

# Industry Research and Insights Update

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

## Industry update

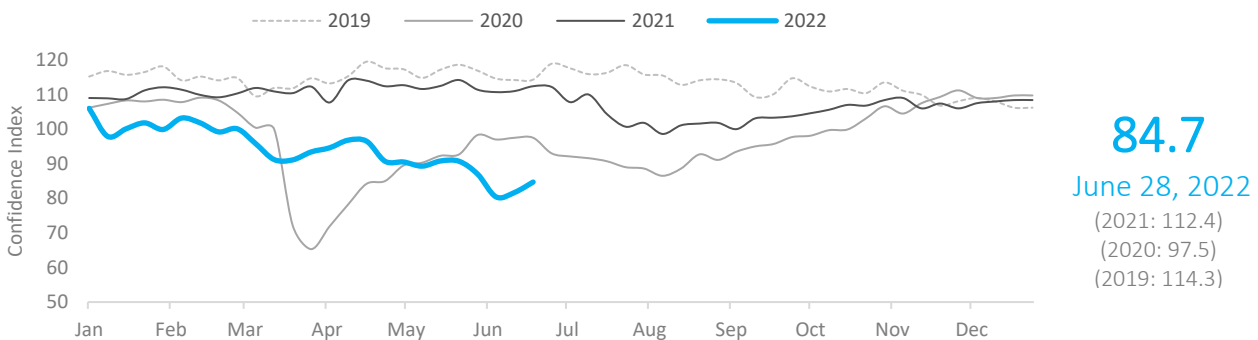
Tourism Tasmania is actively tracking the recovery of the tourism and hospitality industry, with regular updates through T21 visitor economy strategy and the [industry recovery portal](#). This report focuses on industry recovery by providing a view forward through consumer and industry data and insights.

### 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 following a drop in early June, largely in response to the RBA increase of interest rates by 0.5%, representing the largest increase in over 20 years. Consumer confidence is now a significant 27.5pts below the same week a year ago, June 26/27, 2021 (112.2). The latest CC index is from the end of June 2022, and has remained low for the month, following a drop in early June April. The national CC level is now 9.5pts below the 2022 weekly average of 94.2.

The CC drop was compounded by the rising cost of living, including elevated petrol prices and flow-on impacts on consumer goods. Following a sharp decline in early June Australians' agreement that 'now is a good time to buy a major household item' – which are predominantly discretionary spend items, similar to travel decisions – has improved over the past fortnight but remains exceptionally weak and is likely impacting short-term travel plans.



### Tasmania's brand health maintained

Tasmania continues to maintain its brand position, including perceptions of Tasmania as 'meaningful' and 'different'. As restrictions eased, Tasmania has been able to regain saliency, that is, top-of-mind recall of the brand, when compared to other domestic travel destinations. The domestic market continues to steadily recover with many returning to active stages of the travel consumer journey. For Tasmania, the recovery of Erudites to the active stages of the consumer journey has been faster than compared to Raw Urbanites, however in the latter part of Q1 '22 they are also growing in the active stages (TIM, Mar '22).

# 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

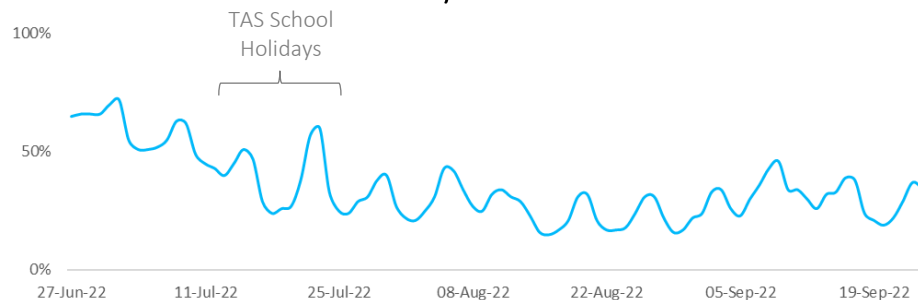
The long-term view of forward bookings continues to reflect a dynamic period for bookings and consumer uncertainty, with this indicated in narrow booking windows. In Hobart, strong bookings in mid-July coincide with the Tasmanian school holiday period, and have experienced pick-up in bookings over the past month. Demand peaks in Launceston in late August around an AFL game and leading into September with the Junction Arts Festival.

### Hobart area occupancy on the books | at 26 June 2022

#### Next 3 months

	This year	Last year	%pt change
July	44%	44%	0
August	25%	28%	-3
September	31%	36%	-5

#### Next 90 days

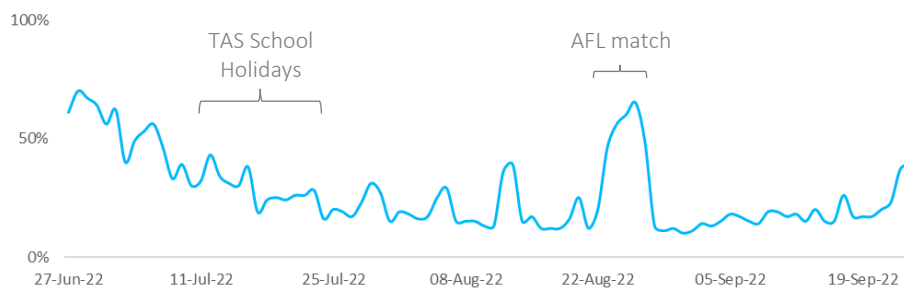


### Launceston area occupancy on the books | at 26 June 2022

#### Next 3 months

	This year	Last year	%pt change
July	33%	18%	+15
August	24%	9%	+15
September	19%	16%	+3

