

# Industry Research and Insights Update

COVID-19 tourism industry recovery insights | Tourism Tasmania  
June 2022

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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.



# Recovery Update

COVID-19 recovery tracking insights | Tourism Tasmania  
June 2022

## 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 data and insights.

### Domestic Travel sentiment

*Latest national domestic travel insights are from mid-May 2022.*

The majority of Australians are actively considering or researching their next holiday, however over one-third are not thinking about their next holiday. Intention of domestic travel and booking were both down slightly compared to April, with fewer intending to travel domestically in the short term and growing uncertainty about travel plans. Financial concerns remain the biggest barrier to domestic travel, overtaking concerns of COVID-19, alongside cost of living pressures (TA, 15-19 May 2022).

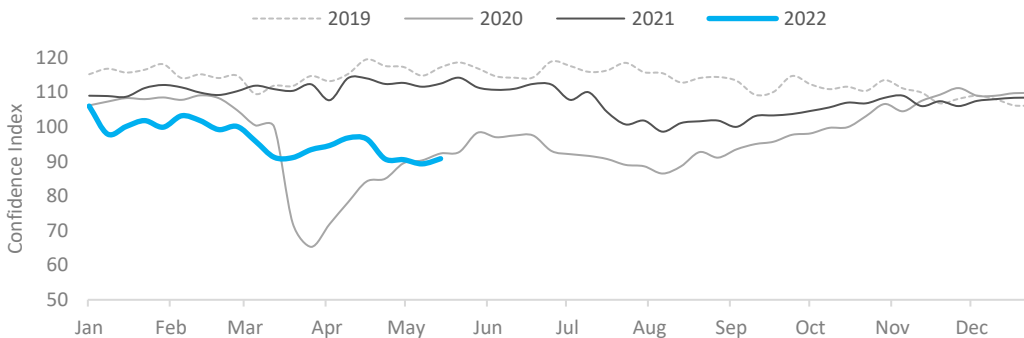
### Tasmania's brand health maintained

Tasmania continues to maintain its brand position, including perceptions of Tasmania as 'meaningful' and 'different'. Key domestic markets being impacted by lockdowns in late 2021 affected the consumer journey, with planning and consideration of travel to Tasmania remaining stable. Those actively dreaming of a trip to Tasmania increased, in anticipation of experiencing unrestricted travel. Despite a slight decline in those 'active' in the planning stages, Tasmania remains comparable to competitor destinations (TIM, Dec '21).

### Consumer Confidence Index

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

Consumer Confidence remains low since Victoria's second wave of COVID-19 in August 2020 and is a significant 22pts below the same week a year ago, May 29-30, 2021 (112.7). The latest CC index is from the end of May 2022, and has remained steady through the month, following a drop in April. The national CC level is now 5.6pts below the 2022 weekly average of 96.3. The drop was compounded by the rising cost of living, including elevated petrol prices and flow-on impacts on consumer goods.



**90.8**  
May 30, 2022  
(2021: 112.5)  
(2020: 92.3)  
(2019: 117.2)

# 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

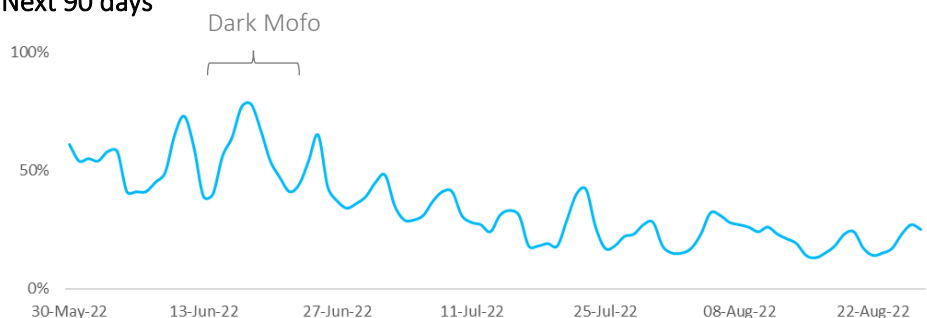
The long-term view of forward bookings continues to reflect a dynamic period for bookings and consumer uncertainty, with this indicated in narrow booking windows. In Hobart, strong bookings in mid-June coincide with Dark Mofo, particularly weekends, and have experienced pick-up in bookings over the past month. Demand peaks in Launceston in mid-June, around the Australian Musical Theatre Festival, AFL game and Launceston Running Festival.

### Hobart area occupancy on the books | at 30 May 2022

#### Next 3 months

	This year	Last year	%pt change
June	52%	49%	+3
July	29%	32%	-3
August	21%	21%	0

#### Next 90 days

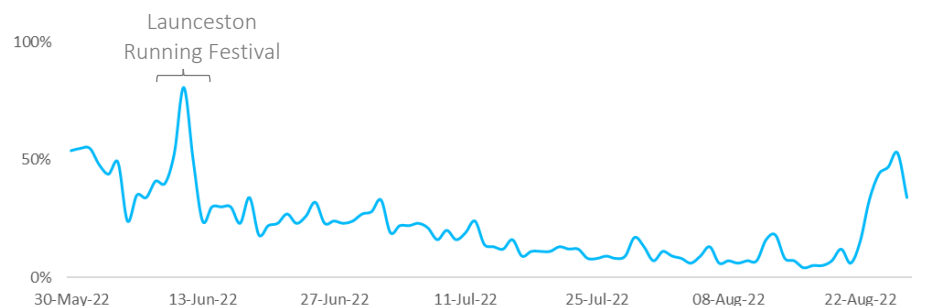


### Launceston area occupancy on the books | at 30 May 2022

#### Next 3 months

	This year	Last year	%pt change
June	34%	27%	+7
July	15%	13%	+2
August	15%	8%	+7

#### Next 90 days



Source: 2022 STR, Inc. / STR Global, Ltd. trading as STR.

