

Industry Research and Insights Update

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

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.



Recovery Update

COVID-19 recovery tracking insights | Tourism Tasmania
June 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 shows signs of improving

Latest insights are from mid-May, therefore do not take the latest Victorian outbreak into account.

Nationally, intention to make a booking within the next month is steady, though intention to travel in the next six months has improved (most likely period is 3 months time). 90% of Australians were feeling it is safe to travel domestically, though financial concerns remain as the greatest barrier. Over half of us are thinking, researching or planning a holiday. (May 15-19 2021, TA).

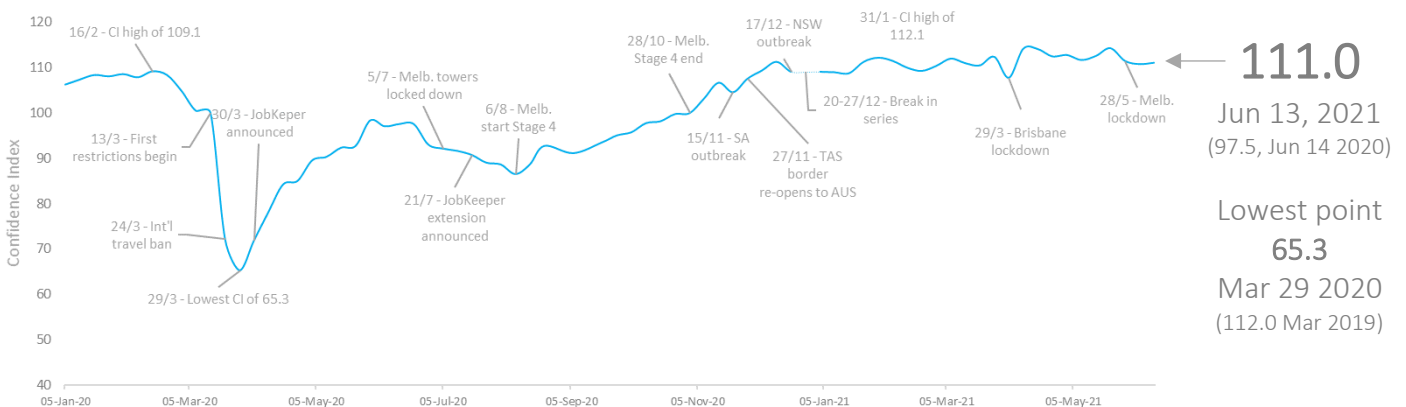
Tasmania's brand health maintained

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. Our segments are also re-engaging, with Erudites particularly more active and receptive to our campaigns. The re-launch of Come Down For Air is being received strongly across the segments and general population (TIM, Mar '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.

The Consumer Confidence index has recovered to 2019 levels, and has remained relatively steady through to June. Despite the late-March 2021 outbreak around Brisbane, and most recently Melbourne's fourth lockdown from late May, **consumer confidence has rebounded to higher levels than pre the pandemic.**



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.

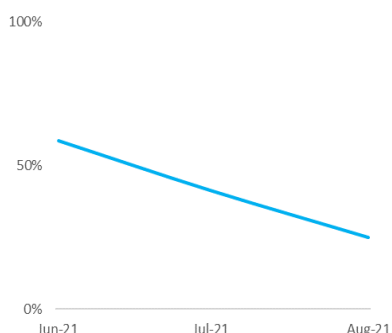
Occupancy rates continue to improve, although uncertainty of travel remains in travellers' minds. This uncertainty appears to have accelerated the pre-COVID trend of **shortened booking times**. Weekends remain clear peaks over the next few months, which may indicate caution around using up leave days for a trip that may be cancelled at the last minute by border changes. The sharp rise in occupancy in June is around the Dark Mofo winter festival, aggregated occupancy rates around 75-80%.

