

2023

# SPORTS AND ENTERTAINMENT

## TRAVEL INDUSTRY INSIGHTS

# Unlocking the Magic

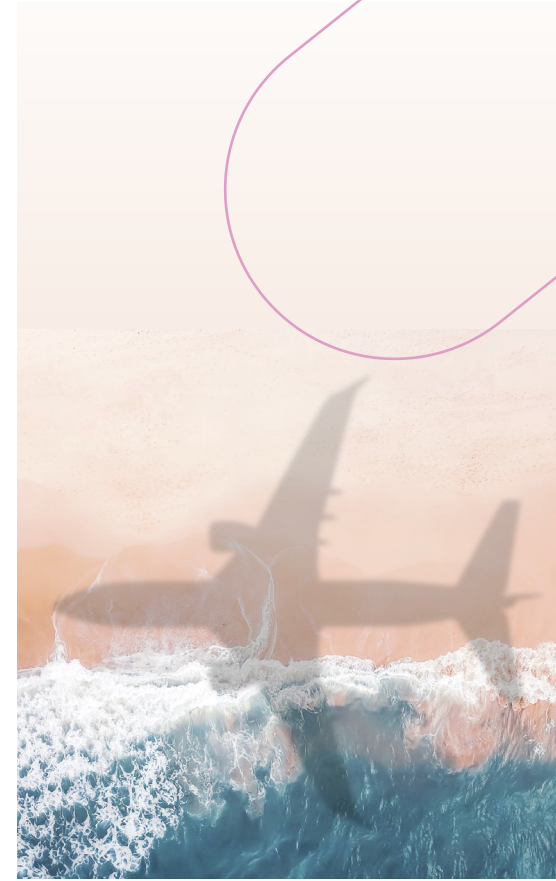
## 2023 IS THE YEAR TMCS STEP INTO THE SPOTLIGHT

With Travel Management Companies in the director's chair of travel logistics, 2023 will be the year that the music, sports, and film industries can hit all the high notes, score big wins, and create award-winning blockbusters.

In a world where virtual connections dominate, there are some industries that refuse to follow the same beat: music, sports, and film production. According to Adam Moon, General Manager of Stage and Screen Travel Australia, "You can't play a game of footy online." Nope, they need the real deal!

While practically everyone else can handle their business through online connections, these industries thrive on the excitement of bringing people and equipment together at a specific venue and time – and that means you need to get the stars of the show (and their gear) there physically.

That's how 2023 has become the year that TMCs took their place at the table when it comes to strategising for the entertainment and sports industries.



## HAVING A GAME PLAN

TMCs are now part of the A-team and are acting as strategic advisors. They keep their heads in the game, always on the lookout for new trends and industry nuances. And with their killer connections in the events grapevine, they're always in the know.

“We have a bird's eye view of the industry. We keep our clients' information confidential, but we can recommend, for example, shifting a tour or shoot date because we know another major event is scheduled for that weekend. This way, we help them avoid premium prices for accommodation and flights,” adds Moon.

“Our customers realise the value that travel planners bring. They have come to appreciate our role not only as logistical wizards but also as strategic advisors. TMCs have transformed from mere suppliers to indispensable colleagues in the entertainment industry.”

This awesome collaboration has brought to the surface the true value of specialist travel agencies, revealing to clients just how crucial they can be in their strategy and planning squads.

Just like a seasoned basketball player's ability to read the game and make split-second decisions, or a skilled guitarist's mastery of timing and expression, experience plays a vital role in enhancing performance. Raw talent alone cannot match the expertise gained through years of industry-specific experience.

“Stage and Screen has been focused on these niche industries for the past 30 years. We understand what matters to them. But our experience extends beyond that. We've assisted numerous clients with similar requirements, and our portfolio of solutions draws from that wealth of experience. We share insights and suggestions that our clients might not have considered,” concludes Moon.



