



Tourism PPPs: Trends, Models and Implementation Areas

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COMCEC

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MISSION

“To maximise the sustainable growth of the industry by informing governments and wider society of the enormous economic and social benefit that Travel & Tourism brings to the world community”

MEMBERSHIP DIVERSITY

100 of the world's leading companies in Travel & Tourism



FREEDOM TO TRAVEL



- The Impact of Visa Facilitation on Job Creation in the G20 Economies
- The Impact of Visa Facilitation on Job Creation in the APEC Economies
- The Impact of Visa Facilitation in ASEAN Member States
- WEF Smart Travel White Paper

POLICIES FOR GROWTH

- Travel & Trade Linkages
- Benchmark Study on Industry Comparisons
- Tax Burden on the US Travel & Tourism sector
- Air Passenger Duty Impact Assessment
- Business Travel Research
- **Travel & Tourism Investment in the Americas**

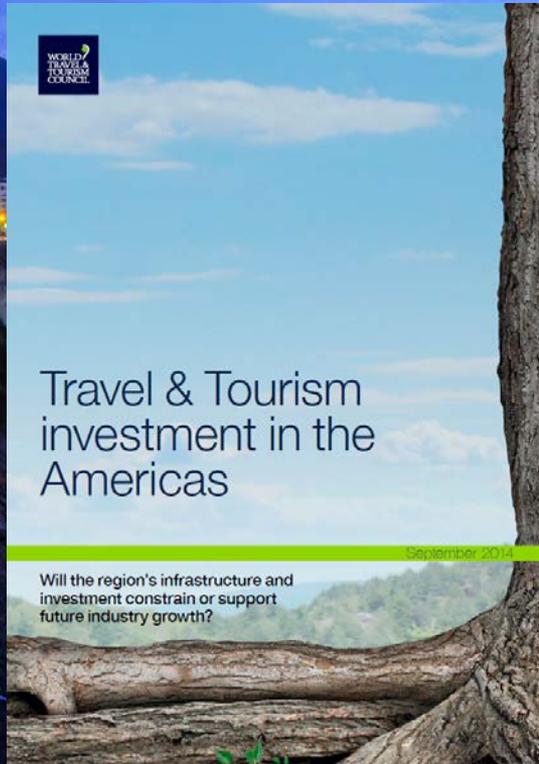
TOURISM FOR TOMORROW

- A Career in Travel & Tourism: Undergraduate Perceptions
- Gender Equality and Youth Employment in Travel & Tourism
- The Future of Travel & Tourism Talent
- Hotel Carbon Measurement Initiative (HCMI)
- Environmental and Social Governance Reporting (ESG)
- **Tourism for Tomorrow Awards Programme**

USA NATIONAL TRAVEL & TOURISM OFFICE

- Travel and Tourism Advisory Board and Tourism Policy Council
- US Export Assistance Centres
- America's Pathways – cultural heritage programme
- Shop America Alliance
- Brand USA

NEED FOR INVESTMENT



State of infrastructure needs to fit with future tourism demand forecasts

Ensure the right business policy and regulatory frameworks are in place to attract necessary investment

Insufficient investment will lead to high costs to countries in terms of economic contribution and jobs

GLOBAL T&T INVESTMENT

- US\$755 bn T&T investment (2013)
- 4.4% of total investment
- Rising by 5.8% in 2014
- 5.1%/year increase over next 10 years

PPP – IMPLEMENTATION ARENAS

- POLICY
- MARKETING
- INVESTMENT

PPP: POLICY

- USA
 - Tourism Policy Council
 - Travel and Tourism Advisory Board
- Mexico
 - Tourism Office coordinates actions of federal agencies through Tourism Cabinet
- UK
 - Tourism Council- partnership between government and tourism and hospitality sector focused on improving skills, increasing the quality/quantity of jobs available, and boosting enterprise

PPP: MARKETING

- Brand USA

- Private sector funding matched 1:1 by government funds (ESTA earnings), up to \$100 million

- Caribbean

- CTO- Collaboration to promote as a destination

- Peaks of the Balkans

PPP: INVESTMENT

- Infrastructure – airports, highways, rail etc
- Hotels and other development
 - ‘Auto-fill’ opportunities – eg Sochi Olympics
 - Process investment – airport development area
 - Competitive advantage – ROI in short-term
- Product development & preservation
- Community development and investment
 - Arts and crafts; women; entrepreneurs

PPP – PATHWAY TO SUCCESS

- Investment opportunity well defined and measurable
- Determine if supply vs demand will be driver
- Clearly frame the incentives and business environment
- Evaluate and ensure workforce needs
- Engage stakeholders from the beginning
- Ensure sustainability through cooperation and partnership



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