ICAO TRIP Symposium - Seamless Traveller Journey

Gloria Guevara
President & CEO
World Travel & Tourism Council
The Authority on World Travel & Tourism

The body representing the global Travel & Tourism private sector

For 30 years we have been quantifying the impact of Travel & Tourism in 185 countries in our Research

To talk as one voice on behalf of the Travel & Tourism sector:

• Fair economic policy for the sector
• Long term, sustainable growth
The Membership

- 170+ Members (CEOs and Chairs)
- All geographies
- All industries in Travel & Tourism
- The voice of the global private sector
- The Authority in Travel

Airports
- HILTON
  - Christopher J Nassetta
  - President & CEO
- CARNIVAL CORPORATION
  - Arnold Donald
  - President & CEO
- MANDARIN ORIENTAL
  - James Riley
  - Group Chief Executive
- VALUE RETAIL
  - Desirée Boîlier
  - Chair
- INTREPID GROUP
  - Darrell Wade
  - Co-Founder & Chairman
- BOTSWANA TOURISM ORGANISATION
  - Myra T. Sekgomoane
  - Chief Executive Officer
- MESSE BERLIN
  - Christian Göke
  - Chief Executive Officer
- AIG TRAVEL
  - Jeffrey C Rutledge
  - CEO
- EXPEDIA, INC
  - Mark Okerstrom
  - President & CEO
- JAPAN AIRLINES
  - Yuji Akasaka
  - Executive President

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  - President & CEO
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  - Yuji Akasaka
  - Executive President

Travel companies
- SHUN TAK HOLDINGS
  - Pansy Ho
  - Managing Director
- JTB CORP
  - Hiromi Tagawa
  - Chairman of the Board
- DUBAI AIRPORTS
  - Paul Griffith
  - CEO
- EMIRATES GROUP
  - Gary Chapman
  - President, Group Services
- SILVERSEA CRUISES
  - Manfredi Lefebvre
  - Chairman
- CTRIP.COM
  - Jane Jie Sun
  - CEO
- VIRTUAL
  - Matthew Upchurch
  - President & CEO
- RELAIS & CHÂTEAUX
  - Philippe Gombert
  - President International, Chairman Of The Board
- TURKISH AIRLINES
  - Bilal Eksi
  - Deputy Chairman & CEO
- V&A WATERFRONT
  - David Green
  - Chief Executive Officer

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Global Performance

Travel & Tourism Economic Impact 2019 (2018 Figures)

- Global GDP growth: 3.2%
- Travel & Tourism GDP growth: 3.9%
- Travel & Tourism total contribution to global GDP: 10.4%
- Jobs supported by Travel & Tourism: 319mn
- 1/10 of all new jobs created came from Travel & Tourism

International Spend: 28.8% vs Domestic Spend: 71.2%
Business Spend: 21.5% vs Leisure Spend: 78.5%

World’s Travel & Tourism GDP growth vs. economy GDP growth, 2011-18

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## Future Growth

WTTC Economic Impact Research (2019)

<table>
<thead>
<tr>
<th>Metric</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel &amp; Tourism contribution to global GDP (WTTC 2029)</td>
<td>10.4%</td>
</tr>
<tr>
<td>Jobs supported by Travel &amp; Tourism worldwide (WTTC 2029)</td>
<td>1/10</td>
</tr>
<tr>
<td>Travel &amp; Tourism contribution to global GDP (WTTC 2029)</td>
<td>11.5%</td>
</tr>
<tr>
<td>Jobs supported by Travel &amp; Tourism worldwide (WTTC 2029)</td>
<td>1/9</td>
</tr>
<tr>
<td>New jobs (WTTC 2029)</td>
<td>319 mn</td>
</tr>
<tr>
<td>New jobs (WTTC 2029)</td>
<td>421 mn</td>
</tr>
<tr>
<td>New jobs (WTTC 2029)</td>
<td>1/4</td>
</tr>
<tr>
<td>Travellers crossing international borders (UNWTO 2030)</td>
<td>1.8 bn</td>
</tr>
<tr>
<td>Air travellers worldwide (IATA 2037)</td>
<td>8.2 bn</td>
</tr>
</tbody>
</table>

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WTTC Vision
Travel & Tourism grows sustainably for a better world.

WTTC Mission
To maximise the inclusive and sustainable growth potential of T&T by partnering with governments, destinations, communities and other stakeholders to drive economic development, create jobs, reduce poverty and foster peace, security and understanding in our world.

Member Value & Engagement

Security & Travel Facilitation
- Seamless Traveller Journey
  - Biometrics
  - Federated identity
  - Seamless Passenger Journey:
    - Improved experience
    - Increased security
    - Increased number of travellers
    - Improved processes
- Visa Facilitation

Crisis Preparedness, Management & Recovery
- Minimise the Impact of Crisis
- Private Sector Engagement
- Development of Protocols:
  - Health & Pandemics
  - Natural Disasters
  - Security
- Communications

Sustainable Growth
- Destination Stewardship
  - Communities involved to reduce overcrowding (PPC)
  - Long term planning
- Climate & Environment Action
- The Future of Work
- Social Responsibility
  - Illegal trade in wildlife
  - Human trafficking

Technology & Digital Agenda
Communications
Strategic Priority

Security & Travel Facilitation

Seamless Traveller Journey

- Harmonized approach for the implementation of biometrics in Travel & Tourism
- Inter-operable, technology agnostic
- Seamless end-to-end journey (air and non-air) that is more safe, secure and efficient

Visa Facilitation
Security & Travel Facilitation: **Seamless Traveller Journey Progress Report**