#### Next 90 days



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

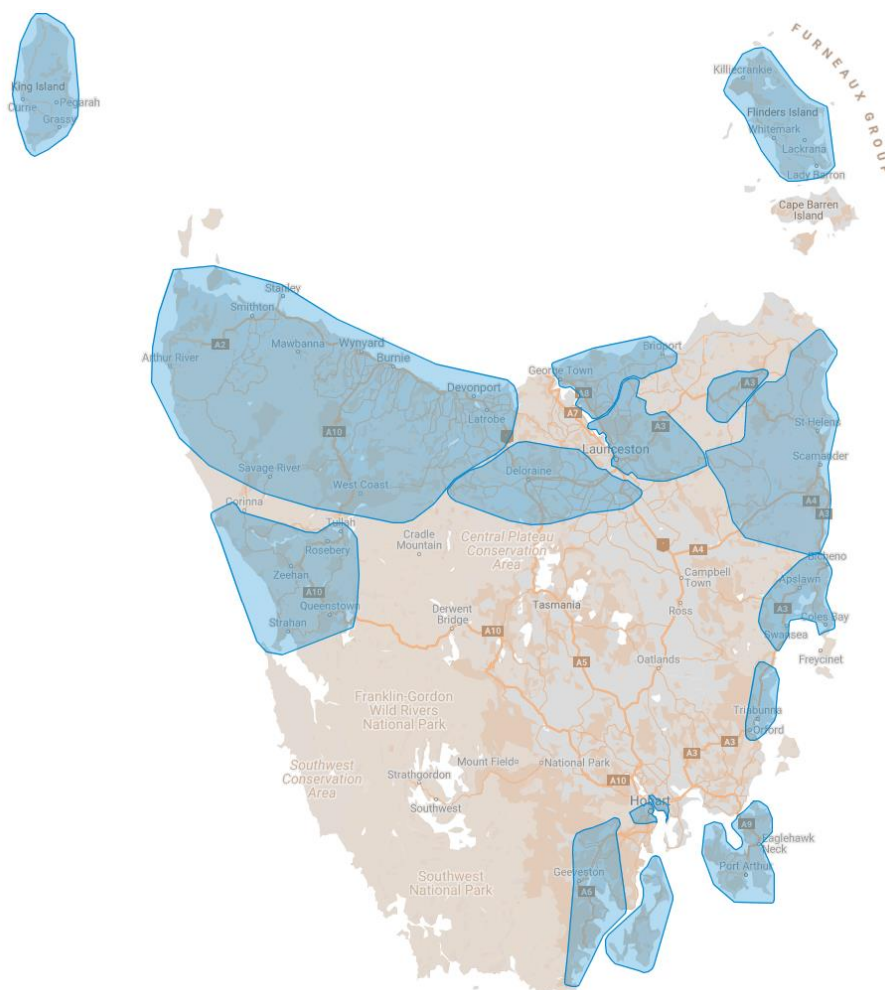
### Help us improve this data

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 | 27 June 2022 to 12 September 2022

	2022	2021	% change	2019	% change	% share of state demand for this period in:		
						2022	2021	2019
Tasmania	71,328	45,311	57%	61,067	17%			
Hobart	16,801	8,608	95%	17,652	-5%	23.6%	19.0%	28.9%
Launceston	6,152	3,788	62%	7,180	-14%	8.6%	8.4%	11.8%
King Island	539	461	17%	386	40%	0.8%	1.0%	0.6%
Flinders Island	402	415	-3%	140	187%	0.6%	0.9%	0.2%
East Tamar-Bridport	1,557	927	68%	911	71%	2.2%	2.0%	1.5%
Deloraine-Evandale	1,934	1,241	56%	1,306	48%	2.7%	2.7%	2.1%
Derby	938	717	31%	484	94%	1.3%	1.6%	0.8%
Orford	930	560	66%	741	26%	1.3%	1.2%	1.2%
Tasman Peninsula	1,809	1,655	9%	1,377	31%	2.5%	3.7%	2.3%
Bruny Island	3,249	2,357	38%	2,052	58%	4.6%	5.2%	3.4%
Huon-Far South	3,136	1,988	58%	2,348	34%	4.4%	4.4%	3.8%
Eastern Shore (Hobart)	2,356	1,323	78%	2,314	2%	3.3%	2.9%	3.8%
Freycinet	5,832	3,465	68%	3,747	56%	8.2%	7.6%	6.1%
NE Coast	3,626	3,025	20%	2,274	59%	5.1%	6.7%	3.7%
West Coast	1,824	1,039	76%	1,028	77%	2.6%	2.3%	1.7%
North West	6,533	4,159	57%	4,688	39%	9.2%	9.2%	7.7%

The charts on the following pages provide a view forward over the coming 12 weeks, based on bookings as at the week commencing June 27, 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 September. State-wide demand (booked nights) over the next three months is 17% 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.