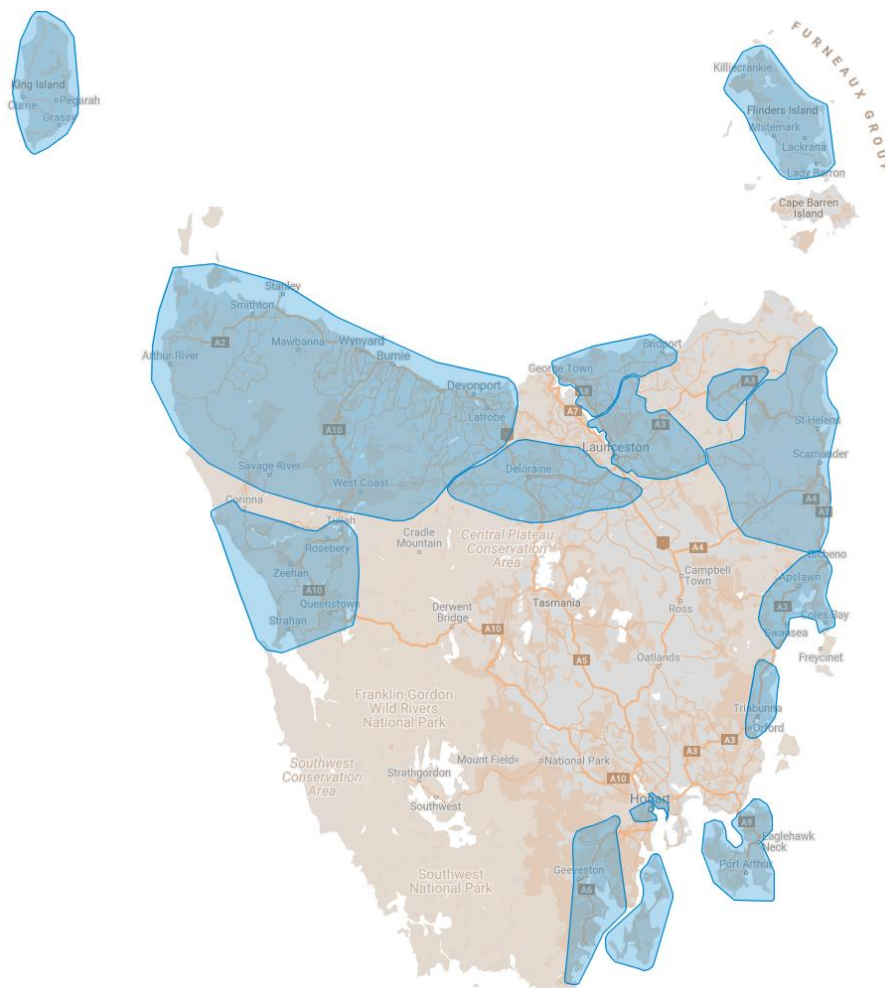
### Help us improve this data

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.

## 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 trend of lower demand for city-based short-stay accommodation.

## AirDNA | Demand (booked nights) in the next 3 months | 30 May 2022 to 15 August 2022

	2022	2021	% change	2019	% change	% share of state demand for this period in:		
						2022	2021	2019
Tasmania	76,193	55,072	38%	60,907	25%			
Hobart	18,607	11,982	55%	20,798	-11%	24.4%	21.8%	34.1%
Launceston	6,082	4,602	32%	6,079	0%	8.0%	8.4%	10.0%
King Island	624	427	46%	389	60%	0.8%	0.8%	0.6%
Flinders Island	448	436	3%	104	331%	0.6%	0.8%	0.2%
East Tamar-Bridport	1,482	1,076	38%	798	86%	1.9%	2.0%	1.3%
Deloraine-Evandale	2,069	1,442	43%	1,040	99%	2.7%	2.6%	1.7%
Derby	827	834	-1%	533	55%	1.1%	1.5%	0.9%
Orford	927	712	30%	754	23%	1.2%	1.3%	1.2%
Tasman Peninsula	1,812	1,857	-2%	1,214	49%	2.4%	3.4%	2.0%
Bruny Island	3,537	2,836	25%	1,833	93%	4.6%	5.1%	3.0%
Huon-Far South	3,268	2,465	33%	2,391	37%	4.3%	4.5%	3.9%
Eastern Shore (Hobart)	2,746	1,772	55%	2,581	6%	3.6%	3.2%	4.2%
Freycinet	6,422	4,306	49%	3,562	80%	8.4%	7.8%	5.8%
NE Coast	3,805	3,288	16%	1,912	99%	5.0%	6.0%	3.1%
West Coast	1,816	1,065	71%	946	92%	2.4%	1.9%	1.6%
North West	6,607	4,682	41%	3,940	68%	8.7%	8.5%	6.5%

The charts on the following pages provide a view forward over the coming 12 weeks, based on bookings as at the week commencing May 30, 2022. 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:

- + **Demand** in 2022 | Solid blue line. Booked nights in the system as of the start date.
- + **Demand** four weeks ago | Dotted blue line. Refers to demand that was in place four weeks ago.
- + **Demand** in 2021 | Solid grey line. This refers to the same month in 2021.
- + **Demand** in 2019 | Dotted grey line. This refers to the same month in 2019.

## Tasmania | Short-stay accommodation

At the state level, demand into the winter period remains elevated, and then follows the 2021 trend into August. State-wide demand over the next three months is 25% higher than this time in 2019. For the next 3 months, all of the tracked regions experienced pick-ups in bookings compared to the same time 4 weeks ago, which is a positive outlook for both regional and city accommodation.

