Canary Islands Tourism Sustainability

Report 2024

Tourism Observatory of the Canary Islands

Cátedra de Turismo de las Islas Canarias de Sostenibilidad e Inteligencia de Datos

Gobierno de Canarias

ULPGC Universidad de Las Palmas de Gran Canaria

Universidad de La Laguna

UNWTO

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World Tourism Organization International Network of Sustainable Tourism Observatories

This document has been prepared by an inter-university research team from the University of La Laguna (ULL) and the University of Las Palmas de Gran Canaria (ULPGC), commissioned by the Canary Islands Chair of Tourism, Sustainability, and Data Intelligence (Cátedra de Turismo de las Islas Canarias de Sostenibilidad e Inteligencia de Datos). This document has been prepared for the Canary Islands Tourism Observatory, under the Ministry of Tourism and Employment of the Government of the Canary Islands, within the framework of the United Nations Tourism's International Network of Sustainable Tourism Observatories (INSTO). On 21st October 2020, at INSTO's annual meeting, the Canary Islands were approved as a member of the network.

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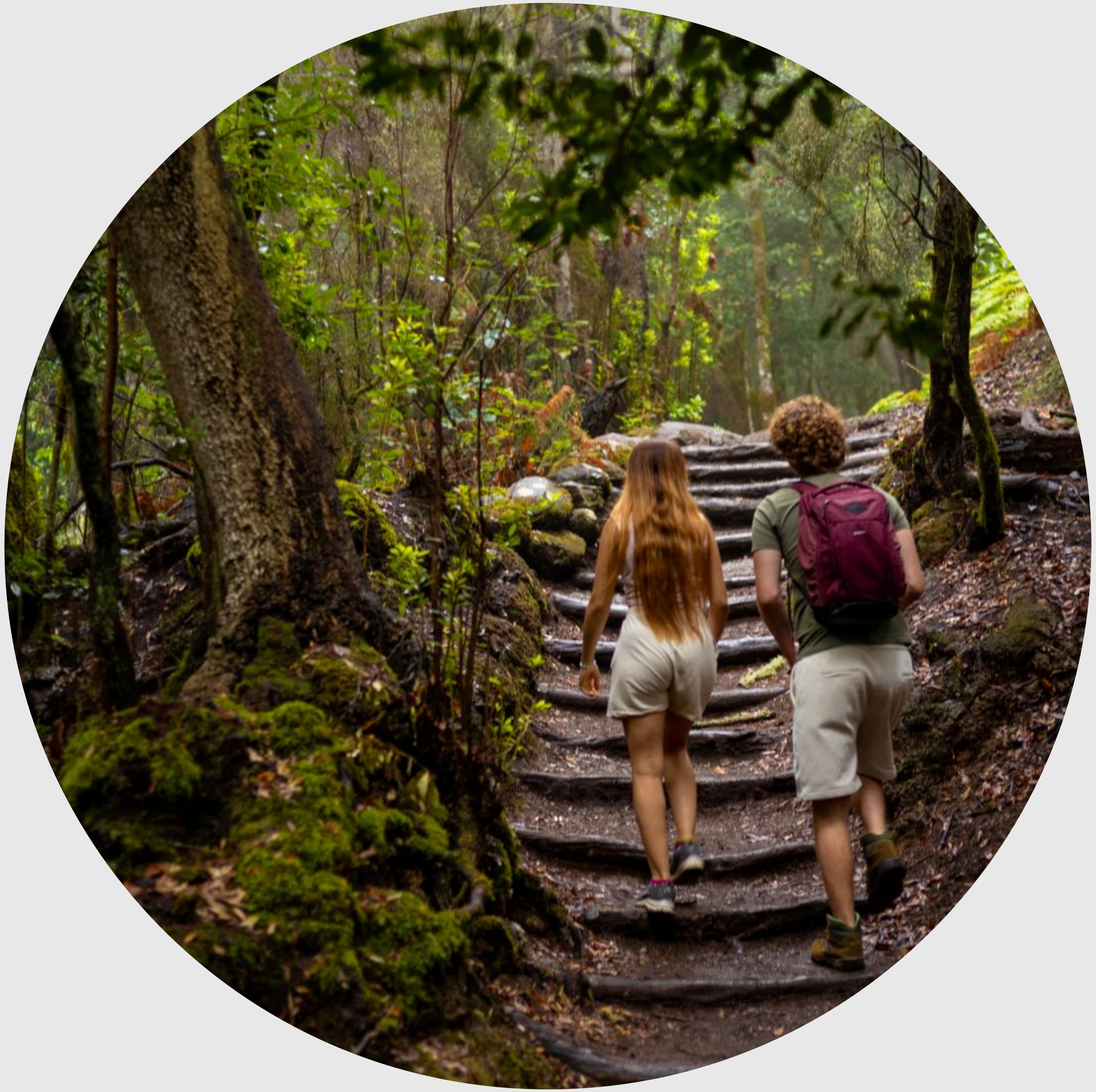


Presentation, introduction and executive summary

Presentation

As we have reiterated on numerous occasions, the Canary Islands Tourism Observatory, under the Vice-Ministry of Tourism of the Government of the Canary Islands, serves as an essential tool for the development of public policies in this area. It brings together all relevant information affecting the tourism sector in the islands, including the impacts of tourism on the destination, information which we share with all stakeholders involved in tourism activity in the Canary Islands.

The Canary Islands Tourism Observatory's membership in the International Network of Sustainable Tourism Observatories of UN Tourism (formerly UNWTO) not only endorses the global commitment of the Canary Islands, further reinforced by our Climate Action Plan, already in full implementation, but also enables us to share our progress and results, and to learn from other internationally recognised destinations.

Undoubtedly, the Tourism Observatory must enable us to promote and achieve the highest possible levels of sustainability, bearing in mind that these goals will only be reached if we are able to increase economic prosperity for all citizens and stakeholders, reduce social inequalities, and ensure that all public authorities fully embrace their environmental responsibilities within their respective areas of competence.

The data and insights drawn from the 2023 Sustainability Report allowed us to address the various regulatory milestones undertaken to date—all with sustainability as the common thread in the redesign of the Canary Islands as a destination. For the Canary Islands' Ministry of Tourism and Employment, sharing the data contained in the 2024 Sustainability Report represents an exercise in transparency and dialogue with civil society, which will undoubtedly contribute knowledge to a key sector for our islands. This sector must face present and future challenges with the highest level of social consensus possible, and the active participation of the Universities of La Laguna and Las Palmas de Gran Canaria plays a decisive role in placing Canarian society at the heart of public action.

Jéssica de León Verdugo
Minister of Tourism and Employment
Government of the Canary Islands

Introduction

The year 2024 will be remembered in the Canary Islands as a record-breaking year in terms of tourist arrivals and expenditure, but also as a year marked by mass demonstrations that reflected the discontent of broad sectors of the population, placing tourism at the heart of public debate. One key question is whether these protests are against tourism itself, or rather in support of a model that avoids some of its most visible negative effects.

Much has been said about alternative tourism models, yet little has been done to give this concept a more concrete and actionable meaning. In any case, any change in the tourism model must consider the wishes and interests of the local population and reconcile them with those of our visitors and the organisations and businesses, both local and international, that enable the Canary Islands to maintain a strong position in the global market each year.

Like other sectors, but in a particularly distinct way due to its development in highly localised territories, tourism brings with it not only advantages but also potential costs for the society and natural environment in which it operates. Tourism is a cross-cutting activity, permeating the social fabric and natural surroundings, and if it reaches certain thresholds without proper management and regulation, it can produce negative impacts on segments of the local population.

It would be incorrect to claim that tourism is the main cause of the challenges facing the Canary Islands. A portion of the public's discontent with tourism stems from a lack of regulation and public investment. Moreover, certain market dynamics make it difficult to move towards a long-term project committed to social well-being and environmental conservation. Moreover, the issues associated with tourism are not solely tourism-related, they are also linked to weaknesses in the education system and labour market, a lack of entrepreneurial culture, housing problems, traffic, landscape and environmental degradation, and, ultimately, the structural economic underdevelopment of the Canary Islands. These are all multi-causal phenomena that, while not easily or quickly resolved, require short-term action to achieve medium- and long-term goals.

In the years ahead, the Canary Islands will face major challenges. The growing influence of technology platforms, the dependence on social media in shaping tourist behaviour and consumption, geopolitical tensions in Europe, and climate change are all factors that will affect the region and require increased attention. Placing residents' well-being at the centre could be key to addressing these challenges in a way that leaves no one behind.

This report aims to provide both a broad and detailed perspective on the 16 key areas of tourism development in the Canary Islands, using available data to contribute to a rational, informed and constructive debate on the major sustainability challenges facing tourism in the archipelago. In the coming years, this work aspires to grow through new information generated by both the public and private sectors, and through the development of a healthy debate on the role of tourism and its contribution to the sustainability of the islands.

Executive summary

In 2024, the Canary Islands received 17,767,833 tourists, reaching an aggregate tourist expenditure of 22.35 billion euros. This year marked a significant milestone in the improvement of tourism-related statistical information. The Canary Islands Institute of Statistics (ISTAC) conducted an extensive survey on residents' perceptions of tourism and published detailed data on holiday rental activity. Similarly, Promotur (Canary Islands´ Tourism) released a report on greenhouse gas emissions generated by the tourism sector. Meanwhile, the National Statistics Institute began offering highly detailed tourism data, particularly from mobile phone tracking and card payments, providing a much richer understanding of the diversity of tourism in the Canary Islands and enabling interesting comparisons with other regions.

One of the key highlights of the year has been the growing interest in the social perception of holiday rentals and their implications for residents' quality of life and access to housing. The debate intensified with the introduction of a bill in the Canary Islands Parliament during the first quarter of 2025 aimed at regulating this type of tourist accommodation. At the same time, large-scale social mobilisations have taken place, questioning the current tourism model and its impacts on the natural and socioeconomic environment.

The Canary Islands continue to hold a strong position in the main tourist source markets, particularly in the British market, reinforcing their image as a safe and high-quality destination. However, despite improving results, La Palma remains the only island that has not yet recovered its pre-pandemic and pre-volcanic crisis tourism levels and economic indicators.

The year 2024 also highlighted challenges in the environmental management of tourism. Although progress has been made in monitoring environmental impacts in natural areas and in water and waste management, there is still a lack of detailed information on key aspects. Reducing greenhouse gas emissions and promoting sustainable practices in the tourism sector remain priority areas.

On a social level, tourism training needs greater attention to ensure that the local workforce can access quality employment and actively participate in the tourism value chain. Furthermore, the sector must enhance innovation and digitalisation, fostering entrepreneurship and the development of new tourism products that help diversify the offer and reduce dependence on traditional models.

Critical issues such as tourism overcrowding, water and resource management, decarbonisation, and tourism governance remain unresolved challenges. Tourist areas are experiencing population growth that places pressure on public services and access to natural resources, demanding a comprehensive approach to ensure sustainability and residents' well-being.

Finally, the report emphasises the importance of maintaining the Canary Islands as an attractive and competitive destination, while also protecting its natural resources, ensuring visitor satisfaction and, above all, safeguarding the social well-being of its residents. Only a balance between economic development, environmental sustainability, and social cohesion will allow for the consolidation of a resilient tourism model capable of responding to current and future challenges.

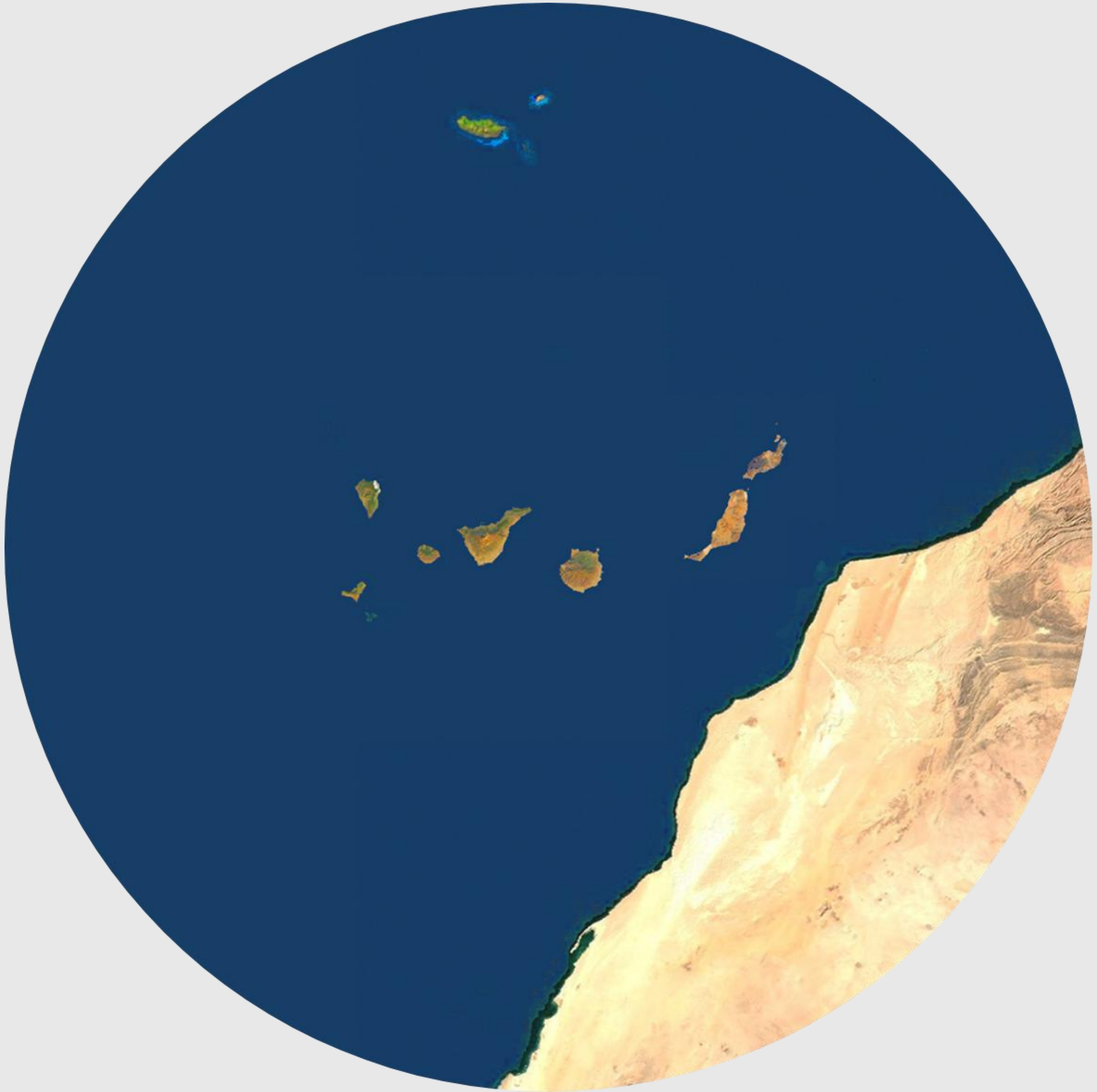
Tourism Observatory of the Canary Islands

Context of the Tourism Observatory of the Canary Islands

Structure of the Tourism Observatory of the Canary Islands

2.

Destination in brief



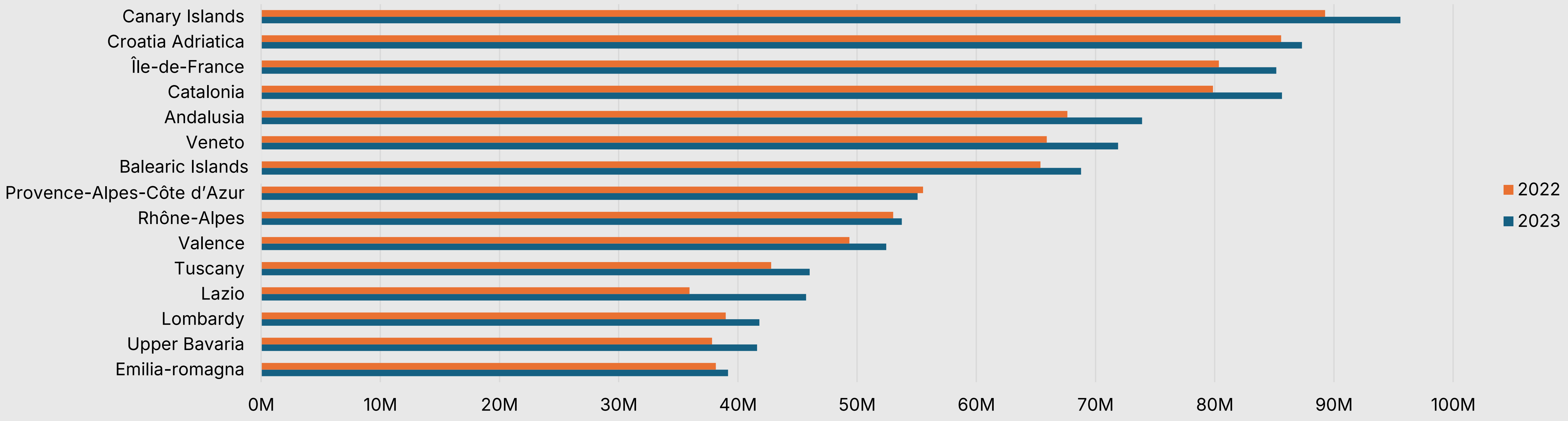
Tourism Economic Indicators 2019 and 2024

Indicators	2019	2024	Fountain
% Tourism GDP	33% (Spain: 12.4%)	36.8% (Spain: 12.3%) (in 2023)	IMPACTUR, Exceltur and the Government of the Canary Islands
Average expenditure			
Daily expenditure per tourist	€137.45	€176.87	Tourist Expenditure Survey (ISTAC)
Expenditure per tourist and trip	€1,122.58	€1,443.39	
Accommodation			
Hotels and apartments			
Available bed places	395,016	368,363	Tourist Accommodation Survey (ISTAC)
Overnight stays	97,964,361	100,227,490	
Room occupancy rate	77.4%	82.3%	
ADR / RevPAR	€85.17 / €65.96	€119.32 / €98.22	
Average stay (days)	7.45	7.09	
Short term rentals			
Available places	165,765	195,631	Tourist Accommodation Survey (ISTAC)
Average daily	€94.89	€142.65	
Overnight stays	14,940,000	22,297,000 (in 2023)	Experimental statistics (INE)
Tourist Arrivals			
International (value and % var. 19-24)	13,147,474	15,783,913 (+20.1%)	FRONTUR-Canarias (ISTAC)
Mainland Spain (value and % var. 19-24)	1,968,234	1,983,921 (+0.8%)	
Totals (value and % var. 19-24)	15,115,708	17,767,834 (+17.5%)	

The Canary Islands in the European context

The Canary Islands led Europe in tourist overnight stays in both 2022 and 2023, standing out for their low seasonality and ability to maintain high occupancy levels throughout the year. The archipelago recorded a 7% increase in overnight stays compared to the previous year, consolidating its post-pandemic recovery. This growth highlights its strength in comparison to other European destinations such as the Adriatic Coast of Croatia or Île-de-France (Paris). However, this leadership brings challenges in terms of sustainability and territorial management. It is essential to diversify the tourism offer, aiming for lower environmental impact and greater added value that benefits local society as a whole.

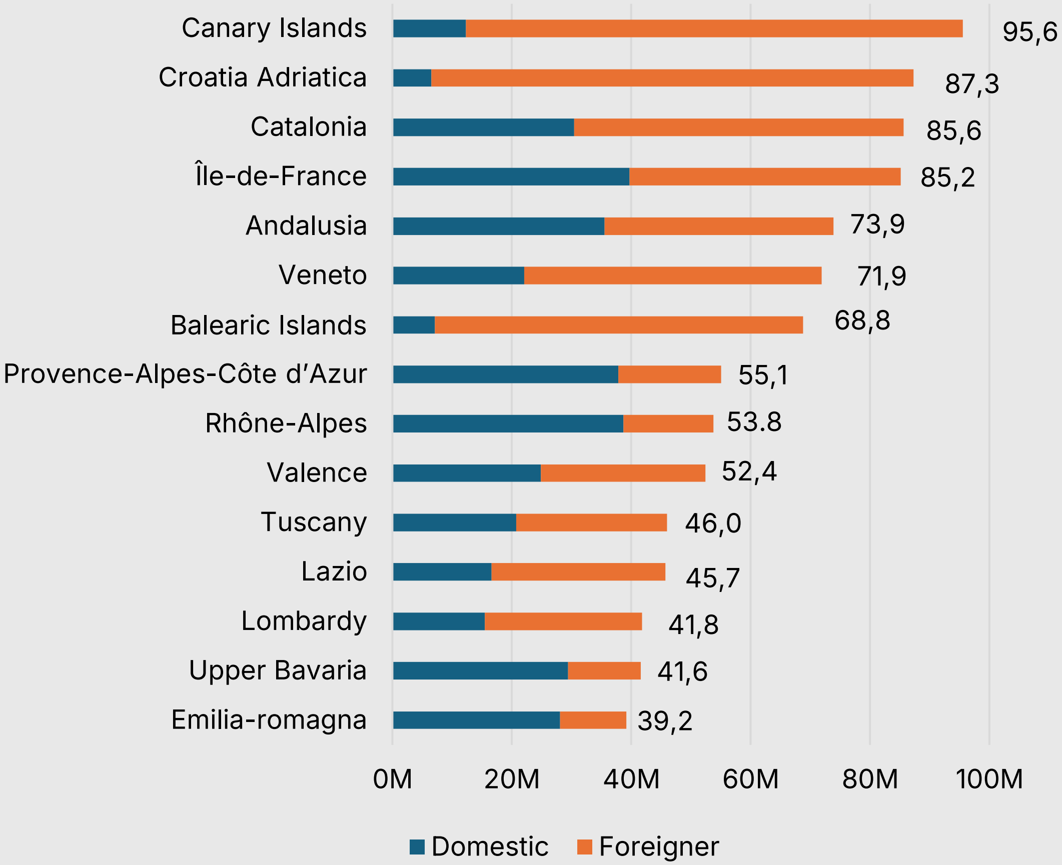
Overnight stays by tourists in the main regions (NUTS 2) of Europe



Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

In 2023, the most recent year for which harmonised data is available for European regions, the Canary Islands maintained their leading position among Europe's NUTS2 regions. This leadership is largely due to the strong weight of international tourism, which accounts for the majority of overnight stays in the archipelago. Unlike other European regions that rely more heavily on domestic tourism, the Canary Islands stand out for their ability to attract international visitors year-round.

Millions of overnight stays by tourists in 2023 by type of tourism in the main regions (NUTS 2) of Europe

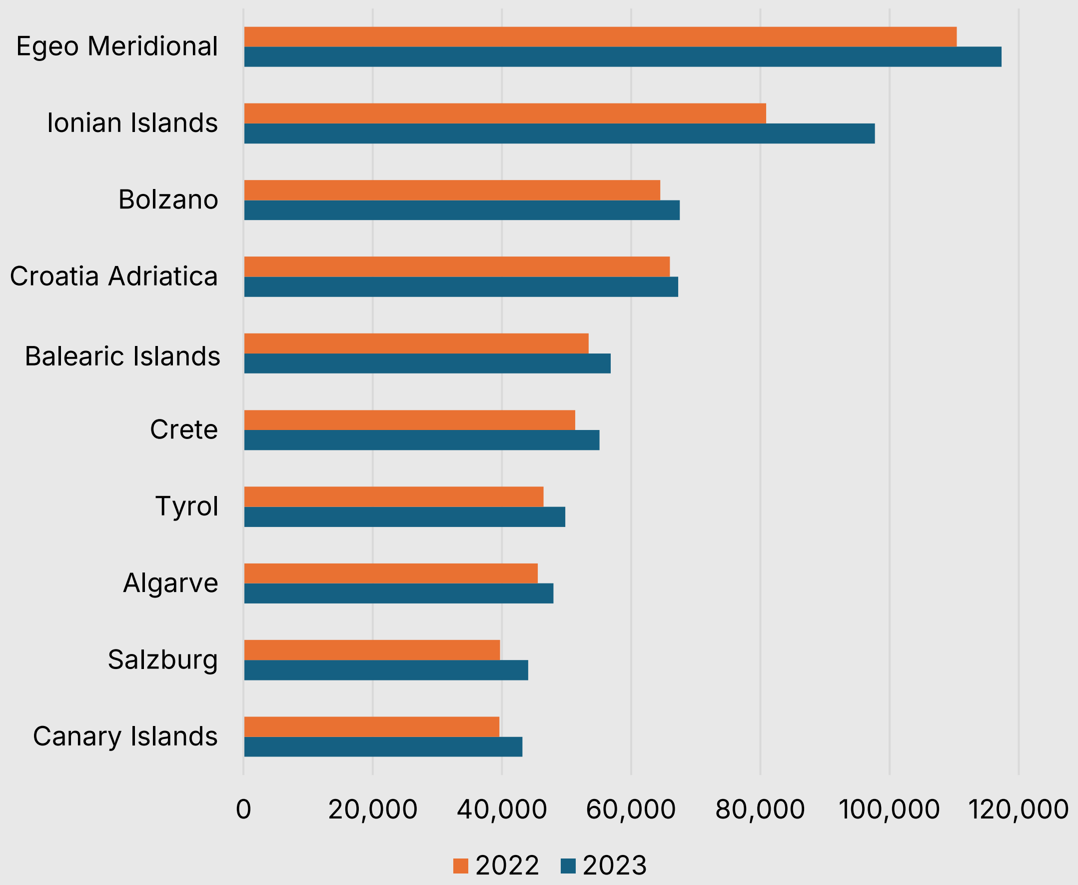


Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

When analysing the number of tourist overnight stays per 1,000 inhabitants across European NUTS 2 regions, the Canary Islands rank tenth, with approximately 40,000 overnight stays per 1,000 residents in both 2022 and 2023. This contrast shows that although the Canary Islands lead in absolute overnight stays, their relative weight in relation to population is lower than in other destinations with smaller populations.

From this perspective, the Southern Aegean region ranks first, with 117,000 overnight stays per 1,000 inhabitants in 2023, followed by the Ionian Islands and Bolzano. The relationship between tourism figures and resident population is key in assessing tourism sustainability. While the Canary Islands lead in total figures, they show a lower level of tourist saturation when measured per inhabitant, though they still face management challenges related to carrying capacity and the territorial distribution of tourist flows.

NUTS 2 regions with the highest number of overnight stays per 1,000 inhabitants in 2022 and 2023



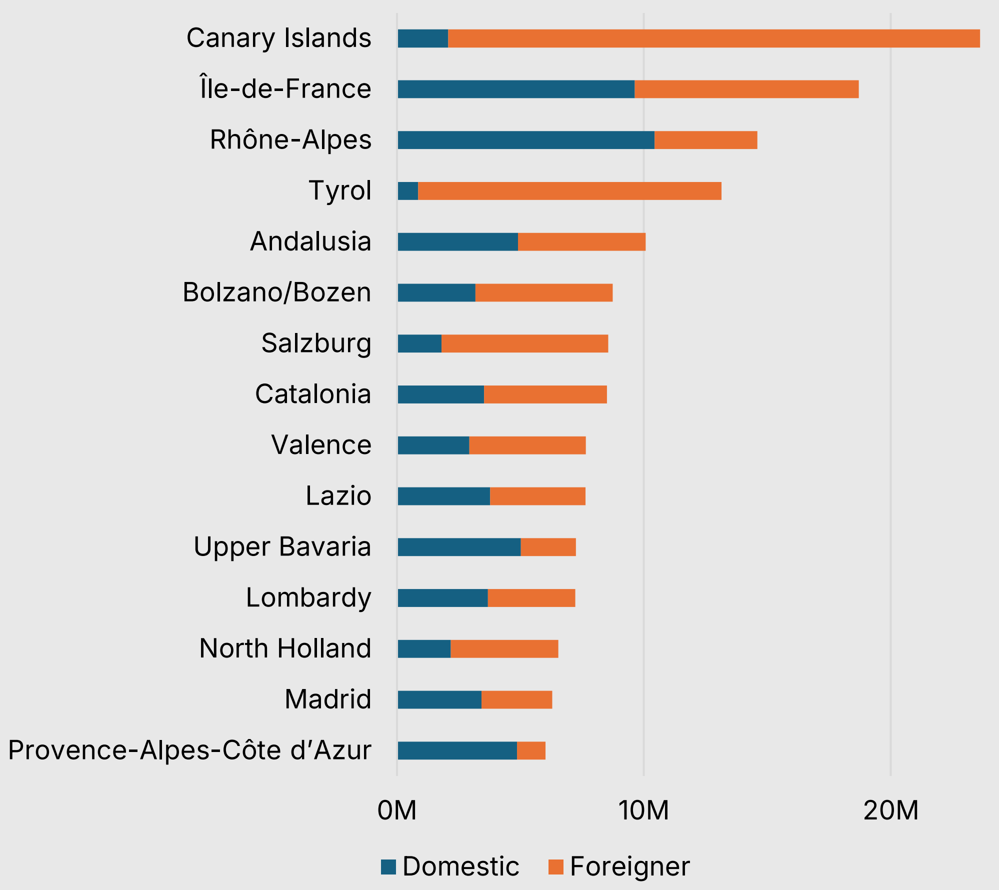
Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

The Canary Islands have firmly established themselves as the undisputed leader in tourist overnight stays during the winter among Europe's main regions, as seen in the winter of 2022/2023, with 23.6 million overnight stays. This figure is particularly noteworthy given the archipelago's status as a coastal destination. Its privileged position is largely due to its mild winter climate, which makes it a strategic alternative to more seasonal European destinations or those focused on snow tourism.

The predominance of international tourism is a key factor in this leadership, with foreign visitors accounting for the majority of overnight stays in the archipelago. This international appeal places the Canary Islands ahead of iconic destinations such as the Île-de-France (18.7 million) or the Alpine region of the Rhône-Alpes (14.6 million), which, despite receiving high tourist volumes, do not match the winter demand experienced in the Canary Islands.

Among coastal destinations, the Canary Islands clearly dominate, doubling or tripling the figures of similar regions such as Andalusia (10.1 million) or the Valencian Community (7.7 million). This leadership reinforces the archipelago's position as a winter refuge for European tourism.

Overnight stays of tourists in the winter 22/23 according to type of tourism in the main regions (NUTS 2) of Europe



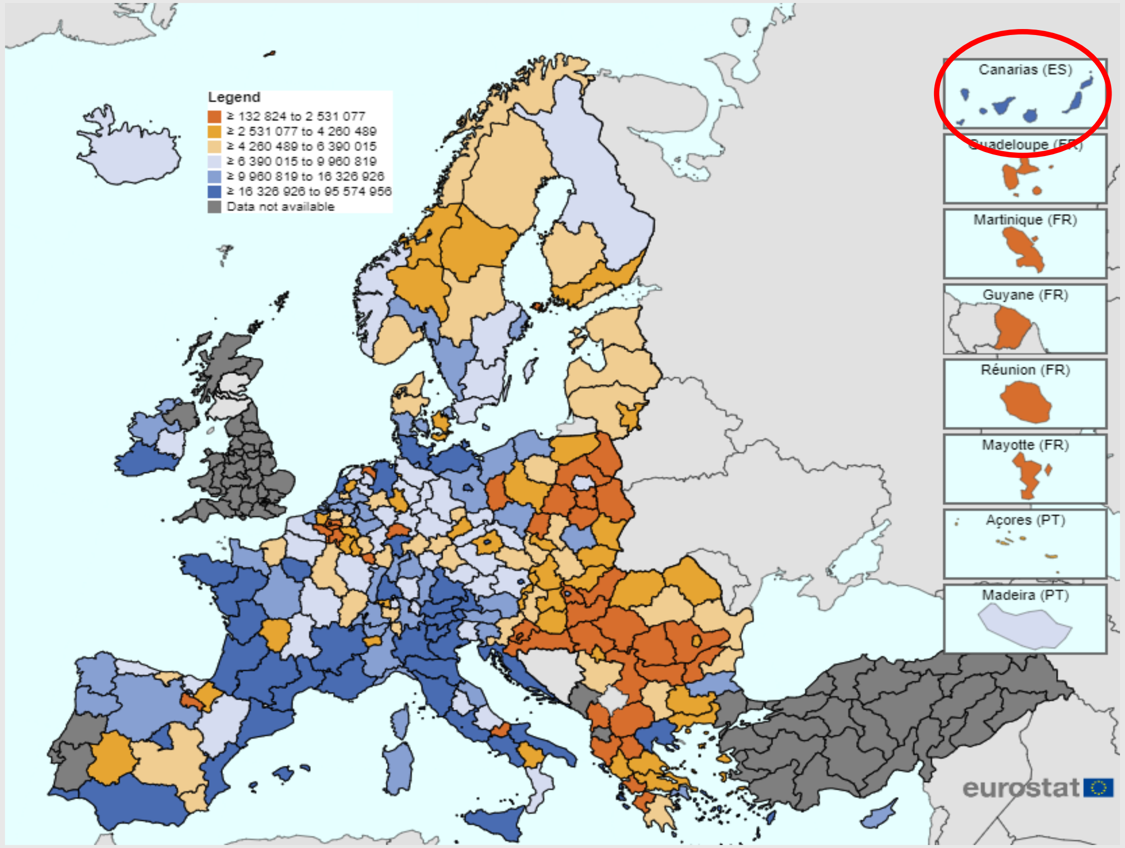
Note: Winter 22/23 is defined from Dec. 2022 to Feb. 2023
Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

The map below shows the distribution of overnight stays in tourist accommodation establishments across the various NUTS 2 regions of Europe, revealing a clear concentration of activity in key destinations, particularly in Spain, France and Italy.

In this context, the Canary Islands stand out as the region with the highest number of overnight stays, falling within the top range on the scale and being the only outermost region to achieve this status, well above other territories with the same classification.

This privileged position reaffirms the Canary Islands' leadership as one of Europe's top tourist destinations, attracting a high volume of visitors, especially during the winter months, when it becomes a preferred alternative to colder European destinations.

Overnight stays in 2023 in tourist accommodation establishments by region NUTS 2

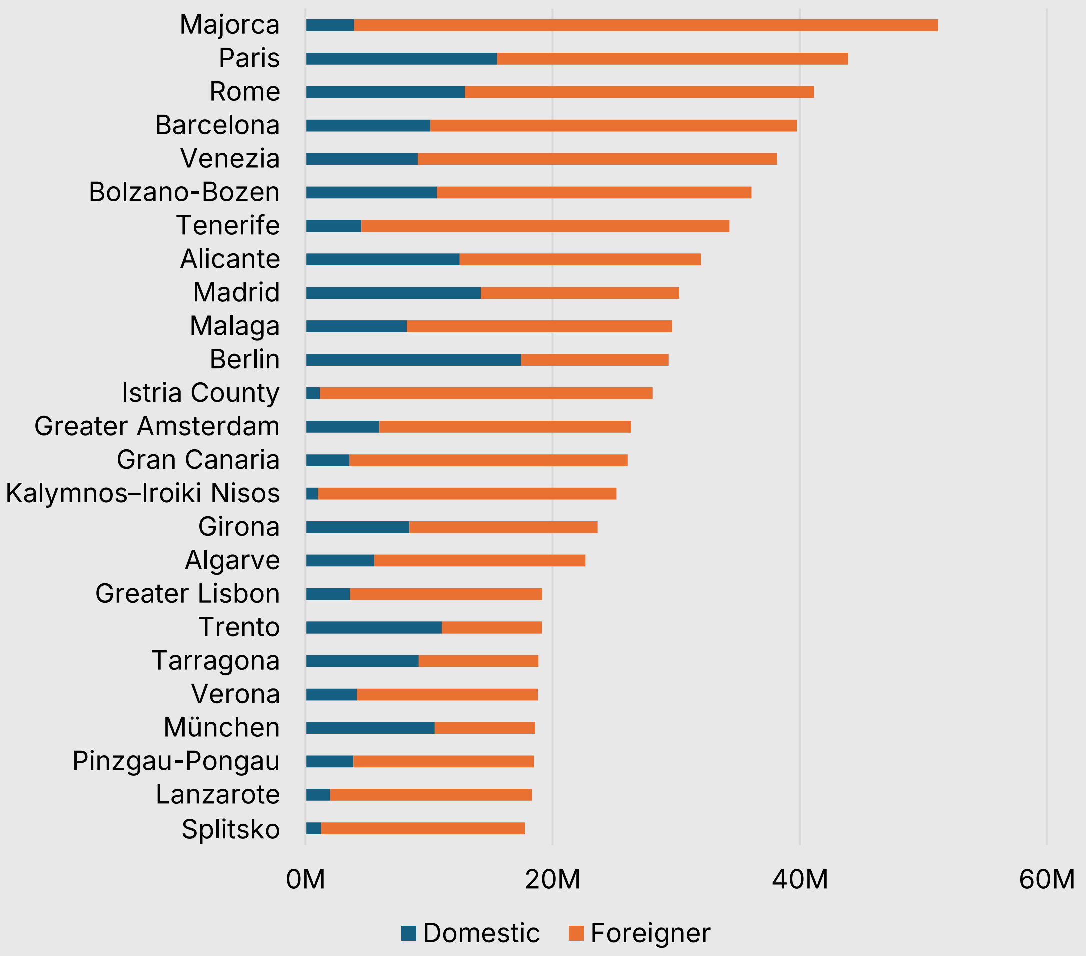


Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

At the NUTS 3 level in the European classification of subnational entities, which, in Spain, corresponds to mainland provinces and each of the islands, the individual significance of the main tourist destinations becomes clear. On this scale, Tenerife ranks seventh among European regions with the highest number of annual overnight stays in tourist accommodation. Gran Canaria holds the fourteenth position among NUTS 3 regions, highlighting its strength as a destination within the national market.

This analysis underscores the competitiveness of the Canary Islands compared to well-established urban and coastal destinations, placing them on par with major European tourism hubs such as Paris, Rome or Barcelona. It also highlights the specific weight of each island in shaping the European tourism landscape.

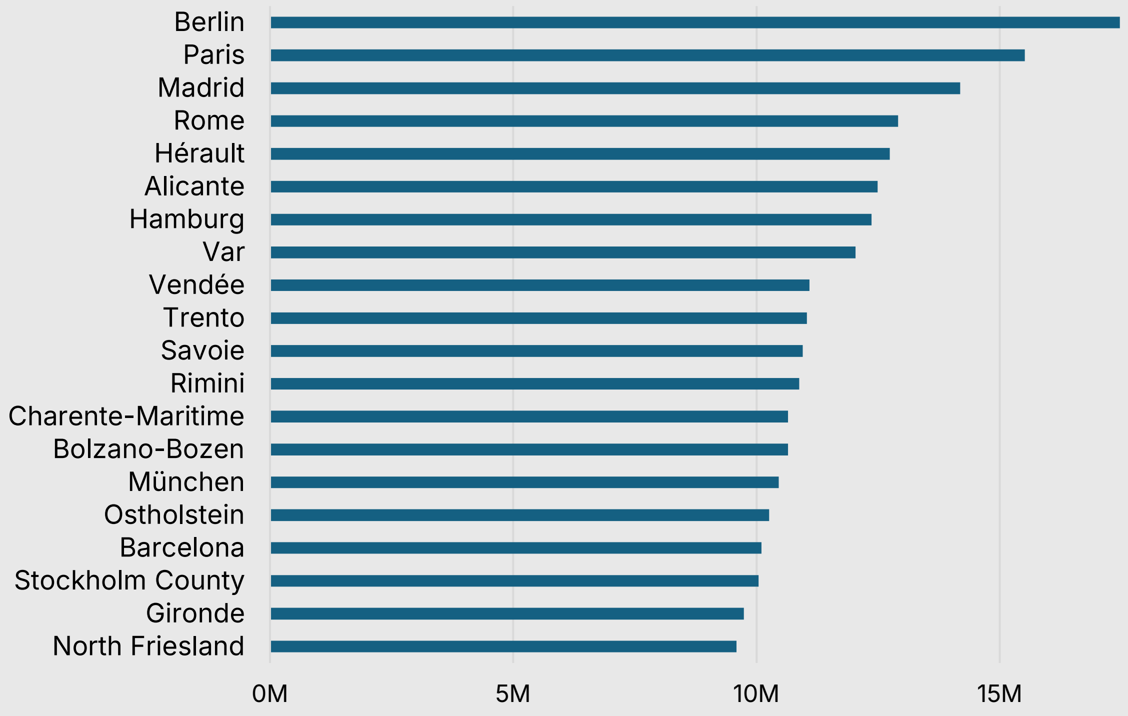
Annual overnight stays in tourist accommodation by type of tourism in the main NUTS 3 regions in 2023



Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

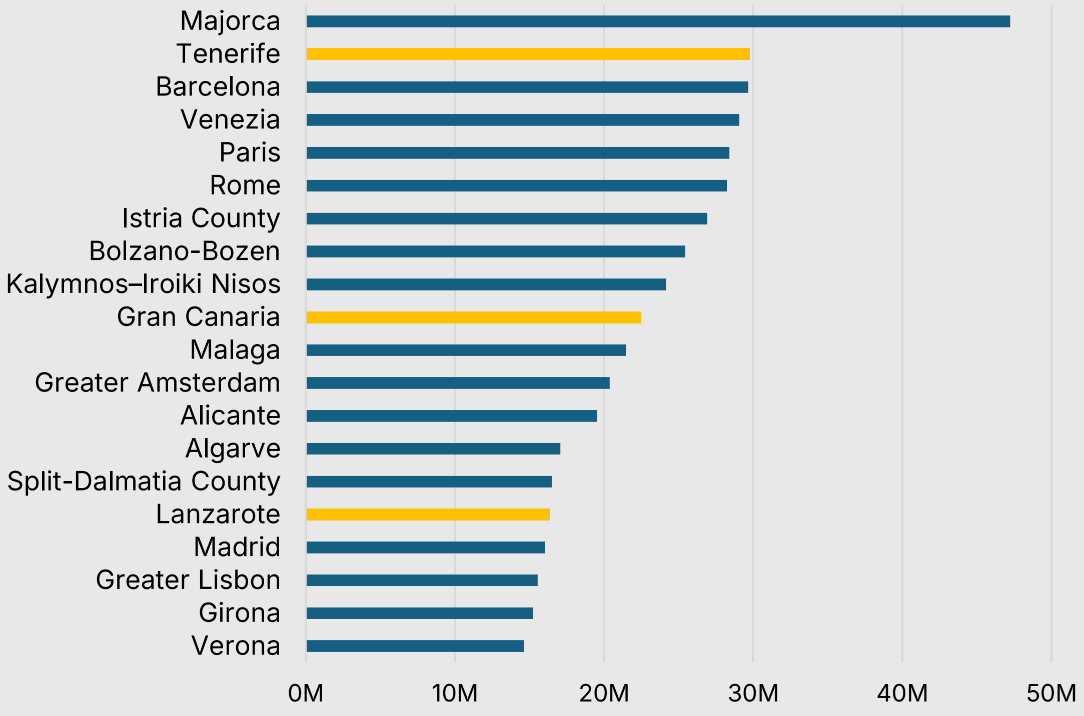
The analysis of domestic and international overnight stays in 2023 highlights the strong international orientation of the Canary Islands among NUTS 3 regions. Tenerife ranks second in international tourism, behind Mallorca, with nearly 30 million overnight stays, while Gran Canaria holds the tenth position with 22 million. Lanzarote also features among the top international destinations with around 12 million stays. In contrast, the islands show limited presence in domestic tourism, similar to Mallorca. Cities such as Berlin, Paris and Madrid dominate in terms of domestic tourism.

Annual overnight stays of domestic tourism (domestic residents) in the main NUTS 3 regions in 2023



Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

Annual overnight stays of foreign tourism in the NUTS 3 regions in 2023



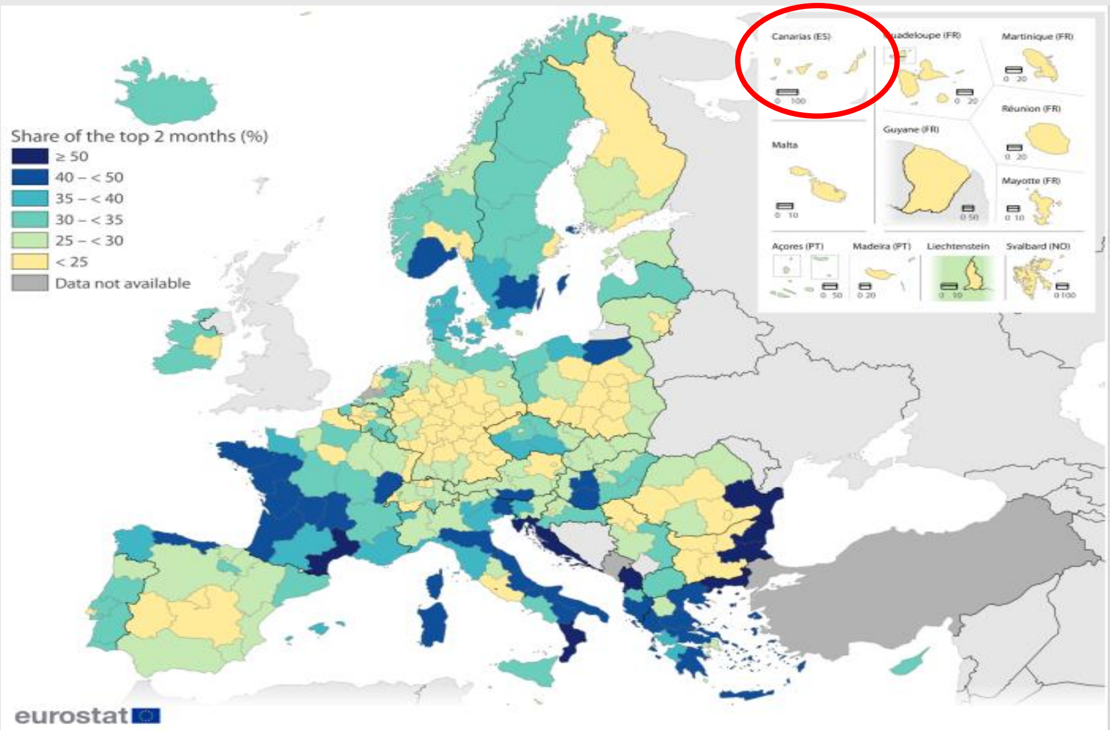
Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

The map illustrates regional differences in tourism seasonality across Europe in 2023, measured by the proportion of overnight stays concentrated in the two peak-demand months. The Canary Islands stand out for their low seasonality, falling into the category of less than 25%, indicating an even distribution of tourism activity throughout the year. Notably, most of the regions marked in yellow, such as the Canary Islands, are either low-tourism areas or urban destinations.

The situation in the Canary Islands contrasts with that of Mediterranean regions, which show high concentration in the summer months (such as Greece, southern Italy or the Spanish coast). The archipelago maintains stable demand thanks to its mild climate and year-round appeal as a tourist destination. This low seasonality provides the Canary Islands with a competitive advantage over other European destinations, ensuring stable tourism employment, greater profitability for the sector, and reduced pressure on natural resources during specific periods.

In a context where sustainability is key, the non-seasonal nature of tourism in the Canary Islands contributes to mitigating issues related to overcrowding and the negative impacts typically associated with demand peaks in sun-and-beach destinations.

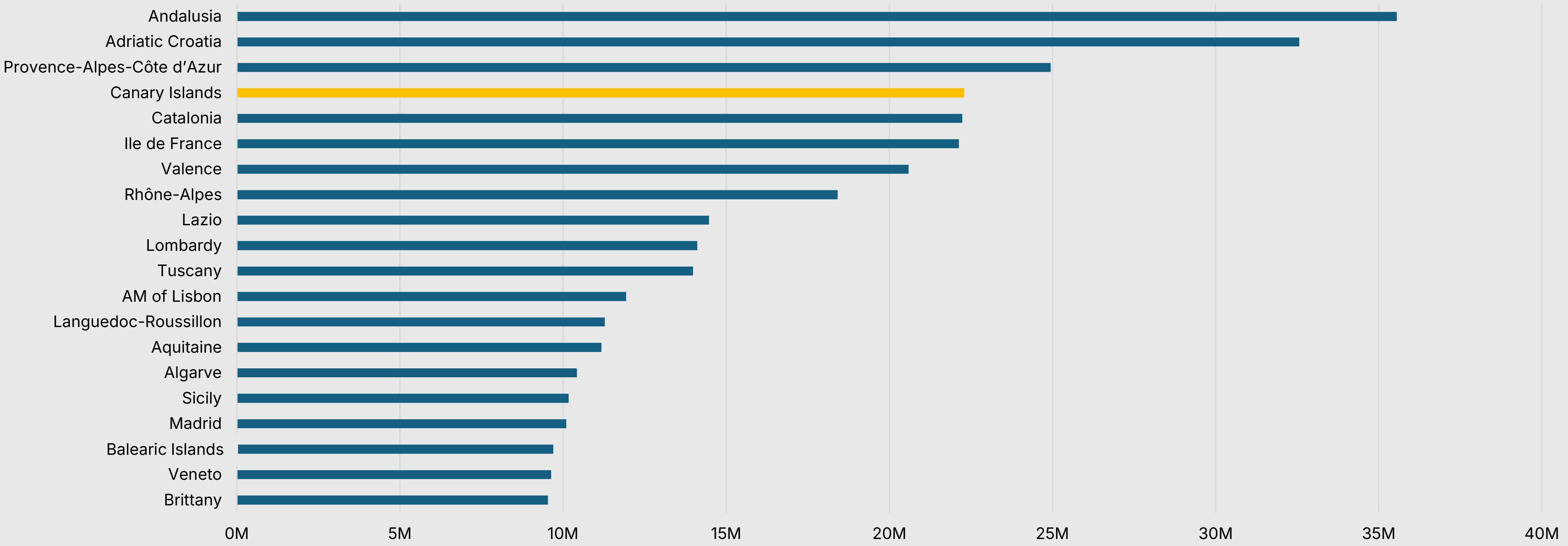
Seasonality in the European Union by NUTS 2 regions: share of the two months with the most overnight stays in total annual overnight stays in 2023



Source: Occupancy of Tourist Accommodation Establishments (Eurostat)

The figures in the previous charts did not include the phenomenon of holiday rentals. In this regard, the Canary Islands rank as the fourth region with the highest number of annual overnight stays in short-term accommodation offered through online platforms, according to statistics published by the European Union itself.

Annual overnight stays in short term rentals offered via online platforms in the main regions (NUTS 2) of Europe in 2023



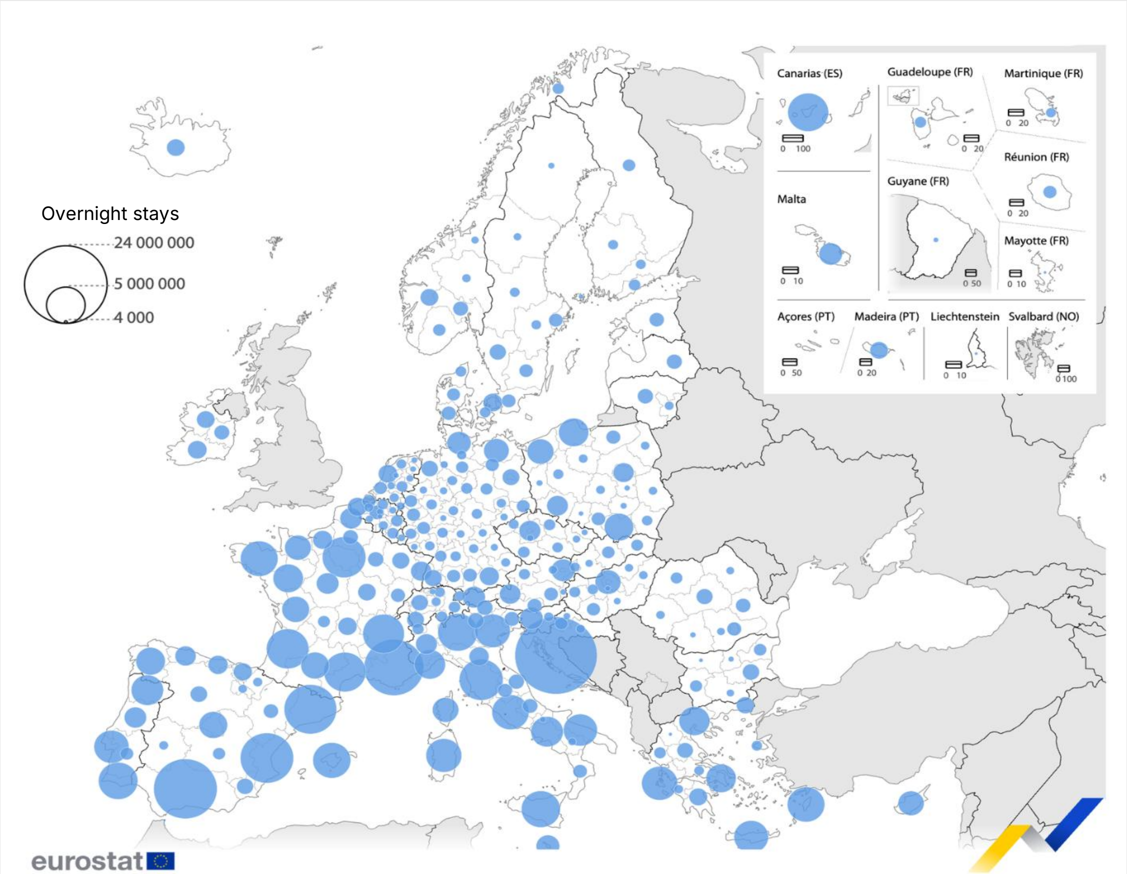
Source: Accommodation offered through online platforms (Eurostat experimental statistics)

The map illustrates the scale of short-term holiday rental use in Europe between April and June 2023, revealing the growing importance of this type of accommodation in the continent's tourism market. Major tourist areas, particularly coastal regions and large cities, concentrate a significant volume of overnight stays in holiday rentals, with destinations such as Paris, Barcelona, Rome, and various parts of the Mediterranean coastline standing out.

The Canary Islands are prominent in this context, registering a notable volume of overnight stays in short-term rentals, comparable to some of Europe's main tourism hotspots. This highlights the importance of holiday rentals within the archipelago's tourism sector.

The rise of holiday rentals in the Canary Islands presents economic opportunities by boosting local income and diversifying the tourism offer, but it also raises challenges related to housing market pressure, the sustainability of the tourism model, and coexistence with residents. Across Europe, the growth of holiday rentals has sparked similar debates, prompting the search for regulatory models that promote more sustainable tourism aligned with local needs. In island regions like the Canary Islands, with fragile ecosystems and high tourism density, this challenge becomes even more pressing.

Overnight stays in short term rentals in Europe between April and June 2023



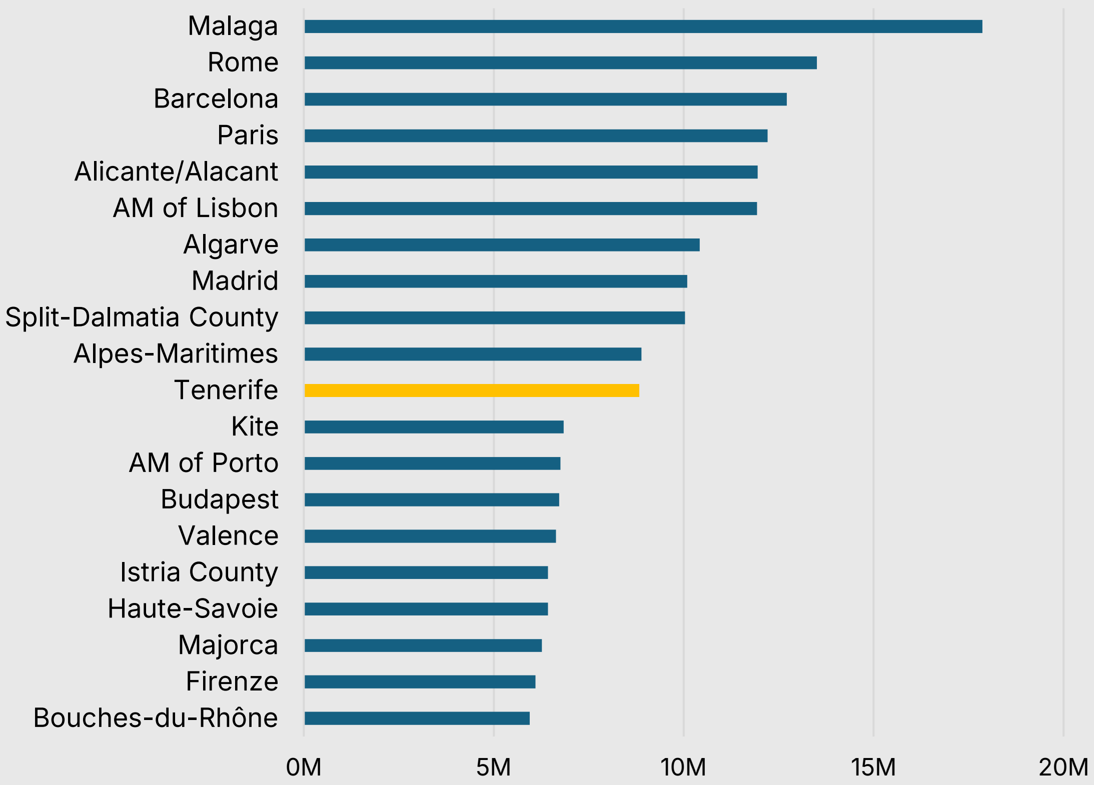
Source: Accommodation offered through online platforms (Eurostat experimental statistics)

The chart shows annual overnight stays in short-term accommodation offered through online platforms in 2023, based on NUTS 3 regions in Europe. In Spain, NUTS 3 regions correspond to mainland provinces and each individual island.

In this ranking, Málaga leads by a wide margin, consolidating its position as the top European destination in the holiday rental market managed via online platforms. It is followed by major cities and metropolitan areas such as Rome, Barcelona and Paris, which combine strong tourist appeal with a large supply of short-term rentals.

In the case of the Canary Islands, Tenerife stands out, ranking 11th overall. This reflects the significant presence of holiday rentals on the island, although with figures below those of the main urban and Mediterranean coastal tourism hubs.