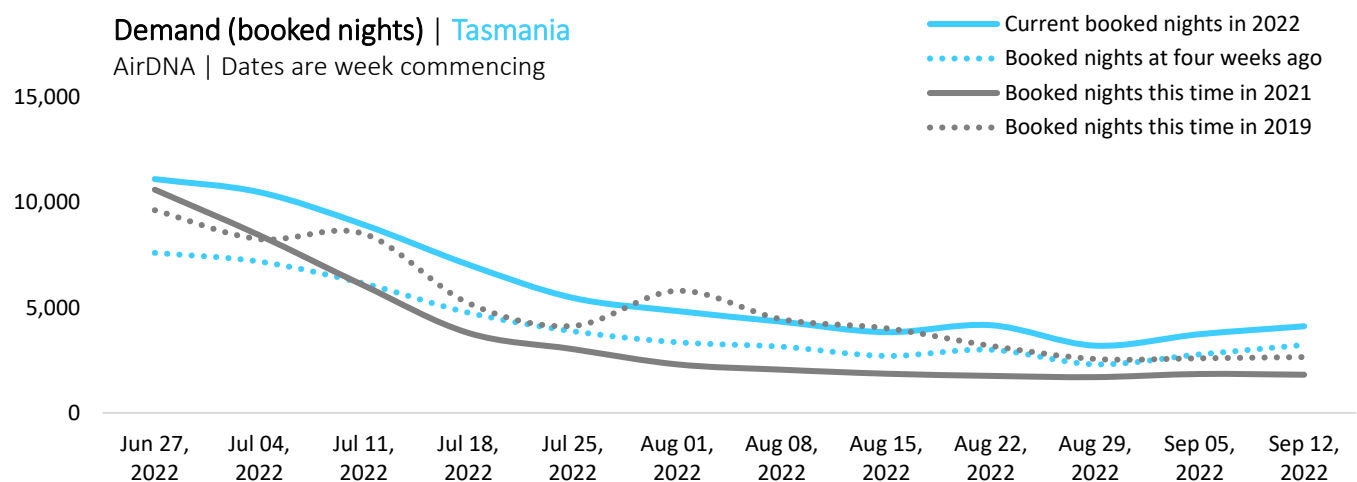
Looking forward, whilst there is fluctuation across each region, the overall demand (booked nights) for short-stay accommodation (solid blue line) is indicating improvements from previous years. The dotted blue line (booked nights at four weeks ago) indicates that there is a sustained pick-up of bookings, with reduced booking windows remaining in play. The level of demand in place for July and September remain largely comparable to levels recorded in both months of 2019, meaning a particularly strong recovery for this period in this sector into the 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 reinstated for VIC and NSW.

