Tourism Observatory of the Canary Islands

Canary Islands Tourism Sustainability. Progress Report 2022

Gobierno de Canarias
Consejería de Turismo, Industria y Comercio

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

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Económico Sostenible

Tides

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This document has been prepared by a research team of the University of La Laguna (ULL) and the University of Las Palmas de Gran Canaria (ULPGC) in the context the cooperation agreements signed by both universities with the Ministry of Tourism, Industry and Commerce of the Canary Islands. These agreements lie within the framework of the membership of the Tourism Observatory of the Canary Islands to the International Network of Sustainable Tourism Observatories (INSTO) of the United Nations World Tourism Organization. On 21 October 2020, the annual Global INSTO meeting confirmed the Canary Islands as a new member of the network.

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Universidad de La Laguna

ULPGC Universidad de Las Palmas de Gran Canaria

Contents

1. Executive Summary

The Canary Islands joined the UNWTO International Network of Sustainable Tourism Observatories in October 2020.

The Tourism Observatory of the Canary Islands aims to promote the sustainability of the destination, improving the measurement and supervision of key indicators. The monitoring sustainability will provide support for better decision-making on destination management.

1. Tourist arrivals 6.7 mill. (2021); 4.6 mill. (2020) and 15.1 mill. (2019). In 2021, 79% of tourists came from abroad and 21% from mainland Spain (FRONTUR).

2. The region in EU which had the highest number of nights spent in tourist accommodations in 2019 (96.1 million nights) (Eurostat, 2021).

3. 80% of local population agree with the statement authorities should keep promoting tourism as the main economic sector (ISTAC, 2019).

4. High unemployment rate (around 20% in 2018 and 2019), among the highest in Spain and Europe (ISTAC). It is one of the Spanish Autonomous Regions and European Regions with the highest AROPE rate (At Risk of Poverty and/or Exclusion): 36.3% (INE, 2020).

5. The Canary Islands, one of the communities with the lowest expenditure per inhabitant in R&D activities: €98. Spain, €328.6 (INE, 2020).

6. Absence of pronounced seasonal pattern. The peak season is the winter. Maximum total tourism expenditure in a quarter (2019): Q4 €4,216 mill. (ISTAC).

7. Average rating 8.7/10 of tourist experience in the Islands (ISTAC, 2019).

8. 17% of the energy produced in Canary Islands in 2020 comes from renewable sources (Anuario Energético de Canarias).

9. There is no official regional estimation of water consumption by tourism on an annual and homogeneous basis.

10. The waste from tourism remains hidden behind residential waste flows as both sources of waste are collected jointly.

11. The Canary Islands, due to their dependence on fossil fuels, have a high GHG emission rate.

12. Lack of information on the coordination and cooperation among agents of the destination, being and area to improve..

13. Dependence on airlines and main European tour operators. 56% of the tourists who arrive in the islands have bought a tourism package (FRONTUR, 2019).

14. 68% of tourists are willing to spend extra to reduce their carbon footprint (ISTAC, 2022).

15. Supply and demand are highly concentrated in the territory. 47 tourist micro-destinations representing 1.7% of the territory generate 89.3% of overnight stays in hotels and apartments.

16. Average annual growth of private tourism investment of 8.5% in the period of 2015-2019 (IMPACTUR, 2020).

17. The network of Canary Island Protected Areas is made up of 146 protected areas (40% of the total territory) (Government of the Canary Islands).

18. Lack of information and specific indicators on accessibility and tourism.

2. Canary Islands in brief

Archipelago: 8 islands in the Atlantic Ocean

Outermost Region of the European Union

Autonomous region of Spain.

Located **1,300 km** away from mainland Spain and about 100 km from the African coast.

The Canary Islands are the largest of the five archipelagos of Macaronesia and also the most easterly.

Surface: 7,447 km²

Population: 2,172,944 (INE, 2021)

Tenerife and Gran Canaria are the two most populated islands and together account for around 82% of the total population.

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

▸ **Mild climatic conditions:** average temperature during the day in winter is 22.1ºC and 26 ºC in the summer season.
▸ **Volcanic origin:** The Canary Islands are a volcanically active archipelago. Recent eruption on the island of La Palma in 2021.
▸ **Environmental richness and wide variety of habitats:** Almost half of the Canary Islands territory (46.74%) corresponds to o territory protected by the European Union's network of conservation areas, the Natura 2000 Network. Among the 15 richest regions in biodiversity on the planet. Recognized as a hotspot of world biodiversity.
▸ **Contrasting landscape:** Lanzarote and Fuerteventura, the easterly islands are more arid; whereas the more westerly are mountainous islands with more diverse landscapes.

The role of tourism in the destination

Tourism is the main economic activity on the islands with around 15 million inbound tourists. United Kingdom (33%), Germany (17%), the rest of Spain (13%) and Nordic countries (10%) are the main countries of origin (ISTAC, 2019). Average expenditure by tourist: € 1,122.58 (ISTAC, 2019).

The main reasons for choosing the Canary Islands are climate, security and tranquillity (ISTAC, 2019).

Leadership in tourism figures among European regions. The highest number of nights spent in tourist accommodation in 2019 (96.1 million).

Since the 1960s, tourism has experienced rapid growth. **Mass tourism model supported by international tour operators.**

The main attractions of the Canary Islands are its **climate and landscapes.**

Absence of a marked seasonal pattern as one of the most characteristic feature of the Canary Islands tourism model.

The Canary Island tourism model is strongly **based on resources** and **not supported sufficiently by intelligence and knowledge.**

High volume of tourism and dependence on environmental resources.

Weakness of economic impacts on well-being (e.g. high rates of unemployment)

Complex destination governance: the Canary Islands need greater coordination between institutions and departments and between public and private interests.
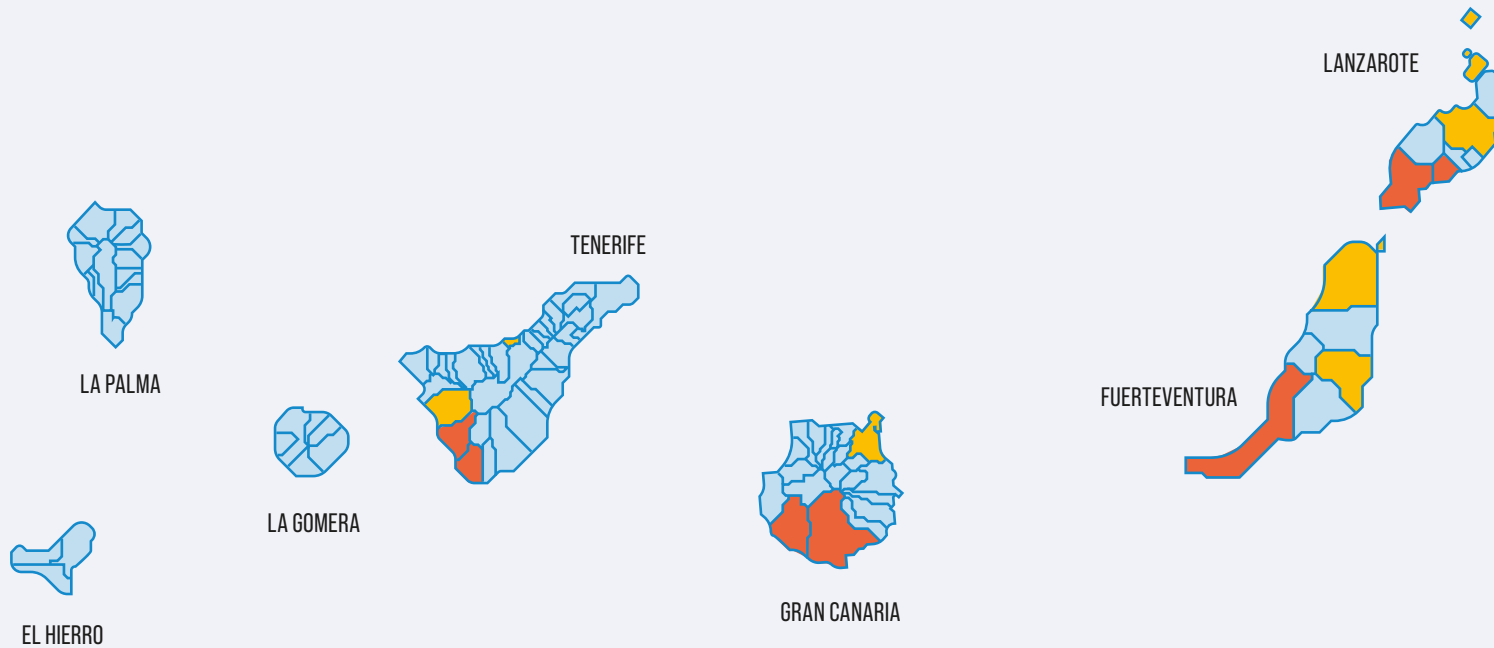
Concentration of overnight stays in the main tourism municipalities of the Canary Islands (July 2022)

SOURCE: ISTAC

■ 100,000-500,000 OVERNIGHTS   ■ OVER 500,000 OVERNIGHTS

LANZAROTE

TENERIFE

LA PALMA

FUERTEVENTURA

LA GOMERA

EL HIERRO

GRAN CANARIA

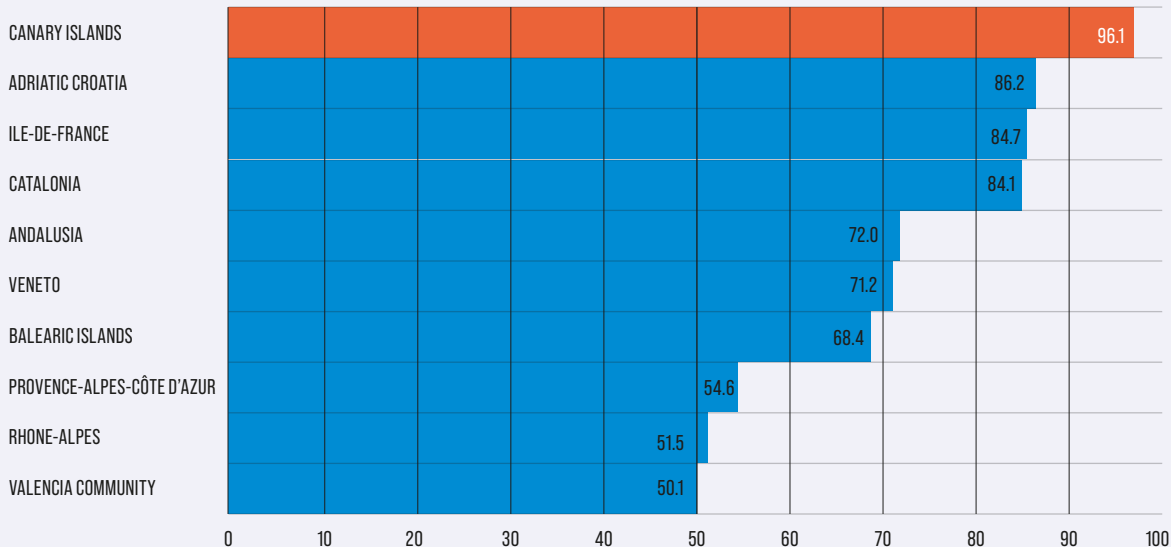14 out of 88 municipalities account for 94.2% of overnights in hotels and apartments (July, 2022)

7 out of 88 municipalities showed over 500,000 overnights (July, 2022). These municipalities account for 72.9% of overnights in hotels and apartments.

In July 2022, overnights in hotels and apartments in the Canary Islands were 6.6% lower than pre-pandemic figures (July 2019).
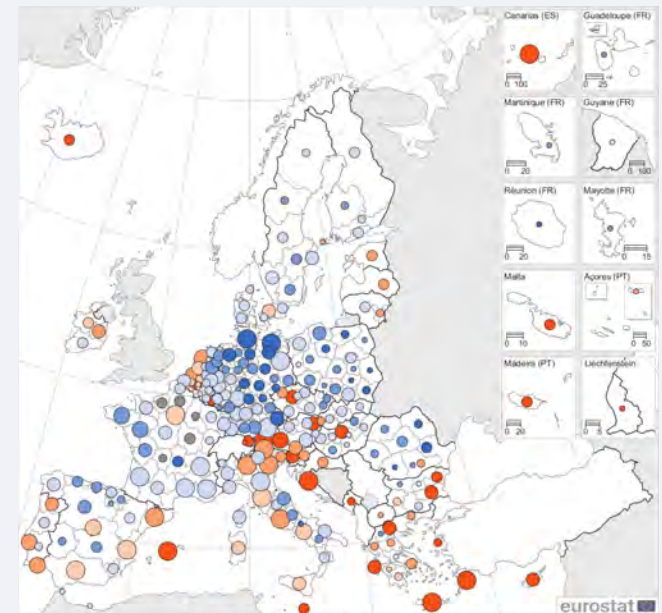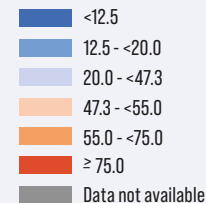
Relevance of the destination in the EU context

Nights spent in tourist accommodations by origin (2019)

SOURCE: EUROSTAT   NOTE: GREECE 2018, MONTENEGRO 2017

EU regions with the highest number of stays in tourist accommodations (million nights, 2019)

SOURCE: EUROSTAT

Region	Value
CANARY ISLANDS	96.1
ADRIATIC CROATIA	86.2
ILE-DE-FRANCE	84.7
CATALONIA	84.1
ANDALUSIA	72.0
VENETO	71.2
BALEARIC ISLANDS	68.4
PROVENCE-ALPES-CÔTE D'AZUR	54.6
RHONE-ALPES	51.5
VALENCIA COMMUNITY	50.1

Share of international tourists in total nights spent (%) EU=47,3

- <12.5
- 12.5 - <20.0
- 20.0 - <47.3
- 47.3 - <55.0
- 55.0 - <75.0
- ≥ 75.0
- Data not available

Total nights spent (million) EU=2.875

- <2.5
- 2.5 - <5.0
- 5.0 - <10.0
- 10.0- <20.0
- 20.0 - <30.0
- ≥ 30.0
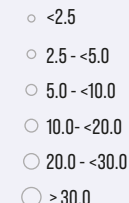
Administrative boundaries: © EuroGraphics © UN-FAO © Turkstat
Cartography: Eurostat - GISCO, 06/2021

0   200 400 600 800 km

Context of the Tourism Observatory of the Canary Islands

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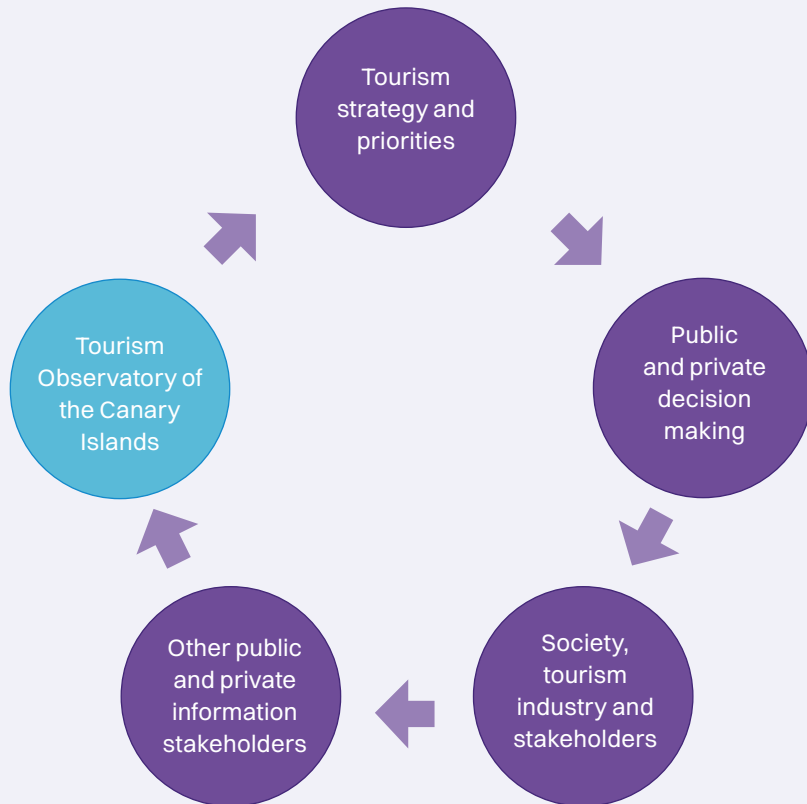
Structure of the Tourism Observatory of the Canary Islands

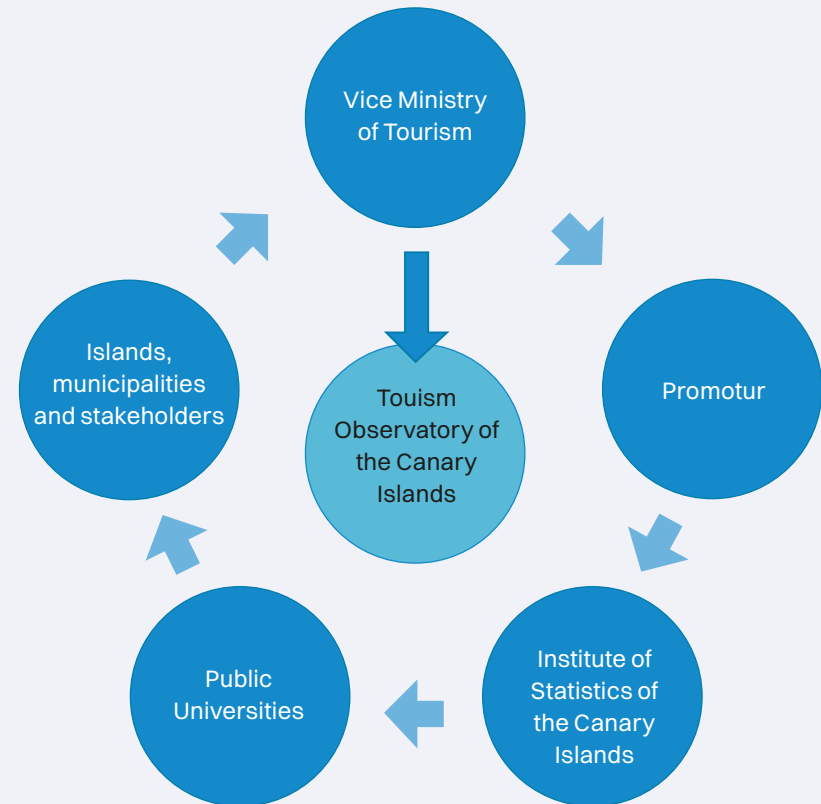Design of the Tourism Observatory of the Canary Islands

3. The Impact of COVID-19 on tourism in the Canary Islands

Tourist arrivals 2019 vs. 2021

SOURCE: ISTAC (FRONTUR)

■ 2019   ■ 2021

	TENERIFE	GRAN CANARIA	LANZAROTE	FUERTEVENTURA	LA PALMA
2019	5,889,454	4,272,615	3,065,575	2,023,196	343,680
2021	2,762,750	1,789,513	1,188,784	1,024,015	161,172
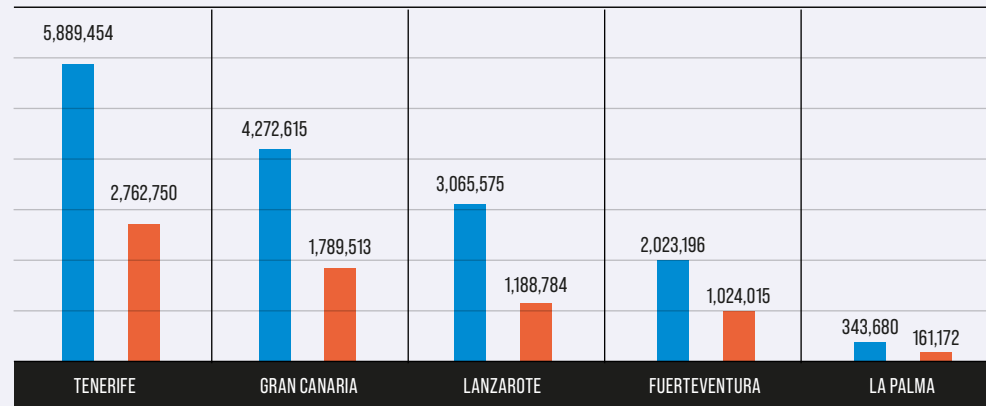
Percentage drop in tourist arrivals (2019-2021)

SOURCE: ISTAC (FRONTUR)

LANZAROTE	GRAN CANARIA	LA PALMA	TENERIFE	FUERTEVENTURA
-61%	-58%	-53%	-53%	-49%
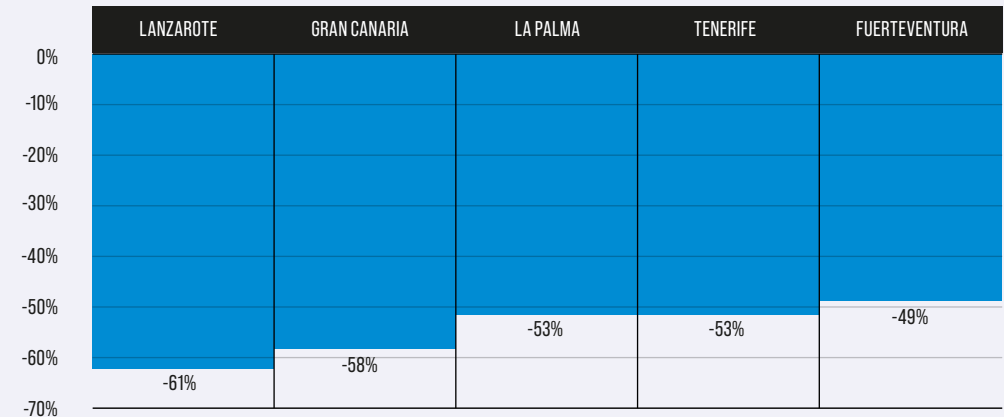
Tourist arrivals in the Canary Islands (main countries) (2019)

SOURCE: ISTAC (FRONTUR)

