



YOU'VE REACHED YOUR DESTINATION

BEST PRACTICES ENABLING THE GROWTH OF TRAVEL & TOURISM

SEPTEMBER 2019

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INTRODUCTION

Travel & Tourism is one of the most dynamic economic sectors in the world, representing 10.4% of global GDP, 1 in 10 jobs on the planet (319 million) and 6.5% of global exports in 2018. What's more, between 1950 and 2018, international travel grew by 5,500% to reach 1.4 billion international arrivals; not to mention the 4-5 billion domestic travellers that are estimated to explore their own countries year. This growth is not expected to waiver over the coming years, with the demand from the rapidly expanding middle classes in emerging and developing economies as the leading driver.

Given its forecast growth and its ability to drive job creation, reduce poverty, foster regional integration and connect people across the world; Travel & Tourism is a unique position to make a difference, providing opportunities for developing and emerging nations to move up the value chain.

Yet, despite the sector's ability to be a force for good, best practices across Travel & Tourism are not readily shared for both the public and private sector, often compelling governments to unnecessarily reinvent the wheel.

In this context, the World Travel & Tourism Council is embarking on a journey to compile quantifiable best practices across Travel & Tourism to equip the sector with a wealth of insights that will in turn enable, both the public and private sector, to learn from the successful experiences of other countries as they develop, review and implement Travel & Tourism related policies.

This initiative is an ongoing effort on the basis of desk research and interviews with government, integrating quantifiable success stories as they become available in an online repository on the WTTC website. In its initial phase, WTTC began exploring policies relating to travel facilitation & security, the prioritisation of the sector and planning for a sustainable & inclusive future. This new edition showcases a number of the 31 policies in our repository, including infrastructure-related policies. Looking ahead, we plan to further expand the repository and explore policies relating workforce, technology, regulation, innovation & entrepreneurship as well as resilience and planning for crisis.

SECURING & FACILITATING TRAVEL

USA

To achieve a more efficient, secure and streamlined process, the US Department of Homeland Security (DHS), through the leadership of the Custom and Border Protection Agency (CBP) successfully shifted from the use of paper-based landing cards (I-94 forms) to electronic ones. The transition, which started in 2013, meant that international travellers no longer had to complete the I-94 landing card; making the traveller's journey more seamless, while creating direct savings for CBP, air and sea carriers.

The shift to an automated process enabled CBP to eliminate duplicative data collection by leveraging information already collected via the Advance Passenger Information System (APIS), the visa process or the Electronic System for Travel Authorization and officer input, such as class of admission and authorisation dates.

To ensure that this transition was widely understood, CBP undertook extensive outreach programmes to inform local, state and other federal government agencies, employers, academic institutions and other benefit granting organisations, as well as the general public. CBP also created an online repository where travellers can retrieve and print their arrival records, access up to five years of travel history to the United States, pay for land border landing cards, and check their admission status.

The automation of the I-94 forms was estimated by CBP to have enabled net savings of a \$15.5 million annually. These benefits result from lower contract cost primarily and some savings in printing, & storage. Freed up personnel time was also redeployed to higher priority activities. CBP estimated the value of traveller time savings in 2013 to reach between \$55 and \$83 million. The total estimated yearly benefits of this shift have been estimated between \$72 million to \$100 million in 2013 and between \$130 million to \$185 million in 2016.

CHINA

A unique gateway transit visa to boost tourism in China has been implemented in select Chinese cities rather than at the national level; enabling foreign travellers transiting through China within 144 hours to reach another country of destination to benefit of the 144-hour Transit Visa Exemption. The Visa exemption is available to citizens of the 53 countries that are eligible for the 72-hour Transit Visa Exemption, however, the number of participating cities is more limited.

The 144-hour Transit Visa Exemption was first introduced to three cities in East China, namely, Hangzhou, Shanghai and Nanjing. As of December 2017, it was expanded to Beijing, Shijiazhuang, Tianjin and Qinhuangdao. Authorities have announced that the visa exemption to South China, specifically to Guangzhou, Jieyang and Shenzhen. It currently includes 18 Chinese cities.

WTTC estimates that travel facilitation policies contributed to the growth in international arrivals from 60.7 million to 62.9 million between 2017 and 2018, which enabled the creation of 410,000 new direct jobs.