## TASMANIA | Short-stay accommodation

### Demand (booked nights) | Tasmania

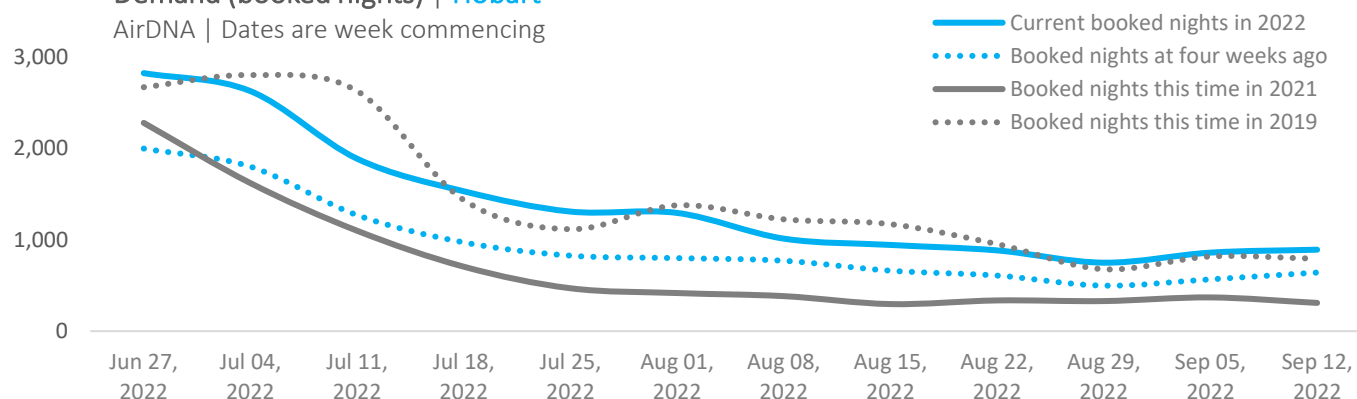
AirDNA | Dates are week commencing



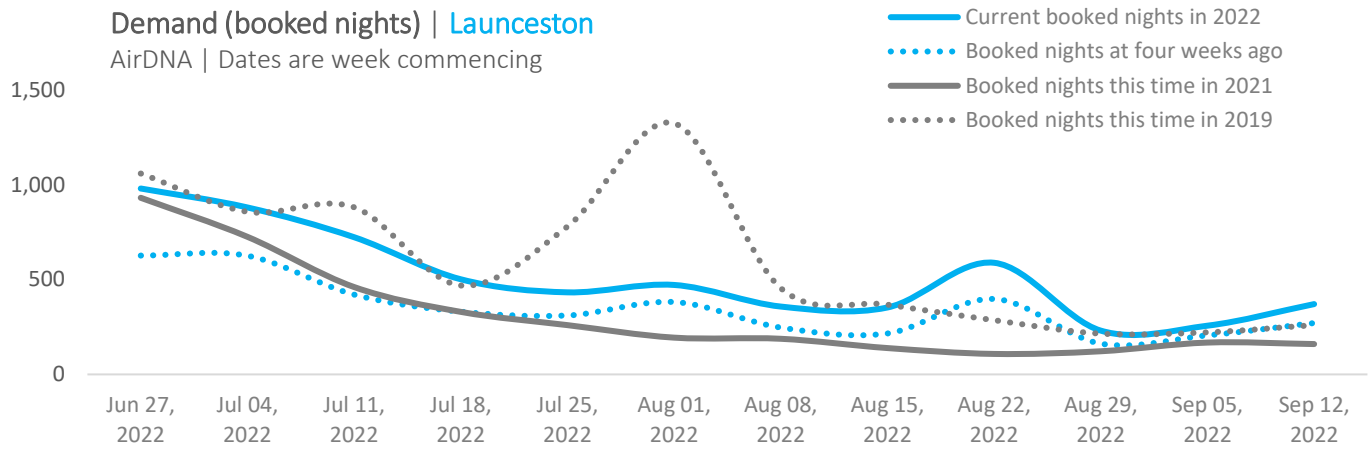
## Hobart | Short-stay accommodation

### Demand (booked nights) | Hobart

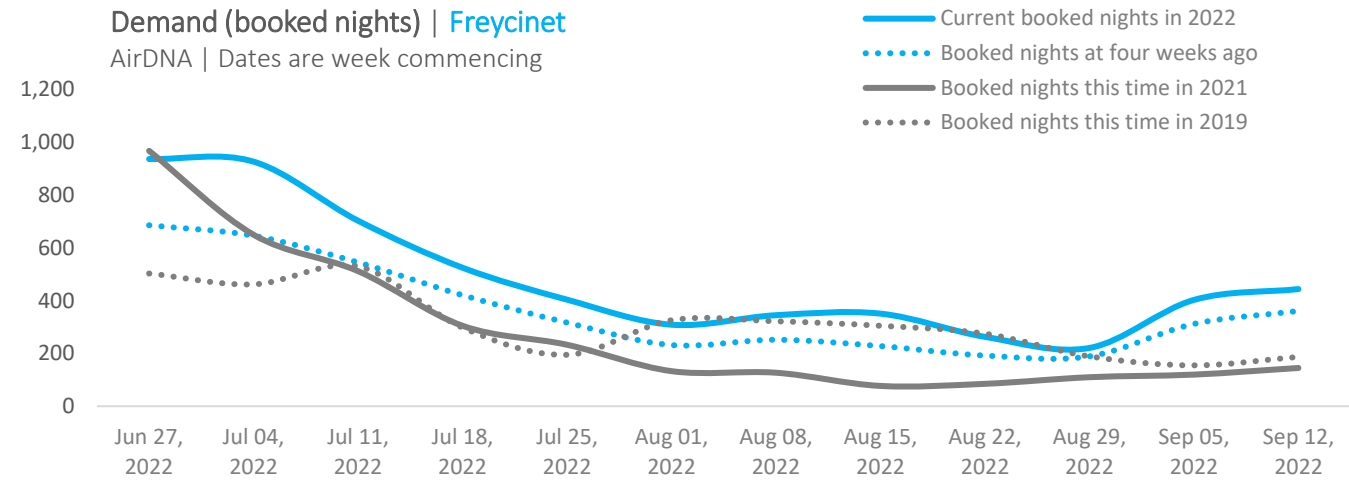
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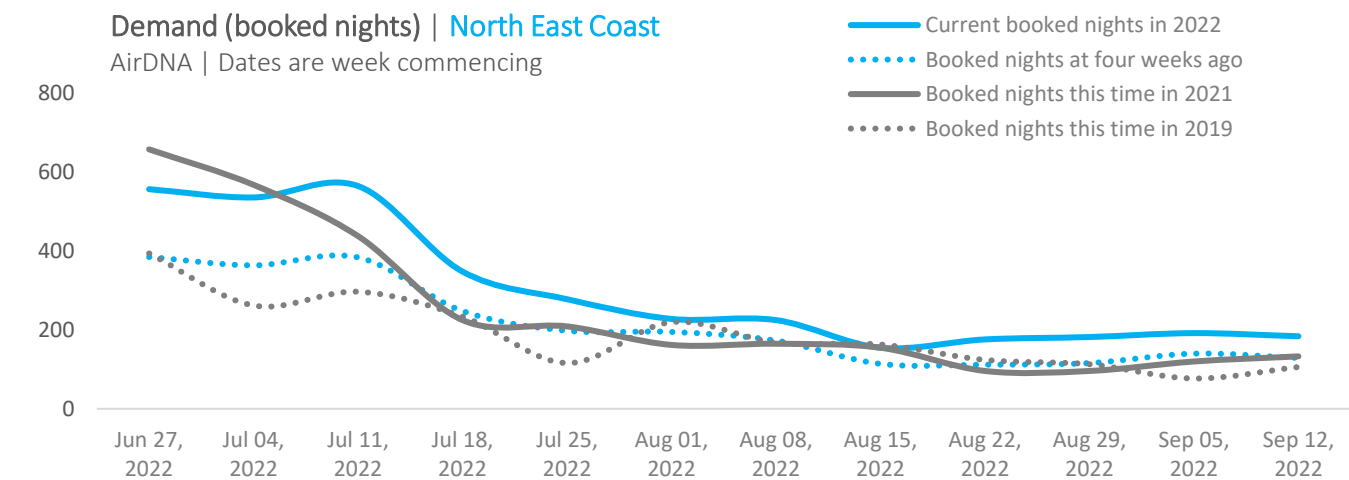
## Launceston | Short-stay accommodation