13%
MAINLAND SPAIN

10%
NORDIC COUNTRIES

3%
ITALY

3%
BELGIUM

2%
SWITZERLAND

17%
GERMANY

27%
OTHERS

7%
OTHER COUNTRIES

33%
UNITED KINGDOM

4%
FRANCE

4%
NETHERLANDS

4%
IRELAND
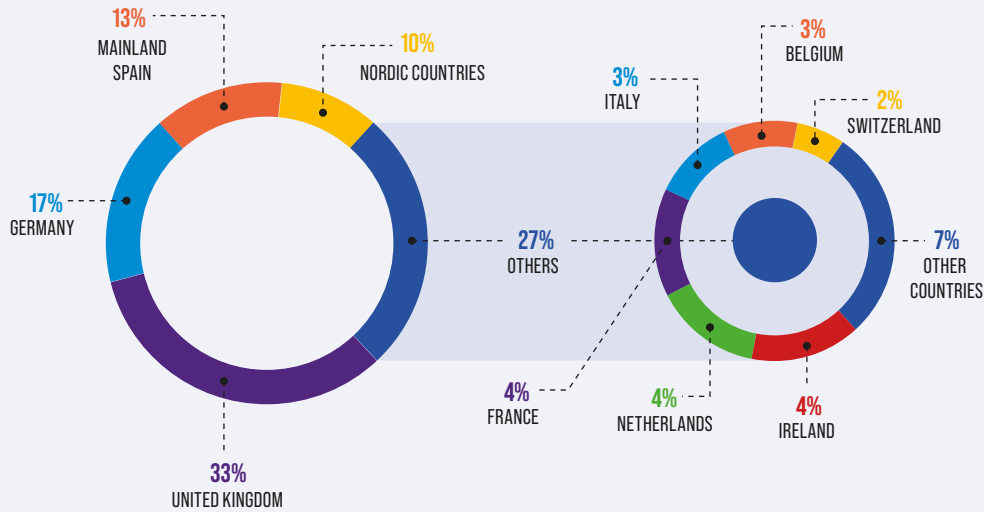
Tourist arrivals in the Canary Islands (main countries) (2021)

SOURCE: ISTAC (FRONTUR)

19%
UNITED KINGDOM

7%
NORDIC COUNTRIES

4%
ITALY

4%
BELGIUM

3%
IRELAND

1%
SWITZELAND

19%
GERMANY

34%
OTHERS

10%
OTHER COUNTRIES

21%
MAINLAND SPAIN

5%
NEETHERLANDS

7%
FRANCE
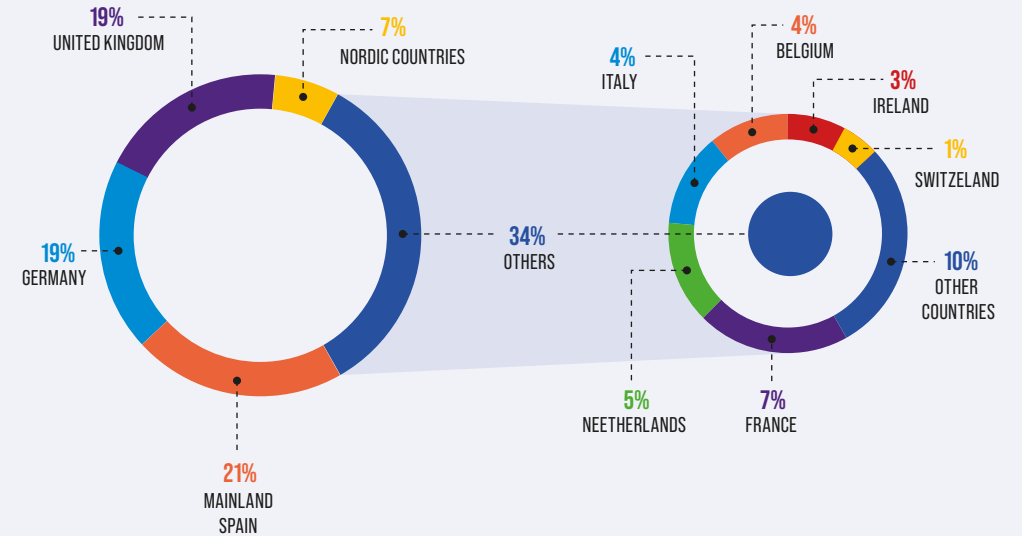
Tourism impact of COVID-19 in the Canary Islands

Indicator	Before COVID-19	During COVID-19		Source
	2019	2020	2021	
Tourism GDP	33% (Spain: 12.4%)	17.8% (Spain: 5.5%)	n.a.	IMPACTUR (Exceltur y Gobierno de Canarias)
Average Expenditure				
Daily by tourist	€137.45	€135.31	€143.98	ISTAC (Tourism expenditure survey)
By tourist trip	€1,122.58	€1,169.81	€1,205.98	
Accommodation (hotels and apartments)				
Available bed places	395,016	190,092	236,547	ISTAC ((Accommodation survey)
Annual overnights	97,964,361	29,252,005	40,204,828	
Occupancy rate (by room)	77.44%	49.83%	53.64%	
ADR/RevPAR	€85.17 / €65.96	€88.44 / €43.98	€97.20 / €52.13	
Average length of stay	7.45	7.04	6.39	
Tourist Arrivals				
International (value and % annual change)	13,147,474	3,818,966 (-71%)	5,278,731 (+38%)	ISTAC (FRONTUR)
Mainland Spain (value and % annual change)	1,968,234	812,839 (-59%)	1,418,435 (+75%)	
Total (value and % annual change)	15,115,708	4,631,805 (-69%)	6,697,166 (+45%)	

Evolution of tourist arrivals using the year 2010 as rate 100

SOURCE: OMT / INE (FRONTUR) / ISTAC (FRONTUR)

■ WORLD ■ SPAIN ■ CANARY ISLANDS
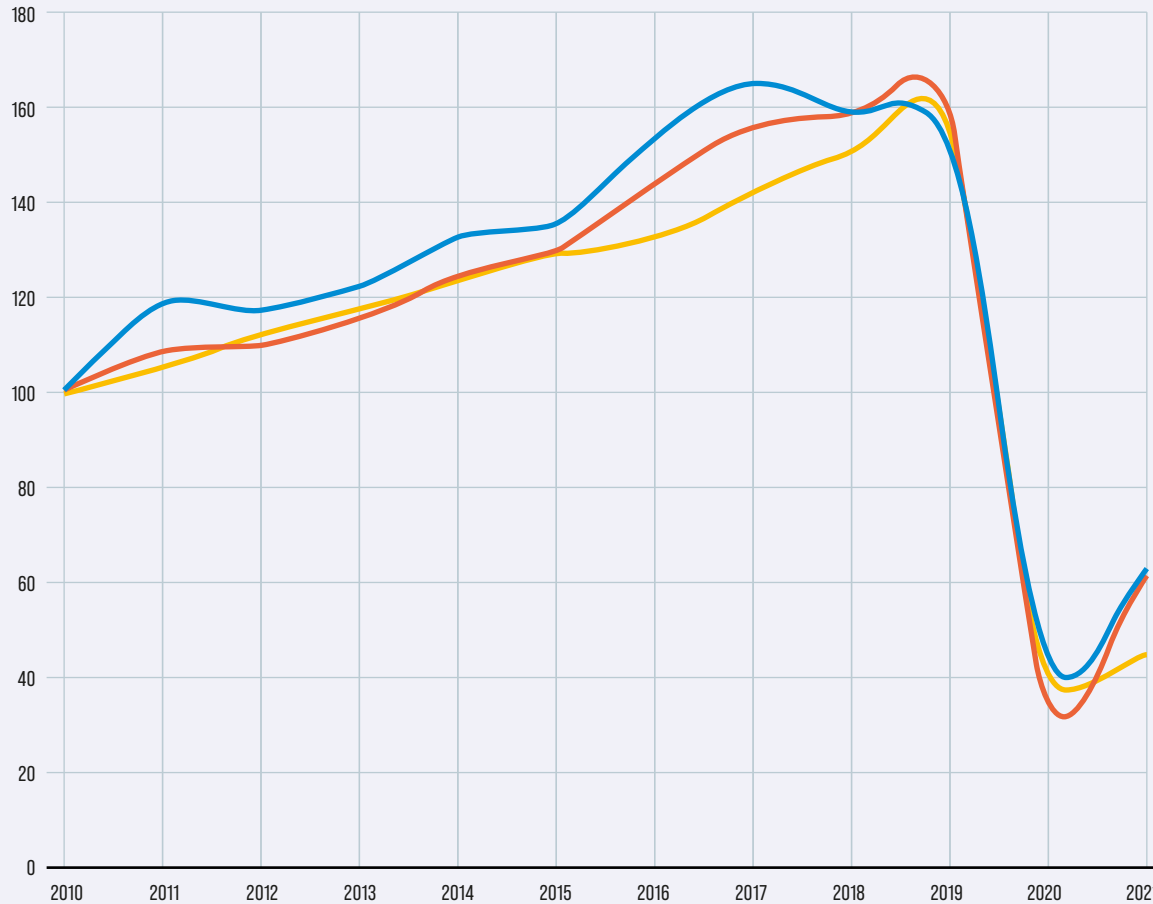
Percentage variation in aggregate tourist spending in comparison with the same period in 2019

SOURCE: ISTAC (ENCUESTA SOBRE GASTO TURÍSTICO)
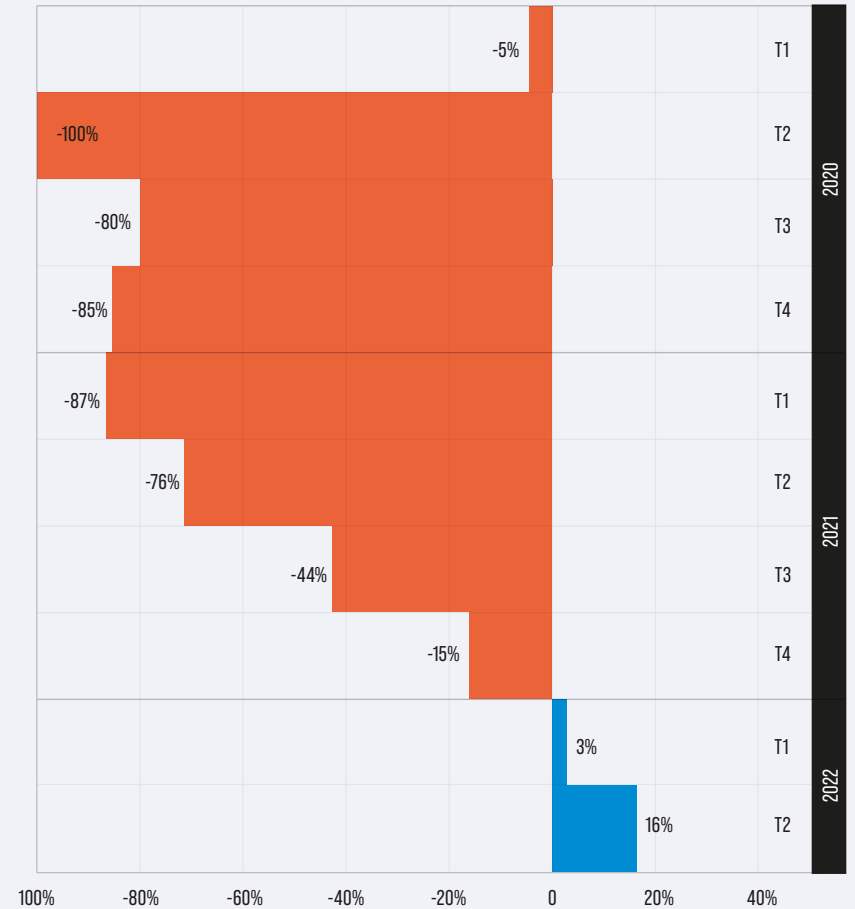
International tourist arrivals in the Canary Islands (Jan-2016 to Jun-2022)

SOURCE: ISTAC (FRONTUR)

Annual real GDP percentage decline in 2020

SOURCE: INE (SPAIN REGIONAL ACCOUNTING) AND EUROSTATT

CANARY ISLANDS -18.1%

SPAIN -10.8%

EU-27 -5.9%

4. Key issue areas of tourism sustainability in the Canary Islands

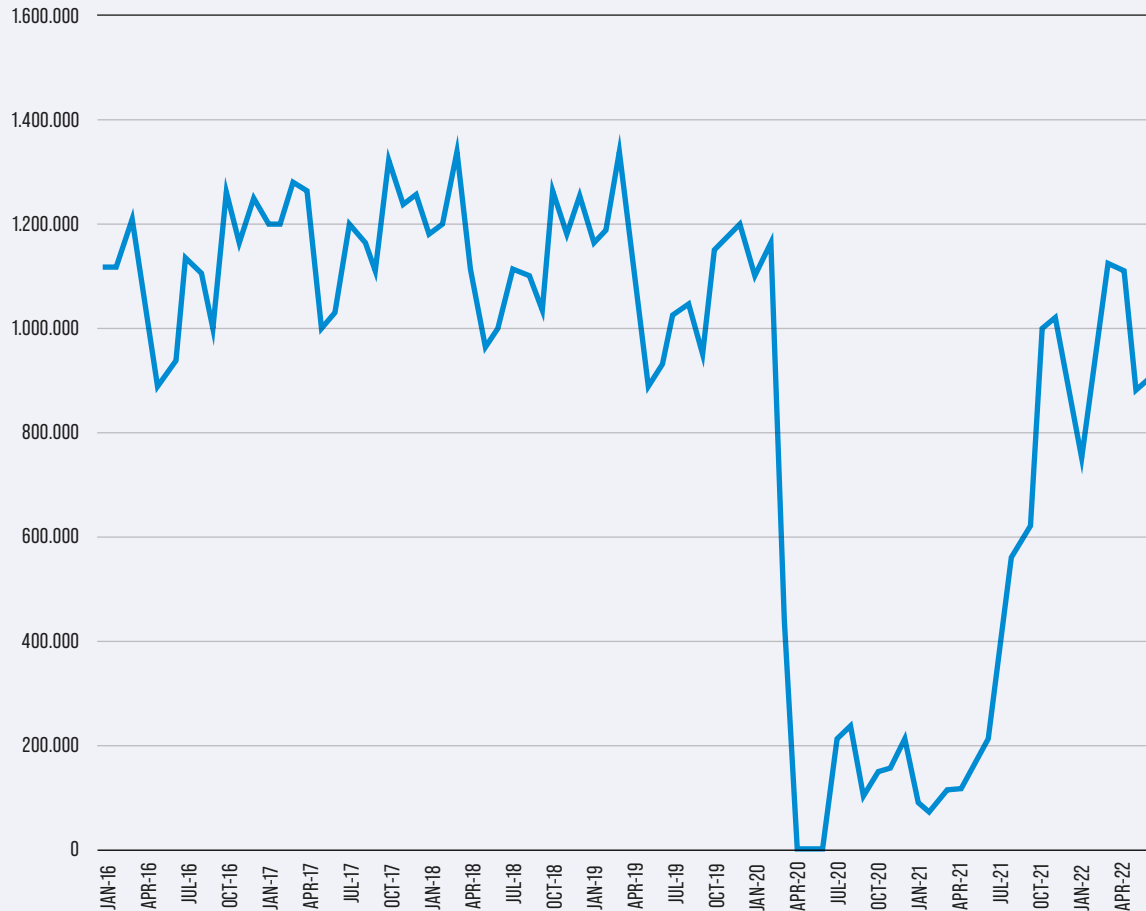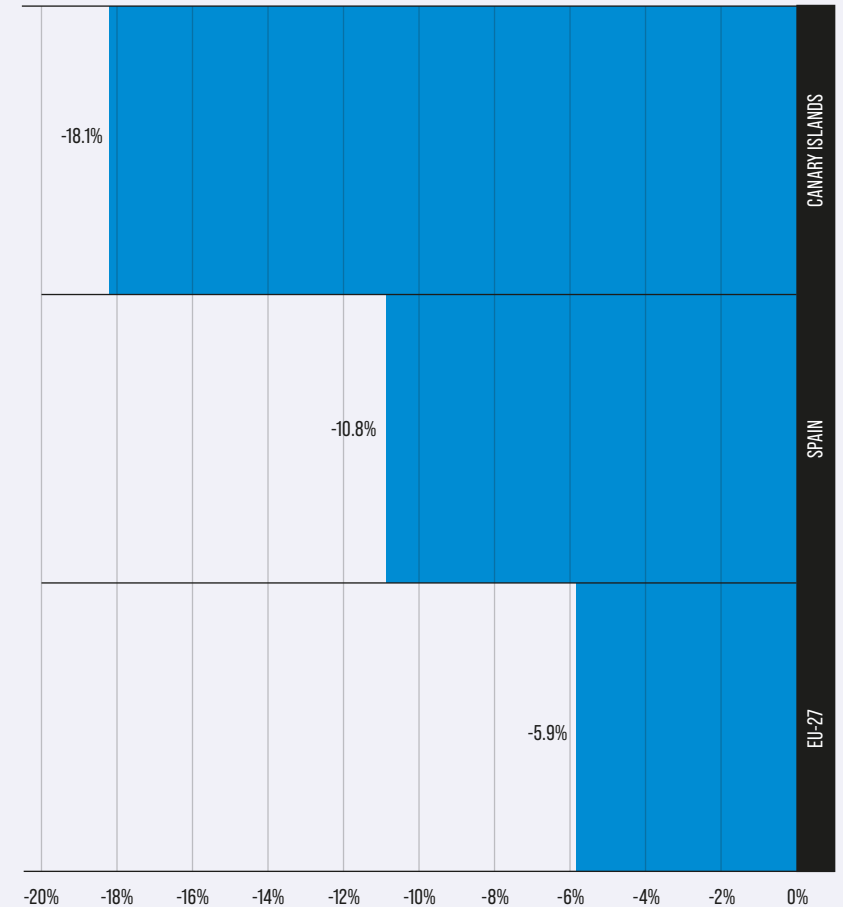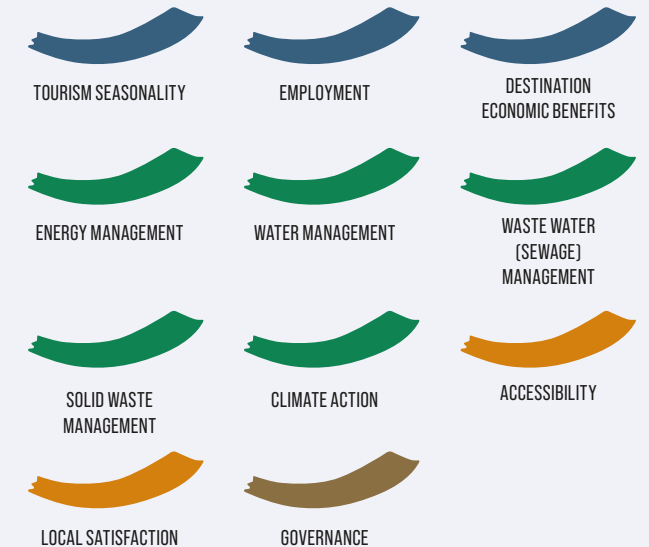|	
1. Local satisfaction with tourism and local well-being	INSTO Mandatory issue (extended)
2. Labor skills, entrepreneurship and employment	INSTO Mandatory issue (extended)
3. Destination economic benefits and innovation	INSTO Mandatory issue (extended)
4. Tourism seasonality	INSTO Mandatory issue
5.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

UNWTO-INSTO Mandatory issues

TOURISM SEASONALITY   EMPLOYMENT   DESTINATION ECONOMIC BENEFITS

ENERGY MANAGEMENT   WATER MANAGEMENT   WASTE WATER (SEWAGE) MANAGEMENT

SOLID WASTE MANAGEMENT   CLIMATE ACTION   ACCESSIBILITY

LOCAL SATISFACTION   GOVERNANCE

4.1. Local satisfaction with tourism and local well-being

Highlights

High level of satisfaction of the Canarian population with tourism. 80.1% of the interviewees agrees with the statement "tourism development has been positive to the island and its inhabitants" (ISTAC, 2019).

The islands with the highest tourist-resident ratio, Lanzarote and Fuerteventura, present the highest values in the evaluation of the benefits of tourism.
The island with the greatest tourism pressure, Fuerteventura, is also where, according to a 2019 ISTAC survey, there is most social support for the statement that tourism should continue to be promoted.

In the islands and zones with the highest tourist pressure (Fuerteventura, Lanzarote, Tenerife-South and Gran Canaria-South) the local population has a less positive opinion about holiday homes than in the islands with less tourism development (El Hierro, La Palma and La Gomera).

