



SUMMARY

Statewide room nights booked in the month of November 2024 were up on last year, for the quarter and year ending November 2024. Despite a softer month for commercial occupancy rate compared to last year, overall the state occupancy rate continues to trend positively, up for the quarter and year ending.

- November 2024 saw a record number of nights booked in short-stay accommodation for a November (79.2k, +5.5% on 2023), gaining on the previous highest demand in November 2022 (77k).
- Occupancy in the commercial sector (80%) was below 2023 (82%) though on par with 2022 (80%).
- Similar to the month of November, the quarter (Sep-Nov) saw increased booked nights across both sectors compared to last year, though with generally softer occupancy rates.

REGIONAL INSIGHTS

SOUTHERN

The South saw an overall slight lift in room nights booked in November 2024, led by a strong uplift in short-stay accommodation while the commercial sector was on par with 2023. The quarter and year ending October 2024 also recorded positive results with increases in booked nights from the same periods last year.

NORTHERN

The North saw a lift in total room nights booked from last year for the quarter and year ending November 2024. The month of November 2024 however had fewer booked nights across both sectors compared to 2023, on trend with the region also recording fewer interstate and international visitors in the period.

EAST COAST

The East experienced an overall lift in room nights booked as increased demand for both sectors in the month flowed through to the quarter and year ending November 2024 compared to the same periods last year.

NORTH WEST

Overall room nights booked across the North West improved from last year for the month, quarter and year ending November 2024, led by increases in short-stay demand while commercial occupancy was on par with the same month and quarter last year.

WEST COAST

Booked nights in the month and year ending November 2024 were on par with the same periods in 2023, though saw a softening for the November quarter due to high demand in October 2023 boosted by the Unconformity festival. No data is available for this region for commercial occupancy rates.

WHERE THE DATA COMES FROM

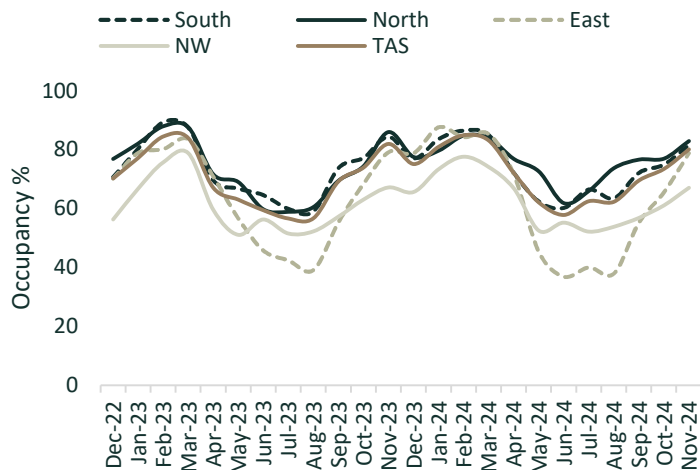
Commercial accommodation is compiled by global research company STR drawing on data provided by operators across multiple accommodation types including hotels, motels, lodges and holiday parks, and primarily properties with more than 10 rooms. Regional data is only provided for a region when the mix of providers is representative across operator size, rating, brand affiliation and rates. The West Coast does not have sufficient operator participation for occupancy reporting.

Short-stay accommodation is compiled by AirDNA from Airbnb and VRBO platforms covering holiday homes, shacks, pods and self-contained apartments, as well as some traditional bed and breakfasts. Tourism Tasmania reporting includes only 'entire places', where a guest has access to their own kitchen, bathroom and bedrooms. Demand (booked nights) is the preferred indicator for the short-stay sector, as it removes any fluctuations from properties going on and off availability, such as properties only listed over peak periods.

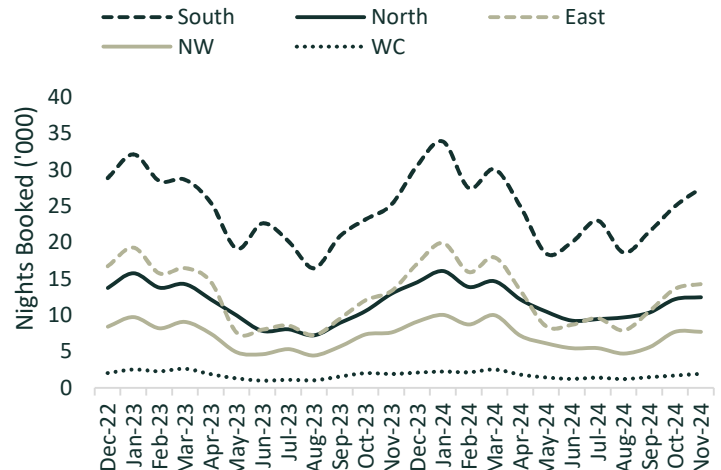
Notes on interpreting accommodation data

