



WTTC SAFE & SEAMLESS TRAVELLER JOURNEY: OVERVIEW

INTRODUCTION

WTTC's annual research shows the Travel & Tourism sector experienced 3.5% growth in 2019, outpacing that of the global economy (2.5%) for the ninth consecutive year. Travel & Tourism's direct, indirect, and induced impact accounted for 10.3% of the global GDP (US\$8.9 trillion) and 1 in 10 jobs worldwide (330 million jobs).

With the COVID-19 crisis, the Travel & Tourism sector is in uncharted territory and is uniquely exposed. The research from WTTC June 2020 projects 121 million job losses and reveals a projected Travel & Tourism GDP loss of US\$3,435 billion in 2020.



To support the recovery of the Travel & Tourism sector, WTTC is advocating for swift action and enabling strong policies through the undertaking of several activities. A core initiative is the WTTC's Safe & Seamless Traveller Journey (SSTJ) which aims to enable a seamless, safe and secure end-to-end traveller journey, encompassing both air and non-air travel, through an approach for systematic biometric verified identification at each stage of the journey replacing manual verifications. The SSTJ initiative allows for a more secure and safe environment for travellers and employees, by creating a touchless environment through advances in technology.

Significant technological advances in digital identities continue to enter the marketplace and can help overcome the COVID-19 crisis. Contactless technologies, biometrics, faster clearance for both inbound and outbound passengers, offsite processing, are a few examples of SSTJ capabilities, all of which help reduce the risk of pathogen transmission.

The SSTJ initiative brings together public and private sector stakeholders with technology providers to design models to facilitate a seamless travel experience. The programme advocates for a globally aligned approach in the implementation of biometrics and complimentary systems within the travel sector. Much work has already been done to drive interoperability, biometrics and touchless capabilities to the traveller journey and this initiative has become even more important given the current pandemic.

WTTC conducted an economic analysis in partnership with Atkins to identify the potential costs and benefits associated with the SSTJ concept over the next 30 years. When combining the financial model for aviation with the non-air, the two models' 30-year forecasts suggest a combined NPV of \$967 billion across the travel sector. The NPV within aviation calculated was calculated at nearly two-thirds of the total at \$618 billion compared to the \$349 billion NPV across car, hotel and cruise sectors for SSTJ adoption.

A solution can only be achieved by working collaboratively across national boundaries and in partnership between private companies and governments. Please visit: wttc.org/Initiatives/Security-Travel-Facilitation

ABOUT THE WORLD TRAVEL & TOURISM COUNCIL

WTTC is the body which represents the Travel & Tourism private sector globally. Members consist of CEO's of the world's Travel & Tourism companies, destinations, and industry organizations engaging with Travel & Tourism.

WTTC has a history of 30 years of research to quantify the economic impact of the sector in 185 countries. Travel & Tourism is a key driver for investment and economic growth globally.

WTTC is the voice of the industry globally, Members are the Chairs, Presidents and Chief Executives of the world's leading private sector & tourism businesses, who bring specialist knowledge to guide government policy and decision-making and raise awareness of the importance of the sector.

Please visit wttc.org for more.

THE SAFE & SEAMLESS TRAVELLER JOURNEY (SSTJ)

Security and Travel Facilitation is a priority for WTTTC not only to enable the sustainable growth of the Travel & Tourism sector and enhance security, but also to offer an unparalleled experience to the traveller. WTTTC is addressing this opportunity through its SSTJ Programme, and has taken a collaborative approach, building on the efforts underway with organizations including IATA, IBMATA, ICAO, ACI, CLIA and the WEF as well as independent efforts by airlines, airports, hotels, car rentals and governments.

As the representative body for the global Travel & Tourism private sector, including all industries and geographies, with more than 200 leading companies in the world as Members, WTTTC is in a unique position to establish a unified voice to engage with governments around the world. WTTTC brought together more than 250 travel industry, technology, and government leaders in a series of workshops to drive forward this initiative. Efforts have been focused on understanding, documenting, and finding solutions across the sector to implement biometrics and other processes and technologies to facilitate seamless travel.

