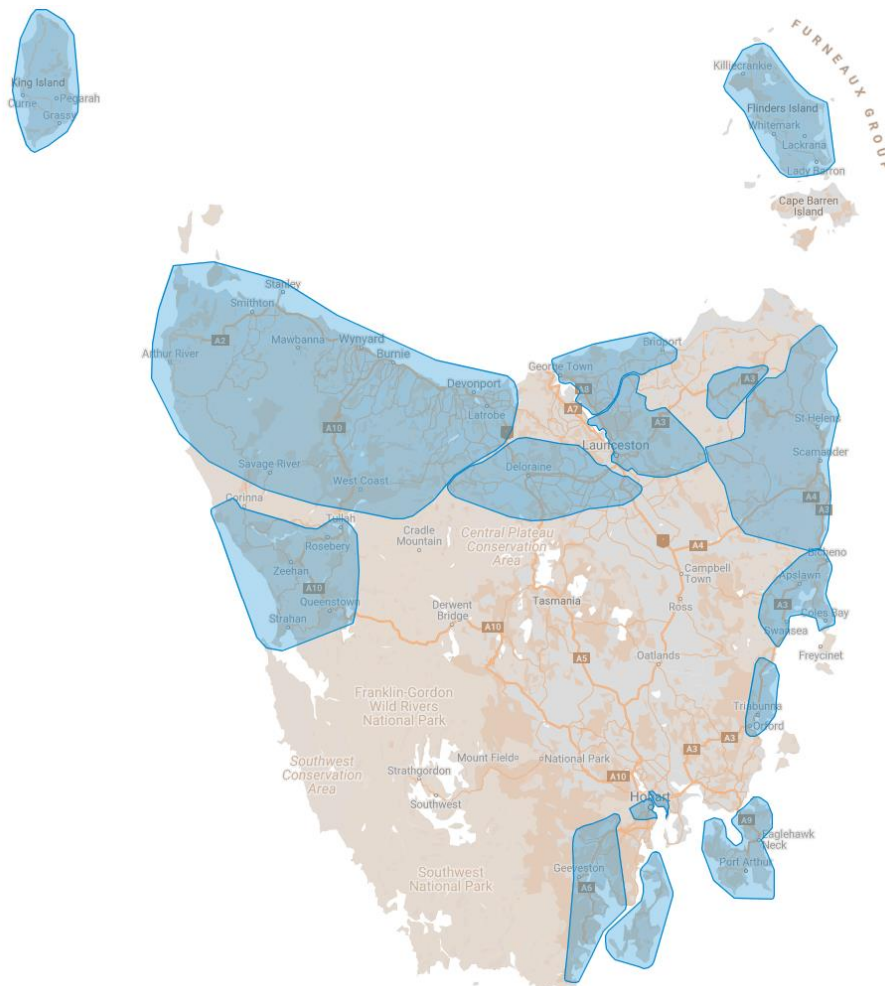
Source: 2021 STR, Inc. / STR Global, Ltd. trading as STR.

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.

