



POWERING ECONOMIC RECOVERY; RESTARTING TRAVEL AND TOURISM

The rise and role of digital travel

WHITE PAPER

SITA

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INTERNATIONAL TRAVEL AND TOURISM – INDUSTRY CALL FOR UNIVERSAL ACTION

Throughout 2020 and for much of 2021, we saw aircraft grounded, trains shunted into sidings and cruise ships confined to port. Some eighteen months later, the travel and tourism sector is finally starting to re-emerge from one of the most challenging periods of its history, bringing with it a semblance of a welcome return to normality.

Out of every crisis comes opportunity. And we believe **Digital Travel** is one of the most powerful and transformative opportunities borne of the COVID-19 crisis.

But as we recover from this period of prolonged inactivity, we must also remind ourselves of our collective, aspirational vision of travel for the 21st Century and devise new efficiencies for an industry debilitated by COVID. We must explain how that vision can be brought to life to significantly enhance the passenger experience, reduce queuing, improve border and security checks, and strengthen our resilience to future challenges – particularly in terms of protecting public health.

For Digital Travel, we imagine a world in which travelers can travel from anywhere to everywhere without ever needing to present their travel documents or being required to stop to confirm their identity, check-in, cross a border, or access any number of services at their destination. To realize that vision, we are actively looking for airline, airport, government, and industry partners to join us and co-create capabilities to enable Digital Travel throughout the entire journey with a strong focus on joining up *'Departure'* processes with *'Arrival'* and *'Destination Activities'*.

In this paper, we consider key challenges and industry perspectives, set out our vision, and invite you to join us and play an important role in shaping the future of travel.

CHALLENGES AHEAD: TRAVEL IN UNCERTAIN TIMES

For those working hard to reopen borders, restart international travel and power an economic recovery, there are significant challenges ahead. Citing research conducted by the World Travel & Tourism Council (WTTC) highlighting that the recent crisis has been 18 times worse than the 2008 financial crash¹, outgoing President & CEO, Gloria Guevara, lamented:

“The seriousness of the impact of COVID-19 cannot be overestimated. [...] Research shows the global Travel & Tourism sector alone has been devastated, burdened by an unprecedented loss of almost US\$4.5 trillion. [...] With the sector’s contribution to GDP plunging by almost half, it’s more important than ever that Travel & Tourism is given the support needed so it can help power the economic recovery, which will be instrumental in enabling the world to revive from the effects of the pandemic.” – Gloria Guevara, Outgoing President & Ceo, World Travel & Tourism Council (WTTC)

The challenges ahead come in many forms. Currently, the most pressing is the twin challenge of restoring traveler confidence while protecting public health. And our responses must address the anxieties and concerns affecting travelers today.

New processes which rely on sensitive data about a traveler’s health must come with robust safeguards. And new requirements, such as providing COVID-19 test and vaccine information via solutions such as the European Union’s Digital COVID Certificate², must allow for manual processes to be available, should they be needed, and digitized whenever and wherever possible.

1 Source: World Travel & Tourism Council (WTTC) – 26 April 2021 <https://wttc.org/Portals/0/Documents/Press%20Releases/Leading-Tourism-Ministers-urge-public-and-private-sector-to-work-together-to-save-Travel-Tourism-at-WTTC-Global-Summit.pdf?ver=2021-04-26-191452-853>

2 Source: European Commission https://ec.europa.eu/info/live-work-travel-eu/coronavirus-response/safe-covid-19-vaccines-europeans/eu-digital-covid-certificate_en



Indeed, if the provision and verification of travel health forms are not digitized, we should continue to plan for reduced capacity, extended queuing, and increased traveler confusion. This is a sentiment shared by Willie Walsh, Director-General of the International Air Transport Association (IATA), when recent modelling conducted by the global airline body showed how **time spent in airport processes could reach 5.5 hours per trip at 75% pre-COVID-19 traffic levels, and 8.0 hours per trip at 100% pre-COVID-19 traffic levels**³. Confronting that challenge and proposing a way forward, Walsh went on to say:

“Without an automated solution for COVID-19 checks, we can see the potential for significant airport disruptions on the horizon. [...] Nobody will tolerate waiting hours at check-in or for border formalities. We must automate the checking of vaccine and test certificates before traffic ramps up. The technical solutions exist. But governments must agree digital certificate standards and align processes to accept them. And they must act fast.” – Willie Walsh, Director General, International Air Transport Association (IATA)

The current absence of standards and lack of collaboration has created an unsustainable situation. It is now the case that multiple and varied health apps and wallets co-exist but only work for certain routes, carriers, or countries. This is neither efficient nor scalable and must be remedied in the short term. It is therefore essential to design new requirements and processes for the long term. And do so in a way that is both sustainable and efficient – operationally and financially – and convenient for travelers.