## FILM AND PRODUCTION

# The new golden age

Despite the challenges faced, the film and production industry has managed to keep the cameras rolling.

They've faced it all, from budget pressures to disrupted finances and difficulties in securing necessary insurance.

Rescheduling became the name of the game as locations were lost, and dates had to be changed. To add fuel to the fire, there was greater competition for Australian crew and facilities, driving up some costs. But amidst the chaos, there were a few silver linings. The pandemic led to increased US production in Australia, creating new business relationships and opportunities.

### The future is bright

- The year kicked off with news of the Australian Government's new Revive policy, aimed to boost and strengthen the film, music, entertainment, literature and arts fields over the next five years – backed by A\$286 million in dedicated funding. We'll raise a glass to that!

- The Federal Government announced that it will increase the screen industry's Location Offset from 16.5% to 30% from 1 July 2023 – ensuring Australia remains a globally competitive and desirable destination.

- Screen Australia's Drama Report 21/22 shows an all-time high expenditure in Australia on scripted screen production to the tune of A\$2.29 billion (made up of a record spend on Australian titles of \$1.51 billion, plus \$777 million spent on foreign productions).

“The screen sector in australia is thriving”

Kate Marks, Ausfilm CEO

- Screenwest and the Western Australian Government have opened a \$20 million production attraction incentive to entice foreign productions to the state.

- Ausfilm says repeat business is booming, with the likes of Universal Content Productions (Metropolis, Clickbait and Irreverent) and Marvel Studios (Thor: Love and Thunder) returning – and agreeing that

Australia has some of the best cast and crew in the world. Which we already knew.

- We will see more major foreign productions made in Australia, including the 8-episode series Metropolis, a sequel to Godzilla vs Kong (Queensland), The Fall Guy (New South Wales), Kingdom of the Planet of the Apes (New South Wales), and Land of Bad (Queensland). Some international productions announced in 2023 include Anyone But You, Ricky Stanicky, Apples Never Fall, Sleeping Dogs and Stars on Mars.

- The 2022/23 Screen Territory Funding Program also offers a Production Attraction Incentive Program, open to all Australian and international producers, production companies and studios.



Screen Australia's Drama Report 21/22 shows an all-time high expenditure on scripted screen production of A\$2.29 billion in Australia.”

levels of production, and the recent announcement of the 30% Location Offset will help cement our position as one of the world's top production destinations.

The Federal Government's announcement to increase the Location Offset from 16.5% to 30% from July 1, 2023, is outstanding news for the industry. Transitioning to an ongoing 30% Location Offset will provide long-term certainty to international clients looking to invest in Australia and cement our position as a leader in the global screen industry.

Companies can now more easily consider bringing a pipeline of activity to Australia, which will provide more stable and secure employment for Australian workers and businesses across the entire screen ecosystem. The industry is also working collaboratively to build skills and capacity, focusing on the below-the-line crew to ensure our sustainability and growth into the future.

With a combination of our competitive incentives and world-class screen businesses, we've seen a strong pipeline of productions choose Australia as a production destination.





## THE GLOBAL STAGE

**T**ravel feeling the impact of the Olympics. The approaching Paris 2024 Olympic and Paralympic Games have led to an increase in sports team travel, says the Australian Institute of Sport. Throughout the first quarter of 2023, over 1,000 athletes, coaches, and staff from 19 various sports have taken part in 39 training camps held in Canberra. Prominent women athletes and teams, including the Opals, Diamonds, and Senior Womens Artistic Gymnastic Squad, have been actively involved in these camps.

Australia is geared up for a sporting bonanza like no other! The nation is set to score big with its sports-loving population, top-quality infrastructure, and government support.

Australian Olympic Committee chief Matt Carroll calls it the green and gold "runway", culminating in the Brisbane Olympics in 2032. Over 30 major global sporting events are coming to Australia in the next ten years. Sports Minister Richard Colbeck called the coming blitz of events "unparalleled in our history" as Australia seeks to "grow our reputation as the pre-eminent sporting host nation in the world".

