

ICAO TRIP Symposium - Seamless Traveller Journey

Gloria Guevara
President & CEO
World Travel & Tourism Council



WORLD
TRAVEL &
TOURISM
COUNCIL

The logo for the World Travel & Tourism Council, featuring a stylized green and blue icon of a person or a location pin above the text 'WORLD TRAVEL & TOURISM COUNCIL'.

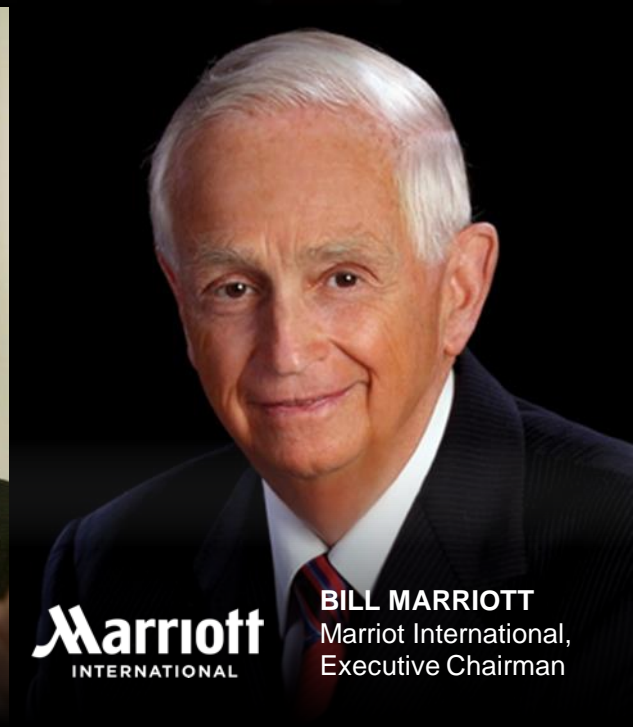
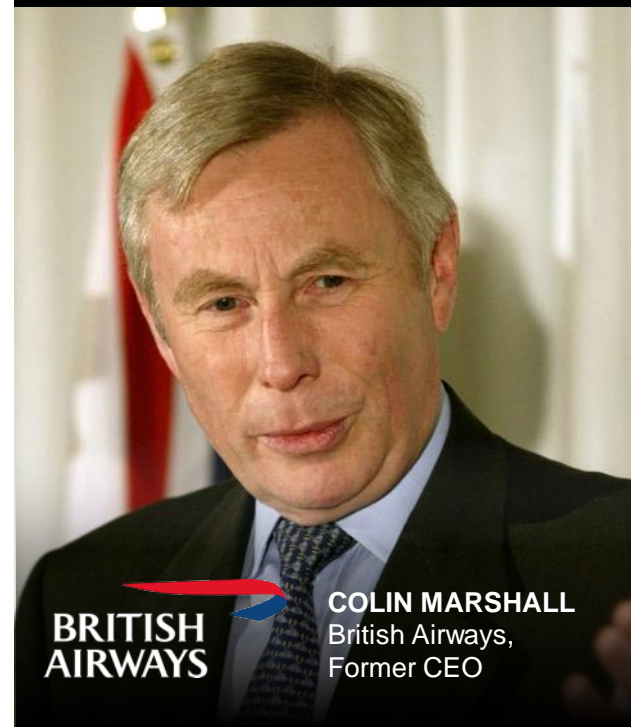
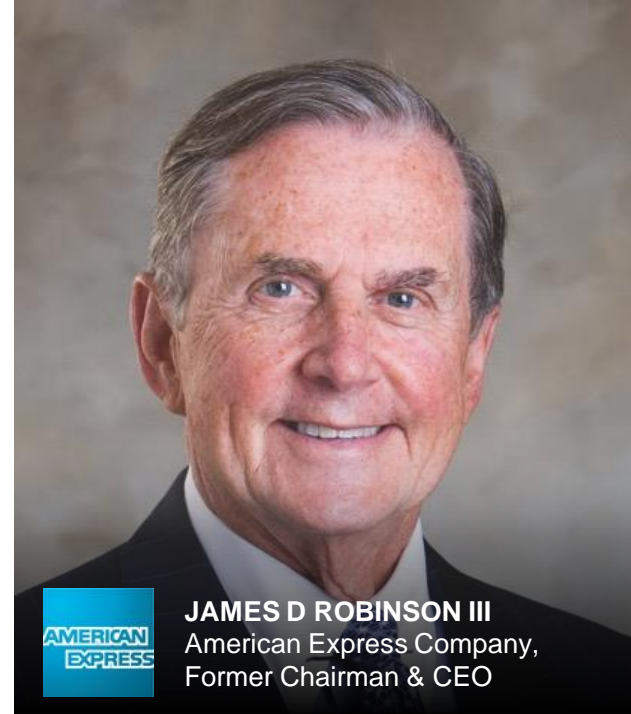
The Authority on World Travel & Tourism