## AirDNA | Demand (booked nights) in the next 3 months | 29 November 2021 to 14 February 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>129,368</b>	82,387	<b>57%</b>	140,183	-8%			
Hobart	<b>23,079</b>	13,499	71%	31,686	-27%	<b>17.8%</b>	16.4%	22.6%
Launceston	<b>9,557</b>	5,661	69%	14,637	-35%	<b>7.4%</b>	6.9%	10.4%
King Island	<b>875</b>	744	18%	865	1%	<b>0.7%</b>	0.9%	0.6%
Flinders Island	<b>1,411</b>	1,126	25%	638	121%	<b>1.1%</b>	1.4%	0.5%
East Tamar-Bridport	<b>3,593</b>	2,164	66%	3,509	2%	<b>2.8%</b>	2.6%	2.5%
Deloraine-Evandale	<b>3,320</b>	1,582	110%	3,073	8%	<b>2.6%</b>	1.9%	2.2%
Derby	<b>3,206</b>	1,880	71%	2,121	51%	<b>2.5%</b>	2.3%	1.5%
Orford	<b>2,701</b>	2,144	26%	2,139	26%	<b>2.1%</b>	2.6%	1.5%
Tasman Peninsula	<b>3,594</b>	2,907	24%	3,743	-4%	<b>2.8%</b>	3.5%	2.7%
Bruny Island	<b>6,848</b>	4,661	47%	5,280	30%	<b>5.3%</b>	5.7%	3.8%
Huon-Far South	<b>5,482</b>	3,350	64%	4,493	22%	<b>4.2%</b>	4.1%	3.2%
Eastern Shore (Hobart)	<b>2,723</b>	1,765	54%	4,665	-42%	<b>2.1%</b>	2.1%	3.3%
Freycinet	<b>14,837</b>	9,043	64%	12,274	21%	<b>11.5%</b>	11.0%	8.8%
NE Coast	<b>9,674</b>	7,730	25%	8,941	8%	<b>7.5%</b>	9.4%	6.4%
West Coast	<b>3,282</b>	1,868	76%	2,723	21%	<b>2.5%</b>	2.3%	1.9%
North West	<b>12,497</b>	7,969	57%	12,144	3%	<b>9.7%</b>	9.7%	8.7%

The charts on the following pages provide a view forward over the coming 12 weeks, based on bookings as at the week commencing **November 29, 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:

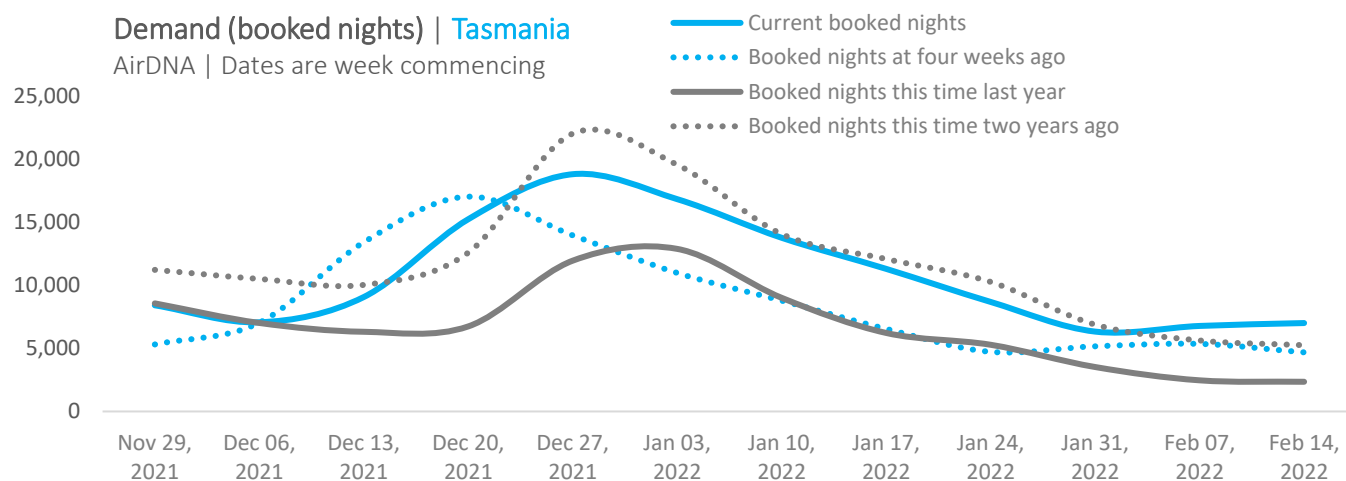
- + **Current demand** | Solid blue line. Booked nights in the system as of the start date.
- + **Last year** | Solid grey line. This refers to the same month in 2020.
- + **Two years ago** | Dotted grey line. This refers to the same month in 2019.

