Report 2023

Canary Islands Tourism Sustainability

Tourism Observatory of the Canary Islands

UNWTO INSTO | World Tourism Organization International Network of Sustainable Tourism Observatories

Gobierno de Canarias
Consejería de Turismo y Empleo

Cátedra de Turismo
CajaCanarias-Ashotel
Universidad de La Laguna

ULPGC
Universidad de
Las Palmas de
Gran Canaria | Instituto Universitario de
Turismo y Desarrollo
Económico Sostenible

Tides

This document has been prepared by a research team from the University of La Laguna (ULL) and the University of Las Palmas de Gran Canaria (ULPGC) in the context of the cooperation agreements signed by both universities with the Ministry of Tourism and Employment of the Government of the Canary Islands. These agreements are part of the Canary Islands Tourism Observatory membership of the International Network of Sustainable Tourism Observatories (INSTO) of the World Tourism Organization. On 21st October 2020, at the annual meeting of INSTO, the Canary Islands was declared a new member of the network.

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Presentation

The Canary Islands Tourism Observatory, which reports to the Vice-Ministry of Tourism of the Government of the Canary Islands, is the body responsible for the study, monitoring and analysis of data relating to tourism activity in our Autonomous Region. For this purpose, it has a Tourism Information System which, shared with other public administrations in the Canary Islands, integrates relevant information and information that affects the tourism sector in the Islands and the impact of tourism on the destination. It is a tourism intelligence tool that observes and analyses reality, offering results to all stakeholders in the Canary Islands who are interested.

It is important to highlight that the Canary Islands Tourism Observatory's affiliation with the UNWTO's International Network of Sustainable Tourism Observatories not only demonstrates the Canary Islands' commitment to sustainable development, but also enables us to exchange, contribute to, and learn from other tourist destinations around the globe.

We aim to promote the Tourism Observatory to satisfy the need for information and data intelligence from public and private institutions. This allows for effective decision-making based on scientific knowledge and data, which are crucial for the sustainable policies of the Ministry of Tourism and Employment of the Government of the Canary Islands. We will ensure that the Observatory adheres to conventional academic structures, clear language, and grammatical correctness. Technical term abbreviations will be explained on first use, and hedging will be employed to maintain objectivity. Consistency in style, citation, and formatting features will be maintained. Biased language, filler words, and ornamental language will be avoided to produce concise, logical, and comprehensible texts.
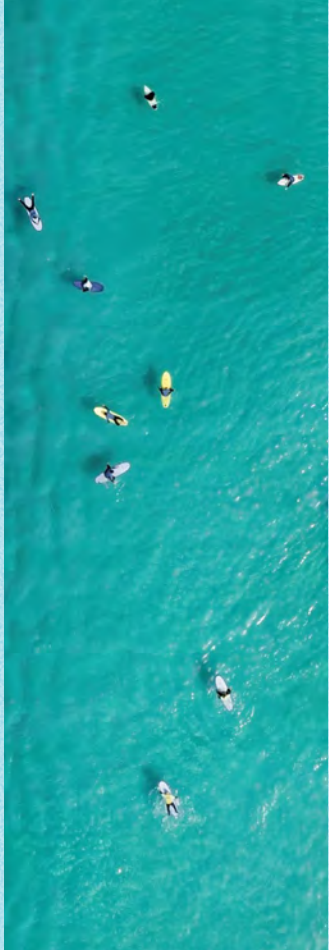
The Canary Islands Tourism Sustainability Report 2023 is an invaluable resource that provides a clear and practical overview of the tourism sector's current state and trends. Its primary aim is to share information with all stakeholders involved in tourism in the Canary Islands and to facilitate a comparison of current conditions with previous periods. The report presents data on various aspects of the tourism industry in an easy-to-understand manner, enabling effective analysis of key trends. To this end, the universities of La Laguna and Las Palmas de Gran Canaria, with the contribution of their research teams, provide the latest accessible data to aid in the formulation of our tourism policies for the foreseeable future.

Jéssica de León Verdugo

Councillor for Tourism and Employment. Government of the Canary Islands

Introduction

This second annual report of the Canary Islands Tourism Observatory, produced in the context of the Canary Islands' participation in the International Network of Sustainable Tourism Observatories (INSTO) of the World Tourism Organization aims to further deepen the monitoring of tourism activity. The Canary Islands face great challenges linked to sustainability in the coming years. The signing of the Glasgow Commitment to decarbonization is one of the most important, but many others, such as the adequate management of waste water to avoid, for example, beach closures; tourist pressure in certain areas, as in the case of La Graciosa islet; the tourist recovery of La Palma after the volcanic eruption; the lack of attractiveness of the sector for many students and workers; the sustainable tourist use of natural spaces, etc., require a great deal of sound information to facilitate informed decision-making. In this way, the report aims to become a reference for public debate in the islands, feeding and nourishing the international debate in the INSTO network itself, in which 38 leading tourism sustainability observatories participate, under the leadership of the World Tourism Organization.

The Canary Islands have had a fast recovery of tourism flows and economy after the pandemic. This is precisely why we must broaden our vision to include social and environmental aspects. Tourism is an activity that takes place outside the usual environment of visitors, in places that are, in turn, the usual environment for residents, workers and businesses. The Tourism Observatory of the Canary Islands understands that tourism must be an activity that promotes the social welfare of the archipelago and that to achieve this objective it is necessary to manage tourism through the instruments of tourism policy, such as regulation, incentives or the provision of certain services. But these management decisions must be based on extensive and rigorous information. The involvement of all stakeholders, public, private and NGOs, is a key element in the good governance of tourism information. Moreover, tourism is related to the different levels of public administration and to almost all the departments that make it up (employment, training, infrastructures, culture, education, environment, etc.). Therefore, the coordinated effort of the private, public and citizen sectors is essential in order to achieve shared long-term sustainability objectives.

The report provides an overview of the key areas of sustainability, taking into account available sources and with a view to improving this information and measuring what matters. To the extent that the reader detects and reports inaccuracies or lack of information, this will serve as a spur to further improve the tourism sustainability information system. The work has been carried out by a research team from the Canary Islands' public universities with the aim of making the information offered to the public more rigorous and independent and with a view to making the Canary Islands Tourism Observatory a reference both within the islands and on an international scale.
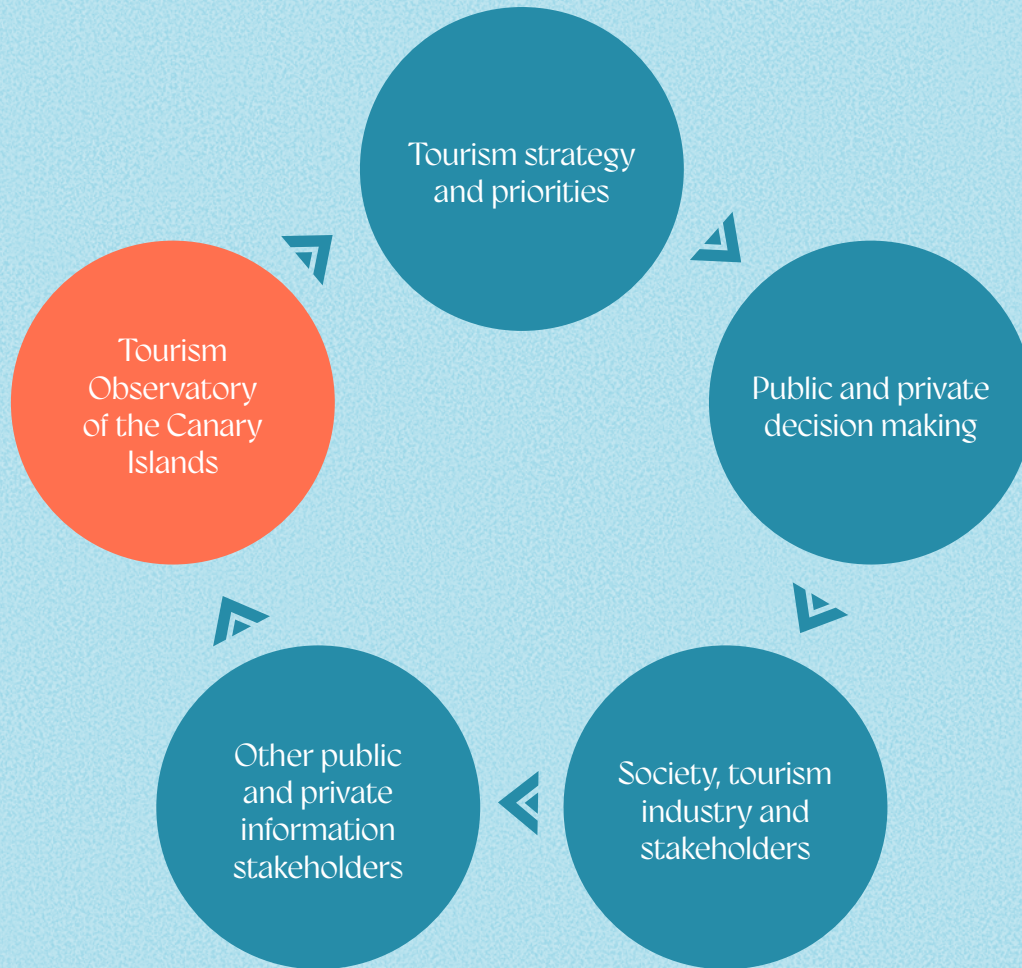
Executive summary

The Canary Islands joined the UNWTO International Network of Sustainable Tourism Observatories in October 2020. The Canary Islands Tourism Observatory aims to promote the sustainability of the destination, improving the measurement and monitoring of key indicators in order to support decision-making.

1. The Canary Islands have experienced in 2022 and 2023 a strong recovery in tourism flows compared to pre-pandemic figures. However, in 2022 the main aggregate tourism indicators, tourist arrivals, tourist overnight stays in hotels and apartments and tourism expenditure were still below the 2019 figures. The exception would be ADR (average daily rate) and RevPAR (revenue per available room) which did exceed pre-pandemic levels in 2022. During 2023 the tourism market indicators continue to show sustained growth exceeding pre-pandemic levels. Now that the economic figures for the sector have recovered, it is time to analyse the evolution in terms of sustainability.

2. Inflation has been a factor that has affected the growth of magnitudes expressed in monetary terms, such as tourism expenditure, which must be expressed in real terms in order to better understand the reality. In addition, inflation has generated an increase in costs for many companies in the sector.

3. The recovery of tourism flows post-pandemic is evident in all the islands except La Palma, which continues to suffer the effects of the volcanic eruption and, particularly, the effects of gas emissions leading to the closure of establishments and the loss of connectivity to the island. This recovery is observed in 2022 and in 2023 it is confirmed and consolidated, surpassing the 2019 records in almost all the main indicators of visitor flow and expenditure.

4. In 2023 Lanzarote was declared a "touristically saturated island", which calls for a reflection on the extent to which the origin of this declaration lies in exceeding certain limits and/or in the deficits of the tourism management carried out. This debate would be helped by the availability of comparable sustainability indicators.

5. There are no indicators available in the Canary Islands that make it possible to ascertain residents' perceptions of tourism. There is a need for a systematic and rigorous measurement of perceptions in order to know the perspective of residents.

6. Despite the notable reduction in unemployment rates in the Canary Islands, the islands continue to show very negative records in terms of unemployment and poverty. This contrast with a comparative analysis carried out by Eurostat that reveals among European regions with a greater specialization in tourism a general tendency is for their unemployment rates to be lower than the average for their country.

7. Holiday homes and their regulation continue to be key issues in the Canary Islands. Despite the improvement in the information available, there is a need for more information and a search for consensus in order to make the right policy decisions.

8. The islands are suffering tensions in their basic infrastructures: energy shortages, water shortages, wastewater discharges, traffic congestion, forest fires, etc., which may endanger tourist activity.

9. As pointed out in last year's report, tourism stakeholders and society as a whole require more accurate and rigorous information on water consumption in tourism, greenhouse gas emissions from the sector, waste generation, wastewater treatment, quality of employment, tourism training, accessibility of the sector for people with reduced mobility, etc.

10. The sector faces numerous challenges both from the perspective of resident satisfaction and from the perspective of the application of the new requirements arising from the process of decarbonization of air transport sponsored by the European Union in the Canary Islands. In order to take the right strategic decisions in the near future, relevant and rigorous information is needed, as well as coordination and cooperation between agents to favour decision-making based on proven data and measures that can be monitored over time.

The observatory

Context of the Tourism Observatory of the Canary Islands
The role of the Observatory in the tourism knowledge system of the Canary Islands

- Tourism strategy and priorities
- Tourism Observatory of the Canary Islands
- Public and private decision making
- Other public and private information stakeholders
- Society, tourism industry and stakeholders

Structure of the Canary Islands Tourism Observatory
Design of the Tourism Observatory of the Canary Islands

- Vice Ministry of Tourism
- Islands, municipalities and stakeholders
- Tourism Observatory of the Canary Islands
- Promotur
- Public Universities
- Institute of Statistics of the Canary Islands
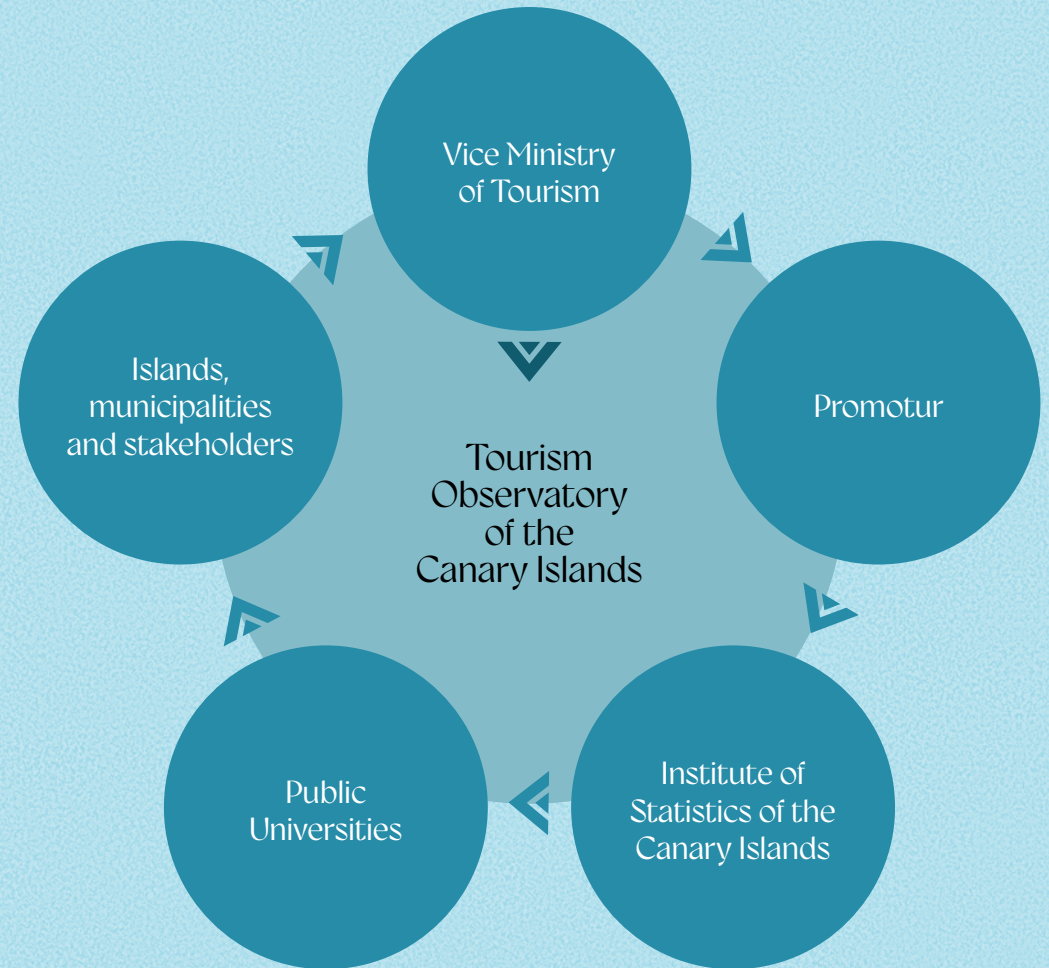
Inter-university research team meeting.
Gran Canaria, September 2023.

The Councillor for Tourism and Employment of
the Canary Islands Government, Jéssica de León.

Presentation of the report of 2022.
Tenerife, December 2022.

Report 2022.
Sustainability of Tourism in the Canary Islands.

INSTO Observatories Meeting. Madrid
(UNWTO headquarters), 2023.

INSTO Observatories Meeting. Madrid
(UNWTO headquarters), 2023.

2

Datos básicos para conocer el destino

- Archipelago: Eight islands in the Atlantic Ocean

- Outermost region of the European Union

- Autonomous Region of Spain.

- Located 1,300 km from the Iberian Peninsula and very close to the African coast (about 100 km).

- The Canary Islands are the largest of the four inhabited archipelagos of the Macaronesia and also the most easterly.

- Area: 7,447 km^2.

- Population: 2,177,701 (INE, 2022). High population density and high degree of urbanization.

- Tenerife and Gran Canaria are the two most populated islands, each accounting for around 40% of the total population.

Foreign and mainland tourist arrivals in 2022: 14.6 million. 87% of tourists come from other countries and 13% from mainland Spain. The annual minimum during the pandemic was 4.6 million (2020) and the latest pre-pandemic figure was 15.1 million (2019) (FRONTUR-Canarias).

From an environmental point of view, the Canary Islands can be considered a unique territory in the world:

Mild climatic conditions: the average daytime temperature in winter is 22.1°C and 26°C in summer. The archipelago enjoys a mild winter with average temperatures between 18°C and 25°C.

Volcanic origin: The Canary Islands are a volcanically active archipelago. Recent eruption on the island of La Palma in 2021.

Environmental richness and great variety of habitats: almost half of the Canary Islands territory (46.74%) corresponds to protected natural areas. Among the 15 regions richest in biodiversity on the planet.

Varied and contrasting landscape: Lanzarote and Fuerteventura, the easternmost islands, are arid; the westernmost islands are mountainous and green.

The role of tourism in the destination

Tourism is the main economic activity on the islands with some 15 million tourists per year before the pandemic. By 2022, the figures reach again 14.6 million tourists: 12.6 million international and 1.9 million from mainland Spain. United Kingdom (34%), Germany (16%), mainland Spain (13%) and the Nordic countries (8%) (ISTAC, 2022). Average expenditure per tourist: €1,314.23 (ISTAC, 2022).

The three main reasons for tourists to choose the Canary Islands are climate, security and tranquillity. 50% of tourists who visit the Canary Islands say that the main motivation for their holidays is to rest, 20% to explore or get to know the islands and 16% to enjoy their family (ISTAC, 2022).

Leadership in tourism figures among European regions. The highest number of overnight stays in tourist accommodation in 2019 (96.1 million). In 2022, overnight stays reached 86.7 million (ISTAC, 2022).

Since the 1960s, tourism has experienced rapid growth. The Canary Islands have followed a **model of mass tourism** supported by international tour operators, which continue to have a relevance in the Islands that has been lost in other continental European sun and beach destinations.

High percentage of **all-inclusive** and low expenditure other than on **transport and accommodation.**

High average rating of 8.85/10 of the tourist experience in the Islands (ISTAC, 2022). There is a high percentage of **repeat visitors**. The main attractions of the Canary Islands are its climate and its landscapes, which means there are practically no problems of seasonality.

The Canarian tourism model is strongly **resource-based and does not rely sufficiently on skilled labour and tourism intelligence.** As a result, tourism has not had sufficient knock-on effects on other economic activities, nor has it had sufficient impetus to significantly reduce poverty in the islands.
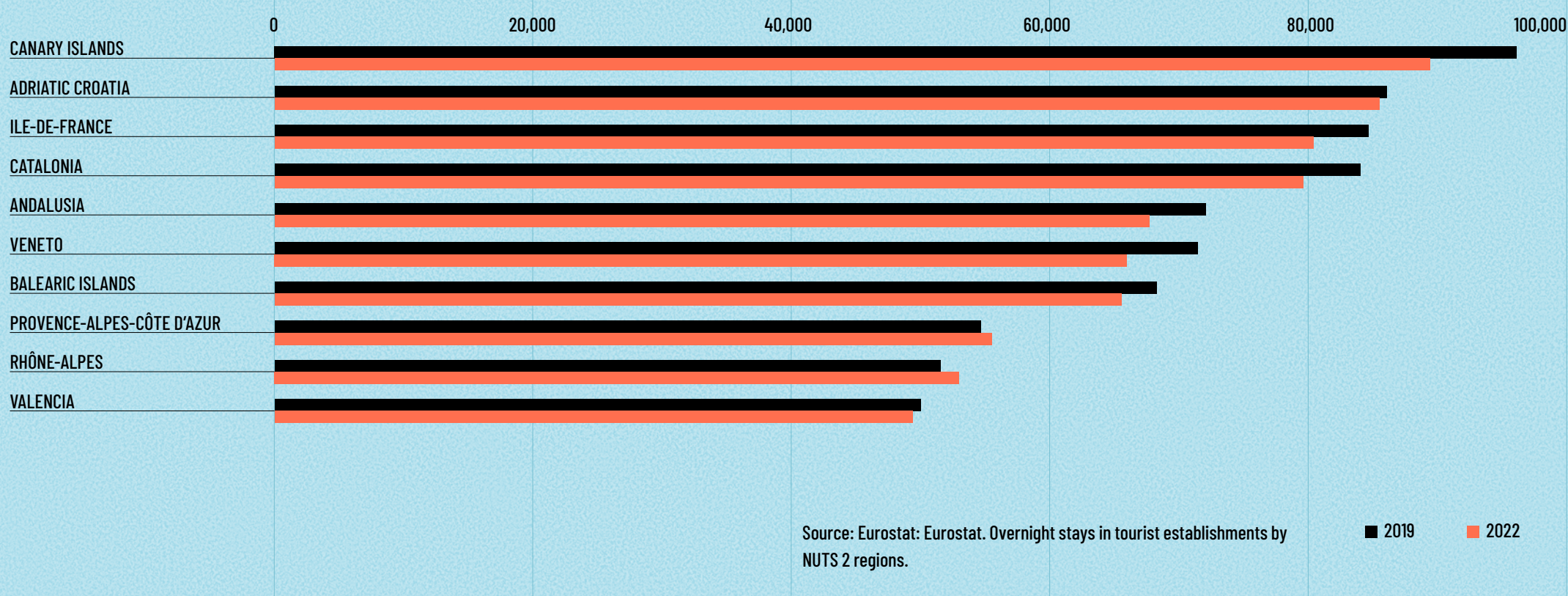
The Canary Islands maintain **very high unemployment rates** in the European context despite being the leading region in the European Union in terms of the number of overnight stays in tourist establishments.

Poor coordination between institutions, departments and between the public and private sectors.
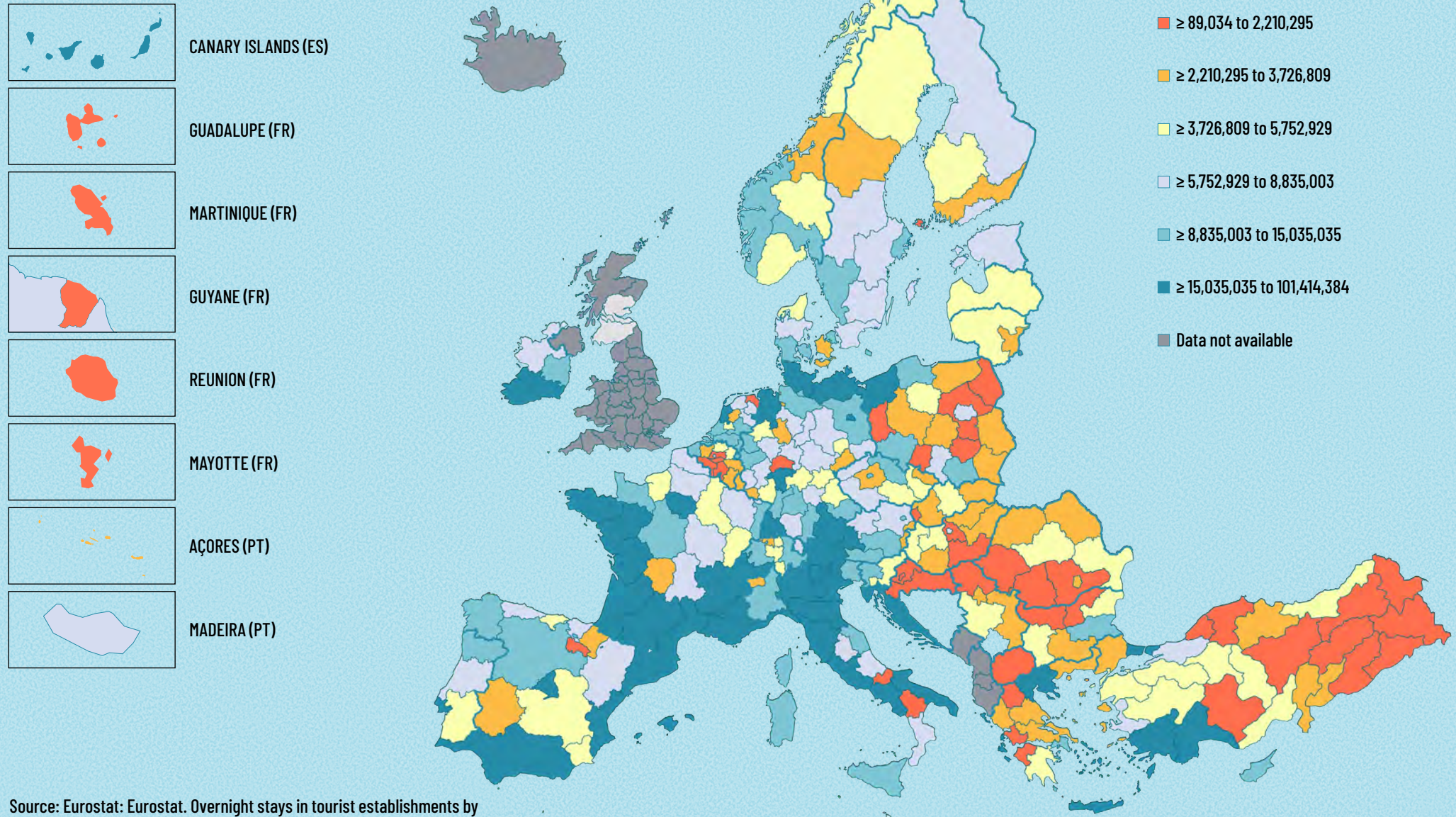
Relevance of the Canary Islands as a destination in the EU context

In 2022, the Canary Islands reached 89.2 million overnight stays, regaining the leading position among European NUTS 2 regions (Eurostat, 2023). While in 2019 the Canary Islands was already the leading European Union (EU) region in this indicator (96.1 million overnight stays) (Eurostat, 2021), the pandemic period altered this ranking. In this period of recovery, it is important to highlight the case of a competitor region outside the EU, the Antalya region in Turkey, which has been registering remarkable growth, rising from 94.9 million overnight stays in 2019 to 101.4 million in 2022 (Eurostat, 2023).

EU regions with the highest number of overnight stays in 2019 and 2022 (million overnight stays)

Source: Eurostat: Eurostat. Overnight stays in tourist establishments by NUTS 2 regions.

■ 2019   ■ 2022

Overnight stays in tourist establishments (2022)

CANARY ISLANDS (ES)	
GUADALUPE (FR)	
MARTINIQUE (FR)	
GUYANE (FR)	
REUNION (FR)	
MAYOTTE (FR)	
AÇORES (PT)	
MADEIRA (PT)	

Legend:
- ≥ 89,034 to 2,210,295
- ≥ 2,210,295 to 3,726,809
- ≥ 3,726,809 to 5,752,929
- ≥ 5,752,929 to 8,835,003
- ≥ 8,835,003 to 15,035,035
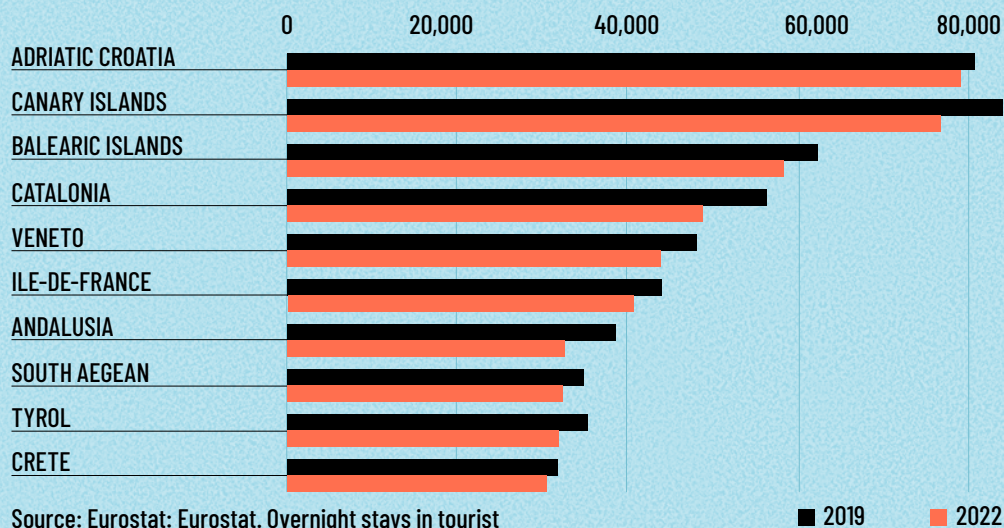- ≥ 15,035,035 to 101,414,384
- Data not available

Source: Eurostat: Eurostat. Overnight stays in tourist establishments by NUTS 2 regions.

The position of tourism leadership in terms of arrivals and overnight stays in the European context must now be transferred to the field of sustainability.

On an island and outermost territory, the Canary Islands must face the social and environmental challenges in tourism management associated with a high volume of tourist overnight stays per 1,000 inhabitants (39,635); a high volume of overnight stays per square kilometre (11,986.98) and a high number of international overnight stays (76.6 million in 2022). In this sense, the Canary Islands show unique conditions compared to the rest of the regions of high tourist affluence in the EU.

NUTS 2 regions with the highest number of overnight stays per 1,000 inhabitants in 2019 and 2022
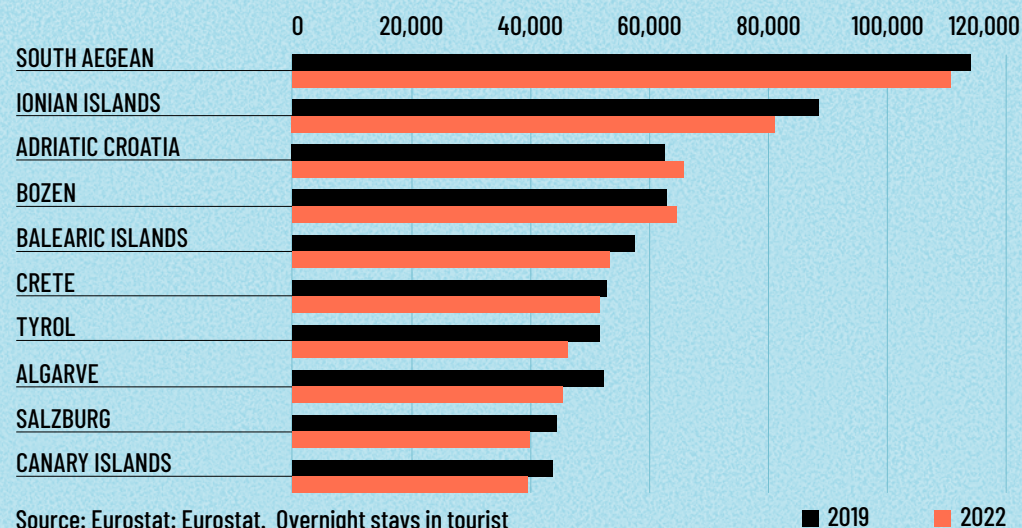
Source: Eurostat: Eurostat. Overnight stays in tourist establishments by NUTS 2 regions.

■ 2019 ■ 2022

EU regions with the highest number of international overnight stays in 2019 and 2022 (million overnight stays)
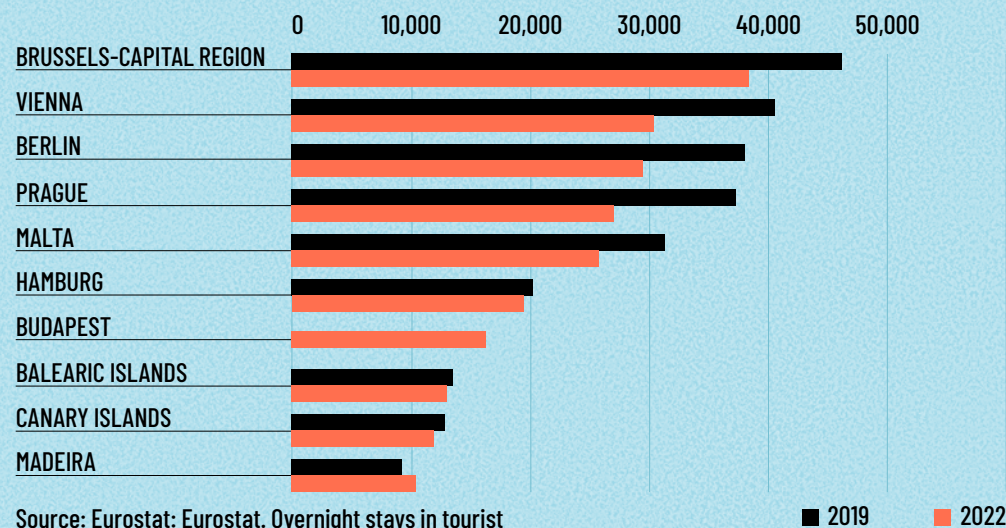

Source: Eurostat: Eurostat. Overnight stays in tourist establishments by NUTS 2 regions.

■ 2019 ■ 2022

NUTS 2 regions with the highest number of overnight stays per square kilometre in 2019 and 2022

Source: Eurostat: Eurostat. Overnight stays in tourist establishments by NUTS 2 regions.

■ 2019 ■ 2022

Overnight stays per 1,000 inhabitants in 2022

Legend (regions):
- CANARY ISLANDS
- GUADALUPE (FR)
- MARTINIQUE (FR)
- GUYANE (FR)
- REUNIÓN (FR)
- MAYOTTE (FR)
- AÇORES (PT)
- MADEIRA (PT)

Legend (values):
- ≥ 297.75 to 1,558.22
- ≥ 1,558.22 to 2,838.18
- ≥ 2,838.18 to 4,091.82
- ≥ 4,091.82 to 6,219.7
- ≥ 6,219.7 to 9,517.89
- ≥ 9,517.89 to 110,406.49
- Data not available
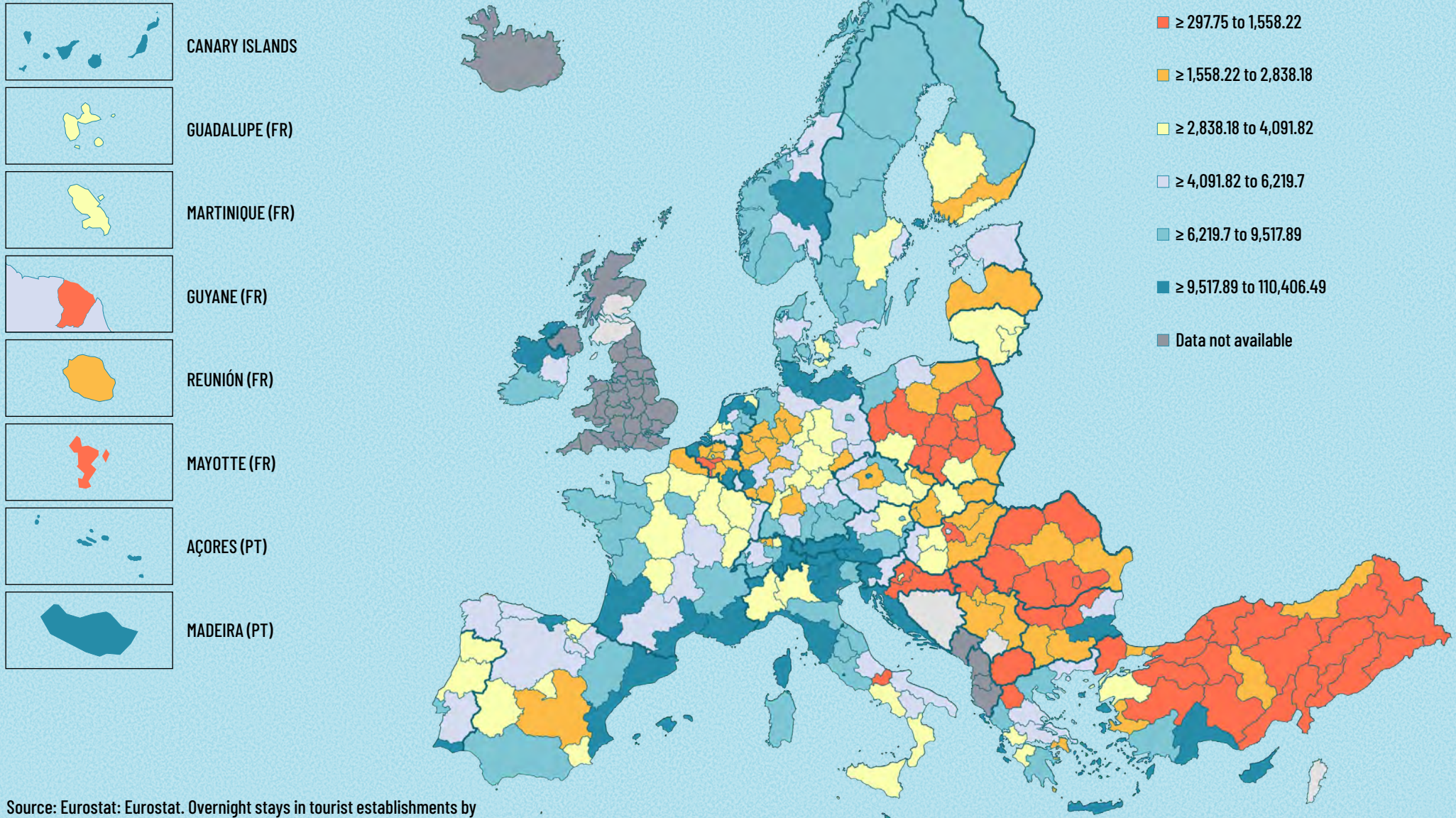
Source: Eurostat: Eurostat. Overnight stays in tourist establishments by NUTS 2 regions.

Overnight stays per km² in 2022

CANARY ISLANDS (ES)

GUADALUPE (FR)

MARTINIQUE (FR)

GUYANE (FR)

REUNIÓN (FR)

MAYOTTE (FR)

AÇORES (PT)

MADEIRA (PT)

- ≥ 2.52 to 125.61
- ≥ 125.61 to 285.75
- ≥ 285.75 to 590.69
- ≥ 590.69 to 1,004.64
- ≥ 1,004.64 to 2,157.95
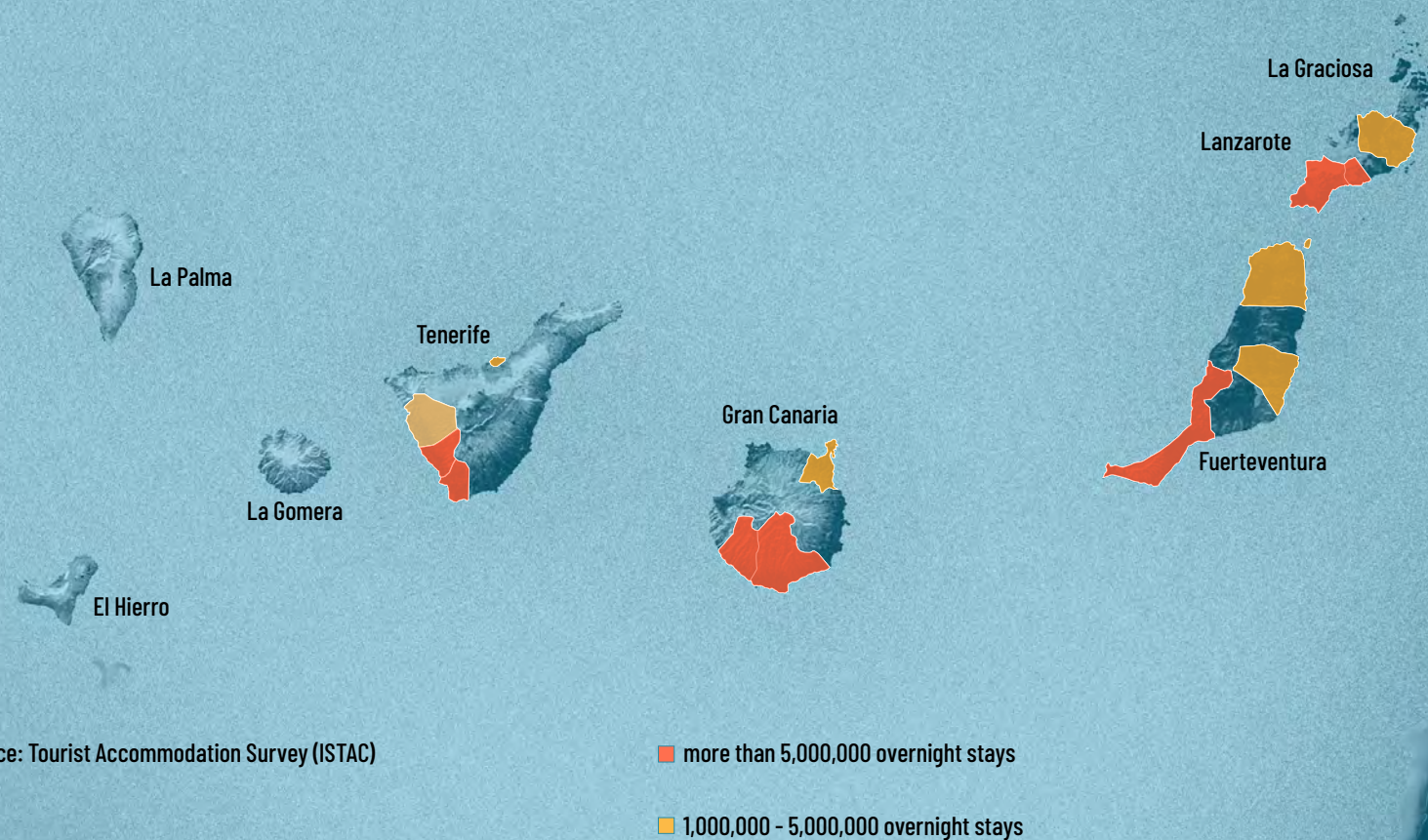- ≥ 2,157.95 to 38,399.95
- Data not available
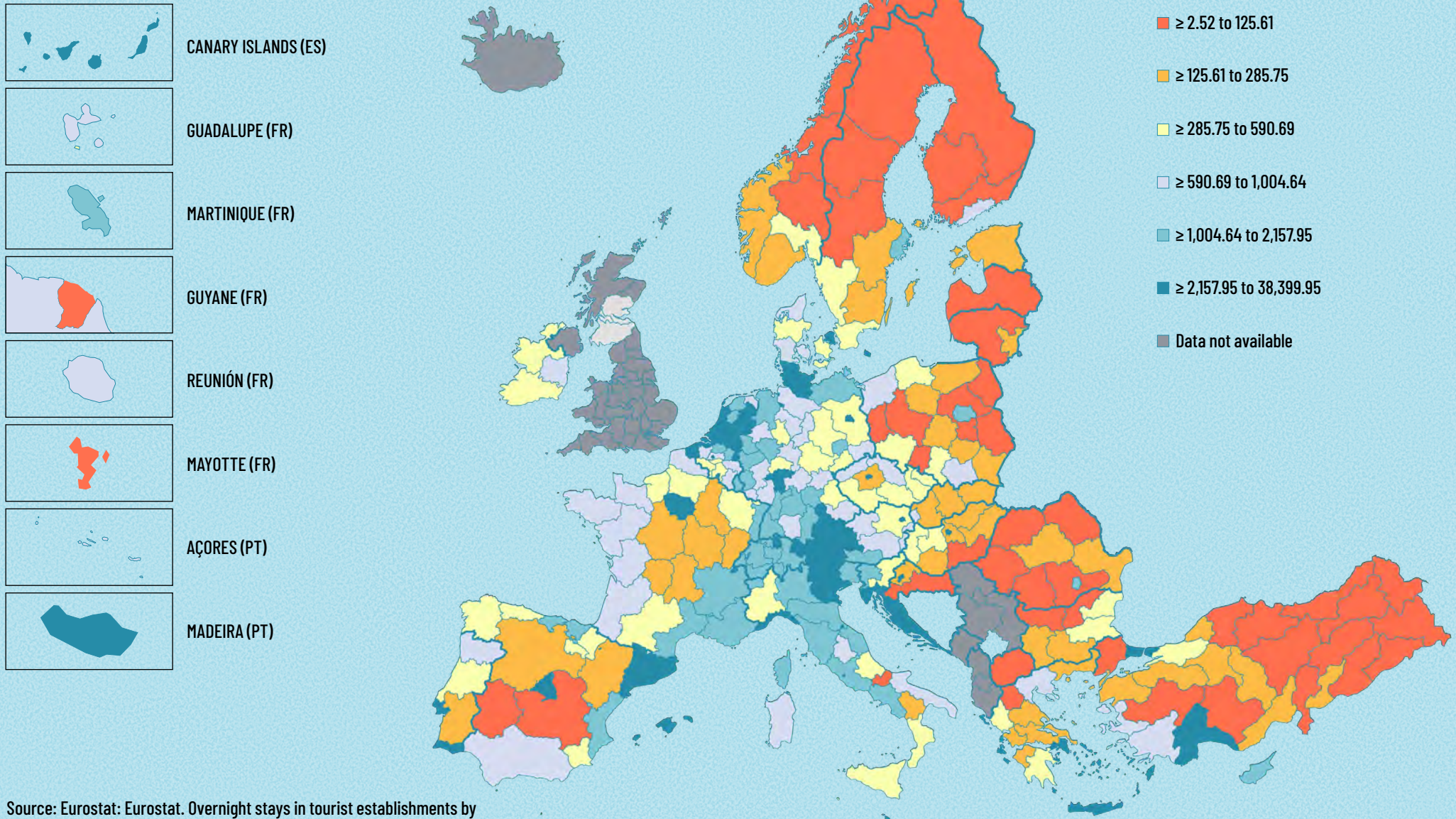
Source: Eurostat: Eurostat. Overnight stays in tourist establishments by NUTS 2 regions.

A tourism model characterized by specialization

In 2022, 14 of the 88 municipalities accounted for 93.5% of overnight stays in hotels and apartments in the Canary Islands: 81.1 million overnight stays out of a total of 86.7 million. Seven of the 88 municipalities registered more than 5,000,000 overnight stays in 2022: San Bartolomé de Tirajana, Adeje, Arona, Pájara, Tías, Mogán and Yaiza, in that order. These municipalities accounted for 78.14% of overnight stays in hotels and apartments in that year. In the case of holiday homes, the concentration of supply is not as high. Forty-three percent of the holiday homes detected by the INE in the Canary Islands are located in these municipalities. In any case, the data on the concentration of accommodation should be qualified by taking into account, for example, information on mobility. In 2022, 49% of tourists reported having travelled around the island on their own. In reality, the concentration increases if tourism is analysed at the scale of local tourist destinations (micro-destinations for the ISTAC).
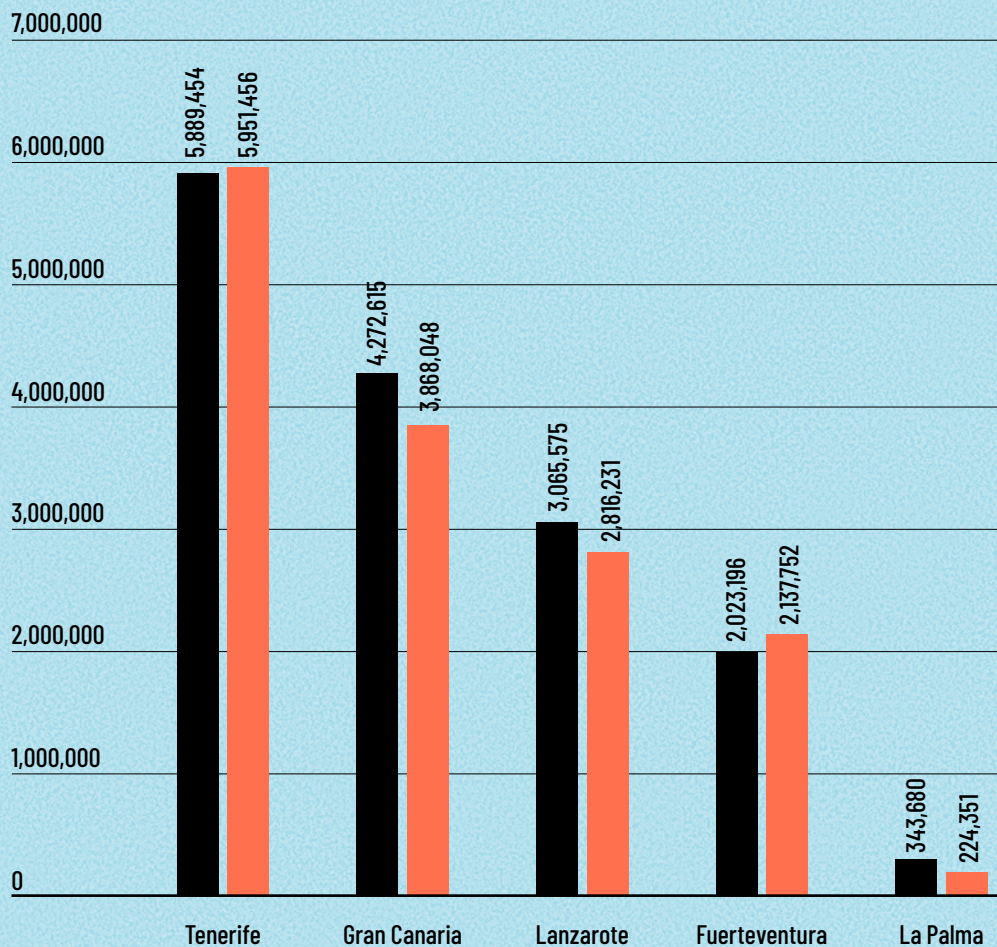
Concentration of overnight stays in the main tourist municipalities of the Canary Islands in 2022

Source: Tourist Accommodation Survey (ISTAC)

■ more than 5,000,000 overnight stays

■ 1,000,000 - 5,000,000 overnight stays

The recovery of tourism flows after the pandemic

Tourist arrivals 2019-2022

	Tenerife	Gran Canaria	Lanzarote	Fuerteventura	La Palma
2019	5,889,454	4,272,615	3,065,575	2,023,196	343,680
2022	5,951,456	3,868,048	2,816,231	2,137,752	224,351

Source: FRONTUR-Canary Islands (ISTAC)

■ 2019　■ 2022

Tourist arrivals 2023 Jan-Aug vs 2019 Jan-Aug

	Tenerife	Gran Canaria	Lanzarote	Fuerteventura	La Palma
2019 Jan-Aug	3,958,474	2,803,604	2,082,591	1,365,599	232,939
2023 Jan-Aug	4,270,879	2,758,590	2,077,695	1,539,222	137,117
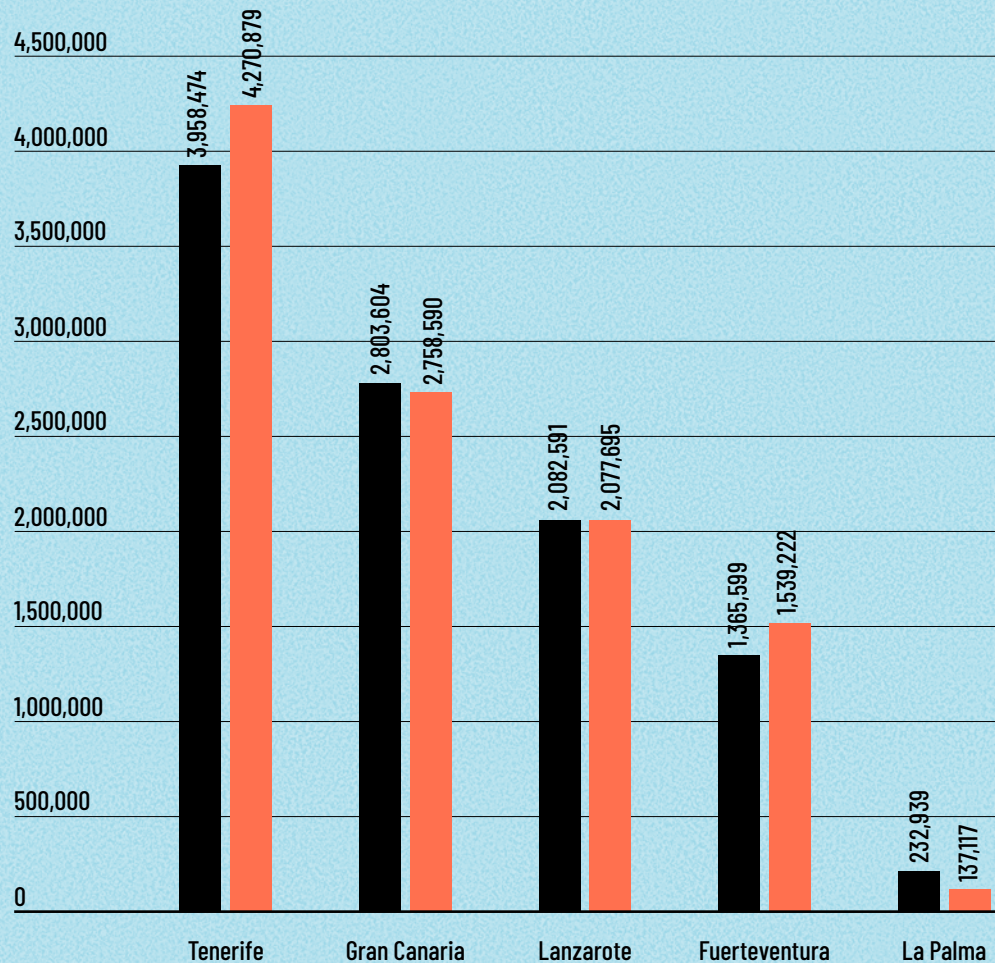
Source: FRONTUR-Canary Islands (ISTAC)

■ 2019 Jan-Aug　■ 2023 Jan-Aug

Tourist arrivals to the Canary Islands (main countries) (2019)

10% Nordic Countries

13% Spain (excluding Canary Islands)

27% Others

3% Italy

4% Nordic Countries

4% France

3% Belgium

2% Switzerland

8% Rest of the countries

4% Ireland

33% United Kingdom

18% Germany
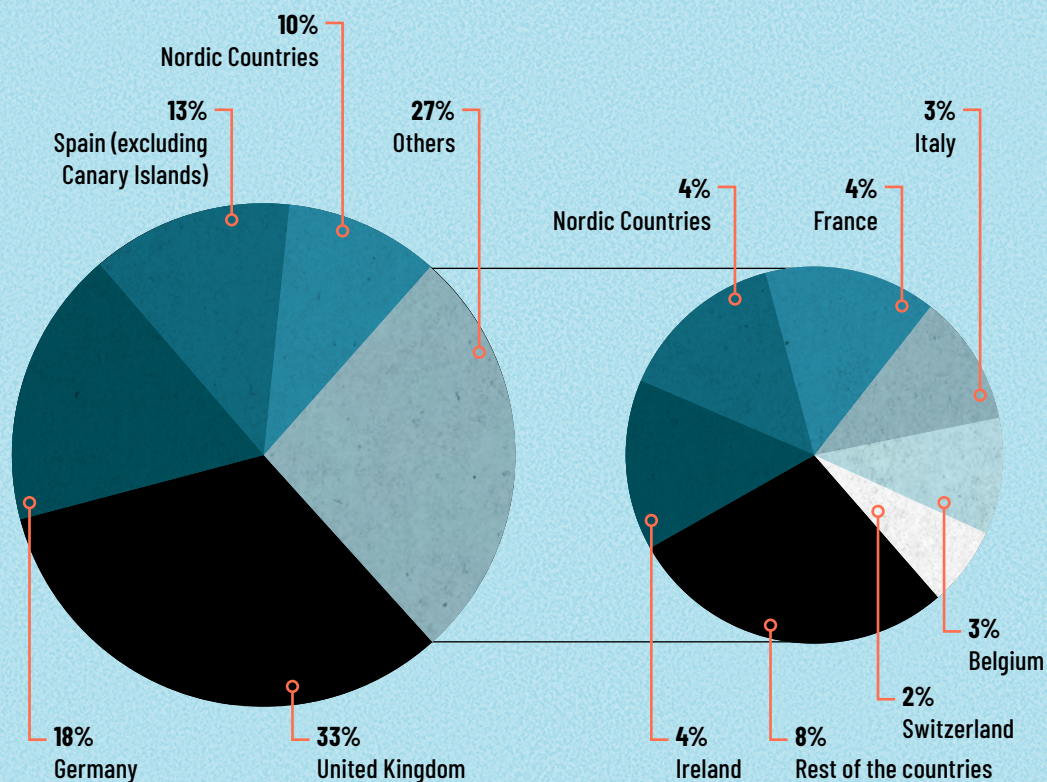
Source: FRONTUR-Canary Islands (ISTAC)

Tourist arrivals in the Canary Islands (main countries) (2022)

8% Nordic Countries

13% Spain (excluding Canary Islands)

29% Others

4% Ireland

4% Nordic Countries

4% Italy

3% Belgium

1% Switzerland

8% Rest of the countries

5% France

34% United Kingdom

16% Germany
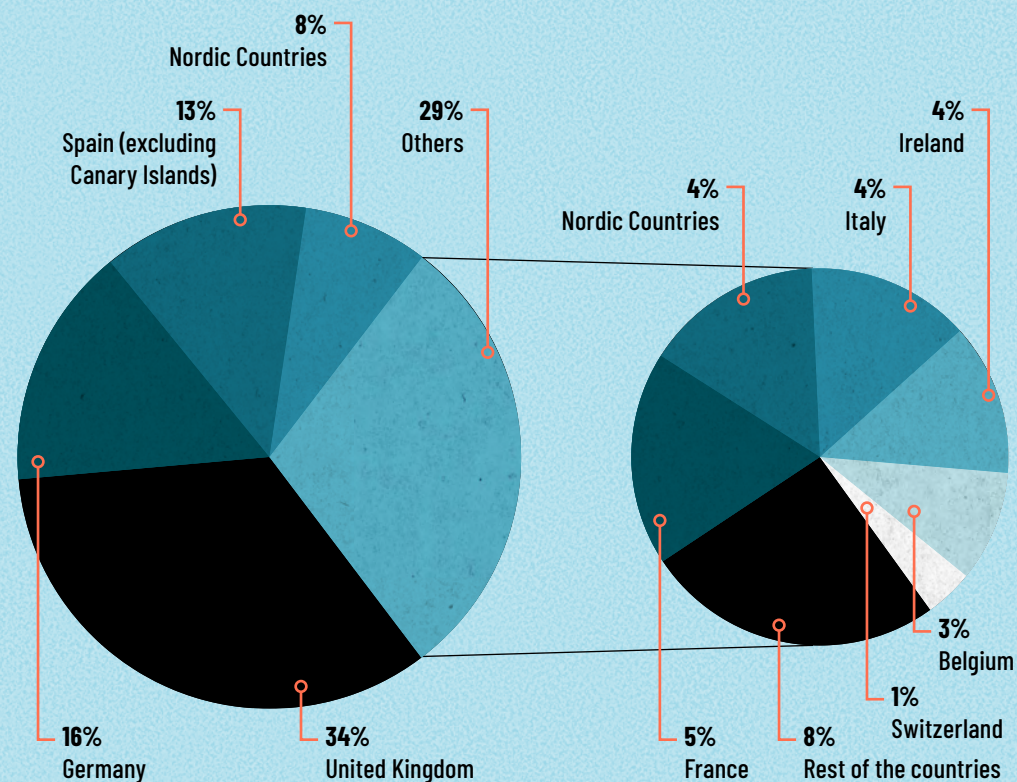
Source: FRONTUR-Canary Islands (ISTAC)

Throughout 2023, it can be said that the Canary Islands have recovered and surpassed pre-pandemic tourism flows. The pre-pandemic years of 2018 and 2019 were excellent. In the post-pandemic period, 2022 was the year of recovery, but there were still some signs of weakness, as in the case of the British market which, during the first quarter of that year, was still suffering restrictions due to the appearance of variants of COVID-19. In 2022, the recovery of arrivals from Lanzarote and Gran Canaria compared to pre-pandemic figures had not yet been achieved. However, in the first 8 months of 2023, very intense growth can be observed on these two islands. In the case of La Palma, the effects of volcanic gas emissions and the closure of places are still being felt, so that after the poor data for 2022, foreign and mainland tourists fell by a further 5% in the first 8 months of 2023.
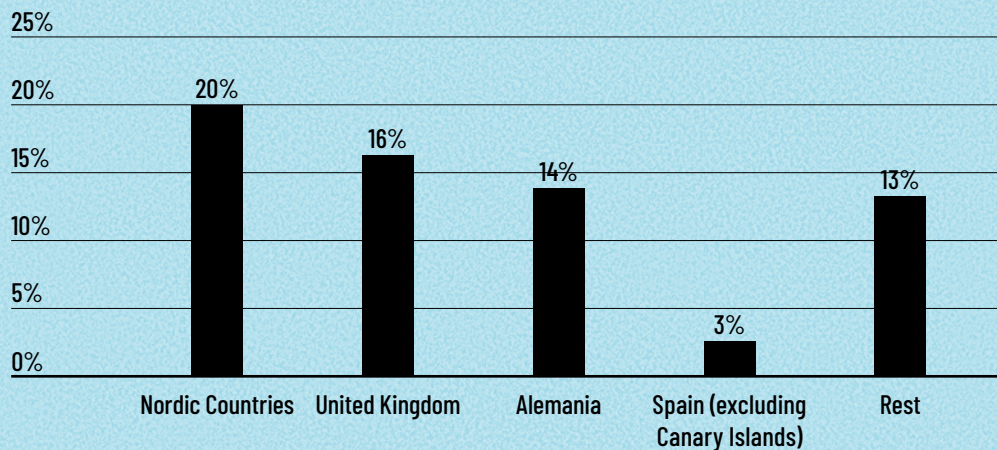

Percentage change in mainland and foreign tourist arrivals (2022 compared to 2019)
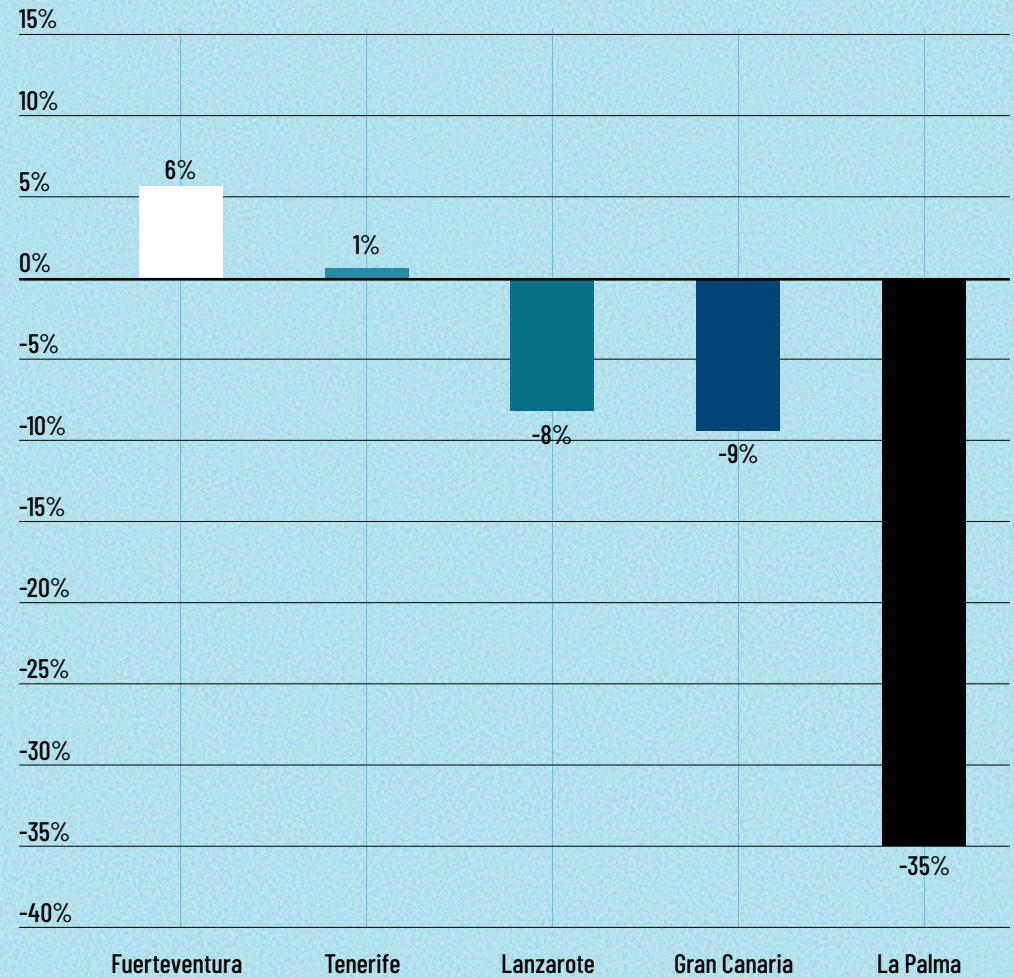
Source: FRONTUR-Canary Islands (ISTAC). Includes mainland Spain and abroad

Year-on-year change in tourist arrivals by nationality (cumulative Jan-Aug, 2023)

Nationality	Change
Nordic Countries	20%
United Kingdom	16%
Alemania	14%
Spain (excluding Canary Islands)	3%
Rest	13%

Source: FRONTUR-Canary Islands (ISTAC)

## Year-on-year change in foreign and mainland tourist arrivals (cumulative Jan-Aug, 2023)

Island	Change
Tenerife	12%
Gran Canaria	15%
Lanzarote	15%
Fuerteventura	15%
La Palma	-5%
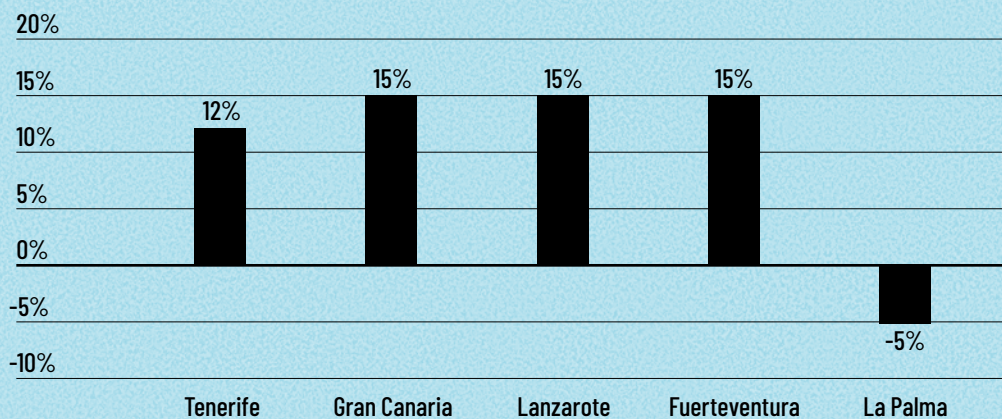
Source: FRONTUR-Canary Islands (ISTAC)

Tourism recovery, 2022 vs. 2019

Indicators	2019	2022	Source
Tourism GDP	33% (Spain: 12.4%)	35.5% (Spain: 11.9%)	IMPACTUR, Exceltur y Gobierno de Canarias
Average expenditure			
Daily expenditure per tourist	€137.45	€160.53	Tourism Expenditure Survey (ISTAC)
Expenditure per tourist and trip	€1,122.58	€1,314.14	
Accommodation (hotels and apartments)			
Available bed places	395,016	349,350	Tourist Accommodation Survey (ISTAC)
Annual overnights	97,964,361	86,708,053	
Occupancy rate (by room)	77.44%	75.31%	
ADR - RevPar	€85.17 - €65.96	€102.50 - €77.19	
Average length of stay	7.45	6.96	
Tourist arrivals			
International (value and % annual change)	13,147.474	12,694,329 (-3.45%)	FRONTUR-Canarias (ISTAC)
Mainland Spain (value and % annual change)	1,968,234	1,923,053 (-2.30%)	
Total (value and % annual change)	15,115,709	14,617,383 (-3.30%)	

Evolution of international tourist arrivals (index 100 in base year 2010)

Legend: Mundo, Spain, Canary Islands
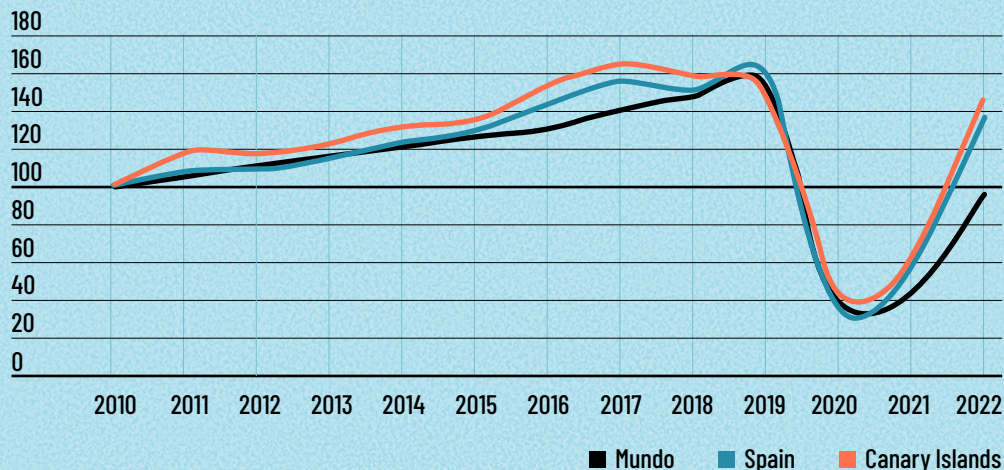
Source: FRONTUR-Canarias (ISTAC) / INE / OMT

Aggregate tourism expenditure at constant prices. Variation compared to the same quarter of 2019

Values by quarter:
- 2020 Q1: -6%
- 2020 Q2: -100%
- 2020 Q3: -80%
- 2020 Q4: -85%
- 2021 Q1: -87%
- 2021 Q2: -76%
- 2021 Q3: -46%
- 2021 Q4: -19%
- 2022 Q1: -4%
- 2022 Q2: 5%
- 2022 Q3: 5%
- 2022 Q4: 3%
- 2023 Q1: 31%
- 2023 Q2: 1%

Source: Tourism Expenditure Survey (ISTAC)

Annual GDP growth rate in 2021 in volume terms

- EU-27: 5.4%
- Spain: 5.5%
- Canary Islands: 7.0%
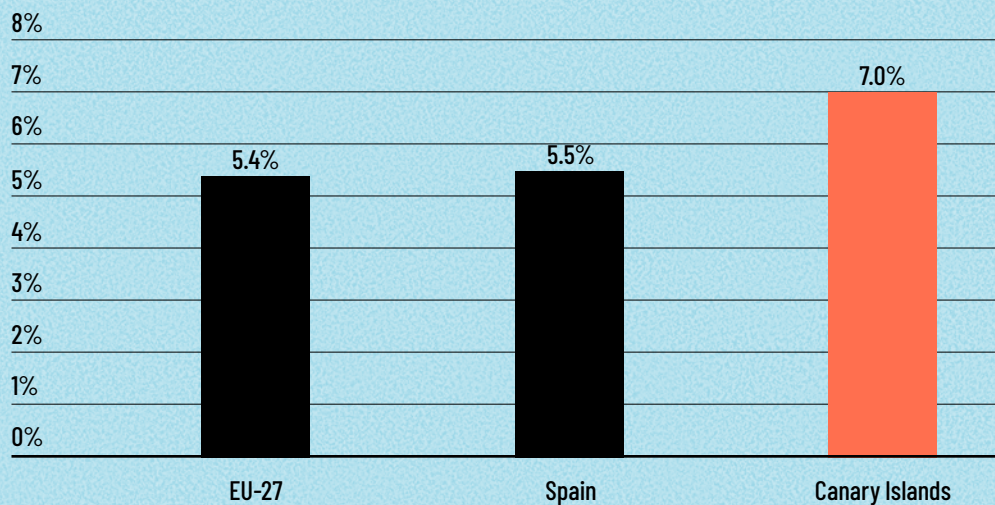
Source: Spanish Regional Accounts (INE) and Eurostat.
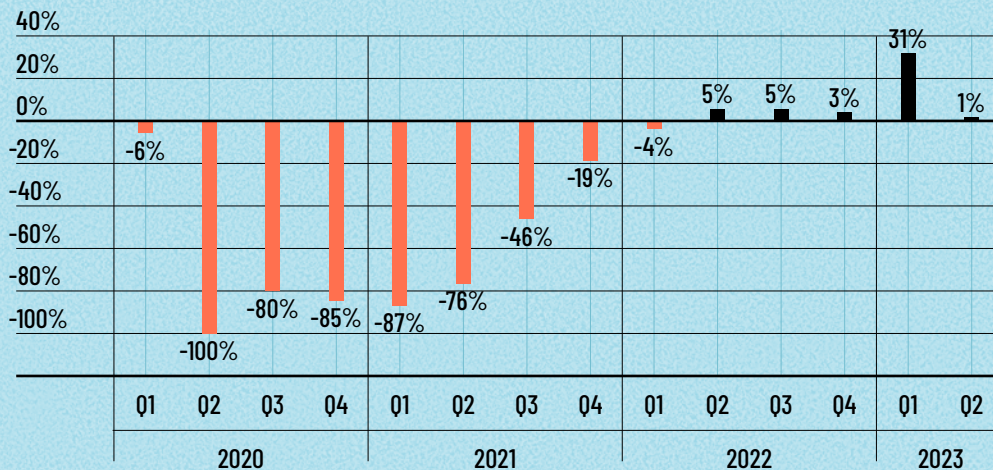
Monthly international tourist arrivals to the Canary Islands (Jan-2016 to Aug-2023)
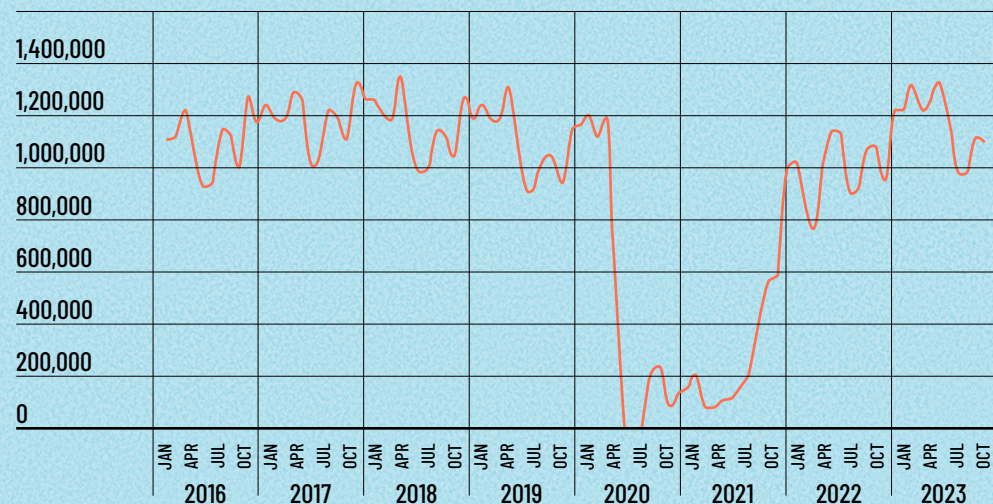
Source: FRONTUR-Canarias (ISTAC)

The recovery of arrivals according to autonomous region of origin

Variation in the number of tourists arriving in the Canary Islands by Autonomous Community of origin (2022 – 2019)T

|	Tourists 2022	% of total	Var.% (2022-2019)
Spain (excluding Canary Islands)	**1,712,752**	**100%**	**-3%**
Madrid	490,758	29%	-14%
Catalonia	266,857	16%	-5%
Andalusia	191,767	11%	-11%
Basque Country	133,157	8%	-27%
Valencia	130,450	8%	129%
Galicia	115,830	7%	73%
Castille and Leon	81,130	5%	-9%
Castille-La Mancha	60,381	4%	-13%
Rest of Spain (excluding Canary Islands)	242,424	14%	3%

Note: In 2022, tourists from mainland Spain accounted for 13% of the total.
Source: Tourism Expenditure Survey / Annual series of tourism micro-markets in Spain (ISTAC).

Mainland Spain tourists arriving in the Canary Islands and their expenditure

■ Travel   ■ Total spending at constant rates from 2022
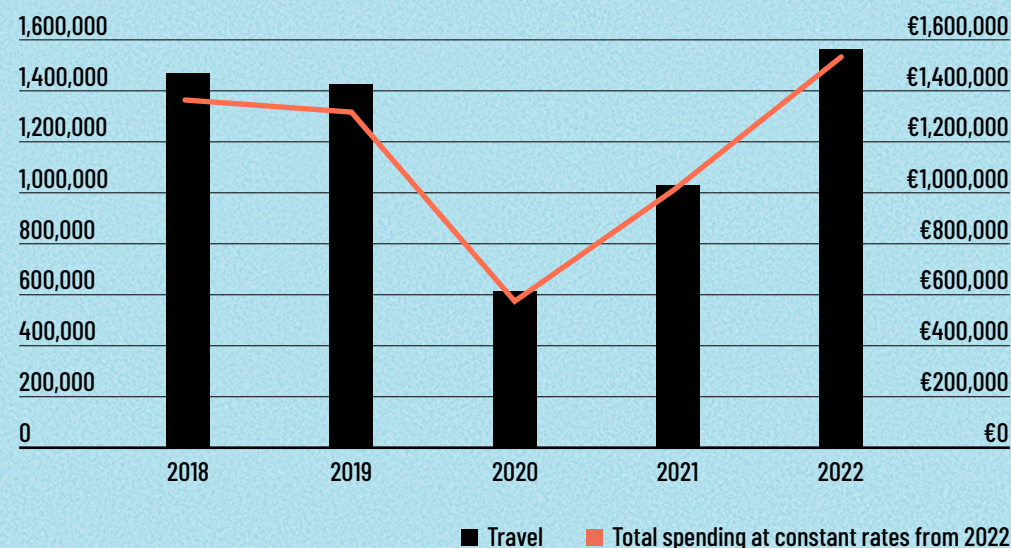
Source: Resident Tourism Survey (INE)

The data reflect a significant recovery of mainland Spain tourists in the Canary Islands. Frontur–Canarias offers an estimate of more than 1.9 million mainland Spain tourists in 2019, which would be maintained in 2022 at approximately these levels, rising subsequently in 2023. The Canary Islands Tourism Expenditure Survey offers a slightly lower estimate of 1.7 million, with a breakdown by region of residence dominated by Madrid, Catalonia, Andalusia and the Basque Country. For its part, the INE's Resident Tourism Survey gives a figure for 2022 of almost 1.6 million mainland Spain tourists, who made an aggregate expenditure of almost €1.4 billion in the archipelago, figures that exceed pre-pandemic levels.

Tourism situation
January–August 2023

The cumulative total of tourist arrivals to the Canary Islands has increased steadily since 2020, a year marked by the decrease in tourist arrivals due to the impact of COVID–19. During the period from January to August 2023, there has been an increase of 13.11% in tourist arrivals compared to the same period in 2022 (indicated by the dashed line in the graph).

Passenger arrivals at Canary Island airports have increased progressively with respect to 2020. In the period from January to September 2023, the cumulative total of these arrivals rose by 13.49% compared to the same period in 2022 (indicated by the dashed line in the graph).