Help us improve this data

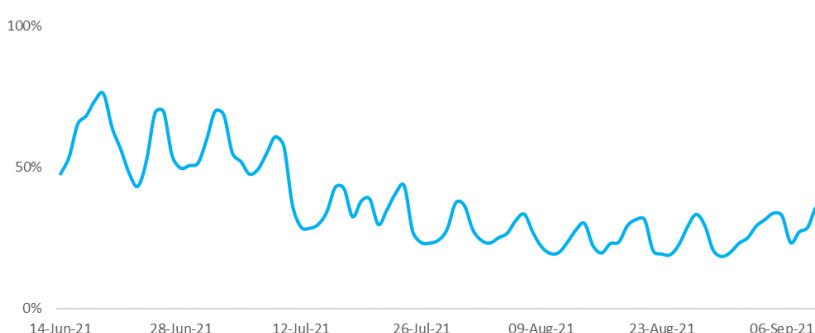
Providers of hotel, motel, lodge and similar accommodation are invited to join the free STR program to help us monitor this important sector. Please contact Tom tchappel@str.com to access your own bespoke complimentary report and contribute anonymously to industry insights and monitoring.

Hobart area occupancy on the books | at 14 June 2021

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.

The charts on the following pages provide a view forward over the coming 12 weeks, based on bookings as at the week commencing June 14, 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.

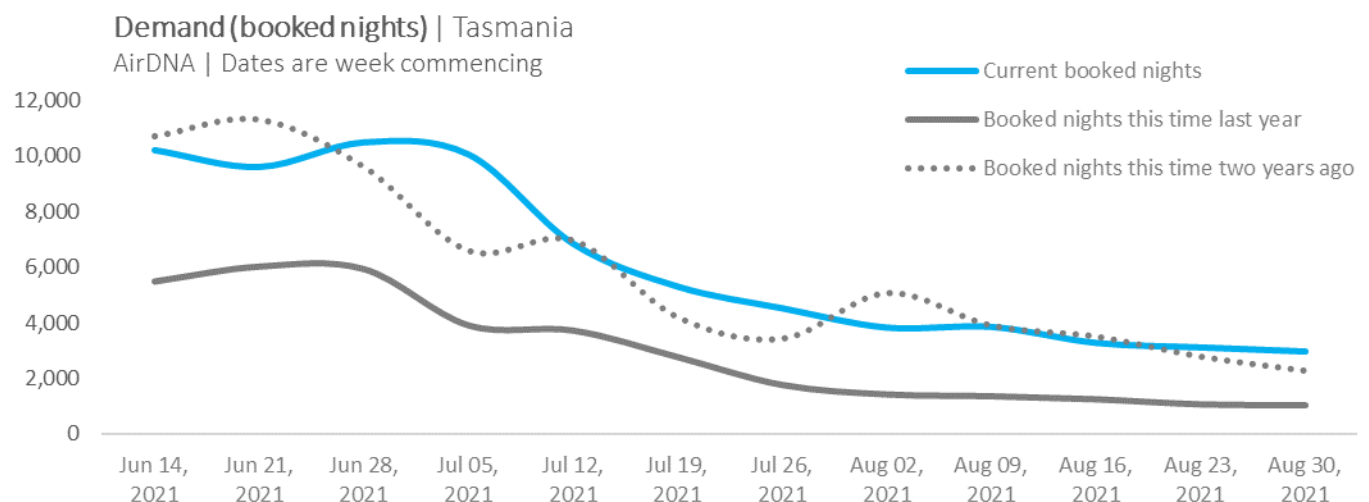
Previous reports have included an additional line for 'this time four weeks ago', however that data is unfortunately unavailable for this update.

Tasmania | Short-stay accommodation

At the state level, forward demand (booked nights) for short-stay accommodation (solid blue line) is indicating steady 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). The shortened booking window trends continues to impact forward bookings; positively over the past four weeks (dotted blue line), however does give a weaker impression looking forward until those bookings are made.