## Tasmania | Short-stay accommodation

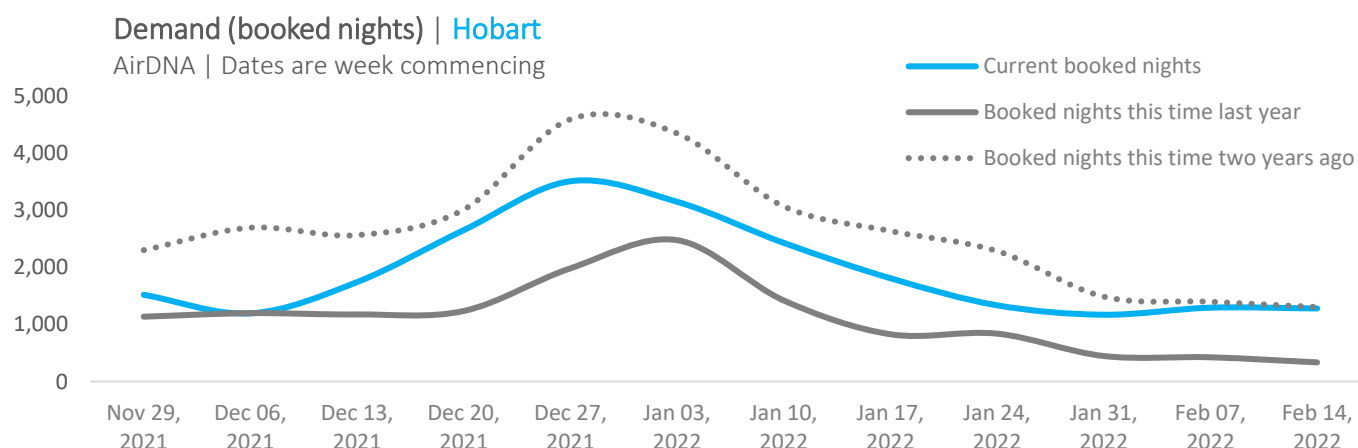
At the state level, demand continues to be holding up remarkably well after a below-2019 levels period through October. Demand over the next three months is 8% behind where it was at this time in 2019, and 57% above this time in 2020 (interstate borders opened at this time). This reporting period includes 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 (27% and 35% lower, respectively).

Looking further into the period, overall forward demand (booked nights) for short-stay accommodation (solid blue line) is indicating improvements from last years’ travel-restricted period (solid grey line), and comparable levels of 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.

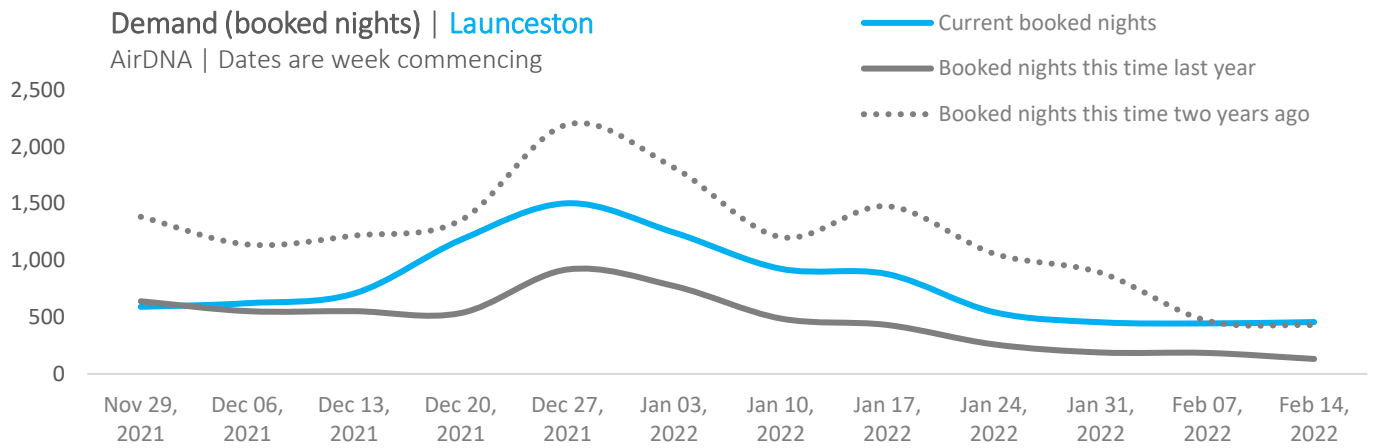
At this time last year, Tasmanians were able to enjoy unrestricted intrastate travel, and interstate travel had resumed from most interstate destinations.



