

Uniting the Global Travel Industry and rebuilding Traveler Confidence

Adolfo Reyes
Associates Manager



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WTTC Membership

- 200 Members (CEOs and Chairs)
- All geographies
- All industries in Travel & Tourism



The WTTC Executive Committee

Airports

Airlines

Cruise

Destinations

Tour Operators

Travel Companies

OTAs

GDS

Car Rental

Hotels

Digital Players

Travel Services



HILTON
Christopher J. Nassetta
President & CEO



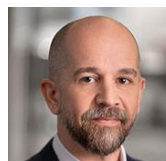
CARNIVAL CORPORATION
Arnold Donald
President & CEO



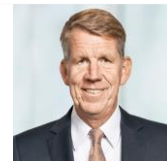
UNITED AIRLINES
Oscar Munoz
CEO



GREATER TORONTO AIRPORTS AUTHORITY
Deborah Flint
President & CEO



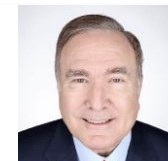
INTERNOVA TRAVEL GROUP
J.D. O'Hara
CEO



TUI GROUP
Friedrich Joussem
CEO



MSC CRUISES
Pierfrancesco Vago
Executive Chairman



ROYAL CARIBBEAN CRUISES
Richard D. Fain
President & CEO



MARRIOTT
Arne Sorenson
President & CEO



SABRE
Sean Menke
President & CEO



INGLE INTERNATIONAL
Robin Ingle
Chairman & CEO



DUBAI AIRPORTS
Paul Griffith
CEO



EMIRATES GROUP
Gary Chapman
President, Group Services



Japan Airlines
Yuji Akasaka
Representative Director, Executive President



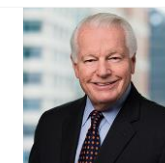
TRIP.COM GROUP
Jane Jie Sun
CEO



VIRTUOSO
Matthew Upchurch
President & CEO



CARLSON WAGONLIT TRAVEL
Kurt Ekert
President & CEO



US TRAVEL ASSOCIATION
Roger Dow
President and CEO

Associates Snapshot



 <p>AFEET[®]</p>	 <p>ALCHEMIA In the business of transformation</p>	 <p>ANITA MENDIRATTA & ASSOCIATES</p>	 <p>ARCHAEOLOGICAL PATHS</p>	 <p>THE BRIGHTER GROUP</p>	 <p>dci CELEBRATING 60 YEARS</p>	 <p>ECO HOTELS & RESORTS</p>	 <p>enthuse</p>	 <p>EON</p>
 <p>geotourist</p>	 <p>intas destinations</p>	 <p>JIM JIM INNOVATIONS</p>	 <p>LIFT</p>	 <p>Links Rez Linking You to the World</p>	 <p>MABRIAN</p>	 <p>NAAT Extend your Wings</p>	 <p>SA</p>	 <p>SKYVIEW PATNITOP by EMPYREAN</p>
 <p>solvera</p>	 <p>SUSTENTUR TURISMO RESPONSABLE</p>	 <p>THE CABO AGENCY Your Mexico Connection</p>	 <p>tiao TOURISM INDUSTRY ASSOCIATION OF ONTARIO</p>	 <p>TIA YUKON TOURISM INDUSTRY ASSOCIATION OF THE YUKON</p>	 <p>Vacayou</p>	 <p>Viajes LE GRAND</p>		

Global Performance

Travel & Tourism Economic Impact 2020 (2019 Figures)



