



YOU'VE REACHED YOUR DESTINATION

BEST PRACTICES ENABLING THE GROWTH OF TRAVEL & TOURISM

JUNE 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. This growth is not expected to waiver over the coming years, with the rapidly expanding middles 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 available 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 will be 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 this initial phase, WTTC began exploring policies relating to travel facilitation & security, the prioritisation of the sector & brand and planning for a sustainable & inclusive future. However, going forward this initiative will expand to explore policies relating to infrastructure, workforce, technology, regulation, innovation & entrepreneurship as well as resilience and planning for crisis.

SECURING & FACILITATING TRAVEL

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.

USA

In April 2018, over 5 million individuals had enrolled in the United States' Global Entry, a 100% increase from FY2015 (2.4 million). Global Entry is the US' flagship Trusted Traveller Program, which provides expedited clearance for pre-approved, low-risk travellers upon arrival in the United States.

In recent years, the program has expanded the eligibility to foreign nationals from more than a dozen participating countries and kiosks available to members at 70 airports worldwide. Effectively, Global Entry streamlines the international arrivals process at airports for 'trusted travellers'. It enables 'Trusted Travellers' to bypass traditional CBP inspection lines and use an automated kiosk to complete their admission to the US. Individual authentication and verification are undertaken through biometric technology, notably, a combination of fingerprint scans, passport check and digital picture authentication.

Global Entry is offered to US Citizens, US lawful permanent residents and citizens of select countries, of select countries, starting with Mexico in November 2011 and now including Argentina, Colombia, Germany, India, the Netherlands, the Republic of Korea, Singapore, Switzerland and the UK.

In June 2018, CBP announced it would be moving towards Global Entry 2.0, making trusted travellers' entry into the US even faster and more secure by utilising facial recognition technology. It is launching a pilot at Orlando International Airport integrating facial recognition into Global Entry Kiosks.

WTTC estimates that the implementation of these policies contributed to the growth in international arrivals from 54.9 million to 79.9 million between 2009 and 2018, which enabled the creation of 294,000 new jobs.

AUSTRALIA

Australia has been at the forefront of "Visas" for decades, launching its Electronic Travel Authority (ETA) as early as 1996 and becoming the first country in the world to launch electronic visas.

In 2017, Australia announced its plan for advanced biometric airport checks across all international airports by 2020. Australia aims to be the first to introduce an entirely automatic, seamless processing system for incoming passengers based solely on their biometric data (fingerprints, iris and facial recognition).

A tender has also been launched for companies to submit technology solutions that will do away with passports completely and replace immigration officers with electronic stations and automatic triage. The aim is to process 90% of all incoming passengers by 2020 solely based on their face, iris and fingerprints.

Australia introduced biometrics at airports in 2012. In 2016, the AUS\$50 million roll-out of SmartGates had been completed, with 83 gates in operation across Australia's eight international airports. Between 2015 & 2016, 10 million passengers had self-processed through the departure SmartGates. The government is now looking to retire the SmartGates and implement a new automated "contactless" border control solution to replace and improve the current process for arriving air travellers. During May and June 2017, the country tested the world's first "contactless" immigration technology at Canberra International Airport. The passport-free facial recognition system confirms a traveller's identity by matching his or her face against stored data.

WTTC estimates that improvements in visa policy led to a 6% uplift in inbound demand, leading to the creation of 15,000 new jobs.

MEXICO

To facilitate and promote Travel & Tourism, the Mexican government made significant developments in its visa policies. Starting in May 2010, the government introduced an extensive of visa waiver to leverage third country visas, notably the US visa (in 2010) and the Schengen visa (in 2011). What's more, new immigration policies enabled US citizens and residents to visit Mexico visa-free and a 24-hour online visa was implemented for Brazil, Russia and China. In 2012, Mexico also granted visa exemptions for nationals of Pacific Alliance countries, notably Chile, Peru and Colombia.

Given the high level of security checks undertaken by the aforementioned countries to obtain a visa, the Mexican government trusts that the approved individuals using these third-party visas are safe to visit Mexico.

The implementation of these policies led to a 1.5 million increase in international arrivals from 143 nations, including a 51.1% increase from Brazil and 85.6% from Russia.

WTTC estimates that these policies contributed to the growth in international arrivals from 23.3 million to 32.1 million between 2010 and 2015 and effectively led to a 17% uplift in inbound demand, which enabled the creation of 190,000 new jobs.