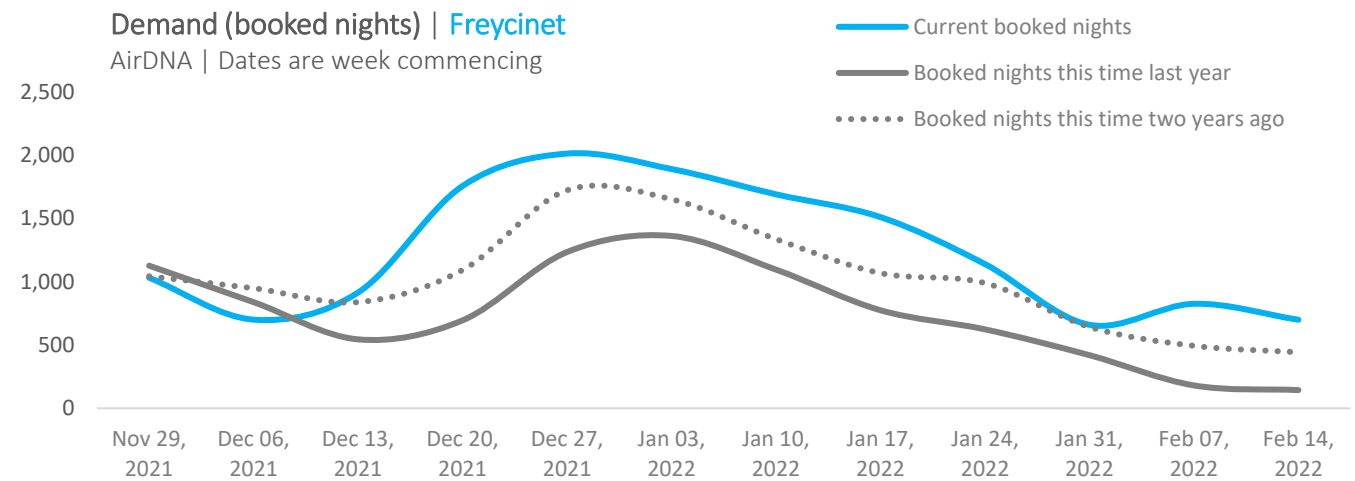
## Hobart | Short-stay accommodation



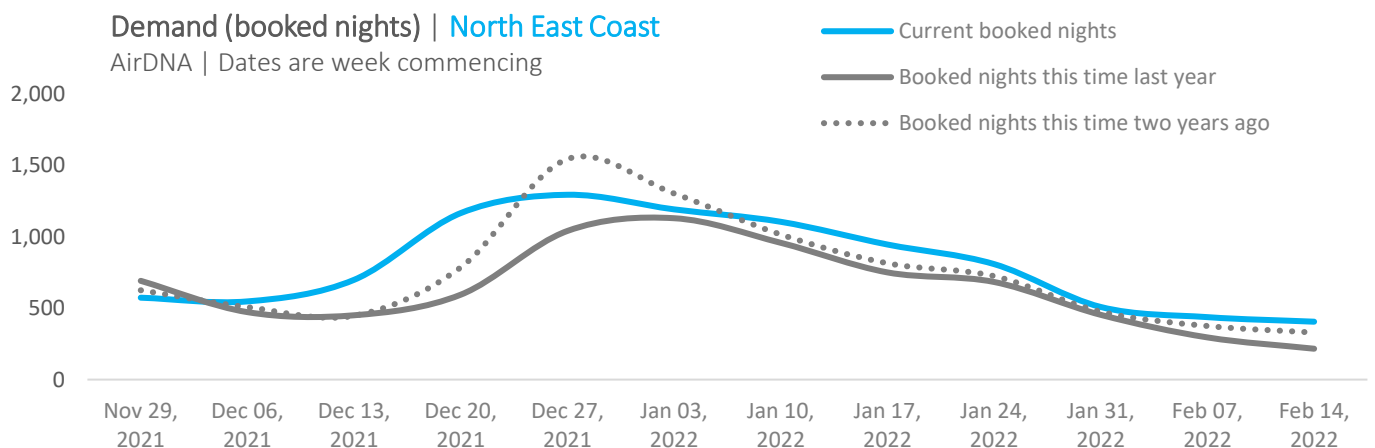
## Launceston | Short-stay accommodation



