



CiViTAS

Cleaner and better transport in cities

DESTINATIONS

Understanding the links between transport and tourism

The CIVITAS DESTINATIONS Contribution

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Key issues

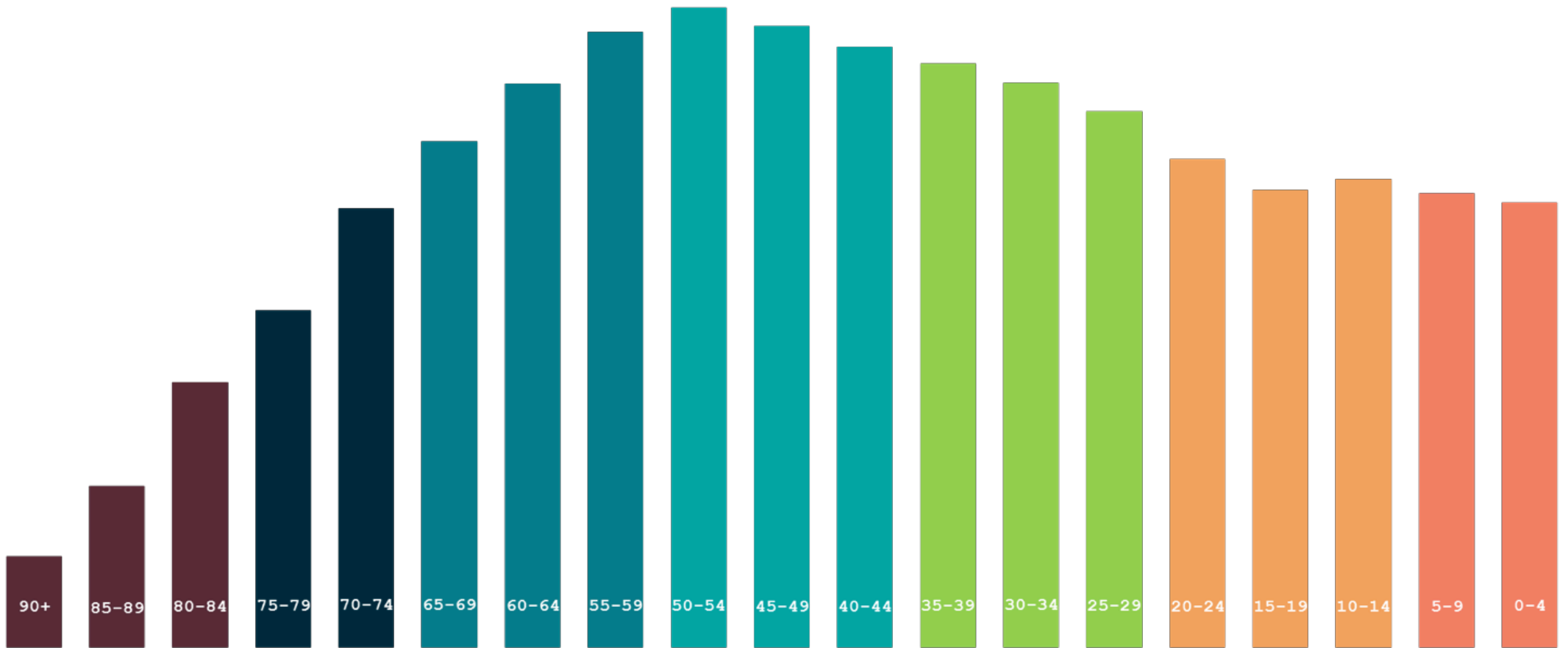
- ***Demographics*** – trends, values and lifestyle
- ***Tourism*** – growth and trends
- ***Insularity*** – features and core aspects
- ***Transport*** – particularities in tourist destinations
- ***Transport and Tourism*** in DESTINATIONS
- ***COVID 19*** – impact
- ***Take-away*** messages