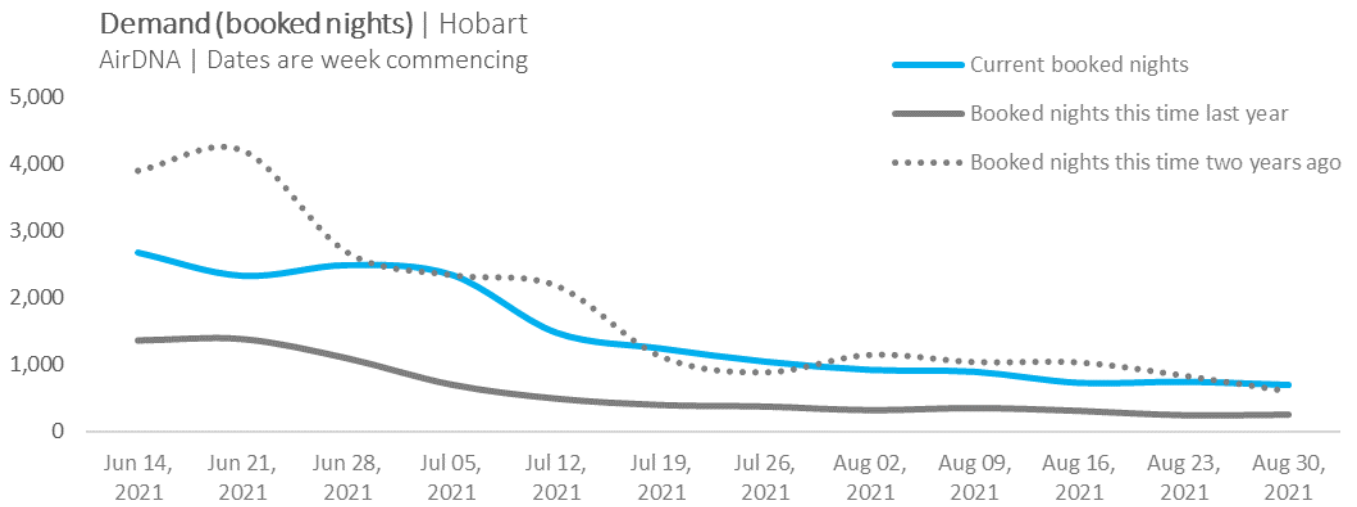
The data is showing that from June 2021, forward booked nights are on par with what they were at this time in 2019, indicating good progress towards recovery. Demand is strong through the remainder of June and into July, likely driven by major events (eg. Dark Mofo and Festival of Voices, then Huon Valley Mid-Winterfest).

At this time last year, Tasmanians had recently been informed that most intrastate travel restrictions would lift by the end of the month. Therefore from this point onwards the 'this time last year' line will begin to show how demand for travel within the state by Tasmanians positively impacted stays in short-stay accommodation, particularly in regional areas.