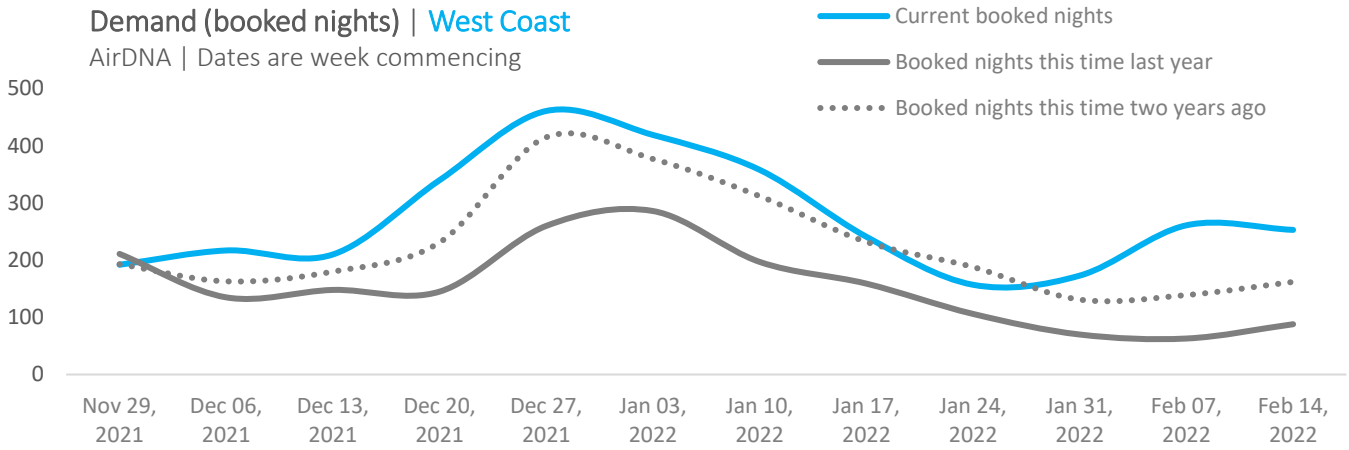
## Freycinet | Short-stay accommodation



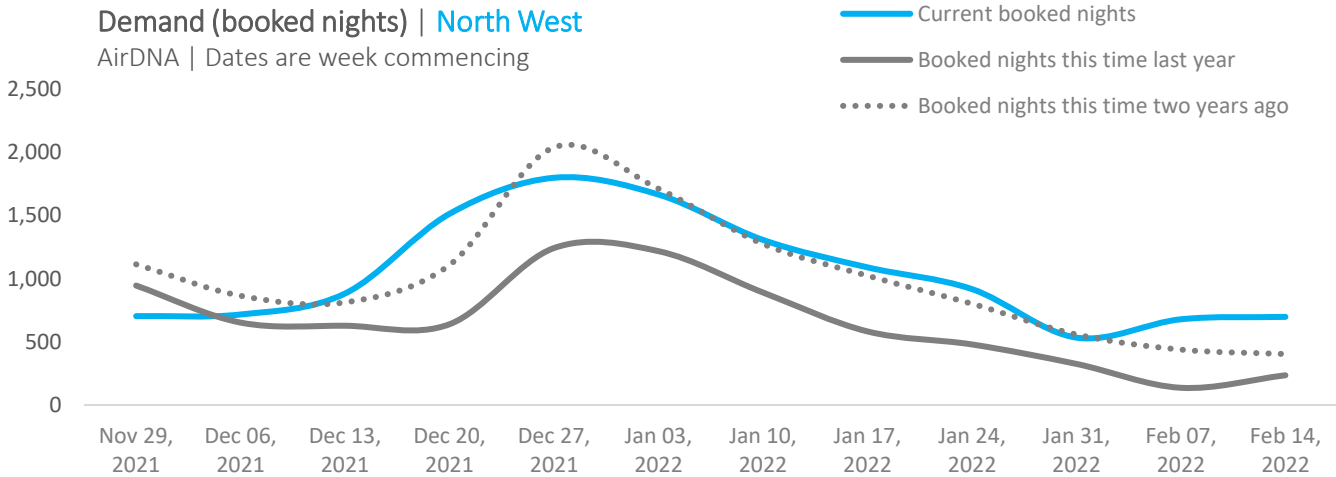
