



# Oceania Market Outlook

**HTA Tourism Conference**  
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# MARKET OUTLOOK

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# GENERAL ECONOMY

While the pandemic recession was milder in Australia and New Zealand than in most other regions, the global cost of living increase and strong USD is having an effect on many people in Oceania and is set to continue into 2023.

## Unemployment Rate

3.3%

3.4%

## Exchange Rate

\$0.68

\$0.64

## Cash Rate

2.85%

4.25%

# TRAVEL RESTRICTIONS

This year, Covid-19 still had a powerful impact on the way people traveled.

The international border in Australia opened on 1 November 2021, but restrictions regarding pre and post testing and vaccination requirements remained in place until 6 July 2022.

In New Zealand, the international border opened on 31 July 2022 with testing and vaccination requirements removed on 13 September.



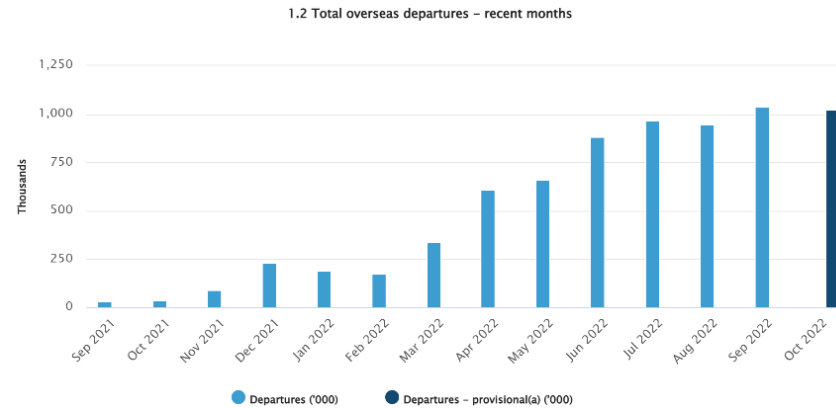
# CONSUMER TRAVEL SENTIMENT

## Overseas Trips taken 2019

11.3m

3.1m

## Overseas Trips taken 2022 AU



a. Provisional data for the most recent month has not had the full quality assurance methods applied as is done for the earlier months. Provisional data will be revised in the next issue of this publication.

Source: Australian Bureau of Statistics, Overseas Arrivals and Departures, Australia September 2022

## Top Destinations 2022 AU

2019	2022
New Zealand	New Zealand
Indonesia	USA
USA	India
UK	UK
China	Fiji

## Top Destinations 2022 NZ

2019	2022
Australia	Australia
USA	Fiji
Fiji	Cook Islands
China	UK
UK	USA

# TRAVEL TRADE TRENDS

## Main Trade Partners



## Travel Trade Landscape

- Flight Centre Travel Group remains our biggest retail travel agent partner
- Travel Associates a strong partner in the luxury sector
- Flight Centre Independents, which includes Travel Partners have had a very strong year with more revenue than Travel Associates for the first time
- Increase in work from home travel agents
- OTAs becoming more popular
- Luxury Escapes has gone from strength to strength and competitor TripADeal has been bought by Qantas
- MyHawaii has had their biggest ever year

# MEDIA TRENDS

- Digital continues to grow. Some publications that went online-only during Covid will remain so
- Online content platforms like Urban List, Concrete Playground and Broadsheet growing in popularity and are each launching dedicated travel sections
- Some content platforms and digital publications are launching their own integrated booking platforms, white labelled through Expedia
- Print travel publications remain important to the older demographic of travelers
- Travel TV programs are coming back. Luxury Escapes brought back their TV show this year, Getaway returned to international features and a new travel adventure show will launch later this year
- Instagram is still a popular social media for travel content with Reels, guides and stories getting the most engagement
- TikTok is becoming increasingly popular and not just with Gen Z
- YouTube is an important channel for travel, YouTube is the second most popular website in Australia after Google

# AIR CAPACITY

Scheduled seats	2022				
	Q1	Q2	Q3	Q4	Annual
<b>OCEANIA</b>	<b>27873</b>	<b>55415</b>	<b>79194</b>	<b>84693</b>	<b>247,175</b>
Auckland	0	0	21,643	23,445	45,088
Brisbane	2010	8040	8710	8710	27,470
Melbourne	25,863	47,375	48,841	52,538	174,617
Sydney	<b>27873</b>	<b>55415</b>	<b>79194</b>	<b>84693</b>	<b>247,175</b>