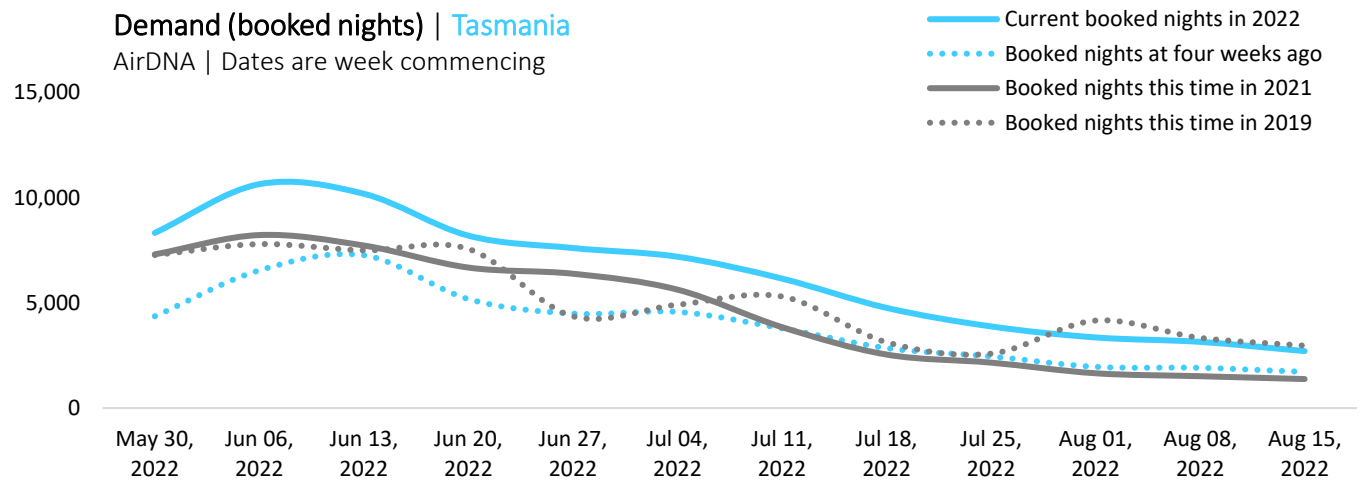
Looking forward, overall demand (booked nights) for short-stay accommodation (solid blue line) is indicating improvements from previous years. The dotted blue line (booked nights at four weeks ago) indicates that there is a sustained pick-up of bookings, with reduced booking windows remaining in play. The level of demand in place for June and July is now ahead of the demand recorded in both months of 2019, meaning a particularly strong recovery for this period in this sector into these cooler months.

At this time in 2021, Tasmanians were able to enjoy unrestricted intrastate travel, and interstate travel had resumed from most interstate destinations, with some travel restrictions beginning to be reinstated.