## Freycinet | Short-stay accommodation



## North East Coast | Short-stay accommodation

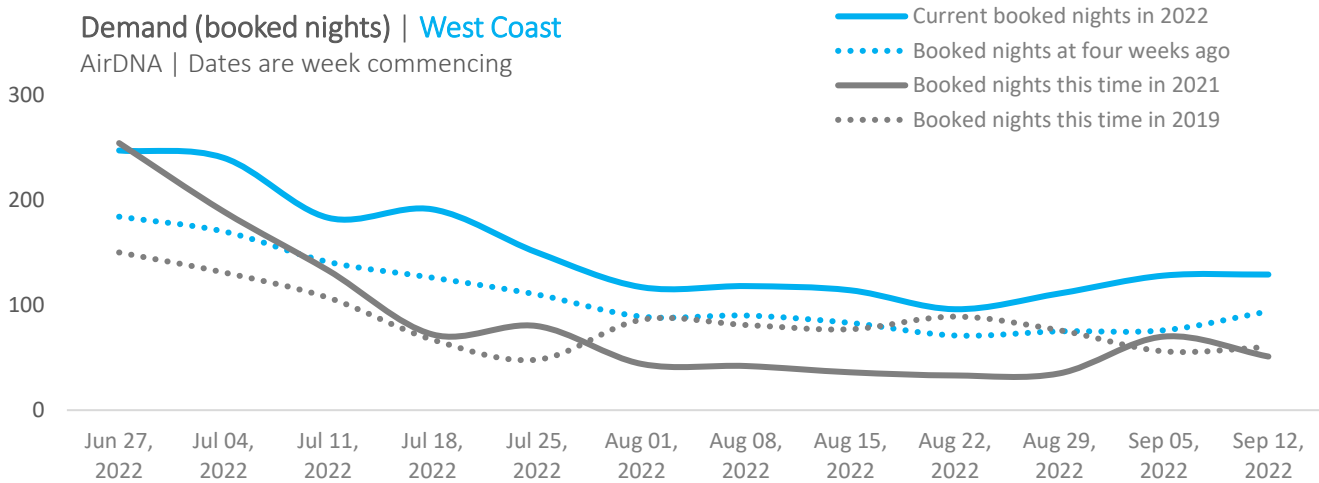




## West Coast | Short-stay accommodation

### Demand (booked nights) | West Coast

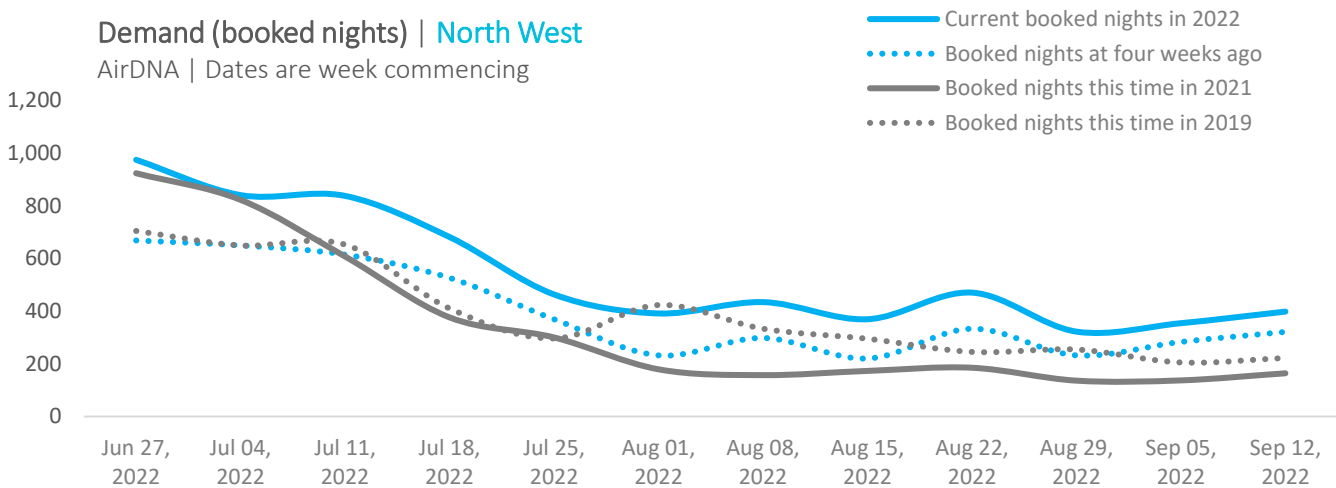
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## North West | Short-stay accommodation