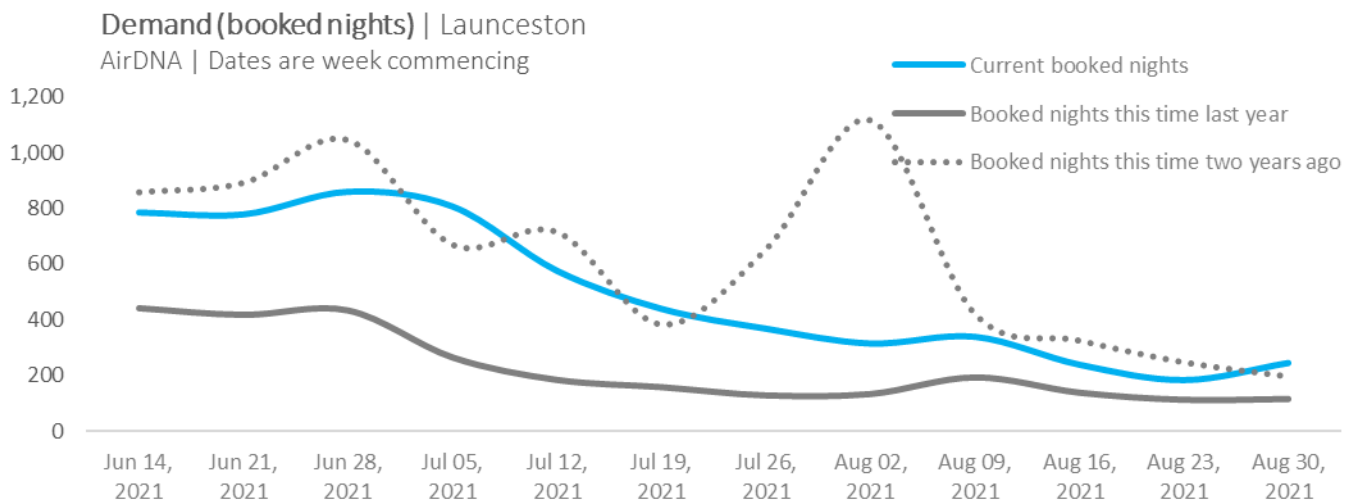


Hobart | Short-stay accommodation

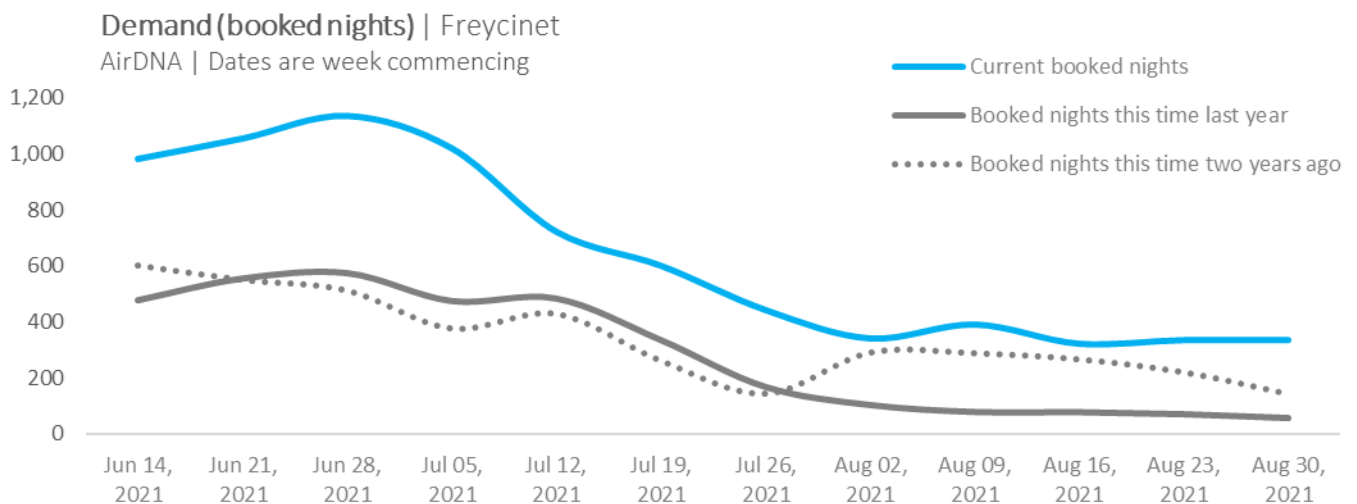
Hobart forward demand is regaining strength against this time in 2019, after lagging behind the regions in short-term accommodation demand, with the impact of Dark Mofo being held on one rather than two weekends most evident for the capital. The data is current at June 14, so Victorians affected by travel restrictions may have already cancelled trips. Data for demand as at four weeks ago is unavailable, which may have shown changes in demand.