- 200+ stakeholders in workshops & interviews
- Partnerships with IATA, US CBP & IBMATA
- Engaging with governments (minimum requirements)
- Biometrics Consumer Survey Europe / next USA
- Biometrics Showcase at WTTC 2019 Global Summit

**Key Finding**
- Currently there are **three types (53 initiatives)**

<table>
<thead>
<tr>
<th>Government (13)</th>
<th>Government &amp; Private (26)</th>
<th>Private (14)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1:1</td>
<td>1:N</td>
<td></td>
</tr>
<tr>
<td>• Trusted Traveller Programmes (Global Entry / UK Trusted Traveller / EasyPass…)</td>
<td>• Aruba Happy Flow</td>
<td>• FACES (Air Asia)</td>
</tr>
<tr>
<td>• Seamless Traveller (Australia)</td>
<td>• Heathrow Airport</td>
<td>• CLEAR (lounges, security lanes at airports and events)</td>
</tr>
<tr>
<td>• Chain of Trust (Canada)</td>
<td>• Digi Yatra (Bangalore)</td>
<td>• Biometric Boarding Pass (AF)</td>
</tr>
<tr>
<td>• National ID Cards</td>
<td>• FAST (Changi Airport)</td>
<td>• Hoteliers (Marriott)</td>
</tr>
<tr>
<td>• D4Fly (Europe)</td>
<td>• Seamless Flow (Netherlands)</td>
<td>• Cruise Lines (Carnival, RCCL, Disney)</td>
</tr>
<tr>
<td>• Smart Departure (Hong Kong)</td>
<td>• Smart Path Australia</td>
<td>• Finnair &amp; Finavia</td>
</tr>
<tr>
<td>• eGates</td>
<td>• Smart Pass (Korea)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• KTDI (WEF)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• OneID</td>
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</tbody>
</table>

1:N
- US Biometric Exit Trial (air and cruise), Delta, Jet Blue, Royal
- Smart Tunnel (Dubai)
Security & Travel Facilitation: **Seamless Traveller Journey**

**The Challenge and the Opportunity**

- **Growth opportunity**
  - 4.4 billion $\rightarrow$ 8.2 billion air passengers
  - Maximise capacity in infrastructure
  - 1 in 5 new jobs
  - 100 million new jobs

- **Benefit the entire sector**
  - Increase security
  - Process efficiency
  - Passenger experience
  - Air & Non-air

- **Alignment around adoption of biometrics**
  - No one solution for all
  - Interoperability
  - 3 emerging models
    - Government
    - Per Trip
    - Per Life

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Security & Travel Facilitation: Seamless Traveller Journey
Progress Report – Emerging Models

<table>
<thead>
<tr>
<th>Government Facilitated</th>
<th>Per Trip</th>
<th>Per Life</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Centralised Model</td>
<td>• Semi-federated model / per trip</td>
<td>• Federated model / per life</td>
</tr>
<tr>
<td>• Government is the service provider</td>
<td>• Single journey token</td>
<td>• Voluntary enrolment</td>
</tr>
<tr>
<td>• Platform leverages data on government databases</td>
<td>• Facial recognition</td>
<td>• Stored digitally</td>
</tr>
<tr>
<td>• No need for enrolment</td>
<td></td>
<td>• Traveller pushes data to given stakeholder pre-travel</td>
</tr>
</tbody>
</table>
<pre><code>                                                              |                                               | • Facial recognition                         |
</code></pre>

Roles & Responsibilities

Promotes the OneID Initiative – vision of an “end to end passenger experience that is secure, seamless, and efficient”

Expands the STJ concept beyond air, works with existing initiatives and facilitates progress for the entire traveller journey, and engages with governments

Developed Known Traveller Identity concept as possible solution to seamless travel, Shaping the Future of Security in Travel

Under facilitation, responsible for Annex 9 – Facilitation Standards and Recommended Practices (SARPs); development and implementation of the ICAO Traveller Identification Programme (TRIP) Strategy; and management of the ICAO Public Key Directory (PKD).

With IATA the NEXTT initiative explores New Experience Travel Technologies for airports
Security & Travel Facilitation: **Seamless Traveller Journey**

**Next Steps**

**ASSESS**
Assess and understand the current initiatives using biometrics worldwide

**ALIGN**
Align the industry by working with IATA on air, T&T sector on non-air, and engaging with governments

**DRIVE**
Drive the execution of global end-to-end round trip pilots

**DOCUMENT**
Document and quantify the benefits of the Seamless Traveller Journey

**LEAD**
Lead the drive for the adoption and deployment of biometrics

Alignment can only be achieved through a collaborative approach working with governments and border agencies, international organisations and industry associations, travel organisations and other key stakeholders.

Please **assign someone to join us** in working towards a Seamless Traveller Journey.

Contact Helena Bononi, Director of Industry Affairs
helena.bononi@wttc.org
1. Encourage member States to speed up adoption of ePassports and PKD

2. Adoption of ICAO's DTC to ensure interoperability

3. Priority – Biometrics
   - Increase security
   - Competitive advantage by participation

- ICAO Public Key Directory (PKD)
- Digital Travel Credential
Partner with WTTC

Let us know…

• If you want our help to quantify jobs created and positive impacts as a result of technologies such as biometrics in your country
• If WTTC can help with additional data to support your biometrics business case
  • US CBP: 1 million new jobs

• How can we help you?
  • Increase security
  • Facilitate travel
  • Make your work easier
Thank you

Gloria Guevara
President & CEO
World Travel & Tourism Council