### Demand (booked nights) | North West

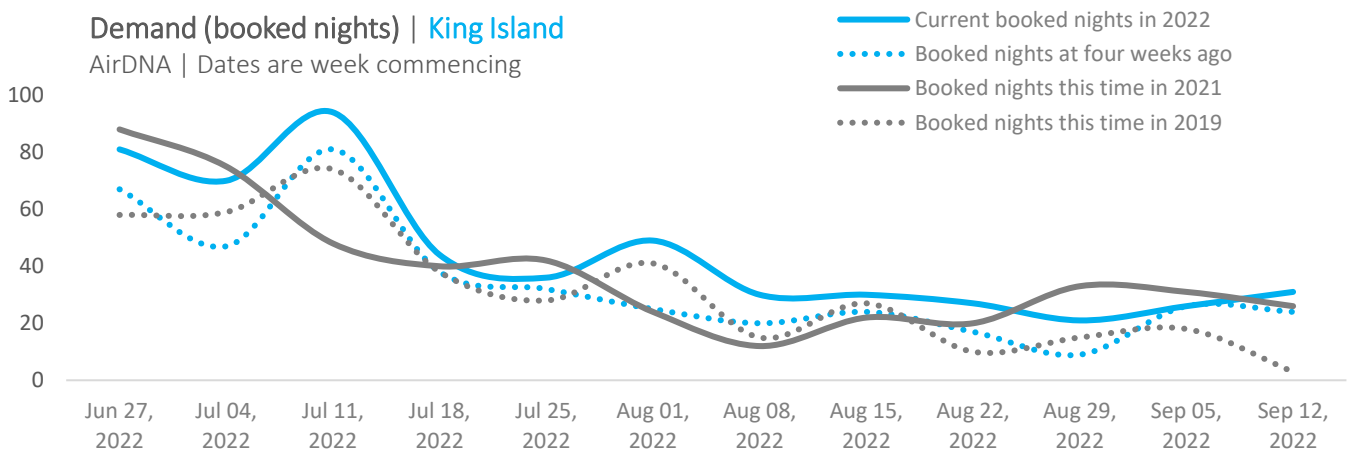
AirDNA | Dates are week commencing



## King Island | Short-stay accommodation

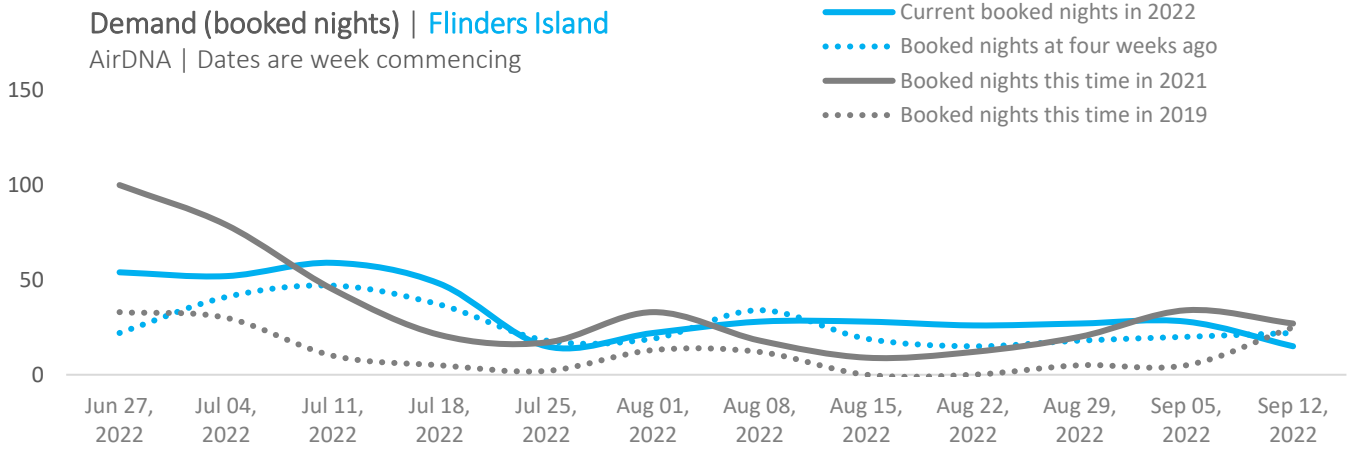
### Demand (booked nights) | King Island

AirDNA | Dates are week commencing

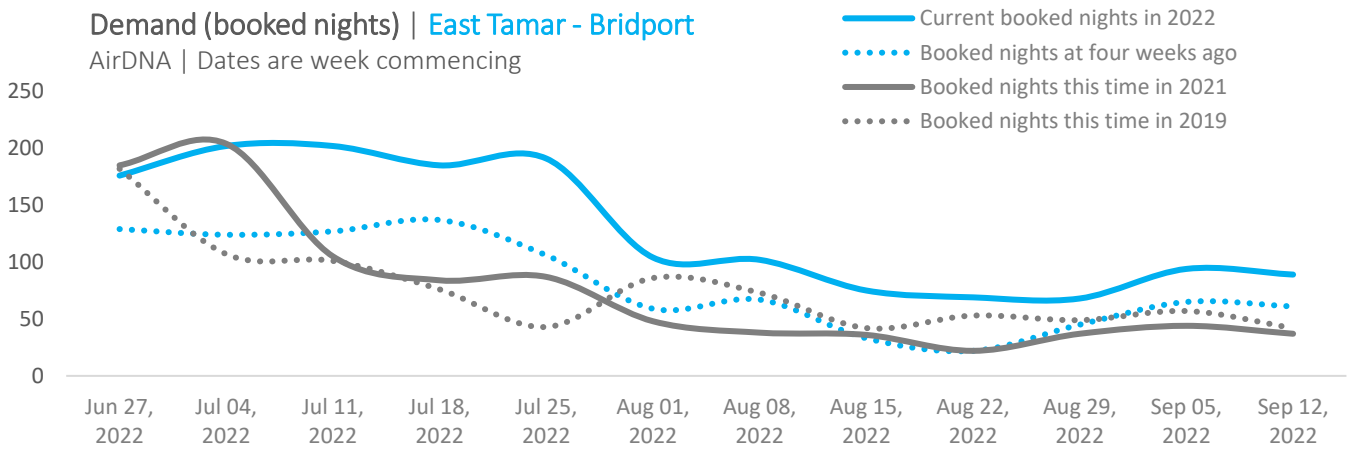




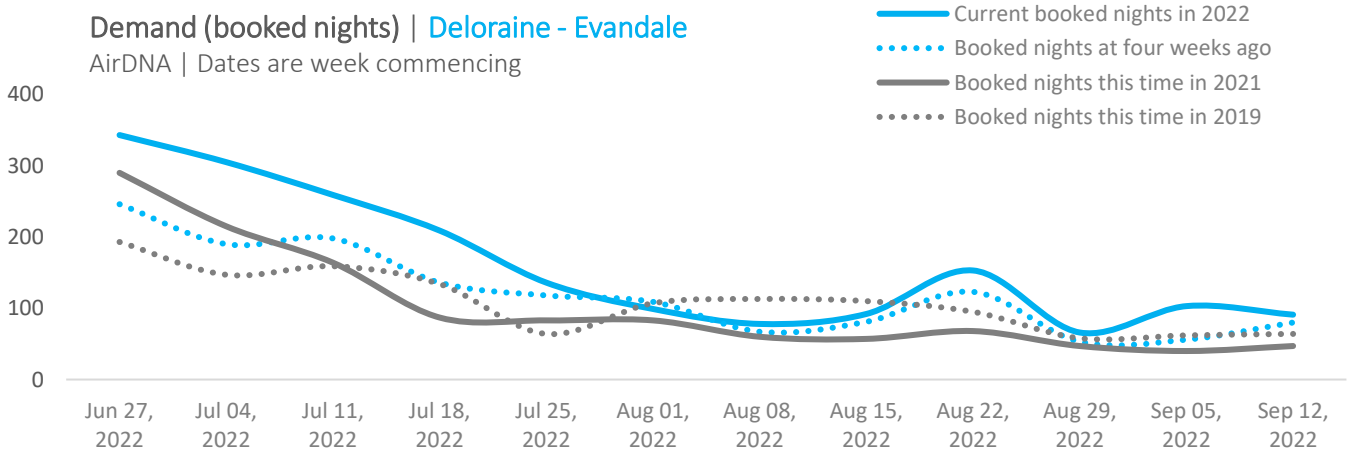
## Flinders Island | Short-stay accommodation