With international travel forecast to maintain its growth and reach 1.8 billion international arrivals by 2030, compared to 1.4 billion in 2018; the implementation of policies which secure and facilitate the movement of legitimate travellers is key. While significant progress has been made, the sector not only aims to incrementally enhance the security and experience of its passengers, but also to transform the future of cross-border travel. This section highlights pioneering best practices of nations to ensure secure and seamless travel.

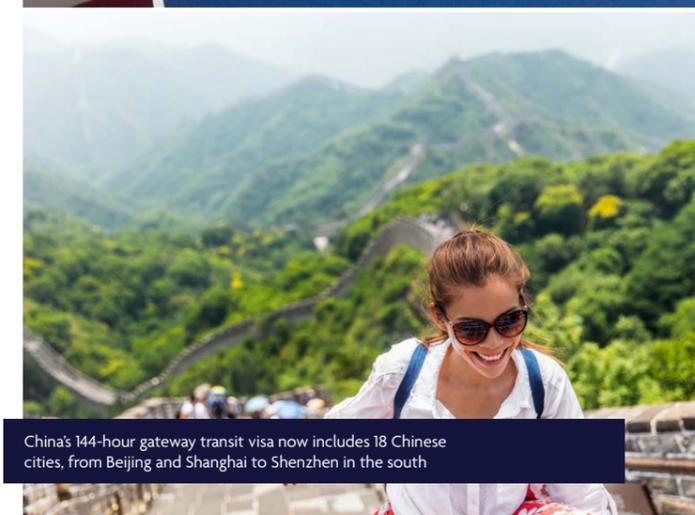
ARUBA

In 2015, a unique and state-of-the-art passenger project, known as Aruba Happy Flow, was initiated in Aruba's Airport. This innovative scheme enables passengers to show their passports only once during their journey through the airport as they travel from Aruba to Amsterdam on KLM. Using facial recognition, passengers can check in, drop off luggage, cross the border and board the aircraft without showing a passport or boarding pass again. Thanks to this process, clearing each checkpoint takes only a matter of seconds. New biometric Passenger Touch Points introduced 'on the move' technology, which feeds the airline agent with timely passenger information.

The initiative was designed to make the passenger process more secure and seamless. It was the result of cooperation between the Dutch and Aruban governments, the Aruba Airport Authority, Schiphol Group and KLM, in collaboration with the technology company, Vision Box. Aruba Happy Flow merged the border control process with the private passenger process at the airport. At present, 70% of passengers use the "Happy Flow", the remaining 30% being ineligible due to age, nationality, etc.



The benefits of the automation of the I-94 forms were estimated between \$130-\$180 million in 2016 alone



China's 144-hour gateway transit visa now includes 18 Chinese cities, from Beijing and Shanghai to Shenzhen in the south



Aruba's Happy Flow is already being used by 70% of passengers travelling through the airport

PRIORITISING THE SECTOR



AUSTRALIA

Tourism Australia, along with state and territory tourism organisations and partners including Citibank, Dell, Ikea, Monster.com, Sony Music, STA Travel and Virgin Australia, launched the Best Jobs in the World global youth campaign in 2013. The campaign built on Tourism Queensland's highly successful 2009 Best Job in the world campaign, giving it scale to promote the whole of Australia.

At the heart of the campaign was a global competition to win one of six extraordinary dream jobs with a state or territory tourism organisation. These included New South Wales' Chief Funster and South Australia's Wildlife Caretaker. The campaign targeted travellers aged 18 to 30 years, living in Australia and overseas, with a particular focus on countries eligible for working holiday visas.

The campaign was rolled out in Canada, France, Germany, Hong Kong, Italy, Japan, Singapore, South Korea, Taiwan, the UK and the US resulting in 620,000 applications from 333,000 individuals in 196 countries, with 46,000 video entries during the six-week campaign. Sixty youth travel operators around the world promoted the campaign through their own distribution networks with STA Travel reporting a significant increase in enquiries and booking.

During the spring of 2013, 18 finalists from 12 different countries were selected and flown to Australia to spend a week undergoing a series of challenges relevant to their "chosen" jobs. The winners were then announced in June 2013.

The campaign resulted in significant publicity with more than 8,500 news articles worldwide generating over \$44 million worth of media coverage. A Tourism Australia survey of nearly 15,000 people who entered the Best Jobs in the World competition revealed that 7 out of 10 participants planned to apply for an Australian working holiday visa, with 4 out of 10 seriously considering taking a working holiday in Australia.

WTTC estimates that policies prioritising the sector contributed to the growth in international arrivals from 6 million to 8.2 million between 2013 and 2016, which enabled the creation of 45,000 new direct jobs.