From a traveller's perspective, this vision is exemplified by a journey during which the traveller no longer needs to present travel documents and boarding passes multiple times to a variety of stakeholders at different stages of their journey. Rather, travellers will be able to book transportation, check in, proceed through security, cross borders, board their aircraft, collect luggage, rent a car, check in and out of their hotel and other non-air services, and access myriad destination services, simply by confirming their identity and booking data.

Such a solution aligns with WTTTC consumer research undertaken in five European countries and in the United States, suggesting that, on average, 4 in 5 international & domestic travellers would be willing to share their photographs in advance of travel to speed up their journey. By capturing and uploading biometric and biographic data prior to travel, border and security agencies will be able to authenticate and pre-clear travellers in advance of arrival, thus reducing cumbersome checks and queues at ports and airports. This will in turn enhance security across the whole system, relieve pressure on infrastructure & capacity constraints and improve the traveller experience.

As a proof of concept, WTTTC partnered with the Government of Aruba to develop a touchless end-to-end solution that leverages biometrics. Phase one of the Aruba Happy Flow program enabled a touchless journey through the Aruba airport. Phase two of the program, which is currently in development, will expand that touchless journey to include arrival, car rental and hotel check in.

Additionally, WTTTC recently released global guidelines for testing, tracing, receipt of a traveller test/vaccine certificate as part of the Traveller Journey for governments which deem it necessary to implement testing and tracing.

BENEFITS OF SSTJ

Beyond infrastructure, there are ample benefits to the public sector, private sector and the traveller, in addition to the fact that touchless biometrics and contactless passage through security, border control and boarding offer airports hygienic advantages that mitigate the risk of pathogen transmission.

Public sector:

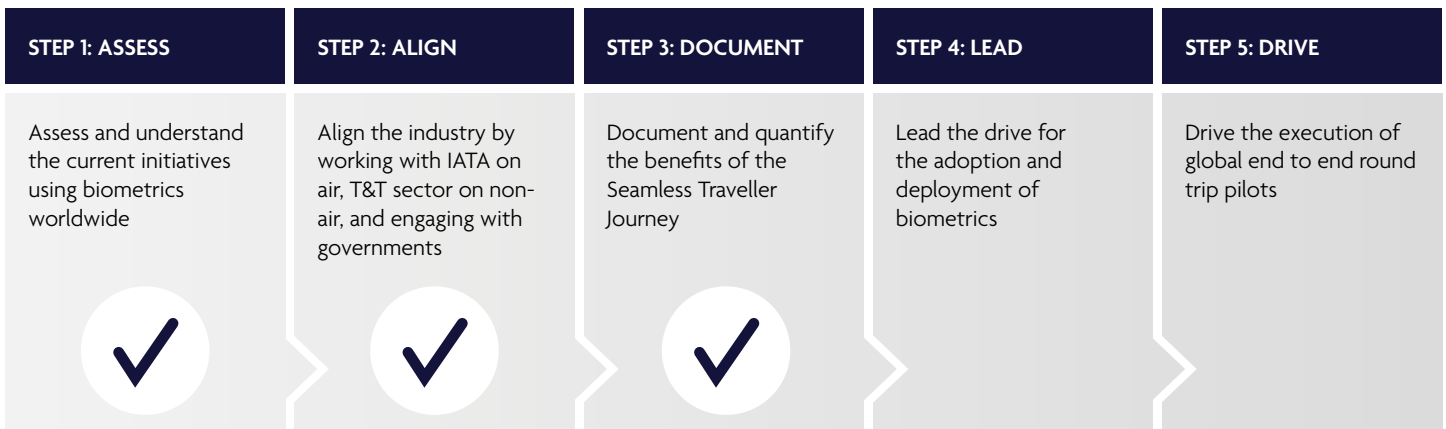
Governments increase their border security while reducing the cost of border crossing operations

Private sector:

Companies will increase their security while reducing the demand on infrastructure and resources while improving the customer experience