Australia has already aced hosting the likes of the **Australian Open tennis and Formula One 2022**. In an epic game-changing move, Australia and New Zealand teamed up to host the biggest **FIFA Women's World Cup** ever in August 2023. The groundbreaking tournament will be a hat-trick of firsts: the first co-hosted event, the first in the Southern Hemisphere, and the first with a staggering 32 teams!

Hold onto your seat because there are plenty more sporting thrills coming! **The British and Irish Lions rugby tour in 2025** will surely bring the house down, followed by the adrenaline-pumping **Commonwealth Games in 2026**. The **Netball World Cup in 2027** will have fans cheering their hearts out, and the **Presidents Cup golf tournament in 2028** will be a hole-in-one extravaganza.

## SPORTING EVENTS

# The countdown is on

### The Green and Gold Runway

The sports sector was buoyed by the successful hosting of the Men's ICC World T20 at the end of 2022, alongside incredible Australian performances at the Winter Olympics in Beijing, the world swimming championships in Budapest, the 150th British Open at St Andrews (Cameron Smith), the Giro d'Italia (Jai Hindley), the World Athletics Championships in Oregon (Eleanor Patterson) and countless success on the football field, athletics track and basketball court. From table tennis to surfing and swimming, Australians came to win.

#### 2023

FIFA Womens World Cup - July 20-August 20, 2023

Formula 1 Rolex Grand Prix - March 30-April 2 2023

World Surfing Championships - April 10-30, 2023

Ironman Australia - May 7, 2023

Hamilton Island Race Week - Aug 19-26, 2023

#### 2025

ICF Canoe Slalom World Championships



#### 2027

Rugby World Cup  
Netball World Cup

#### 2029

Women's Rugby World Cup

#### 2026

BMX World Championships  
Commonwealth Games

#### 2028

ICC Men's T20 World Cup

#### 2032

Brisbane Olympic and Paralympic Games



## MUSIC TOURS

# Hitting high notes

This year promises to be another musical extravaganza as a bunch of artists make their way to Australia, making up for shows that had to be postponed.

We are talking international pop powerhouses like Lizzo, Ed Sheeran, Lil Nas X, and Rina Sawayama. And

hold on tight because we've got rock royalty, too - My Chemical Romance and Red Hot Chili Peppers are ready to unleash their sonic fury.

But as the music scene finds its groove again, it's facing a symphony of challenges when it comes to touring.

- Flights are currently inflated, impacting the profitability of smaller touring bands.
- Audience buying habits have changed their tune too. Producers report a drop in pre-sale tickets, so they don't have a clear understanding of how a show will perform. If people aren't buying tickets in advance, they're stuck guessing whether or not you'll break even, making committing to flights and accommodation risky.
- Festivals are facing rising costs, staffing snafus, low consumer confidence, not to mention the fallout from climate change. According to Sydney Morning Herald, extreme weather events have caused cancellations or postponements of at least nine major Australian music festivals in 2022.

The waiting is over - postponed tours are coming.

Green shoots? In February 2023, The Government announced it would invest \$2.5 million to help Australian music festivals recover from the pandemic as part of the \$20 million Live Music Australia program. The 36 grants will support festivals nationwide - from folk music to country, pop and rock.

Alt-J's 'The Dream' tour, initially planned for September 2022, has been rescheduled for 2023.

Michael Bublé, who had to cancel his December tour of Australia due to logistical issues, simply postponed his tour to mid-2023, bringing his signature crooning to Down Under.

Helmet's 'The Best Of Helmet' tour, initially scheduled for 2020 but postponed due to the pandemic, will finally return to Australia in April 2024.