Annual overnight stays in short term rentals offered via online platforms in the main NUTS 3 regions of Europe in 2023

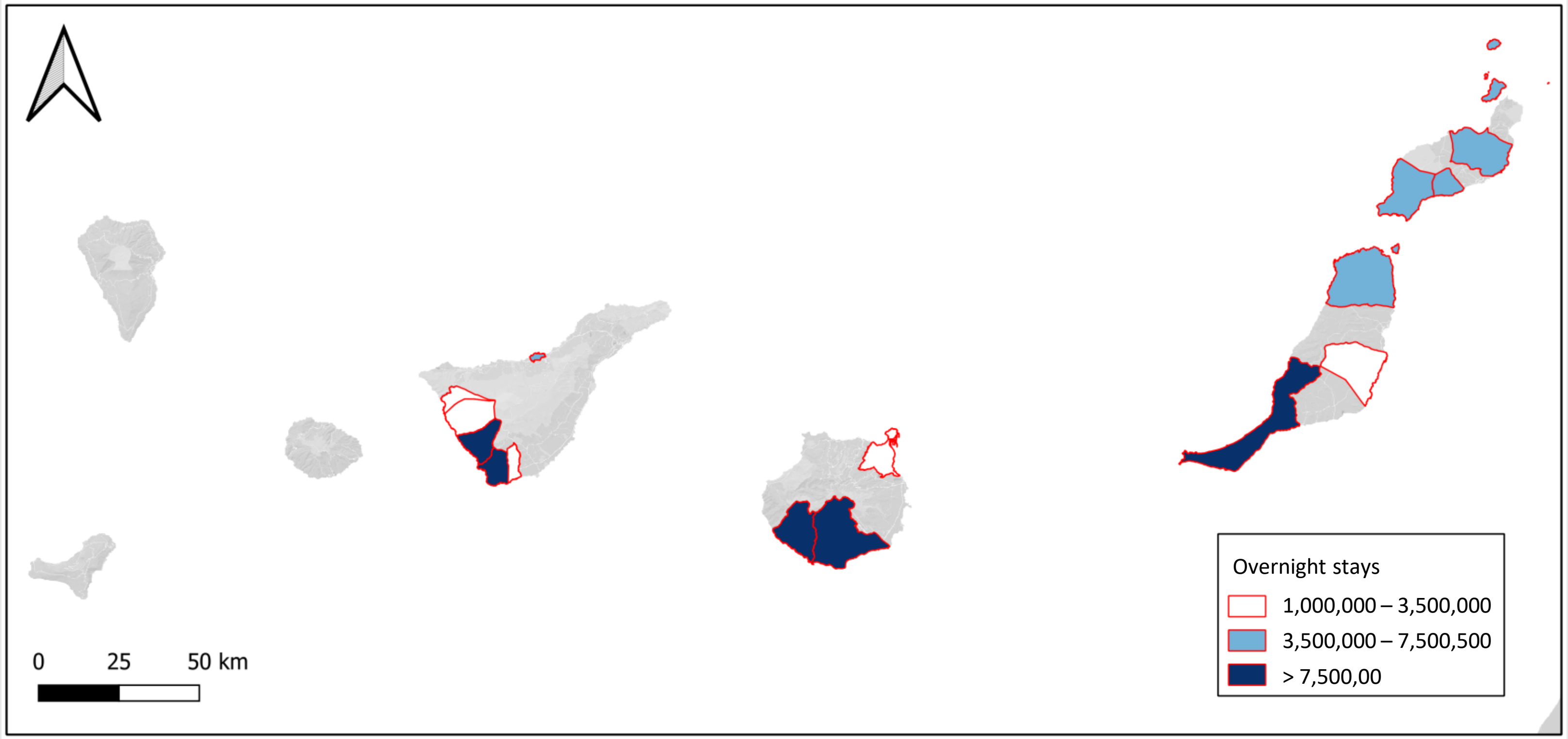


Note: M is millions. Source: Accommodation offered through online platforms (Eurostat experimental statistics)

Concentration of tourism activity

The map reflects the high concentration of tourism activity in the Canary Islands, where just fifteen of the archipelago's eighty-eight municipalities account for 95.5% of hotel and apartment overnight stays in 2024. The most prominent areas are located in the south of Tenerife and Gran Canaria, as well as in the main tourist hubs of Lanzarote and Fuerteventura. This high concentration highlights the tourism specialisation of certain municipalities, generating significant local economic benefits, but also presenting challenges in terms of sustainability, pressure on resources, and territorial management. Territorial diversification of tourism remains a key challenge for achieving a more balanced development across the archipelago.

Municipalities that concentrate most of the overnight stays in hotels and apartments in the Canary Islands in 2024



Source: Tourist Accommodation Survey (ISTAC)

3.

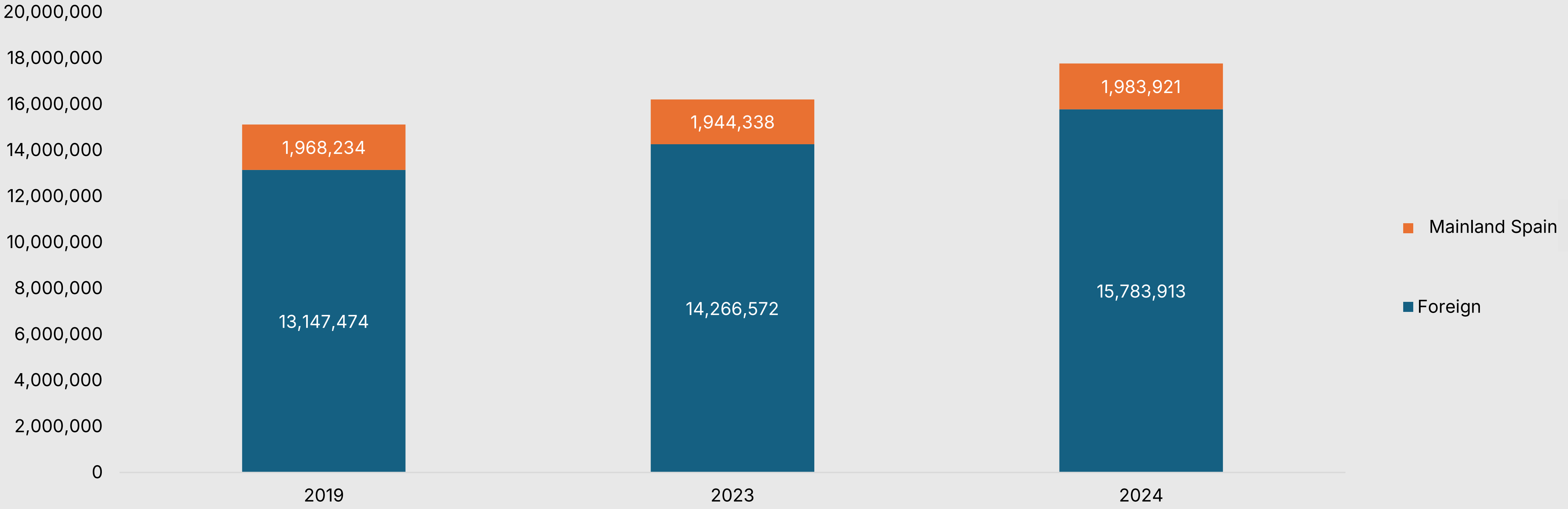
Tourism situation 2024

Evolution of tourist arrivals

The number of tourists visiting the Canary Islands in 2024 increased compared to previous years. International tourist arrivals grew by 20.1% between 2019 and 2024, while arrivals from mainland Spain rose by 0.8%.

Overall, the total number of visitors to the archipelago has increased by 17.6% over the past five years.

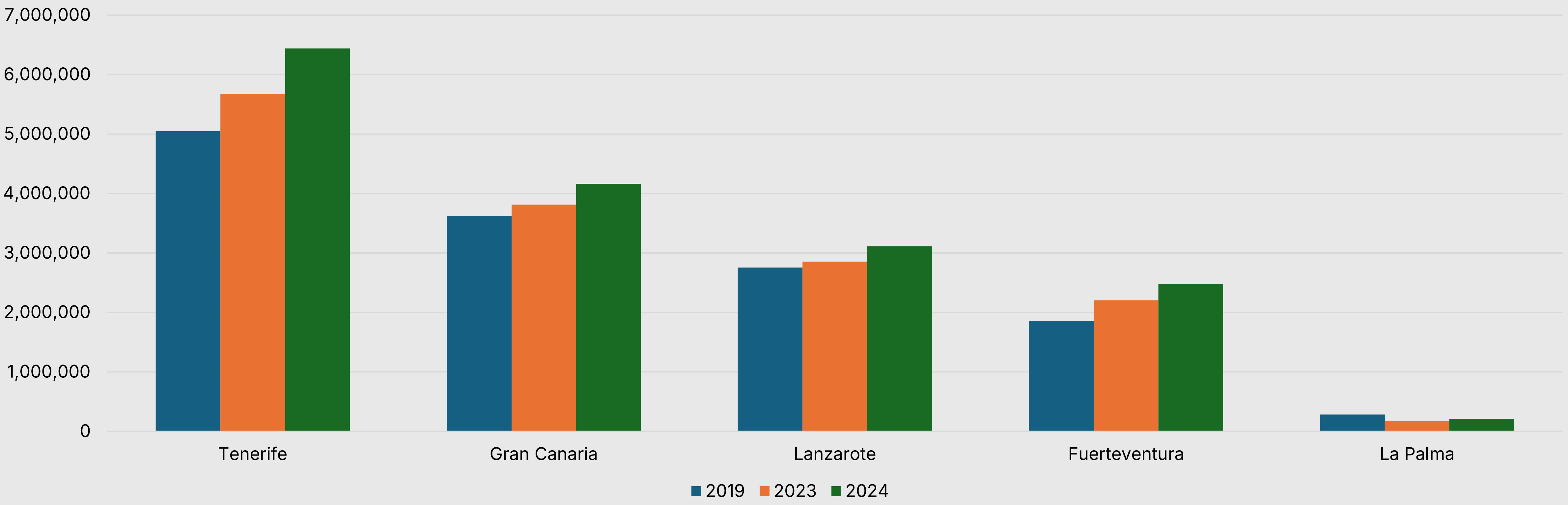
Annual arrival of tourists (mainland Spain and foreign) to the Canary Islands



Source: FRONTUR-Canarias (ISTAC)

Tourist arrivals, both international and from mainland Spain, increased across most of the islands in 2024 compared to pre-pandemic levels (2019). Fuerteventura led the growth with a 31.5% increase, followed by Tenerife (25.4%), Lanzarote (11.1%) and Gran Canaria (10.4%). In contrast, La Palma experienced a 26.9% decline, a trend linked to the medium-term effects of the volcanic eruption.

Arrival of tourists (mainland Spain and foreign) by islands

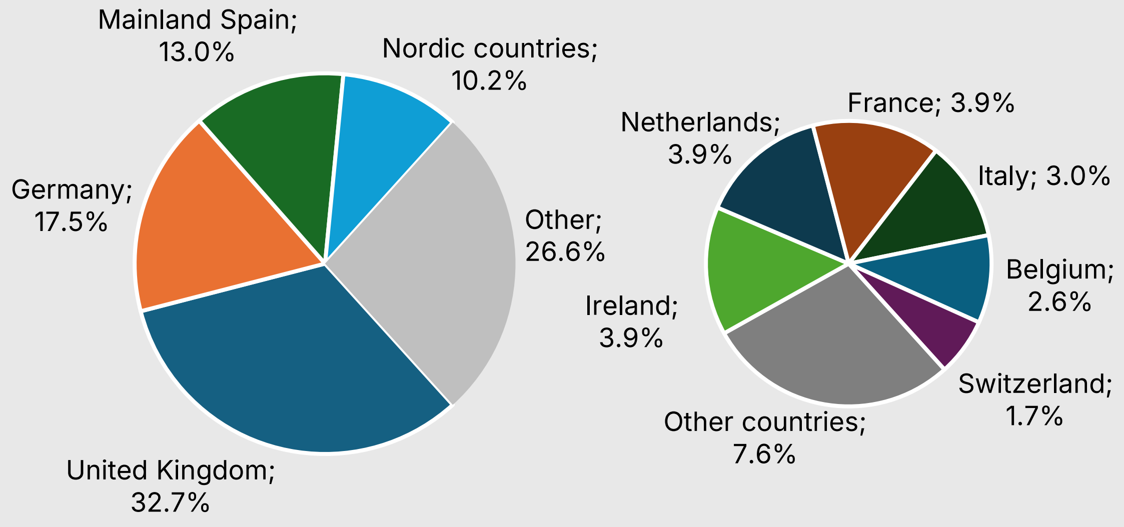


Source: FRONTUR-Canarias (ISTAC)

The percentage distribution of tourist arrivals to the Canary Islands by nationality in 2024 shows a similar profile to that of 2019, prior to the pandemic. The United Kingdom, Germany and mainland Spain remain the archipelago's main source markets. However, some variations are observed, including an increase in the share of British tourists, a decline in the share of tourists from mainland Spain and the Nordic countries, and growth in the percentage of tourists from Ireland, France and Italy.

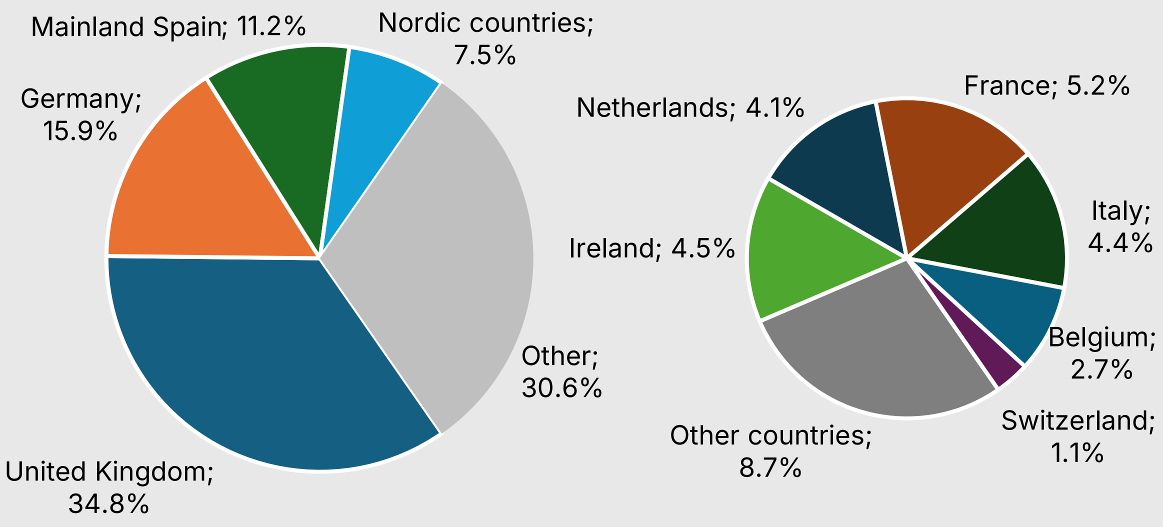
Distribution (%) of tourist arrivals in the Canary Islands by country of origin

2019



Source: FRONTUR-Canarias (ISTAC)

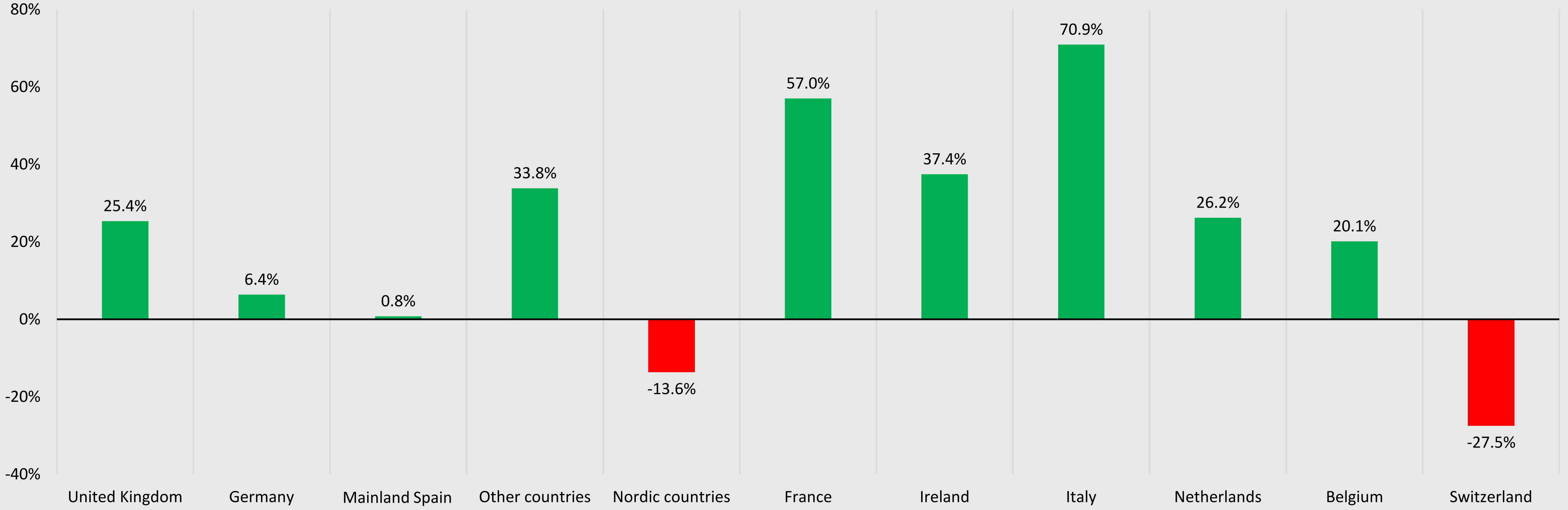
2024



Source: FRONTUR-Canarias (ISTAC)

The evolution of tourist arrivals to the Canary Islands between 2019 and 2024 shows a general increase across most source markets. Notable growth is seen in markets such as Italy (70.9%), France (57.0%) and Ireland (37.4%). In contrast, the Nordic countries and Switzerland have experienced a decline in arrivals over this period.

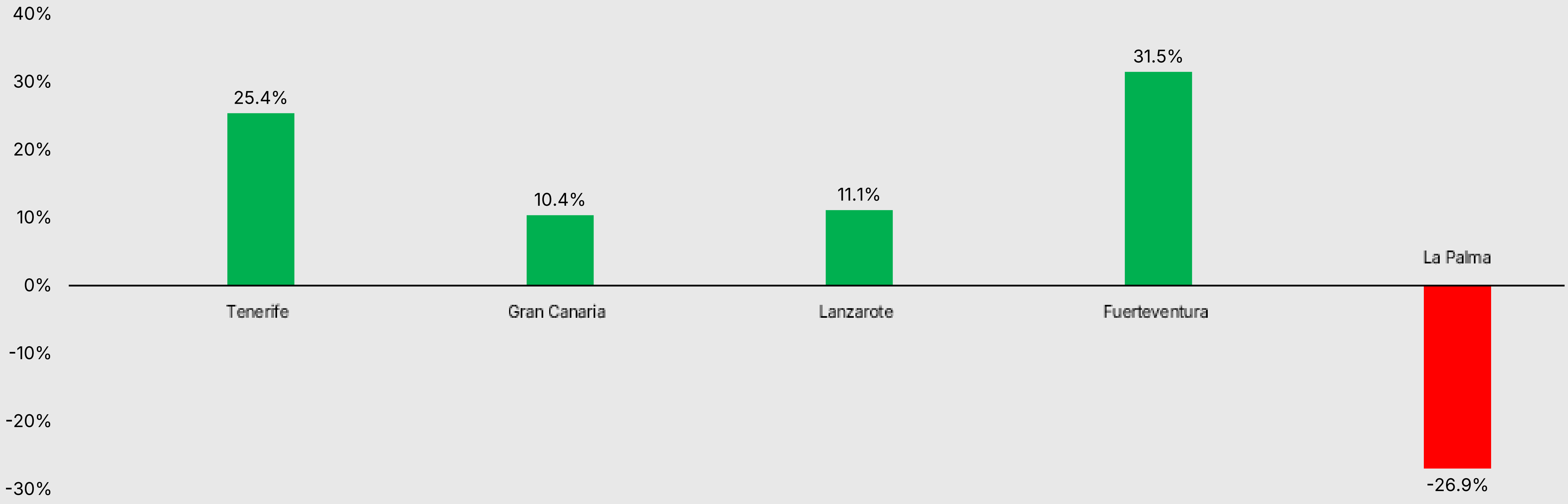
Variation (%) of tourist arrivals in the Canary Islands (2024 compared to 2019)



Source: FRONTUR-Canarias (ISTAC)

The evolution of tourist arrivals from mainland Spain and abroad between 2019 and 2024 shows significant differences across the islands. Fuerteventura leads with a 31.5% increase, followed by Tenerife (25.4%), Lanzarote (11.1%) and Gran Canaria (10.4%). In contrast, La Palma experienced a 26.9% decline.

Change (%) in the arrival of mainland Spain and foreign tourists (2024 compared to 2019)

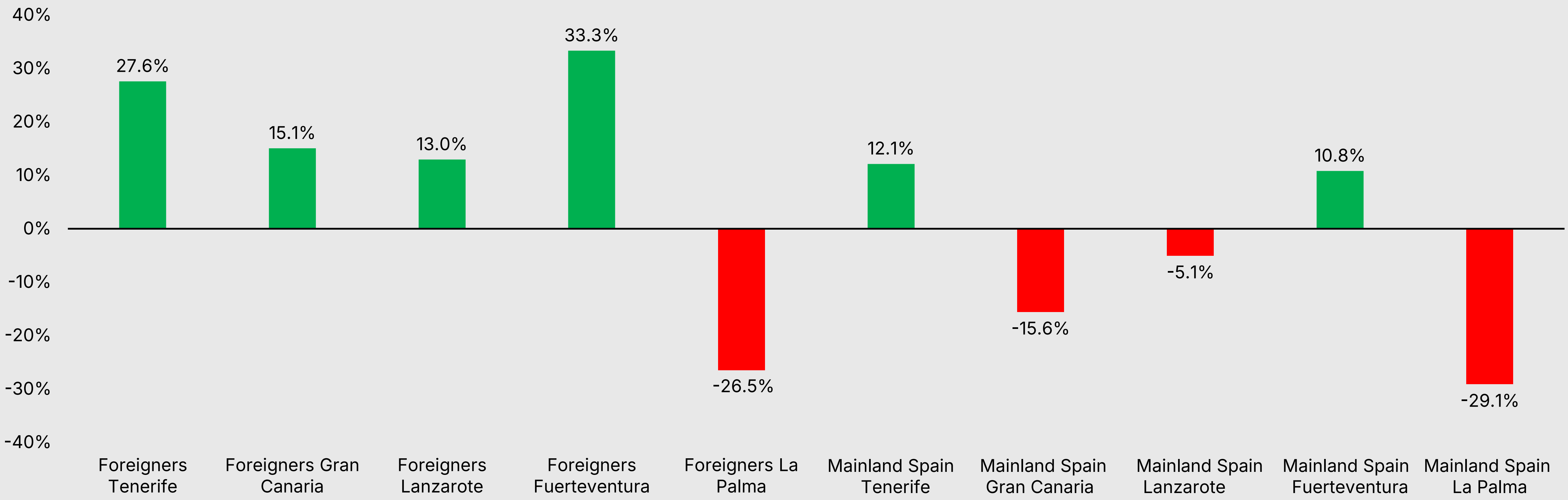


Source: FRONTUR-Canarias (ISTAC)

When distinguishing between mainland Spain and international tourists, the percentage variation in arrivals by island reveals notable patterns when comparing 2024 to 2019. International tourist arrivals increased mainly in Fuerteventura (33.3%), Tenerife (27.6%) and Gran Canaria (15.1%), while La Palma recorded a decline of 26.5%.

Regarding mainland Spain tourism, growth was observed in Tenerife (12.1%) and Fuerteventura (10.8%). However, arrivals from mainland Spain decreased in the other islands, particularly in La Palma (29.1%), followed by Gran Canaria (15.6%) and Lanzarote (5.1%).

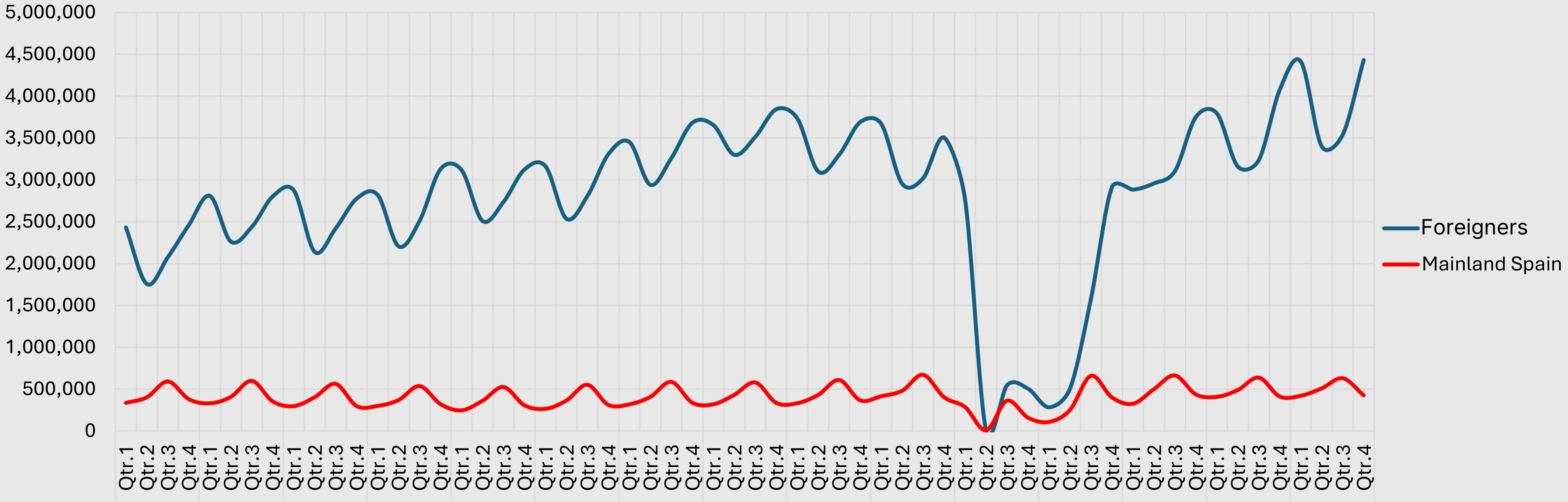
Change (%) in tourist arrivals (2024 compared to 2019)



Source: FRONTUR-Canarias (ISTAC)

According to data from FRONTUR-Canarias (ISTAC), the quarterly flow of international tourists to the Canary Islands has shown a sustained recovery following the sharp drop in 2020 caused by the pandemic and mobility restrictions. This growth peaked in the fourth quarter of 2024, with nearly 4.5 million arrivals, setting a new historical record. In contrast, tourism from mainland Spain has remained more stable over the analysed period, without surpassing the peak reached in the third quarter of 2019.

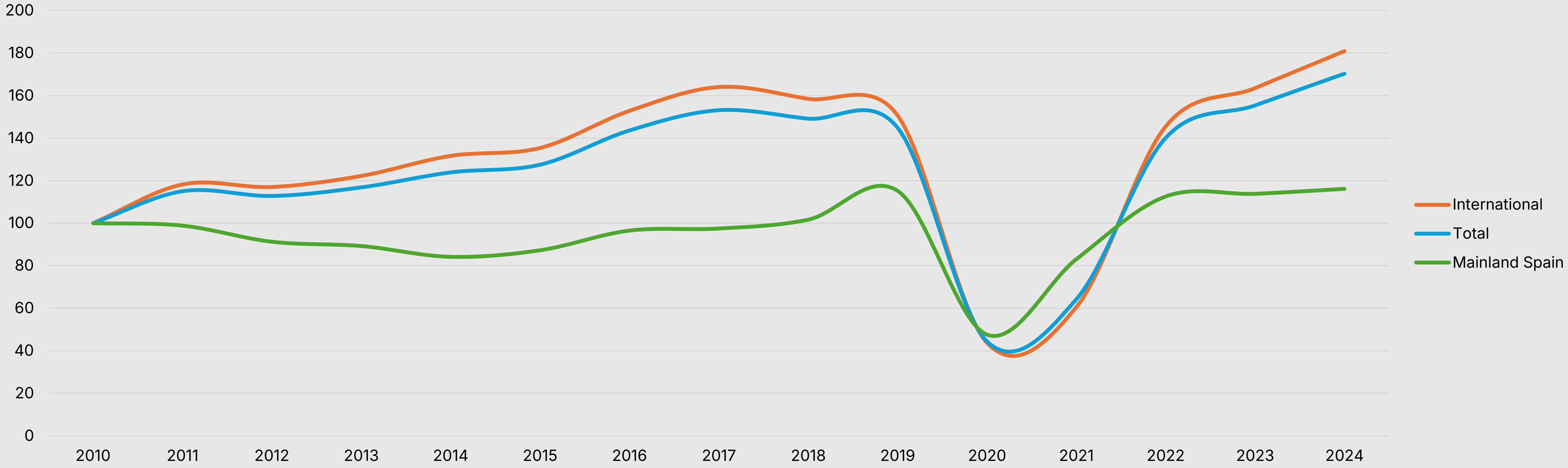
Tourist arrivals in the Canary Islands by quarter



Source: FRONTUR-Canarias (ISTAC)

When analysing the evolution of tourist arrivals based on an index set at 100 in 2010, excluding the distortions caused by the pandemic, a sustained increase is observed in the inflow of international tourists. In contrast, arrivals from mainland Spain remained below 2010 levels until 2018, when a recovery began, later interrupted by the health crisis. Since 2022, tourism trends have returned to pre-pandemic levels, resuming their trajectory. Cumulatively, mainland Spain tourism has grown by around 16% compared to 2010, while international tourism has increased by nearly 80%.

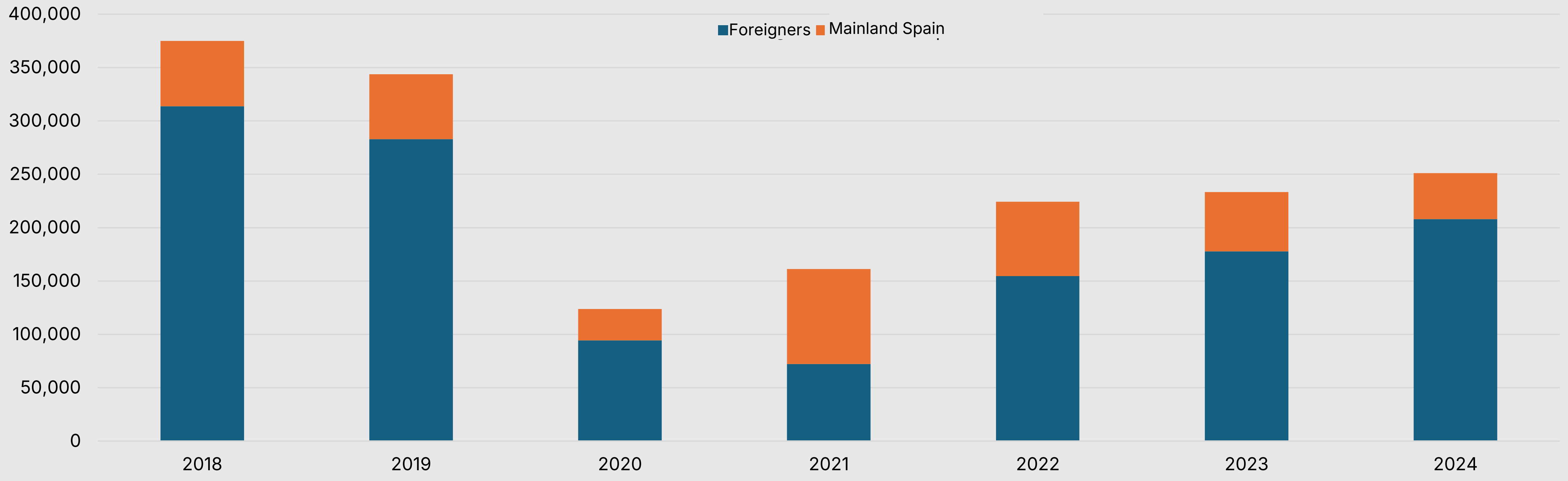
Evolution of tourist arrivals in the Canary Islands, index 100 in 2010



Source: FRONTUR-Canarias (ISTAC)

La Palma has suffered a double impact, first from the pandemic in 2020 and then from the volcanic eruption in 2021. Tourist arrivals remain well below pre-pandemic levels. Notably, in 2021 and even 2022, there was a strong rebound in mainland Spain tourism, with figures exceeding pre-pandemic levels. However, this recovery has not been sustained, particularly in the case of international tourists, who have been significantly affected by the reduction in air connectivity.

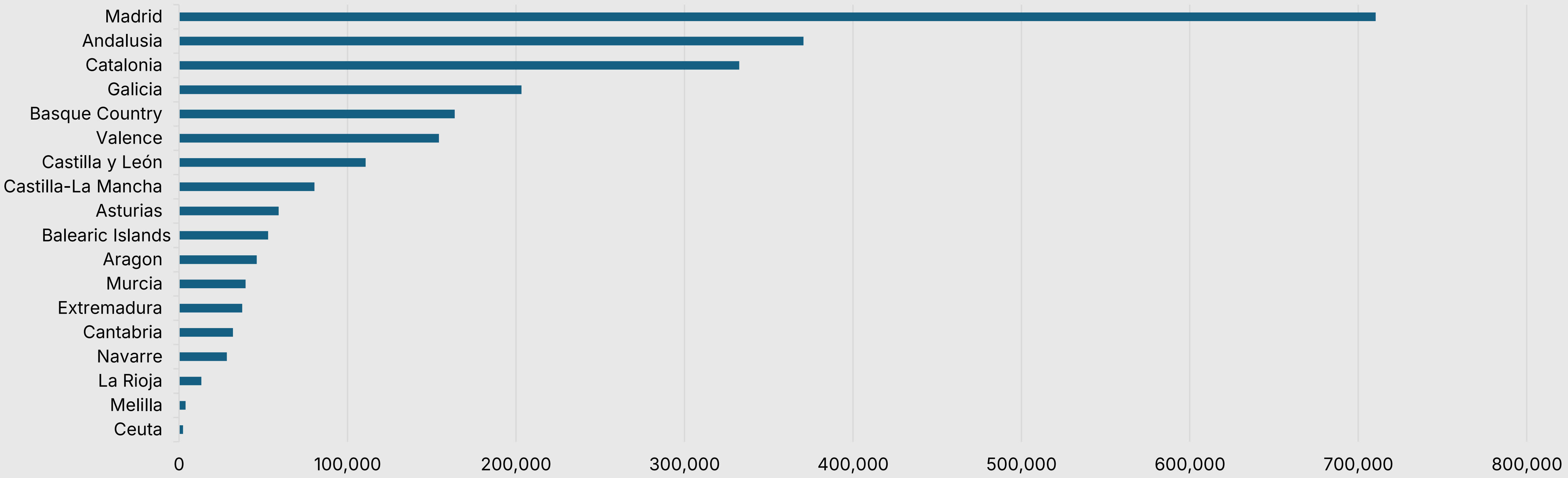
Arrival of tourists to La Palma



Source: FRONTUR-Canarias (ISTAC)

Tourism measurement using mobile phone data by the National Statistics Institute (INE) makes it possible to estimate the number of tourists arriving in the Canary Islands from each of Spain's autonomous communities. As shown, Madrid is the main source region, with over 700,000 visitors in 2024. It is followed by Andalusia and Catalonia, each with around 250,000 tourists. Compared to 2023, most autonomous communities have increased the number of tourists travelling to the islands. Notable increases were recorded in the Basque Country and Castilla-La Mancha, with rises of 19.5% and 15.4%, respectively. In contrast, Asturias, the Balearic Islands and Melilla are the only regions that experienced a decline in the number of tourists travelling to the Canary Islands.

Mainland tourists arriving in the Canary Islands by autonomous community of origin in 2024 and variation (%) compared to 2023

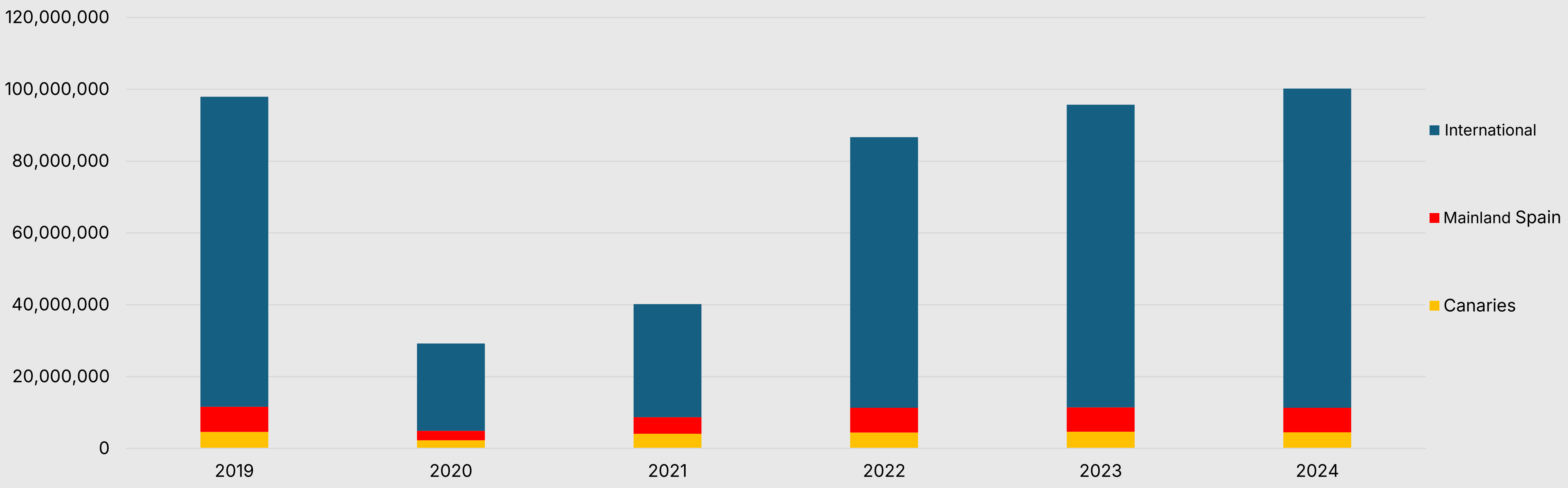


Source: Measurement of tourism from mobile phones (INE Experimental Statistics)

Tourist accommodation (hotels and apartments)

Foreign tourists continue to be the main contributors to overnight stays in hotels and apartments in the Canary Islands. In 2024, their overnight stays exceeded the levels of previous years, including 2019, the last pre-pandemic year. In contrast, overnight stays by mainland Spanish tourists and Canary Island residents experienced a slight decline compared to 2019, with decreases of 2.3% and 3.1%, respectively. The rise in prices, driven by strong demand from international tourism, may be behind this decline in overnight stays by mainland and resident tourists.

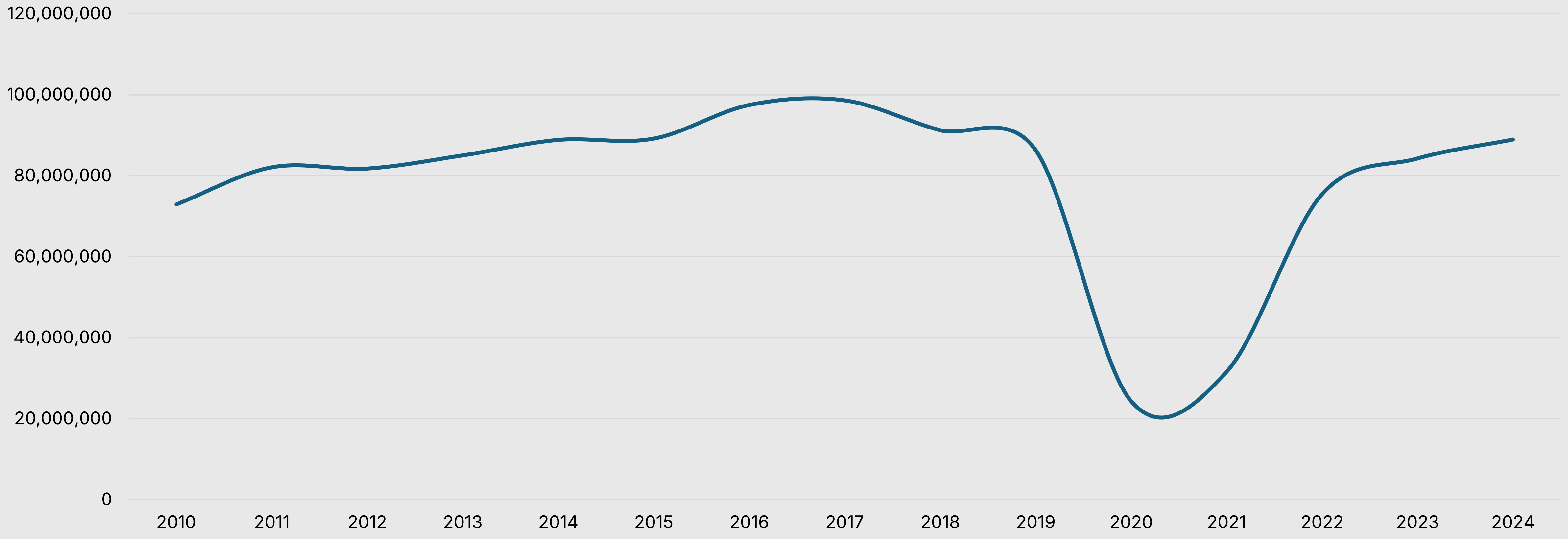
Overnight stays in hotels and apartments in the Canary Islands



Source: Tourist Accommodation Survey (ISTAC)

Overnight stays by foreign tourists in hotels and apartments in the Canary Islands showed steady growth between 2010 and 2017, followed by a slight contraction up to 2019. The sharp drop in 2020 reflects the impact of the global health crisis, with a gradual recovery beginning in 2021. By 2024, figures are approaching pre-pandemic levels, although they have not yet reached the peak recorded in 2017.

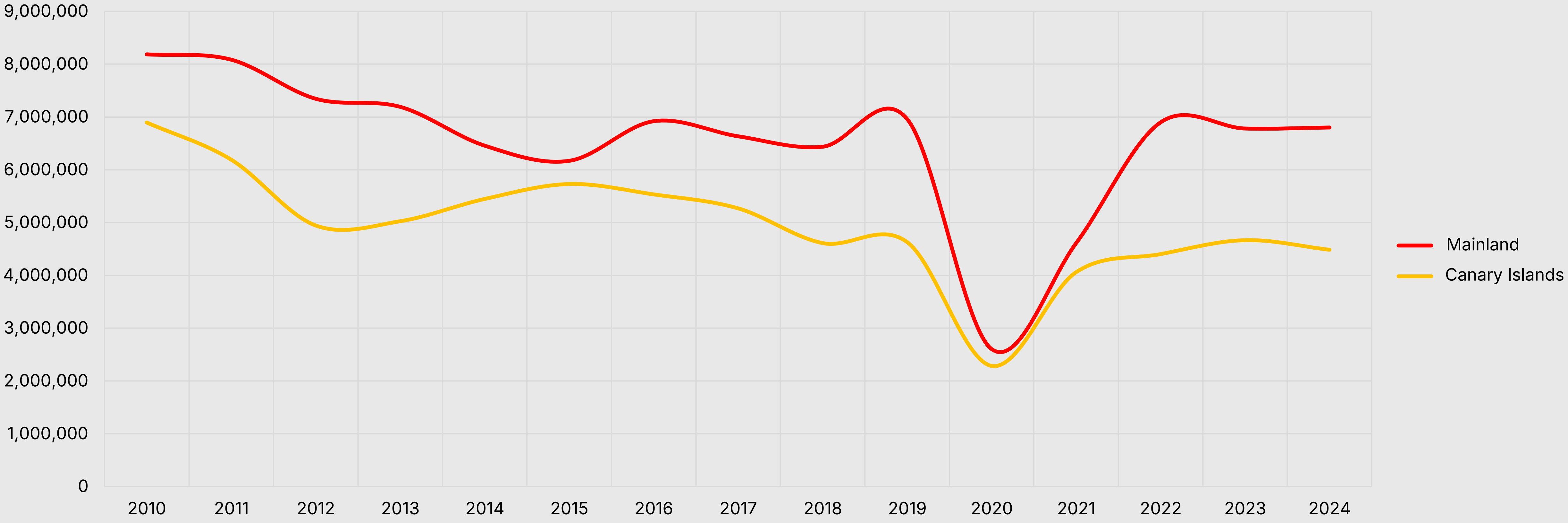
Evolution of overnight stays by foreigners in hotels and apartments in the Canary Islands



Source: Tourist Accommodation Survey (ISTAC)

Overnight stays in hotels and apartments in the Canary Islands have consistently been higher among mainland Spanish tourists than among Canary Island residents, with a stable gap over time. Following the pandemic, the recovery has been significant, although a slight slowdown is observed in 2024. This may be linked to the rising cost of traditional accommodation and the proliferation of alternatives, which has particularly affected local demand.

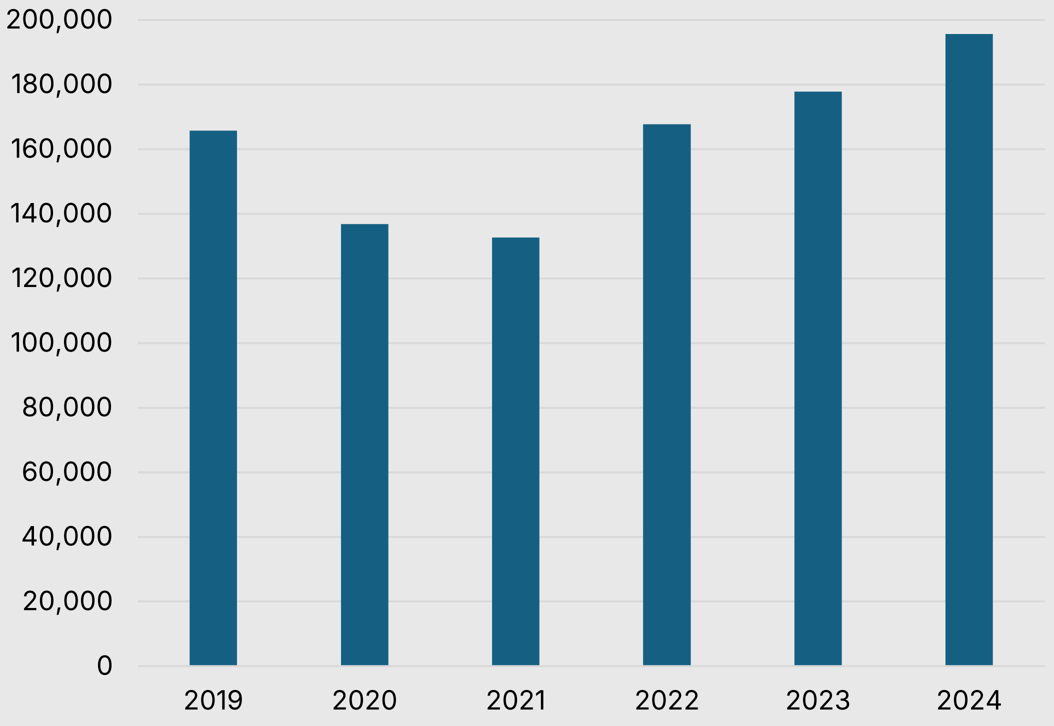
Evolution of overnight stays in hotels and apartments by mainland Spain and Canary Island tourists



Source: Tourist Accommodation Survey (ISTAC)

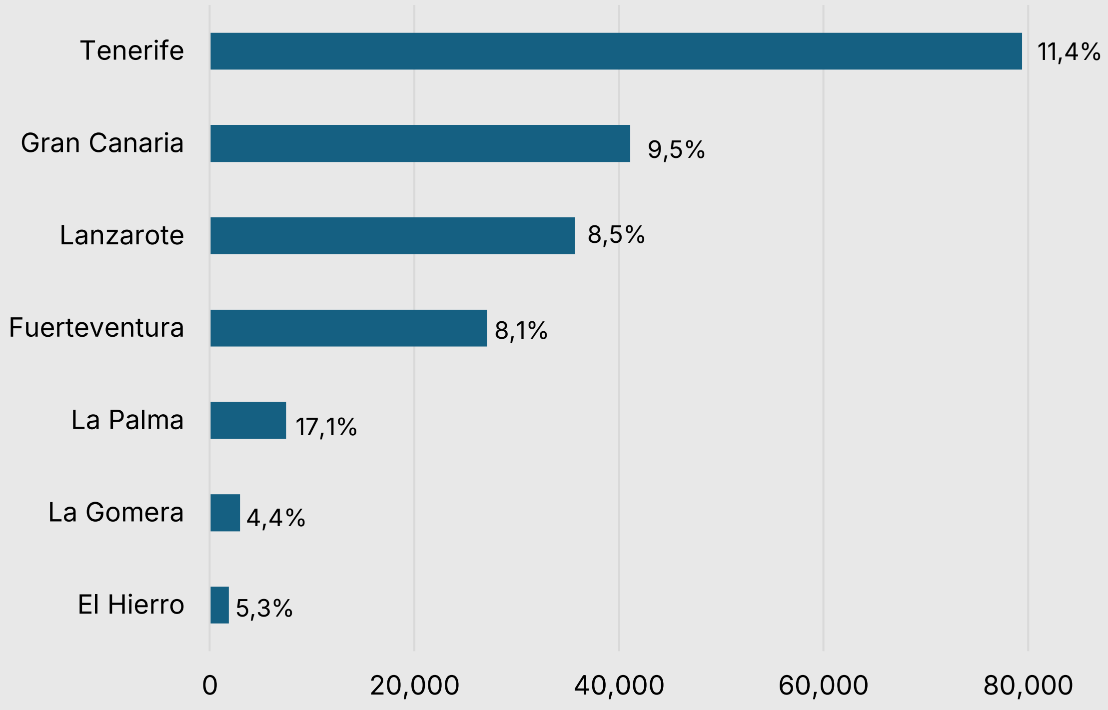
Holiday rental accommodation continues to grow year after year. Following the drop in the number of places available during the pandemic in 2020 and 2021, the supply has not only recovered but, by 2024, there are around 30,000 more places than in the pre-pandemic period. When analysing each island individually, Tenerife ranks as the island with the highest number of places, with around 80,000, followed by the three islands of the eastern province. In terms of growth compared to 2023, although all islands show increases, La Palma stands out with a 17.1% rise in the number of places offered in this type of accommodation. Meanwhile, La Gomera and El Hierro have recorded more moderate increases of 4.4% and 5.3%, respectively.

Holiday home bed places in the Canary Islands



Source: Tourist Accommodation Survey (ISTAC)

Holiday home bed places by island in 2024, and variation (%) compared to 2023

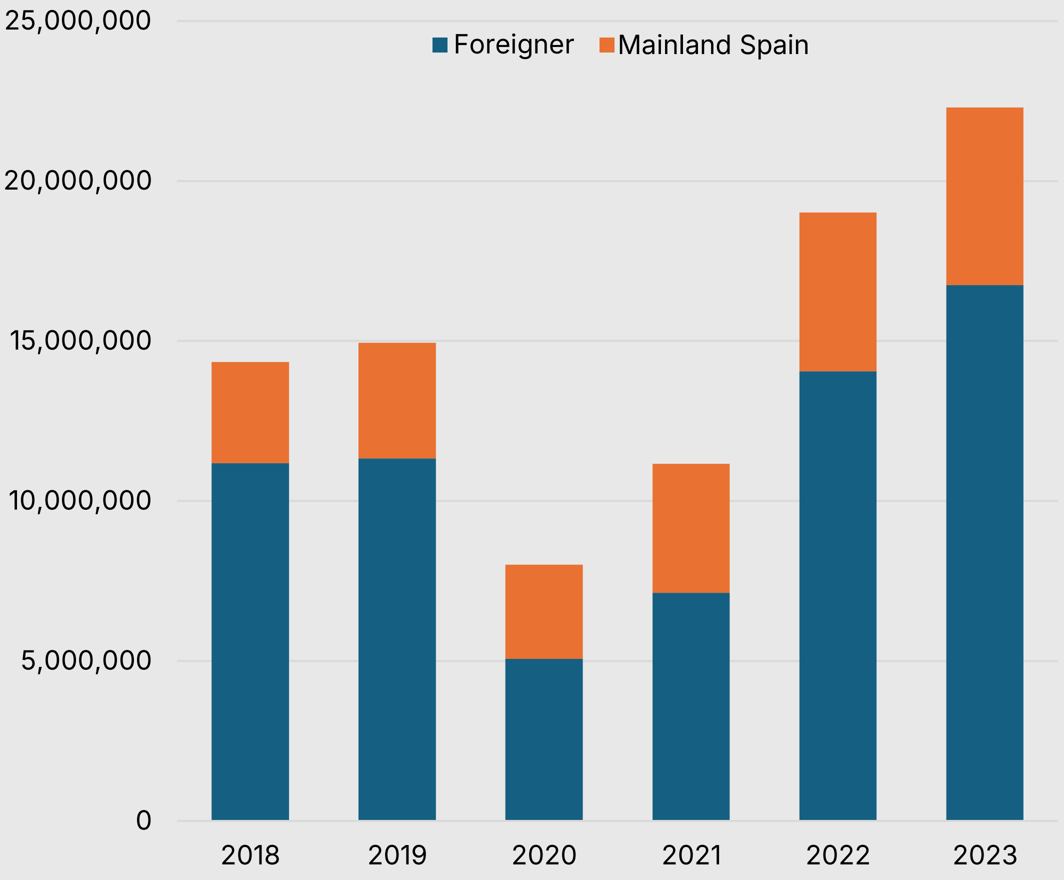


Source: Tourist Accommodation Survey (ISTAC)

The occupancy statistics for tourist accommodation within the experimental section of Spain's National Statistics Institute (INE) allow for the estimation of overnight stays in holiday rental properties in the Canary Islands. As shown, the upward trend that was already present before the pandemic has continued, and even accelerated, in recent years. Between 2018 and 2023, the number of overnight stays increased by 55.4%, highlighting the growing significance of this type of accommodation within the tourism sector. This evolution suggests that holiday rentals have not only gained prominence but also increasingly serve as a complement to traditional lodging options, adapting to new market demands and diversifying the tourism experience across the archipelago.

During the pandemic years, domestic tourism accounted for a larger share of total overnight stays due to restrictions on international travel. However, following the recovery of foreign tourism, figures have tended to return to previous levels, reflecting a normalisation in demand distribution.

Overnight stays in short term rentals in the Canary Islands, according to the traveller's residence

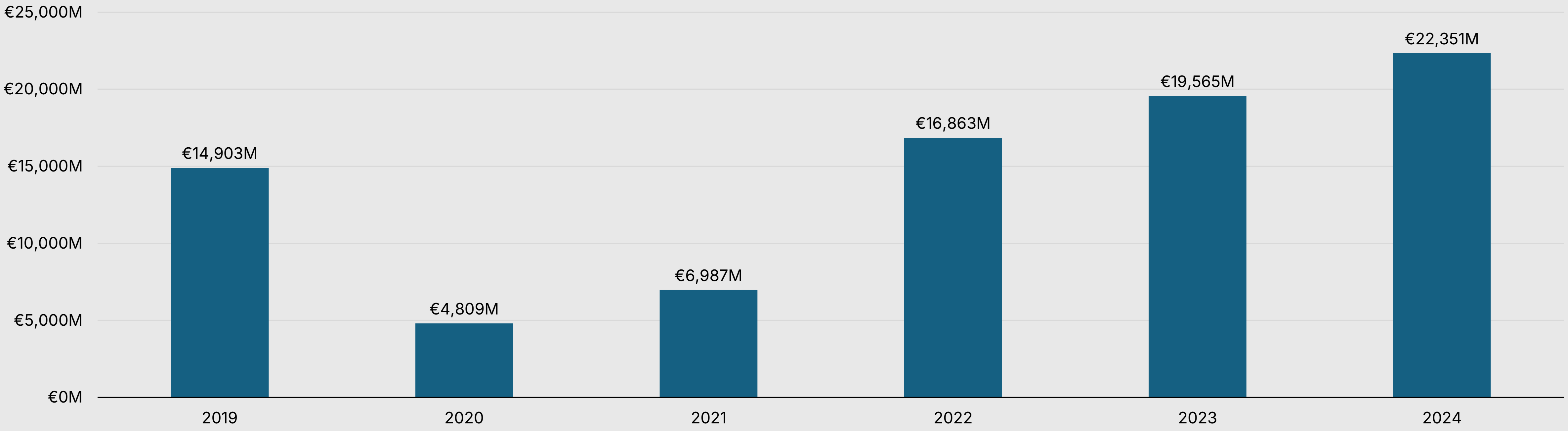


Source: Occupancy in Tourist Accommodation (INE Experimental Statistics)

Tourist expenditure

Tourist expenditure in the Canary Islands has experienced a significant recovery following the pandemic, reaching nearly 22.4 billion euros in 2024, an increase of 50.0% compared to 2019. This growth reflects the resilience of the sector after the health crisis, driven by the rebound in demand, as well as the effects of inflation and rising prices. However, to ensure long-term sustainability, it is essential to accompany this growth with strategies that promote diversification of the tourism offer and a more balanced model, one that generates economic benefits without compromising the archipelago's environment.

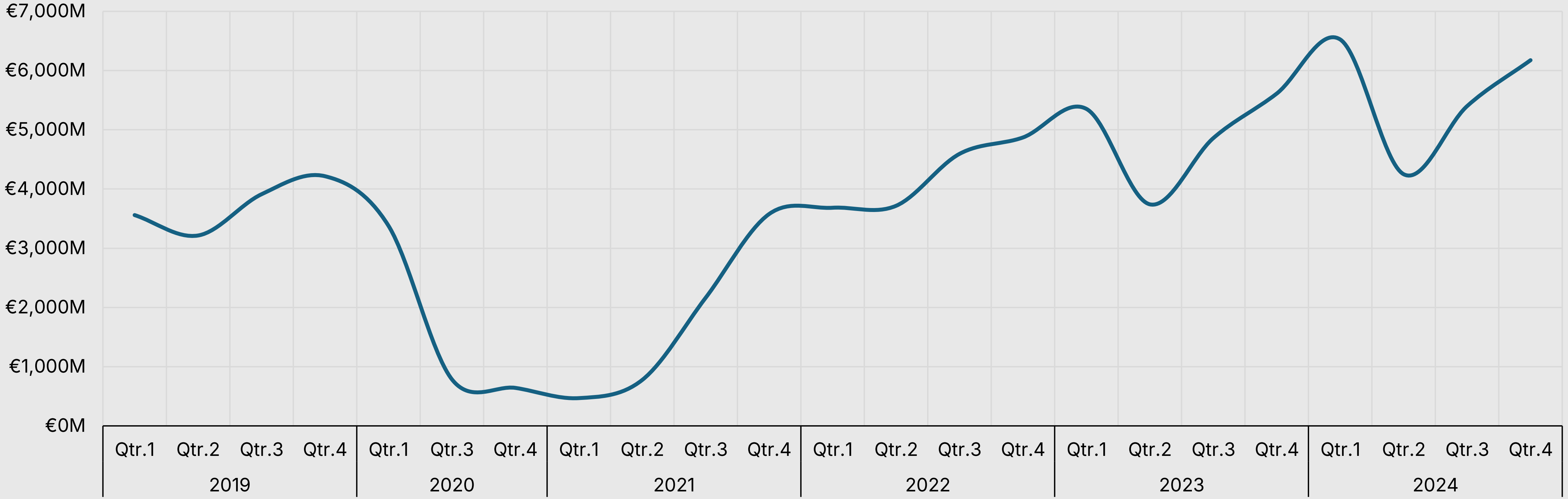
Tourist expenditure by foreigners and mainland tourists at current prices in the Canary Islands



Source: Survey on Tourist Expenditure (ISTAC)

Quarterly tourist expenditure in the Canary Islands has shown a steady recovery following the 2020 downturn, with progressive growth and marked seasonality, winter months registering the highest values of the year. From 2021 onwards, the upward trend reflects the sector's reactivation, culminating in a historic peak in the first quarter of 2024, when expenditure reached 6.5 billion euros, consolidating the strength of tourism in the archipelago.