GLOBAL ENTRY
Nom de famille/Apellido

PASSPORT

The US' Global Entry program has expanded the eligibility to more than a dozen participating countries, with kiosks available to its members at 70 airports worldwide




In 2017, Australia tested the world's first "contactless" immigration technology at Canberra International Airport



Mexico was a pioneer in leveraging third-country visas, starting with the US in 2010 and Schengen in 2011

PRIORITISING THE SECTOR

The Travel & Tourism sector is growing globally, both in terms of international arrivals and tourism expenditure, yet nations are still competing for a bigger slice of the pie. While countries around the world are increasingly working to implement enabling Travel & Tourism policies; successful marketing and branding strategies are often needed to complement these and inspire travellers by showcasing the unique value proposition of a destination. This section highlights countries which have taken unique approaches as they designed campaigns to market and brand their destinations.



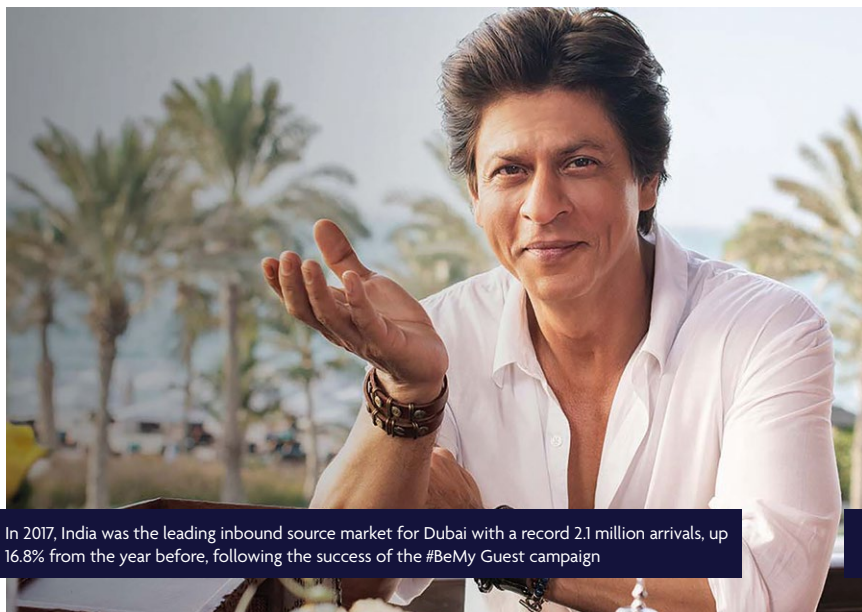
WTTC estimates that policies prioritising the sector contributed to the growth in international arrivals from 14.2 million to 16 million between 2015 and 2018, which enabled the creation of 22,000 new jobs.

DUBAI, UNITED ARAB EMIRATES

As part of its strategy to welcome 20 million international visitors by 2020, Dubai has successfully introduced several targeted destination-focused campaigns that appeal to a pre-identified range of audiences.

In this context, Dubai Tourism developed the award winning #BeMyGuest campaign, which was built on collaborations with celebrity ambassadors to raise awareness of Dubai as a destination. The campaign focused on India, with the goal of strengthening the connection and cultural links between Dubai and the subcontinent.

The Indian campaign featured international superstar Shah Rukh Khan showcasing Dubai's many attractions. Not only does Shah Rukh Khan have international recognition and global appeal, but he also considers Dubai his second home, making him an authentic spokesperson. Within eight weeks of the campaign's launch in India, there were 100 million views. Between December 2016 and May 2017, the #BeMyGuest garnered 45 million views across multiple social media channels and 65 million engagements from around the world. The campaign was so successful, that a second campaign was produced by the famous director Kabir Khan, starring Shah Rukh Khan for a second time in 2018. In 2017, India maintained the top spot as the inbound source market for Dubai, with a record 2.1 million arrivals, up 16.8% from the year before. India became the first country for Dubai to cross the 2 million mark in a single year.



In 2017, India was the leading inbound source market for Dubai with a record 2.1 million arrivals, up 16.8% from the year before, following the success of the #BeMy Guest campaign



Between 2017 and 2018, the Inspired by Iceland campaign generated more than 970 foreign media articles with an estimated value of over £15 million



ICELAND

WTTC estimates that policies prioritising the sector contributed to the growth in international arrivals from 488,622 to 2.4 million between 2010 and 2018, which enabled the creation of 22,000 new jobs.

In 2010, Iceland's government & tourism sector, launched a joint marketing campaign called Inspired by Iceland. The initial goal was to counteract the negative impact of a large-scale volcanic eruption on visitor arrivals. Given the positive results of the campaign, it was decided to use Inspired by Iceland as an umbrella brand for tourism in Iceland.