## UNIQUE INDUSTRIES, UNIQUE REQUIREMENTS

**F**asten your seatbelts – there is still some turbulence up ahead for group bookings.

Organising travel for film and music production crews or sporting events is like mastering a delicate dance – it's truly an art form! From juggling schedule changes to navigating baggage allowances, the logistics involved in booking large-scale group travel can be quite a challenge. There's no one-size-fits-all solution in this industry, which means it heavily relies on the capacity and flexibility of travel suppliers.

So, where are we with that?

### Air travel (still) unreliable

Capacity is up. We're not quite cruising at pre-COVID altitude, but we're on the right flight path. Airline schedules for 2023 are forecast to see just **0.8%** fewer seats than in 2019. In **Q2 2023**, Australia and New Zealand were over **90%** recovered, with Qantas back at **98%** capacity and Virgin Australia at **88%**.

Challenges: The airlines have yet to release all their routings, and this, coupled with a shortage of pilots, is leaving travellers with limited options and last-minute cancellations. This is particularly challenging for group travel as flights can be bumped to the next flight, causing disruptions in group bookings. As if that wasn't enough, they also have a shortage of customer service people in their call centres. The high jet fuel price has contributed to higher airfares over the past year due to the war in Ukraine. Unfortunately, during Q2-2023, jet fuel prices further shifted up as the northern summer demand grew and Asia travel strengthened.

**The number of domestic routes has stabilised – but will grow thanks to new carriers joining the market.**

In January 2023, Australia had a total of 154 active domestic routes\*, which remained unchanged from October 2022 and were only slightly lower than the pre-COVID-19 level. Since April 2022, the overall size of the domestic network has remained relatively stable. From February 2023, the number of domestic routes began to increase with the entry of Bonza into the market.