Traveller:

Travellers will be able to book travel, check-in (e.g. airport, hotel, cruise, etc.), proceed through security, cross borders, board aircraft, collect luggage, rent and retrieve cars, and other non-air services, simply using their verified identity by confirming their biometrics



LESSONS LEARNED

- 1 To better understand the “biometrics” landscape, WTTC undertook a mapping of existing biometric initiatives around the world, resulting in the identification of over 80 initiatives.** While there have been significant benefits realised in each program, overwhelmingly these solutions have been siloed. Limited interoperability across today’s solutions present the critical need for global best practices to govern information storage, exchange, and partnership across organizations for future state solutions.
- 2 On this basis and realising that there is no “one size fits all”, WTTC has developed an updated perspective on potential end-to-end models and processes to support its vision of an end-to-end Seamless Traveller Journey.** WTTC’s research, undertaken in collaboration with Oliver Wyman, characterises three aviation focused models: the “Government” model, the “Per Trip” model and the “Per Life” Model. Each of these models have demonstrated applicability and implementation success, bringing together the insights and experience of existing pilots within the air-ecosystem, and offer opportunities to scale across non-air segments of the traveller journey.
- 3 With COVID-19, increasing health and safety across the travel ecosystem brought two critical needs:** First, a touchless experience across all journey checkpoints points. Second, the ability to share traveler information (such as identity, health, and travel history) in a secure manner with government agencies and travel providers. Both could be achieved with a biometrically enabled “trusted traveler” digital identity profile.
- 4 Traveler information has become increasingly digital over time** – from bookings to boarding passes. The traveler digital profile would be the final step: a fully digital form of any paper information travelers still carry, such as personal identification, rounded out with additional information now vital in a post-COVID-19 world, such as health and travel history. To ensure global usability, it will be critical that all of the information in the digital profile can be internationally recognized. To establish international trust in the digital profile, data must be securely linked to the traveler’s identity using biometrics and must originate from trusted, government-authorized sources.

ENHANCING GLOBAL STANDARDS

International travel relies on multilateral, consensus-driven standards to create and maintain trust between countries. These standards ensure that countries can maintain their security while facilitating the movement of travelers. For the foreseeable future, additional health protocols will need to be included, but any updating of standards must ensure that travelers will enjoy a safe and seamless experience.

To enable touchless travel globally, each component of the traveler digital identity will rely on these standards. It is important to point out the significant work that has been done to date, such as the International Civil Aviation Organization’s passport digitalization and the International Air Transport Association’s “One ID” concept, enabling a digital, touchless experience for air passengers. These programs should be leveraged to rapidly develop interoperability for new components of the traveler digital profile, such as a health certificate and travel history.

Global standards that enable a safe and seamless journey play a particularly critical role for small countries whose economies rely on the travel and tourism sector. These countries typically do not have a stake in standards definition, but are dependent on them to keep their countries, citizens, and guests safe in a COVID-19 world.

NEXT STEPS & WHAT YOU CAN DO

There are a number of steps that governments, industry associations, standard-setting bodies, and travel providers will need to take. Requirements (technical, privacy, data, etc.) for the health certificate and travel history components of the digital traveler profile must be defined, in partnership with industry experts outside of travel.

International standard-setting bodies, such as the World Health Organization, will need to develop standards for a digital health certificate. Similarly, globally recognized digital travel history standards will require definition by ICAO.

Travel providers will need to execute two critical pieces of work: One will be to provide input into the development of standards, to ensure that they are workable for the industry. The second will be to develop their own biometric digital identity strategies, fully endorsed by their organizations. These strategies must be customer-centric, while considering shifting post-COVID-19 government requirements.

Travel recovery plans are already underway, with WTTC launching industry guidance and protocols. The industry has a shared goal – to make the touchless traveler journey a reality.

CONTACT

To learn more and engage with WTTC on the Seamless Traveller Journey, please contact:

HELENA BONONI
VP Commercial & Membership
Helena.bononi@wttc.org