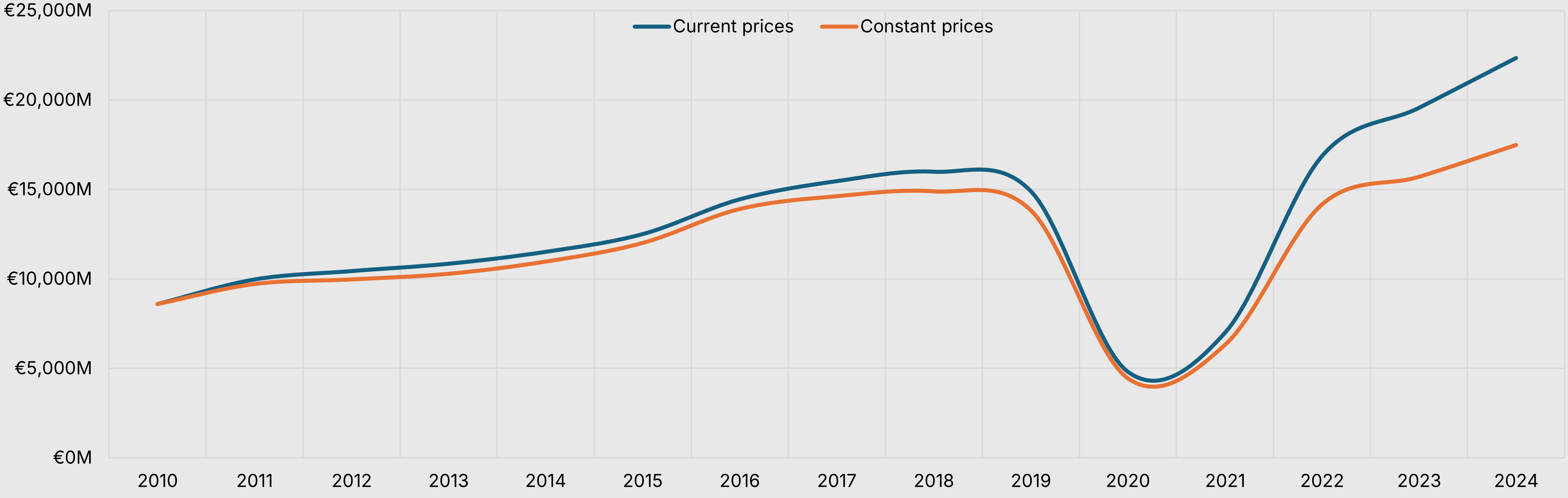
Quarterly aggregate tourist expenditure at current prices in the Canary Islands in euros



Note: No data were released for the second quarter of 2020. Foreign and mainland tourists. Source: Survey on Tourist Expenditure (ISTAC)

Tourist expenditure in the Canary Islands has followed an upward trend since 2010, although growth slowed in 2019 and dropped sharply in 2020 due to the pandemic. From 2021 onwards, the recovery has been strong, driven by the rebound in tourism. However, the growing gap between current and constant prices highlights the impact of inflation on the economy, underlining the importance of analysing not only nominal growth but also its real effect on purchasing power and profitability.

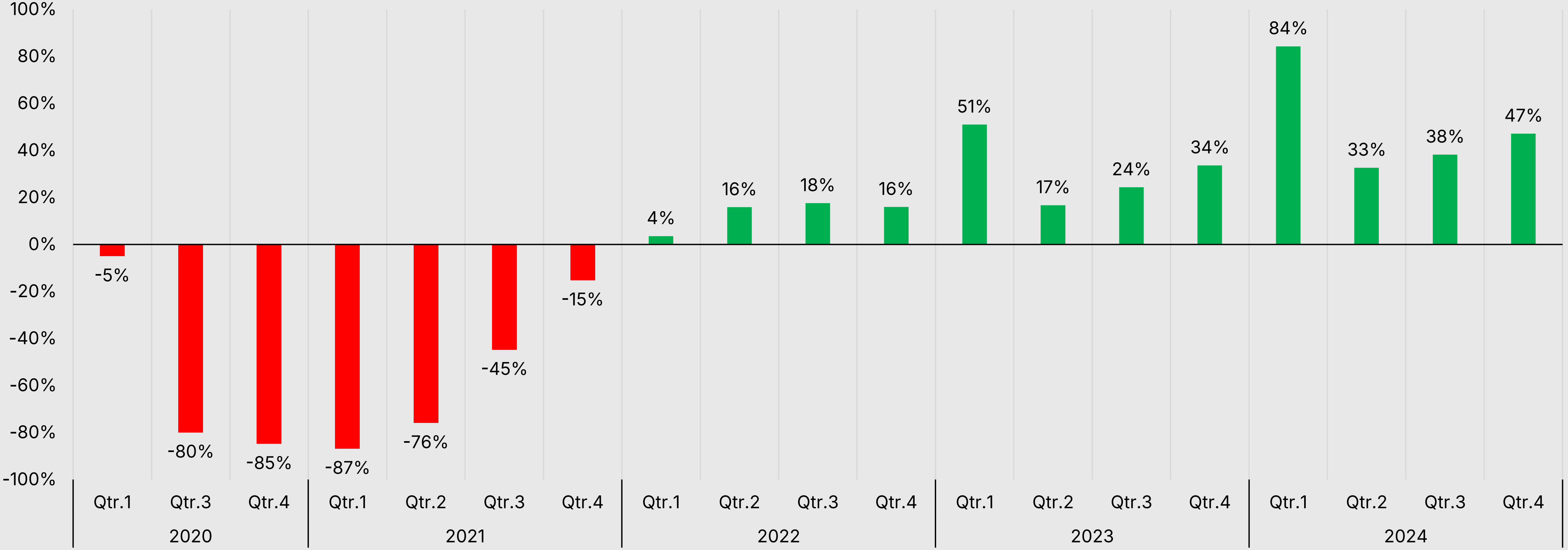
Aggregate annual tourist expenditure, at current and constant prices, of foreign and mainland tourists arriving in the Canary Islands



Note: Base year 2010. Source: Survey on Tourist Expenditure (ISTAC)

The variation in tourist expenditure in the Canary Islands reflects a notable recovery following the 2020 crisis, with sustained growth from 2021 onwards and a sharp upturn in the first quarters of both 2023 and 2024. The surpassing of pre-pandemic levels suggests greater spending willingness and increased demand, largely driven by the rebound in international tourism.

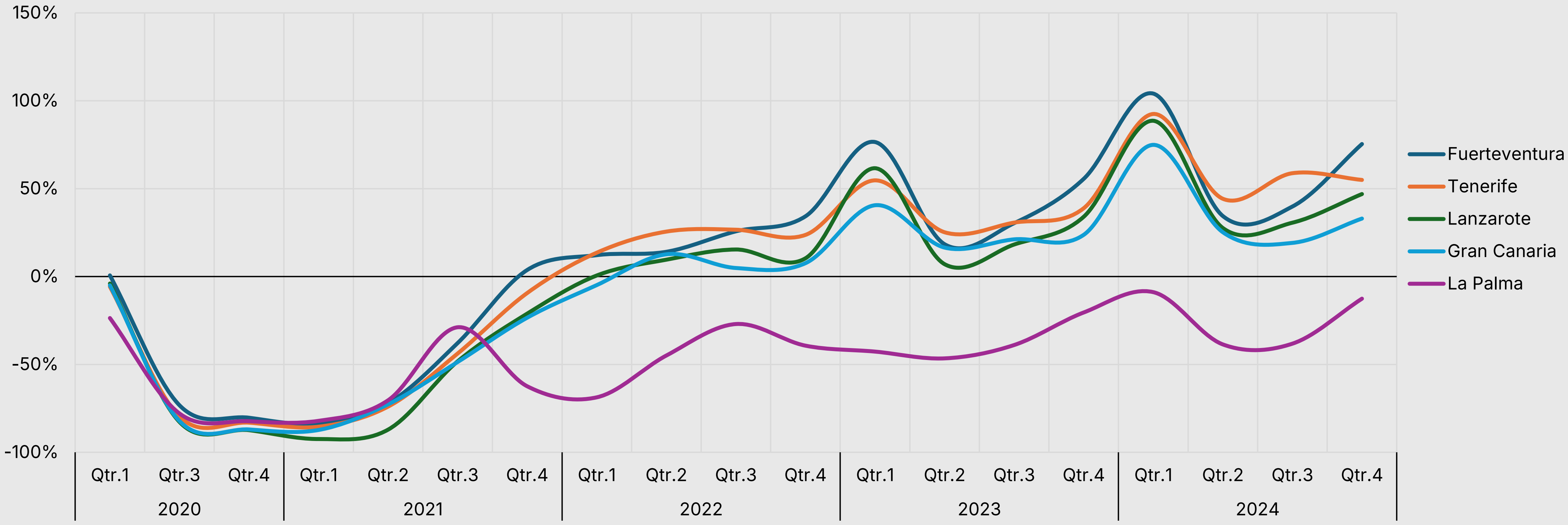
Change (%) in aggregate tourism expenditure at current prices compared to the same quarter of 2019



Note: No data were released for the second quarter of 2020. Foreign and tourists from the rest of Spain. Source: Survey on Tourist Expenditure (ISTAC)

The recovery of tourist expenditure in the Canary Islands has followed a positive trend since 2021, with sustained growth. All islands, except La Palma, show an upward trajectory, although La Palma's recovery has been slower, possibly due to factors such as the impact of the volcanic eruption and reduced air connectivity. The figures recorded in the first quarters of 2023 and 2024 are particularly noteworthy, highlighting the Canary Islands' strong potential as a winter tourist destination.

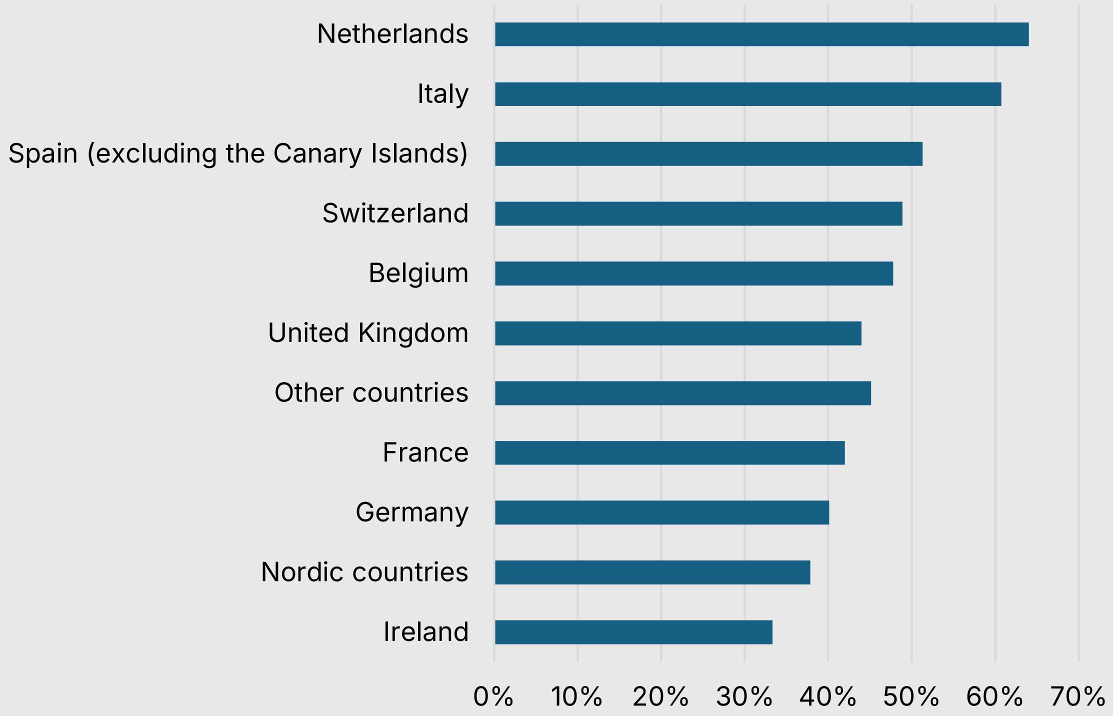
Change (%) in aggregate tourism expenditure at current prices compared to the same quarter of 2019



Note: No data were released for the second quarter of 2020. Foreign and mainland tourists. Source: Survey on Tourist Expenditure (ISTAC)

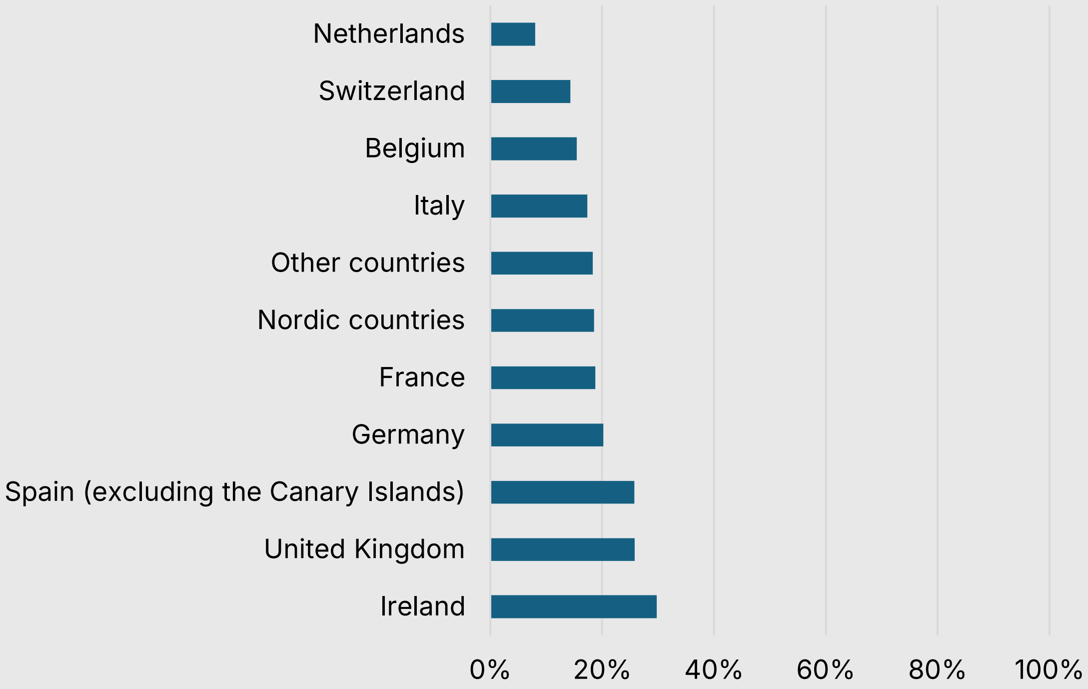
The impact of an overnight stay tax, or tourist tax on destination choice varies by country of origin. Although most tourists have paid this tax at other destinations in the past five years, a significant proportion tend to avoid places where it is applied. Countries such as Ireland and the United Kingdom show greater sensitivity to these taxes, with approximately 25% of tourists from these markets ruling out destinations that impose them. At the other end of the spectrum are the Netherlands, where only 8% of tourists exclude such destinations when choosing their holiday location.

Tourists who have visited a holiday destination where they paid a tourist tax (tourist fee) in the five years prior to 2024.



Source: Survey on Tourism Expenditure 2024 (ISTAC)

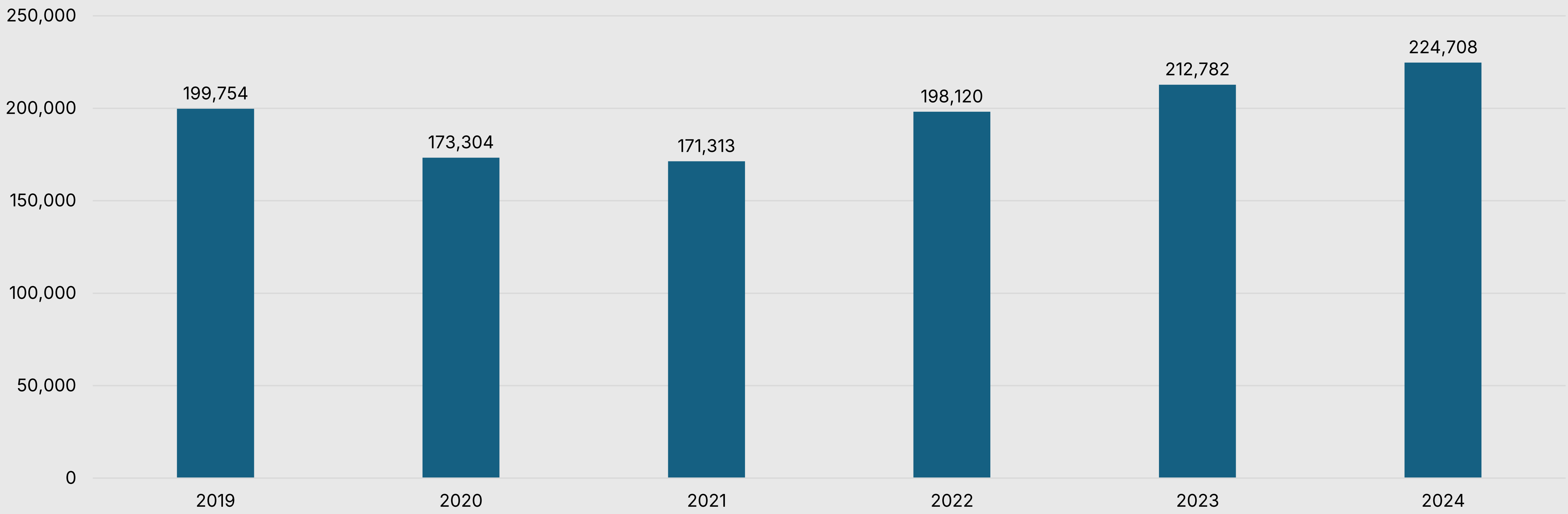
Percentage of tourists who tend to exclude destinations that impose a tourist tax



Source: Survey on Tourism Expenditure 2024 (ISTAC)

Employment in the tourism sector in the Canary Islands has shown sustained growth since 2021, reaching its highest level in 2024 with 224,708 registered workers, an increase of 12.5% compared to 2019. This rise not only reflects the recovery of tourism but also its positive impact on job creation across the archipelago.

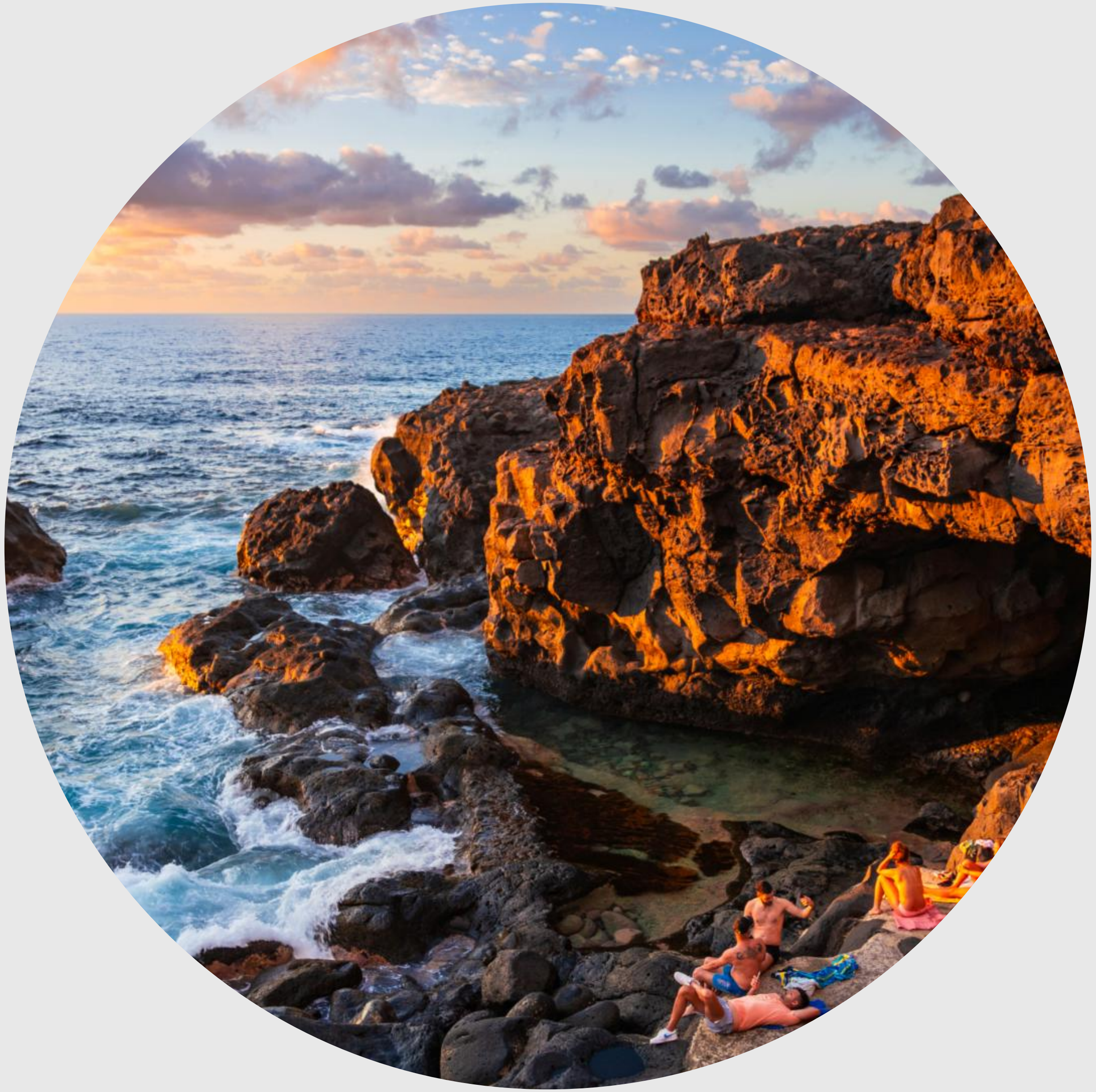
Employment in activities characteristic of tourism in the Canary Islands



Source: Statistics on Social Security Affiliation by Place of Residence (ISTAC)

4.

Key issues for tourism sustainability



Key issues for tourism sustainability

Key area of tourism sustainability in the Canary Islands	Relationship with INSTO-UNWTO areas
1. Destination attractiveness and tourist satisfaction	Canary Islands Specific Area
2. Seasonality of tourism	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. Digitalisation, 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 renewal	Canary Islands Specific issue
15. Universal accessibility and inclusivity	INSTO Mandatory issue
16. Governance	INSTO Mandatory issue

INSTO (United Nations Tourism) Required areas

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

4.1

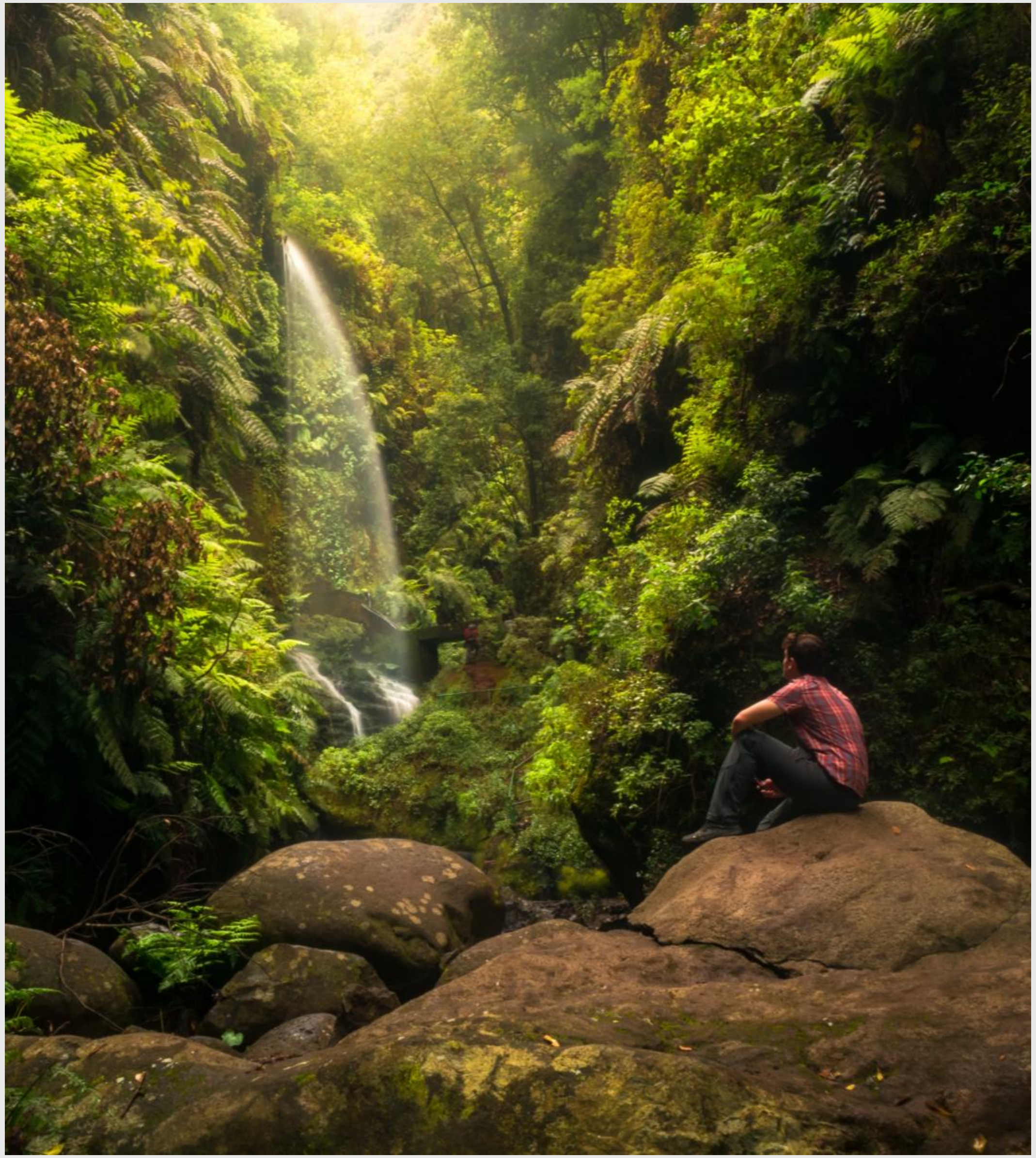
Destination attractiveness and tourist satisfaction

Introduction

The Canary Islands have consolidated their position as a leading global tourist destination, renowned for their unique appeal combining year-round exceptional climate, diverse landscapes, a tolerant and safe environment, and a rich cultural heritage. Climate was a decisive factor in the choice of the Canary Islands as a holiday destination for 75.6% of tourists in 2024.

The archipelago also stands out for the high satisfaction levels of its visitors. In 2024, 97.1% of tourists stated that their holidays in the islands met or exceeded their expectations, rating their experience 8.74 out of 10 (ISTAC, 2024). Notably, 70.9% of tourists who visited the Canary Islands in 2024 had done so previously (ISTAC, 2024).

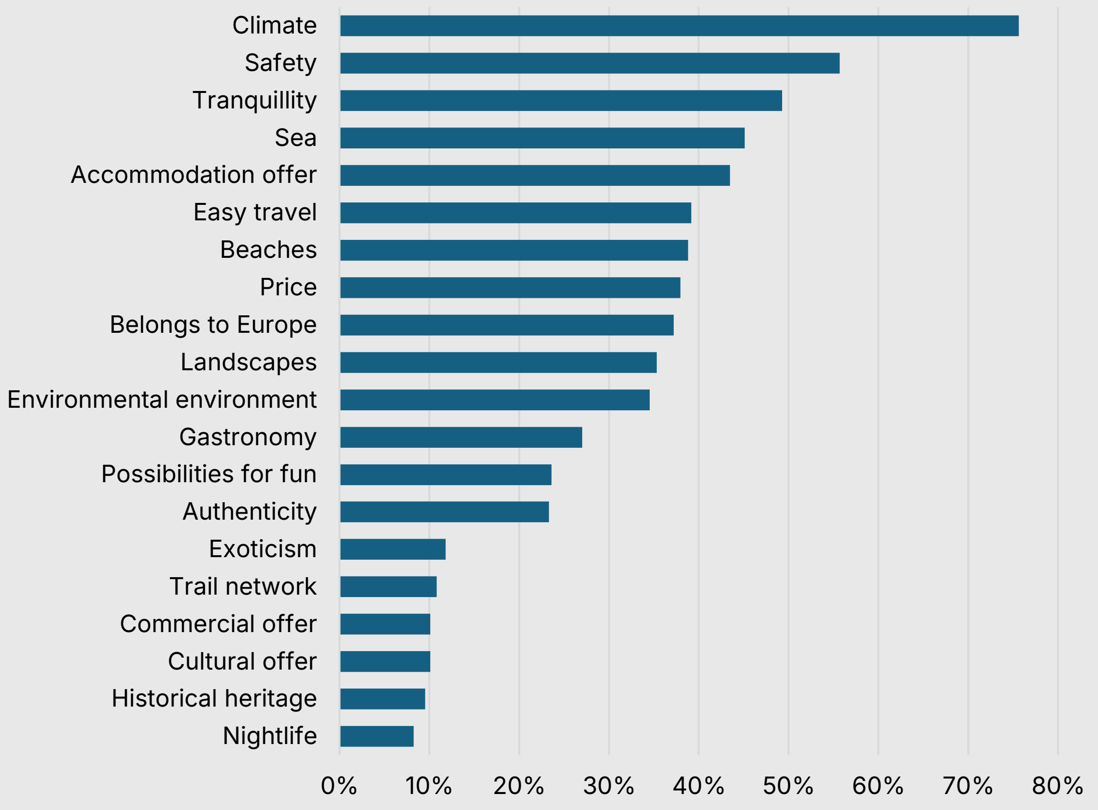
The Canary Islands face the challenge of further diversifying their tourism offer. According to the Tourist Expenditure Survey (ISTAC, 2024), certain aspects complementary to the core tourism offer are rated less favourably by visitors when choosing the Canary Islands as a destination. The challenges of economic sustainability call for improvements in the tourism products offered, in order to deliver experiences capable of competing in the complex international tourism landscape. Moreover, the promotion of the Canary Islands as a destination must consider which products are most beneficial for the region and how to maintain a balance between tourism appeal and avoiding congestion issues that have emerged in many international destinations in recent years.



Attraction of the destination

Climate is, without doubt, the main attraction for tourists visiting the Canary Islands. Other factors such as safety, tranquillity, the sea, and the range of accommodation also remain key reasons for choosing the destination. However, in 2024, some noteworthy variations can be observed compared to the previous year. Compared to the previous year, greater importance is given to safety and price as selection factors. Likewise, the Canary Islands' status as part of Europe gains some relevance as a reason for choosing the destination.

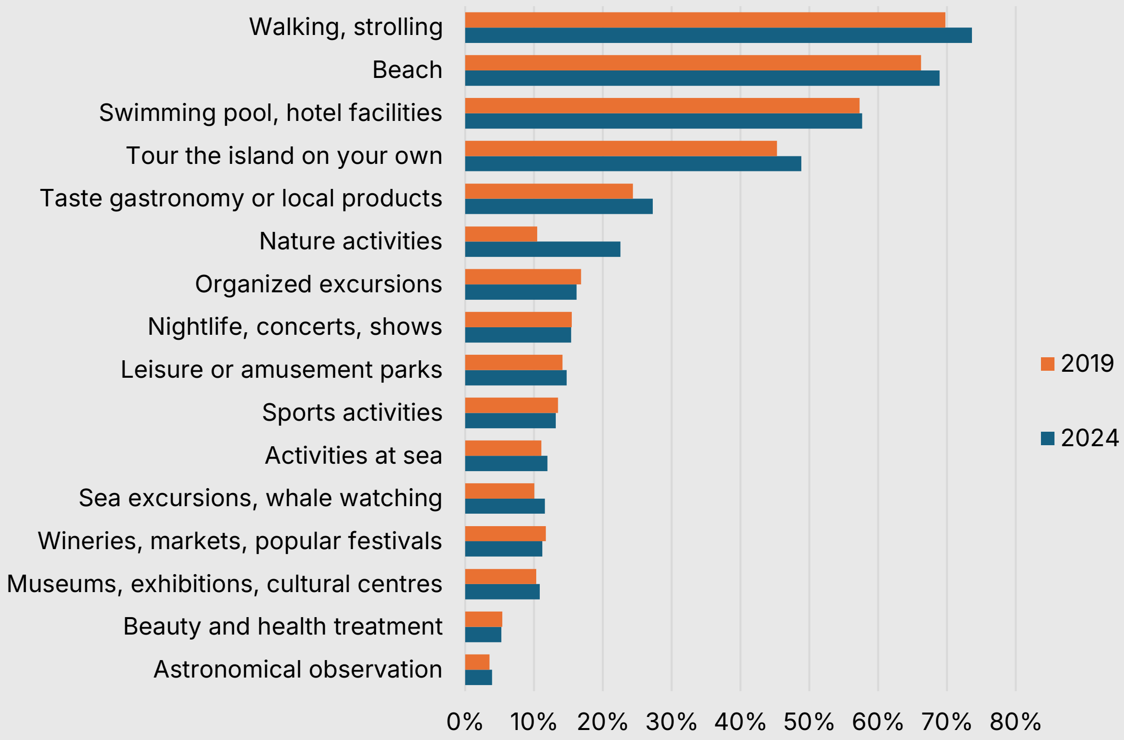
Percentages of tourists according to the importance of different aspects in the choice of the Canary Islands. 2024



Note: Includes foreigners and mainland Spain tourists. For each aspect there are 4 alternative answers (“Very much", “Quite a lot", “Something", "Nothing"). The data in the graph refers to the percentage of tourists who selected the answer "Very much". Source: Statistics on Tourist Expenditure (ISTAC)

The main activities carried out by tourists during their stay in the Canary Islands in 2024 were walking (73.6%), going to the beach (68.9%), using the hotel pool and facilities (57.7%), and exploring the island independently (48.8%). In contrast, the least frequent activities included stargazing (3.9%), beauty and wellness treatments (5.2%), visiting museums, exhibitions and cultural centres (10.8%), and visiting wineries, local markets and traditional festivities (11.2%).

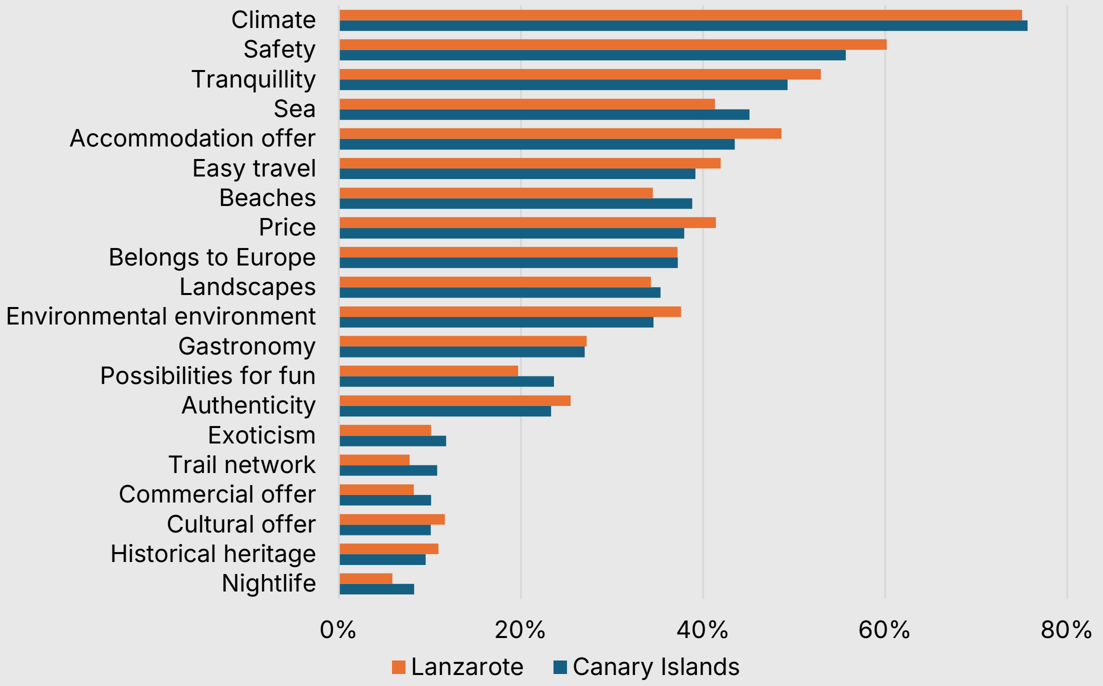
Percentage of foreign and mainland tourists who carried out the following activities during their stay in the Canary Islands



Source: Statistics on Tourist Expenditure (ISTAC)

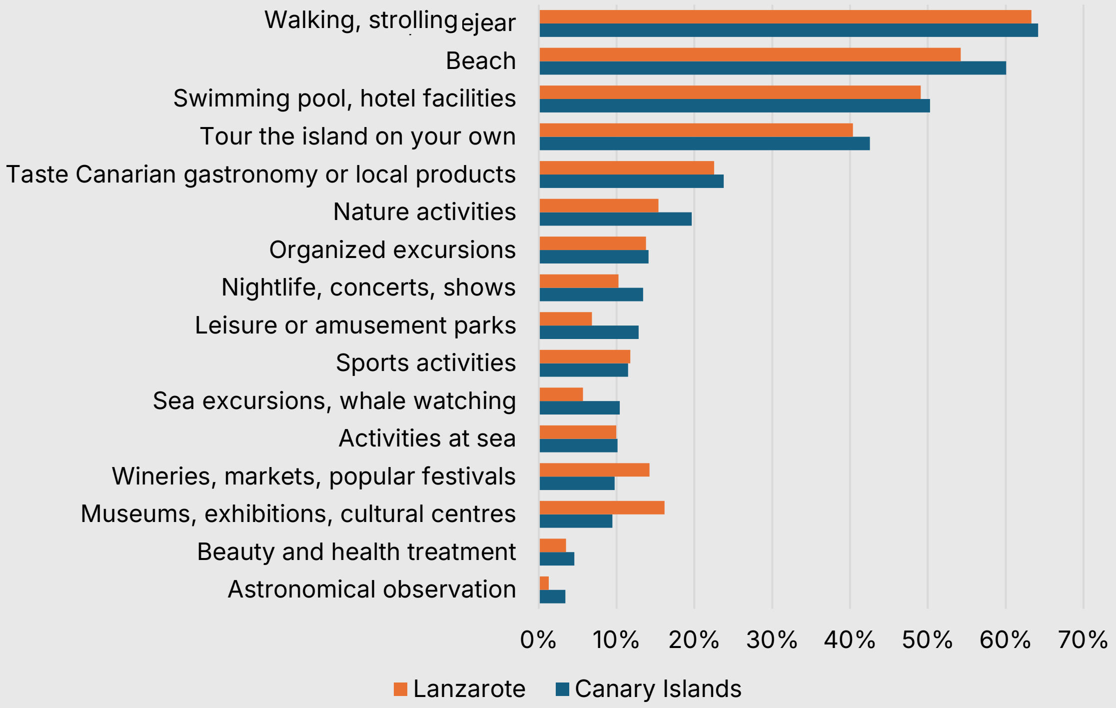
The main factors influencing tourists' choice of Lanzarote as a destination and the activities undertaken during their stay are shown below. In 2024, climate, safety and tranquillity were the most highly valued aspects when choosing the island, each rated by over 70% of visitors. As for the most common activities, these included walking and strolling, going to the beach, and enjoying the hotel pool and facilities, followed by touring the island and experiencing the local gastronomy.

Percentage of tourists according to the importance of aspects in the choice of Lanzarote in 2024



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: Survey on Tourist Expenditure (ISTAC)

Percentage of tourists according to activities they do in Lanzarote in 2024



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: Survey on Tourist Expenditure (ISTAC)

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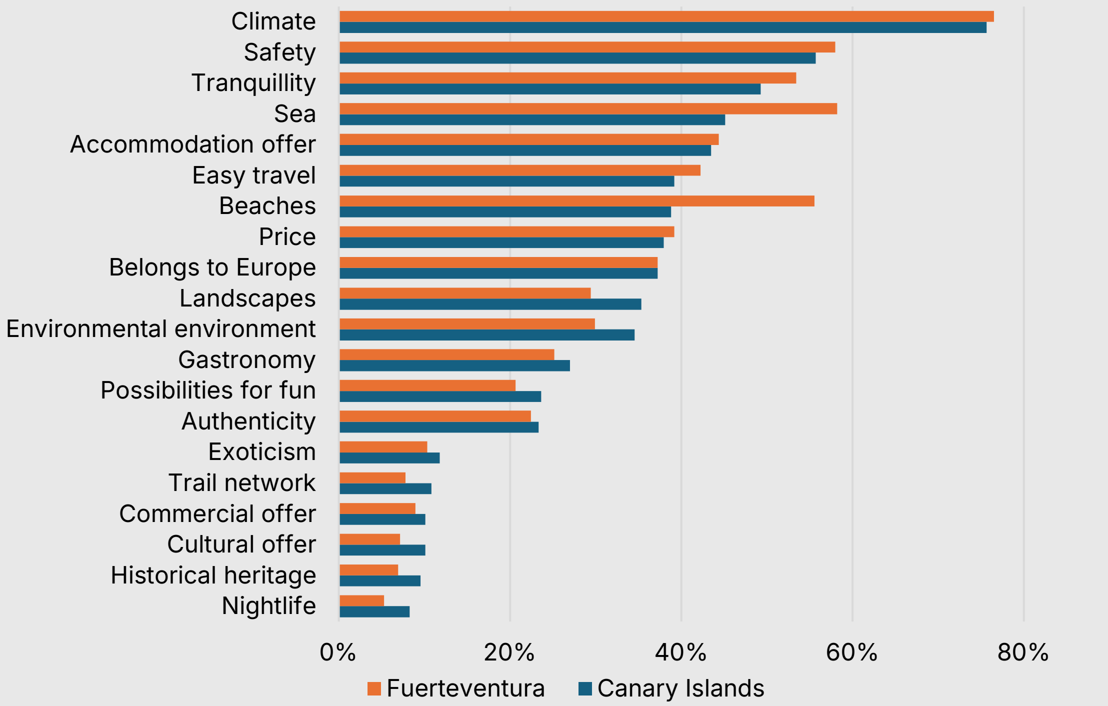
The charts show the main factors influencing tourists' choice of Fuerteventura as a destination and the activities they engaged in during their stay. Climate, the sea and beaches were the most highly valued aspects for a significant proportion of visitors when choosing the island. The most common activities included going to the beach, walking, and enjoying the hotel pool and facilities, followed by touring the island. However, other activities such as visiting museums or exhibitions, or going to wineries, markets, and local festivities, held less importance in Fuerteventura compared to the Canary Islands overall.

Percentage of tourists according to the importance of aspects in the choice of Fuerteventura in 2024



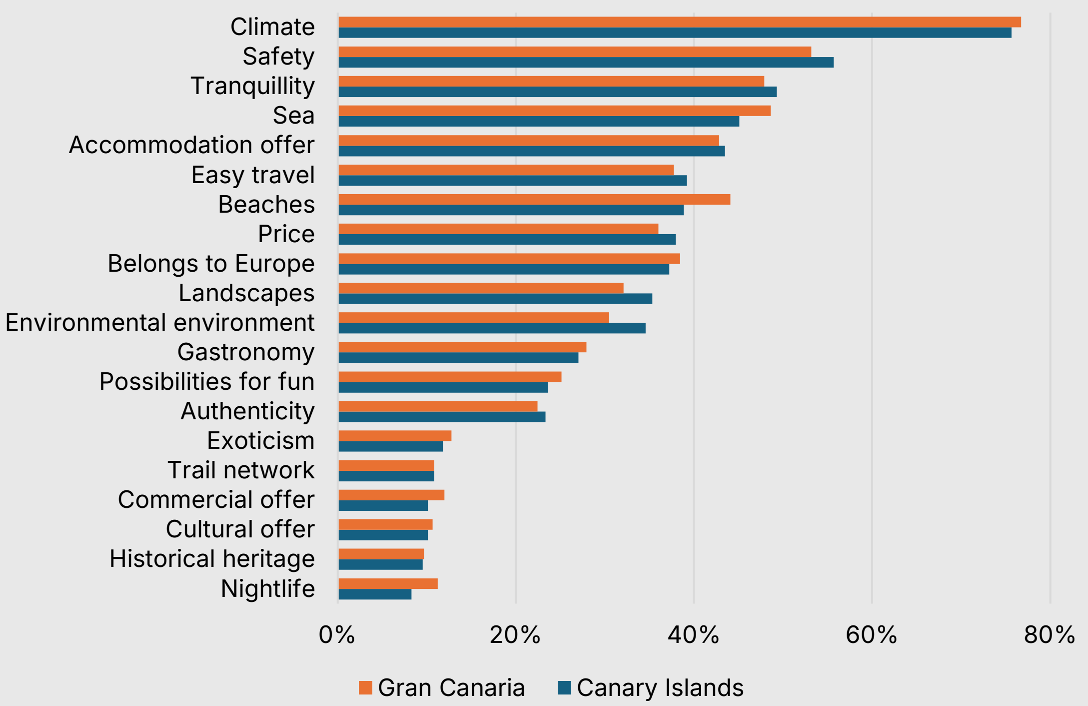
Note: For each aspect there are 4 different answers ("Very much", "Quite a lot", "Something", "Nothing"). The data in the graph refer to the percentage of tourists who selected the answer "Very much". Source: Survey on Tourist Expenditure (ISTAC)

Percentage of tourists according to activities they do in Fuerteventura in 2024

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: Survey on Tourist Expenditure (ISTAC)

The charts show the main factors influencing tourists' choice of Gran Canaria as a destination and the activities undertaken during their stay. Climate, safety and the sea were the most highly valued aspects, with 76.7%, 53.2% and 47.9% of visitors, respectively, selecting them as key reasons for choosing the island. The most common activities included going to the beach, walking, and enjoying the hotel pool and facilities, followed by touring the island. However, other activities such as concerts and shows were less relevant in Gran Canaria compared to the Canary Islands overall.

Percentage of tourists according to the importance of aspects in the choice of Gran Canaria in 2024



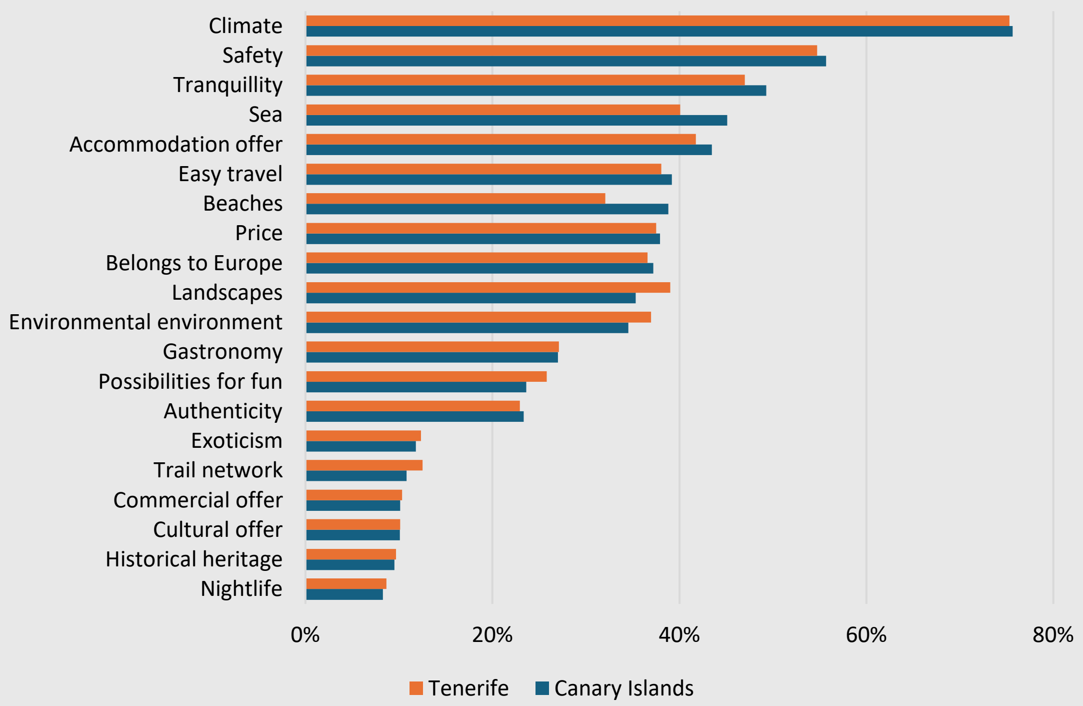
Note: For each aspect there are 4 different answers ("Very much", "Quite a lot", "Something", "Nothing"). The data in the graph refer to the percentage of tourists who selected the answer "Very much". Source: Survey on Tourist Expenditure (ISTAC)

Percentage of tourists according to activities they do in Gran Canaria in 2024

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: Survey on Tourist Expenditure (ISTAC)

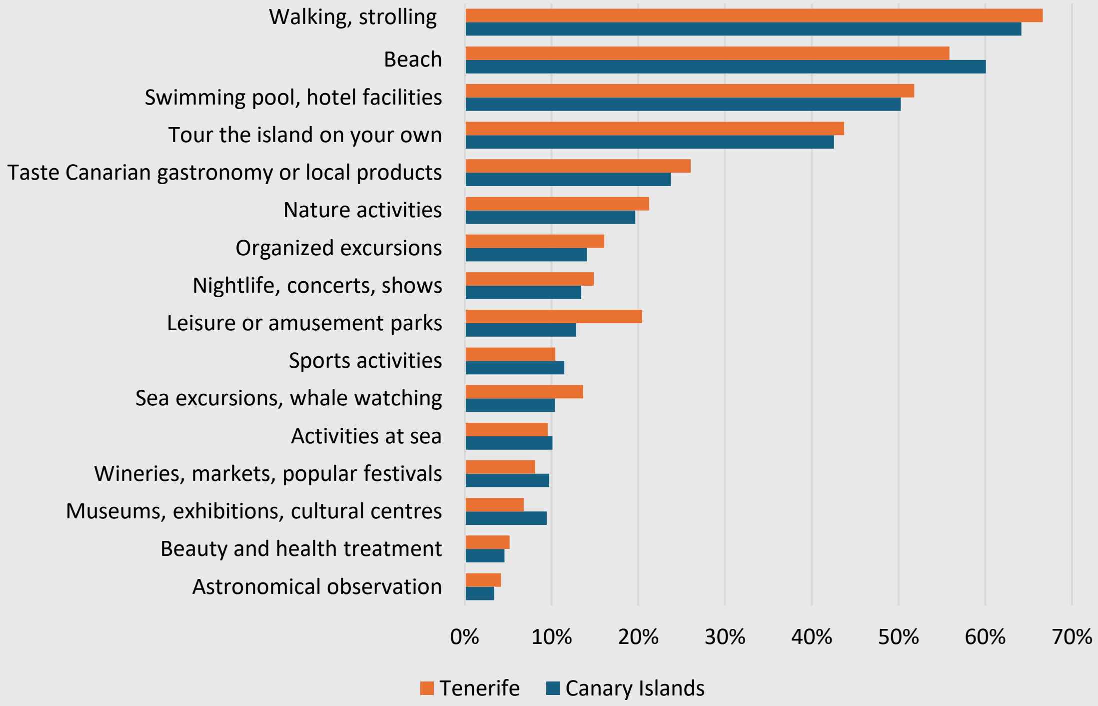
Climate, safety and tranquillity are the most highly valued aspects for visitors when choosing the island, with a notably high percentage citing these factors. As for activities, walking, going to the beach, and enjoying the hotel pool and facilities stand out, followed by touring the island. However, there are significant differences between maritime excursions and whale watching.

Percentage of tourists according to the importance of aspects in the choice of Tenerife in 2024



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: Survey on Tourist Expenditure (ISTAC)

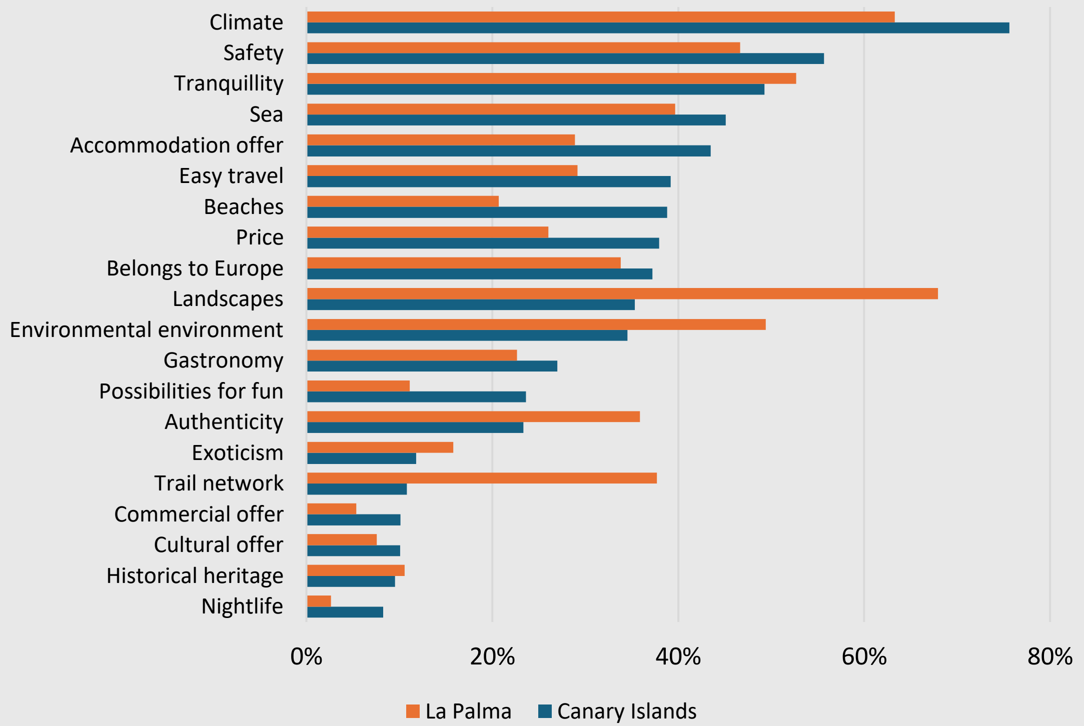
Percentage of tourists according to activities they do in Tenerife in 2024



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: Survey on Tourist Expenditure (ISTAC)

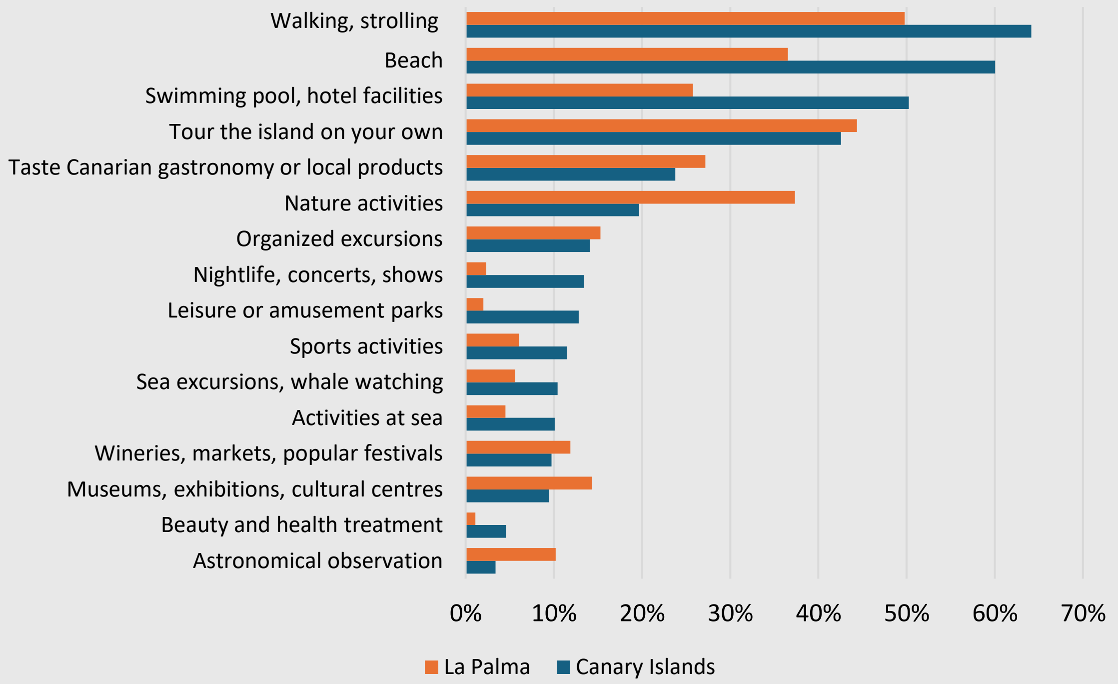
The charts show the main factors influencing tourists' choice of La Palma as a destination and the activities they engaged in during their stay. Landscapes, climate and tranquillity were the most highly valued aspects when choosing the island. The most common activities included walking, exploring the island independently and engaging in nature-based activities, followed by enjoying the beach. La Palma shows greater differences in tourist activities compared to the rest of the archipelago. Activities such as stargazing are particularly relevant on the island, along with visits to museums and wineries, highlighting its distinctive offer focused on nature tourism and local culture.