## TASMANIA | Short-stay accommodation

### Demand (booked nights) | Tasmania

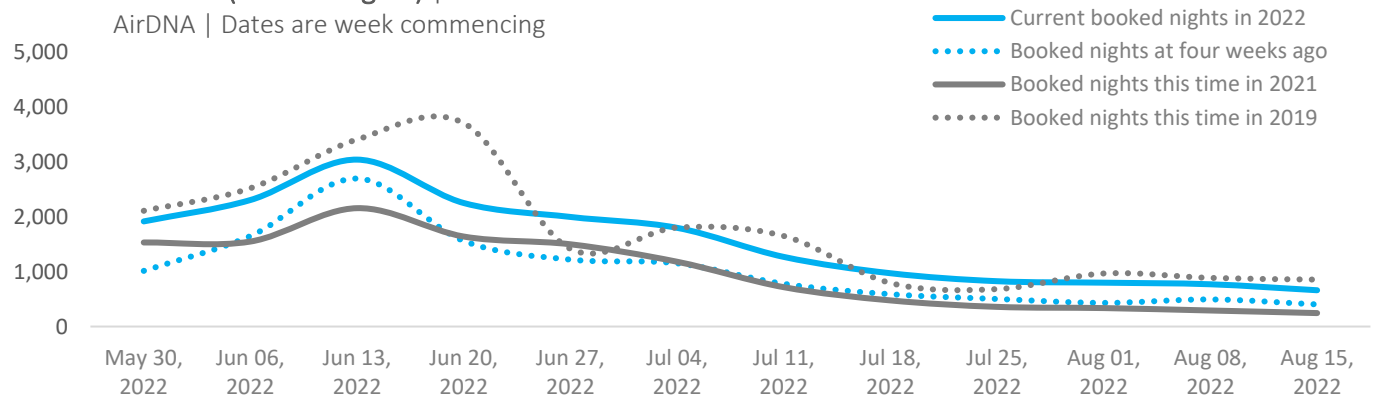
AirDNA | Dates are week commencing



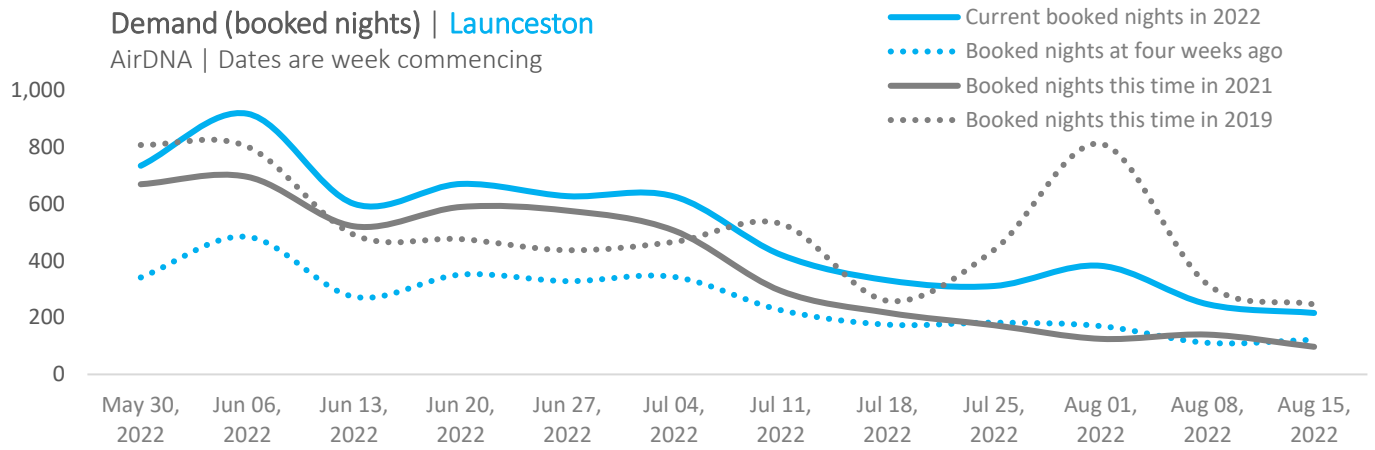
## Hobart | Short-stay accommodation

### Demand (booked nights) | Hobart

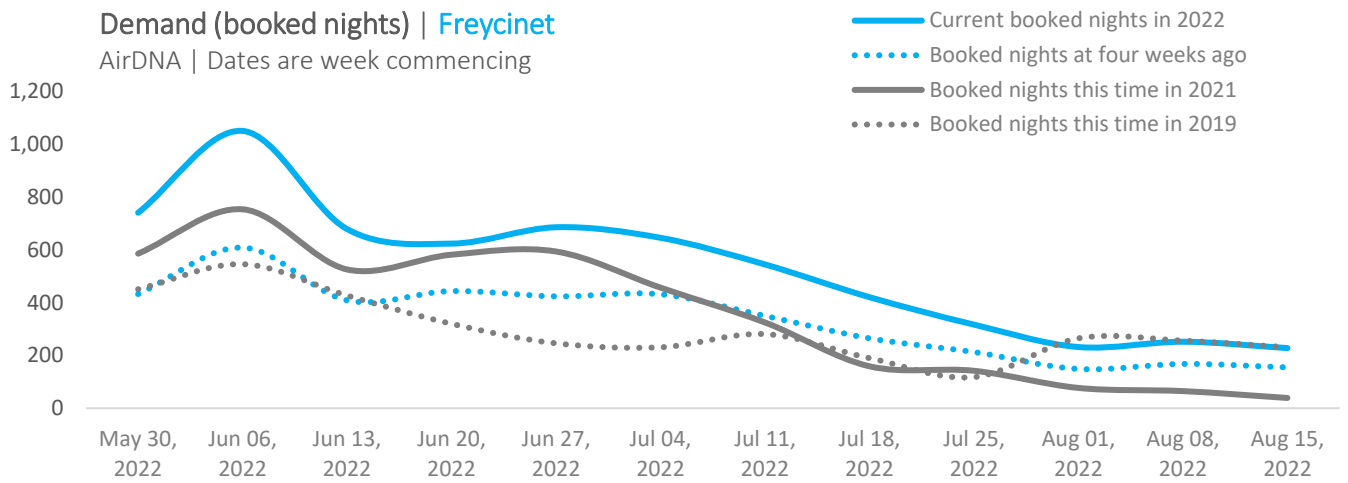
AirDNA | Dates are week commencing



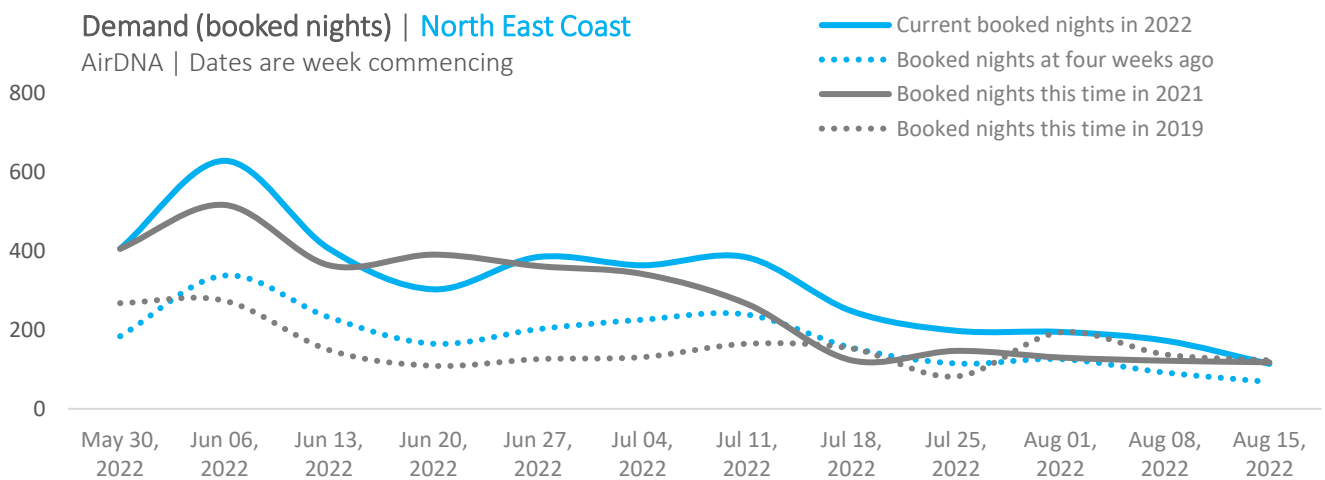
## Launceston | Short-stay accommodation