The objectives are to create awareness of Iceland as a destination all-year round, increase tourism in all regions, provide higher yield per traveller, encourage responsible travel behaviour and maintain a high level of visitor satisfaction, as well as among Icelanders. The Inspired by Iceland campaigns such as Iceland Academy and Icelandic Pledge have driven uplift in consideration and searches for the destination. Between 2017 and 2018, they generated more than 970 articles in foreign media with an estimated media value of over £15 million and more than 25 million video views, with the hardest karaoke song in the world being one of the most popular ones. Since 2012 there has also been 133% uplift in considering off-season travel to Iceland.

Tourism has grown rapidly in recent years, with an average year- on-year growth of over 25% since 2013, peaking in 2016 with 38% growth, most of it off season. In 2017, the growth slowed down to 24% and in 2018 to 5.5%; an indicator for more sustainable growth for the future. In 2017, 65% of tourists visited during autumn, winter and spring combined, while 35% visited during summer. This is a complete reversal since 2011 when over 60% visited in the summer.

PLANNING FOR SUSTAINABLE & INCLUSIVE GROWTH

Given the growing importance of the preservation of natural resources to the Travel & Tourism sector, sustainable tourism has moved out of the margins and into the mainstream of travel policy and practice. As consumers demand more responsible trips, both the public and private sectors have responded with wildlife protection programs, the installation of public green zones, and policies to spread tourists across sites and seasons. The following section hones in on those nations that are excelling in managing sustainable and inclusive growth to ensure that destinations are enriched, and not harmed, by Travel & Tourism.



MALAYSIA

Malaysia's Homestay Experience Programme was launched in 1995 to create economic opportunities for rural communities to participate and benefit from the tourism sector. The programme has boosted household incomes, created jobs and improved living standards, while offering tourists the opportunity to have a unique experience.

Malaysia's success has been enabled by strong partnerships with NGOs & travel operators, the forming of the Cooperative, focusing on unique selling points, whilst being community driven. Capacity building initiatives were also established to offer training to homestay operators.

The Programme led to a significant rise in household income for participating communities. In 2018, the 212 homestay clusters were registered comprising 4,070 houses with over 5,712 rooms. The total number of tourists visiting homestays increased from 91,533 in 2008 to 372,475 in 2018 and total receipts increased from \$1.6 million in 2008 to \$6.8 million in 2018.



SOUTH AFRICA

Cape Town's 'Day Zero' campaign effectively communicated to its 400,000 residents the severity of the drought crisis that the city inched towards in 2017 and articulated the need to reduce water consumption to avoid such a crisis. Restrictions of 50 litres of water per person per day were advised. At the same time, the private sector put in place measures such as replacing soap with sanitisers, installing waterless urinals, removing bath plugs, and steaming vegetables rather than boiling them. Complementing this, the South African government fixed leaks free of charge. In September 2018, dam levels hit 70% for the first time since 2015 and restrictions relaxed to 70 litres per person per day.

This multi-stakeholder effort to cut consumption of water by 60% over three years, is a feat that no other city has managed to achieve. While lessons are to be learnt on the use of scare tactics and their effect on the destination as a tourist spot, this case demonstrates a wholesale change of behaviour that transformed the city from being on the brink of crisis to being considered a water-wise city and best practice leader.

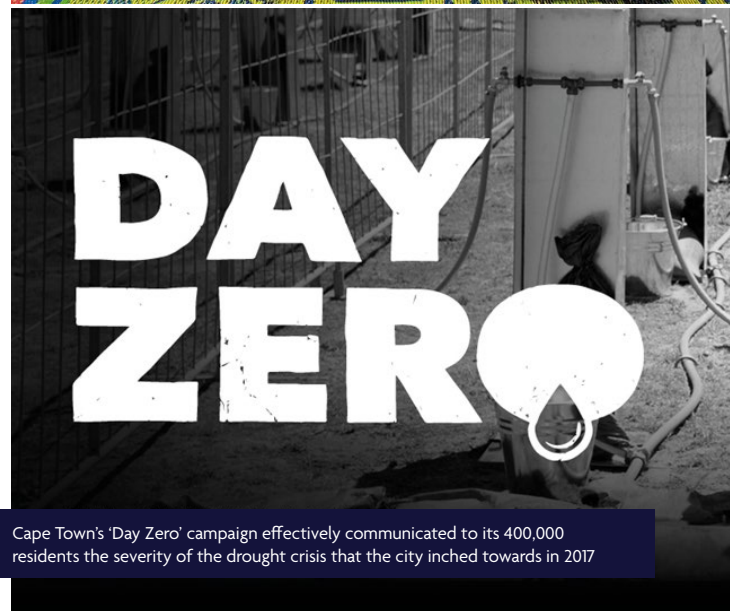
PALAU

Palau was the first country to embed environmental protection into their immigration laws. The country requires all visitors to sign a pledge in their passport that they will abide by comprehensive guidelines to respect the ecology of the islands. The pledge includes commitments to protect coral, leave marine life souvenirs in their natural space, support local business and respect traditional customs. Access is thus only permitted to visitors upon the signing of these pledges, making environmental conservation a legal condition of entry with fines of up to \$1 million for violations.