³ Source: International Air Transport Association (IATA) – 31 May 2021 <https://airlines.iata.org/news/digitization-needed-for-smooth-restart-of-travel>



BUT WHAT DOES DIGITAL TRAVEL REALLY MEAN?

We believe **Digital Travel** will play a pivotal role in putting economies back on a pathway to growth and prosperity. But what does Digital Travel mean? And what role will it play in driving economic growth, protecting public health, and shaping future travel experiences?

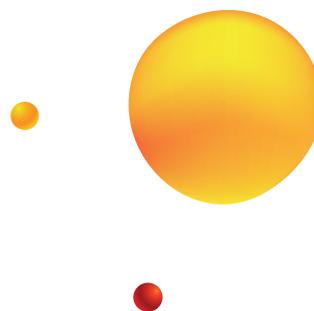
Firstly, **for Digital Travel to succeed, we must develop a global trust framework – one that respects privacy, is transparent and based on informed consent.** This way, the **Digital Identity** of every passenger can be captured, verified and securely shared, but only with authorized stakeholders involved in their journey and only for the purpose for which it was provided.

This thinking is already being taken up by critical players, such as the European Union Agency for the Operational Management of Large-Scale IT Systems in the Area of Freedom, Security and Justice (eu-LISA), as evidenced by remarks made by Executive Director, Krum Garkov, at the close of the recent eu-LISA Industry Roundtable in June 2021:

“[...] the adoption of state of the art contactless biometric identification technologies, replacing physical identity with cutting edge digital identity solutions, and numerous other solutions providing effective and uninterrupted access to relevant information, will help streamline border crossing processes where necessary.” – Krum Garkov, Executive Director, European Union Agency for the Operational Management of Large-Scale IT Systems in the Area of Freedom, Security and Justice (eu-LISA)

Digital Travel imagines a world in which every single travel process is digital by default. In a near-term and readily achievable future, passengers’ digital identities will become the master key to unlock every aspect of their journey – from the earliest intention to travel, all the way to their destination activities and return journey home. This will signal the end of passengers having to present various travel documents, tickets, health forms, and boarding passes – delivering benefits via a universal reduction in queuing times and traveler confusion.

One way to achieve that, as identified in ongoing research conducted by SITA Labs, is to fully explore the concept of *“Interactive Zero-Knowledge Proof”* when designing new online services and adopting a privacy-by-design approach. The Zero-Knowledge concept would enable travelers to prove they meet requirements regarding identity and health without ever having to share the information itself.



⁴ Source: International Air Transport Association (IATA) – 31 May 2021 <https://airlines.iata.org/news/digitization-needed-for-smooth-restart-of-travel>

WHAT ABOUT OTHER INITIATIVES DESIGNED TO FACILITATE INTERNATIONAL TRAVEL?

While there is still much work to be done before Digital Travel becomes a universal reality, the good news is: SITA is not alone in pursuing this goal. We stand together with industry bodies such as IATA and Airports Council International (ACI). We advocate for the adoption of global standards and applaud initiatives such as the *Digital Travel Credential (DTC)*, led by the International Civil Aviation Organization (ICAO). And we are honored to play our part in the development of the *Safe & Seamless Traveler Journey (SSTJ)* initiative of the World Travel & Tourism Council (WTTC).⁵

However, these initiatives have invariably focused on developing proof-of-concept trials focusing on just one transport operator, port or government authority. There is also an inherent risk of sensitive passenger data (*i.e. Personally Identifiable Information (PII)*) being inadvertently shared with other stakeholders without the passenger's knowledge or consent.