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



The WTTTC Executive Committee

Airports

Airlines

Cruise

Tour operators

Travel companies

OTAs

GDS

Car rental

Hotels

Digital players

Travel services



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President & CEO



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MANDARIN ORIENTAL
James Riley
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VALUE RETAIL
Desirée Bollier
Chair



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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



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



CTRIIP.COM
Jane Jie Sun
CEO



VIRTUOSO
Matthew Upchurch
President & CEO



RELAIS & CHÂTEAUX
Philippe Gombert
President International,
Chairman Of The Board



TURKISH AIRLINES
Bilal Ekşi
Deputy Chairman
& CEO



V&A WATERFRONT
David Green
Chief Executive Officer

Global Performance

Travel & Tourism Economic Impact 2019 (2018 Figures)

3.2%

Global GDP growth

3.9%

Travel & Tourism GDP growth

10.4%

Travel & Tourism total contribution to global GDP

319mn

Jobs supported by Travel & Tourism

1/10

Jobs supported by Travel & Tourism

1/5

of all new jobs created came from Travel & Tourism

28.8%

International Spend

VS

71.2%

Domestic Spend

21.5%

Business Spend

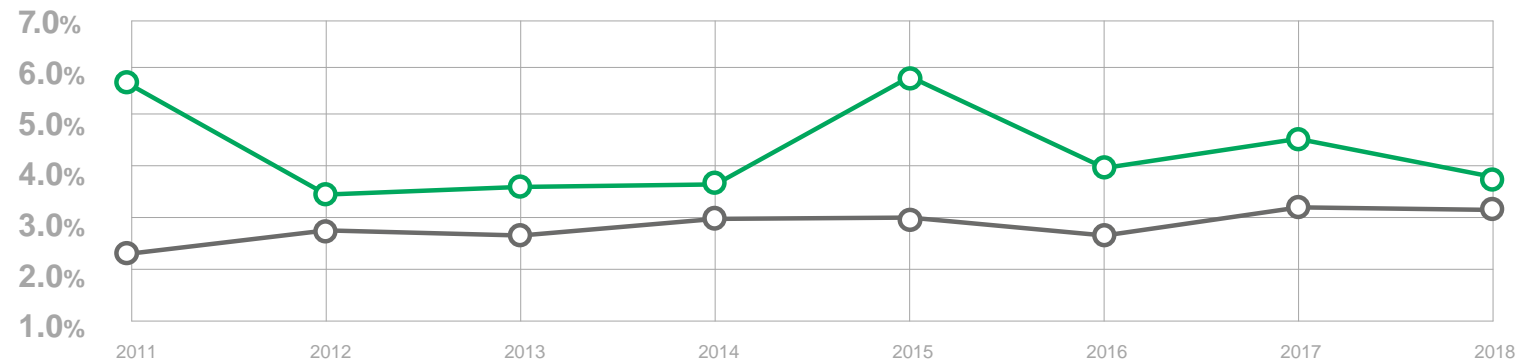
VS

78.5%

Leisure Spend

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

● Global T&T GDP growth (%) ○ Global economy GDP growth (%)





Future Growth

WTTC Economic Impact
Research (2019)