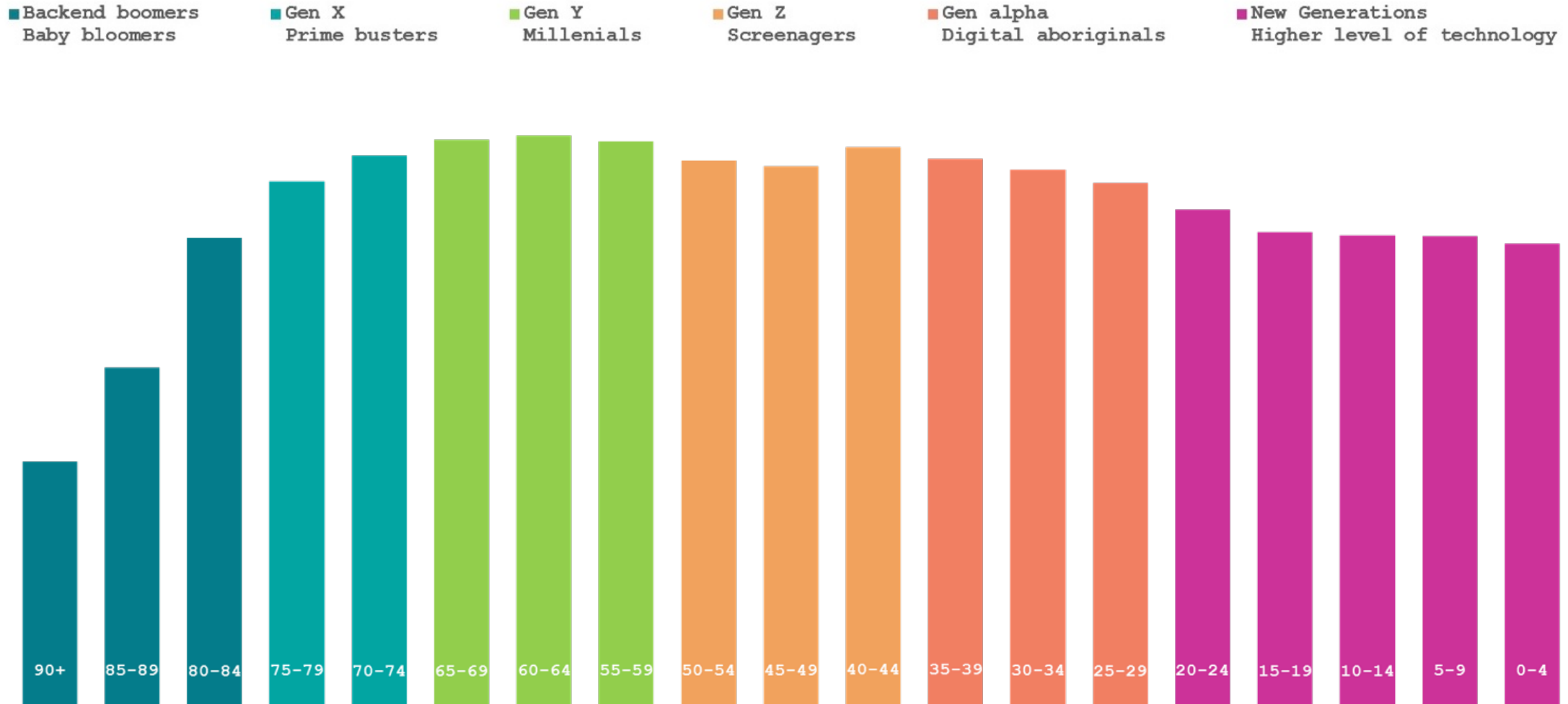
Population – EU-28 - 2020

■ Silent generation
■ Proto boomers
■ Backend boomers
■ Gen X
■ Gen Y
■ Gen Z
■ Gen alpha

Master boomers
Baby boomers
Prime busters
Millenials
Screenagers
Digital aboriginals



Population – EU-28 - 2050





Key value transitions across the generations

- Competitive → collaborative
- Environmental protection → sustainable mobility → carbon reduction
- Ownership → sharing → individually customised
- Digital illiteracy → digital competency → digital normality