Percentage of tourists according to the importance of aspects in the choice of La Palma in 2024



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

Percentage of tourists according to activities they carry out in La Palma in 2024

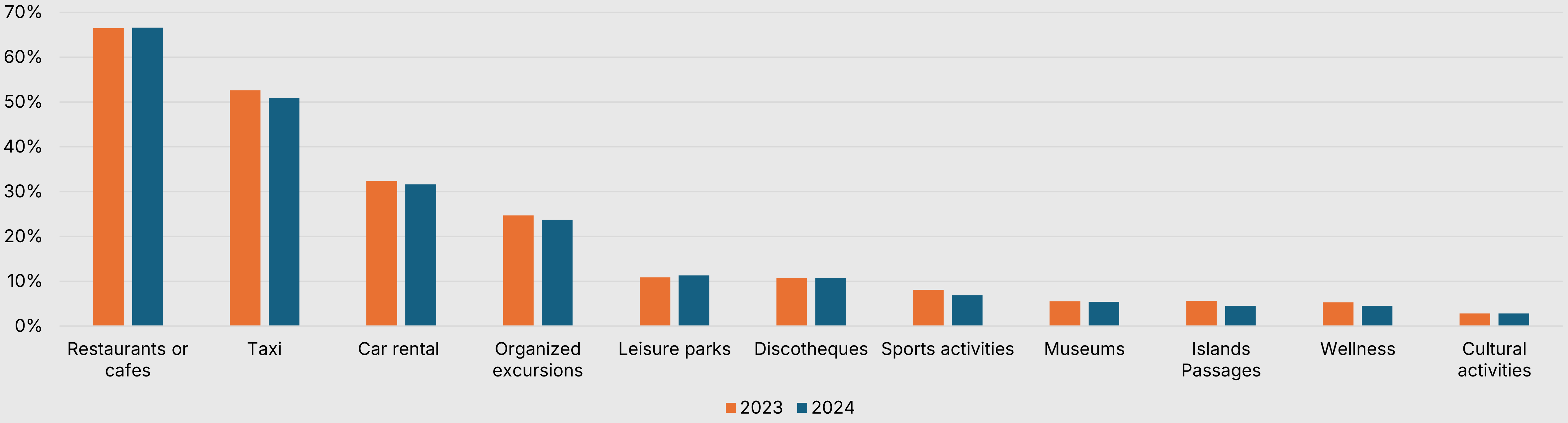


Note: For each aspect there are 4 different answers ("Very much", "Quite a lot", "Something", "Nothing"). The data in the graph refers to the percentage of tourists who selected the answer "Very much". Source: Survey on Tourist Expenditure (ISTAC)

Main items of expenditure made at destination

In 2024, the majority of tourists in the Canary Islands spent money on dining out (67%), followed by taxi services (51%), car hire (32%), and organised excursions (24%). However, this does not mean that these sectors account for the highest volume of expenditure, but rather that they are the most commonly used. Other activities were consumed by a smaller proportion of tourists, with the low participation in cultural activities being particularly notable. These figures highlight the potential to diversify tourist spending and promote greater expenditure on sustainable and cultural experiences.

Percentage of tourists who spend on different services in the Canary Islands

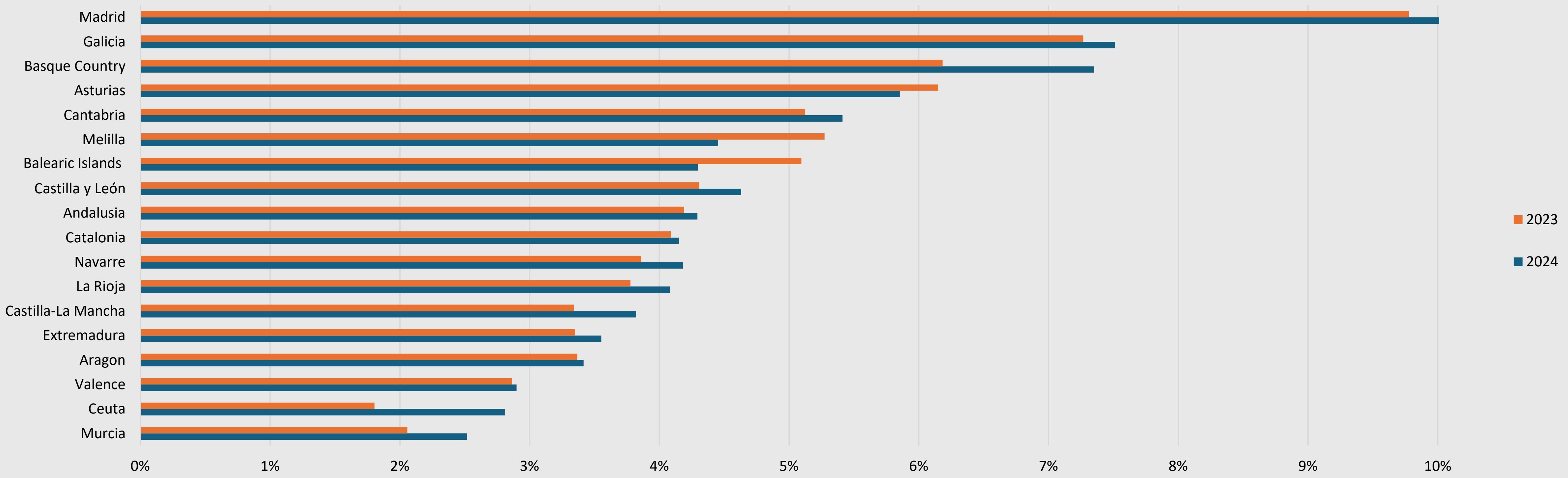


Sources: Promotur, based on the Survey on Tourist Expenditure (ISTAC)

Attraction of the Canary Islands for mainland tourism

The autonomous communities with the highest propensity to visit the Canary Islands in 2024 were Madrid, Galicia and the Basque Country, with 10.1%, 7.5% and 7.4% of trips in relation to each region's population, respectively. At national level, trips made by tourists from the rest of Spain amounted to 5.3% of the total population. A general increase in visits was observed across all regions compared to 2023, except in the cases of Melilla and the Balearic Islands.

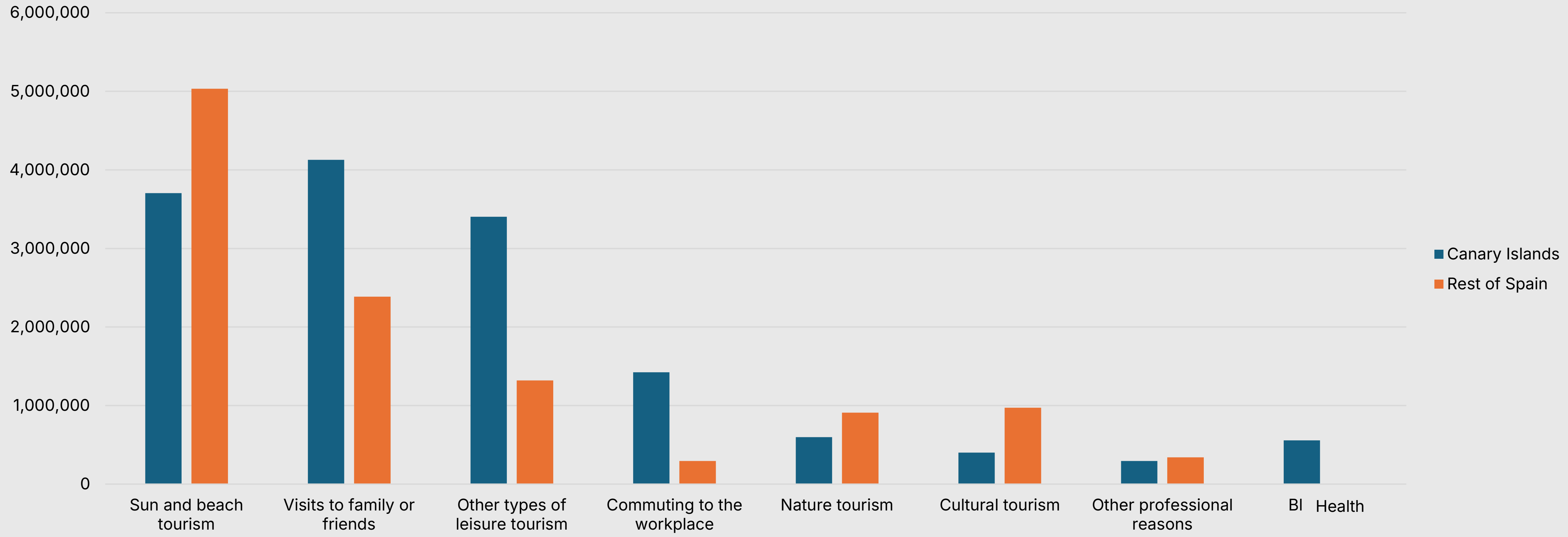
Visits by mainland Spain tourists to the Canary Islands relative to their region's population



Source: Measurement of tourism from mobile phones (INE Experimental Statistics) and Continuous Population Statistics (INE)

Among the main reasons for Canary Island residents to spend overnight stays within the Canary Islands in 2023, visiting friends or relatives was the most common, accounting for over 4 million overnight stays. Other notable reasons included sun and beach tourism, as well as other leisure-related travel. In contrast, for tourists from mainland Spain, the top two reasons were reversed: sun and beach tourism ranked first with over five million overnight stays, followed by visits to friends or relatives. It is also worth noting that mainland tourists showed a greater interest in cultural and nature-based tourism.

Overnight stays in the Canary Islands by tourists residing in the Canary Islands and the rest of Spain according to the main reason for travel and place of residence in 2023



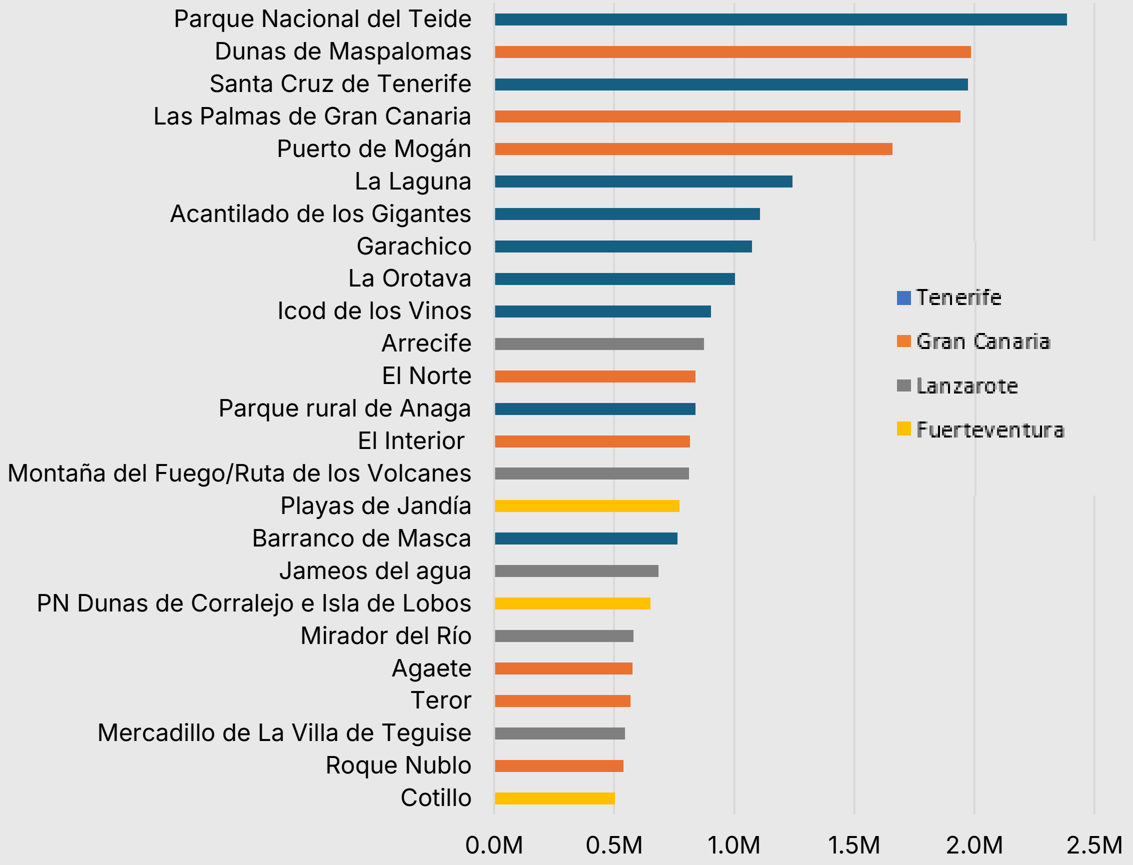
Note: Data for 2024 are not available at the time of writing. Source: Resident Tourism Survey (INE)

Places visited

Nearly 2.5 million tourists visited Teide National Park in Tenerife in 2024, consolidating its position as the most visited site in the Canary Islands. In second place were the Maspalomas Dunes in Gran Canaria, with nearly two million visitors.
They were followed by the capitals of Tenerife and Gran Canaria, which also approached two million visitors in 2024.

In Lanzarote, the most visited sites were Arrecife and the Volcano Route, while in Fuerteventura, the highlights were the Jandía Beaches and the Corralejo Dunes National Park and Lobos Island. The variety of these destinations reflects the archipelago's diverse landscapes and tourism offer, providing experiences that range from beaches and dunes to volcanoes and historic cities.

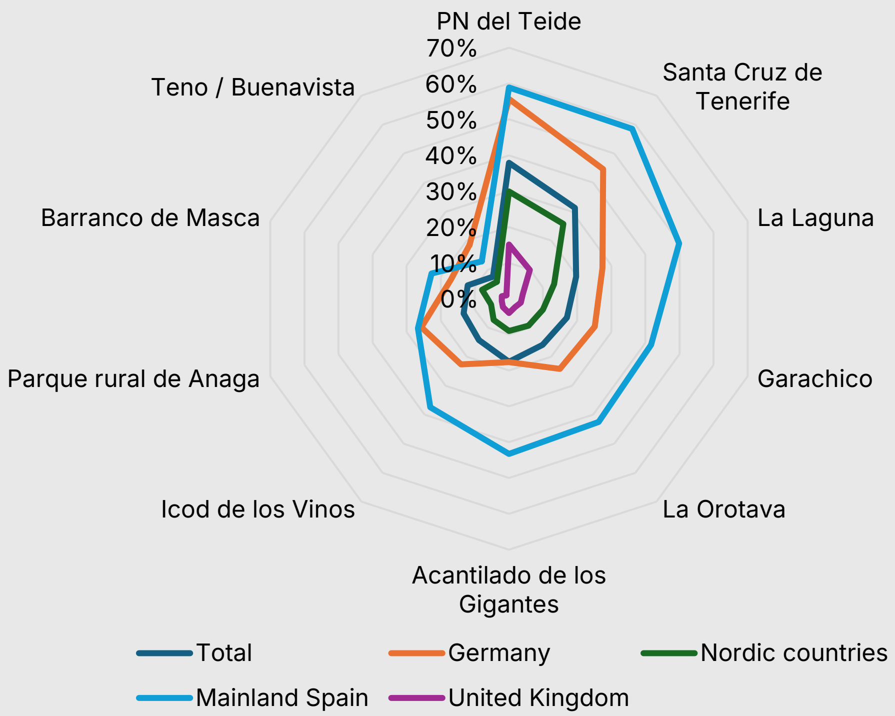
Places in the Canary Islands most visited by tourists (mainland Spain and foreign) in 2024



Source: Survey on Tourist Expenditure (ISTAC)

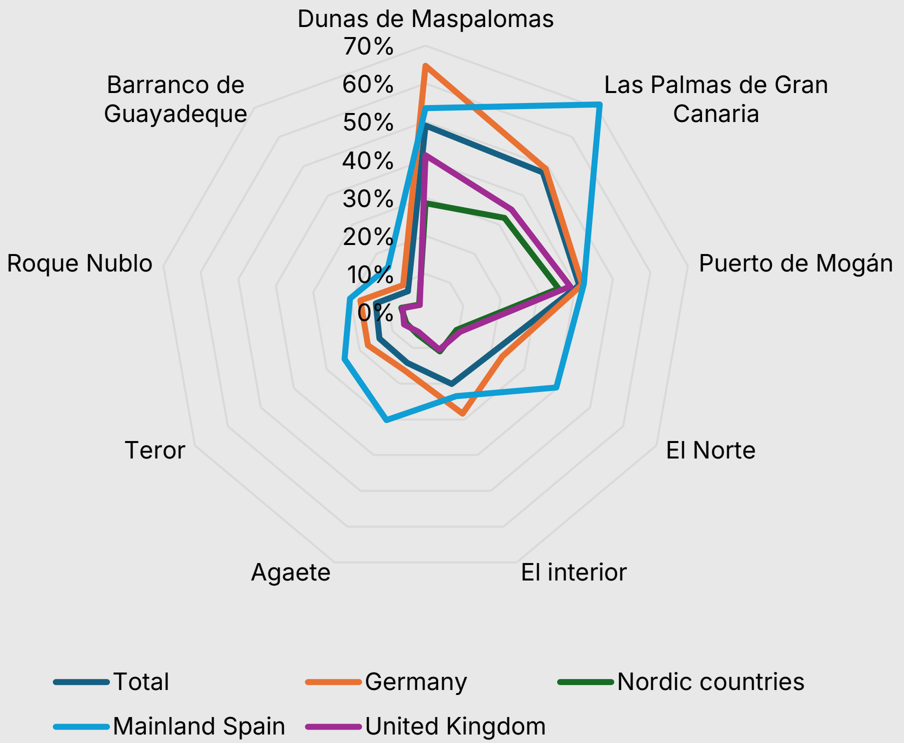
In both Tenerife and Gran Canaria, mainland Spanish tourists are the most likely to visit the islands' most iconic sites, followed by German tourists. Looking at each island individually, alongside their capitals, the most visited places in Tenerife are the Teide National Park and La Laguna, while in Gran Canaria, the Maspalomas Dunes and Puerto de Mogán stand out. Notably, Nordic and British tourists are the least likely to visit iconic sites, with visiting rates below the overall average.

Percentage of tourists who visit places in Tenerife over the total number of tourists who visit the island. 2024



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

Percentage of tourists who visit places in Gran Canaria out of the total number of tourists who visit the island. 2024

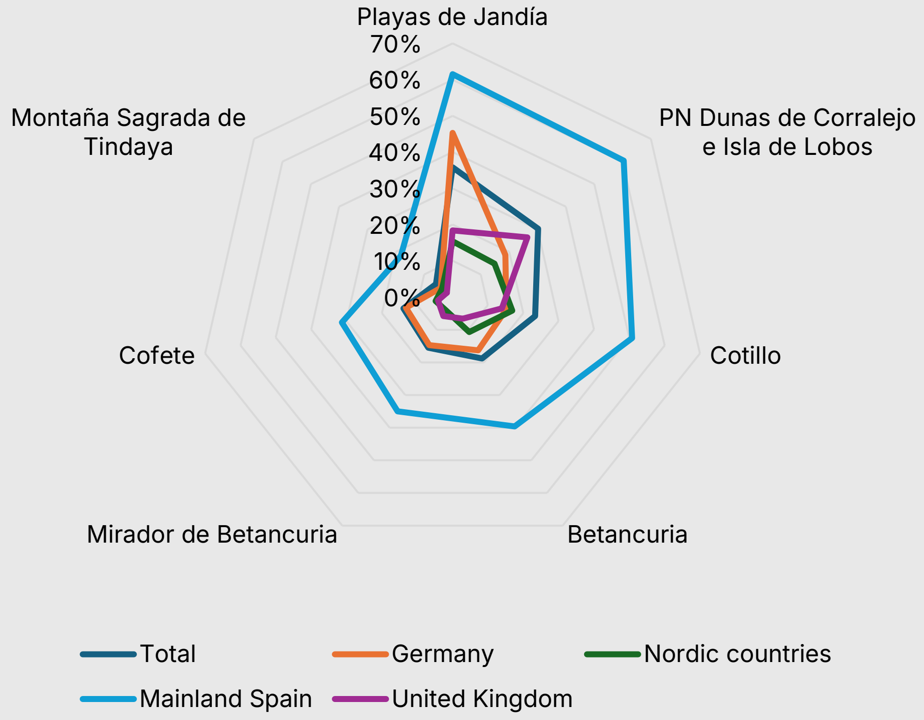


Source: Promotur, based on the Survey on Tourist Expenditure (ISTAC)

In Fuerteventura and Lanzarote, mainland Spanish tourists continue to be the most likely to visit iconic sites. However, in this case, German tourists fall below the average in terms of visits to points of interest in Fuerteventura.

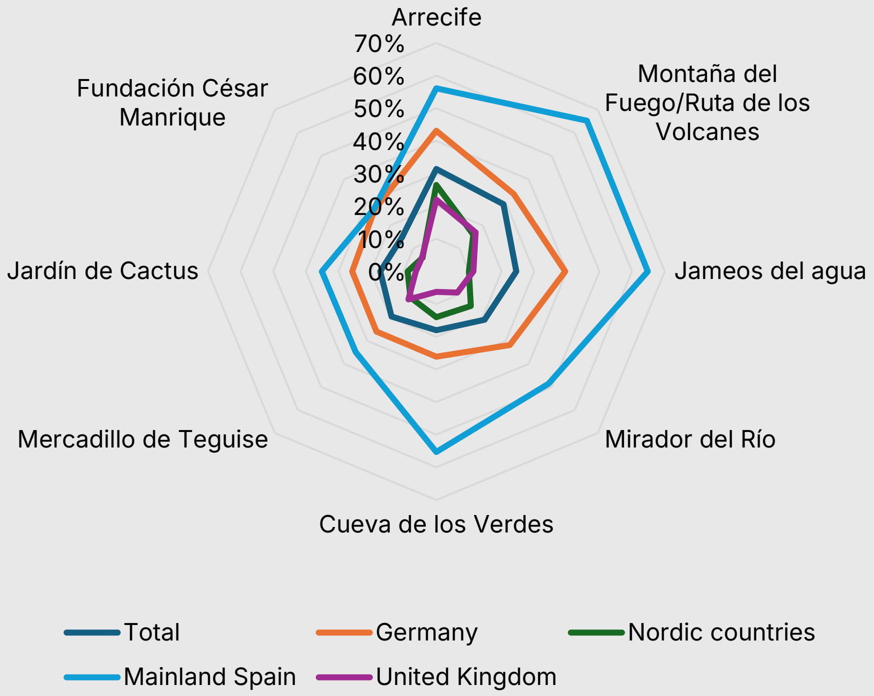
On the island of Fuerteventura, the most visited sites are the Jandía Beaches and the Corralejo Natural Park and Lobos Island. In Lanzarote, Arrecife and the Volcano Route stand out as the main points of interest.

Percentage of tourists who visit places in Fuerteventura over the total number of tourists who visit the island. 2024



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

Percentage of tourists who visit places in Lanzarote over the total number of tourists who visit the island. 2024

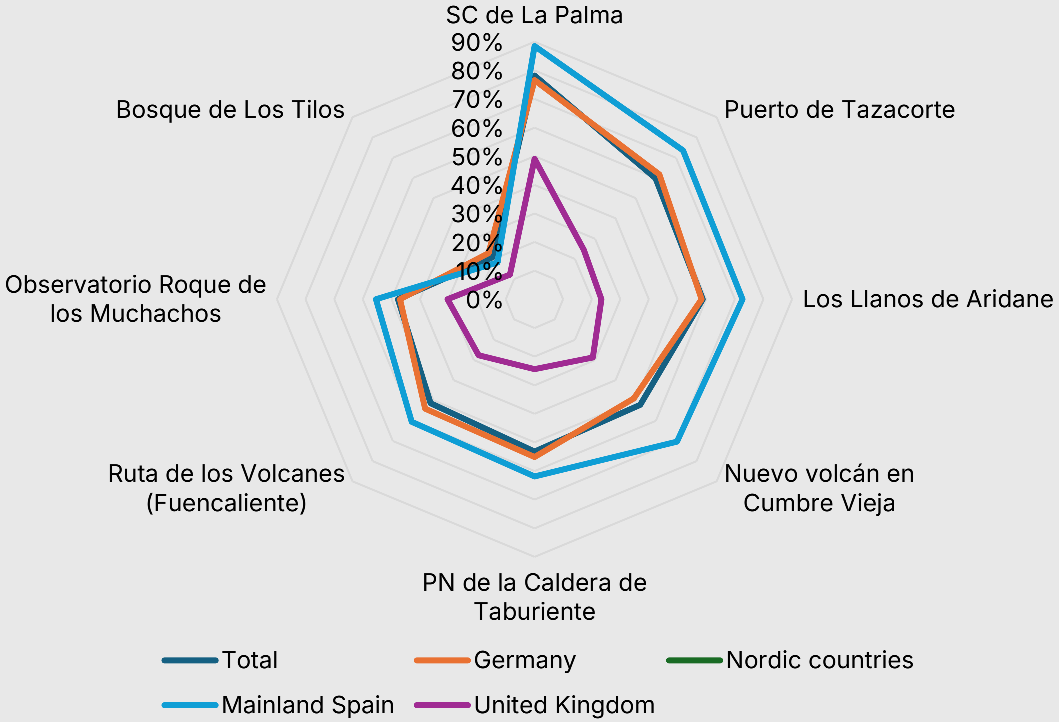


Source: Promotur, based on the Survey on Tourist Expenditure (ISTAC)

Among all the islands included in the Tourist Expenditure Survey, La Palma records the highest percentages of tourists visiting points of interest, with figures exceeding 50% in most cases. This highlights a different tourist profile on the island, characterised by more active visitors who do not limit themselves to staying within their accommodation.

As in the rest of the islands, British tourists are the least likely to visit the various sites in La Palma. Notably, there was a high number of visitors to the Cumbre Vieja volcano formed after the 2021 eruption.

Percentage of tourists who visit places on La Palma over the total number of tourists who visit the island. 2024

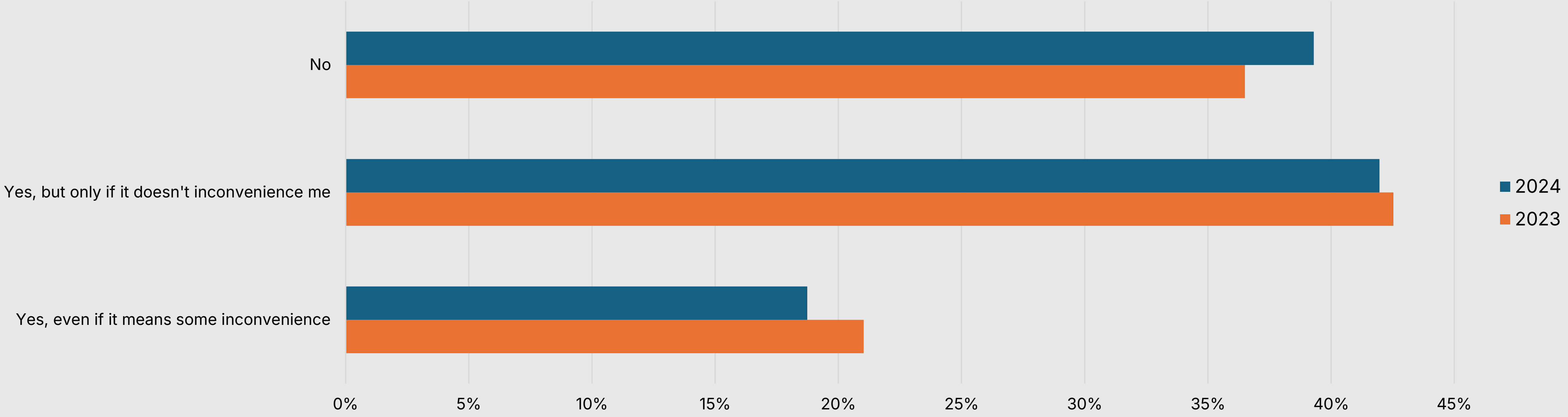


Source: Promotur, based on the Survey on Tourist Expenditure (ISTAC)

Tourist interest in more sustainable options

In 2024, 41.9% of tourists expressed their willingness to choose sustainable options, provided this did not involve any inconvenience. Meanwhile, 18.7% were willing to do so even if it entailed some difficulty. Lastly, 39.3% of respondents showed no interest in opting for sustainable alternatives.

Foreign and mainland tourists arriving in the Canary Islands according to their predisposition to choose more sustainable options when booking their trip in 2023 and the first quarter of 2024

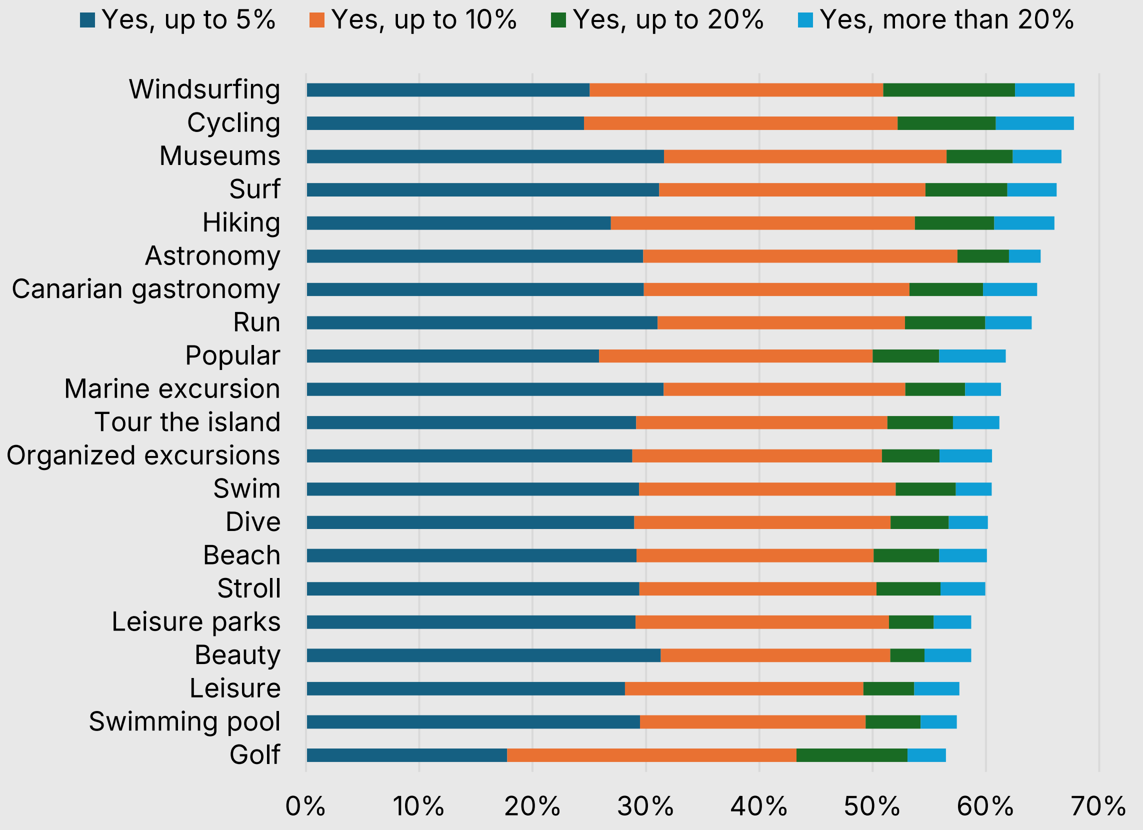


Note: Data published until the first quarter of 2024, the data for 2023 correspond to the whole year.
Source: Survey on Tourist Expenditure (ISTAC)

The chart illustrates travellers' willingness to spend more on their trips to reduce their carbon footprint. Tourists engaged in nature-based activities such as surfing, cycling and hiking, as well as those interested in museums, gastronomy and stargazing, show a greater willingness to accept an additional cost. Notably, many would be prepared to pay up to 5% or even 10% more.

However, a significant proportion of respondents are unwilling to incur extra expenses for sustainable options, particularly in leisure, beauty, pool and golf-related activities. It is worth highlighting that travellers are more inclined to accept additional costs for experiences involving closer contact with the natural environment and local culture.

Willingness on the part of tourists to spend more on their trip to reduce their carbon footprint according to the activities carried out. First quarter of 2024.



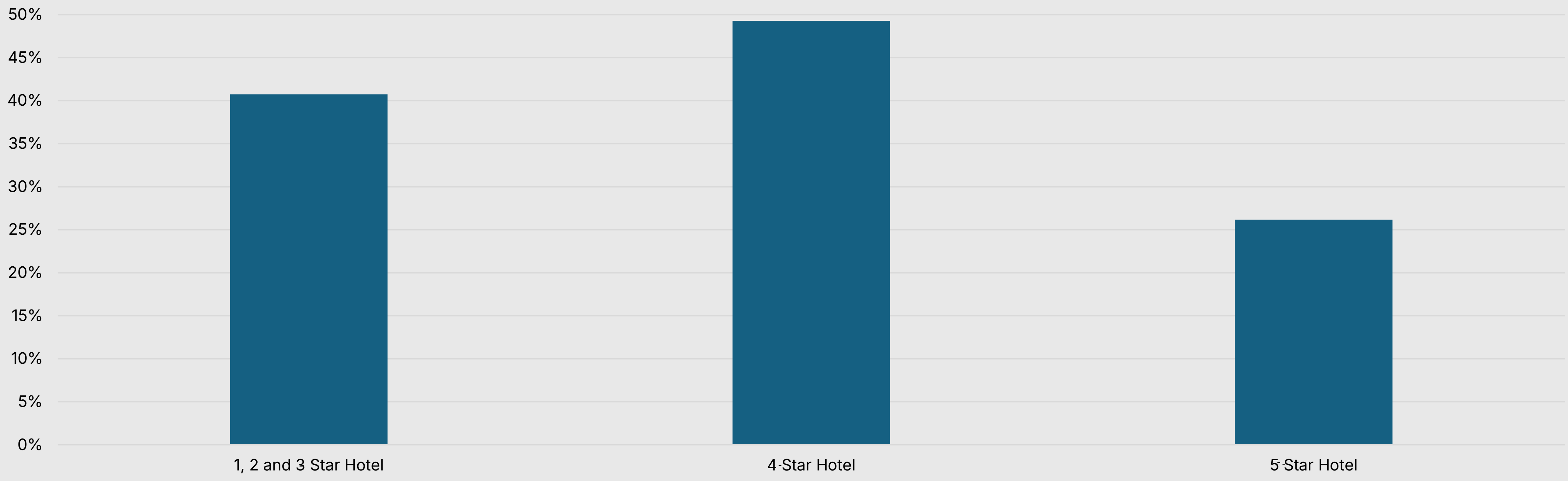
Source: Survey on Tourist Expenditure (ISTAC)

All-inclusive tourists

In hotels across the Canary Islands, the percentage of tourists choosing all-inclusive board is highest in 4-star establishments, where it reaches 49.3%.

This is followed by 1-, 2- and 3-star hotels, with 40.7%. Lastly, 5-star hotels record the lowest proportion of guests on an all-inclusive basis, at 26.2%.

Percentage of tourists staying on an all-inclusive basis for each type of hotel in the Canary Islands in 2024

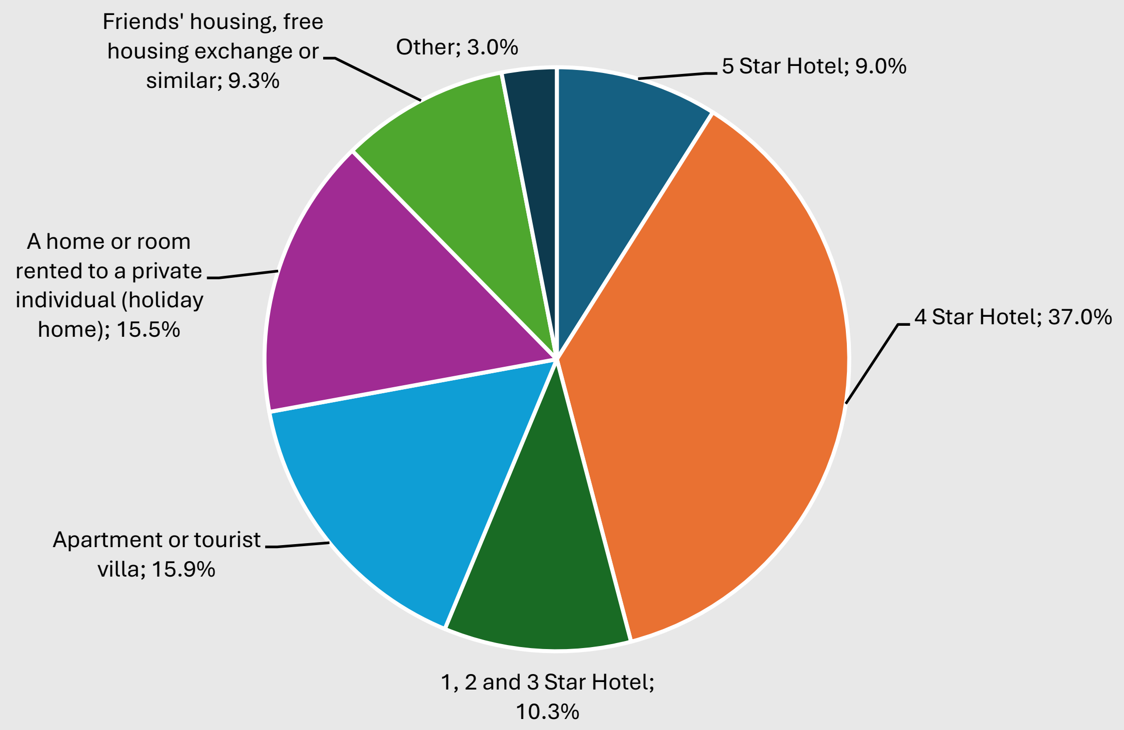


Source: Survey on Tourist Expenditure (ISTAC)

Distribution of tourists according to accommodation options

The most commonly chosen option by both foreign and mainland Spanish tourists visiting the Canary Islands is 4-star hotels, accounting for 37% of the total. This preference surpasses other types of accommodation, such as tourist apartments or villas (15.9%), holiday rentals (15.5%) and 1-, 2- and 3-star hotels (10.3%). It is also worth noting the share of 5-star hotels, which receive 9% of tourists, and stays with relatives or friends, or in free accommodation, which account for 9.3%.

Distribution of tourists arriving in the Canary Islands according to type of accommodation chosen in 2024

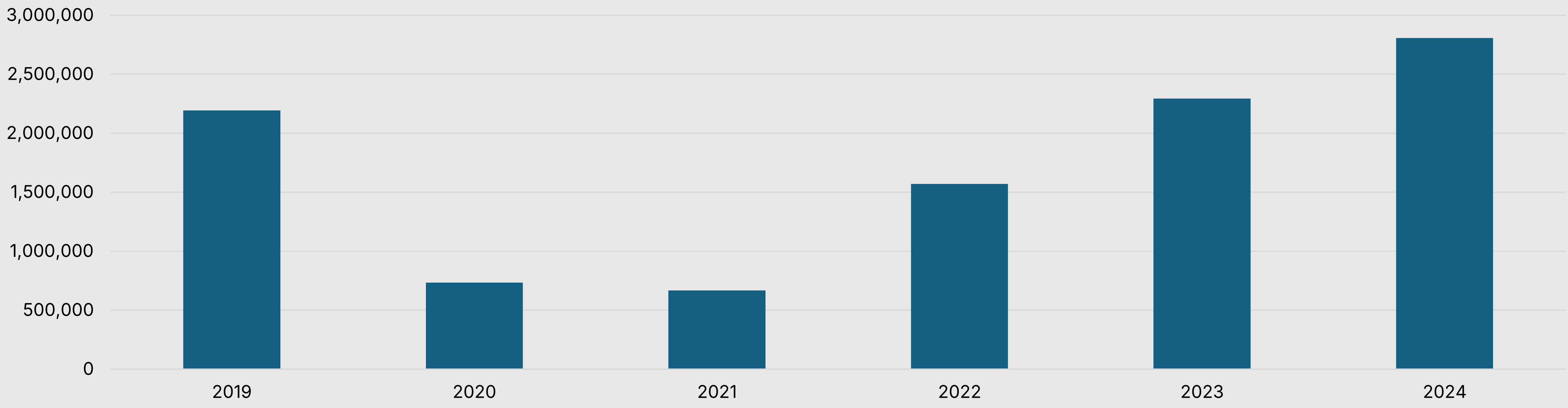


Note: Includes tourist from mainland Spain and foreigners. Source: Survey on Tourist Expenditure (ISTAC)

Cruise Statistics

The annual number of cruise passengers arriving at state-owned ports of the Canary Islands between 2019 and 2024 experienced a sharp decline in 2020 and 2021 due to the COVID-19 pandemic. However, from 2022 onwards, a notable recovery is observed, with steady growth leading to 2024 figures surpassing those of 2019, thus exceeding pre-pandemic levels. This rebound highlights the resilience and dynamism of the cruise sector in the Canary Islands, as well as its capacity to adapt and strengthen in the aftermath of the health crisis.

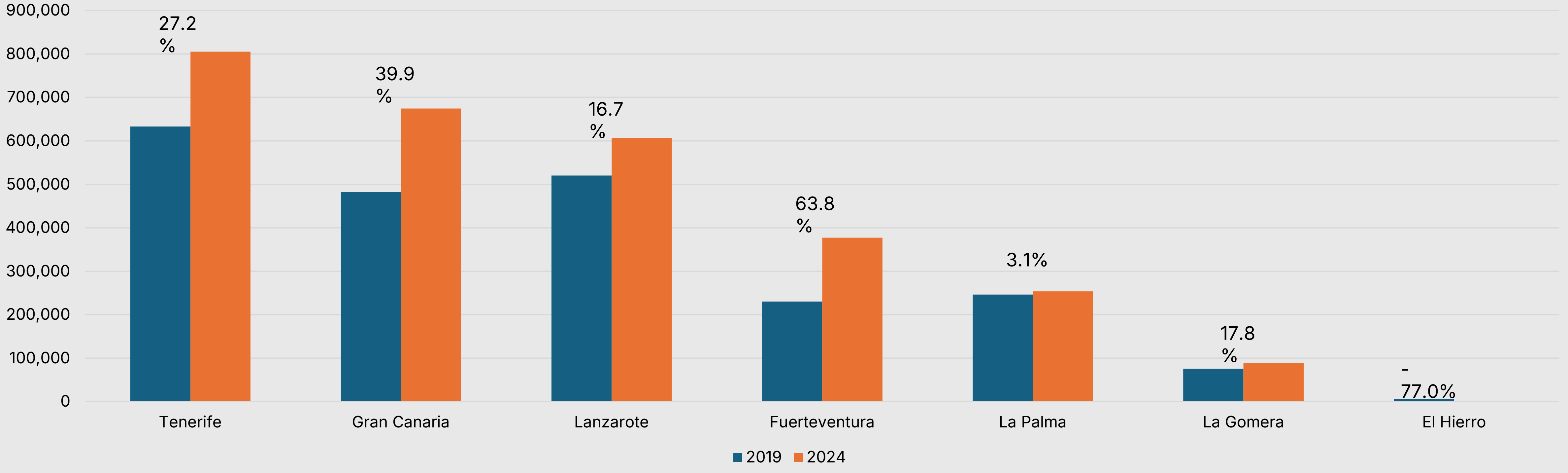
Annual cruise passengers arriving at state-owned ports in the Canary Islands



Note: The data includes both cruise passengers who end their journey in the state-owned ports of the Canary Islands and those who make a stopover. Source: Port Authority of Santa Cruz de Tenerife and Port Authority of Las Palmas

Looking at the evolution of cruise passenger arrivals to the different Canary Islands between 2019 and 2024, a general increase is observed, with notable growth in Fuerteventura (63.8%), Gran Canaria (39.9%) and Tenerife (27.2%). In Lanzarote and La Gomera, the increase is around 17%, while in La Palma it is more moderate. In contrast, El Hierro records a sharp decline, although this occurs within a context of significantly lower overall arrival volumes.

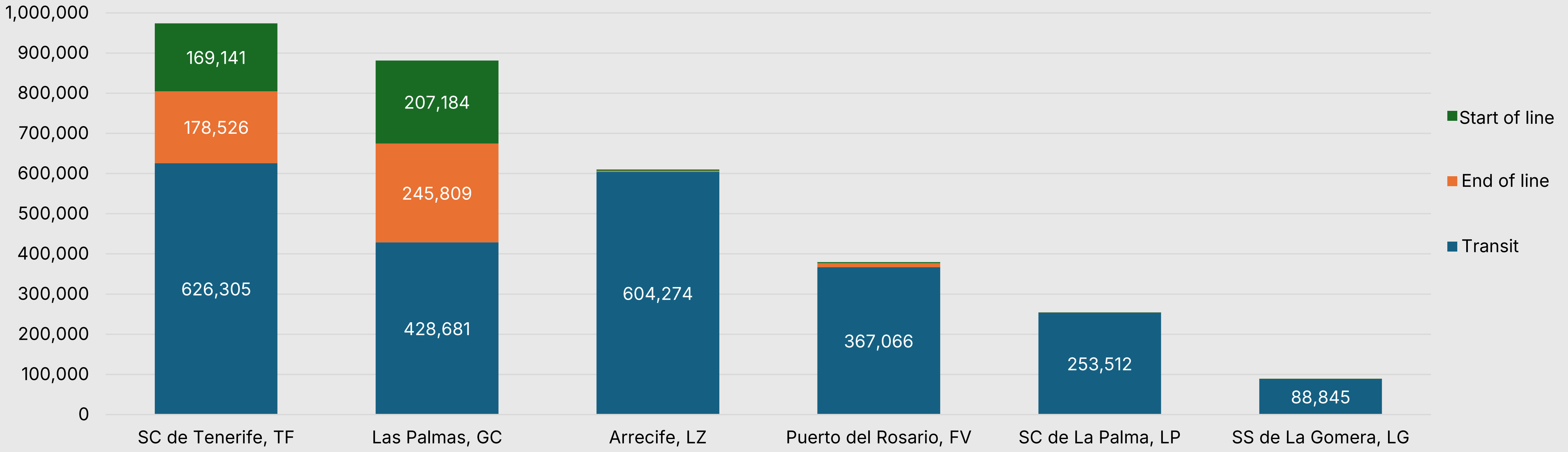
Cruise passengers arriving at state-owned ports of the Canary Islands in 2019, 2024 and variation (%)



Note: The data includes both cruise passengers who end their journey in the ports of the State of the Canary Islands and those who are in transit. Source: Port Authority of Santa Cruz de Tenerife and Port Authority of Las Palmas

Most cruise passengers visiting the Canary Islands do so in transit, having started their routes at ports outside the archipelago. However, a significant proportion of cruise passengers at the ports of Las Palmas and Santa Cruz de Tenerife begin or end their journey at these destinations. In this regard, Las Palmas has established itself as the leading port in the Canary Islands for cruise departures and arrivals, with 54.2% and 56.2% of cruise passengers starting and ending their routes in the archipelago, respectively. Tenerife ranks second, with 44.2% of cruise passengers starting and 40.8% ending their journey there. Additionally, the port of Arrecife stands out as the second busiest cruise transit port in the Canary Islands.

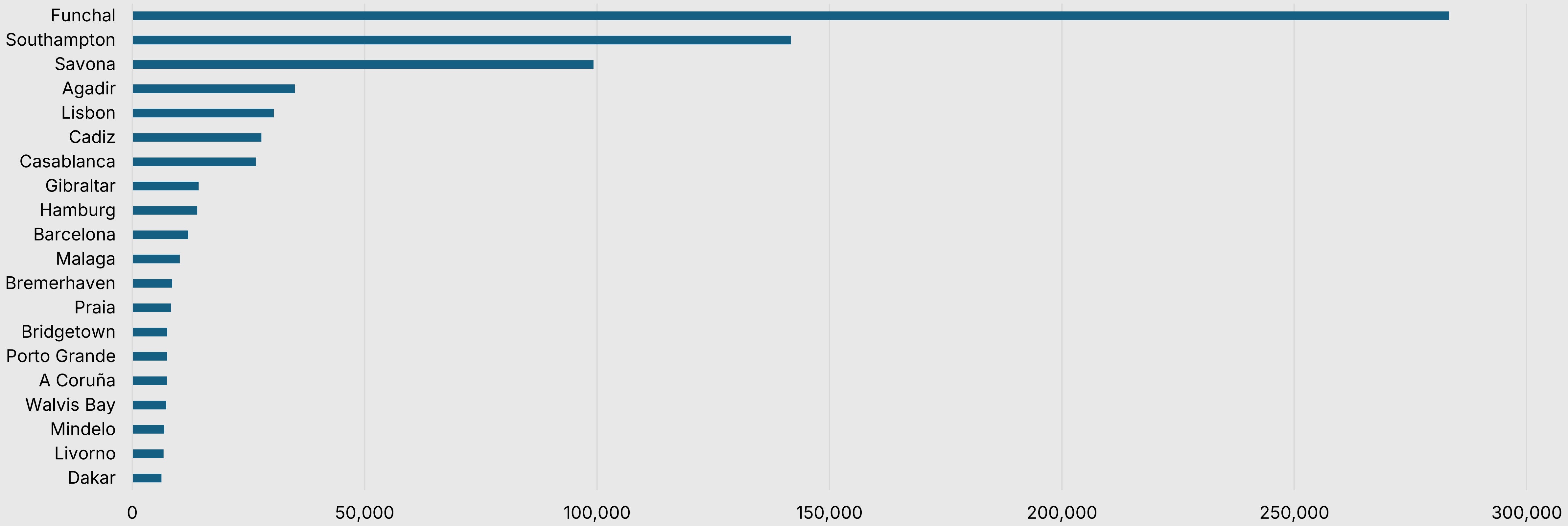
Cruise passengers starting/ending lines or transit at the different state-owned ports of the Canary Islands in 2024



Note: The ports of La Estaca (El Hierro) and Los Cristianos (Tenerife) have been omitted with 1,449 and 336 passengers in transit, respectively. LP, La Palma; LG, La Gomera; TF, Tenerife; GC, Gran Canaria; FV, Fuerteventura; LZ, Lanzarote. Source: Port Authority of Santa Cruz de Tenerife and Port Authority of Las Palmas

An analysis of the ports of origin of cruise passengers transiting through the Canary Islands reveals that the vast majority come from Funchal, Southampton and Savona, consolidating these ports as strategic hubs on cruise routes to the archipelago. They are followed by Agadir, Lisbon, Cádiz and Casablanca, highlighting the strong connection between the Canary Islands and both the Atlantic and Mediterranean regions.

Ports of origin outside the Canary Islands for cruise passengers calling at state-owned ports of the Canary Islands in 2024



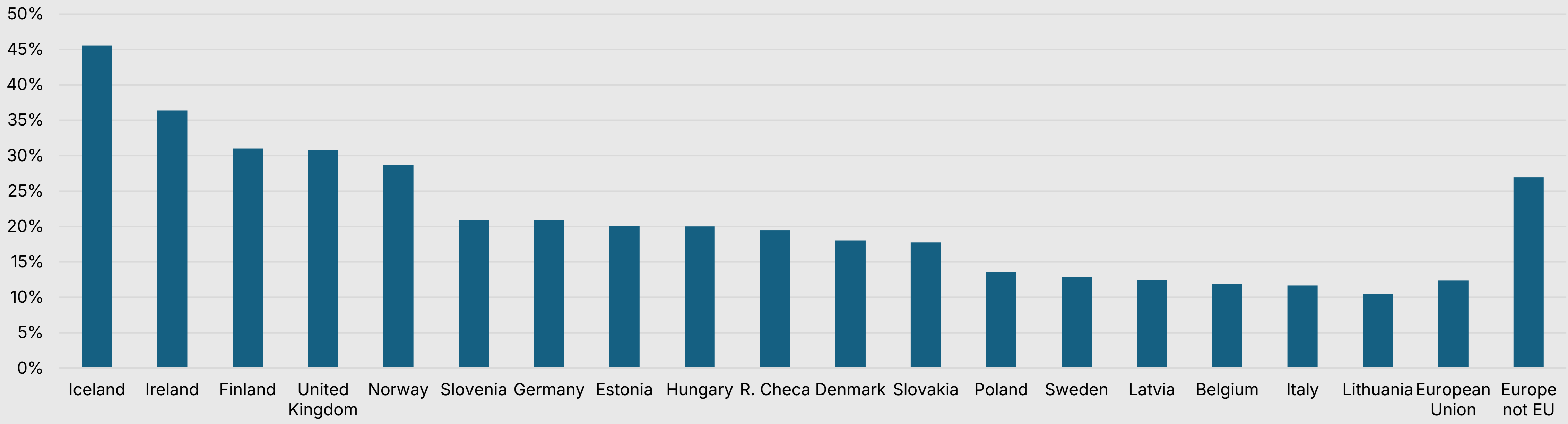
Source: Port Authority of Santa Cruz de Tenerife and Port Authority of Las Palmas

Attractiveness of the Canary Islands and its municipalities

The Canary Islands' share of tourist arrivals to Spain shows a strong presence of visitors from specific European markets, particularly Iceland, Ireland, Finland and the United Kingdom, where over 30% of tourists travelling to Spain choose the archipelago as their destination. This high proportion highlights the importance of air connectivity and the loyalty of traditional source markets.

However, the dependence on certain markets also underscores the need to diversify demand and explore opportunities in countries with lower relative representation. Promoting the destination in markets with smaller shares could help mitigate the risks associated with an excessive concentration of tourists from specific countries.

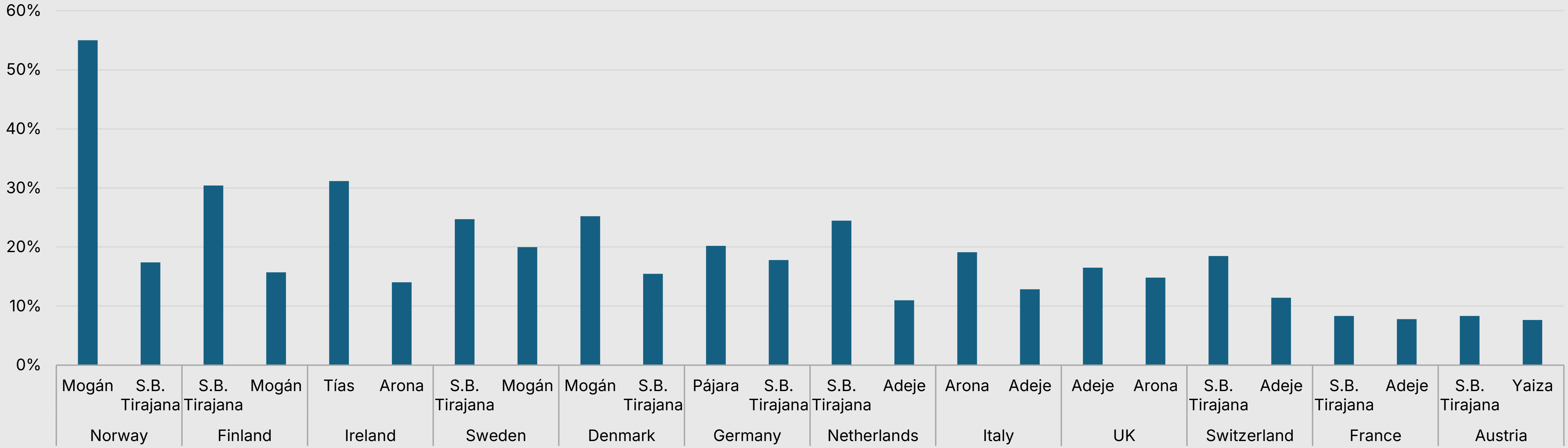
Share of the Canary Islands in tourist arrivals to Spain for the main European countries in 2024



Note: Only countries with a share greater than 10% in the Canary Islands compared to Spain are included.
Source: INE. Analysis of Tourism by Mobile Position

The concentration of tourists from various origins in specific municipalities is a defining feature of tourism in the Canary Islands. Norway stands out for its high concentration in Mogán, where over 50% of its tourists stay, suggesting strong loyalty to this particular destination. Similarly, tourists from Finland and Ireland show a marked preference for San Bartolomé de Tirajana and Tías, respectively, establishing these municipalities as key attractions for certain markets. German and British tourists, two of the Canary Islands' main historical source markets, display a more diversified distribution, although Germans are notably present in Pájara and San Bartolomé de Tirajana, while British tourists are concentrated in Adeje and Arona. In contrast, emerging or lower-volume markets such as France, Austria and Switzerland show less concentration in specific destinations, which may reflect more varied travel patterns or a lower prevalence of structured package tourism in these markets.

Municipal concentration of tourist arrivals to the Canary Islands by country of residence in 2024

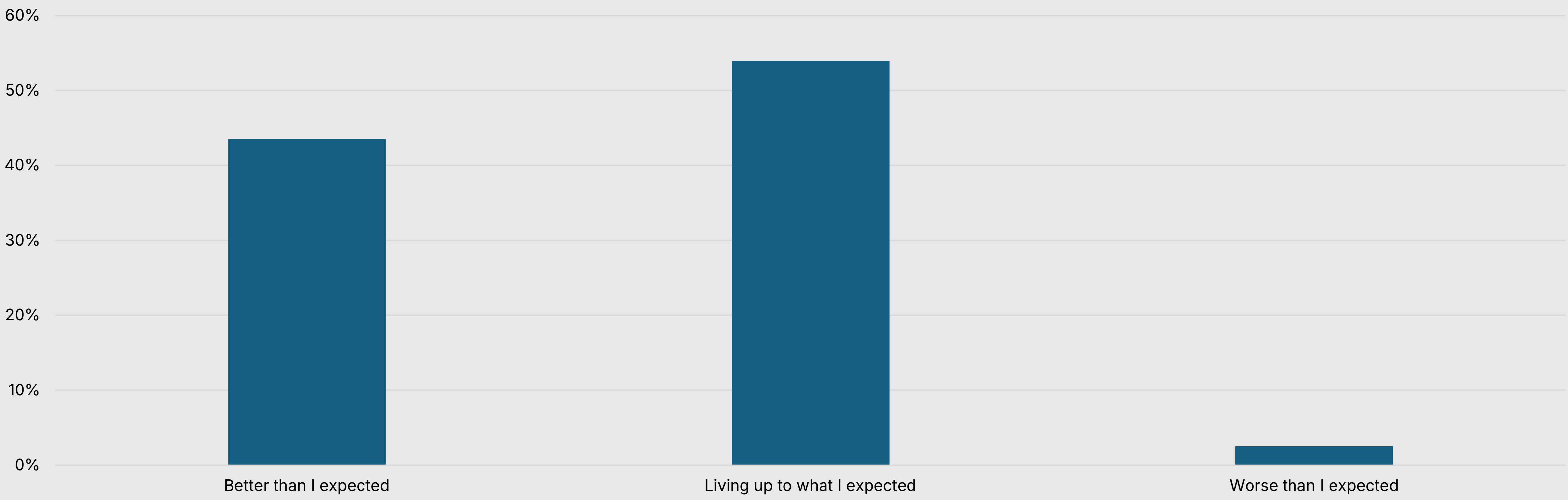


Note: The countries for which the Canary Islands received more than 100,000 tourists have been included
Source: INE. Analysis of tourism according to mobile position

Tourist satisfaction

The majority of foreign and mainland Spanish tourists in 2024, specifically 54.8%, rated their experience as "in line with expectations." A significant proportion, 42.3%, considered it "better than expected," while only a small percentage, 2.9%, stated it was "worse than expected."