10.4%

1/10

319 mn

1/5

1.4 bn

4.4 bn

11.5%

1/9

421 mn

1/4

1.8 bn

8.2 bn

Travel & Tourism
contribution to global
GDP (WTTC 2029)

Jobs supported by Travel
& Tourism worldwide
(WTTC 2029)

New jobs
(WTTC 2029)

New jobs
(WTTC 2029)

Travellers crossing
international borders
(UNWTO 2030)

Air travellers worldwide
(IATA 2037)

Strategic Framework

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)**

	Government (13)	Government & Private (26)	Private (14)
1:1	<ul style="list-style-type: none"> • Trusted Traveller Programmes (Global Entry / UK Trusted Traveller / EasyPass...) • Seamless Traveller (Australia) • Chain of Trust (Canada) • National ID Cards • D4Fly (Europe) • Smart Departure (Hong Kong) • eGates 	<ul style="list-style-type: none"> • Aruba Happy Flow • Heathrow Airport • Digi Yatra (Bangalore) • FAST (Changi Airport) • Seamless Flow (Netherlands) • Smart Path Australia • Smart Pass (Korea) • KTDI (WEF) • OneID 	<ul style="list-style-type: none"> • FACES (Air Asia) • CLEAR (lounges, security lanes at airports and events) • Biometric Boarding Pass (AF) • Hoteliers (Marriott) • Cruise Lines (Carnival, RCCL, Disney) • Finnair & Finavia
1:N	<ul style="list-style-type: none"> • 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 → 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



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



Government Facilitated	Per Trip	Per Life
<ul style="list-style-type: none"> Centralised Model Government is the service provider Platform leverages data on government databases No need for enrolment 	<ul style="list-style-type: none"> Semi-federated model / per trip Single journey token Facial recognition 	<ul style="list-style-type: none"> Federated model / per life Voluntary enrolment Stored digitally Traveller pushes data to given stakeholder pre-travel Facial recognition

Roles & Responsibilities



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



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).



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

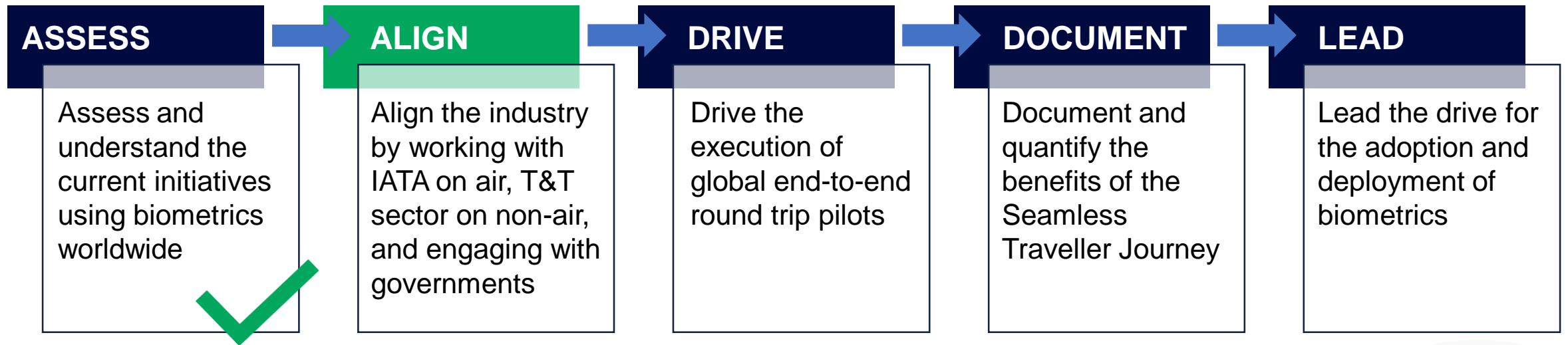


With IATA the NEXTT initiative explores New Experience Travel Technologies for airports