## North East Coast | Short-stay accommodation



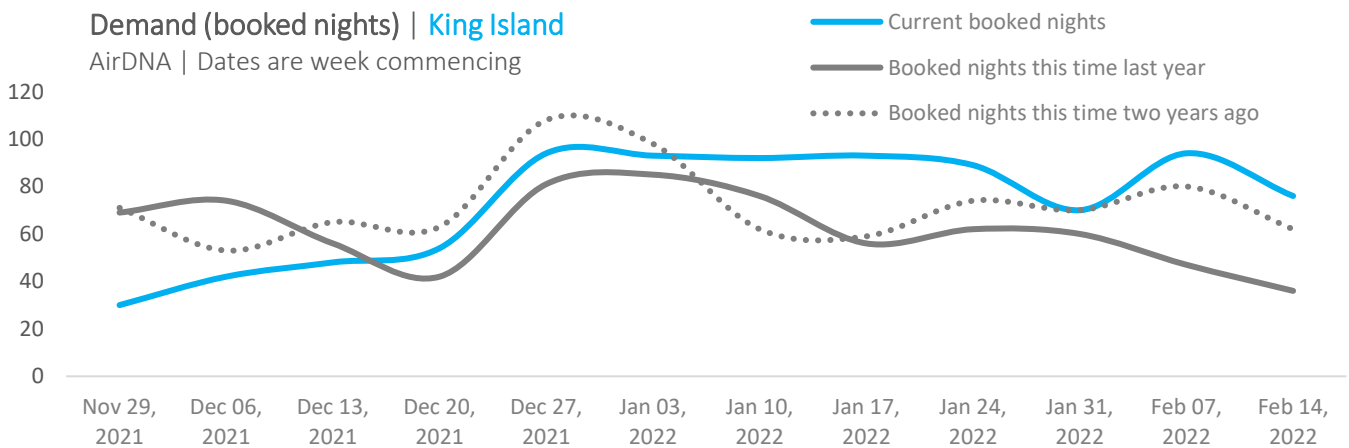
## West Coast | Short-stay accommodation



