Russia&CIS
Hotel Investment Conference

MODERATOR





Helen Marano

Vice President of Government & Industry Affairs

World Travel & Tourism Council



MAKING THE CASE FOR TAKING TOURISM SERIOUSLY

Why is it of economic importance For Russia & the CIS? What countries can be held up as examples of ‘best–practice’?



WORLD TRAVEL & TOURISM COUNCIL

Helen Marano

Vice President of Government & Industry Affairs, WTTC

Russia & CIS Hotel Investment Conference

17 OCTOBER 2012





WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism













Maximise the sustainable growth potential of Travel & Tourism




By informing government, the media and the wider society



Of its enormous economic and social benefits to the world community




















Our Mission

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







Hotels

Tour Operators

Airlines

Car Rental

Cruise Lines

GDS/Technology

Travel agencies







Cross sector representation

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







Abercrombie & Kent · ACCOR · AMERICAN EXPRESS · BTG 首旅集团 BEIJING TOURISM GROUP · CARLSON · Emirates · ETIHAD AIRWAYS · GLOBAL LEISURE PARTNERS GLP

HILTON WORLDWIDE · INTERCONTINENTAL HOTELS & RESORTS · JUMEIRAH GROUP · THE LALIT NEW DELHI · MANDARIN ORIENTAL THE HOTEL GROUP · Marriott · MELIÃ HOTELS INTERNATIONAL

OUTRIGGER HOTELS • RESORTS · RIOFORTE · Sabre Holdings · SILVERSEA Above and Beyond All Expectations™ · SHUN TAK Shun Tak Holdings Limited 信德集團有限公司 · THE TRAVEL CORPORATION DRIVEN BY SERVICE

Travel Guard Travel Smart. Travel Insurance. · Travelport · TSOGO SUN GROUP Hotels, Gaming & Entertainment · TUI Aktiengesellschaft · VisitBritain · WYNDHAM WORLDWIDE