Both are effectively samples of the sectors, with neither reaching 100% coverage of all accommodation options, such as paid sites for camping or caravans, and does not include nights spent in other options (eg. staying with family or a friend's shack). There can be duplication of listings across commercial and short-stay datasets. While the datasets provide an indication of demand for the main accommodation options, this is only one aspect of visitation to a region. Tourism Tasmania regularly publishes a range of visitor data at www.TourismTasmania.com.au/research/visitors

COMMERCIAL OCCUPANCY RATE



SHORT-STAY DEMAND (BOOKED NIGHTS) ('000)





COMMERCIAL OCCUPANCY RATE

November	Month		
	2023	2024	% chg
TASMANIA	82%	80%	▼ -2.3%
Southern	84%	81%	▼ -3.2%
Northern	86%	83%	▼ -3.6%
East Coast	76%	79%	▲ 3.8%
North West	67.1%	66.9%	▼ -0.2%
West Coast	no data		

Quarter		
2023	2024	% chg
75%	74%	▶ -0.9%
78%	76%	▼ -2.9%
77%	79%	▲ 2.9%
68%	66%	▼ -1.7%
62.4%	61.6%	▼ -1.3%
no data		

Year Ending		
2023	2024	% chg
70%	72%	▲ 2.4%
73%	74%	▶ 0.3%
74%	76%	▲ 3.3%
64%	64%	▶ -0.4%
61%	63%	▲ 2.8%
no data		

SHORT-STAY BOOKED NIGHTS ('000)

November	Month		
	2023	2024	% chg
TASMANIA	75.1	79.2	▲ 5.5%
Southern	25.2	27.5	▲ 9.0%
Northern	13.0	12.5	▼ -3.7%
East Coast	13.3	14.3	▲ 7.2%
North West	7.6	7.7	▲ 1.0%
West Coast	1.90	1.94	▲ 1.7%

Quarter		
2023	2024	% chg
201	216	▲ 8%
69	74	▲ 7%
32	35	▲ 8%
35	38	▲ 10%
20.6	21.0	▲ 2%
5.5	5.1	▼ -7%

Year Ending		
2023	2024	% chg
837	885	▲ 6%
291	301	▲ 3%
135	145	▲ 7%
149	157	▲ 6%
83	88	▲ 6%
21.2	21.1	▶ -0.3%

CURRENT MONTH IN PREVIOUS YEARS

COMMERCIAL OCCUPANCY RATE

November	2019	2020	2021	2022	2023	2024
TASMANIA	85	46	58	80	82	80
Southern	93	45	64	83	84	81
Northern	83	42	52	86	86	77
East Coast	61	61	50	70	76	65
North West	75	60	48	63	67	61
West Coast	no data					

SHORT-STAY BOOKED NIGHTS ('000)

2019	2020	2021	2022	2023	2024
68	37	44	77	75	79
26.1	11.2	14.4	26.4	25.2	27.5
11.6	6.1	7.5	13.1	13.0	12.5
9.4	7.9	7.4	14.7	13.3	14.3
5.9	4.5	4.8	7.7	7.6	7.7
1.3	1.0	1.2	2.0	1.9	1.9

CHANGE KEY

- ▲ More than 1%
- ▼ Below -1%
- ▶ Stable when change is between -1% & +1%

KEY TERMS

Room nights booked is the number of nights a room was booked in a period. A 'room' is a single bookable option, regardless if that is a two bedroom hotel room or four bedroom short-stay property.

Occupancy rate is the room nights available divided by room nights booked, expressed as a percentage.

HELP US IMPROVE THE COMMERCIAL DATA?

Commercial accommodation operators can help improve this dataset by contributing to the STR program.

STR provides accommodation operators an opt-in system to add their data to an anonymous aggregate report, drawing on a broad capture of platforms and booking systems, across a wide range of accommodation types.

Please contact Jacqueline (jchoo@str.com) to contribute anonymously to industry insights and monitoring, and access your own bespoke report.