## East Tamar - Bridport | Short-stay accommodation



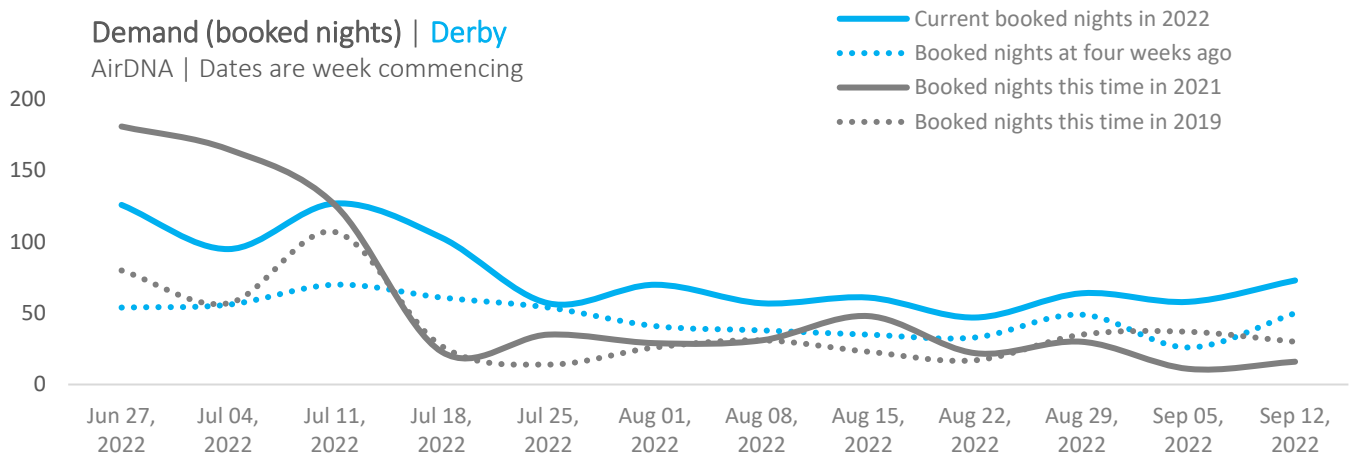
## Deloraine – Evandale | Short-stay accommodation