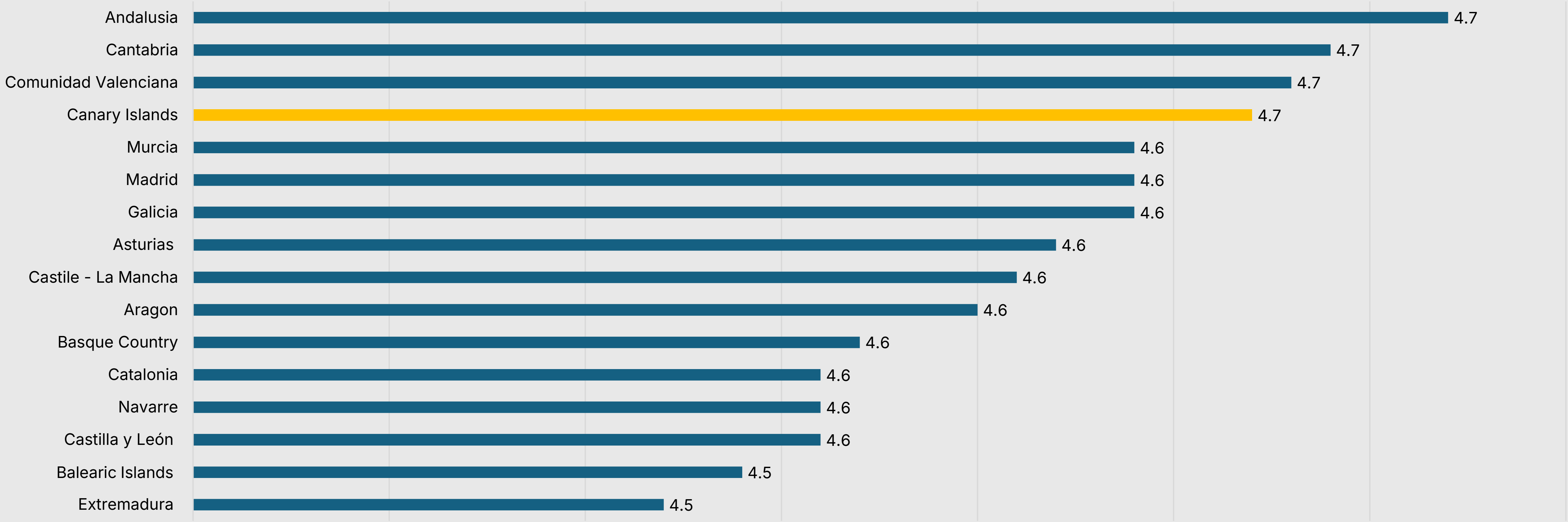
Distribution of tourists according to their rating of the experience in the Canary Islands in 2024



Note: Includes foreign and mainland Spain tourists
Source: Survey on Tourist Expenditure (ISTAC)

In 2024, the Canary Islands recorded a relatively high level of visitor satisfaction compared to other regions. A total of 70.3% of visitors rated their experience as "very satisfied," with an average score of 4.67 out of 5. It is worth noting, however, that differences between regions were small and all showed high satisfaction levels. This strong rating is supported not only by the quality of the tourism experience but also by a high level of prior familiarity with the destination, as most tourists already knew the Canary Islands and had a positive perception, which typically results in a high degree of satisfaction.5

Degree of satisfaction in the visit of international tourists by autonomous communities in 2024. Scale 1–5



Source: Satisfaction Survey of Non-Resident Travellers. Spanish Tourism Institute (Turespaña)

Destination attractiveness and tourist satisfaction

Indicator	Description	Availability	Fountain	Remarks
Overall tourist satisfaction	The overall satisfaction of tourists referring to the entire experience.	Available	Tourist Expenditure Survey (ISTAC)	
Tourist satisfaction with nature, culture, sport and leisure activities	This indicator includes the satisfaction of tourists with some main components of the tourist experience.	Unavailable		There are occasional studies such as that of Promotur (2023) that analyse ratings of experiences on Tripadvisor.
Predisposition of tourists to choose more sustainable options when booking the trip according to activity carried out at destination/willingness to spend to reduce carbon footprint according to activities.		Available	Tourist Expenditure Survey (ISTAC)	
Supply and demand for nature, culture, sports and leisure activities, as well as events	The identification of the tourist's activities within the destination that result in unique tourist experiences.	Partially available	Tourist Expenditure Survey (ISTAC)	There are occasional studies such as that of Promotur (2023) that analyse ratings of experiences on Tripadvisor. There is data on authorized companies (the most recent list is from September 2022); but there is no regular data on the activity of these companies.

4.2

Tourism seasonality

Introduction

Seasonality is defined as the concentration of tourism activity during certain time periods due to fluctuations in demand over the considered period, typically a calendar year. It is one of the variables that most affects the profitability of tourism businesses, as the investment in the required capacity for business operations results in low utilization of productive assets during low demand periods. This leads to fixed costs that are not covered by revenue, negatively impacting the overall performance during the period considered.

As a destination, the Canary Islands benefit from relatively low seasonality in general tourism activity, considering all markets of origin. This is similar to high-demand city destinations like Ile-de-France and Madrid, and lower than all competing sun-and-beach destinations in Europe.

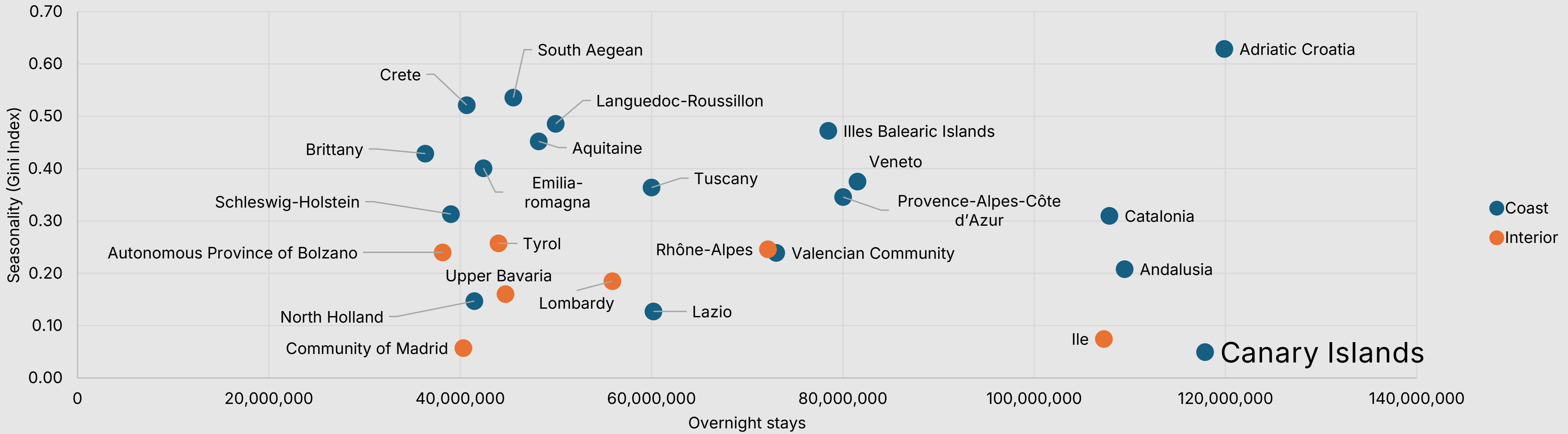
However, although the Canary Islands enjoy relatively low overall seasonality, there are differences when examining seasonality indicators by market of origin, tourist hubs, or micro-destinations. Markets such as the United Kingdom and Germany, which account for more than 50% of the overnight stays and visits to the archipelago, experience low seasonality. In contrast, the Nordic markets (Sweden, Norway, Denmark, and Finland) exhibit high seasonality, concentrated mainly in the winter months.
Regarding micro-destinations, the islands of El Hierro, La Gomera, and La Palma show higher seasonality than the Canary Islands' average. Furthermore, the cruise tourism segment experiences high seasonality, with its concentration in the cruise season months.

This chapter also presents an analysis of seasonality according to various tourism demand and supply indicators. The analysis shows that seasonality, as measured by indicators like the number of tourists and tourism expenditure, is higher than by indicators such as overnight stays and accommodation capacity. Additionally, the apartment accommodation segment displays more seasonality than the hotel segment.

Seasonality in the European Union

In 2023, with 118 million overnight stays across all tourist establishments (including vacation rentals), the Canary Islands ranked as the second region in the European Union with the highest number of overnight stays, only slightly behind Jadranska Hrvatska (Croatia). Additionally, the archipelago stands out as the European region with the lowest seasonality, with a Gini Index of 0.050 in the distribution of its overnight stays throughout the year. This index, which ranges from 0 (no seasonality) to 1 (maximum seasonality), reflects that overnight stays in the Canary Islands remain stable throughout the year. In contrast, Jadranska Hrvatska concentrates 86% of its overnight stays between June and September, demonstrating a strong seasonality. While other regions like Île-de-France and the Community of Madrid also present seasonality indices below 0.10, the Canary Islands is the only coastal destination among the major tourist regions in the European Union that maintains a balanced distribution of overnight stays throughout the year.

25 European regions (NUTS-2) with the most overnight stays (resident and international tourists) in 2023



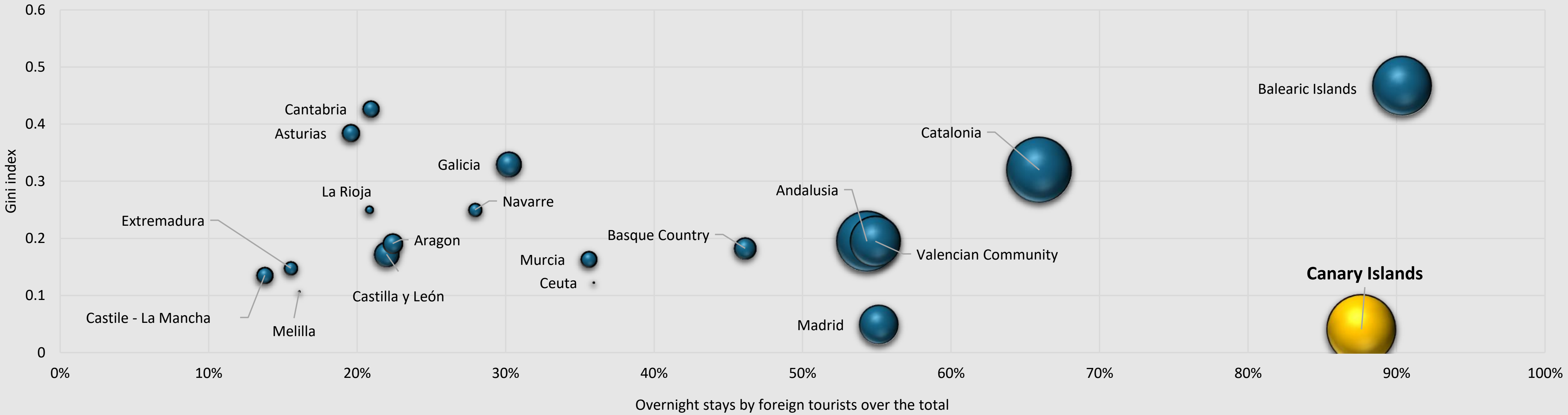
Note: The Gini Index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Overnight stays in tourist establishments, including short term rentals (experimental). Eurostat

Seasonality in the autonomous communities

According to the overnight stay data in tourist establishments from the INE for 2024, the Canary Islands stands as the autonomous community with the lowest seasonal concentration (Gini Index of 0.041), with 88% of overnight stays from international tourists. In contrast, the Balearic Islands, also with a very high percentage of international overnight stays (90%), shows the highest seasonality, with a Gini Index of 0.467. Together, both archipelagos account for 35% of the total overnight stays in Spain.

Catalonia, the autonomous community with the second highest total number of overnight stays, also exhibits high seasonality (0.320), with a predominance of foreign tourist overnight stays. Andalusia and Valencia (third and fifth in total overnight stays, respectively) have medium values in both indicators. Madrid, on the other hand, stands out for its low seasonal concentration, being the second region with the lowest Gini Index, just behind the Canary Islands.

Overnight stays in tourist establishments by Autonomous Communities (2024): seasonality, weight of foreigners and volume

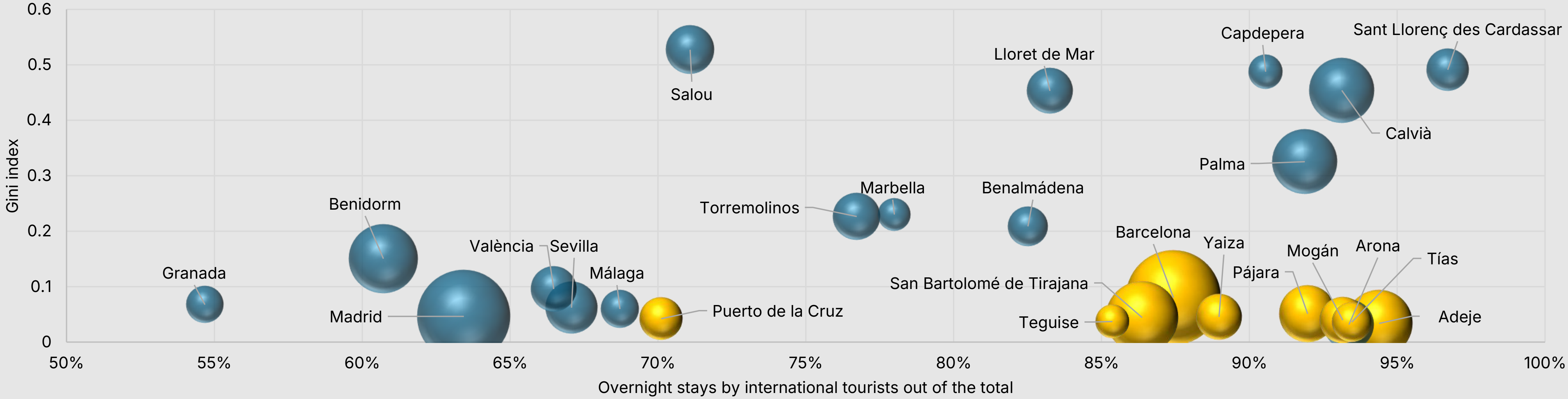


Notes: The bubble area represents overnight stays in hotels. The Gini Index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Employment Survey (INE)

The seasonality of municipalities in Spain

The Canary Islands have 9 of the 25 Spanish tourist municipalities with the highest number of hotel overnight stays in 2024. These municipalities account for 76.1% of the total hotel overnight stays in the country during that year. The municipalities in the Canary Islands show low seasonal concentration, with Gini Index values below 0.1 in all cases (the index ranges from 0, indicating no seasonality, to 1, indicating maximum seasonality), reflecting a stable distribution of overnight stays throughout the year. However, significant differences are observed in the weight of international overnight stays relative to the total. The municipalities of Adeje, Tías, Arona, Mogán, and Pájara register more than 90% of overnight stays from international tourists; Yaiza, San Bartolomé de Tirajana, and Teguise have slightly lower percentages, while Puerto de la Cruz stands out for having the lowest percentage of international overnight stays (70%). Regarding the rest of the municipalities, except for a few exceptions, there is a correlation between a higher proportion of international tourists and greater seasonality.

Hotel overnight stays in Spain's main tourist municipalities (2024): seasonality, weight of foreigners and number of overnight stays



Notes: The bubble area represents overnight stays in hotels. The Gini Index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Employment Survey (INE)

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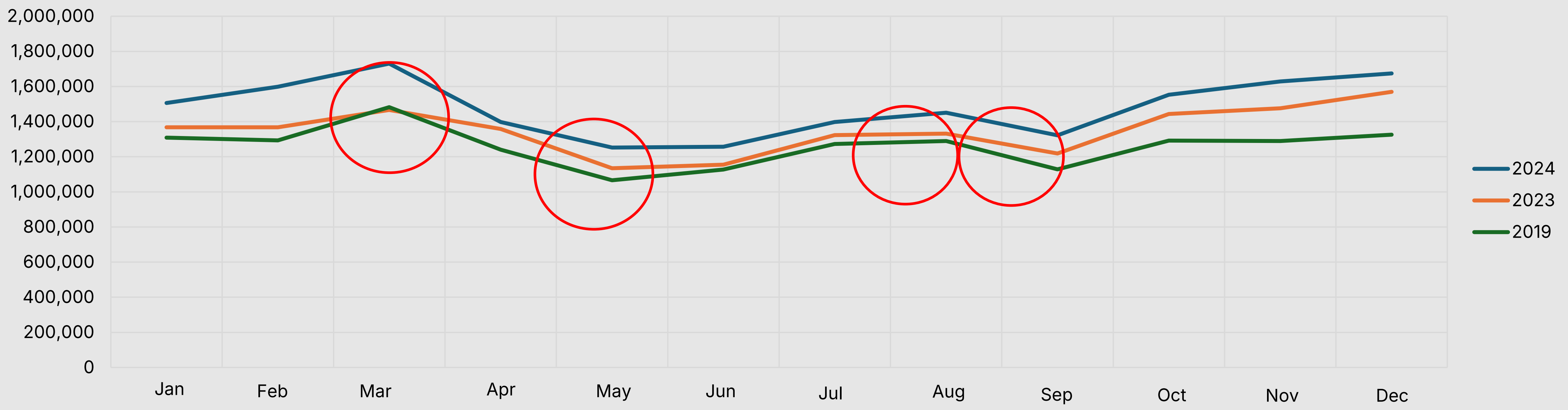
Seasonality in the Canary Islands

The arrival of international and mainland tourists to the Canary Islands by air shows notable stability throughout the year, according to FRONTUR-Canarias (ISTAC) data for the years 2019, 2023, and 2024. While the total number of tourists increased in 2023 and 2024 compared to 2019, which is considered the reference year before the pandemic, the seasonal pattern has remained almost unchanged in these three periods. The flow of tourists shows an increase from January to March, reaching its annual peak in the latter month. Afterward, there is a decline that reaches its lowest point in May. From that point onward, a sustained recovery begins, peaking again in August, followed by a slight drop in September. Finally, the year concludes with a gradual recovery during the last months, with a steady increase in tourist arrivals reaching levels comparable to those of the busiest months. Despite these slight fluctuations, the data confirm that, unlike many global tourist destinations, the Canary Islands are characterized by maintaining a steady flow of tourists throughout the year, with figures around 1.3 million arrivals per month.

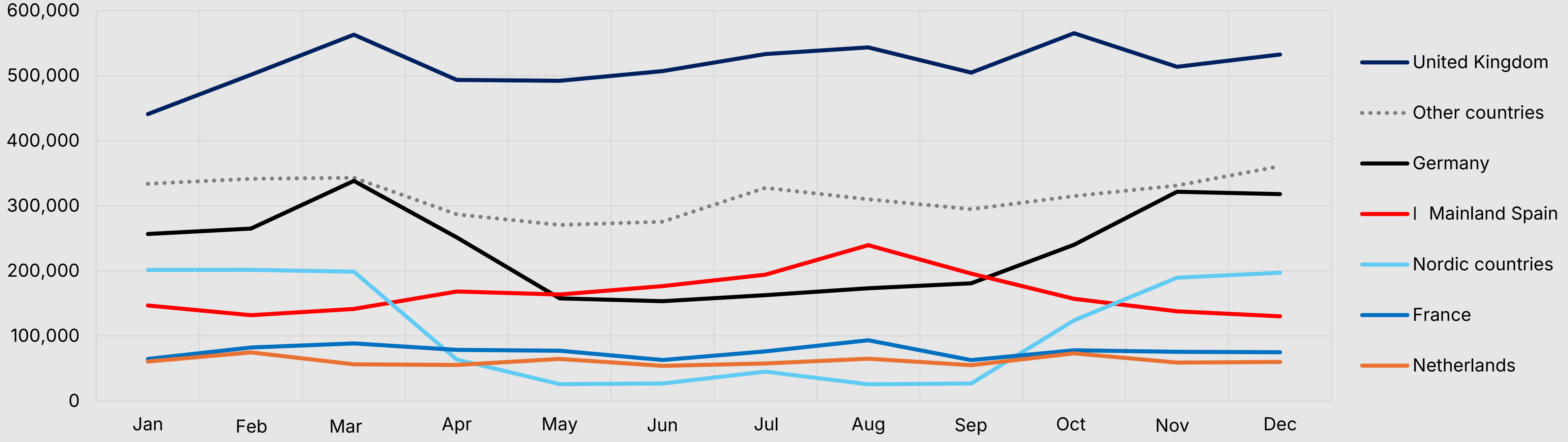
Arrival of tourists to the Canary Islands (international and mainland tourists)



Source: FRONTUR-Canarias (ISTAC)

While the arrival of tourists to the Canary Islands by air shows notable stability throughout the year, FRONTUR-Canarias (ISTAC) data for 2024 reveals that this absence of overall seasonality is due to the compensation between the different seasonal patterns of the main source markets, resulting in a uniform distribution of tourist flow. The United Kingdom, the main source market, maintains relatively stable values, with an average of around 500,000 tourists per month. In contrast, Germany exhibits a more seasonal pattern, characterized by peaks during the first and last quarters of the year, and significant drops during the second and third quarters. Tourists from mainland Spain show a strong concentration in the summer months, while the Nordic countries stand out for their high seasonality, with peaks in the first and last months of the year. This latter market displays the highest seasonal concentration among all those analysed. France and the Netherlands, smaller markets, exhibit relative stability, although with differentiated patterns. Finally, the arrival of tourists from other countries shows notable overall stability, with a slight decline during the third quarter.

Seasonality patterns of the main countries of origin (Canary Islands, 2024)



Source: FRONTUR-Canarias (ISTAC)

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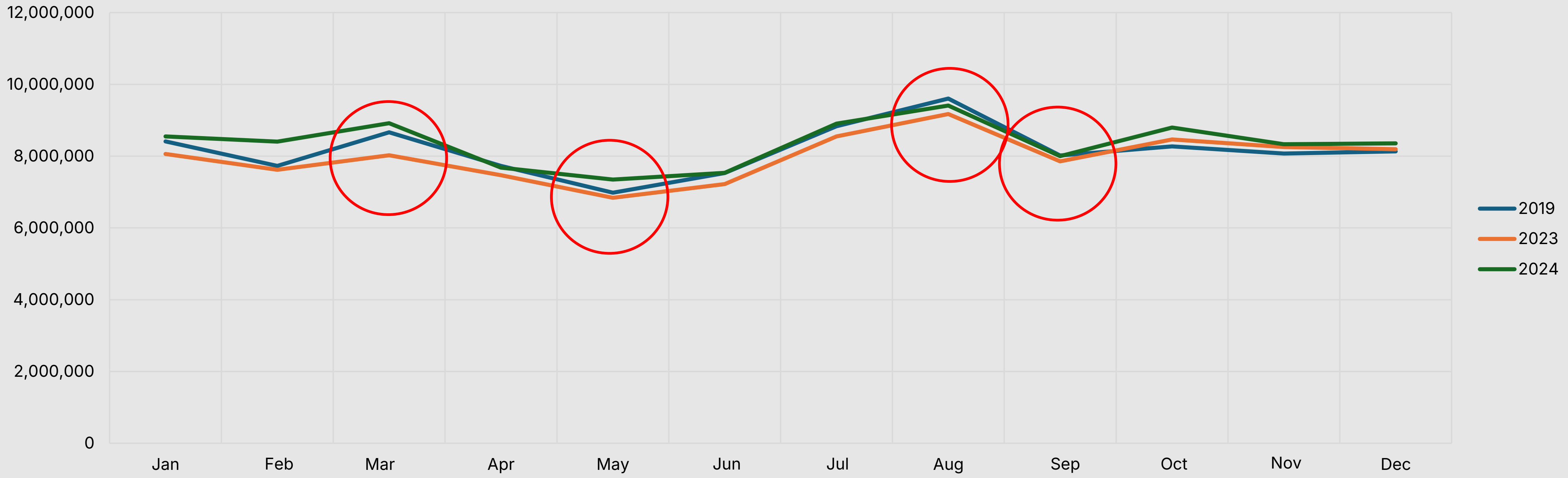
The data from the Tourist Accommodation Survey (ISTAC) on overnight stays in hotels and apartments by international tourists, mainland Spanish tourists, and Canary Island residents for the years 2019, 2023, and 2024 show notable stability throughout the year. The monthly values remain around 8 million overnight stays. The pattern is very similar in all three analysed years, with slight seasonal fluctuations. These fluctuations are reflected in peaks during March and August, followed by declines in the subsequent months. However, these variations do not alter the overall stability of the indicator.

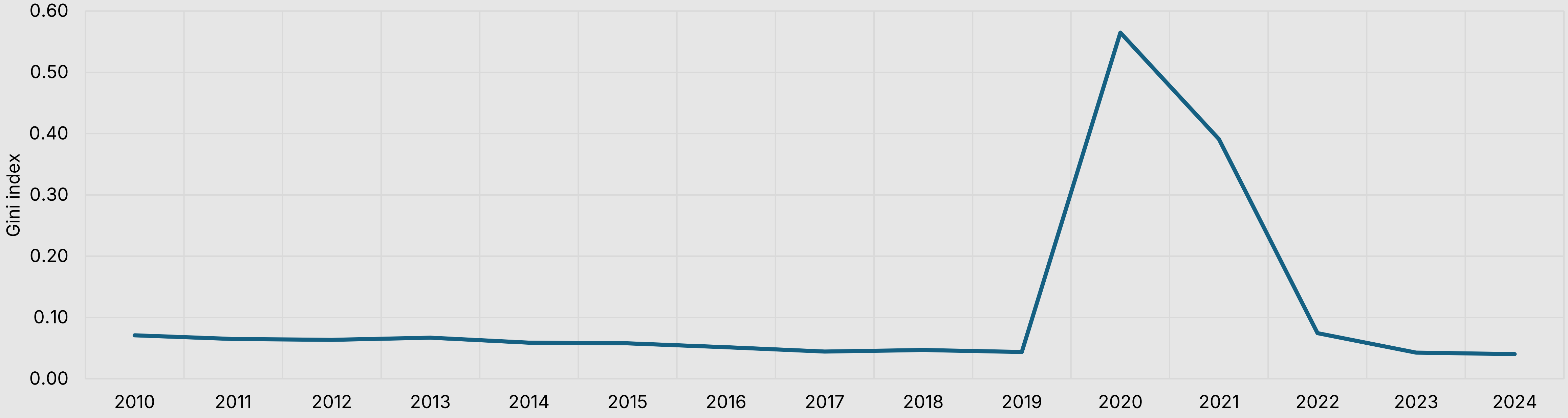
Overnight stays in hotels and apartments in the Canary Islands (international tourists, mainland tourists and Canary Island residents)



Source: FRONTUR-Canarias (ISTAC)

The Gini Index is a statistic that measures concentration, where 0 represents a completely uniform distribution (absence of seasonality) and 1 indicates extreme concentration (maximum seasonality). When applied to the analysis of monthly overnight stays in tourist establishments (hotels and apartments) in the Canary Islands, based on data from the ISTAC Tourist Accommodation Survey, which includes international tourists, mainland Spanish tourists, and Canary Island residents, this index reveals a remarkably low seasonal concentration. Between 2010 and 2019, the index values consistently remained below 0.10, reflecting a uniform distribution of overnight stays throughout the year. However, in 2020, the COVID-19 pandemic caused a significant increase in the index, as the limited overnight stays that year were concentrated exclusively in the first quarter. Since 2021, the index began a progressive decline, returning to historically low values below 0.10 starting in 2022. In 2024, the lowest value in the entire historical series was recorded, reaching 0.040. This data indicates that the monthly overnight stays were exceptionally evenly distributed throughout the year, approaching a perfect distribution and reinforcing the idea that the Canary Islands is a non-seasonal tourist destination.

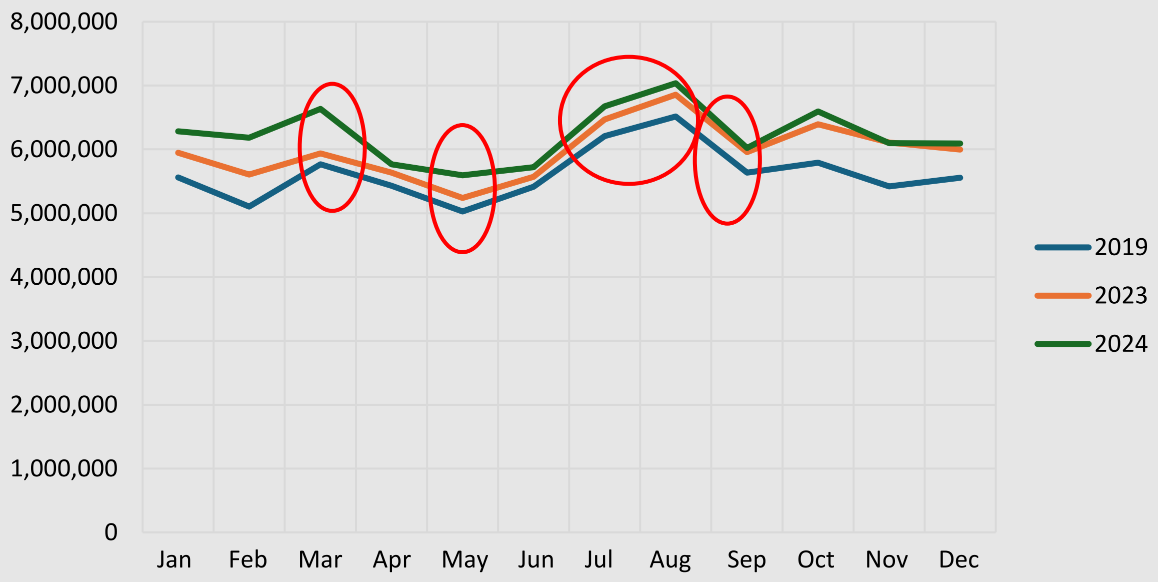
Seasonal concentration of overnight stays in hotels and apartments in the Canary Islands (international tourists, mainland tourists and Canary Island residents)



Note: The Gini Index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Tourist Accommodation Surveys (ISTAC).

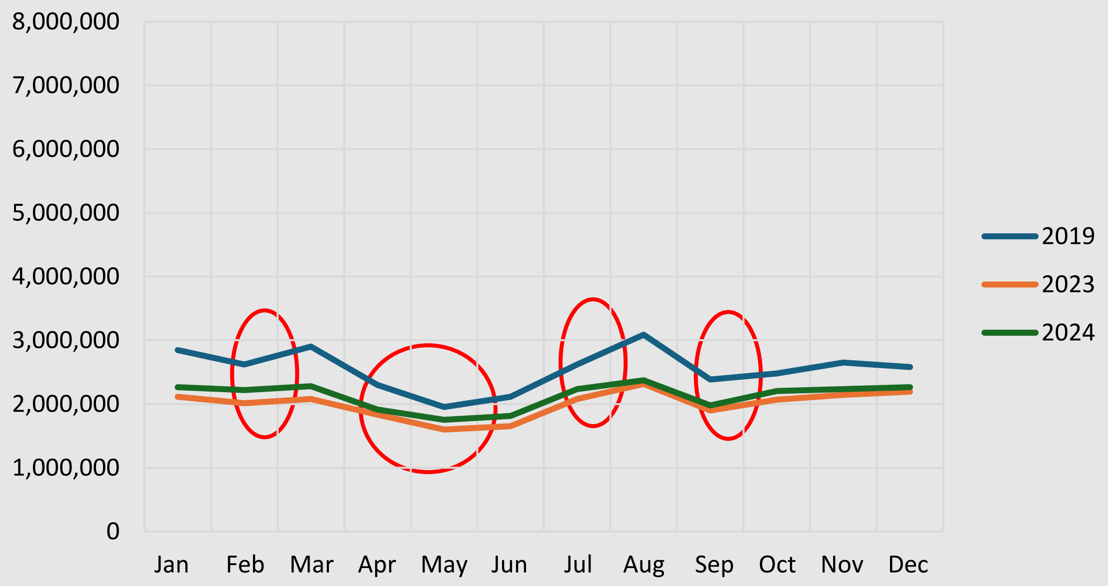
The data from the ISTAC Tourist Accommodation Survey, broken down by accommodation type, shows remarkable stability in overnight stays (international, mainland Spanish, and Canary Island residents) in both hotels and apartments during 2019, 2023, and 2024. However, the differences between these two accommodation types are significant in absolute terms: hotels register approximately 6 million overnight stays per month, while apartments account for around 2 million. Regarding trends, it is observed that overnight stays in apartments in 2023 and 2024 are lower than in 2019, contrasting with hotels, where the values for 2023 and 2024 surpass those of 2019. This indicates a recovery in the hotel sector after the COVID-19 pandemic. As for seasonal patterns, both accommodation types exhibit relatively similar behaviours, with peak periods in March and August, followed by declines in the subsequent months. However, to better understand these differences, it is useful to analyse the data in relative terms, as illustrated in the following graph.

Overnight stays in hotels in the Canary Islands



Source: Tourist Accommodation Surveys (ISTAC)

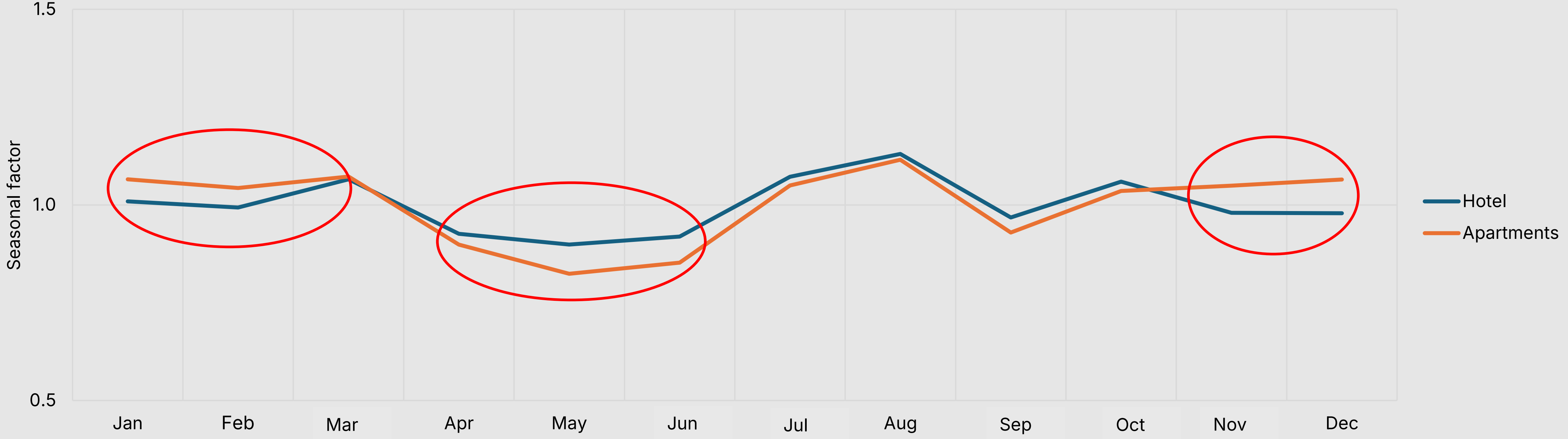
Overnight stays in apartments in the Canary Islands



Source: Tourist Accommodation Surveys (ISTAC)

The seasonal factor, defined as the ratio between the monthly value and the annual monthly average (annual average = 1), has been applied to analyse overnight stays in hotels and apartments by international tourists, mainland Spanish visitors, and Canary Island residents in 2024. This indicator helps identify monthly fluctuations in relation to the annual average. The data shows that, although both hotels and apartments maintain relatively stable levels of overnight stays around the annual average, apartments exhibit a more seasonal behaviour. This greater seasonality is particularly evident in the months of April and May, where overnight stays in apartments show a significant drop. In May, the monthly value is 18% below the annual average, marking it as the month with the largest negative deviation for this accommodation type. In contrast, hotels display a more even distribution throughout the year, with more moderate fluctuations.

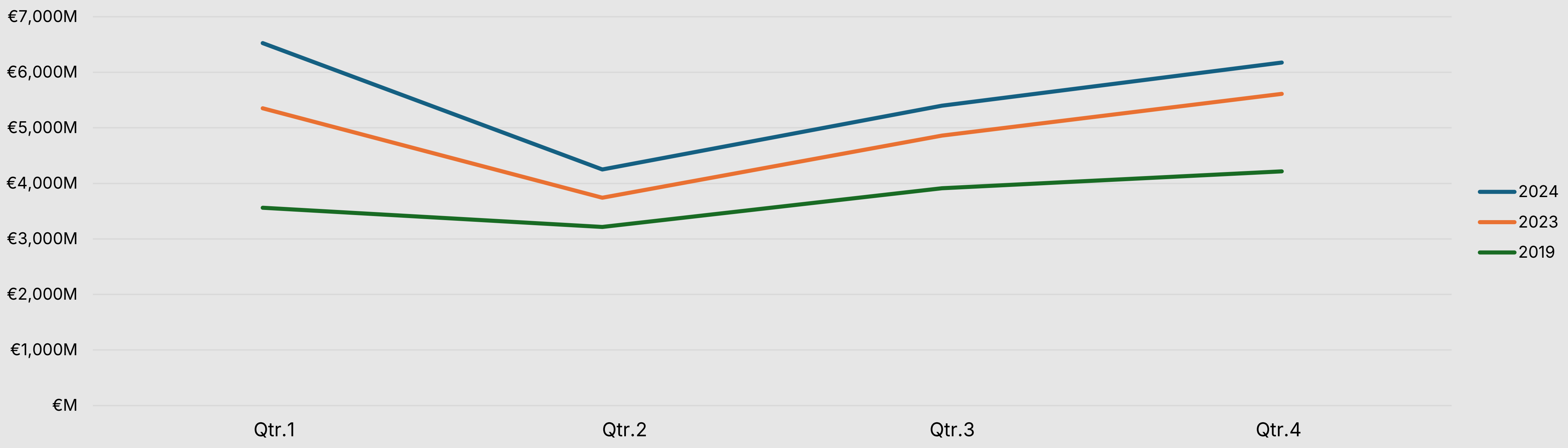
Seasonality of overnight stays in establishments in the Canary Islands in 2024 (international tourists, mainland tourists and Canary Island residents)



Note: The seasonal factor is the quotient between the monthly value and the annual monthly average (average of the seasonal factor = 1). Source: Tourist Accommodation Surveys (ISTAC)

The data from the Tourist Expenditure Survey by ISTAC for the years 2019, 2023, and 2024 reveals that seasonality in the Canary Islands, measured through quarterly tourist expenditure, is more pronounced compared to other indicators such as capacity, tourists, or overnight stays. A marked decline is observed in the second quarter, which represents the period of lowest expenditure in all three years analysed. In contrast, the first and fourth quarters show the highest levels of expenditure, except in 2019, when the third quarter slightly exceeds the first. In 2024, the total expenditure recorded in the Canary Islands amounted to 22.351 billion euros, with a peak value of 6.526 billion euros in the first quarter and a low of 4.250 billion euros in the second quarter, reflecting a difference of 2.275 billion euros between these two periods.

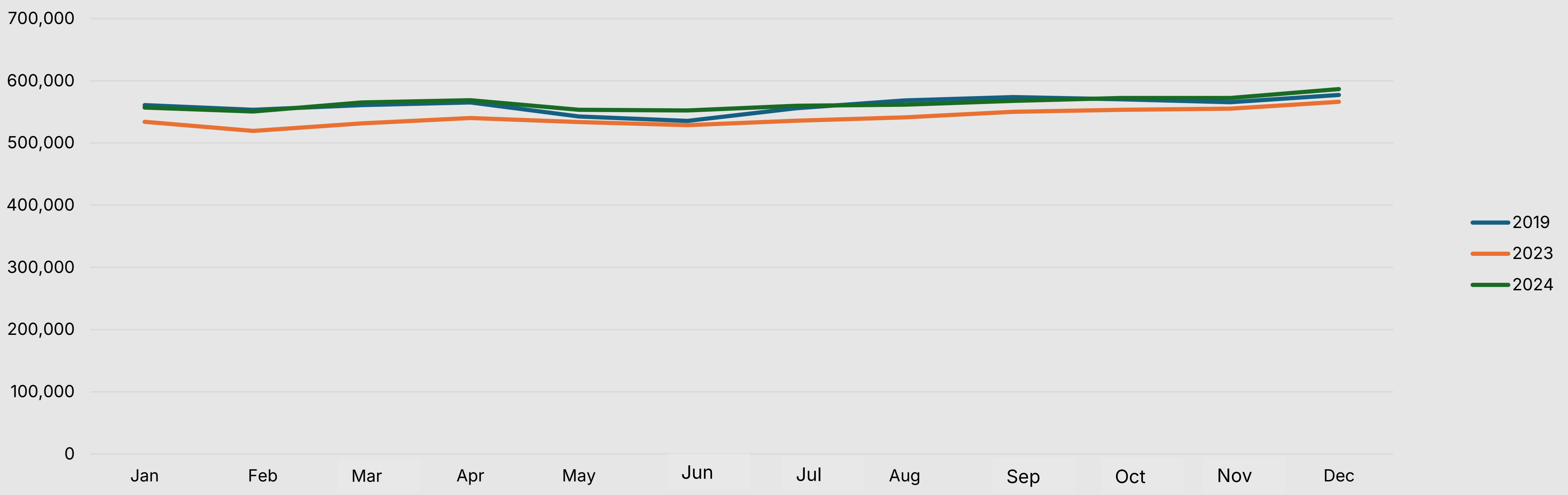
Quarterly aggregate tourist expenditure in the Canary Islands (€ million): foreign and mainland tourists



Source: Survey on Tourist Expenditure (ISTAC)

According to the data from the Tourist Accommodation Survey by ISTAC, the number of available tourist accommodation places in the Canary Islands during 2019, 2023, and 2024 shows notable stability throughout the year, with a monthly average close to 550,000 available places. This behaviour indicates the low seasonality of the tourism offer in the archipelago, highlighting that there are no seasonal closures. It is important to note that these figures include the total number of places in hotels, apartments, and vacation homes. In the case of vacation homes (VV), those offered on online platforms are considered. According to ISTAC's criteria, a vacation home is considered open (or available) if it has been booked at least once during the reference month or the month immediately preceding it.

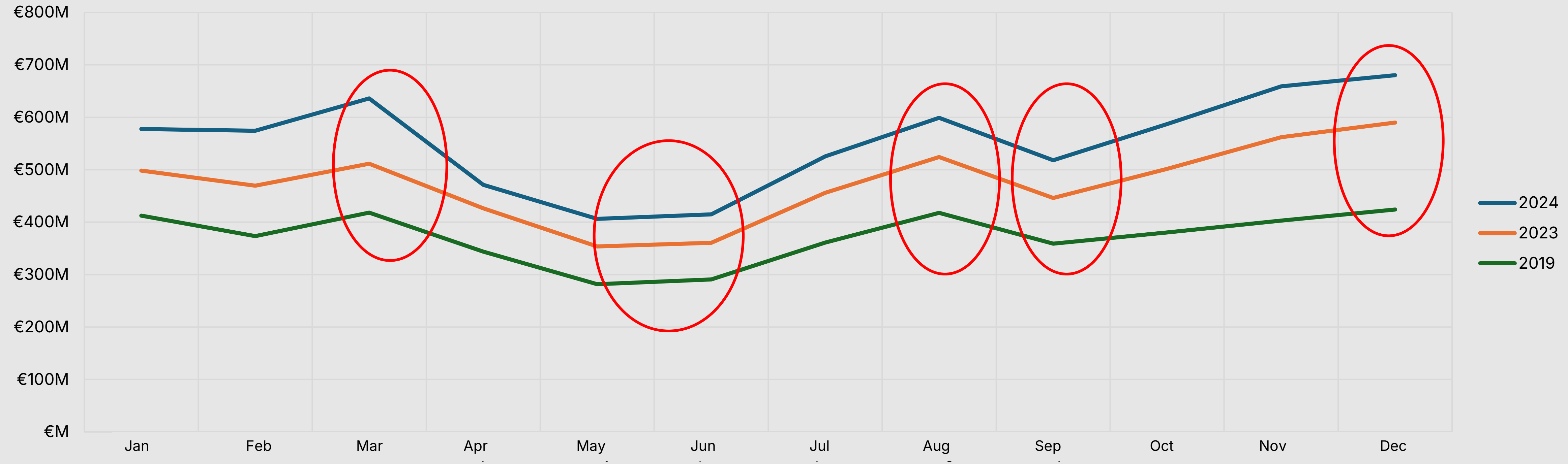
Open accommodation places in the Canary Islands (includes hotels, apartments and short-term rentals)



Source: Tourist Accommodation Surveys (ISTAC)

The monthly revenues in tourist establishments, including hotels, apartments, and vacation homes, show a very similar seasonal pattern according to data from the ISTAC Tourist Accommodation Surveys for 2019, 2023, and 2024. Revenues exhibit a significant peak in March, followed by a pronounced drop reaching near-minimum values in May and April. In 2024, revenues decreased from €636 million in March to €400 million in May and June. After this month, a recovery began, reaching another peak in August, followed by another drop in September. Finally, the months of the third quarter experience notable growth, approaching maximum values again in December.

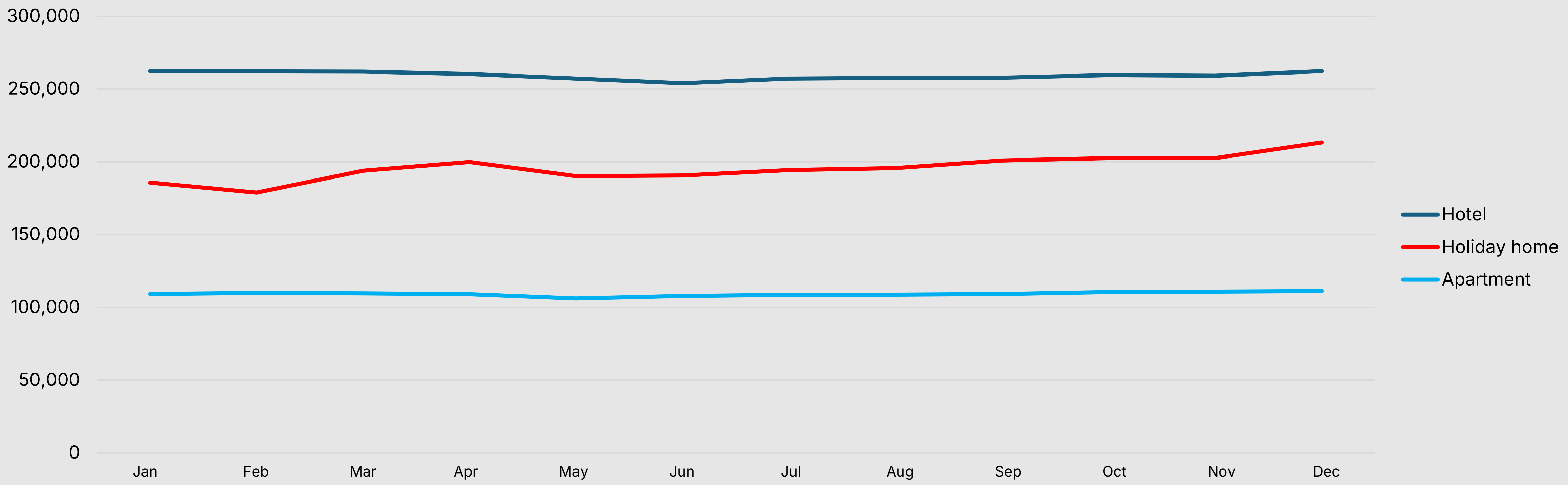
Revenue from hotels, apartments and short-term rentals in the Canary Islands (€ million)



Source: Tourist Accommodation Surveys (ISTAC)

According to the data on open accommodation capacity in the Canary Islands for 2024 from the ISTAC Tourist Accommodation Survey, it is observed that hotel capacity, which represents the largest proportion, maintains notable stability throughout the year, with values close to 260,000 monthly beds. A similar pattern is identified in apartments, whose supply remains very stable around 110,000 monthly beds. The capacity corresponding to vacation homes, which constitute the second most important accommodation type, with an average of around 200,000 beds per month in 2024, shows a more seasonal behaviour compared to other types. Although the open capacity for vacation homes is also quite stable, slight fluctuations are detected throughout the year. These fluctuations manifest in specific peaks during the months of April and December, while declines are observed in the months of January, February, and May.

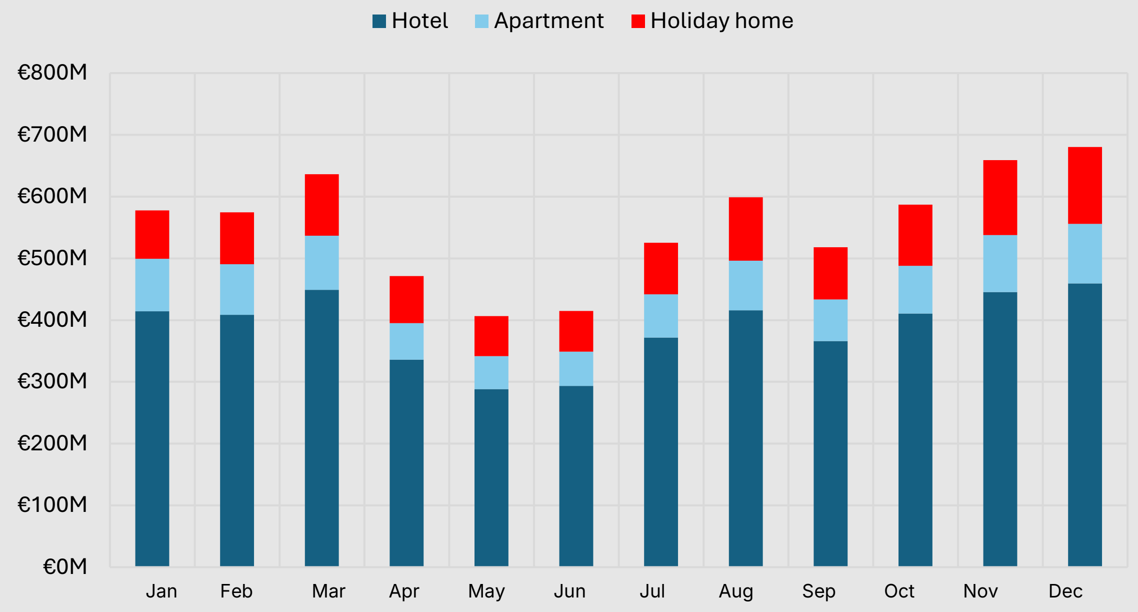
Accommodation places open in the Canary Islands (2024)



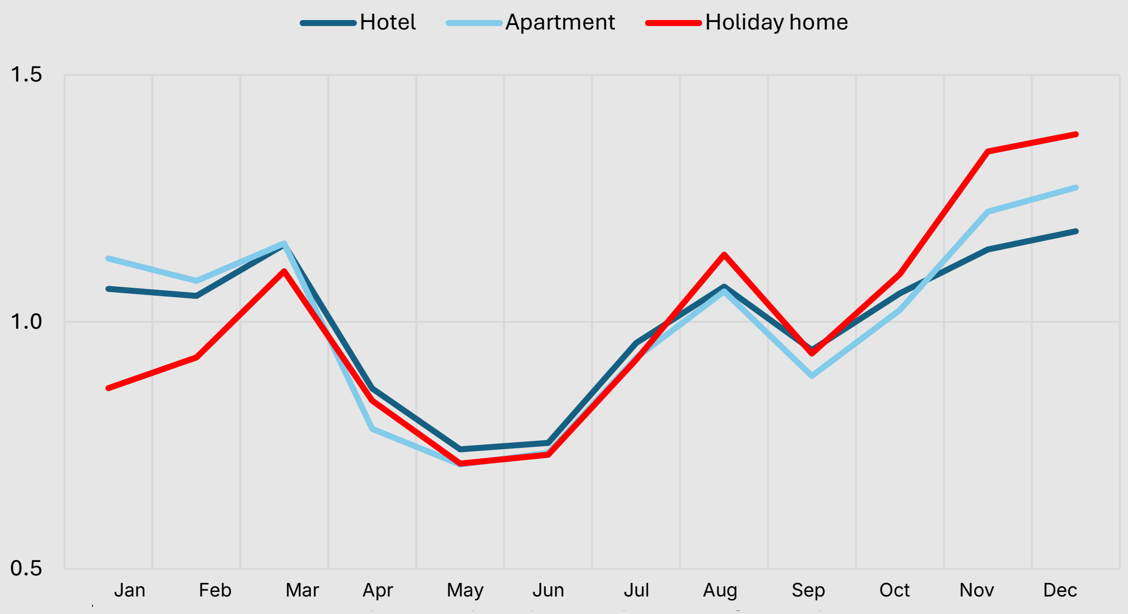
Source: Tourist Accommodation Surveys (ISTAC)

According to the data from the ISTAC Accommodation Survey, the total monthly revenues in tourist accommodation establishments in the Canary Islands in 2024 (left chart) exhibit a relatively seasonal pattern. A significant peak is observed in March, followed by a sharp decline in April and May. Afterward, the revenues begin a steady recovery, reaching another peak in August, followed by a drop in September. During the last quarter of the year, revenues grow steadily and significantly, culminating in the annual maximum in December. In terms of distribution by type, hotels account for the majority of revenues (70%), followed by vacation homes (16%) and apartments (14%). While the seasonal patterns of these three types are similar, notable differences exist, particularly with vacation homes. The revenues of this category display more pronounced seasonality (right chart), with sharper peaks in August and during the last quarter of the year (with December revenues being 40% higher than the annual average). In contrast, revenues in January and February for vacation homes are below the annual average, which contrasts with the trend in hotels and apartments, which have revenues above their average during these months.

Monthly income in accommodation establishments in the Canary Islands according to typologies in 2024 (million €)



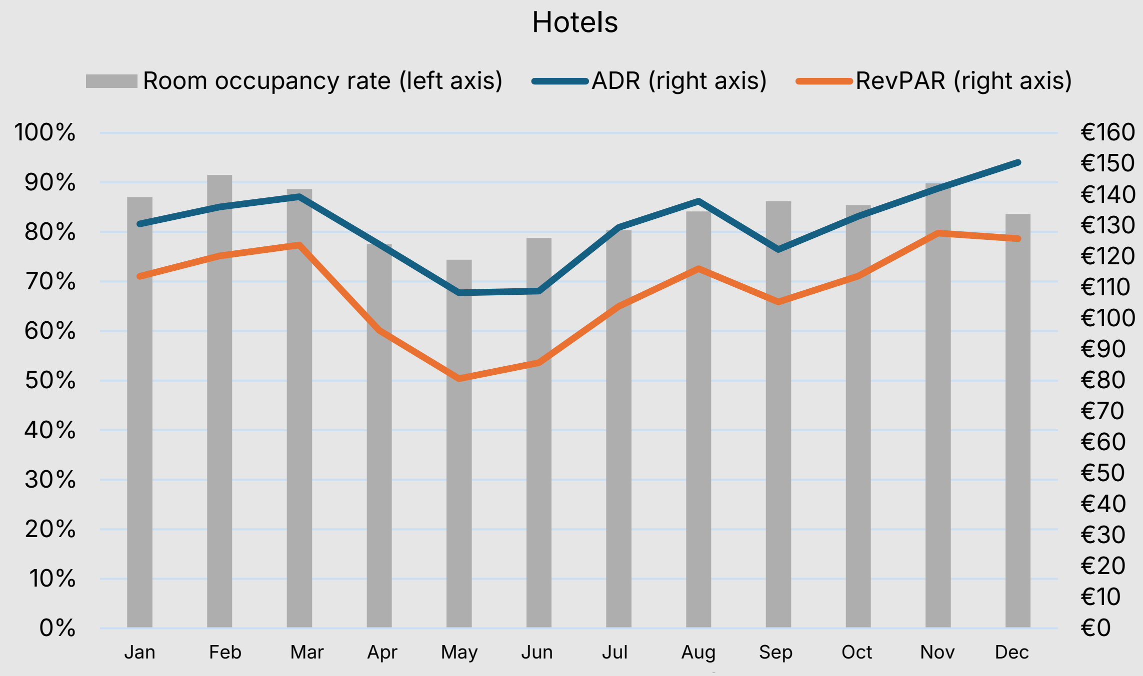
Seasonal factor of monthly income in accommodation establishments in the Canary Islands by typology (2024)

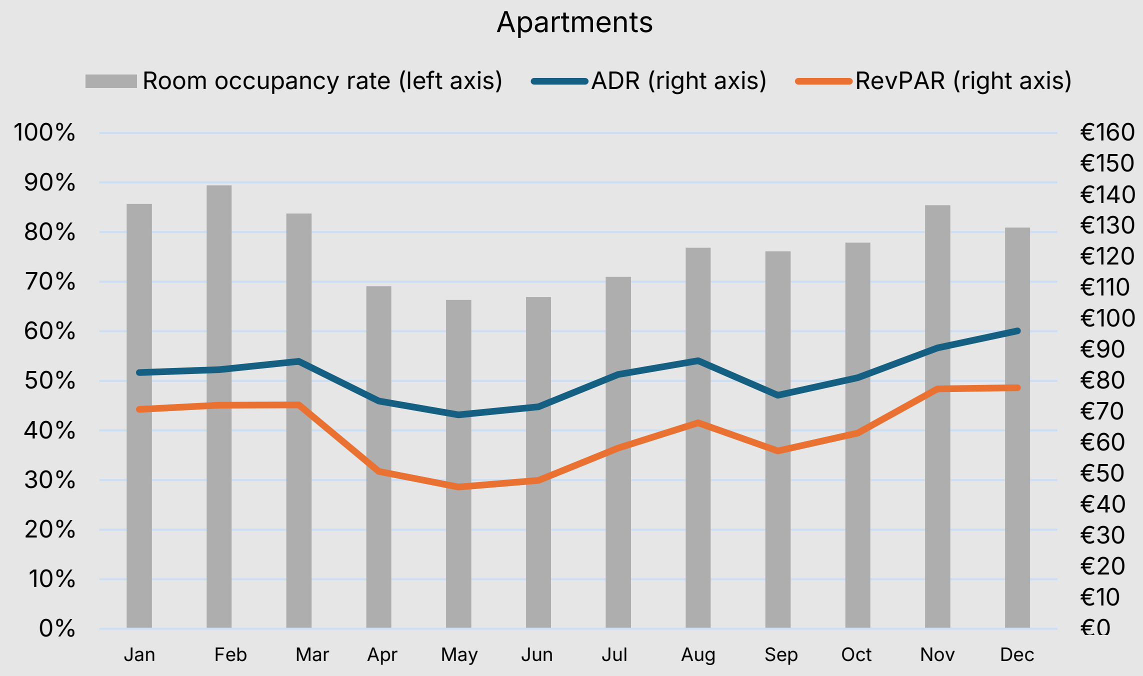


Note (right graph): The seasonal factor is the quotient between the monthly value and the annual monthly average (average of the seasonal factor = 1). Source: Tourist Accommodation Surveys (ISTAC)

The high season in the Canary Islands is concentrated between November and March, largely coinciding with the winter months. This is reflected in the Average Daily Rate (ADR), which reaches its highest values during this period, especially in November and December, for both hotels and apartments in 2024. Alongside the high occupancy during these months, this drives Revenue per Available Room (RevPAR) to peak levels between November and March. In contrast, the second quarter sees a notable decline in ADR and occupancy, and therefore in RevPAR, for both types of accommodation, hitting lows in May, followed by a sustained recovery that peaks in August. Although the three indicators analysed follow a similar monthly pattern for both types of accommodation, the values differ significantly, with hotels recording higher occupancy levels, prices, and average revenues compared to apartments in 2024.