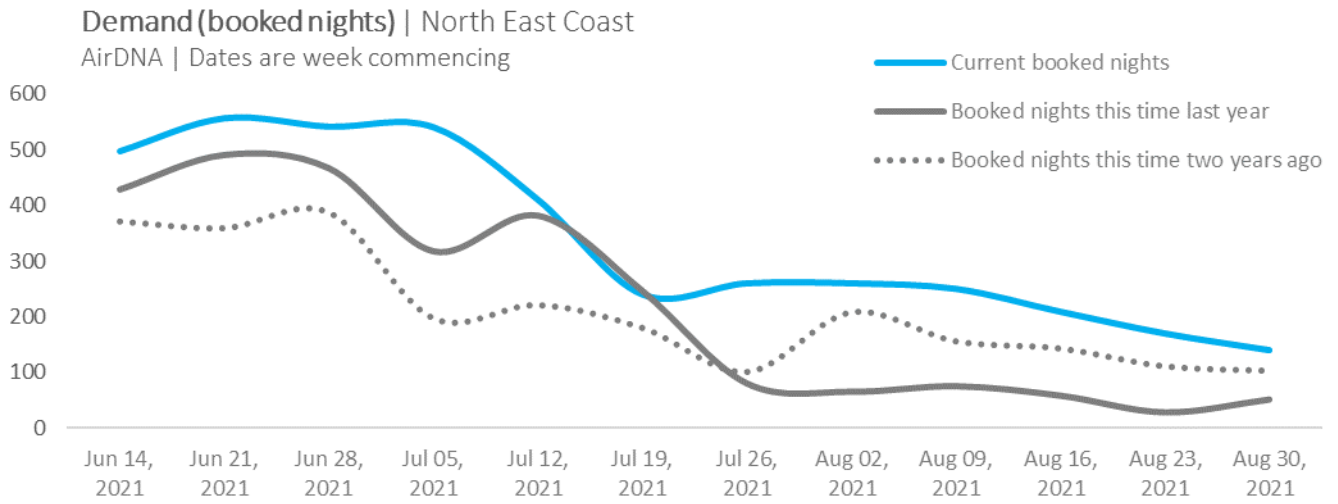
Launceston | Short-stay accommodation



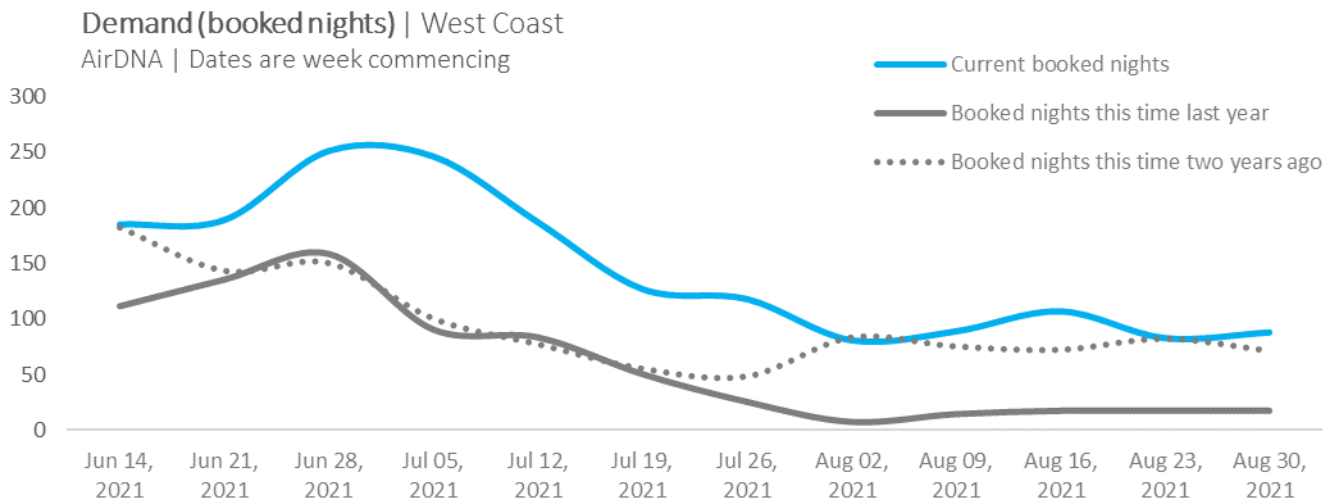
Freycinet | Short-stay accommodation



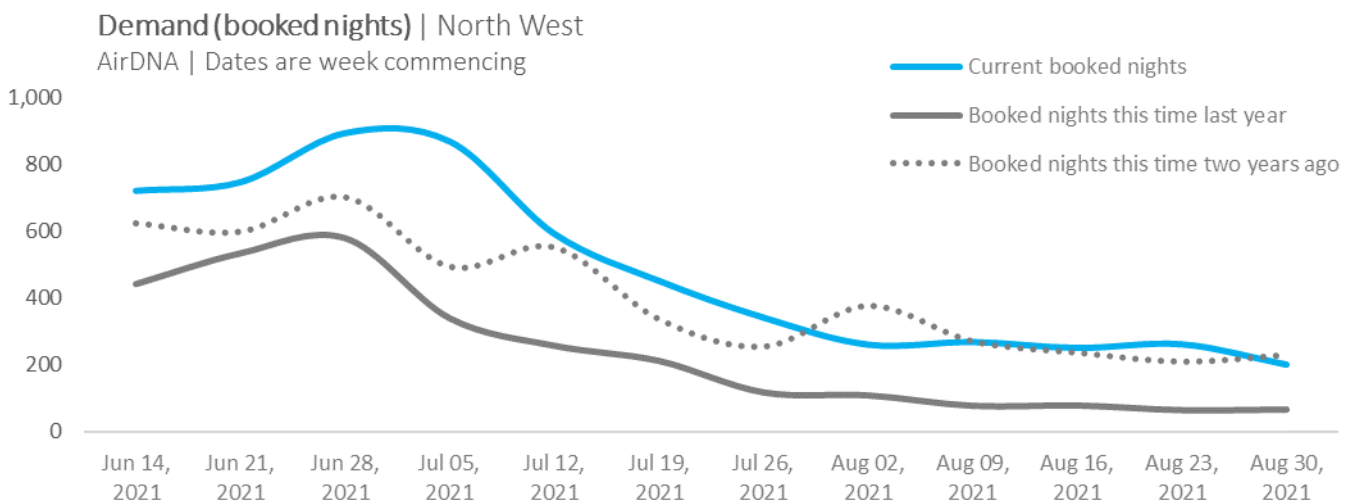
North East Coast | Short-stay accommodation