Lifestyle changes



01 Somewheres vs. anywheres

02 Increased percentage of disabled population

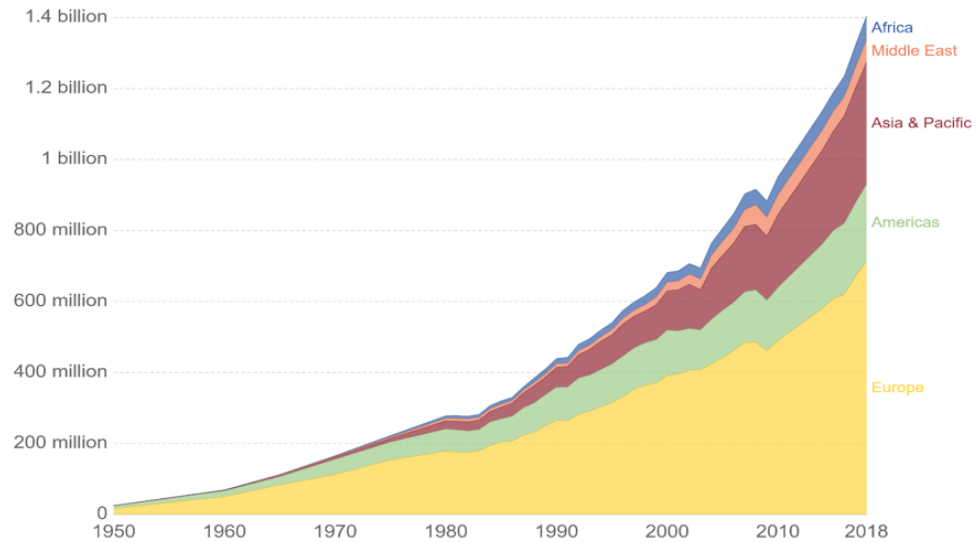
03 Trading place and the rise of the “progressive province”

04 Micro-mobility

05 Uncoupled society

International Tourist Arrivals by World Region

Our World in Data



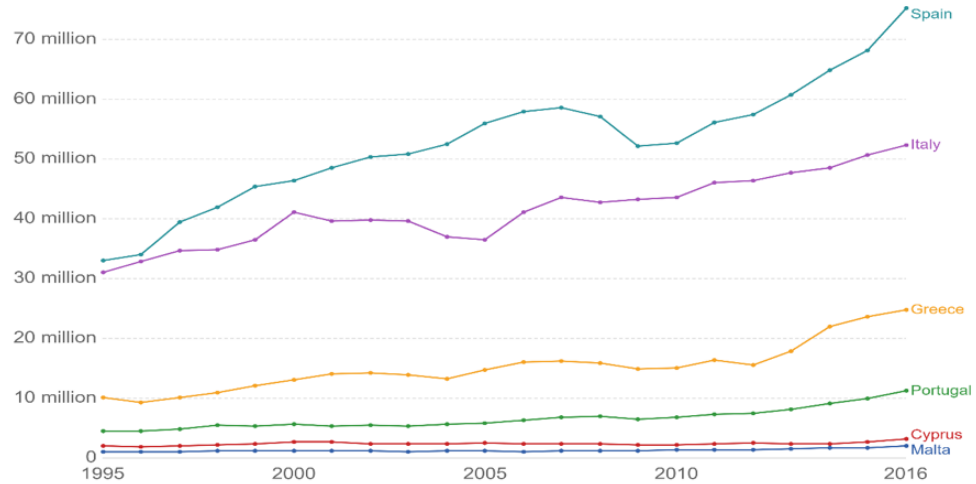
Source: United Nations World Tourism Organization - World Tourism Barometer (2019)

OurWorldInData.org/tourism/ - CC BY

International tourism: Number of arrivals

Overnight visitors who travel to a country whose main purpose in visiting is not commercial.

Our World in Data



Source: World Bank

OurWorldInData.org/tourism/ - CC BY



Growth of the Tourism sector

A hiker with a large orange backpack is sitting on a mountain peak, holding a tablet to take a photo of the landscape. The hiker is wearing a blue jacket and red pants. The background shows a vast mountain range under a clear sky.