Since its implementation in 2017 over 158,000 pledges have been taken, with plans for two million tourists to sign up to the commitments over the next decade. This system has introduced tourist self-policing to a vulnerable destination whereby annual tourist arrivals outnumber the local population eight-fold.



Malaysia's Homestay Experience Programme saw an increase in total receipts from \$1.6 million in 2008 to \$6.8 million in 2018



Cape Town's 'Day Zero' campaign effectively communicated to its 400,000 residents the severity of the drought crisis that the city inched towards in 2017



Palau became the first country to make environmental conservation a legal condition of entry with fines of up to \$1 million for violations

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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

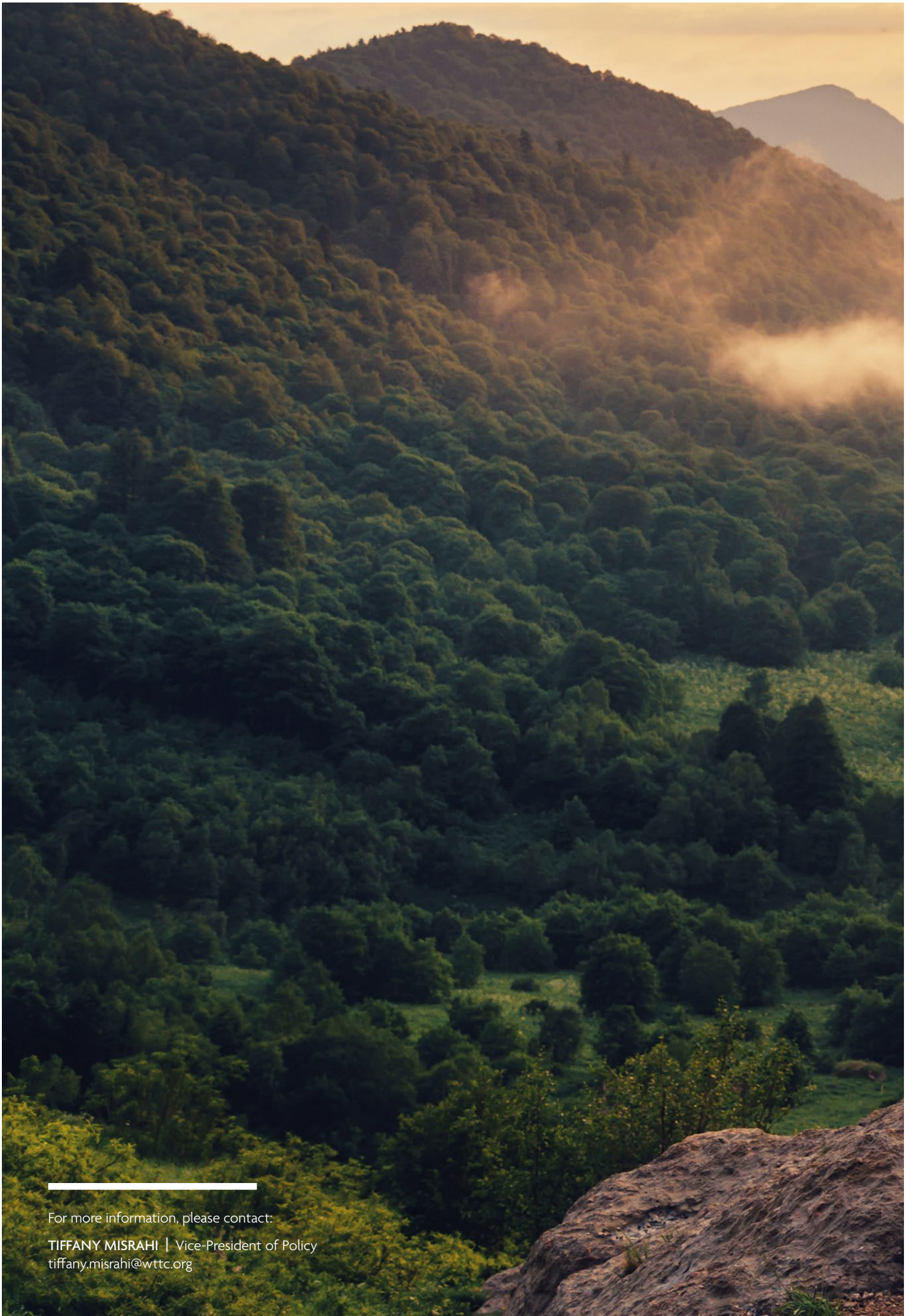
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