## Freycinet | Short-stay accommodation



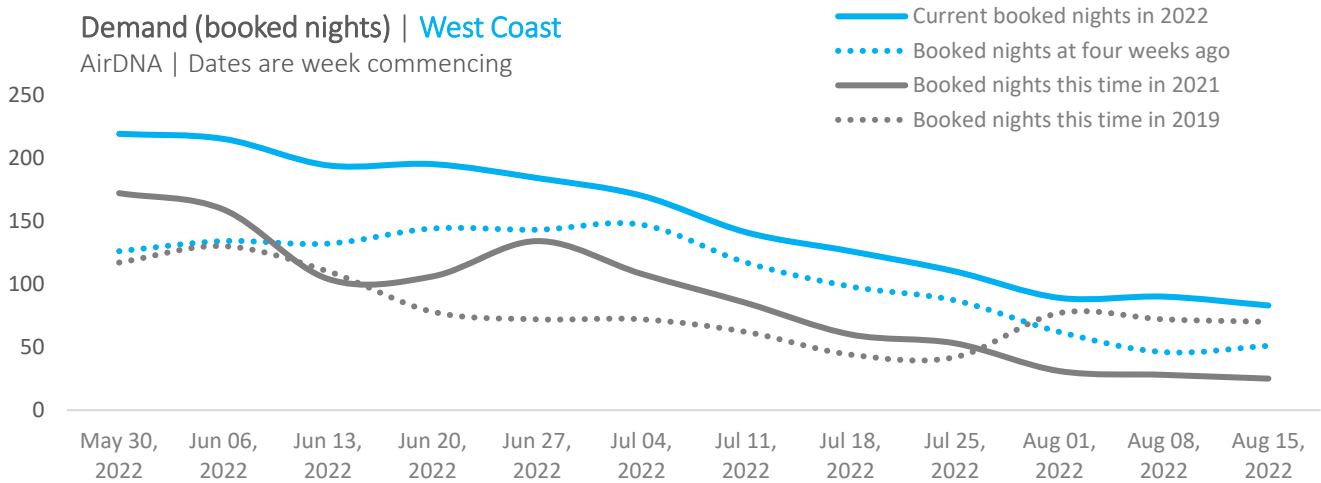
## North East Coast | Short-stay accommodation



## West Coast | Short-stay accommodation

### Demand (booked nights) | West Coast

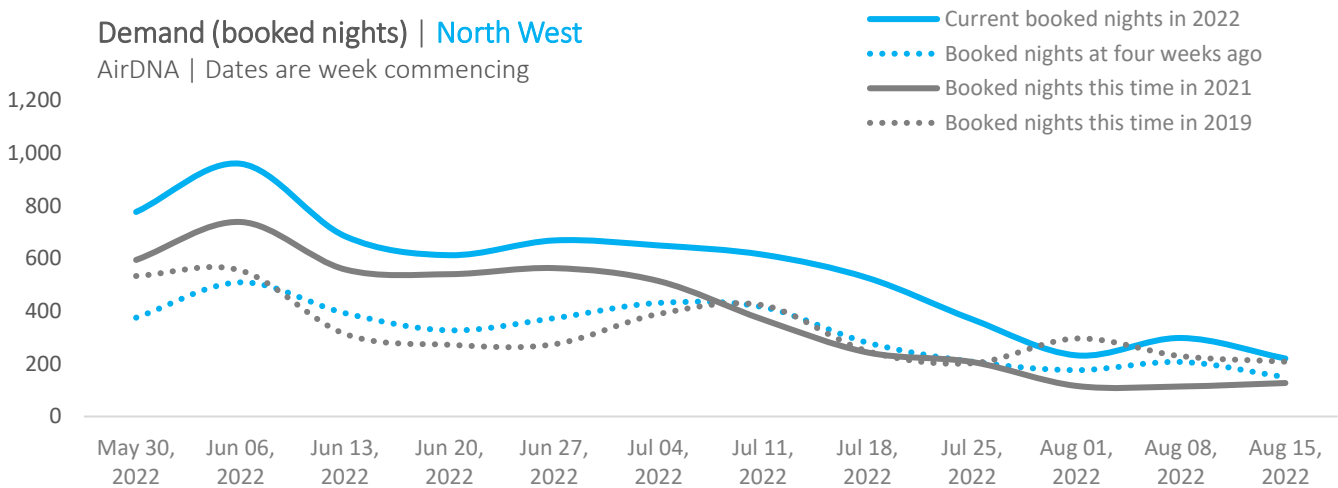
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## North West | Short-stay accommodation