2.5%
Global GDP growth

3.5%
Travel & Tourism GDP growth

10.3%
Travel & Tourism total contribution to global GDP

330 mn
Jobs supported by Travel & Tourism

1/10
Jobs supported by Travel & Tourism

1/4
of all new jobs created came from Travel & Tourism

28.7%
International Spend

VS

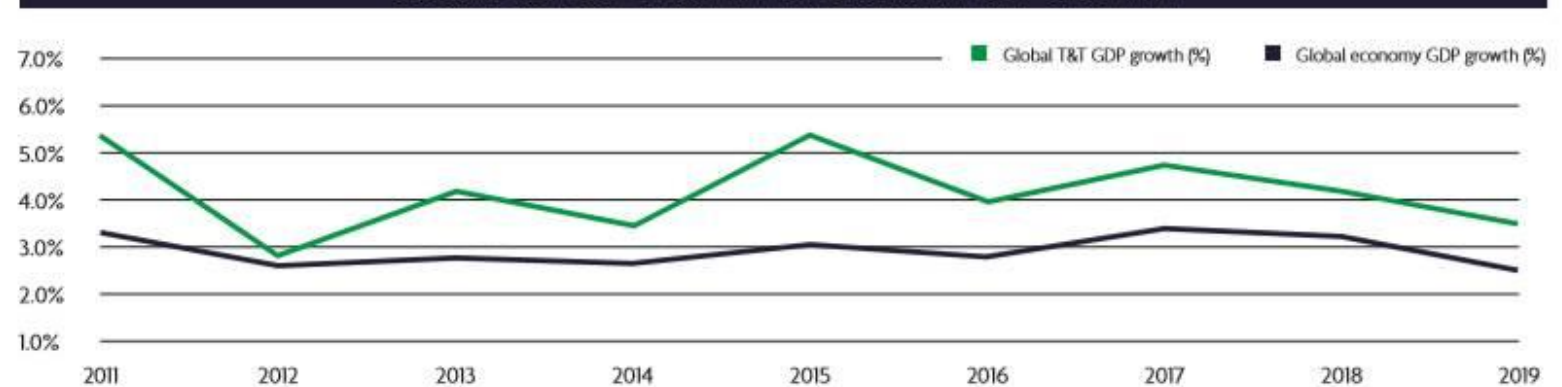
71.3%
Domestic Spend

21.4%
Business Spend

VS

78.6%
Leisure Spend

GLOBAL T&T GDP GROWTH VS. ECONOMY GDP GROWTH



Source: WTTC EIR 2019 Data

USA

2020 Annual Research Key Highlights



Contribution of Travel & Tourism to GDP:

8.6% of Total
Economy

Total T&T GDP = USD 1,839.0 BN

+2.3%

2019 Travel & Tourism GDP growth
vs. +2.3 % real economy GDP growth



Contribution of Travel &
Tourism to Employment

16,826.5

Jobs (000's)
(10.7 % of total employment)



International
Visitor Impact

USD 195.1 BN

in visitor spend (7.8 % of total exports)

North America

Economic Impact from COVID-19

BASELINE SCENARIO

 **Travel & Tourism Jobs:**
11.4 MILLION job losses ↓ **44%**


 **Travel & Tourism GDP:**
\$955 BILLION loss ↓ **45%**

 **Global Visitor Arrivals:**
 International ↓ **59%** Domestic ↓ **40%**

DOWNSIDE SCENARIO

 **Travel & Tourism Jobs:**
18.2 MILLION job losses ↓ **71%**

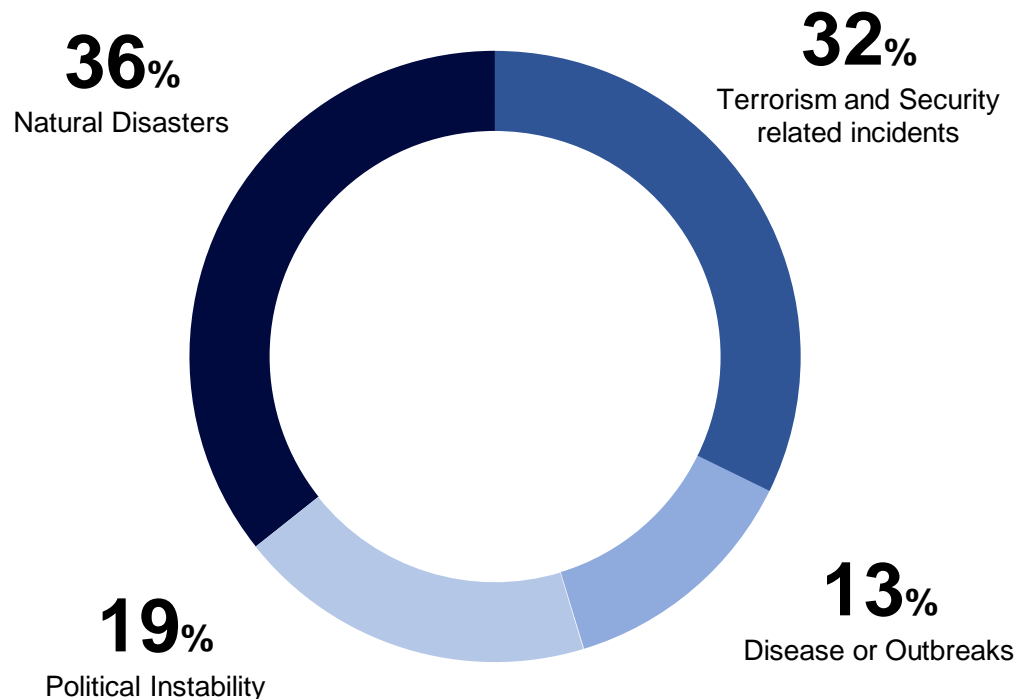
 **Travel & Tourism GDP:**
\$1,520 BILLION loss ↓ **71%**

