Routes Silk Road
UNWTO Ministers Meeting

Steven Small
Sasha Woodward

08/03/2019
About Us

Steven Small
Brand Director
Routes

• An economic development and tourism specialist, Steven’s career has focussed on working with destinations supporting inward investment, tourism and economic development initiatives.

• Prior to Routes, Steven was Head of Tourism for the City of Liverpool developing a long term strategy to maximise the explosion of the visitor economy.

• Steven spent 7 years at Marketing Manchester working on a variety of projects including funding packages for the city’s main convention venue and the new National Football Museum, delivering the route development fund for Manchester Airport, as well as attracting major new events and conferences to the city.

Sasha Woodward
Senior Account Manager
Routes

• Sasha joined Routes in 2008, and is responsible for the development of the CIS regions, managing their attendance at all Routes events.

• Sasha has been instrumental in driving significant growth from the region into the Routes events, helping her region to understand the importance of route development.

• Sasha has previously worked closely with the UNWTO and has spoken about the importance of air services at ministers meetings in the past.

• Sasha studied Tourism Economics and Law at the University of Kiev.
About Routes

• Routes is focused entirely on aviation route development and celebrates its 25th year in 2019.

• There are five regional Routes events and World Routes, the flagship event, all take place on annual basis.

• They range in size from 250 delegates at Routes Africa to 3,500 to World Routes.

• The events are niche business to business events, are peripatetic and all operate on a hosted model.

• They are supported year round by Routesonline, the online platform for the route development community.
What does the future hold for aviation?

By 2037, according to IATA figures:
- 8.2 billion air travellers
- $5.5 trillion GDP supported
- 100 million jobs globally
## Seat Capacity

<table>
<thead>
<tr>
<th>Country</th>
<th>2014 Total Capacity</th>
<th>2018 Total Capacity</th>
<th>5-year % Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>RUSSIA</td>
<td>179,821,443</td>
<td>224,021,820</td>
<td>25%</td>
</tr>
<tr>
<td>KAZAKHSTAN</td>
<td>15,088,836</td>
<td>19,354,245</td>
<td>28%</td>
</tr>
<tr>
<td>UZBEKISTAN</td>
<td>6,379,968</td>
<td>6,708,355</td>
<td>5%</td>
</tr>
<tr>
<td>GEORGIA</td>
<td>2,702,104</td>
<td>6,171,402</td>
<td>128%</td>
</tr>
<tr>
<td>AZERBAIJAN</td>
<td>4,754,691</td>
<td>5,611,972</td>
<td>18%</td>
</tr>
<tr>
<td>BELARUS</td>
<td>2,755,758</td>
<td>5,197,915</td>
<td>89%</td>
</tr>
<tr>
<td>TURKMENISTAN</td>
<td>1,508,471</td>
<td>4,469,681</td>
<td>196%</td>
</tr>
<tr>
<td>MOLDOVA</td>
<td>1,917,222</td>
<td>3,661,698</td>
<td>91%</td>
</tr>
<tr>
<td>ARMENIA</td>
<td>3,040,181</td>
<td>3,655,260</td>
<td>20%</td>
</tr>
<tr>
<td>KYRGYZSTAN</td>
<td>4,144,152</td>
<td>3,590,880</td>
<td>-13%</td>
</tr>
<tr>
<td>TAJIKISTAN</td>
<td>3,232,758</td>
<td>2,663,612</td>
<td>-18%</td>
</tr>
</tbody>
</table>

## O&D Passengers

<table>
<thead>
<tr>
<th>Country</th>
<th>2014 O&amp;D Pax</th>
<th>2018 O&amp;D Pax</th>
<th>5-Year % Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>RUSSIA</td>
<td>87,858,811</td>
<td>104,330,053</td>
<td>19%</td>
</tr>
<tr>
<td>KAZAKHSTAN</td>
<td>6,864,250</td>
<td>8,801,155</td>
<td>28%</td>
</tr>
<tr>
<td>GEORGIA</td>
<td>1,838,552</td>
<td>4,621,171</td>
<td>151%</td>
</tr>
<tr>
<td>UZBEKISTAN</td>
<td>3,731,095</td>
<td>4,368,040</td>
<td>17%</td>
</tr>
<tr>
<td>AZERBAIJAN</td>
<td>3,200,160</td>
<td>3,911,661</td>
<td>22%</td>
</tr>
<tr>
<td>BELARUS</td>
<td>2,077,284</td>
<td>2,883,575</td>
<td>39%</td>
</tr>
<tr>
<td>ARMENIA</td>
<td>2,289,132</td>
<td>2,881,026</td>
<td>26%</td>
</tr>
<tr>
<td>MOLDOVA</td>
<td>1,603,671</td>
<td>2,704,899</td>
<td>69%</td>
</tr>
<tr>
<td>KYRGYZSTAN</td>
<td>2,573,063</td>
<td>2,426,506</td>
<td>-6%</td>
</tr>
<tr>
<td>TURKMENISTAN</td>
<td>1,021,901</td>
<td>2,243,001</td>
<td>119%</td>
</tr>
<tr>
<td>TAJIKISTAN</td>
<td>2,397,143</td>
<td>1,968,476</td>
<td>-18%</td>
</tr>
</tbody>
</table>

### Top Connecting Flows (Europe to SILK ROAD) - 2018

- **49%**
  - Connect in Europe
- **27%**
  - Connect in Asia
- **15%**
  - Connect in Middle East
- **9%**
  - Connect in CIS

### Top Connection Points:

- **FRA (1.70m)**
- **PEK (1.67m)**
- **DXB (1.64m)**
- **SVO (1.39m)**

### Largest indirect flows:

1. Rome to Wenzhou via Beijing (69,000 pax)
2. Milan to Wenzhou via Shanghai (64,000 pax)
3. London to Hong Kong via Dubai (61,000 pax)
4. Paris to Wenzhou via Shanghai (52,000 pax)
5. London to Taipei via Bangkok (46,000 pax)
Long standing relationship with UNWTO

• Historic affiliate membership.
• We worked on several projects for UNWTO regarding air services.
• Reciprocal speaking engagements at each others events.
• Co-branded conference programmes at Routes and UNWTO events.
• UNWTO Silk Road Task Force meeting held at Routes Silk Road in Georgia.
The Golden Triangle of Route Development

• 88% of airlines, surveyed at World Routes, felt the presence of Tourism Organisations in face to face meetings was more effective.

• 72% of airlines felt meetings at Routes events have lead to the commencement of new air services.
The Impact of Air Services

450 meetings took place at Routes Silk Road 2015 in Georgia

5 new air services launched to Georgia as a result

150,000 tourists per year from these five air services alone
Routes Silk Road 2019
Astana, Kazakhstan
15-17 July 2019

• Long term economic impact for Astana: £13.9 million.

• Over 275 senior decision makers from airlines, airports, tourism authorities and industry related organisations.

• Over 10+ hours of aviation content delivered by industry leaders

• Over 450 face-to-face meetings.

• IATA workshops.
THANK YOU