Support for tourism development: 83.2% of the local population agrees to continue promoting tourism (ISTAC, 2019)

Opinion of the local population on statements related to tourism (2019)

SOURCE: ISTAC

NOTE: THE SIZE OF THE SPHERE REPRESENTS THE RATIO BETWEEN EQUIVALENT TOURIST POPULATION AND RESIDENT POPULATION

■ LA PALMA   ■ LA GOMERA   ■ TENERIFE   ■ FUERTEVENTURA
■ EL HIERRO   ■ GRAN CANARIA   ■ LANZAROTE
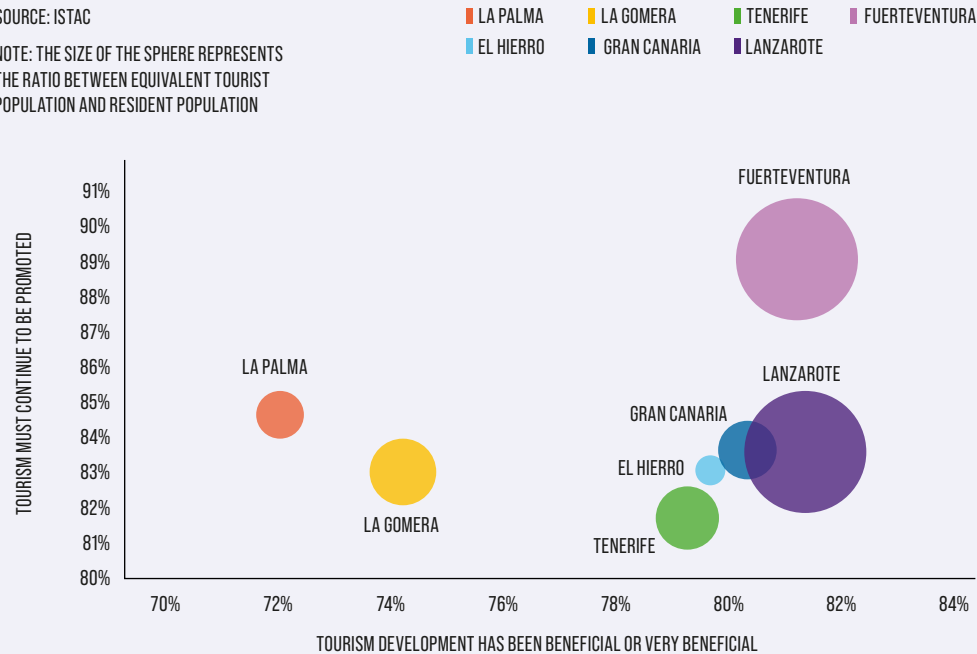
Local population support for holiday homes in the island (2019)

SOURCE: ISTAC

NOTE: AGREEMENT WITH THE STATEMENT: *HOLIDAY HOMES ARE VERY POSITIVE FOR THE ISLAND*. SCALE 1 TO 5. SOURCE: ISTAC (2019)

Island	Value
EL HIERRO	3.7
LA GOMERA	3.4
LA PALMA	3.3
TENERIFE-NORTH	3.2
GRAN CANARIA-METROPOLITAN AREA	3.1
GRAN CANARIA-NORTE	3.1
TENERIFE-ÁREA METROPÓLITANA	3.1
CANARY ISLANDS	3
GRAN CANARIA-SOUTH	2.9
LANZAROTE	2.8
TENERIFE-SOUTH	2.8
FUERTEVENTURA	2.7
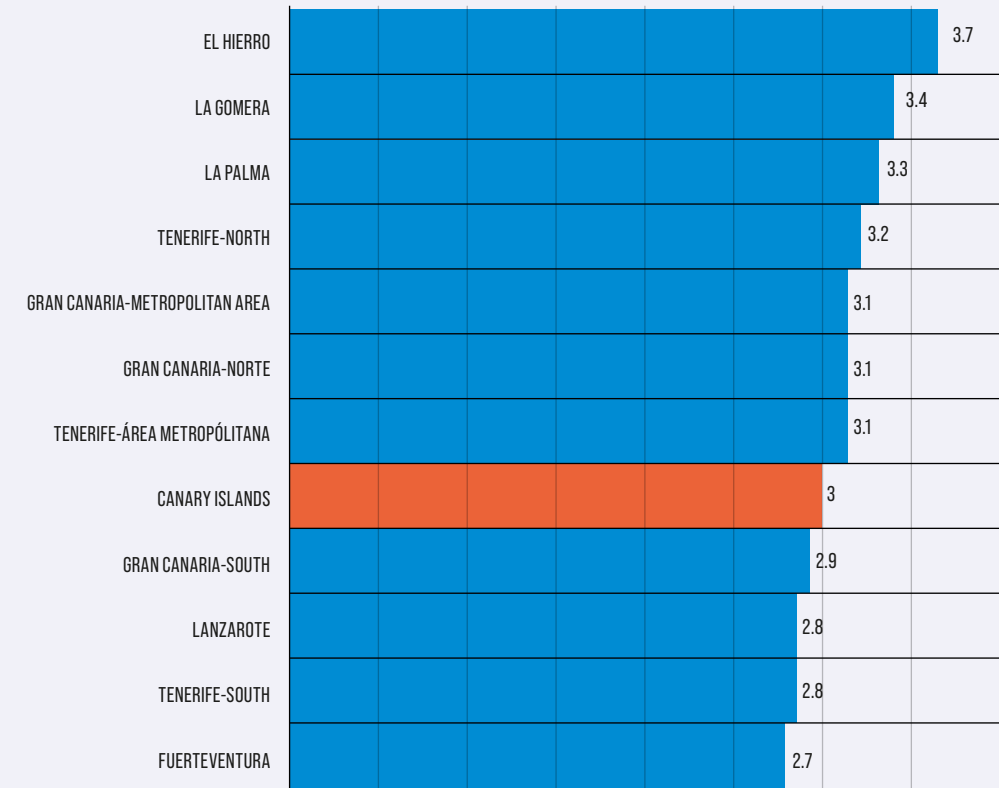
Further research

Include specific indicators on residents point of view over the tourism activity in the islands and their views on tourism management in Canary Islands.

Include results on perception and valuation of tourism and the environment using a Canary Island Public Opinion Barometer.

Challenges

Provide more detailed data on the positive and negative impacts of tourism and local satisfaction.

It is necessary to monitor if the level of awareness of citizens over the negative and positive impacts increase over time or not.

Promote the use of existing data on local wellbeing and local support in decision-making by stakeholders.

Checklist of main indicators of issue area 1: 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	Encuesta de Hábitos y Confianza Socioeconómica ECOSOC, 2019 (ISTAC)	Regular data needed
Perception of tourism impacts	Average evaluation of economic, social, cultural and environmental impacts of tourism	Occasional data	Encuesta de Hábitos y Confianza Socioeconómica ECOSOC, 2019 (ISTAC)	Regular data needed
Environmental awareness	Rate of local population who prefer to protect environment, even if it means lower economic growth	Not Available		

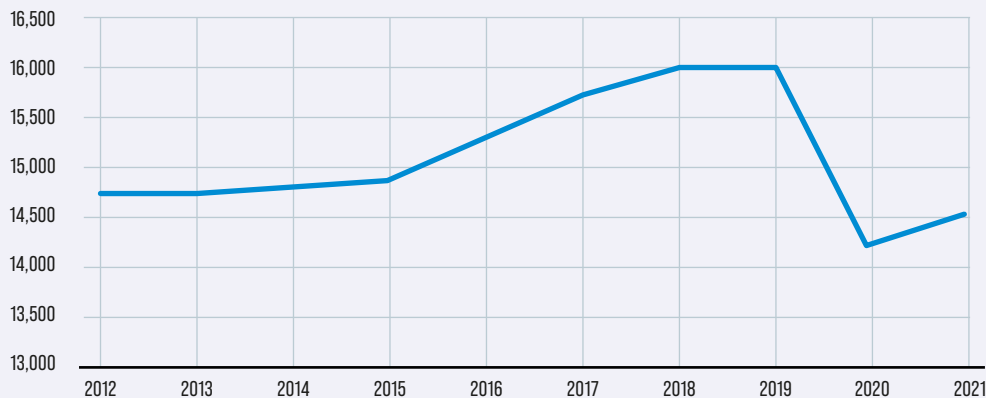# 4.2. Labor skills, entrepreneurship and employment

Highlights

High unemployment rate (around 20% in 2018 and 2019), among the highest in Spain and Europe (ISTAC).

Over the last decade aprox. 21% of employment in terms of Social Security affiliates was registered in activities characteristic of tourism (ISTAC).

Distribution of tourism employment over the last decade: Approximately 41% has been concentrated in accommodation activities; 37% in bars and restaurants and 22% is distributed among passenger transport, travel agencies and cultural, recreational activities and sports (ISTAC).

Low GDP per capita; one of the regions of Spain with the lowest GDP per capita: €17,448 (INE, 2020) is related to high level of unemployment; lack of education skills; lack of entrepreneurship; the difficulties to integrate the internal market and the difficulties to promote economic activities beyond tourism.

Reducing gender gap is an objective to be achieved. Only 33% of affiliates to Social Security in the highest qualification groups in the tourism industry are women while women are 46% of total affiliates (Jul-2022, ISTAC). Also women show higher figures for part-time contracts.

Companies registered in Social Security in tourism characteristic activities

SOURCE: ISTAC

Evolution of the number of Social Security affiliates in tourism characteristic activities

SOURCE: ISTAC   ■ ACCOMMODATION   ■ RESTAURANTS   ■ REST OF TOURISM CHARACTERISTIC ACTIVITIES
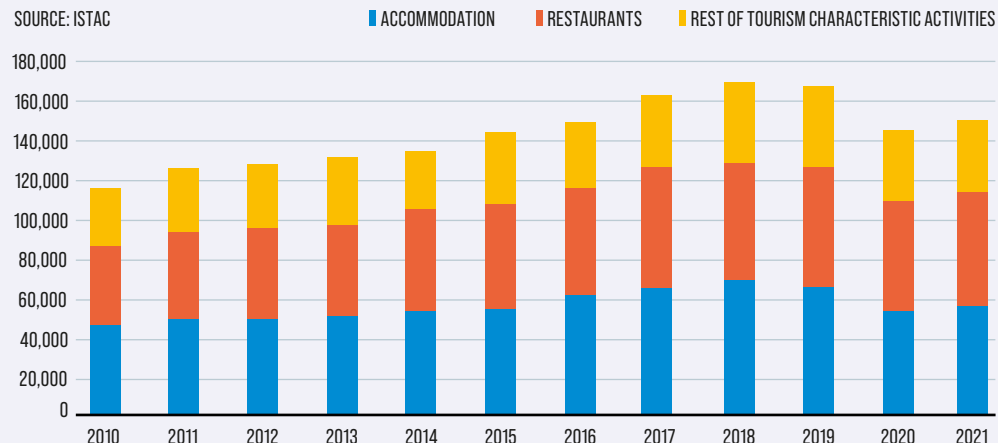
Part time workers in the tourism industry

SOURCE: ISTAC

■ PART TIME (MEN)   ■ PART TIME (WOMEN)

Latest indicators

Social Security affiliations (Jul. 2022): 23.7% of affiliations to Social Security in tourism characteristic activities (ISTAC).

Average annual earnings per worker (for the whole service sector) Canary Islands: €20,822; Spain: €23,845 (INE, 2019).

Companies registered in economic activities characteristic of tourism: 15,281 companies (Jul. 2022); 14,368 (Jul. 2021). Increase 6.3 % (Jul. 2022 - Jul.2021) (ISTAC).

Self-employment in the tourism industry

SOURCE: ISTAC

■ MEN   ■ WOMEN

Social Security affiliates in tourism characteristic activities (July, 2022)

SOURCE: ISTAC

■ MEN   ■ WOMEN

54% MEN

46% WOMEN
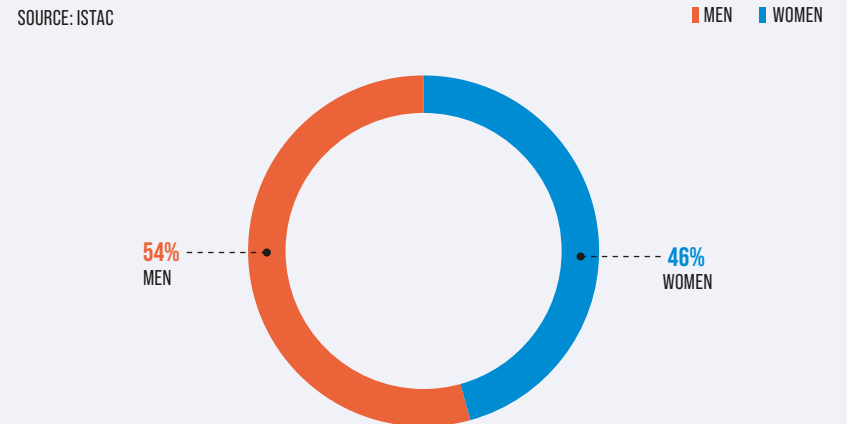
Challenges

Increase the orientation in entrepreneurship within the education system.

Improvement of educational system in language learning.

Further research

Detailed information on wages and working conditions in the sector.

Official information on employment in the sector from a demand perspective.

It is imperative that information and data be integrated in scorecards to allow the alignment of training actions and education trends in hospitality and tourism education with the achievement and maintenance of quality jobs.

Data about over and under qualifications in tourism.

Index of creation and survival rates of startups in tourism.

Gender gap in tourism employment.

Share of affiliates to Social Security in the highest qualification group (July, 2022)

SOURCE: ISTAC

- AFFILIATES TO SOCIAL SECURITY IN THE HIGHEST QUALIFICATION GROUP
- REST OF AFFILIATES TO SOCIAL SECURITY
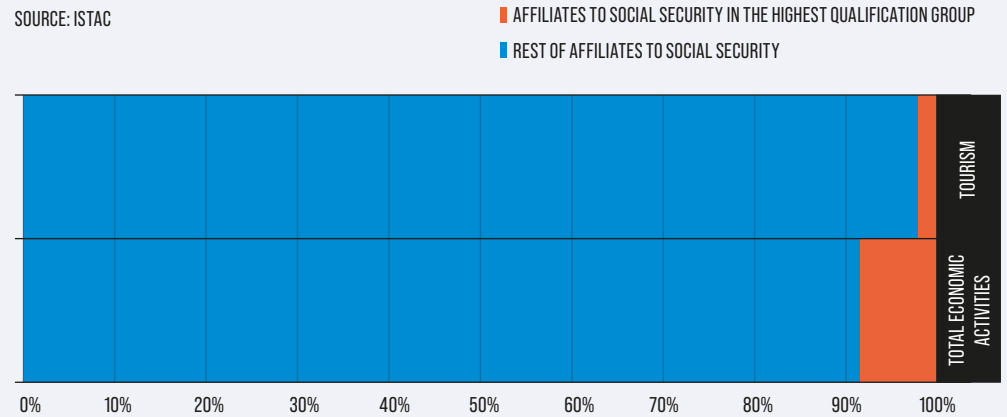
Share by gender of affiliates to Social Security in the highest qualification group in the tourism industry (July, 2022).

SOURCE: ISTAC

- MEN
- WOMEN

33%
WOMEN

67%
MEN

Checklist of main indicators of issue area 2: Labor skills, entrepreneurship and employment

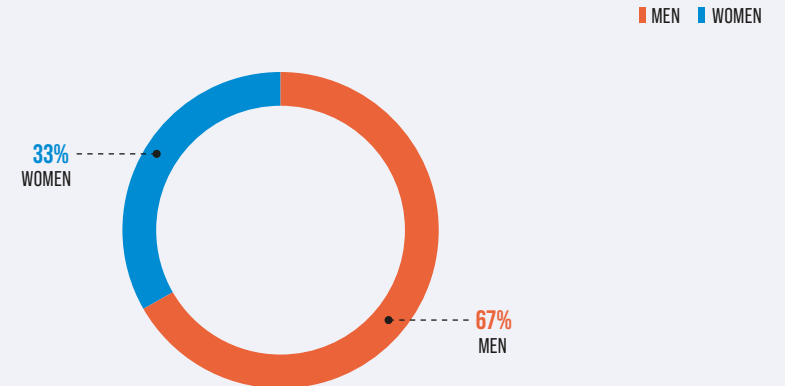| Indicator	Description	Availability	Source	Remarks
Tourism employment	Employment in tourism, distribution by gender, age, inclusion of people with disabilities. Employment should be measured from a supply approach and through a demand side approach.	Partially available	Affiliation to Social Security in the tourism characteristic activities (ISTAC). Employment in accommodation establishments, hotels and apart-ments (ISTAC)	Distribution by age and inclusion of people with disabilities needed. Data from supply approach are needed
Over and under qualification in tourism	Analyzes the over and under qualification of tourism professionals and jobs allowing initiative to improve policies and take impro-vement actions.	Occasional data	Informe iTalento (Fundación Impulsa)	Estimation based on occasional research and national reports
Index of creation and survival rate of startups in tourism	Identifies the creation of new companies in the Canary Islands that provide their services in tourism and their age as an indicator of survival.	Partially available	Firms registered in the Social Security in the tourism characte-ristic activities (ISTAC)	Data are needed on survival rate of startups in tourism

4.3. Destination economic benefits and innovation

Highlights

Tourism contributes to 33% of GDP in 2019 (Spain:12.4%) (IMPACTUR, 2020).

Low impact of tourism on enhancing the economic conditions of the local population. Despite the intense tourism development, the rate of unemployment is among the highest of the European Union and the GDP per capita is among the lowest of Spanish regions.

The development of tourism in the Canary Islands has not taken enough advantage of a second tier of activities (design, consulting, agriculture, renewable energies, etc.) that could improve living standards in the region.

Low weight of R&D carried out by companies and the high dependence on universities and Public Administration (in Spain, the contribution to R&D spending by companies is 56%, in the Canary Islands, 20% (INE, 2020).

Autonomous region that made a lower expenditure per inhabitant in R&D (INE, 2020).One of the Autonomous Regions in Spain with the least capacity to attract and retain talent (COTEC, 2020).

Despite the leadership of the Canary Islands tourism sector in the European tourism market, the indicators on income, poverty and employment have traditionally placed the islands among the poorest regions in Spain and Europe. Canary Islands is one of the Spanish Autonomous Regions with the highest AROPE rate (At Risk of Poverty and/or Exclusion): 36.3% (INE, 2020).

Evolution of tourism GDP (million €)

SOURCE: IMPACTUR (EXCELTUR AND GOVERNMENT OF CANARY ISLANDS). NOTE: CURRENT PRICES
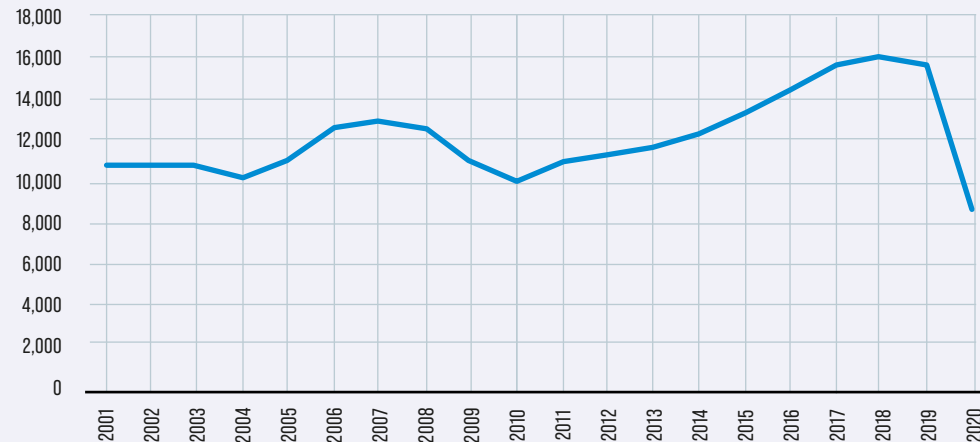
GDP per capita (2020)

SOURCE: INE
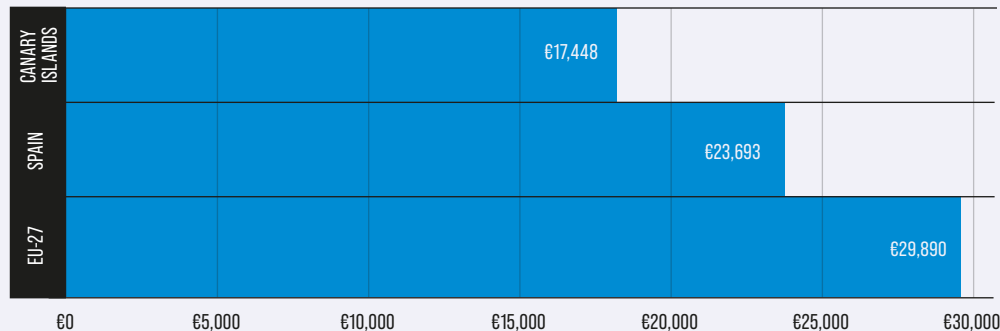
Latest indicators

The Canary Islands is one of the communities with the lowest spending per inhabitant on R&D activities: €98. Spain: €328,6 (INE,2020).

Innovative companies in the Canary Islands period 2017-2019: 15,5% (20,8% Spain) (INE, 2019).

Challenger

Development and support to tourism intelligence, knowledge and evidence-based decision making.

Open knowledge exchanges among public and private sectors, companies and universities. Strengthen the R&D system linked to tourism.

Further research

Research on employment conditions.

Research on innovation in tourism characteristic business.

Channels of conversion of tourism expenditure into income for residents and taxes. Distribution issues.