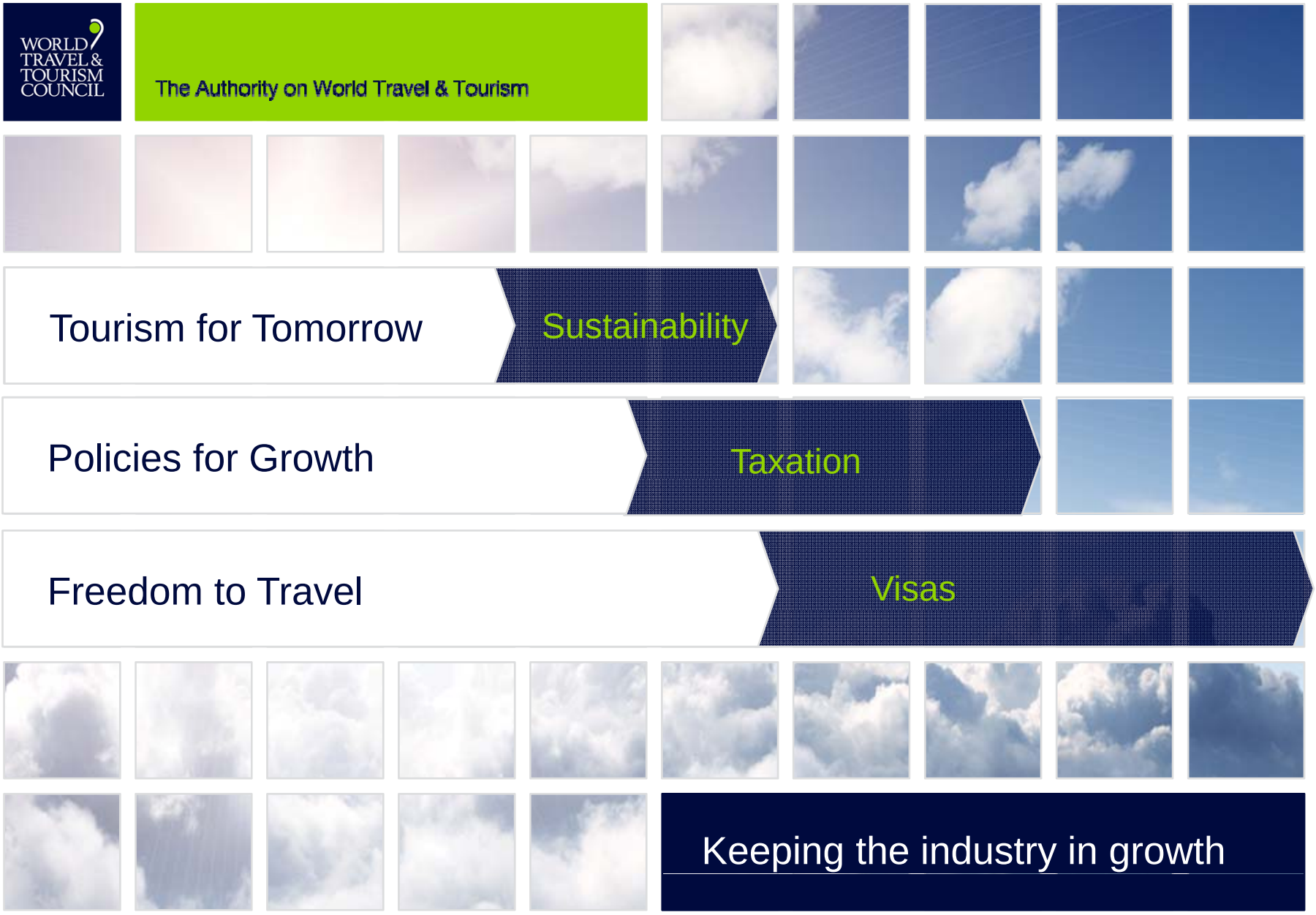




Leading brands

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism



WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism



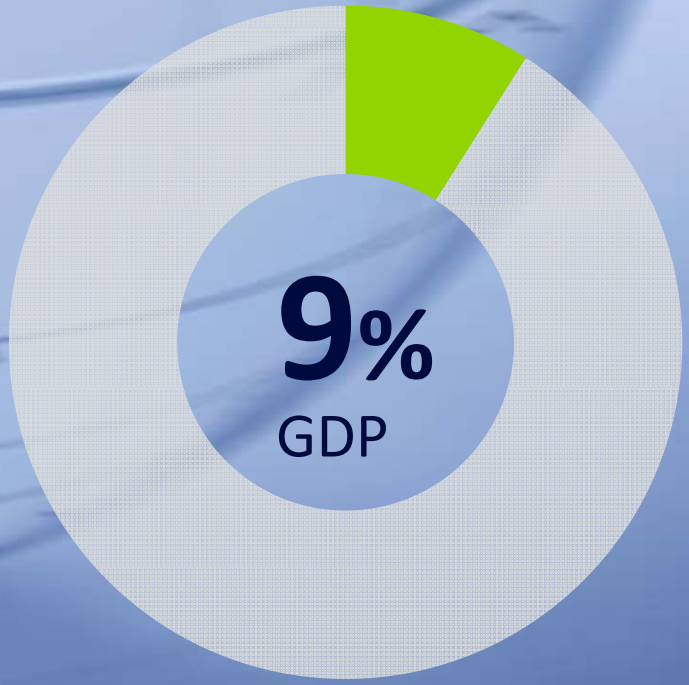




255 million jobs

1 in 12 jobs

$6 trillion contribution









2011 Global Data

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