### Demand (booked nights) | North West

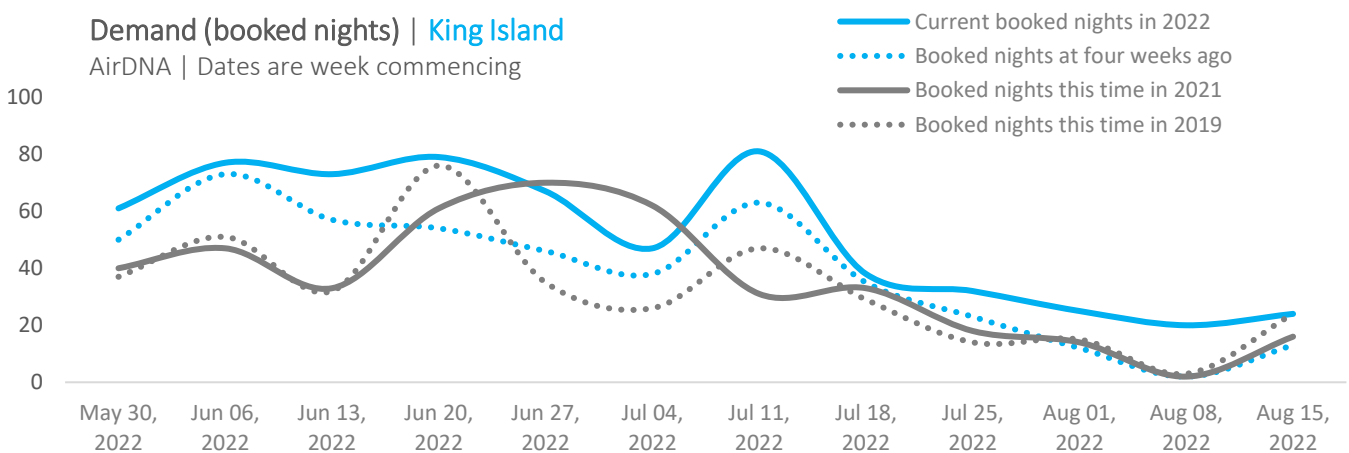
AirDNA | Dates are week commencing



## King Island | Short-stay accommodation

### Demand (booked nights) | King Island

AirDNA | Dates are week commencing

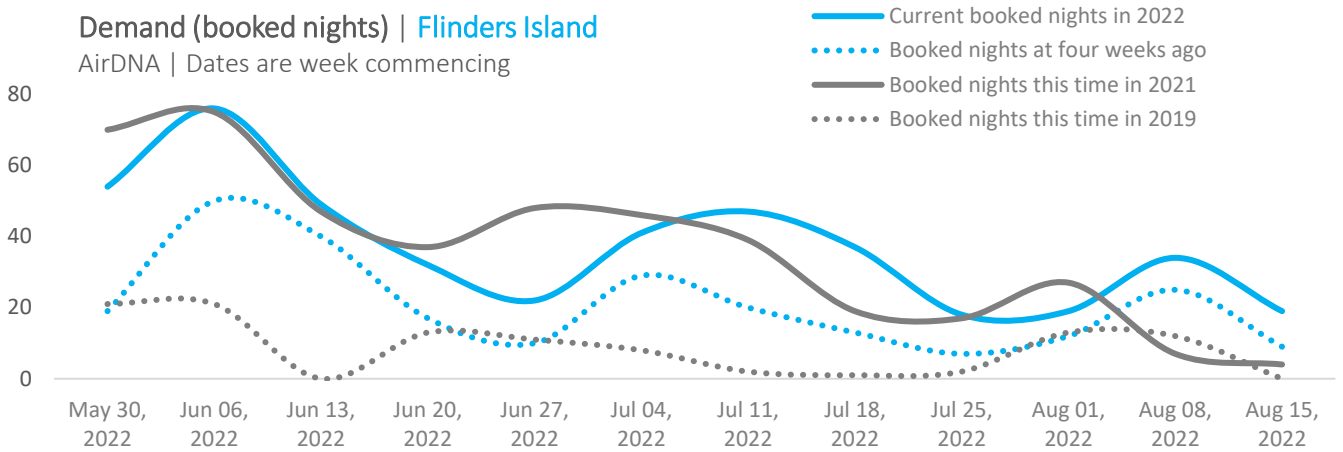




## Flinders Island | Short-stay accommodation

### Demand (booked nights) | Flinders Island

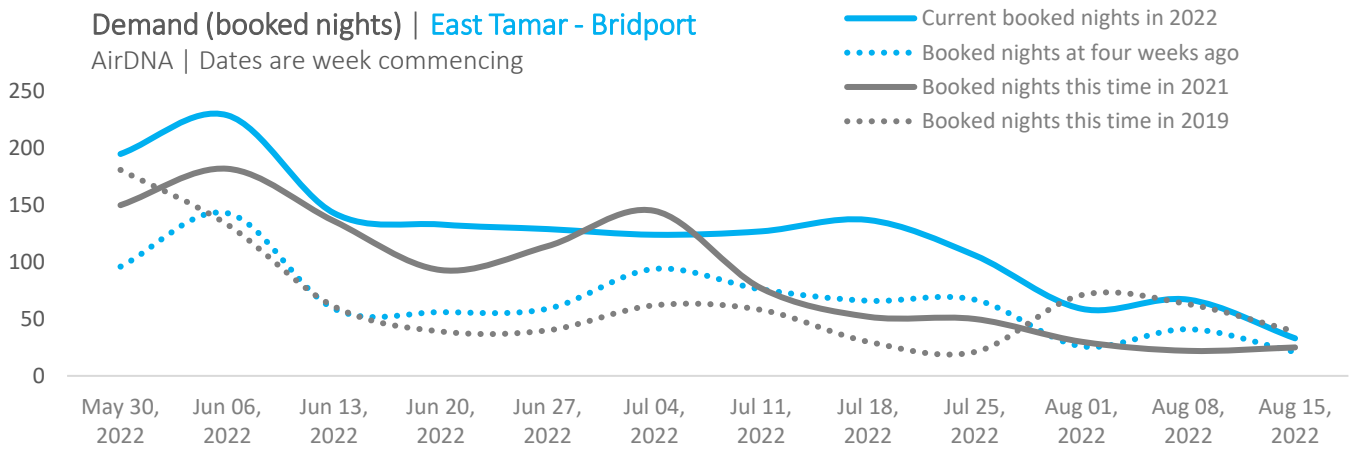
AirDNA | Dates are week commencing