 **Global Visitor Arrivals:**
 International ↓ **73%** Domestic ↓ **69%**

We need to learn from the past ...

90 Crises

(2001-2018)



WE NEED TO LEARN FROM THE PAST...

- Do not try to reinvent or create new travel processes
- Avoid creative solutions in silos and local standards
- Learn from people involved in outbreak response (Hotel rooms – COVID-free)

→ 9/11 – very slow processes and impact in recovery

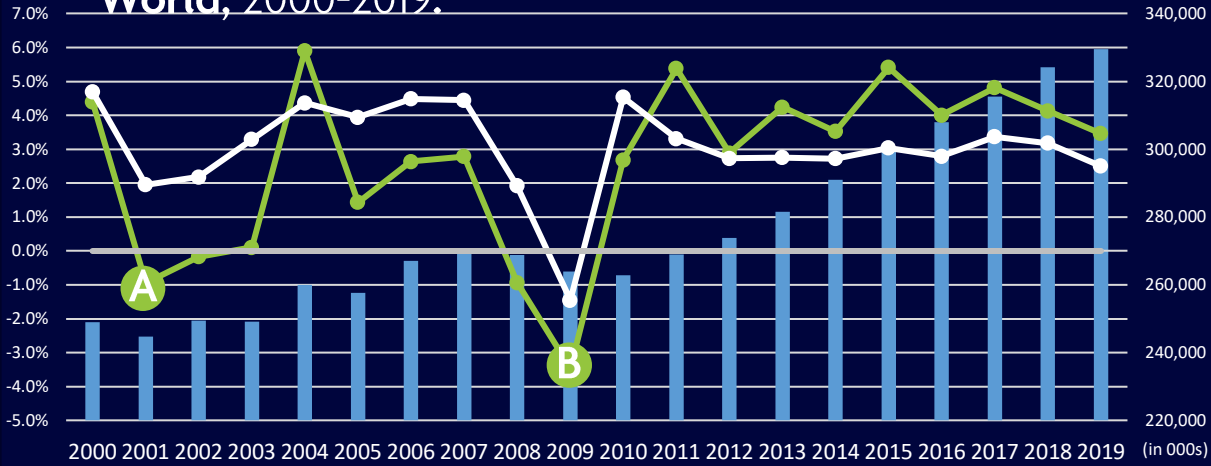
→ 2008 -- coordinated approach via G20 (Private-Public)

TO RECOVER FASTER ...