The future of tourism: trends

- *Digitalisation*
- *Responsible tourism*
- *Solo travel*
- *Personalisation*
- *Experience over product*



Understanding Insularity – main features

- Small dimension
- Rich natural and cultural resources
- Place to experience the separation
- Geographical isolation

Insularity aspects

- Limited economies of scale
- Limited agglomeration positive externalities
- Higher prices of services and goods
- Significant time delays
- Infrastructures and operation costs
- Limited skill base
- Vulnerability of environment
- Limited services and goods to final users
- Governance issues



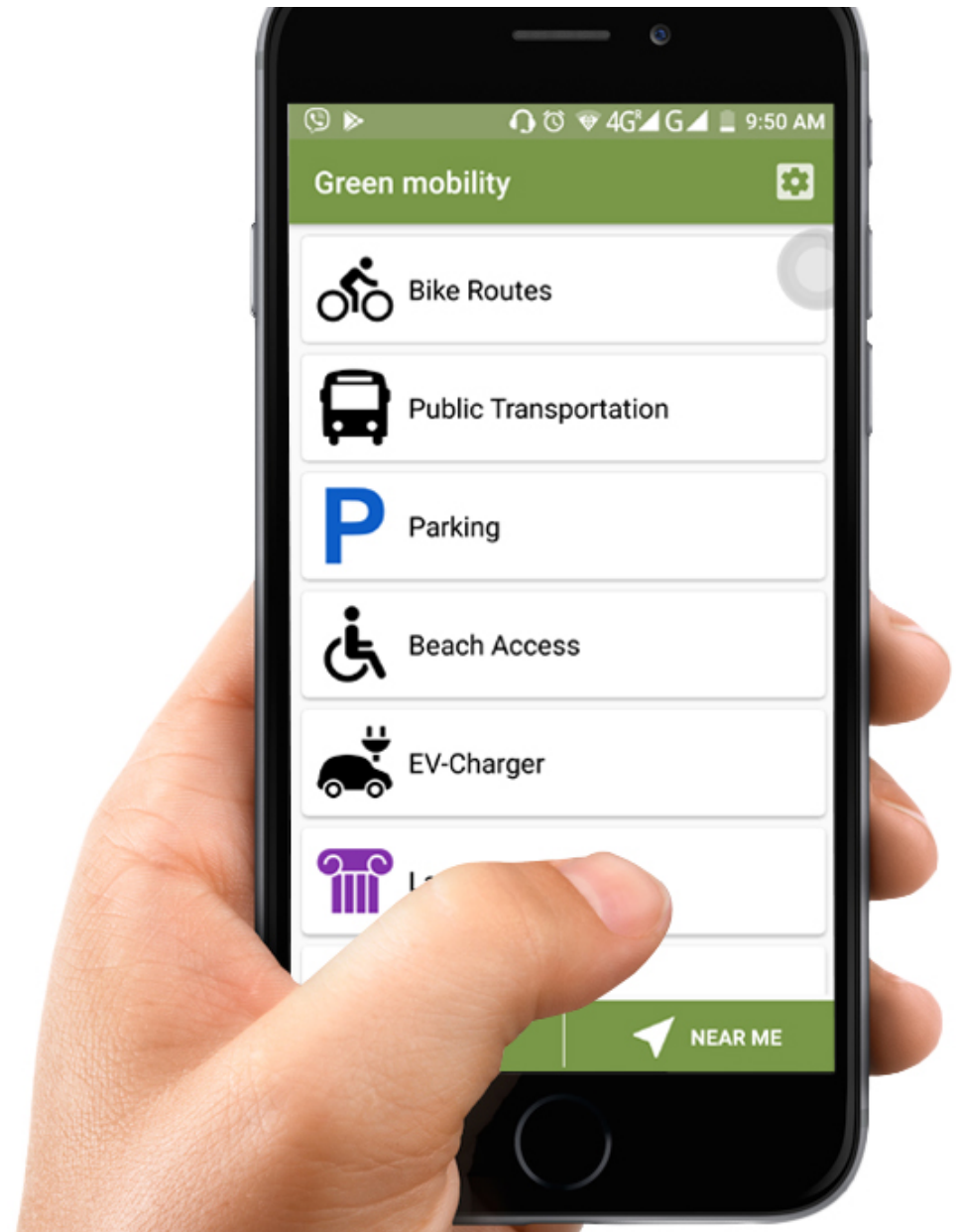


Transport in tourist destinations

- Accessible
- Integrated
- Inclusive

Transport and Tourism in CIVITAS DESTINATIONS

- Cross-sector promotion
- Cross sector products



Transport and Tourism in CIVITAS DESTINATIONS