## East Tamar - Bridport | Short-stay accommodation

### Demand (booked nights) | East Tamar - Bridport

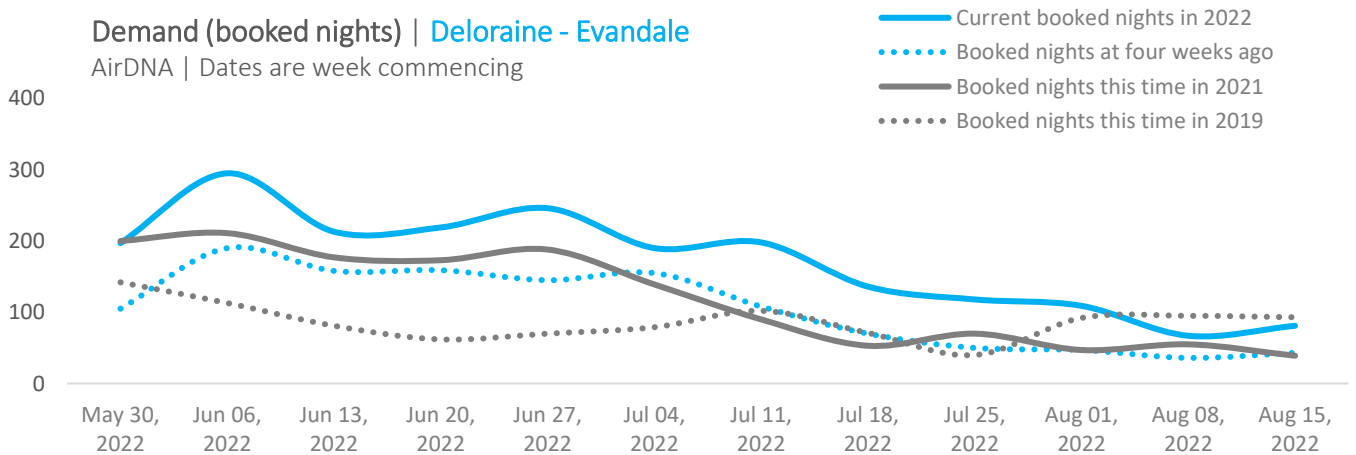
AirDNA | Dates are week commencing



## Deloraine – Evandale | Short-stay accommodation

### Demand (booked nights) | Deloraine - Evandale

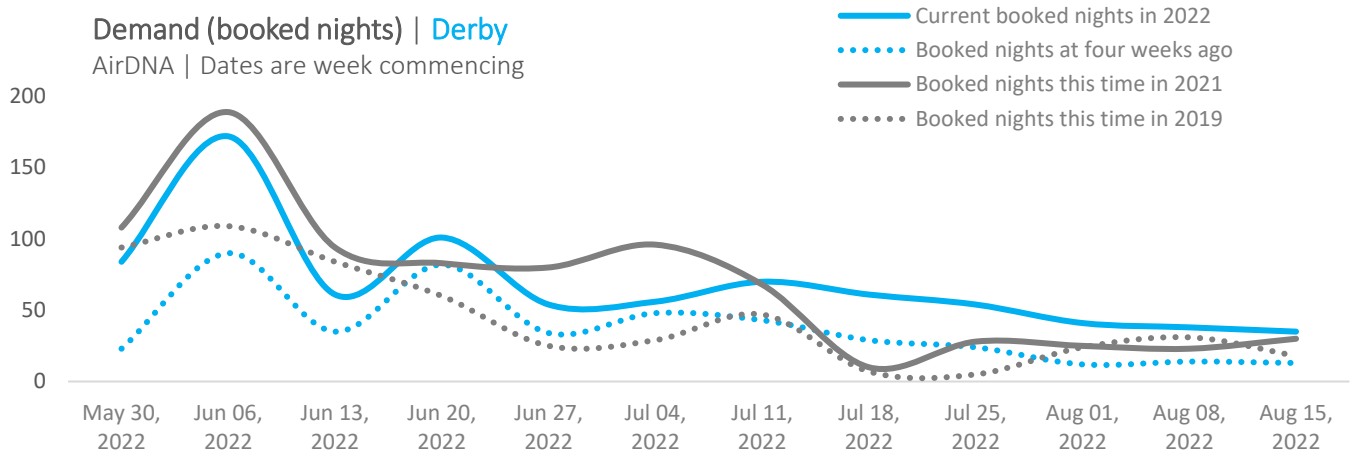
AirDNA | Dates are week commencing



## Derby | Short-stay accommodation

### Demand (booked nights) | Derby

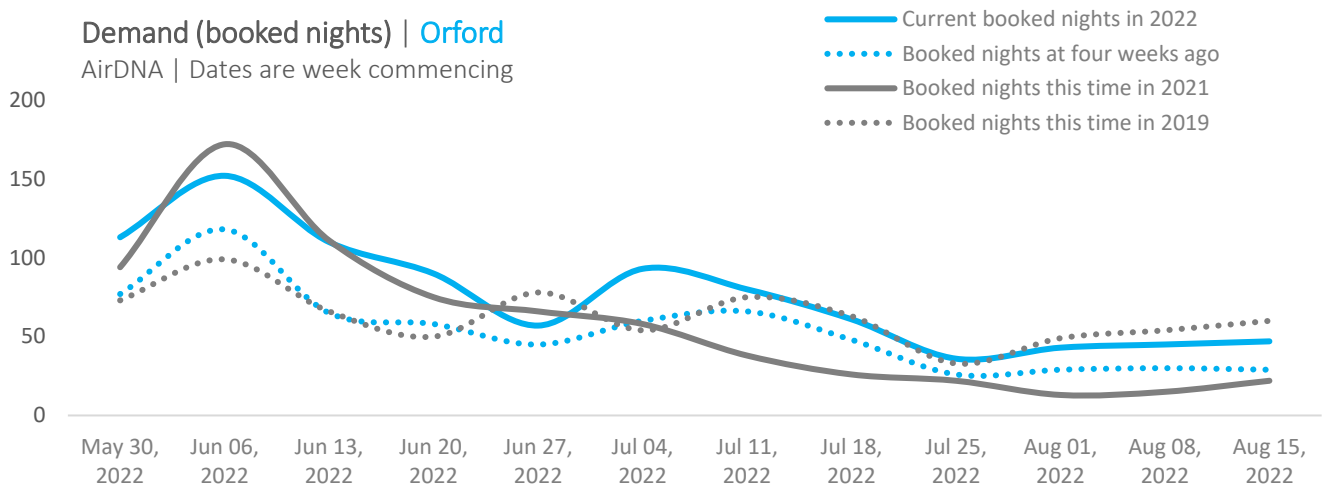
AirDNA | Dates are week commencing