UNITED KINGDOM

As part of its VisitBritain campaign, the UK made a significant push on domestic tourism by launching its GREAT tourism campaign to encourage visitors to explore the whole of Britain. The campaign builds on themes of British culture and heritage, positioning them in the context of fun and adventure, with the goal of enticing modern travellers to forgo international holidays for domestic ones.

In 2012, the year London hosted the Summer Olympics, Visit Britain launched the Holidays at Home are Great! campaign. This campaign included TV adverts featuring well-known animated characters (Wallace & Gromit). By 2015, the campaign had generated £520.6 million in incremental spend for domestic travel. The campaign encouraged travellers to share their own amazing moments using the hashtag #OMGB (Oh My GREAT Britain). In 2016, the focus evolved into the #OMGB – Home of Amazing Moments campaign, which encouraged interaction with the public, with inspirational images and competitions on the campaign hub.

Between 2012 and 2017, this campaign delivered an incremental domestic spending of over £730 million, with 5.8 million more domestic holidays of 1-3 nights taken in England in 2017 than in 2007; and £11 billion spent on domestic holidays to England in 2017, up 6% on 2016. 1.5 billion domestic day visits contributed more than £50 billion to the English economy in 2017. What's more, according to ABTA research, 66% of Brits are planning to take a break in the UK in 2018.



PLANNING FOR SUSTAINABLE & INCLUSIVE GROWTH



COSTA RICA

Costa Rica has made sustainable tourism part of its DNA, focusing its entire value proposition around the development of sustainable products and services with low environmental impact and a positive impact on the wellbeing of its local communities. The Costa Rican government strives to ensure that its entire offering is aligned with its brand, Essential Costa Rica, showcasing the nation's compelling vision for the future and its commitment to the environment.

Understanding the long-term value of its rich natural resources, Costa Rica has created tourism offerings to enable tourists to discover its unique natural heritage, while making the preservation of natural assets a top priority. In fact, across a 26-year period, Costa Rica has recovered a significant proportion of its forestry, not only stopping deforestation but actively reversing the process. In 2013, 52.4% of Costa Rican territory was forestry compared to just 21% in 1987. The first tropical country to stop deforestation, the forest growth rate in Costa Rica stands at 0.5% per year.

For 'Protected Areas' of Costa Rica that are also tourist areas, management plans are devised assisting destinations in developing environmental standards and planning visitor flow so that overcrowding is avoided.



SLOVENIA

Slovenia embodies the sentiment that if you make a destination more attractive for its residents, then tourists will follow. 46% of Slovenian land is covered with forestry and almost all residential areas are situated within 300 meters of public green space. In 2007, its capital, Ljubljana, created an ecological zone free from motorised vehicles, and in the decade following, pedestrian areas in the city have increased by 620%.

It's not a geographical accident that Slovenia is home to such rich biodiversity, then, but a result of conscientious planning and environmental management. Green taxes are higher than OECD averages, which helps to keep 10% of all territory protected under conservation laws. Meanwhile, efforts are made to keep farming of a low intensity and to improve water and air quality. There is thus a wholesale commitment in Slovenia to sustainability both in terms of ecological stewardship and clean green infrastructure.

INVESTING IN QUALITY INFRASTRUCTURE



SINGAPORE

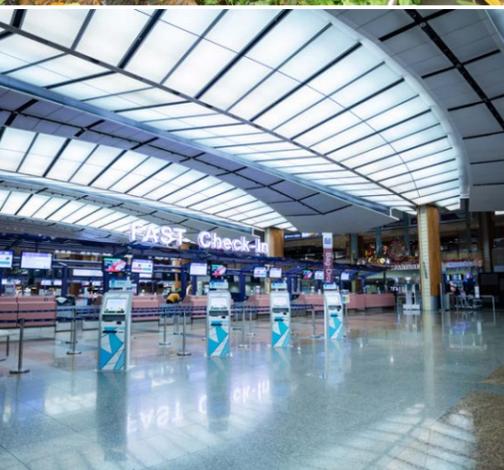
For the seventh year in a row, Singapore's Changi Airport has been rated the top airport in the world by Skytrax. Changi is the 19th largest airport globally, with more than 65.6 million passengers passing through it in 2018. It serves more than 120 airlines, flying to nearly 380 cities in about 100 countries & territories. Changi Airport is an incredible infrastructure project, which is ultimately transforming the experience of travellers, to become an "attraction" in its own right.