Arrivals from mainland Spain and foreign tourists to the Canary Islands

International passenger arrivals at Canary Island airports
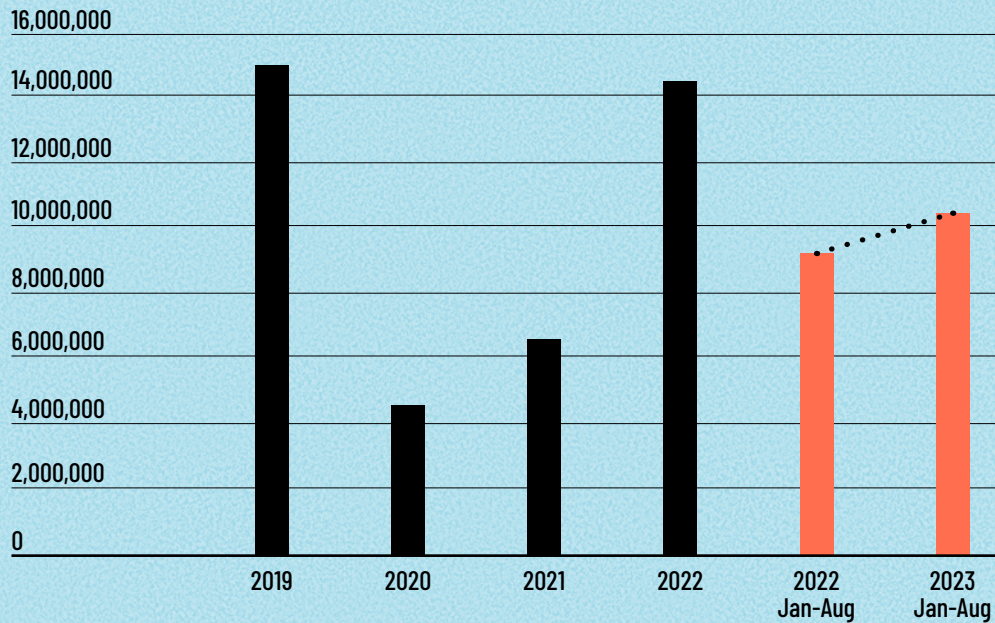
Source: Statistics on Tourist Movements at Canary Islands Borders. (ISTAC)
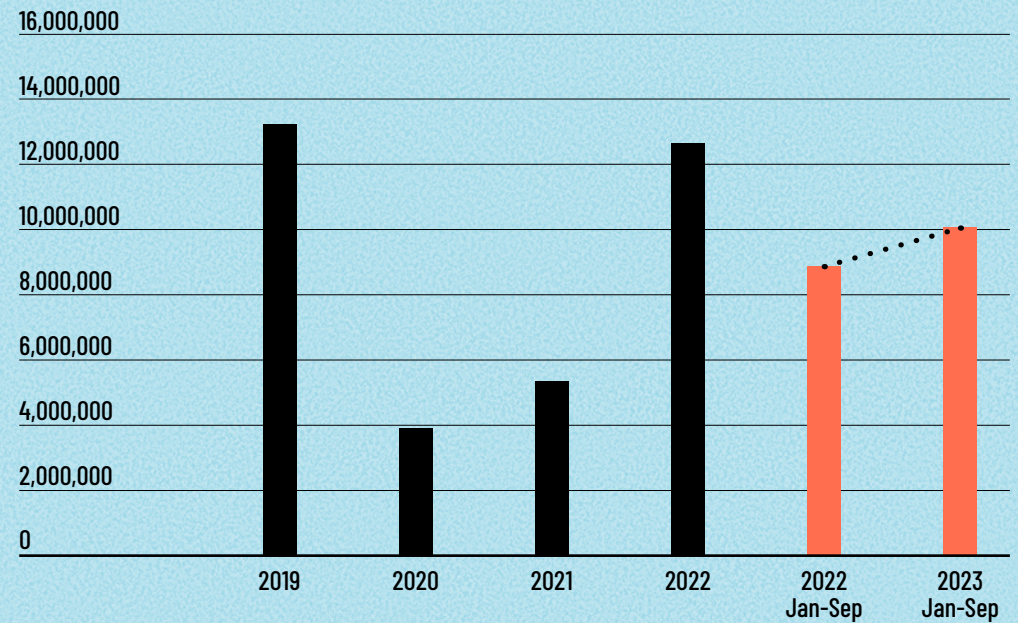
Source: Air Transport Statistics (ISTAC)

Annual tourism expenditure at current prices has exceeded pre-pandemic fi-gures, rising from €14,903 million in 2019 to €16,863 million in 2023. However, for a more accurate analysis, it is necessary to take into account the exceptional moment of inflation in which we find ourselves. In the first and second quarter of 2023, tourism expenditure has also increased by 22.9% compared to the same period in 2022 (indicated by the dashed line in the graph).

Cumulative overnight stays in hotels and apartments in the Canary Islands have experienced growth since 2020, which was affected by the COVID-19 pande-mic. During the period from January to September 2023, there was an 11.50% increase in overnight stays compared to the same period in 2022 (indicated by the dashed line in the graph).

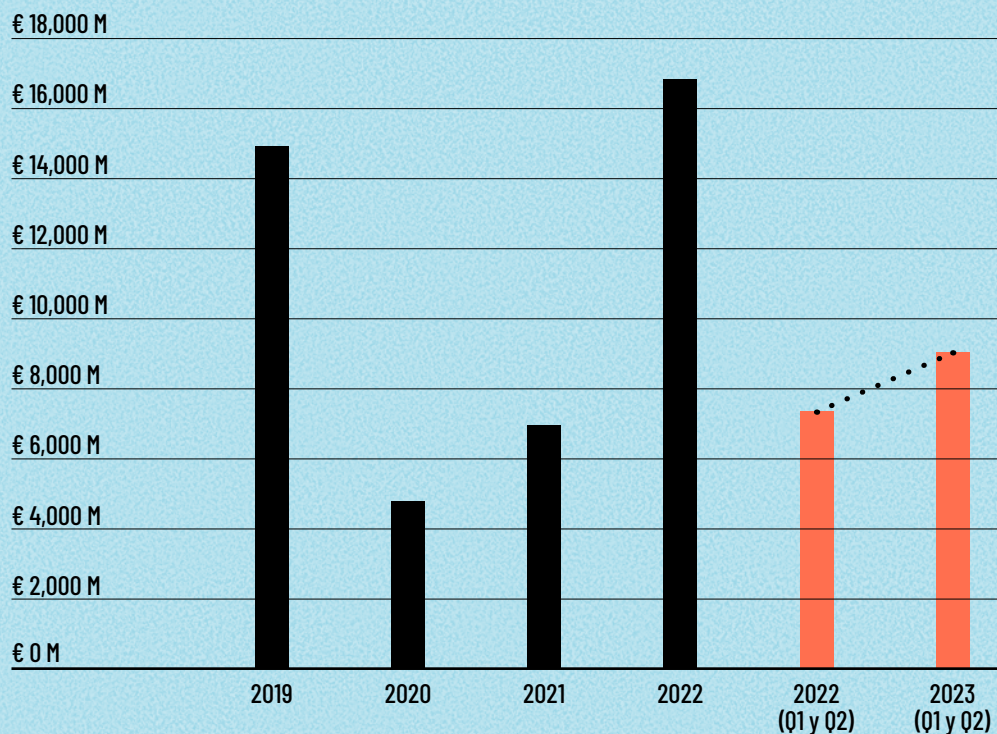## Total tourist expenditure at current prices by mainlanders and foreigners

Source: Tourism Expenditure Survey (ISTAC)

Overnight stays in hotels and flats in the Canary Islands
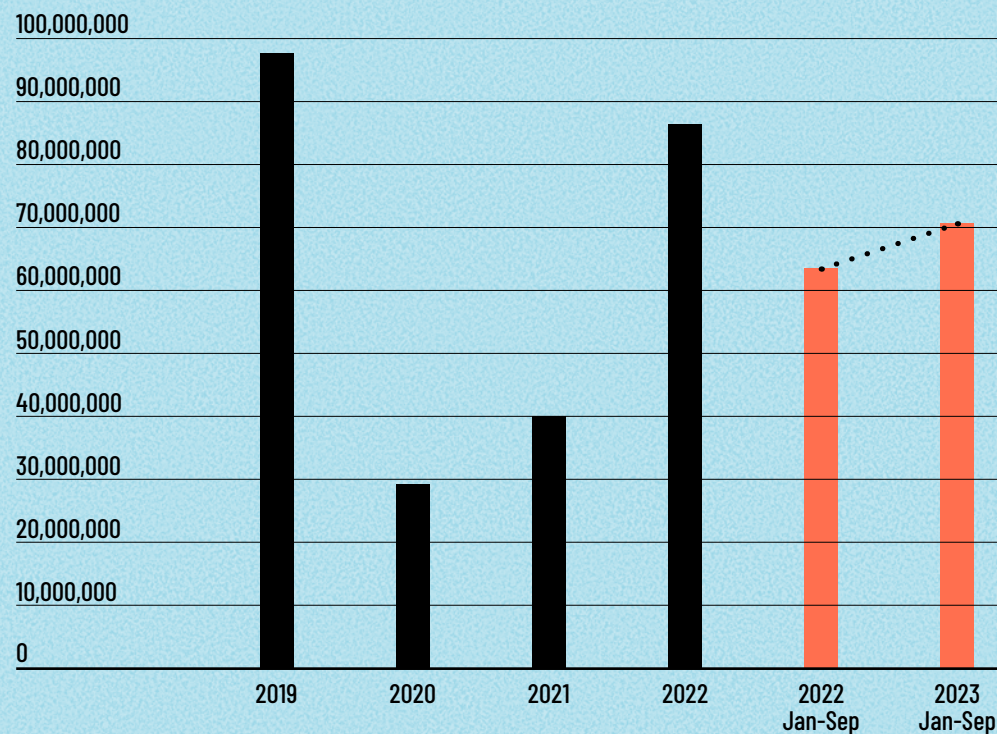
Source: Tourist Accommodation Survey (ISTAC)

Employment in activities characteristic of tourism (Canary Islands).
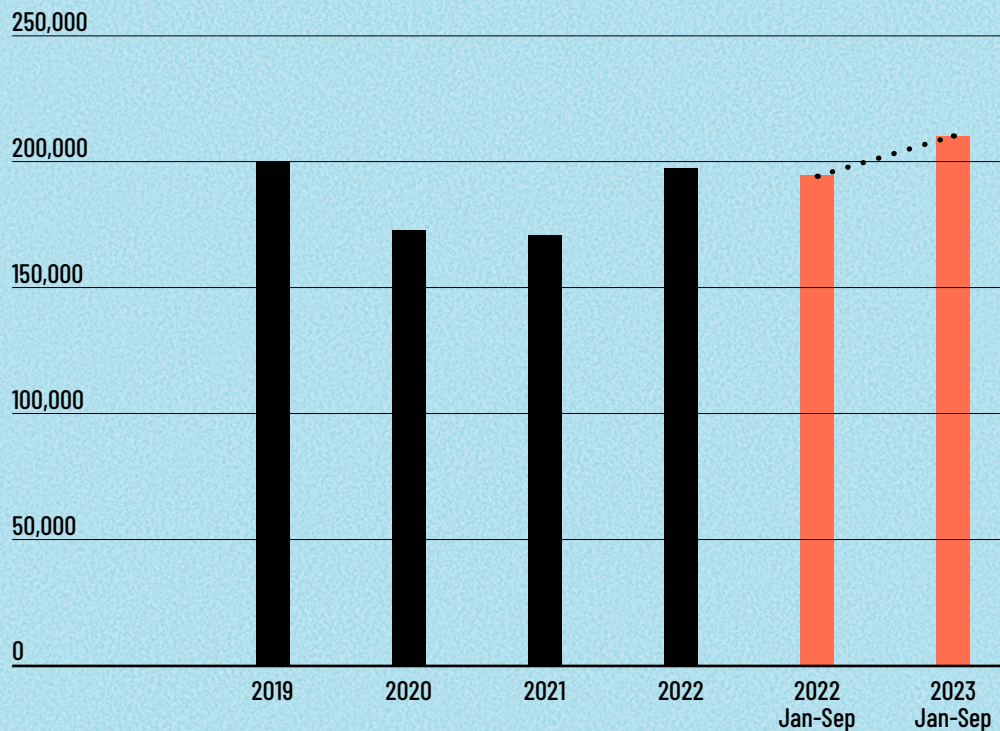
Source: Social Security Enrolment Statistics by place of contribution. (ISTAC)

Employment in tourism activities in 2022 almost reached the pre-pandemic level in 2019. The year 2023 has seen a significant growth in this figure, surpassing pre-COVID-19 records.

The impacts on tourism of the volcanic eruption on La Palma

The island of La Palma has recently suffered two crises. On the one hand, in 2020, the health crisis caused by the COVID-19 virus, which affected the whole world, and on the other hand, in 2021, the eruption of the Tajogaite volcano.

Tourist arrivals to La Palma, both foreign and domestic, had begun to decline after reaching a peak in 2017, showing minimum levels in 2020, the year of the pandemic. From then on, tourist arrivals to the island began to recover.

In 2021, mainland Spain tourists surpassed international tourists, representing 55% of the total number of tourists arriving at La Palma, something unprecedented if we analyse historical data. This is explained by the exceptional post-pandemic situation together with the volcanic eruption in September of the same year. In 2022, there was a certain recovery of tourism because of the end of the volcanic eruption, but it is nowhere near the pre-pandemic levels.

During the volcanic eruption, La Palma lost approximately 1,000 beds, according to various sources, mainly holiday homes. But after the end of the eruptive phase, the gas emissions have prevented the return to the market of approximately another 4,000 places, mainly located in Puerto Naos and La Bombilla. In turn, this fall in the number of places has had a negative effect on air connectivity, mainly international. As a consequence, tourist arrivals in 2022 and 2023 are well below pre-pandemic levels.

Arrival from mainland Spain and foreign tourists to La Palma
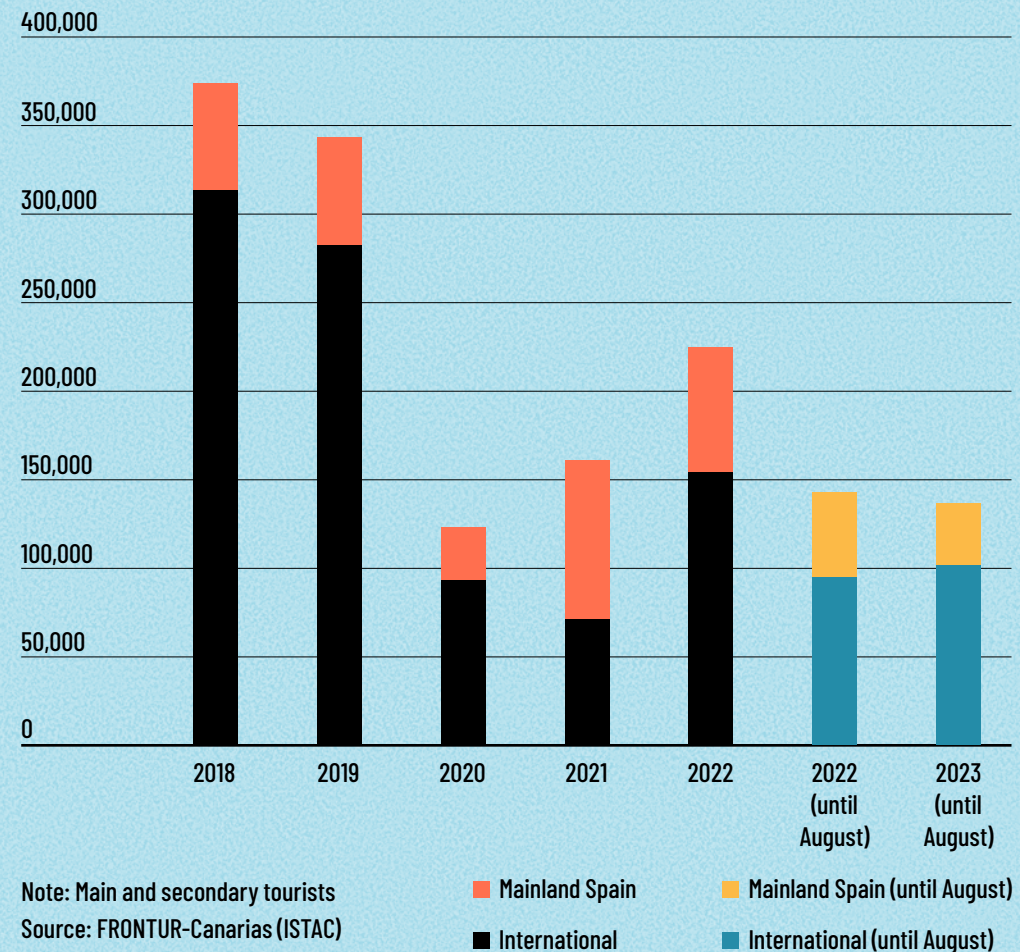
Note: Main and secondary tourists
Source: FRONTUR-Canarias (ISTAC)

Legend:
- Mainland Spain
- International
- Mainland Spain (until August)
- International (until August)

4

Key issue areas of tourism sustainability in the Canary Islands

Key issue areas of tourism sustainability in the Canary Islands	Relationship with INSTO-OMT issue areas
1. Destination attractiveness and tourist satisfaction	Canary Islands specific issue
2. Tourism seasonality	INSTO Mandatory issue
3. Air transport connectivity and intermediation	Canary Islands specific issue
4. Destination innovation, economic impacts and benefits	INSTO Mandatory issue (extended)
5. Labour skills, entrepreneurship and employment	INSTO Mandatory issue (extended)
6. Digitalization, knowledge and smart tourism	Canary Islands specific issue
7. Energy management	INSTO Mandatory issue
8. Water and wastewater management	INSTO Mandatory issue (two areas)
9. Solid waste management	INSTO Mandatory issue
10. Natural capital supporting tourism. Protected areas and fragile ecosystems	Canary Islands specific issue
11. Climate change impacts and mitigation	INSTO Mandatory issue
12. Local satisfaction with tourism and local well-being	INSTO Mandatory issue (extended)
13. Mass tourism and overtourism	Canary Islands specific issue
14. Maturity of the destination and renovation	Canary Islands specific issue
15. Universal accessibility and inclusivity	INSTO Mandatory issue
16. Governance	INSTO Mandatory issue

INSTO-OMT Mandatory issues

Tourism Seasonality

Employment

Destination Economic Benefits

Energy Management

Water Management

Waste Water (Sewage) Management

Solid Waste Management

Climate Action

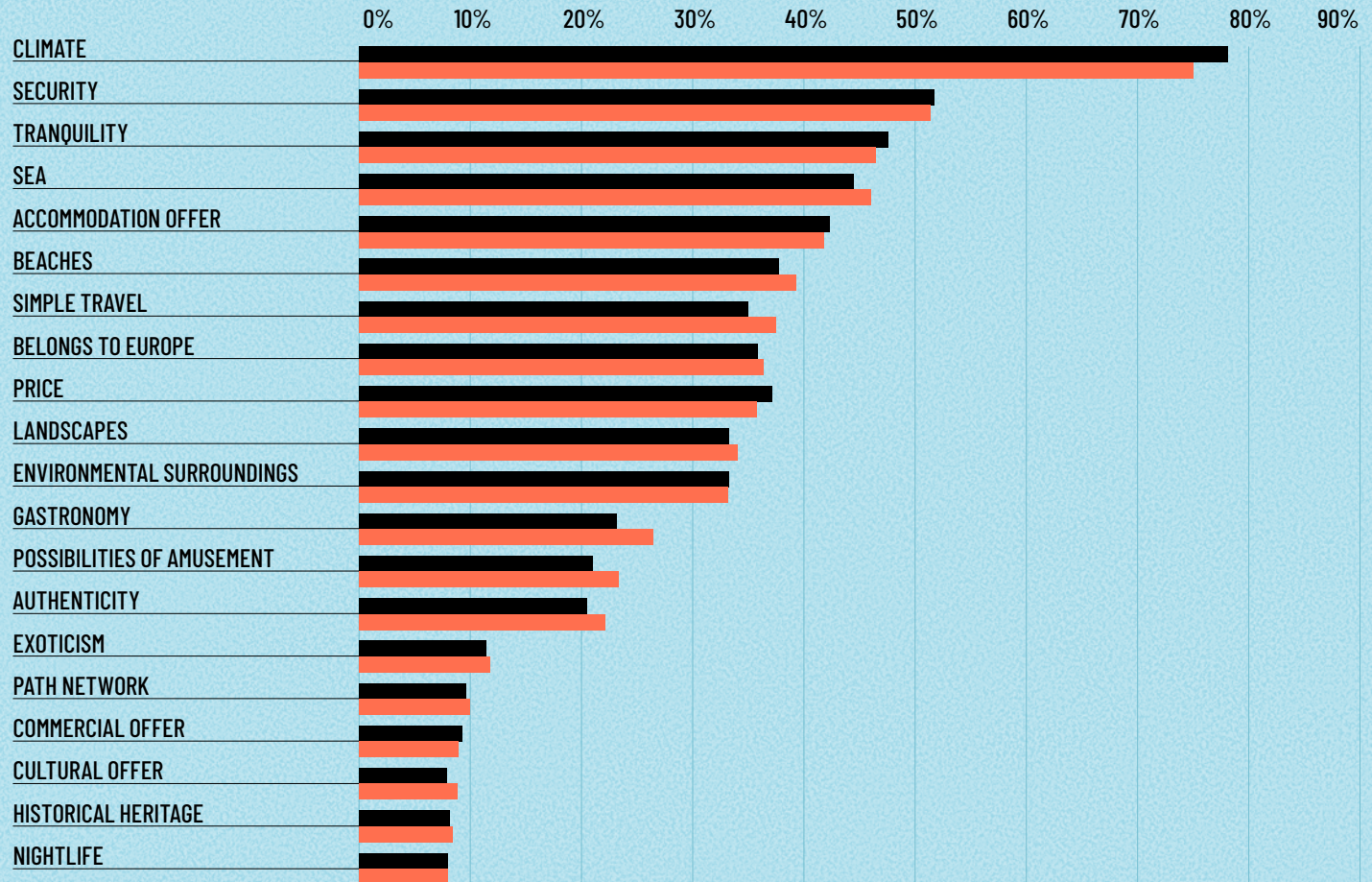Accesibility

Local Satisfaction

Governance

The INSTO network uses 11 mandatory key areas which, in the case of the Canary Islands, have been increased to 16.

Destination attractiveness and tourist satisfaction

The Canary Islands have become a highly desirable tourist destination due to a variety of factors, including climate, security, tranquillity, the sea, and a diverse range of accommodations. According to ISTAC, climate continues to be a significant consideration for tourists, though the percentage of visitors who prioritize it decreased slightly from 78% in 2019 to 75% in 2022.

Interestingly, some of the factors that influence tourists' selection of the Canary Islands have shifted in 2022 compared to pre-pandemic times. Notably, there has been a noteworthy increase in the number of tourists who consider gastronomy to be a key factor, with 26.6% in 2022 compared to 23.3% in 2019. Moreover, other factors such as the sea, ease of travel, range of activities available, and authenticity have become more relevant to tourists in 2022.

Percentage of tourists according to the importance of aspects in the choice of the Canary Islands

Horizontal bar chart comparing Canary Islands 2019 (black) and Canary Islands 2022 (orange) across aspects: CLIMATE, SECURITY, TRANQUILITY, SEA, ACCOMMODATION OFFER, BEACHES, SIMPLE TRAVEL, BELONGS TO EUROPE, PRICE, LANDSCAPES, ENVIRONMENTAL SURROUNDINGS, GASTRONOMY, POSSIBILITIES OF AMUSEMENT, AUTHENTICITY, EXOTICISM, PATH NETWORK, COMMERCIAL OFFER, CULTURAL OFFER, HISTORICAL HERITAGE, NIGHTLIFE.

Note: For each aspect there are 4 different answers ("Very much", "Quite a lot", "Something", "Nothing"). The data in the graph refer to the percentage of tourists who selected the answer "Very much".
Source: Tourism expenditure survey (ISTAC)

■ Canary Islands 2019
■ Canary Islands 2022

Island singularities in pull factors

Each island has its own singularities in terms of its tourist attraction, which may favour a diversification of the offer based on the relevance of sun and beach tourism. In the case of Tenerife, Gran Canaria, Lanzarote and Fuerteventura, in addition to the climate, the main aspects of choice are security, tranquillity, the sea, the beaches and the accommodation on offer (ISTAC, 2022). La Palma, La Gomera and El Hierro, on the other hand, have a strong position in terms of nature tourism and active tourism. According to the Canary Islands Statistics Institute (ISTAC, 2022), in the case of Gran Canaria, beaches (GC: 45.3%; Canary Islands: 39.3%), the sea (GC: 49.7%; Canary Islands: 46.0%) and nightlife (GC: 11.5%; Canary Islands: 7.9%) stand out as very important reasons for choosing the destination. As for Tenerife, the motivations related to the landscape (TF: 37.5%; Canary Islands: 34.1%) and the environment stand out.

Percentage of tourists according to the aspect of choice of destination considered very important. Comparison Gran Canaria– Canary Islands (2022).

Percentage of tourists according to the aspect of choice of destination considered very important. Comparison Tenerife– Canary Islands (2022).
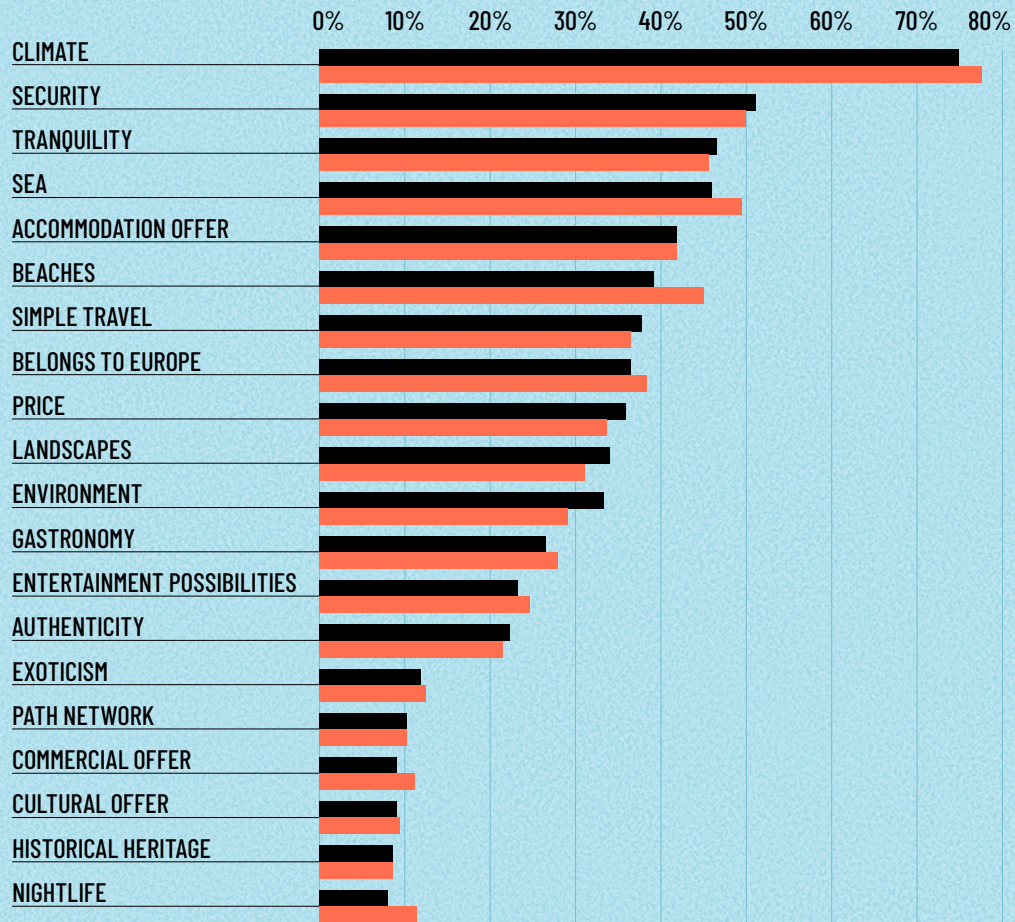
Source: Tourism expenditure survey (ISTAC)

■ Canary Islands
■ Gran Canaria
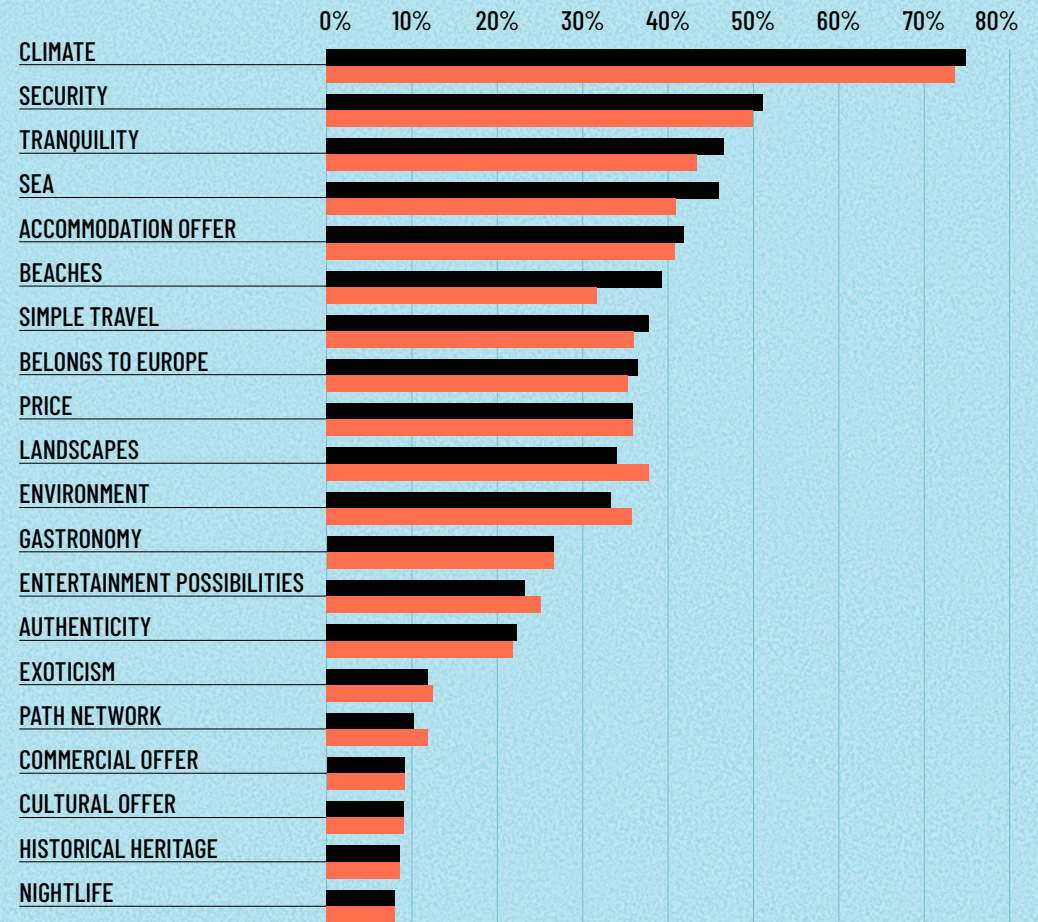
Source: Tourism expenditure survey (ISTAC)

■ Canary Islands
■ Tenerife

In the case of Lanzarote, security stands out as a reason for choosing the island as a whole (LZ: 54.8%; Canary Islands: 51.3%), as well as other aspects in which small variations can be seen between the island and the general pattern in the Canary Islands.

Fuerteventura and La Palma are the islands with the greatest singularity in terms of attractiveness with respect to the general pattern observed in the Canary Islands. Tourists visiting Fuerteventura are interested in its beaches (FV: 59%; Canary Islands: 39.3%); the sea (FV: 61.7%; Canary Islands: 46.0%) and tranquillity (FV: 53.0%; Canary Islands: 46.5%).

Percentage of tourists according to the aspect of choice of destination considered very important. Lanzarote-Canary Islands comparison (2022).
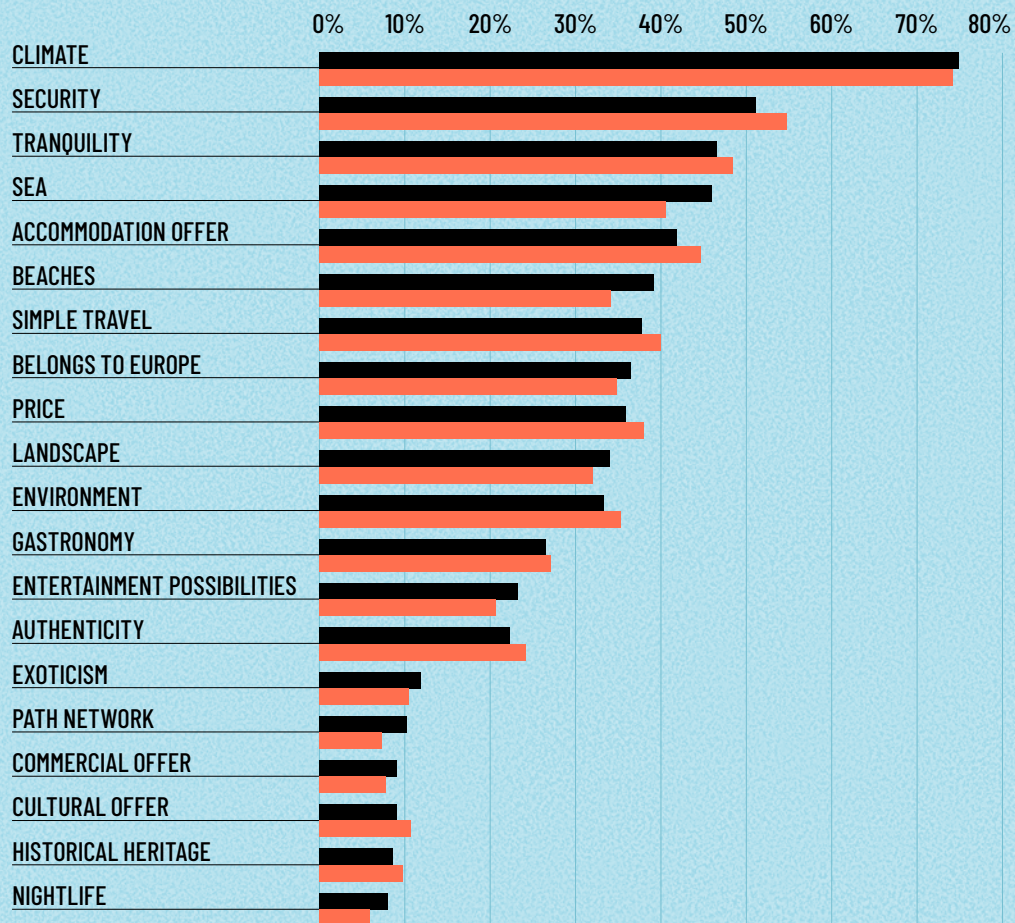
Percentage of tourists according to the aspect of choice of destination considered very important. Comparison Fuerteventura- Canary Islands (2022).

	Canary Islands vs Lanzarote	Canary Islands vs Fuerteventura
CLIMATE		
SECURITY		
TRANQUILITY		
SEA		
ACCOMMODATION OFFER		
BEACHES		
SIMPLE TRAVEL		
BELONGS TO EUROPE		
PRICE		
LANDSCAPE		
ENVIRONMENT		
GASTRONOMY		
ENTERTAINMENT POSSIBILITIES		
AUTHENTICITY		
EXOTICISM		
PATH NETWORK		
COMMERCIAL OFFER		
CULTURAL OFFER		
HISTORICAL HERITAGE		
NIGHTLIFE		

Source: Tourism expenditure survey (ISTAC)

■ Canary Islands
■ Lanzarote

Source: Tourism expenditure survey (ISTAC)

■ Canary Islands
■ Fuerteventura

In the case of La Palma, tourists who visit the island emphasise the importance of the landscapes, the network of footpaths, the environment, authenticity and tranquillity as factors in their choice of destination. Landscape is a very important aspect of choice for 66% of tourists visiting the island (Canary Islands: 34.1%); the network of footpaths is also important for 37.2% of tourists (Canary Islands: 10.1%) and the environment for 48.6% (Canary Islands: 33.3%).

Percentage of tourists who consider some aspect of destination choice to be very important. Comparison La Palma – Canary Islands (2022).

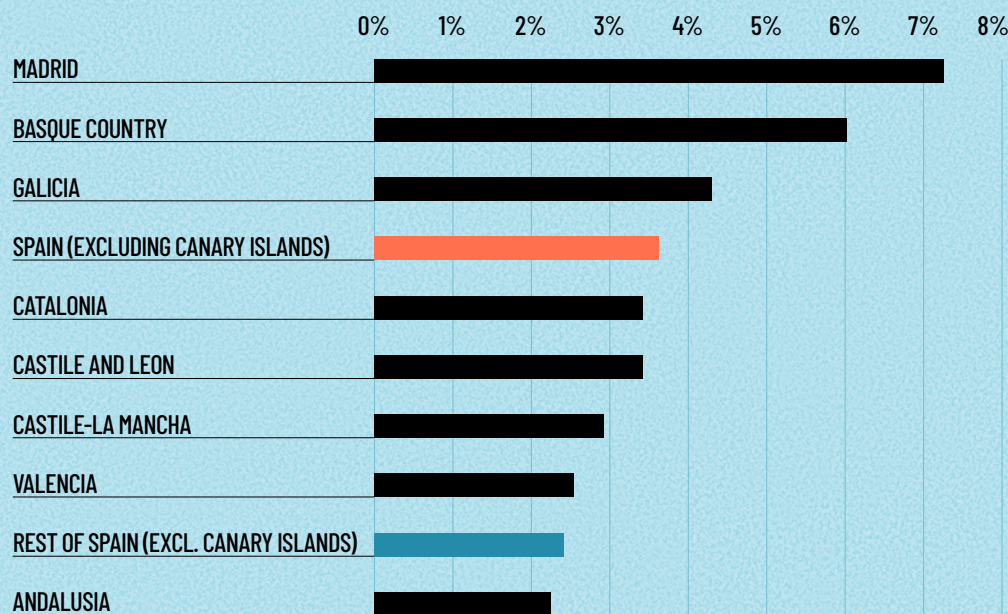Source: Tourism expenditure survey (ISTAC)

■ Canary Islands
■ La Palma
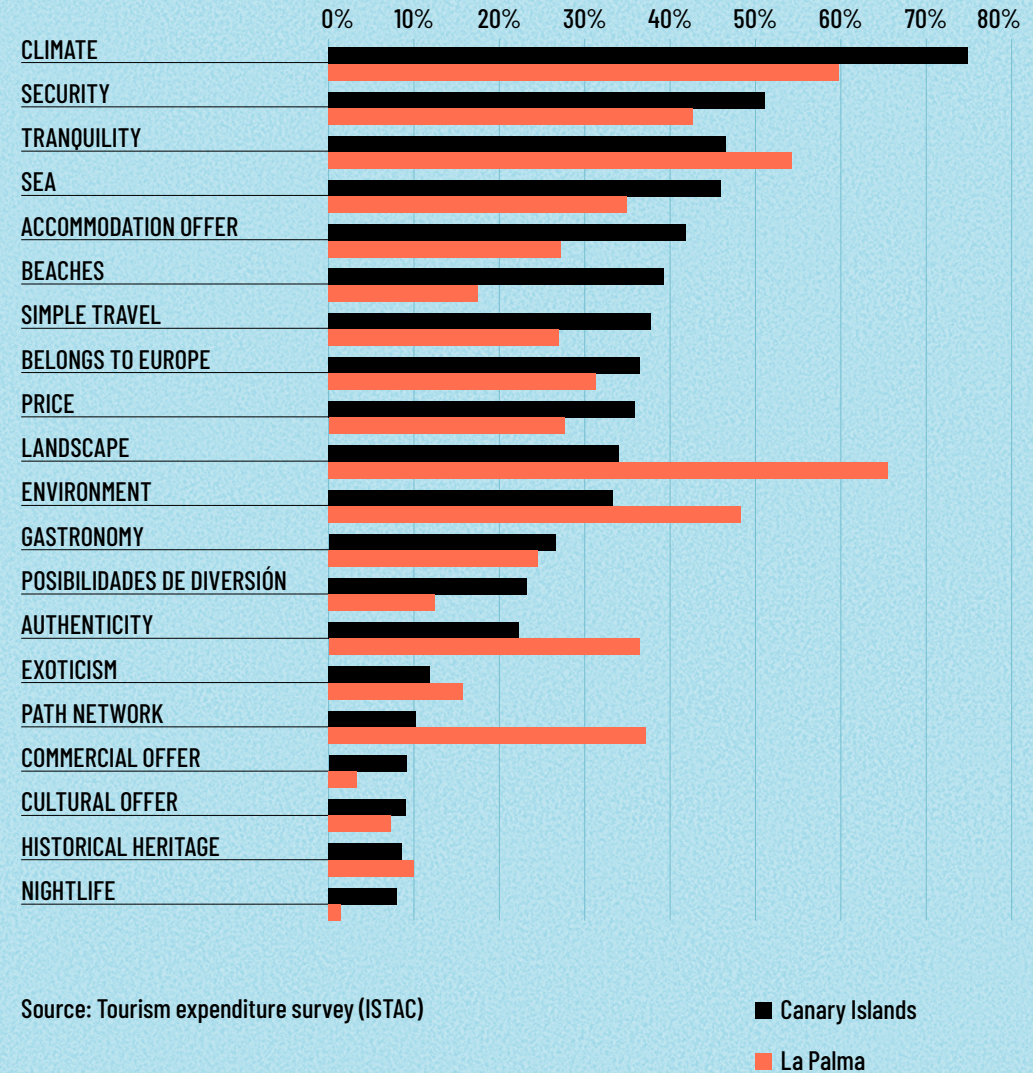
Attraction and motivation of mainland Spain tourists

The annual series of tourist micro-markets in Spain, from the Canary Islands Statistics Institute (ISTAC) provides data on visits to the Canary Islands from the different autonomous regions of Spain. Madrid, the Basque Country and Galicia stand out as the main places of origin as a percentage of the total population of each autonomous region.

The Residents' Travel Survey offered by the INE provides data on the main reasons for trips to the Canary Islands by Spanish residents from the mainland, as well as by Canary Islands' residents themselves. According to this study, Canary Island residents made 3.8 million trips to the islands themselves in 2022, which meant 13.9 million overnight stays. Whereas Spanish mainlanders made 1.8 million trips with a number of overnight stays of 13.4 million, staying in any type of tourist accommodation, whether their own or family accommodation. In fact, the number of overnight stays by mainlanders travelling to the Canary Islands reached 6.6 million, 48% of the overnight stays of mainland tourists in the Canary Islands. Professional reasons are also slightly more frequent among the mainlanders who make trips to the Canary Islands than among the residentes in the Canary Islands who make tourist trips within the region.

Percentage of visits to the Canary Islands from each Autonomous Region in relation to the population of the Region of origin. 2022

Overnight stays in the Canary Islands by tourists resident on the mainland and in the Canary Islands. 2022

- Residents from mainland Spain
- Canary Islands residents

Source: Tourism expenditure survey (ISTAC) - Annual series of tourism micro-markets in Spain (ISTAC)
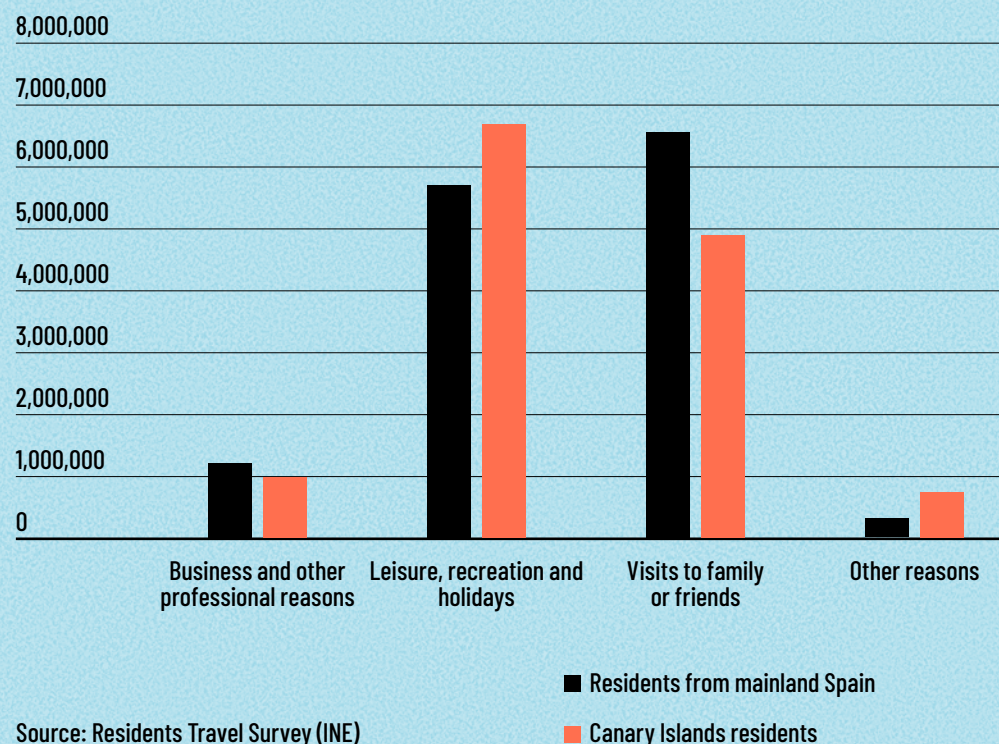
Source: Residents Travel Survey (INE)

Tourist activity and loyalty

In 2022, 36% of the tourists who visited the Canary Islands had been to the islands five or more times previously. For 30% of tourists it was their first visit (ISTAC, 2022). Trips to the Canary Islands are usually made by visiting a single island (93%, ISTAC, 2022).

The most frequent activities carried out by tourists in the Canary Islands: walking (74%); enjoying the beaches (71%) as well as the swimming pool and hotel facilities (61%) and touring the island on their own (49%).

Activities carried out by foreign and mainland tourists during their stay in the Canary Islands (as a percentage)

WALK, STROLL
BEACH
SWIMMING POOL, HOTEL FACILITIES
TOUR THE ISLAND ON YOUR OWN
TASTE CANARIAN GASTRONOMY OR LOCAL PRODUCTS
ACTIVITIES IN THE NATURE
ORGANISED EXCURSIONS
NIGHTLIFE, CONCERTS, SHOWS
SEA ACTIVITIES
LEISURE OR AMUSEMENT PARKS
SPORTS ACTIVITIES
MARITIME EXCURSIONS, WHALE WATCHING
WINERIES, MARKETS, POPULAR FESTIVALS
MUSEUMS, EXHIBITIONS, CULTURAL CENTRES
BEAUTY AND HEALTH TREATMENTS
ASTRONOMICAL OBSERVATION

Percentage of tourists who have made previous visits to the Canary Islands

5 OR MORE VISITS
3-4 VISITS
1-2 VISITS
NONE

Source: Tourism expenditure survey (ISTAC)

■ 2019
■ 2022

Source: Tourism expenditure survey (ISTAC)
Note: Percentages are calculated with respect to the total number of foreign and mainland tourists aged 16 and over according to the Canary Islands Statistics Institute (ISTAC).

■ 2019
■ 2022

A total of 66.4% of tourists made expenditures in restaurants or cafes in 2022. In 2019, the percentage of tourists making an expenditure in these establishments was lower (59.5%).

Percentage of tourists' spending on different services (2019-2022)
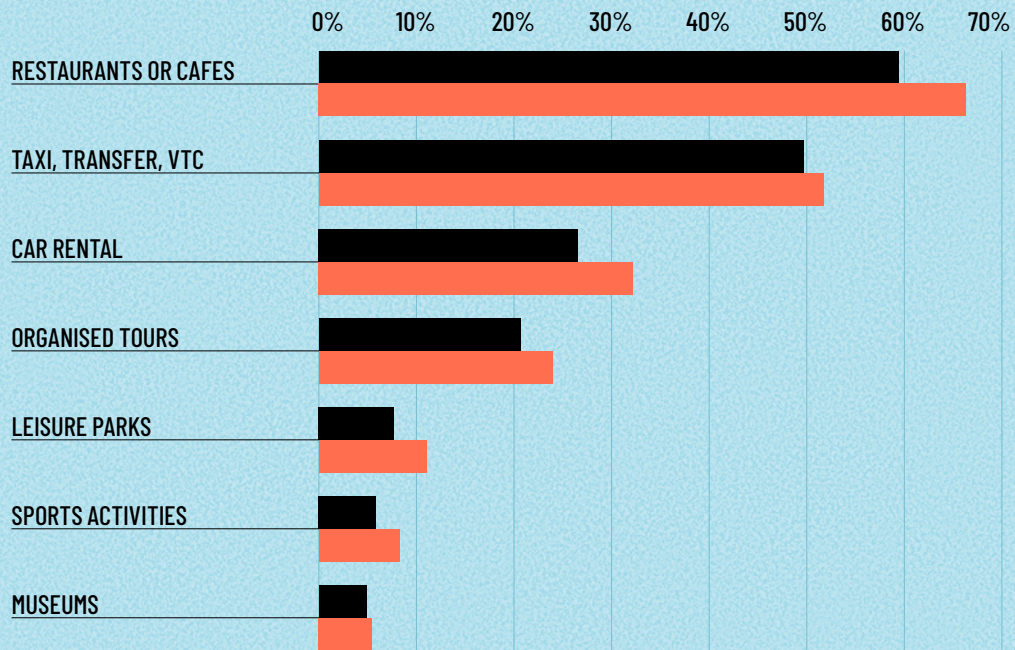
Source: Promotur, based on the ISTAC Tourism expenditure survey.

■ 2019
■ 2022
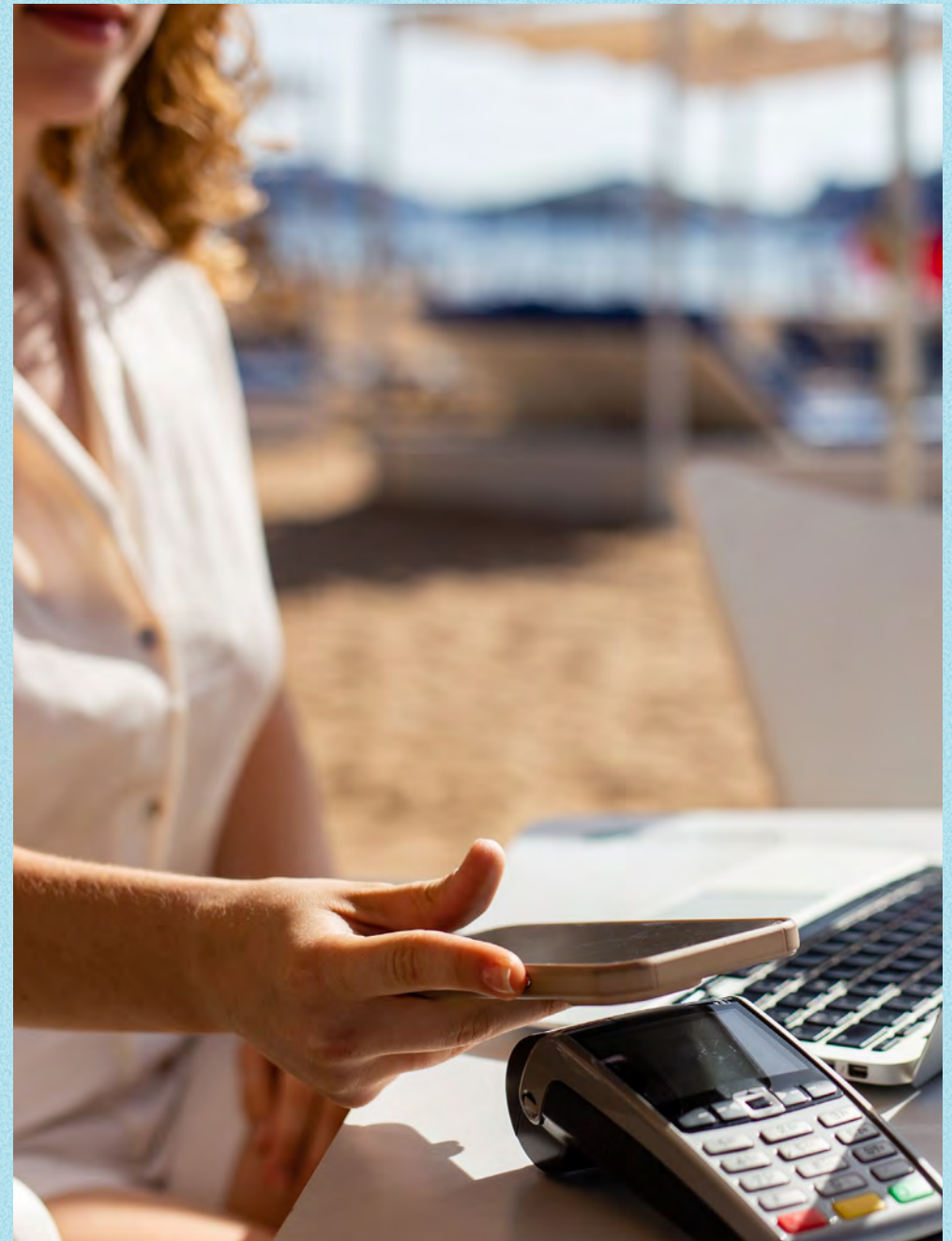
Types of accommodation

In 2022, 39% of tourists stayed in 4-star hotels; 16% in apartments or villas; 11% in 1-3 star hotels, 10% in 5-star hotels. A rented house or room from a private individual, which can be related to holiday rentals, was the option chosen by 7% of tourists, while 9% stayed with friends or relatives.

A total of 51% of tourists who stayed in 4-star hotels booked an all-inclusive deal. 46% of tourists spend between 4 and 8 hours away from the accommodation and 26% between 9 and 12 hours.
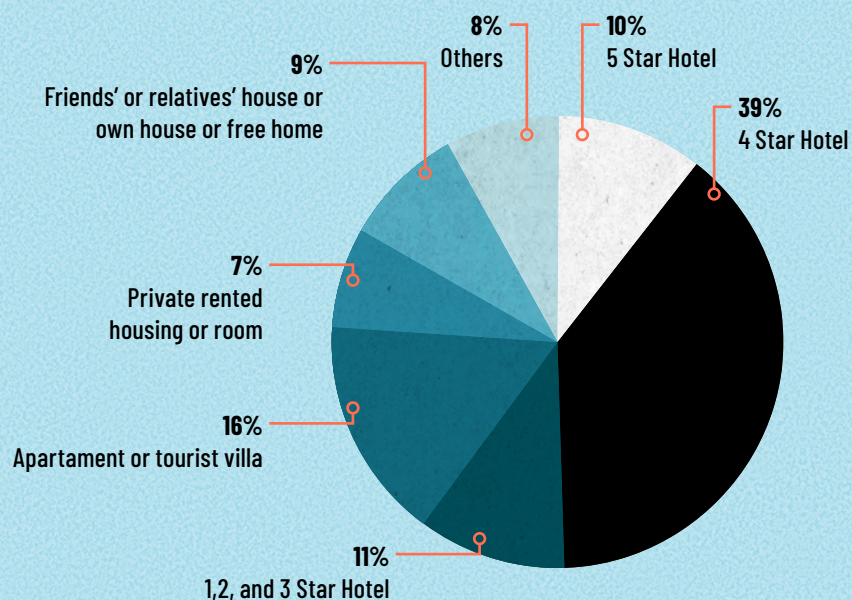
In 2023, 29% of visitors to the Canary Islands opted for the all-inclusive regime. If we analyse the figures for each of the islands, Fuerteventura attracted the largest share of tourists under this regime, with 49% of the tourists in hotels in the island. This was followed by Lanzarote with 29% and Gran Canaria with 27%. On the other hand, Tenerife and La Palma were the islands with the lowest number of all-inclusive tourists, representing 22% and 21% respectively (EGT, ISTAC).

Types of accommodation in the Canary Islands. 2022



8% Others
10% 5 Star Hotel
9% Friends' or relatives' house or own house or free home
39% 4 Star Hotel
7% Private rented housing or room
16% Apartament or tourist villa
11% 1,2, and 3 Star Hotel

Source: Tourism expenditure survey (ISTAC)

Percentage of all-inclusive travellers for each hotel typology. 2022
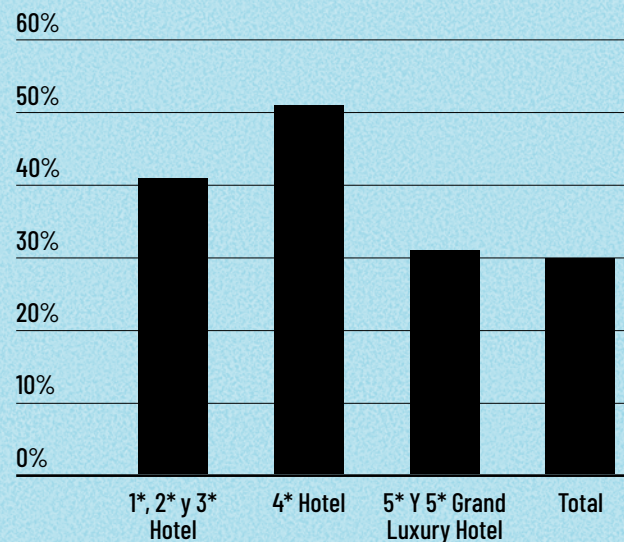
Source: Tourism expenditure survey (ISTAC)

Travellers entering hotels by category (%). 2023

- 5 Star Hotel
- 4 Star Hotel
- 1, 2 and 3 Star Hotel
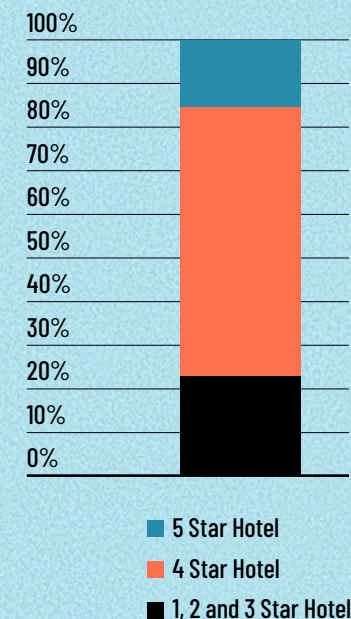
Tourists' attitudes towards more sustainable options

In 2022, 21.5% of tourists declared that they would be willing to choose sustainable options even if this meant some inconvenience (ISTAC). This percentage increases in the case of tourists who engage in sports activities such as surfing (29.5%), diving (26.9%) or cycling (26.7%). Regarding other activities, tourists who visit museums (24.9%) and those who participate in astronomical observation activities (24.7%) also agree more with this statement (Promotur, based on the ISTAC Tourism expenditure survey, 2022).

Tourists in the Canary Islands according to their willingness to choose more sustainable options when booking travel (2022).

0%	5%	10%	15%	20%	25%	30%	35%	40%	45%

YES, BUT ONLY IF IT IS NOT INCONVENIENT FOR ME

NO

YES, EVEN IF IT IS INCONVENIENT FOR ME
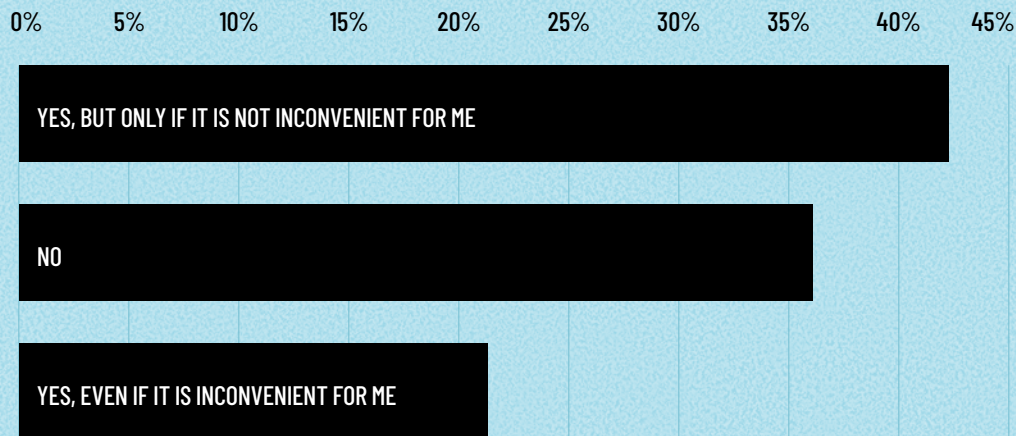
Source: Tourism expenditure survey (ISTAC)
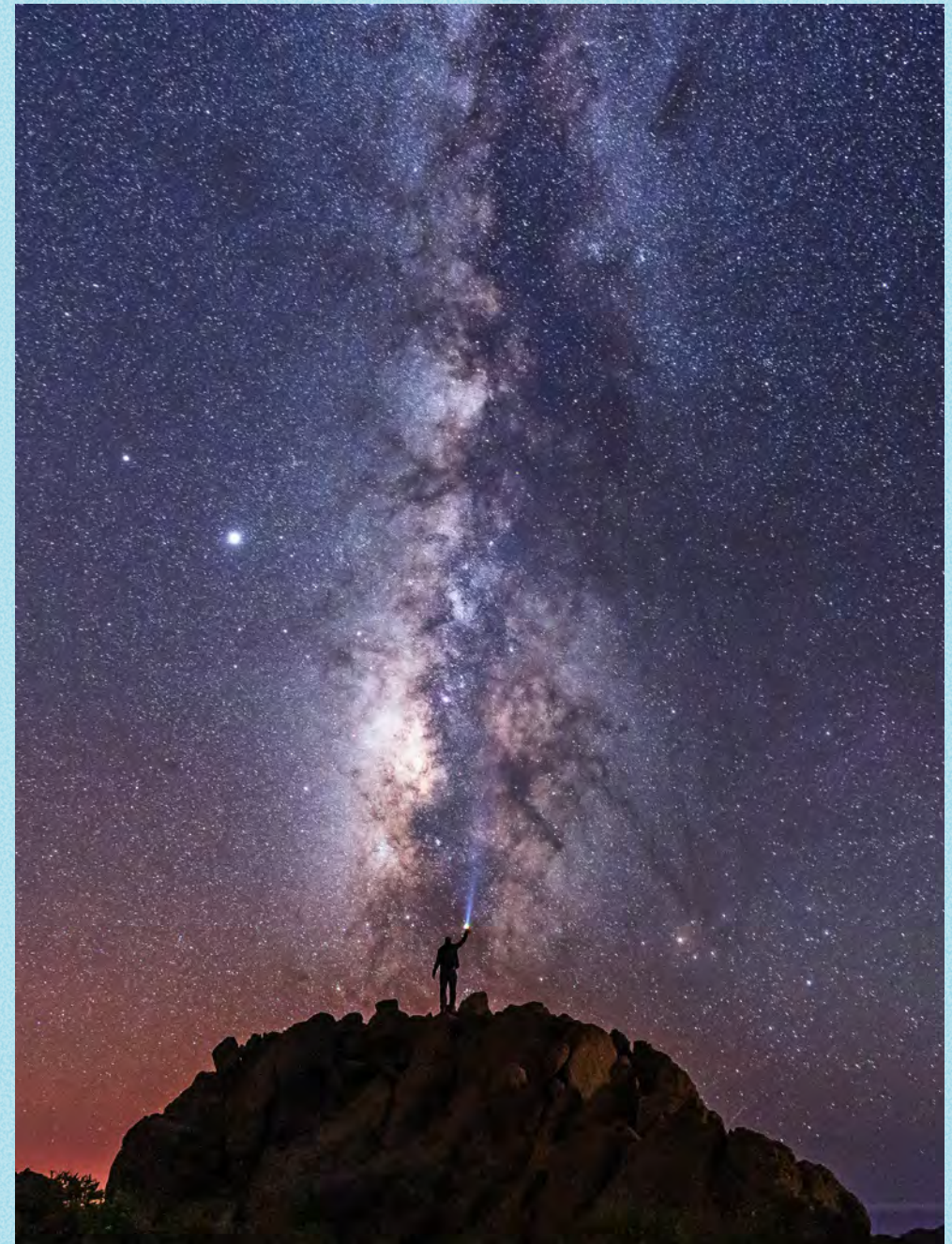
Predisposition towards more sustainable options

Predisposition towards more sustainable options according to cultural and leisure activities at the destination
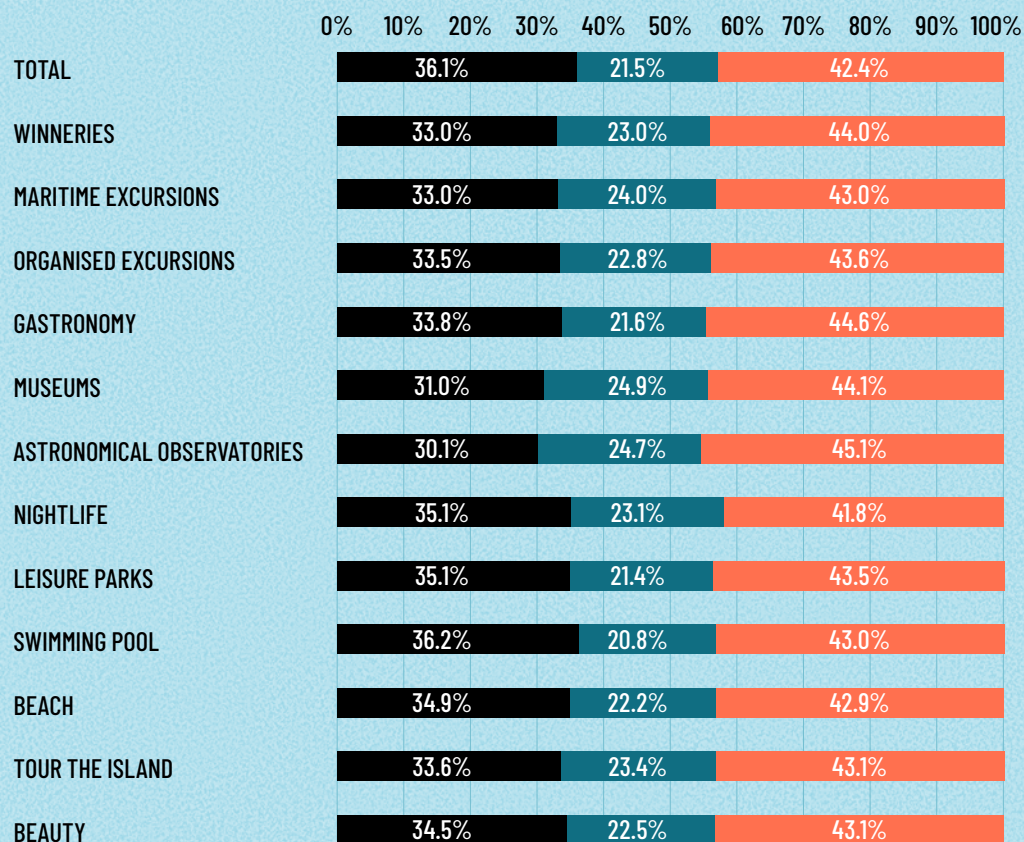
	No	Yes, even if it means some inconvenience	Yes, but only if it is not inconvenient for me
TOTAL	36.1%	21.5%	42.4%
WINNERIES	33.0%	23.0%	44.0%
MARITIME EXCURSIONS	33.0%	24.0%	43.0%
ORGANISED EXCURSIONS	33.5%	22.8%	43.6%
GASTRONOMY	33.8%	21.6%	44.6%
MUSEUMS	31.0%	24.9%	44.1%
ASTRONOMICAL OBSERVATORIES	30.1%	24.7%	45.1%
NIGHTLIFE	35.1%	23.1%	41.8%
LEISURE PARKS	35.1%	21.4%	43.5%
SWIMMING POOL	36.2%	20.8%	43.0%
BEACH	34.9%	22.2%	42.9%
TOUR THE ISLAND	33.6%	23.4%	43.1%
BEAUTY	34.5%	22.5%	43.1%

■ No   ■ Yes, even if it means some inconvenience   ■ Yes, but only if it is not inconvenient for me

Source: Promotur, based on the ISTAC Tourism Expenditure Survey, 2022 (ISTAC, 2022)

Predisposition towards more sustainable options according to sporting activities carried out at the destination
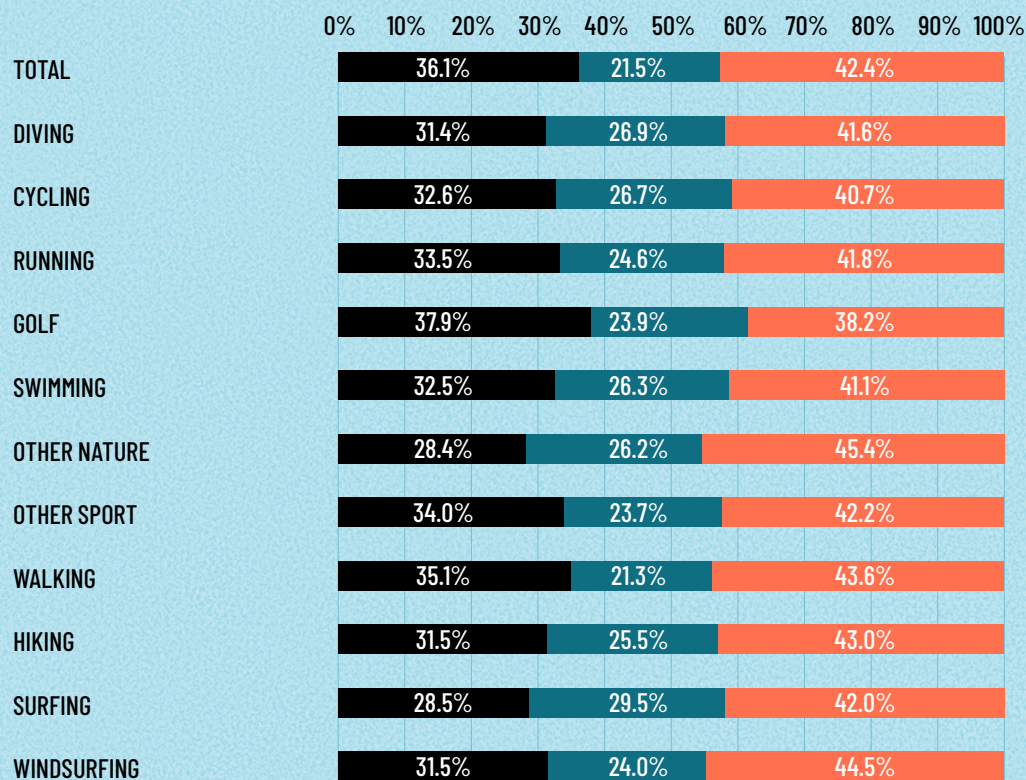
	No	Yes, even if it means some inconvenience	Yes, but only if it is not inconvenient for me
TOTAL	36.1%	21.5%	42.4%
DIVING	31.4%	26.9%	41.6%
CYCLING	32.6%	26.7%	40.7%
RUNNING	33.5%	24.6%	41.8%
GOLF	37.9%	23.9%	38.2%
SWIMMING	32.5%	26.3%	41.1%
OTHER NATURE	28.4%	26.2%	45.4%
OTHER SPORT	34.0%	23.7%	42.2%
WALKING	35.1%	21.3%	43.6%
HIKING	31.5%	25.5%	43.0%
SURFING	28.5%	29.5%	42.0%
WINDSURFING	31.5%	24.0%	44.5%

■ No   ■ Yes, even if it means some inconvenience   ■ Yes, but only if it is not inconvenient for me

Source: Promotur, based on Tourism Expenditure Survey (ISTAC, 2022).

Tourist satisfaction

The Tourist Expenditure Survey (ISTAC) provides information on the intention to recommend the Canary Islands as a tourist destination, the evaluation of the tourist's experience and the intention to visit the islands again. Compared with the data for 2019, before the COVID–19 pandemic, tourist satisfaction has in-creased slightly.

- On a scale of 0–10, the inten-tion to recommend the Canary Islands is 9.06 (ISTAC, 2022).

- Average rating of their ex-perience in the Canary Is-lands (on a scale of 0–10):
    2019: 8.70/10 (ISTAC, 2019).
    2022: 8.85/10 (ISTAC, 2022).

- Average rating of intention to return to the Canary Islands (on a scale of 0–10):
    2019: 8.73 / 10 (ISTAC, 2019).
    2022: 8.82 / 10 (ISTAC, 2022).

Tourist satisfaction (2022)

Bar chart showing: Meets expectations 53%, Better or much better than expected 44%, Worse or much worse than expected 3%.
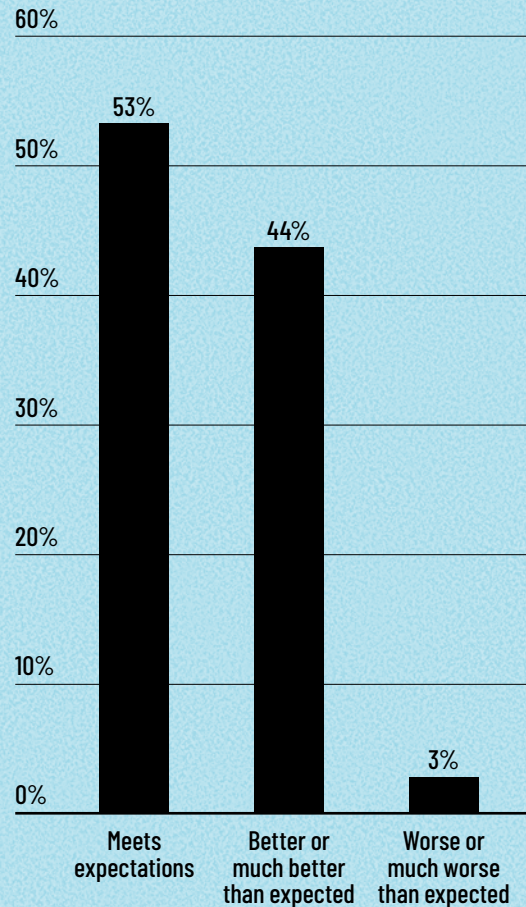
Source: Tourism Expenditure Survey (ISTAC)

Evaluation of the experience. Comparison with competitors

According to an analysis of the rating of experiences on Tripadvisor with data from 2022 referring to the Canary Islands and competing destinations (Promotur, 2023), in the Canary Islands, the average rating of the activities offered is 4.51 points (scale of 1–5), similar to that of Cancun or Cuba. With respect to the average rating of the total n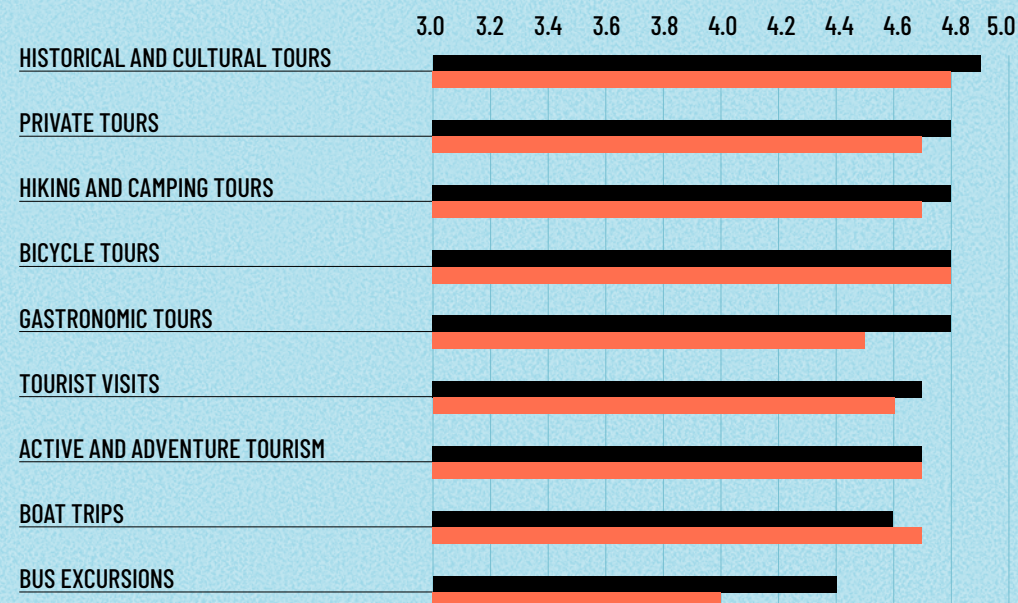umber of destinations analysed (Resorts in the Red Sea Egypt; Bali; Greek Islands; Dominican Rep.; Puerto Rico; Can-cún; Balearic Islands; Madeira; Turkish Riviera) experiences in the Canary Islands are rated higher for boat trip activities (4.7 compared to 4.6). However, ratings are lower for different types of activities: bus excursions (4.0 compared to 4.4); gastro-nomic tours (4.5 compared to 4.8); histo-rical and cultural tours (4.8 compared to 4.9); private tours (4.7 compared to 4.8); hi-king excursions (4.7 compared to 4.8) and sightseeing tours (4.6 compared to 4.7).

Tripadvisor experiences in the Canary Islands and competing destinations (2022)

	Average rating	Number of reviews	Number of operators
Red Sea Resorts (Egypt)	4.7	79,425	569
Bali	4.64	670,233	6,311
Greek Islands	4.56	485,458	2,040
Dominican Republic	4.55	310,347	1,078
Puerto Rico	4.52	162,620	1,114
Canary Islands	4.51	607,655	2,608
Cuba	4.51	173,724	659
Cancun	4.51	267,094	1,043
Balearic Islands	4.48	313,739	2,068
Madeira	4.43	133,361	552
Turkish Riviera	4.31	80,789	563

Tripadvisor experience ratings in the Canary Islands and competing destinations (2022)

Note: Excludes tours and water sports. Competing destinations analysed are: Red Sea Resorts in Egypt; Bali; Greek Islands; Domini-can Republic; Puerto Rico; Cancun; Balearic Islands; Madeira; Turkish Riviera.

Source: Promotur (2023)

◄ Source: Promotur (2023)

Places visited

The Teide National Park (Tenerife) is the most visited place by tourists in the Canary Islands in 2022, followed by the city of Santa Cruz (Tenerife) and Las Dunas de Maspalomas (Gran Canaria), according to the data collected in the ISTAC Tourism Expenditure Survey.

Several natural spaces are among the most visited places by tourists. In addition to the Teide National Park and Las Dunas de Maspalomas (a special nature reserve), Los Gigantes Cliffs (Teno Rural Park, in Tenerife) and the Montaña de Fuego, which form part of the Timanfaya National Park (Lanzarote) stand out as points of tourist interest.

The 20 most visited places in the Canary Islands by tourists (mainland and foreign) in 2022

NUMBER OF VISITS:

Places (top to bottom): PARQUE NACIONAL DEL TEIDE, SANTA CRUZ (CAPITAL OF THE ISLANDS), LAS DUNAS DE MASPALOMAS, LAS PALMAS DE GRAN CANARIA, PUERTO DE MOGÁN, LA LAGUNA (WORLD HERITAGE CITY), ACANTILADO DE LOS GIGANTES, GARACHICO, LA OROTAVA, MONTAÑA DE FUEGO, ICOD DE LOS VINOS (ANCIENT DRAGON TREE), PLAYAS DE JANDÍA, ARRECIFE, EL INTERIOR (CUMBRES), PARQUE RURAL DE ANAGA, JAMEOS DEL AGUA, EL NORTE, BARRANCO DE MASCA, PARQUE NATURAL DUNAS DE CORRALEJO E ISLA DE LOBOS, MIRADOR DEL RÍO

Source: Tourism Expenditure Survey (ISTAC)

Legend: ■ Tenerife ■ Gran Canaria ■ Lanzarote ■ Fuerteventura

Cruise tourism

The islands show a decrease in the number of cruise passengers between 2019 and 2022, ranging from 8% in the case of La Gomera to 43% in the case of La Palma. In total, the Canarian ports received 1.8 million cruise passengers in 2022.