Monthly Accommodation Indicators in the Canary Islands (2024)

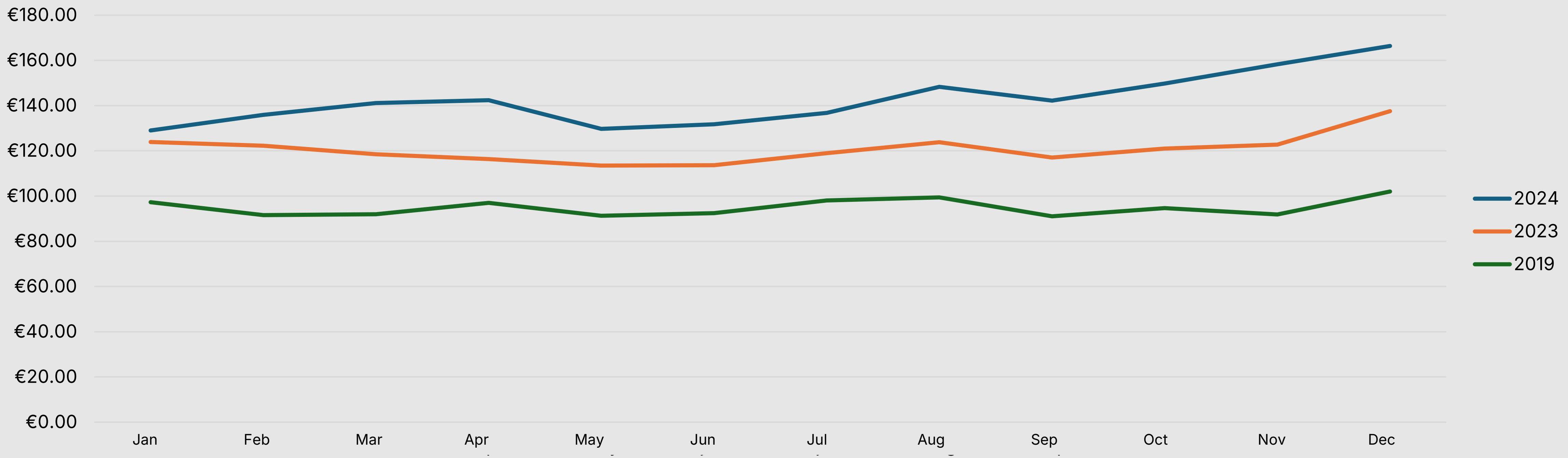




Source: Tourist Accommodation Surveys (ISTAC)

The Average Daily Rate (ADR) of holiday rental properties in the Canary Islands shows a seasonal pattern with slight monthly variation and a progressive increase towards the end of the year, peaking in December. This behaviour reflects both seasonality and a sustained upward trend in prices, with 2024 rates exceeding those of 2023 and 2019, according to ISTAC data for short-term rentals listed on online platforms. It is important to note that this rate refers to the average price of an entire holiday home listed on such platforms, whereas the ADR for hotels and apartments refers to the average daily rate of a double room, excluding taxes and based on accommodation only. This constitutes a fundamental difference in the calculation method of both indicators and therefore in their comparability.

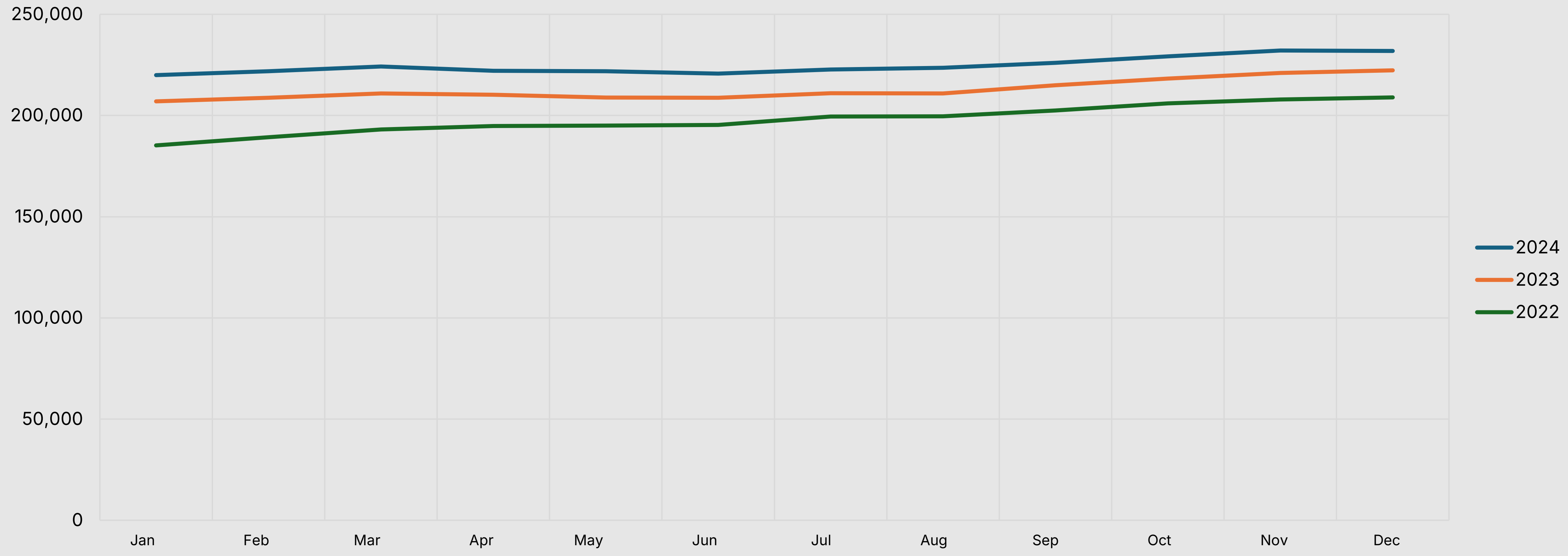
Average daily rate of short-term rentals in the Canary Islands (complete housing)



Source: Tourist Accommodation Surveys (ISTAC)

Tourism employment in the Canary Islands remains highly stable throughout the year, as evidenced by the monthly Social Security affiliations in tourism-characteristic activities for the years 2022, 2023 and 2024, with figures hovering around 200,000 affiliations.

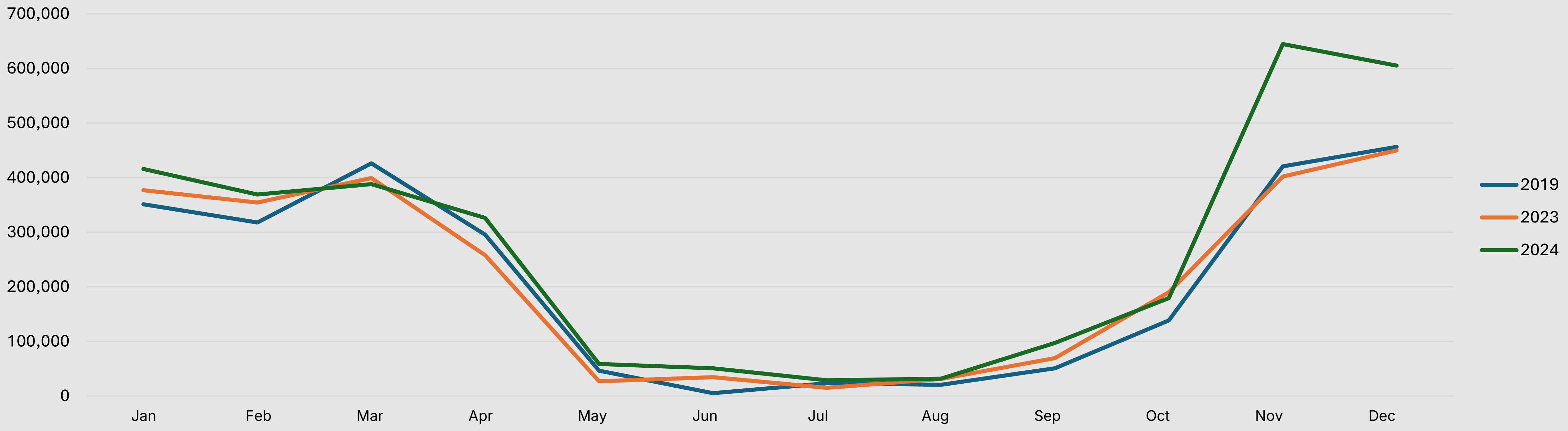
Employment in the characteristic activities of tourism in the Canary Islands



Note: 2019 is not added because the data for that year was provided on a quarterly basis. Source: Social Security affiliations in activities characteristic of tourism. Place of residence (ISTAC)

Cruise passenger arrivals at state-owned ports of the Canary Islands in 2019, 2023 and 2024 show a marked seasonal pattern. The high cruise season runs from October to April, while the low season extends from May to September. This pattern remains consistent across the three years analysed, although November 2024 saw a significant increase compared to the same month in previous years, rising from 400,000 to 645,000 cruise passengers. Despite a slight subsequent decline, the figures for December 2024 also notably exceed those of previous years. Unlike air arrivals, which remain relatively steady throughout the year with minor variations, cruise tourism in the Canary Islands experiences more pronounced fluctuations. In some months, such as June 2019, cruise passenger numbers barely reached 5,000. This seasonal pattern is driven by the operational dynamics of the sector, as cruise lines relocate their ships from the Mediterranean and the fjords to the Caribbean at the end of the season, and vice versa, enabling the Canary Islands to benefit from these seasonal transfers.

Arrival of cruise passengers at state-owned ports of the Canary Islands

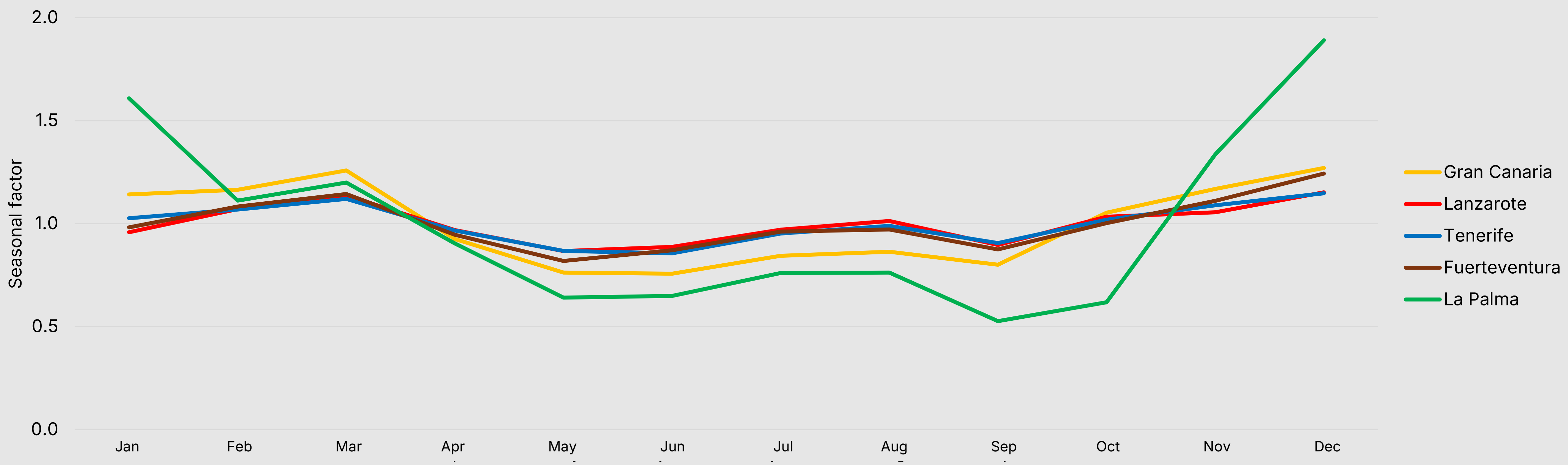


Source: Port Authority of Santa Cruz de Tenerife and Port Authority of Las Palmas through ISTAC

Seasonality at the island scale

Seasonality in tourist arrivals from abroad and mainland Spain to the islands in 2024 shows relative stability throughout the year, as indicated by a seasonal factor close to 1 in most months. However, there are notable differences between islands, particularly in the case of La Palma, which exhibits a much more seasonal pattern, with sharp peaks in January, November and December, and significant declines in May-June and September-October. Gran Canaria also stands out, albeit to a lesser extent, for displaying a more seasonal pattern compared to the other islands

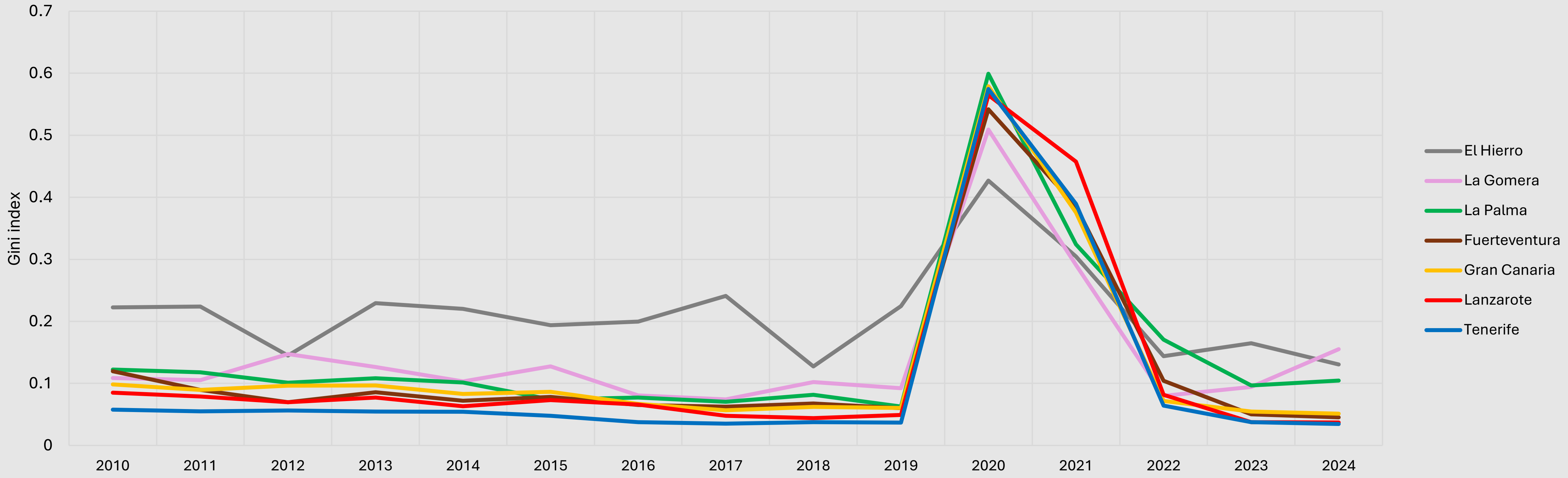
Seasonality of tourists (foreign and mainland) by islands (2024)



Note: The seasonal factor is the quotient between the monthly value and the annual monthly average (average of the seasonal factor = 1). Source: FRONTUR-Canarias (ISTAC)

The seasonality of monthly overnight stays in hotels and apartments, measured using the Gini Index, shows that, overall, the four main tourist islands, Tenerife, Gran Canaria, Lanzarote and Fuerteventura, record values below 0.1 between 2010 and 2019, with Tenerife being the least seasonal. In 2020, concentration spiked due to the impact of the COVID-19 pandemic, as overnight stays were limited to the few months in which tourism activity resumed. In the following years, the index returned to pre-pandemic levels, reaching historic lows in 2024. In contrast, the islands of La Palma, La Gomera and El Hierro present higher values. In the case of El Hierro, the index exceeds 0.2 in some years of the series. Therefore, it can be concluded that, with these exceptions, the islands as a whole display low seasonality in overnight stays throughout the year. Furthermore, the indicator shows a downward trend.

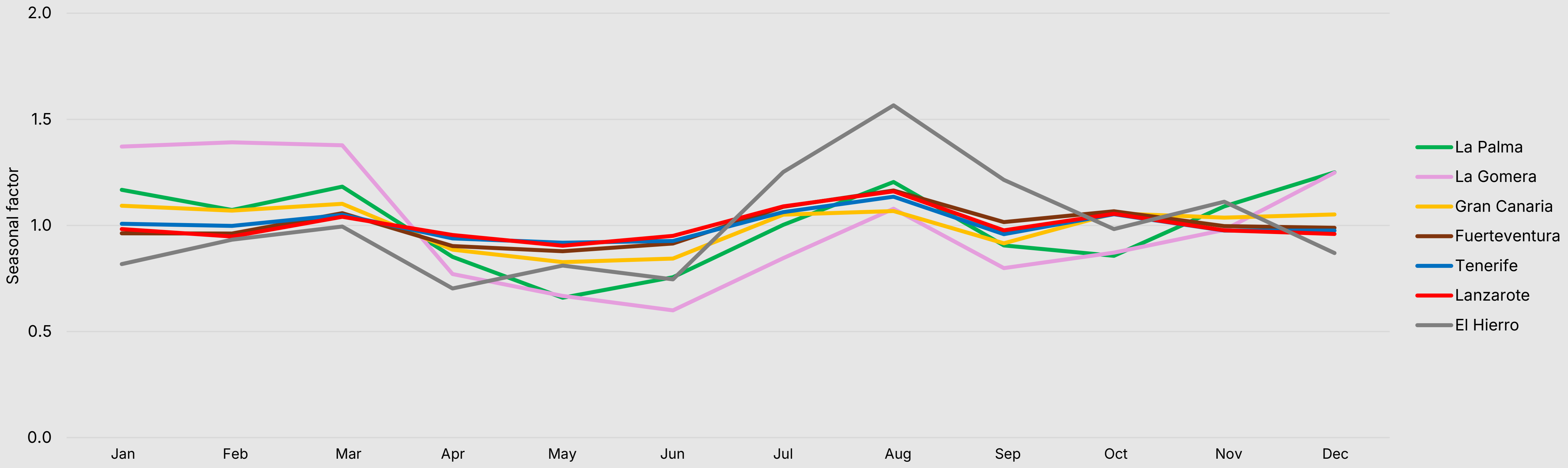
Seasonal concentration of overnight stays in hotels and apartments (international tourists, mainland tourists and Canarian residents)



Note: The Gini Index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Tourist Accommodation Surveys (ISTAC)

Monthly overnight stays in hotels and apartments in 2024 show a relatively stable seasonal pattern across the islands, with slight peaks and troughs that, while occurring in the same months, vary in intensity between islands. On the one hand, the main tourist islands, Tenerife, Gran Canaria, Lanzarote and Fuerteventura, display more stable patterns, with values closely aligned with the annual monthly average, as indicated by a seasonal factor around 1. On the other hand, the islands of El Hierro, La Gomera and, to a lesser extent, La Palma, exhibit more pronounced seasonal patterns. In the case of El Hierro, a sharp peak is recorded in August, with overnight stays 50% above the annual monthly average. La Gomera shows high levels between January and March, followed by the most marked decline in the archipelago in June. Meanwhile, La Palma also experiences more pronounced fluctuations than the main tourist islands, although in a more moderate manner.

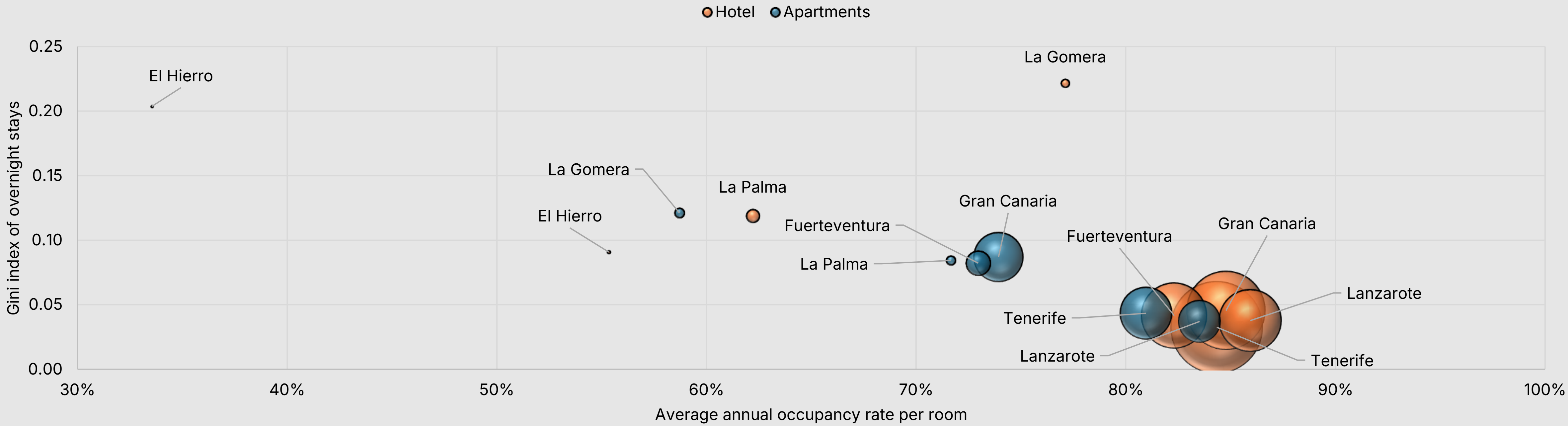
Seasonality of overnight stays in hotels and apartments in 2024 (foreign tourists, mainland tourists and Canary Island residents)



Note: The Gini Index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Tourist Accommodation Surveys (ISTAC)

The chart highlights notable differences in the use of accommodation capacity between the main tourist islands (Tenerife, Gran Canaria, Fuerteventura and Lanzarote) and the lesser-visited islands of La Palma, La Gomera and El Hierro. The main tourist islands show occupancy rates above 80% and very low seasonality (with a Gini Index below 0.05), especially in hotels, the accommodation type that accounts for the highest volume of overnight stays, as reflected by the size of the bubbles. In contrast, apartments in Gran Canaria and Fuerteventura register occupancy rates below 75% and higher seasonality, unlike those in Lanzarote and Tenerife. Among the lesser-visited islands, La Palma records lower hotel occupancy rates and higher seasonality compared to apartments. La Gomera stands out for its high hotel occupancy, albeit with the highest recorded level of seasonality (Gini Index = 0.22). Conversely, apartments in El Hierro show the lowest occupancy rate (33.5%) and markedly high seasonality.

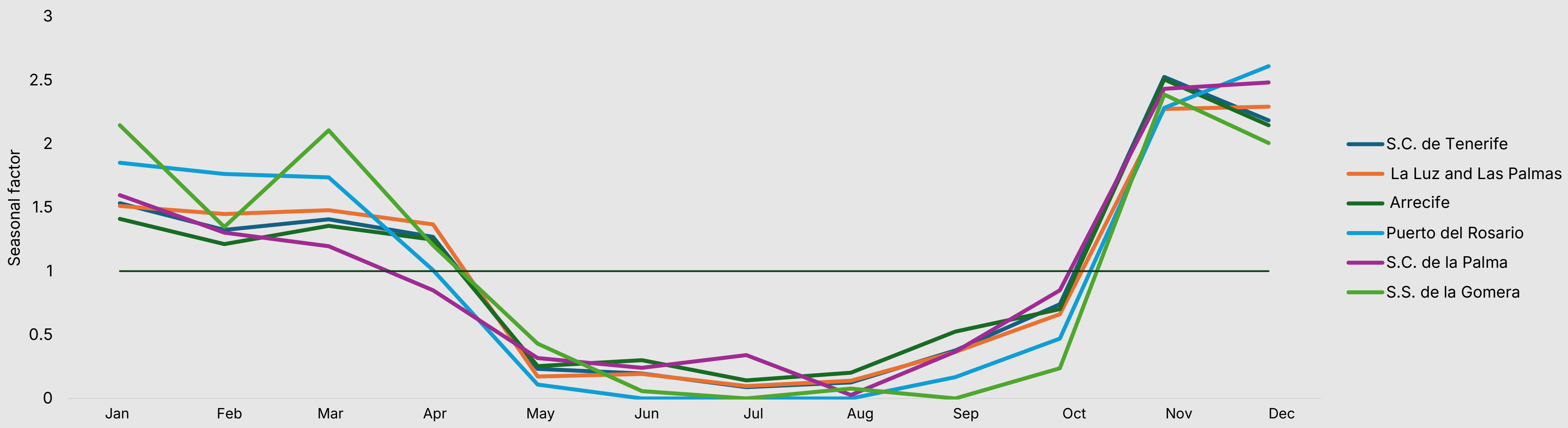
Use of accommodation capacity in hotels and apartments by island (2024): seasonality, occupancy and overnight stays (international tourists, mainland tourists and Canary Island residents)



Note: The bubble area represents total overnight stays. Gini index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Tourist Accommodation Surveys (ISTAC)

Cruise passenger arrivals at state-owned ports of the Canary Islands in 2024 exhibit a fairly consistent seasonal pattern across ports, with a high season from October to April and a low season from May to September, in line with the general trend across the archipelago. This marked seasonality reflects operational dynamics in the cruise industry, as the Canary Islands serve as a transit point for vessels relocating between the Mediterranean and the fjords to the Caribbean and vice versa. The seasonal factor reveals slight differences between ports. In 2024, Puerto del Rosario shows the highest seasonality, followed by San Sebastián de La Gomera and Santa Cruz de La Palma. Regarding the distribution of cruise passenger traffic, Santa Cruz de Tenerife and La Luz and Las Palmas handle the majority, accounting for 30.5% and 27.8% of the total, respectively. They are followed by Arrecife (19.1%) and Puerto del Rosario (11.8%). To a lesser extent, Santa Cruz de La Palma receives 8.0%, while San Sebastián de La Gomera accounts for 2.8%. The ports of La Estaca and Los Cristianos record cruise passenger arrivals of less than 1% of the total and have therefore been excluded from the analysis.

Seasonality of cruise passenger arrivals at the state-owned ports of the Canary Islands (2024)

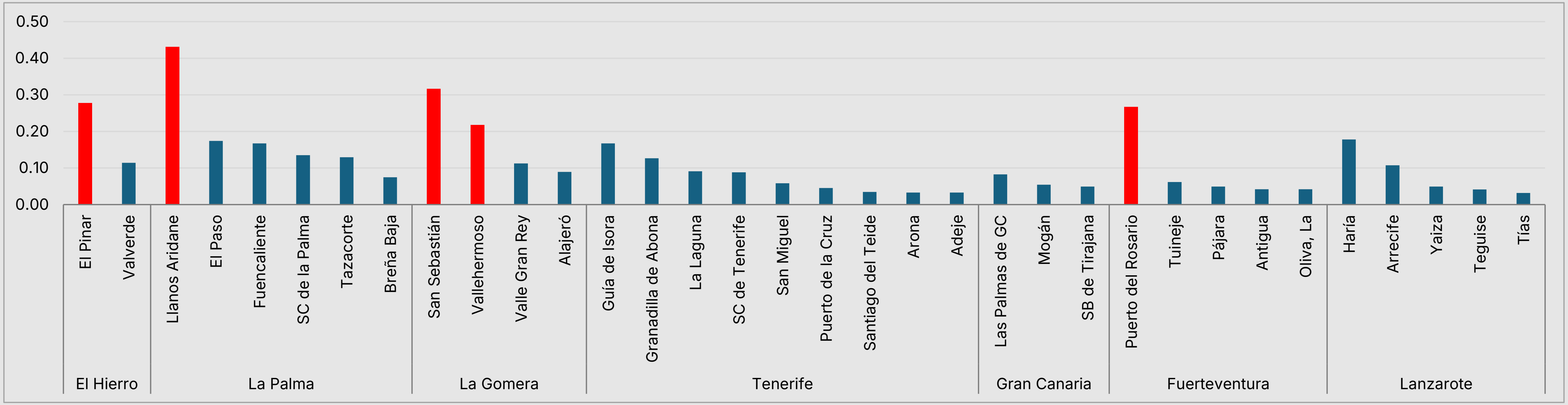


Note: The seasonal factor is the quotient between the monthly value and the annual monthly average (average of the seasonal factor = 1). Source: Port Authority of Santa Cruz de Tenerife and Port Authority of Las Palmas through ISTAC

Seasonality at the municipal level

The seasonality of monthly overnight stays in hotels and apartments in the main tourist municipalities of the Canary Islands in 2024, measured using the Gini Index, shows a low level of concentration in most municipalities, as indicated by index values close to 0 (on a scale where 0 represents minimal concentration and 1 represents maximum). This suggests a balanced distribution of overnight stays throughout the year. However, some municipalities record index values above 0.20, indicating moderate seasonal concentration, with Los Llanos de Aridane registering the highest index (0.43), reflecting significant seasonality. This analysis highlights that, although the Canary Islands and their individual islands display low overall seasonality in overnight stays, a more detailed municipal-level analysis reveals specific areas with seasonal concentration issues.

Seasonal concentration of overnight stays in hotels and apartments by main municipalities (2024): international tourists, mainland tourists and Canary Island residents



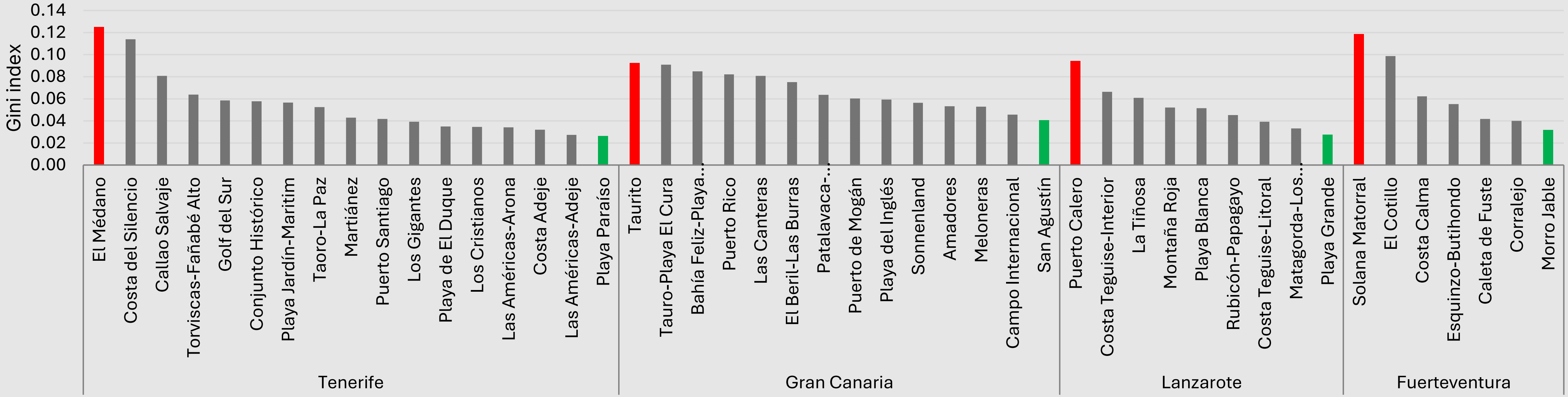
Note: The Gini Index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Tourist Accommodation Surveys (ISTAC)

Seasonality at the scale of tourist centres

Seasonality in monthly overnight stays in hotels and apartments in 2024 is low across the 47 tourist micro-destinations of the Canary Islands, as reflected by Gini Index values close to 0 (on a scale where 0 indicates minimal concentration and 1 indicates maximum). These micro-destinations, which cover only 1.7% of the territory, accounted for 93.2% of total annual overnight stays, indicating that the main areas of high tourist concentration show low monthly seasonality in overnight stays.

However, a detailed analysis by micro-destination reveals slight differences among them (with each island's maximum values in red and minimum in green), with El Médano (Tenerife) recording the highest index at 0.13. Although these variations are moderate, they highlight micro-spatial contrasts that may influence other local-level tourism sustainability indicators.

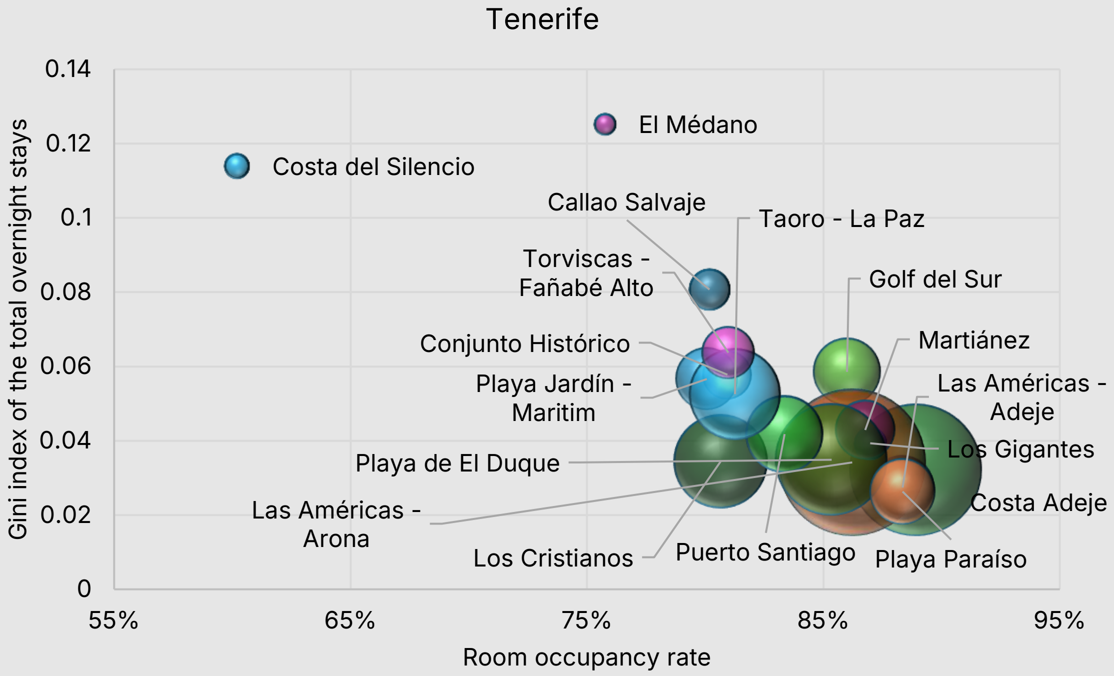
Seasonal concentration of overnight stays in hotels and apartments by tourist centres (2024): international, mainland Spain and Canary Islands residents

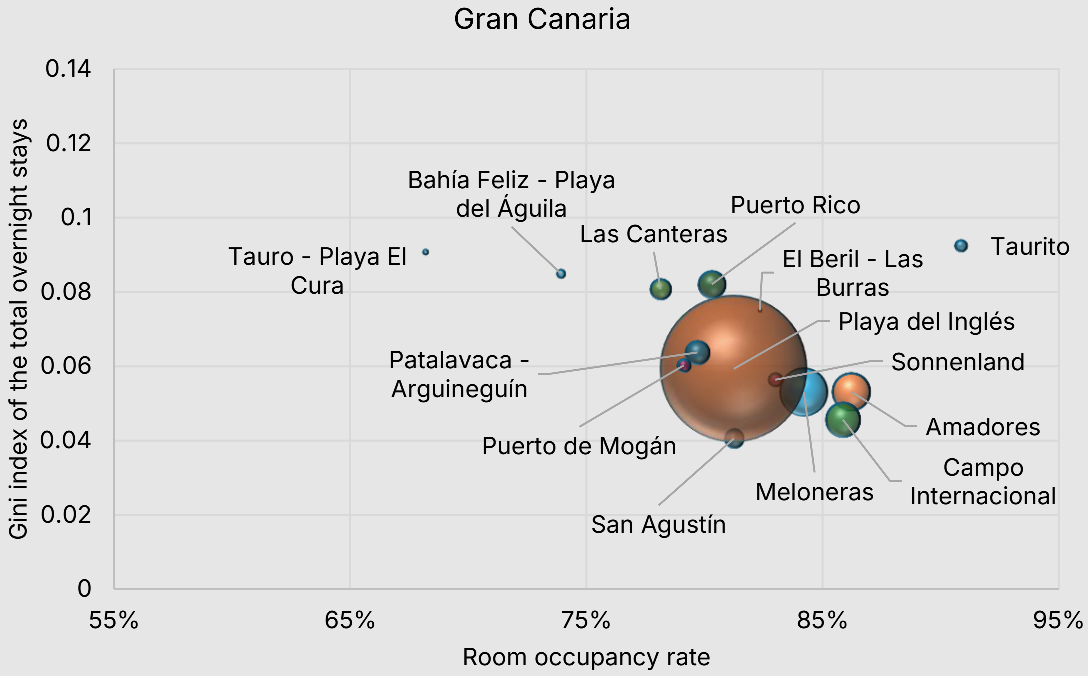


Note: The Gini Index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Tourist Accommodation Survey (ISTAC)

Tourist micro-destinations with higher volumes of overnight stays tend to show higher occupancy rates and lower seasonality, revealing an inverse relationship between these two indicators. The size of the bubbles represents total overnight stays, illustrating that micro-destinations with larger volumes generally exhibit lower seasonality and higher occupancy. However, some exceptions are observed, such as El Médano (Tenerife) and Taurito (Gran Canaria), which show "high" seasonality despite their high occupancy levels. Lastly, differences can be noted between the micro-destinations of the two islands: Tenerife displays higher occupancy rates, lower seasonality, and a more spatially distributed pattern of overnight stays, whereas in Gran Canaria they are mainly concentrated in Playa del Inglés.

Use of accommodation capacity in hotels and apartments in the micro-destinations of the Canary Islands (2024): seasonality, occupancy and overnight stays (international tourists, mainland tourists and Canary Island residents)

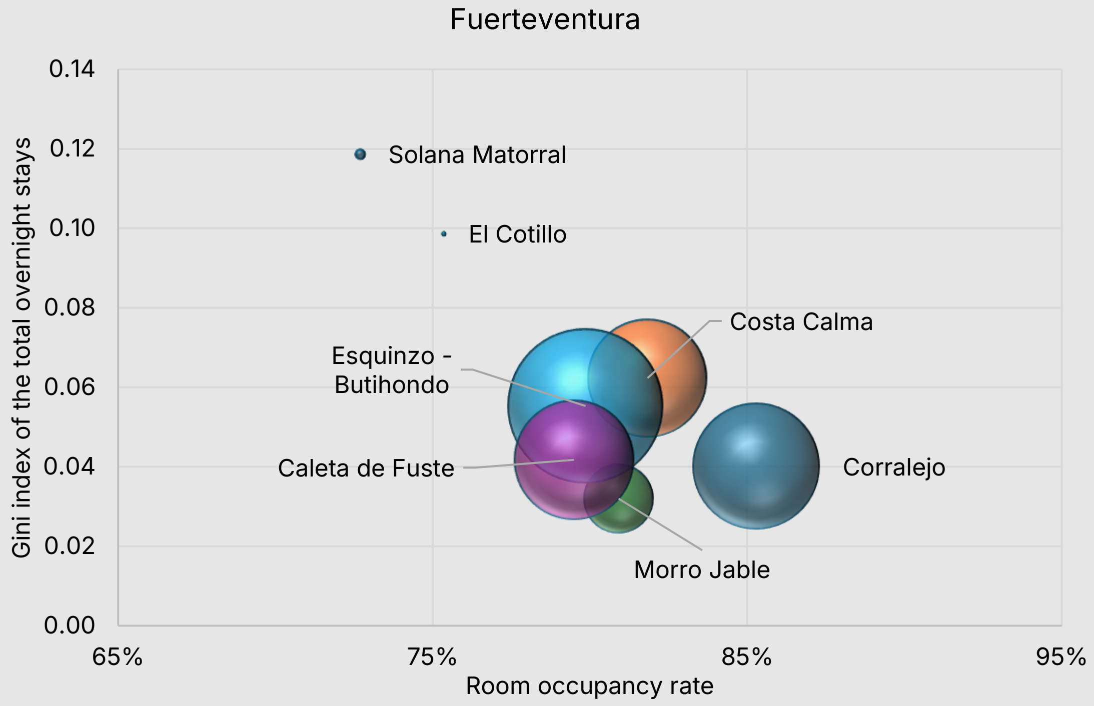


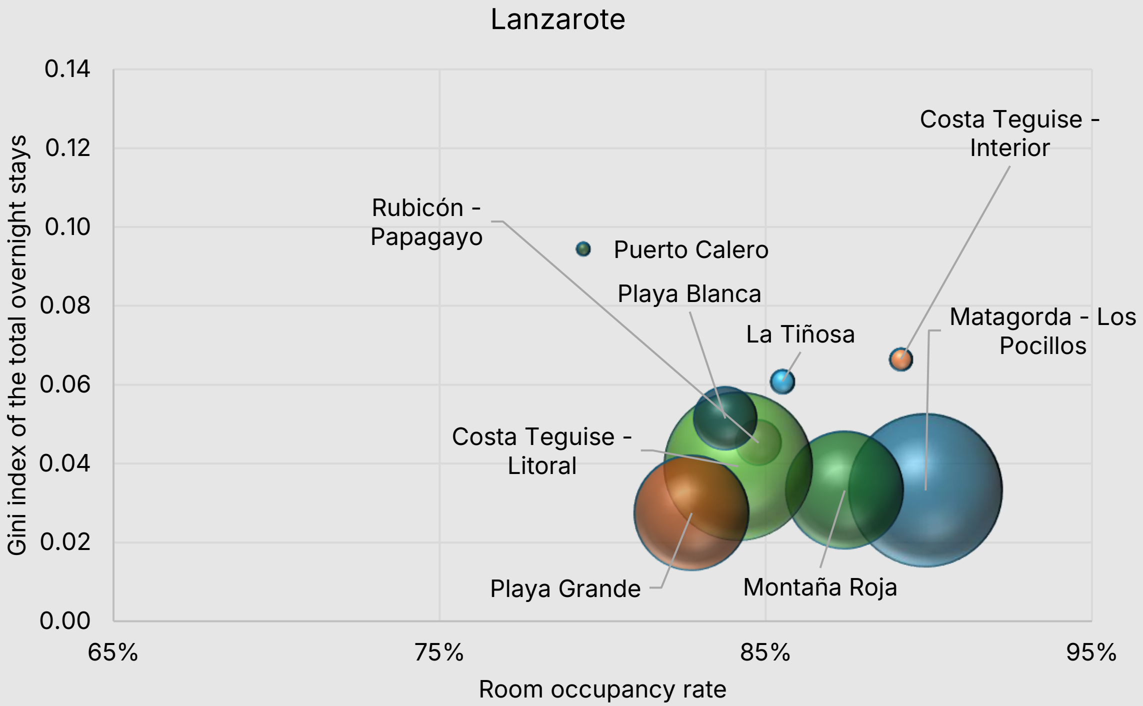


Note: The width of the bubble represents the total overnight stays. Gini index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Tourist Accommodation Surveys (ISTAC)

The micro-destinations of Fuerteventura and Lanzarote show that those with higher volumes of overnight stays record high occupancy rates and low seasonality. However, exceptions exist, such as Costa Teguise–Interior in Lanzarote, which, despite having the island's second-highest occupancy rate, presents one of the highest Gini Index values. Unlike Tenerife and Gran Canaria, overnight stays in hotels and apartments in Fuerteventura and Lanzarote are more evenly distributed spatially among the micro-destinations, as reflected by the size of the bubbles. Finally, Lanzarote displays higher occupancy rates and lower seasonality (which is low across all cases) compared to Fuerteventura.

Use of accommodation capacity in hotels and apartments in the micro-destinations of the Canary Islands (2024): seasonality, occupancy and overnight stays (international tourists, mainland tourists and Canary Island residents)





Note: The width of the bubble represents the total overnight stays. Gini index ranges from 0 (perfect distribution or minimum seasonality) to 1 (maximum seasonality). Source: Tourist Accommodation Surveys (ISTAC)

Tourism seasonality

Indicator	Description	Availability	Fountain	Remarks
Tourist demand in high and low season	This analysis should be performed for tourist arrivals, overnight stays, spending, average daily rate (ADR), revenue per available room (RevPAR), and occupancy rates.	Available	FRONTUR-Canarias (ISTAC) Tourist Accommodation Surveys (ISTAC) Tourist Expenditure Survey (ISTAC)	For a better measurement of the seasonality of spending, monthly data is needed. They are currently offered on a quarterly basis.
Seasonality according to countries of origin	Analysis of detailed seasonal patterns for demand segments, particularly referring to countries of origin.	Available	FRONTUR-Canarias (ISTAC) Tourist Expenditure Survey (ISTAC)	
Seasonality of islands, municipalities and local tourist destinations	Analysis of seasonality patterns for main tourist islands, municipalities and local tourist destinations (micro-destinations).	Partially available	FRONTUR-Canarias (ISTAC) Tourist Accommodation Survey (ISTAC) Measurement of tourism from mobile phones (INE)	From 2023 onwards, monthly data is published for local tourist destinations (micro-destinations).

4.3

Air transport connectivity and intermediation

Introduction

Air connectivity, and in some cases maritime connectivity, is a fundamental pillar of the tourism model in the Canary Islands, given its status as an archipelago and its high dependency on international tourism. In 2024, Canary Island airports surpassed pre-pandemic levels, consolidating their role as key gateways to the destination. Gran Canaria and Tenerife South lead in passenger volume, reflecting the importance of these nodes in the islands' air transport infrastructure.

The British market remains the primary source of tourists, with over six million arrivals, followed by Germany. However, this concentration poses a risk in the face of potential economic or geopolitical crises affecting these countries. Diversifying source markets and improving connectivity with emerging destinations are key to strengthening the resilience of the sector. Connectivity with mainland Spain is dominated by Madrid, followed by Barcelona and Andalusia. Although these routes are essential for resident mobility and national tourism, their concentration in a few airports highlights the need for strategies to expand the direct connection network. Meanwhile, inter-island tourism mobility is another area where there is room for improvement, and it could play an important role in territorial cohesion and accessibility within the archipelago.

Regarding maritime transport, passenger traffic recovery has been strong, surpassing four million in 2023. The ports of Santa Cruz de Tenerife and Las Palmas lead in mobility. The case of La Graciosa stands out for its high visitor influx relative to its population. This highlights the importance of efficient inter-island transport management to balance tourist flow with the sustainability of destinations.

Spending on air transport to the Canary Islands varies significantly depending on the source market. Tourists from Nordic countries, Switzerland, and Germany make the highest expenditures, while mainland Spanish tourists register lower spending. However, the cost of transportation from the mainland remains an obstacle for tourism development. This factor raises questions about the real impact of the subsidy policy and its potential effects on prices for non-residents.

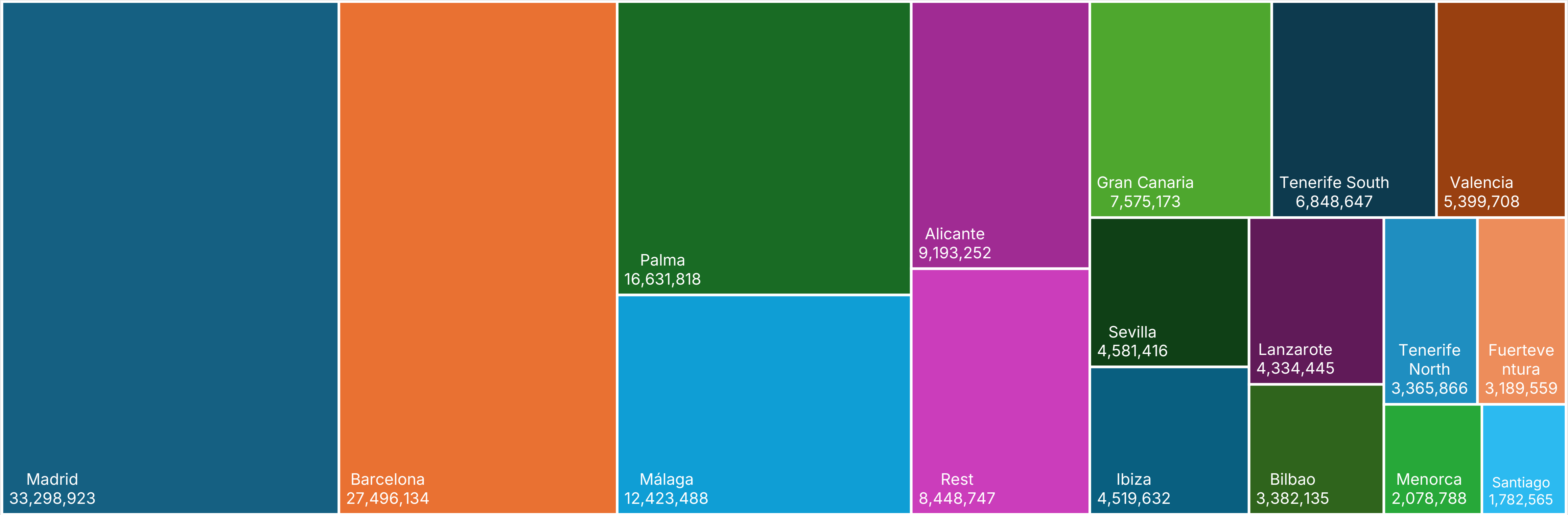
Finally, tourism intermediation continues to play a key role in shaping the market. Countries like Germany and the Nordic ones have high percentages of tourists traveling with package tours, while mainland Spanish and Italian visitors predominantly opt for independent travel. This difference has implications for tourism spending and strategic destination planning, highlighting the need to adapt to the different visitor profiles and their consumption preferences.

In terms of tourism sustainability, promoting connectivity has become a tool that must be managed carefully, as it can become a source of overcrowding. The careful selection of markets and segments to promote for their positive impacts on the archipelago must be a key part of the tourism strategy.

Air connectivity in the Canary Islands

In the Canary Islands, there are eight airports, five of which are among the top sixteen in Spain for the highest number of arrivals. Together, the Canary Island airports account for 17.0% of the total passenger arrivals to the country. Gran Canaria Airport is the main receiver of passengers in the islands, with 7.5 million arrivals, followed by Tenerife South Airport, which records 6.8 million passengers.

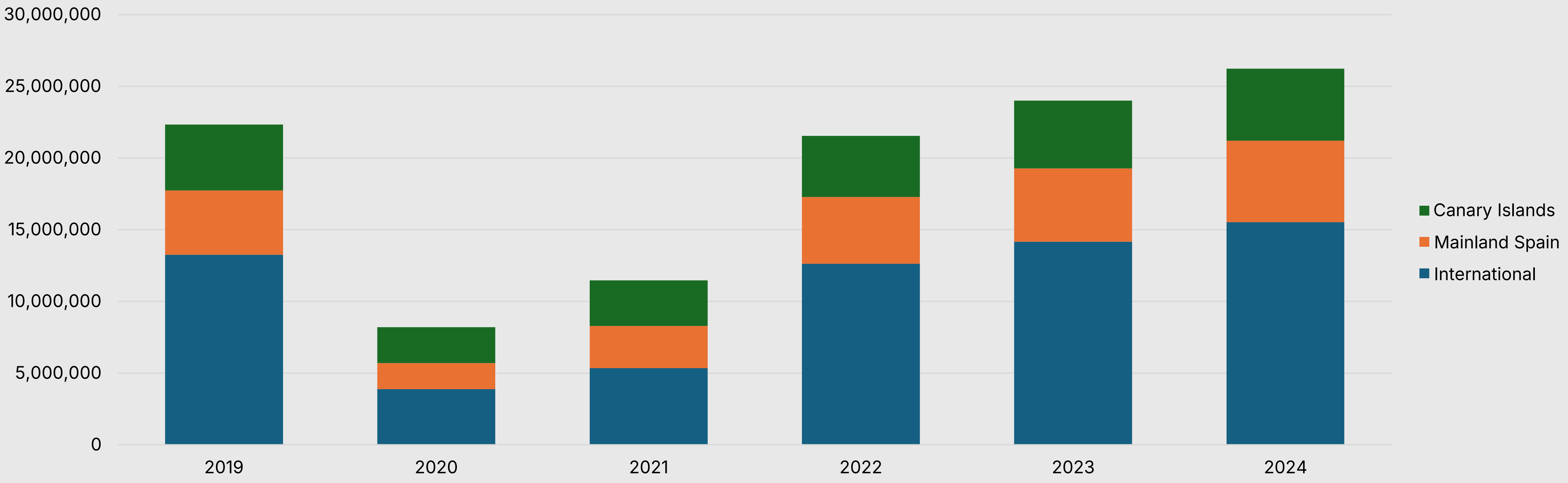
Passenger arrivals at Spain's main airports in 2024



Source: Air Traffic Statistics (Aena)

In 2019, the archipelago reached 22 million passengers, with a marked majority of international travellers, compared to those coming from the mainland and inter-island travellers. The health crisis of 2020 led to a sharp decline, reducing air traffic to just over 8 million passengers. Starting in 2021, a gradual recovery was observed, consolidating in 2022 and reaching over 26 million passengers in 2024, surpassing pre-pandemic levels. International passengers continue to lead arrivals, representing nearly 60% of the total in 2024, while passengers from the mainland and the archipelago also show stable growth.

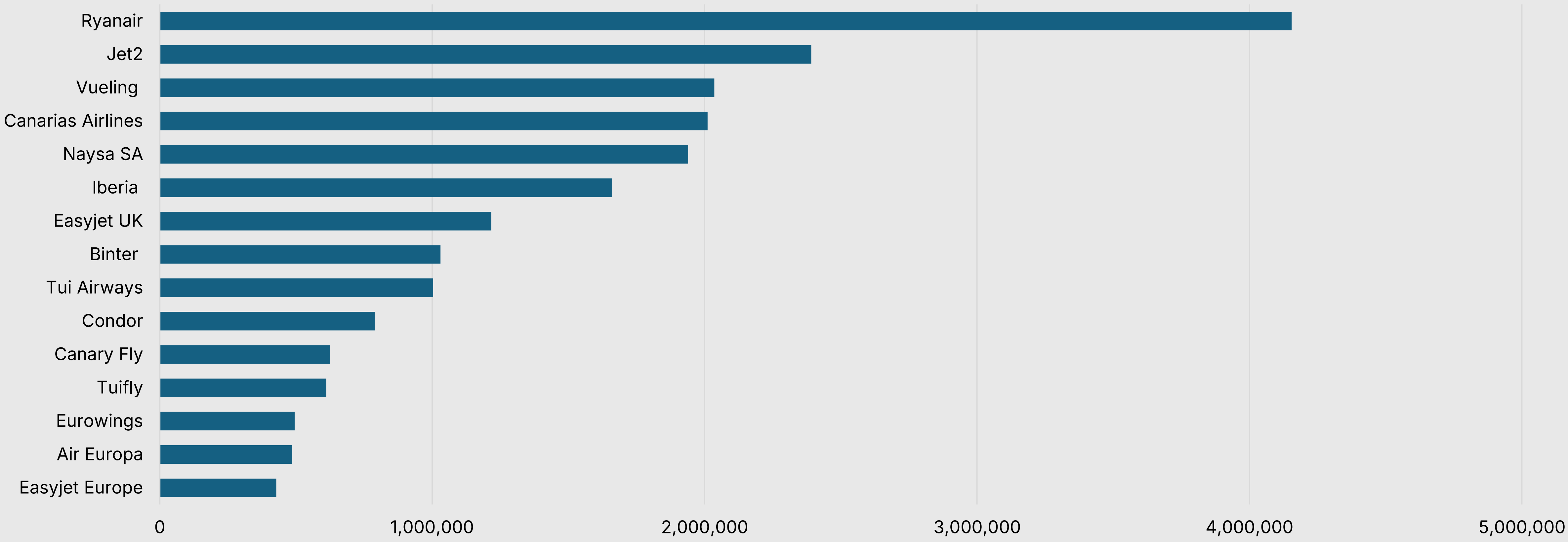
Annual passengers arriving at airports in the Canary Islands by origin



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

In 2024, the airlines with the highest number of passengers arriving at the airports of the Canary Islands were Ryanair, with 4.1 million passengers; Jet2, with 2.3 million; and Vueling, with 2 million. Binter, along with its associated companies Canarias Airlines and Naysa, collectively registered approximately 5 million arrivals. Additionally, Iberia, EasyJet UK, and TUI Airways each surpassed one million arrivals.