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules :

Scheduled flights	2022				
	Q1	Q2	Q3	Q4	Annual
<b>OCEANIA</b>	<b>95</b>	<b>183</b>	<b>267</b>	<b>283</b>	<b>828</b>
Auckland	0	0	77	81	158
Brisbane	6	24	26	26	82
Melbourne	89	159	164	176	588
Sydney	<b>95</b>	<b>183</b>	<b>267</b>	<b>283</b>	<b>828</b>

- Hawaiian Airlines five times a week from Sydney
- Qantas four times a week from Sydney
- Jetstar direct twice a week from Melbourne
- Hawaiian Airlines increasing to daily 1 – 15 Jan and again in April
- No plans from direct flights to resume from Brisbane
- Both Hawaiian Airlines & Air NZ flying 3 x per week ex Auckland with seasonal increases



# COMPETITION



- High awareness
- Easy and safe
- Short flight
- Large-scale post-Covid consumer campaigns

- High Awareness
- Cheaper travel
- Low cost airlines
- Short flight
- Ease of travel

- High awareness
- Just launched multi-million dollar outdoor and digital ad campaign

- High awareness
- Most popular USA destination
- Road trips and multi-destination itineraries
- Theme parks



# CHALLENGES & OPPORTUNITIES

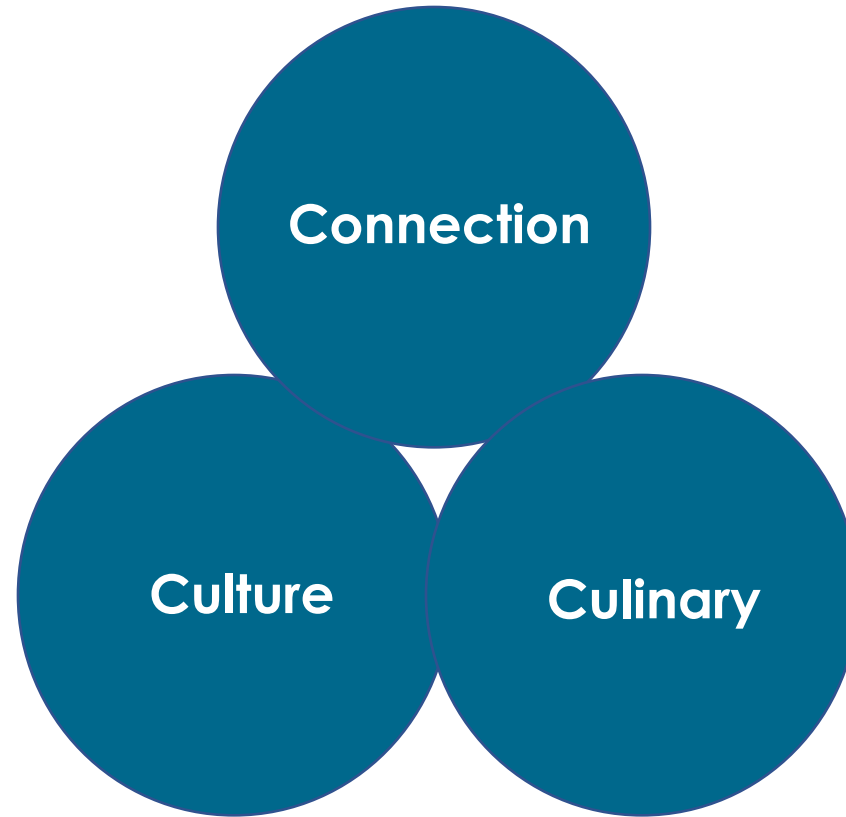
## Challenges

- Lack of flight capacity
- No direct flights from Brisbane
- Weak AUD/NZD
- Continuing to change the perception that the Hawaiian Islands is just a beach destination

## Opportunities

- Building on already high awareness of the destination in a way that adds depth
- Responsible and sustainable travel
- Culinary tourism
- Family travel
- SINKS and DINKS

# 2023 CAMPAIGN FOCUS



**MAHALO!**