Providing information on sustainable mobility options and tourist attractions



Transport and Tourism in CIVITAS DESTINATIONS

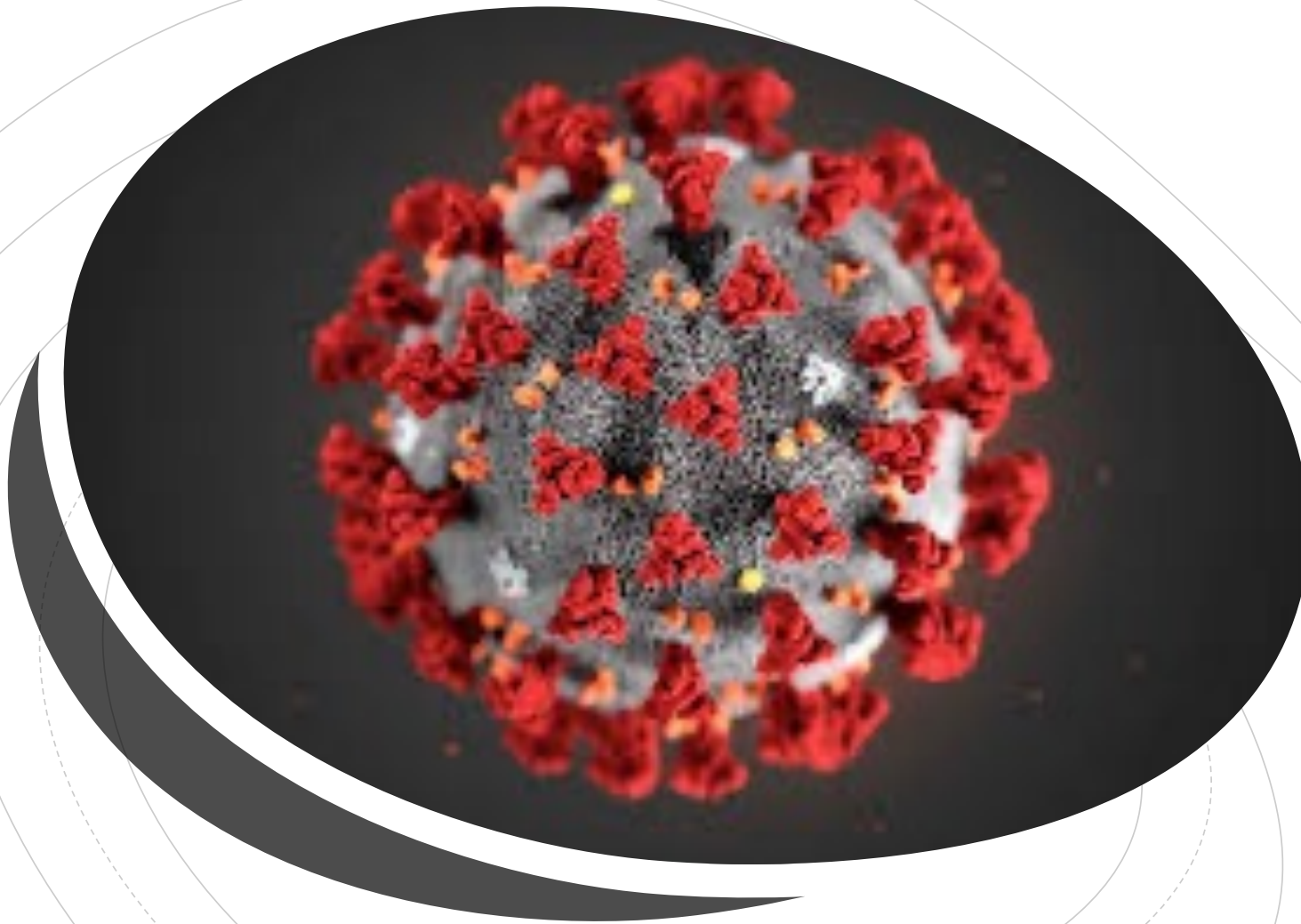
Inclusivity and transport for all



Transport and Tourism in CIVITAS DESTINATIONS

“Green” recognition

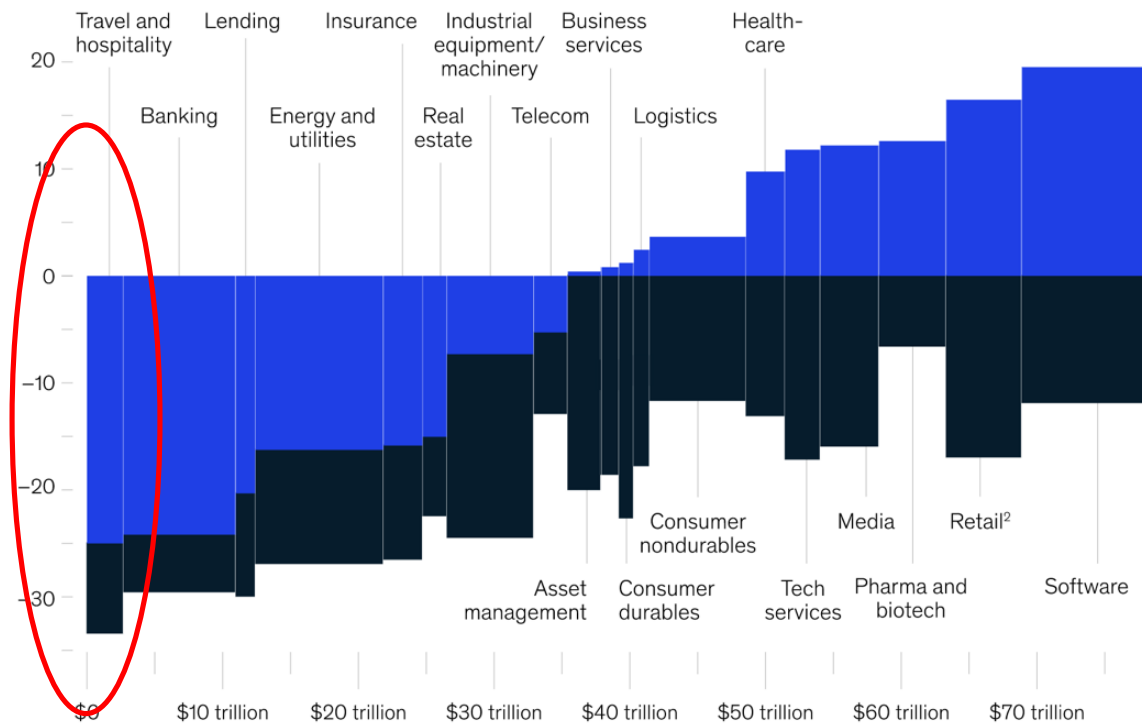




COVID Impact on Transport and Tourism

Market capitalization¹ by sector, index (0 = Dec 31, 2019)