Evolution of cruise passengers in the Canary Islands
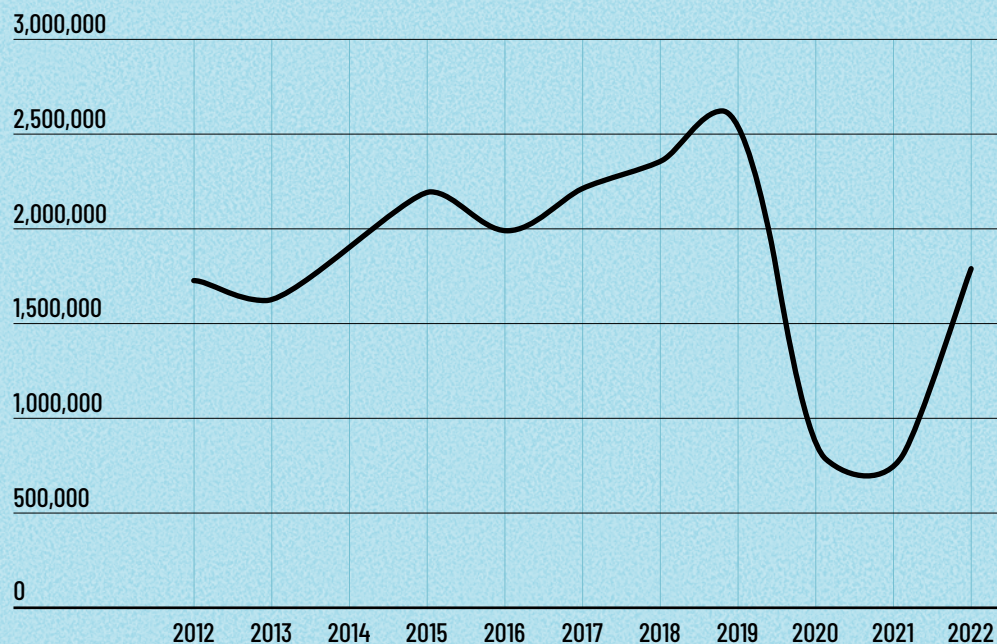
Source: Maritime Transport Statistics (ISTAC)

Percentage variation in cruise passengers in 2022 compared to 2019
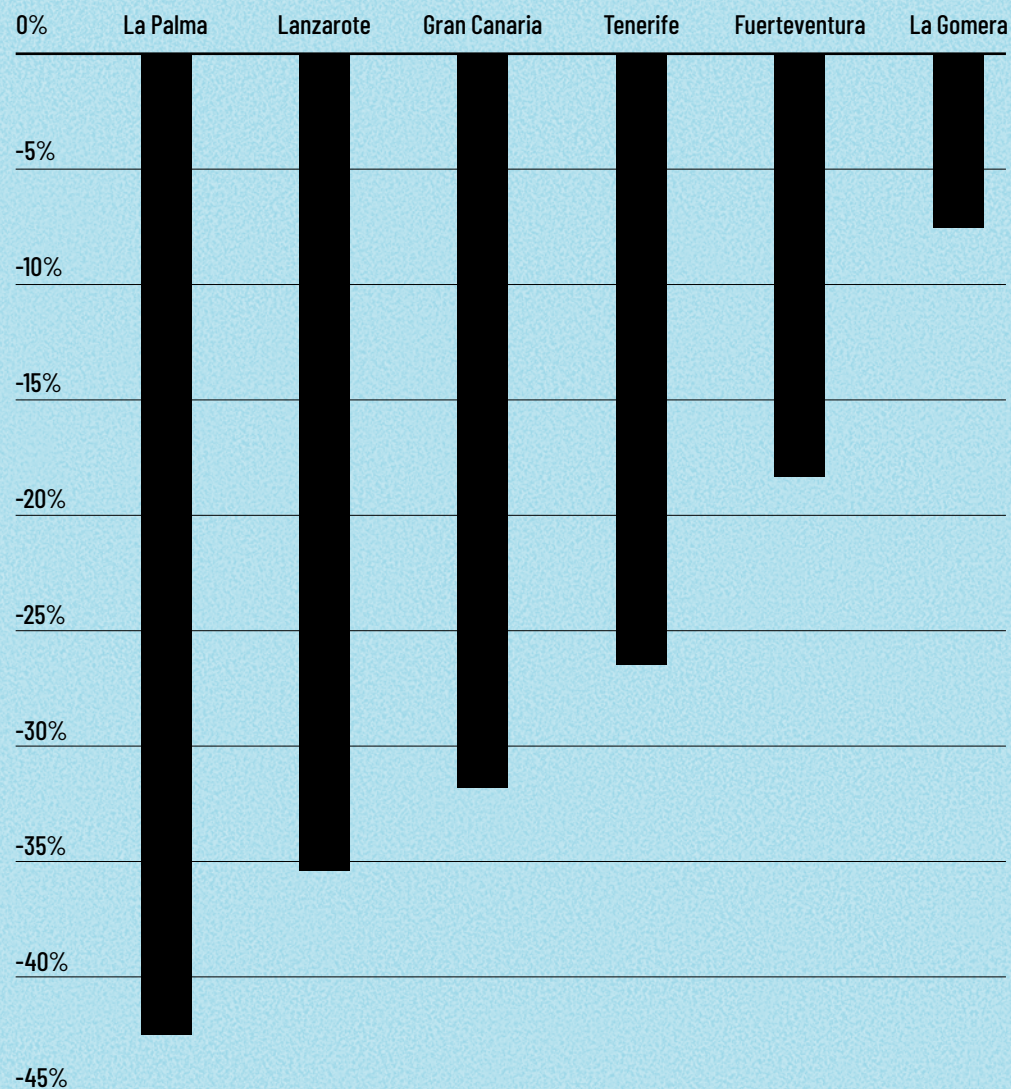
Source: Maritime Transport Statistics (ISTAC)

Evolution of cruise passengers per island

Source: Maritime Transport Statistics (ISTAC)

Legend:
- Tenerife
- La Palma
- Lanzarote
- Gran Canaria
- La Gomera
- Fuerteventura

Checklist of main indicators of issue area 1:
Destination attractiveness and tourist satisfaction

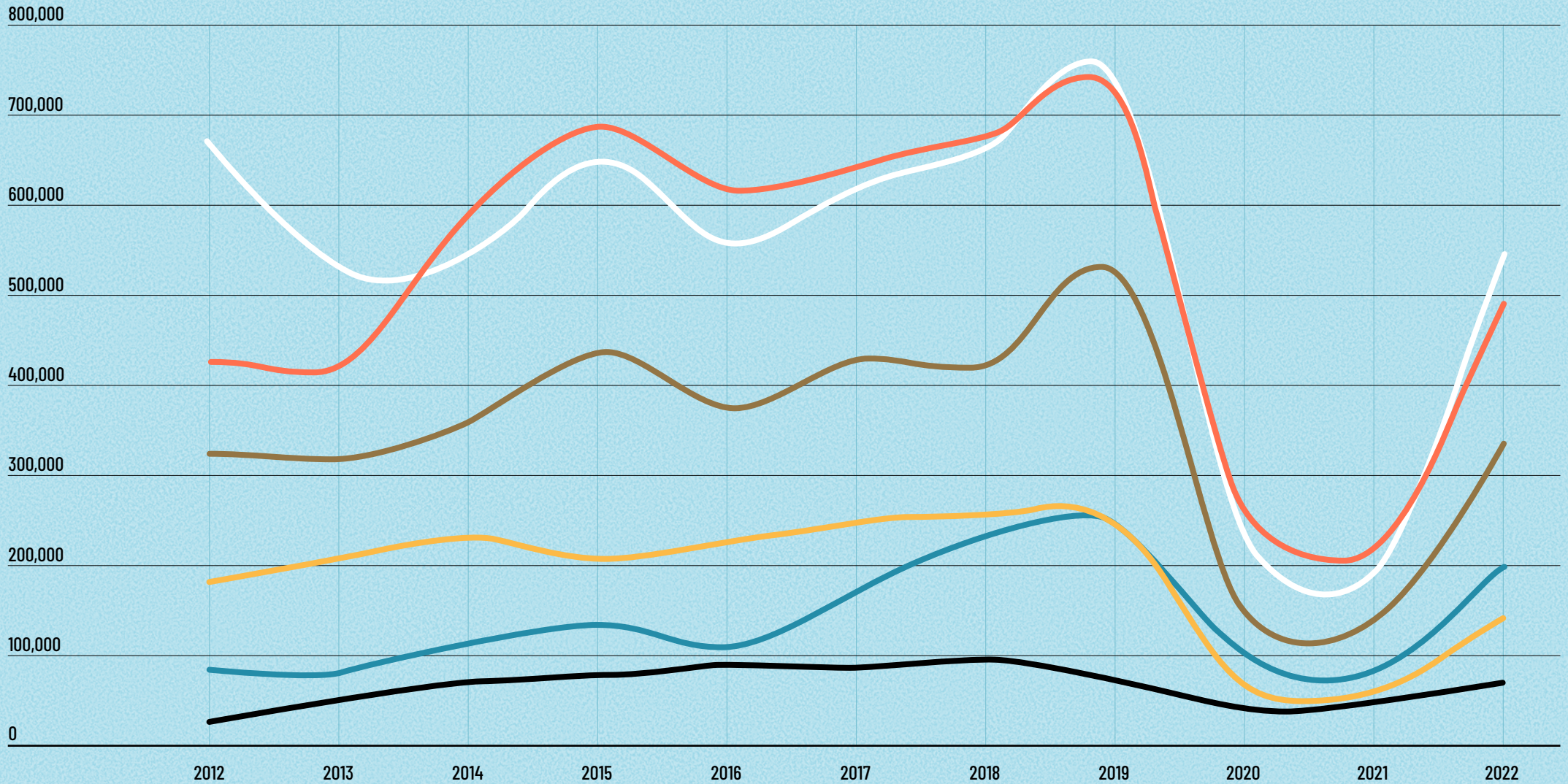| Indicator	Description	Availability	Source	Observaciones
Overall tourist satisfaction	Tourists' satisfaction with the whole experience.	Available	Tourism Expenditure Survey (ISTAC)	
Tourists' satisfaction with nature, culture, sport and leisure activities.	This indicator comprises tourists' satisfaction with some of the main components of the tourism experience.	Not available		There are occasional studies such as Promotur (2023) that analyse experience ratings on Tripadvisor.
Tourists' willingness to choose more sustainable options when booking travel according to activity at destination/ willingness to spend to reduce carbon footprint according to activities.	The identification of tourist activities within the destination that result in unique tourism experiences.	Available in 2022 and 2023	Tourism Expenditure Survey (ISTAC)	
Supply and demand for nature, culture, sport and leisure activities and events.		Partially available	Tourism Expenditure Survey (ISTAC)	There are occasional studies such as Promotur (2023) that analyse experience ratings on Tripadvisor. There is data on licensed companies (the most recent listing is from September 2022); but there is no regular data on the activity of these companies.

Tourism seasonality

The Canary Islands do not have a pronounced seasonal pattern, receiving a similar number of tourists during the 12 months of the year (around 1.2 million tourists per month), which makes the islands a unique destination in the world. This lack of seasonality is due to the compensatory effect produced between the seasonal pattern and the size of the different outbound markets. In addition, the Canary Islands enjoy a mild winter with temperatures between 18ºC and 25ºC. This contrasts favourably with the climatic conditions on the European countries and with competing sun and beach destinations in the Mediterranean.

In terms of prices, the Canary Islands' high season corresponds to the winter. However, neither aggregate tourism expenditure nor total hotel receipts show significant seasonality. Monthly figures for tourism employment in activities characteristic of tourism do not show seasonality, remaining stable throughout the year. Monthly data on tourism expenditure would also be desirable. In relation to environmental sustainability, it would be desirable to have monthly data on waste generation, water and energy consumption.

The data on seasonality for the year 2022, like those for 2020 and 2021, continue to be atypical, as the figures for the first quarter of the year are low due to the fact that tourism activity was still recovering after COVID-19, which generated greater seasonality than usual on the islands.

It is important to take into account the scale of analysis when measuring seasonality, since the infra-municipal scale (local tourism destinations) reveals levels of seasonality that go unnoticed at other scales.

Seasonality indicators for hotels and apartments 2022

2022	Average daily rate (ADR)	Overnight stays	Total income
Maximum	Dec-22 €114.30	Aug-22 9.1 million	Dec-22 428 million €
Minimum	May-22 €87.23	Jan-22 5.4 million	Jan-22 265 million €

Source: Accomodation Survey (ISTAC)

Aggregated seasonal pattern by arrivals

Tourist arrivals in the Canary Islands (aggregate international and Spanish mainland tourists)

Tourist arrivals to the Canary Islands remain stable throughout the year, with values around 1.2 million tourists per month, with the difference between the maximum and minimum values being slight. It is important to note that at the beginning of 2022, the lower tourist arrivals are not related to the traditional seasonal pattern, but are due to the fact the effects of COVID-19 were still being felt, particularly in the British market.

Tourist arrivals in 2022 recorded a significant decline in the first quarter. However, the data available for the first quarter of 2023 are already at similar levels to those of 2019, so seasonality is back to normal, implying that arrivals are once again distributed fairly evenly across all months.

Source: FRONTUR-Canarias (ISTAC)

■ 2019   ■ 2022   ■ 2023

Seasonality of overnight stays and employment

Seasonality patterns of the main countries of origin
(Canary Islands, 2022)
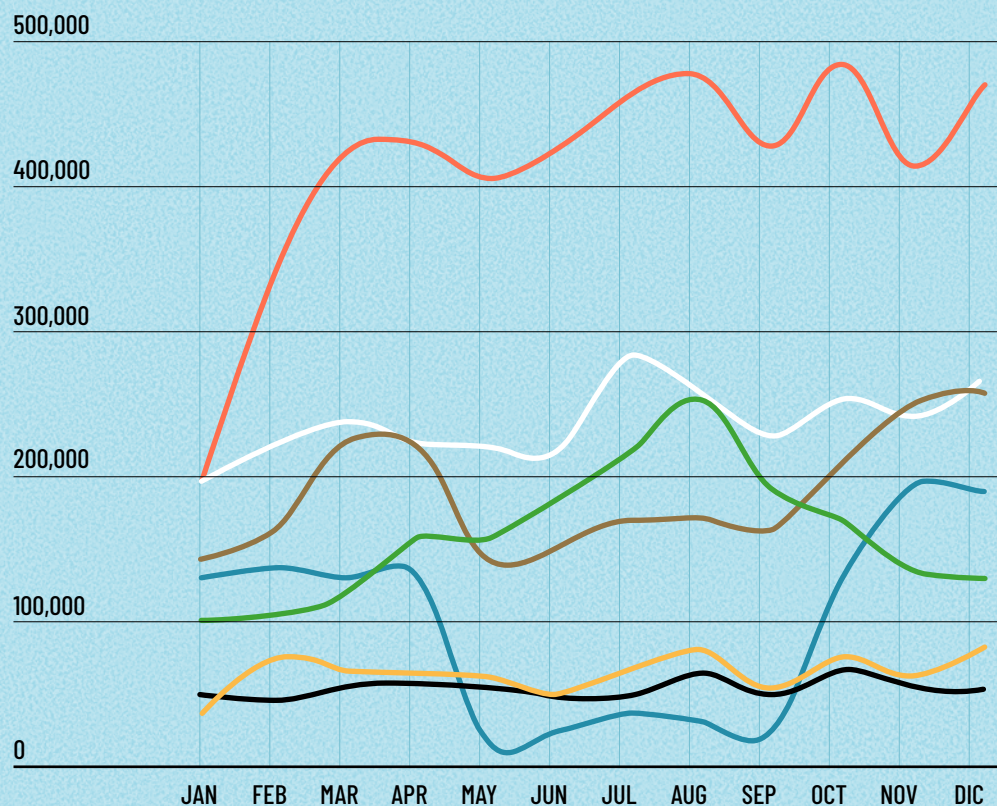
Source: FRONTUR-Canarias (ISTAC)

- United Kingdom
- Other countries
- Germany
- Mainland Spain
- Nordic Countries
- France
- Netherlands

The absence of seasonality for the Canary Islands as a whole is due to the compensatory effect produced between the seasonal patterns of the different countries of origin and their respective share of total arrivals. This is why one of the key strategies in the Canary Islands is to maintain a combination of markets, with different patterns, which in aggregate terms allow for a balanced arrival per month.

The drop in the UK in the first quarter of 2022 is linked to the persistence of the effects of COVID-19 in the UK. In 2019 (pre-pandemic year), arrivals from UK were fairly stable throughout the year. The lower number of arrivals from Germany and the Nordic countries during the summer months is compensated by the growth of arrivals from mainland Spain and other countries during this period. Finally, France and the Netherlands, smaller markets, remain relatively stable throughout the year.

Seasonality of overnight stays and employment

Overnight stays in hotels and apartments in the Canary Islands
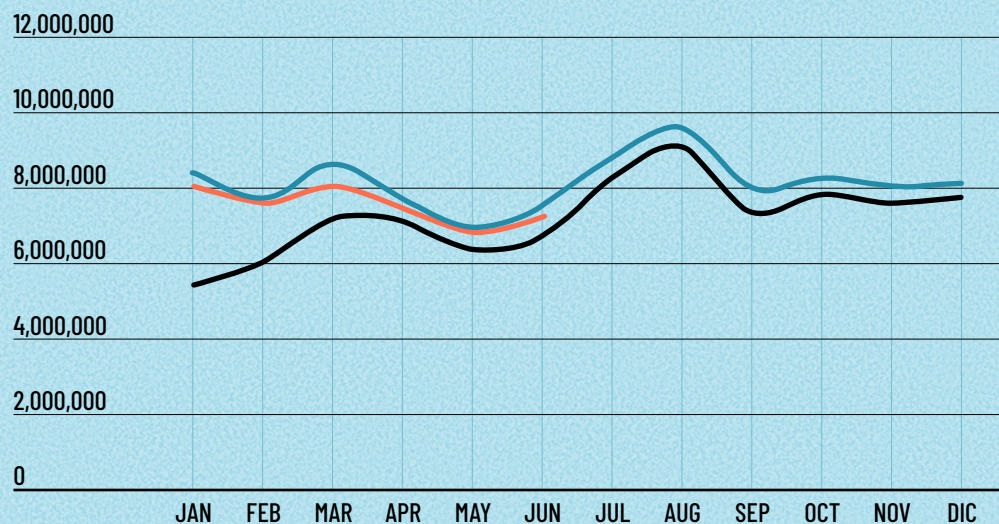
Source: Accommodation Survey (ISTAC)

■ 2019 ■ 2022 ■ 2023

Overnight stays in hotels and apartments in the Canary Islands remain fairly stable throughout the year: around 8 million overnight stays per month, with the maximum peak in August, close to 10 million, and the minimum in May, around 7 million. The data for 2022 present a more marked seasonal pattern due to the fact that in the first quarter the data are still influenced by the effects of CO-VID-19. However, the data available for 2023 show overnight stays returning to the same level as in 2019, with again a less seasonal pattern.

Affiliated to Social Security in tourism characteristic activities in the Canary Islands (2022)
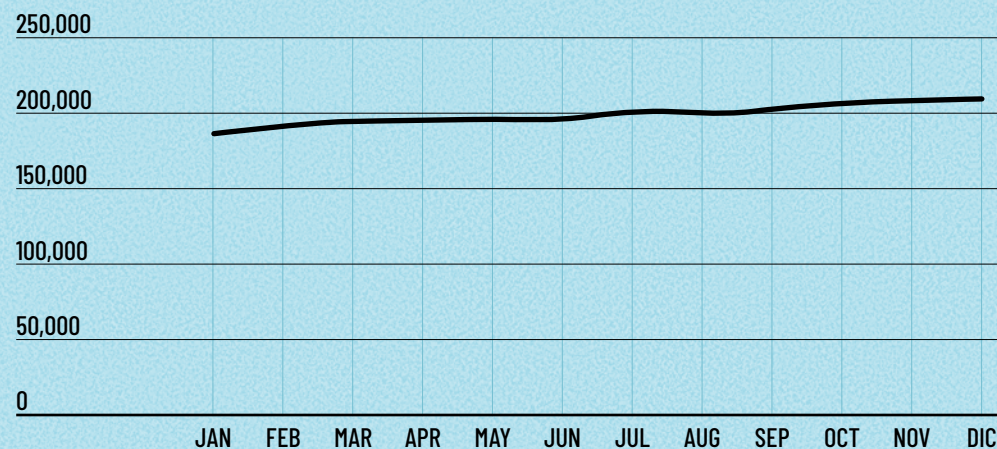
Source: Social Security Affiliation Statistics (ISTAC)

The monthly figures for tourism employment in tourism characteristic activities do not show seasonality, as Social Security registrations in activities characteristic of tourism show a slight steady growth, more marked by the post-pandemic recovery (first quarter) than by seasonality.

Seasonality of tourism expenditure and hotel and apartments revenues

Quarterly aggregate tourism expenditure in the Canary Islands (in million €)
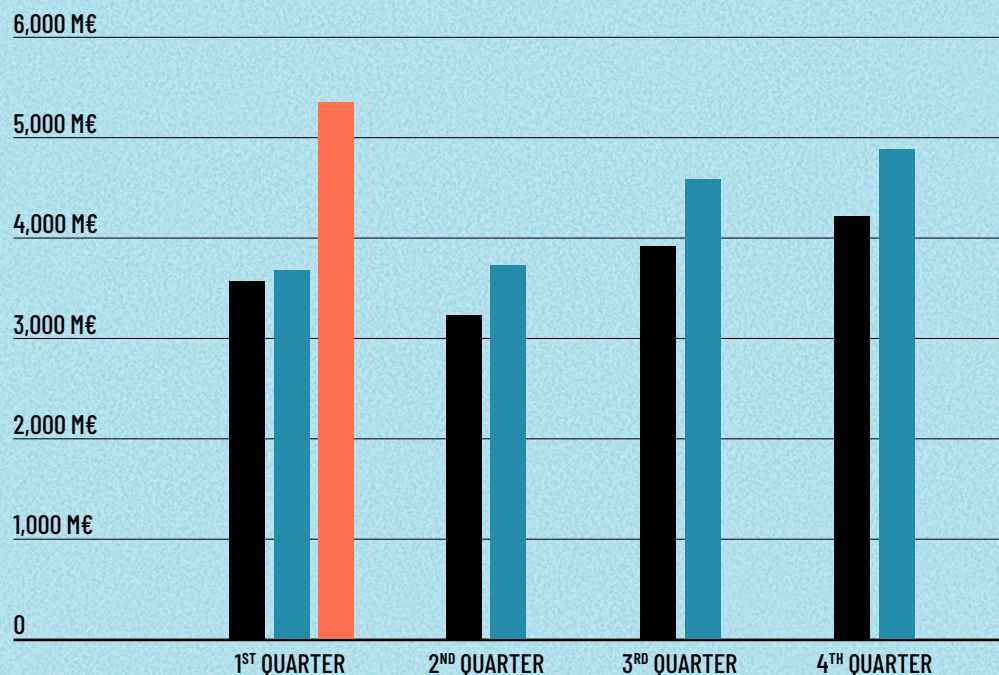
Source: Tourist Expenditure Survey (ISTAC)
■ 2019 ■ 2022 ■ 2023

A complementary way of analysing seasonality is through tourist expenditure and accommodation revenues. Both aggregate tourist expenditure and total income for hotels and apartments in the Canary Islands remain relatively stable throughout the year. The lowest values for both indicators are normally observed in the second quarter, although in the first quarter of 2022 the effects of COVID-19 are still apparent, so the data are lower than usual for that period.

Total income in hotels and apartments in the Canary Islands (in million €)
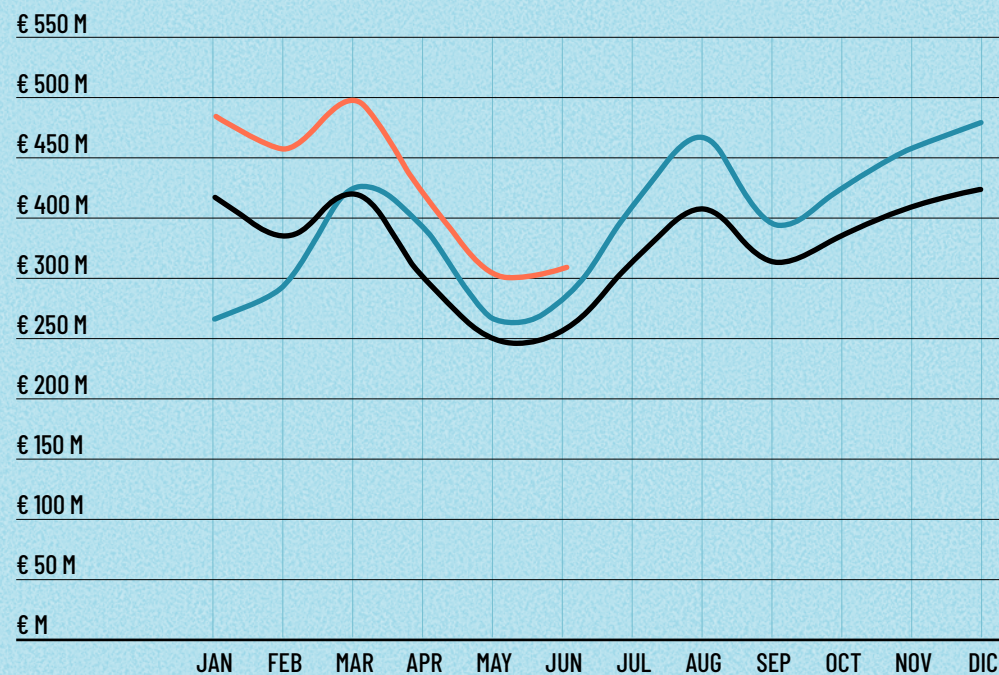
Source: Accommodation Survey (ISTAC)
■ 2019 ■ 2022 ■ 2023

Monthly data on tourism expenditure would be desirable, as this would allow for a better analysis of seasonality. It is also important to bear in mind that the growth experienced in both 2022 and 2023 has to be analysed with caution, as the values for those years are affected by inflation.

Seasonality of ADR and RevPAR

Monthly indicators of accommodation in hotels and apartments in the Canary Islands (2022)
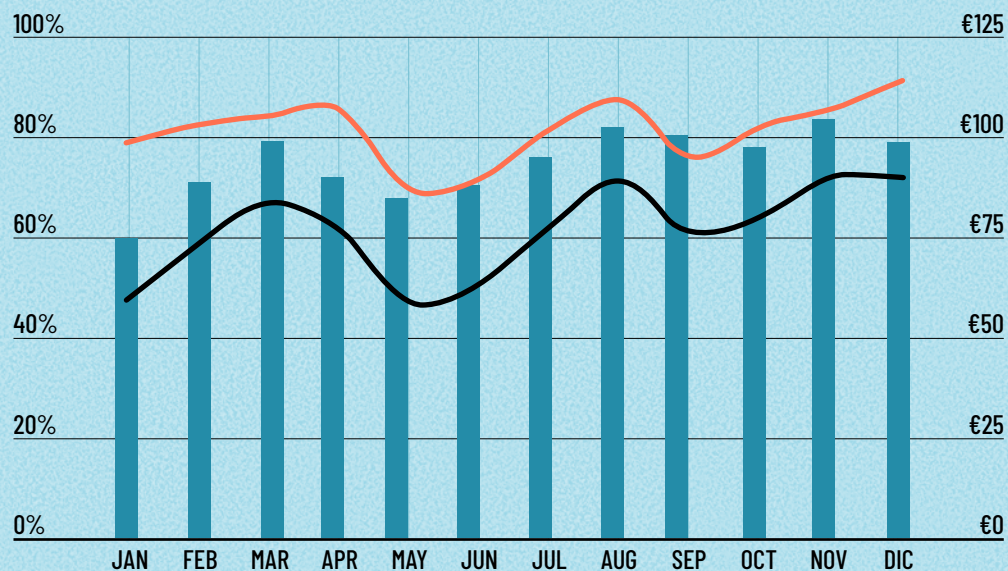
Source: Accommodation Survey (ISTAC)

- Occupancy rate by room (left axis)
- ADR (right axis)
- RevPAR (right axis)

The graph shows a certain stability in the monthly accommodation indicators throughout the year, taking into account that the first quarter is influenced by the recovery of COVID-19. This makes the figures for the first quarter, high season in the Canary Islands, lower in 2022 than usual.

Climate and seasonality

Rainfall and average temperature in the Canary Islands. Historical average
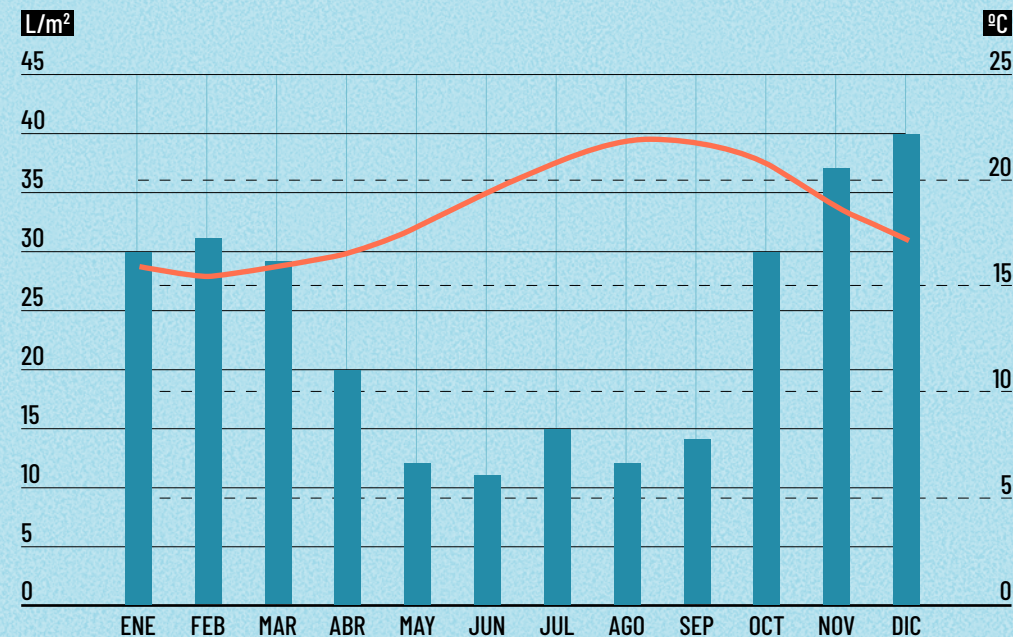
Source: Climate Data (es.climate-data.org)

- Rainfall
- Average temperature

The lack of seasonality in the Canary Islands is closely related to the islands' particular climate.
The archipelago enjoys a mild winter with average temperatures between 18ºC and 25ºC. This contrasts favourably with the climatic conditions on the European mainland and with competing sun and beach destinations in the Mediterranean.

Seasonality of arrivals, by island

Monthly distribution of annual tourists (foreign and mainland Spain) by islands, 2022
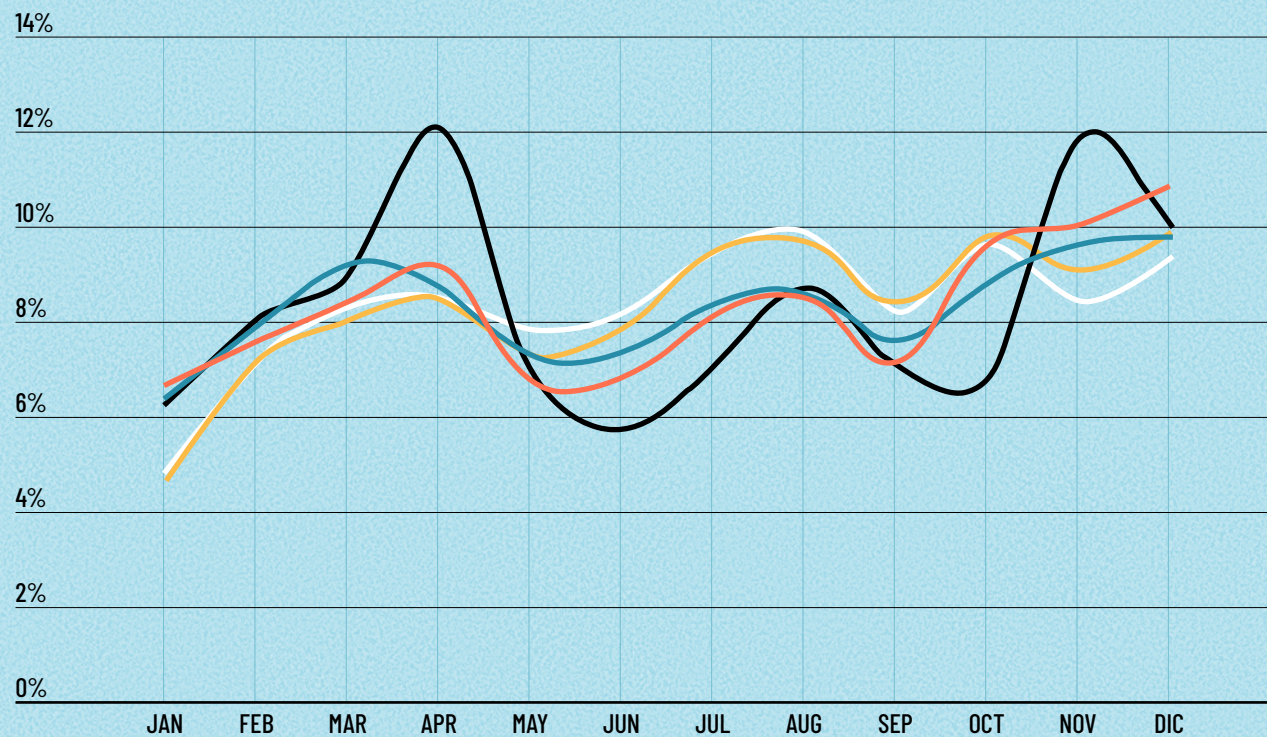
Source: FRONTUR-Canarias (ISTAC)

■ La Palma
■ Fuerteventura
■ Lanzarote
■ Gran Canaria
■ Tenerife

	Max.	Min.	DiFf.
La Palma	12.1%	5.7%	6.4%
Fuerteventura	9.8%	4.7%	5.1%
Lanzarote	9.9%	4.8%	5.1%
Gran Canaria	10.9%	6.6%	4.3%
Tenerife	9.8%	6.4%	3.4%

The graph shows how the Canary Islands do not have widespread seasonality problems. The distribution of total tourist arrivals (foreign and mainland Spain) in 2022 was fairly balanced over the 12 months of the year in all the islands (with values around 8% per year each month), with no great difference between the maximum and minimum monthly values.

However, if analysed in detail, the data between the islands differ slightly. On the one hand, Lanzarote and Fuerteventura were at their lowest in January, a month in which the effects of COVID-19 were still being felt. On the other hand, La Palma in particular shows a more pronounced seasonal pattern than the rest, as it is the island with the greatest difference between the maximum and minimum monthly values. Tenerife and Gran Canaria are islands with very low seasonality, with a more balanced distribution of arrivals, and with the smallest difference between the monthly maximum and minimum.

Seasonality of overnight stays, by islands.

Monthly distribution of annual overnight stays in hotels and apartments on each island (2022)

Source: Accommodation Survey (ISTAC)

Legend:
- La Palma
- El Hierro
- Fuerteventura
- Lanzarote
- La Gomera
- Tenerife
- Gran Canaria
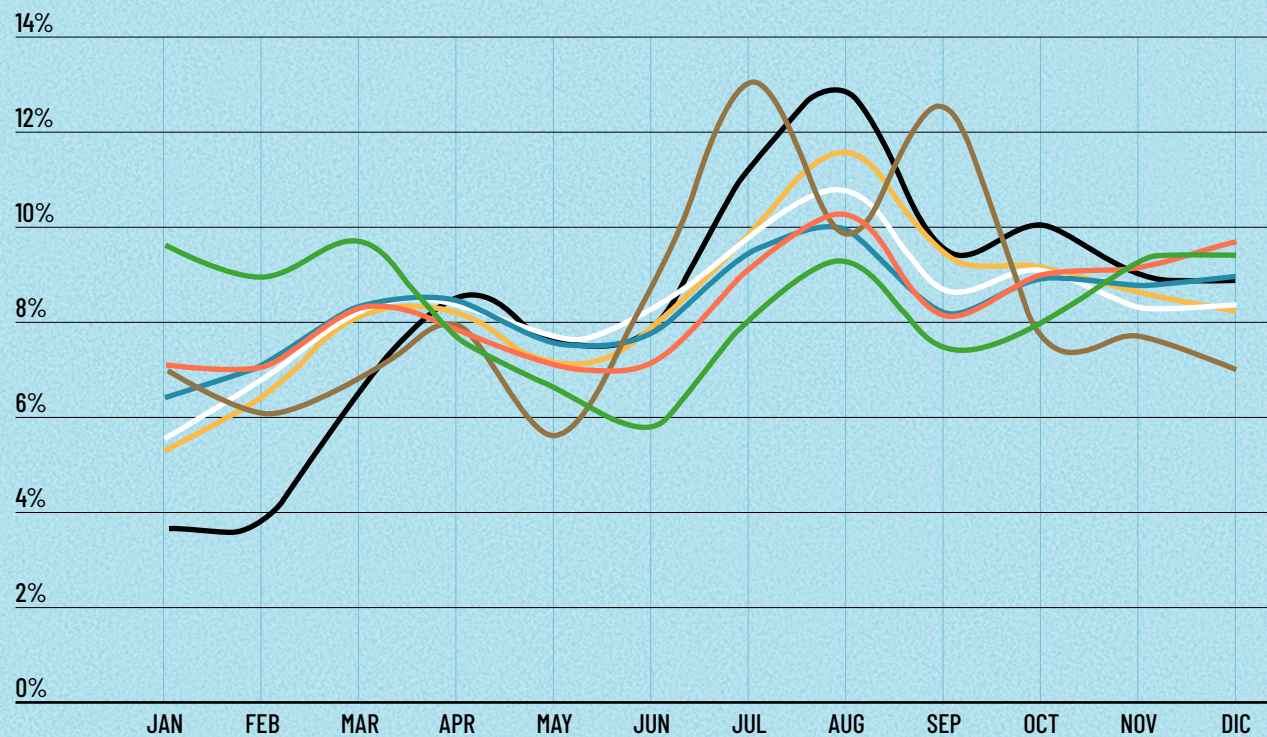
	Max.	Min.	Diff.
La Palma	12.9%	3.7%	9.2%
El Hierro	13.1%	5.6%	7.4%
Fuerteventura	11.6%	5.3%	6.3%
Lanzarote	10.8%	5.6%	5.2%
La Gomera	9.7%	5.8%	3.9%
Tenerife	9.9%	6.4%	3.5%
Gran Canaria	10.3%	7.1%	3.2%

Overnight stays in hotels and apartments show levels that vary monthly in line with those observed for arrivals, although in this case, information can be obtained for other islands, such as El Hierro and La Gomera.

The patterns of La Palma and El Hierro stand out, as they vary considerably throughout the year and show the greatest differences between the maximum and minimum values. Moreover, the data for the first months of the year are still affected by the recovery of COVID-19 and, in the case of La Palma, by the eruption of the Tajogaite volcano in September 2021.

Seasonality of overnight stays, by municipality.

Concentration of overnight stays (international, mainland Spain and Canary Islands) in hotels and apartments (2022): Gini index.

TENERIFE	0.06
Guía de Isora	0.18
Granadilla de Abona	0.09
Puerto de La Cruz	0.07
Resto de Tenerife	0.07
Arona	0.07
San Miguel de Abona	0.06
Santiago del Teide	0.06
Adeje	0.06
Santa Cruz de Tenerife	0.06
San Cristóbal de La Laguna	0.04

EL HIERRO	0.14
El Pinar de El Hierro	0.24
Frontera	0.16
Valverde	0.17

LA GOMERA	0.08
Vallehermoso	0.23
Alajeró	0.11
Valle Gran Rey	0.10
Rest of La Gomera	0.09
San Sebastian de La Gomera	0.08

LA PALMA	0.17
Rest of La Palma	0.39
Fuencaliente de La Palma	0.28
El Paso	0.26
Tazacorte	0.22
Breña Baja	0.15
Santa Cruz de La Palma	0.13
Los Llanos de Aridane	0.08

GRAN CANARIA	0.07
Las Palmas de Gran Canaria	0.09
San Bartolomé de Tirajana	0.08
Rest of Gran Canaria	0.08
Mogán	0.07

FUERTEVENTURA	0.10
Puerto del Rosario	0.28
Antigua	0.12
Pájara	0.11
La Oliva	0.10
Tuineje	0.09

LANZAROTE	0.08
Haría	0.15
Teguise	0.12
Arrecife	0.11
Yaiza	0.09
Tías	0.07

Note 1: The Gini Index measures the level of concentration on a scale ranging from 0 to 1, where 0 represents an even distribution or no concentration, while 1 represents maximum concentration. Applied to the seasonality of overnight stays, a value of 0 would imply that every month of the year would have the same number of overnight stays, no seasonality; while a value of 1 means that a single month would concentrate all overnight stays, maximum seasonality.

Note 2: Data for the "rest of the island" are not published for all islands.

Source: Own elaboration based on the Accommodation Survey (ISTAC)

Seasonality of overnight stays, by micro-destinations

Concentration of overnight stays (international, mainland Spain and Canary Islands) in hotels and apartments (2022): Gini index.

TENERIFE	0.06	GRAN CANARIA	0.07	FUERTEVENTURA	0.10	LANZAROTE	0.08
Costa del Silencio	0.25	Bahía Feliz – Playa del Águila	0.15	Caleta de Fuste	0.20	Costa Teguise – Interior	0.15
Torviscas – Fañabé Alto	0.12	Sonnenland	0.13	Corralejo	0.12	Puerto Calero	0.12
Callao Salvaje	0.11	Taurito	0.10	Costa Calma	0.12	Costa Teguise – Litoral	0.11
Playa Jardín – Maritim	0.09	Tauro – Playa El Cura	0.10	El Cotillo	0.12	Rubicón – Papagayo	0.10
Conjunto Histórico	0.09	Puerto de Mogán	0.09	Esquinazo – Butihondo	0.10	La Tiñosa	0.09
Rest of Tenerife	0.09	Playa del Inglés	0.09	Morro Jable	0.10	Playa Blanca	0.08
El Médano	0.09	San Agustín	0.09	Rest of Fuerteventura	0.09	Montaña Roja	0.08
Martiánez	0.09	Las Canteras	0.09	Solana Matorral	0.08	Matagorda – Los Pocillos	0.08
Los Cristianos	0.07	Puerto Rico	0.08			Rest of Lanzarote	0.06
Las Américas – Arona	0.07	Campo Internacional	0.07			Playa Grande	0.06
Puerto Santiago	0.07	Rest of Gran Canaria	0.07				
Playa Paraiso	0.07	El Beril – Las Burras	0.07				
Costa Adeje	0.07	Meloneras	0.07				
Taoro – La Paz	0.07	Amadores	0.07				
Golf del Sur	0.06	Patalavaca – Arguineguín	0.06				
Los Gigantes	0.06						
Las Américas -Adeje	0.06						
Playa de El Duque	0.05						

Note: The Gini Index measures the level of concentration on a scale ranging from 0 to 1, where 0 represents an even distribution or no concentration, while 1 represents maximum concentration. Applied to the seasonality of overnight stays, a value of 0 would imply that every month of the year would have the same number of overnight stays, i.e. no seasonality; whereas a value of 1 would indicate that a single month would have all overnight stays, i.e. maximum seasonality.

Source: Accommodation Survey (ISTAC)

Checklist of main indicators of issue area 2:
Tourism seasonality

Indicator	Description	Availability	Source	Remarks
Tourism demand in high season and low season.	This analysis should be carried out for tourist arrivals, overnight stays, expenditure, average daily rate (ADR), revenue per available room (RevPAR) and occupancy rates.	Available	Accommodation Survey (ISTAC) Tourism Expenditure Survey (ISTAC) Frontur Canarias (ISTAC)	
Seasonality according to country of residence.	Analysis of detailed seasonal patterns for demand segments, particularly with regard to countries of origin.	Available	Accommodation Survey (ISTAC) Tourism Expenditure Survey (ISTAC) Frontur Canarias (ISTAC)	
Seasonality of islands and municipalities.	Analysis of seasonality patterns for main tourism islands, municipalities and local destinations (micro-destinations).	Partially available	Accommodation Survey (ISTAC) Tourism Expenditure Survey (ISTAC) Frontur Canarias (ISTAC)	No monthly data are published for local tourism destinations (micro-destinations).

4.3 Air transport connectivity and intermediation

The Canary Islands have 8 airports. Of these, 5 are among the top 13 in Spain. Canary Island airports thus generate 18% of passenger arrivals in Spain. Of these, Gran Canaria airport has the highest number of arrivals, with 6.2 million in 2022 (AENA, 2022). In the case of Tenerife South, it is 5.7.

Ryanair is the main airline operating in the islands by volume of international passengers; in the year from Oct. 2022 to Oct. 2023, it offered 3.2 million seats, followed by Jet2 and the TUI group, with 2.2 million each, Easyjet, with 1.7 million and Condor, with almost 0.9 million (Cirium, 2022).

The United Kingdom is the country from which there are the largest number of routes with Canary Islands airports: 35 routes in 2022, followed by France, with 32 routes and Germany with 30 routes, according to AENA data.

From October 2022 to October 2023, international flights arrived in the Canary Islands from 29 countries and 117 different airports of origin. To these flights, 24 airports in mainland Spain and the Balearic Islands must be added. All this international traffic was generated by 54 airlines. The airports of origin from which most tourists were received were Madrid, Manchester, London-Gatwick, Barcelona and London-Stansted. Restricting the analysis to connections between an airport of origin, the figure reaches 324 connections. Each connection can be operated by more than one airline, with a total of 576 routes (origin airport, destination airport and airline) (Source, Cirium, 2023). The international route with the highest passenger volume was the one between London-Gatwick and Tenerife South, operated by the airline Easyjet, with 208,000 passengers in one year.

The international route with the highest passenger volume was the one between London-Gatwick and Tenerife South, operated by the airline Easyjet, with 208,000 passengers in one year.

The Canary Islands has a high dependence on tour operators. In 2022, 47.8% of tourists purchased package holidays and 34.9% of tourists booked all-inclusive holidays

The average stay of tourists who travel without a package is longer (10 days) than those who travel with a package (8.5 days) (ISTAC, 2022).

Main airlines on international flights to the Canary Islands by capacity (million seats), October 2022 – October 2023

Airline	Capacity (million seats)
RYANAIR	~3.2
JET2.COM	~2.25
GRUPO TUI	~2.25
EASYJET	~1.7
CONDOR	~0.9
EUROWINGS	~0.5
TRANSAVIA	~0.45
CORENDON AIRLINES	~0.3
NORWEGIAN	~0.3
WIZZ AIR	~0.3

Axis: 0 0.5 1 1.5 2 2.5 3 3.5

Note: statistics are on seats, not passengers
Source: Cirium, taken from Promotur

Passenger arrivals at the main airports in Spain in 2022

- Madrid – Barajas 25,536,230
- Barcelona – El Prat 20,914,179
- Palma de Mallorca 14,278,391
- Rest 13,116,296
- Málaga – Costa del Sol 9,237,430
- Gran Canaria 6,264,621
- Alicante – Elche 6,612,678
- Tenerife Sur 5,478,352
- Ibiza 4,074,151
- Valencia 4,062,293
- Lanzarote 3,704,585
- Sevilla 3,393,577
- Fuertev. 2,864,191
- Tenerife N. 2,777,004

Source: AENA

Main connections from international airports to airports in the Canary Islands

The United Kingdom is the country from which there are the largest number of routes with Canary Islands airports: 35 routes in 2022, followed by France, with 32 routes and Germany with 30 routes, according to AENA data.
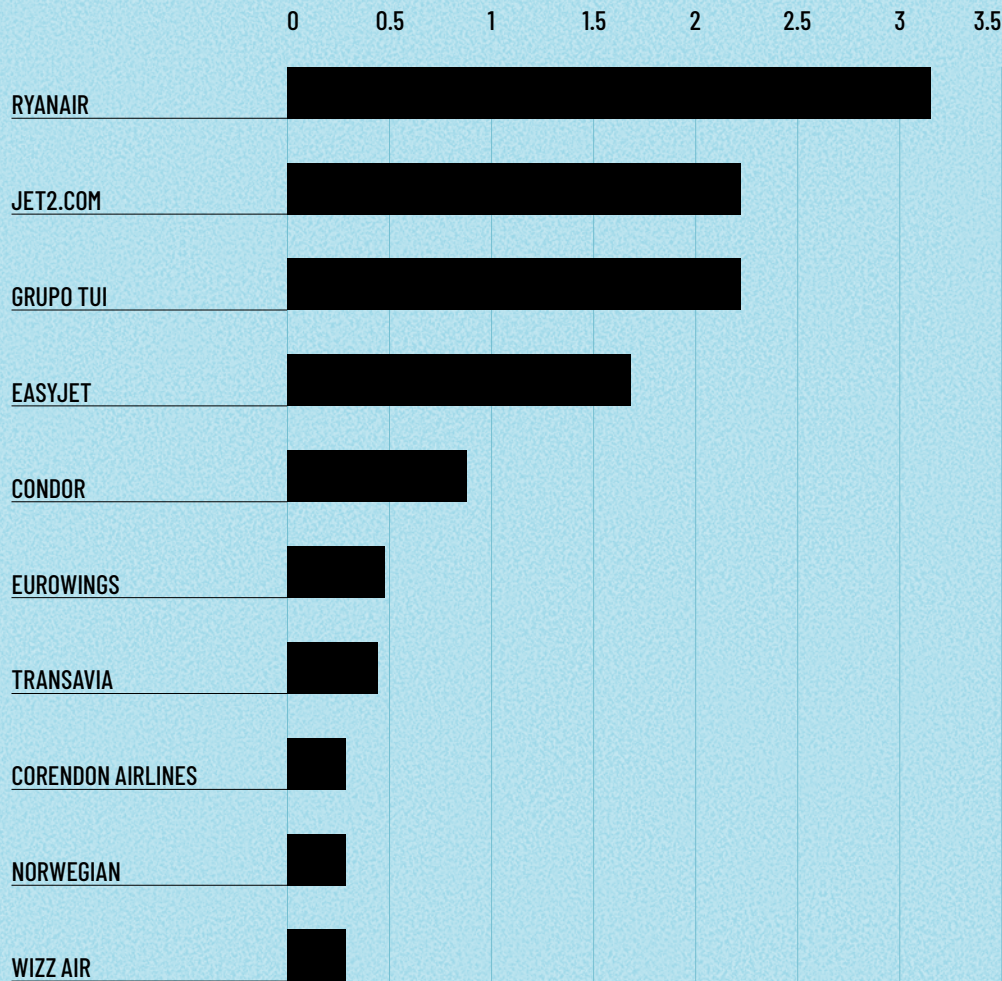
The main international route by number of passengers in 2022 is Manchester Airport/Tenerife South. In this case, arrivals amounted to 416,432 passengers, according to AENA data. The main route to Lanzarote airport also comes from this English airport (231,029 passengers). In Gran Canaria, the main route by passenger volume is from Amsterdam Schiphol (185,370 passengers). In the case of Fuerteventura, the main route comes from Düsseldorf.

Passenger arrivals at Canary Island airports on international routes with more than 100,000 passengers in 2022
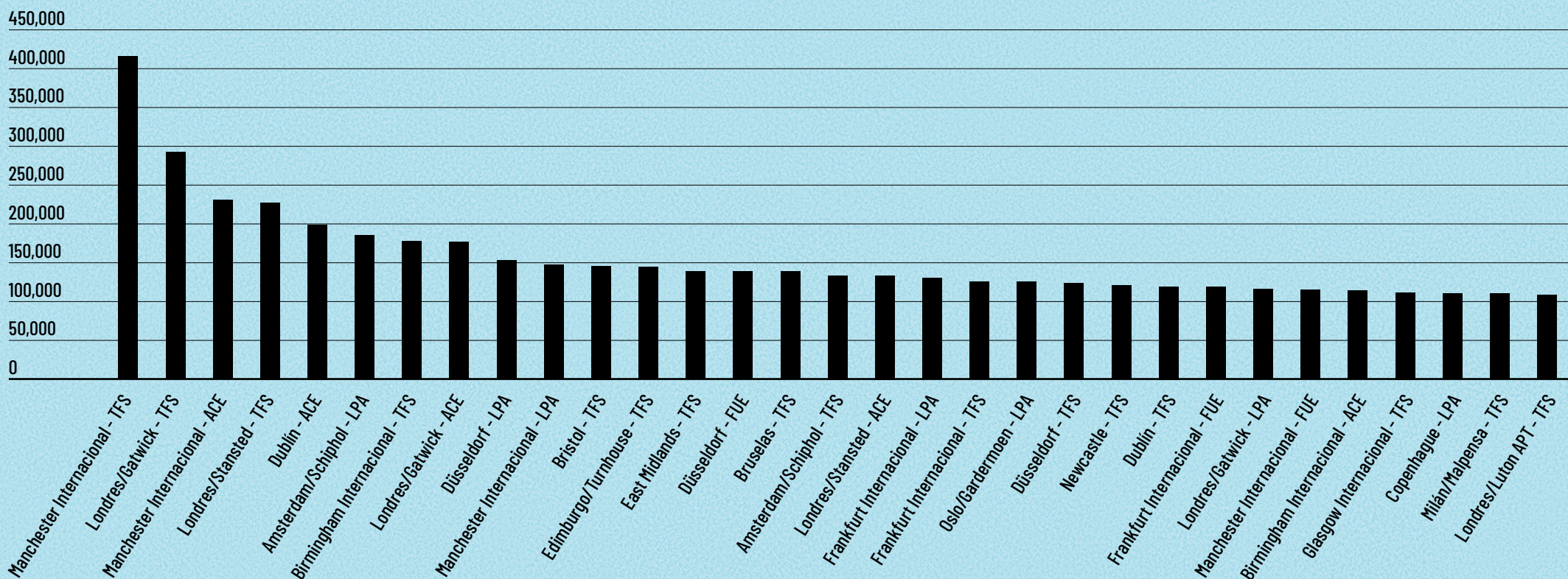
Source: AENA

Connectivity during the year covering the winter season 2022-2023 and summer season 2023

From October 2022 to October 2023, international flights arrived in the Canary Islands from 29 countries and 117 different airports of origin. To these flights, 24 airports in mainland Spain and the Balearic Islands must be added. All this international traffic was generated by 54 airlines. The airports of origin from which most tourists were received were Madrid, Manchester, London–Gatwick, Barcelona and London–Stansted. Restricting the analysis to connections between an airport of origin, the figure reaches 324 connections. Each connection can be operated by more than one airline, with a total of 576 routes (origin airport, destination airport and airline) (Source, Cirium, 2023). The international route with the highest passenger volume was the one between London–Gatwick and Tenerife South, operated by the airline Easyjet, with 208,000 passengers in one year.
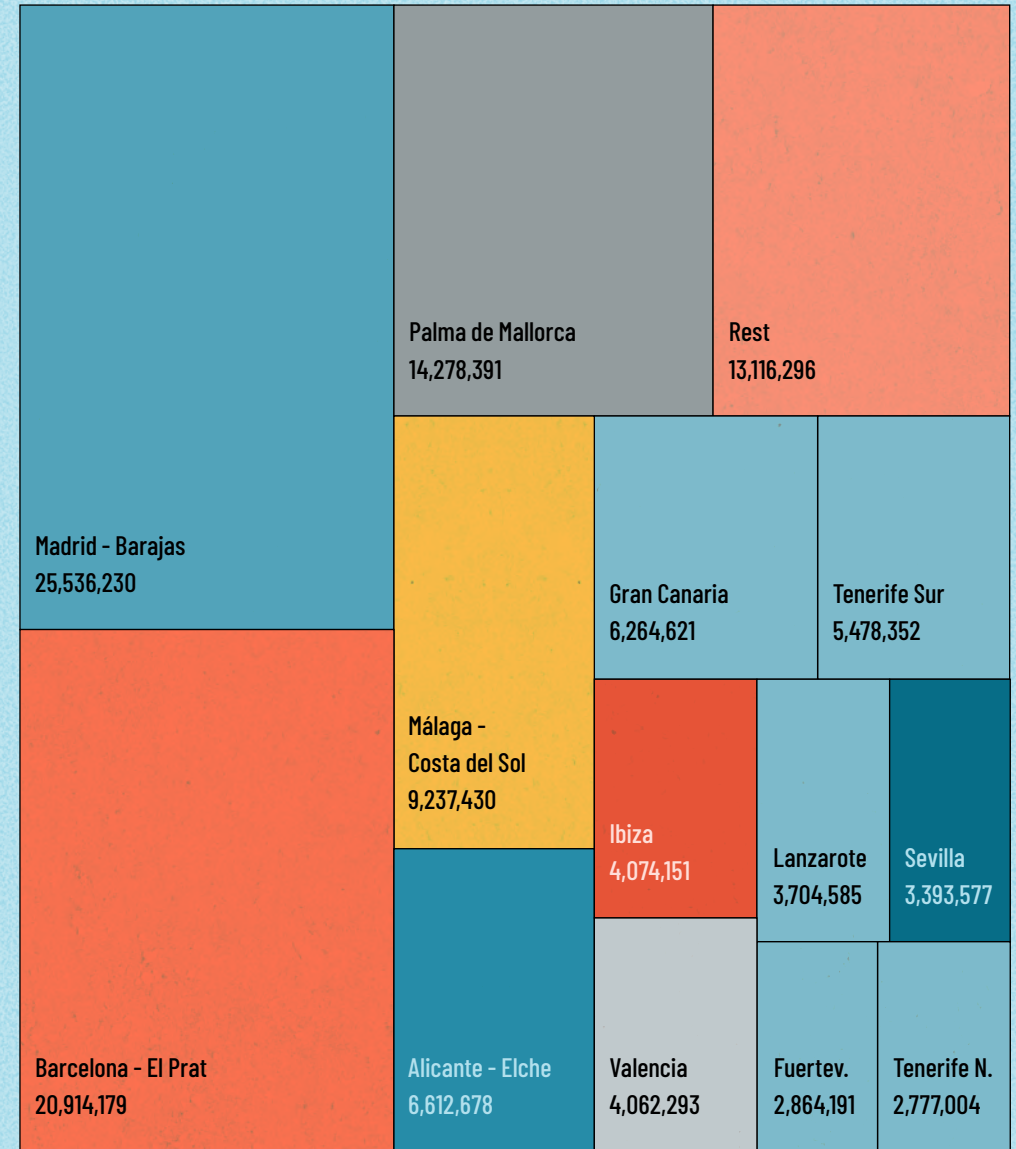
Air destinations by number of seats (mainland Spain and abroad)

Destination	Seats
Madrid	2,562,886
Manchester	1,100,625
London/Gatwick	931,474
Barcelona	929,982
London/Stansted	665,689
Dublín	565,235
Düsseldorf	563,183
Birmingham	519,906
Frankfurt	495,671
Bristol	476,034

Source: Cirium. Taken from Promotur

Main international routes and airlines, by number of seats

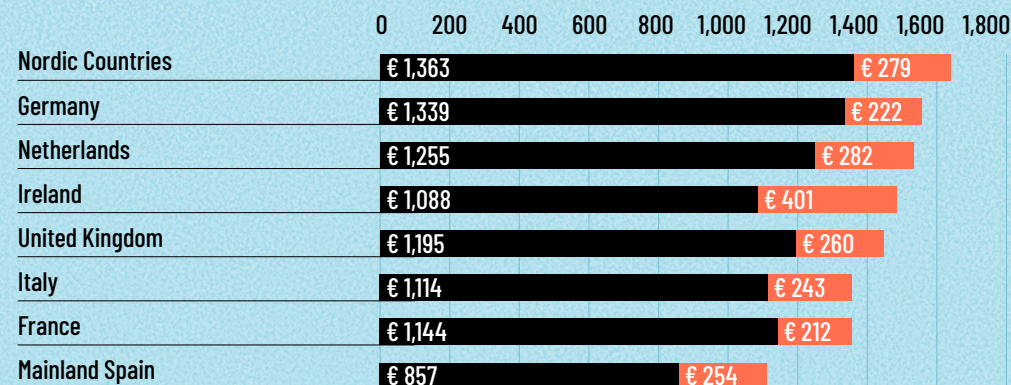| Route	Seats
London/Gatwick - TFS (Easy Jet UK Limited)	208,104
Manchester - TFS (Jet2.com Limited)	204,842
London/Gatwick - ACE (Easy Jet UK Limited)	160,111
London/Stansted - TFS (Ryanair)	149,281
Dublín - ACE (Ryanair)	141,386
Manchester - ACE (Jet2.com Limited)	125,895
London/Stansted - TFS (Jet2.com Limited)	120,899
Birmingham - TFS (Jet2.com Limited)	117,793
Dublín - ACE (Aer Lingus Limited)	101,831
Leeds/Bradford - TFS (Jet2.com Limited)	93,933

Source: Cirium. Taken from Promotur

Use of package tours and expenditure

High dependence on tour operators. In 2022, 47.8% of tourists purchased package holidays; 70.4% of tourists from Nordic countries purchased package holidays; 64.1% of tourists from Germany; 55.9% from the United Kingdom and 17.3% of tourists from the mainland (Promotur, based on the ISTAC Tourist Expenditure Survey, 2022).

34.9% of tourists booked all-inclusive holidays in 2022: 43.3% of tourists from Germany, 40.7% of tourists from the UK and 28.7% of Nordic tourists. Spending per tourist is higher among package holidaymakers (€1,492) compared to non-package holiday makers (€1,152). In the case of tourists who travel with a package tour, the expenditure per tourist on other items amounts to €256, while the expenditure on other items is much higher among tourists who travel without a package tour (€436).

With regard to places of residence, Nordic tourists are those who spend the most per tourist, with very notable differences in spending on other items, depending on whether the trip is made with a package (€279) or without a package (€591) (Promotur based on EGT, ISTAC, 2023).

Spending per trip of package tourists in 2022

	Expenditure per trip in the package	Expenditure per trip on other items
Nordic Countries	€ 1,363	€ 279
Germany	€ 1,339	€ 222
Netherlands	€ 1,255	€ 282
Ireland	€ 1,088	€ 401
United Kingdom	€ 1,195	€ 260
Italy	€ 1,114	€ 243
France	€ 1,144	€ 212
Mainland Spain	€ 857	€ 254

Source: Promotur, based on Tourist Expenditure Survey (ISTAC).

- ■ Expenditure per trip in the package
- ■ Expenditure per trip on other items

Spending per trip by non-package tourists in 2022

	Flight expenditure	Expenditure on accommodation	Expenditure on other items
Nordic Countries	€ 477	€ 411	€ 591
Ireland	€ 394	€ 512	€ 496
Germany	€ 379	€ 478	€ 504
Netherlands	€ 356	€ 450	€ 451
United Kingdom	€ 304	€ 447	€ 436
France	€ 297	€ 424	€ 432
Italy	€ 285	€ 307	€ 439
Mainland Spain	€ 210	€ 286	€ 311
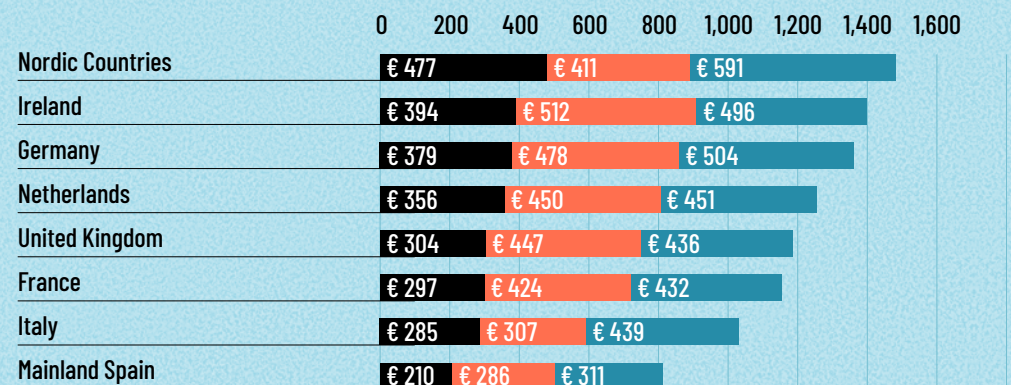
Source: Promotur, based on Tourist Expenditure Survey (ISTAC).

- ■ Flight expenditure
- ■ Expenditure on accommodation
- ■ Expenditure on other items

Average stay of tourists by package use

In terms of average stay, tourists travelling without a package have a longer average stay. This is reflected in the total average stay in the Canary Islands, where tourists travelling without a package have an average stay of 10 days, while those travelling with a package have an average stay of 8.5 days.

- **Nordic countries:** the average stay of tourists travelling with a package is 8.7 days and 13.7 days for those travelling without a package.
- **Germany:** the average stay of those travelling with a package is 9.9 days and 13.5 days for those travelling without a package.
- **United Kingdom:** the average stay is 7.9 days for tourists who travel with a package and 9.5 days for those who do not travel with a package.
- **Mainland:** 6.6 days for tourists who travel with a package and 7.1 days for those who travel without a package (Promotur based on data from the ISTAC Tourist Expenditure Survey, 2022).

Average stay of package and non-package tourists in 2022
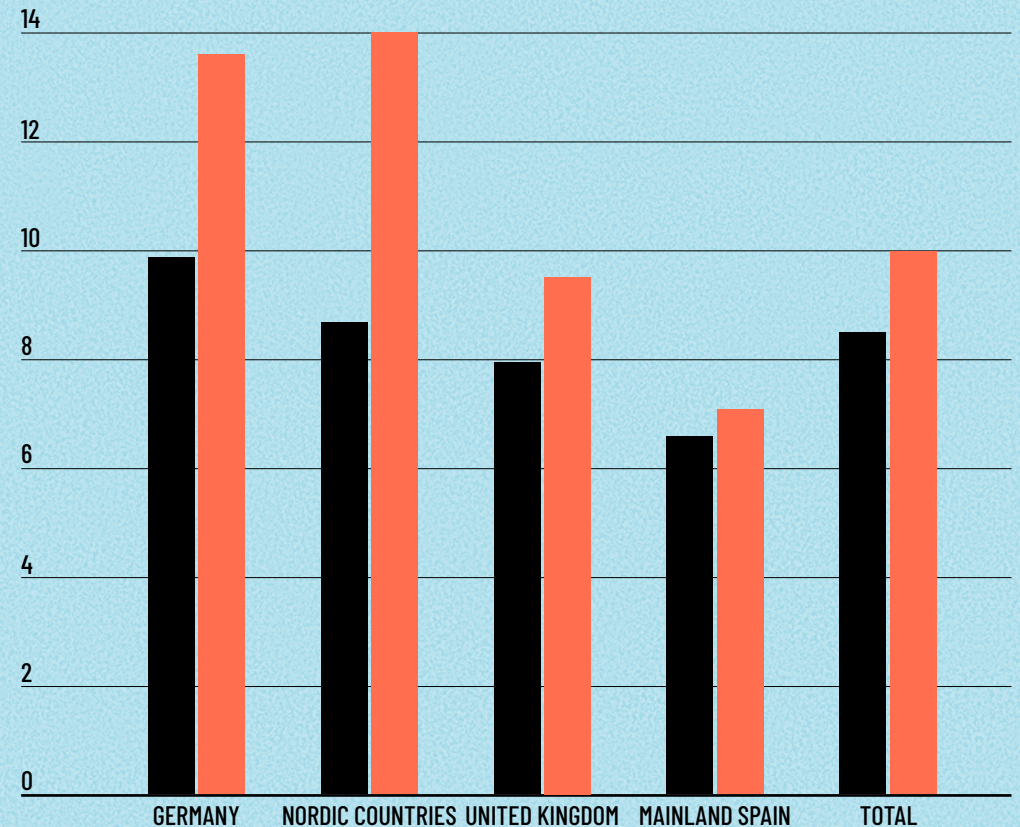
Source: Tourist Expenditure Survey (ISTAC)

■ With package tour
■ Without package tour

Checklist of main indicators of issue area 3:
Air transport connectivity and intermediation

Indicator	Description	Availability	Source	Remarks
Number and frequency of routes and volume of passengers from abroad to Canary Islands airports / Passenger volume according to main routes	Connectivity to a large number of airports is a crucial factor for the competitiveness of the tourism sector.	Available	AENA	
The share of distribution channels and number of operators	Percentage of tourists using package tours, OTAs and direct purchase of tourism products and number of intermediaries and airlines	Partially available	Tourism Expenditure Survey (ISTAC)	
Monthly scheduled capacity of airlines	Airline capacity is measured through landing slots, as a way of forecasting tourism trends in an airline-dependent region.	Available	AENA	

Destination innovation, economic impacts and benefits

GDP per capita (2021)

Source: INE

Evolution of tourism GDP at current prices in the Canary Islands (in Millions of €)

Source: Impactur (Exceltur and Government of the Canary Islands)

In the Canary Islands, GDP per capita in 2021 was €18,990, much lower than GDP per capita in Spain (€25,498) and GDP per capita in the EU–27 (€32,430). After the fall in tourism GDP in the Canary Islands during the years of the international financial crisis from 2007 onwards, growth resumed in 20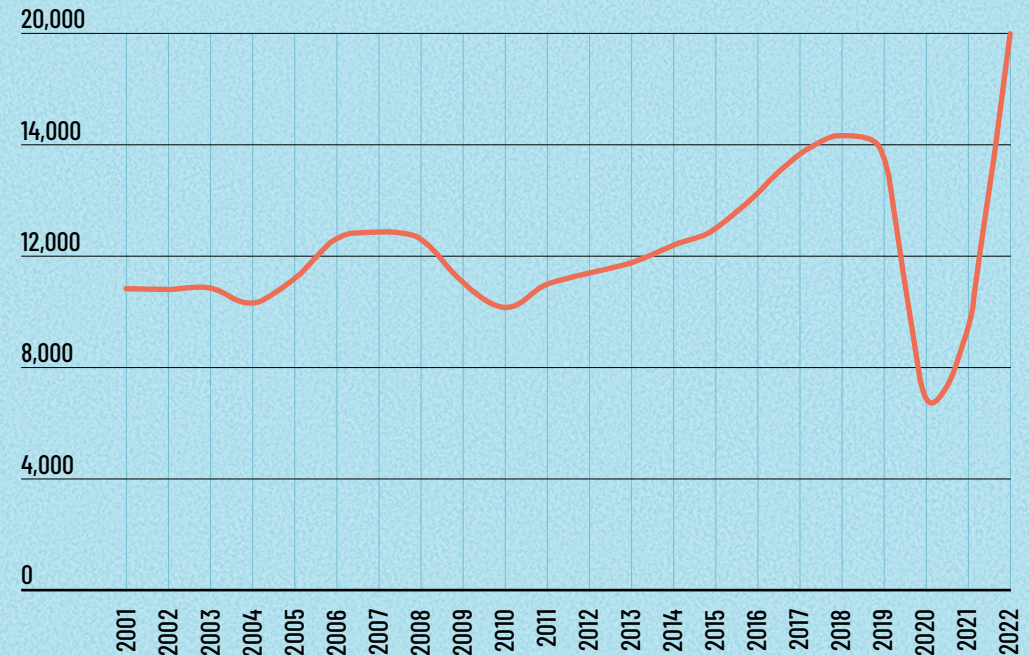10. In the period between 2010 and 2019, driven by, among other factors, the political instability in the Mediterranean as a result of the Arab Spring, tourism recorded very strong growth. In 2018, tourism contributed more than 16 billion euros to the Canary Islands' GDP, a figure that fell slightly in 2019, which was also considered a great year for tourism in economic terms. However, the COVID–19 crisis led to a 56% drop in tourism GDP in 2020, to €6,885 million. In 2021, the recovery of tourism GDP was still timid, to €9,420 million. However, the year 2022 was the confirmation of the recovery from pre–pandemic levels, with a tourism GDP of €19,961 million, which represented 35.5% of the equivalent aggregate for the Canary Islands as a whole. All these figures are at current prices and, due to inflation, overestimate the evolution of tourism. In any case, the figures on tourism GDP published by the Government of the Canary Islands and Impactur, measured at constant prices, are 15.7% higher in 2022 than in 2019.

Tourism expenditure, explanation of its evolution

Tourism expenditure in the quarter before the start of the COVID-19 pandemic amounted to approximately 3.4 billion euros, which was 5% less than in the same period of the previous year. Since the 3rd quarter of 2022, historical records for aggregate tourist expenditure have been observed. In the first quarter of 2023, the record figure of 5,353 million euros at current prices was reached, due to the effect of a favourable tourism situation and inflation.

Between 2010 and 2022, aggregate tourism expenditure (at current prices) increased by 96%. Looking at the behaviour of each of its components, the growth in the number of tourists accounted for 58% of this growth; the increase in prices during those twelve years accounted for 24% of the recorded growth; while the expenditure per tourist at constant prices accounted for only 18% of the recorded increase in aggregate expenditure. At constant prices, the annual growth of expenditure per tourist in the Canary Islands between 2010 and 2022 was 1.1% per year.

Aggregate quarterly tourism expenditure at current prices of foreigners and mainlanders visiting the Canary Islands. Millions of €.
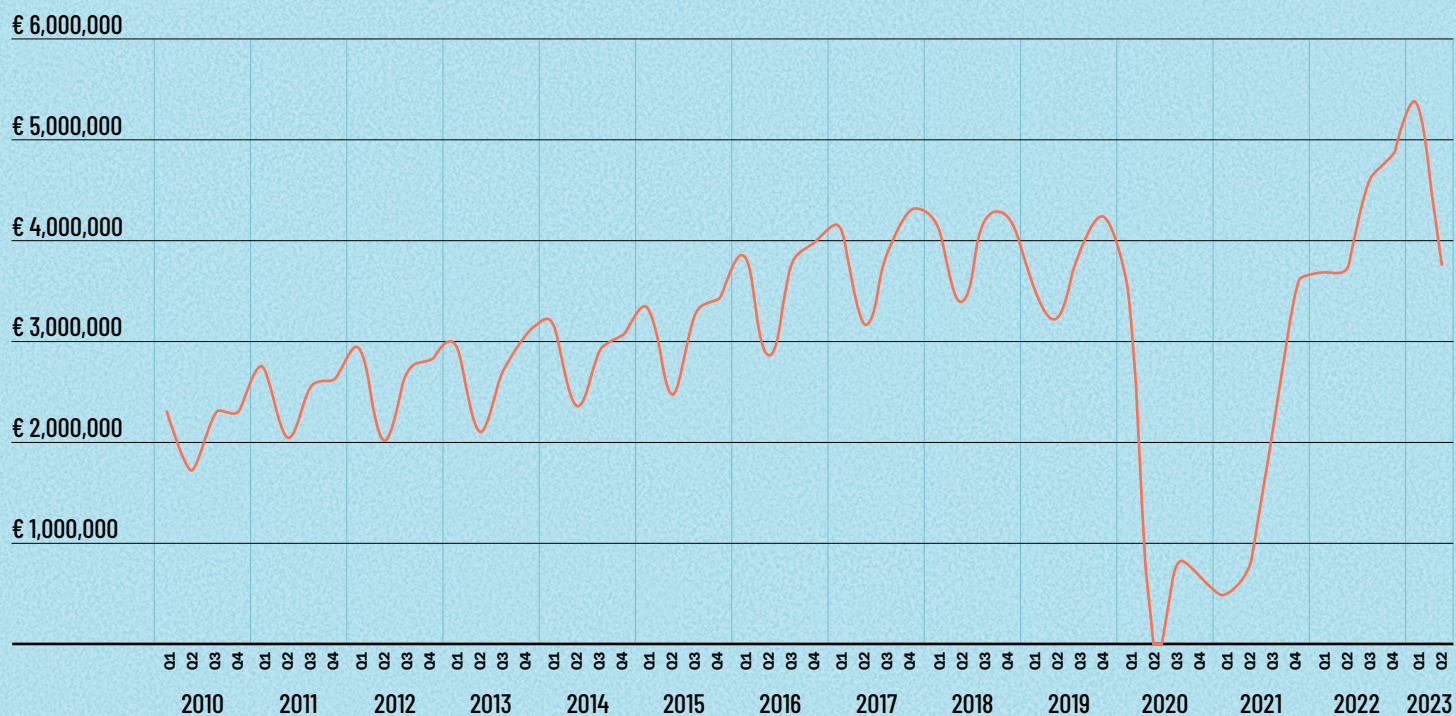
Source: Tourism Expenditure Survey (ISTAC)

Contribution to the growth of the components of aggregate tourism expenditure in the period 2010 to 2022 in the Canary Islands

24% General CPI of the Canary Islands

58% Number of tourists

18% Expenditure per tourist a constant prices
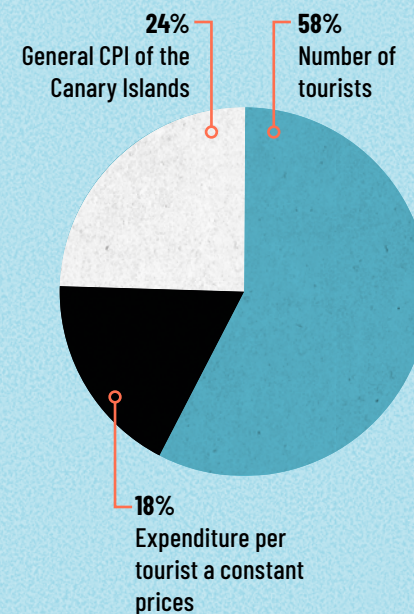
Source: Tourism Expenditure Survey (ISTAC)

Evolution of expenditure per tourist per day. Base year: 2010
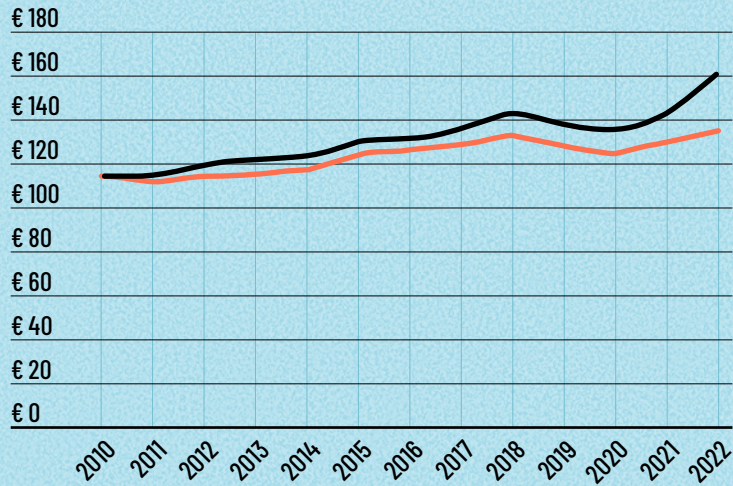
Source: Tourism Expenditure Survey (ISTAC)

■ Current prices
■ Constant prices

Evolution of aggregate annual tourism expenditure (million €). Base year: 2010
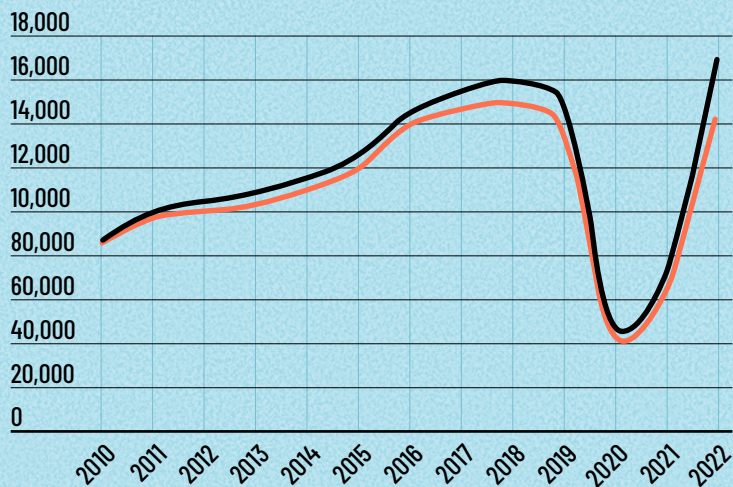
Source: Tourism Expenditure Survey (ISTAC)

■ Current prices
■ Constant prices

Although the daily expenditure per tourist (including international and foreign) at constant prices has risen in 2022 compared to the pre-pandemic period, at constant prices, the aggregate expenditure generated by tourism in 2022 is 3–5% lower than in the pre-pandemic years. Inflation in recent years is distorting some information about the reality of tourism, so constant prices should be used.

Between 2010 and 2022, the relative weight of accommodation is increasing until it accounts for 43.5% of total expenditure in 2022, i.e. three points more than in 2010. As for expenditure on air transport, its share of total tourism expenditure remains stable at around 27%. The category under which "other expenditure" other than transport and accommodation is grouped has decreased from 32.5% to 29%. It is important to monitor this last figure, since this expenditure is the one that most affects and is distributed in the destination from both a social and territorial point of view. In the first half of 2023 there was a 16.7% real growth in tourism expenditure in the Canary Islands, partly related to the fact that the first quarter of 2022 was still affected by the restrictions maintained by the United Kingdom due to the pandemic.

Evolution of total tourism expenditure at constant prices, by concept. Millions of euros.
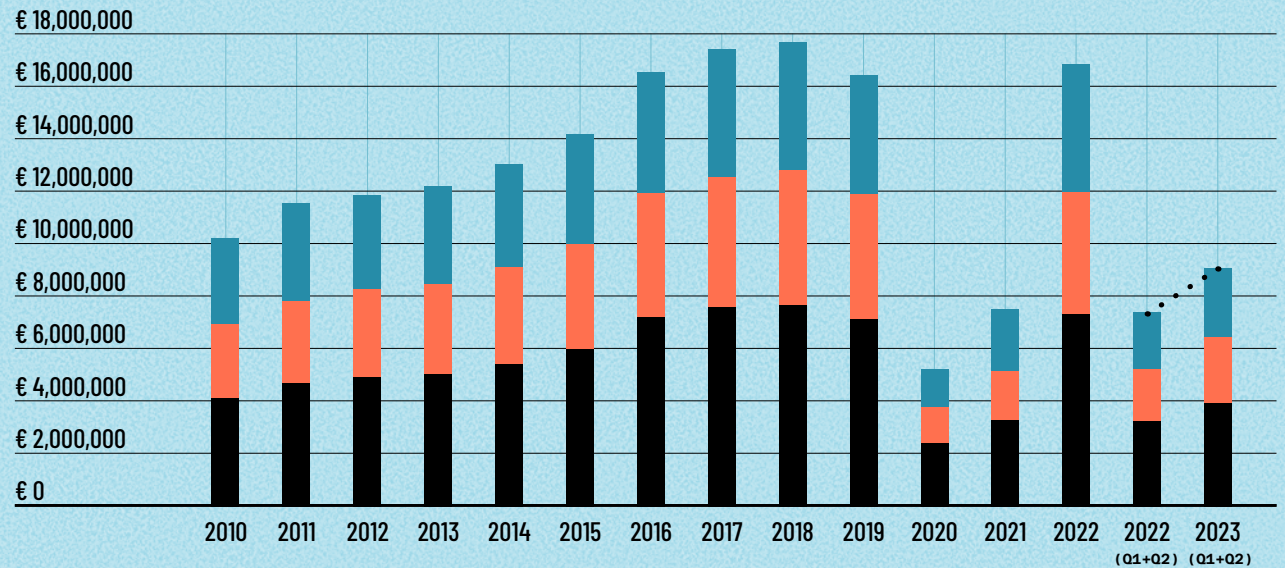
Source: Tourist Expenditure Survey (ISTAC)

■ Accommodation
■ Transport
■ Rest

Contract contribution groups

In September 2022, engineers and graduates (senior management staff), and technical engineers and surveyors accounted for 15% of social security contributors in the economy as a whole; in the case of tourism, these two contribution groups together accounted for only 2% of enrolment.