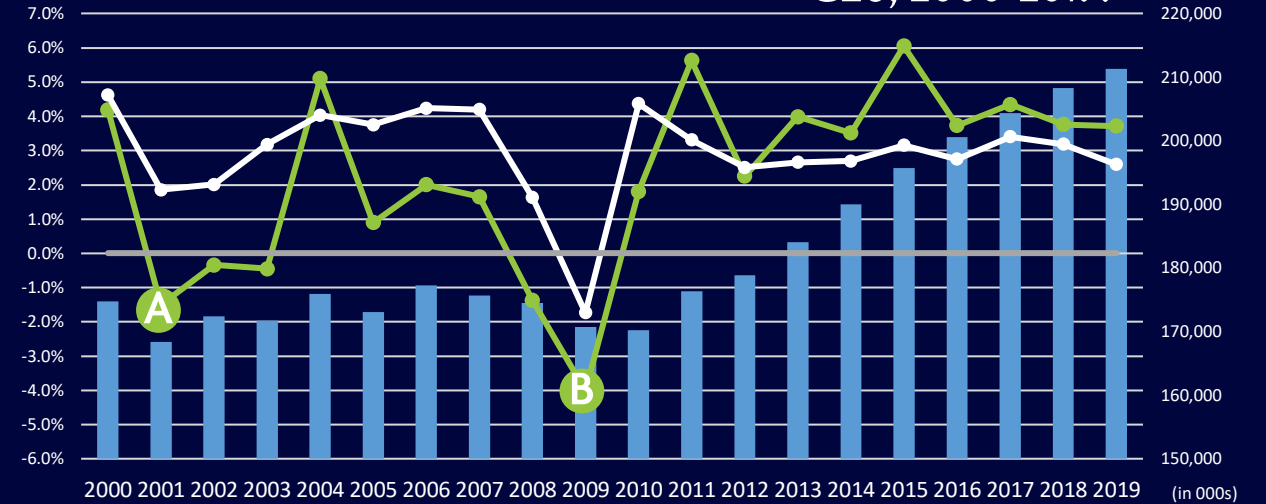
- Essential public and private **COLLABORATION**
- Enhance current **SEAMLESS TRAVEL EXPERIENCE**
- Embrace **GLOBAL STANDARDS & PROTOCOLS** to ensure re-building trust of the travellers
- Embrace new **TECHNOLOGIES** to allow contact tracing & testing in coordination with sector standards.

Past Economic Recovery

World, 2000-2019:



G20, 2000-2019:



— T&T employment (000s)

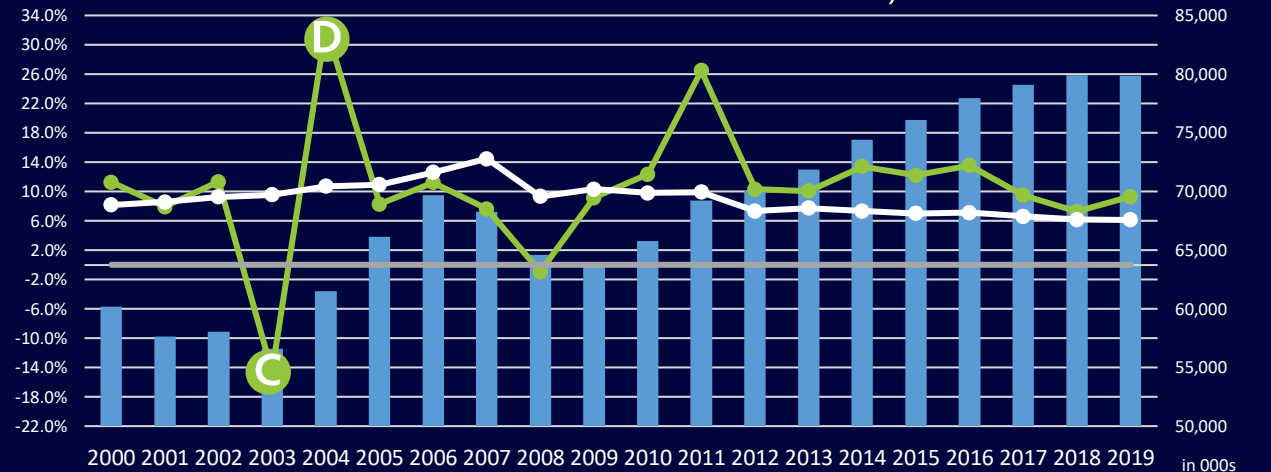
— T&T GDP growth (%)

— Economy GDP growth

KEY EVENTS:

- A** 9/11
- B** Global financial crisis
- C** SARS
- D** SARS recovery

China, 2000-2019



Four Principles for Recovery

1) A coordinated international approach to re-establish effective operations:

- **Reopen Borders** – In an international coordinated way between public & private sector and other countries. Possible ‘air corridors’ to countries with similar circumstances (Medical, Political & Tourism)
- **Remove Barriers** – Eliminate travel advisories and bans on non-essential international travel. Replace country wide 14 days quarantine measures with selective quarantines of positive cases. Internationally agreed framework of comprehensive testing and tracing programmes (acceptance and basic exchange data for tracing)