*\*Source: ACC Airline competition report Australia March 2023*

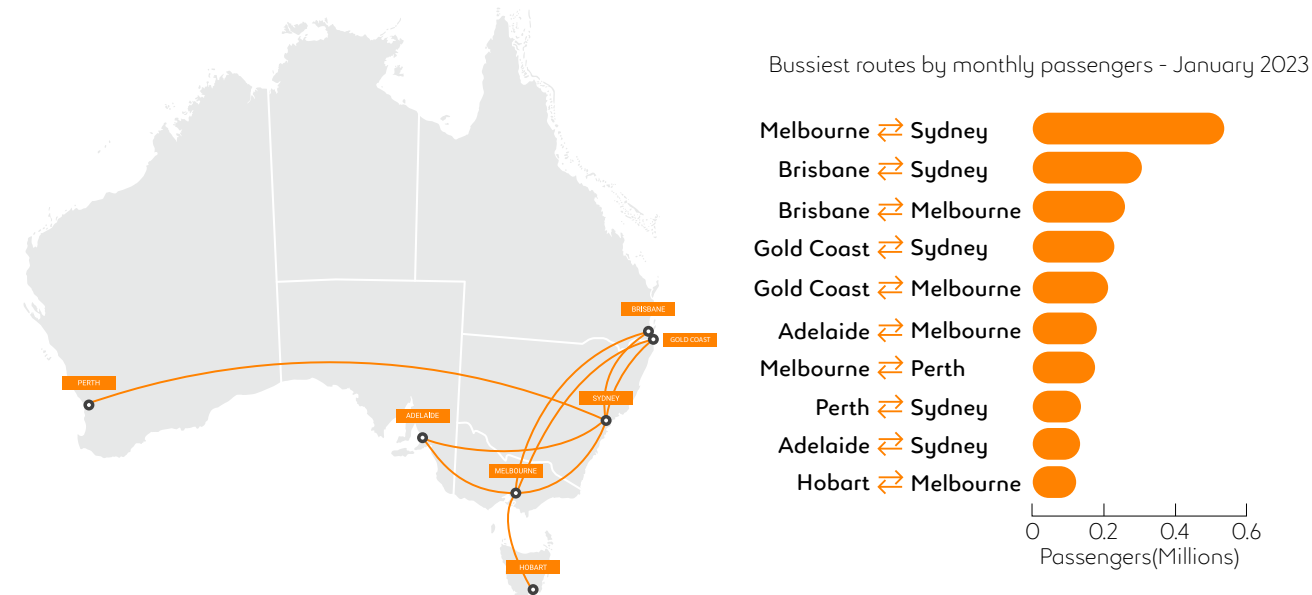


### The upside:

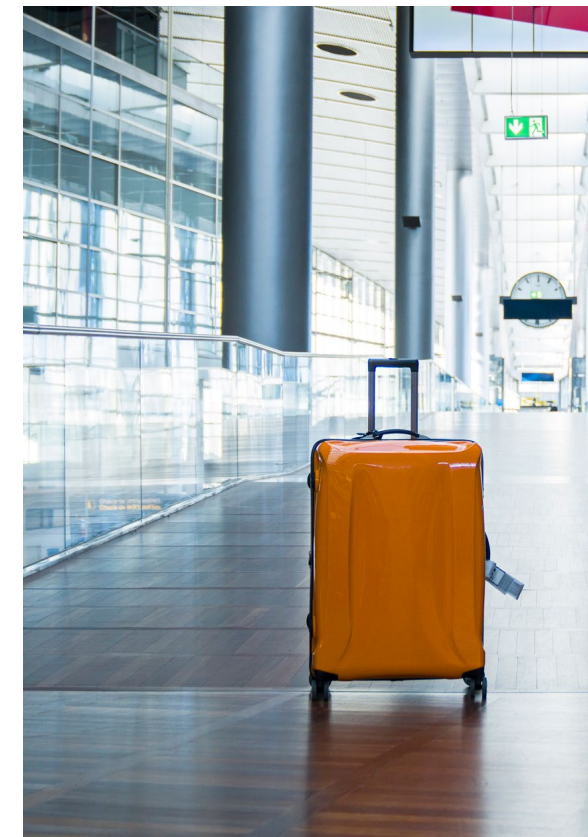
Airlines make an effort to retain group bookings, but the situation has made air travel unpredictable and requires careful consideration when planning group travel arrangements.

### What this means for clients:

When picking a TMC, it's good to go for one with solid airline relationships. Take Stage and Screen, for instance. With us, you can tap into our exclusive deals and snag some fantastic airfares with Rex Airlines.



*Source: Data collected by the ACCC from Qantas, Jetstar, Virgin Australia and Rex.*



### On International Travel...

“Once flying internationally becomes more affordable, with supply matching demand, we will witness a strong comeback for both inbound and outbound travel in the music, film and sporting industries”

*says Stage and Screen*





## WHERE ARE AIRFARES HEADED?

In the second quarter of 2023, business class fares were up **27%** in Australia and New Zealand, with Economy Class up **19%** compared to the same period in 2019.

## LIGHTS, CAMERA, EXCESS BAGGAGE

**E**vent organisers in the worlds of film and live music face a weighty challenge: transporting their bulky equipment and instruments and fragile equipment.

Try to fit a grand piano into a carry-on! For touring teams, there's all their gear to accommodate. Airlines offer excess baggage allowance but at a cost. And with limited flexibility and fewer flights, baggage space has become premium.

**What this means for clients:** As the demand for air shipping skyrockets, it's getting trickier than ever to find room for those big and heavy hunks of equipment. That's where Stage and Screen's specialised travel management team comes in. We offer great rates for baggage and have a network of contacts that allows us to provide comprehensive travel and freight solutions from venue to venue, door to door. We can even consolidate your freight charges and process them as a single payment for your convenience.