Distribution of workers by contribution groups in activities characteristic of tourism and in the Canary Islands economy as a whole. September 2022

	0%	5%	10%	15%	20%	25%	30%	35%	40%

ENGINEERS AND GRADUATES. SENIOR MANAGEMENT STAFF

TECHNICAL ENGINEERS, EXPERTS AND QUALIFIED ASSISTANTS

ADMINISTRATIVE AND WORKSHOP MANAGERS

NON-GRADUATE ASSISTANTS

ADMINISTRATIVE OFFICERS

SUBORDINATES

ADMINISTRATIVE ASSISTANTS

FIRST AND SECOND OFFICERS

THIRD AND SPECIALIST OFFICERS

LABOURERS

■ TOTAL   ■ TOURISM

Source: Social Security Enrolment Statistics (ISTAC).

R&D investment

Innovation in the Canary Islands presents notable weaknesses. In terms of per capita expenditure on internal R&D in 2021, the Canary Islands is the autonomous region with the lowest expenditure (€105.9) together with the autonomous cities of Ceuta and Melilla. Spain: €363.66 (INE, 2021).

Domestic R&D spending per capita, 2021

| | € 0 | € 100 | € 200 | € 300 | € 400 | € 500 | € 600 | € 700 | € 800 |

- BASQUE COUNTRY
- MADRID
- NAVARRE
- CATALONIA
- SPAIN
- CASTILE AND LEÓN
- ARAGON
- VALENCIA
- GALICIA
- MURCIA
- CANTABRIA
- LA RIOJA
- ASTURIAS
- ANDALUSIA
- CASTILE-LA MANCHA
- EXTREMADURA
- BALEARIC ISLANDS
- CANARY ISLANDS
- MELILLA
- CEUTA
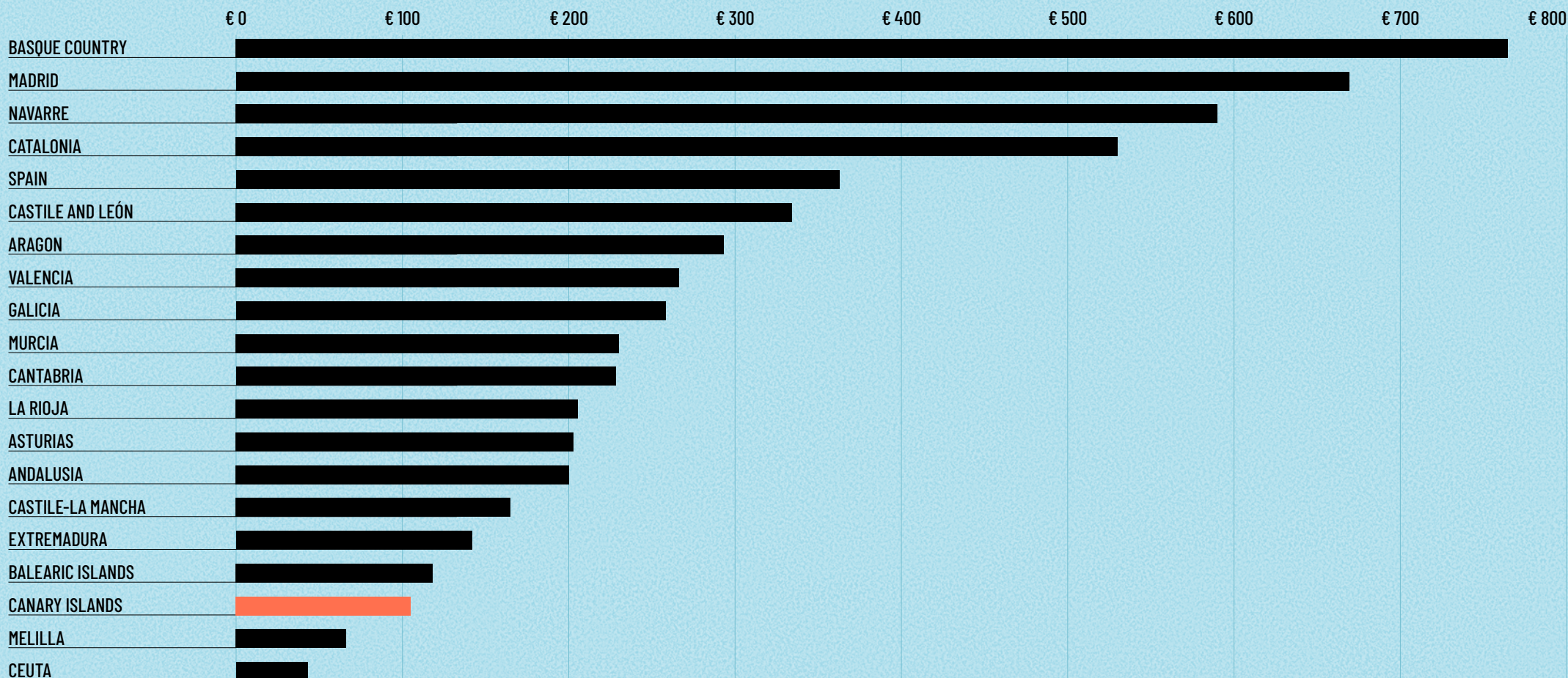
Source: Statistics on R&D activities (INE).

Spain invested 1.43% of its GDP in R&D in 2021. In the Canary Islands, this percentage is much lower, 0.56% (INE, 2022).

In terms of total internal expenditure on R&D activities by sector in 2021, in Spain, 56% of expenditure was made by companies, while in the Canary Islands this percentage is much lower, 22%. In the case of the Canary Islands, higher education (public) and public administrations concentrate the investment effort in R&D, which reflects the weakness of the private business sector in R&D investment.

Distribution of R&D expenditure in Spain, 2021
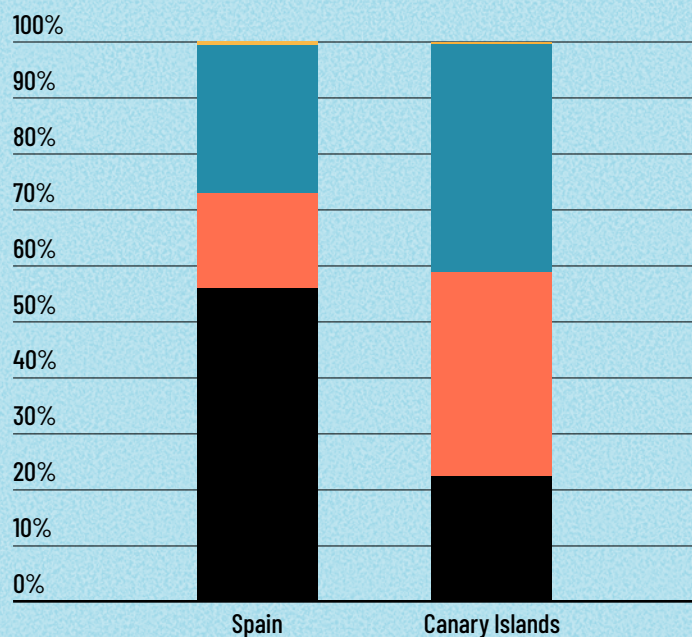
Source: Statistics on R&D activities (INE).
Notes: PNPI (Private nonprofit institutions)

■ Companies ■ Public Administration
■ PNPI ■ Higher education

Share of total domestic expenditure on R&D activities in GDP at market prices (base 2010)

Source: Statistics on R&D Activities (ISTAC)

Note: (p) Provisional data; (a) Advance data

■ Spain
■ Canary Islands

Employment and innovative enterprises

There are no indicators relating to innovation in tourism companies in the Canary Islands. In the period 2018–2020, the latest available data, 16.7% of Canary Islands companies were innovative, while in Spain this percentage was 22.6% (INE, 2021).

This places the Canary Islands at the bottom of this ranking of autonomous regions. In the Canary Islands, in 2021, personnel employed in R&D activities amounted to 4,009 employees in full-time equivalence, with a predominance of men, representing 1.6% of the total for Spain.

Personnel employed in R&D in the Canary Islands on a full-time equivalent basis (including research fellows).

■ Men
■ Women
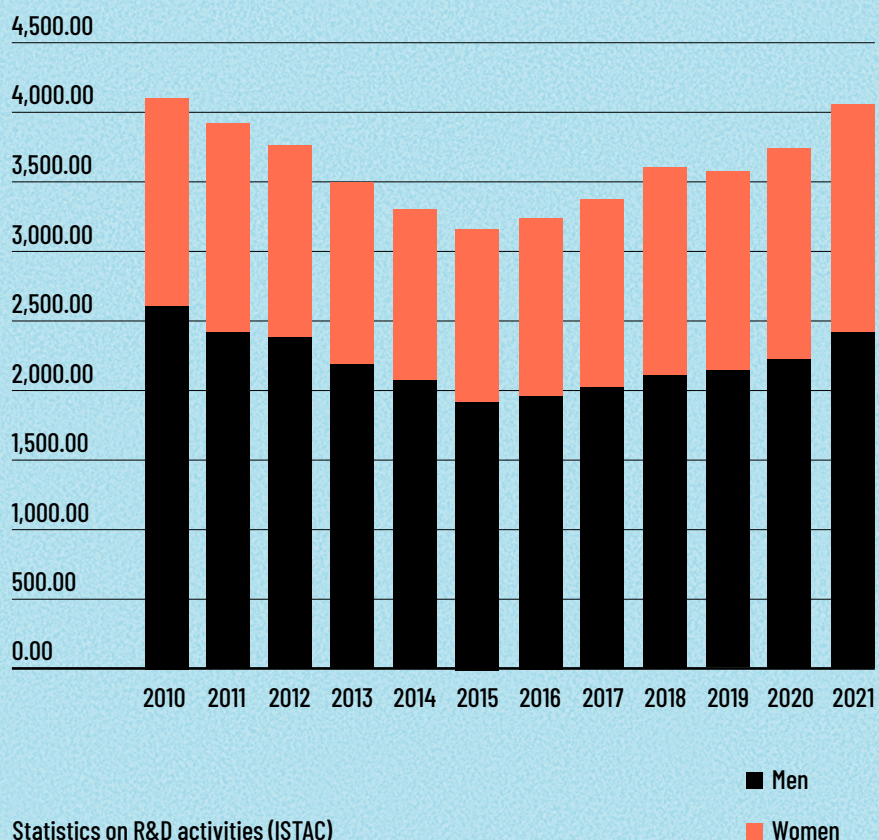
Statistics on R&D activities (ISTAC)

Percentage of innovative companies, 2018–2020
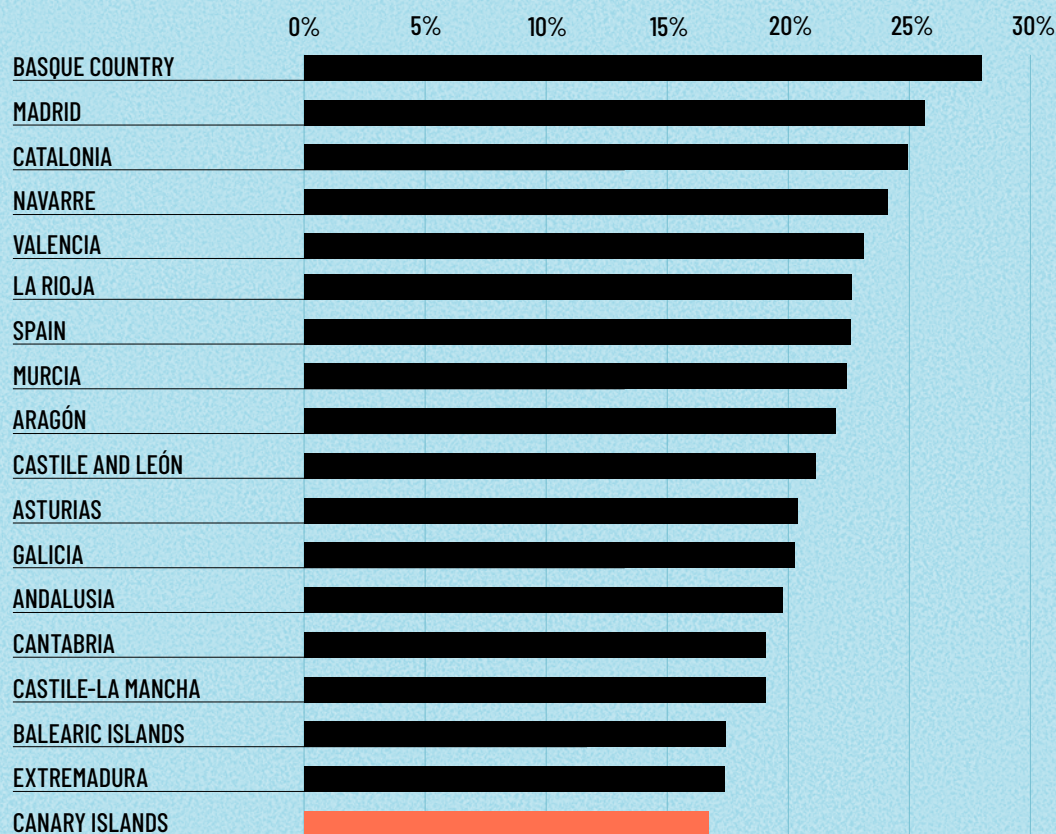
Source: Innovation in Enterprises Survey (INE)

Checklist of main indicators of issue area 4: Destination innovation, economic impacts and benefits

Indicator	Description	Availability	Source	Remarks
Conditions of employment	These indicators measure wages, working conditions and the contribution of tourism employment to the well-being of the local population.	Partially available	Annual Wage Structure Survey (INE) Employed by economic sector (INE and ISTAC)	Data on working conditions are needed
Local value added related to tourism expenditure. Tourism GDP	Value added generated as a result of tourism expenditure	Partially available	Contribution of Tourism to GDP: IMPACTUR Canarias (Exceltur and Government of the Canary Islands) Tourist Expenditure Survey (ISTAC)	There should be an official measurement of this indicator.
Distribution of the economic impact of tourism on the local economy in the form of employment and income (added value) among the different economic activities, economic agents and territories. Leakage abroad via repatriation of profits and others.	This indicator assesses the region's success in translating tourism expenditure into local value added for different economic activities (primary, secondary and tertiary) and economic agents (wages, gross operating surplus and taxes).	Not available		Data are needed on the distribution of local value added for different economic activities and economic agents.
Research, development and investment in innovation and results of companies related to tourism. Personnel employed in R&D in the Canary Islands in full-time equivalence (including research scholarship holders). Percentage of total domestic expenditure on R&D activities with respect to GDP.	Indicators on the number of initiatives, value and current or expected results	Partially available	Statistics on R&D activities (INE) Survey on Innovation in Enterprises (INE, 2021)	Specific data on tourism is needed

Labour skills, entrepreneurship and employment

The Canary Islands are among the European regions with the highest unemployment rate. In 2022 the unemployment rate in the European Union is 6.2%; in the Canary Islands it is 17.6%, while in Spain it is close to 13% (Eurostat). However, a comparison with the year 2021 shows that the Canary Islands is one of the European regions with the greatest decrease in this rate (−5.6 percentage points).

Of the European regions with the highest number of tourist overnight stays per inhabitant, the Canary Islands is the one that registers the greatest distance in percentage terms (6.4 percentage points) with respect to the national unemployment rate, if we take 2019 data as a reference. This data shows that the problems of unemployment in the Canary Islands are not due to specialisation in tourism, but to structural characteristics of the Canarian labour market, some of which are sha−red with Spain.

Unemployment rate by NUTS 2 regions (2022)

- ≥ 1.2 to 3
- ≥ 3 to 5
- ≥ 5 to 10
- ≥ 10 to 15
- ≥ 15 to 28.4
- Data not available

CANARIAS (ES)

GUADALUPE (FR)

MARTINIQUE (FR)

GUYANE (FR)

REUNIÓN (FR)

MAYOTTE (FR)

AÇORES (PT)

MADEIRA (PT)
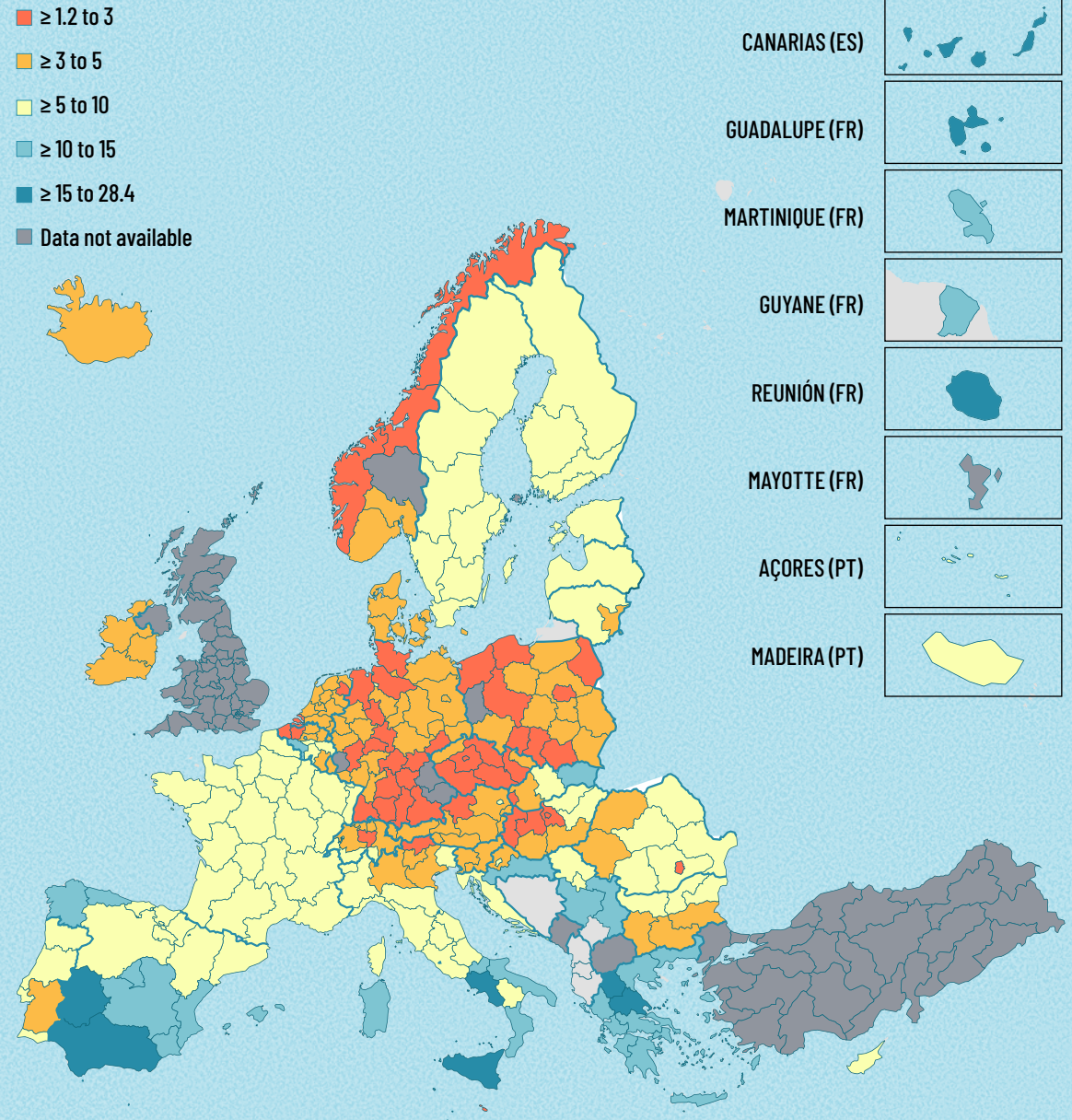
Source: Eurostat

Regional unemployment rates compared to the national unemployment rate for NUTS 2 regions (between 800,000 and 3 million inhabitants) with the highest number of tourist overnight stays per inhabitant, 2019.

DIFFERENCE IN PERCENTAGE POINTS BETWEEN NATIONAL AND REGIONAL UNEMPLOYMENT RATE
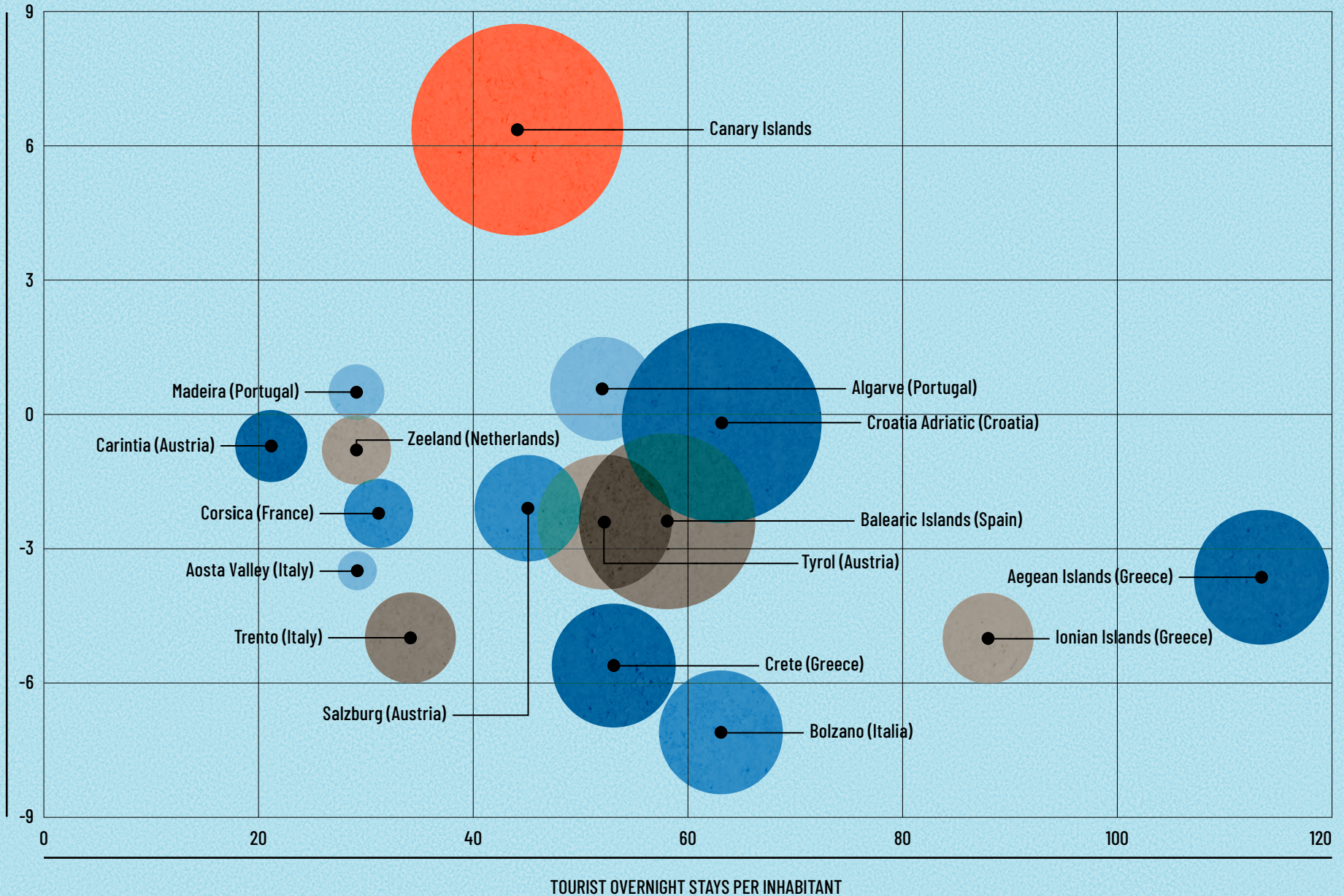
Note: The table lists all NUTS level 2 regions offering more than 20 tourism overnights/inhabitant. Analysis does not apply to Estonia, Cyprus, Latvia, Luxembourg, Malta and Slovenia (regions outside NUTS level 2).(*) Overnight stays in tourist accommodation by non-residents and residents. The area of the bubble is proportional to the number of overnight stays.

Source: Eurostat.Statistics explained

TOURIST OVERNIGHT STAYS PER INHABITANT

Unemployment and employment figures

The activity rate in Spain and in the Canary Islands does not present major differences, if we observe the latest data published by the INE/ISTAC in the 2nd quarter of 2023; in Spain it is 59.0% (Activity rate for women: 54.3%; Activity rate for men: 63.9%). In the Canary Islands, in the same period, it is 59.4% (Female activity rate: 54.1%; Male activity rate: 64.9%).

Unemployment rates in the Canary Islands continue to be higher than in Spain, although there is a notable decrease in the archipelago from 2021 onwards. In the Canary Islands, the unemployment rate in the second quarter of 2023 is 15.3% (female unemployment rate: 17.8%; male unemployment rate 13.0%) (Q2 EPA, ISTAC). In Spain the unemployment rate is 11.6% (female unemployment rate: 13.2%; male unemployment rate: 10.2%) (Q2 EPA, INE).

The employed population in the Canary Islands in the second quarter of 2023 amounted to 999,060 persons, of which women represent 45% of the total. The employed population in the service sector in the Canary Islands reached 861,800 persons in that quarter, i.e. 86.3% of the total employed population in the islands (Q2 2023, ISTAC). The increase in employment has led to a fall in the unemployment rate to around 15%, which is still very high, but far from the levels of around 25% during the pandemic or 21% before the pandemic. The gap with the Spanish average appears to be narrowing.

Evolution of the unemployment rate (%) in the Canary Islands and Spain
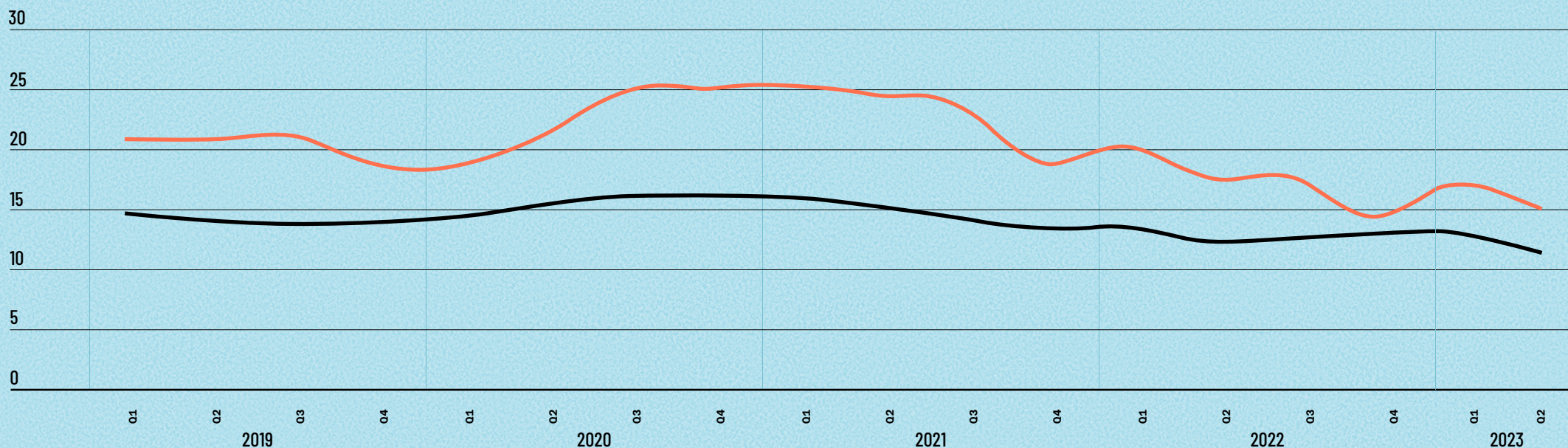
Source: Economically Active Population Survey (INE)

■ Spain   ■ Canary Islands

Social Security Affiliation

Over the last decade, the percentage of Social Security affiliations in the tourism industry activities with respect to the total number of affiliations has been around 21–25% (ISTAC). The monthly average of total Social Security affiliations in the Canary Islands during the year 2023 was 884,317, of which 212,782 were registered in the tourism industry, that is, 24% of the total. These annual averages have been calculated on the basis of monthly data that do not undergo significant seasonal variations.

Social Security affiliations in accommodation and catering (food and beverage) services account for 74% of those registered in the tourism industry, with 36% and 38% respectively. The remaining 26% corresponds to the rest of services in the tourism industry (transport, travel agencies, etc.). In terms of participation by gender, men represent 55% and women 45%.

Number of Social Security affiliates in tourism activities

Social Security affiliates in the tourism industry, by genderin 2023

55% Men

45% Women
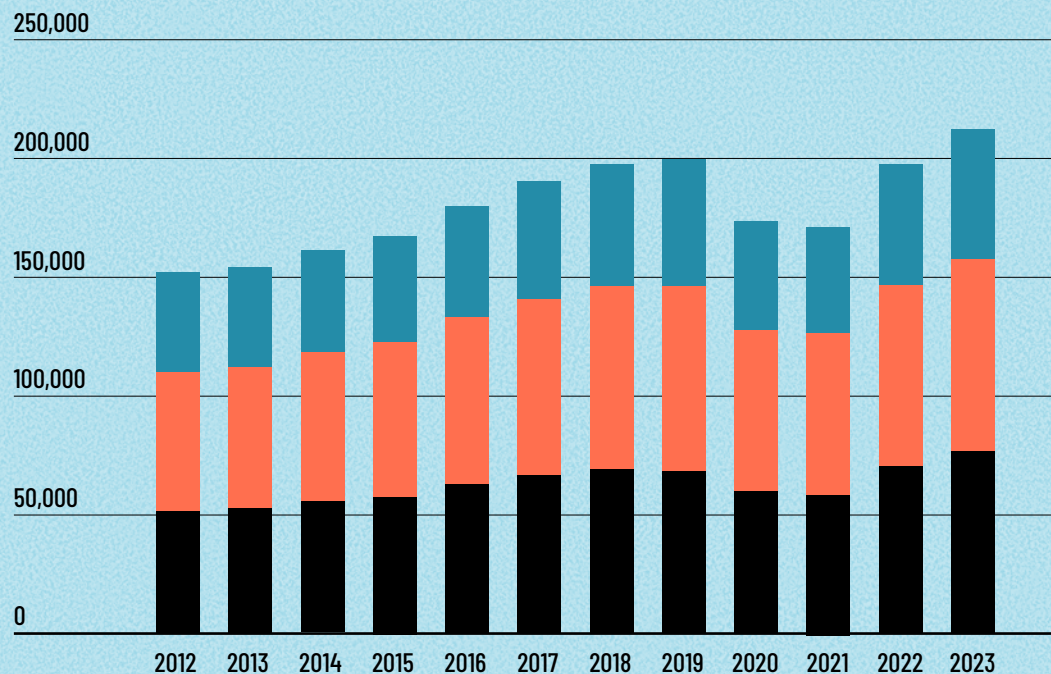
Source: Social Security Enrolment Statistics (ISTAC).

- ■ Accommodation services
- ■ Food and beverage services
- ■ Rest of the tourism industry
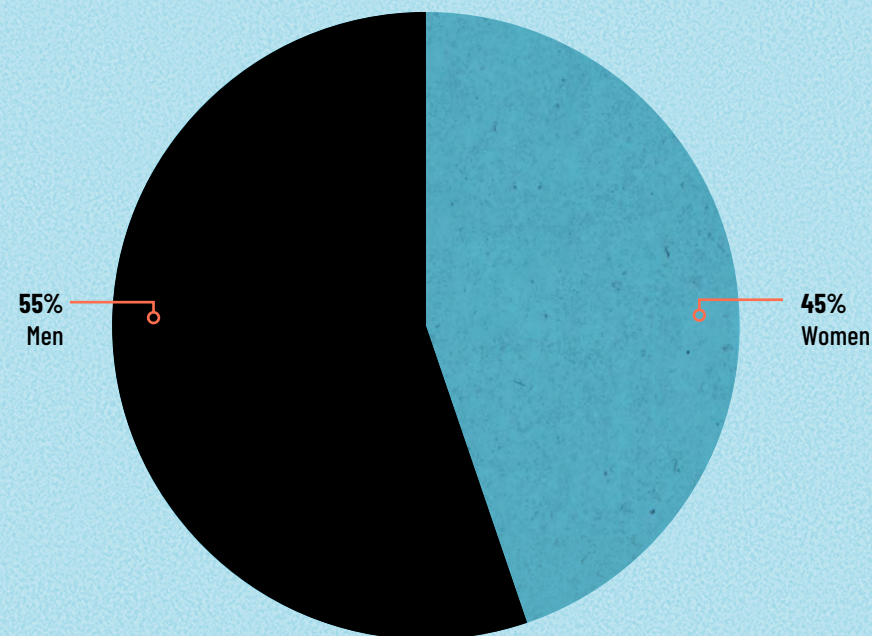
Source: Social Security Enrolment Statistics (ISTAC).

Average earnings in the services sector

In the services sector, the average annual income per worker is 22,564.94€ in 2021 in the Canary Islands, while in Spain it amounts to €25,448.75 (INE, 2021). The average annual earnings of women in this sector in the Canary Islands is €21,221.18 and of men €23,993.95.

Average annual earnings per employee in services sector (2021)

Source: Annual Wage Structure Survey (INE)

■ Women ■ Men

Companies in the tourism sector

The latest available data on companies registered with the social security in activities characteristic of tourism are from July 2023, in which 15,376 companies are registered. Of these, 9.4% correspond to accommodation services and 60.2% to catering companies (ISTAC).

In January 2022, of the total of 151,846 companies registered in the Canary Islands, 57.8% have no employees and 38.2% have between 1 and 9 employees.(Statistical

exploitation of the Central Business Register, INE). In terms of companies providing accommodation services, of the total of 2,358 registered companies, 45.6% have no employees and 39.7% have between 1 and 9 employees. Regarding restaurants, out of the total of 13,885 registered companies, 26.4% have no employees and 69.4% have between 1 and 9 employees.

Companies registered with the Social Security in tourism activities
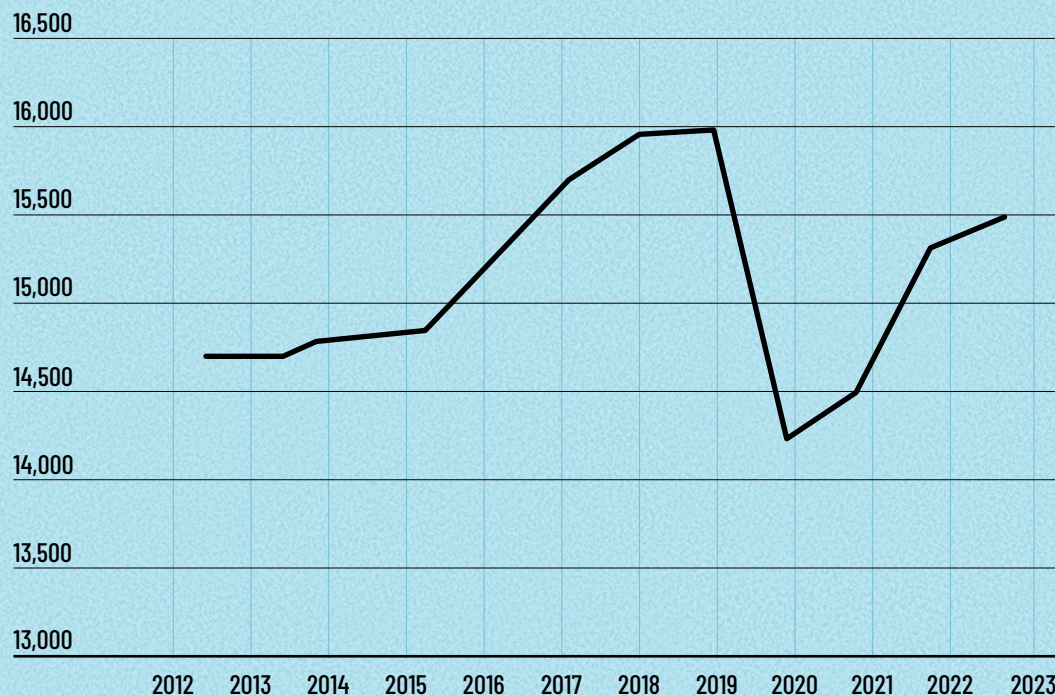
Note: Data for 2023 up to July 2023
Source: Statistics on Companies Registered with Social Security (ISTAC).

Accommodation and catering companies in the Canary Islands by number of employees (as of 1 January 2022)
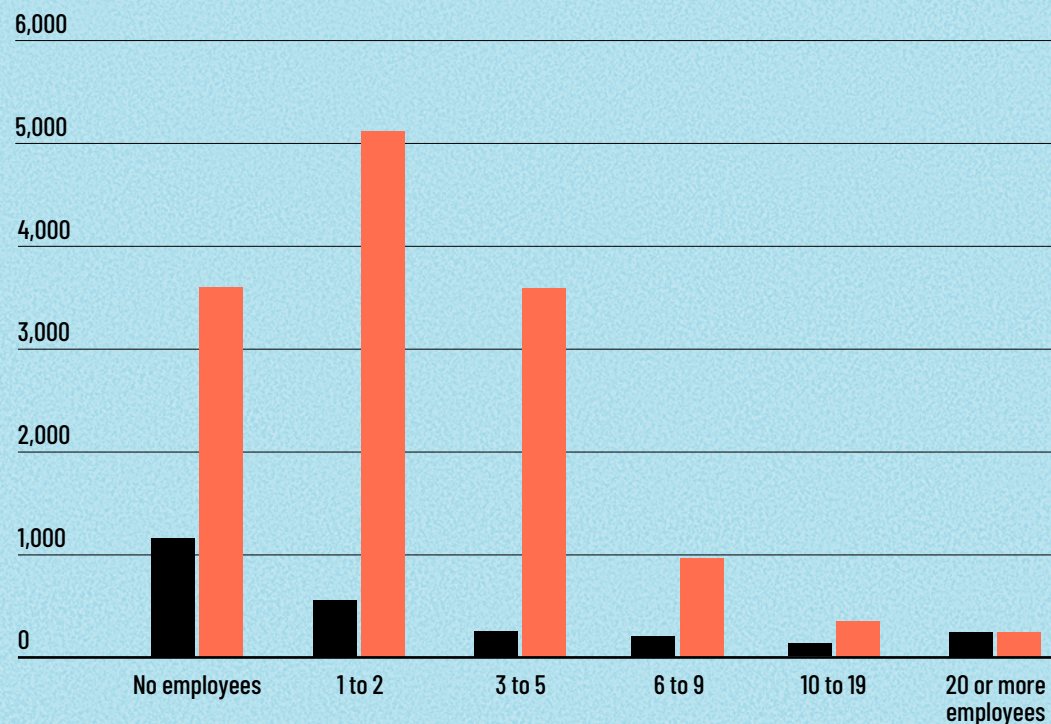
Source: Statistical exploitation of the central business directory. CCD (INE)

■ Accommodation services   ■ Food and beverage services

Workers with permanent contracts (permanent and permanent intermittent) and part-time workers

Percentage of affiliates with permanent and permanent intermittent contracts in activities characteristic of tourism, by gender.

Source: Social Security Affiliation Statistics (ISTAC).

● Women ■ Men
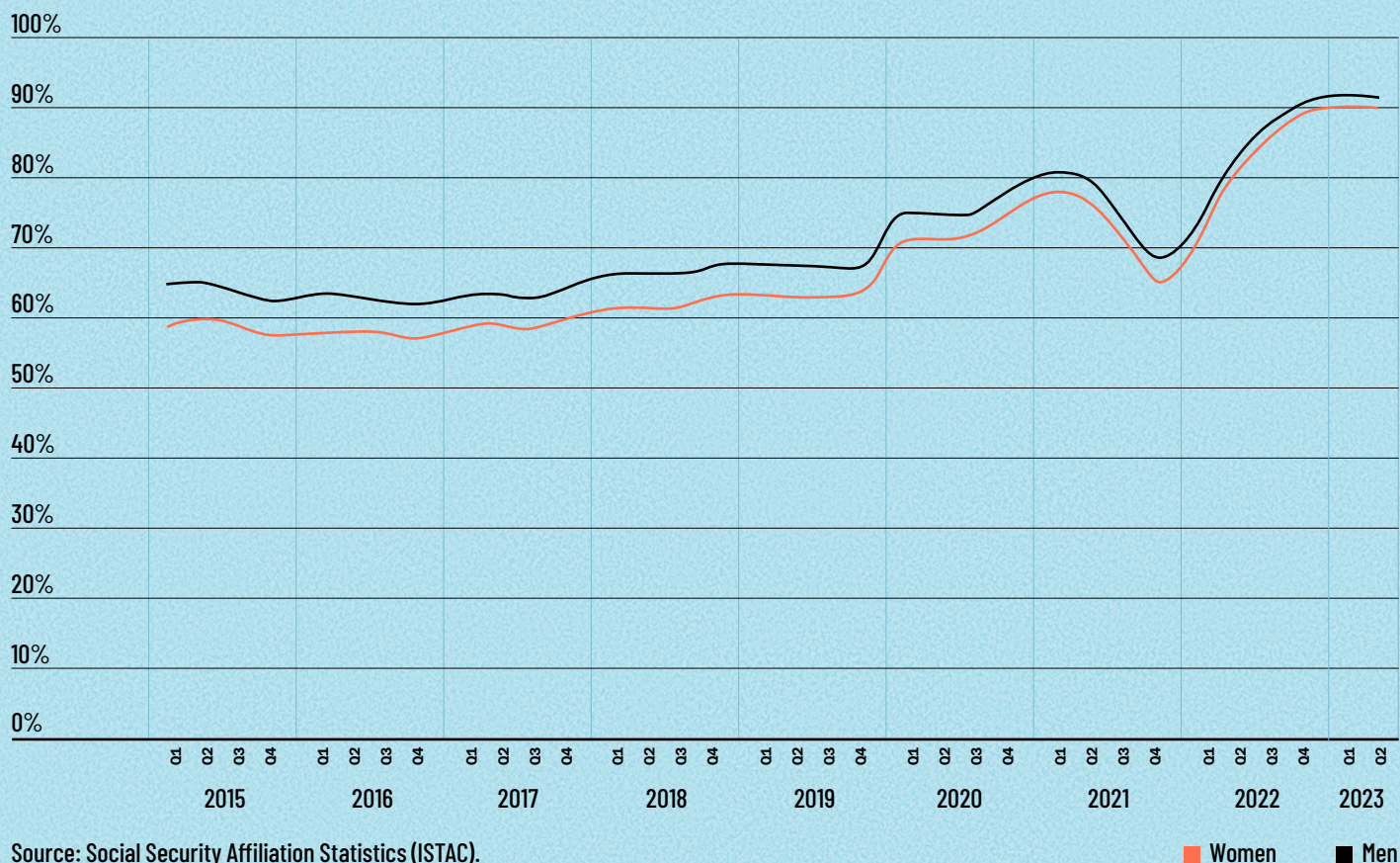
Taking into account the latest available data from September 2023, 90.2% of the total number of affiliations in activities characteristic of tourism are permanent and permanent intermittent contracts. This percentage is 76.7% for all economic activities in the Canary Islands.

By sex, in activities characteristic of tourism, men make up 53.8% of these affiliations, while women account for 46.2% of the total, according to the Social Security Affiliation Statistics (ISTAC).

Still using data from September 2023, 20.4% of the registrations in economic activities characteristic of tourism correspond to part-time jobs. This percentage is lower in the total of economic activities in the Canary Islands, at 18.6%. Women account for 52.5% of these part-time registrations in tourism activities.

Self-employed and salaried workers

Self-employed workers in hospitality and travel agencies/tour operators by Autonomous Region. August of each year.

Employees in hospitality and travel agencies/tour operators by Autonomous Region. August of each year.

ANDALUSIA
CATALONIA
VALENCIA
MADRID
GALICIA
CASTILE AND LEON
CANARY ISLANDS
BASQUE COUNTRY
BALEARIC ISLANDS
CASTILE-LA MANCHA
ARAGÓN
ASTURIAS
MURCIA
EXTREMADURA
CANTABRIA
NAVARRE
RIOJA
CEUTA AND MELILLA

ANDALUSIA
CATALONIA
MADRID
VALENCIA
BALEARIC ISLANDS
CANARY ISLANDS
GALICIA
CASTILE AND LEON
BASQUE COUNTRY
CASTILE - LA MANCHA
MURCIA
ARAGON
ASTURIAS
CANTABRIA
EXTREMADURA
NAVARRE
RIOJA
CEUTA ND MELILLA

Source: Dataestur, based on data from the Social Security General Treasury and the Social Marine Institute (Ministry of Labour, Migration and Social Security).

■ 2019
■ 2023

Source: Dataestur, based on data from the Social Security General Treasury and the Social Marine Institute (Ministry of Labour, Migration and Social Security).

■ 2019
■ 2023

Employment and qualifications in tourism

The results show that the percentage of workers belonging to the highest qualification group is lower in tourism than in economic activities as a whole. In tourism, 1.44% of the affiliated workers are included in the highest qualification group, while in all economic activities as a whole this figure is 7.61%.

Considering Social Security affiliates within the group of highly qualified workers in the tourism sector, the percentage of men (66%) significantly exceeds that of women (34%).

Share of Social Security affiliates in the highest qualification group (September, 2023)

Share by Gender of Social Security affiliates in the highest qualification group in the tourism industry (September, 2023)
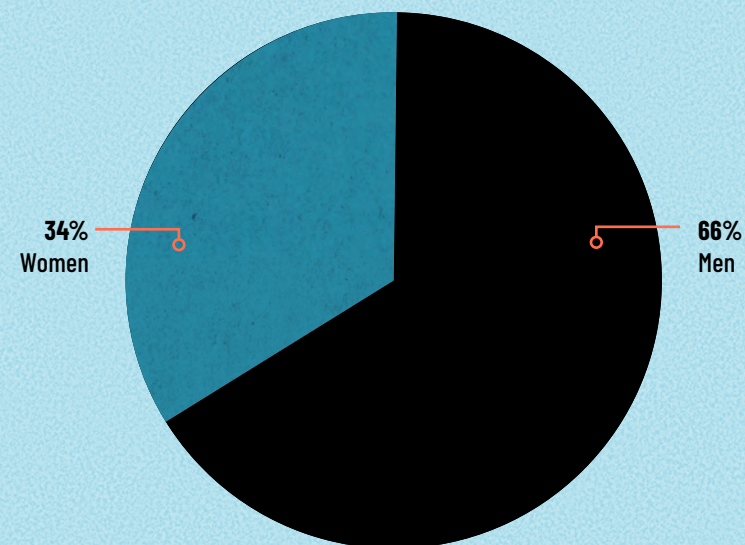
TOURISM

TOTAL CANARY ISLANDS

34% Women

66% Men

Source: Social Security Affiliation Statistics (ISTAC)

Note: Persons belonging to the highest qualification group are engineers and graduates. Senior management personnel.

■ Social security affiliates

■ Social security affiliates in the highest qualification group

Source: Social Security Affiliation Statistics (ISTAC)

Note: Persons belonging to the highest qualification group are engineers and graduates. Senior management personnel.

University education in tourism

In terms of university education in the Canary Islands, the Degree in Tourism is taught in public universities (University of La Laguna –ULL and University of Las Palmas de Gran Canaria –ULPGC) as well as in a private university (European University of the Canary Islands). It should be noted that the ULL has two tourism schools attached to it, which are the "Tenerife School of Tourism" and the "Iriarte School of Tourism", and the ULPGC has the "Lanzarote University School of Tourism".

In 2021, 96% of Tourism Graduates completed their studies at public universities. 55% at the ULL (167/303) and 41% (125/303) at the ULPGC.

Students who completed their studies for a Degree in Tourism at public and private universities in the Canary Islands.
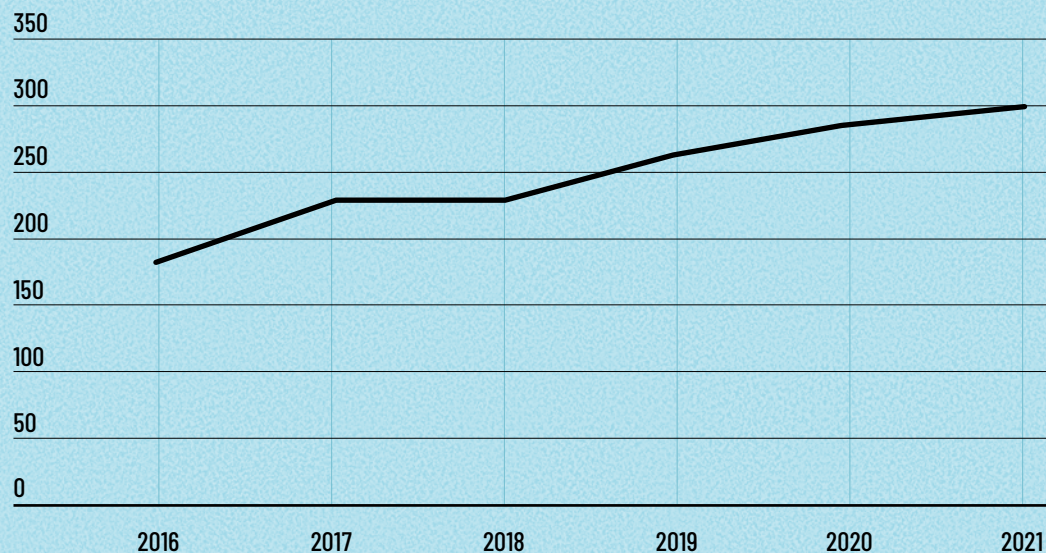
Source: University Education Statistics (ISTAC)

In terms of Master and doctoral studies in tourism, the public universities have the following academic offer:

- University Master's Degree in Tourism Management and Planning (ULL).
- University Master's Degree in Tourism, Transport and Environmental Economics (ULPGC).
- Inter-University Doctorate Programme in Tourism (ULL)
- Doctorate Programme in Tourism, Economics and Management (ULPGC)

The rate of labour market insertion in the Canary Islands of graduates in Tourism in public universities 2 years after graduation is 52.9% for graduates in 2019. In the case of graduates in 2016, there is a job placement rate of 60.2% 5 years after graduation, according to ISTAC data provided by the Labour Insertion Statistics.

Rate of labour market insertion in the Canary Islands of graduates from public universities.

	2 years after graduation (2019)			5 years after graduation (2016)		
	Total	M	W	Total	M	W
Graduate in Tourism	52.9%	43.5%	56.1%	60.2%	58.0%	61.2%
Total graduates	53.0%	49.9%	55.0%	65.8%	62.7%	67.7%

Source: Labour Market Insertion Statistics (ISTAC)

Professional training

In terms of Professional Training, in the Canary Islands, the following training programs are offered in the Hotel and Tourism Family:

- Travel Agencies and Event Management
- Cooking and Gastronomy
- Kitchen Management
- Restaurant Services Management
- Tourist Accommodation Management
- Tourist Guide, Information and Assistance
- Catering Services

In the academic year 2022/23, this professional family had 2,583 students registered; 6% of the Professional Training In the Canary Islands (Public, Subsidised and Private Education). According to the Regional Ministry of Education, Professional Training, Physical Activity and Sports of the Government of the Canary Islands, 58.2% are men and 41.8% are women.

Evolution of students in training programs in Hospitality and Tourism at public, semi-private and private centers in the Canary Islands
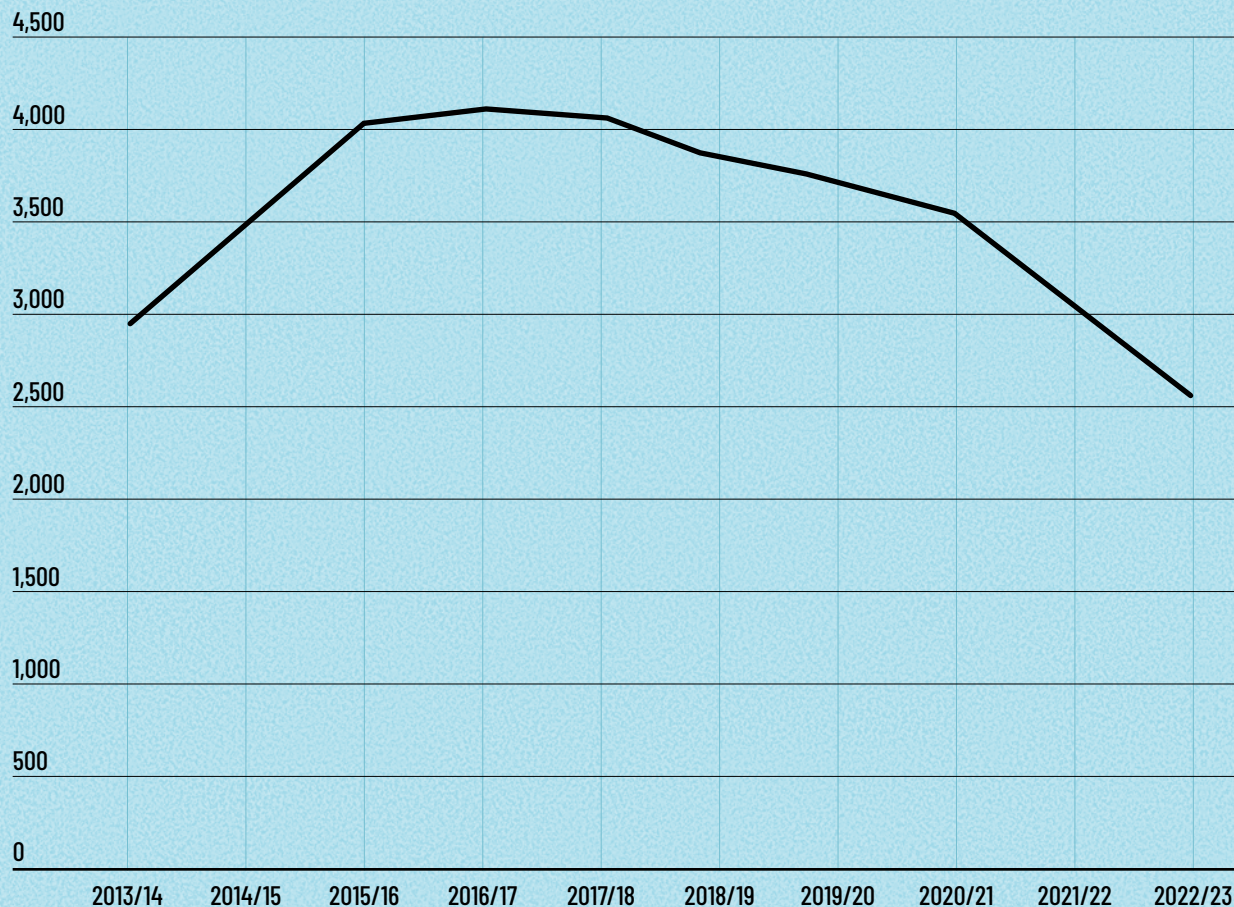
Source: Consejería de Educación, Formación Profesional, Actividad Física y Deportes del Gobierno de Canarias (2023)

Graduates of higher level training courses in the branch of hospitality and tourism have an affiliation rate (80.6%) and unemployment rate (19.4%) close to that of all higher level training courses in the Canary Islands, taking into account data from 2017 corresponding to the 2015 graduation year (ISTAC).

On the other hand, the rate of affiliation of intermediate level training courses in Hospitality and Tourism is lower than that of all the intermediate level training courses in the Canary Islands (72.0%) and the unemployment rate is higher (27.9%), according to data from 2017, taking the 2015 graduation year as a reference (ISTAC).

Affiliation and unemployment rates according to higher level training programs in public centres. Graduation year and periods. Year 2015/2017 2nd Q

	Affiliation rate			Unemployment rate		
	Total	M	W	Total	M	W
Hospitality and Tourism H.L.	80.6%	87.3%	75.8%	19.4%	12.7%	24.2%
Total cycles H.L.	81.3%	84.2%	78.5%	18.7%	15.8%	21.5%

Source: Labour Market Insertion Statistics (ISTAC)

Affiliation and unemployment rates according to medium level training programs in public centres. Graduation year and periods. Year 2015/2017 2nd Q

	Affiliation rate			Unemployment rate		
	Total	M	W	Total	M	W
Hospitality and Tourism H.L.	72.0%	76.0%	65.6%	27.9%	24.0%	34.4%
Total cycles H.L.	75.6%	79.5%	71.3%	24.3%	20.5%	28.7%

Source: Labour Market Insertion Statistics (ISTAC)

Language proficiency (English)

The Canary Islands is one of the autonomous regions with a better position in terms of English proficiency, although it is clear that language learning must continue to be promoted among the population.

People who report speaking English well by region (2021)

Region	Value
MADRID	
BALEARIC ISLANDS	
CANARY ISLANDS	
CATALONIA	
NAVARRE	
CANTABRIA	
ASTURIAS	
ANDALUSIA	
ARAGON	
MURCIA	
RIOJA	
BASQUE COUNTRY	
VALENCIA	
CASTILE AND LEON	
CASTILE-LA MANCHA	
GALICIA	
EXTREMADURA	
CEUTA	
MELILLA	
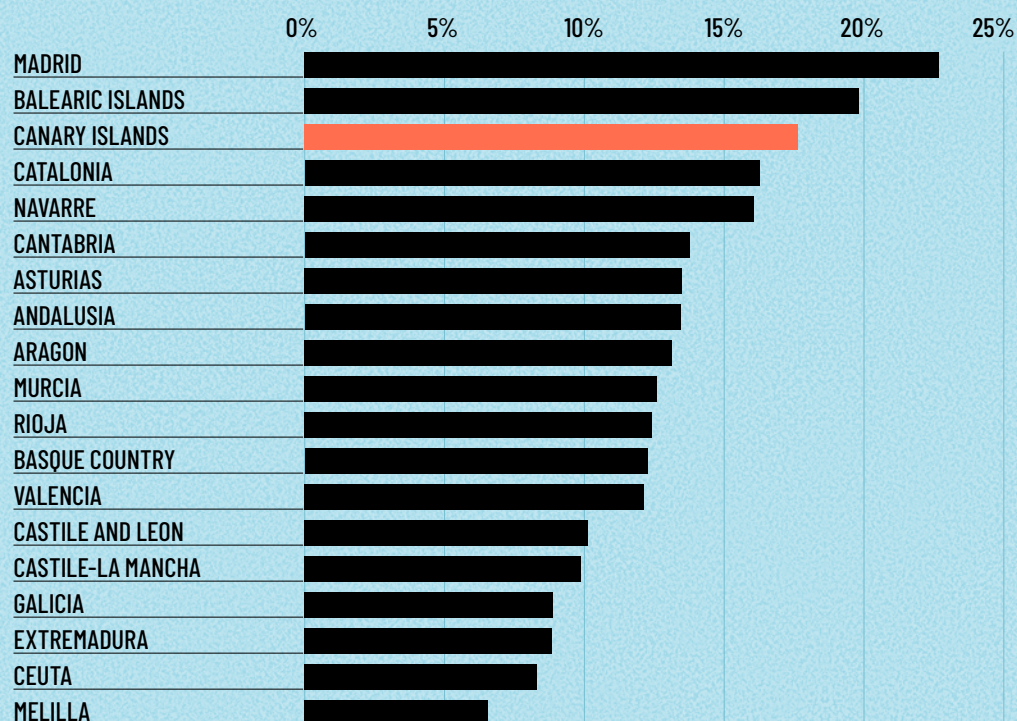
Note: There are 4 different aspects ("Speaks", "Understands", "Reads", "Writes"), for which there are 3 possible answers ("Not at all", "With difficulty", "Well"). For this graph, the aspect "Speaks" has been selected. The figure is related to the % of people who have selected the answer "Well".

Source: Survey on Essential Characteristics of Population and Housing. Year 2021. (INE)

Percentage of Canary Islands residents reporting that they read, understand, write and speak English well (2021)

Aspect	Value
READING	20.42%
ORAL UNDERSTANDING	19.98%
WRITING	17.96%
SPEAKING	17.63%

Note: Of the 4 aspects indicated (Reads, Understands, Writes and Speaks), the "Total" of the option "Well" has been selected, since there are three possible answers ("Not at all", "With difficulty", "Well").

Source: Survey on Essential Characteristics of Population and Housing. Year 2021 (INE)

Access to housing for workers

Access to accommodation for employees in tourist areas is becoming a significant problem in the Canary Islands. A comparison with other regions shows that the average price per square metre of rented housing in the Canary Islands is among the highest among the autonomous regions with the lowest disposable income and salaries. In all the regions there is an increase in 2021 compared to previous years. Between 2015 and 2021, the Canary Islands was the fourth Autonomous Region with the highest growth in property rental prices, with 13%, behind the Balearic Islands, Valencia and Catalonia.

Variation 2015-2021 in Rental Housing Prices (IPVA) by Autonomous Region
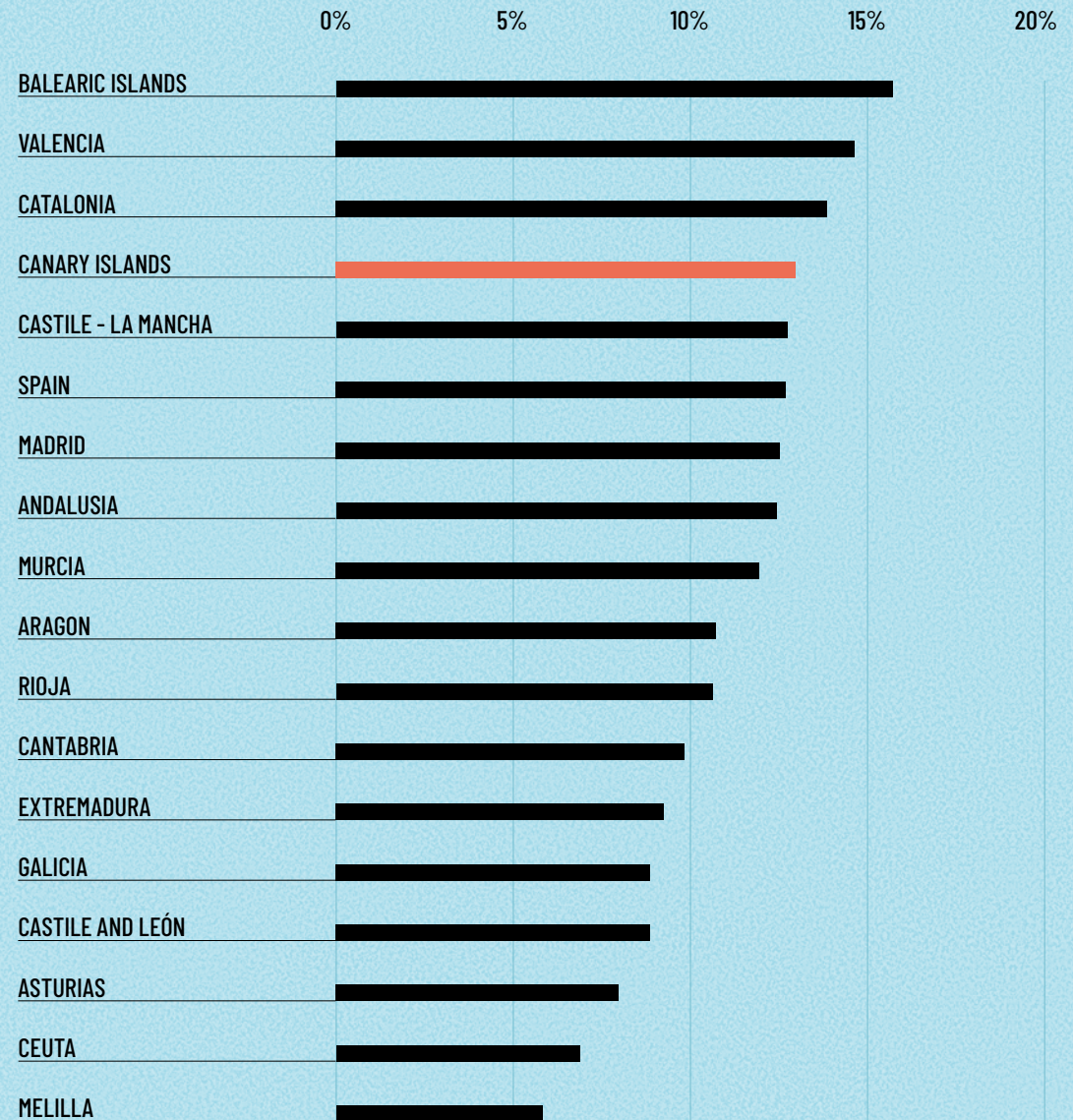
Source: Rental Housing Price Index (RHPI). INE

■ 2019   ■ 2020   ■ 2021

The evolution of housing rental prices in the Canary Islands has been increasing in recent years. According to the rental housing price index published by the INE based on tax data, between 2015 and 2021 prices increased by a cumulative 13%. This variation is similar to the average for Spain. It is interesting to note that the rental prices for apartments has risen more than that for single–family homes, and that smaller homes have seen a greater increase in rental prices than larger ones. By municipalitiy, this survey also offers very relevant results. The municipalities of La Oliva, Granadilla and Puerto del Rosario are the ones that have seen the most intense increases in house prices in the mentioned period. These are municipalities where short–term vacation rentals have had a significant increase.

Variation of the price of long-term housing rentals. 2021 respect to 2015 (accumulated). Top 25 municipalities in the Canary Islands

Municipality	
LA OLIVA	
GRANADILLA DE ABONA	
PUERTO DEL ROSARIO	
GÜIMAR	
SANTA MARÍA DE GUÍA (GC)	
ARRECIFE	
CANDELARIA	
SAN MIGUEL DE ABONA	
ICOD DE LOS VINOS	
GUÍA DE ISORA	
ARONA	
ANTIGUA	
GÁLDAR	
EL ROSARIO	
LA LAGUNA	
SANTA CRUZ DE TENERIFE	
SANTA CRUZ DE LA PALMA	
YAIZA	
TUINEJE	
TEROR	
TELDE	
SANTA LUCÍA DE TIRAJANA	
TACORONTE	
TÍAS	
SAN BARTOLOMÉ	

Note: the data correspond to municipalities in the Canary Islands with more than 10,000 inhabitants.
Source: Rental Housing Price Index - IPVA (INE), based on tax data.

Checklist of main indicators of issue area 5:
Labour skills, entrepreneurship and employment

Indicator	Description	Availability	Source	Remarks
Employment in tourism	Employment in tourism, distribution by gender, age, inclusion of people with disabilities. Employment should be measured from a supply-side approach and through a demand-side approach.	Partially available	Affiliation to Social Security in Tourism Characteristic Activities (ISTAC) Tourism Accommodation Survey. Employment statistics for hotels and apartments (ISTAC)	Age distribution and the inclusion of people with disabilities are needed. Data on the supply side approach are needed.
English language proficiency	People who speak English well by Autonomous Region as a percentage of the total. General level of English in the Canary Islands as a percentage of the total.	Available 2021	Survey on Essential Characteristics of Population and Housing. Year 2021. (INE)	
Over- and under-qualification in tourism.	It analyses the over-qualification and under-qualification of professionals and jobs in the tourism sector, enabling initiatives to be taken to improve policies and undertake improvement actions.	Occasional data	Informe iTalento (Report on e-Talent) (Impulsa Foundation)	Estimate based on occasional research and national reports.
Graduates in Tourism degree and vocational training cycles in Hospitality and Tourism and relation with economic activity/ Rate of labour market insertion.		Available	Labour insertion statistics (ISTAC)	
Companies created by women out of the total number of companies in the Hospitality and Tourism sector		Not available		
Availability of rented accommodation for workers in tourist areas (or similar) Rental Housing Price Index (RHPI). INE.		Partially available	Rental Housing Price Index (RHPI). Base 2015. (INE).	
Índice de creación y supervivencia de star-tups en turismo	It identifies the creation of new companies in the Canary Islands that provide services in tourism and their age as an indicator of survival.	Partially available	Enterprises registered in Social Security. Tourism Characteristic Activities. (ISTAC)	Data on the survival rate of new tourism enterprises is needed.

Digitalization, knowledge and smart tourism

The Canary Islands have seven smart destinations, which are part of the Smart Tourist Destinations Network. The island of Tenerife, Puerto de la Cruz, Las Palmas de Gran Canaria and Arona joined this network in 2019. The municipalities of Tías, Santa Cruz de Tenerife and Puerto del Rosario joined in 2020.

There is currently no institution promoting and coordinating the digitisation of the tourism sector in the Canary Islands, which can play a key role in improving the competitiveness and differentiation of the destination. It is of particular interest to explore ways of improving the sustainability of the destination through digitisation.

The Survey on the use of ICT and e-commerce in companies (INE) provides data on an annual basis by Autonomous Region. The latest data available, referring to the year 2021 and the first quarter of 2022, show that in the Canary Islands 83.3% of companies in the services sector with 10 or more employees have 3G or higher mobile broadband internet access, while in Spain this percentage is higher, at 89.9%.

The main ICT expenditure of companies in the Canary Islands in 2021 was on ICT services and consultancy, followed by expenditure on ICT goods.

ICT spending by companies in the Canary Islands in 2021
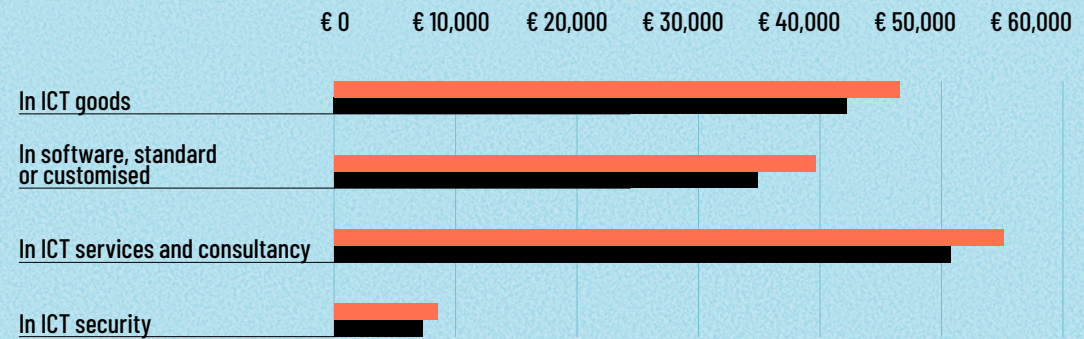
Source: Survey on the use of ICT and e-commerce in companies (INE).

Legend: ■ Total companies ■ Services

Comparison in digitisation Canary Islands–Spain

Regarding the use of ICT by companies in the services sector with 10 or more employees, the percentage of companies in this sector that analyse Big Data in the Canary Islands (12.3%) is notably lower than the national percentage (19%) during the first quarter of 2022 (INE). Similarly, a smaller percentage of companies in this sector use Artificial Intelligence technologies (11% in the Canary Islands and 15.3% in Spain) (Q1.2022, INE). 54.0% of companies in the services sector that use artificial intelligence apply technology that converts spoken language into machine-readable format. As for the use of robots, 3% of service sector companies in the Canary Islands apply this technology, a slightly lower percentage than the 4.3% of service companies in Spain that also use it (Q1.2022, INE).

In the Canary Islands, 67.3% of service companies with an Internet connection use social media, a percentage that rises to 71.7% in Spain as a whole (Q1.2022, INE).

ICT use in service sector companies with 10 or more employees (Percentage of companies). Q1 2022

- With any ICT security measures
- Staff have remote access
- With internet connection and website
- Use Social Media
- Enable Teleworking
- Analyse Big Data
- Use AI Technologies
- Use Robots

Legend: ■ Spain ■ Canary Islands

Source: Survey on the use of ICT and e-commerce in companies (INE).
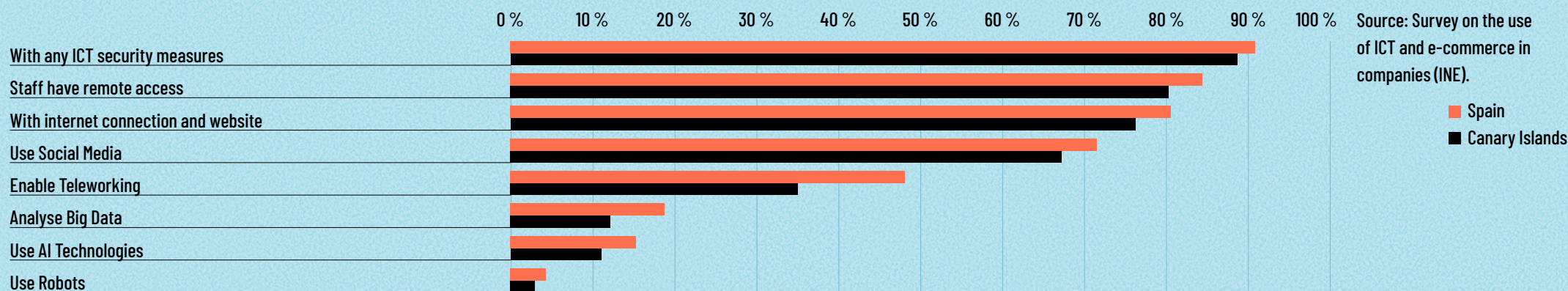
Percentage of service sector companies by Artificial Intelligence (AI) technologies used. Q1 2022

- Automates workflows or aids in decision making
- Identifies objects or people based on images
- Converts spoken language into machine-readable form
- Performs written language analysis
- Generates written or spoken language
- Enables physical movement of machines

Legend: ■ Spain ■ Canary Islands

Note: Percentage of total enterprises using artificial intelligence (AI) technologies

Source: Survey on the use of ICT and e-commerce in enterprises (INE).

ICT and environmental impact in the services sector

The percentage of companies in the services sector that carry out actions to reduce the environmental impact related to ICT in the Canary Islands is similar or higher than in Spain, according to data from the first quarter of 2022 (INE). In the Canary Islands, the percentage of service sector companies that apply measures to reduce the energy consumption of ICT equipment stands out: 51.0% (in Spain: 43.7%) as well as the percentage of service sector companies that keep ICT equipment for spare parts: 54.7% (in Spain: 50.1%) (INE, 2022).

Percentage of service sector companies that carry out actions to reduce their ICT-related environmental impact . QI 2022

Recycling ICT equipment in containers
Apply measures to reduce the use of paper
Consider environmental impact when selecting ICT equipment or services
Keep ICT equipment for spare parts
Apply measures to reduce energy consumption of ICT equipment
Companies selling, returning or donating unused ICT equipment

Source: Survey on the use of ICT and e-commerce in companies (INE).

■ Spain
■ Canary Islands

ICT specialists in the service sector in the Canary Islands

Having ICT specialists is a key element in the digitalisation process. In the Canary Islands, the percentage of service sector companies, with 10 or more employees, that employ ICT specialists is 17%, while in Spain this percentage is 22%. Of the total number of companies employing ICT specialists in the Canary Islands, only 34.6% have female ICT specialists, while in Spain as a whole this percentage rises to 42.6% (Q1 2022, INE). Furthermore, there are notable differences in the percentage of companies offering ICT training activities to their employees in the Canary Islands (17.8%) and in Spain (26.1%) (Q1 2022, INE).

Percentage of service sector companies with ICT specialists by expertise. IT2022

Source: Survey on the use of ICT and e-commerce in companies (INE).

■ Spain
■ Canary Islands
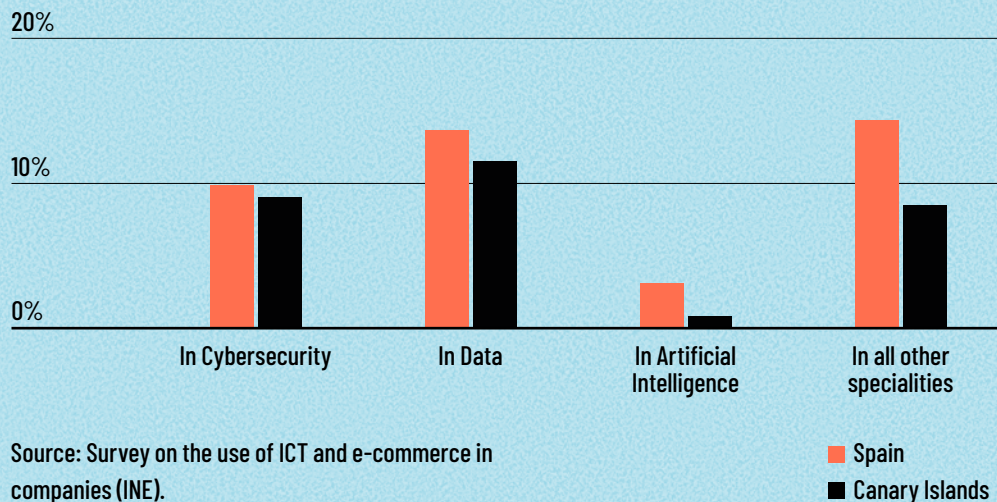
Percentage of people using the Internet (aged 16-74) in European regions (Canary Islands highlighted)

BOUGHT/ORDERED GOODS OR SERVICES

INTERNET BANKING

SOCIAL NETWORKS

Smart Tourist Destinations in the Canary Islands.

Source: Ministry of Industry, Trade and Tourism of the Government of Spain.

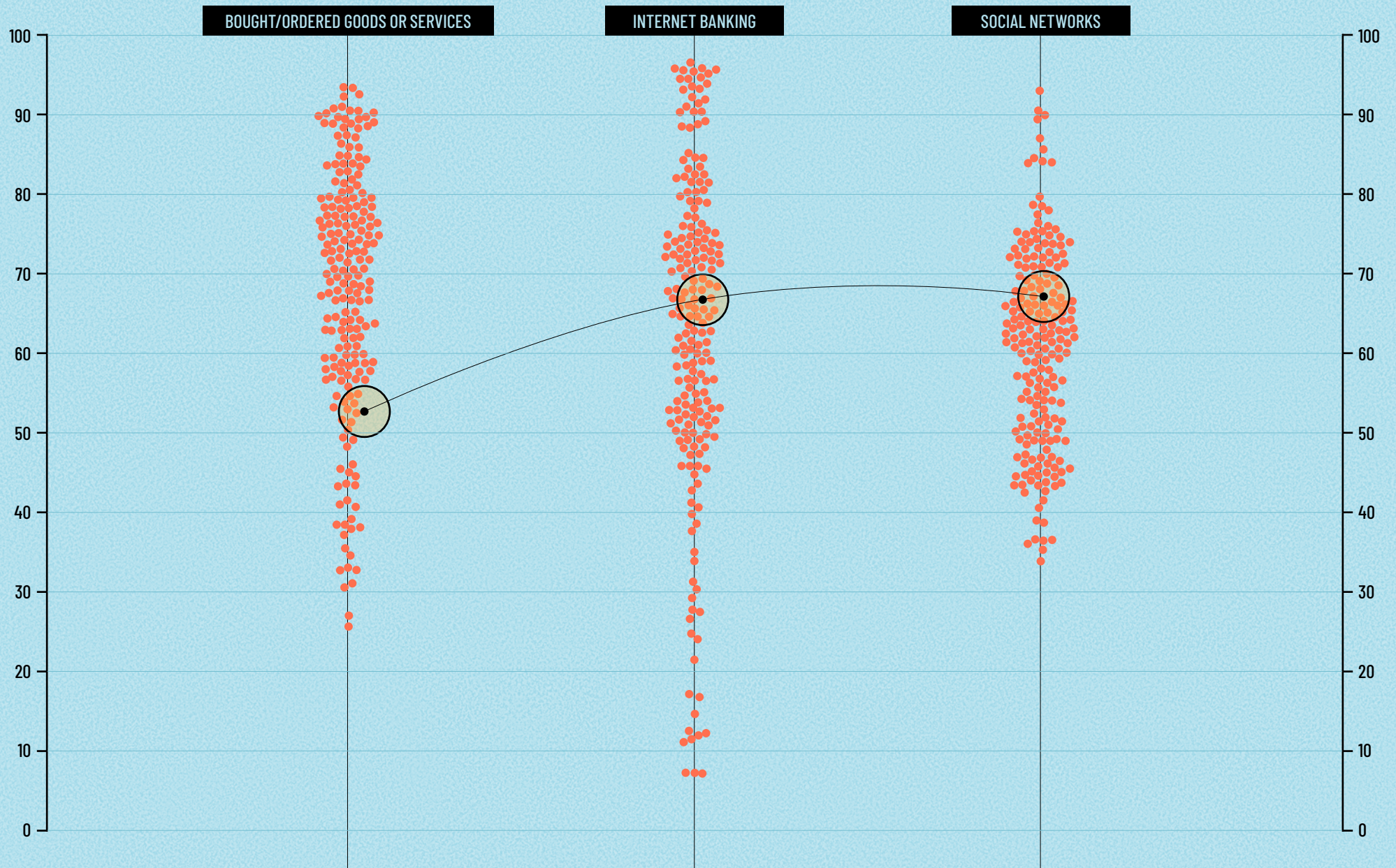| DTI	Featured Initiatives (All destinations are at Level 2)
Arona	• Arona, strategic brand in international markets; • Innovative destination capable of leading the transformation in DTI; • Sustainable municipality in planning and over time; • Arona, Accessible Destination.
Las Palmas de Gran Canaria	• Deployment of a fibre optic ring deployed in the city with its WiMax links. • Deployment of a free WiFi network with 42 access points distributed in twenty areas of tourist interest in the city. • Development of an open data portal. • Smart Commerce Project: Deployment of 300 beacons in shops and development of the Comercio Canarias application that interacts with them. • Deployment of the Tourist Intelligence System (SIT).
Tenerife	• Tourism Innovation Hub • Artificial Intelligence and Cybersecurity Tourism Master Plans • Economic Promotion Area, with the Why Tenerife? brand and its Tenerife Work&Play initiative. • Innovation Master Plan and Modernisation Plan Tourism Sustainability Board • The island is a pioneer in accessible tourism. In this regard, Tenerife Tourism is implementing policies to promote inclusive tourism.
Puerto de la Cruz	• Important involvement of the agents that make up the tourist experience in Puerto de La Cruz • Outstanding initiatives in sustainability such as LED street lighting or the 70/20 Recycling Plan • The implementation of a tourist intelligence system in collaboration with the University of La Laguna

DTI	Featured Initiatives (All destinations are at Level 2)
Santa Cruz de Tenerife	• Governance and planning through the Santa Cruz de Tenerife Strategic Tourism Plan 2023-2027 and the Tourism Board • Roll-out of intelligent tourist signage • "Degusta Santa Cruz" gastronomic product club. • Municipal network of tourist offices. • Carnival House, where visitors can enjoy the Carnival experience all year round. • SICTED with more than 50 strategic tourist resources distinguished in tourist quality. • Anaga, a natural space catalogued as a Biosphere Reserve.
Puerto del Rosario	• Gastronomic and craft markets for cruise passengers. • Traditional craft market Since 2014 SICTED certification of OIT • Puerto del Rosario Child Friendly City. • In creation of the Municipal Tourism Council. • Promotion as a destination for Sports Tourism (surfing, wind surfing, stand up paddle, kite surfing, MBT, cycling, nautical, running, diving, snorkelling, hiking, etc.) • Application of tourist information through augmented reality • 3 Beaches with blue flags.
Tías	• Tías is a destination with a firm commitment to tourism quality, promoting the Spanish Tourism Quality Integral System in Destinations (SICTED) and its notable efforts to recover and conserve its cultural heritage. • It is remarkable for its remarkable efforts for the recovery and conservation of its cultural heritage. • Citizen participation processes are promoted in the municipality. • It has several protected natural areas, highlighting the so-called "Parque Natural de Los Volcanes" (Natural Park of the Volcanoes).