2) Enhance existing Seamless Traveller journey experience by adding health components and use of technology,

- **Before the Vaccine:** Invest in extensive, rapid (less than one hour), reliable (97%+) and low cost (less than 15 USD) tests to apply before departure (symptomatic and asymptomatic). Agreement of international framework for testing (type, process of application, timeframe)
- **After the Vaccine:** integrate a possible digital health stamp to the traveler information before the trip begins

3) Adoption of global health, hygiene & safety protocols and common standards - Provide consistency, reduce risk and build traveler confidence that it is safe to travel again. Standard policies should be adopted (e.g. like where, how and how long to wear the mask)

4) Continued government support for the sector in terms of fiscal, liquidity incentives, protect workers and invest promotion.

Protocols & Safe Travels Stamp



WTTC alongside our Members, governments, health experts (WHO and CDC guidelines) and other industry associations worked together to develop effective recovery protocols to optimise sector-wide recovery efforts

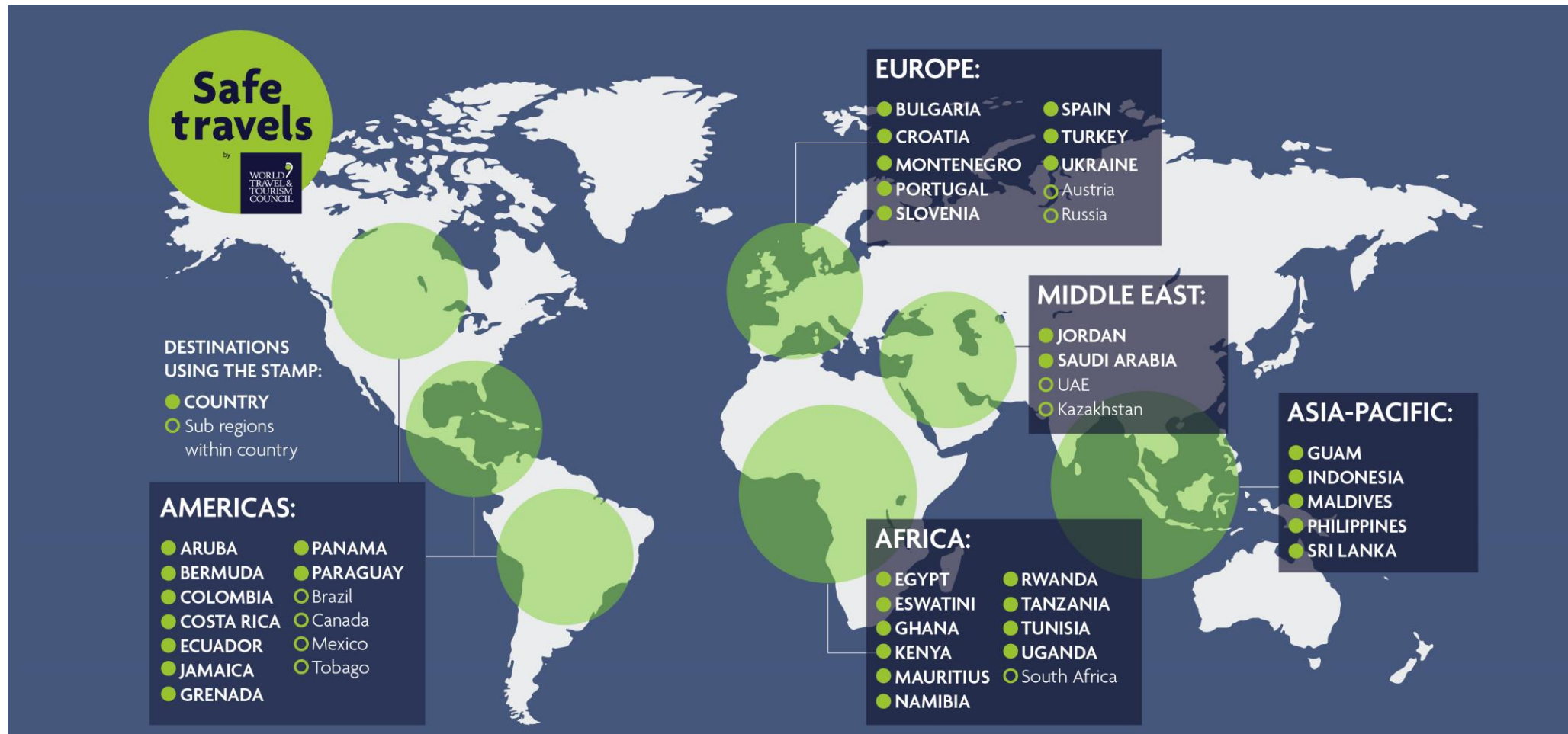
- Designed to rebuild confidence among consumers & ensure alignment of private sector
- Protocols covering all travel verticals