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Top challenges in the airline market



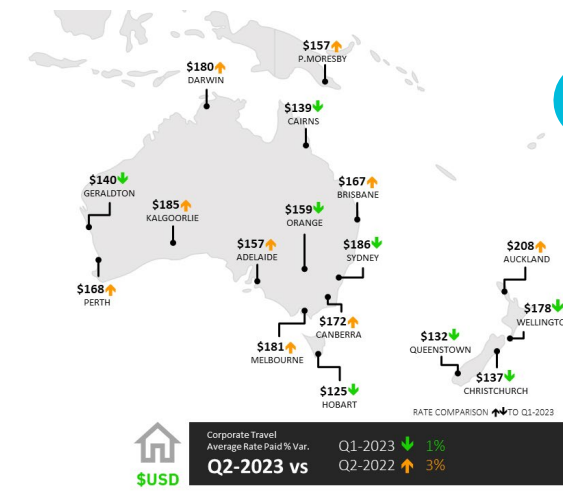
## Hotels: rooms rates and capacity set to improve

Finding hotels that can hit all the right notes for large groups can be challenging. When a big event rolls into town, the demand for accommodations shoots up. Spectators flock in like groupies at a music concert, making it a real scramble for available rooms. Sean Hunt, Marriott International's area vice president for Australia, New Zealand and the Pacific, told the Financial Review that the group is seeing big returns of international travellers, especially to Melbourne for the tennis (their US visitor business is up 65% year-on-year).

And let's not forget about the crews and sporting support teams who need more than just a regular suite. They need extra security and round-the-clock room service (because musos party late and athletes rise early).

With more people filling up accommodations, along with a shortage of workers and general inflationary trends, the demand for rooms has skyrocketed. As a result, room rates reached new record levels – and inventory is low for group bookings.

**Challenges:** Group travellers don't have the variety or quantity of suppliers we had before. For example, a hotel may have 400 room capacity on paper, but it is only operating at 70% capacity because of labour shortages.



### The upside:

- According to a report by Colliers, almost 6,000 hotel rooms are under construction and will enter the market in 2023, nearly double the 3,420 that opened in 2022. These include a new Ritz-Carlton in Melbourne, a W in Sydney and Vibe in Adelaide.
- The hospitality industry is taking steps to get our local workforce back to full speed.
- Hotels are becoming increasingly innovative with lifestyle hotels now a popular option. Ingredients of a lifestyle hotel include lobbies that encourage interaction, offering green initiatives, having slick technology and offering wellbeing choices. Newer hotels such as Lyf Collingwood, Melbourne are challenging legacy hotels.

**What this means for clients:** Corporate agreements and negotiating rates are super important. And guess what? Your travel manager needs to be crystal clear about what they can and can't do to help you out. They can't negotiate regarding "heads on pillows" (the basic accommodation), but they can undoubtedly negotiate sweet extra perks and benefits for you.

Top challenges in the airline market





## TRAVEL TRENDS

As you can read, it's an exciting time in arts, entertainment and sport in Australia.

And as productions pick up, calendars fill and sporting events kick off certain trends are beginning to emerge. For example, women's sport continues to grow in popularity. And not only did the Australian women win the ODI Cricket World Cup in South Africa (with record crowds turning up to the event) but Australia won the 2021-22 World Rugby Women's Sevens – and we're set to host the women's Rugby World Cup in 2029!

Also rising in popularity is youth sport, which brings with it its own special challenges in terms of travel, accommodation and duty of care for students, parents, families and fans.

And who can forget Gen Z, the young, dynamic and diverse generation whose music consumption (listening to music, on average, for four hours a day) and media habits are shaping the music industry, video-on-demand platforms and streaming services.

But unsurprisingly it's the trends playing out in the event/group travel space that have our attention, and we reckon 2023 is all about:

### 1 Traveller Confidence is Staging a Comeback

Traveller confidence is on the up! According to Expedia Group's 2023 Q2 Travel Insights Report, travel searches are increasing globally, with APAC taking centre stage with a notable 65% YoY increase. People are searching, planning, booking and taking to the skies in greater (happier, more confident) numbers, with global leisure travel up approximately 31% in March 2023 compared to the same period in 2019 (Mastercard Economics Institute).