Checklist of main indicators of issue area 6:
Digitalization, knowledge and smart tourism

Indicator	Description	Availability	Source	Remarks
Infrastructure and connectivity	Companies or Organisations that have Internet connection, with broadband and mobile 3G, 4G or higher.	Partially available	Survey on the use of ICTs and e-commerce in companies (INE)	Specific data on tourism enterprises/organisations are needed.
Presence and use of the Internet	Companies or Organisations that have a website, use social media, advertise on the internet and/or interact with the public administration through social media.	Partially available	Survey on the use of ICTs and e-commerce in companies (INE)	Specific data on tourism enterprises/organisations are needed.
Key technologies and digital talent	Companies or organisations using cloud services, big data analytics, security, artificial intelligence and/or robotics. It also identifies the employment of ICT specialists, and the specific training of their employees.	Partially available	Survey on the use of ICTs and e-commerce in companies (INE)	Specific data on tourism enterprises/organisations are needed.

Energy management

The Canary Islands is the only region in Spain that is not connected to continental energy grids. It has a poorly diversified, ageing and fragmented electricity generation park (Sustainable Strategy in the Canary Islands, 2022). In October 2023, the Government in the Canary Islands approved the declaration of an energy emergency as it considered that the electricity system in the Canary Islands was in a critical situation. The islands have recently suffered several energy blackouts. The last of these, in July 2023, affected the island of La Gomera.

The Canary Islands maintain a high dependence on fossil fuel-based energy from abroad. In the Canary Islands, there has been an increase in electricity demand (+5.9%): 8,543,265 MWh in 2022 (Spanish Electricity Grid). However, electricity demand in Spain decreased (-2.4%) compared to 2021 (Electricity System Report 2022, Spanish Electricity Grid).

Related initiatives:

- Spanish Recovery, Transformation and Resilience Plan (PRTR): Investment "C7.I2 Sustainable energy in the islands".
- Sustainable energy strategy in the Canary Islands.

- Canary Islands Energy Transition Plan (PTECan-2030)
- Energy strategies to support the PTECan:
  ◇ Canary Islands strategy for photovoltaic self-consumption on buildings.
  ◇ Canary Islands energy storage strategy.
  ◇ Canary Islands electric vehicle strategy.
  ◇ Canary Islands geothermal energy strategy.
  ◇ Canary Islands marine renewable energy strategy.
  ◇ Canary Islands strategy for manageable generation.
  ◇ Canary Islands green hydrogen strategy.
  ◇ Canary Islands strategy for demand management and smart grids.
- Declaration of climate emergency in the Canary Islands, with the objective of achieving decarbonisation in the Canary Islands by 2040.
- Adherence to the Glasgow Commitment, a commitment to reduce carbon emissions from tourism by 50% by 2030 and to achieve zero net carbon emissions by 2050.

Renewables in the Canary Islands

Contribution of renewables much lower than the Spanish average. In 2022, in the Canary Islands, 19.5% (Canary Islands Energy Observatory); in Spain, 42.2% (Renewable Energy Report, Red Eléctrica).

Evolution of electricity demand coverage in the Canary Islands (2012-2022)
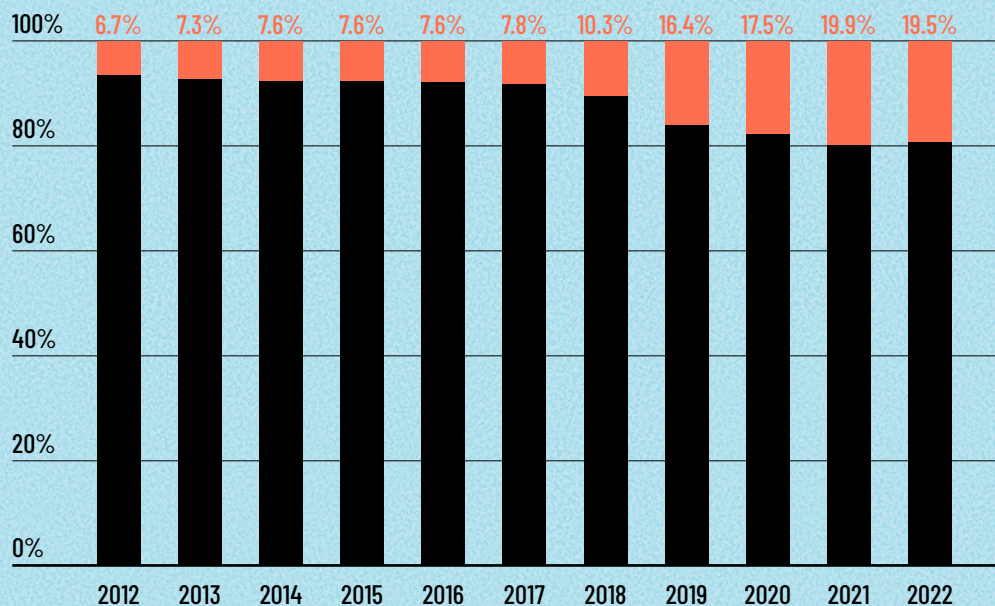
Source: Canary Islands Energy Observatory. Government of the Canary Islands

■ % Renewable
■ % Thermal

Electric vehicles in the Canary Islands

In 2022, the percentage of electric vehicles in the Canary Islands is 0.47% of the total (Vehicle fleet statistics, ISTAC).

Electric vehicles (passenger cars) in the Canary Islands (2015-2022)
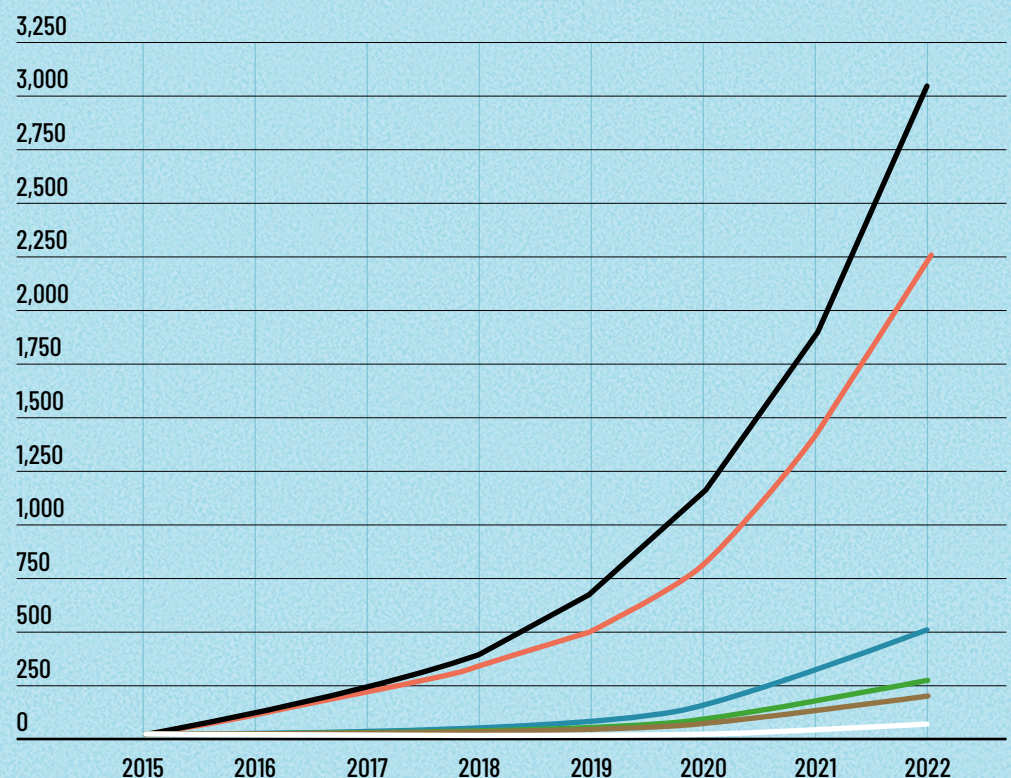
Source: Vehicle fleet statistics (ISTAC).

■ Gran Canaria   ■ Lanzarote   ■ La Palma
■ Tenerife   ■ Fuerteventura   ■ El Hierro

Final energy demand by economic sector

Proportion of final energy demand by economic sector: the services sector, which includes hotel and catering and tourism services, uses 12.9% in 2021 (Canary Islands Energy Yearbook, 2021).

The transport sector (land, air and sea) accounts for 71.3% of final energy demand in 2021 (Canary Islands Energy Yearbook, 2021).

The level of motorisation and the age of the vehicle fleet in the islands is one of the factors that explain the high final energy consumption of the transport sector (Canary Islands Electric Vehicle Strategy, 2020).

Percentage distribution of final energy demand in the Canary Islands by sector, 2021

3,0% Industry

10,2% Inland maritime transport

40,3% Land transport

12,9% Administration, commerce and services (private and public)

0,5% Not specified

10,8% Residential

1,6% Agriculture, livestock and fisheries

20,8% Air transport
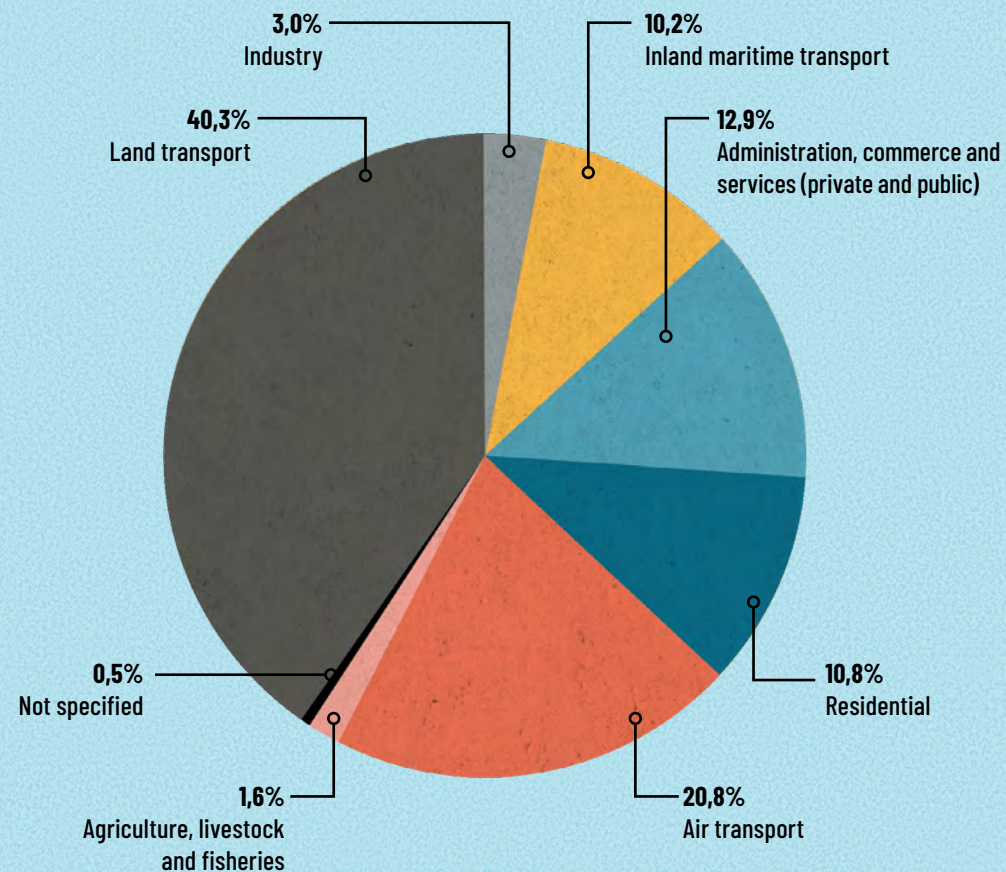
Source: Canary Islands Energy Yearbook (2021)

Geothermal

There are at least 36 low enthalpy geothermal installations in the Canary Islands, with a total power of 23.6 MWt. These installations are mainly located in tourist establishments (hotels and apartments) and their use is for heating domestic hot water (DHW) or heating swimming pools, among others.

The island with the highest tourist use of geothermal energy is Lanzarote (Canary Islands Energy Yearbook, 2021).

Low enthalpy geothermal power by islands and sectors (kW)
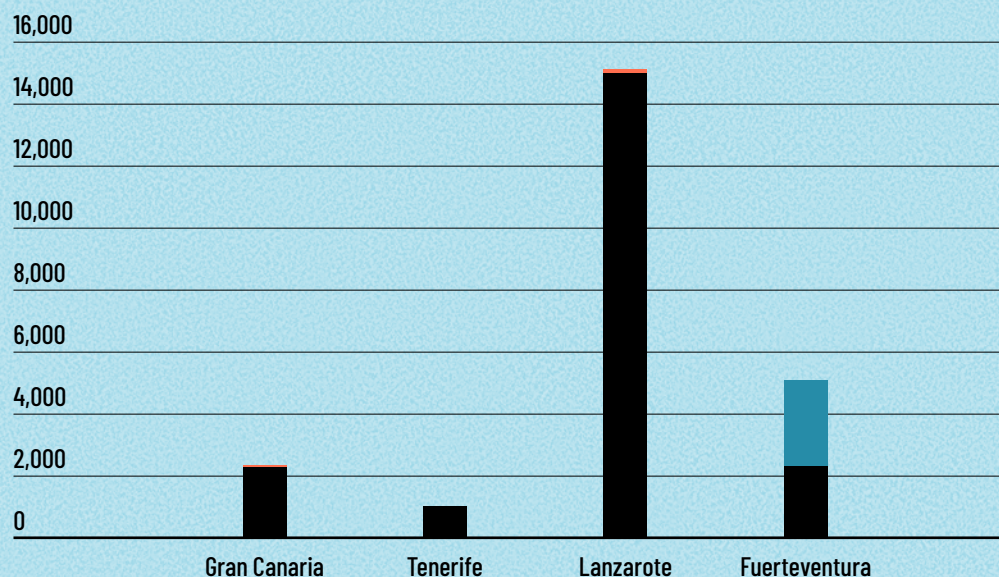
Source: Canary Islands Energy Yearbook (2021)

■ Tourist   ■ Services   ■ Commercial

Energy consumption in the services sector by municipality

Final energy consumption in the services sector in 2022.
Municipalities with consumption +50,000 (Megawatt hours).

- 51,788.94 - 86,942.81
- 86,942.81 - 106,257.06
- 106,257.06 - 224,064.57
- 224,064.57 - 507,906.44
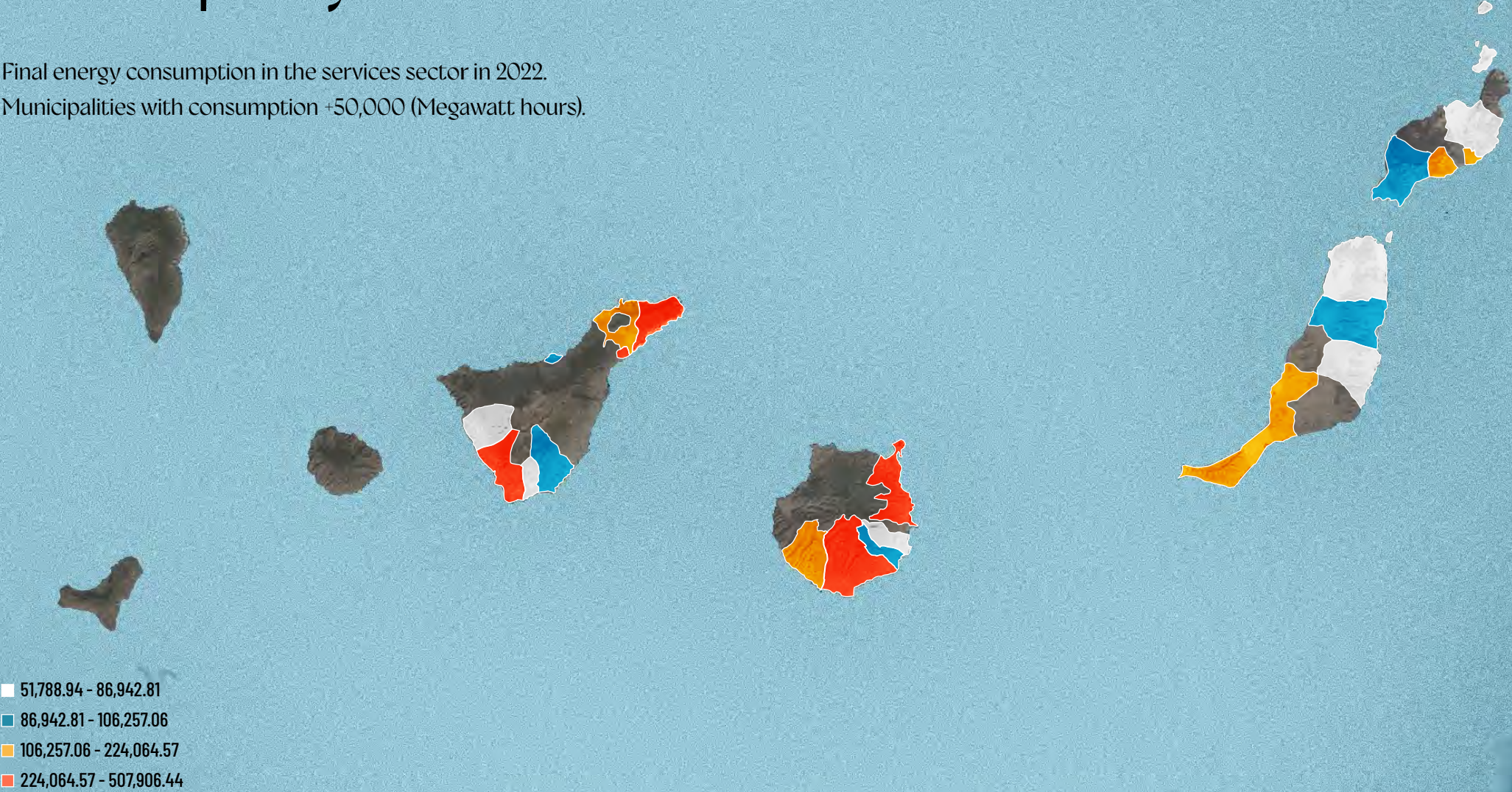
Renewable energies

Electricity production from renewable sources in the Canary Islands, year 2021

Legend

- 🌀 ⬤ Wind
- 🏭 ○ Photovoltaic
- ≈≈ Small hydro
- 🌊 Hydrowind
- 🔥 Biogas (landfill)

Coverage of electricity demand by renewables (R/T)

- ⬜ 0% <5%
- 🟦 5% - <10%
- 🟨 10% - <15%
- 🟥 >15%
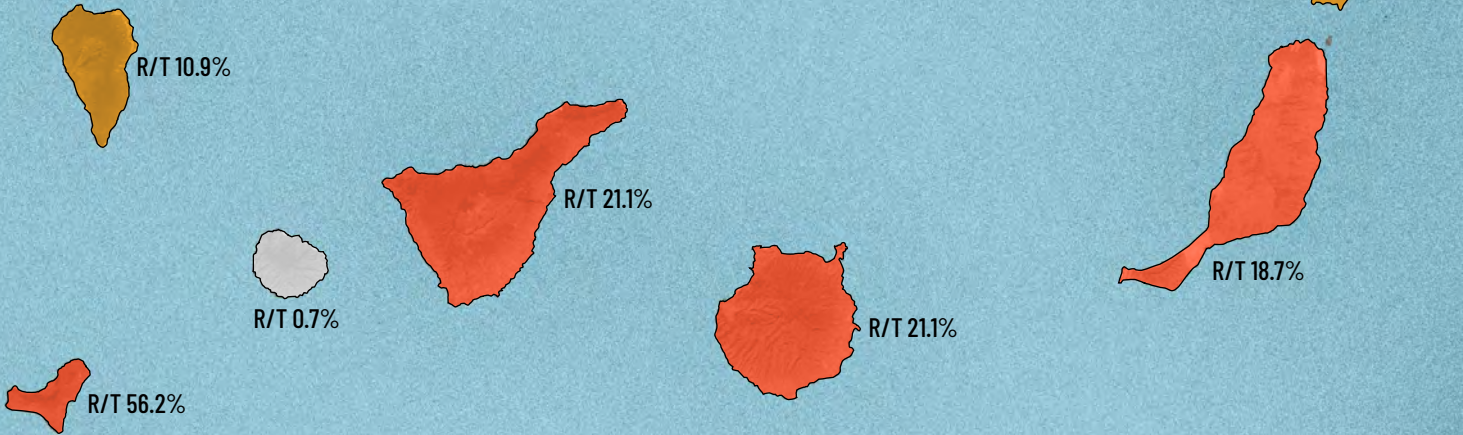
(1) For the El Hierro hydroelectric plant, the total wind energy generated before own consumption and pumping is considered.

(2) Renewable energy includes renewable energy produced for self-consumption and not fed into the grid.

(3) Gross thermal energy (at alternator termals) has been considered for the calculation of total energy.

La Palma

🌀	22,075 (+18.3% ↑)
🏭	7,154 (−7.3% ↓)
≈≈	0 (0% =)
	29,229 (+10.8% ↑)

Tenerife

🌀	524,317 (+8.4% ↑)
🏭	182,588 (+3.3% ↑)
🔥	8,000 (−12.6% ↓)
≈≈	3,048 (−9.1% ↓)
	717,952 (+6.7% ↑)

Gran Canaria

🌀	632,976 (+26.5% ↑)
🏭	73,051 (+16.4% ↑)
🔥	4,640 (−0.2% ↓)
	710,667 (+25.2% ↑)

Lanzarote

🌀	65,696 (+11.5% ↑)
🏭	14,202 (+4.6% ↑)
🔥	475 (−34.7% ↓)
	80,373 (+9.8% ↑)

R/T 11.1%

R/T 10.9%

R/T 21.1%

R/T 0.7%

R/T 18.7%

R/T 21.1%

R/T 56.2%

El Hierro

🌊	23,088 (+18.2% ↑)
🏭	204 (+18.6% ↑)
	23,292 (+18.2% ↑)

La Gomera

🌀	115 (+27.8% ↑)
🏭	412 (+207.5% ↑)
	527 (+135.3% ↑)

Fuerteventura

🌀	97,696 (+94.4% ↑)
🏭	19,301 (+6.5% ↑)
	116,997 (+71.1% ↑)

Renewable production by autonomous region (GWh) and percentage of energy generated in the region (2022)

CANTABRIA 24%
358 GWh

BASQUE COUNTRY 11%
1,051 GWh

ARAGON 75%
15,298 GWh

CATALONIA 14%
5,913 GWh

ASTURIAS 21%
2,570 GWh

GALICIA 65%
14,525 GWh

CASTILE AND LEON 90%
20,744 GWh

NAVARRE 45%
4,177 GWh

RIOJA 48%
1,107 GWh

MADRID 42%
397 GWh

EXTREMADURA 39%
10,159 GWh

CASTILE-LA MANCHA 62%
15,776 GWh

BALEARIC ISLANDS 7%
404 GWh

VALENCIA 16%
3,031 GWh

MURCIA 23%
2,670 GWh

ANDALUSIA 46%
16,680 GWh

CANARY ISLANDS 20%
1,718 GWh

MELILLA 3%
6 GWh

- < 20%
- ≥ 20 a <40%
- ≥ 40 a <60%
- ≥ 60%

Checklist of main indicators of issue area 7:
Energy management

Indicator	Description	Availability	Source	Remarks
Proportion of renewable energies in primary energy use. Share of electricity production from renewable sources.	Tons of oil equivalent to the renewable energy sector. Total tonnes of oil equivalent of total primary energy.	Available	Canary Islands Energy Yearbook. Department of Ecological Transition, Fight against Climate Change and Territorial Planning, Government of the Canary Islands.	
Percentage of electric rental vehicles.		Not available		
Proportion of energy consumption by economic sector.	Tons of oil equivalent demand from the economic sector. Total tonnes of oil equivalent energy demand.	Partially available	Energy Yearbook. Regional Ministry of Ecological Transition, Fight against Climate Change and Territorial Planning, Government of the Canary Islands.	Tourism-related data are needed
Energy intensity by economic sector	Total tonnes of oil equivalent demand of the economic sector and value added of the economic sector.	Partially available	Energy Yearbook. Regional Ministry of Ecological Transition, Fight against Climate Change and Territorial Planning, Government of the Canary Islands.	Tourism-related data are needed

4.8 Water and wastewater management

The island Hydrological Plans provide data on water consumption in tourism. However, it is necessary to have indicators that allow regular monitoring of water consumption in this sector.

The INE's Statistics on water supply and sanitation provide data on water and wastewater management. In the year 2022, the data referring to 2020 have been published.

In terms of structural indicators of the network, in 2020 the length of the supply network per inhabitant in the Canary Islands is greater than in Spain: Canary Islands: 7.4 (metres/inhabitant); Spain: 5.6 (metres/inhabitant) (INE, 2022). Regarding the length of the sewage system per inhabitant, that of the Canary Islands is lower, at 2.4. In the case of Spain it is 3.1 (metres/inhabitant) (INE, 2022).

In the Canary Islands, real losses per km of supply network increased by 8% in 2020 compared to 2018, while in Spain they decreased by 1% (INE, 2022).

In terms of economic indicators, the average cost per m³ of water supplied increased in the Canary Islands from €2.10/m³ in 2018 to €2.20/m³ in 2020, while in Spain it remained stable (€1.91/m³ in 2018 and €1.92/m³ in 2020) (INE, 2022).

The average cost per m³ of water supply in the Canary Islands increased, rising to €1.82/m³ in 2020, whereas in 2018 it was €1.72/m³. However, the cost of sewerage and wastewater treatment remained stable between these years (€0.38/m³) (INE, 2022).

Regarding consumption in tourism, estimates referring to water consumption in the accommodation sector have been obtained in academic studies, such as those of Ruiz-Rosa et al. (2019) and Estévez-Bauluz (2021). The most recent estimate, from 2018, indicates a consumption of 329.49 litres per night in the case of hotels and 282.4 litres per night in apartments (Estévez-Bauluz, 2021).
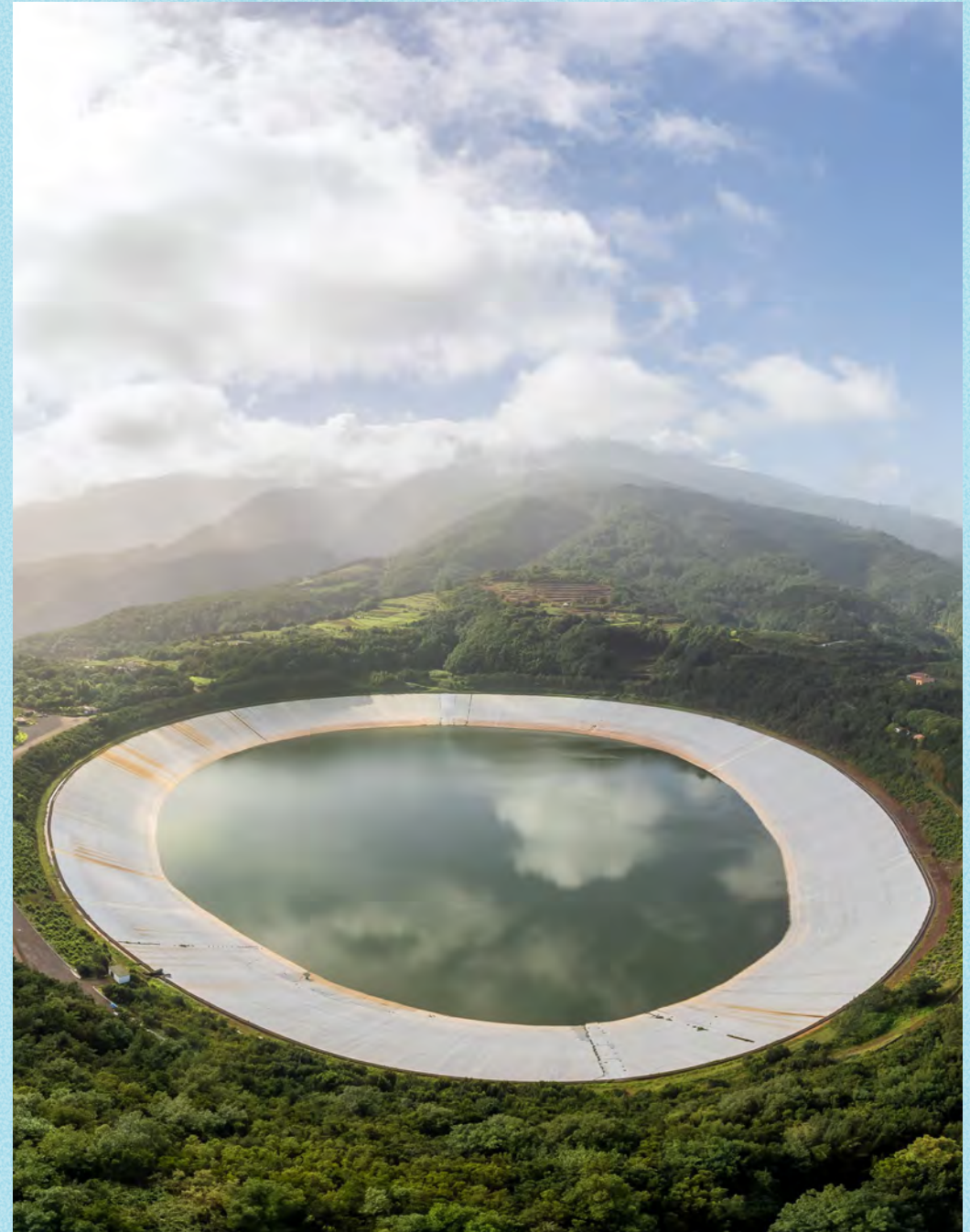
Potable water consumption in the Canary Islands

The water registered and distributed in the Canary Islands in 2020 accounted for 4.4% of the total in Spain in the same year.

The volume of water supplied to the public supply network in the Canary Islands fell from 267 litres/inhabitant/day to 258 litres/inhabitant/day between 2018 and 2020 (pandemic). There was also a decrease in the volume of water registered and distributed to households, from 135 litres/inhabitant/day in 2018 to 125 li-tres/inhabitant/day in 2020 (INE, 2022).

Total volume of potable water registered and distributed by type of user in the Canary Islands (thousands of m³)
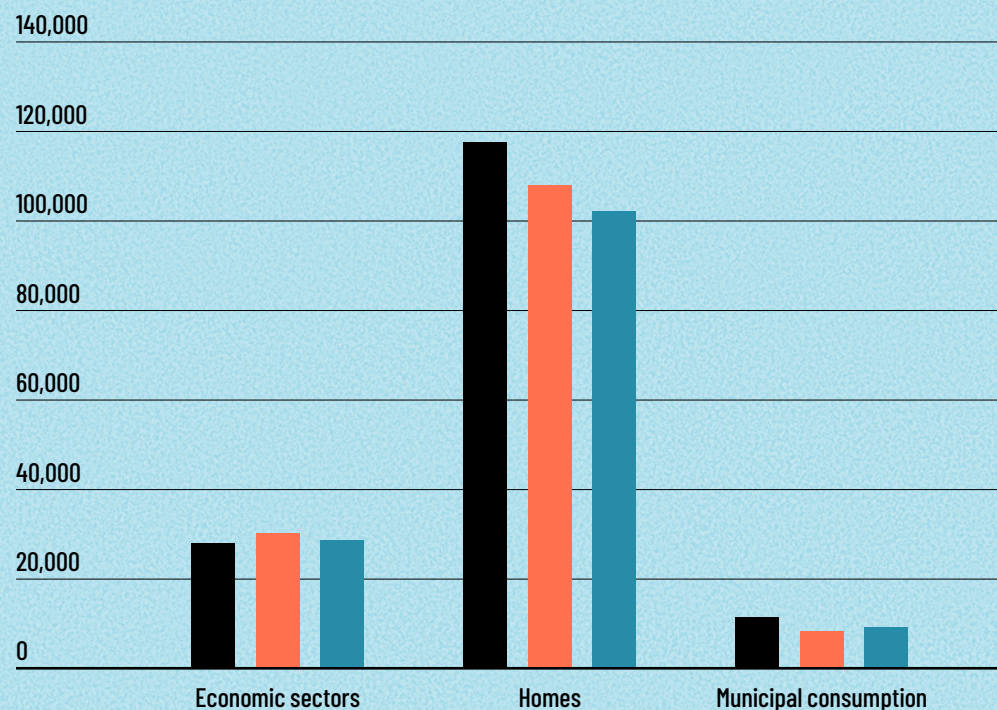
2016
2018
2020

Note: Only includes water supplied in low water supply
Source: Statistics on water supply and sanitation (INE).

Waste water

The volume of treated waste water and reused water in the Canary Islands has increased since 2018. Specifically, the volume of treated waste water increased by 10% to 0.142 m³/inhabitant/day and the volume of reused water increased by 17% in 2020 to 0.034 m³/inhabitant/day.

Distribution of waste water by destination in the Canary Islands (2013-2020)
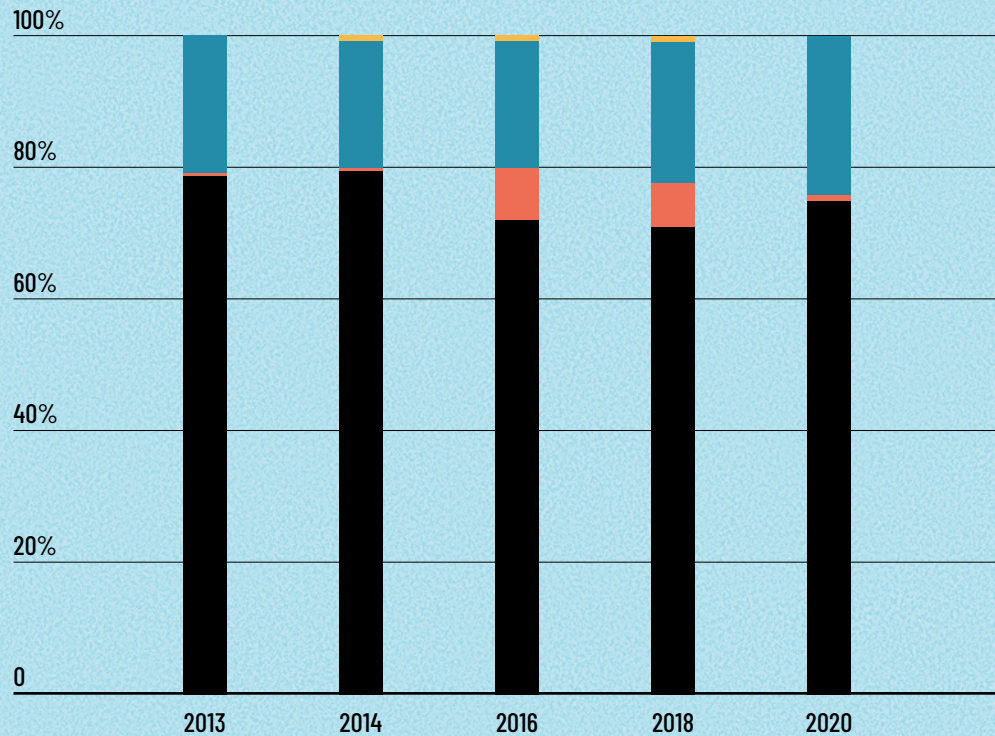
Legend:
- To the sea (black)
- To a watercourse (orange)
- Reused water (blue)
- Others (yellow)

Source: Statistics on water supply and sanitation (INE).

Distribution of water use as estimated by Island Councils

Uses of water supplied in Gran Canaria

- **0,4%** Energy
- **3,4%** Other uses
- **0,2%** Recreational
- **3,0%** Golf
- **3,7%** Industrial
- **36,6%** Domestic
- **10,0%** Tourist
- **42,6%** Agricultural
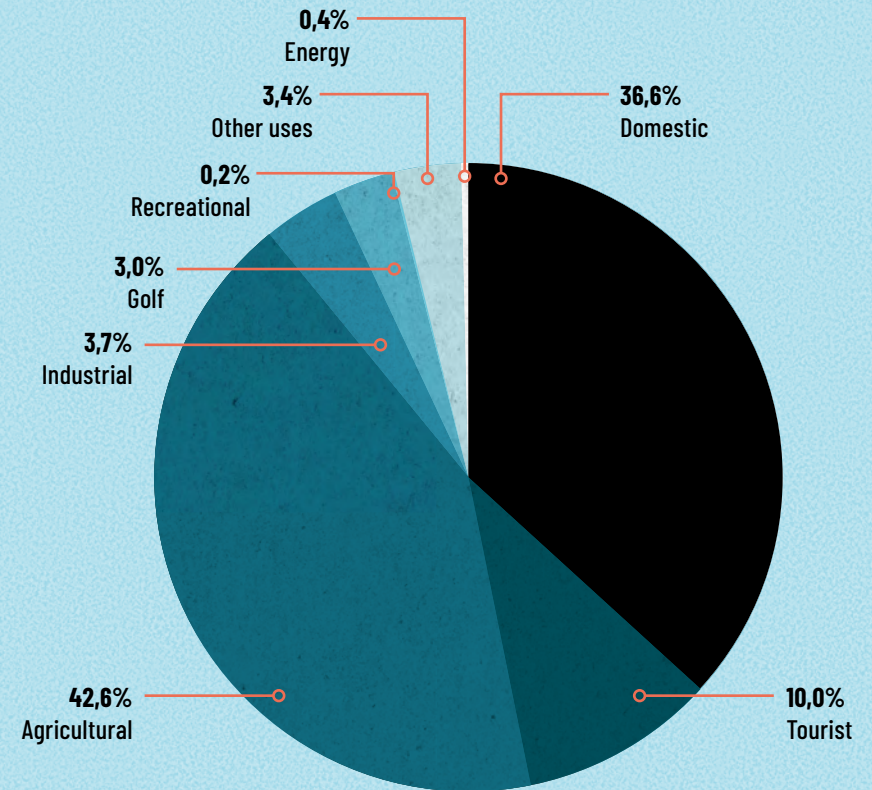
Source: Gran Canaria Island Water Board (2023). Hydrological Plan of Gran Canaria. Planning Cycle 2021-2027. Report (2023).

Distribution of water use as estimated by Island Councils

Use of water supplied in Fuerteventura.

53%
Industry - Tourist

43%
Urban

4%
Agriculture/Livestock
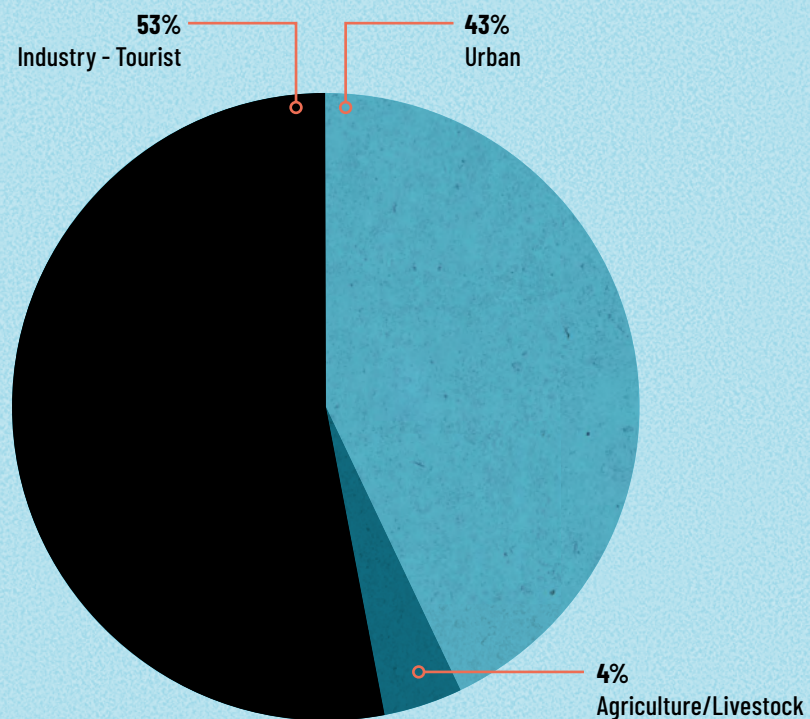
Source: Fuerteventura Island Water Board (2019). Hydrological Plan of the Fuerteventura Hydrographic Demarcation. Second cycle review (2021-2027). Report (2019).

Uses of water supplied in Tenerife.

11%
Tourist

1%
Service

2%
Industrial

2%
Golf

39%
Urban

45%
Agriculture
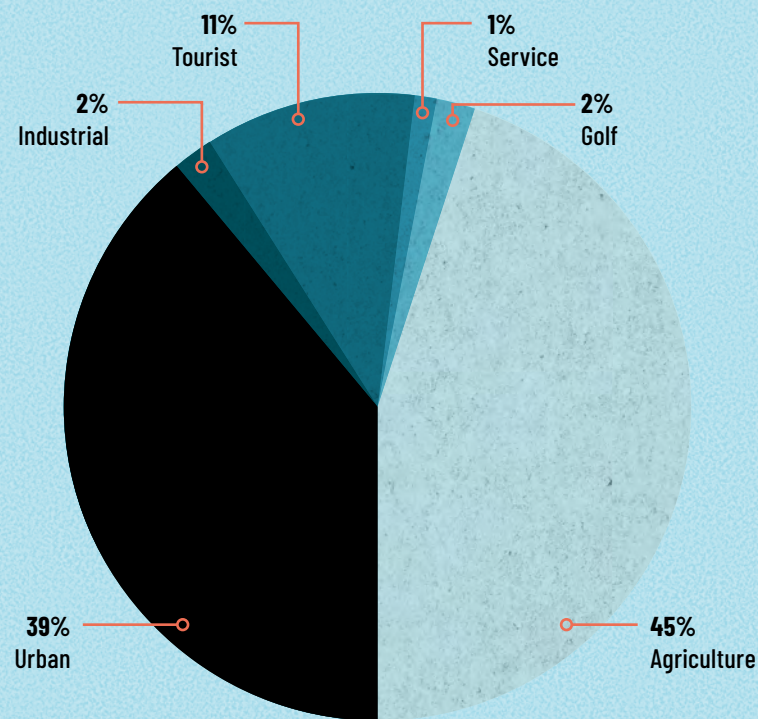
Source: Tenerife Island Water Board (2020). Diagram of important issues in the Tenerife Hydrographic Demarcation. Third hydrological planning cycle 2021-2027 (2020).

Distribution of water use as estimated by Island Councils

Uses of water supplied in Lanzarote.

9,9%
Other uses

0,6%
Recreational

2,5%
Golf

3,2%
Industrial

4,1%
Agricultural

44,5%
Tourist

35,2%
Domestic
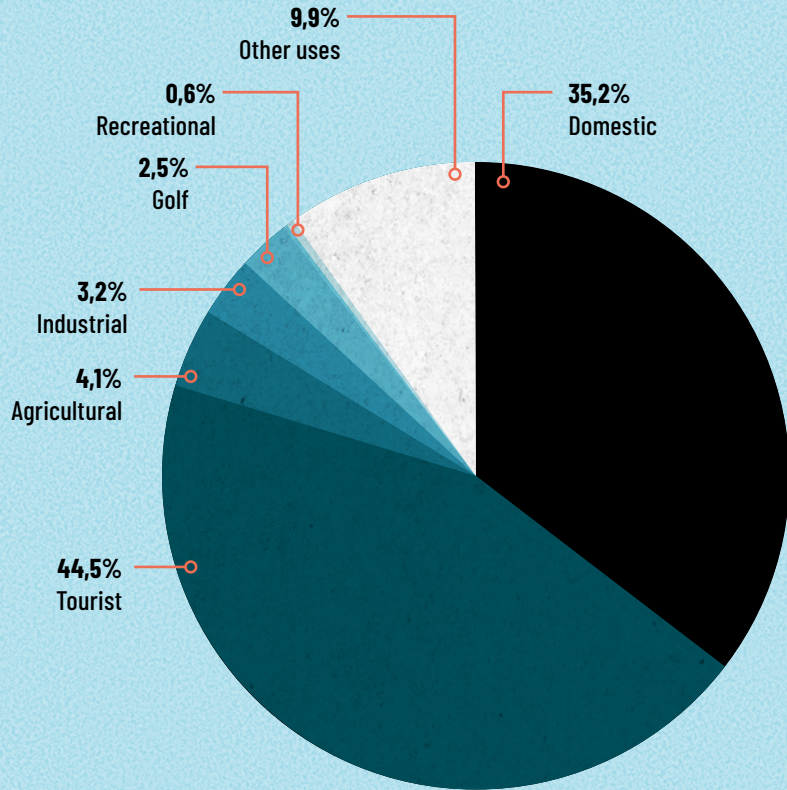
Source: Lanzarote Island Water Board (2021). Lanzarote Hydrological Plan. Proposal for the draft Plan. Planning Cycle 2021-2027. Report (2021)

Uses of water supplied in La Gomera.

5%
Recreative

59%
Agriculture

23%
Domestic

8%
Tourist

5%
Industrial
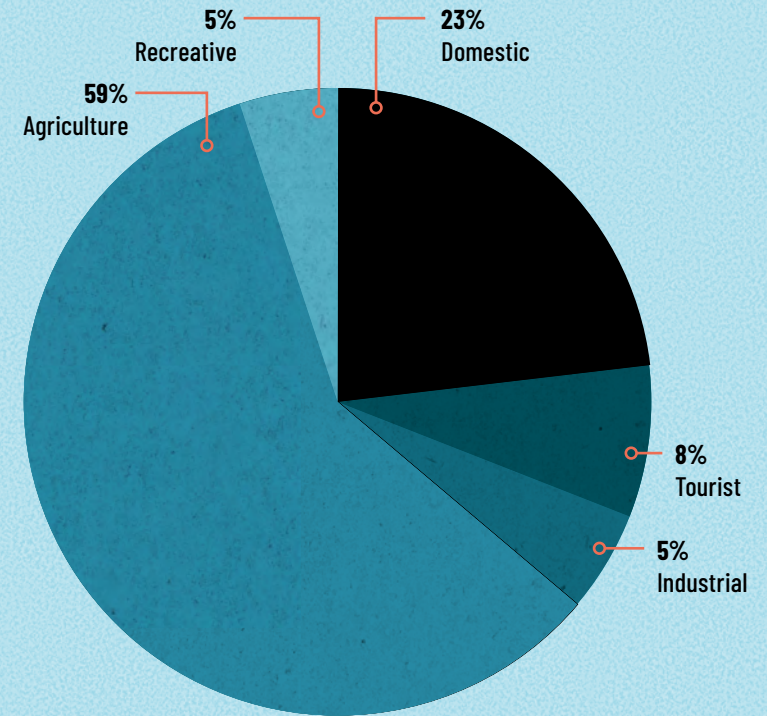
Source: La Gomera Island Water Board (2021). Outline of important water management issues. Third hydrological planning cycle (2021-2027).

Distribution of water use as estimated by Island Councils

Uses of water supplied in La Palma.

0,10% Livestock Farming

9,02% Supply

2,30% Tourist

0,65% Industrial

87,93% Agriculture
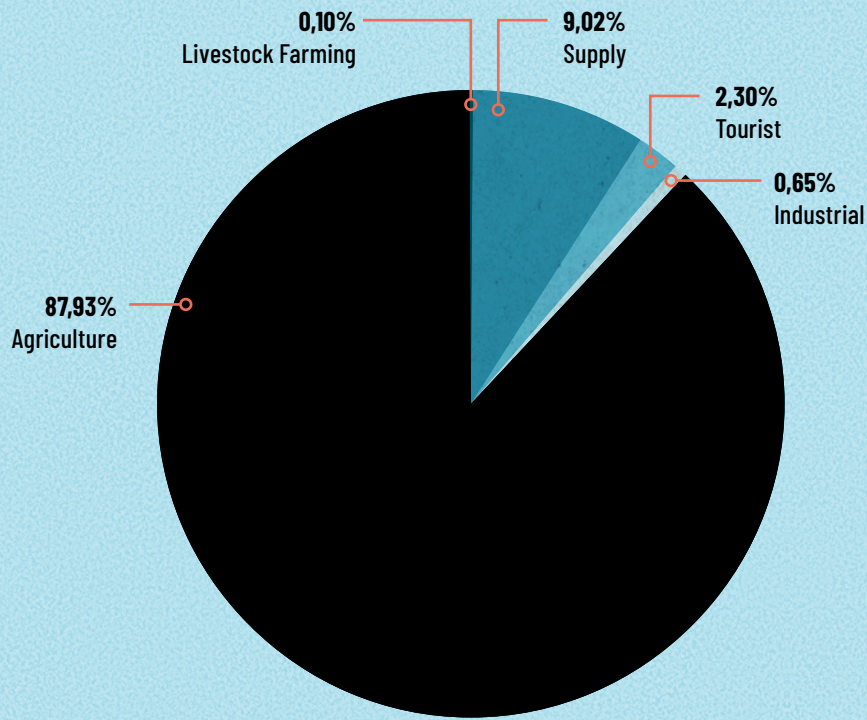
Source: La Palma Island Water Board (2021). Hydrological Plan of La Palma. Planning Cycle 2021-2027. Memoria (2021).

Uses of water supplied on El Hierro.

0,61% Energy

1,95% Industrial

0,10% Livestock Farming

51,44% Agriculture

43,47% Supply

2,43% Tourist
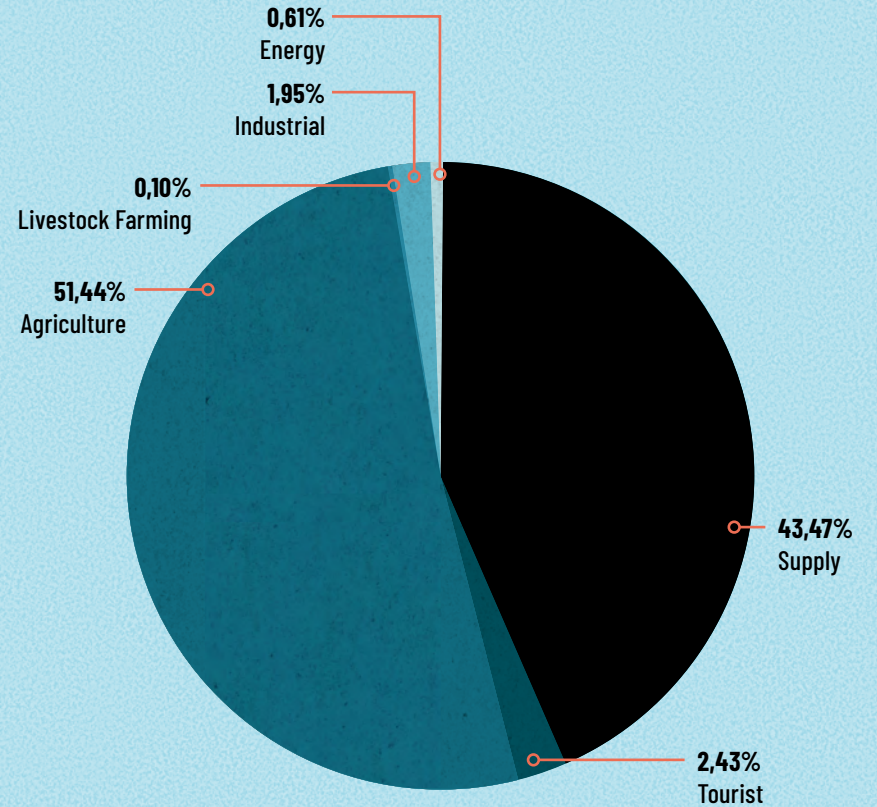
Source: El Hierro Island Water Board (2018). Hydrological Plan of El Hierro. Hydrological Planning Cycle 2015-2021. Strategic environmental document.

Sewage discharges

During 2022 and 2023 some beaches were closed to public use in the Canary Islands due to pollution problems related to the irregular discharge of waste water into the sea. This is a recurring issue in many parts of the islands, sometimes with a very significant impact on the tourism sector and on the enjoyment of the beach by Canarian residents.

72% of the wastewater discharge points into the sea registered in the Canary Islands are not authorised. Of these, 48% have no authorisation and are not in the process of obtaining one; 19% are not authorised but are in the process of obtaining it; and 4% have authorisations that have already expired.

The island with the highest number of unauthorised points is Tenerife (67), followed by Gran Canaria (30).

The island of El Hierro does not have any authorised points. In general, the most common type of discharge in the Canary Islands is urban waste water (54%), salt water discharges (14%) and brine (13%). Data from the Census of Discharges from land to sea, Government of the Canary Islands (2021).

Unauthorised discharges from land to sea (2021)
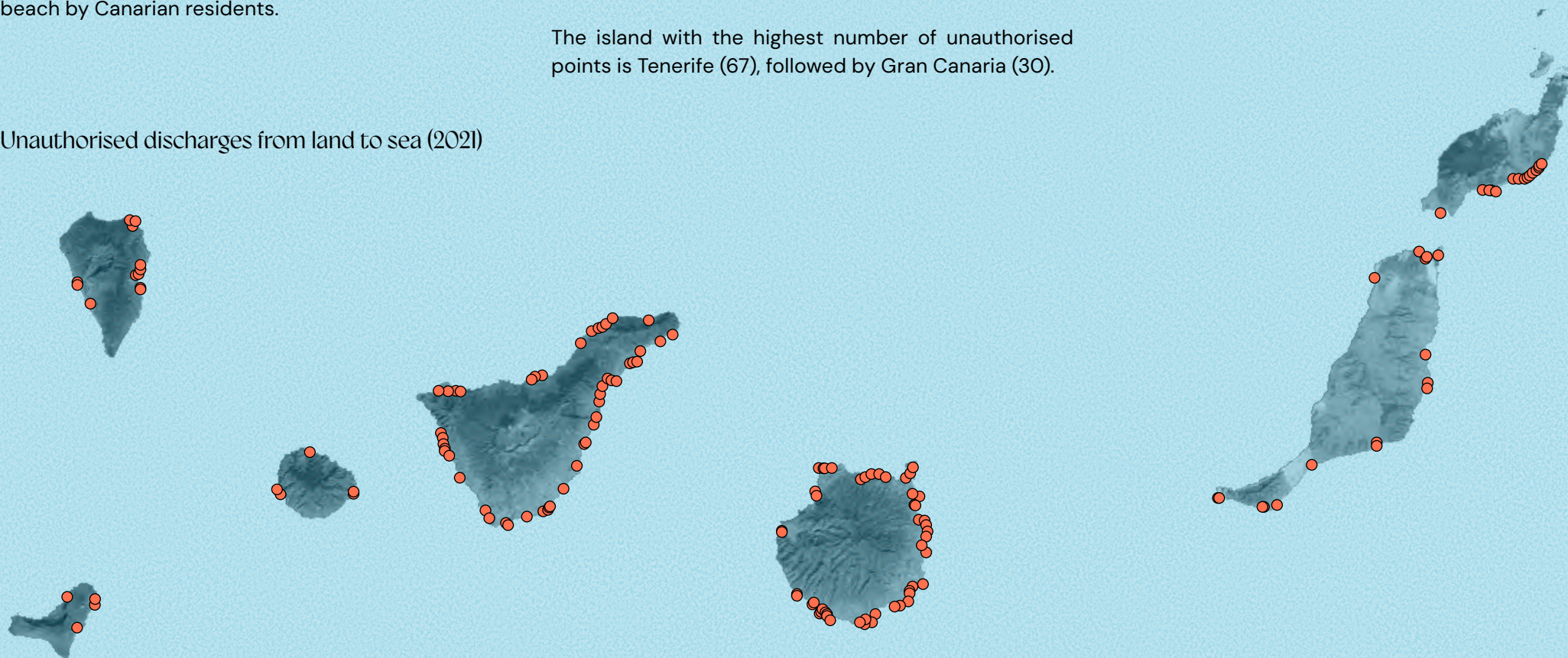
Source: GRAFCAN (2023). Census of discharges from land to sea. Territorial Information System of the Canary Islands - IDECanarias.
Data compiled from the Census of discharges from land to sea of the Government of the Canary Islands. Report 2021.

Bathing water quality

According to data from the Ministry of Health, in 2022, of the 213 beaches registered in the Canary Islands, 205 obtained a rating of excellent, 6 good and only 1 beach obtained a rating of insufficient. In order to consider the bathing water quality of a beach as good, it is required that no more than 500 units of E. coli bacteria and 200 units of intestinal enterococcus per 100 millilitres of sample water are exceeded.

In 2022, the beaches in the Canary Islands that were not rated as excellent, but good, were: Mogán Beach, Las Canteras Beach (Measurement Point 3) in Gran Canaria; Muelle Viejo Beach in Corralejo (La Oliva), Fuerteventura; Punta Larga Beach (Candelaria), Jardin Beach and San Telmo Beach (Puerto de la Cruz), in Tenerife. The problems on some of these beaches were solved in 2022, but in some cases, such as the Muelle Viejo Beach in Corralejo, they are problems that have been repeated from previous years.

The most serious case has been Confital Beach in Las Palmas de G.C., which was rated as inadequate in 2022. In fact, this beach has lost the consideration of bathing area in 2023 due to repeated pollution problems.

Evolution of E. coli measurements in Playa del Confital. 2022
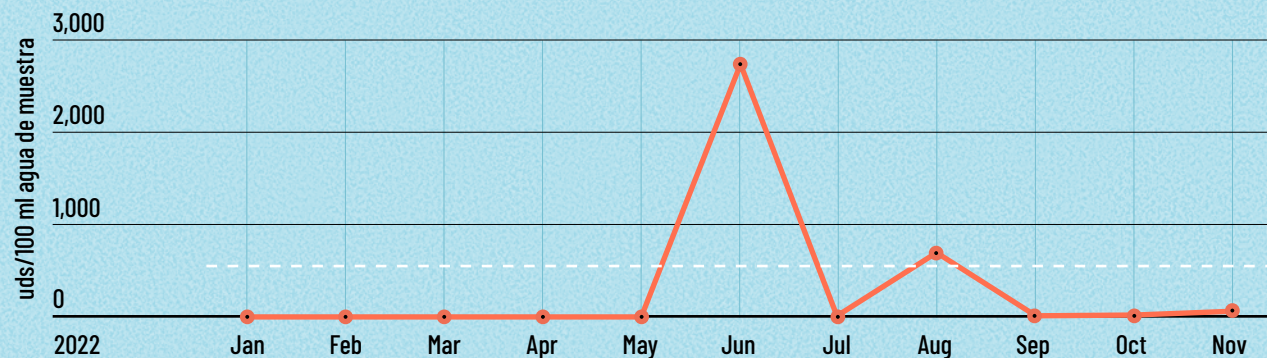
Source: Ministry of Health, Government of Spain. Taken from Dataestur — — — Maximum limit of E. coli units: 500

Evolution of intestinal enterococcus measurements in Confital Beach. 2022
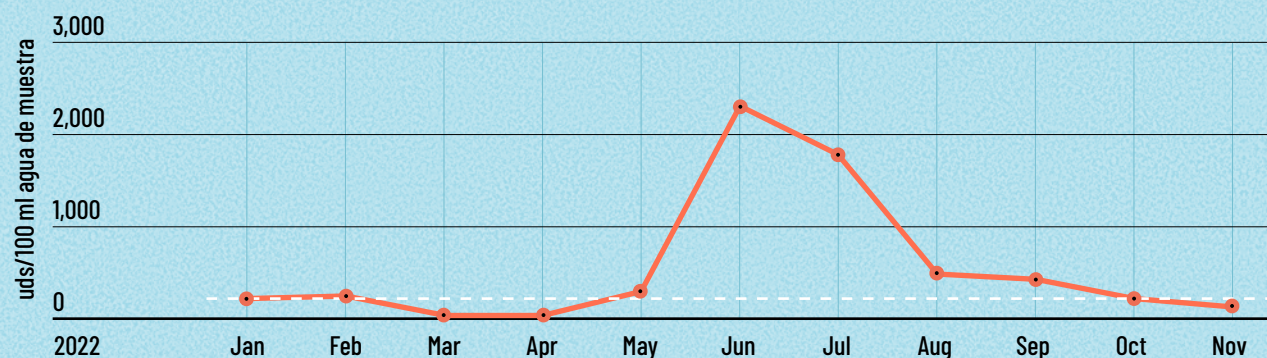
Source: Ministry of Health, Government of Spain. Taken from Dataestur — — — Maximum limit of Enterococcus units: 200

Checklist of main indicators of issue area 8:
Water and wastewater management

Indicator	Description	Availability	Source	Remarks
Percentage of consumption in the tourism sector	Estimated water use of the tourism sector (accommodation, golf courses and recreation) by island.	Occasional data	Hydrological planning of the Island Water Councils (CIA)	These are mainly estimates based on water allocations by use and do not provide homogeneous tourism uses.
Total volume consumed and litres per tourist per day	Total water consumed in the tourism sector (cubic metres) and per guest-night (litres). It could also be compared with the consumption per inhabitant per day in the area.	Occasional data	Estimating academic research based on previous research	Indicators from official statistical sources, methodologies are needed to understand and compare water consumption in tourism on the demand and supply side
Water awareness among businesses	Percentage of tourism enterprises that take various measures to reduce water consumption	Not available		
Uses of non-conventional water production systems in tourism: purification and desalination	Percentage of water use derived from water produced at destination	Occasional data	Canary Islands Water Centre Foundation	Updating is needed

Solid waste management

There is no good official data to measure and control waste generation in the tourism sector, as it is counted together with residential waste as municipal solid waste.

Waste collection figures come from the INE's Statistics on Waste Collection and Treatment, which in 2022 published data referring to 2020. The ISTAC also provides a Compilation of Waste Statistics.

In achieving the objectives of the new European Circular Economy Package in tourism-intensive regions, the classification of tourism activities in a differentiated way is key. In this way, waste generation from tourism should be treated specifically from a fiscal and regulatory point of view, as distinct from other domestic or commercial waste.

Waste generation

The Canary Islands is the third autonomous region in Spain that collects the highest amount of waste per capita in 2020 (546.7 kg/inhabitant), an amount much higher than the national average (473.3 kg/inhabitant) (INE, 2022). This circumstance is related to tourist activity, since all the waste generated by visitors and residents is distributed only among residents without any differentiation.

The Canary Islands are among the five autonomous regions that collected the greatest amount of urban waste in 2020; a total of 1.2 million tonnes, which represents 5% of urban waste in Spain in 2020. In terms of type of waste, 80% is mixed waste; 3% glass; 7.6% paper and cardboard and 3% mixed packaging (INE, 2022). The following graph shows the waste per inhabitant collected in the Canary Islands (kg) differentiated by type of waste. In 2020, the collection of paper and cardboard increased significantly.

Municipal waste collection by Autonomous Region in 2020 (kg/inhabitant)

Source: Statistics on the Collection and Treatment of Waste (INE)

Waste per inhabitant collected in the Canary Islands (kg)

Source: Waste Statistics (ISTAC)

■ Paper and cardboard
■ Glass
■ Mixed packaging
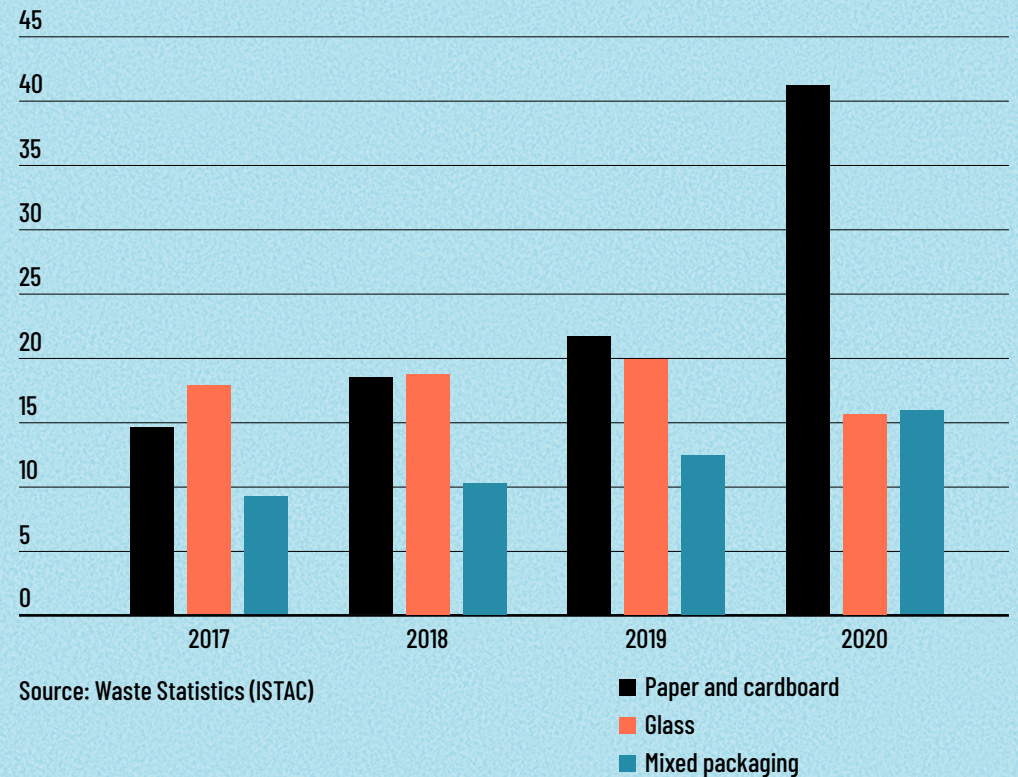
Household Waste Recycling Centres and collection

Separately collected waste accounted for 20.1% of total waste in the Canary Islands in 2020, while for the country as a whole the percentage is higher, at 22.7%. However, if we compare the data with respect to 2019, we can see that in the Canary Islands the percentage of separately collected waste increased much more notably than in Spain as a whole, since in 2019 this percentage amounted to 16.4%, while in Spain it was 22% of the total (INE, 2022).

The Canary Islands have 30 Household Waste Recycling Centres or "Puntos Limpios", which are facilities for the collection and storage of urban waste.

Household Waste Recycling Centres (Puntos Limpios) in the Canary Islands (2023)
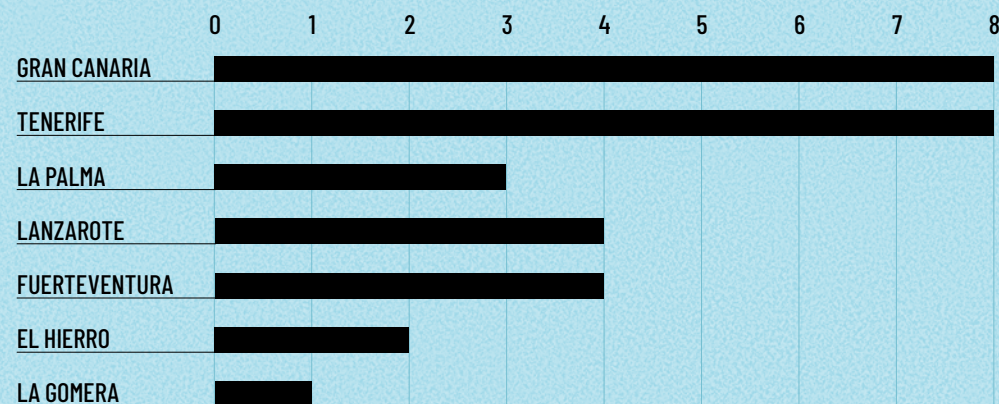
Source: Island Councils and PIRCAN (Government of the Canary Islands)

Evolution of separate collection as a proportion of total waste (%).

Source: Statistics on the Collection and Treatment of Waste (INE)

- ■ Spain
- ■ Balearic Islands
- ■ Canary Islands

Research on waste generated by tourism

Various studies carried out in the academic field have addressed the measurement of waste generation in the tourism sector. The contribution of the tourism sector (accommodation and restaurants) to mixed waste generation has been estimated to be 19% in 2019 (Díaz–Fariña et al., 2020).

Díaz–Fariña et al. (2020) have observed that the estimate of waste generated by tourism via supply is much higher than the estimate through overnight stays (via demand).

More research is needed in this area.

Contribution of tourism activities to the generation of mixed waste, via demand (overnight stays), in the Canary Islands

Year	Value
2010	11
2011	12
2012	12
2013	13
2014	13
2015	14
2016	15
2017	15
2018	14
2019	14
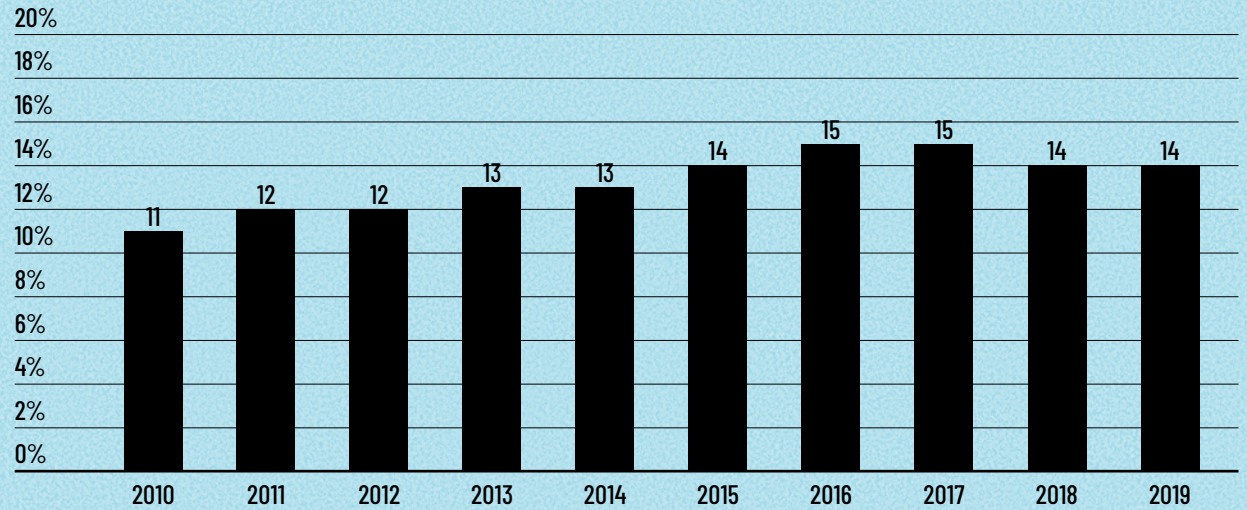
Source: Own elaboration based on Díaz-Fariña et al., 2020.

Contribution of accommodation and restaurants to the generation of mixed waste in the Canary Islands.

Year	Value
2010	11
2011	12
2012	13
2013	14
2014	14
2015	15
2016	17
2017	17
2018	17
2019	19
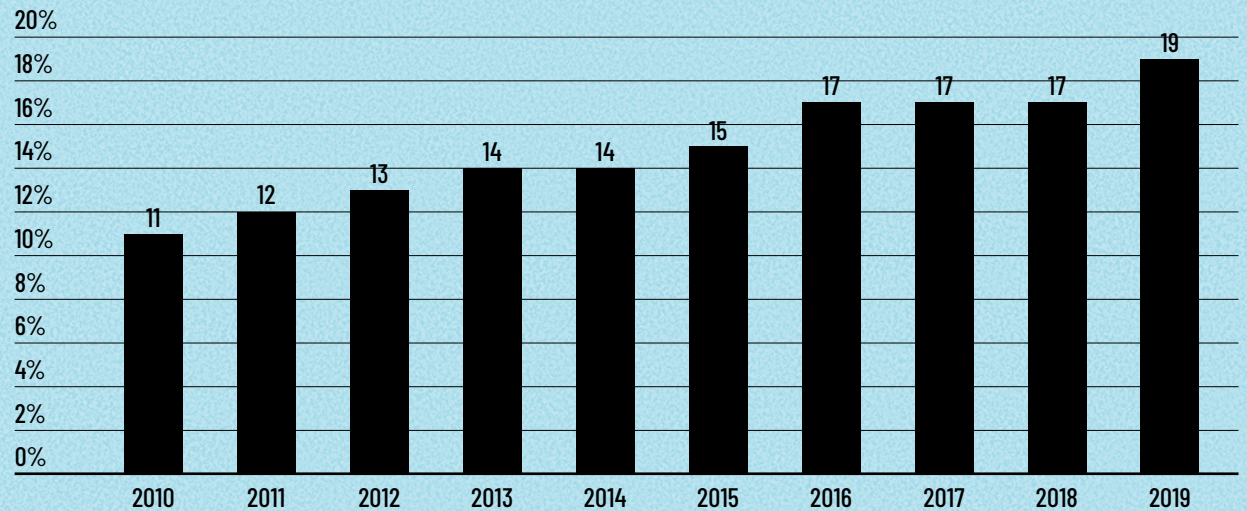
Source: Own elaboration based on Díaz-Fariña et al., 2020.

An experience of good practices in waste management: Circular Tourist Communities

One of the most feasible opportunities for sustainable waste management in islands is the treatment of bio-waste, not only because it represents a significant proportion of total mixed waste, but also because its reuse can be carried out in a delocalised manner.

Along these lines, it is worth mentioning the 'Circular Tourist Communities' initiative developed in the municipality of Adeje (Tenerife), led by Ashotel and Asaga-Asaja Canarias and supported by different agents from the public and private spheres, which unites two economic sectors as important for the archipelago as tourism and agriculture.

It involves 12 hotels in the municipality, which provide the agricultural company Serviagroc with the bio-waste generated in these establishments. With this raw material, high quality compost is produced for use in agro-ecological farms, municipal gardens and the gardens of the hotels themselves. This closes the nutrient cycle, avoiding dependence on external products and promoting sustainability by turning waste into a valuable resource.

In the first year of the project, the dumping of 570 tonnes of bio-waste in the Arico Landfill Site has been avoided (Ashotel, 2023). This reduces the negative environmental impacts, as the volume of waste buried in these facilities is reduced, in turn minimising pollution, as the decomposition of this type of waste under these conditions occurs anaerobically (in the absence of oxygen), which generates greenhouse gases.

Source: Photographs provided by Ashotel

Checklist of main indicators of issue area 9:
Solid waste management

Indicator	Description	Availability	Source	Remarks
Mixed waste volume produced by destination (pressure)	Tonnes per resident per year	Partly available / occasional data	Statistics on the Collection and Treatment of Waste (INE) Academic research	Regular data on the production and management of solid waste by tourism characteristic activities is needed.
Waste management awareness in tourism	Percentage of tourism enterprises sorting different types of waste	Not available		
Volume of sorted waste (recycling effort)	Percentage or per resident sorted waste volume per year	Partly available / occasional data	Statistics on the Collection and Treatment of Waste (INE) Academic research	Regular data on the production and management of solid waste by tourism characteristic activities is needed.

4.10 Natural capital supporting tourism. Protected areas and fragile ecosystems

The Canary Islands, the most important centre of biological diversity in the European Union, is one of the world's 25 biodiversity hotspots. Around 38% of the fauna species are endemic to the archipelago. In addition, the Canary Islands are home to more than half of Spain's plant endemisms (Sosa-Henríquez, 2019).

The Canary Islands are home to about 80% of the cetacean species found in the North Atlantic, such as whales, dolphins and beaked whales (Government of the Canary Islands).

Among the main threats to terrestrial biodiversity are habitat destruction and fragmentation as well as pollution. In the case of marine biodiversity, threats include the presence of pollutants and waste, alteration of the coastal seaside and recreational or commercial activities (Government of the Canary Islands).

There is a need for data to monitor the impact of tourism on natural environments. Given that 40% of the surface area of the islands is part of a protected natural area, it is necessary to carry out adequate monitoring of the impacts of tourism on these areas.

Importance of the publication of commitments and good practice manuals such as the Charter for Sustainability for whale watching (2018) and Effects of active and nature tourism activities on the biodiversity of the Canary Islands terrestrial environment. Manual of good practices (2022).

Natura 2000 Network.
The Canary Islands is the region of Spain that contributes most to the Natura 2000 Network, with marine and terrestrial sites. Area: 3,613.27 km2 (132.26 km^2 marine and 3,481.01 km^2 terrestrial)
- 153 Special Areas of Conservation (SACs)
- 43 Special Protection Areas for Birds (SPAs)
- 12 areas have the dual status of SPA and SAC (Canary Islands Government)

146 **Protected Natural Spaces**, 301,666.5 ha, which represents 40% of the surface area of the Canary Islands (ISTAC).

Biosphere Reserves: Fuerteventura; La Gomera; Gran Canaria (46% of the island); El Hierro; Lanzarote; Macizo de Anaga (Tenerife); La Palma.

Marine reserves of fishing interest:
- Marine reserve around the island of La Graciosa and the islets to the north of Lanzarote.
- Marine reserve around Punta de la Restinga-Mar de Las Calmas
- Marine reserve on the island of La Palma.

Starlight Reserves: Fuerteventura; Cumbres de Tenerife; La Palma (Starlight Foundation).

Global Geoparks Network: El Hierro Geopark; Lanzarote and Chinijo Archipelago Geopark.

Wetlands of international importance (Ramsar list): Saladar de Jandía or Playa del Matorral (Fuerteventura).

Biodiversity

22.9% of the fauna species of the Canary Islands are island endemics and 16.6% are pluri–island endemics (Canary Islands Biodiversity Data Bank, 2023).

In terms of protected terrestrial species, Tenerife is the island with the highest number of endemic species and island endemisms.

Terrestrial endemic species in the Canary Islands (2023)

	Fungi	Plants	Animals
Island endemisms	175 (4.3%)	333 (11.8%)	2,064 (22.9%)
Plurinsular endemisms	67 (1.7%)	294 (10.4%)	1,495 (16.6%)
Non-endemic	3,790 (94%)	2,197 (77.8%)	5,499 (60.5%)
Total	4,032 (100%)	2,824 (100%)	9,058 (100%)

Source: Canary Islands Biodiversity Data Bank - BIOTA (Government of the Canary Islands).

Protected terrestrial species (fauna and flora). Distribution by island (2023)
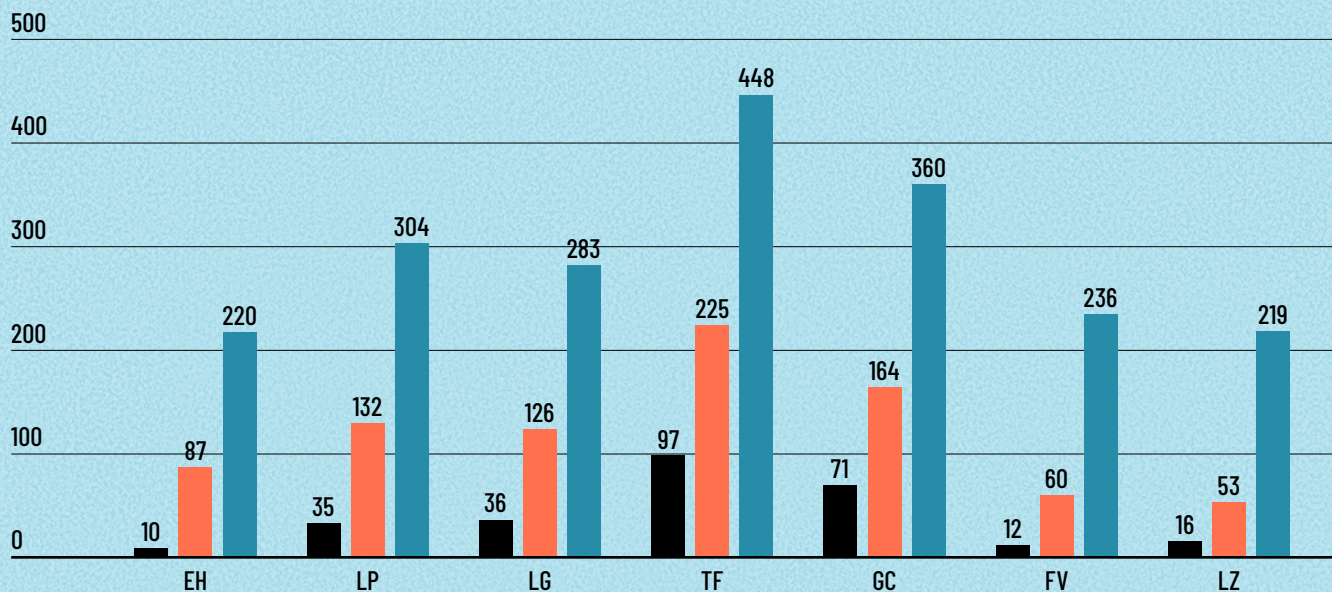
Source: CENTINELA. Canary Islands Natural Inventory Bank (Government of the Canary Islands).