The latter is an unintended consequence of working with unfamiliar tools and processes. But until passengers can use their preferred apps to verify their identity and undertake key process steps, it is likely to continue.

From a consumer standpoint, the availability of multiple, competing apps is affecting adoption rates and user experiences in areas such as parking and ordering food and drink in bars and restaurants. It is impractical to expect everyone to install and configure a new app every time they park on a different street or order dinner in a new restaurant. Consumers should be able to choose to use their preferred apps to perform all of these tasks, regardless of their location. It is this thinking that drives our approach to Digital Travel.

ON THE ROAD TO DIGITAL TRAVEL

The pandemic has brought with it new – and constantly shifting – requirements and priorities, many of which remain ambiguous or in a state of flux today.

The industry has made worthy progress on the digitization of essential processes, such as obtaining a visa, booking travel and organizing accommodation. For its part, the aviation sector has come a long way in transforming outdated paper-based processes to modern digital equivalents. And it will soon be the case – throughout all 27 Member States of the European Union – that the process of verifying a passenger's identity and 'stamping' their passport will become fully digitized and automated.⁶

But there is more work to be done. We must not lose sight of the importance of ensuring government authorities receive the information they need when they need it. Indeed, only when they are satisfied with the quality, completeness and timeliness of information received – particularly for the traveler's digital identity – can we realistically expect to turn our attention to devising better, faster, more streamlined passenger experiences.

And we must ensure new requirements do not add confusion, time or complexity to the journey. It is simply not enough for one airport, transport operator or hotel to make standalone digital options available to their passengers and guests. To succeed and ensure operations are demonstrably capable of making travel easier every step of the way, Digital Travel *must* be universal. It will enable passengers to have direct control over every aspect of a safe, secure, easy and trusted process – whenever, wherever and however they travel.

⁵ Ref. <https://wtcc.org/Initiatives/Security-Travel-Facilitation>

⁶ Source: European Commission Migration & Home Affairs
https://ec.europa.eu/home-affairs/what-we-do/policies/borders-and-visas/smart-borders/ees_en



FROM CRISIS TO OPPORTUNITY: MAKING THE CASE FOR CHANGE

Crucially, making travel easier – by making processes digital – reduces barriers to adoption. Operations must be cost-efficient and sustainable. And to deliver safe, secure and easy travel experiences, we must continue to leverage the trend towards automation through greater availability of digital options.

As an industry, seizing the opportunity of Digital Travel will enable us to:

- restore traveler confidence;
- restart travel and tourism to power economic growth;
- reduce queues and increase capacity;
- strengthen data privacy;
- eradicate inefficient manual, paper-based processes;
- develop international standards and best practices to support government and industry;
- ensure new public health requirements are scalable and sustainable over the long term;
- strengthen our collective resilience to future challenges – particularly in terms of protecting public health
- deliver more and consistently better passenger experiences.

What's needed is an interconnected, interoperable, trust-based ecosystem that connects systems, processes and devices at every stage of the journey. As highlighted in our 2020 Passenger IT Insights Report, *"passengers want technology that helps them automate their entire journey and enables a more fluid travel experience"*.

Technology adoption is the key enabler to deliver the digital travel experiences passengers want. But throughout their journey, levels of technology adoption vary greatly. While Booking and Check-In boast levels of 93% and 66% respectively, Self Bag Drop (24%), Identity Control (38%), Boarding (18%) and Border Control (27%) are nowhere near where they need to be, adding barriers to a much-needed restart for the travel and tourism economy⁷. Other processes, including Bag Collection, Hotel Check-In, Car Rental and Destination Activities, are even further behind. These need to be reimagined as a priority if we are truly committed to offering passengers digital options throughout their entire journey.

⁷ Source: SITA 2020 Passenger IT Insights Report – <https://www.sita.aero/resources/surveys-reports/passenger-it-insights-2020/8>



WHERE STANDARDS EXIST, WE IMPLEMENT THEM. WHERE THEY DO NOT, WE CREATE SMART, FUTURE-PROOF TECHNOLOGIES TO DELIVER THE DESIRED OUTCOMES TODAY AND KEEP BUILDING MOMENTUM FOR THE REALITY OF DIGITAL TRAVEL TOMORROW.