Interestingly, research also reveals that as people get back to travel, the spotlight is on unforgettable experiences. In fact, the Mastercard Economics Institute's Travel Industry Trends 2023 Report showcases how "travellers are harmonizing with unique experiences in destinations worldwide, with spending on experiences up 65% compared to 2019 as of March 2023."

How does the team at Stage and Screen know that traveller confidence is staging a comeback? Simple: event lead times are much shorter than before Covid!

In pre-pandemic days, you could expect a fairly comfortable 12-month prelude for a major concert tour. Today, we're orchestrating the travel arrangements and logistics for events of the same magnitude in under three months. The high demand for events and experiences means lead times are shorter as Australians – and the world – compose a grand performance to make up for lost time.

We also know that by the end of 2022, clients planning for virtual and hybrid conferences had dropped by 75% compared to 2021. It's all about in-person events, and with budgets ready and no concerns about interruptions or cancellations we're witnessing a blockbuster of events being planned for 2023, surpassing even the levels of 2019. Game on!



## 2 Costs, Capacity and Staffing Constraints (aka the three Cs) OR Budget Bumps, Capacity Crunch, and Cast Constraints

Happily, traveller confidence is being matched by an increase in air capacity/available seats – powered by new travel corridors and China finally rolling out the red carpet for travellers again! On the flip side, travel costs are still hitting high notes due to increased travel demand, the soaring price of jet fuel, and inflationary pressure.

Labour shortages also remain a challenge as the entire industry looks to attract, train and retain staff. In terms of accommodation, this means average global rates are set to climb in 2023 (as salaries and training costs are passed onto the end consumer), supply/availability is tight, and the guest experience, depending on the property, may still be a little hit and miss.

And can you believe it? The aviation sector is still wrestling with cast (aka staffing) constraints, with experts warning of another turbulent summer in the US and Europe.

In a nutshell, the travel stage remains unpredictable. Our top advice? Secure your ticket early and enlist the services of a Travel Management Company (TMC) to direct every act of your travel journey.

### Labour and the skills shortage an issue

Tourism Accommodation Australia CEO and Interim Accommodation Association CEO Michael Johnson

“Australia's accommodation providers have had almost every challenge possible thrown at them in recent years with COVID coming on top of floods and bushfires, but the resilience, determination and professionalism always shine through.

Labour and the skills shortage continue to be the major issue, and unfortunately, there's no easy fix. We've got a great working relationship with the Government at all levels, which has allowed us to secure some important wins, including incentives to attract Working Holiday Makers and the return of International Students as we rebuild our workforce.

We've also taken steps ourselves to get our local workforce back to full speed. We had set up a number of innovative approaches pre-pandemic to attract more people into our sector, including those who haven't traditionally thought about working in hotels.

These measures have been tremendously successful and have won Government support. The headwinds of concern continue to be inflation, interest rates and International arrivals that form such a major component of our visitor economy, particularly in our gateway cities.”



### 3 Sustainability Spotlight

Stage and Screen customers are eco-conscious travellers of note! While price is still important, sustainability is a huge priority and each and every customer we engage with is interested in our sustainability partnerships (for example, with Tasmin Environmental Markets and their BlueHalo® carbon offset calculator) and measuring, offset and reporting capabilities.

From a travel perspective, Stage and Screen has the tools and partners to help customers measure, reduce and offset their carbon footprint. We can also identify green airlines, hotels and ground transport suppliers – with verifiable credentials and certification in place – so customers can make an informed choice. We're working hard to educate and empower travellers when it comes to sustainability, including sharing best practices and working together to update policies and processes that allow organisations to adopt better travel behaviours.

From an industry perspective, there is definitely a new scrutiny on the sustainability and environmental footprint of events, with organisers having to consider everything from travel to transport, venues and waste management.