- ■ Island endemisms
- ■ Endemic species
- ■ Wild species

Protected marine species (fauna and flora). Wild species. Distribution by island (2023)
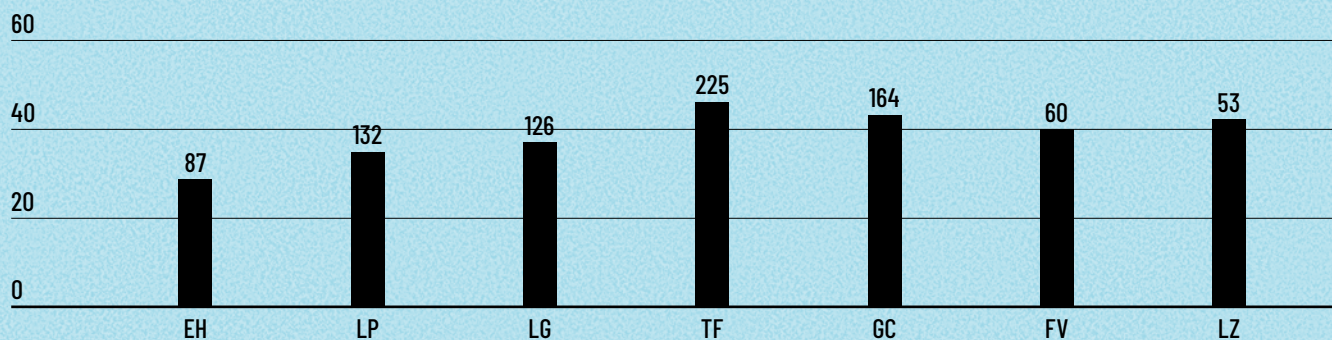
Source: CENTINELA. Canary Islands Natural Inventory Bank (Government of the Canary Islands).

Protected natural areas

Among the Protected Natural Spaces, the 11 Natural Parks stand out for their size: they represent 37% of the total surface area of Protected Natural Spaces. In second place, the 7 Rural Parks, which make up 28% of the total surface area.

Protected Natural Spaces in the Canary Islands. 2023

Ranking	Surface area (Ha)	Num. of Protected Natural Spaces (PNS)
National Park	32,771.50	4
Natural Park	111,022.20	11
Country Park	83,540.80	7
Integral Nature Reserve	7,474.00	11
Special Nature Reserve	14,762.70	15
Natural Monument	29,806.90	52
Protected Landscape	39,098.20	27
Site of Scientific Interest	1,401.90	19
Total	301,666.5	146

Source: Statistics on Protected Natural Spaces (ISTAC).
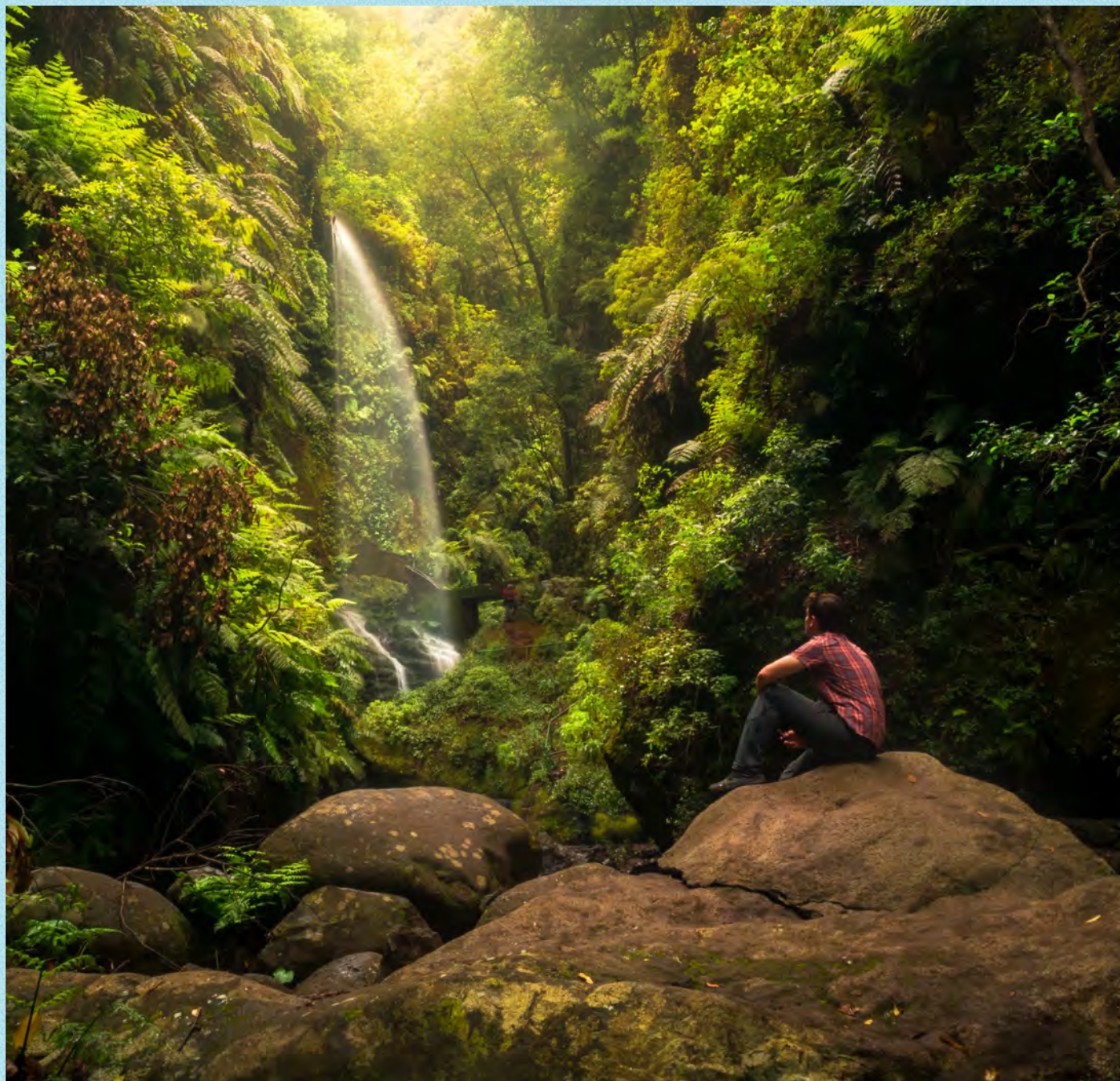
National Parks

Teide National Park (Tenerife)
Total area: 18,990.00 ha. In 2019, it received 28.9% of the total estimated number of visitors to the National Parks Network. 74% of visitors come by car; 26% by bus (guagua). Average number of visitors per day: over 10,000. 6% go to Visitor Centres (Situación de la Red de Parques Nacionales, 2021). 26% of visitors to the National Parks Network in 2021 (Organismo Autónomo de Parques Nacionales, 2021). In 2022, as in the rest of the National Parks of the Canary Islands, and marked by the recovery of tourism figures after COVID-19, the upward trend in visits continued, with 4,264,268 visits recorded, some 200,000 fewer than in 2019 (the year of maximum visitor numbers).

Garajonay National Park (La Gomera)
Total area: 3,984.00 ha. In 2019, it received 6.6% of the estimated total number of visitors to the National Park Network. High pressure from visitor load (Situación de la Red de Parques Nacionales, 2021). In 2021, 5% of visitors to the National Parks Network, which represent 598,621 visits, were registered (Organismo Autónomo de Parques Nacionales, 2021). In 2022, the figures continued to increase, reaching 661,446 visitors.

Timanfaya National Park (Lanzarote)
Total area: 5,107.50 ha. In 2019, it received 10.6% of the total estimated number of visitors to the National Parks Network. Half of them visit by private vehicle (Situación de la Red de Parques Nacionales, 2021).

In 2021, it received 7% of visitors to the National Parks Network (Organismo Autónomo de Parques Nacionales, 2021). The following year, in 2022, the number of visitors increased again, with 1,482,625 visitors recorded.

Caldera de Taburiente National Park (La Palma)
Total area: 4,690.00 ha. In 2019 it received 3.1% of the estimated total number of visitors to the National Parks Network (Situación de la Red de Parques Nacionales, 2021). In 2021, it received 2% of visitors to the National Parks Network (Organismo Autónomo de Parques Nacionales, 2021). After the 294,948 visits recorded in 2021, in 2022, there was an annual rate of change of 21.03%, which equals 356,968 visits, some 62,000 more than in 2021.

Number of visitors to the Canary Islands National Parks
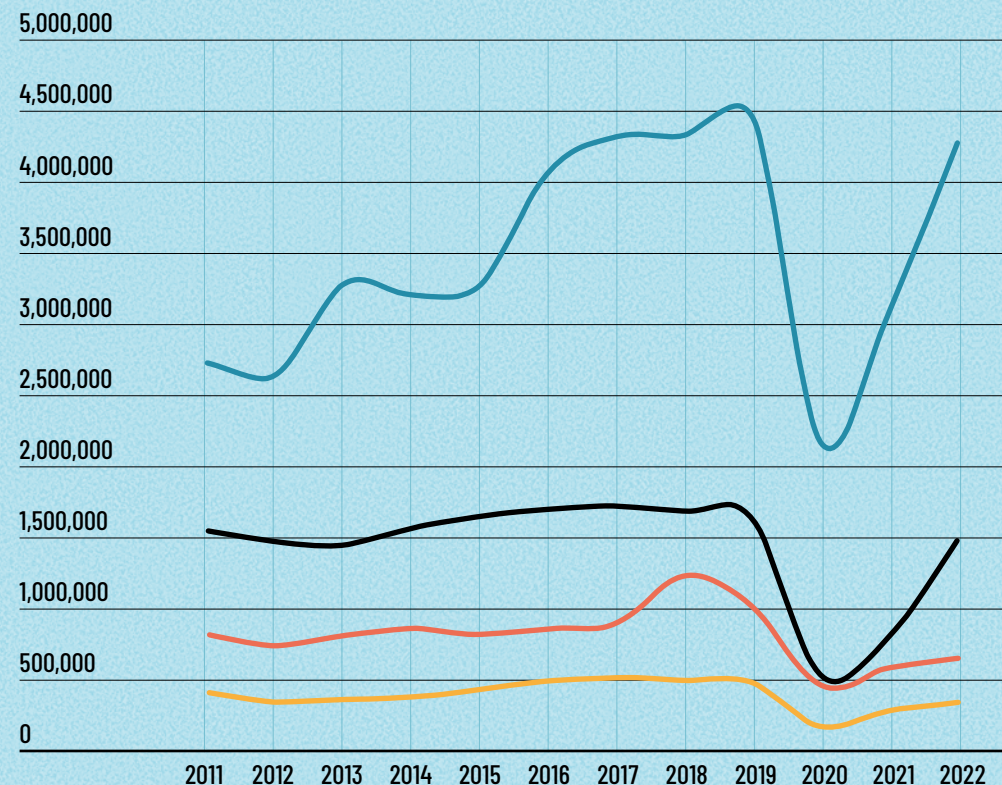
Statistics on Protected Natural Spaces (ISTAC) and Government of the Canary Islands (data for El Teide referring to 2022).

- El Teide (Tenerife)
- Timanfaya (Lanzarote)
- Garajonay (La Gomera)
- La Caldera de Taburiente (La Palma)

Natural attractions

In 2022, there was an increase in the percentage of tourists who consider the beaches, the sea and the landscapes to be very important aspects in their choice of the Canary Islands as a destination. In the case of beaches, this percentage rose to 40% of tourists who visited the islands.

Percentage of tourists who consider nature-related aspects to be very important in their choice of trip to the Canary Islands

- 2019
- 2022
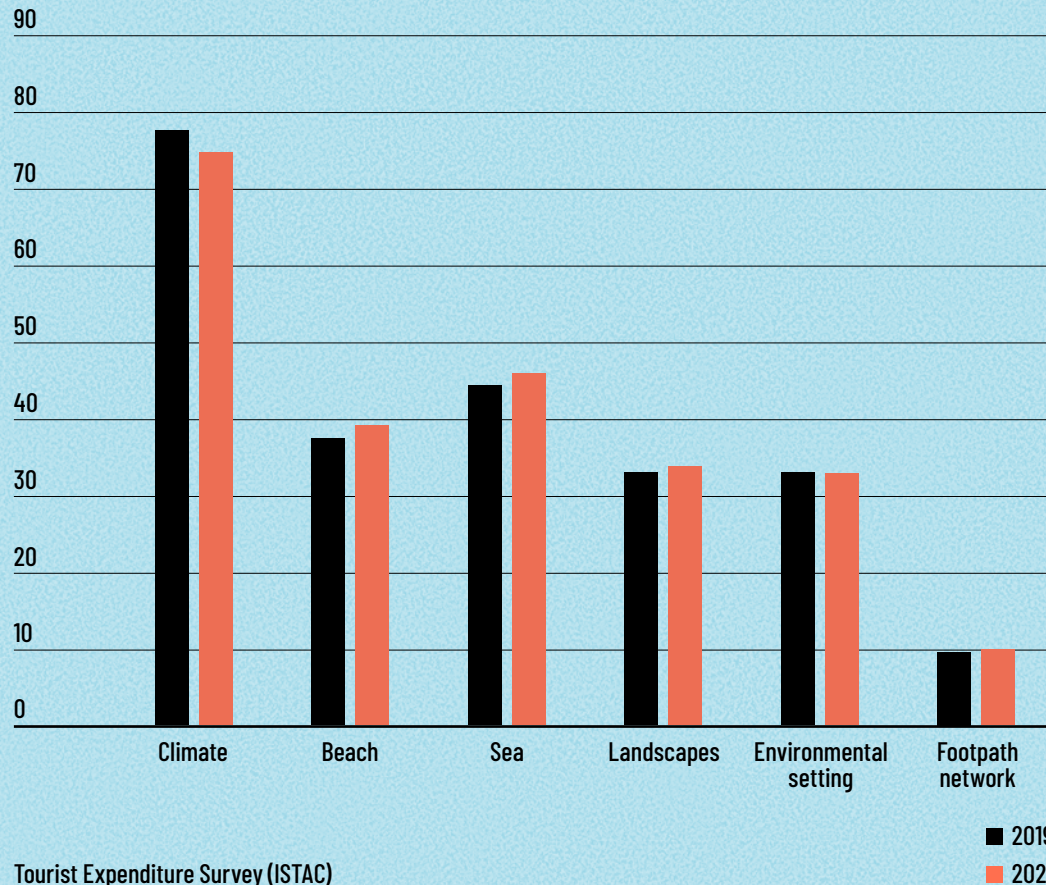
Tourist Expenditure Survey (ISTAC)
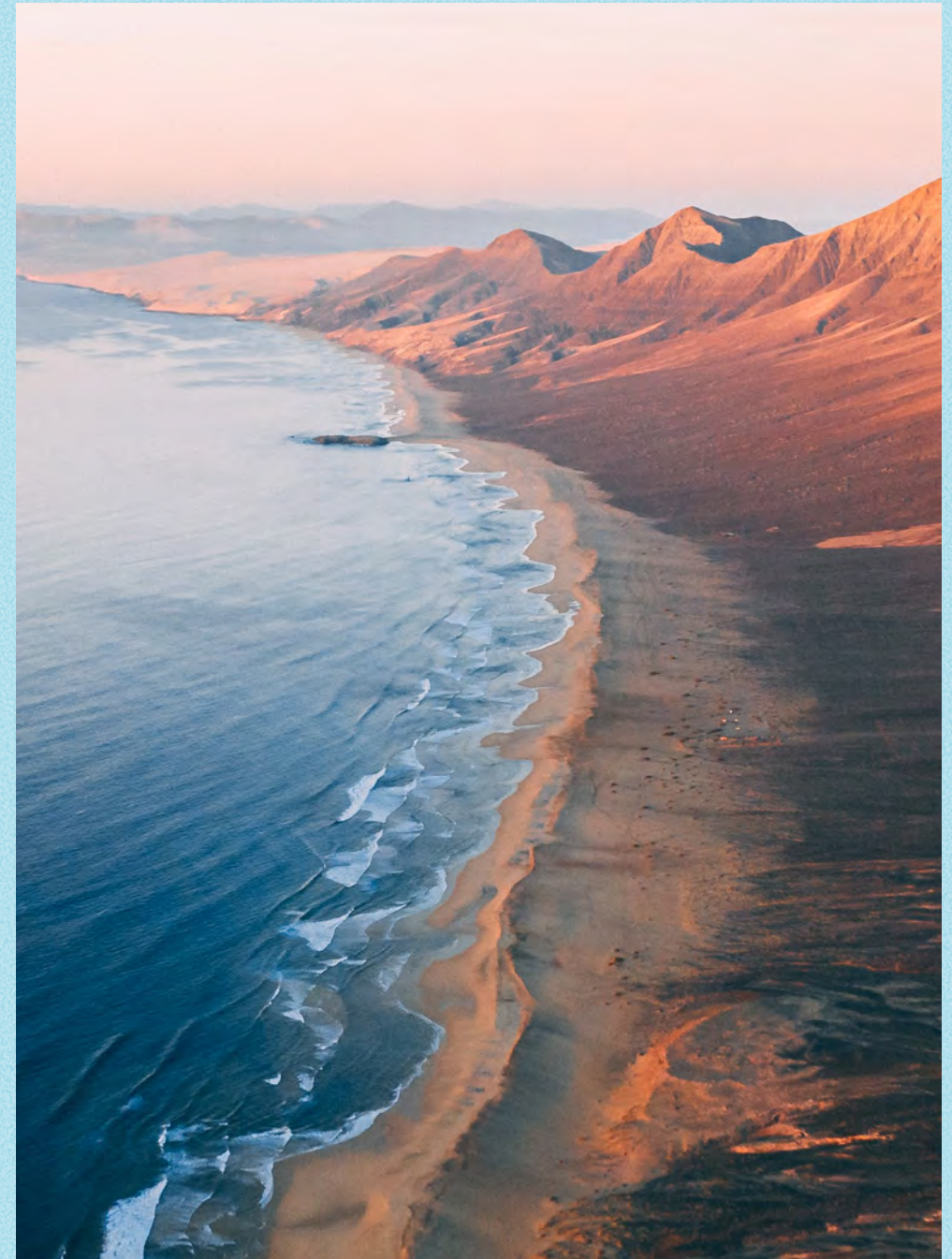
Potential impacts of tourism on nature

Nature and activity-based tourism in the Canary Islands with associated impacts on terrestrial biodiversity (grade 1–3):

Nature and activity-based tourism in the Canary Islands	A.W.	C.C.T	D.W	I.S.	D.V.	S.C.	D.L.	M.P.S.A	A.P.S.	A.C.S	N.P.	L.P.	O.P.	L.C.	I.F.H.	L.I.
Ecotourism																
Audiovisual activities in nature	1	1	1	1	1	1		1			2	2			1	1
Activities for scientific purposes and environmental education		1	2	1	1	1					2					
Birdwatching	1	1	2		1						1	1			1	
Stargazing	2	1		1	1						2	2				
Earth																
Hiking	3	1	3	2		2		2	1		1	1			1	
Shepherd's Leap	1	2	2	1	1	1		1	1		1					
Mountaineering	1	1	2	2		1		1	1			1				1
Mountain races	3	1	2	2			1	2			1	1				
Orientation	1	3	2	2	2						1					
Canicross	3	1	1	2			1		1	1	1					
Survival	3	3	3	2	3	3		2		1	1	1			2	2
Mountain biking (MTB) and cyclotourism		2	2	3	1		2		2		1	1				2
MTB downhill racing		2	2	2	1		3	1	3		1					
Motor																
Off-road routes (4x4)	1	2	3	2	2		3		3	1	3	2	2			3
Enduro, motocross and trial		2	3	2	2		3	1	3	1	3	1	2			3
Quad biking routes		3	2	2	2		3		3	1	3	1	1			3
Rallies	3	2	2	3	3		3		3	2	3	2	2			3
Buggy routes	1	3	2	3	2		3		3	1	3	1	1			3
Vertical																
Climbing	1		2	1	2	1		2			1	1				2
Via ferrata	1		2	2	2	1		2			1	1				
Canyoning	2	1	2	2	2			1			2				3	
Caving	2	3	3	2	1	1		2	2	3	1	3	1		2	
Puenting and rope jumping	1		1								2					
Air																
Delta Wing		2	2	1	1		1	2			1					2
Skydiving and base jumping		1	2	2	1		1		1		1					
Paragliding		2	2	1	1		1	2			1					
Paramotor		2	2	1	1		3	2			3			1		
Ultralight				1							1			1		

CONDITIONS IN NATURE

Source: Author prepared based on Rodríguez Luengo, J.L. (Coord.) (2022). See legend in next table.

Outdoor activities and associated conditions:

Active tourism and nature activities in the Canary Islands	CONDITIONS IN NATURE															
	A.W.	C.C.T.	D.W.	I.S.	D.V.	S.C.	D.L.	M.P.S.A	A.P.S.	A.C.S.	N.P.	L.P.	O.P.	L.C.	I.F.H.	L.I.
Leisure and Recreation																
Camping	3	1	3	1	2	3		3		1	2	2				1
Caravaning	3	1	1	1	1	2	1	2	1	2	1	2				1
Pigeon Fancying			2	3						1						
Horse and camel or dromedary rides	2	1		2	2		1		2	1						1
Uses of natural pools and puddles	3	1	3	1	2	1		2			1					
Mushroom picking	1	3	1	1	2	3		1	1	1	1					
Thematic routes	1	1	1	1		1		1	1		3	1				
Zip line		1	2		1					1	1					
Slackline		1	2	1	1			1			1					3
Clay pigeon shooting	3		3		1					3	3		2	3		
Archery	2	2	1		2						1					3
Paintball and airsoft	2	2	1	1	2		1	1		2	1		2			
Yoga, meditation and similar activities		1	1	1	1			2								
Drone flights		1	2	1			1				2					
Walking with dogs	3	1	3	2	1	2	1	2			1					
Picnic	3	1	3	1	2	3		2			1					
Resource use																
Hunting	3	3	3	3	3	1		1	1	2				3		
Recreational shore-based fishing	3	2	2		2	2		2		1		1		1	2	
Shellfishing	1	3	3		2	3		3								

List of conditions associated with active and nature-based tourism activities:

A.W.	Abandonment of waste	M.P.S.A.	Movement, piling, subtraction or alteration of geological features
C.C.T.	Collision, crushing, trampling	A.P.S	Alteration of the physical characteristics of the soil
D.W.	Disturbance to wildlife	A.C.S.	Alteration of the chemical characteristics of the soil
I.S.	Introduction and/or spread of alien and/or native species	N.P.	Noise pollution
D.V.	Damage to vegetation	L.P.	Light pollution
L.I.	Landscape impact	O.P.	Oil pollution
S.C.	Specimen collection	L.C.	Lead contamination
D.L.	Dust lifting	I.F.H.	Impacts on freshwater habitats

Source: Own elaboration based on Rodríguez Luengo, J.L. (Coord.) (2022).

Geoparks

El Hierro Geopark together with Lanzarote and Archipelago Chinijo Geopark are part of the European Geoparks Network and the UNESCO Global Geoparks Network.

Geoparks in the Canary Islands:

Recorded forest fires

The most recent data correspond to data published by the National Forest Fire Information Coordination Centre (2023), with provisional data up to 10/09/2023.

The number of fires in the Canary Islands during 2023 (up to September) was 0.54% of the total recorded in Spain. However, the wooded area affected accounted for 37.4% of the total wooded area affected by fires in the country during this period. The affected forest area accounts for 18.8% of the total forest area affected by fires in Spain.

In the Canary Islands, specifically in La Palma and Tenerife, during the summer of 2023, there were two forest fires (FI) with catastrophic and unknown characteristics. These were linked to heat waves of unprecedented intensity.

Exposure to the risk of new fires in the Canary Islands will continue to increase as a consequence of rising temperatures caused by climate change.

La Palma forest fire of 2023 affected about 3,300 hectares of land, equivalent to 4.6% of the total area of the island. Compared to the fires since 2000, this one is in fourth place according to damaged surface area, only surpassed by the forest fires of 2016 (Cabildo de La Palma, 2016), 2000 and 2009, respectively, whose data show the aggregate number of hectares affected by forest fires during the whole year (ISTAC, 2023).

As for the Tenerife fire of 2023, it affected some 14,700 hectares (7.25% of the total area of the island), making it one of the most devastating fires in recent decades. So far, 2007 continues to be the year with the largest aggregate area affected by forest fires on the island, with 16,886 hectares, according to ISTAC data.

Forest fires on La Palma and Tenerife in 2023
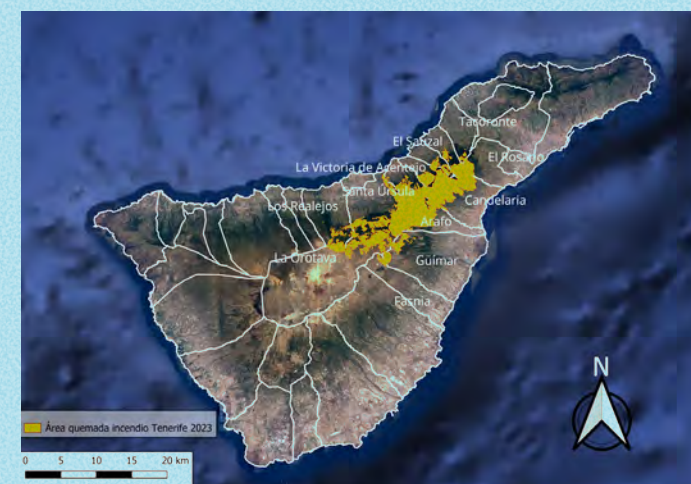
Protected Natural Spaces of the Canary Islands

Legend:
- **National Park** (orange)
- **Natural Monument** (blue)
- **Protected Landscape** (brown)
- **Natural Park** (red)
- **Rural Park** (black)
- **Special Nature Reserve** (light green)
- **Integral Nature Reserve** (dark green)
- **Site of Scientific Interest** (white)
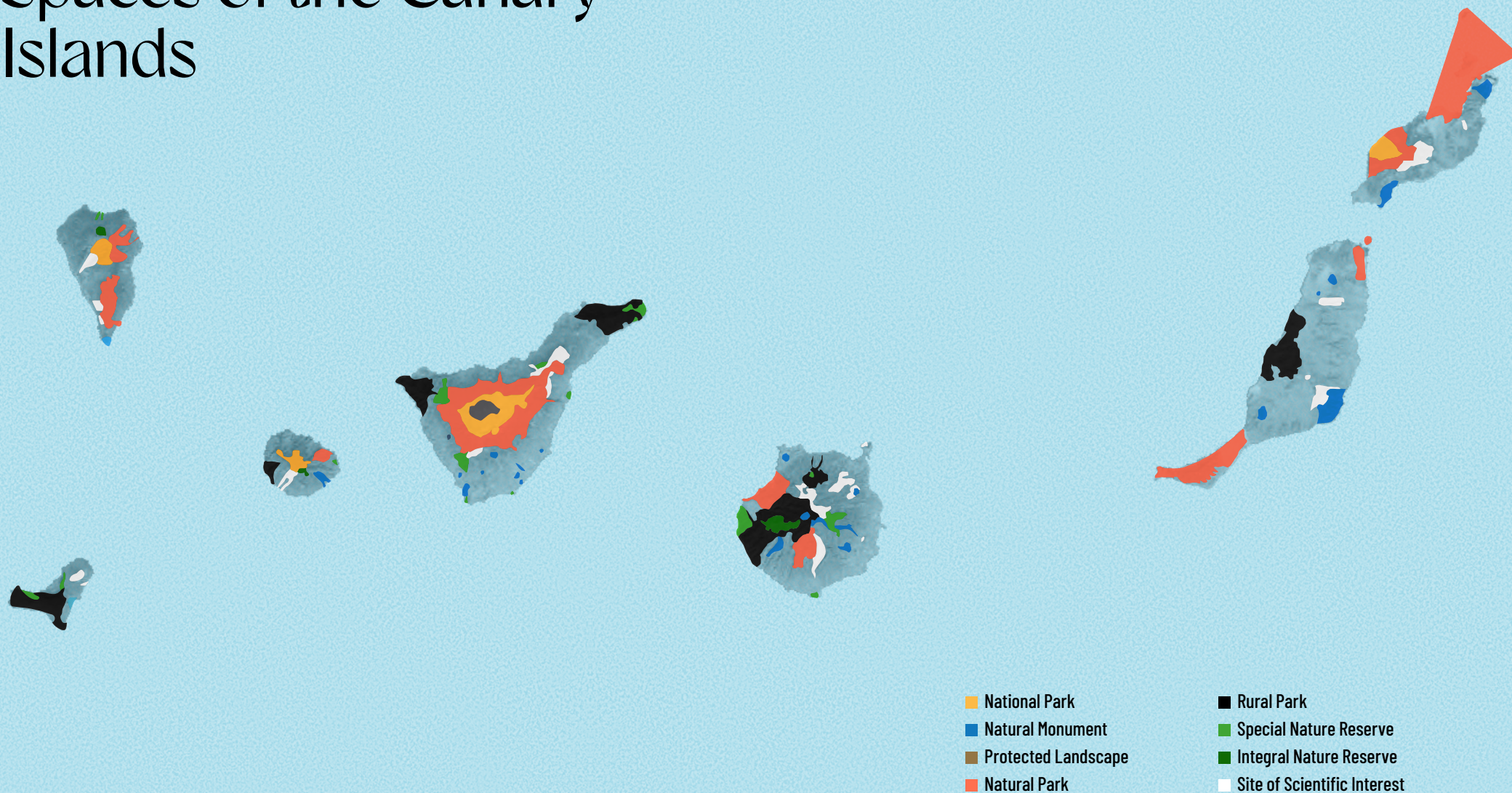
Source: GRAFCAN (2023). Canary Islands Network of Protected Natural Spaces. Territorial Information System of the Canary Islands - IDECanarias

Checklist of main indicators of issue area 10: Natural capital supporting tourism. Protected areas and fragile ecosystems

Indicator	Description	Availability	Source	Remarks
Percentage of protected territory with a high degree of conservation (Natura 2000 criterion).	The Natura 2000 network has a uniform scale for assessing the conservation status of all European protected sites belonging to it.	Available	Government of the Canary Islands	It allows comparisons between territories.
Number and percentage of tourism flagship species (birds, marine mammals, reptiles) that are threatened.	Flagship species are those that attract visitors.	Available	Government of the Canary Islands	Once nature tourism experts provide the list of the most relevant ones, the conservation experts will provide their conservation status.
Visits to and appreciation of protected natural areas by tourists		Not available		
Residents' assessment of the influence of tourism on natural resources and protected areas		Not available		
Percentage of protected areas with effective management (leadership, staff and annual plan evaluation).	The quality of management is fundamental for the conservation and enhancement of protected natural areas.	Partially available	Government of the Canary Islands	This requires management staff and ex-post evaluated plans.
Number and area of managed land and marine areas subject to planning.	There are many more natural habitats and landscapes relevant to tourism than those protected by law.	Available	Government of the Canary Islands	Areas not protected by the EU can also be conserved through social stewardship schemes that are emerging in Europe and the Canary Islands.
Indicators of the activity of companies offering activities in nature.		Partially available		Identify awards and codes of good practice by each company.
Air quality index		Available		

Climate change and mitigation

4.11

Islands and outermost regions are particularly vulnerable to climate change according to the New EU Strategy on Adaptation to Climate Change (COM (2021) 82 final).

The Canary Islands are one of the Spanish regions most vulnerable to climate change, mainly due to their geographical location, external dependence and the importance of tourism in their economy.

Coastal areas and the reduction of thermal comfort are among the impacts directly related to tourism in the Canary Islands (Dorta and Correa, 2023).

There is a need for data that allows for a regular calculation of the carbon footprint per non-resident tourist, indicators on tourism and climate action as well as regular reports on the perceptions of the local population.

In recent years, various reports and research papers have presented projections and simulations of climate change and its impacts on the islands during this century.

The impacts affect rainfall and droughts, forest fires, biodiversity and beaches.

In the framework of the European project SOCLIMPACT, an innovation project coordinated by the ULPGC and made up of 24 partners from 12 European islands, the "Regional Exchange Information System (REIS)" platform has been created for the islands of the European Union. This platform allows interested agents to access knowledge generated by a panel of experts in climate change as well as to carry out consultations or propose studies.

Carrillo et al. (2022) carried out an analysis of climate variations and future conditions for tourism in the Canary Islands taking into account the scenarios RCP 4.5 (medium emissions scenario with mitigation and peak emissions in 2040) and RCP 8.5 (high emissions scenario, without mitigation). Overall, climate projections indicate improved conditions for tourism in winter and worsening conditions in summer due to reduced thermal comfort. According to this study, the south-eastern and south-western parts of the islands will experience worsening conditions for tourism in summer and autumn.

The impacts of climate change will be uneven across the territory due to its orography (Carrillo et al., 2022).

In a study carried out in Tenerife, 54% of those surveyed considered that local corporations have done little or nothing with respect to climate change; the same opinion was held by 44% for the Island Council (Cabildo); 49% for the Government of the Canary Islands; and 48% for the Government of Spain (Correa et al., 2023). The incorporation of the Canary Islands into the European Union Emissions Trading System from 1 January 2024, together with the paraffin tax and the obligation to use a percentage of sustainable aviation fuels (SAF) will mean an increase in international air transport prices, which will not apply to competing destinations outside the EU. In any case, the production of sustainable fuels may also be an opportunity to be explored on islands.

Estimates of the impact of climate change on GDP

According to a study on the impacts of climate change on southern European islands in 2050 in the RCP 2.6 scenario (low emissions scenario), the Canary Islands have the highest GDP losses, approximately 3.8% in the GINFORS model. In the RCP 8.5 scenario (high emissions scenario), the estimated losses are approximately 6% (Vrontisi et al., 2022).

Estimating the impact of climate change on the GDP of Southern European islands 2050.
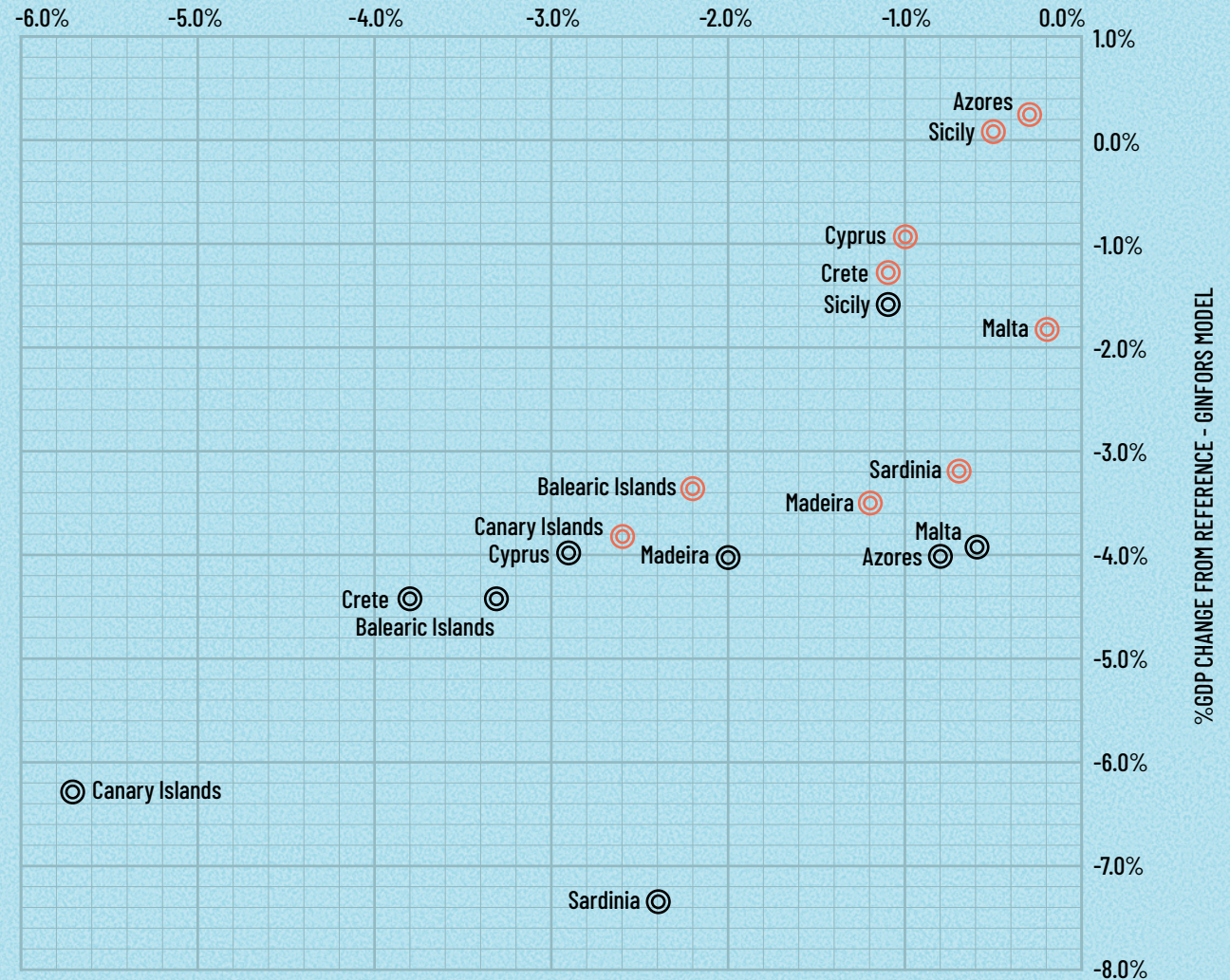
Source: Vrontisi et al., (2022)

◎ RCP8.5   ◎ RCP2.6

Carbon footprint of tourism in the Canary Islands

The carbon footprint of the tourism sector amounts to 9,171,062 t of CO_2 equivalent in 2019. International and mainland Spain air transport accounts for 77.5% of the total carbon footprint, according to the Government of the Canary Islands.

Distribution of the carbon footprint of the tourism sector, 2019

4%
Cruise tourism

5%
General expenses

8%
Hotel and extra-hotel accommodation

5%
Expenditure on local transport

78%
International air transport and with mainland Spain
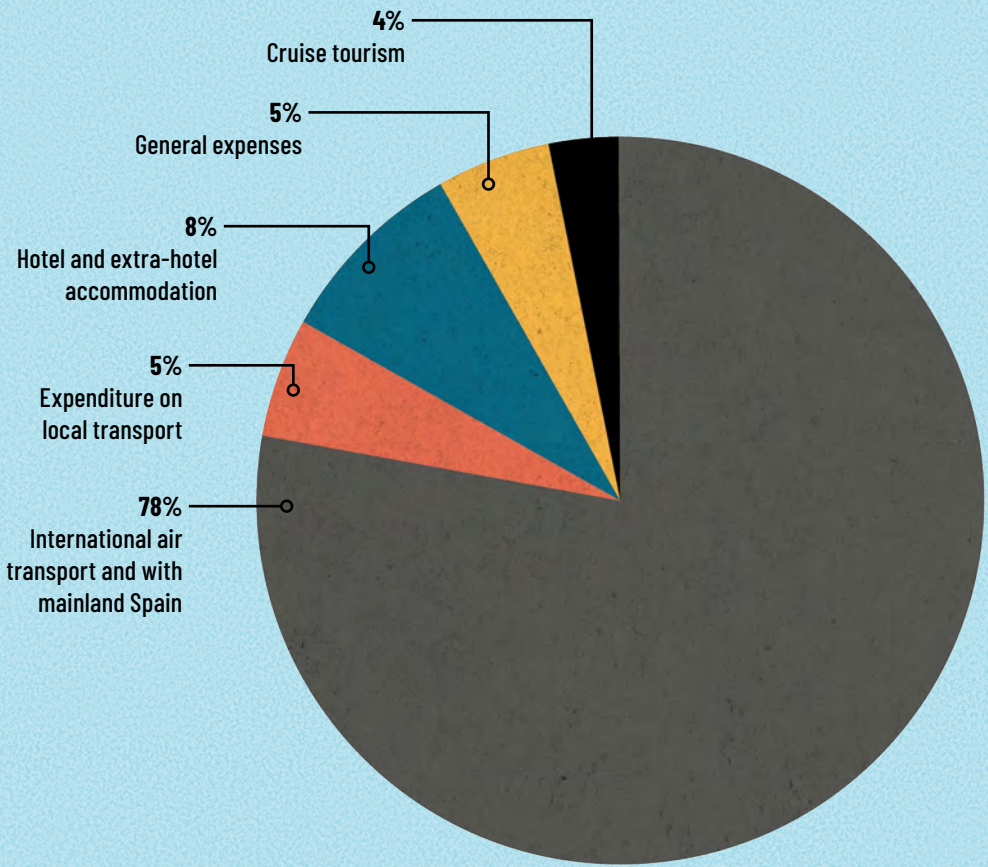
Source: Carbon footprint of the tourism sector. Government of the Canary Islands (2021)

Air transport emissions estimates

In 2022, according to estimates by Tourism of the Canary Islands (Pro–motur), aviation in the islands generated 5.4 million tonnes of CO_2. Over the last few years the amount of emissions per seat km has decreased slightly, from 54g per seat and km in 2018, to 51.63g in 2023.

Aviation emissions in the Canary Islands (million metric tonnes)

Year	Value
2018	5.51
2019	5.3
2020	2.68
2021	3.22
2022	5.4
2023	5.64
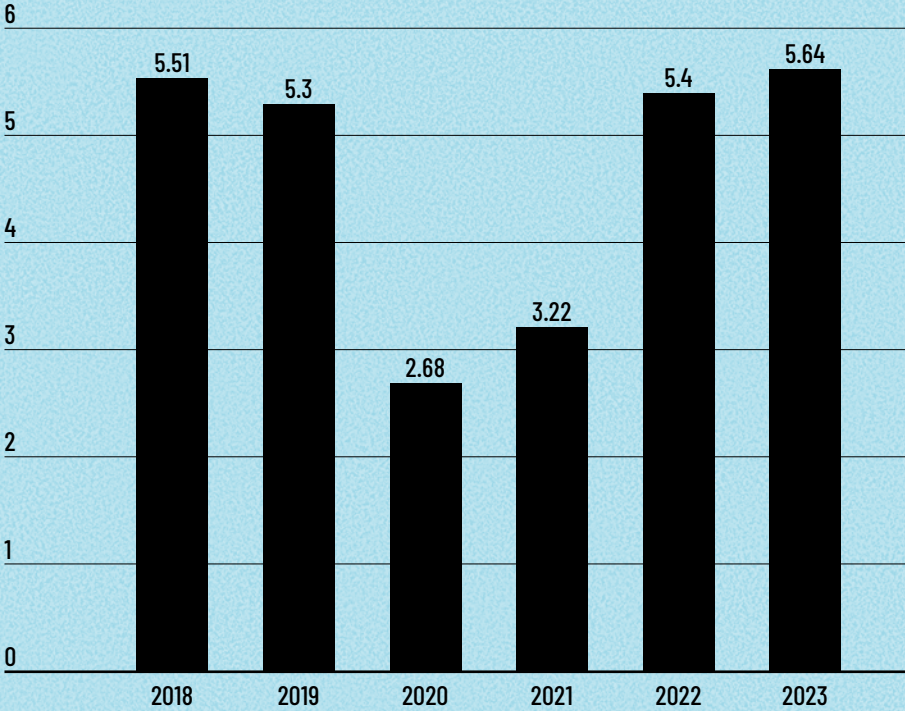
Source: Promotur (2023)

CO2 emissions per seat and km (g)

Year	Value
2018	54.14
2019	54.09
2020	54.02
2021	53.66
2022	52.2
2023	51.63
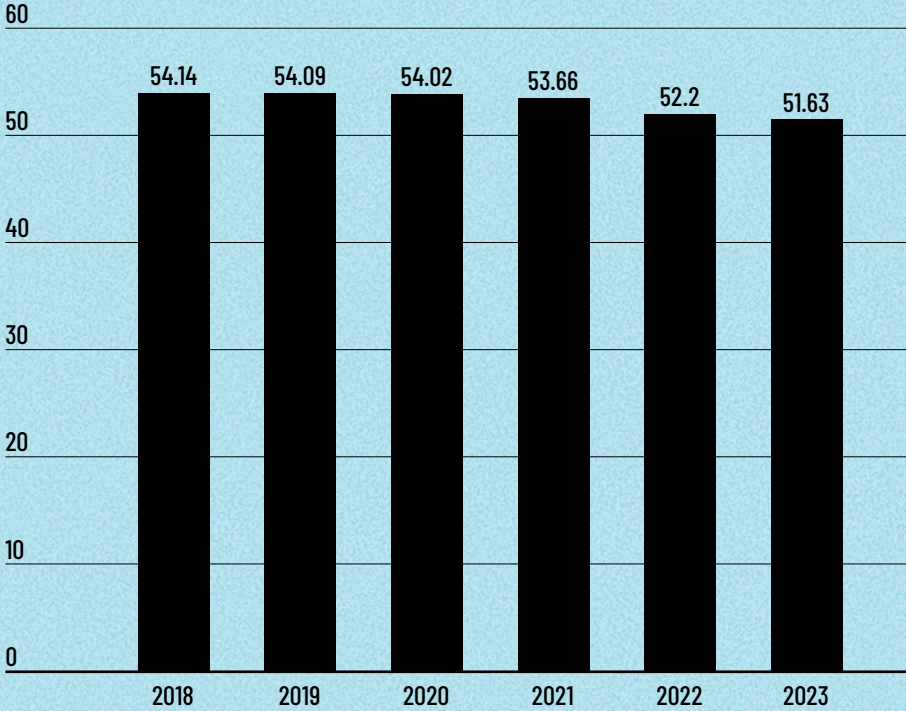
Source: Promotur (2023)

The carbon footprint per non-resident tourist in 2019 is 0.789 tCO_2 -eq/non-resident tourist. International and mainland Spain air transport is the main category of activity, with 0.470 tCO_2 -eq/non-resident tourist (Government of the Canary Islands, 2021). Gran Canaria is the island with the highest emissions per non-resident tourist, followed by La Gomera.

In 2019, ratios of 0.009 tCO_2-eq/traveller entered*day in hotel establishments in the Canary Islands and 0.004 $tCO2_2$-eq/traveller entered*day in non-hotel establishments in the Canary Islands have been estimated (Government of the Canary Islands, 2021).
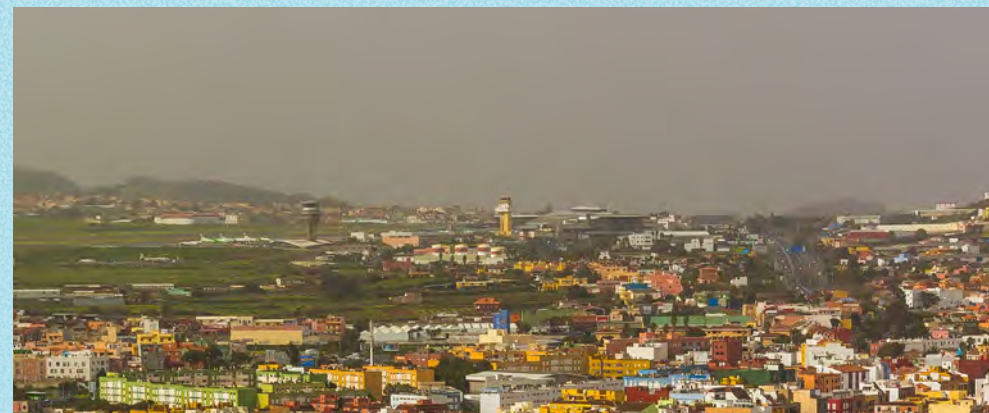
Carbon footprint per non-resident tourist in 2019

Legend:
- Cruise tourism
- General expenses
- Accommodation
- Local transport expenditure
- International and mainland Spain air transport
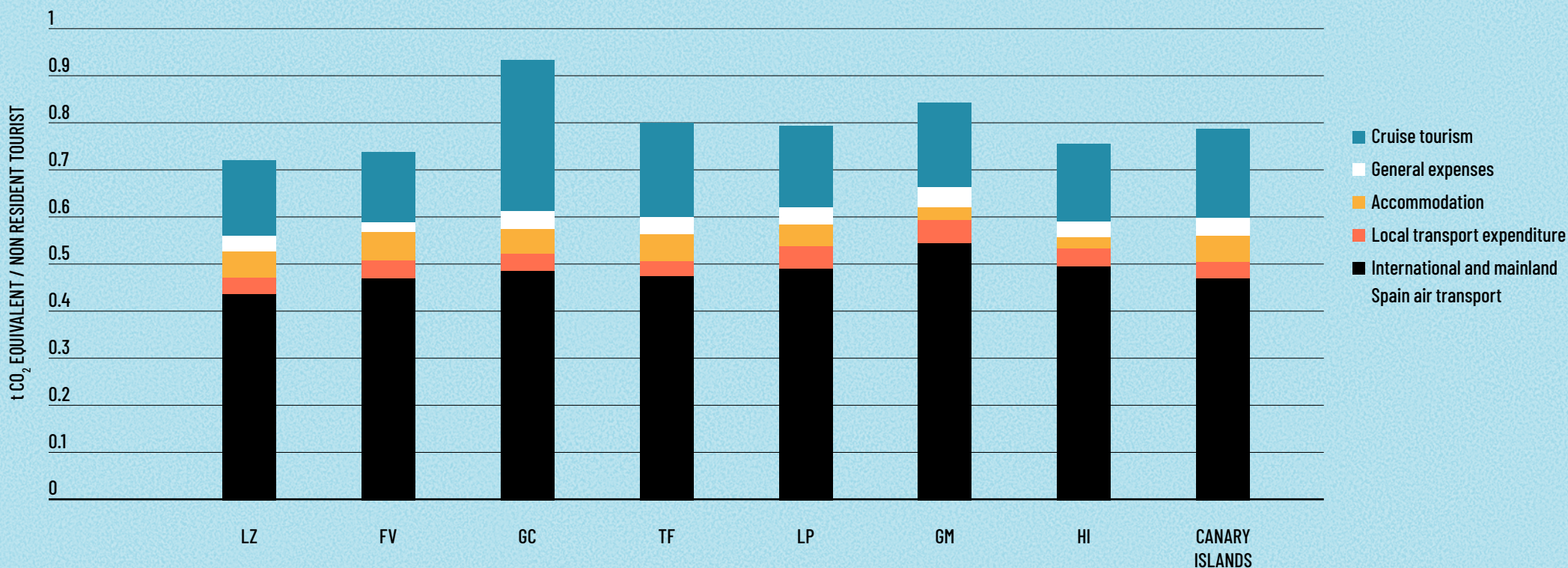
Source: Carbon footprint of the tourism sector. Government of the Canary Islands (2021)

Estimates of greenhouse gas (GHG) emissions in the Canary Islands

Total greenhouse gas emissions: In 2020, 11,365.53 Gg CO_2-eq (–17.2% compared to 2019). The most significant decrease was in thermal power plants and transport (–18.9%) (Anuario energético de Canarias, 2021). In total, 87.2% of emissions in 2020 belong to thermal power plants and transport (Anuario energético de Canarias, 2021).

Greenhouse gas emissions per capita: 5.22 tCO_2-eq / inhabitant in 2020 (Anuario energético de Canarias, 2021).

Percentage distribution, by category, of GHG emissions in the Canary Islands (2020)

3%
Industrial processes

2%
Agriculture

8%
Waste tratment and disposal

87%
Energy processing
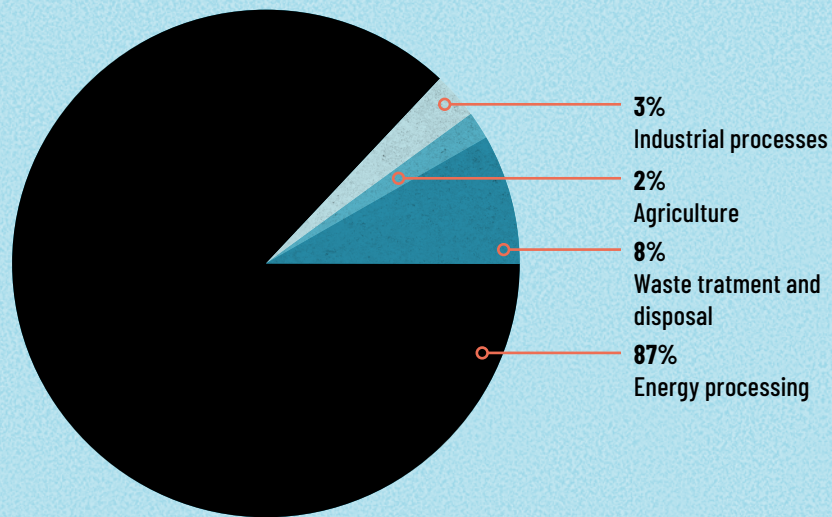
Source: Canary Islands Energy Yearbook (2021)

Evolution of greenhouse gas emissions in the Canary Islands

Gg CO₂-eq
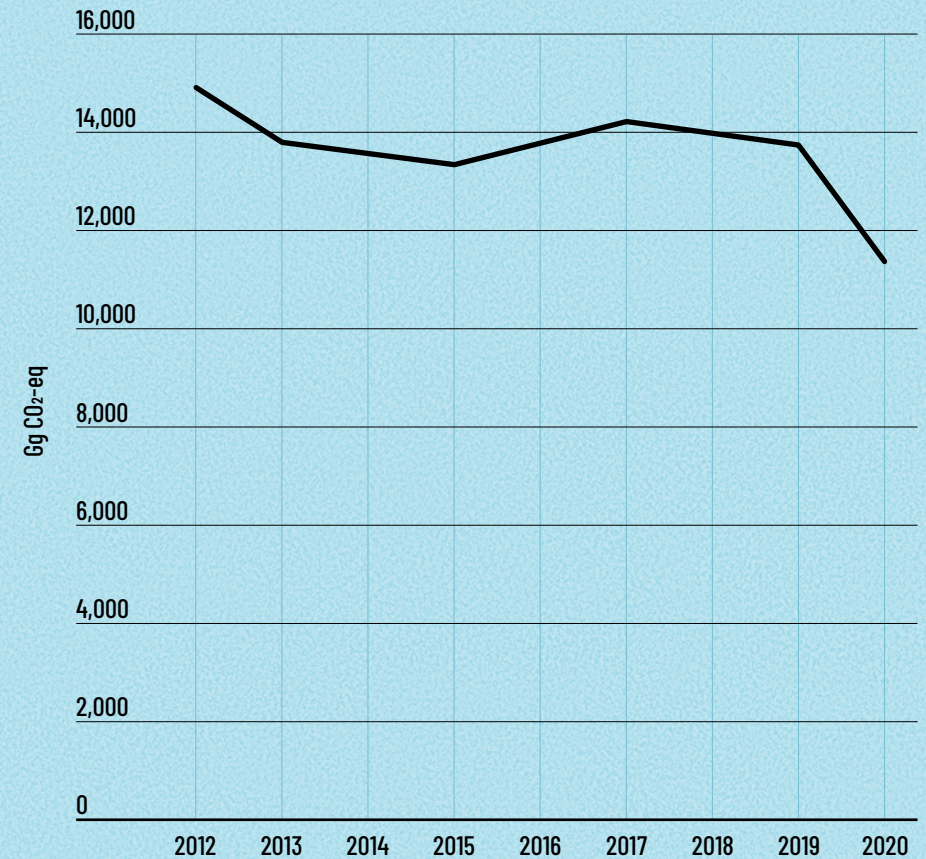
Source: Canary Islands Energy Yearbook (2021)

Air quality

Air quality: Air quality index, measured from data on pollutants at stations in the Canary Islands Air Quality Control and Monitoring Network. The main pollutant is PM10 (63.23% of the total). These are particles that can have a diverse emission source (e.g. road traffic; domestic and residential emissions; mineral dust of African origin, etc.). Overall, air quality in the Canary Islands in 2022 was reasonably good (63%).

Air quality in the Canary Islands in 2022

9% Unfavourable

2% Extremely unfavourable

18% Good

6% Regular

2% Very unfavourable

63% Reasonably good
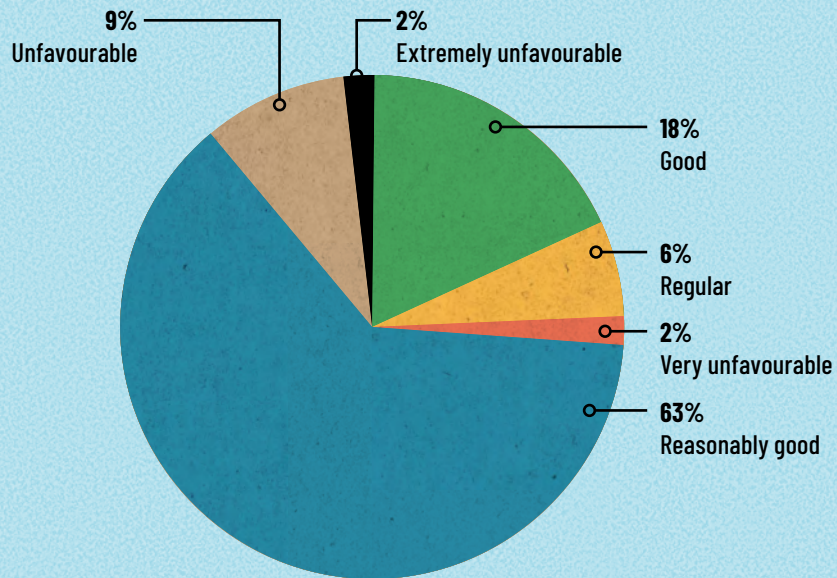
Source: Índice Nacional de Calidad del Aire (ICA), Ministry for Ecological Transition and Demographic Challenge. Taken from Dataestur
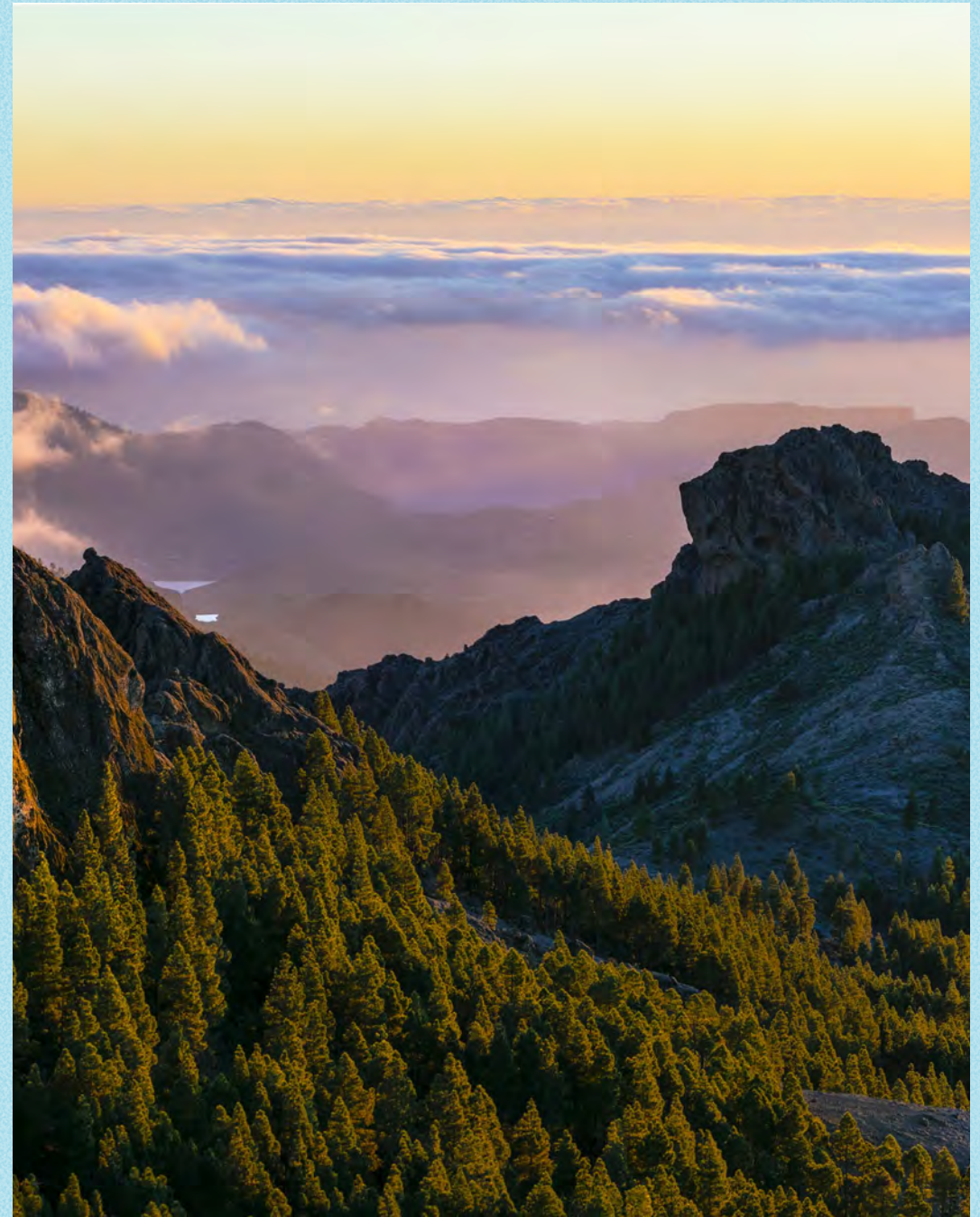
Predisposition towards carbon footprint reduction

64.8% of tourists are willing to spend more on their trip to reduce their carbon footprint (ISTAC, 2022). This figure is particularly noteworthy among surfing tourists on the islands; 75% agree with this statement (Promotur, based on the Encuesta Sobre Gasto Turístico, 2022).

Tourists in the Canary Islands in relation to the extra expenditure they are willing to spend to reduce their carbon footprint.
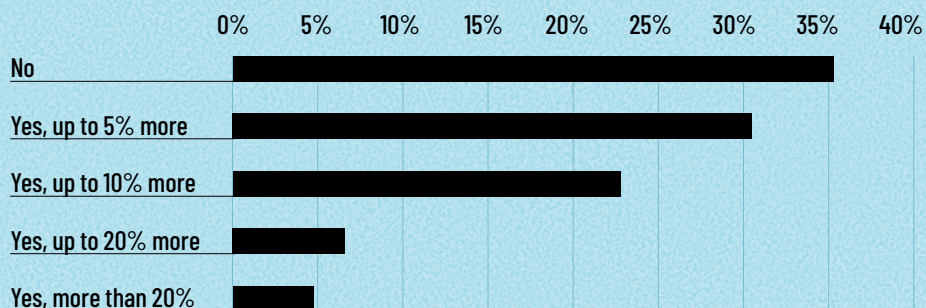
Source: Tourism expenditure survey (ISTAC)

Percentage of tourists in the Canary Islands who are willing to spend extra to reduce their carbon footprint, according to activities in destination (2022)

Legend: No | Yes, up to 5% more | Yes, up to 10% more | Yes, up to 20% more | Yes, more than 20%
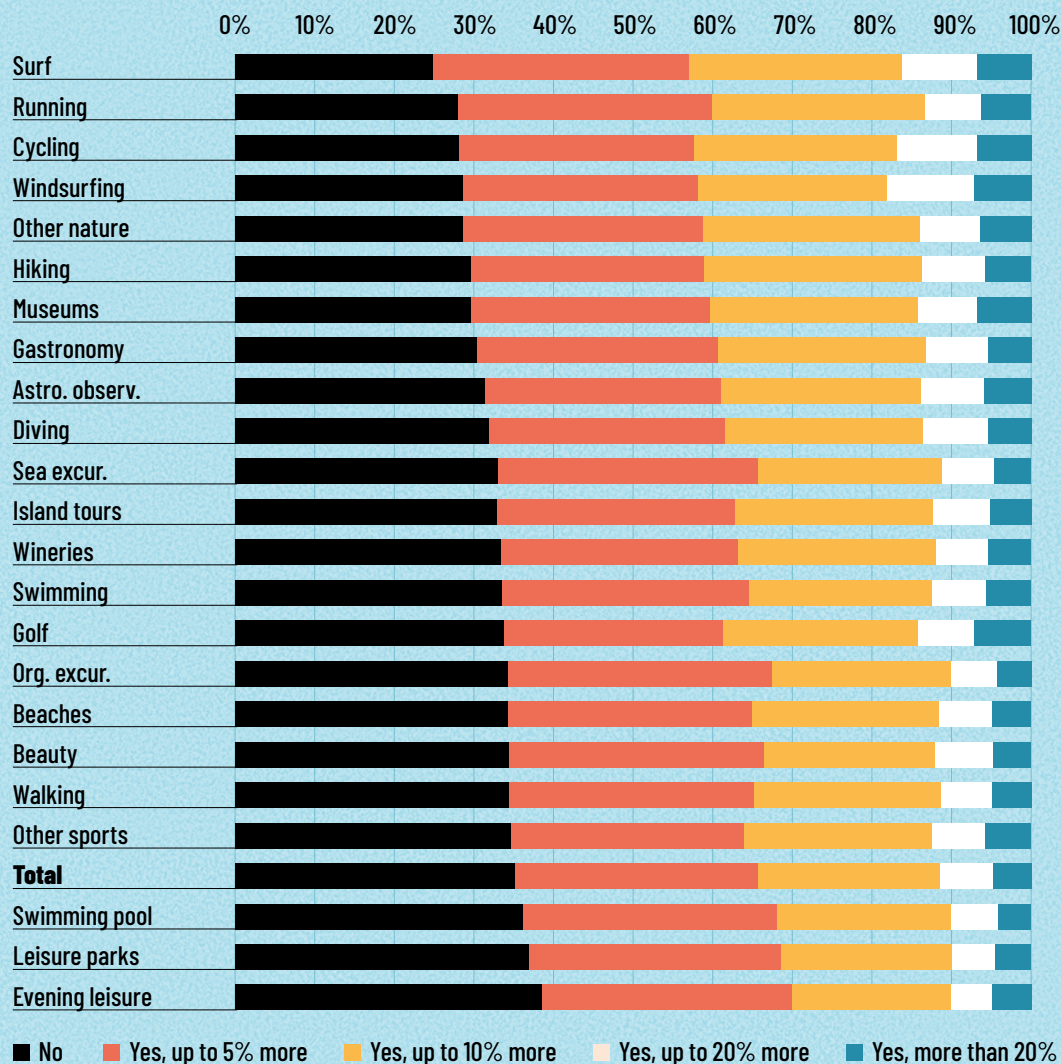
Source: Promotur, based on Encuesta sobre Gasto Turístico (ISTAC)

Checklist of main indicators of issue area II: Climate change and mitigation

Indicator	Description	Availability	Source	Remarks
Total greenhouse gas emissions	Tonnes of CO_2 equivalent of total gasses	Partially available	Anuario energético de Canarias. Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias.	There is a need for regular data on greenhouse gas emissions from activities characteristic of tourism.
Carbon footprint per tourist and per tourist activity		Occasional data	Gobierno de Canarias	
Climate change risk (particularly in areas sensitive to tourism activity)		Available	PIMA Adapta Costa / GOTA ULL	
Greenhouse gas emissions per capita	Tonnes of CO_2 equivalent of total gasses / Population	Partially available	Anuario energético de Canarias. Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias.	
Share of greenhouse gas emissions by economic sector	Tonnes of CO_2 equivalent emissions by economic sector / Total greenhouse gas emissions	Partially available	Anuario energético de Canarias. Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias.	

Local satisfaction with tourism and local well-being

The only official data available on the satisfaction of the local population with tourism, from 2019, reflect a high level of satisfaction among the Canarian population. 80.1% of those surveyed agree with the statement, "The development of tourism has been very beneficial for the island and its inhabitants" (ISTAC, 2019). In terms of a detailed analysis by islands and regions, the percentage of disagreement with this statement is higher in La Palma (17.2%), as well as in Gran Canaria–South (13.0%) and Lanzarote (12.8%). 83.2% of those surveyed agreed with the statement, "Tourism should continue to be promoted as one of the main driving forces of the island's economy". Disagreement with this statement is higher in the Metropolitan Area of Tenerife (13.6%) and in Gran Canaria–North (11.3%) (ISTAC, 2019).

However, the results of a recent study addressing changes in the perception of tourism by Tenerife residents after the COVID-19 pandemic (Rodríguez Darias and Díaz Rodríguez, 2023) point in the opposite direction.

There is a need for official data and regular research to monitor residents' satisfaction with tourism activity as well as the population's perception of the impacts of tourism, as there is insufficient current data to provide information.

Opinion of the resident population regarding the statement, "The development of tourism has been very beneficial for the island and its inhabitants" (%). 2019
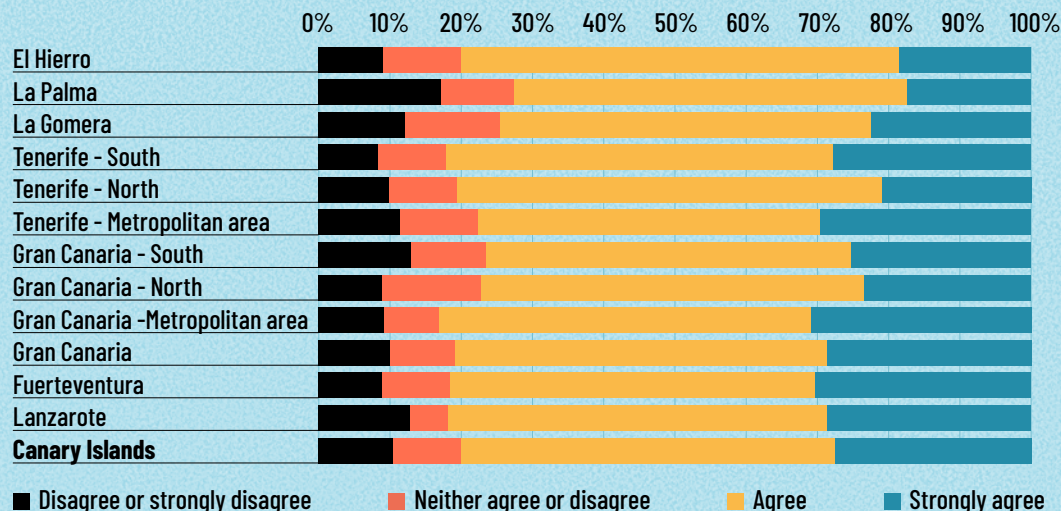
- Disagree or strongly disagree
- Neither agree or disagree
- Agree
- Strongly agree

Note: To obtain the percentages, the option "Don't know/No answer" has been eliminated from the total
Source: Socio-economic Habits and Confidence Survey - ECOSOC (ISTAC)

Opinion of the resident population regarding the statement, "Tourism should continue to be promoted as one of the main driving forces of the island's economy" (%). 2019
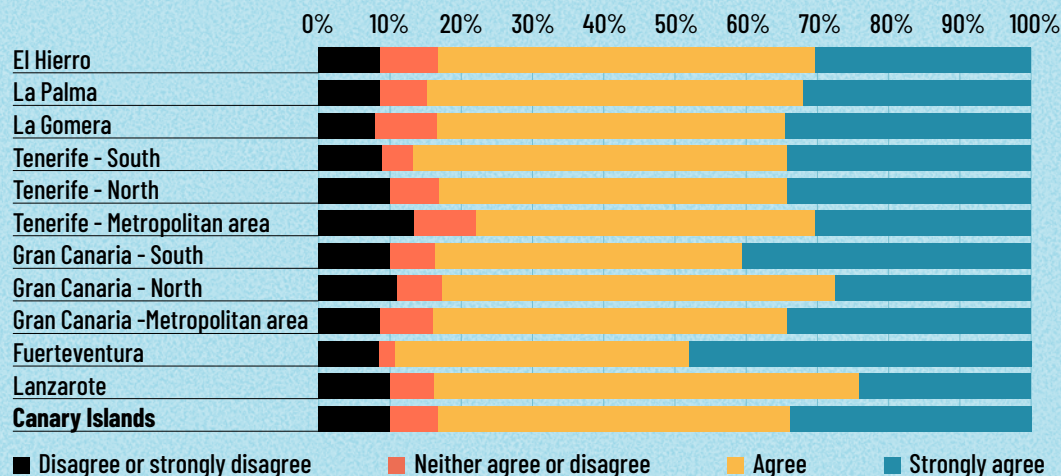
- Disagree or strongly disagree
- Neither agree or disagree
- Agree
- Strongly agree

Note: To obtain the percentages, the option "Don't know/No answer" has been eliminated from the total
Source: Socio-economic Habits and Confidence Survey - ECOSOC (ISTAC)

People's perceptions of holiday homes. 2019

The holiday home module of the Survey of Socioeconomic Habits and Confidence – ECOSOC (ISTAC, 2019) provides information on the opinion of the local population regarding holiday homes. The positive economic impacts of this activity are perceived to a greater extent in El Hierro and La Palma, while in Fuerteventura the negative social impacts, such as those related to housing, are more accentuated.

Opinion of the local population regarding the statement on holiday homes, "This type of accommodation is more sustainable than traditional accommodation" (Scale 1 to 5). 2019.

La Gomera	
El Hierro	
La Palma	
Tenerife - North	
Gran Canaria - Metropolitan area	
Tenerife - Metropolitan area	
Gran Canaria-South	
Canarias	
Gran Canaria - North	
Lanzarote	
Tenerife - South	
Fuerteventura	

Source: Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC)

Opinion of the local population regarding the statement on holiday homes, "Holiday homes economically revitalises the area where the accommodation is located" (Scale 1 to 5). 2019.
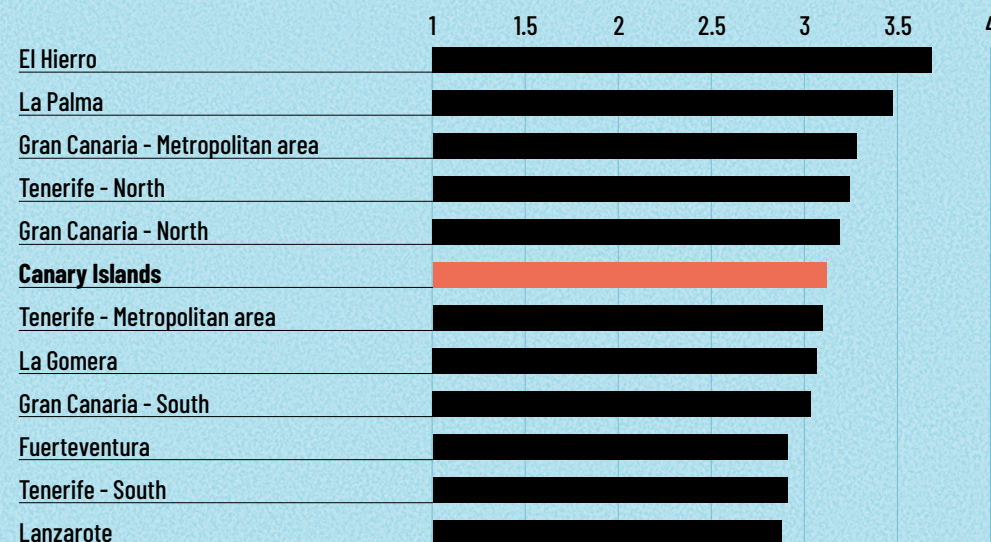
El Hierro	
La Palma	
Gran Canaria - Metropolitan area	
Tenerife - North	
Gran Canaria - North	
Canary Islands	
Tenerife - Metropolitan area	
La Gomera	
Gran Canaria - South	
Fuerteventura	
Tenerife - South	
Lanzarote	

Source: Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC)

Opinion of the local population regarding the statement on holiday homes, "Renting private homes to tourists ends up pushing the usual resident out of the neighbourhood" (Scale 1 to 5). 2019.

	Value
Fuerteventura	
Lanzarote	
La Gomera	
Gran Canaria-South	
Gran Canaria - North	
Tenerife - South	
Canarias	
Tenerife - Metropolitan area	
Gran Canaria - Metropolitan area	
La Palma	
Tenerife - North	
El Hierro	

Source: Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC)

Opinion of the local population regarding the statement on holiday homes, "Holiday homes spread the benefits of tourism more evenly across society" (Scale 1 to 5). 2019.

	Value
El Hierro	
La Palma	
Tenerife - Metropolitan area	
Tenerife - North	
La Gomera	
Gran Canaria - Metropolitan area	
Fuerteventura	
Canarias	
Gran Canaria - North	
Gran Canaria - South	
Tenerife - South	
Lanzarote	
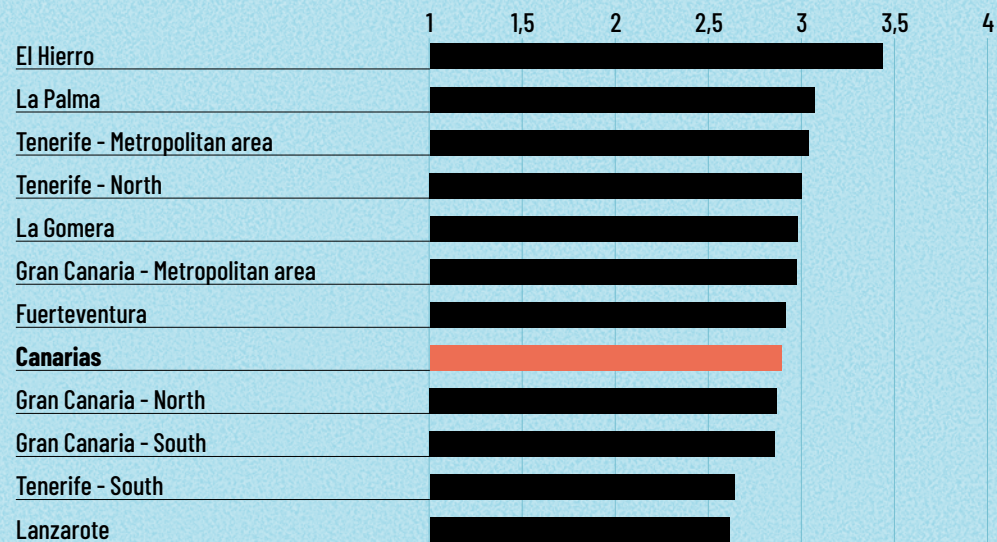
Source: Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC)

Quality of the urban environment

The Survey of Essential Population and Housing Characteristics (INE, 2023) provides data on the percentage of primary dwellings suffering from nuisance related to tourist activities or hospitality activities in 2021. In the Canary Islands, 7% of primary dwellings are affected by this situation (6% in municipalities with 50,000 inhabitants or less and 7% in municipalities with a larger population); in Spain the percentage is 9% (6% in municipalities with 50,000 inhabitants or less; 11% in municipalities with more than 50,000 inhabitants) (INE, 2023).

In tourist municipalities, these annoyances effect more households; 12% of households are annoyed by these activities in the case of Arona and 11% in San Bartolomé de Tirajana. However, there are no notable differences in these municipalities with respect to other types of environmental conditions such as cleanliness, noise or pollution.

Percentage of dwellings affected by nuisance related to tourist activities or hospitality venues in municipalities with more than 50,000 inhabitants (2021)

Source: Survey of Essential Population and Housing Characteristics (INE).

Percentage of dwellings affected by outdoor noise in municipalities with more than 50,000 inhabitants (2021)

Source: Survey of Essential Population and Housing Characteristics (INE).

Percentage of households affected by poor street cleaning in municipalities with more than 50,000 inhabitants (2021)
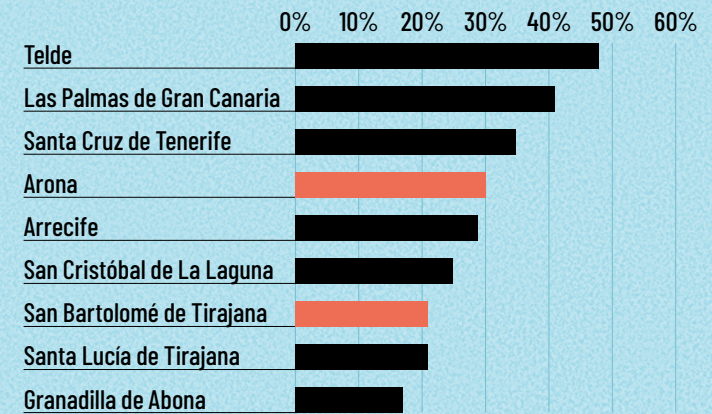
Source: Survey of Essential Population and Housing Characteristics (INE).