Tourism value chain. Impacts and external leakages

Aggregated annual tourism expenditure (Million €)

SOURCE: ISTAC. NOTE: INCLUDING INTERNATIONAL VISITORS AND MAINLAND SPAIN

Daily tourist expenditure

SOURCE: ISTAC
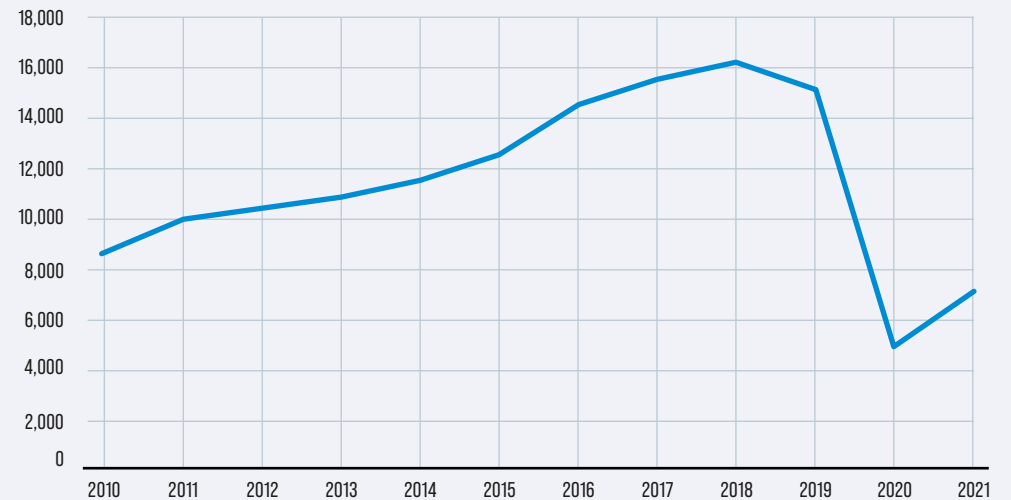
Distribution of R&D spending, 2020

SOURCE: INE

HIGHER EDUCATION **PUBLIC ADMINISTRATION** **COMPANIES**
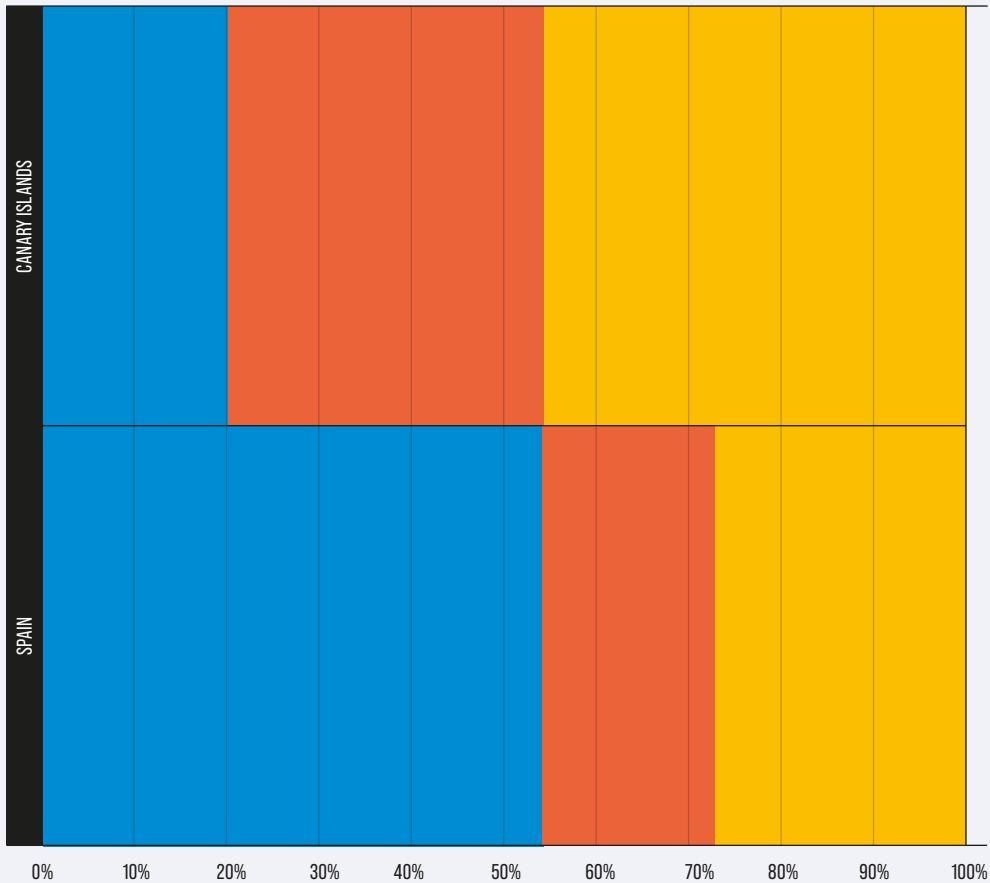
Expenditure on internal R&D per inhabitant by Autonomous Regions of Spain (2020 in euros)

SOURCE: INE
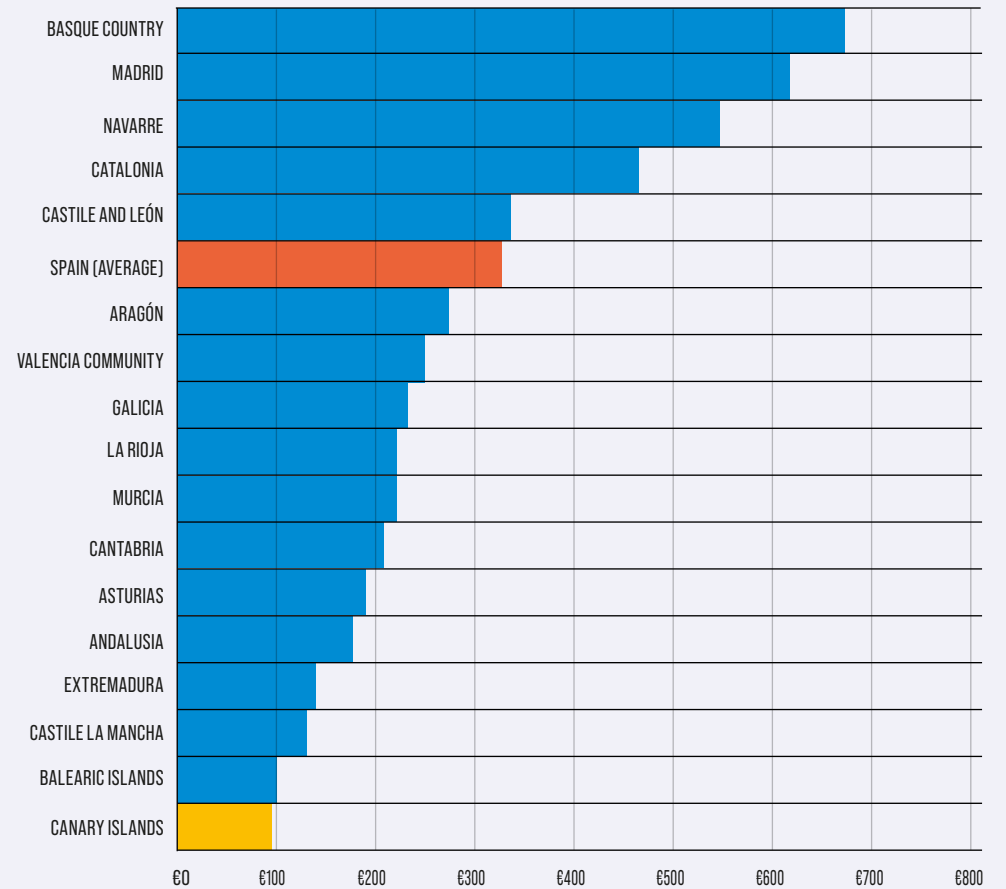
Checklist of main indicators of issue area 3: Destination economic benefits and innovation

Indicator	Description	Availability	Source	Remarks
Employment conditions	These indicators monitor salaries, labor conditions and the contribution of tourism employment to the well-being of the local population	Partially available	Annual Wage Structure Survey (INE) Employed persons by economic sectors (INE and ISTAC)	Data on working conditions are needed
Distribution of local value added related to tourist expenditure	This indicator assesses the success of the region in translating tourism expenditure into local value-added for the different economic activities (primary, secondary and tertiary) and economic agents (salaries, gross operating surplus and taxes)	Partially available	Contribution of Tourism to GDP: Impactur Canarias 2020 (Exceltur y Government of the Canary Islands) Tourism Expenditure survey (ISTAC)	Data on distribution of local value added for the different economic activities and economic agents are needed
Research, development and innovation investments and results in tourism-related firms	Indicators on the number of initiatives, the value and the current or expected results	Partially available	Statistics for R&D (INE)	Specific data on tourism are needed

4.4. Tourism seasonality

Highlights

Absence of pronounced seasonal pattern. Peak season corresponds to the winter.

The Canary Islands enjoy a mild winter with 18ºC - 25ºC. This contrasts favorably with the climatic conditions in the European continent and competing sun and beach destinations in the Mediterranean.

Monthly differences are not very significant in the number of tourists.

Available quarterly figures for tourism employment in tourism characteristic activities do not show a significant seasonality pattern.

Hotels & apartments seasonality indicators for 2019

SOURCE: ISTAC

2019	Average Daily Rate (ADR)	Overnight stays	Aggregate turnover
Maximum	Dec-19 €93,04	Aug-19 9.6 mill.	Dic-19 373 mill.€
Minimum	Jun-19 €73,10	May-19 6.9 mill.	May-19 248 mill.€

Seasonality by main countries of origin (2019)

SOURCE: FRONTUR (ISTAC)   ■ SPAIN   ■ GERMANY   ■ UNITED KINGDOM   ■ FRANCE   ■ NETHERLANDS   ■ NORDIC COUNTRIES
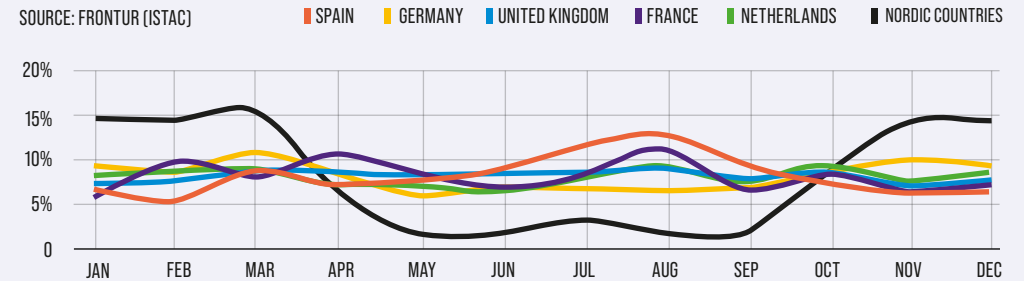
Monthly distribution of international tourist arrivals (2019) (%)

SOURCE: FRONTUR (ISTAC)   ■ LA PALMA   ■ FUERTEVENTURA   ■ GRAN CANARIA   ■ TENERIFE   ■ LANZAROTE
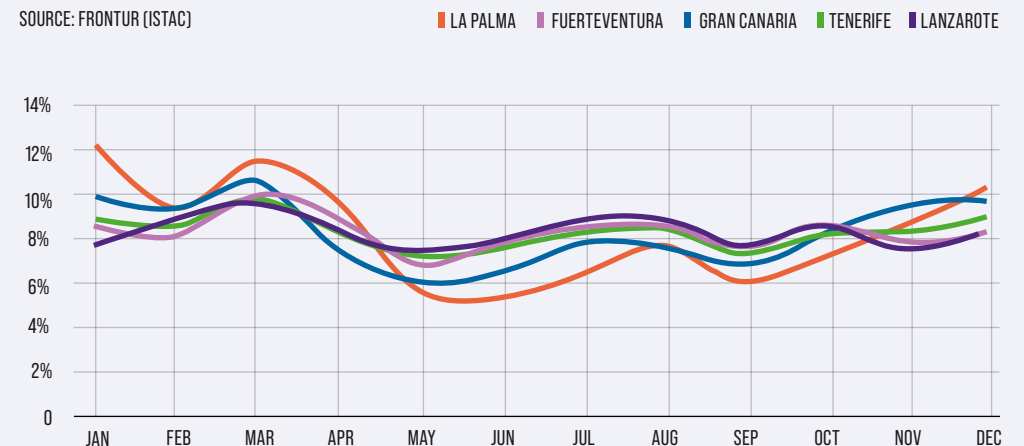
Further research

Statistics on expenditure are only available on a quarterly basis. A monthly frequency is necessary. Monthly tourism data are widely available, but there is a need for weekly and daily data at least for some indicators.

Statistics that could help monitor seasonality related to energy, water consumption and waste production.

Monthly evolution of overnight stays in hotels and apartments in the Canary Islands (2017-2019)

SOURCE: ISTAC

2017   2018   2019

Monthly accommodation indicators (2019)

SOURCE: ACCOMMODATION SURVEY (ISTAC)

ADR   RevPAR   OCCUPANCY RATE
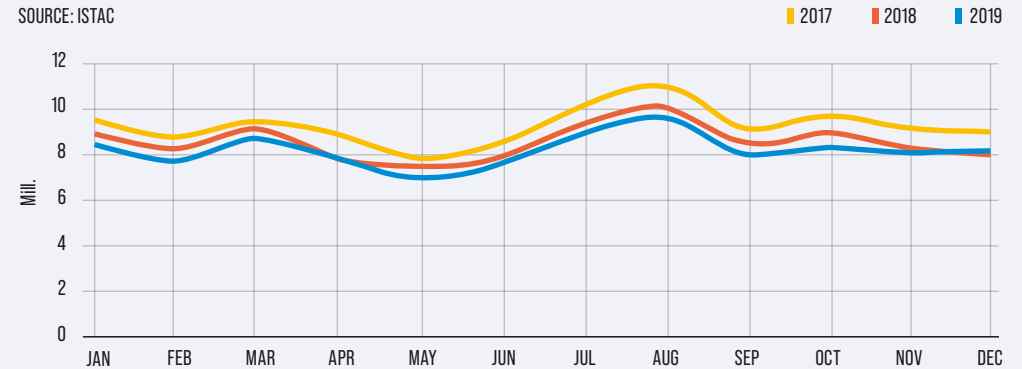
Rainfall and average temperature in the Canary Islands

SOURCE: ES.CLIMATE-DATA.ORG

RAINFALL   AVERAGE TEMPERATURE
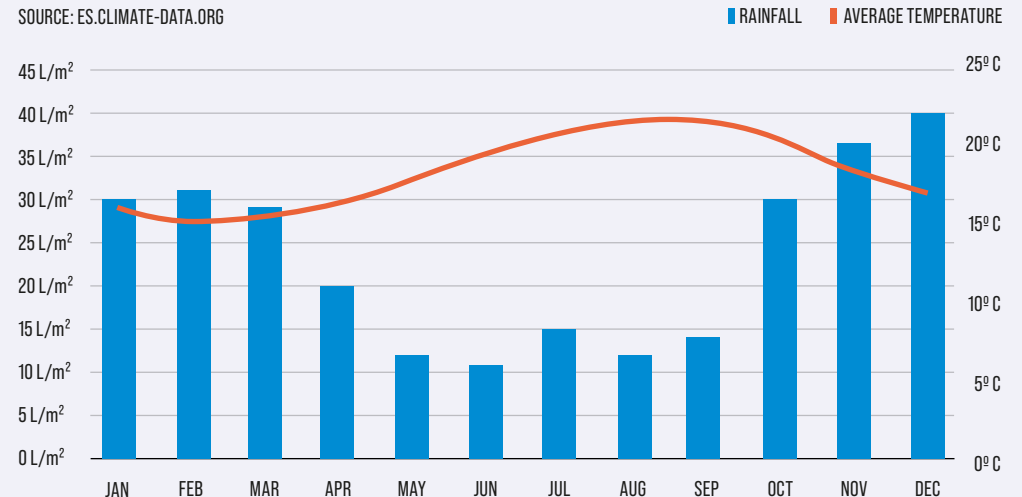
Checklist of main indicators of issue area 4: Tourism Seasonality

Indicator	Description	Availability	Source
Tourism demand in high season and low season	This analysis must be conducted for tourist arrivals, overnight stays, expenditure, average daily rates (ADR), Revenue per available room (RevPAR) and occupancy rates	Available	Accommodation Survey (ISTAC) Tourism Expenditure Survey (ISTAC) Frontur Canarias (ISTAC)
Seasonality of inbound countries of residence	Analysis of detailed seasonal patterns for demand segments, particularly 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 tourism destinations	Available	Accommodation Survey (ISTAC)Tourism Expenditure Survey (ISTAC) Frontur Canarias (ISTAC)

4.5. Destination attractiveness and tourist satisfaction

Highlights

Unique climatic conditions of the Canary Islands for the practice of outdoor activities throughout the year.

66% of tourists visit beaches during their stay (ISTAC, 2019).

The leisure sector, with a few exceptions, is made up of very small companies.

Tourists spend an average of 7.4 hours outside establishment (ISTAC, 2019). 7% of tourists spend on cultural activities (Promotur, 2019). 59.1% spend on restaurants and cafes in the Canary Islands (Promotur, 2019).

On a scale of 0-10, the intention to recommend Canarias is 8.95 (ISTAC, 2019)

Main points of interest (Promotur, 2019):
▸ In Tenerife: 37.2% of tourists visit the Teide National Park.
▸ In Gran Canaria: 49.3% visit Maspalomas Dunes.
▸ In Lanzarote: 35.4% visit Montaña de Fuego/Route of the Volcanoes.
▸ In Fuerteventura: 37.3% visit Playas de Jandía.
▸ In La Palma: 72.6% visit Santa Cruz de la Palma.

2.5 million cruise passengers disembarked in the ports in 2019

Tourist satisfaction in the Canary Islands (2019)

SOURCE: ISTAC

Category	Value
WORSE OR MUCH WORSE THAN EXPECTED	2%
UP TO EXPECTATIONS	56%
BETTER OR MUCH BETTER TAN EXPECTED	42%
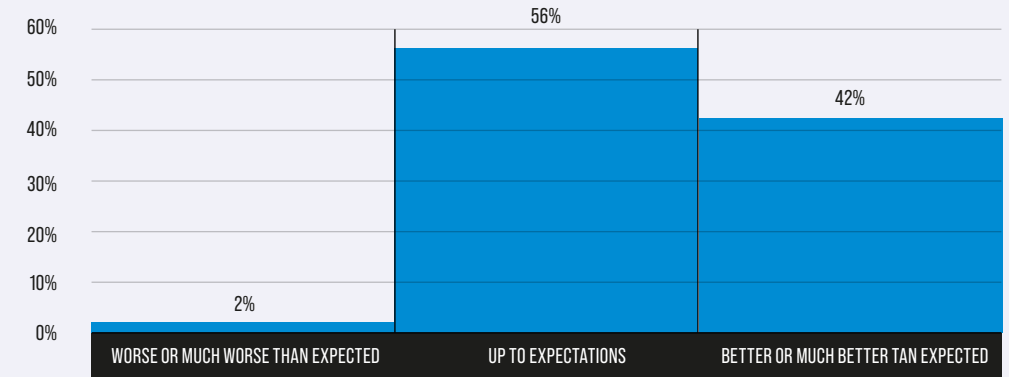
Services purchased by tourists (2019)

SOURCE: PROMOTUR (FROM ISTAC DATA)

Service	Value
CAR RENTAL	26.3%
ORGANIZED TOURS	20.6%
TAXI, TRANSFER	50.0%
LEISURE PARKS	7.5%
SPORT ACTIVITIES	5.7%
MUSEUMS	4.6%
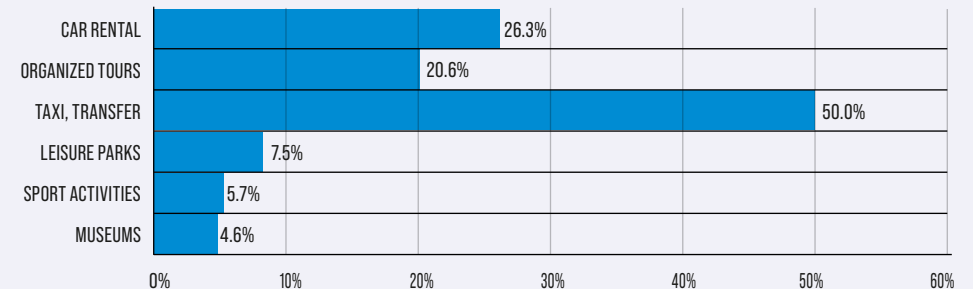
Evolution of cruise passengers

SOURCE: ISTAC

Evolution of cruise passengers in the Canary Islands

SOURCE: ISTAC

LA PALMA   FUERTEVENTURA   GRAN CANARIA   TENERIFE   LANZAROTE
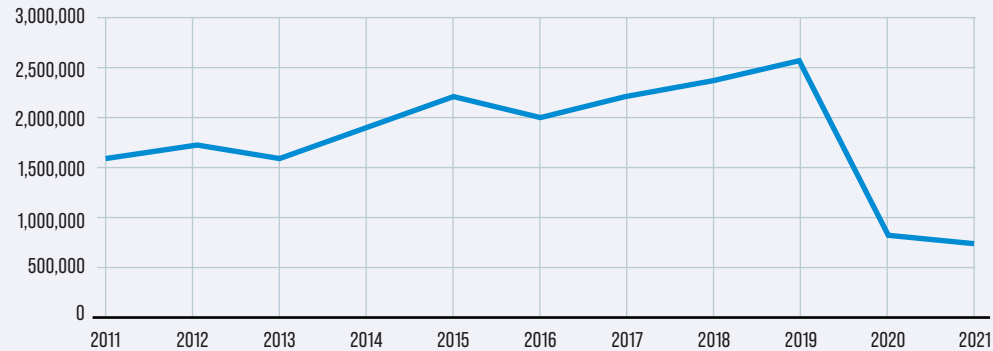
Latest indicators

General tourist satisfaction:

Average rating of their experience in the Canary Islands (on a scale of 0-10):
   2019: 8.70/10 (ISTAC, 2019).
   2021: 8.86/10 (ISTAC, 2021).

Average evaluation of returning to the Canary Islands (on a scale of 0-10)):
   2019: 8.73 / 10 (ISTAC, 2019).
   2021: 8.86 / 10 (ISTAC, 2021).

7.5% of tourists visit leisure parks; 5.7% of tourists book sports activities; 4.6% of tourists visit museums; 20.6% of tourists book organized excursions (Promotur, 2019).

Further research

Better knowledge of supply and demand trends about nature, culture, sport, and leisure activities and events.

Challenge

Uso de big data basado en la huella digital turística para mejorar el atractivo de los destinos.

Checklist of main indicators of issue area 5: Destination attractiveness and tourist satisfaction

Indicator	Description	Availability	Source
Overall tourist satisfaction	The global satisfaction of tourists for the whole experience	Available	Tourism Expenditure Survey (ISTAC)
Satisfaction of tourists with nature, culture, sport and leisure activities	This indicator comprises the satisfaction of tourists with some of the main components of the tourist experience	Occasional	Tourism Expenditure Survey (ISTAC)
Supply and demand of nature, culture, sport and leisure activities and events	The identification of the activities of tourist within the destination that result in unique tourist experiences	Partially available	Tourism Expenditure Survey (ISTAC)

4.6. Digitalization, knowledge and smart tourism

Highlights

There is no specific institution in the Canary Islands that controls, manages or promotes the digitisation of the sector in a coordinated manner.

The Canary Islands have five Smart Destinations recognised by the Spanish network of Smart Tourist Destinations: 2 islands and 3 municipalities.

The initiative *Canarias Destino* was created to digitize both, the tourist's shopping experience and the entrepreneur's sales experience.

Latest indicators

Infrastructure and connectivity: 99.3% of companies have internet connection (INE) (2021Q1).

Relevance of the internet: 67.9% of companies with 10 or more employees have website; 78.3% of companies in Spain (INE) (2021Q1).

ICT specialist staff in companies with 10 or more employees:13.4% of companies in the Canary Islands; 16.4% of companies in Spain (INE) (2021Q1).