## Derby | Short-stay accommodation

### Demand (booked nights) | Derby

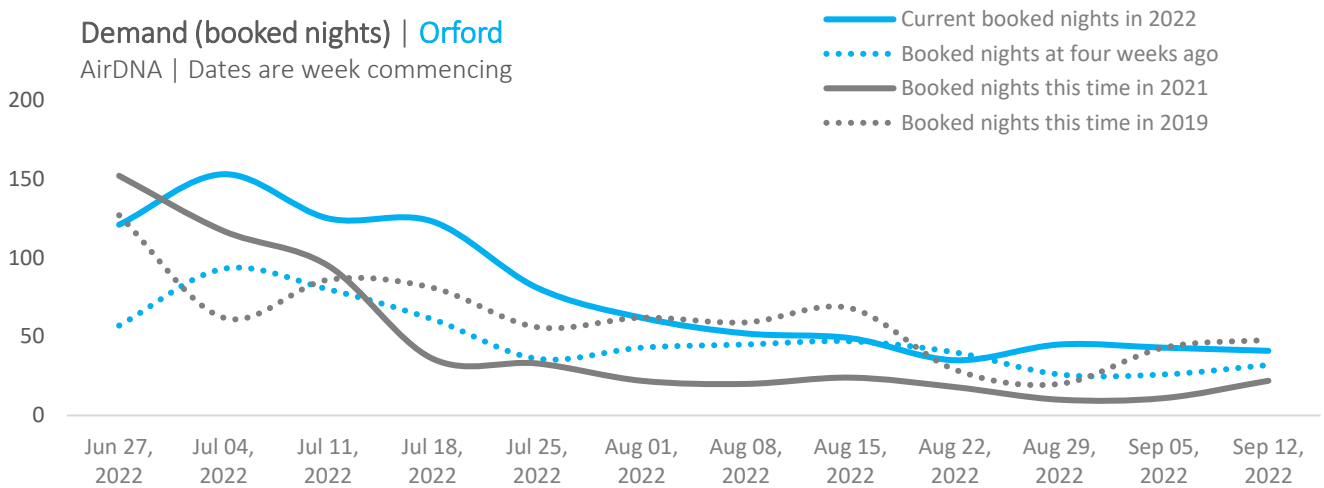
AirDNA | Dates are week commencing



## Orford | Short-stay accommodation

### Demand (booked nights) | Orford

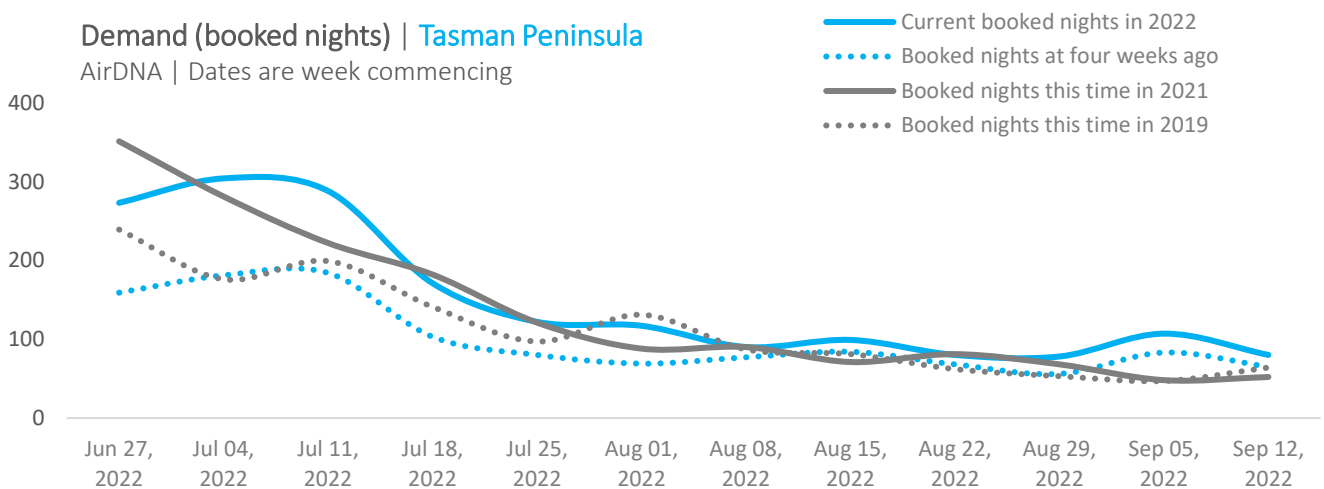
AirDNA | Dates are week commencing



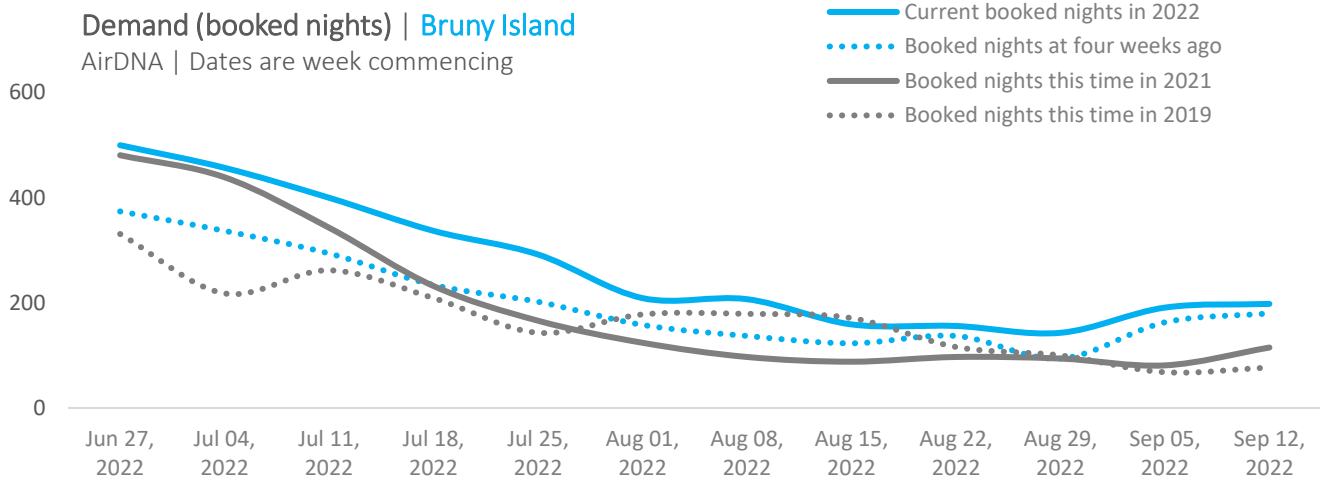
## Tasman Peninsula | Short-stay accommodation

### Demand (booked nights) | Tasman Peninsula

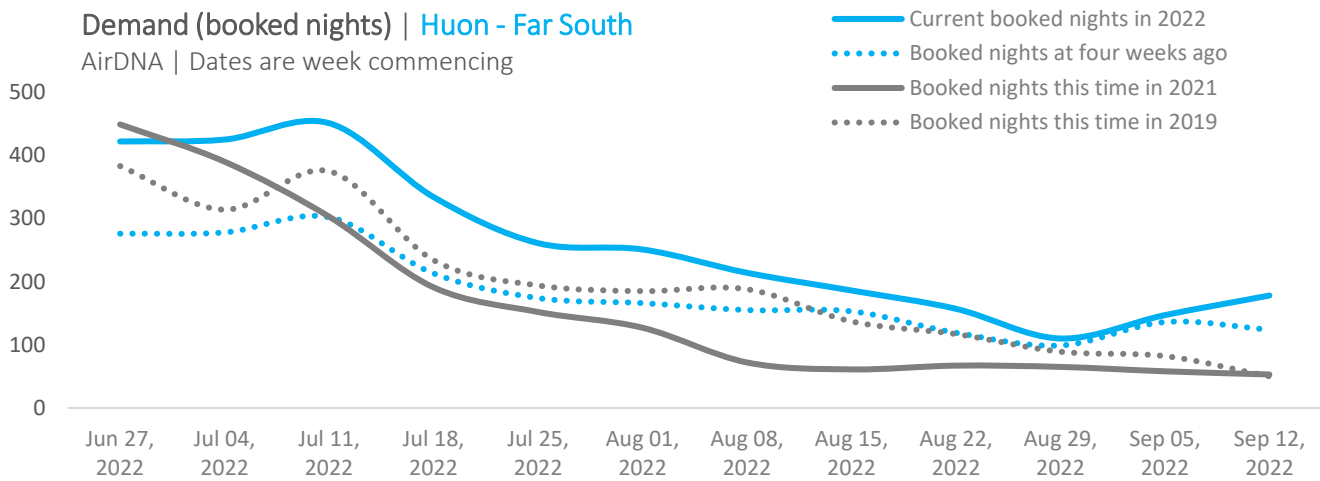
AirDNA | Dates are week commencing



## Bruny Island | Short-stay accommodation



## Huon – Far South | Short-stay accommodation



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