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

Security & Travel Facilitation: **Seamless Traveller Journey** **Next Steps**



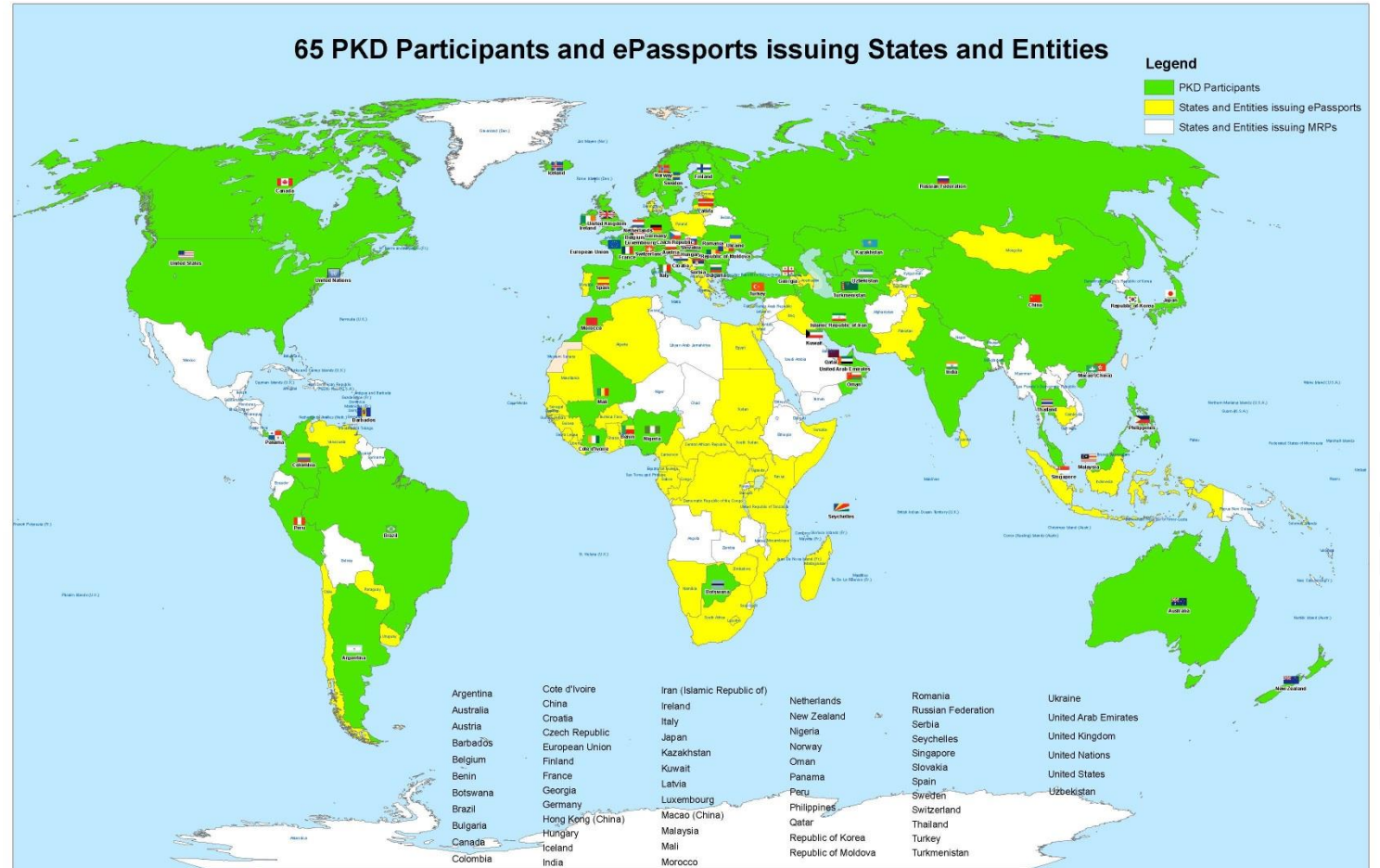
Alignment can only be achieved through a collaborative approach working with governments and border agencies, international organisations and industry associations, travel organisations and other key stakeholders.

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

Contact **Helena Bononi**, Director of Industry Affairs
helena.bononi@wttc.org

Security & Travel Facilitation: **Seamless Traveller Journey** **Your Critical Role**

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
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