Challenges

Fostering digitalisation among tourism firms to promote efficiency and increase the demand of qualified human resources.

Take advantage of opportunities of digitalization to improve competitiveness, personalisation of tourist experience and differentiation of the destination.

ICT resources and use in companies with 10 or more employees

SOURCE: INE   ■ CANARY ISLANDS 2019   ■ CANARY ISLANDS 2020   ▬ SPAIN AVERAGE 2020
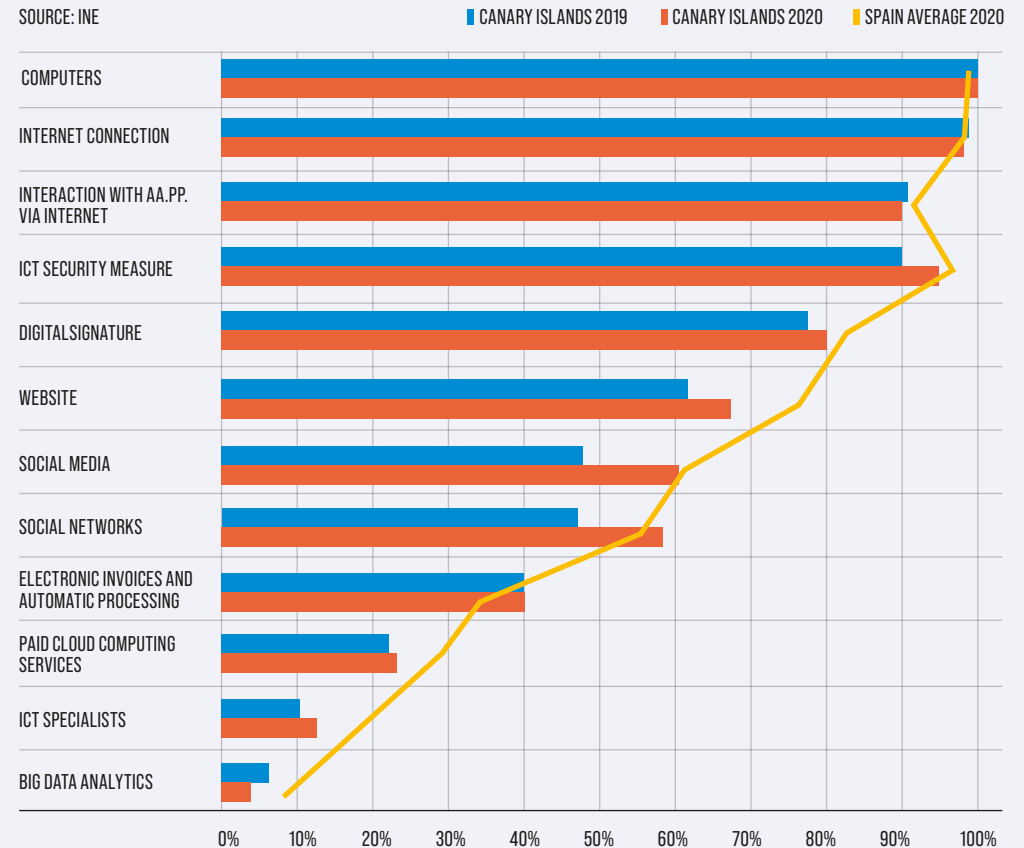
Further research

Promote research on digitalisation and sustainability, using big data analysis techniques, artificial intelligence and neuromarketing.

Investigate the contribution of digitalisation to improve the tourist experience.

Encourage the use of new sources of information on tourism sustainability based on the digital footprint: resource consumption, marketing, tourist mobility.

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

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

4.7. Energy management

Highlights

The Canary Islands has historically had a high dependence on overseas suppliers of fossil fuels-mainly oil- for its energy needs, with a relatively low presence of renewable energies coming from domestic sources.

The total share of renewable energies remained practically stable over the period 2008-2017. Nevertheless, figures have raised from 7.86% in 2017 to 16.96% in 2020 (Anuario Energético de Canarias, 2020).

The high cost of electricity generation, due to the high dependence on fossil fuels, is a key problem.

The fleet of vehicles on the islands has increased around 15% (2015-2021) (ISTAC/DGT, 2021). Vehicles per capita are 20% higher than the national average.
Energy demand increases steadily.

Latest indicators

Share of final energy demand by economic sectors: the services sector, which includes hospitality and tourism services, uses 14.4% in 2020.

The transport sector (land, air and sea), represents 67,8% of the final energy demand.

Evolution of the annual gross production of electricity in the Canary Islands, broken down by origin

SOURCE: ENERGY YEARBOOK OF THE CANARY ISLANDS   % POWER PLANTS   % REFINERY AND COGENERATION   % RENEWABLE ENERGY
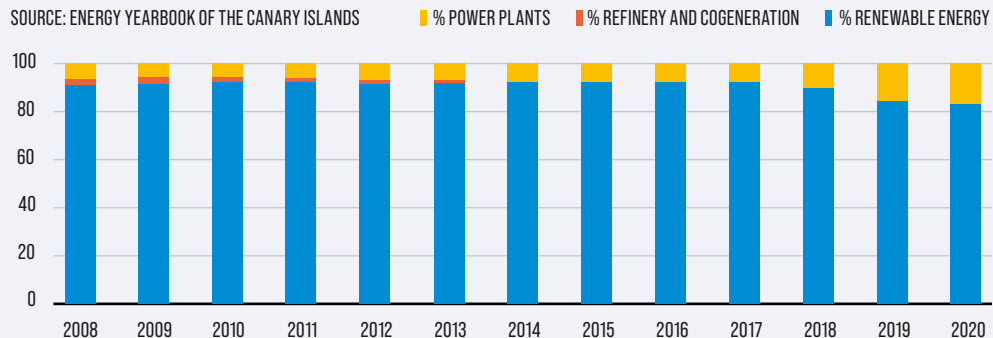
Challenges

To increase the use of renewable energies with the consequent reduction of emissions.

Encourage greater energy savings in the energy sector.

Opportunities

Promoting energy efficiency in the tourism industry.

The Canary Islands have the resources to increase renewable energy production and reduce CO_2 emissions.

Further research

Monitoring energy consumption, sources and management by tourism firms.

Estimations of the energy footprint of tourists and different segments of the market.

Share of final energy demand by economic sectors, 2020.

SOURCE: ENERGY YEARBOOK OF THE CANARY ISLANDS (SPANISH: ANUARIO ENERGÉTICO DE CANARIAS)

2%
AGRICULTURE,
LIVESTOCK AND FISHERIES

3%
INDUSTRY

1%
NOT SPECIFIED

11%
MARITIME TRANSPORT

14%
ADMINISTRATION,
COMMERCE AND
SERVICES (PRIVATE
AND PUBLICS)

39%
LAND TRANSPORT

12%
RESIDENTIAL

18%
AIR TRANSPORT
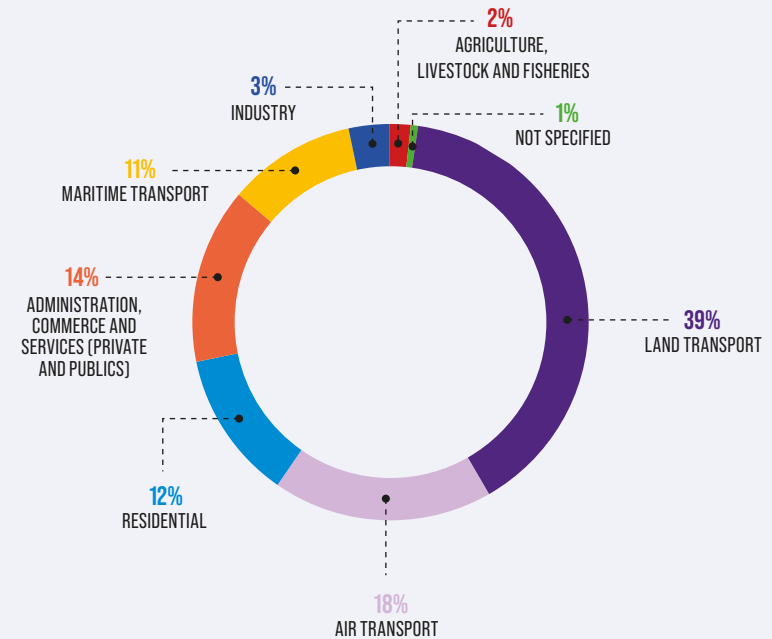
Electricity production from renewable sources in the Canary Islands, 2020

SOURCE: ENERGY YEARBOOK OF THE CANARY ISLANDS, 2020 (SPANISH: ANUARIO ENERGÉTICO DE CANARIAS, 2020)

La Palma:
- Wind: 18,663 [-18.16% ↓]
- Photovoltaic: 7,718 [+3.28% ↑]
- Total: 26,381 [-12.87% ↓]
- R/T 9.9%
- Photovoltaic 29.26% / Wind 70.74%

El Hierro:
- Photovoltaic 0.50%
- Hydro-wind 99.50%

La Gomera:
- Photovoltaic: 172 [+92.58% ↑]
- Wind: 33,966 [-18.44% ↓]
- Total: 34,138 [-18.20% ↓]
- R/T 54.4%

Tenerife:
- Wind: 483,745 [-2.32% ↓]
- Photovoltaic: 176,720 [-3.69% ↓]
- Biogas: 8,804 [+3.89% ↑]
- Minihydraulic: 3,486 [-1.08% ↓]
- Total: 672,754 [-3.69% ↓]
- R/T 20.3%
- Minihydraulic 0.52% / Biogas 1.31% / Photovoltaic 26.27% / Wind 71.91%
- R/T 0.3%
- Photovoltaic 59.90% / Wind 40.10%
- Wind: 90 [-35.03% ↓]
- Photovoltaic: 134 [+10.85% ↑]
- Total: 224 [-13.61% ↓]

Gran Canaria:
- Wind: 500,202 [+0.35% ↑]
- Photovoltaic: 62,773 [+5.79% ↑]
- Biogas: 4.648 [-]
- Total: 567.623 [+1.77% ↑]
- R/T 16.9%
- Photovoltaic 11.06% / Biogas 0.82% / Wind 88.12%

Lanzarote:
- Wind: 58,900 [-12.98% ↓]
- Photovoltaic: 13,571 [+7.81% ↑]
- Biogas: 727 [-56.38 ↓]
- Total: 73,199 [-10.67% ↓]
- R/T 9,8%
- Biogas 0.99% / Photovoltaic 18.54% / Wind 80.47%

Fuerteventura:
- Wind: 50,260 [-20.81% ↓]
- Photovoltaic: 18.115 [-4.76% ↓]
- Total: 68,374 [-17.11% ↓]
- R/T 12.2%
- Photovoltaic 26.49% / Wind 73.51%

MAP KEY:
- WIND POWER
- HYDRO-WIND
- PHOTOVOLTAIC
- BIOGAS (LANDFILL)
- MINIHYDRAULIC

SHARE OF ELECTRICITY DEMAND THROUGH RENEWABLES
- 0%<5%
- 10%<15%
- 5%<10%
- >15%

UNITS: MEGAWATT-HOURS(MWh)

Checklist of main indicators of issue area 7: Checklist of main indicators of Energy management

Indicator	Description	Availability	Source	Remarks
Renewable energy share in primary energy utilization	Tons of petroleum equivalent of renewable energy sector / Total tons of petroleum equivalent of total primary energy	Available	Energy Yearbook. Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias	
Share of energy consumption by economic sectors	Tons of petroleum equivalent demand of economic sector / Total tons of petroleum equivalent of energy demand	Partially available	Energy Yearbook. Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias	Tourism related data is need
Energy intensity by economic sector	Total tons of petroleum equivalent demand of economic sector / value added of economic sector	Partially available	Energy Yearbook.Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias	Tourism related data is need

4.8. Water and wastewater management

Highlights

Desalination: around 90% of water in the eastern Canary Islands (INE).

Low efficiency: urban distribution networks had an apparent efficiency of 65% (2018), with real water losses of 35% (INE, 2018).

In 2018, the average cost per m³ of water supplied was €2.10/m³, broken down into €1.72/m³ for supply and €0.38/m³ for sewerage and wastewater treatment (INE, 2018).

70% of household + industrial used water goes to the sea, after treatment.

Main studies analysing water consumption in the accommodation:

1.- Average consumption of 289 litres per overnight stay in Tenerife in 2016 (more than double the average household consumption in Spain in 2016) (Ruiz-Rosa et al., 2020)

2.- Arona case (3rd tourist municipality in the Canary Islands): the average consumption per overnight stay of hotel establishments and apartment complexes could be 120.2% and 88.7% higher, respectively, than the daily consumption per resident (according to the urban supply company of the municipality) (Estévez-Bauluz, 2021).

The average consumption in tourism reaches 600 liters per bed and day (Government of Canary Islands, 2014), meanwhile, the average consumption per inhabitant is 150 liters per day (ISTAC, 2016).

Evolution of the water consumption in the accommodation sector in the Canary Islands: 2011-2018 (m3)

SOURCE: OWN ELABORATION BASED ON THE DATA OF TOTAL WATER CONSUMPTION IN ARONA, TENERIFE (ESTÉVEZ BAULUZ, A., 2021)

APARTMENTS   HOTELS   TOTAL
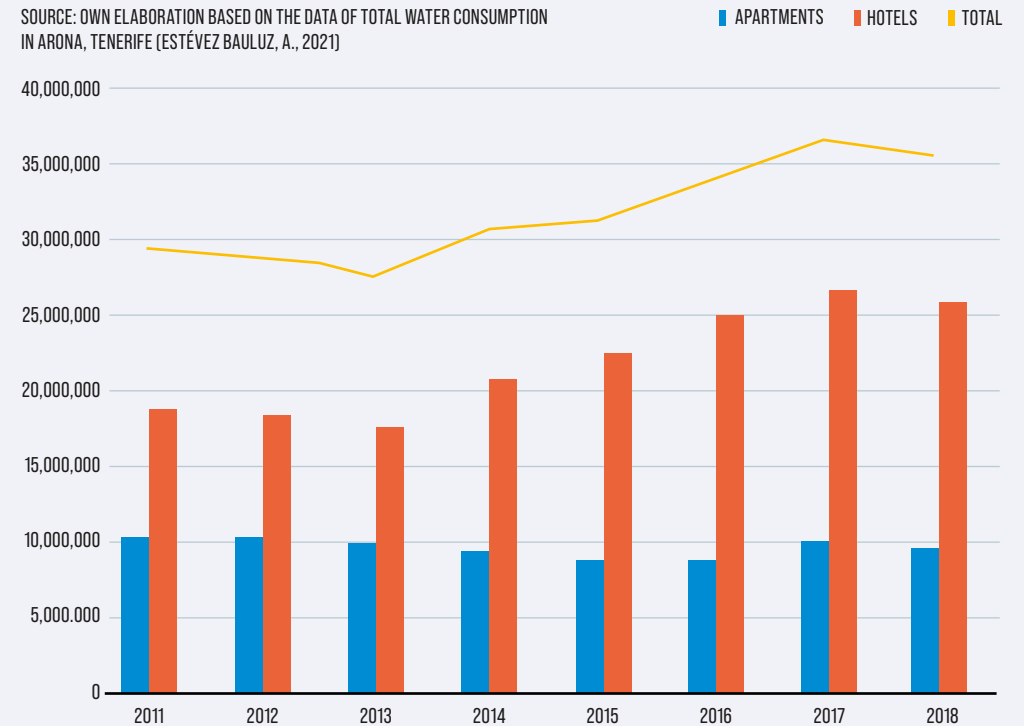
Latest indicators

Hotels: estimation of 329.49 litres per overnight. Apartments: 282.4 litres per overnight in 2018 (Estévez-Bauluz, 2021).

Other estimation for 2016 shows a figure of 289 litres per overnight which doubles the average residential consumption per inhabitant in Spain (Ruiz-Rosa et al., 2020).

Estimated consumption of 31,769,941 m³ by hotels and tourist apartments in the Canary Islands (Ruiz-Rosa et al., 2020). This figures is an estimation for 2016 based on an academic research.

In particular, 72.52% of the consumption in the accommodation sector is made by hotels and 27.48% by apartments in 2018 (Estévez-Bauluz, 2021).

Challenges

Better information could help municipal authorities modify their tariff systems to clearly identify tourist uses.

It is necessary to start monitoring residential and tourist water consumption separately.

Efforts to collect and publish information of water consumption in tourism.
Water awareness among enterprises.

In relation to sanitation and wastewater treatment, the situation is extremely complex and worrying in the archipelago: scarcity of information available in this area; the high percentage of the population and urban centres that are not yet connected to the sewerage network; the percentage of wastewater that is discharged directly into the sea, without prior treatment.

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

Indicator	Description	Availability	Source	Remarks
Total volume consumed and liters per tourist per day	Total water consumed in the tourism sector (cubic meters) and per guest-night (liters). It could also be compared to the consumption per inhabitant per day in the area	Occasional data	Academic research estimation based on previous research	Indicators from official statistical sources are needed, Methodologies to understand and compare water consumption in tourism are needed. From the demand side and the supply side.
Water awareness among enterprises	Percentage of tourism enterprises taking action to reduce water consumption	Not available		
Recycled water efforts	Percentage of water use derived from recycled water in the destination	Partially available	Statistics on Water Supply and Sanitation (INE)	Lack of information for the tourism sector

4.9. Solid waste management

Highlights

The waste from tourism remains hidden behind residential waste flows. Municipality statistics include both tourism related and non-related waste collection.

The overall waste generation in the Canary Islands is well above 1.2 million tons reached in 2015 and the majority ends up in the island´s landfills.

The generation of household waste in the Canary Islands in 2019 was 577.7 kg per inhabitant, above the national average for Spain (483.7 kg per inhabitant) (INE, 2019).

In some tourist municipalities, waste generation in 2017 reached 964 kg per inhabitant (Adeje, Tenerife) or 1,172 kg (Yaiza, Lanzarote) (Diaz-Fariña et al., 2020).

Latest indicators

Contribution of the tourism sector (accommodation and restaurants) to the generation of mixed waste is 19% in 2019 (Díaz-Fariña et al., 2020).

Volume of sorted waste (recycling effort). Estimated recycling rates are around 13% of total municipal waste for 2018.

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

SOURCE: ELABORATED BY AUTHORS FROM DÍAZ-FARINA ET AL., 2020

Comparative evolution of the selective collection as a proportion of total waste (%)

SOURCE: URBAN WASTE COLLECTION. INE SERIES

BALEARIC ISLANDS · SPAIN · CANARY ISLANDS
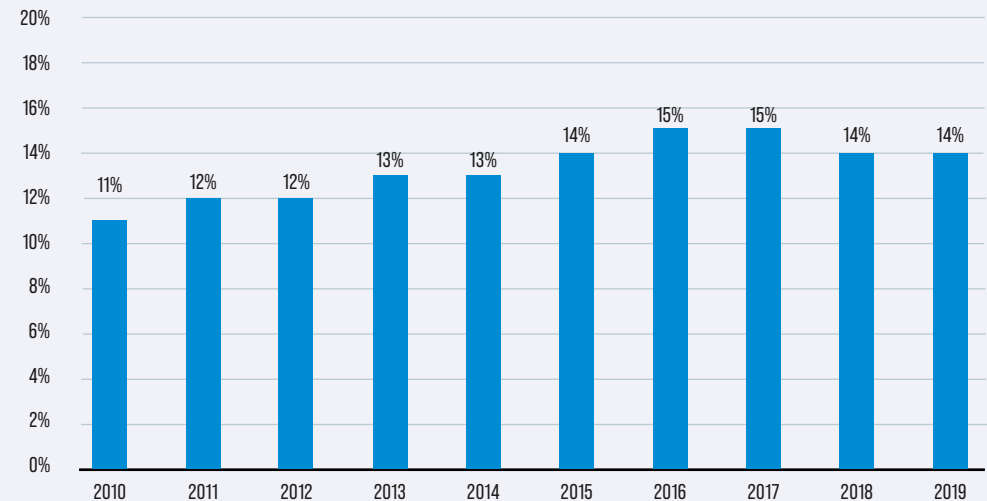
Contribution of accommodation and restaurants to the generation of mixed waste in the Canary Islands

SOURCE: DÍAZ-FARIÑA ET AL. (2020)
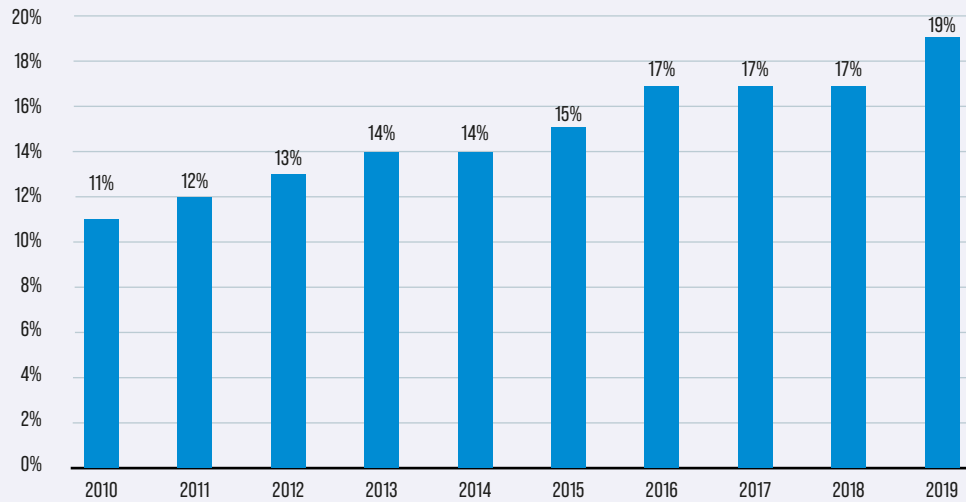
Further research

Waste management awareness in tourism.

Specific indicators for measuring the waste generated from tourism related industries.

Tourism direct and indirect waste production.

Challenges

Changes in waste management awareness in tourism. Tourism waste is currently characterized as municipal solid waste including residential and tourism generation (Díaz- Fariña et al., 2020).

A local effort is necessary to measure, monitor and make visible the different waste fractions generated by the tourism sector.