■ As of Jul 31, 2020
 ■ As of Mar 31, 2020

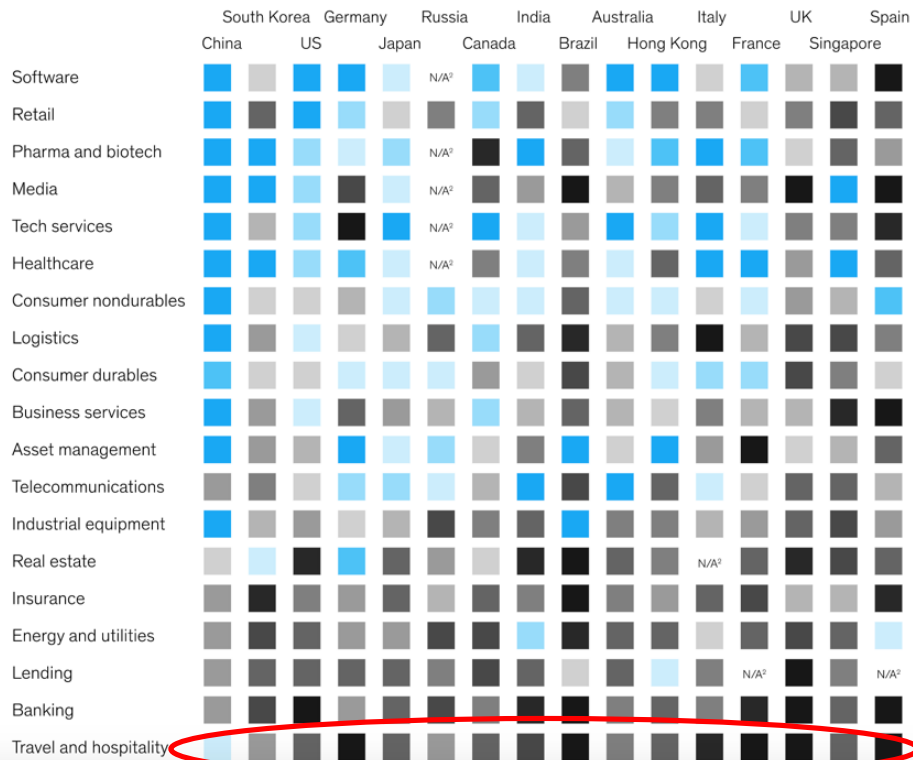


¹For 15,500 public companies with revenue of more than \$100 million in their sectors. Adjusted for dividends and buybacks. Width of bar equals proportion of all

Source: <https://www.mckinsey.com/business-functions/risk/our-insights/covid-19-implications-for-business#>

Global growth of different economic sectors

Market capitalization¹ by sector, July 31, 2020,
% change (year to date)

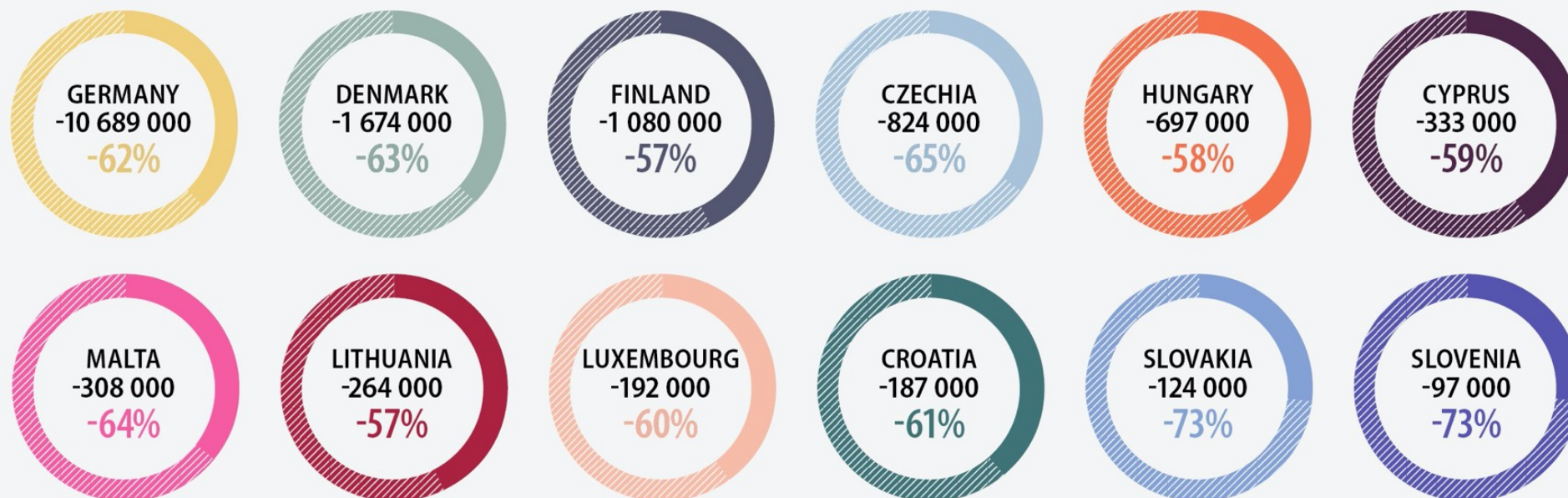


Change in sector value varies across the countries

Source: <https://www.mckinsey.com/industries/private-equity-and-principal-investors/our-insights/a-rolling-disruption-covid-19s-implications-for-private-equity-and-portfolio-companies>

Air passenger transport in March 2020

(% change compared with March 2019)



Note: Only those EU Member States with available March 2020 data

ec.europa.eu/eurostat 

Air transport historic low values

Take-away messages

- Seasonality
- Resilience
- Export of experiences using sustainable mobility
- Integration between more sectors (e.g. health)
- Building trust and confidence
- Build on best practices – CIVITAS DESTINATIONS
- Invest in tourist platforms and social media



Thank you

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