Annual passengers arriving at airports in the Canary Islands by airline in 2024



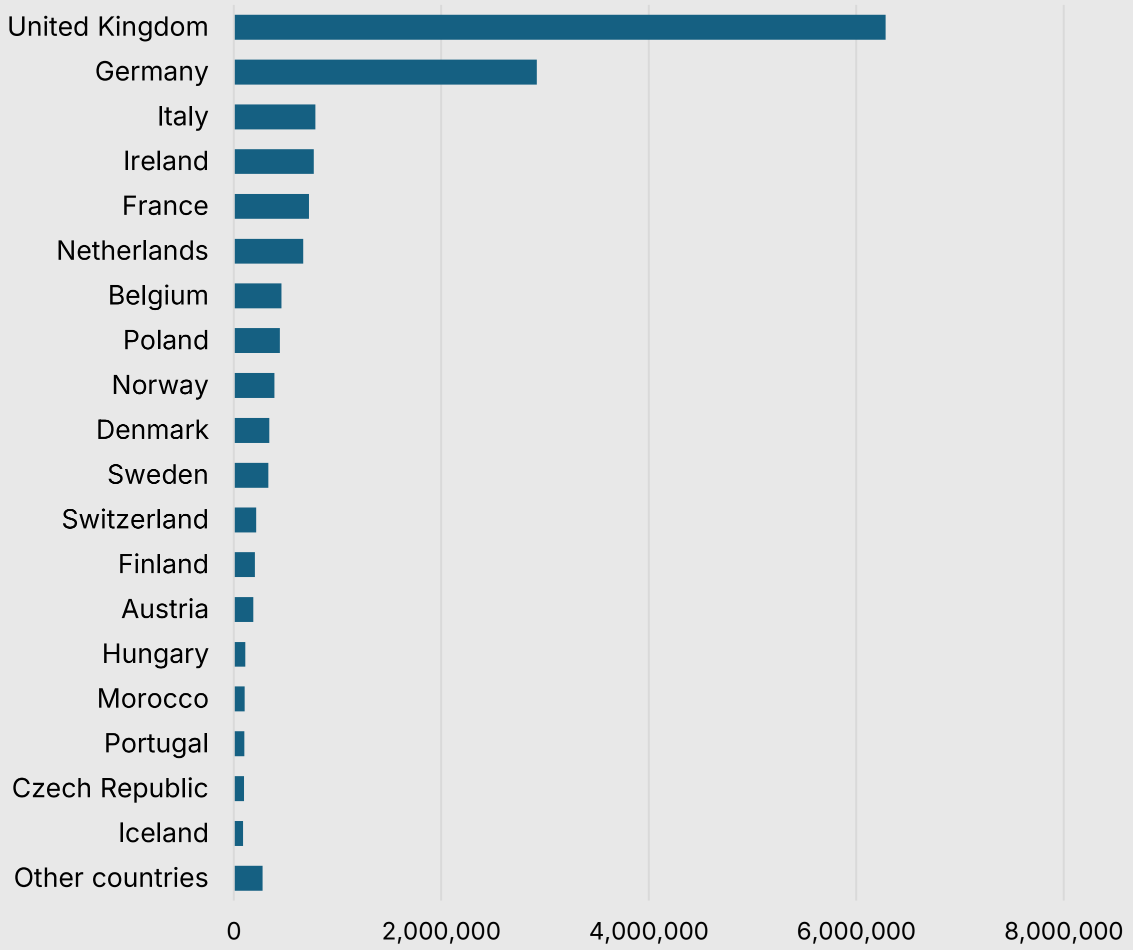
Source: Air Traffic Statistics (Aena)

The United Kingdom clearly leads the ranking of international passengers to the Canary Islands, contributing 6.3 million arrivals in 2024, reaffirming its position as the main tourist source market for the islands. Germany ranks second, though with a significant gap, registering just under 3 million passengers. Together, these two markets represent the core of international tourism in the archipelago.

Italy, Ireland, France, and the Netherlands complete the group of countries with the highest volume of passengers, with numbers ranging from 600,000 to 800,000 arrivals. Ireland's case is particularly notable, despite its smaller population size.

This pattern underscores the need to consolidate emerging markets and reduce the heavy dependence on British and German tourism, especially in a global context marked by potential economic and geopolitical fluctuations that could affect these flows.

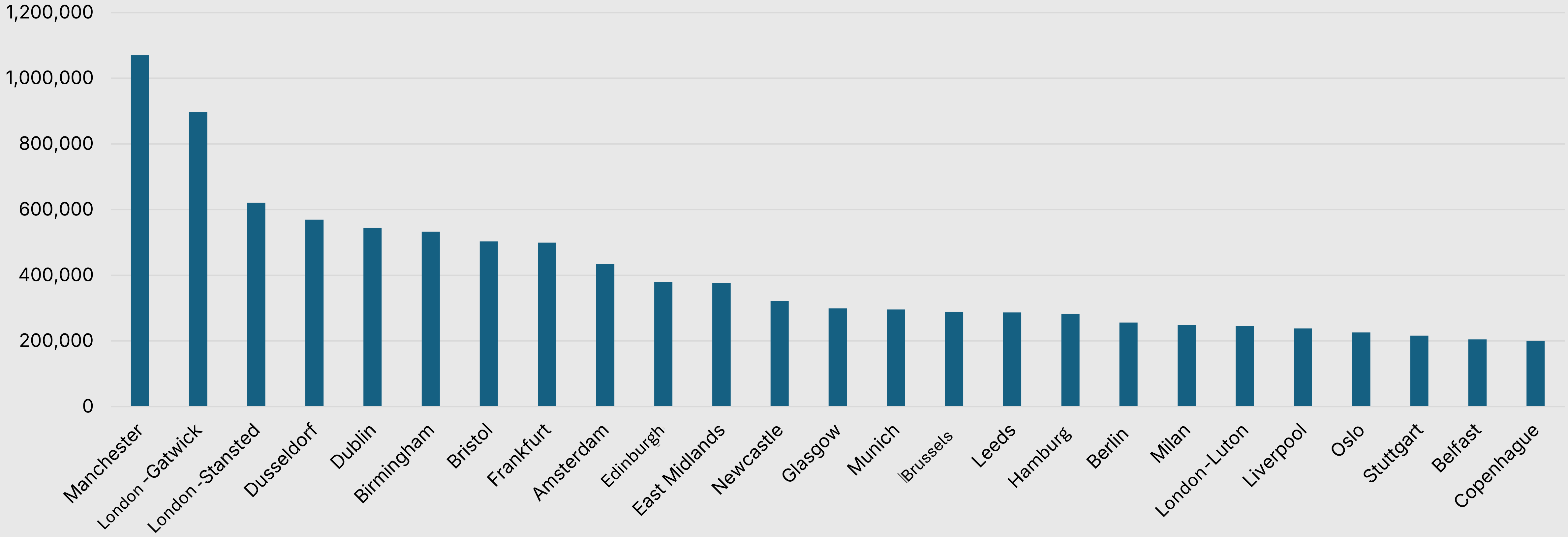
International passengers arriving at airports in the Canary Islands, according to flight origin in 2024



Source: Air Traffic Statistics (Aena)

In 2024, passenger arrivals at the Canary Islands airports from abroad were dominated by routes from the United Kingdom. Manchester was the primary origin point, with 1.1 million passengers, followed by London/Gatwick and London/Stansted. Germany also had a significant presence, with key routes from Düsseldorf, Frankfurt, and Munich.

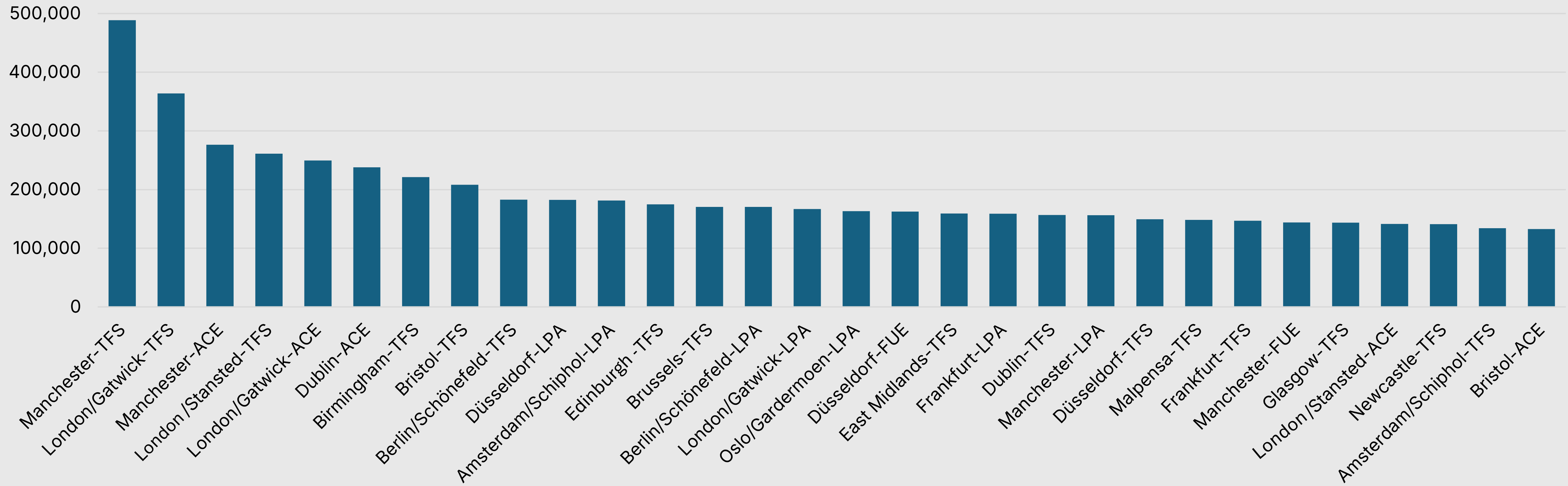
Passenger arrivals at Canary Islands airports from major international airports of origin in 2024



Source: Air Traffic Statistics (Aena)

In 2024, international air routes to the Canary Islands highlight the strong dependence on the British market, with Manchester-TFS leading in passenger arrivals, followed by London Gatwick-TFS and Manchester-ACE. The United Kingdom solidifies its position as the primary source of tourists, with multiple airports among the most active. Germany maintains its key role with connections such as Düsseldorf-LPA and Berlin-TFS, while Ireland and the Netherlands also show a notable presence through routes like Dublin-ACE and Amsterdam-LPA.

Passenger arrivals at Canary Islands airports on major international routes in 2024



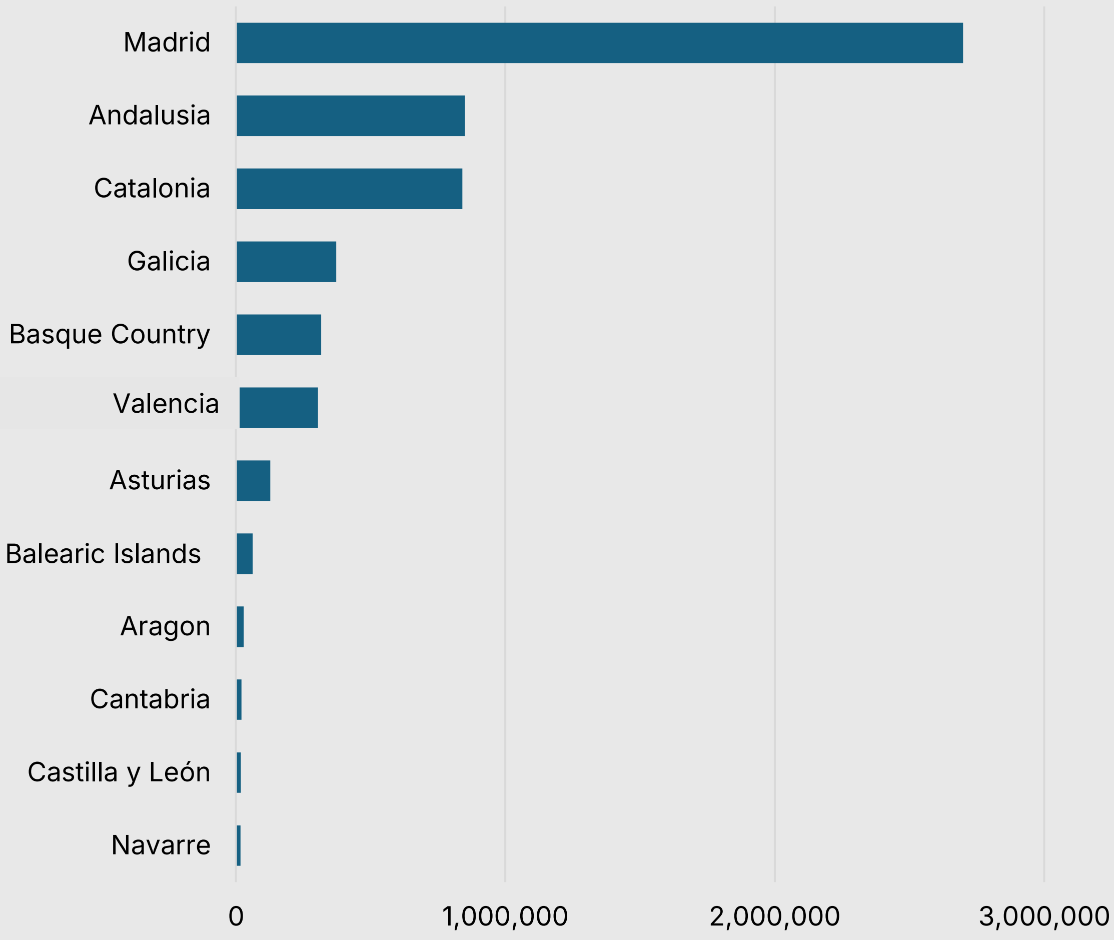
Note: TFS: Tenerife South Airport; LPA: Gran Canaria Airport; ACE: Lanzarote Airport; FUE: Fuerteventura Airport
Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

Madrid clearly leads the arrivals from mainland Spain to the Canary Islands airports in 2024, consolidating its position as the main connection hub to the archipelago. Andalusia and Catalonia follow in importance, with figures around 840,000 arrivals, reflecting the strong air connection between these communities and the Canary Islands.

Galicia, the Basque Country, and Valencia also contribute a significant volume of passengers, although with a relatively smaller share. On the other hand, regions such as Asturias, the Balearic Islands, and Aragón show a more limited contribution, while Cantabria, Castile and León, and Navarre provide only marginal figures.

This pattern underscores the central role of Madrid in air connectivity with the Canary Islands. The concentration is associated with mobility flows between the archipelago and the mainland Spain, taking advantage of Madrid's demographic weight and its transport network. Nevertheless, there remains considerable scope for greater diversification.

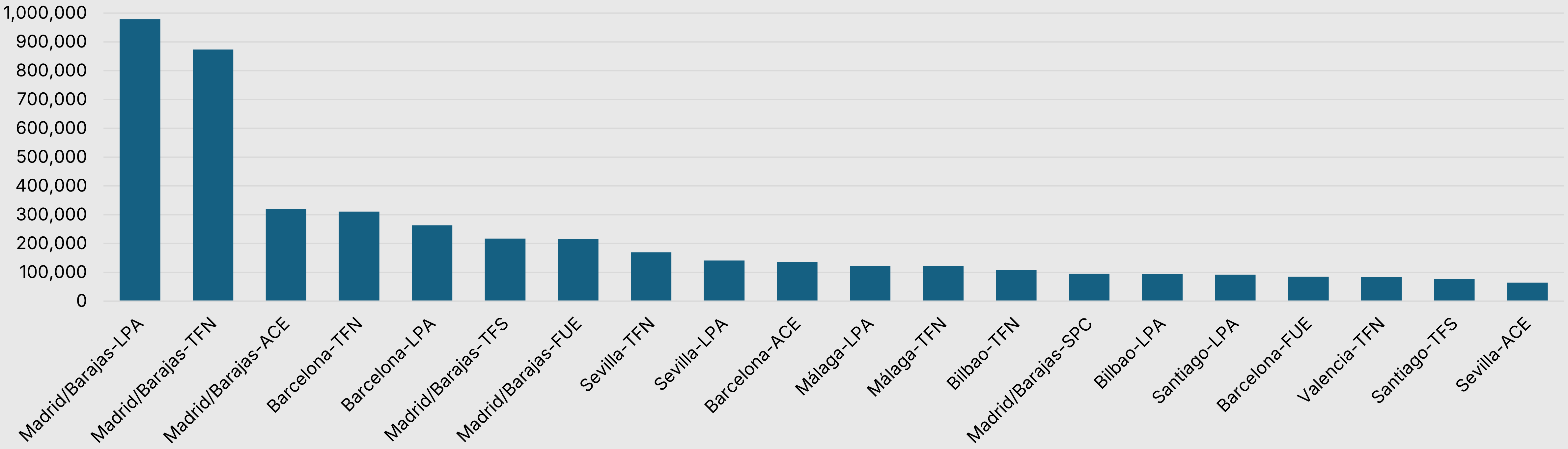
Passengers arriving at Canary Islands airports from mainland airports, according to flight origin in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

The air routes between Madrid-Barajas and the airports of the Canary Islands concentrate a large part of the number of passengers in 2024, highlighting the connections with Gran Canaria (LPA) and Tenerife North (TFN), which far exceed the rest. Barcelona also has a high volume, although much lower than Madrid. Other relevant routes include connections from Seville, Malaga and Bilbao. Among the most prominent routes, excluding the airports of Madrid, Tenerife North and Gran Canaria, are the Barcelona-Lanzarote, Santiago-Tenerife South and Seville-Lanzarote connections.

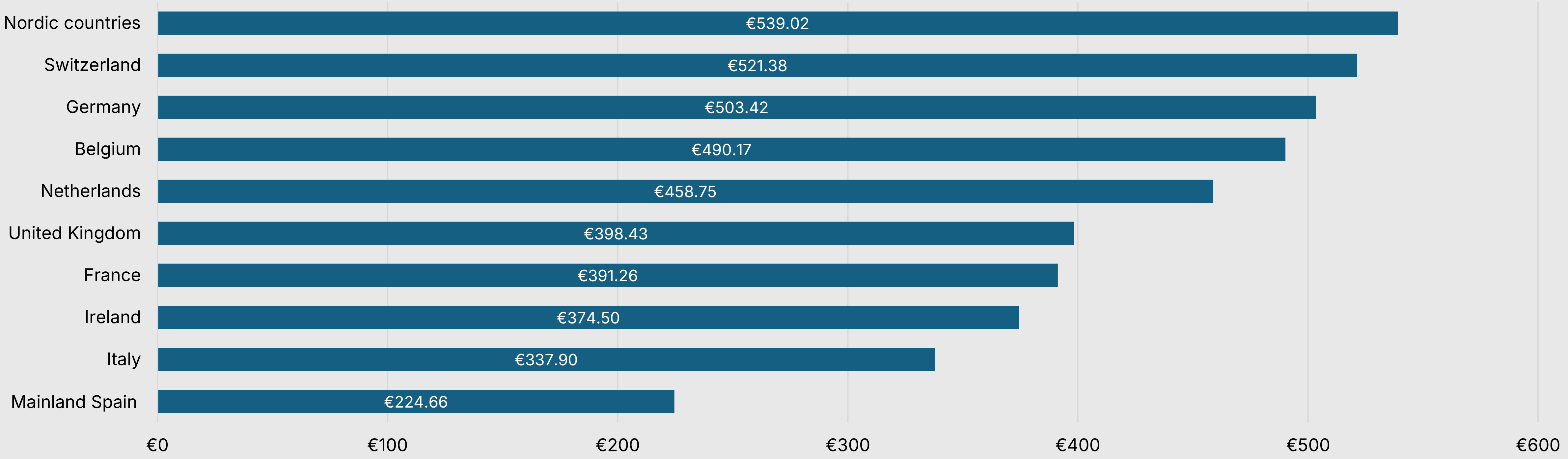
Passenger arrivals at Canary Islands airports on main routes to mainland Spain in 2024



Note: SPC: La Palma Airport; TFS: Tenerife South Airport; TFN: Tenerife North Airport; LPA: Gran Canaria Airport; ACE: Lanzarote Airport; FUE: Fuerteventura Airport. Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

The spending on air transport to the Canary Islands in 2024 shows notable differences depending on the nationality of the tourists. Visitors from the Nordic countries lead the ranking with an average expenditure of 539 euros, followed by the Swiss (521 euros) and Germans (503 euros), reflecting the greater distance and higher fares. Belgium and the Netherlands also show high figures, exceeding 450 euros. In contrast, British tourists report a slightly lower average expenditure (398 euros), as do the French (391 euros) and Irish (375 euros). Italy ranks even lower at 338 euros, while travellers from the mainland stand out with the lowest average cost (225 euros), reflecting the geographical proximity. In any case, further investigation is needed to determine whether the price faced by mainland tourists when traveling to the Canary Islands is affected by the 75% fare subsidy for residents.

Expenditure on air transport to the Canary Islands by tourist according to place of residence in 2024

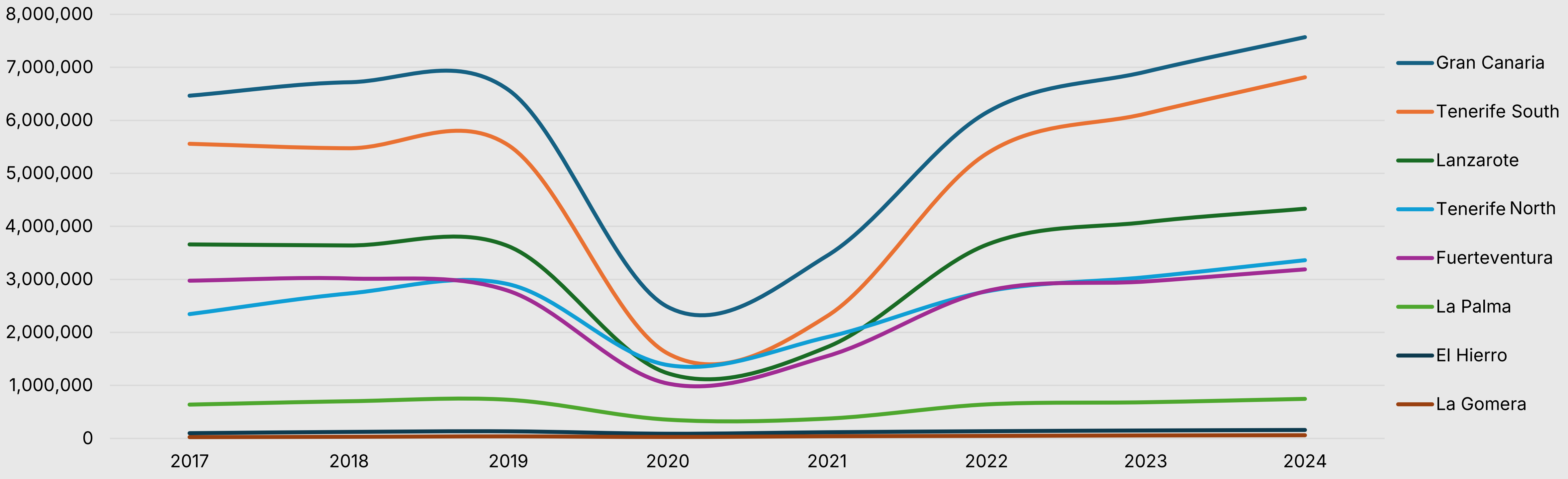


Source: Survey on Tourist Expenditure (ISTAC)

Connectivity of the main airports

Gran Canaria and Tenerife South stand out as the main airports, surpassing seven million passenger arrivals in 2024. The health crisis of 2020 caused a sharp drop in arrivals. However, from 2021 onwards, a steady recovery is observed, reaching figures in 2024 that exceed pre-pandemic levels. Airports such as La Palma show a slower recovery, influenced by factors such as the 2021 volcanic eruption and the reduced significance of international arrivals. Although not visible in the chart, El Hierro and La Gomera have also shown significant growth, focused on the inter-island market.

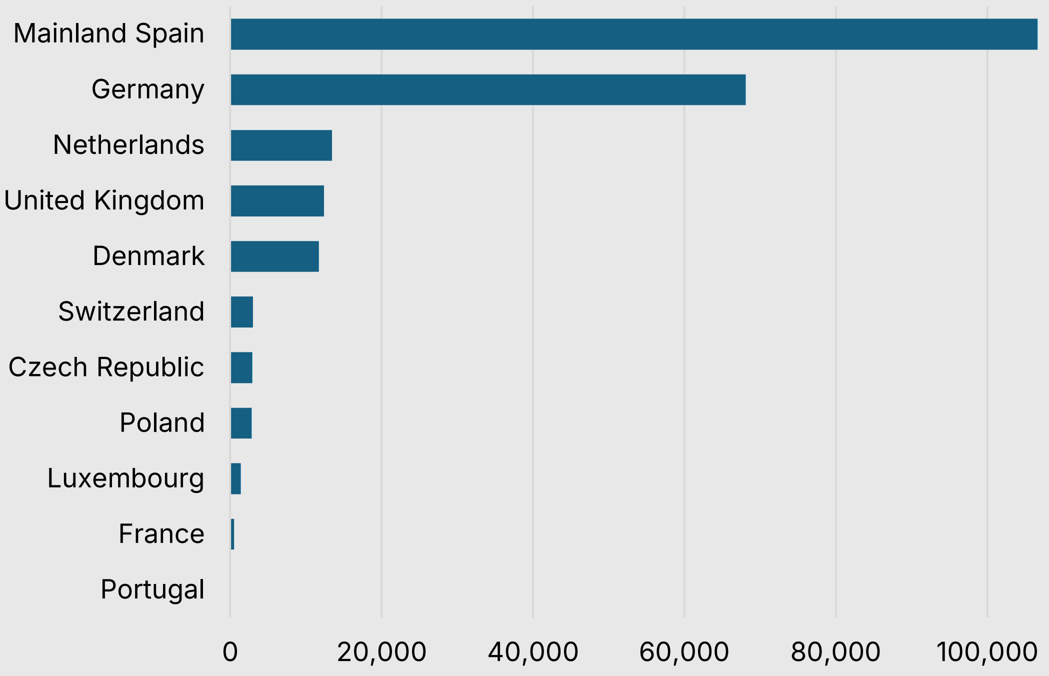
Annual passengers arriving at airports in the Canary Islands



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

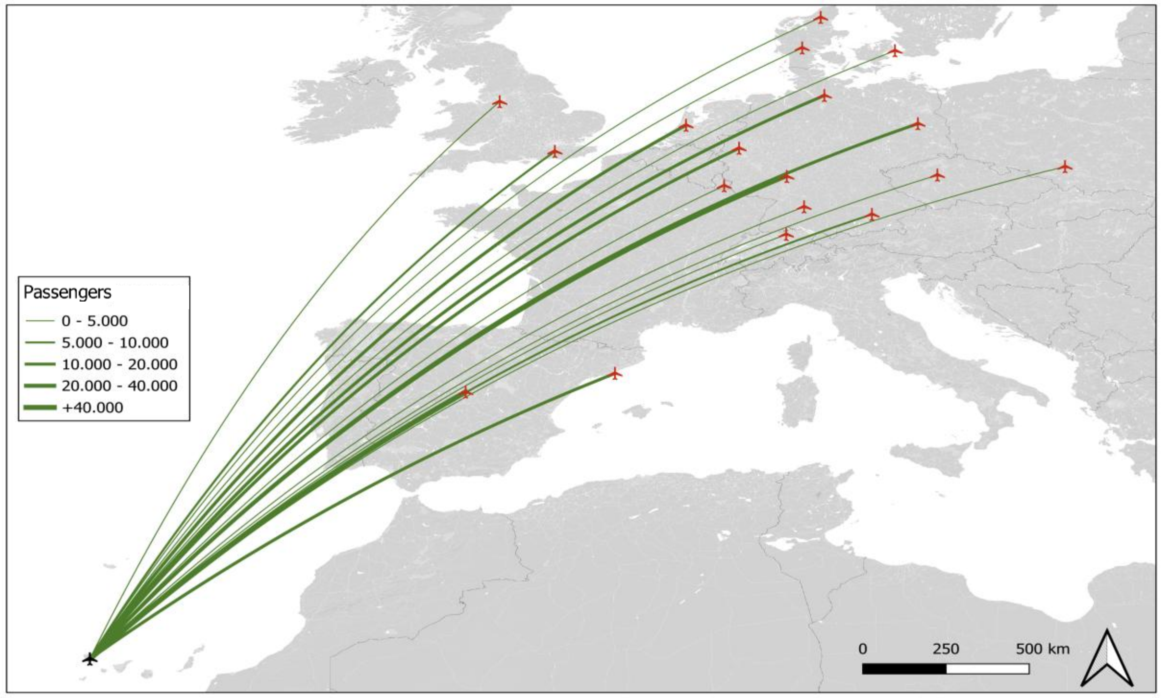
La Palma Airport maintains connectivity primarily with the mainland, recording over 100,000 arrivals in 2024. Internationally, Germany is the most significant market for the island, with nearly 70,000 passengers. Other countries such as the Netherlands, the United Kingdom, and Denmark also contribute with significant flows, although to a lesser extent. The limited air connectivity of La Palma remains a key factor in the island's tourism stagnation following the volcanic eruption of 2021.

La Palma Airport: Passengers from the mainland and abroad in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

Main air routes to La Palma airport from the mainland and abroad. Routes with more than 1,000 passengers in 2024

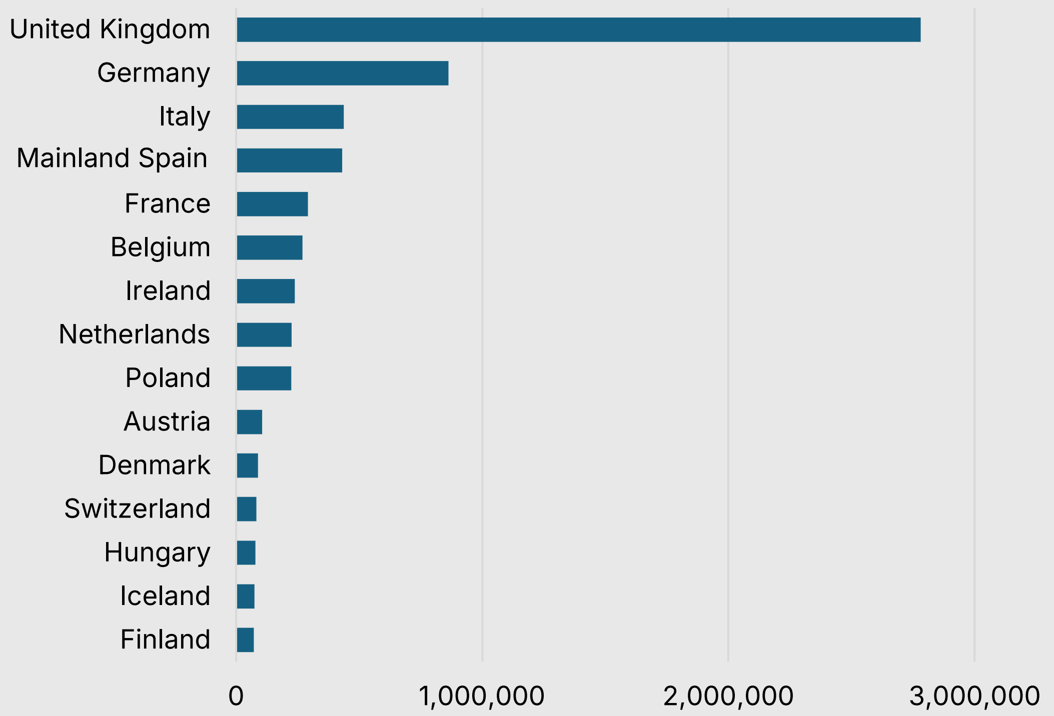


Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

Tenerife South Airport has consolidated its position as an important international hub, with the United Kingdom as the leading source market in 2024, significantly surpassing other countries. Germany ranks second, followed by Italy, the mainland, and France. The map highlights the density of routes to Western Europe and the key role of British and German cities.

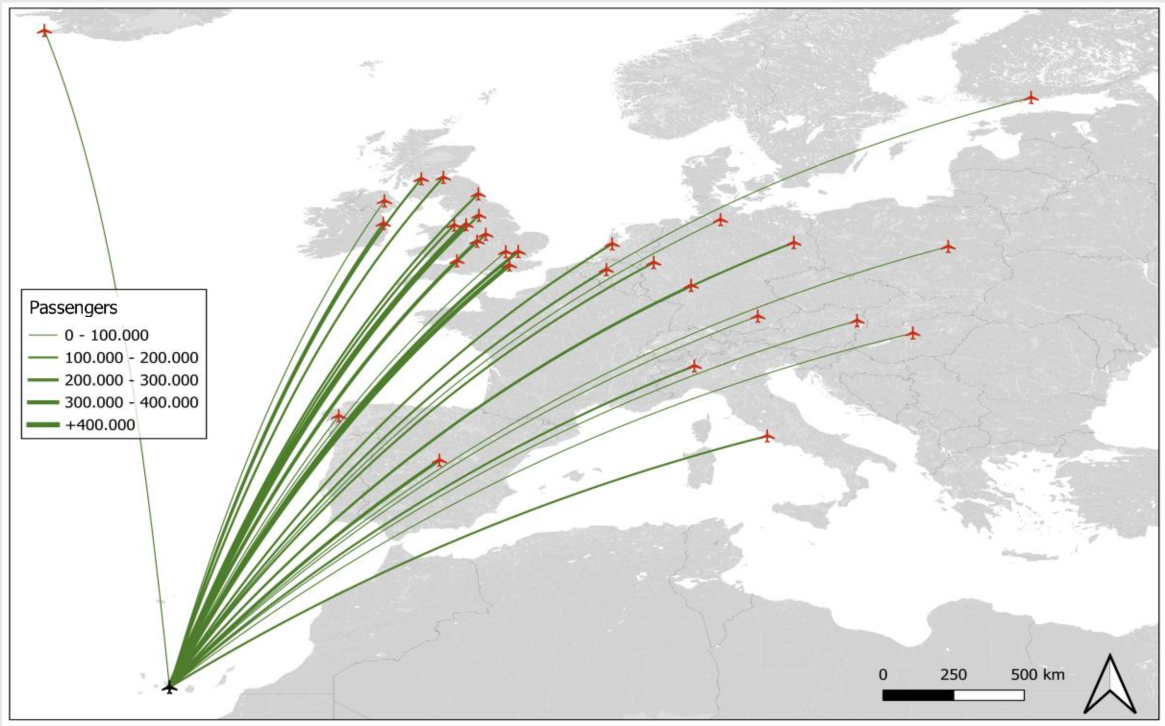
Additionally, connectivity with mainland airports emphasizes the importance of national tourism. The Netherlands, Belgium, and Ireland also maintain significant flows, while routes from Poland, Austria, and the Nordic countries further diversify the arrival of tourists.

Tenerife South Airport: Passengers from mainland Spain and abroad in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

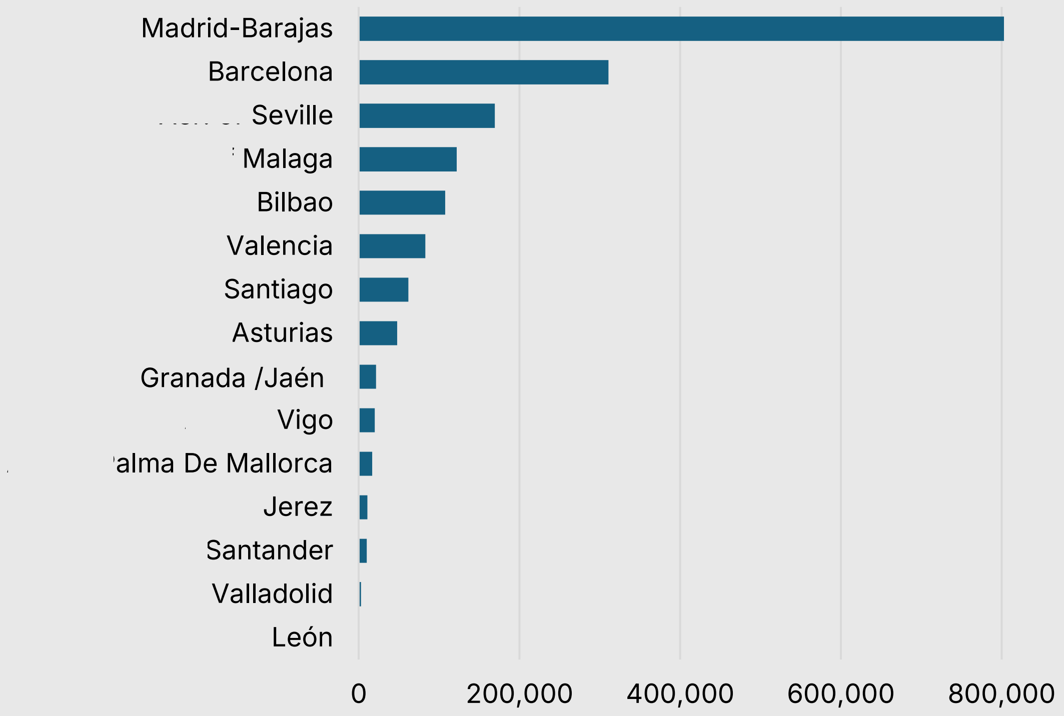
Main air routes to Tenerife South airport from the mainland and abroad. Routes with more than 1,000 passengers in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

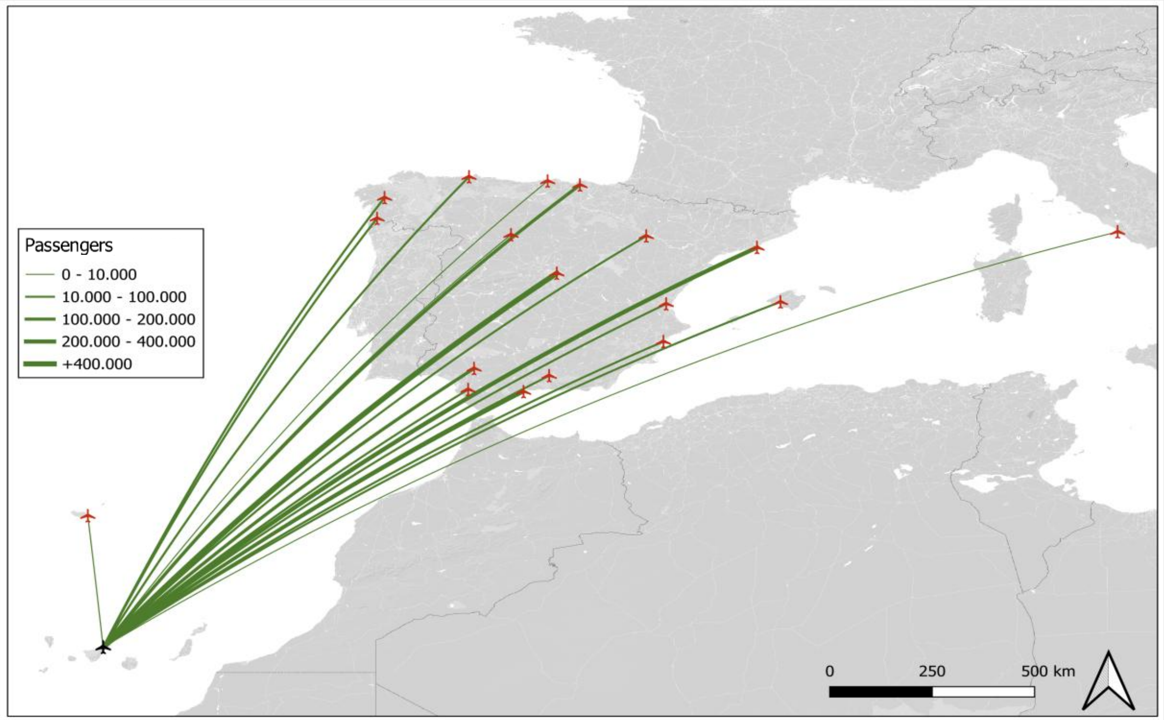
Tenerife North Airport clearly shows a predominance of domestic traffic within Spain, with Madrid-Barajas as the main connection, surpassing all other mainland airports. Barcelona ranks second, followed by Sevilla, Bilbao, Valencia, and Santiago, establishing links with the major urban hubs of Spain. The map highlights the strong network of domestic flights to Tenerife North, primarily focused on the Iberian Peninsula. While international traffic is limited, it is noteworthy that there is a significant connection with Venezuela, absent in the map, with 12,521 passengers.

Tenerife North Airport: Passengers arriving from mainland airports in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

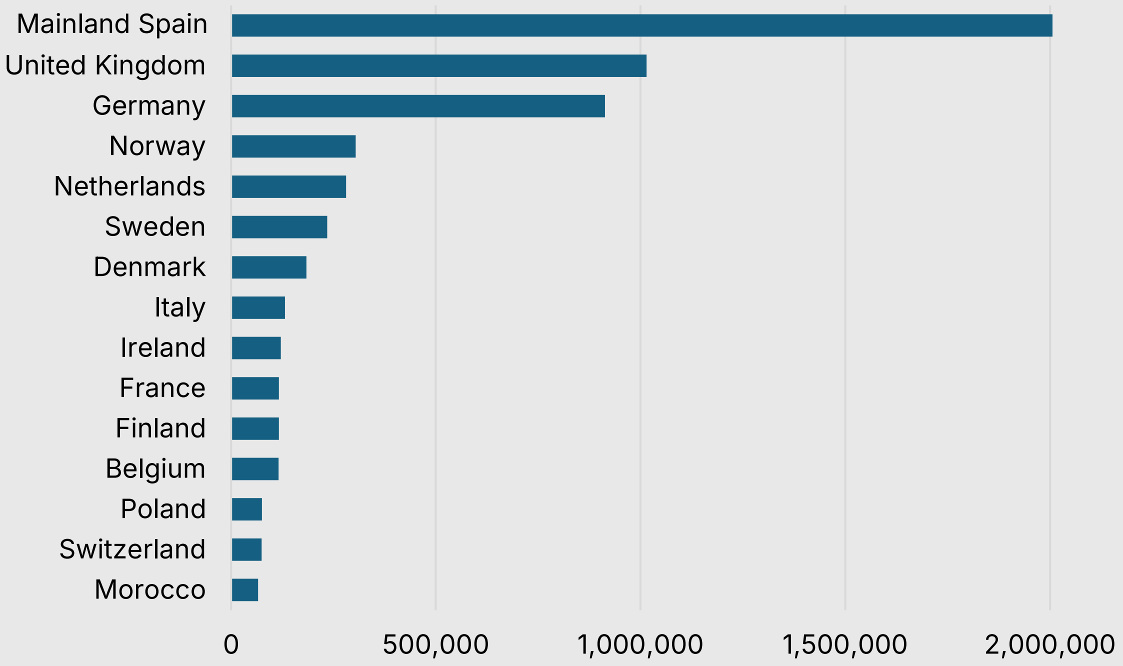
Main air routes to Tenerife North airport from the mainland and abroad. Routes with more than 1,000 passengers in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

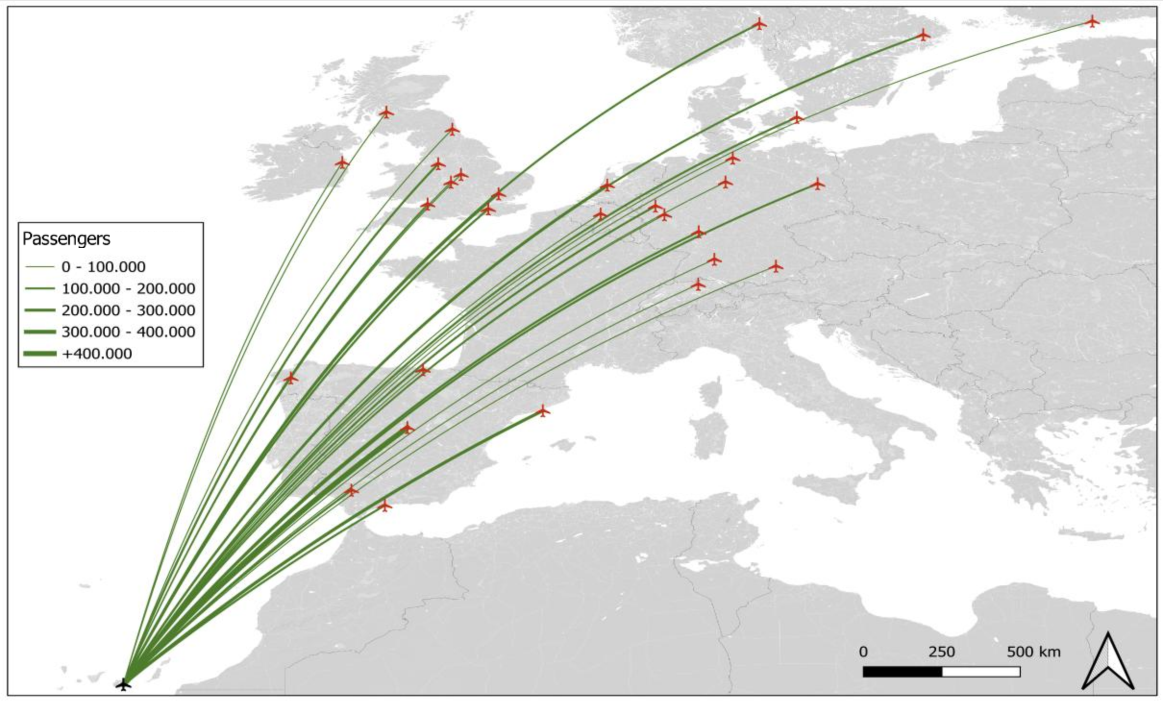
Gran Canaria Airport stands out for its high air connectivity, being one of the main hubs of the archipelago. In 2024, the majority of passengers came from mainland Spain, followed by flows from the United Kingdom and Germany, the main international source markets. Additionally, the airport shows notable diversification towards Nordic countries such as Norway, Sweden, and Denmark, as well as the Netherlands and Italy.

Gran Canaria Airport: Passengers from mainland Spain and abroad in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

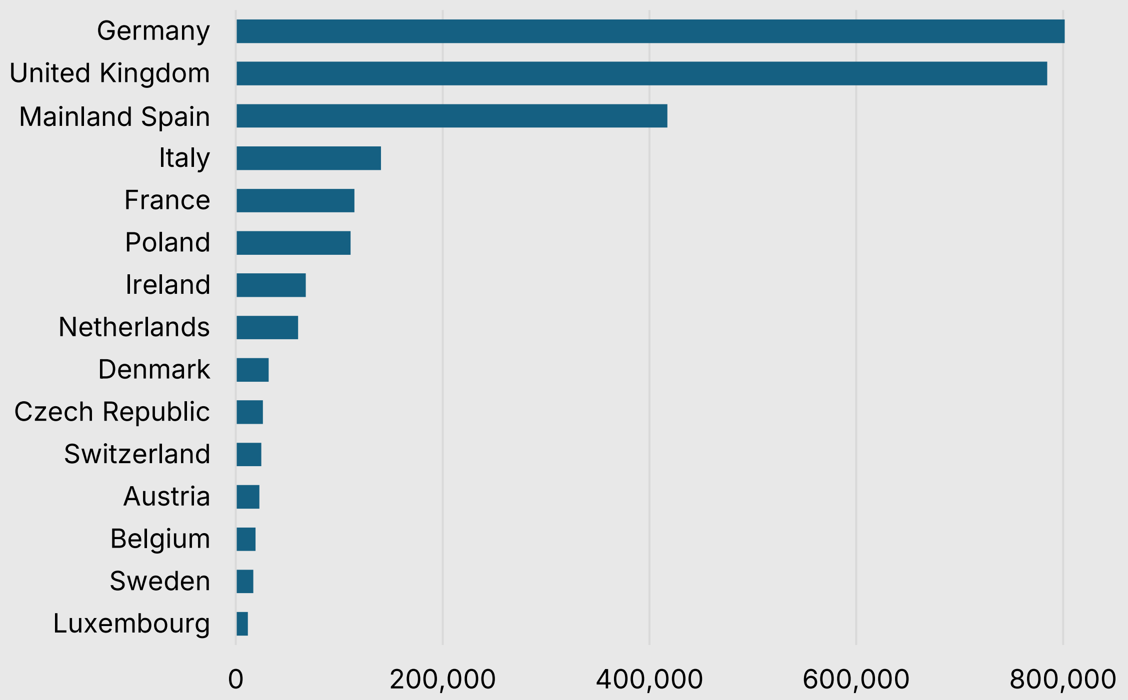
Main air routes to Gran Canaria airport from the mainland and abroad. 30 routes with the most passengers in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

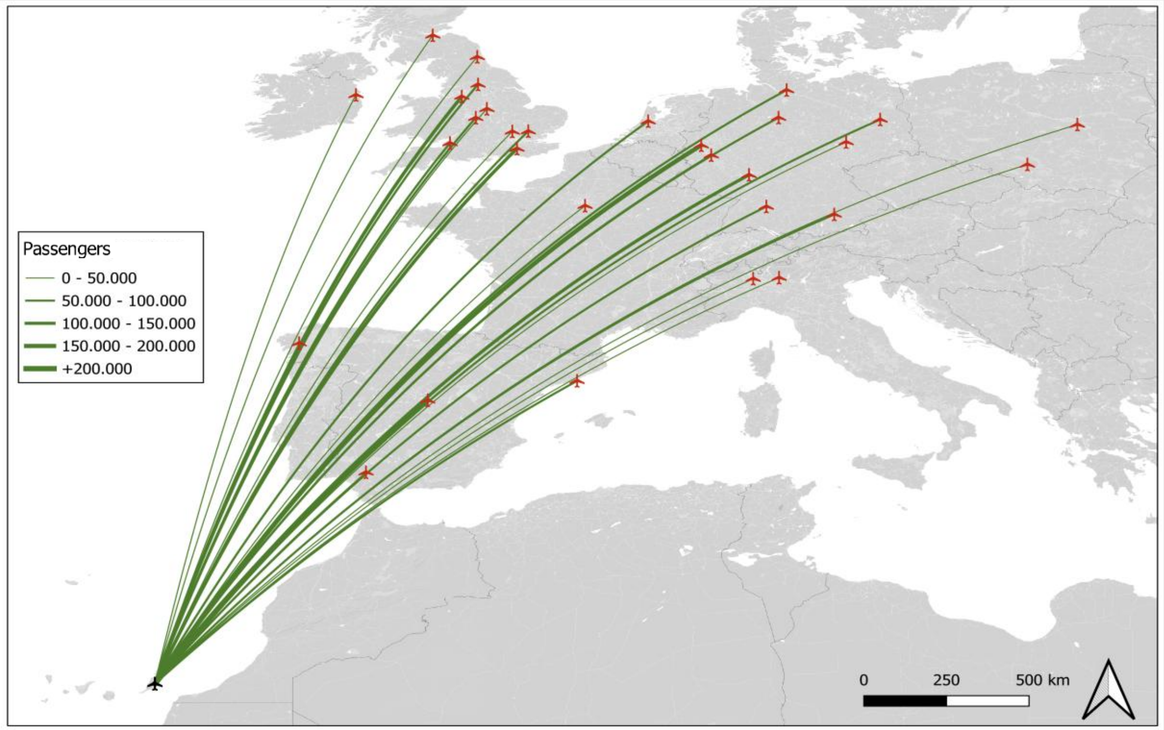
Fuerteventura Airport shows notable diversification in its air connections in 2024, with Germany and the United Kingdom as its main international source markets, with similar and significantly higher figures compared to others. The peninsula ranks third, consolidating its role as a key national link. Additionally, there is a significant presence of passengers from Italy, France, and Poland, strengthening connectivity with Central and Eastern Europe.

Fuerteventura Airport: Passengers from the mainland and abroad. 15 countries with the most passengers in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

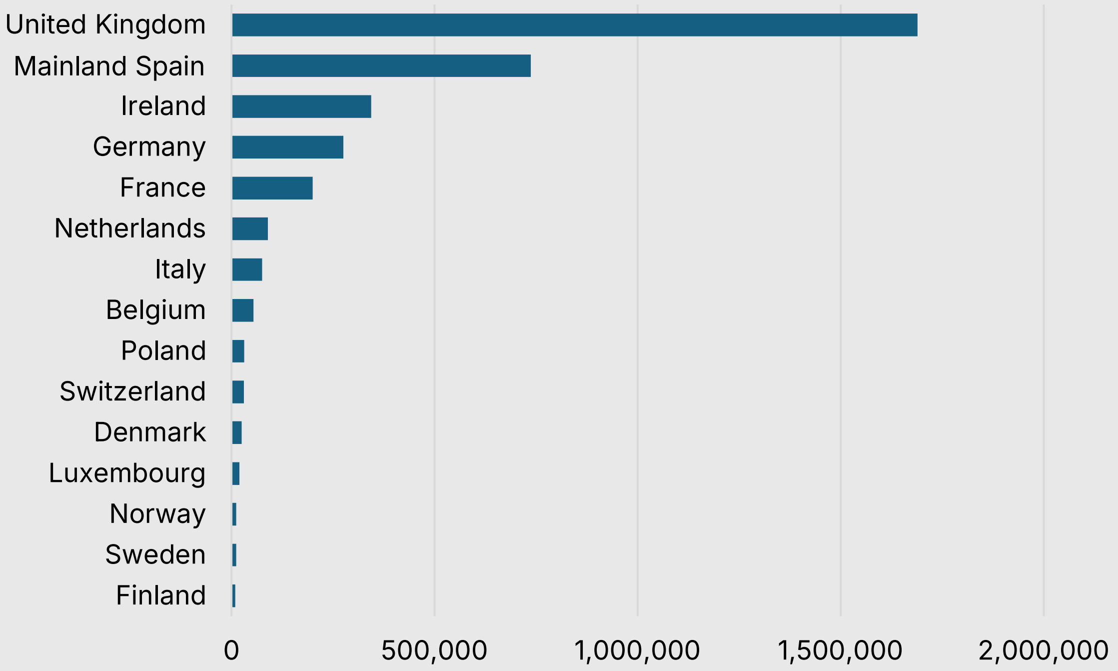
Main air routes to Fuerteventura airport from the mainland and abroad. 30 routes with the most passengers in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

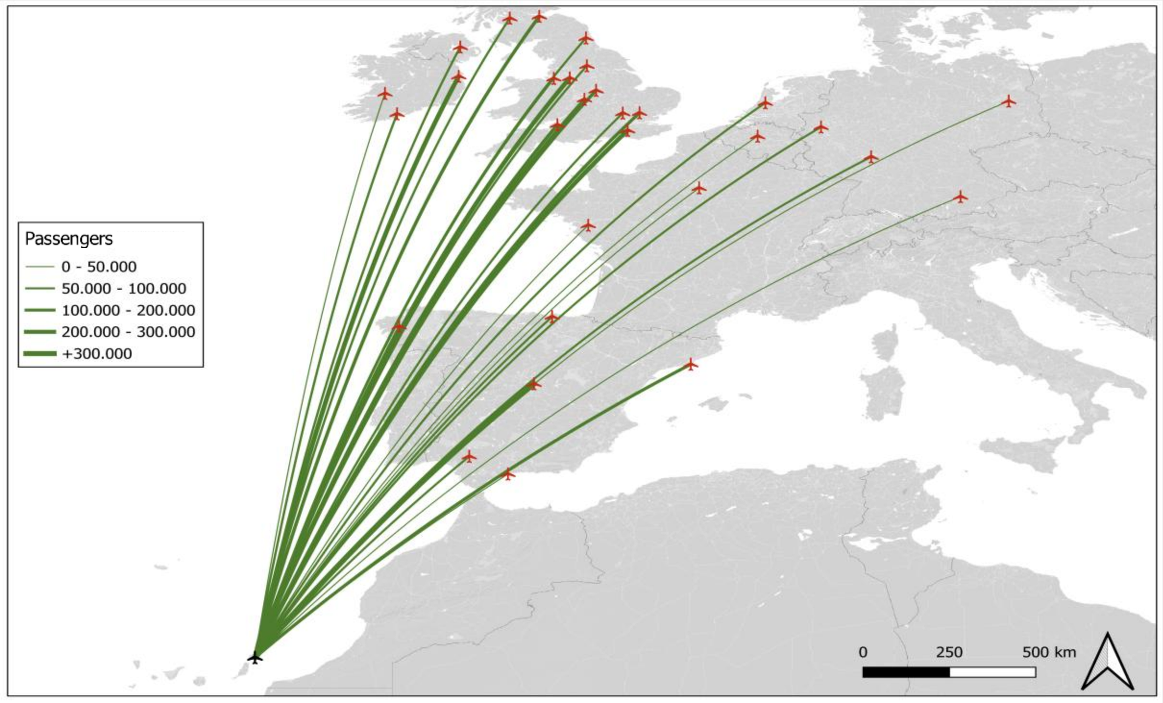
In 2024, Lanzarote Airport shows a clear dominance of the British market, leading by a wide margin over other source countries. The Spanish mainland ranks second, followed by Ireland, Germany, and France, further consolidating its strong connection with Europe. The map highlights the concentration of routes from the United Kingdom and Ireland, as well as significant connections with Germany and France.