Percentage of dwellings affected by poor communications in municipalities with more than 50,000 inhabitants (2021)

Municipality	Value
Telde	~20%
Las Palmas de Gran Canaria	~16%
Granadilla de Abona	~13%
San Bartolomé de Tirajana	~12%
Arrecife	~11%
Arona	~10%
Santa Lucía de Tirajana	~9%
San Cristóbal de La Laguna	~8%
Santa Cruz de Tenerife	~7%

Source: Survey of Essential Population and Housing Characteristics (INE).

Percentage of dwellings affected by crime in their surroundings in municipalities with more than 50,000 inhabitants (2021)

Municipality	Value
Santa Lucía de Tirajana	~31%
Arrecife	~30%
Las Palmas de Gran Canaria	~28%
Arona	~24%
Santa Cruz de Tenerife	~24%
Telde	~22%
San Cristóbal de La Laguna	~20%
Granadilla de Abona	~16%
San Bartolomé de Tirajana	~13%

Source: Survey of Essential Population and Housing Characteristics (INE).

Percentage of dwellings with few green areas in their surroundings in municipalities with more than 50,000 inhabitants (2021)

Municipality	Value
Arrecife	~56%
Telde	~51%
Granadilla de Abona	~44%
Las Palmas de Gran Canaria	~40%
San Bartolomé de Tirajana	~38%
San Cristóbal de La Laguna	~37%
Arona	~35%
Santa Lucía de Tirajana	~35%
Santa Cruz de Tenerife	~35%

Source: Survey of Essential Population and Housing Characteristics (INE).

Percentage of dwellings affected by pollution or odours in municipalities with more than 50,000 inhabitants (2021)

Municipality	Value
Las Palmas de Gran Canaria	~25%
Santa Cruz de Tenerife	~25%
Telde	~21%
San Cristóbal de La Laguna	~16%
Arrecife	~13%
Arona	~12%
San Bartolomé de Tirajana	~12%
Santa Lucía de Tirajana	~12%
Granadilla de Abona	~7%
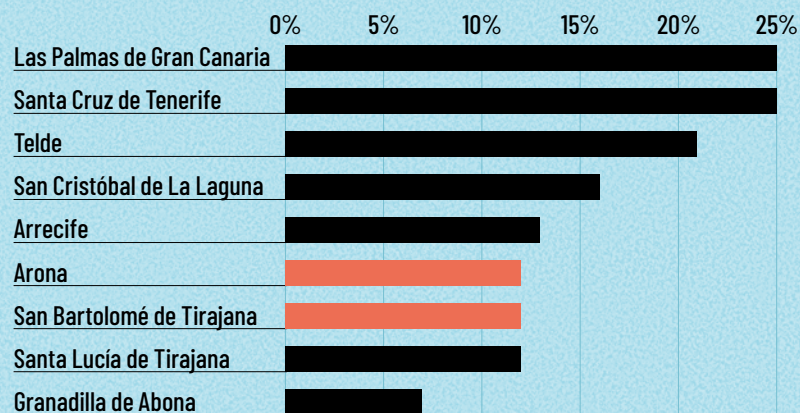
Source: Survey of Essential Population and Housing Characteristics (INE).

The INE offers in its experimental statistics the Multidimensional Quality of Life Indicator (2022) which includes 9 dimensions and 55 indicators and takes Spain as a base (2008=100). In 2021, the global index of quality of life in the Canary Islands presented one of the lowest values in the country, only above Andalusia and Ceuta. In Spain: 101.827. In the Canary Islands: 99.391 (INE, 2022).

In the dimension of this indicator referring to material living conditions (Economic, material and economic security conditions), the Canary Islands is the Autonomous Region with the lowest score. In 2021, Spain: 99.878. In the Canary Islands: 93.293. Specifically, in the dimension of Environment and surroundings (Population suffering from environmental and noise problems; Satisfaction with green zones and recreational areas and Satisfaction with the environment in which they live), the Canary Islands is positioned among the regions with the lowest score. In 2021, Spain: 102,157. In the Canary Islands: 97.440.

Quality of life in the Canary Islands: Dimension referring to Material Living Conditions (2021)
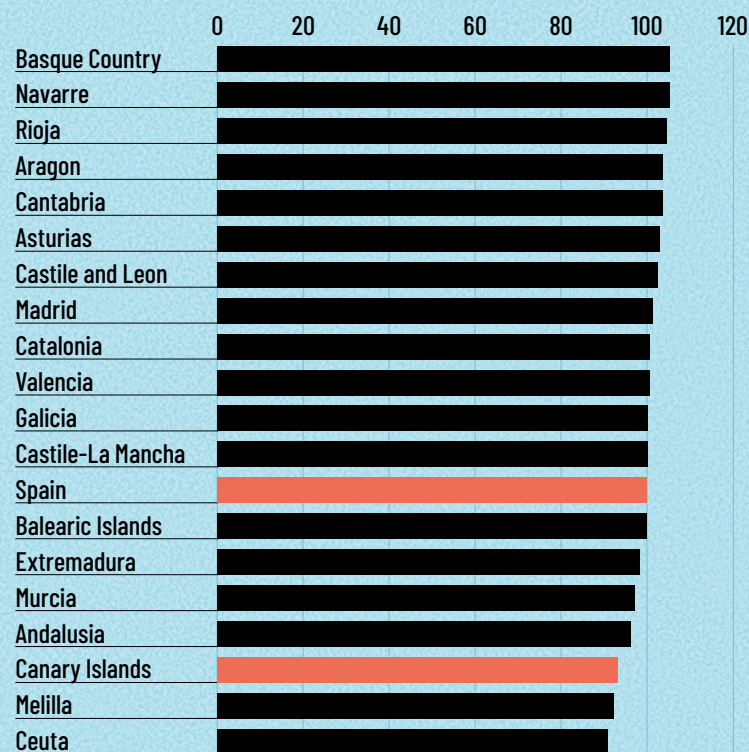
Note: Spain (2008=100)
Source: Multidimensional Quality of Life Indicator - Experimental Statistics (INE).

Quality of life in the Canary Islands: Environment dimension (2021)
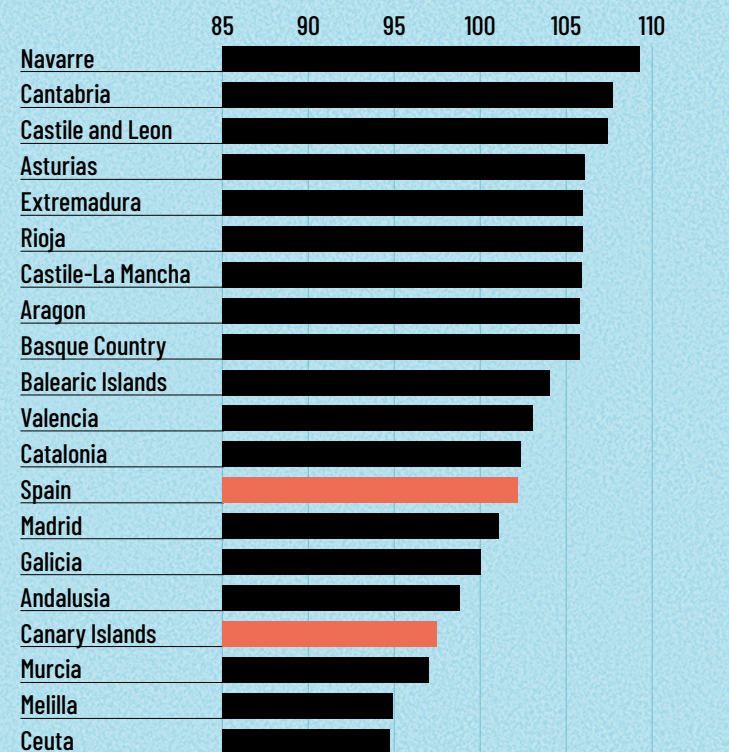
Note: Spain (2008=100)
Source: Multidimensional Quality of Life Indicator - Experimental Statistics (INE).

Global index of quality of life in the Canary Islands
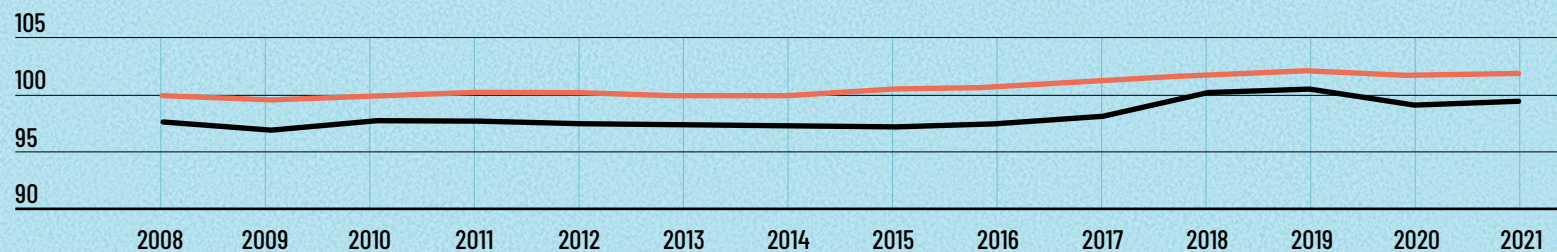
Source: Multidimensional Quality of Life Indicator - Experimental Statistics (INE).

■ Spain ■ Canary Islands

Well-being and quality of life of the local population

The average income per consumption unit in the Canary Islands is €16,703 in 2020. In tourist municipalities this figure is lower than the average (Tías, 15,373€; Arona, 12,828€) except for Teguise, in Lanzarote (19,180€) (INE, 2022). On the other hand, taking into account the data for 2019, the highest income from unemployment benefits in tourist municipalities is recorded by Pájara, La Oliva and Guía de Isora.

Average income per consumption unit in tourist municipalities in the Canary Islands

Municipalities (top to bottom): Teguise, **Canary Islands**, Tías, Puerto de la Cruz, San Bartolomé de Tirajana, Yaiza, Pájara, Adeje, Mogán, Antigua, La Oliva, Guía de Isora, Santiago del Teide, Arona.
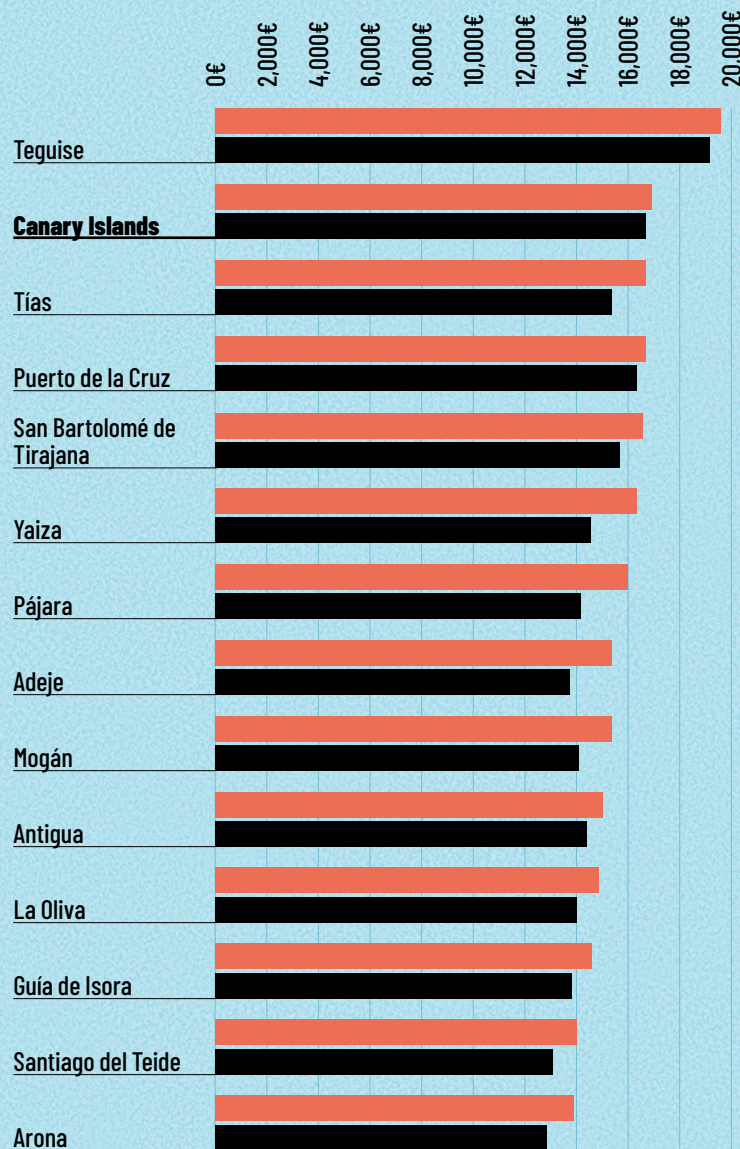
Source: Atlas of household income distribution (INE).

■ 2019
■ 2020

Income from unemployment benefits in tourist municipalities in the Canary Islands

Municipalities (top to bottom): Pájara, La Oliva, Guía de Isora, Yaiza, Arona, Antigua, Mogán, Adeje, **Canary Islands**, Santiago del Teide, Puerto de la Cruz, Tías, Teguise.
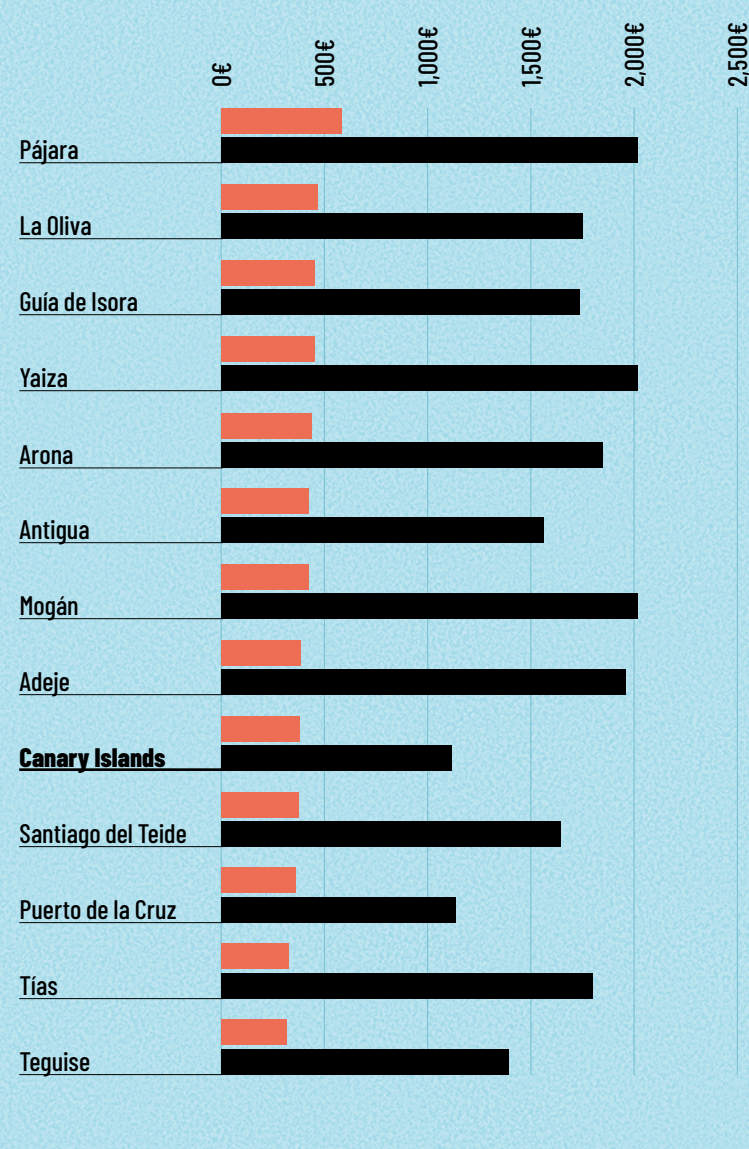
Source: Atlas of household income distribution (INE).

■ 2019
■ 2020

Poverty

One of the apparent contradictions in the Canary Islands is the leadership seen in tourism and the persistence of high poverty indicators. Data from the ISTAC's Survey of Income and Living Conditions show an improvement in 2019 but a fall in 2021 (in the midst of the pandemic).

Generally speaking, the Canary Islands have a high percentage of the popula-tion at risk of poverty (in 2022, 29.4% of the population), only surpassed by Ex-tremadura as well as Ceuta and Melilla. In the case of Spain, this percentage is 20.4% of the population (INE, 2023). Furthermore, the Canary Islands have a much higher percentage of the popu-lation with severe material deprivation and social difficulties (11.9%) than Spain (7.7%) (INE, 2023).

Percentage of population in severe material and social deprivation or at risk of poverty (2022)

Source: Living Conditions Survey (INE)

- ■ Severely materially and socially deprived
- ■ At risk of poverty (income year prior to interview)

Households according to difficulty in making ends meet in the Canary Islands

Source: Survey of Living Conditions (ISTAC).

■ 2017 ■ 2019 ■ 2021
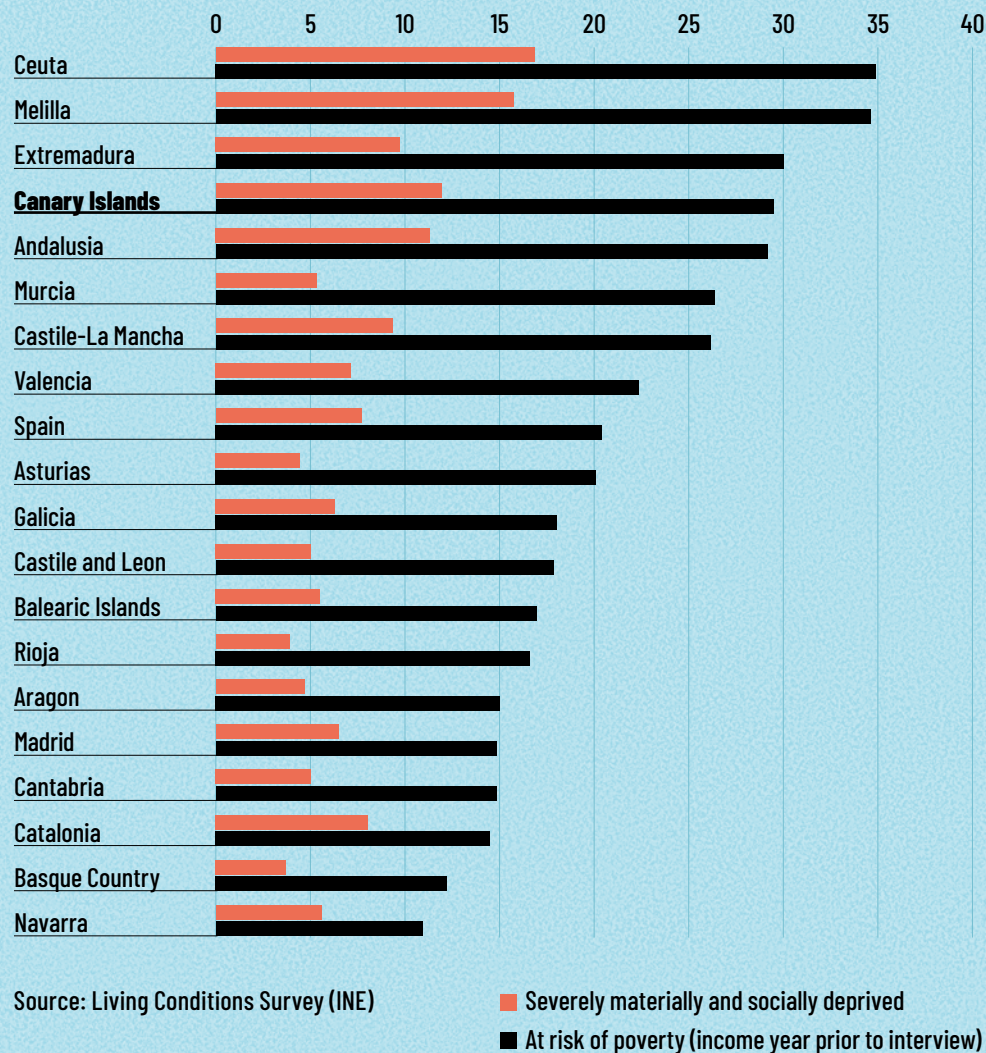
Access to tourism for the local population

The quality of life in an autonomous region with a high level of tourism is also related to the possibilities the population has to enjoy tourism. However, in the case of the Canary Islands, the INE's Living Conditions Survey shows that 40% of the population of the Canary Islands cannot afford to go on holiday at least one week a year, which may be related to economic reasons. The population that cannot afford to go on a one-week holiday is highest in Andalusia, with 45%, and lowest in La Rioja, with 18%.

The number of trips made by residents in the Canary Islands to destinations outside the islands in 2022 amounted to 1.8 million. Of these, 77% were to the mainland, 16% to the rest of Europe and 7% to destinations outside the European continent, according to data from the Resident Tourism Survey (INE).

Number of trips made by Canary Island residents to destinations outside the islands in 2022

Mainland Spain
1,367,135

Europe (excluding Spain)
292,279

Rest of the world (excluding Europe)
125,977
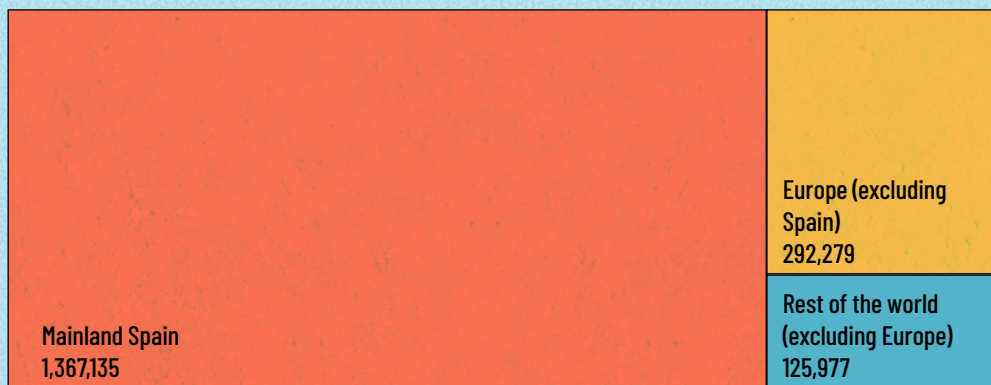
Source: Resident Tourism Survey (INE).

Households by Autonomous Region that cannot afford to go on holiday away from home for at least one week per year (2022)

Andalusia
Extremadura
Murcia
Ceuta
Canary Islands
Galicia
Valencia
Castile-La Mancha
Cantabria
Spain
Balearic Islands
Melilla
Catalonia
Asturias
Castile and Leon
Navarre
Aragon
Madrid
Basque Country
Rioja
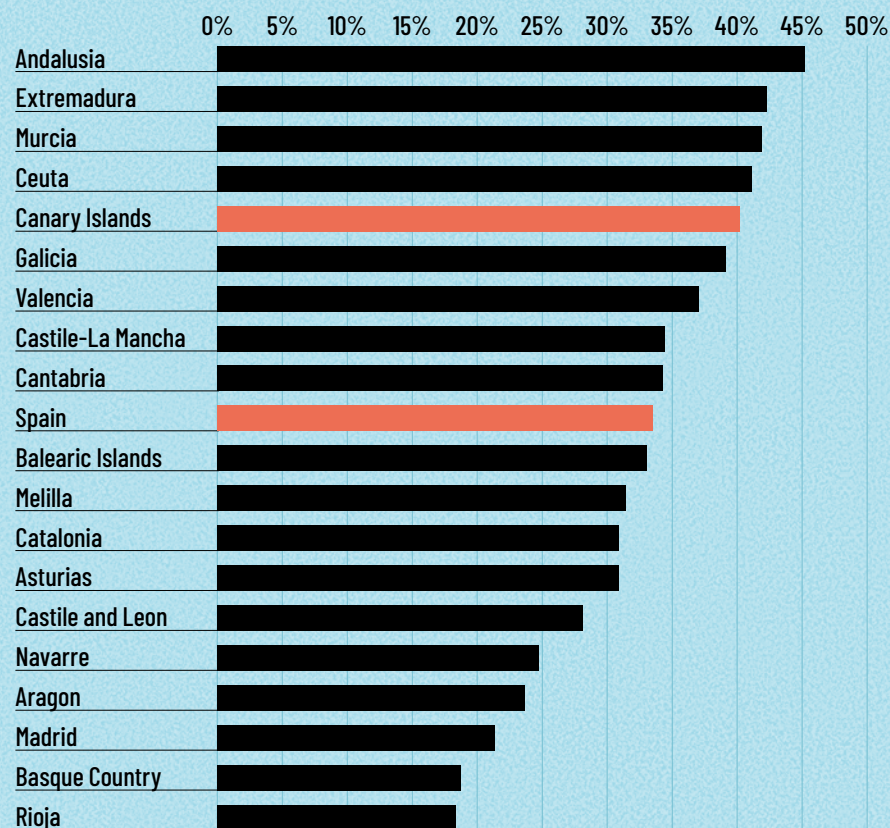
Source: Living Conditions Survey (INE)

Checklist of main indicators of issue area 12:
Local satisfaction with tourism and local well-being

Indicator	Description	Availability	Source	Remarks
Support for tourism development	Rate of local population favorable to additional growth in tourist arrivals or beds	Occasional data	Socioeconomic Habits and Confidence Survey - ECOSOC, 2019 (ISTAC)	Regular data needed
Perception of tourism impacts	Average evaluation of economic, social, cultural and environmental impacts of tourism Nuisances related to tourist activities in the vicinity of the main dwelling	Occasional data	Socioeconomic Habits and Confidence Survey - ECOSOC, 2019 (ISTAC) Survey of Essential Population and Housing Characteristics (INE)	Regular data needed Only available in municipalities with more than 50,000 inhabitants
Environmental awareness	Rate of local population who prefer to protect environment, even if it means lower economic growth	Not Available		
Income and living conditions in tourist municipalities	Average income per unit of consumption in tourist municipalities	Occasional data	Atlas of Household Income Distribution (INE)	

Mass tourism and overtourism

In the Canary Islands, 47 micro-destinations have been identified for statistical purposes. These micro-destinations show a high concentration of accommodation beds. For data-protection reasons, micro-destinations must have at least 500 accommodation beds and a sufficient number of establishments to maintain statistical confidentiality.

93.02% of overnight stays in hotels and tourist apartments in 2022 were located in these micro-destinations, which represent only 1.76% of the total surface area of the region.

The tourism model in the Canary Islands has traditionally been characterised by the specialisation of uses between the main tourist areas and residential areas, helping to reduce the negative impacts of tourism concentration.

In the Canary Islands, there is no general problem of congestion and overtourism, but there are relevant problems related to traffic congestion, congestion of certain natural areas, as well as the availability of housing around tourist areas. It can be said that there is a deficit in the management of the negative effects of tourist concentration in certain points. The even distribution of tourist arrivals throughout the year also helps prevent difficulties with the overtourism.

The Canary Islands have an average of 73 accommodation beds per km^2. This indicator ranges from 107 in Lanzarote to 9 in El Hierro.

In 2022, the Canary Islands have an average of 0.25 accommodation beds (hotels, apartments and holiday homes) per inhabitant. This figure ranges from 0.70 in Fuerteventura to 0.13 in La Palma. The population density, including both residents and tourists staying (only in hotels and apartments), is 324.3 persons per km^2. This figure ranges from 587.6 in Gran Canaria to 43.2 in El Hierro. The municipality with the highest ratio of tourist beds per inhabitant is Pájara (Gran Canaria) with almost 2 tourist beds (1.78) per inhabitant.

The micro-destination of Playa del Inglés (Gran Canaria) and Las Américas – Arona (Tenerife) have the highest number of accommodation beds.

Playa del Inglés (Gran Canaria), with only 3.23 km^2, generated more than 8 million overnight stays in hotels and apartments in 2022, which represents 9.27% of the Canary Islands total.

Tourists' perceptions of sustainability

Tourists positively perceive different aspects related to the sustainability of the destination, as reflected in the Tourism Expenditure Survey with data collected in 2022. The item most highly rated by tourists is the tolerance of the local population towards tourism, with a score of 8.58 on a scale from 0 to 10. On the other hand, the item with the lowest score (6.65) is the overcrowding of tourist areas (ISTAC, 2022).

Tourist perception of sustainability (2022)

	Score
Tolerance of the population towards tourism	8.58
Air quality	8.49
Cleanliness of the island	8.3
Perceived quality of life on the island	8.08
Rational use of water	7.46
Ease of mobility on public transport within the island	7.36
Supply of local products in point of sale	7.14
Recycling	7.14
Use of renewable energies	7.03
Energy saving	6.93
Overcrowding in tourist areas	6.65
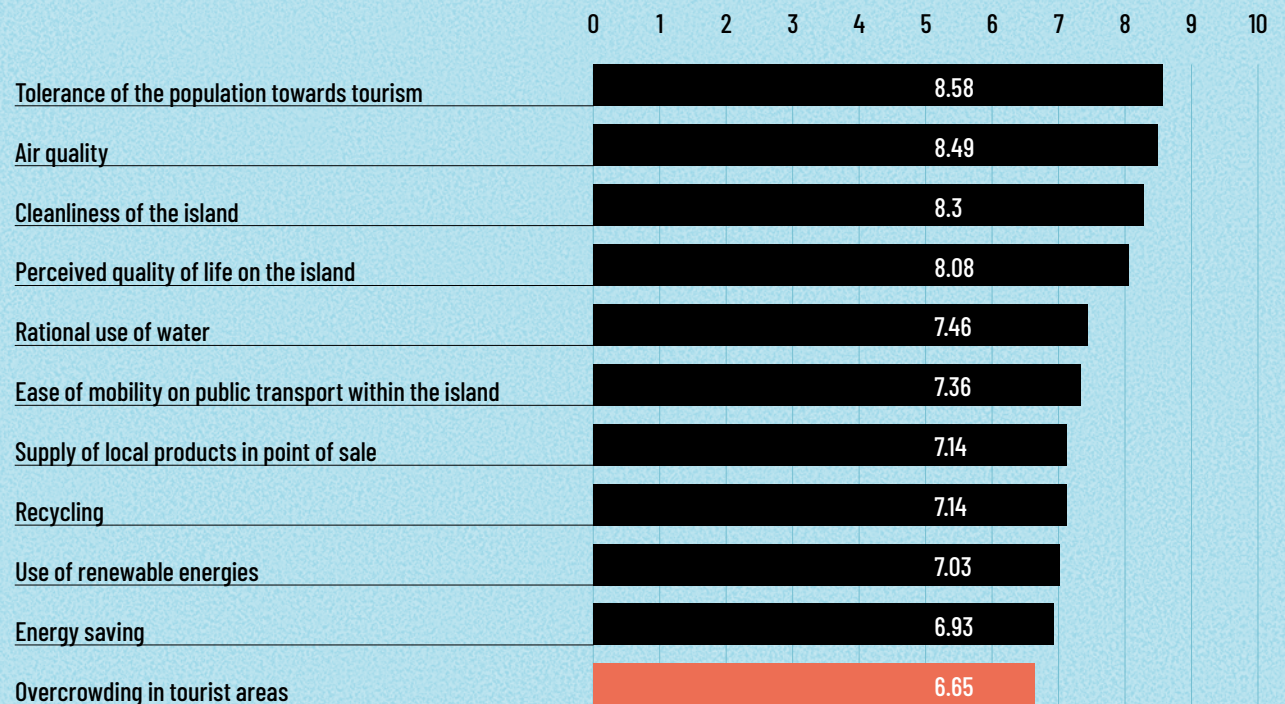
Note: Question: Please rate your perception of the following sustainability measures during your stay. Select from 0 to 10, where 0 is "not important at all" and 10 is "very important".
Source: Tourism Expenditure Survey (ISTAC)

Tourists' perceptions of sustainability. Island profiles.

By island, slight differences can be observed with respect to the Canary Islands average. The results for Lanzarote reflect a score 0.43 points higher than average for the cleanliness of the island and higher scores than the Canary Islands average for air quality, rational use of water and energy, and recycling. In Fuerteventura, there are two aspects rated somewhat worse than the Canary Islands average, such as mobility by public transport and the supply of local products, although, on the positive side, less overcrowding is perceived. In the case of Gran Canaria, the ratings are similar to those of the Canary Islands, with mobility by public transport and the use of renewable energies being the most positive aspects, while air quality and cleanliness are the most negative. The figures for Tenerife are similar to the average, with a slightly lower rating for the use of renewable energy. La Palma, on the other hand, shows a more positive evaluation than the average for most of the concepts, except for mobility, recycling, and the use of renewable energies.

Perception of sustainability (2022): comparative results for the islands compared to the Canary Islands

	Average rating Canary Islands	Difference compared to the assessment of the Canary Islands				
		Lanzarote	Fuerteventura	Gran Canaria	Tenerife	La Palma
Tolerance of the population towards tourism	8.58	0.08	-0.01	0.00	-0.04	0.18
Air quality	8.49	0.22	0.13	-0.18	-0.05	0.35
Cleanliness of the island	8.30	0.43	-0.08	-0.25	-0.02	0.26
Perceived quality of life on the island	8.08	0.06	-0.16	-0.03	0.03	0.23
Rational consumption of water in accommodation, restaurants, public space	7.46	0.20	-0.11	-0.08	0.00	0.30
Ease of mobility on public transport within the island	7.36	0.06	-0.50	0.22	0.02	-0.26
Recycling in accommodation, restaurants, etc.	7.14	0.21	-0.05	-0.10	0.00	-0.32
Offer of local products at points of sale	7.14	0.11	-0.21	-0.06	0.06	0.29
Use of renewable energies	7.03	0.06	-0.04	0.18	-0.12	-0.32
Energy saving in accommodation, restaurants, public spaces	6.93	0.18	-0.07	-0.02	-0.03	0.20
Massification in tourist areas	6.65	0.02	-0.27	0.00	0.10	-0.05

Note 1: Question: Please rate your perception of the following sustainability measures during your stay. Please select from 0 to 10, where 0 is "not important at all" and 10 is "very important".
Note 2: The result for the islands is the result of a subtraction (their respective rating minus the average for the Canary Islands), so a positive result means a higher rating than the average for the Canary Islands and vice versa. Source: Tourist Expenditure Survey (ISTAC)

Hotels, apartments and holiday homes and their distribution by island

Territories	Area (km²) (ISTAC, 2023)	Inhabitants (Census of population INE, ene.2022)	Hotel beds (TAS, ISTAC 2022)	Apartment beds (TAS, ISTAC 2022)	Holiday homes beds (GTR, oct.23)	Holiday homes beds (INE, feb.23)	Total beds (TAS + GTR)	Overnight stays (TAS ISTAC 2022)	Tourist equivalent population (hotels and apartments) (ISTAC, 2022)	Total beds / 100 inhabitants (tourist intensity)	Total beds / km² (tourist density)	Inhabitants + Equivalent tourist population / Area
Canary Islands	7,447	2,177,701	251,308	98,042	195,994	179,998	545,344	86,708,053	237,556	25	73	324
Tenerife	2,034.38	931,646	89,503	34,193	80,479	68,492	204,176	31,405,937	86,044	22	100	500
Gran Canaria	1,560.10	853,262	65,951	30,934	49,849	39,223	146,734	23,157,953	63,446	17	94	588
Lanzarote	845.94	156,112	41,371	20,640	28.001	33,364	90,652	16,792,166	46,006	58	107	239
Fuerteventura	1,659.74	120,021	49,309	8,522	25,763	26,727	83,593	13,762,076	37,704	70	50	95
La Palma	708.32	83,439	3,242	1,697	5,974	6,963	10,914	838,305	2,297	13	15	121
La Gomera	369.76	21,798	1,621	1,651	3,494	3,253	6,766	682,637	1,870	31	18	64
El Hierro	268.71	11,423	312	405	1,794	1,976	2,511	68,979	189	22	9	43
La Graciosa	29.05	718	27		640		667			93	23	

Note: The concept of equivalent tourist population published by the ISTAC refers to the average number of tourists staying in hotels and apartments (not including holiday homes) each day (number of overnight stays divided by the number of days).

Sources: Tourist Accommodation Survey (TAS), 2022 (ISTAC). Territorial Statistics, 2023 (ISTAC). General Tourist Register of the Government of the Canary Islands, 2023 (GTR). Measurement of the number of holiday homes in Spain and their capacity - Experimental Statistics, 2023 (INE). Census of population and housing, 2022 (INE).

Hotels, apartments and holiday homes in the 10 municipalities with the highest number of beds

Municipalities	Area (km²) (ISTAC, 2023)	Inhabitants (Census of population INE, ene.2022)	Hotel beds (TAS, ISTAC 2022)	Apartment beds (TAS, ISTAC 2022)	Holiday homes beds (GTR, oct.23)	Holiday homes beds (INE, feb.23)	Total beds (TAS + GTR)	Overnight stays (ISTAC, TAS 2022)	Tourist equivalent population (hotels and apartments)) (ISTAC, 2022)	Total beds / 100 inhabitants (tourist intensity)	Total beds / km²(tourist density)	Inhabitants + Equivalent tourist population / Area
SB de Tirajana	333.13	52,936	41,996	21,744	12,847	14,182	76,587	15,224,237	41,710	145	230	284
Adeje	105.95	49,270	34,827	9,406	15,218	17,090	59,451	12,632,387	34,609	121	561	792
Arona	81.79	82,982	21,063	17,162	16,358	14,871	54,583	8,865,243	24,288	66	667	1.312
Pájara	383.52	20,751	29,044	4,226	3,583	4,522	36,852	7,915,352	21,686	178	96	111
Mogán	172.44	20,331	16,022	8,520	7,795	6,752	32,337	6,338,016	17,364	159	188	219
Tías	64.61	21,083	12,223	12,698	7,025	8,311	31,947	6,859,580	18,793	152	494	617
Yaiza	211.85	16,924	16,074	4,083	9,192	11,662	29,349	5,509,820	15,095	173	139	151
La Oliva	356.13	27,945	11,164	1,662	13,860	14,708	26,686	3,290,168	9,014	95	75	104
Puerto de la Cruz	8.73	30,349	14,162	4,202	4,515	3,005	22,879	4,352,393	11,924	75	2,621	4,842
Las Palmas GC	100.55	378,797	6,823	670	15,352	8,058	22,845	1,414,206	3,875	6	227	3.806

Note: The concept of equivalent tourist population published by the ISTAC refers to the average number of tourists staying in hotels and apartments (not including holiday homes) each day (number of overnight stays divided by the number of days)

Sources: Tourist Accommodation Survey, 2022 (ISTAC). Territorial Statistics, 2023 (ISTAC). General Tourist Register of the Canary Islands Government, 2023 (GTR). Measurement of the number of holiday homes in Spain and their capacity - Experimental Statistics, 2023 (INE). Census of population and housing, 2022 (INE).

Hotels, apartments and holiday homes in the 10 tourist micro-destinations with the highest number of beds

Micro-destinations	Area (km²) (ISTAC, 2023)	Inhabitants (ISTAC, 2021)	Hotel beds (TAS, ISTAC 2022)	Apartment beds (TAS, ISTAC 2022)	Holiday homes beds (GTR, jun.23)	Total beds (TAS + GTR)	Equivalent tourist population (hotels and apartments) (ISTAC, 2022)	Overnight stays (TAS, ISTAC 2022)	Total,beds / 100 inhabitants (tourist intensity)	Total beds / km² (tourist density)	Inhabitants + Equivalent tourist population / Area
Playa del Inglés (Gran Canaria)	3.2	6,131	20,339	14,335	3,018	37,692	22,015	8,035,344	614.8	11,672.0	8,715.8
Las Américas – Arona (Tenerife)	2.7	4,529	16,517	9,006	2,811	28,334	17,724	6,469,093	625.6	10,665.1	8,375.7
Costa Adeje (Tenerife)	1.4	3,133	12,899	4,990	1,270	19,159	14,213	5,187,862	611.5	14,013.5	12,687.7
Corralejo (Fuerteventura)	6.7	15,495	9,985	1,530	6,274	17,789	8,025	2,928,975	114.8	2,666.6	3,525.7
Los Critianos (Tenerife)	3.3	15,120	3,211	7,979	3,679	14,869	6,208	2,265,819	98.3	4,478.8	6,424.7
Playa de El Duque (Tenerife)	3.6	1,877	12,100	602*	1,629	14,331	10,493	3,829,988	763.5	4,017.8	3,468.1
Matagorda - Los Pocillos (Lanzarote)	3.1	1,111	10,010	2,950	723	13,683	10,211	3,727,197	1.231.6	4,484.4	3,710.8
Caleta de Fuste (Fuerteventura)	7.5	7,711	7,613	2,634	3,337	13,584	5,926	2,162,958	176.2	1,817.9	1,825.0
Esquinzo - Butihondo (Fuerteventura)	5.9	1,446	12,674	510*	111	13,295	9,774	3,567,415	919.4	2,257.3	1,904.9
Costa Teguise - Litoral (Lanzarote)	3.1	4,256	8,654	3,067	1,443	13,164	8,823	3,220,398	309.3	4,299.8	4,272.1

Note: The concept of equivalent tourist population published by the ISTAC refers to the average number of tourists staying in hotels and apartments (not including holiday homes) each day (number of overnight stays divided by the number of days)

Sources: Tourist Accommodation Survey (TAS), 2022 (ISTAC). Territorial Statistics, 2023 (ISTAC). Location of holiday homes (ISTAC) from the General Tourist Register of the Canary Islands Government, June 2023 (GTR). Official Population Figures, 2021 (ISTAC). * Own estimation.

Concentration of accommodation modalities in the micro-destinations and methodological note

Methodological note on non-hotel accommodation. The data from the ISTAC Accommodation Surveys refer only to hotels and apartments. However, within non-hotel establishments, there are some types of establishments other than apartments in Canarian legislation. Some extra-hotel establishments not considered in the ISTAC Accommodation Survey in apartments but which are included in the general tourist register and their number of accommodation beds on 21 September 2023 are the following: villas (2,713 bedplaces), rural houses (3,935 bedplaces) or emblematic houses (555 bedplaces).

This group of extra-hotel establishments has been joined in recent years by nearly 196,000 accommodation beds in holiday homes, the measurement problems of which are dealt with later in this document. While the official figures for hotel beds are subject to minor discrepancy between sources, this is not the case for apartments. There is a wide discrepancy in the number of beds in apartments between the General Tourism Register, the ISTAC's Alojatur directory, the ISTAC's Apartment Accommodation Survey and the INE's Apartment Occupancy Survey. This discrepancy seems to be related, in part, to the transformation of apartments vacancies into residential and/or holiday homes.

Concentration of tourist accommodation in the Canary Islands: 47 micro-destinations. 2023

Micro-destinations represent:
1.7% of the territory
91.3% of hotel and apartment beds
45.8% of holiday home beds
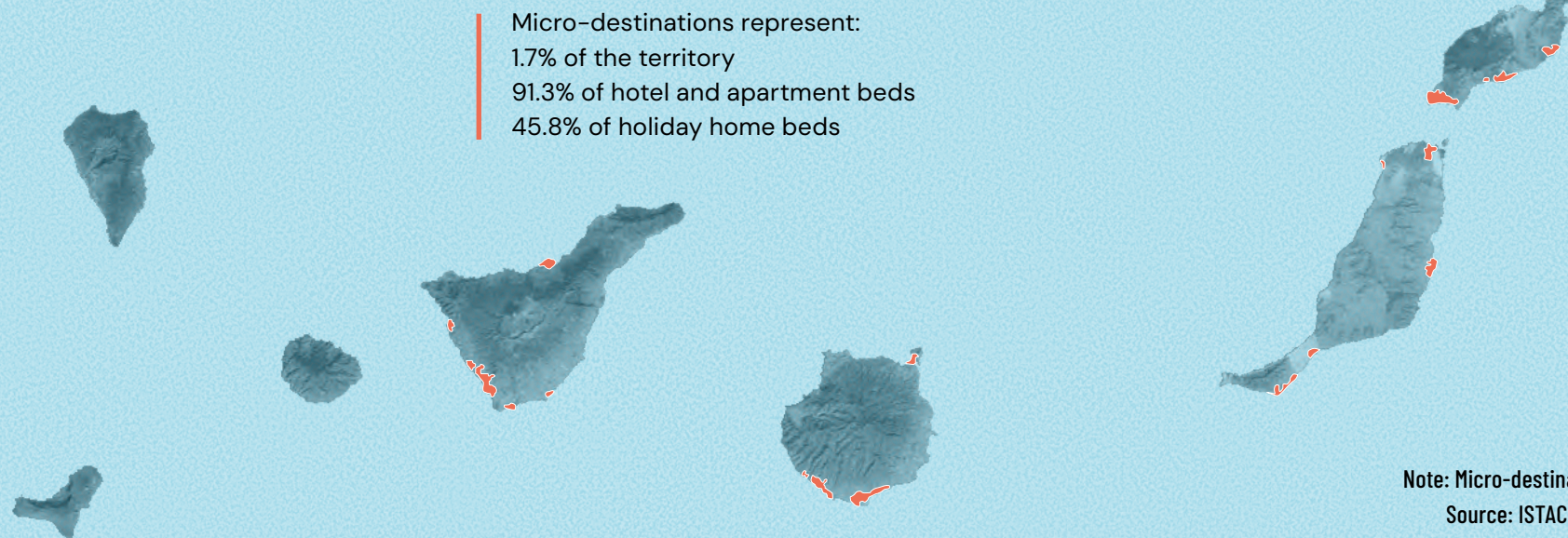
Note: Micro-destinations are highlighted in red.
Source: ISTAC and University of La Laguna
Data for hotels and apartments are from the Accommodation Survey (ISTAC)
Data for holiday homes are from the General Tourist Register of the Canary Islands Government.

Territorial distribution of hotels, apartments and holiday homes

According to the ISTAC Tourist Accommodation Survey, the island with the highest number of accommodation beds, both in hotels and apartments, and in holiday homes, is Tenerife. By municipalities, San Bartolomé de Tirajana stands out for the number of accommodation beds, followed by Adeje, Arona, Pájara and Mogán. Moving down the scale of micro-destinations, Playa del Inglés, Las Américas–Arona, Costa Adeje and Corralejo have the highest number of beds. It is interesting to note that the municipalities with the highest concentration of traditional tourist accommodation also show a significant concentration of holiday homes. However, when we go down to the scale of micro-destinations, beds in hotels and apartments predominates in most destinations. This shows that holiday homes are quite present in the tourist municipalities, but often both inside and outside the so-called micro-destinations, which concentrate accommodation beds in hotels and apartments and have fewer holiday homes for both residential and holiday use.

Number of bed places by type of accommodation in the 10 municipalities with the most bedplaces
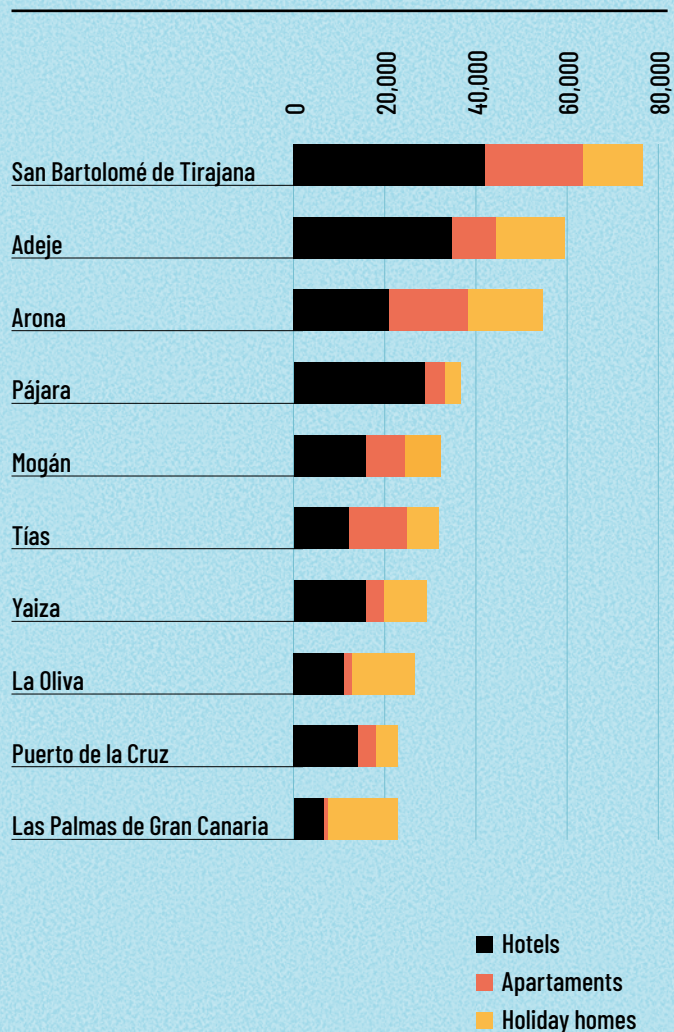
Scale: 0, 20,000, 40,000, 60,000, 80,000

- San Bartolomé de Tirajana
- Adeje
- Arona
- Pájara
- Mogán
- Tías
- Yaiza
- La Oliva
- Puerto de la Cruz
- Las Palmas de Gran Canaria

Legend:
- ■ Hotels
- ■ Apartaments
- ■ Holiday homes

Source: Tourist Accommodation Survey, 2022 (ISTAC) and General Tourist Register of the Government of the Canary Islands, Oct. 2023 (GTR).

Number of bed places on each island by type of accommodation

Scale: 0, 50,000, 100,000, 150,000, 200,000

- Tenerife
- Gran Canaria
- Lanzarote
- Fuerteventura
- La Palma
- La Gomera
- El Hierro
- La Graciosa

Legend:
- ■ Hotels
- ■ Apartaments
- ■ Holiday homes

Source: Tourist Accommodation Survey, 2022 (ISTAC) and General Tourist Register of the Government of the Canary Islands, Oct. 2023 (GTR).

Number of bedplaces by type of accommodation in the 10 tourist micro-destinations with the most bed places

Scale: 0, 10,000, 20,000, 30,000, 40,000

- Playa del Inglés (GC)
- Las Américas – Arona (TF)
- Costa Adeje (TF)
- Corralejo (FV)
- Los Cristianos (TF)
- Playa de El Duque (TF)
- Matagorda – Los Pocillos (LZ)
- Caleta de Fuste (FV)
- Esquinzo – Butihondo (FV)
- Costa Teguise – Litoral (LZ)

Legend:
- ■ Hotels
- ■ Apartaments
- ■ Holiday homes

Source: Tourist Accommodation Survey, 2022 (ISTAC) and Location of holiday homes (ISTAC) from the General Tourist Register of the Canary Islands Government, Jun. 2023. (GTR)
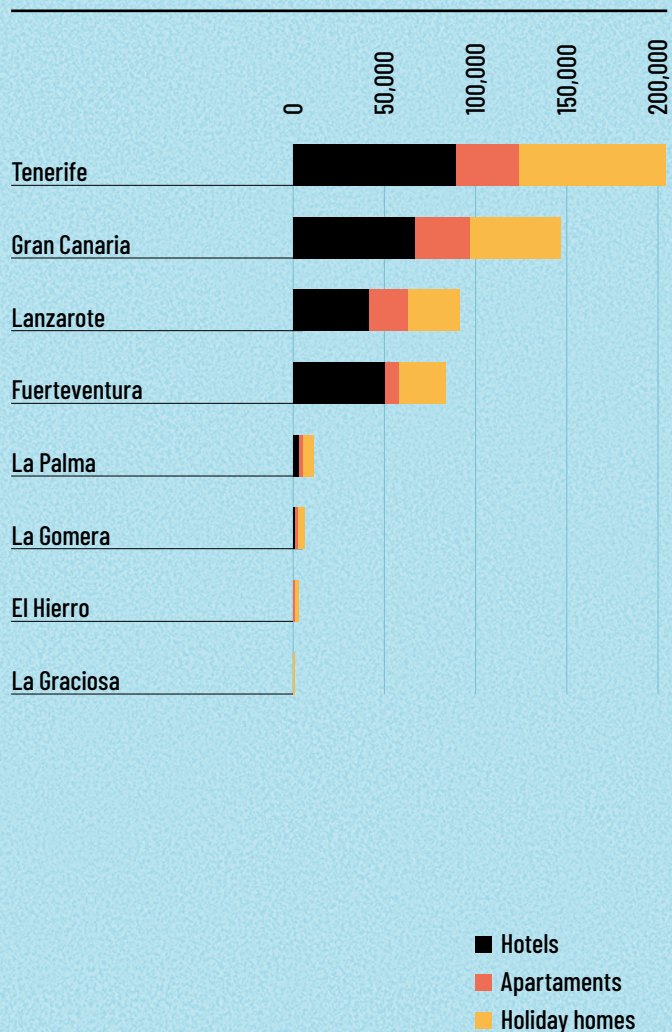
Territorial distribution of accommodation beds in percentages

The analysis of the distribution of the types of tourist accommodation beds by island in percentage terms shows that the island with the greatest relative weight of holiday homes within its tourist accommodation structure is La Graciosa, followed by El Hierro, La Palma and La Gomera. In fact, the islands with the lowest percentage of holiday homes are Fuerteventura, Lanzarote, Gran Canaria and Tenerife, where this type of accommodation represents between 30 and 40% of the total. However, holiday homes do have an important relative weight in some municipalities, such as Las Palmas de GC, La Oliva, Arona and Yaiza. Going down to the level of micro-destinations, it can be seen that, as a general rule, hotel and non-hotel accommodation predominates in them.

Distribution of accommodation bed places by typology in the municipalities with the highest number of beds

Pájara
Puerto de la Cruz
Adeje
San Bartolomé de Tirajana
Yaiza
Mogán
La Oliva
Arona
Tías
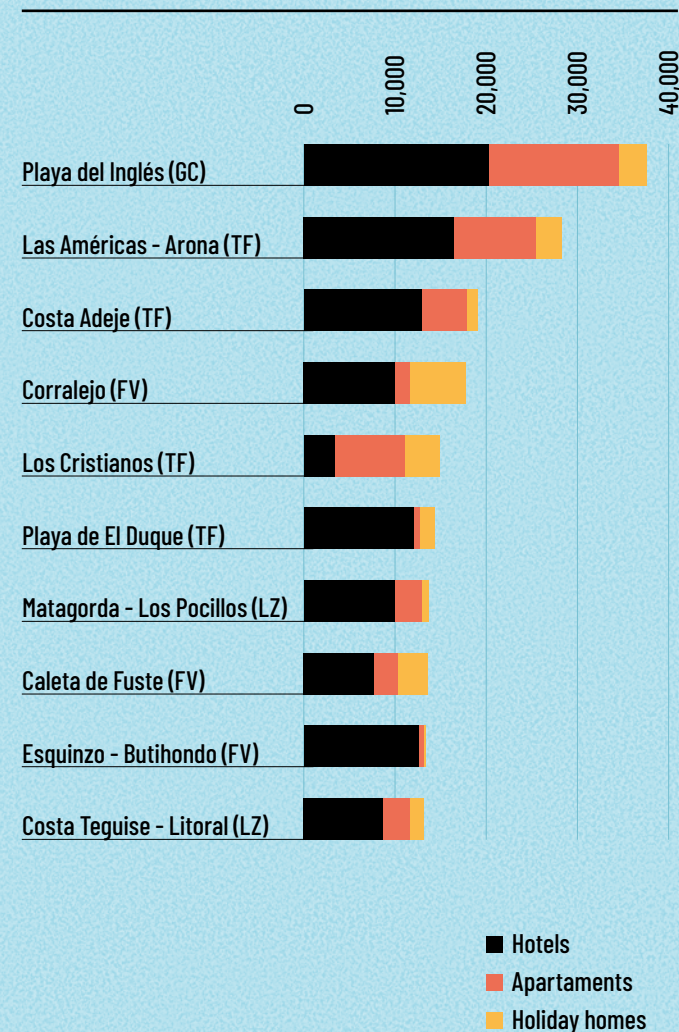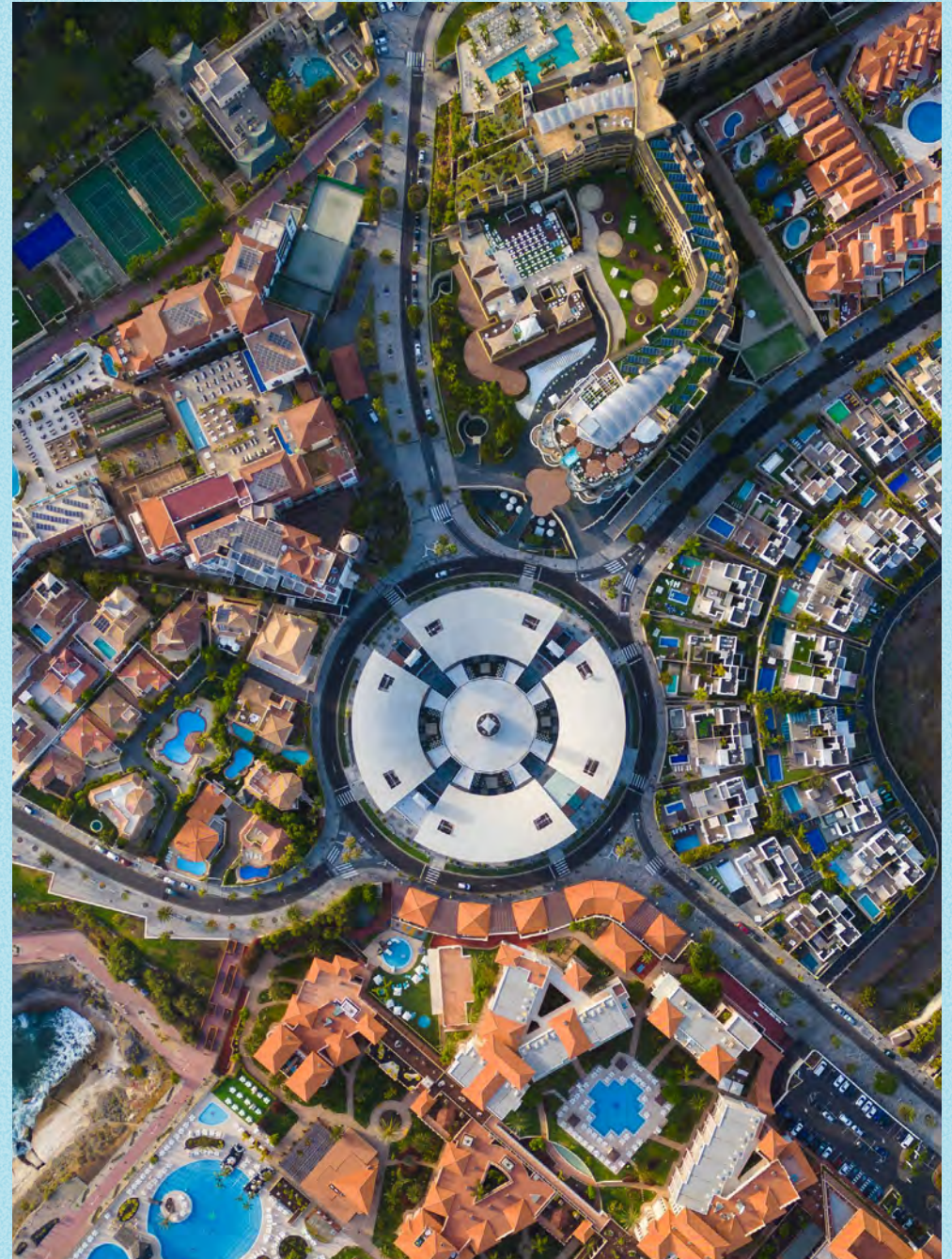Las Palmas de Gran Canaria

- Hotels
- Apartaments
- Holiday homes

Source: Tourist Accommodation Survey, 2022 (ISTAC) and General Tourist Register of the Government of the Canary Islands, Oct. 2023 (GTR).

Distribution of accommodation bed places by type and island

Fuerteventura
Lanzarote
Gran Canaria
Tenerife
La Palma
La Gomera
El Hierro
La Graciosa

- Hotels
- Apartaments
- Holiday homes
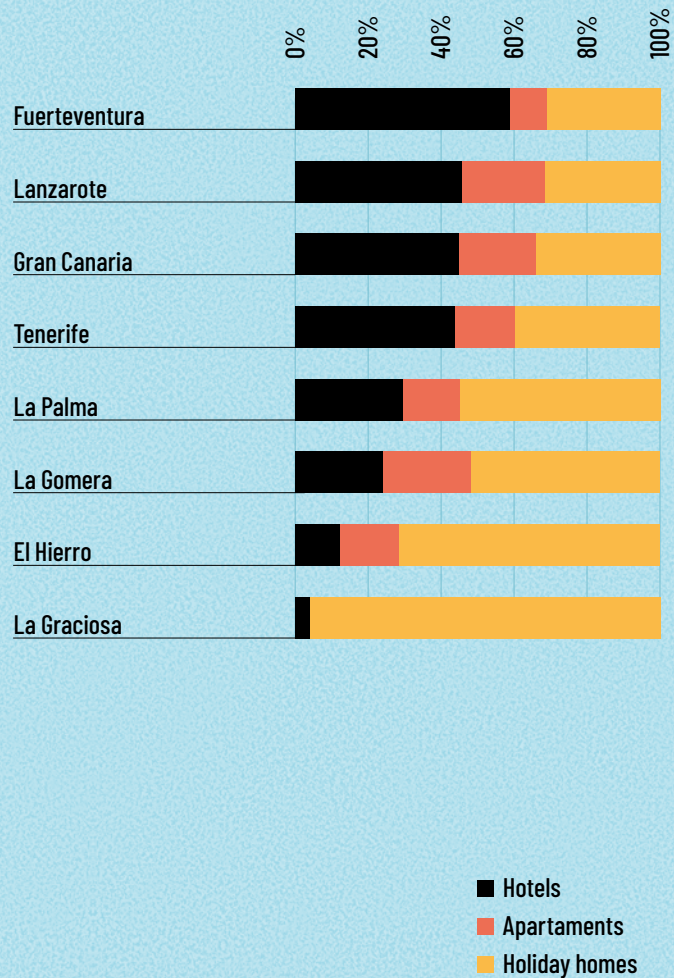
Source: Tourist Accommodation Survey, 2022 (ISTAC) and General Tourism Register of the Canary Islands Government, Oct. 2023 (GTR).

Distribution of accommodation bed places in the micro-destinations with the highest number of beds
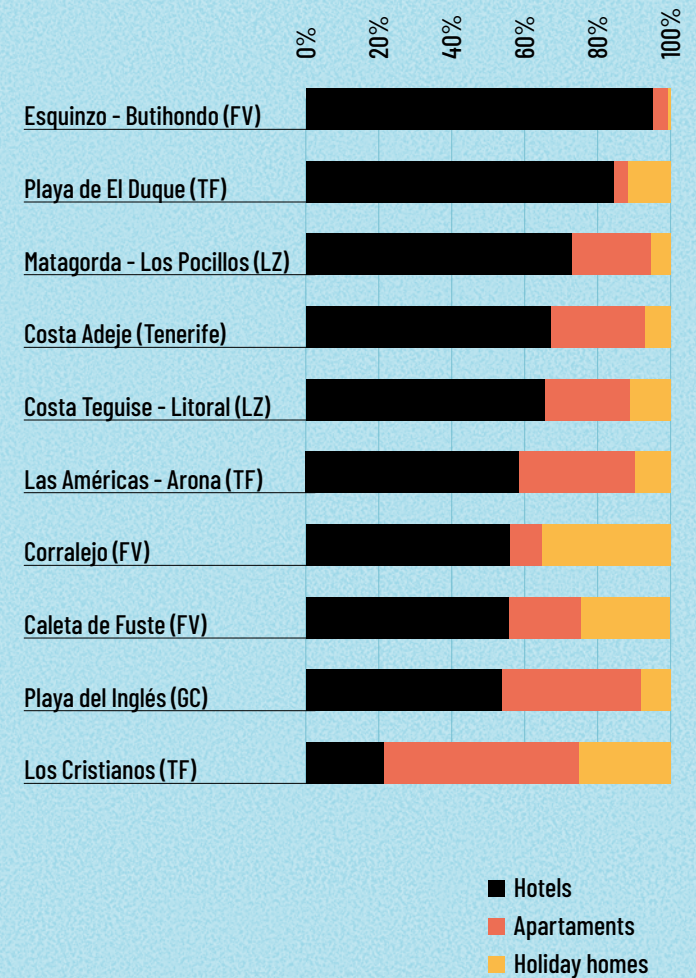
Esquinzo - Butihondo (FV)
Playa de El Duque (TF)
Matagorda - Los Pocillos (LZ)
Costa Adeje (Tenerife)
Costa Teguise - Litoral (LZ)
Las Américas - Arona (TF)
Corralejo (FV)
Caleta de Fuste (FV)
Playa del Inglés (GC)
Los Cristianos (TF)

- Hotels
- Apartaments
- Holiday homes

Source: Tourist Accommodation Survey, 2022 (ISTAC) and Location of holiday homes (ISTAC) from the General Tourist Register of the Canary Islands Government, Jun.2023. (GTR)
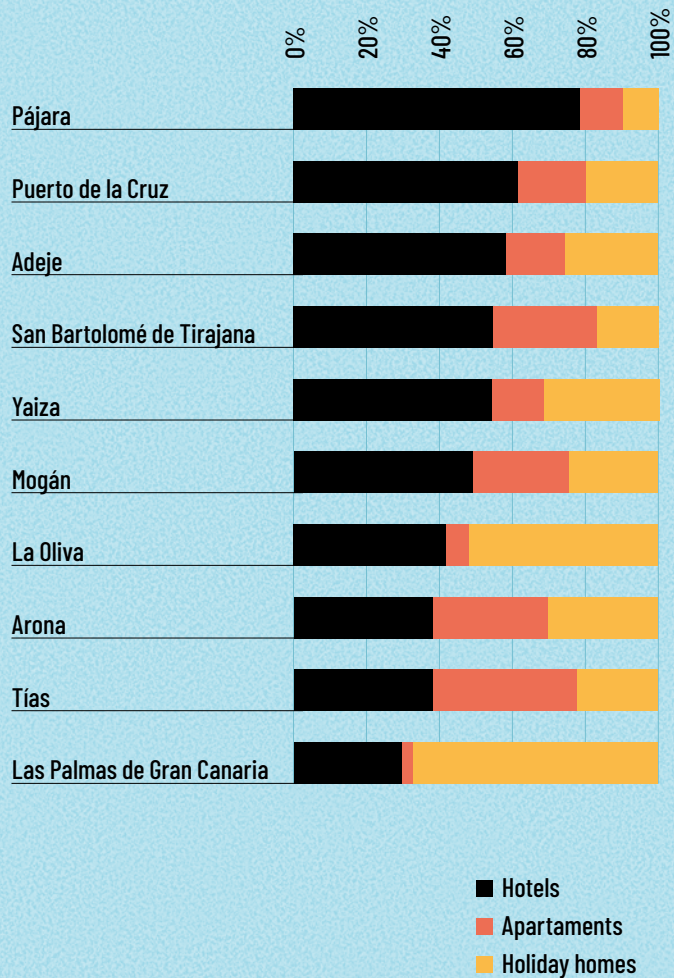
Comparison of holiday home data sources

The two main public sources on holiday homes in the Canary Islands show quite divergent results. The INE's experimental statistics give a total number of holiday home beds in the Canary Islands of 179,998 in February 2023, while the data published by the General Tourist Register indicates that there would be 195,994 in October 2023. When we go down to the level of municipalities, the differences do become palpable. For example, in the case of Adeje, the experimental statistics detected in its scraping of the platforms approximately 17,000 beds, while the General Tourist Register indicates that there are approximately 13,000 official beds. This situation is reversed in the case of Las Palmas de Gran Canaria, where the number of beds in the register is much higher than those detected by the web scraping of the platforms carried out by the INE in February 2023. The causes of the discrepancy can be very varied: on one hand, there are registered holiday homes that have actually left the market (to enter, for example, the residential rental market), or that continually enter and leave the market, which makes it difficult to identify them. On the other hand, there are illegal holiday homes, which are operational but not registered.

In the years 2015 to 2019, the Canary Islands Government commissioned annual reports on holiday homes produced through web scraping. However, these reports ceased to be produced coinciding with the pandemic.

Tourist accommodation beds by municipality: according to INE experimental statistics
and the General Tourist Register of the Government of the Canary Islands.
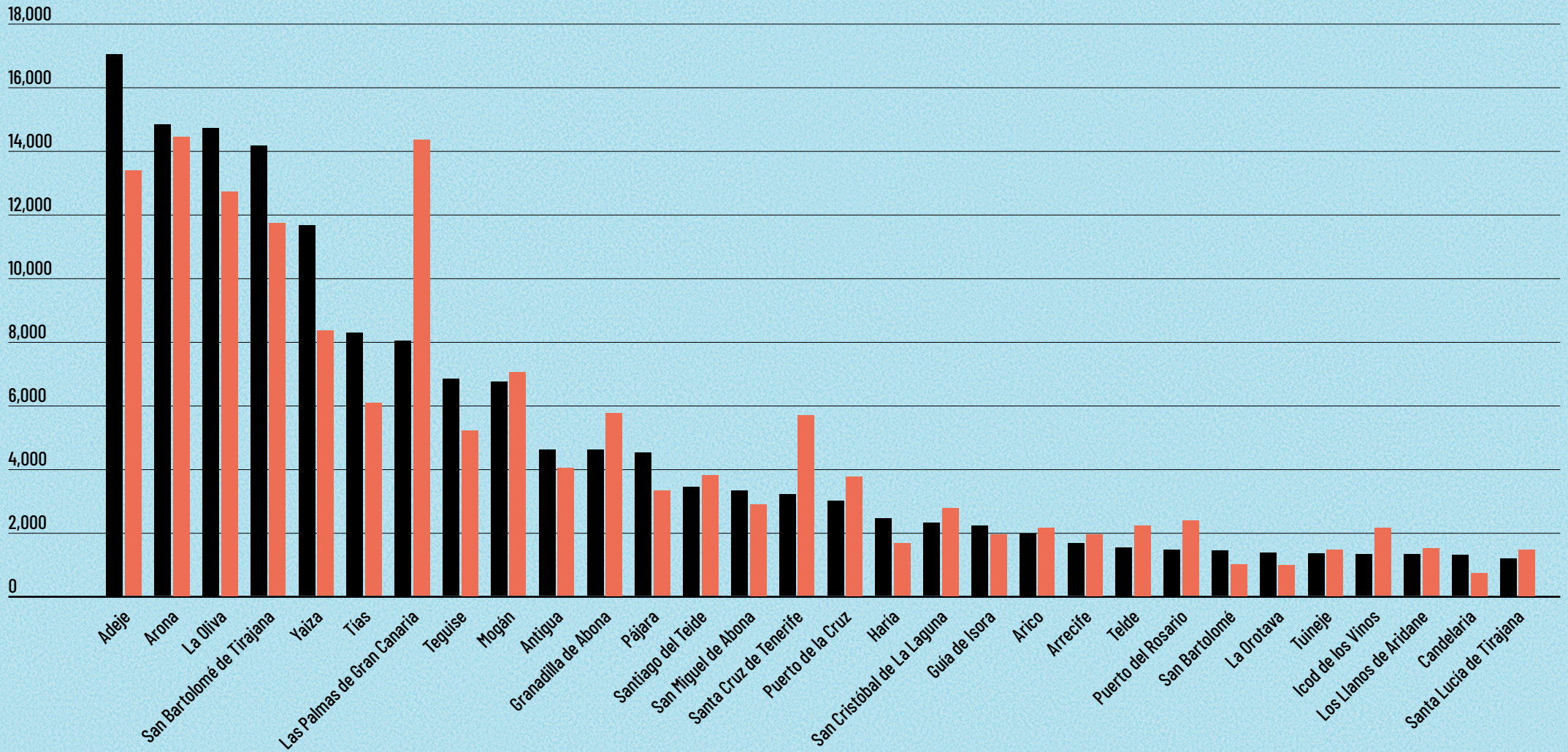
Source: Prepared by the authors based on the Measurement of the number of holiday homes in Spain and their capacity (INE), Feb-23, and the General Tourist Register of the Canary Islands Government, Oct-23.

■ INE Experimental Statistics - Feb.23
■ General Tourist Register

Holiday homes by Autonomous Region

The experimental statistics published by the INE (based on web scraping of holiday home platforms) show that, after the Balearic Islands, the Canary Islands is the region with the highest ratio of accommodation beds in holiday homes for tourist use in relation to the population. Moreover, these holiday homes are concentrated in certain areas, which poses a challenge for tourism planning at regional, island and municipal level.

Ratio of holiday homes beds per 100 inhabitants (Feb–2023)
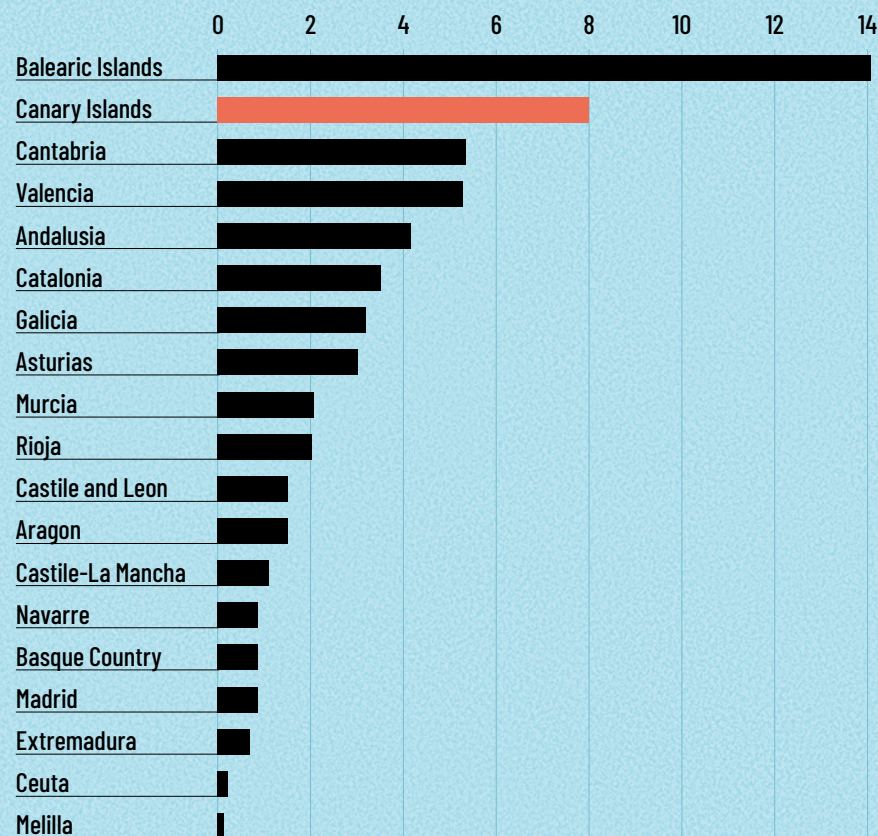
Source: Population by autonomous regions (January, 2022) and Measurement of the number of holiday homes in Spain (February, 2023) (INE).

Holiday homes by Autonomous Region (detail)

The experimental statistics published by the INE show that there is little seasonality in the supply of tourist housing, although in the Canary Islands there tends to be more supply in winter than in summer, unlike in most other regions. The non-existence of high seasonality in the supply of holiday homes is related to the fact that the fixed costs of being on the market are minimal in the case of holiday homes, unlike what happens with other types of establishments.

	Holiday home beds			Inhabitants	Beds / 100 inhabitants	
	Aug-22	Feb-23	Var.%	Jan-22	Aug-22	Feb-23
Andalusia	352,275	351,011	-0.4%	8,479,745	4.2	4.1
Catalonia	274,564	253,531	-7.7%	7,792,611	3.5	3.3
Valencia	267,537	257,306	-3.8%	5,097,967	5.2	5.0
Canary Islands	**172,773**	**179,998**	**4.2%**	**2,177,701**	**7.9**	**8.3**
Balearic Islands	165,436	156,841	5.2%	1,176,659	14.1	13.3
Galicia	85,282	78,069	-8.5%	2,679,520	3.2	2.9
Madrid	57,667	60,396	4.7%	6,750,336	0.9	0.9
Castile and Leon	35,890	36,124	0.7%	2,372,640	1.5	1.5
Murcia	31,927	32,636	2.2%	1,531,878	2.1	2.1
Cantabria	31,294	28,658	-8.4%	585,402	5.3	4.9
Asturias	30,391	28,957	-4.7%	1,004,686	3.0	2.9
Castile-La Mancha	22,184	23,553	6.2%	2,053,328	1.1	1.1
Aragon	19,867	20,324	2.3%	1,326,276	1.5	1.5
Basque Country	19,034	18,217	-4.3%	2,208,174	0.9	0.8
Extremadura	7,050	7,328	3.9%	1,050,726	0.7	0.7
Rioja	6,465	6,156	-4.8%	319,892	2.0	1.9
Navarra	5,791	5,895	1.8%	664,117	0.9	0.9
Ceuta	196	167	-14.8%	83,117	0.2	0.2
Melilla	145	201	38.6%	85,170	0.2	0.2
Total Spain	1,585,768	1,545,368	-2.5%	47,439,945	3.3	3.3

Source: Prepared by the authors based on Census of population and housing and Measurement of the Number of Tourist Dwellings in Spain (INE).

Holiday homes by municipality in Spain. August vs. February

Ranking according to the ratio of holiday home beds per 100 inhabitants (August-2022)

Note: Only municipalities with more than 5,000 holiday home beds have been considered.

Source: Prepared by the authors based on Census of population and housing and Measurement of the number of holiday homes in Spain (INE).

Ranking according to the ratio of holiday home beds per 100 inhabitants (February-2023)
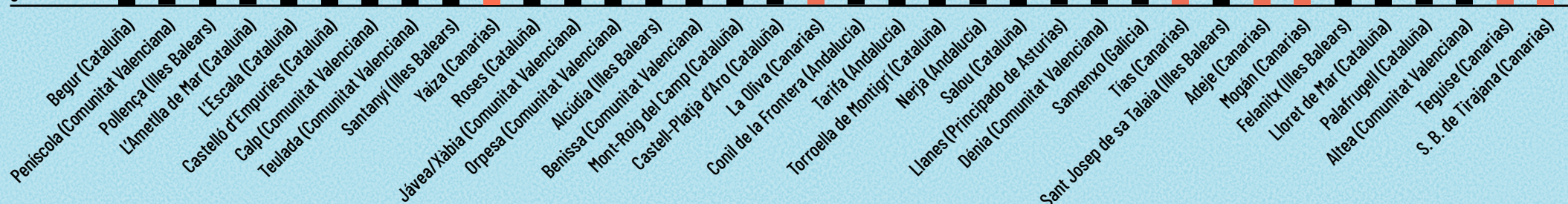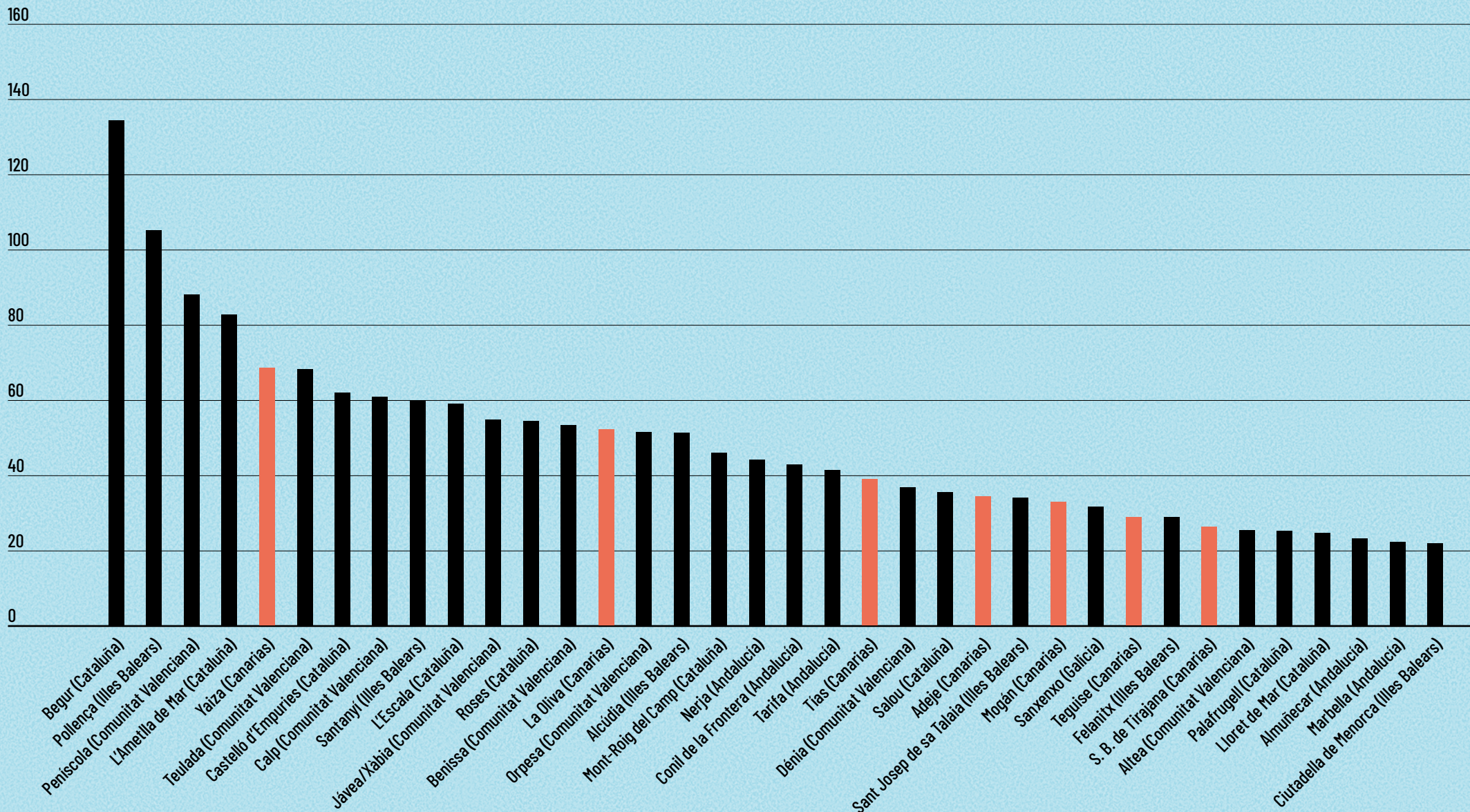

Note: Only municipalities with more than 5,000 holiday home beds have been considered.