## North West | Short-stay accommodation

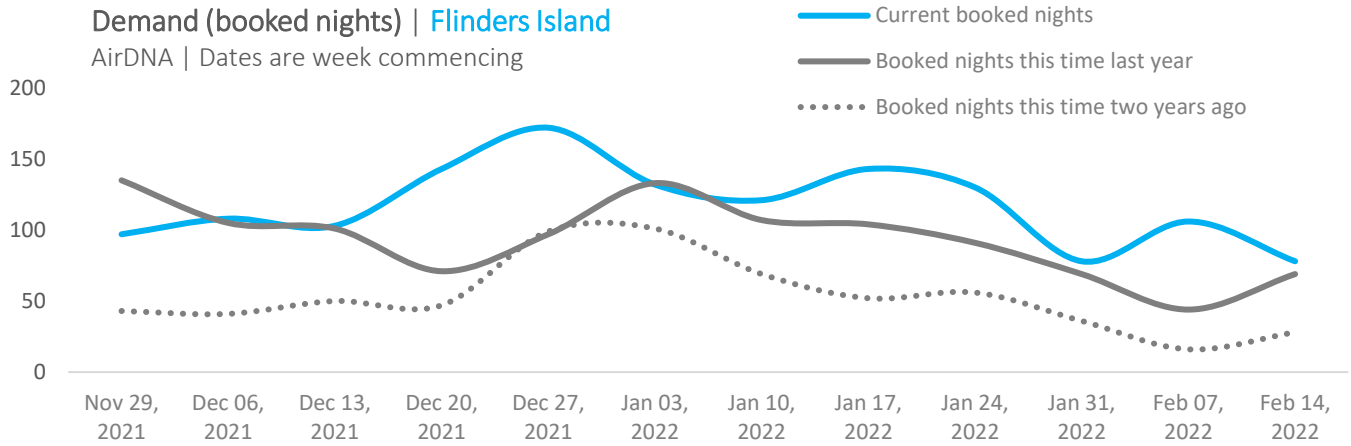


## King Island | Short-stay accommodation

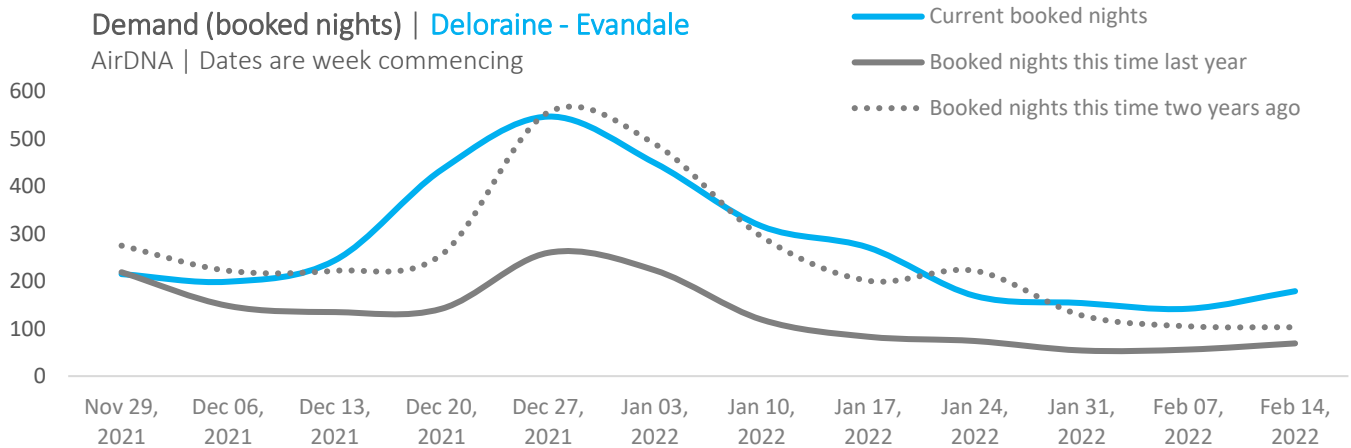




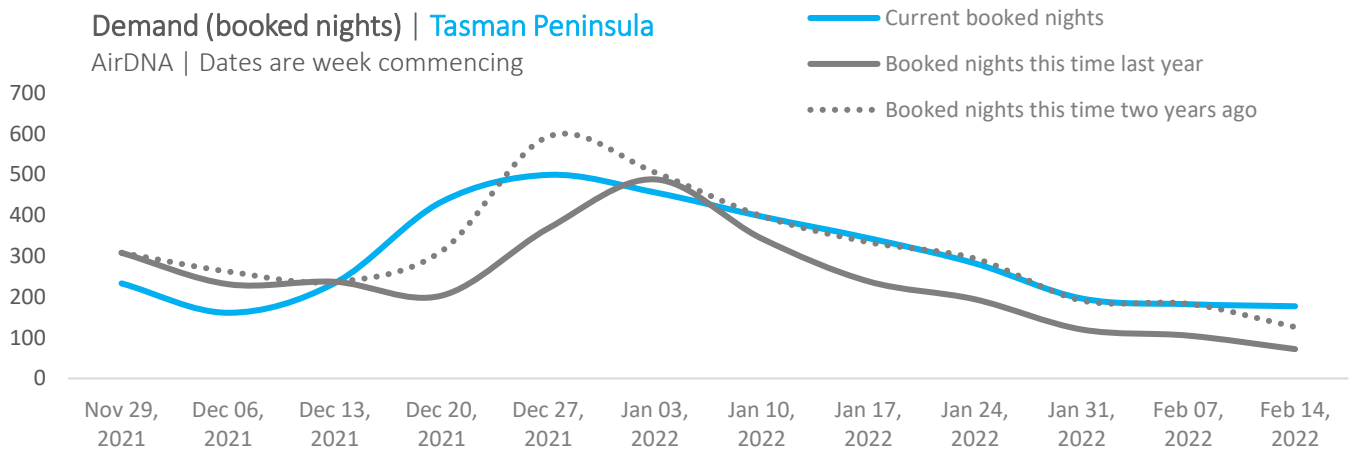
## Flinders Island | Short-stay accommodation