A new report from the Global Business Travel Association (GBTA) shows that while members are at different points in their sustainability journey, they are focussed on controlling the environmental impact of their events. The GBTA explains that while the first step is to encourage travellers to seek lower carbon options, the next step will be travel policy mandates – with carbon fees and carbon budgets as “the next blockbuster frontier”.



### 4 Scripted Strategies and Harmonized Insight

Excitingly for Stage and Screen, travel has become a crucial scene in the script when it comes to large scale tours and events. As Adam Moon, the GM of Stage and Screen Australia, explains, TMCs truly showcased their star power during the pandemic, and now clients are casting our team in earlier and earlier in the planning process.

“We’re able to offer advice around timing, for example, we may be able to suggest to a client that they avoid hosting an event in a particular city over a certain weekend because we know there are already a number of events being held at the same time. If you don’t ask for advice early on, you could make things challenging – and expensive – for yourself in terms of availability when it comes to flights and accommodation,” says Moon.

“And when it comes to regional travel, we know when chartering a plane can actually work out cheaper, not to mention more convenient, than trying to source enough seats on a standard airline.”

For Moon, being able to offer strategic insight on everything from budgets and timing to accommodation and excess baggage is our USP. “We’re proactive – and an invaluable part of logistics planning.”

#### Walking the Flexibility Tightrope

Anyone in charge of organising a music event will tell you that juggling booking accommodations and ticket sales feels like walking a tightrope. You don’t want to book accommodation until ticket sales are solid. But you also don’t want to leave reservations too late. It’s a tough call! And it’s a reality for the music biz where the show won’t go on until you know you can fill seats.

The key is to keep things as flexible as possible, as long as you can. The problem? Making hotel reservations ahead of time has its perks. Booking early not only secures better rates but also provides more room for negotiation. So pushing the booking deadline isn’t always the best call – plus those cancellation policies are often not as rigid as you think. That’s where a TMC comes in.

For instance, Stage and Screen can negotiate a cancellation policy that gradually tiers the fees based on the proximity to the tour date. This reduces the risk for clients instead of imposing a sudden and severe penalty. If clients aren’t comfortable booking more than three months in advance, it’s not a problem. Negotiations can ensure that the cancellation terms don’t kick in until that point.

The strategy is simple: clients share their wishes upfront, even before finalising tour or shoot dates. TMCs can then work on their behalf, and these early requests carry more weight during negotiations.

“Booking 12 to 18 months ahead allows us to secure better terms with hotels. They appreciate the advance notice and can plan their leisure yield accordingly. We know the market dynamics and use this to our customers’ advantage,” shares Moon.





## THE FINAL ACT

We've seen a lot of change over the last year. Travellers are travelling differently (quality over quantity), staying longer, prioritising experiences over things, and squeezing everything they can out of each and every trip. Confidence is high. And not only in terms of the desire to travel and explore – but in TMCs, and how they can deliver the best end-to-end travel experience possible.

The past year has been a blockbuster of transformations in the entertainment world. Travelers have embraced a new script for their journeys. They've learned to travel with star power, focusing on quality over quantity, extending their stay like an epic trilogy, and chasing unforgettable experiences rather than material possessions. They're squeezing out every drop of excitement from each adventure, as if it were the grand finale of a thrilling movie.

The movie industry has its Oscars, the music industry has its Grammys, and the sports industry has its championships. And in this entertainment extravaganza, travelers are the stars, seeking out their own personal accolades and applaud-worthy adventures.

With TMCs in the director's chair of travel logistics, this year promises to be an unforgettable blockbuster, where dreams become reality and success takes center stage. In 2023, we're rewriting the script of travel, combining the magic of the movie industry, the rhythm of the music industry, and the thrill of the sports industry.

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They've faced it all, from budget pressures to disrupted finances and difficulties in securing necessary insurance.





Your strength behind the scenes