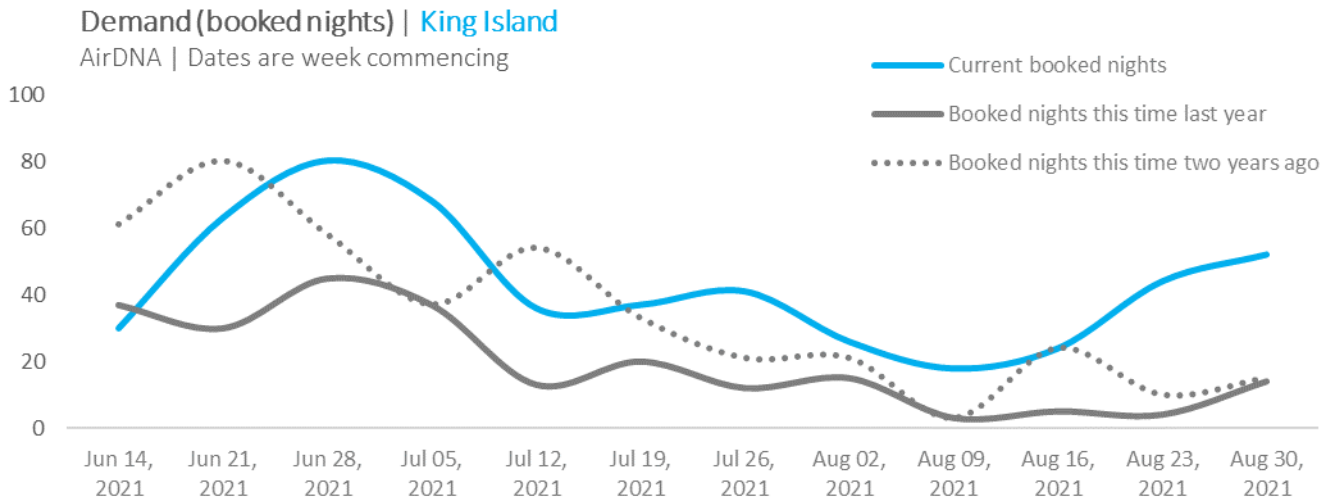
West Coast | Short-stay accommodation



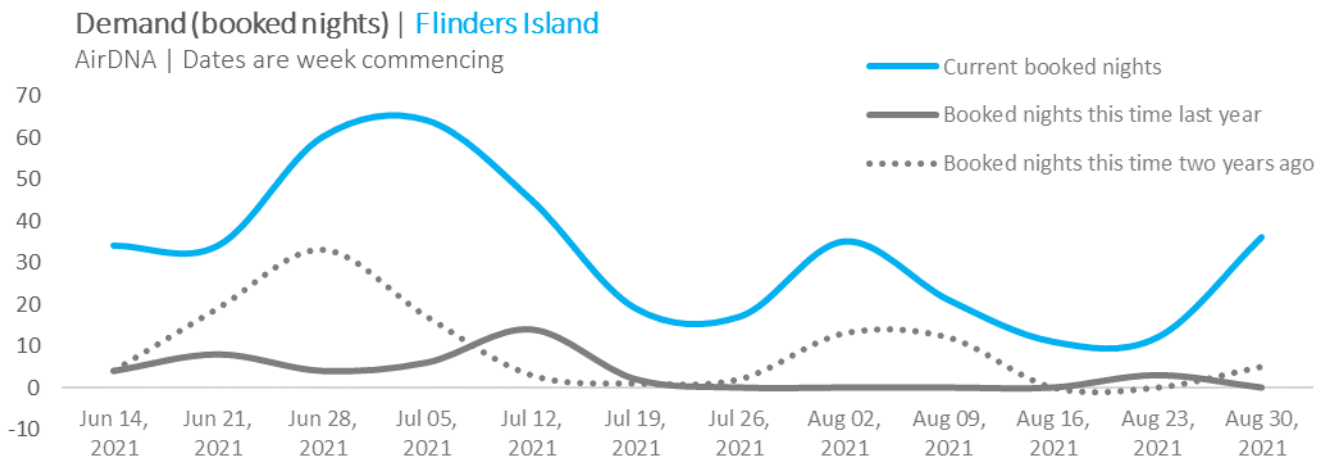
North West | Short-stay accommodation



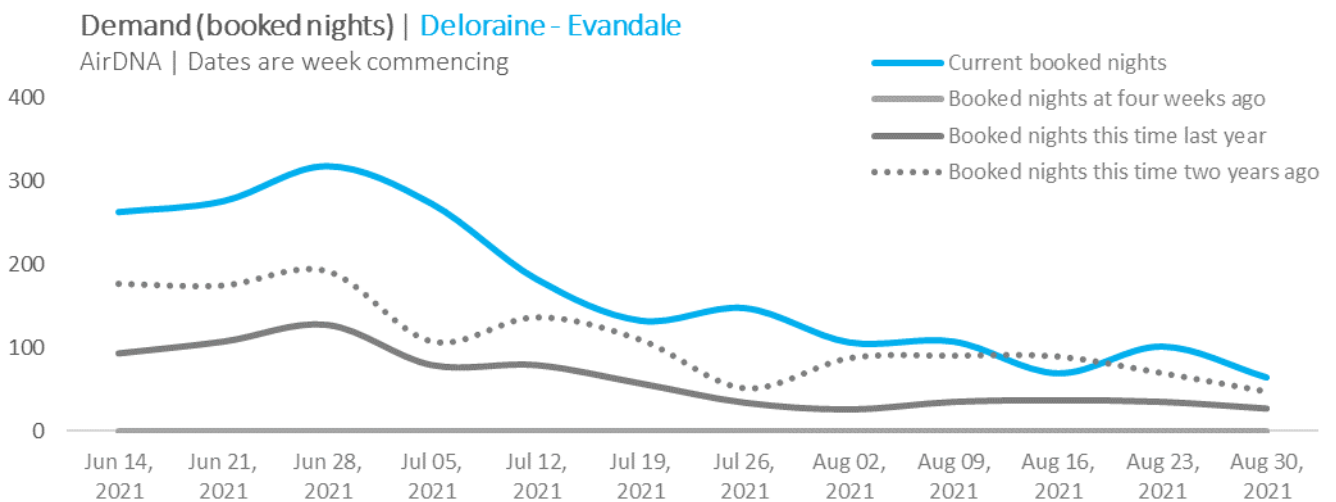
King Island | Short-stay accommodation



Flinders Island | Short-stay accommodation