Safe Travels Stamp



112 destinations have received the Safe Travels Stamp with more 90 destinations in the pipeline



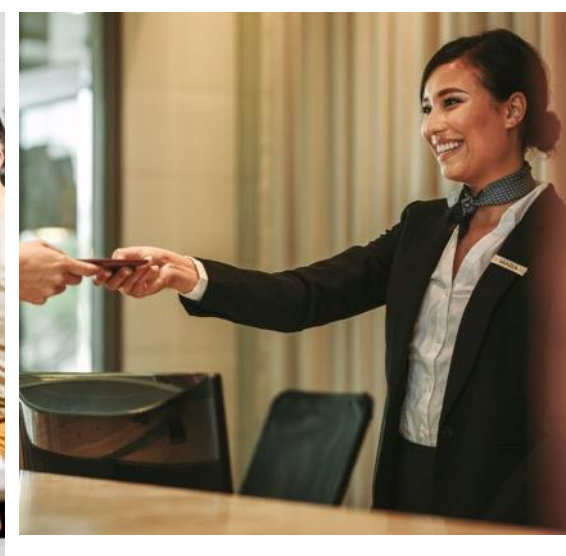
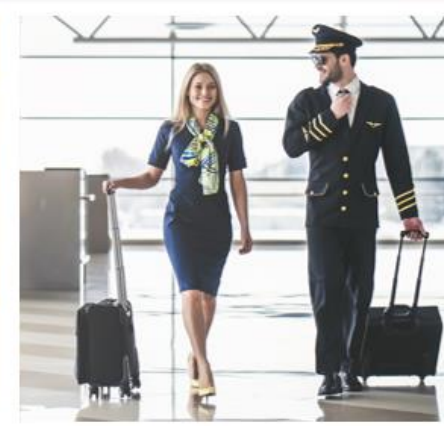
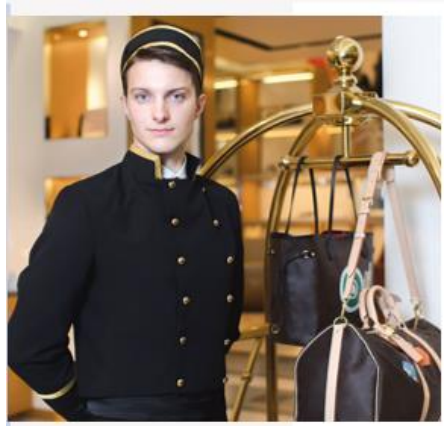


Unique opportunity to overcome the situation together

- **Timing is crucial**
- **Mutual Priorities:**
 - Avoid exporting or importing the virus – Public Health
 - Reduce impact of millions of livelihoods around the world
 - Avoid a painful and long recovery
 - Science and data-based decisions
 - Reduce significant social impact
- **Travel and Tourism part of the solution like in past crises.**

G20 Tourism

- Millions of jobs and livelihoods have been impacted
- Saudi Arabia requested WTTC and private sector - 100 million job recovery plan



100 million job recovery plan

- 12 commitments from the private sector
- Support needed from the governments
 - **A coordinated approach to re-open borders** and the consideration of international standard reporting and indicators on risk assessments and the current situation to provide clarity on information
 - **Implement an international testing protocol** and a coordinated framework for testing before departure using fast, efficient and affordable tests.
 - **Modify quarantine measures to be for positive tests only:** Replace blanket quarantines for a more targeted and effective approach, significantly reducing the negative impact on jobs and the economy.



Thank you

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