## Orford | Short-stay accommodation

### Demand (booked nights) | Orford

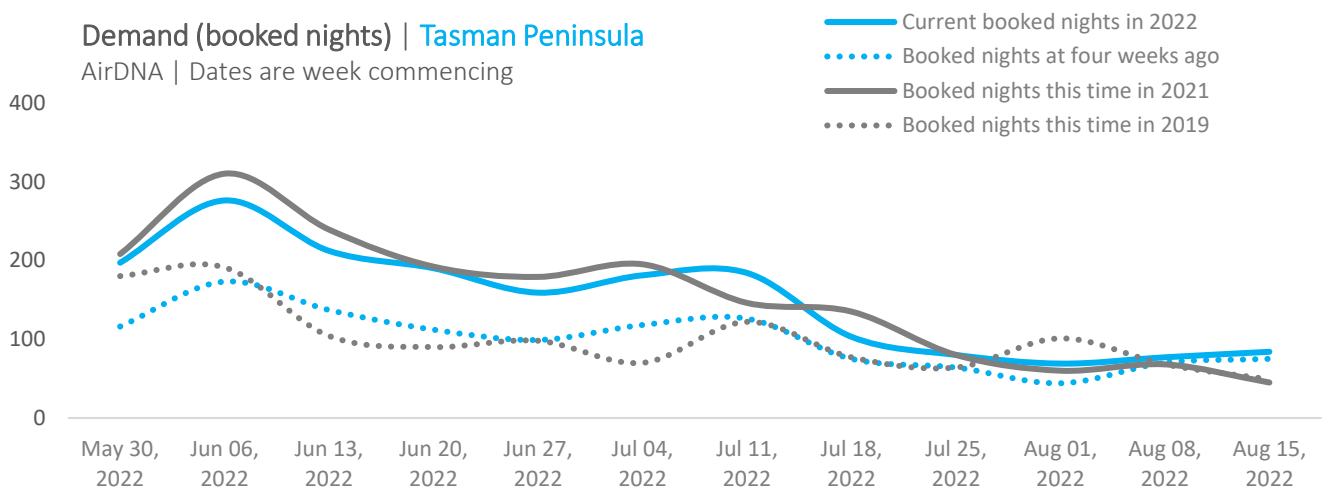
AirDNA | Dates are week commencing



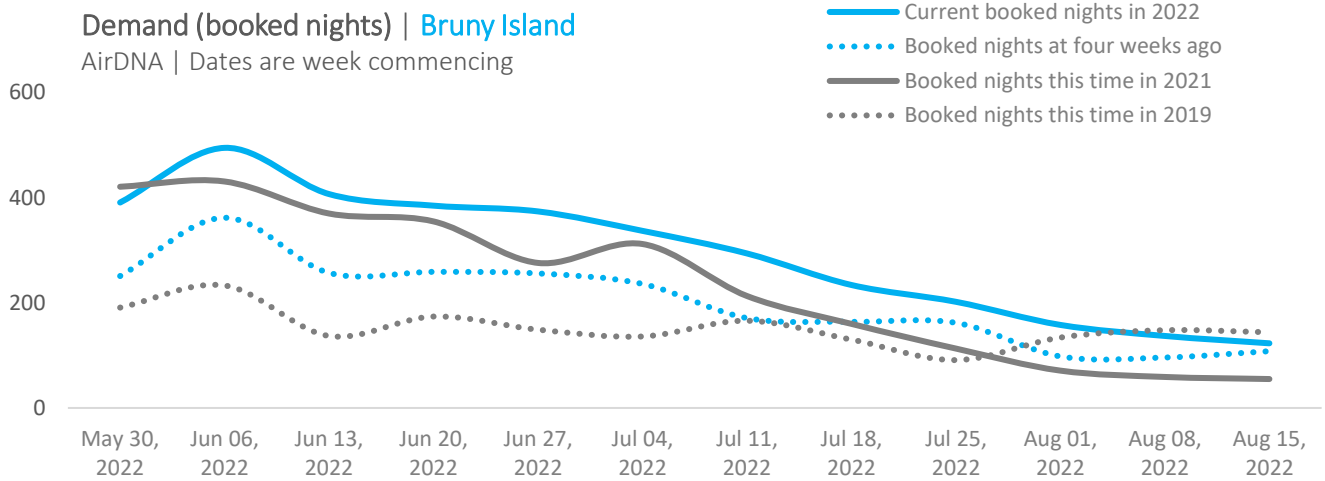
## Tasman Peninsula | Short-stay accommodation

### Demand (booked nights) | Tasman Peninsula

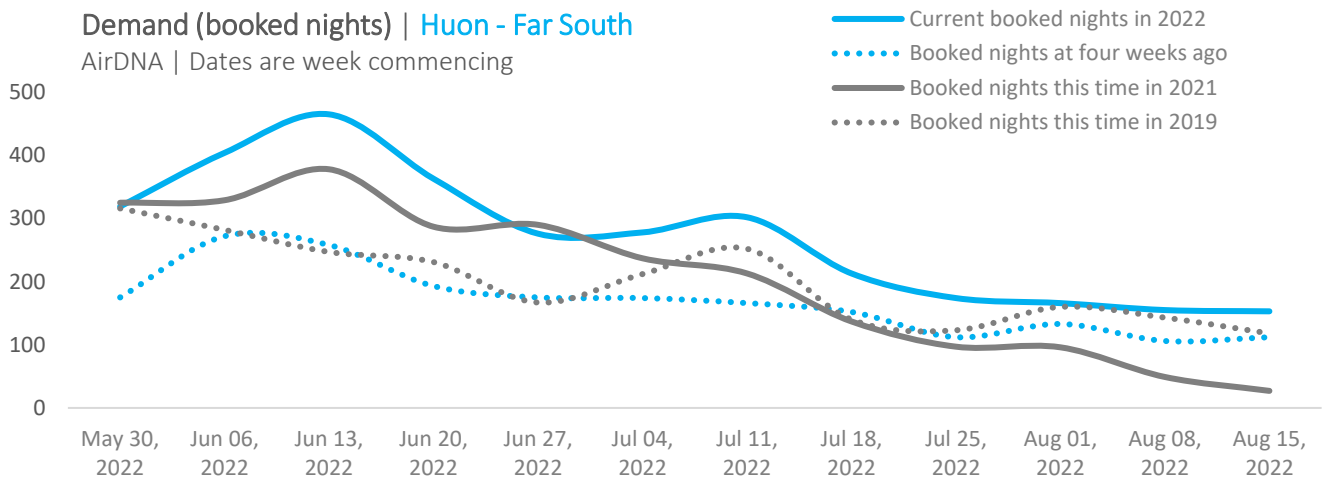
AirDNA | Dates are week commencing



## Bruny Island | Short-stay accommodation



## Huon – Far South | Short-stay accommodation



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