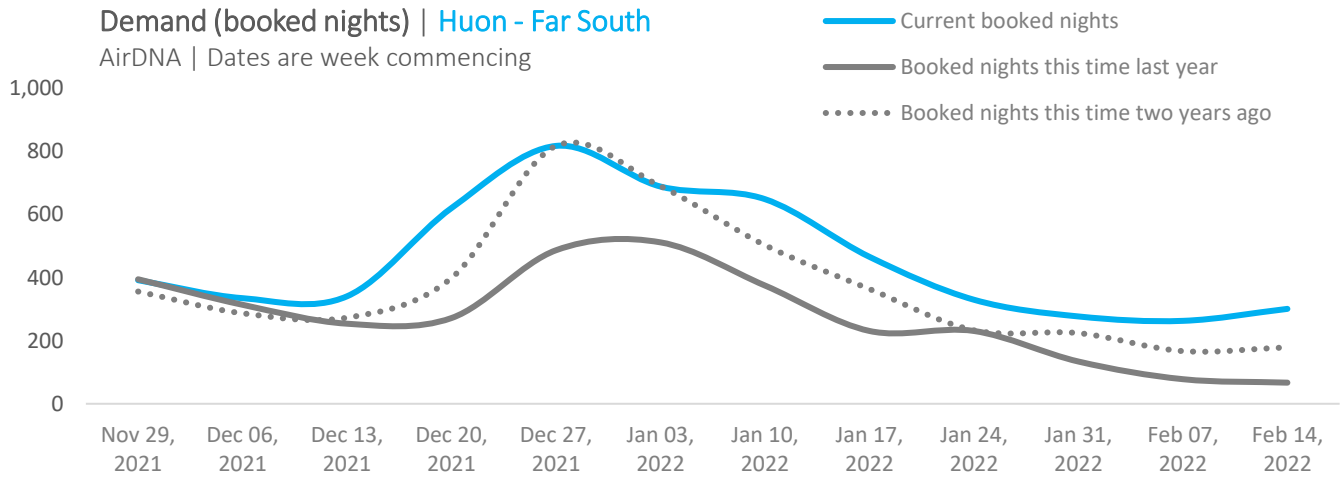
## Deloraine – Evandale | Short-stay accommodation



## Tasman Peninsula | Short-stay accommodation



## Huon – Far South | Short-stay accommodation



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