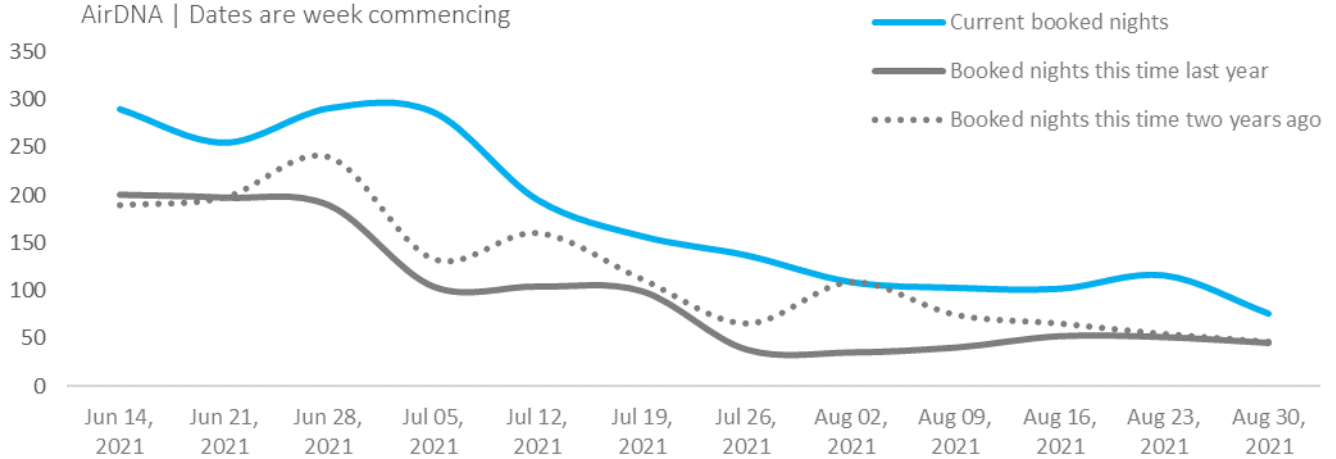
Deloraine – Evandale | Short-stay accommodation



Tasman Peninsula | Short-stay accommodation

Demand (booked nights) | Tasman Peninsula

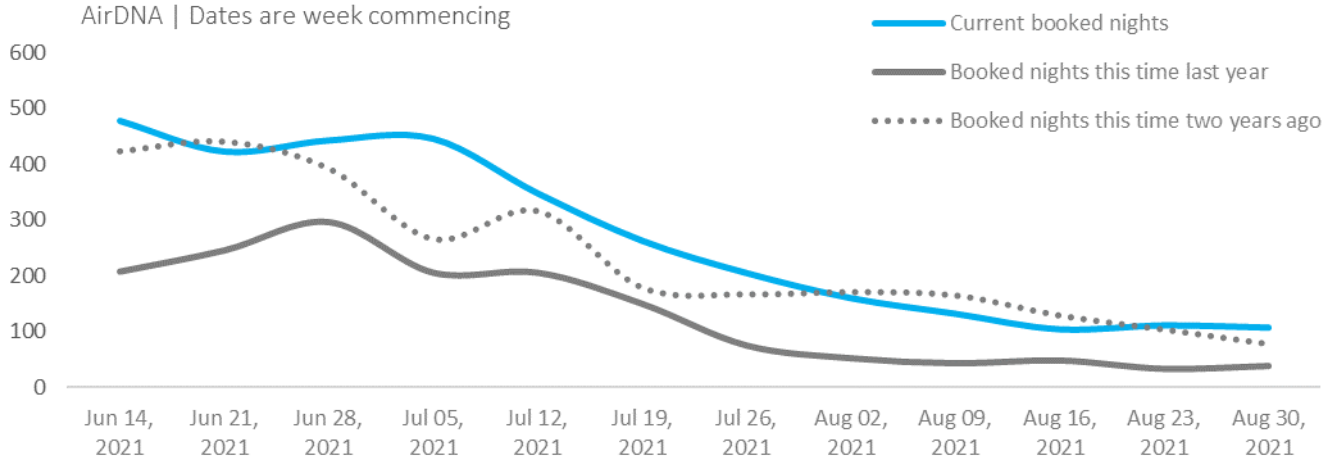
AirDNA | Dates are week commencing



Huon – Far South | Short-stay accommodation

Demand (booked nights) | Huon - Far South

AirDNA | Dates are week commencing



Eastern Shore (Hobart) | Short-stay accommodation

Demand (booked nights) | Eastern Shore (Hobart)

AirDNA | Dates are week commencing