HOW CAN SITA ENABLE THE REALIZATION OF DIGITAL TRAVEL?

For most of the last century and all of this one, SITA's role has been to connect the global aviation industry and enable easy travel every step of the way. And for the past 25 years, we have been connecting government authorities with the air transport industry to support the digitization of immigration and border control processes. For the foreseeable future, we will leverage our experience to prioritize industry collaboration to ensure future operations deliver better, safer and more secure travel experiences and are financially sustainable for the long term.

We see our role as one of building bridges to connect every core business, operational, logistical and passenger process throughout the transport sector. For the most part, these bridges are built on a technological foundation underpinned by global standards we helped create. Elsewhere, these bridges are built by applying decades of experience and expertise to enable early adopters to transform to Digital Travel now – while also allowing later adopters to wait until standards are developed and ultimately adopted.

Where standards exist, we implement them. Where they do not, we create smart, future-proof technologies to deliver the desired outcomes today and keep building momentum for the reality of Digital Travel tomorrow.

CALL TO ACTION: COLLABORATE TO INNOVATE

Today, both government and industry stakeholders are investing considerable time and resource answering critical questions, such as: *“what will help drive the recovery and growth of our travel and tourism economy?”*.

As Ministers of Transport, Ministers of Tourism – and the advisors and officials who support them – drive efforts to restart and grow their country's travel and tourism economies, answers to critical questions must be found. Business Travelers, grounded for more than a year, will doubtless have some concerns and anxieties about travelling again. And they will be wondering what to expect for the future of travel.

Fortunately, SITA can help answer these questions. And the answers will enable the travel and tourism sector to take purposeful steps forward to reducing barriers to travel, providing better experiences at every stage of the journey, and digitizing core functions to reduce costs, improve outcomes, and ensure government authorities can identify risks – and mitigate them – at the earliest opportunity.

Today, at SITA, we are actively looking for government and industry partners to join us and co-create capabilities to enable Digital Travel throughout the entire journey with a strong focus on Arrivals and Destination Activities.

We would like to invite you to join us in shaping the future of travel. If restoring traveler confidence and promoting growth and prosperity in your country's travel and tourism economies are important to you, please get in touch. Making travel easier, every step of the way, is what we do.

For more information, please contact Nesan Jegasothy, SITA's Borders and Government Specialist at: borders.enquiry@sita.aero





SITA AT A GLANCE

Easy and safe travel every step of the way.

- Through information and communications technology, we help to make the end-to-end journey easier and safer for passengers – from pre-travel, check-in and baggage processing, to boarding, border control and inflight connectivity.
- We work with over 400 air transport industry members and 2,500 customers in over 200 countries and territories. Almost every airline and airport in the world does business with SITA, and nearly every passenger trip relies on SITA technology.
- Our customers include airlines, airports, ground handlers, aircraft, air navigation service providers, and governments.
- Our solutions drive operational efficiencies at more than 1,000 airports, while delivering the promise of the connected aircraft to customers of 18,000 aircraft globally.
- We help more than 70 governments to strike the balance between secure borders and seamless travel.
- Created and owned 100% by air transport, SITA is the community's dedicated partner for IT and communications, uniquely able to respond to community needs and issues.
- We innovate and develop collaboratively with our air transport customers, industry bodies and partners. Our portfolio and strategic direction are driven by the community, through the SITA Board and Council, comprising air transport industry members the world over.
- We provide services over the world's most extensive communications network. It's the vital asset that keeps the global air transport industry connected in every corner of the globe and bridging 60% of the air transport community's data exchange.
- With a customer service team of over 1,700 people around the world, we invest significantly in achieving best-in-class customer service, providing 24/7 integrated local and global support for our services.
- Our annual Air Transport and Passenger IT Insights reports for airlines, airports and passengers are industry-renowned, as is our Baggage IT Insights report.
- We are a certified CarbonNeutral® company, reducing our greenhouse gas emissions for all our operations through our UN recognized Planet+ program. We also develop solutions to help the aviation industry meet its carbon reduction objectives, including reduced fuel burn and greater operational efficiencies at the airport.

For further information, please visit www.sita.aero



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