Incentives to reduce waste generation or to sort waste.

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

Indicator	Description	Availability	Source	Remarks
Mixed waste volume produced by destination (pressure)	Tons per resident per year	Partially available / occasional	Statistics on the Collection and Treatment of Waste (INE) Academic research	Regular data on solid waste production and management by tourism characteristic activities are 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	Partially available / occasional	Statistics on the Collection and Treatment of Waste (INE) Academic research	Regular data on solid waste production and management by tourism characteristic activities are needed

4.10. Climate change impacts and mitigation

Highlights

The Canary Islands, due to their extreme dependence on fossil fuels, have a high GHG emission rate.

According to the types of GHG, CO_2 is the most abundant, accounting for 87.5% of the total, followed by methane, which accounts for 8.6% (Anuario energético de Canarias, 2020).

According to the sources of GHG emissions, the most important is the "energy processing" sector, which contributed 87.9% of total GHG emissions in 2019. The second sector with the highest GHG emissions is "treatment and disposal of waste" with 8% of total GHG emissions in 2019 (Anuario energético de Canarias, 2020).

Biodiversity loss is expected to be one of the major impacts of climate change, which may be irreversible, though sometimes barely perceptible.

Increased frequency and intensity of extreme weather events and rising temperatures are other impacts of climate change.

Latest indicators

Total greenhouse gas emissions: In 2019, 13,037.85 Gg CO_2-eq (a decrease of -2.5% compared to 2018) and +50% compared to 1990 (Anuario energético de Canarias, 2020).

Per capita greenhouse gas emissions: In 2019, 6.05 tCO_2-eq/hab (Anuario energético de Canarias, 2020).

Percentage distribution, by category, of GHG emissions in the Canary Islands (2019)

SOURCE: ANUARIO ENERGÉTICO DE CANARIAS, 2020

8%
WASTE TREATMENT AND DISPOSAL

1,40%
AGRICULTURE

2,70%
INSDUSTRIAL PROCESSES

87,90%
ENERGY PROCESSING
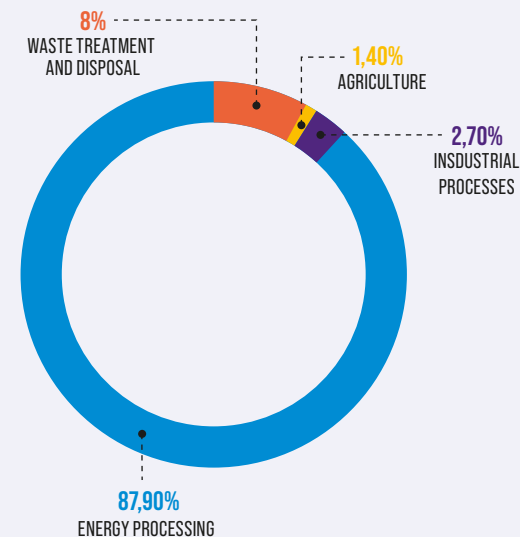
A recent study estimates that the worst-case climate scenario of 2050 could affect 147 tourist beaches. Loss of 10.6% surface area and a productive value of more than €1,000M per year (Government of Canary Islands, 2022).

Evolution of greenhouse gas emissions in the Canary Islands

SOURCE: ANUARIO ENERGÉTICO DE CANARIAS, 2020
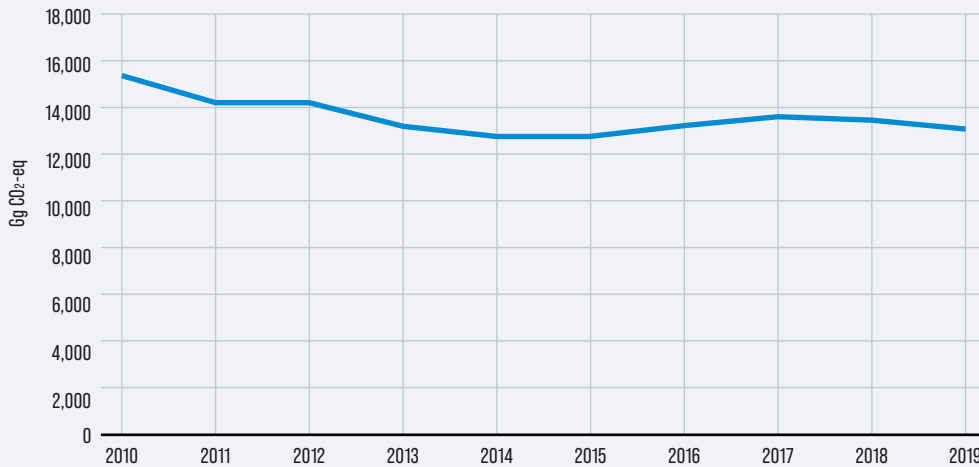
Opportunities

The emissions in the Canary Islands can significantly be reduced with the implementation of circular economy policies.

Implementation of more sustainable mobility policies.

The tourism sector can benefit from destination efforts to reduce emissions and cutting energy costs.

Reducing emissions can improve the image of the destination in origin countries.

Monitoring emissions of firms and tourist consumption is a first step to reduce emissions.

Further research

Available information is related to the Canary Islands in general. There is a need to obtain data on tourism and climate action indicators.

Climate change mitigation and adaptation in tourism.

Checklist of main indicators of issue area 10: Climate action

Indicator	Description	Availability	Source	Observations
Total greenhouse gases emissions	Tons of CO_2 equivalent of total gases	Partially available	Energy Yearbook. Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias	Regular data on greenhouse gases emissions by tourism characteristic activities are needed
Per capita greenhouse gases emissions	Tons of CO_2 equivalent of total gases/ Population	Partially available	Energy Yearbook. Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias	
Share of greenhouse gases emissions by economic sectors	Tons of CO_2 equivalent of emissions by economic sector / Total greenhouse gases emissions	Partially available	Energy Yearbook. Consejería de Transición Ecológica, Lucha contra el Cambio Climático y Planificación Territorial, Gobierno de Canarias	

4.11. Governance

Highlights

There is no detailed information on the coordination and cooperation among the agents of the destination.

A regional tourism strategy including the commitment of all stakeholders is needed.

Main tourism responsibilities lay on the islands councils.

Latest indicators

Governance effectiveness. 57% of the local population is highly or moderately satisfied with the tourism services provided by Canary Islands Government (ISTAC, 2021).

Satisfaction of public services in the Canary Islands: In 2021, 45.8% of the local population is moderately dissatisfied with public administrations (all of them as a whole) and 10.3% wholly dissatisfied (ISTAC).

Public Administration: In 2021, 44.7% of local population is moderately or highly satisfied with the Government of Canary Islands. 37% of local population is moderately or highly satisfied with State Administration.

Further research

Monitor tourism governance as a key objective.

Identify and analyze the existing relationships between the network of public and private tourism stakeholders.

Satisfaction with Tourism services provided by Canary Islands Government (2021)

SOURCE: ISTAC

- 4% DK/DA
- 8% WHOLLY DISSATISFIED
- 13% HIGHLY SATISFIED
- 34% MODERATELY DISSATISFIED
- 41% MODERATELY SATISFIED
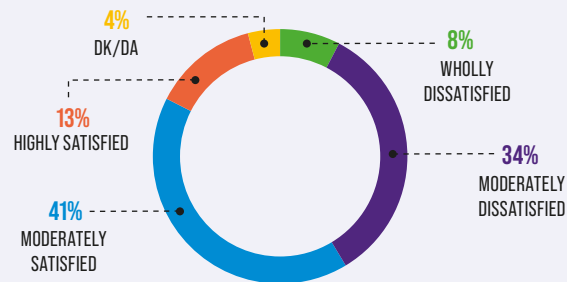
Satisfaction with services provided by Canary Islands Government (2021)

SOURCE: ISTAC. NOTE: IT INCLUDES HIGHLY AND MODERATELY SATISFIED

SECURITY AND EMERGENCY	68%
TOURISM	57%
COMMERCE	56%
CULTURE AND SPORT	54%
TRANSPORTS	54%
EDUCATION	53%
HEALTH SERVICES	48%
EQUALITY	46%
YOUTH	38%
JUSTICE	38%
PUBLIC WORKS	35%
AGRICULTURE, LIVESTOCK AND FISHERIES	35%
INDUSTRY AND ENERGY	33%
SOCIAL INCLUSION AND FIGHT AGAINST POVERTY	25%
EMPLOYMENT	16%
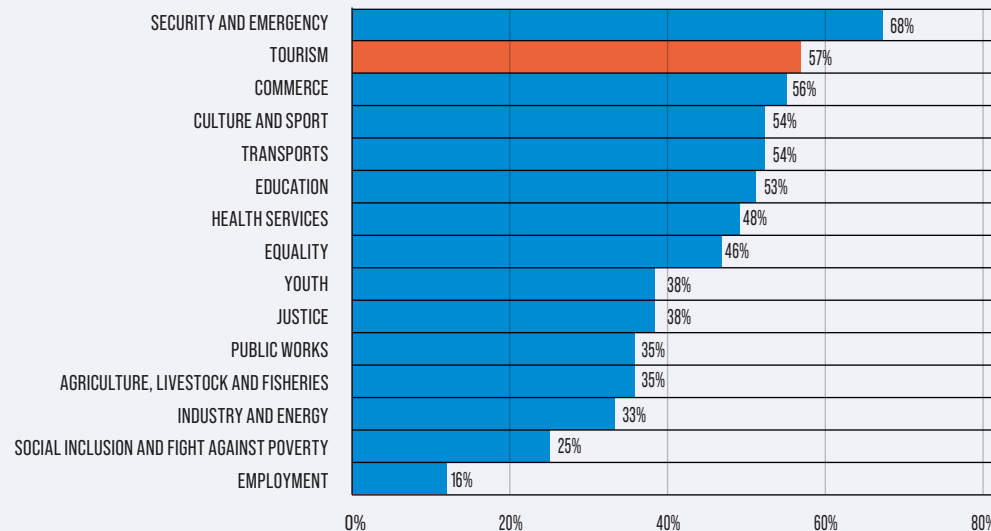
Challenges

Clearly define common priorities of action and a roadmap for the tourism sector in post pandemic times.

Strengthen coordination among different scales of the public sector, from the European Union, to the Country, the Autonomous Community (regional scale), the islands and the municipalities.

Strengthen horizontal coordination of tourism with different departments of the public sector: agriculture, infrastructures, environment, education, culture, sports, innovation, land planning.

Strengthen destination management organisations.

Strengthen the network of tourism stakeholders and their relationships.

Satisfaction with services provided by Public Administrations (%) (2021)

SOURCE: ISTAC

■ WHOLLY DISSATISFIED ■ MODERATELY DISSATISFIED ■ MODERATELY SATISFIED ■ HIGHLY SATISFIED ■ DK/NA
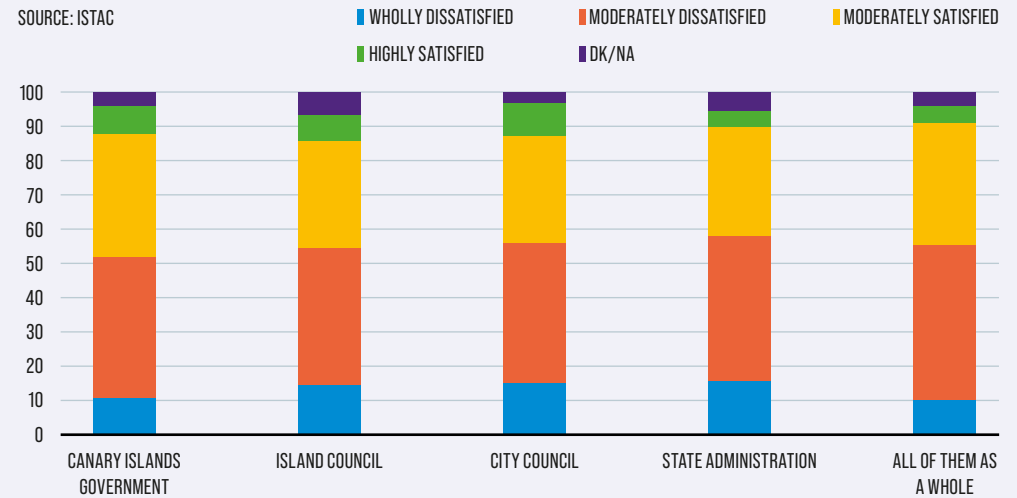
Checklist of main indicators of issue area 11: Governance

Indicator	Description	Availabilty	Source	Remarks
Government effectiveness	It reflects perceptions of the quality of public services that involve the areas included in the tourism system, the quality and readiness of policy formulation and its execution, as well as the credibility of the public administration	Partially Available / Occasional	Encuesta de Hábitos y Confianza Socioeconómica. Administraciones Públicas y Participación ciudadana (ECOSOC)	Indicators from statistical sources are needed
Participation	It reflects the inclusion level of the different groups of stakeholders in the decision-making of the tourist system of the territory, measured through mechanisms of representative and informal organization, perception of effectiveness, etc	Partially Available / Occasional	Encuesta de Hábitos y Confianza Socioeconómica. Administraciones Públicas y Participación ciudadana (ECOSOC)	Indicators from statistical sources are needed
Communication and responsibility	It reflects media and quality of communications between stakeholder groups, including different levels of public administration; fulfilment of commitments acquired according to levels of responsibility, existence of efficient mechanisms for the promotion of training, employment, gender equity and innovation	Not available		

4.12. Air transport connectivity and intermediation

Highlights

Air transport connectivity has been a priority for the region and the islands and is one of the mosts successful policies, awarded with international recognition. Connectivity is still an issue to be improved in islands with a less intense tourism development, such as La Palma.

Gran Canaria airport is the one with the highest number of passengers in the Canary Islands (6,818,862 in 2021) (AENA).

The dependence on airlines is added to the dependence on main European tour operators. 56% of tourists that arrived in 2019 to the islands have bought a tourism package (ISTAC).

Length of stay in 2019 with a tourism package 8.64 days; length of stay without a tourism package 9.68 days (Promotur)

Latest indicators

Number and frequency of direct routes from airports in the Canary Islands. Connectivity: 153 Destinations (mainly Madrid, Manchester and Barcelona); 770 Routes (Promotur, 2019).

United Kingdom (35 routes) and Germany (34 routes) are the countries with the largest number of routes with the Canary Islands in 2021 (AENA, 2021).

Airports and number of passengers (Millions) (2021)

SOURCE: AENA

Airport	Passengers
GRAN CANARIA AIRPORT	6.8
TENERIFE SOUTH AIRPORT	4.5
TENERIFE NORTH AIRPORT	3.8
LANZAROTE AIRPORT	3.4
FUERTEVENTURA AIRPORT	3.1
LA PALMA AIRPORT	0.7
EL HIERRO AIRPORT	0.2
LA GOMERA AIRPORT	0.1
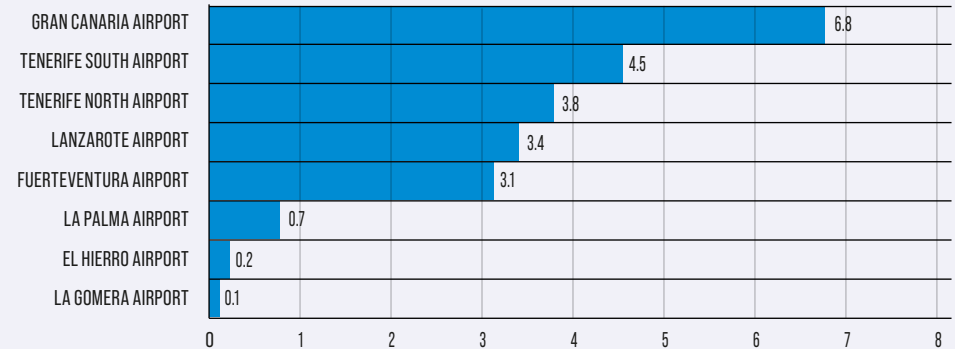
Countries with the largest number of routes to the Canary Islands

SOURCE: AENA

Legend: 2017 | 2019 | 2021

Country	2017	2019	2021
UNITED KINGDOM	36	35	35
GERMANY	31	30	34
FRANCE	34	28	23
ITALY	22	17	18
SWEDEN	22	18	17
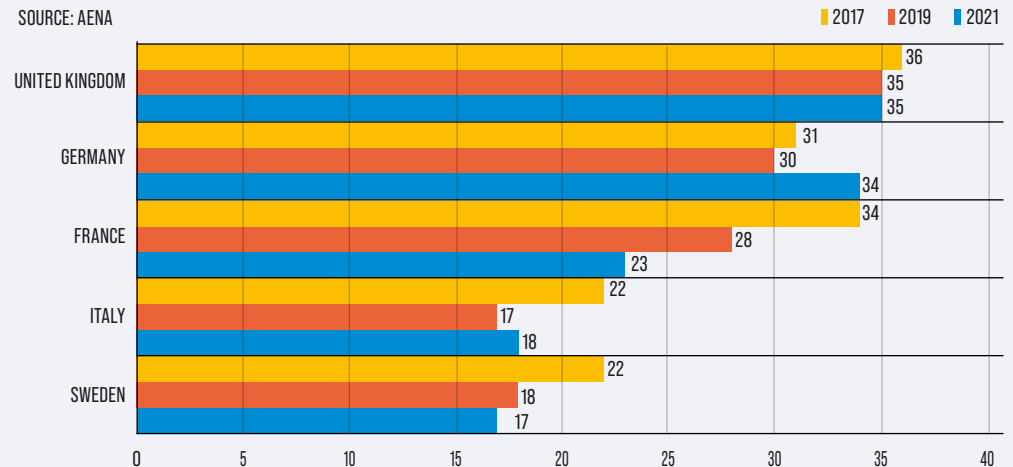
Further research

Satisfaction of tourists with air transport connectivity and intermediation.

Impacts of changes in intermediation in Europe.

Monitoring the emissions related to connectivity.

Challenges

Diversification of countries and regions of origin.

Promotion of visits to more than one island in a tourism trip.

Improving direct sales of accommodation without compromising airline connectivity.

Maintaining international connectivity in a context of global commitments on reduction of emissions.

Passenger arrivals (millions) (all origins) by airport of destination (2021)

SOURCE: AENA

UNITED KINGDOM ■ GERMANY ■ SPAIN ■ OTHER COUNTRIES
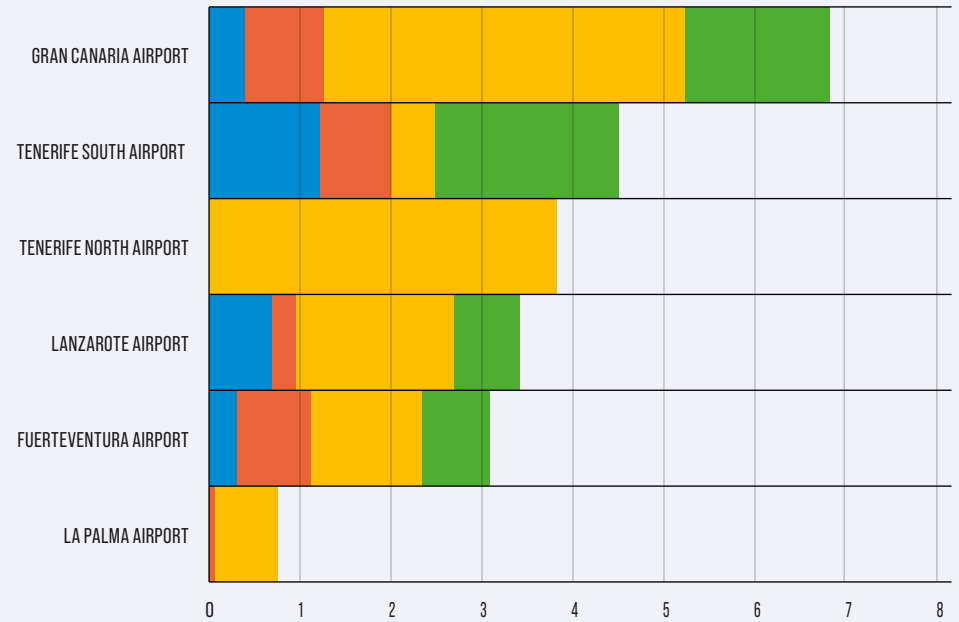
Checklist of main indicators of issue area 12: Air transport and intermediation

Indicator	Description	Availability	Source	Remarks
Number and frequency of direct routes from airports in the Canary Islands	Connectivity with a large number of airports is a crucial factor on the competitiveness of the tourist industry	Available	AENA	
The share of distribution channels and the number of operators	Share of tourists using tourist packages, OTAs and direct purchase of tourist products and number of intermediaries and airlines	Partially Available	Tourism Expenditure Survey (ISTAC)	
Monthly airline scheduled capacity	Airline capacity is measured through landing slots, as a way of forecasting the tourism trends for a region dependent on airlines	Available	AENA	

4.13. Mass tourism and overtourism

Highlights

47 micro-destinations have been identified for statistical purposes in the Canary Islands. These micro-destinations show a high concentration of accommodation bed-places. For confidentiality reasons, micro-destinations must have at least 500 bed-places and a number of establishments enough to keep statistical confidentiality.

89.3% of nights spent in tourist accommodation are located in only 1.76% of the total surface area of the region (micro-destinations).

Main tourist areas are often separated from residential zones.

There is not a general problem of overcrowding and overtourism, but there are relevant issues related to traffic congestion and congestion of certain natural areas.

Management of negative effects of tourist concentration in certain spots has been hardly implemented.

Even distribution of tourist arrivals along the whole year helps to prevent overtourism problems from arising.

The Canary Islands shows an average of 75 accommodation places by km². This indicators ranges from 107 in Lanzarote to 10 in El Hierro.

The Canary Islands shows an average of 0.26 bedplaces by inhabitant. This figure ranges from figure of 0.69 in Fuerteventura to 0.19 in La Palma and Gran Canaria.

The average number of inhabitants and tourists staying daily by square kilometer 325.2. This figure ranges from 596.3 in Gran Canaria and 497.0 in Tenerife to 41.7 in El Hierro.