With art installations, free cinemas, a butterfly gardens and a rooftop pool & jacuzzi to name a few of its attractions, Changi has redefined travellers' expectations of what an airport can be. Most recently, to augment Changi Airport's position as a leading air hub globally and boost its appeal as a stopover destination for travellers, Changi opened the Jewel in April 2019; which reportedly cost \$1.7 billion to build. The Jewel is a mixed-use development with gardens, attractions, more than 280 stores, dining, a hotel and facilities to support airport operations. The centrepiece of the Jewel is the 40-meter Rain Vortex, the world's tallest indoor waterfall, which is surrounded by lush greenery, mazes and slides.

Changi Airport has also prioritised digitalisation. It has made great strides in creating a seamless travel experience through automated border control kiosks that use CT scanners, in turn eliminating the need to remove electronics from carry-on luggage. It has also implemented technology, such as automated cleaning robots, to enhance cleanliness.

The number of passengers to Changi airport increased by 77% between 2009 and 2018, from 37.2 million to 65.8 million passengers; while international arrivals to Singapore have grown by 95% in the same period from 7.5 million in 2009 to 14.6 million in 2018. This growth is expected to continue in light of the increasing demand for air travel in the Asia-Pacific region over the coming decades. In fact, thanks to its expansions, which have been funded by the government, Changi Airport and passenger fees, Changi Airport's total handling capacity will increase to 85 million passengers per annum; enabling it to manage the forecasted growth.

WTTC estimates that infrastructure policies contributed to the growth in international arrivals from 9.2 million to 14.7 million between 2010 and 2018, which enabled the creation of 60,000 new direct jobs.



The Travel & Tourism sector has grown faster than the global economy for the past eight consecutive years. Sustaining this growth requires investment in quality and enabling infrastructure to build for the future. While an infrastructure gap remains, the following section highlights innovative and fruitful best practices of nations that have taken novel approaches to enhance their infrastructure, in turn facilitating, directly or indirectly, Travel & Tourism growth, while providing outstanding experiences for travellers.



JAPAN

The rise of high-speed rail has been essential in restoring rail travel as a key element of a nation's transportation network; and Japan has led the way for decades. Since Japan debuted the Shinkansen ("bullet train") in 1964, it has expanded across the country, now linking most of the main cities from North to South with trains operating in excess of 250km/h and covering over 3000km through its routes. While the Shinkansen was originally built and operated by the government-owned Japanese National Railways, it has become part of the privatised Japan Railway Group since 1987.

The Shinkansen has carried over 10 billion passengers since its inauguration, transporting a staggering 420,000 travellers on a typical weekday; and has a pristine record for safety and timeliness, with no fatal train derailments or collisions and average delays of just 36 seconds.

Through its highly efficient rail system, Japan has created a sophisticated solution to enable workers to get from one dense city to another. At the same time, it has successfully enticed tourists to use rail to easily access far-flung destinations across the country. While rail travel in Japan can be costly, rail passes are sold at discounted rates for either 7 or 14 days to foreign tourists. What's more, to address the language boundary, Japan has included four languages in its station and onboard signage.

This is particularly noteworthy in light of the exponential growth in international arrivals to Japan over the past decade, increasing by 271%, from 8.4 million in 2008 to 31.2 million in 2018. Of Japan's record 31.2 million international arrivals in 2018, about 57.7% or 18 million foreign travellers ventured outside of the Tokyo, Nagoya and Osaka metropolitan areas and spent 1.8 trillion Yen (\$16.4 billion). International visitors seeking experiences, such as skiing, visiting hot springs, and engaging in nature tourism, have a stronger tendency to go beyond the three traditional metropolitan areas.

Looking to 2020, Japan is aiming to reach 40 million international arrivals. In this context, rail travel has the significant advantage of enabling Japan to continue growing international arrivals while spreading foreign visitors across the country and avoiding overcrowding.





ABOUT WORLD TRAVEL & TOURISM COUNCIL

WTTC promotes sustainable growth for the sector, working with governments and international institutions to create jobs, to drive exports, and to generate prosperity. Council Members are the Chairs, Presidents, and Chief Executives of the world's leading private sector Travel & Tourism businesses.

WTTC works to raise awareness of Travel & Tourism as one of the world's largest industries, supporting over 319 million jobs and generating 10.4% of global GDP in 2018.

To download reports or data, please visit www.wttc.org

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