Source: Prepared by the authors based on Census of population and housing and Measurement of the number of holiday homes in Spain (INE).

Holiday home beds per 100 inhabitants by island and municipality in the Canary Islands

Tourism intensity is measured by comparing supply and/or demand indicators with the resident population in the study area. An analysis of the importance of holiday homes by islands shows that the easternmost tourist islands, Fuerteventura and Lanzarote, have the highest ratio of holiday home beds per 100 inhabitants, according to INE's experimental statistics based on web scraping on the main platforms. In an intermediate situation would be the so-called green islands, while Tenerife and Gran Canaria are the islands with the lowest presence of holiday homes. An analysis by municipality shows that the top five municipalities according to holiday home intensity belong to the islands of Fuerteventura and Lanzarote, followed by Adeje and Mogán.

Ratio of holiday home beds per 100 inhabitants by islands (August-2022)
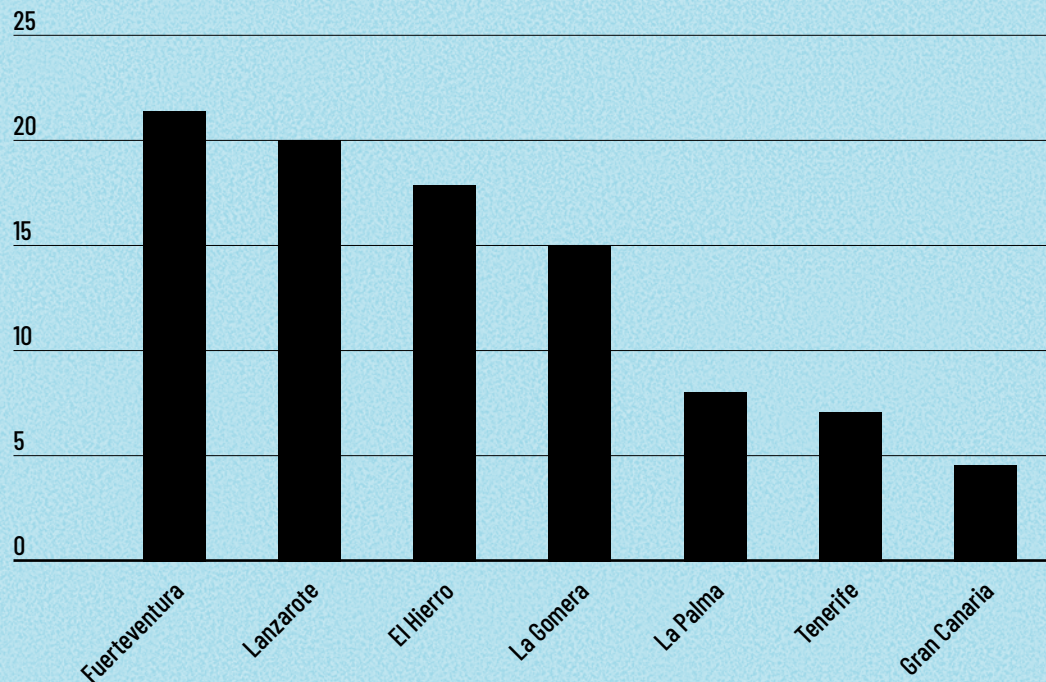
Ratio of holiday home beds per 100 inhabitants by municipality (August-2022)
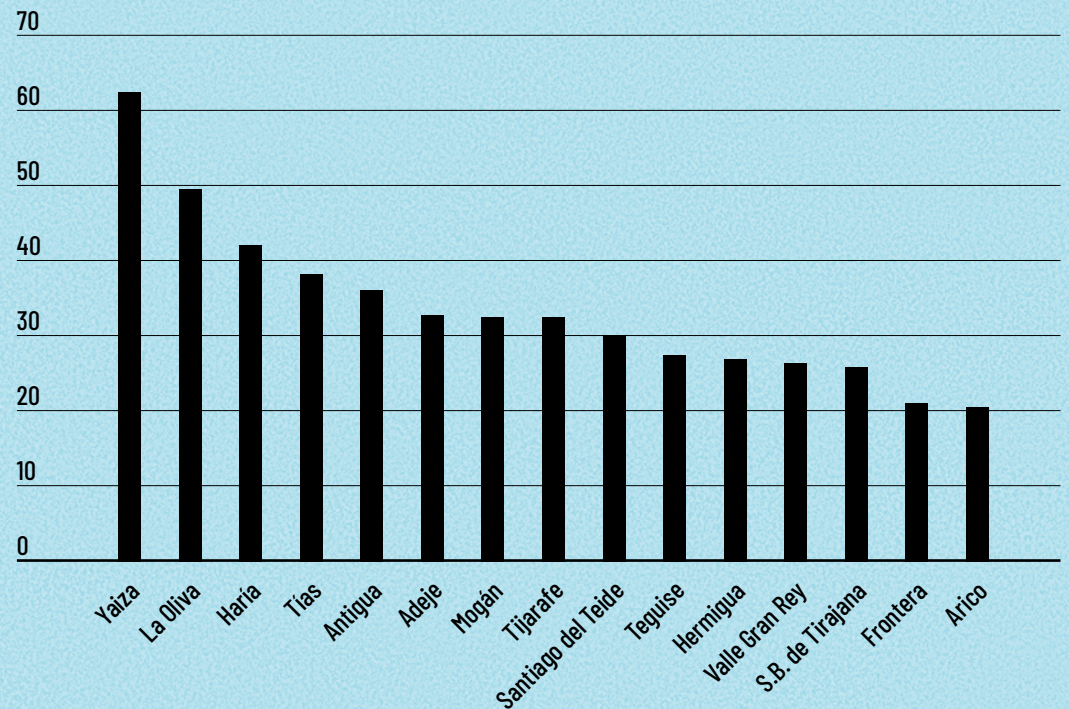
Source: Census of population and housing and Measurement of the number of holiday homes in Spain (INE).

Holiday homes by municipality and micro-destination in the Canary Islands

Holiday home beds by municipality (Oct. 2023)

Legend: ■ Tenerife ■ Gran Canaria ■ Fuerteventura ■ Lanzarote
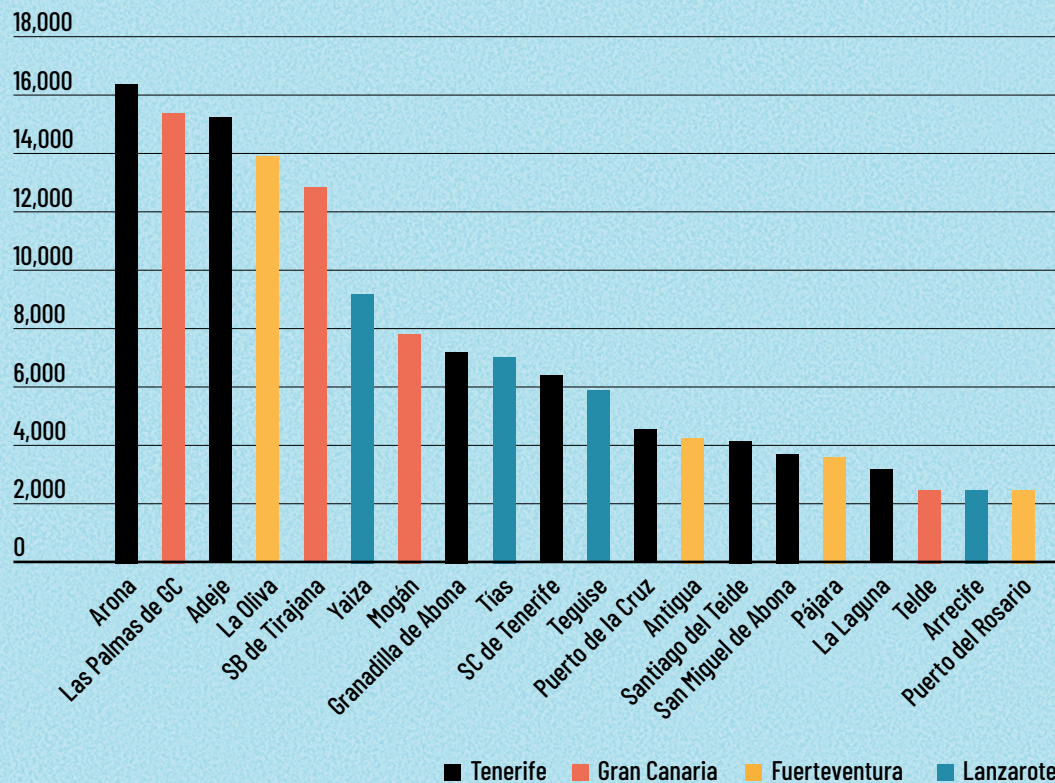
Note: The 20 municipalities with the highest number of holiday homes beds have been included.
Source: General Tourist Register, Government of the Canary Islands (October, 2023).

The 20 municipalities with the highest number of holiday home places have a total of 147,731 places, which is equivalent to 75% of the total number of places in the Canary Islands, which amounts to 195,994.

Holiday home beds by micro-destination (June 2023)

Legend: ■ Tenerife ■ Gran Canaria ■ Fuerteventura ■ Lanzarote
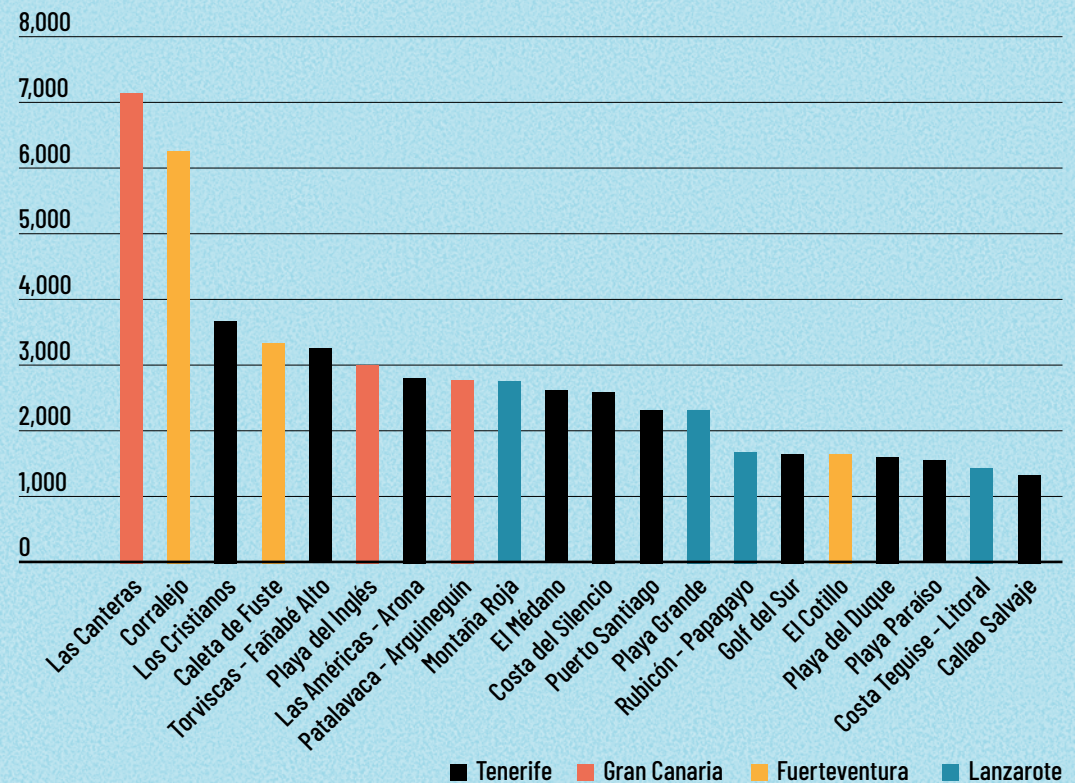
Note: The 20 micro-destinations with the highest number of holiday home beds have been included.
Source: Location of holiday homes (ISTAC), based on the General Tourist Register, Government of the Canary Islands, (June,2023)

The 47 tourist resorts in the Canary Islands account for 45.8% of the total number of holiday homes on the islands.

Population and holiday homes by island and micro-destination in the Canary Islands

Fuerteventura: This island has the highest concentration of holiday homes in the Canary Islands, in relation to the registered population. The highest intensities of holiday homes are in the municipality of La Oliva, specifically in El Cotillo, Corralejo, Caleta de Fuste and Morro Jable. The municipality of La Oliva is the second in the Canary Islands in terms of holiday homes intensity, reaching a figure of 50 holiday home beds for every 100 inhabitants. In towns such as El Cotillo, holiday homes have more beds than hotels and apartments.

Lanzarote: This is the island with the second-highest number of holiday home beds in relation to the registered population. With 3 municipalities, Yaiza, Haría and Tías among the top 5 in the Canary Islands in terms of number of holiday homes. It is important to highlight the case of the municipality of Yaiza, where there are 60 holiday home beds for every 100 inhabitants.

La Graciosa: Despite its small size, it has 639 holiday home beds, mainly located in Caleta de Sebo, which means that the number of holiday home beds is close to that of the island's registered population.

Gran Canaria: This is the island with the lowest number of holiday homes beds in relation to the population. However, it does have some micro-destinations with a significant concentration of population and holiday homes, such as Arguineguín and Taurito. Gran Canaria is the main urban holiday home nucleus in the Canary Islands. Specifically, around the beach of Las Canteras, a micro-destination, concentrates approximately half of the holiday home places in the city of Las Palmas de Gran Canaria. This city has the largest number of holiday home places according to the tourist register of the Government of the Canary Islands, although there were only 8,000 active places in February 2023 according to the INE.

Tenerife: The island has the largest number of holiday home beds in the Canary Islands, with more than 80,000, according to the General Tourist Register. The municipalities with the most beds in holiday homes are Arona, Adeje, Granadilla and Santa Cruz de Tenerife. If we express the number of beds in comparison to the local population, Adeje and Santiago del Teide show the highest ratio. In terms of micro-destinations, those with the most holiday home beds are, in this order, Los Cristianos, Torviscas-Fañabé Alto, Las Américas de Arona, El Médano, Costa del Silencio and Puerto Santiago, according to the General Tourist Register. Some of these micro-destinations, such as El Médano, Costa del Silencio, Los Gigantes and Torviscas-Fañabé Alto have more beds in holiday homes than in hotels or apartments.

La Palma: The supply of holiday homes on La Palma is significant in comparison to other islands. In fact, it is an island that has approximately 50% of its accommodation on offer in this type of accommodation. The municipality of Tijarafe stands out. The volcanic eruption destroyed a significant number of holiday homes.

La Gomera: The island has a total of 3,494 holiday home beds. The municipalities of Hermigua and Valle Gran Rey stand out, where the intensity of holiday home beds reaches a ratio of 27 and 31 vacancies per 100 registered inhabitants.

El Hierro: After Fuerteventura and Lanzarote, it is the island with the highest housing intensity with almost 18 holiday home beds per 100 inhabitants.

Population and tourist accommodation by micro-destination in Lanzarote. 2023

Check out the completereport on tourist accommodation at https://doi.org/10.25145/b.2023.17

This slide and the following ones show the maps with the location of the 47 micro-destinations of the Canary Islands used by the ISTAC in its statistics. These maps show the accommodation units, hotels (in blue) and apartments(in green), with a size proportional to their respective beds. Holiday homes (in yellow) are also represented proportionally to their beds, although holiday home beds located at a distance of less than 100 metres have been grouped together to faci-

litate visualisation. The maps also show (in shades of brown) the census population in the tourist centres by 250x250 metre cells. The more intense this colour, the more census population in each cell.

This combination of information provides strategic information for decision-making, showing the existing pressure in some areas, such as Playa Blanca, Puerto del Carmen or Costa Teguise (Lanzarote); Morro Jable,

Corralejo, El Cotillo or Caleta de Fuste (Fuerteventura); Arguineguín, Puerto Rico or Las Canteras (Gran Canaria); and Los Gigantes, Torviscas–Fañabé Alto, El Médano or Los Cristianos (Tenerife). In these areas, there is a high concentration of tourist accommodation in all three modalities, particularly holiday homes, together with a resident population that in some cases is also numerous.

Yaiza

Costa Teguíse

Puerto del Carmen - Puerto Calero

Source: Location and beds in hotels and apartments (ISTAC). For holiday homes, General Tourist Register, Government of the Canary Islands.

Population and tourist accommodation by micro-destination in Fuerteventura. 2023

Morro Jable
Solana Matorral
Esquinzo-Butihondo

Costa Calma

Caleta de Fuste

El Cotillo (Izq)
Corralejo (Dcha)

Source: Location and beds in hotels and apartments (ISTAC). For holiday homes, General Tourist Register, Government of the Canary Islands.

Population and tourist accommodation by micro-destination in Gran Canaria. 2023

Mogán Turístico

Puerto de Mogán – Taurito

Las Canteras

Maspalomas | Playa del Inglés | San Agustín

Source: Location and beds in hotels and apartments (ISTAC). For holiday homes, General Tourist Register, Government of the Canary Islands.

Population and tourist accommodation by micro-destination in Tenerife. 2023

Puerto de la Cruz

Costa del Silencio - Golf del Sur

El Médano

Los Gigantes - Puerto Santiago

Callao Salvaje, Playa Paraíso, Adeje Turístico

Los Cristianos, Las Américas, Costa Adeje, Torviscas-Fañabé Alto
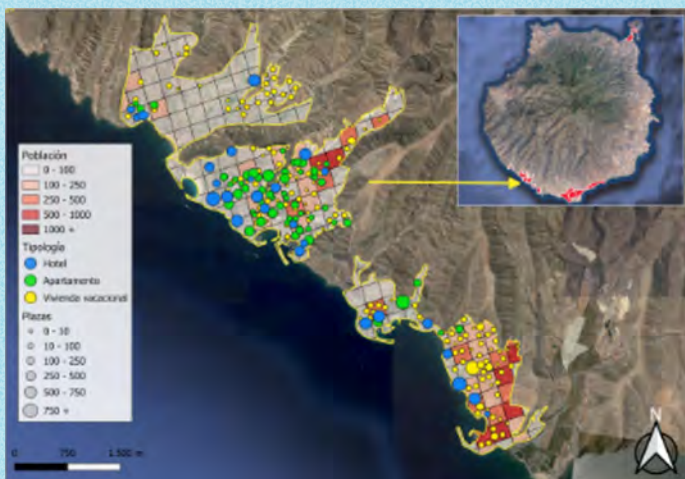

Source: Location and beds in hotels and apartments (ISTAC). For holiday homes, General Tourist Register, Government of the Canary Islands.

The impacts of holiday homes

Holiday homes cannot be viewed as a positive or negative phenomenon; they are a disruptive phenomenon in international tourism whose impacts differ considerably from one area to another, even within each island or municipality. In some places, their more positive aspects may prevail, while in others the exact opposite may be true.

Holiday homes contribute to broadening and diversifying the offer, adapting to certain customer segments that prefer this type of accommodation. Moreover, they can contribute to a distribution of rents across the territory because ownership and location tend to be more dispersed than in other types of accommodation. Holiday home customers tend to be more active and to consume outside the accommodation, as opposed to trends such as all-inclusive in the hotel sector. However, holiday homes may jeopardise tourism and spatial planning objectives. For decades, attempts have been made in the Canary Islands, with varying degrees of success, to accommodate the growth in supply and demand for accommodation, including through a tourism moratorium, but this type of accommodation makes it difficult to control supply because, in principle, any holiday home can enter the market.

Holiday homes can add flexibility to the supply of tourist accommodation in a destination, as they allow for quick entry and exit from the market to adapt supply to demand conditions, for example, during holiday periods. This flexibility is not available in other types of accommodation.

However, holiday homes, like any fast-growing economic activity, is unleashing speculative strategies on the part of economic agents. Holiday homes are progressively being controlled in many destinations by large landlords who dominate the market, limiting some of their positive effects, such as their potential for redistribution of rents or values associated with authenticity. It is important to consider that holiday homes involve the placing on the market of assets that are linked to a constitutionally recognised right, access to housing.

The tourism sector in the Canary Islands is, in general, highly professionalised, with accommodation companies that in some cases are of significant size, as opposed to the micro-SMEs that predominate in the archipelago in most sectors. This professionalisation contrasts with the generally less professional nature of some holiday homes. This lower professionalisation may favour more authentic experiences for the client, although it may also lead to a decline in the quality of service. Equally, holiday homes are becoming a stimulus for the residentialisation of apartment complexes, breaking the principle of unity of operation. This is why there is an urgent need for a regulation that clarifies whether and under what conditions the transformation of tourist apartments into holiday homes or the conversion of residential buildings into holiday homes is to be promoted or limited.

In the Canary Islands, holiday homes are generating a model of dispersed tourist accommodation that contradicts or complements, depending on how you look at it, the traditional model of territorial specialisation. This poses a challenge for the maintenance of the rural landscape, the provision of basic services, coexistence and mobility. In terms of employment, holiday homes tend to generate more precarious and/or submerged employment, with workers not being subject to the hotel and catering trade agreement. Along these lines, this type of accommodation competes under favourable conditions regarding the requirements and regulations that tourist accommodation in hotels and apartments must comply with in terms of quality, environmental and security standards. This is also valid for taxation, since the fulfilment of tax obligations has been lower in the case of holiday homes.

Holiday homes are, in some areas, creating tensions in the residential housing market, leading to a shortage of residential rental housing, particularly around tourist areas, which is particularly suffered by those working in the sector. In addition, holiday homes have become a source of new conflicts between permanent and temporary residents in residential buildings. Last but not least, holiday homes have internationally become a focus of conflict in urban areas because of their effect on quality of life, community life, identity and prices in certain neighbourhoods.

Traffic intensity. Vehicle fleet.

Mobility problems generated by traffic congestion are one of the most important problems being experienced by residents in the Canary Islands. These problems are not easy to solve, nor are they only related to tourism, but they must be taken into account in a global strategy for sustainable tourism. The number of vehicles per 1,000 inhabitants, which is growing in the islands and higher than in other regions, is a symptom of a problem that needs to be addressed. Although tourists are not the main cause of the problem, the mobility needs of workers and goods caused by tourism are an important aspect to consider. Traffic congestion problems are affecting the quality of life of the local population and the satisfaction of visitors. If the Canary Islands are committed to a diversified tourism model with a wide range of outdoor and spatially dispersed activities, the problems of island mobility must be put at the centre of the debate.

Number of vehicles in circulation in the Canary Islands per 1,000 inhabitants
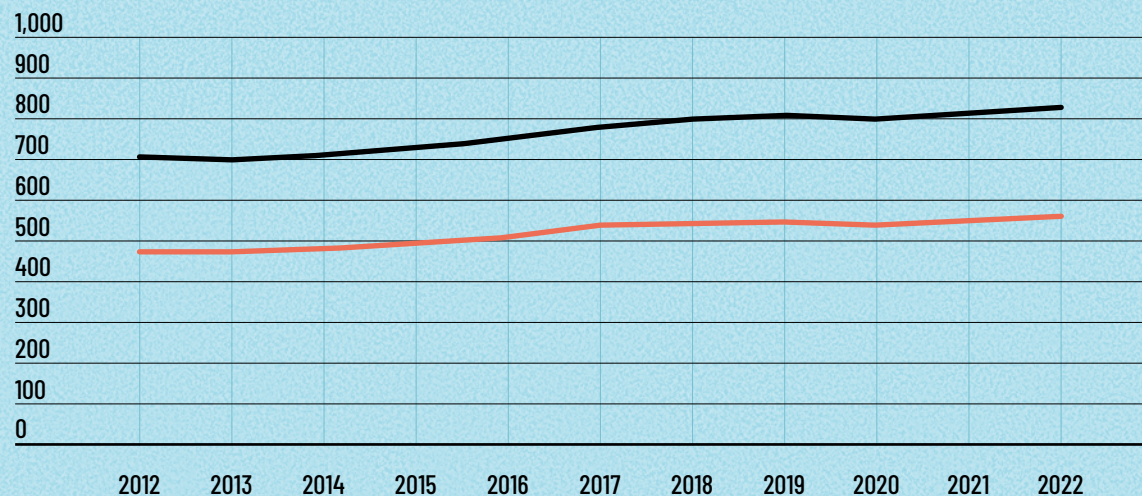
Fuente: Estadística de Parque de Vehículos (ISTAC)

- ■ Vehicles per 1,000 inhabitants
- ■ Passenger card per 1,000 inhabitants

Vehicle fleet in circulation by islands in 2022 per 1,000 inhabitants
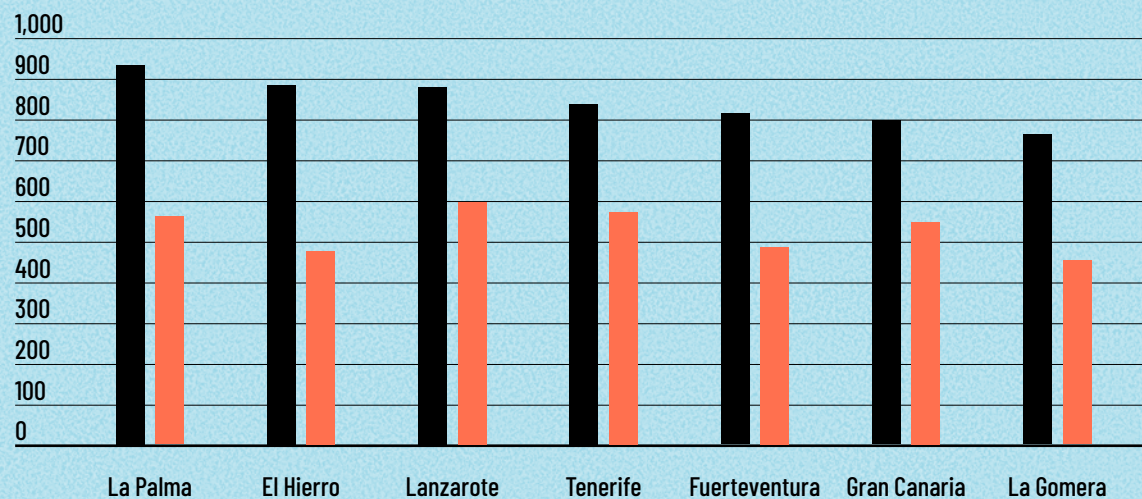
Fuente: Estadística de Parque de Vehículos (ISTAC)

- ■ Vehicles per 1,000 inhabitants
- ■ Passenger card per 1,000 inhabitants

Vehicle fleet in circulation per 1,000 inhabitants (2022)
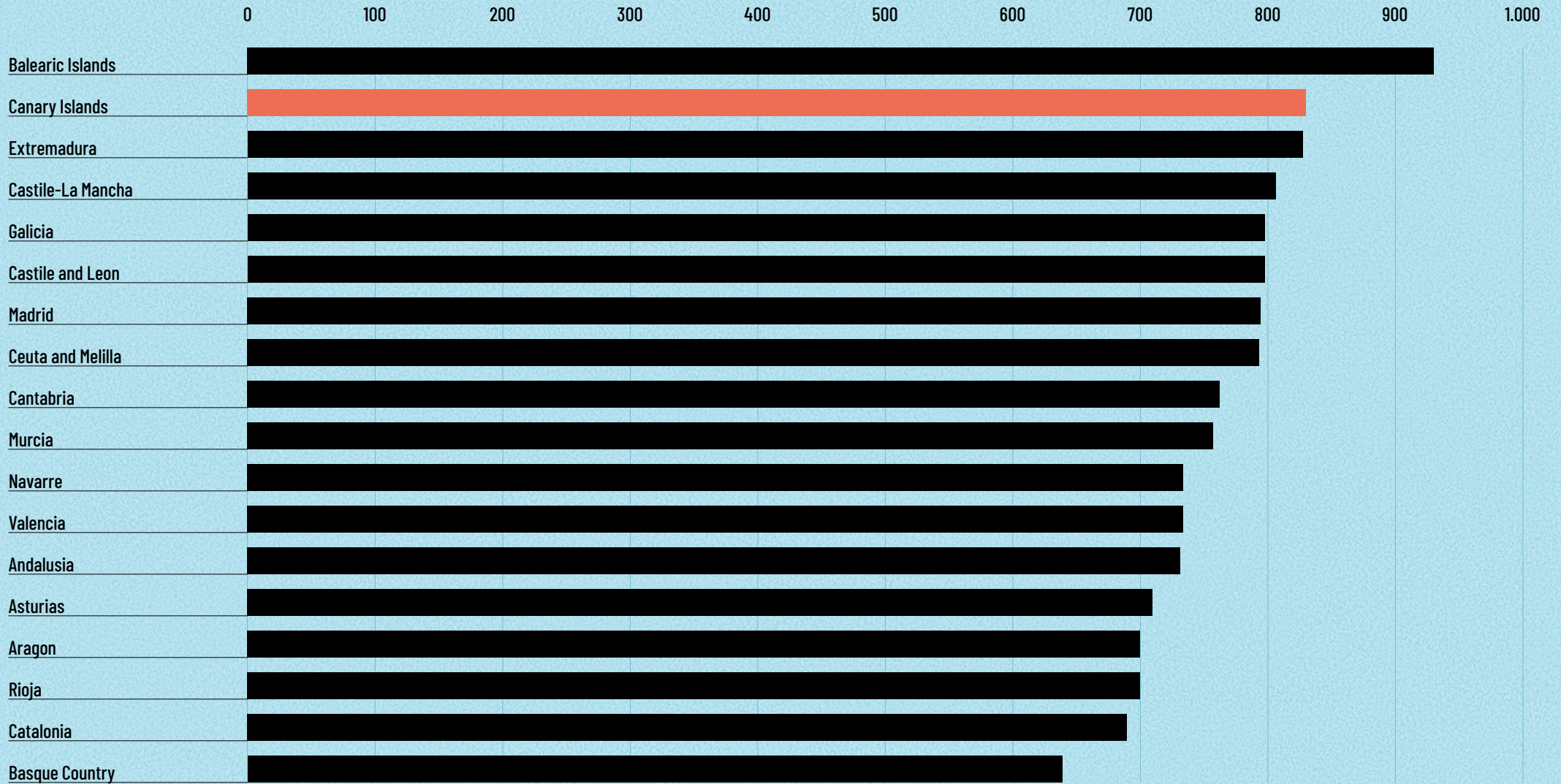
Source: Prepared by the authors with data from the General Statistical Yearbook 2022 of the DGT and the Register of Inhabitants of the INE.

Checklist of main indicators of issue area 13:
Mass tourism and overtourism

Indicator	Availability	Source	Remarks
Ratio of accommodation places to surface area	Available	Accommodation Survey (ISTAC), data on surface (ISTAC) & General Tourist Register (Government of the Canary Islands)	Total accommodation places including hotels, apartments and holiday homes
Ratio of accommodation places to official inhabitants	Available	Accommodation Survey (ISTAC), data on surface (ISTAC) & General Tourist Register (Government of the Canary Islands)	Total accommodation places including hotels, apartments and holiday homes
Willingness to choose sustainable options when booking a trip	Available	Tourist Expenditure Survey (ISTAC)	
Perception of sustainability measures	Available	Tourist Expenditure Survey (ISTAC)	
Willingness to spend extra to reduce their carbon footprint	Available	Tourist Expenditure Survey (ISTAC)	

4.14 Maturity of the destination and renewal

Generally speaking, there are no sustainability indicators referring to the urban-tourist space and from official sources that allow for an adequate measurement and monitoring of tourism regeneration of destinations. The data that are available are scattered and often not up to date.

Tourism regeneration should be seen as a process which requires continuous monitoring to enable the incorporation, if necessary, of certain preventive measures or even to consider a reorientation in planning. However, in those cases where an evaluation is carried out, this is usually done a posteriori and mainly considering the degree of implementation of such interventions.

It is important to introduce new perspectives that take into account aspects such as externalities generated or social impacts.

The investment earmarked for planned interventions in public spaces for mature tourist areas on the Canary Islands coast in 2021 amounted to 1,199,779,410€, which means an average of 2,913.1€ per accommodation place.

With regard to the renovation of private spaces (tourist accommodation and facilities), there are a series of urban incentives from Law 6/2009 on urgent territorial planning measures for the revitalisation of the sector and the organisation of tourism: the increase in the intensity of use or buildability and the reduction in the standard density of tourist land.

From an academic perspective, the ReinvenTUR research group (Tourism Renovation Observatory of the ULL) has addressed the process of tourism renovation on the island of Tenerife:

From a sample of 32% of the island's accommodation establishments, it was observed that 44% of the tourist places had already been renovated, 37% showed finished phases and 17% had already started the process (Simancas Cruz et al., 2018).

The investment in accommodation renovation between 2012 and 2018 was 339,664,000 €, which means 14,412.08 € per bedplaces, 47.9% in 4-star establishments. This investment was mainly private (91.3%) and,

for the most part, in accommodation belonging to national or international hotel chains (56%).

The renovation actions were carried out mainly in rooms (79.1%), common areas (54.8%) and kitchens (45.2%).

Energy efficiency measures have been incorporated in 39.1% of the establishments. 30.4% of the establishments in the sample have included both energy efficiency and water consumption measures.

As a result of the changes introduced, 44.3% of the establishments noted an improvement in their online reputation.

Maturity and renewal of destination

Some relevant indicators related to the maturity of the destination and the supply of accommodation are as follows:

- Importance of the accommodation offer in the aspects of the choice of the Canary Islands as a tourist destination; for 41.8% of tourists it is a very important factor and for 35.7% it is quite important. In general terms, this is the fifth most relevant factor in the choice of the Canary Islands as a destination, behind only the climate, security, tranquillity and the sea (ISTAC, 2022).
- Average stay of 9.24 days (ISTAC, 2022); 9.13 days (ISTAC, 2019).
- Around 30% of tourists visited the Canary Islands for the first time in 2022 (ISTAC).

Regarding planned investments in public space in coastal tourist areas, the Tourism Modernisation Plans and Increase of Tourist Competitiveness foresee investments of almost €1.2 billion in the Canary Islands in 2021.

It would be essential to have more systematic and comparable data on investments in public space for tourism, in addition to those in private space.

Planned investment in 2021 in public space in the coastal tourist areas of the Canary Islands in accordance with the Tourism Modernisation Plans.

	Coastal tourist area	Investment in public space interventions (in euros)	Average investment per accommodation place (in euros)
Fuerteventura	Corralejo	84,323,989	4,455.9
	Caleta de Fuste	67,855,762	5,318.7
	Costa Calma	28,534,545	2,107.0
	Morro Jable	3,739,346	273.9
Lanzarote	Puerto del Carmen	93,410,256	3,260.1
	Costa Teguise	91,867,461	5,750.3
	Playa Blanca	-	-
Gran Canaria	Maspalomas	108,819,686	893.9
	El Veril	5,991,572	49.2
	Playa Mogán	9,278,858	3,888.9
	Costa Mogán	162,330,886	5,551.7
Tenerife	Puerto de la Cruz	282,631,103	13,262.8
	Puerto Santiago	20,630,156	2,884.9
	Los Cristianos	56,992,916	1,562.7
	Las Américas	45,331,038	-
	Costa Adeje	66,567,324	1,728.8
	La Caleta-Playa Paraíso-Callao Salvaje	15,656,458	1,738.6
	Costa del Silencio-Tenbel	-	-
	Costa de San Miguel	25,006,242	5,525.0
La Palma	Los Cancajos	-	-
	Puerto Naos	30,811,812	1,996.4
TOTAL		1,199,779,410	2,913.1

Source: Simancas et al., (2023 in press) with Gesplan data.

Some indicators related to maturity

Repeat visitors vs. first time visitors

	2019	2020	2021	2022
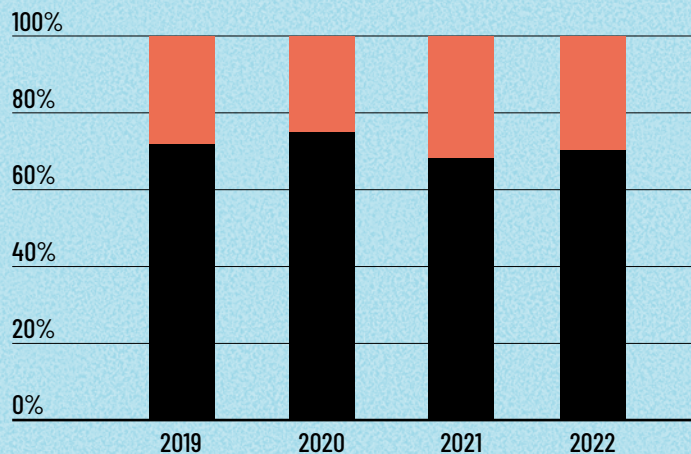
Source: Tourist Expenditure Survey (ISTAC)

■ First time
■ Repeaters

Average stay of tourists (days)

2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
9.56	9.57	9.55	9.36	9.17	9.34	9.13	10.14	9.54	9.24
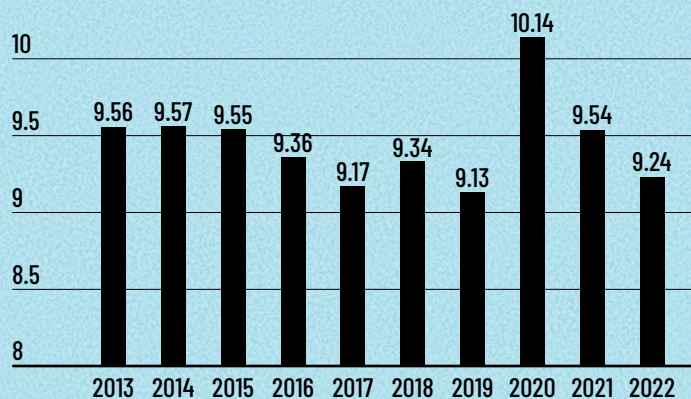
Source: Tourist Expenditure Survey (ISTAC)

Open places in hotels and apartments
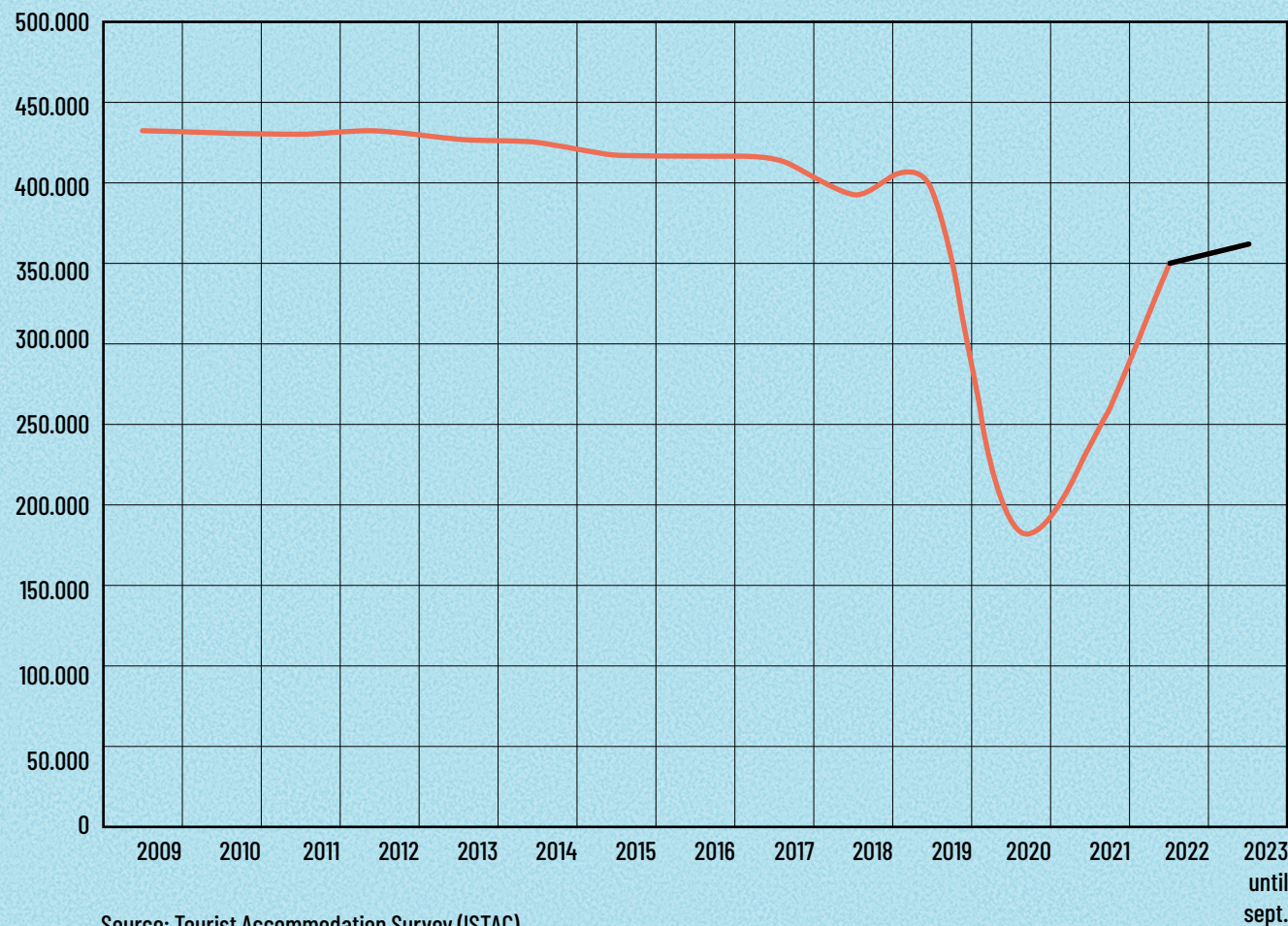
Source: Tourist Accommodation Survey (ISTAC)

Checklist of main indicators of issue area 14:
Maturity of the destination and renovation

Indicator	Description	Availability
Investment in new tourism assets	Construction of new accommodation and tourist facilities	Not available
Investment in tourism renovation	Investment in renovation of private spaces (housing supply and facilities) and public areas	Based on work by ReinvenTUR
Sustainability of the renovation	Sustainability indicators linked to public/private renovation should be included. And, in particular, monitoring indicators in renovation processes	Not available
Renovated tourist bed places	Number of places renewed and year of renewal	Not available From ReinvenTUR's work for Tenerife

Accessibility and inclusivity

There are no data available on accessibility in tourism / accessible tourism in the Canary Islands.

In 2022, the Accessibility Map of Tenerife (Cabildo de Tenerife / SINPROMI), a geo-referenced accessibility document detailing the current state of the island's urban centres as well as the main tourist areas was presented. A total urban area of 19,380 hectares and 661 km of pedestrian routes were analysed.

The map contains analyses of elements such as pedestrian crossings, pavements, urban furniture, ramps, lifts, bus stops, public toilets, etc. The areas are classified according to degree of accessibility and points for improvement are identified. In 2021, the report Observatorio de Accesibilidad Universal en los municipios de España (Hernández-Galán et al., 2021) was also published, showing data of interest for the Canary Islands.

Percentage of routes suitable for independent and safe walking: Canary Islands: 27%; Spain's average: 29% (Hernández-Galán et al., 2021)

Accessibility of infrastructures. Buildings whose use and services are suitable for all people: 10% in the Canary Islands. Spain's average: 17% (Hernández-Galán et al., 2021).

Routes with services and spaces suitable for all people: Canary Islands 30% (Spain average, 13%) (Hernández-Galán et al., 2021).

Roads with adequate space-pedestrian communication, Canary Islands 7% (Spain average 14%) (Hernández-Galán et al., 2021).

In terms of beach accessibility, information is available on the accessibility of 26 beaches and bathing areas in 15 municipalities on the island of Tenerife (SINPROMI, 2022).

Accessibility map of Tenerife

Source: IDECanarias / SINPROMI (2022)

Accessible beaches in Tenerife
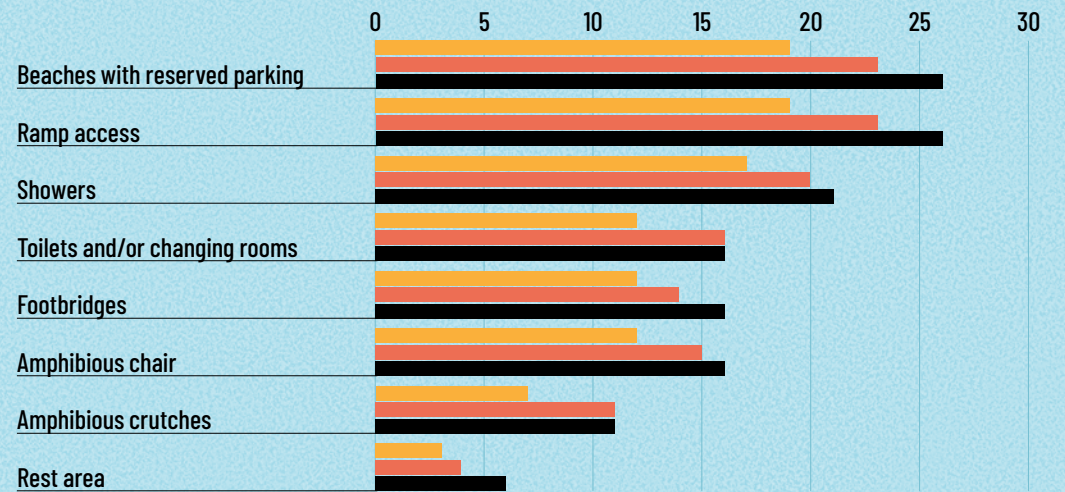
Source: SINPROMI

■ 2020 ■ 2021 ■ 2022

Some indicators related to accessibility

Number of Blue Flag beaches in the Canary Islands

Legend: ■ 2019 ■ 2020 ■ 2021 ■ 2022 ■ 2023

Categories (top to bottom): Tenerife, Gran Canaria, Fuerteventura, Lanzarote, La Palma, La Gomera, El Hierro
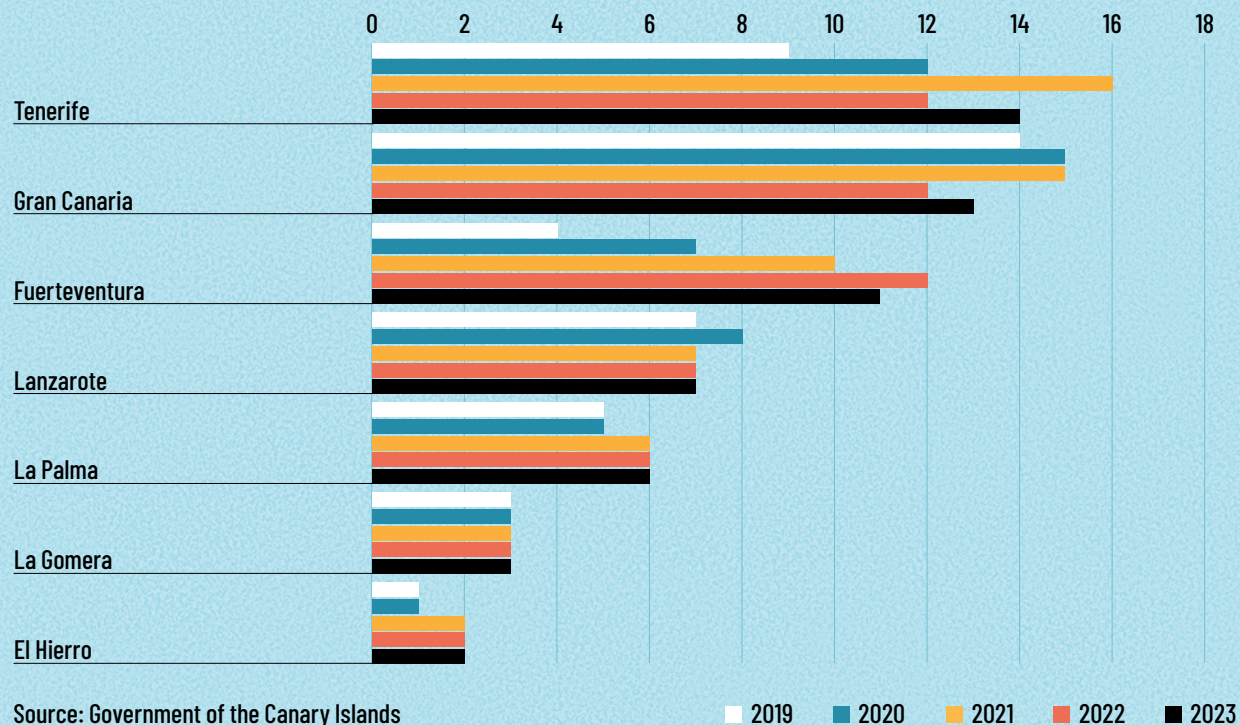
Source: Government of the Canary Islands

In 2023 the Canary Islands received Blue Flag recognition for 56 beaches.

In terms of urban mobility, the Canary Islands is the autonomous region with the highest increase in urban bus transport in the last year (50.8%), according to data from the Passenger Transport Statistics (INE, 2023). This increase is related to the implementation of free public transport for frequent users (residents, young people, more than 65 years old people and people with disabilities).

In 2022, 4% of customers of public transport (bus) in Tenerife are non-residents. The customer satisfaction index is higher among non-resident customers (79) than among residents (70) (Titsa Customer Satisfaction Survey, 2022).

In Europe, the percentage of older people in the total population has increased significantly over the last 10 years and the trend is that it will continue to grow in the future. In 2022, 21.1% of the EU population were aged 65 or older (Eurostat, 2023).

Percentage of population aged 65 or older in different EU countries (markets of interest to the Canary Islands)

Country	2012	2022
Italy	20.8%	23.8%
Finland	18.1%	23.1%
Germany	20.7%	22.1%
France	17.1%	21.0%
Sweden	18.8%	20.3%
Spain	17.4%	20.1%
The Netherlands	16.2%	20.0%
Norway	15.4%	18.2%
Ireland	11.9%	15.0%

Source: Eurostat (2023)

47% of EU residents over 65 years of age who do not travel for tourism state health reasons.

With regard to health care, an issue of special interest for promoting more accessible and inclusive tourism, the Canary Island Health Survey (Government of the Canary Islands, 2021) provides indicators referring to satisfaction with the care received in public or subsidised emergency services. 52.5% of the people attended to in A&E rated the care received as "Good" and 21.3% as "Very good".

In 2022, the "Silver plus" segment (55 or older and 30 or more nights of stay) was 1.2% of the total number of tourists. 83.3% of tourists in this segment are over 60 years of age (Promotur, based on the ISTAC Tourist Expenditure Survey).

EU residents' reasons for not participating in tourism by age group (2019) (%)

- 15 to 20 years
- 25 to 34 years
- 35 to 44 years
- 45 to 54 years
- 55 to 64 years
- 65 years or over
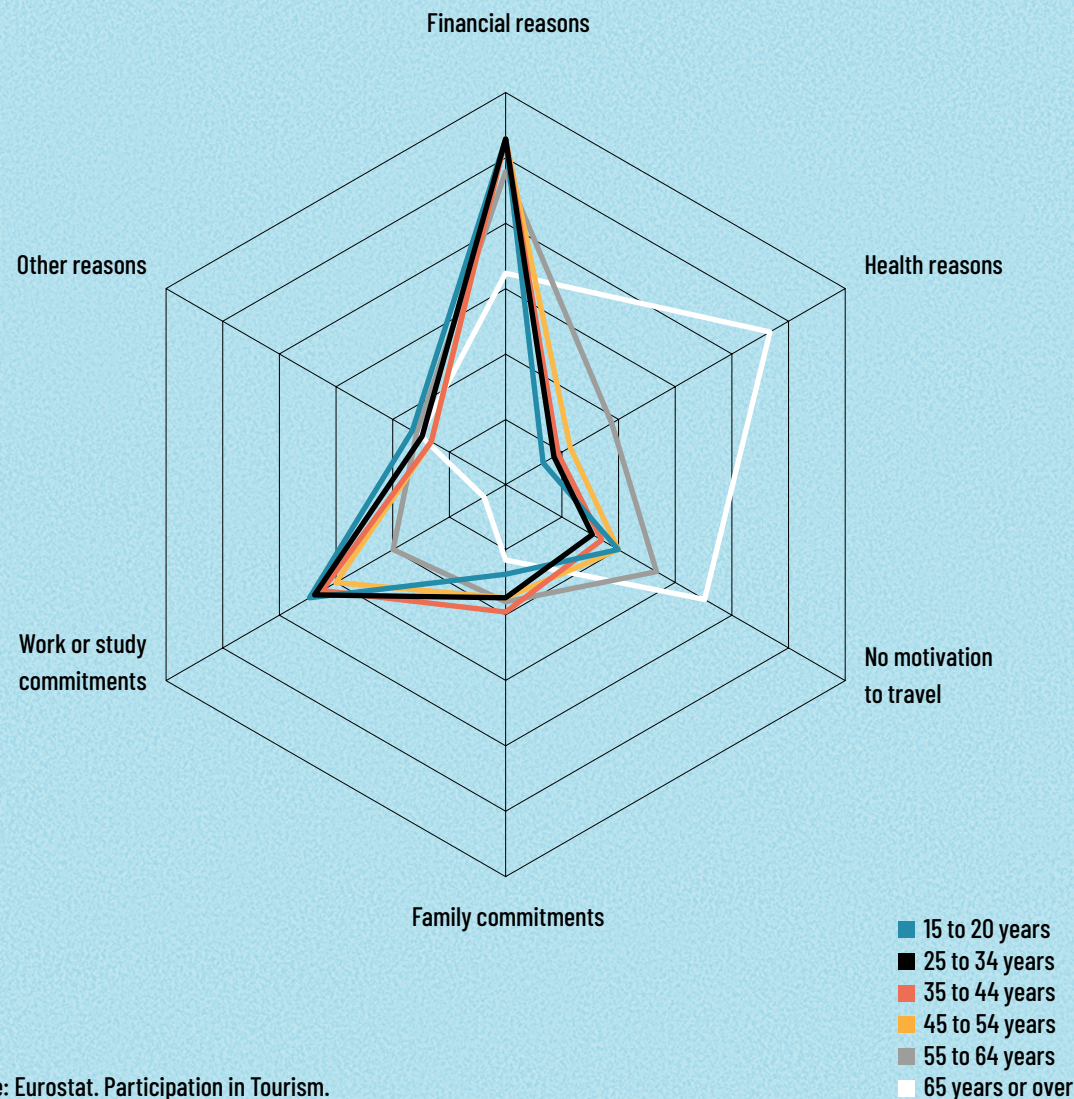
Source: Eurostat. Participation in Tourism.

Activities carried out by tourists in the Canary Islands (2022)
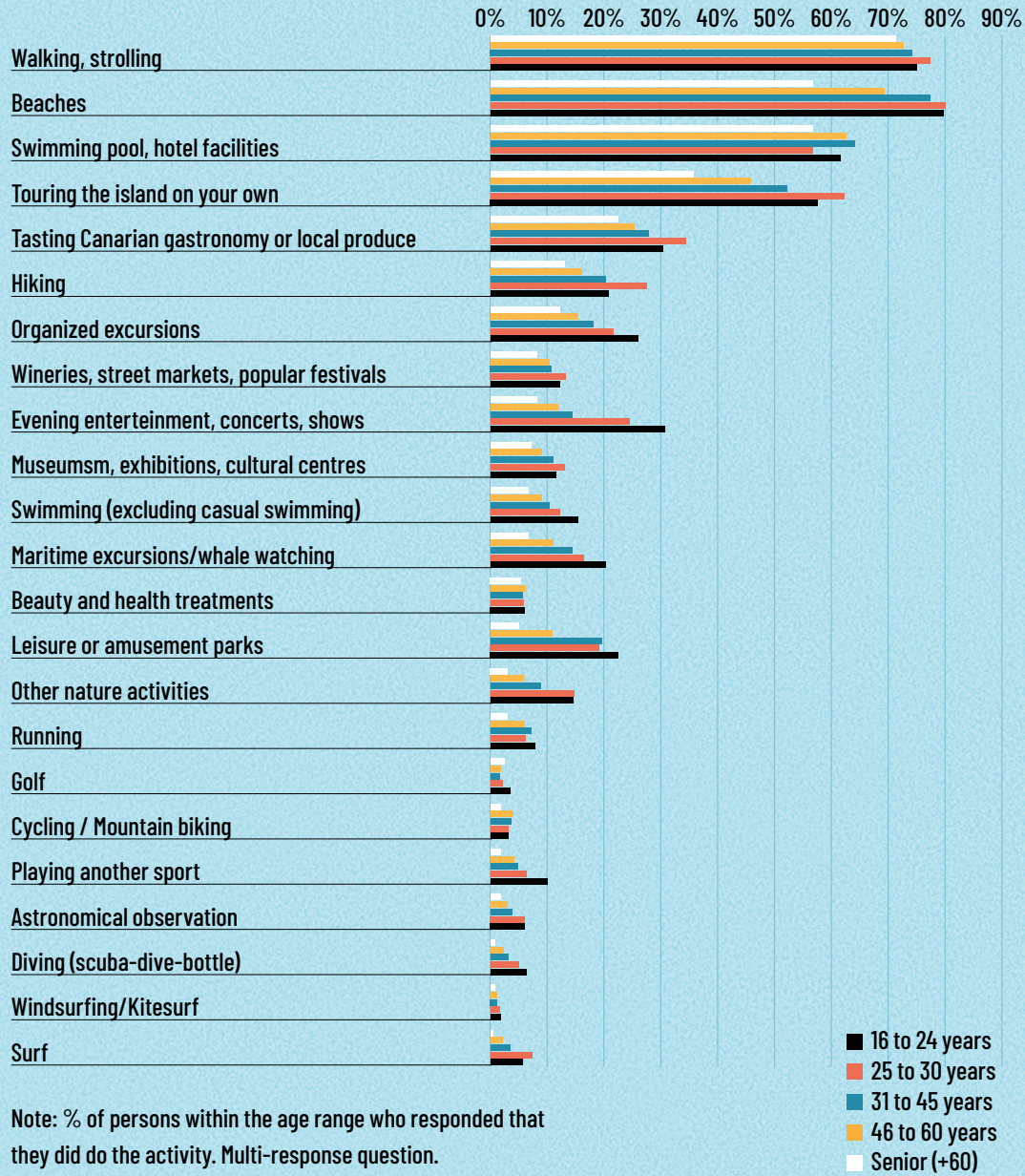
Note: % of persons within the age range who responded that they did do the activity. Multi-response question.
Source: Tourism Expenditure Survey (ISTAC)

Average length of stay in the Canary Islands in 2022 (days): comparison with 2019
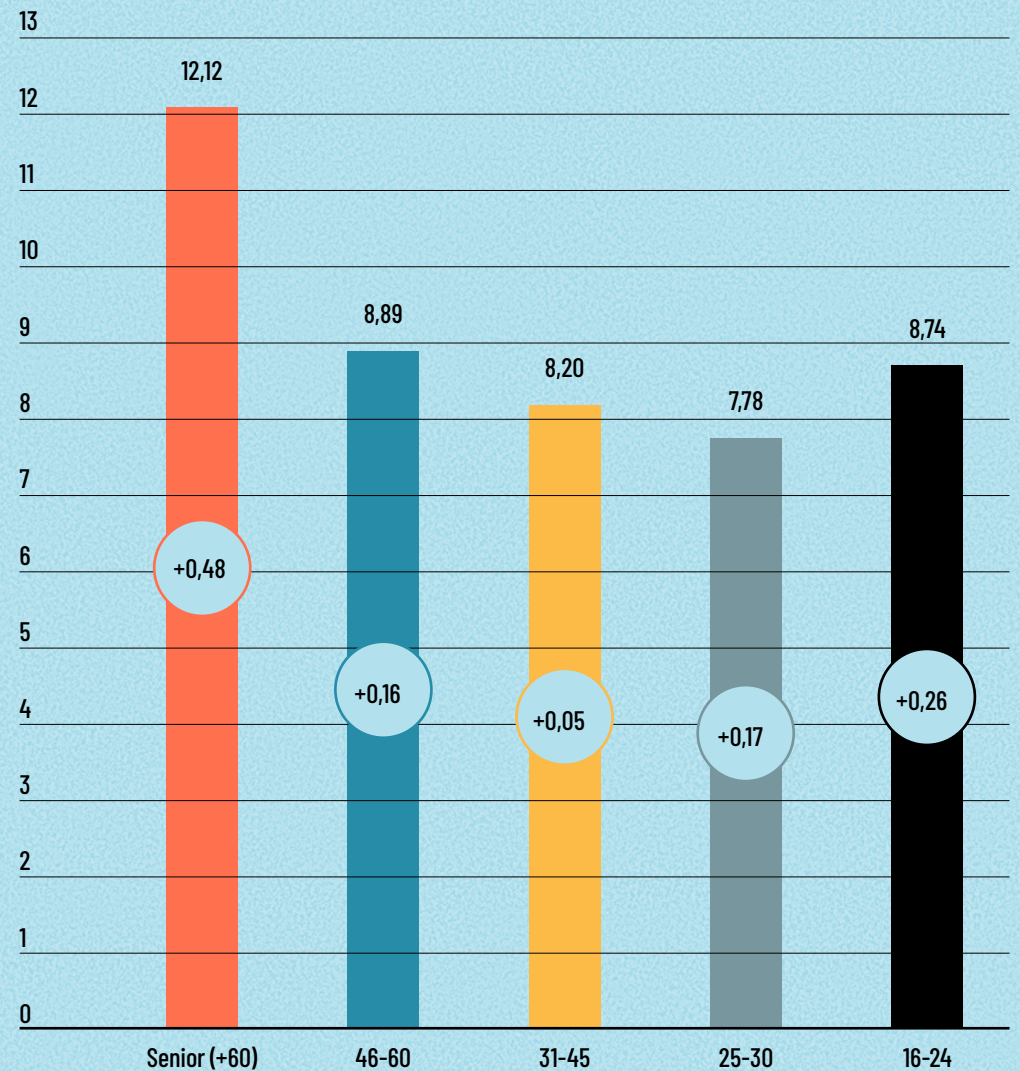
Source: Tourist Expenditure Survey (ISTAC)

Checklist of main indicators of issue area 15:
Accessibility and inclusivity

Indicator	Description	Availability	Source
Local awareness of the importance of accessibility and inclusivity	Level of implementation of accessibility and inclusivity policies	Not available	
Infrastructure accessibility	Share of hotels, public buildings, leisure services and cultural and natural sites with accessible facilities	Occasional data	Hernández-Galán et al., 2021
Transport accessibility	Public transport suitable for mobility challenges and accessible private transport supply	Occasional data	Hernández-Galán et al., 2021
Insured assistance	Local level of health coverage and distance to hospitals or medical facilities	Available	Government of the Canary Islands

4.16 Governance

On 24 October 2022, the Government of the Canary Islands, together with the individual Island Councils, tourism employers and agents of the sector signed the Glasgow Declaration. This adhesion implies the commitment of the tourism sector to reduce CO_2 emissions by 50% in a period of 8 years. Previously, on 27 May of the same year, the Canary Islands Tourism Council had agreed to adhere to the declaration, advocating the decarbonisation of the sector.

Tourism governance is identified with the way in which decisions are taken on collective issues related to tourism, with special attention to aspects such as the degree of stakeholder participation, public-private collaboration, transparency, leadership, etc.

In the area of governance, quantitative information is difficult to obtain. There is no data available on the participation or coordination of the different tourism stakeholders. Generally speaking, there are not enough indicators to allow adequate monitoring of governance in tourism.

One way of checking the functioning of public services in the Canary Islands that are linked to tourism is through the results of the Socio-economic Habits and Confidence Survey – ECOSOC. 54.2% of those surveyed were fairly or very satisfied with the services provided by the Government of the Canary Islands in Tourism. 41.5% were not very or not at all satisfied with these services (ISTAC, 2021).

Public services related to tourism, in any case, have one of the highest ratings by citizens, only behind "Security and emergencies".

Satisfaction with the tourism services of the Canary Islands Government (2021)

- **4%** DK/NA
- **8%** Not at all satisfactory
- **13%** Very satisfactory
- **41%** Quite satisfactory
- **34%** Slightly satisfactory
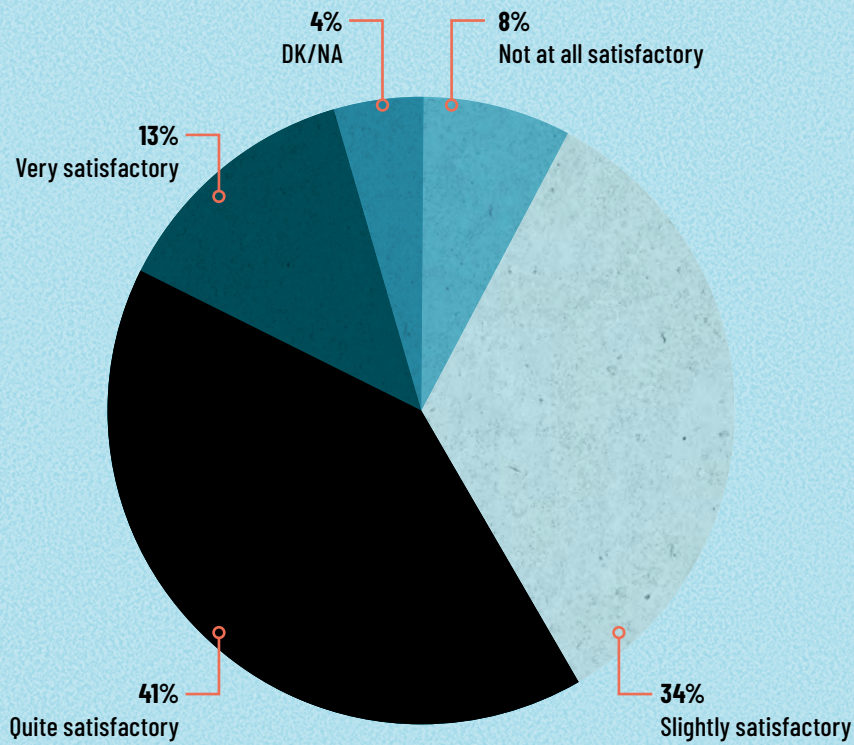
Source: Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC)

Satisfaction with the services provided by the Canary Island Government (2021)

Service	%
Security and emergency	68%
Tourism	57%
Trade	56%
Culture and sports	54%
Transport	54%
Education	53%
Health	48%
Equality	46%
Youth	38%
Justice	38%
Public works	35%
Agriculturem livestock and fisheries	35%
Industry and energy	33%
Social inclusion and the fight against poverty	25%
Employment	16%
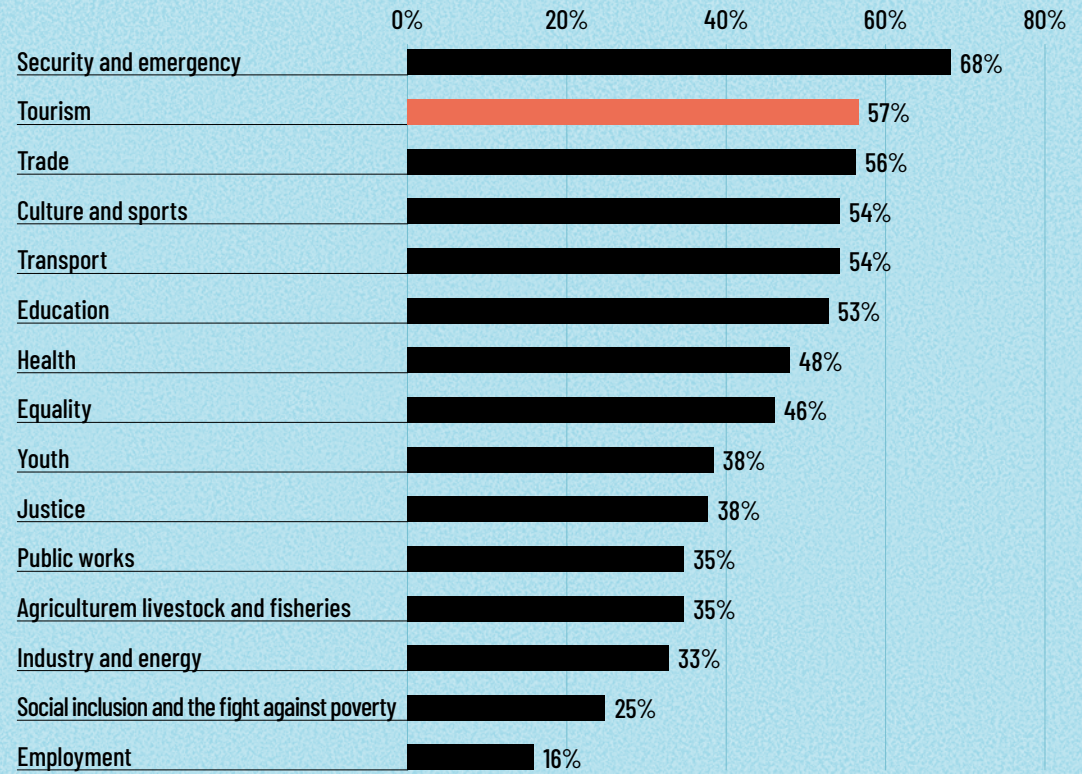
Note: Includes high and moderate satisfaction, excluding NS/NC item.

Source: Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC)

Main problems of the Canary Islands and its citizens

The Canary Islands Sociobarometer (July 2023), published by the UNED at its headquarters in Las Palmas de Gran Canaria, contains questions aimed at finding out the perceptions of the most urgent problems of the Canary Islands and among Canary Island residents. In the case of the Canary Islands, the main problems identified by those surveyed were unemployment (37.1%), the health system (35.2%) and economic problems (27%). These are also indicated as the main problems affecting people personally or the household. The "crisis in the tourism sector" is indicated as one of the main problems in the region by 3.9% of respondents and as one of the main personal or household problems by 1.2% of respondents. Excessive dependence on tourism is one of the main problems of the Canary Islands for 0.3% of respondents and, from a personal or family point of view, for 0.5% of respondents.

Main problems of the Canary Islands requiring a more urgent solution

Problem	%
Unemployment	37.1%
Health system	35.2%
The economic crisis. Problems of an economic...	27.0%
Infrastructures	14.8%
Housing	14.1%
Citizen insecurity	14.0%
Inmigration	13.6%
Problems of a social nature (poverty, aid...)	12.7%
Inflation	8.9%
Street cleaning	7.8%
Taxes	7.5%
Parking and traffic	6.8%
Education	6.0%
Transport	6.0%
Political	4.7%
Crisis of the tourist sector	3.9%
Environmental problems / Climate change	3.1%
Quality of employment: ERTE, salary	2.3%
Primary sector: agriculture, livestock	2.2%
Demography (overpopulation, ageing)	0.8%
Pensions	0.8%
Squatters	0.7%
Crisis of the commercial sector	0.4%
Judicial system	0.4%
Diversifying the economy (dependence on tourism)	0.3%
Drugs consumption	0.2%
Volcano of La Palma	0.2%
Situation of the self-employed	0.1%
Other answers	4.7%
DK/NA	4.3%

Note: Multiple choice (maximum 3 answers) and spontaneous answers
Source: Canary Islands Sociobarometer, 2023 (UNED Las Palmas de Gran Canaria)

Main problems of the Canary Islands requiring a more urgent solution

Problem	%
Health system	31.1%
The economic crisis. Problems of an economic...	24.8%
Unemployment	23.3%
Inflation	14.6%
Citizen insecurity	13.7%
Infrastructures	12.4%
Problems of a social nature (poverty, aid...)	11.3%
Housing	10.5%
Street cleaning	9.2%
Taxes	9.0%
Parking and traffic	8.6%
Inmigration	5.1%
Environmental problems / Climate change	4.3%
Transport	4.0%
Education	3.7%
Quality of employment: ERTE, salary	1.9%
Pensions	1.7%
Political	1.6%
Crisis of the tourist sector	1.2%
Primary sector: agriculture, livestock	1.2%
Squatters	0.7%
Diversifying the economy (dependence on tourism)	0.5%
Situation of the self-employed	0.4%
Judicial system	0.4%
Volcano of La Palma	0.1%
Crisis of the commercial sector	0.1%
Demography (overpopulation, ageing)	0.1%
Drugs consumption	0.1%
Other answers	3.9%
None	0.8%
Don't know	3.9%
No answer	2.7%

Note: Multiple choice (max. 3 answers) and spontaneous answer.
Source: Canary Islands Sociobarometer, 2023 (UNED Las Palmas de Gran Canaria)

Assessment of the Public Administration's performance

In terms of assessing the performance of the Public Administration in aspects of interest to tourism:

- Environmental Protection: 48.1% of respondents rate the performance of the Public Administration as not very or not at all satisfactory. 48.2% of respondents considered it to be fairly or very satisfactory.
- Urban planning and housing: 73.8% rate the performance of the Public Administration as unsatisfactory or not at all satisfactory.
- Water supply and public lighting: 57.3% rate the performance of the Public Administration as fairly or very satisfactory. Hospital services: 54.1% rate the performance of the Public Administration as fairly or very satisfactory.
- Police services: 60.8% rate the performance of the Public Administration as fairly or very satisfactory (ISTAC, 2021).

In terms of citizen participation, 11.8% of those surveyed belong to or participate in an association in the Canary Islands. Regarding the degree of interest in participating in possible public projects in the Canary Islands, 52.9% of those surveyed showed a fair amount or a great deal of interest in contributing ideas prior to the start of the project. 55.7% showed a fair amount or a great deal of interest in voting on the development of the project or regulation (ISTAC, 2021).

Percentage of population according to their assessment of the performance of the public administration in the Canary Islands (2021)
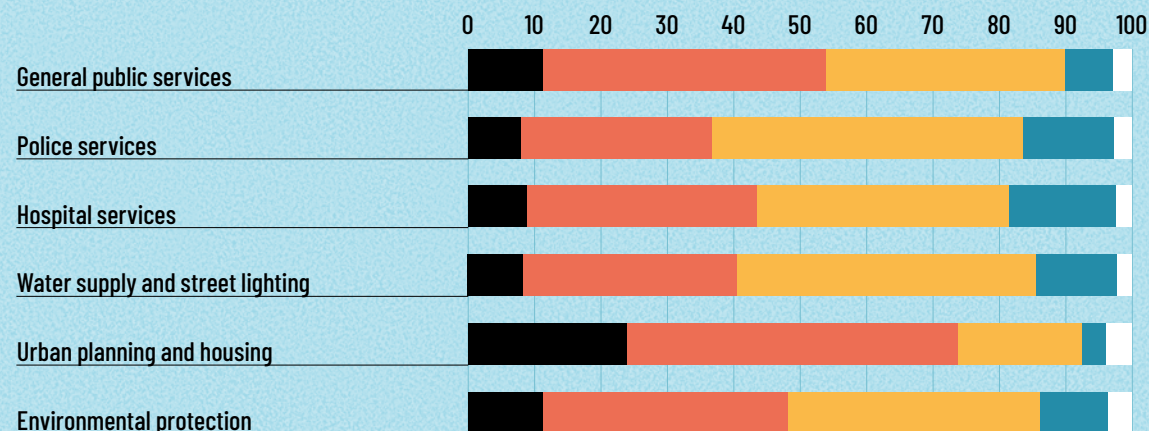
Source: Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC)

Legend:
- Not at all satisfactory
- Slightly satisfactory
- Quite satisfactory
- Very satisfactory
- Doesn't know / No answer

Checklist of main indicators of issue area 16: Governance

Indicator	Description	Availability	Source	Remarks
Government effectiveness	It reflects the perception of the quality of public services involved in the areas in the tourism system, the quality and preparedness of policy formulation and implementation, as well as the credibility of the public administration.	Partly available / occasional	Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC). Public Administrations and Citizen Participation	Indicators from statistical sources are needed.
Participation	It reflects the level of inclusion of the different interest groups in the decision-making process of the tourism system of the territory, measured through the mechanisms of representative and informal organisation, the perception of effectiveness, etc.	Partly available / occasional	Socioeconomic Habits and Confidence Survey - ECOSOC (ISTAC). Public Administrations and Citizen Participation	Indicators from statistical sources are needed.
Communication and accountability	It reflects the means and quality of communications between stakeholders, including the different levels of public administration; the fulfilment of commitments made according to levels of responsibility; the existence of efficient mechanisms for the promotion of training, employment, gender equality and innovation.	Not available		

5

In conclusion

In the coming years, tourism management in the Canary Islands will require numerous strategic decisions, which must be based on an integrated information system that favours decision-making based on evidence and rigorous data. This document has tried to shed light on the situation of tourism sustainability, highlighting both the good and bad points, but there is still much to be done, mainly in two areas. The first is the development of indicators and the collection of new data. The second is the collaboration of public agents, businesses and citizens in establishing a system of management of tourism information for decision-making that places the Canary Islands at the forefront of the international measurement of tourism sustainability. The Canary Islands have one of the best statistical systems on tourism in the world, as can be seen in the context of the World Tourism Organisation's INSTO network of Tourism Sustainability Observatories.

The paper has outlined some of the issues that need to be focused on, in some cases in the short term and in others in the medium term: Wastewater management; solid waste management; land use and landscape protection; decarbonisation and climate change commitments; sustainable mobility and transport bottlenecks; the use of renewable energies; the expansion of holiday rentals; coordination between administrations; public-private coordination; anticipation of energy zeros; water management to avoid future supply problems; housing prices, especially around tourist areas; quality of employment in tourism; the perception of tourism by the resident population; tourist congestion in certain areas; managing the effects of climate change, such as recurrent episodes of haze, heat waves and fires; accessibility and inclusiveness for traditionally excluded social groups; quality tourism training, favouring entrepreneurship and skilled jobs; the implementation of smart destinations; taking advantage of the digitalisation of the value chain; increasing negotiating capacity vis-à-vis intermediaries and platforms; improving the territorial and social distribution of the benefits of tourism; favouring product innovation to generate memorable experiences for our visitors; increasing efficiency in processes; promoting the rational use of natural spaces; promoting the renovation of public and private infrastructures in destinations, etc.

It is not just about measuring the sustainability of tourism, but about using rigorous methodologies, focusing measurement on what really matters and acting on the evidence. We hope that this document can help public and private stakeholders in the archipelago to understand better and have more data on the different dimensions of tourism sustainability. We trust that this will encourage a calm and rigorous debate that will allow us to address the tourism challenges facing the archipelago in the coming decades.

The Observatory's role is to provide as much information as possible with the utmost rigour and transparency, and to this end, we will use this report, the website we are developing and other instruments to disseminate information through social networks. In a mature society, the conclusions in terms of what to do and what is the highest priority are the responsibility of all agents, public, private and citizens as a whole. The residents of the Canary Islands are, in short, the potential beneficiaries of the decisions taken today on the basis of the existing data, and they also have the responsibility to contribute to this process.

Canary Islands, November 2023. The research team.

6

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List of abbreviations

ADR. Average daily rate. Tarifa media diaria.

AROPE. At Risk Of Poverty and Exclusion (Personas en Riesgo de Pobreza y/o Exclusión).

DGT. Dirección General de Tráfico. Traffic Spain.

EUROSTAT. Oficina Europea de Estadística. Statistical Office of the European Union.

FRONTUR. Estadística de movimientos turísticos en frontera.

GEI. Gases de efecto invernadero. Greenhouse gas.

ISTAC. Instituto Canario de Estadística. Canary Islands Institute of Statistics.

IMPACTUR. Estudio de impacto económico del turismo (Exceltur y Gobierno de Canarias). Study on the economic impact of tourism (Exceltur and the Canary Islands Government).

INE. Instituto Nacional de Estadística. National Institute of Statistics.

INSTO. Red Internacional de Observatorios de Turismo Sostenible. International Network of Sustainable Tourism Observatories.

IPVA. Índice de Precios de la Vivienda en Alquiler. Rental Housing Price Index.

OMT. Organización Mundial del Turismo. United Nations World Tourism Organisation.

PIB. Producto Interior Bruto. Gross Domestic Product.

PROMOTUR. Promotur Turismo Canarias, S.A.

RevPAR. Ingreso por habitación disponible. Revenue per Available Room.

SINPROMI. Sociedad Insular para la Promoción de las Personas con Discapacidad, S.L. Island Society for the Promotion of People with Disabilities.

TIC. Tecnologías de la Información y las Comunicaciones. Tecnologías de la Información y las Comunicaciones.

Informe 2023

Sostenibilidad del Turismo en Canarias

Observatorio Turístico de Canarias

UNWTO · INSTO | World Tourism Organization International Network of Sustainable Tourism Observatories

Gobierno de Canarias
Consejería de Turismo y Empleo

Cátedra de Turismo CajaCanarias-Ashotel
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ULPGC Universidad de Las Palmas de Gran Canaria | Instituto Universitario de Turismo y Desarrollo Económico Sostenible

Tides