The municipality with the highest ratio of tourist bed-places by inhabitant is Mogan (Gran Canaria) with almost 2 tourist bed-places by inhabitant.

The micro-destinations of Playa del Inglés (Gran Canaria) and Costa Adeje (Tenerife) show the highest concentration of bed-places. Both micro-destinations are over 14,000 bed-places in hotels and apartments by square kilometer.

Playa del Inglés (Gran Canaria), with only 3.23 square kilometers, generated in 2019 more than 10 million night stays in hotels and apartments.

Latest indicators

68% of tourists would be willing to spend extra to reduce their carbon footprint (30% declare to be willing to spend up to 5% more; 24.3% are willing to spend up to 10% more; 8% are willing to spend up to 20% more; 5.6% are willing to spend over 20% more) (ISTAC, 2022).

Tourists rate in 2022 the overcrowding of tourist areas: 6.68 (on a scale 1 to 10). It is the sustainability item with the lowest rating (ISTAC).

23% of tourists declare to choose the most sustainable options when booking a trip even if it entails some inconvenience (ISTAC, 2022).

The sustainability issue best rated by tourists is the tolerance of local population towards tourism.

Perception of sustainability measures (2022 Q1)

SOURCE: ISTAC (2022).
NOTE: RATE YOUR PERCEPTION OF THE FOLLOWING SUSTAINABILITY MEASURES DURING YOUR STAY. SELECT 1 TO 10, WHERE 0 IS "NOT IMPORTANT" AND 10 IS "VERY IMPORTANT".

Measure	Rating
TOLERANCE OF THE POPULATION TOWARDS TOURISM	8.54
AIR QUALITY	8.45
CLEANLINESS OF THE ISLAND	8.27
PERCEIVED QUALITY OF LIFE ON THE ISLAND	8.06
EASY TO GET AROUND BY PUBLIC TRANSPORT ON THE ISLAND	7.33
RATIONAL WATER CONSUMPTION IN ACCOMMODATIONS, RESTAURANTS, PUBLIC PLACES	7.33
OFFER OF LOCALPRODUCTS AT POINTS OF SALE	7.07
RECYCLING IN ACCOMMODATION, RESTAURANTS, ETC.	7.06
USE RENEWABLE ENERGY	6.98
ENERGY SAVINGS IN ACCOMMODATION, RESTAURANTS, PUBLIC PLACES	6.87
EXCESIVE CROWDS IN TOURISTIC AREAS	6.68

Canary Islands, residents and equivalent tourist population (2019)

SOURCE: ISTAC (2019). VACATION HOMES PLACES (BED PLACES): EL ALQUILER VACACIONAL EN CANARIAS: DEMANDA, CANAL Y OFERTA (GOVERNMENT OF CANARY ISLANDS, 2019)

NOTE: THE TABLET CONCEPT OF EQUIVALENT TOURIST POPULATION PUBLISHED BY ISTAC REFERS TO THE AVERAGE OF TOURISTS STAYING IN HOTELS AND APARTMENTS (IT DOES NOT INCLUDE VACATION HOMES) EVERY DAY (NUMBER OF STAYS DIVIDED BY NUMBER OF DAYS).

Canary Islands	Surface (km²)	Official inhabitants	Vacation homes places (beds)	Accommodation places (hotels and apartments)	Total places (including vacation homes)	Overnight stays in hotels and apartments	Equivalent tourist population (hotels + apartments)	Total places / Official inhabitants	Total places/ km²	Official population + equivalent tourist population / Surface
Canary Islands	7,446.95	2,153,389	163,205	395,016	558,221	97,964,361	268,396	0.26	75	325.2
Tenerife	2,034.38	917,841	63,944	132,144	196,088	34,034,766	93,246	0.21	96	497.0
Gran Canaria	1,560.10	851,231	40,978	122,989	163,967	28,845,156	79,028	0.19	105	596.3
Lanzarote	845.94	152,289	23,985	66,323	90,308	18,176,327	49,798	0.59	107	238.9
Fuerteventura	1,659.74	116,886	20,300	60,236	80,536	14,312,350	39,212	0.69	49	94.0
La Palma	708.32	82,671	8,526	7,539	16,065	1,553,093	4,255	0.19	23	122.7
La Gomera	369.76	21,503	3,573	5,041	8,614	958,786	2,627	0.40	23	65.3
El Hierro	268.71	10,968	1,899	745	2,644	83,883	230	0.24	10	41.7

Indicators for main tourism municipalities (2019)

SOURCE: ISTAC (2019). NOTE: THE TABLET CONCEPT OF EQUIVALENT TOURIST POPULATION PUBLISHED BY ISTAC REFERS TO THE AVERAGE OF TOURISTS STAYING IN HOTELS AND APARTMENTS (IT DOES NOT INCLUDE VACATION HOMES) EVERY DAY (NUMBER OF STAYS DIVIDED BY NUMBER OF DAYS).

Main tourism municipalities	Surface (km²)	Official inhabitants	Vacation homes places (beds)	Accommodation places (hotels and apartments)	Total places (including vacation homes)	Overnight stays	Equivalent tourist population	Total places / Official inhabitants	Total places / km²
San Bartolomé de Tirajana (Gran Canaria)	333.13	53,443	13,252	81,181	94,433	18,990,023	52,027	1.77	283
Adeje (Tenerife)	105.95	47,869	12,881	46,648	59,529	13,105,945	35,907	1.24	562
Arona (Tenerife)	81.79	81,216	10,701	41,159	51,860	10,093,577	27,654	0.64	634
Mogán (Gran Canaria)	172.44	20,072	5,545	33,636	39,181	8,279,475	22,683	1.95	227
Pájara (Fuerteventura)	383.52	21,093	3,230	35,584	38,814	8,390,146	22,987	1.84	101
Tías (Lanzarote)	64.61	20,170	6,562	26,123	32,685	6,988,017	19,145	1.62	506
Yaiza (Lanzarote)	211.85	16,571	6,871	20,631	27,502	5,642,547	15,459	1.66	130
Puerto de la Cruz (Tenerife)	8.73	30,468	3,033	21,340	24,373	5,492,551	15,048	0.80	2,792
La Oliva (Fuerteventura)	356.13	26,580	10,140	13,148	23,288	3,134,045	8,586	0.88	65
Teguise (Lanzarote)	263.98	22,342	4,098	16,373	20,471	4,792,756	13,131	0.92	78

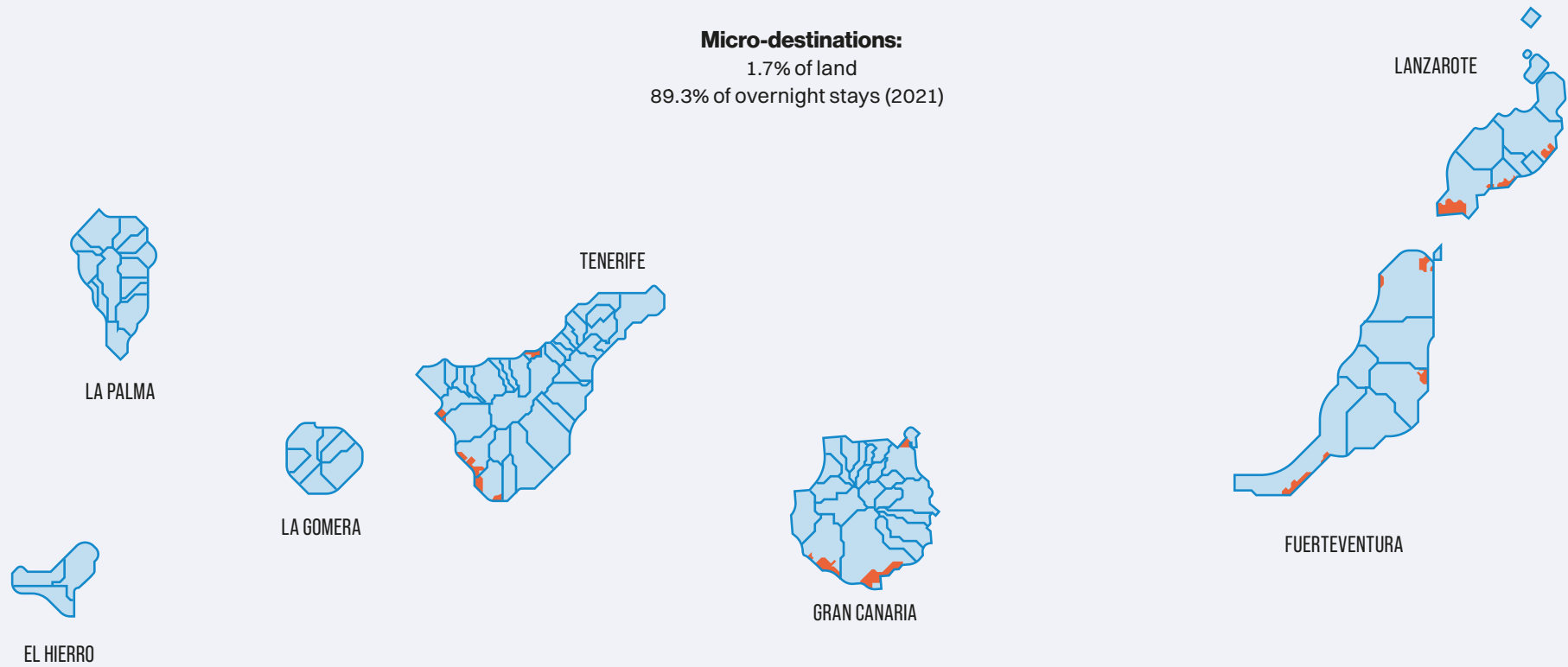## Indicators for main tourism micro-destinations (inframunicipal) (2019)

SOURCE: ISTAC (2019). NOTE: THE TABLET CONCEPT OF EQUIVALENT TOURIST POPULATION PUBLISHED BY ISTAC REFERS TO THE AVERAGE OF TOURISTS STAYING IN HOTELS AND APARTMENTS (IT DOES NOT INCLUDE VACATION HOMES) EVERY DAY (NUMBER OF STAYS DIVIDED BY NUMBER OF DAYS).

Main tourism micro-destinations	Superface (km²)	Accommodation places (hotels and apartments)	Overnight stays	Equivalent tourist population	Accommodation places (hotels and apartments)/ (km²)
Playa del Inglés (Gran Canaria)	3.23	46,220	10,483,671	28,722	14,313
Las Américas-Arona (Tenerife)	2.66	27,651	7,152,298	19,595	10,408
Costa Adeje (Adeje, Tenerife)	1.37	19,271	5,531,091	15,154	14,095
Costa Teguise-Litoral (Lanzarote)	3.06	14,303	4,202,508	11,514	4,672
Esquinzo- Butihondo (Morro Jable, Fuerteventura)	5.89	13,974	3,518,939	9,641	2,373
Corralejo (Fuerteventura)	6.67	12,643	3,021,716	8,279	1,895
Matagorda- Los Pocillos (Puerto del Carmen, Lanzarote)	3.05	12,334	3,395,663	9,303	4,042
Costa Calma (Fuerteventura)	3.36	12,312	2,977,431	8,157	3,669
Playa de El Duque (Adeje, Tenerife)	3.57	11,864	2,466,563	9,497	3,326
Los Cristianos (Tenerife)	3.32	11,229	2,436,061	6,674	3,383

Concentration of the tourism activity in the Canary Islands. 47 microdestinations

■ MICRO-DESTINATIONS

Micro-destinations:
1.7% of land
89.3% of overnight stays (2021)

LANZAROTE

TENERIFE

LA PALMA

LA GOMERA

FUERTEVENTURA

GRAN CANARIA

EL HIERRO

Main indicators of issue area 13: Mass Tourism and overtourism

Indicator	Availability	Source	Remarks
Ratio of accommodation places to surface	Available	Accomodation Survey (ISTAC) and data on surface (ISTAC)	Total accommodation places including hotels, apartments and vacation homes
Ratio of accommodation places to official inhabitants	Available	Accommodation Survey (ISTAC) and data on surface (ISTAC)	Total accommodation places including hotels, apartments and vacation 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 renovation

Highlights

15.115,709 tourist arrivals (ISTAC, 2019). 1,602 total accommodation establishments open (ISTAC, 2019).

97,964,361 overnight stays in hotels and apartments (ISTAC, 2019).

Stability of tourism accommodation supply in hotels and apartments during the last decade.

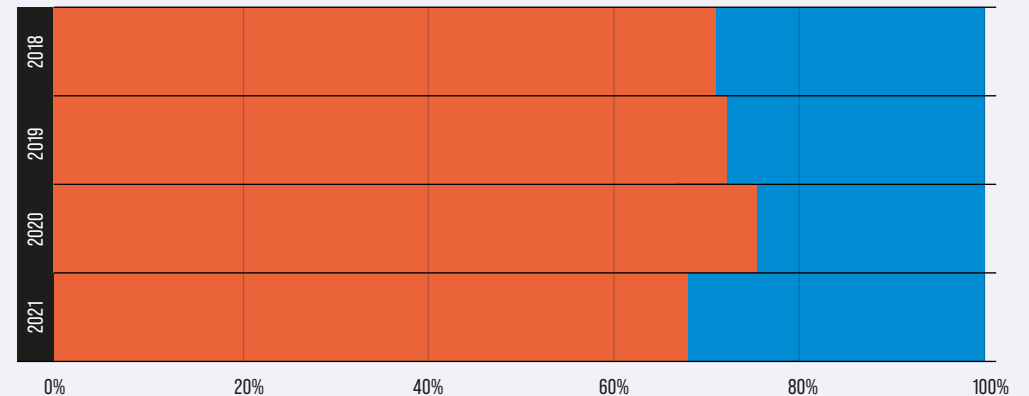Average growth of private tourism investment of 8.5% in the period of 2015-2019 (IMPAC-TUR, 2020).

Investment by branches of activity, hotels and similar (50%); Transportation and related activities (8,9%); Restaurants and similar (8,4%) (IMPACTUR, 2020).

High share of repeat tourists.
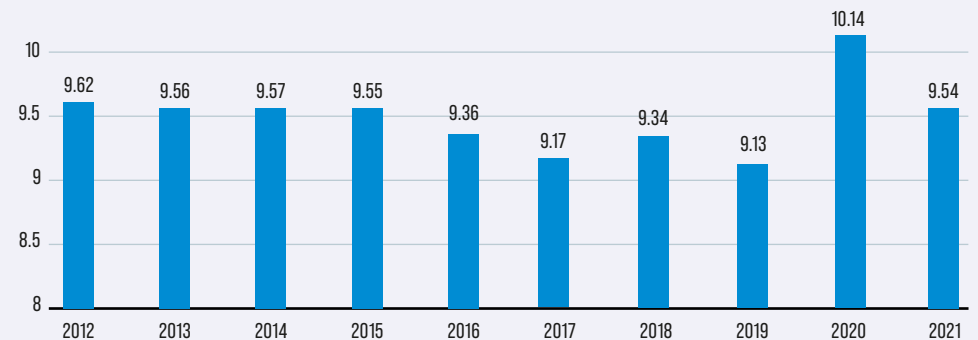
Repeat vs. first-time visitors

SOURCE: ISTAC

■ REPEATERS   ■ FIRST-TIME VISITORS

Average length of stay (days)

SOURCE: EGT - ISTAC

Latest indicators

Average stay 9.54 days (2021); 9.13 days (2019).

€14,903,179,516 tourist expenditure in total (ISTAC).

 32% of tourists visit the Canary Islands for the first time (ISTAC, 2021).

Future research

Investment in new tourism assets and renovation.

Perceptions of renovation and obsolescence among tourists.

Rates of renovation of each micro-destination.

Challenges

Adapt the renewal of the offer to the changes that are taking place in the behaviour of tourists, particularly since the pandemic.

Despite being a long-established destination, maintain an image of modernity and renewal in the eyes of tourists.

Incorporate risk management into the renovation strategy.

Open bed places in hotels and apartments

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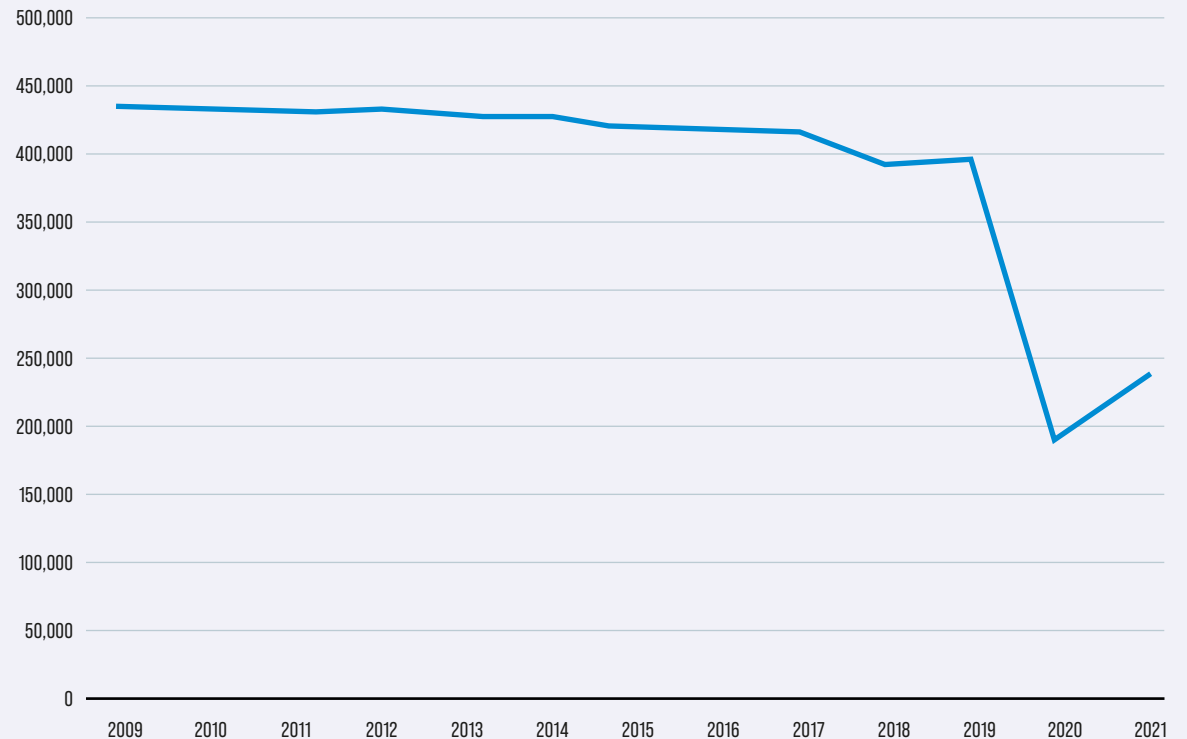
Checklist of main indicators of issue area 14: Maturity of the destination and renovation

Indicator	Description	Availability
Investment in new tourism assets	Construction of new tourist accommodation and equipment	Not available
Tourism renovation investment	Investment in renovation of private spaces (housing and equipment offer) and public areas	Not available
Renovated tourist bed places	Number of bed places renewed and year of renewal	Not available
Perception of tourists about renovation of the destination	Perceived image of the renovation	Not available

4.15. Natural capital supporting tourism. Protected areas and fragile ecosystems

Highlights

The Canary Islands are among the 15 richest biodiversity regions on the earth (Biodiversity Data Bank of the Canary Islands).

Representative ecosystems exhibit high vulnerability. Different factors add pressure to habitats (coastal tourist and residential urbanism).

4 National Parks, which are among the 10 most visited in Spain.

Biosphere reserves: La Palma; Lanzarote; El Hierro; Gran Canaria (46% of the island); Fuerteventura; La Gomera and Anaga Massif in Tenerife.

Marine areas are amongst the most attractive ones for diving, receiving every year thousands of divers from all over Europe.

Latest indicators

174 Special Areas of Conservation with a total of 454,932 ha, of which 283,322 are terrestrial and 171,610 marine; in addition to 43 Special Protection Areas for Birds, with 271,251 ha of land and 6,056 of marine areas (according to Natura 2000 criteria).

The Canary Islands have more than 4,000 endemic species, which means approximately one endemism per two km² of surface area. In total, there are more than 17,000 terrestrial and marine species (Biodiversity Data Bank of the Canary Islands).

The Canary Islands' Network of Protected Natural Spaces is made up of 146 protected areas (40% of the total land) (Gobierno de Canarias).

Marine Reserves of Fishing Interest in Northern Lanzarote and western El Hierro and on La Palma covering more than 75,000 ha.

Challenges

The Canary Islands must take advantage of their exclusive nature to differentiate themselves from other destinations and add more value to visitors' experiences.

Make compatible responsible tourist visits and the conservation of natural protected areas.

Development of nature based tourism activities without negatively affecting the environment.

Further research

An information system to provide more relevant information on motivations, activities and satisfaction when visiting the areas.

Management of natural areas to allow visits while promoting conservation.