8% GDP — Automotive

Banking — **11%** GDP

Mining — **8%** GDP

9% GDP — Travel & Tourism

11% GDP — Communications Services

9% GDP — Manufacturing

Financial Services — **18%** GDP







2011 Industry Comparison

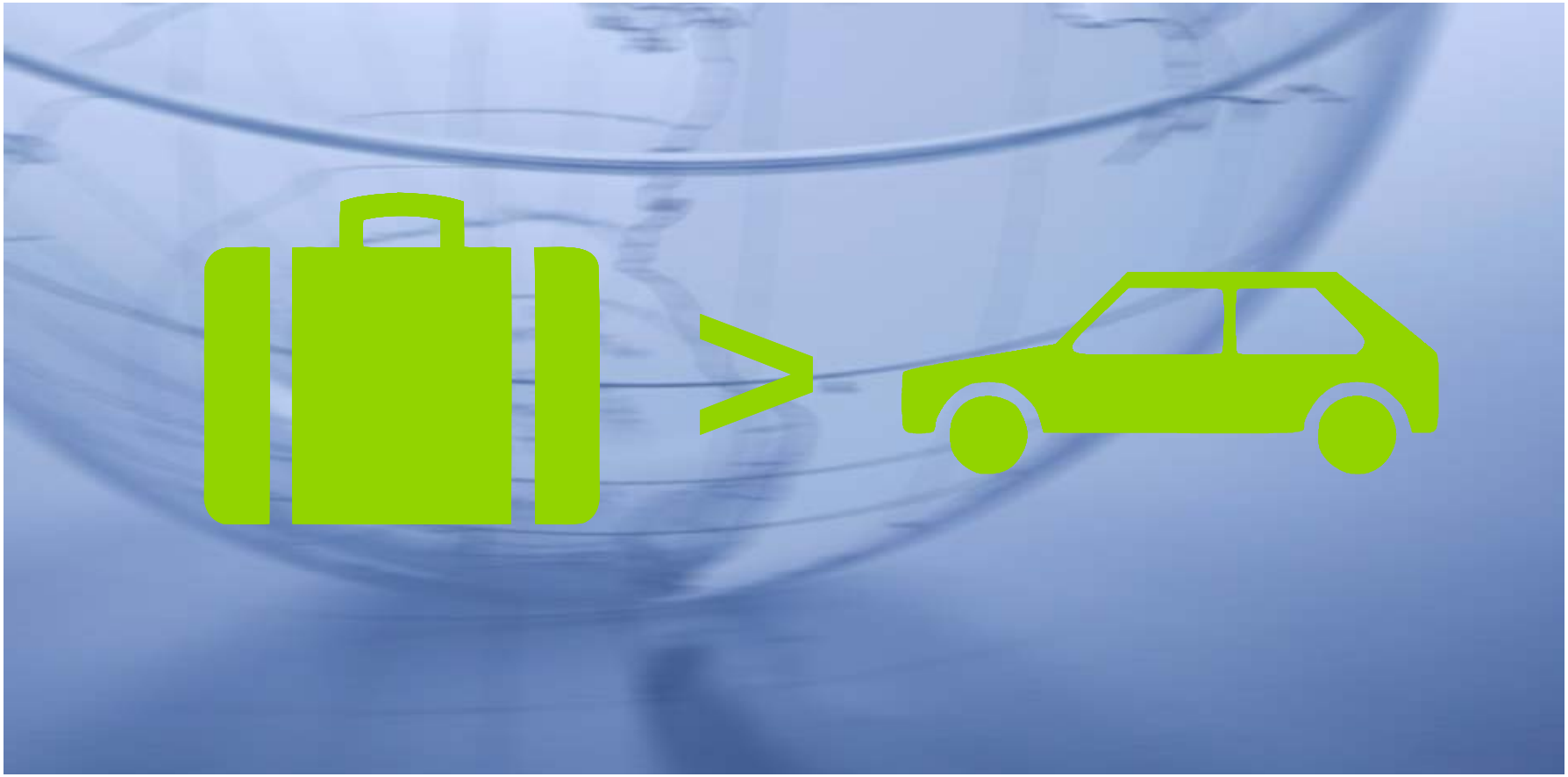
WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism















Travel & Tourism Employment

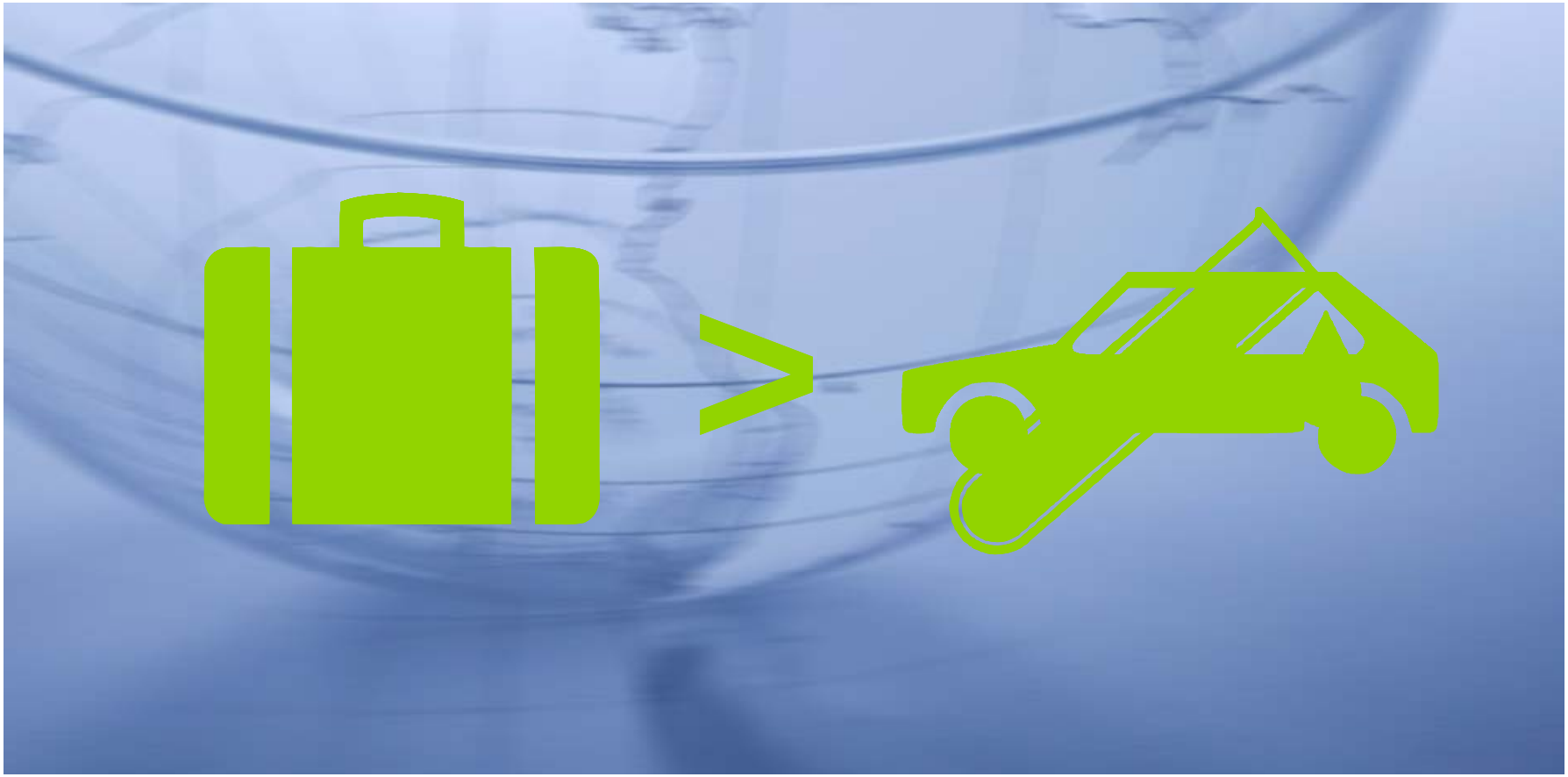
WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism















Travel & Tourism Employment

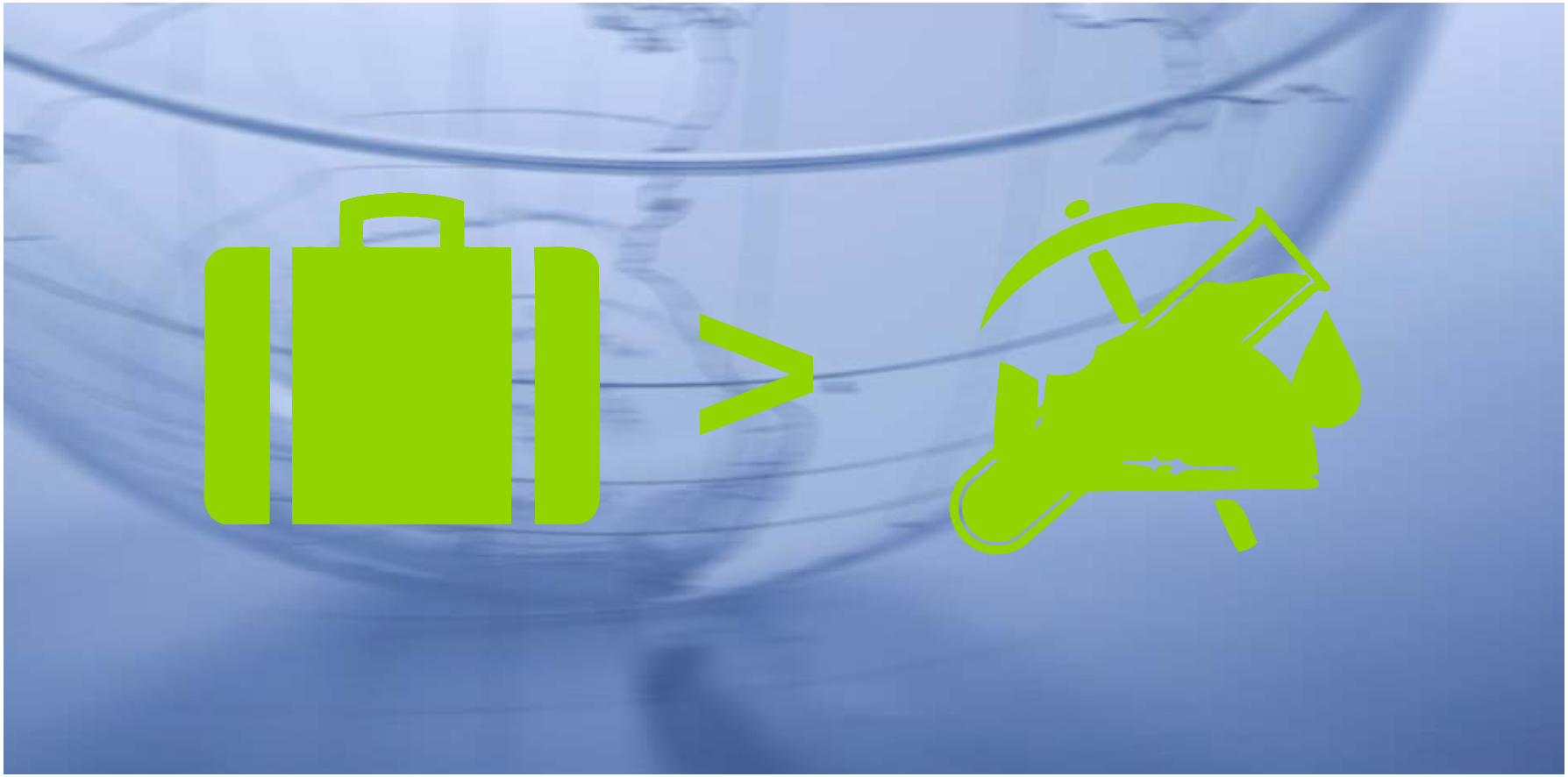
WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism















Travel & Tourism Employment

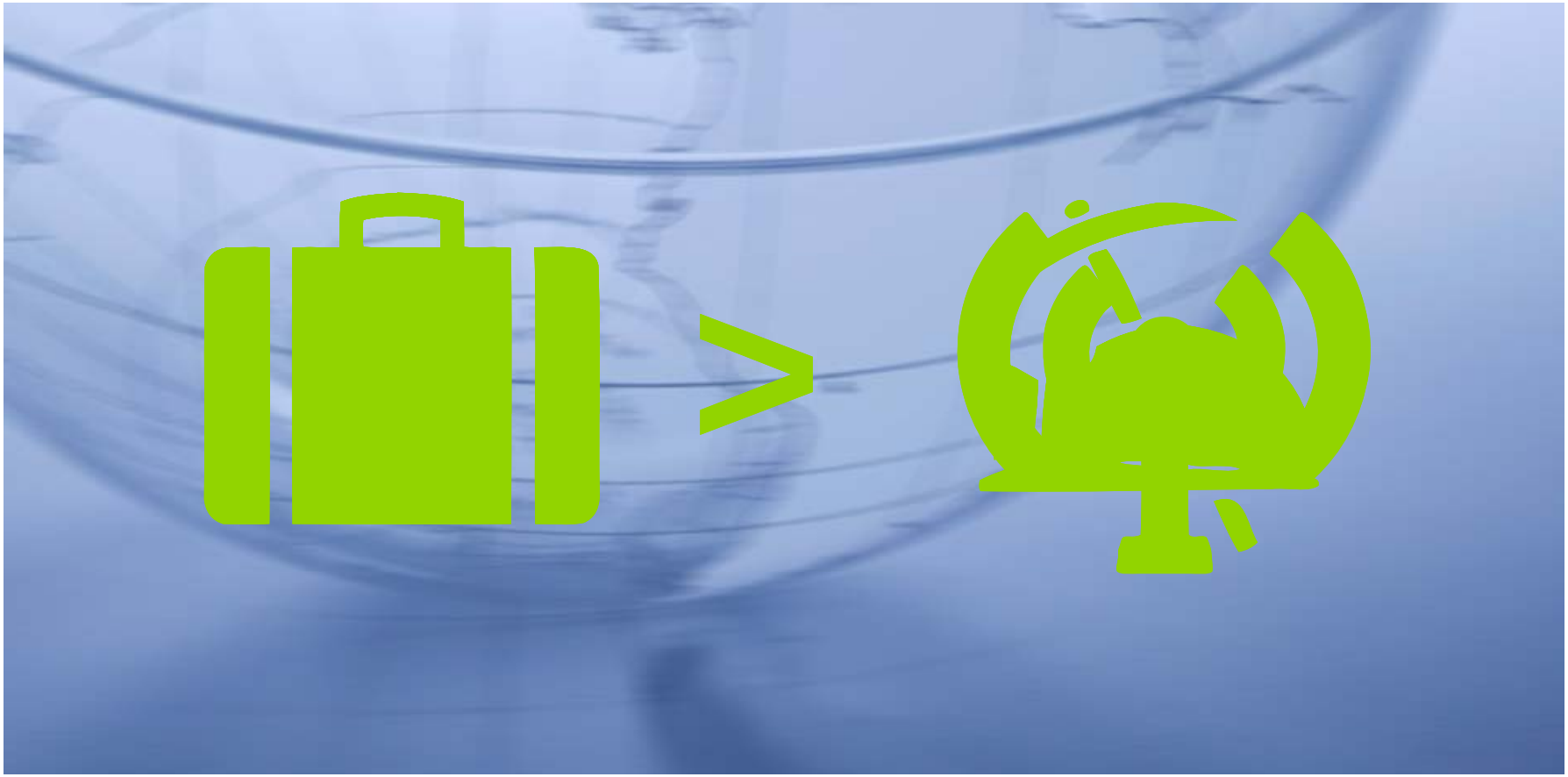
WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism















Travel & Tourism Employment

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism















Travel & Tourism Employment

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







2.8%
GDP

2.0%
Jobs







2012 Forecasts

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







328 million jobs

1 in 10 jobs

$10 trillion contribution









2022 Global Forecast

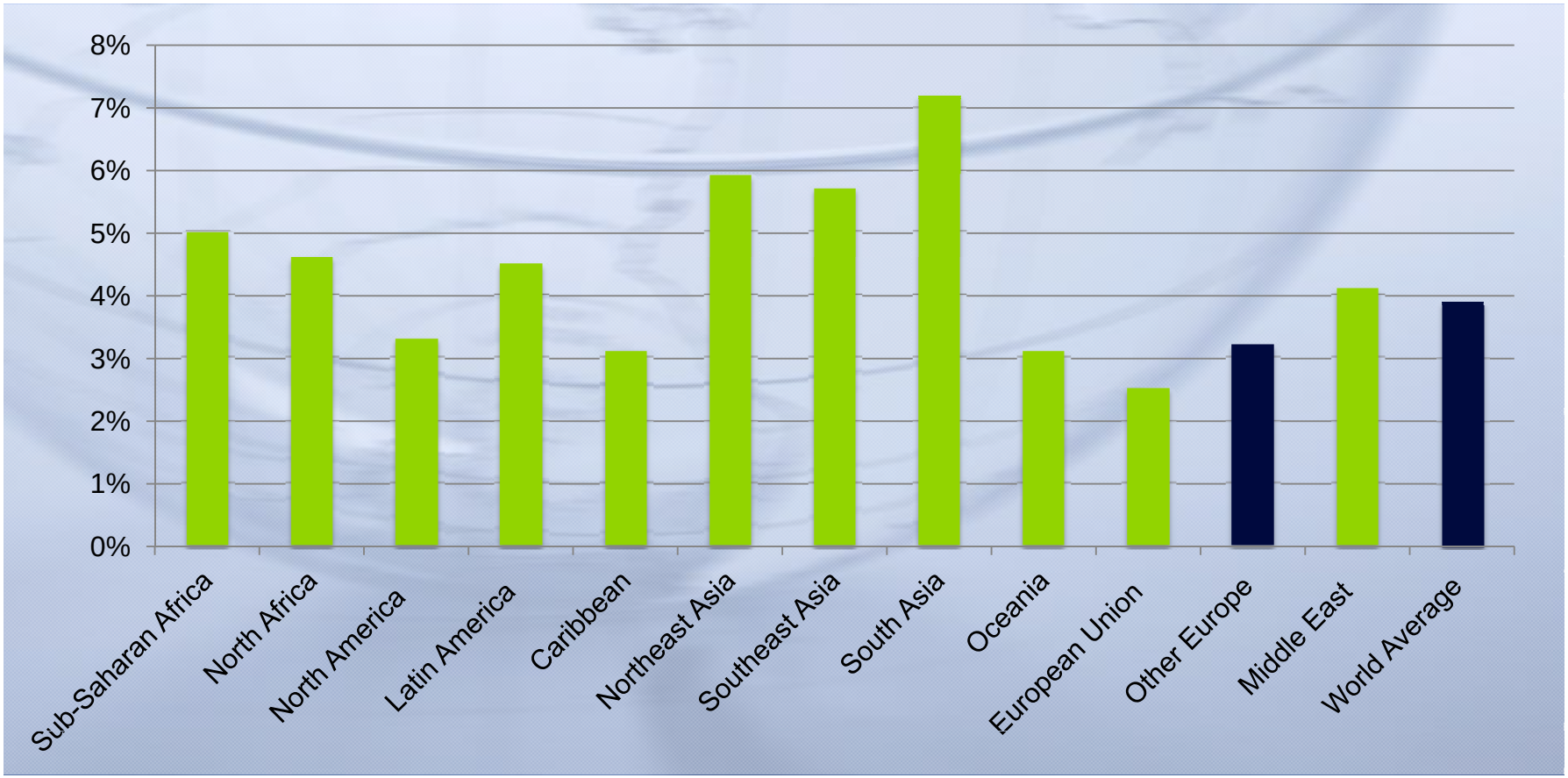
WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism















Growth per annum 2013 - 2022

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







4 million jobs

1 in 18 jobs

RUB **3** billion contribution









Russia Data 2011

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







2.8% of total investment in 2011, will grow by 2.1% in 2012

6% growth in GDP contribution expected in 2012

4% growth per annum over next ten years







Russia Outlook

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







Contributes more to GDP than automotive manufacturing

Generates more employment than chemicals

30% of service exports (2.9% of total exports)

RUB 500 billion in visitor exports







Russia Benchmarking

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







WTTC and UNWTO study on visa facilitation in G20:

3-16% gain in arrivals creating up to 5 million more jobs by 2015

Represents a US$206 increase in additional tourism receipts







Impact of easing visas

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







President Calderon recognises importance of Travel & Tourism

Visa free travel with Colombia, Peru, Chile from 1 Nov

Pushing for a single visa for entire region







Mexico

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism







Obama's Executive Order recognises T&T as important job creator

Reduced wait times and increased capacity for visas

Sept 2012- eased visa restrictions for Russian travellers







USA

WORLD TRAVEL & TOURISM COUNCIL

The Authority on World Travel & Tourism



Visa Facilitation



WORLD TRAVEL & TOURISM COUNCIL

Thanks for your attention!

Let’s move to the panel now.