Tourists who give high importance to natural assets when choosing the Canary Islands as their travel destination (2018-2021)
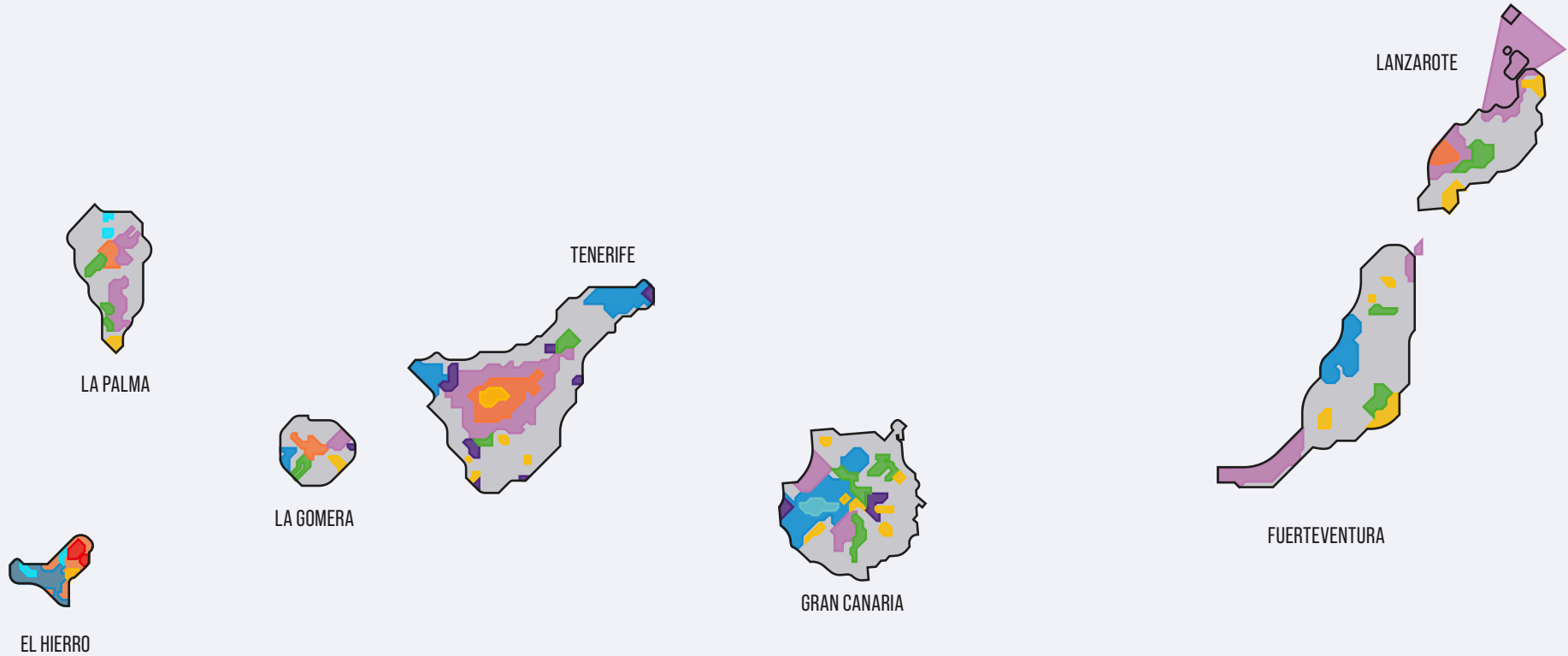
SOURCE: ISTAC   ■ LANDSCAPES   ■ NATURAL ENVIRONMENT   ■ TRAIL NETWORK
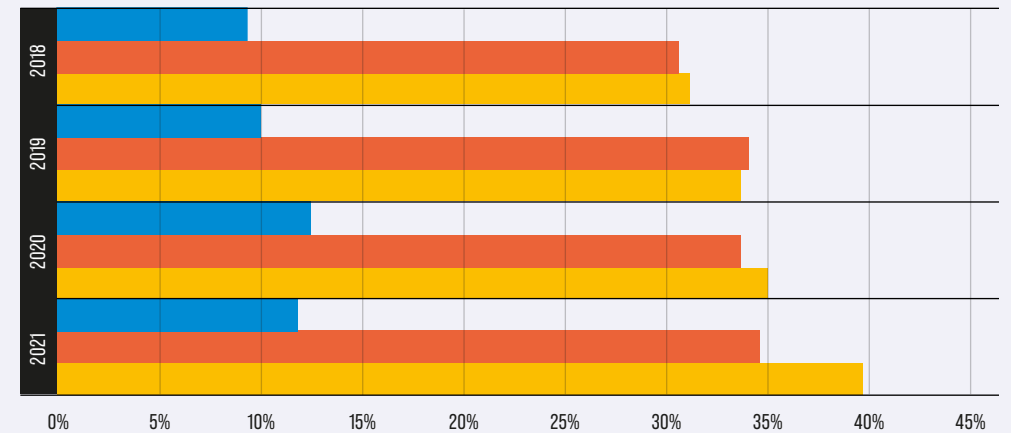
Natural Protected Areas of the Canary Islands

■ SITE OF SCIENTIFIC INTEREST ■ INTEGRAL NATURAL RESERVE ■ SPECIAL NATURAL RESERVE ■ RURAL PARK ■ NATURE PARK ■ PROTECTED LANSCAPE ■ NATIONAL MONUMENT ■ NATIONAL PARK

LANZAROTE

TENERIFE

LA PALMA

LA GOMERA

FUERTEVENTURA

EL HIERRO

GRAN CANARIA

Checklist of main indicators of issue area 15: Natural capital supporting tourism. Protected areas and fragile ecosystems

Indicator	Descriprion	Availability	Source	Remarks
Percentage of protected land exhibiting high conservation status (according to Natura 2000 criteria)	Natura 2000 conservation network has a uniform scale for assessing the conservation status of all European protected areas belonging to it	Available	Government of the Canary Islands	It allows comparability between territories
Number and percentage of flagship species for tourism (birds, marine mammals, reptiles) that are threatened	Flagships species are those that attract visitors	Available	Government of the Canary Islands	Once experts in nature-based tourism provide the list of the relevant ones, experts in conservation would provide their conservation status
Percentage of protected areas having effective management (conservation head and staff, annual plan being assessed)	Management quality is critical for the conservation and valorization of protected natural areas	Partially available	Government of the Canary Islands	For this purpose, having management staff and ex post assessed plans are required
Number and surface of land and marine spaces managed under social safekeeping schemes	Natural habitats and landscapes relevant for tourism are much more than those protected by law	Available	Government of the Canary Islands	Non-protected valuable land can also be conserved through social safekeeping schemes, currently coming up all over Europe and in the Canary Islands
Tourists' satisfaction with landscapes and protected areas		Partially available	Survey of Tourist Expenditure (ISTAC)	It provides feedback about the results of efforts to preserve nature using a Likert scale

4.16. Universal accessibility and inclusivity

Highlights

The lack of information in the collection of data on accessibility is manifested in the lack of specific indicators in this matter.

Arona, in the South of Tenerife, is one of the case studies of tourism accessibility with the recognition of the European Commission.

In the Canary Islands 27% of the itineraries are suitable for autonomous and safe ambulation (National average 29%) (Hernández-Galán et al., 2021).

54 Blue Flag Beaches in the Canary Islands in 2022.

Results indicate the need for remodeling and adaptation of infraestructures and public spaces for the correct adaptation to the needs in accessibility.

Latest indicators

Infrastructure accessibility. Building whose use and services are suitable for all the people: 10% Canary Islands. National average: 17% (Hernández-Galán et al., 2021).

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

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

Opportunities

Accessible tourism could be a differentiating factor in the market.
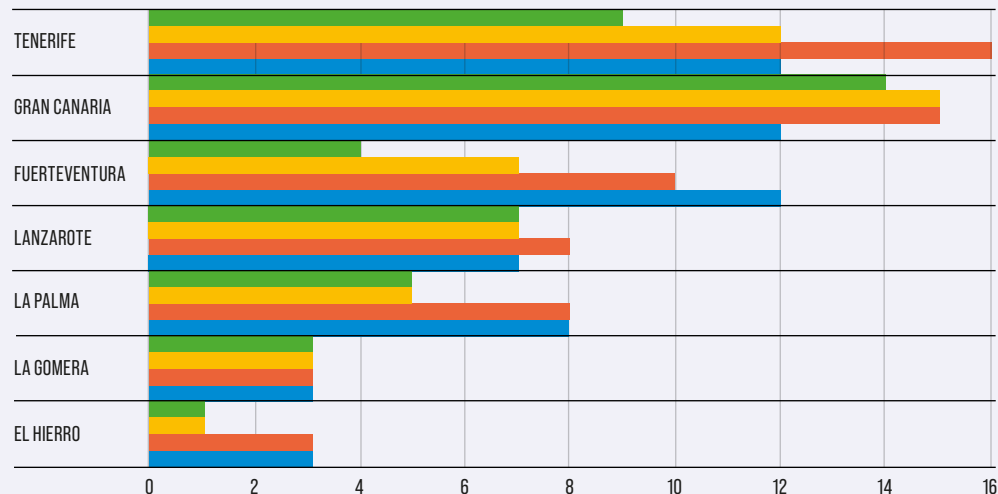
Development of accessible tourism to reduce seasonality and diversify the supply.

Tourist supply promoting accessibility can increase the length of stay.

Blue Flag Beaches in the Canary Islands

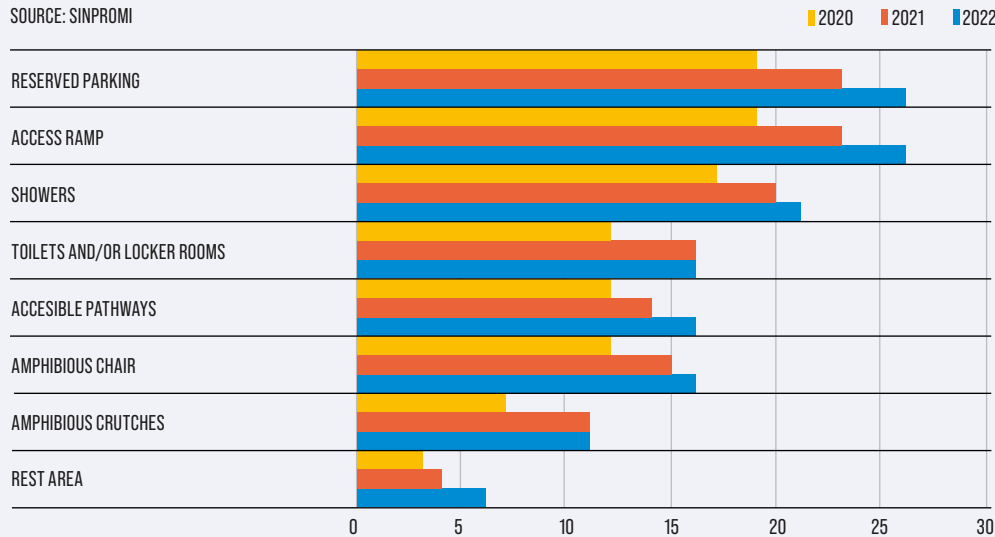SOURCE: GOVERNMENT OF THE CANARY ISLANDS   ■ 2019 ■ 2020 ■ 2021 ■ 2022
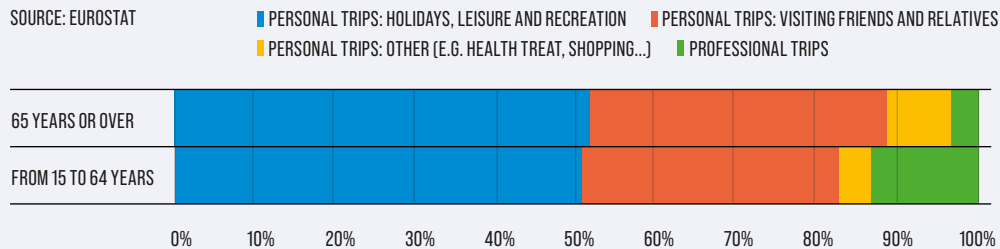
Accessible beaches in Tenerife

SOURCE: SINPROMI

■ 2020   ■ 2021   ■ 2022

- RESERVED PARKING
- ACCESS RAMP
- SHOWERS
- TOILETS AND/OR LOCKER ROOMS
- ACCESIBLE PATHWAYS
- AMPHIBIOUS CHAIR
- AMPHIBIOUS CRUTCHES
- REST AREA

Share of different purposes in the total number of trips made by EU residents (2019)

SOURCE: EUROSTAT

■ PERSONAL TRIPS: HOLIDAYS, LEISURE AND RECREATION   ■ PERSONAL TRIPS: VISITING FRIENDS AND RELATIVES
■ PERSONAL TRIPS: OTHER (E.G. HEALTH TREAT, SHOPPING…)   ■ PROFESSIONAL TRIPS

- 65 YEARS OR OVER
- FROM 15 TO 64 YEARS

Further research

Identify areas for improvement to increase accessibility and inclusiveness in tourism.

Level of implementation and local awareness about accessibility and inclusiveness policies in tourism.

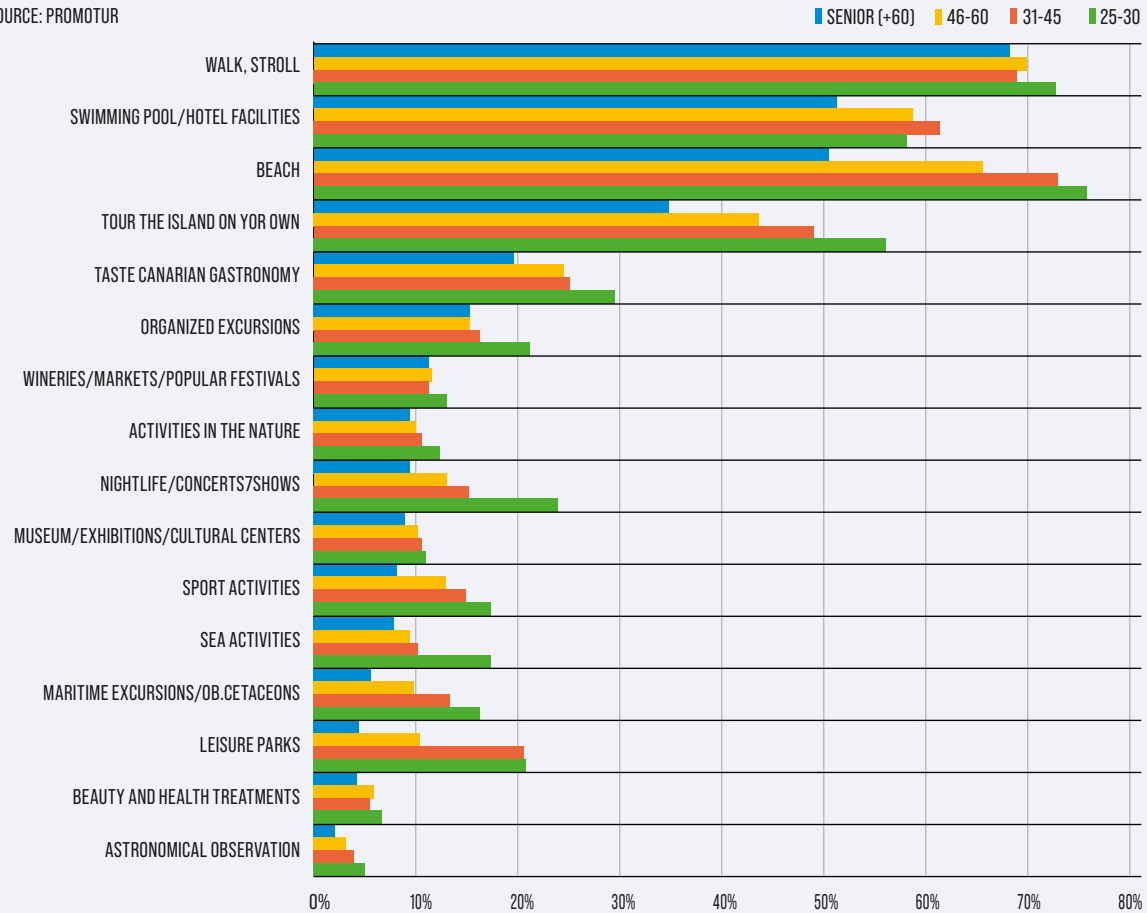Niche markets related to tourism accessibility and inclusiveness.

Length of stay of tourists in the Canary Islands by ages (2019)

SOURCE: PROMOTUR

SENIOR(+60)	46-60	31-45	25-30	16-24
11.7	8.7	8.2	7.6	8.5
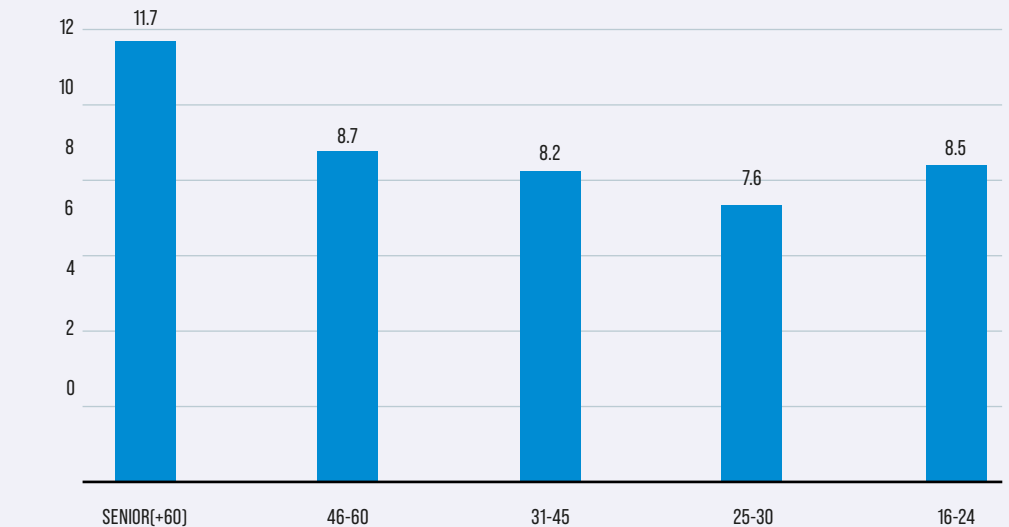
Activities carried out by tourists in the Canary Islands according to age (2019)

SOURCE: PROMOTUR

Legend: ■ SENIOR (+60) ■ 46-60 ■ 31-45 ■ 25-30

Categories (top to bottom):
- WALK, STROLL
- SWIMMING POOL/HOTEL FACILITIES
- BEACH
- TOUR THE ISLAND ON YOR OWN
- TASTE CANARIAN GASTRONOMY
- ORGANIZED EXCURSIONS
- WINERIES/MARKETS/POPULAR FESTIVALS
- ACTIVITIES IN THE NATURE
- NIGHTLIFE/CONCERTS7SHOWS
- MUSEUM/EXHIBITIONS/CULTURAL CENTERS
- SPORT ACTIVITIES
- SEA ACTIVITIES
- MARITIME EXCURSIONS/OB.CETACEONS
- LEISURE PARKS
- BEAUTY AND HEALTH TREATMENTS
- ASTRONOMICAL OBSERVATION

X-axis: 0%, 10%, 20%, 30%, 40%, 50%, 60%, 70%, 80%

Main indicators of issue area 16: Universal accessibility and inclusivity

Indicator	Description	Availability	Source
Local awareness of the accessibility and inclusiveness importance	Level of implementation of accessibility and inclusiveness policies	Not available	
Infrastructure accessibility	Share of hotels, public buildings, leisure services and cultural and natural sites with accessible facilities	Occasional data	CERMI (2021)
Transport accessibility	Public transport suitable for mobility challenges and accessible private transport supply	Occasional data	CERMI (2021)
Assistance assured	Local level of health coverage and distance to hospitals or medical facilities	Available	Government of the Canary Islands

5. Conclusions

▸ It is necessary to advance in the development of new indicators. More information is needed, more precise, published frequently and regularly from official sources. For certain issues, as water and wastewater management, only occasional research data is available.

▸ It is particularly necessary to promote the generation of indicators on governance, perception of the impacts of tourism, impacts of tourism on the environment, solid waste management, water and wastewater, mass tourism and overtourism and accessibility and inclusiveness. It is necessary to advance in indicators on employment and digitalization.

▸ It is important the commitment of all the scales of the public sector with the measurement of the tourism and the use of data for decision-making.

▸ It is important to promote the cooperation between different departments of the public sector in the areas of interest for tourism and sustainability.

▸ Many indicators are only available at the regional o island scale. For some indicators is important to obtain more detailed data on municipal and micro-destination scale.

▸ Big data analysis can be more extensively used to provide new data or more precise spatial and temporal information on tourism sustainability using new sources as tracking mobile phones, webs and apps, using information of firms providing water and energy, payment with cards, tracking rental cars.

▸ It is important to promote user-friendly access to data and reports on tourism sustainability to improve the knowledge of all stakeholders, including not only firms and the public sector but also local residents.

▸ Public and private decision-making in tourism and related areas must be increasingly based on data.

▸ The monitoring process must be based on a clear tourism strategy supported by the stakeholders. There is a need to make more explicit such strategy to focus the monitoring process on the challenges and priorities of the strategy.

▸ It is essential to promote the role of the Canary Islands in the generation of tourism knowledge on a global scale, working together with other organizations, with outstanding participation in European projects, knowledge networks and the hosting of meetings.

▸ It is necessary to promote open science and scientific knowledge on tourism with the participation of society and the sector, promoting frontier research and its application to priority lines, as well as structuring research networks, institutes, living and experimental laboratories, etc.

6. Main data sources

List of Abbreviations

ISTAC. The Canary Islands Statistics Institute: http://www.gobiernodecanarias.org/istac/

▸ Accommodation Survey / Encuesta de Alojamiento.
▸ Tourism Expenditure Survey / Encuesta de Gasto Turístico.
▸ FRONTUR. Tourist Movement on Borders Survey / Estadística de movimientos turísticos en frontera.
▸ Módulo de Vivienda Vacacional de la Encuesta de Hábitos y Confianza Socioeconómica (ECOSOC).
▸ Territory Statistics / Estadística del Territorio.
▸ Municipal Register of Inhabitants / Padrón Municipal de Habitantes.

INE. Spanish Statistical Office. https://www.ine.es/

▸ Statistics on the Collection and Treatment of Waste / Estadística sobre Recogida y Tratamiento de Residuos.
▸ Wage Structure Survey / Encuesta de Estructura Salarial.
▸ Survey on Water Supply and Sewerage / Estadística sobre el Suministro y Saneamiento del Agua.
▸ Spain Regional Accounts / Contabilidad Regional de España.
▸ Survey on ICT Usage and E-commerce in Enterprises / Uso de TIC y Comercio Electrónico en las Empresas.

FRONTUR. Tourist Movement on Borders Survey / Estadística de Movimientos Turísticos en Frontera.

EUROSTAT. European Statistical Office.

ISTAC. The Canary Islands Statistics Institute.

AROPE. At Risk Of Poverty and Exclusion.

INE. National Statistics Insititute.

IMPACTUR. Study on the economic impact of tourism (Exceltur and Canary Islands Government).

COTEC. The Cotec Foundation for Innovation.

PROMOTUR. Promotur Turismo de Canarias, S.A.

DGT. National Department of Traffic.

SINPROMI: Sociedad Insular para la Promoción de las Personas con Discapacidad, S.L.

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