Lanzarote Airport: Passengers from mainland Spain and abroad in 2024



Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

Main air routes to Lanzarote airport from the mainland and abroad. 30 routes with the most passengers in 2024

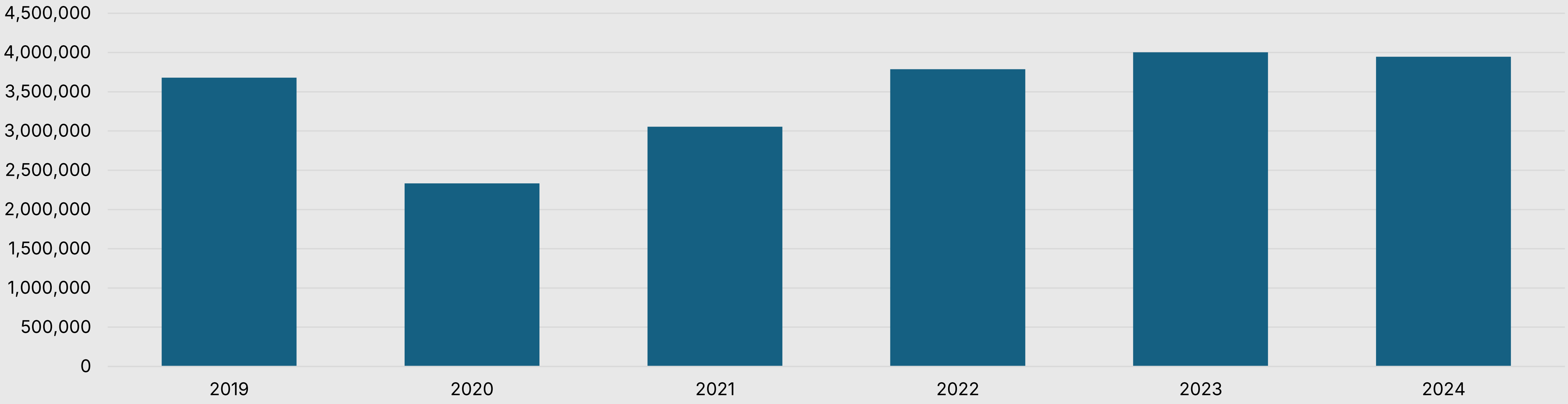


Source: Air Traffic Statistics (Aena). Data extracted from ISTAC

Inter-island maritime connectivity

Between 2019 and 2024, passenger traffic at the Canary Islands' state-owned ports (excluding cruise passengers) shows a clear recovery after the pandemic's impact in 2020, which saw the lowest number of passengers, just over 2 million. Since then, the data reveal a growing trend, peaking in 2023 with 4 million passengers, followed by a slight correction in 2024. This recovery reflects the revitalization of inter-island and mainland maritime transport, surpassing pre-pandemic figures and highlighting the strategic role of maritime transport on certain tourist routes in the Canary Islands

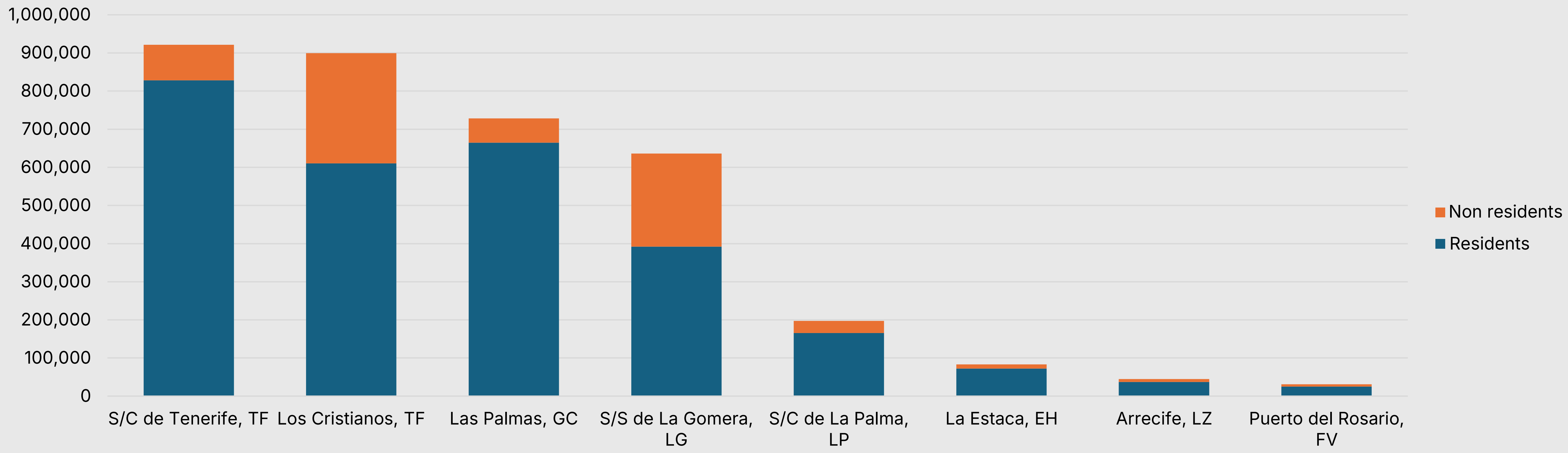
Arrival of passengers at state-owned ports of the Canary Islands



Note: Cruise passengers excluded. Source: Port Authority of Santa Cruz de Tenerife and Port Authority of Las Palmas

In 2024, the ports of Santa Cruz de Tenerife and Los Cristianos led passenger traffic in the ports of the Canary Islands. Santa Cruz de Tenerife records the highest influx of residents in Spain, while Los Cristianos concentrates a higher percentage of non-residents due to its connection with other ports such as La Gomera. Las Palmas de Gran Canaria also shows significant traffic, mostly from residents. In the case of Gran Canaria, arrivals at Agaete are not recorded, as it is a port under the management of the autonomous community. Similarly, the crossings between Playa Blanca and Morro Jable, or from Órzola to La Graciosa, are not included in this graph for the same reason. San Sebastián de La Gomera presents a notable presence of non-residents, driven by the route with Los Cristianos.

Passengers arriving at state-owned ports of the Canary Islands in 2024

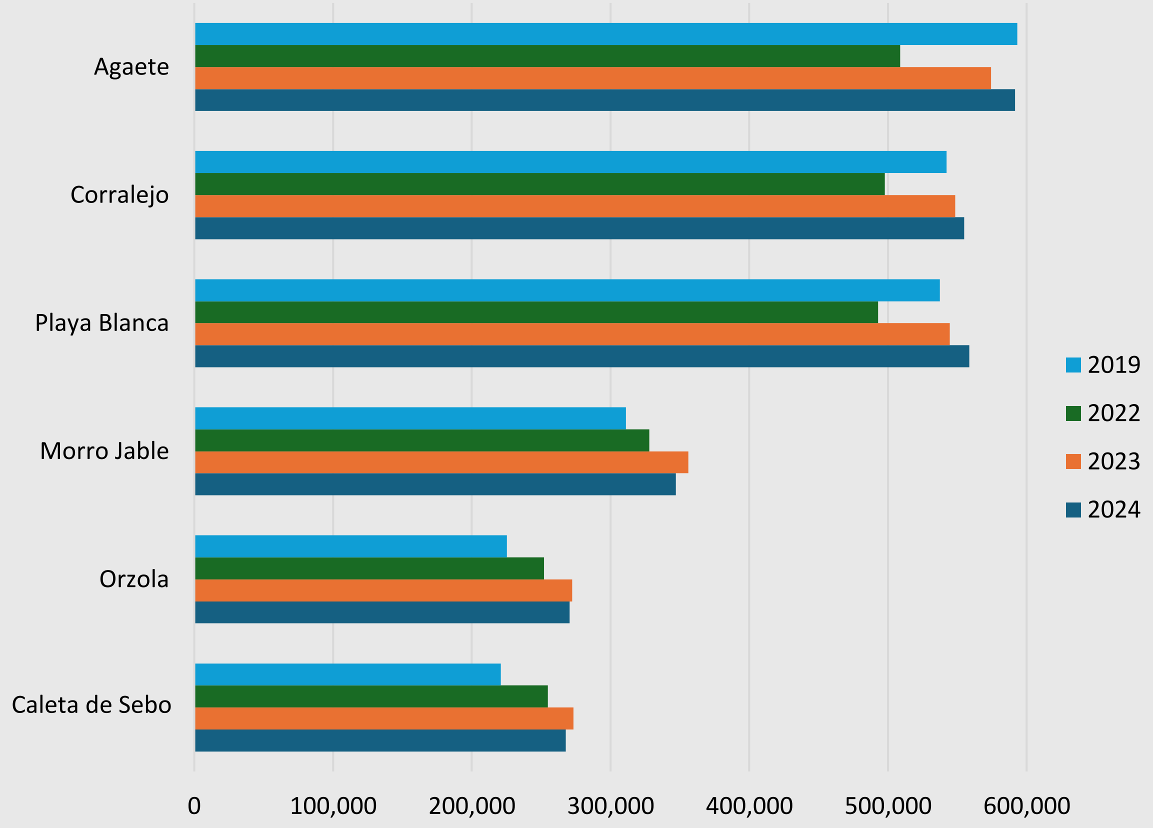


Note: Cruise passengers excluded. EH: El Hierro; LP: La Palma; LG: La Gomera; TF: Tenerife; GC: Gran Canaria; FV: Fuerteventura; LZ: Lanzarote
Source: Port Authority of Santa Cruz de Tenerife and Port Authority of Las Palmas

Among the ports dependent on the autonomous community, Agaete, Corralejo, and Playa Blanca stand out for their high number of passengers, each surpassing half a million arrivals. These ports have become key nodes in inter-island connections, serving both residents and tourists.

The ports of Caleta de Sebo and Órzola reflect the constant mobility to and from La Graciosa, while Morro Jable maintains stable figures connecting Fuerteventura and Gran Canaria. It is noteworthy that, on La Graciosa, an island with only 723 inhabitants (INE, 2023), more than 250,000 passengers are received annually.
Overall, there has been a recovery after the pandemic, with some figures in 2024 surpassing the 2019 records.

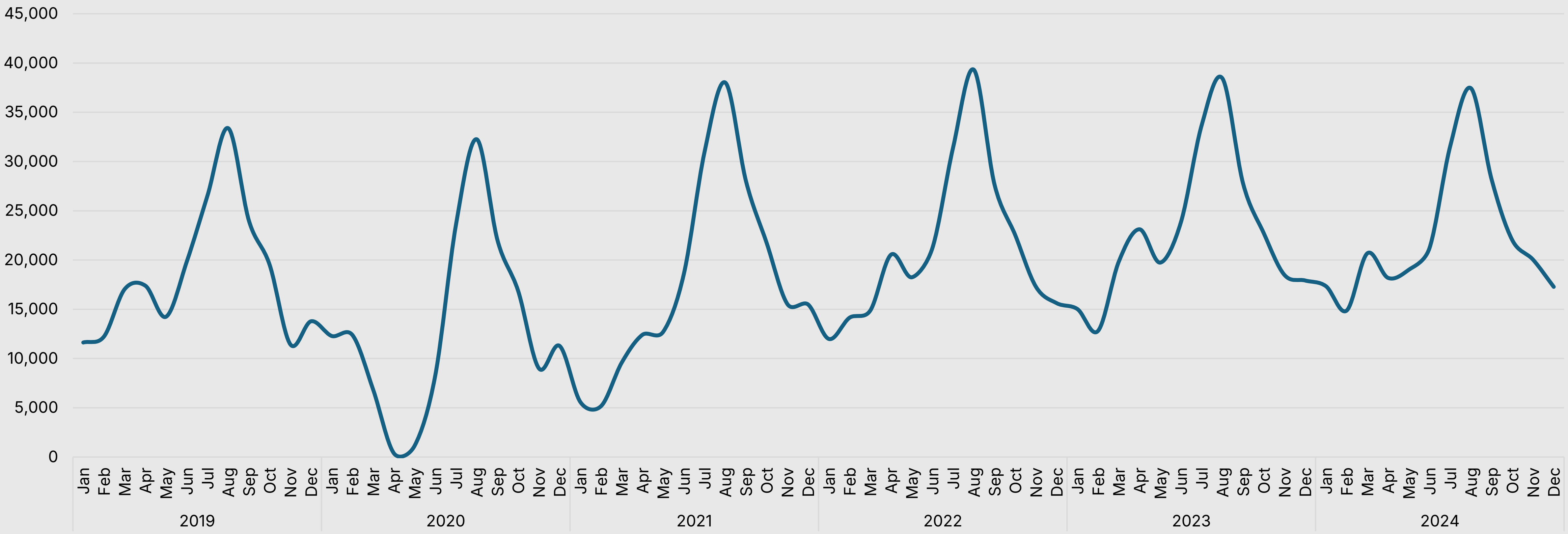
Passengers arriving at the main ports of the autonomous region of the Canary Islands



Source: Puertos Canarios (Government of the Canary Islands)

The monthly evolution of passenger arrivals at the Port of Caleta de Sebo in La Graciosa between 2019 and 2024 reflects a marked seasonality, with peaks of influx during the summer months (July-September), coinciding with the holiday period, and to a lesser extent, also showing increases during Easter Week. These figures highlight the need for managing tourist flows to the island in line with existing infrastructure, ensuring sustainability in the medium and long term.

Monthly passenger arrivals at the port of Caleta de Sebo (La Graciosa)



Source: Puertos Canarios (Government of the Canary Islands)

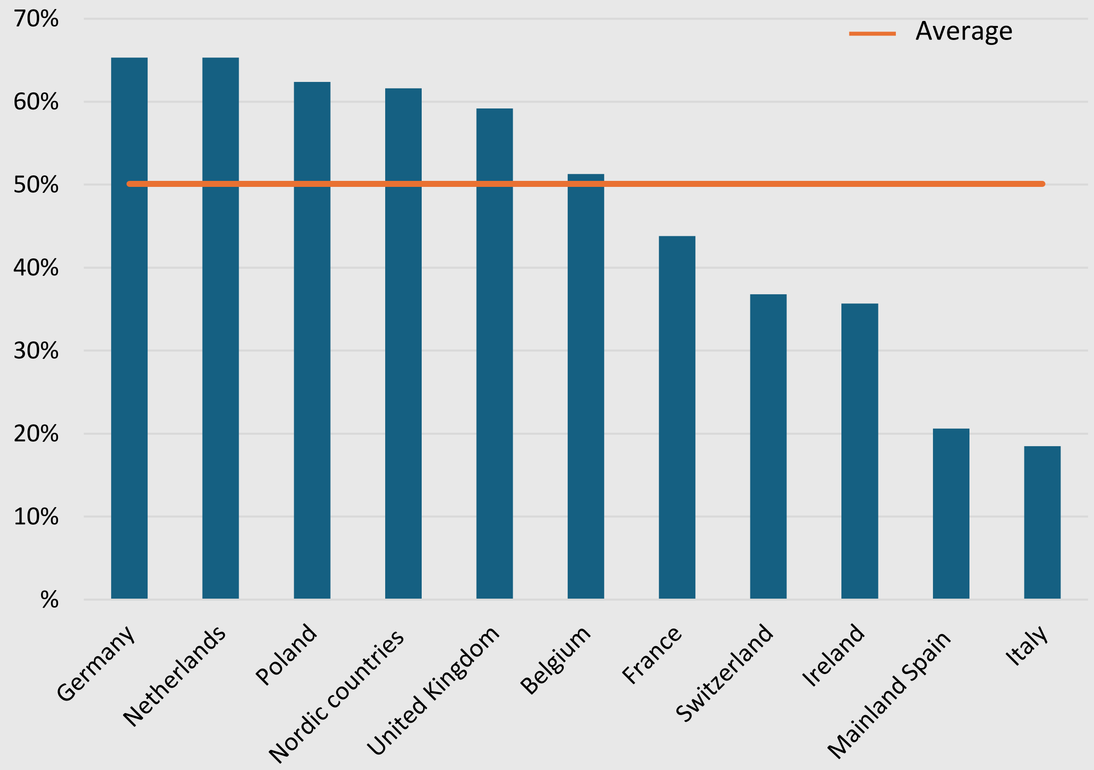
Tourism intermediation in the Canary Islands

The tourist market in the Canary Islands continues to be characterized by a strong dependence on traditional intermediaries, with a high percentage of visitors traveling through package holidays. In 2024, half of the tourists arriving in the archipelago did so under this model, and in recent years, this percentage has even increased. This phenomenon is striking when compared to the global trend, where the use of package holidays has generally declined in recent decades due to the rise of digitalization and the growing preference for independent travel.

The consolidation of package holidays in the Canary Islands is largely driven by the importance of key source markets such as Germany, the Netherlands, Poland, and the Nordic countries, whose tourists opt for this model more than 60% of the time. In contrast, tourists from mainland Spain and Italy present much lower percentages, with only about 20%, indicating different consumption patterns depending on the country of origin. This high level of intermediary involvement has direct implications for sector planning and management, as it facilitates greater predictability in tourist flows and hotel occupancy but also limits the ability to diversify the offer and may reduce the economic impact on other local sectors outside of traditional operator circuits.

In a context of digital transformation and changes in global tourism demand, the resilience of package tourism in the Canary Islands presents both opportunities and challenges. On the one hand, it offers greater destination stability and loyalty from key markets; on the other, it may make it harder to adapt to newer travel trends that are more flexible and experiential.

Percentage of tourists travelling to the islands with a package tour by place of residence in 2024



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

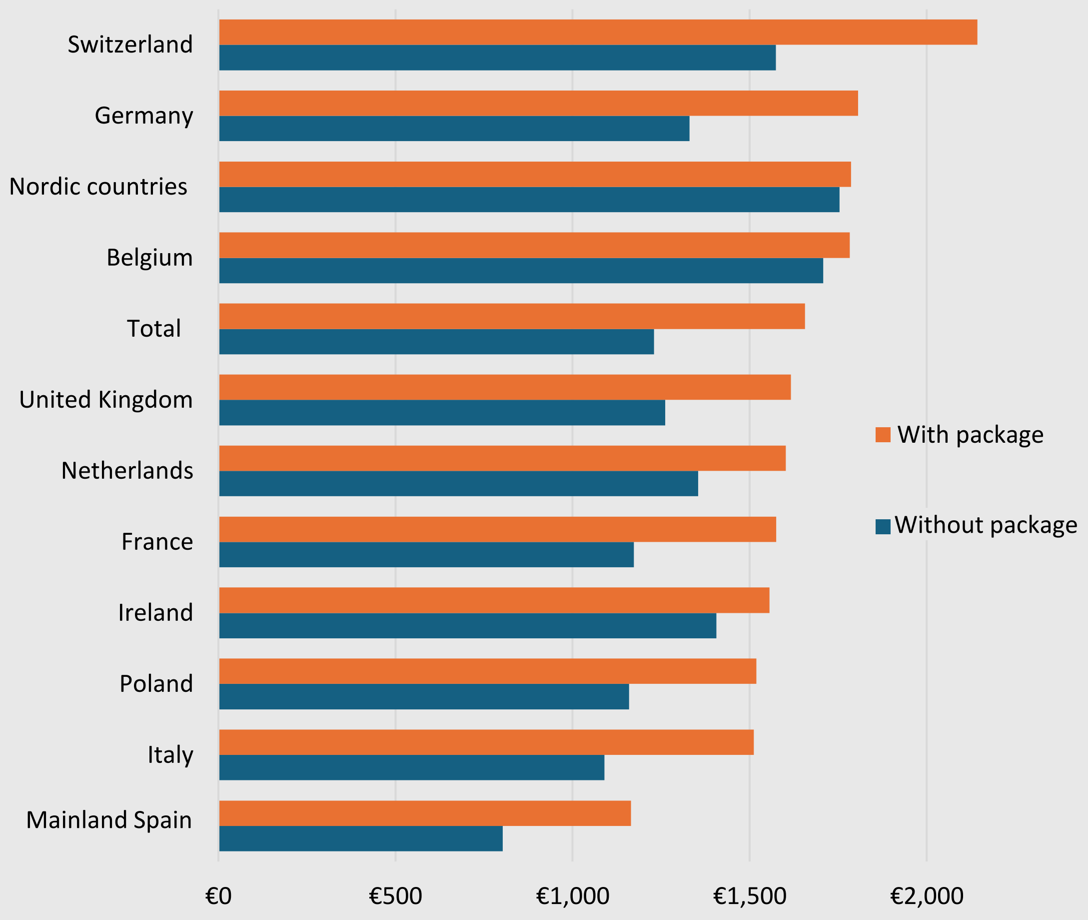
As a general rule, tourists who travel with a package holiday tend to spend more than those who choose to travel independently. In most cases, the differences are substantial, with the exception of tourists from the Nordic countries, Belgium, and Ireland, where the differences are smaller.

Swiss tourists who travel with a package holiday are the highest spenders among those visiting the islands, with an average expenditure of over €2,100, followed by tourists from the Nordic countries and Germany. However, among those who travel independently, the Nordic countries and Belgium lead in spending.

At the other end of the spectrum, tourists from Poland and Italy exhibit lower spending, both with and without a package.

Finally, it is worth noting that tourists from mainland Spain have the lowest spending compared to international markets, although this is influenced by the fact that their average stay tends to be shorter.

Expenditure per trip by tourists according to the use of tourist packages in 2024

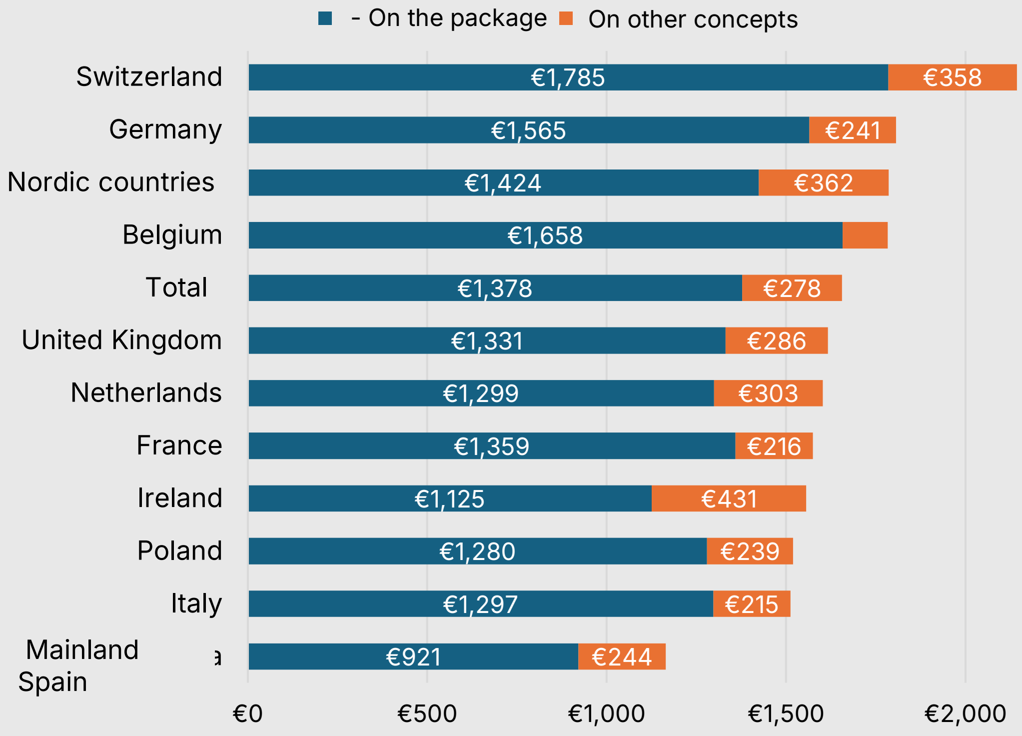


Source: Puertos Canarios (Government of the Canary Islands)

Among tourists who decide to visit the Canary Islands with a package holiday, residents of Switzerland, Belgium, and Germany are the highest spenders on the package itself. In contrast, Ireland and the Nordic countries, according to the Tourist Expenditure Survey, spend more on other aspects.

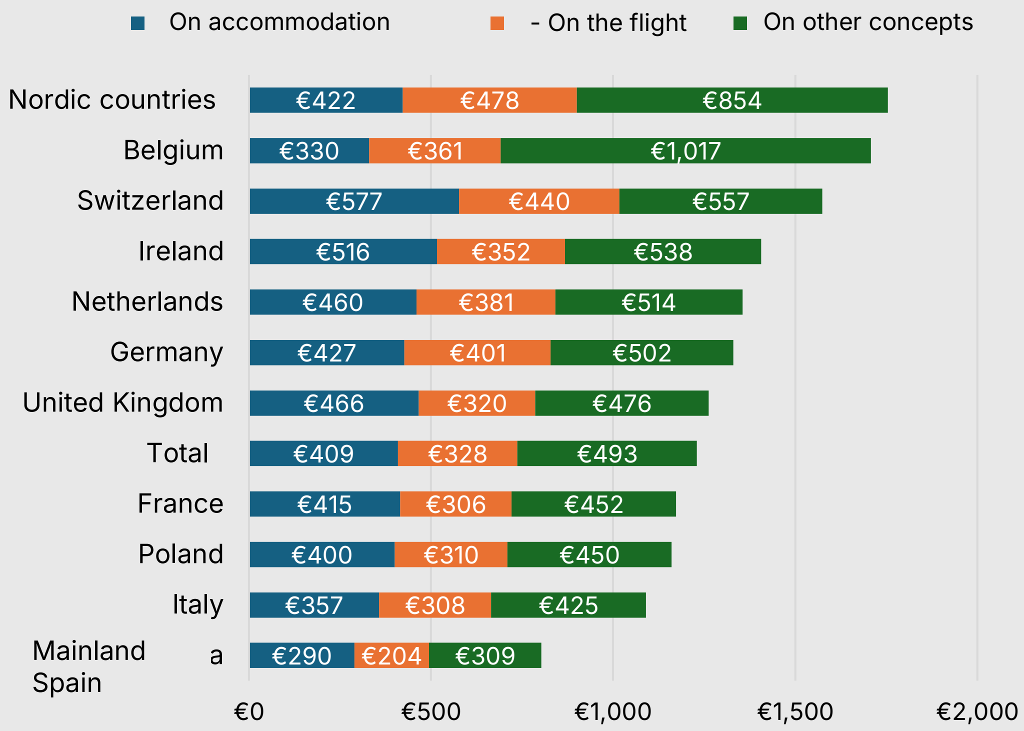
On the other hand, among tourists who travel without a package, Switzerland and Ireland have the highest spending on accommodation. The Nordic countries and Switzerland register the highest spending on flights, while Belgium and the Nordic countries have the highest spending on "other concepts."

Expenditure per trip of tourists travelling with a tourist package in 2024



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

Expenditure per trip of tourists travelling without a tourist package in 2024



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

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Air transport connectivity and intermediation

Indicator	Description	Availability	Fountain	Remarks
Number and frequency of routes and volume of passengers from abroad to the airports of the Canary Islands / Volume of passengers according to main routes	Connectivity with a large number of airports is a crucial factor for the competitiveness of the tourism sector.	Available	AENA	
The share of distribution channels and the number of operators	Percentage of tourists who use tourist packages, OTAs and direct purchase of tourism products and number of intermediaries and airlines.	Partially available	Tourist Expenditure Survey (ISTAC)	
Monthly scheduled airline capacity	Airline capacity is measured through landing slots, as a way of forecasting tourism trends in a region dependent on airlines.	Available	AENA	
Tourist profiles according to the use of tourist packages		Available	Tourist Expenditure Survey (ISTAC)	
Profiles of tourists who use online travel agencies		Unavailable		The growing weight of online intermediation makes it necessary to have more information about the behaviour of these tourists.

4.4

Destination innovation, economic impacts and benefits

Introduction

The economic impacts of tourism in the Canary Islands are reflected in the high share of the economy that depends, both directly and indirectly, on tourism activity: according to the latest estimate, it accounted for 36.8% of Gross Domestic Product (GDP) in 2024. This income-generating capacity was curtailed during the COVID-19 pandemic, but by 2023, it had already exceeded 2019 levels, as indicated by the aggregate tourism expenditure of €17 billion at constant prices. Undoubtedly, this notable recovery is a testament to the strength and competitiveness of the Canary Islands' tourism product in its source markets. The growth in aggregate tourism expenditure over the past year is explained by increases in the number of tourists, the average length of stay, and spending per tourist per day. This expenditure continues to be concentrated primarily in accommodation and transportation to the destination, mirroring the pre-pandemic distribution.

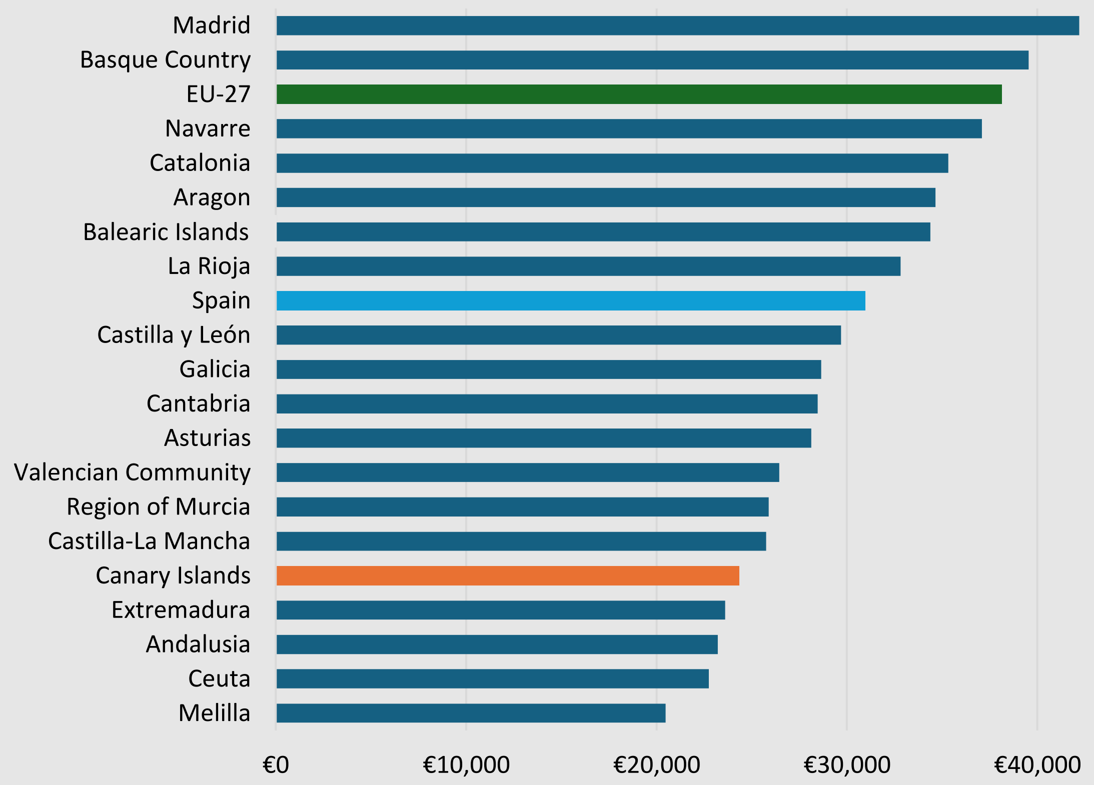
Despite the rise in tourism spending last year, the Canary Islands still recorded relatively low GDP per capita levels in 2023, ranking fifth from the bottom among Spain's Autonomous Communities—only ahead of Extremadura, Andalusia, Ceuta, and Melilla. Nevertheless, there has been a slight improvement in GDP per capita compared with the pre-pandemic years, signalling a recovery from the COVID-19 economic crisis.

GDP per capita

Despite its leadership in tourism, the Canary Islands continue to record a GDP per capita below that of most other Spanish autonomous communities. Its economy, which is highly dependent on tourism, does not translate into higher per capita income for its residents. Regions less reliant on tourism, such as Madrid or the Basque Country, report significantly higher values.

Labour precarity and the rising cost of living further widen this economic gap. Moreover, the Canary Islands remain below the Spanish and EU-27 averages, highlighting their relative lag. Diversifying the economy is therefore an urgent priority to reduce this dependency and enhance regional development.

GDP per capita in 2023 at current prices

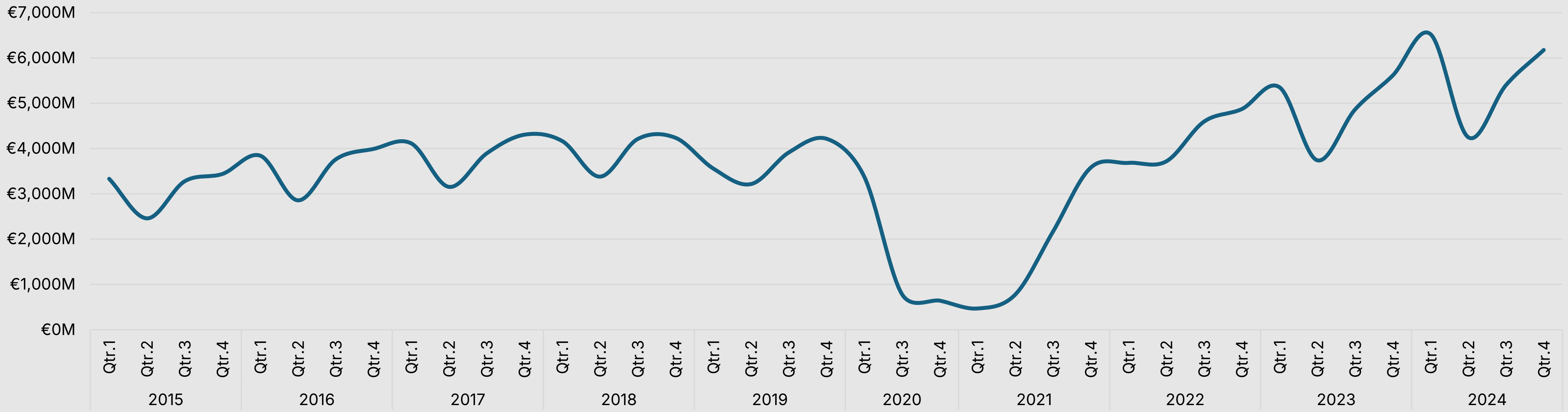


Source: Regional Accounts of Spain (INE)

Total tourist expenditure and daily tourist expenditure

The graph shows a positive trend in tourist expenditure in the Canary Islands from 2015 to 2024. A steady increase is observed, with a clear seasonality marked by peaks in the summer months. However, the COVID-19 pandemic caused a significant drop in tourist spending in 2020 and 2021. From the third quarter of 2021 onwards, a gradual recovery is evident, but it is not until 2022 that pre-pandemic levels are not only reached but surpassed. Notably, between the third quarter of 2019 and the third quarter of 2024, tourist spending grew by 32%, reflecting the sector's resilience and its capacity to recover after the health crisis. This upward trend, along with seasonality, are key factors to consider. It is also important to highlight, as will be discussed in later sections, the role of prices and the growing influx of tourists in explaining this trend, rather than an increase in daily tourist expenditure.

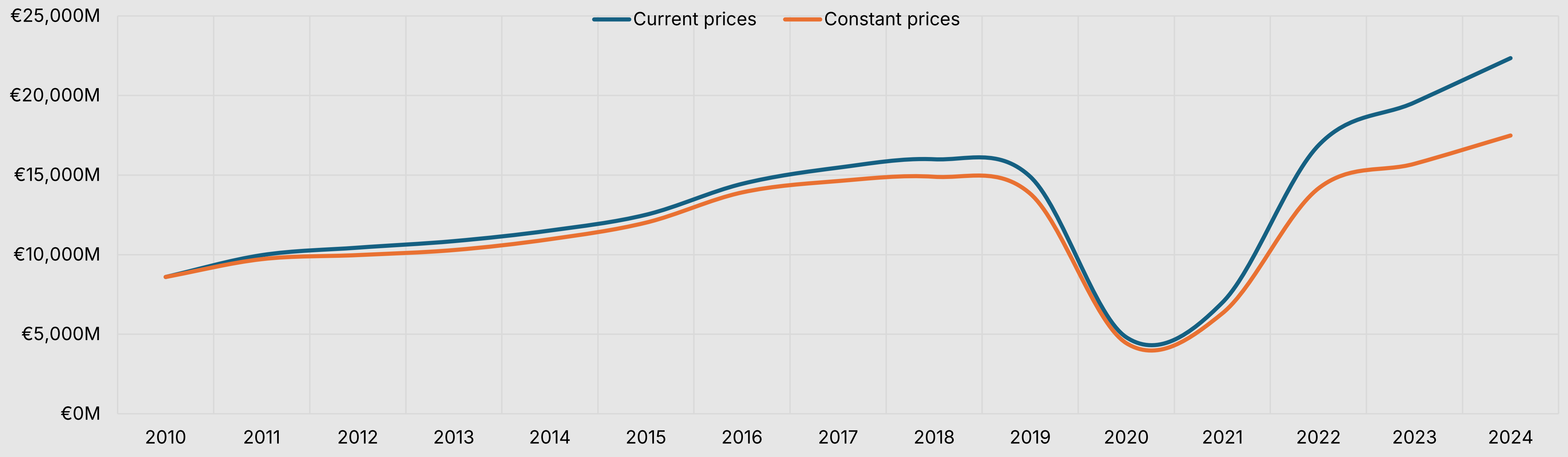
Quarterly tourist expenditure aggregated at current prices of foreign and mainland tourists visiting the Canary Islands



Note: No data were released for the second quarter of 2020. Source: Survey on Tourist Expenditure (ISTAC)

Tourist expenditure in the Canary Islands shows a rising trend between 2010 and 2024, reflecting the strength of the sector. The COVID-19 pandemic in 2020 caused an abrupt drop, followed by a rapid recovery from 2021 onwards, surpassing pre-pandemic levels in 2022. The comparison between current and constant prices highlights the impact of inflation, indicating that part of the growth is due to price increases. These data confirm the relevance of tourism in the Canarian economy and its strong recovery capacity. However, the recovery has not been as robust as suggested by the figures at current prices. In 2023, values slightly surpassed those of 2018 at current prices, and by 2024, a very notable growth is evident.

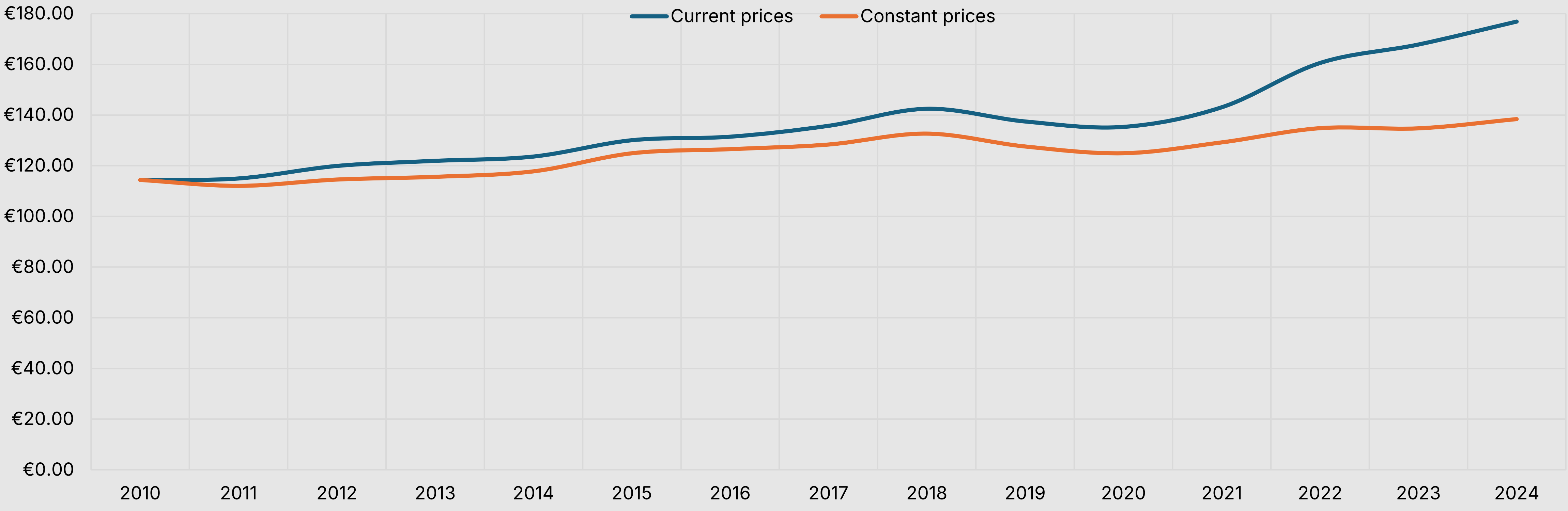
Aggregate annual tourist expenditure of tourists arriving in the Canary Islands



Note: Base year for constant prices 2010. Includes residents of the rest of Spain and foreigners
Source: Survey on Tourism Expenditure (ISTAC) and Consumer Price Index (INE)

Expenditure per tourist per day has shown an upward trend over time, suggesting a positive economic impact. However, when adjusted for inflation, the real growth is more moderate, indicating that part of the increase is due to the overall rise in the cost of living. This reflects that, although nominal expenditure has grown considerably, the more relevant variable, real tourist spending, has not increased at the same rate.

Expenditure per tourist and day of tourists arriving in the Canary Islands

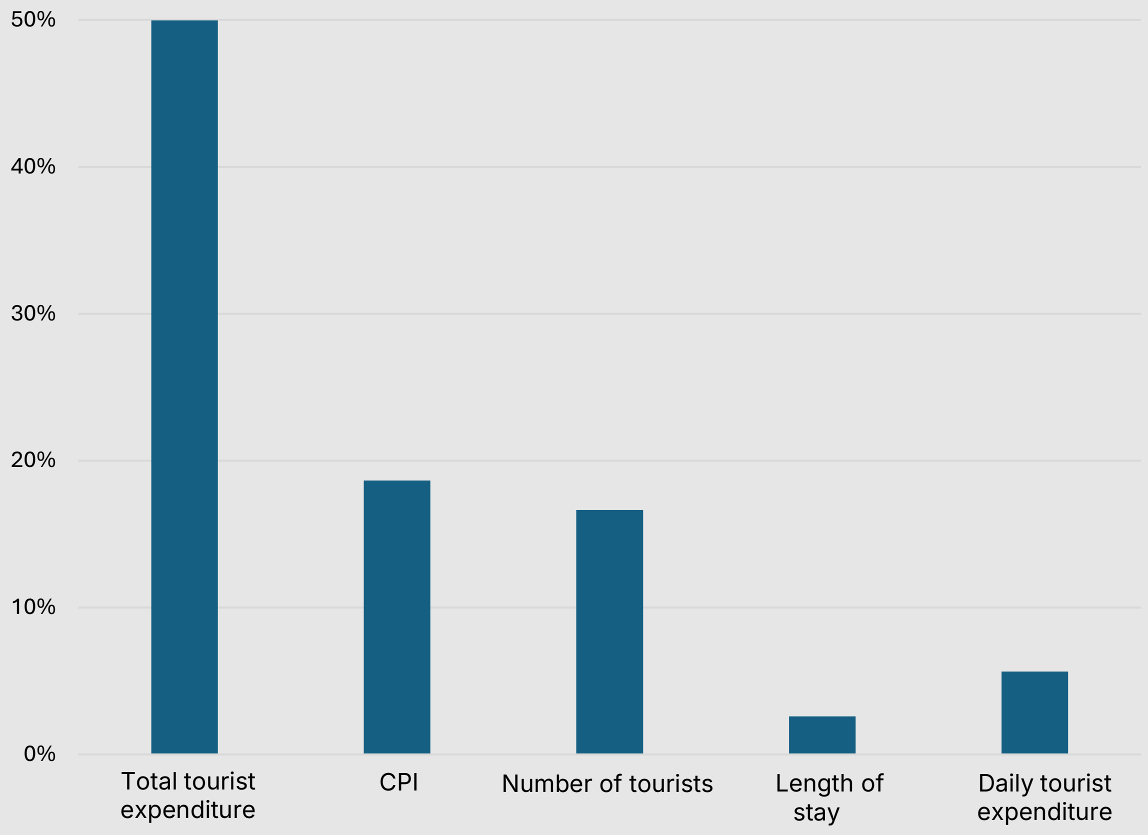


Note: Includes international and mainland Spain tourists. Base year 2010
Source: Survey on Tourism Expenditure (ISTAC) and Consumer Price Index (INE)

The 50% growth in total tourism expenditure between 2019 and 2024—reaching a record aggregate tourism expenditure of €22,351 million—is driven primarily by increases in the Consumer Price Index (CPI) and the number of tourists, which rose by 18.6% and 16.6%, respectively, over the period. In contrast, spending per tourist per day at constant prices (i.e., adjusted for inflation) grew much more modestly, by just 5.6% cumulatively over those five years, while the average length of stay increased only slightly, by 2.6%. This suggests that the rise in total tourist expenditure in the Canary Islands owes less to each visitor spending significantly more and more to a larger influx of tourists and higher prices.

Enhancing expenditure per overnight stay is a critical objective for the destination and should lie at the heart of its tourism strategy, so that aggregate spending growth depends primarily on this metric. However, the breakdown of aggregate expenditure components shows that post-pandemic recovery in Canary Islands tourism has relied more on visitor volume and price hikes than on improved per-tourist profitability. This heavy dependence on high arrival numbers may pose future challenges regarding sustainability and carrying capacity.

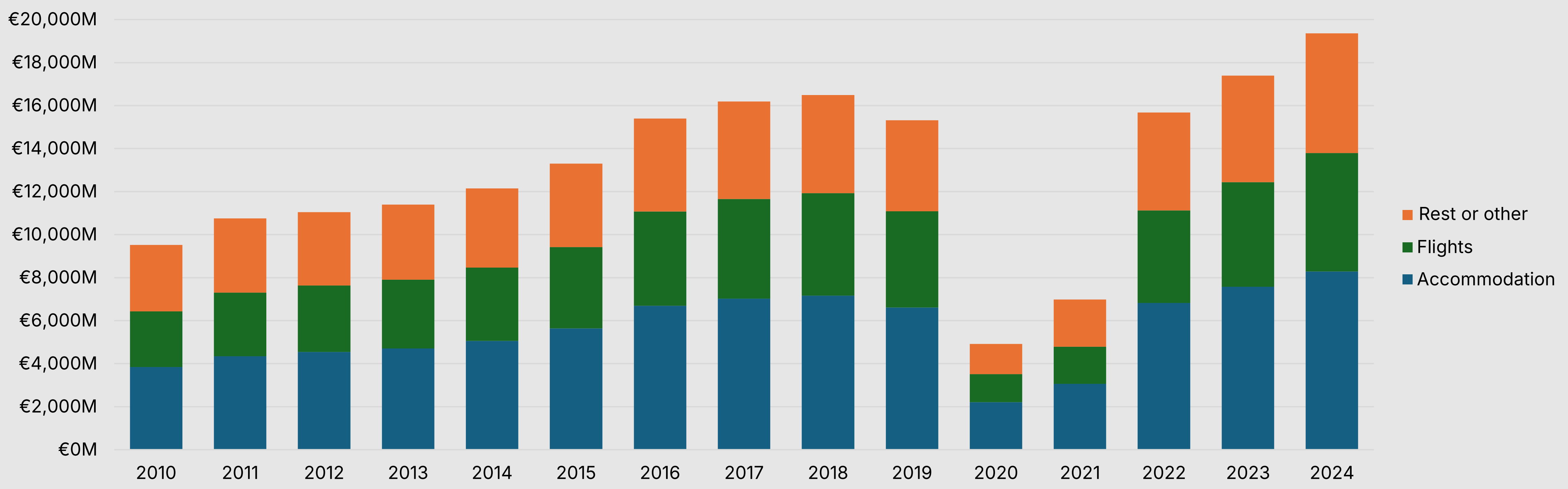
Growth in tourism expenditure 2019-2024 and its components



Source: Survey on Tourist Expenditure (ISTAC)

Sustained growth can be observed in total expenditure at constant prices, as well as in each spending category throughout the analysed period. Accommodation accounts for the largest share of expenditure, followed by flights and other services. However, the COVID-19 pandemic caused a significant decline in spending across all categories in 2020, although a gradual recovery was seen in 2021, followed by a rapid rebound in the subsequent periods, even surpassing pre-pandemic levels.

Tourist expenditure at constant prices of international and mainland tourists visiting the Canary Islands by expenditure type

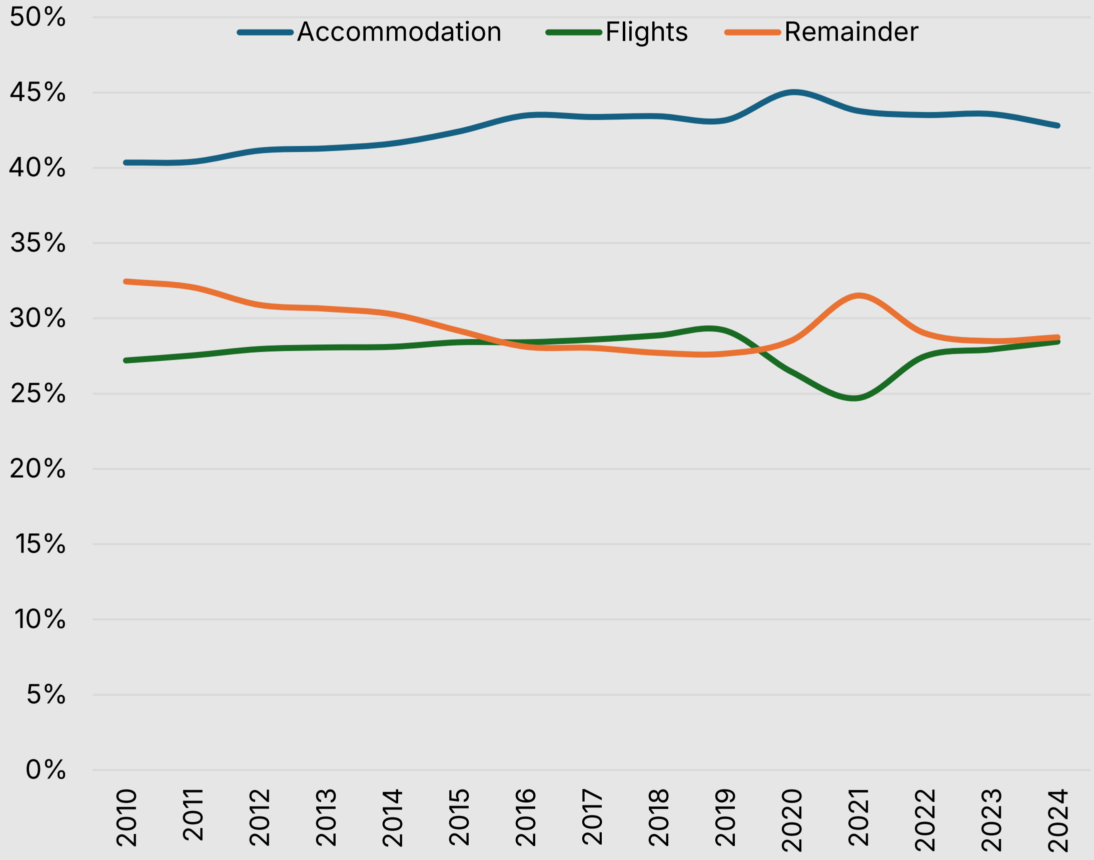


Note: Base year 2021
Source: Survey on Tourism Expenditure (ISTAC) and Consumer Price Index (INE)

Over the past fourteen years, accommodation has maintained a stable share of total tourist expenditure, with a slight upward trend, ranging between 40% and 45% throughout the period. This figure is relatively high compared to other European destinations. It is linked to the quality of the accommodation, but also to the limited capacity of the tourism sector to increase spending outside of accommodation through a diversified and high-quality offer of leisure, dining and shopping. In this area, there are still important investment opportunities.

On the other hand, the percentage represented by air transport to the Canary Islands has shown a slightly increasing trend, from 27% in 2010 to 28% of total expenditure in 2024, reaching a peak of 29% in 2019. Meanwhile, the “Remainder” category of expenditure, which mainly includes spending at the destination, has been losing weight in the “tourist shopping basket”. Changing this structure through a greater share of in-destination spending should be a priority in the coming years.

Distribution of tourism expenditure 2010-2024 and its components

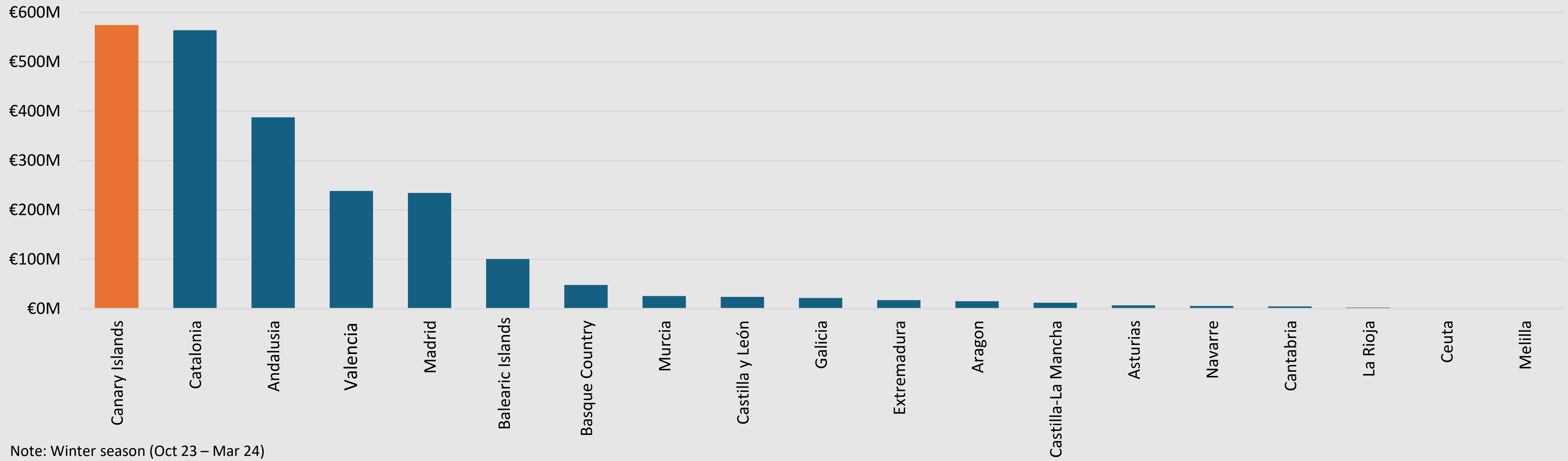


Source: Survey on Tourist Expenditure (ISTAC)

Spending on point-of-sale terminals

The Canary Islands record the highest expenditure in the country at point-of-sale terminals by international tourists during the winter season. The only autonomous community with relatively similar figures is Catalonia.

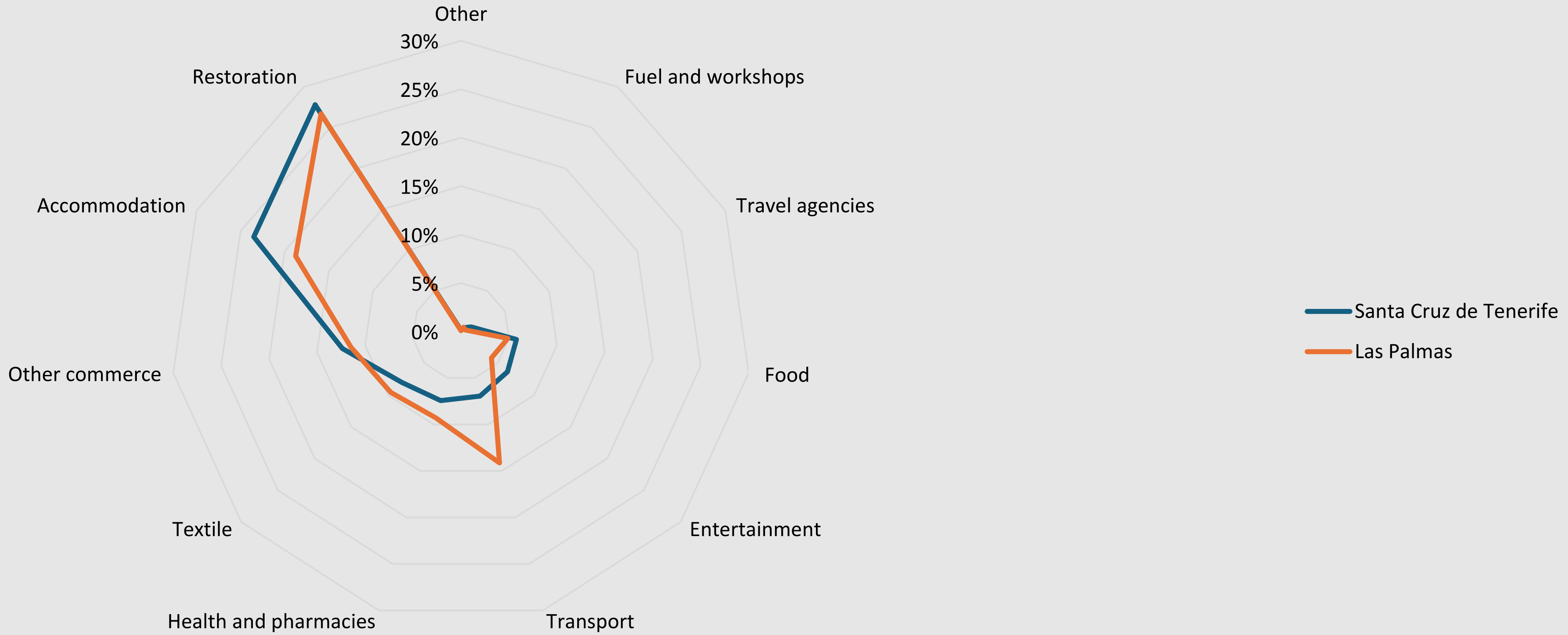
Expenditure at point-of-sale terminals for international tourists, by autonomous community of destination in 2024



Note: Winter season (Oct 23 – Mar 24)
Source: Mabrian. Data extracted from Dataestur

The distribution of expenditure at point-of-sale terminals by category in both provinces shows similar patterns, with notable differences in transport favouring the eastern province and in accommodation favouring the western province

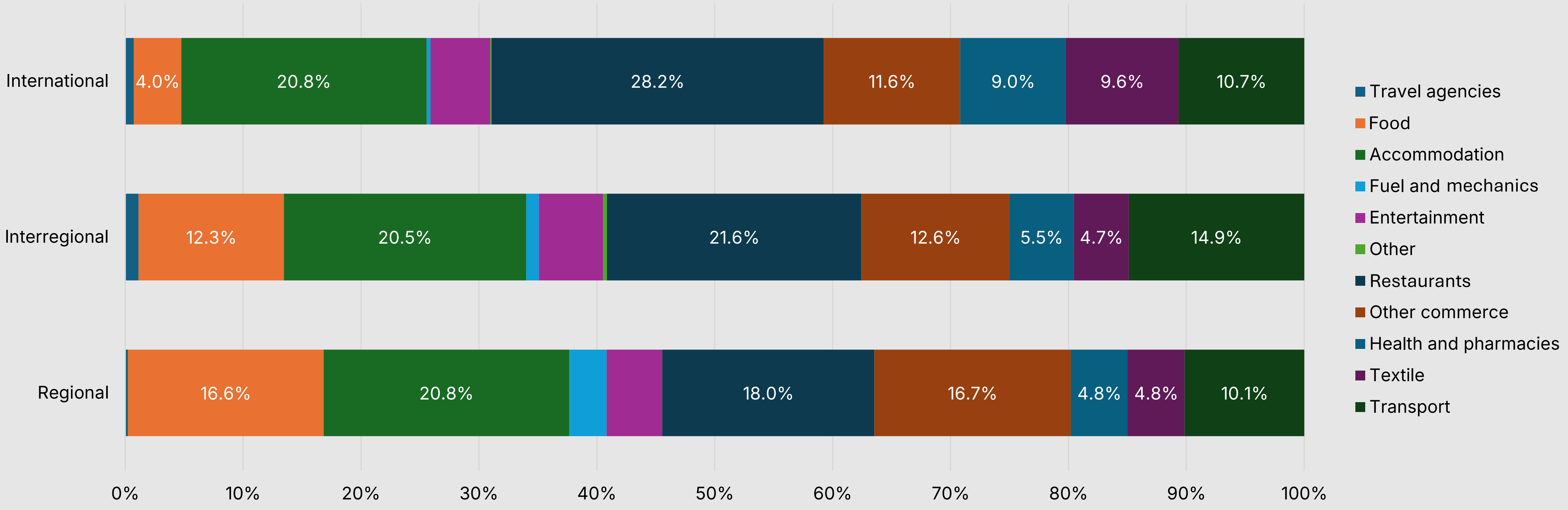
Distribution of expenditure on point-of-sale terminals according to categories in the provinces of the Canary Islands in 2024



Note: Accumulated January – November 2024. Source: Mabrian. Data extracted from Dataestur

The distribution of expenditure at point-of-sale terminals in the Canary Islands shows a similar overall pattern, but with some differences in the categories of catering, with a greater share for international tourism, and food, with a greater share for internal tourism flows within the archipelago

Distribution of expenditure at point-of-sale (POS) terminals in the Canary Islands according to categories and types of tourism



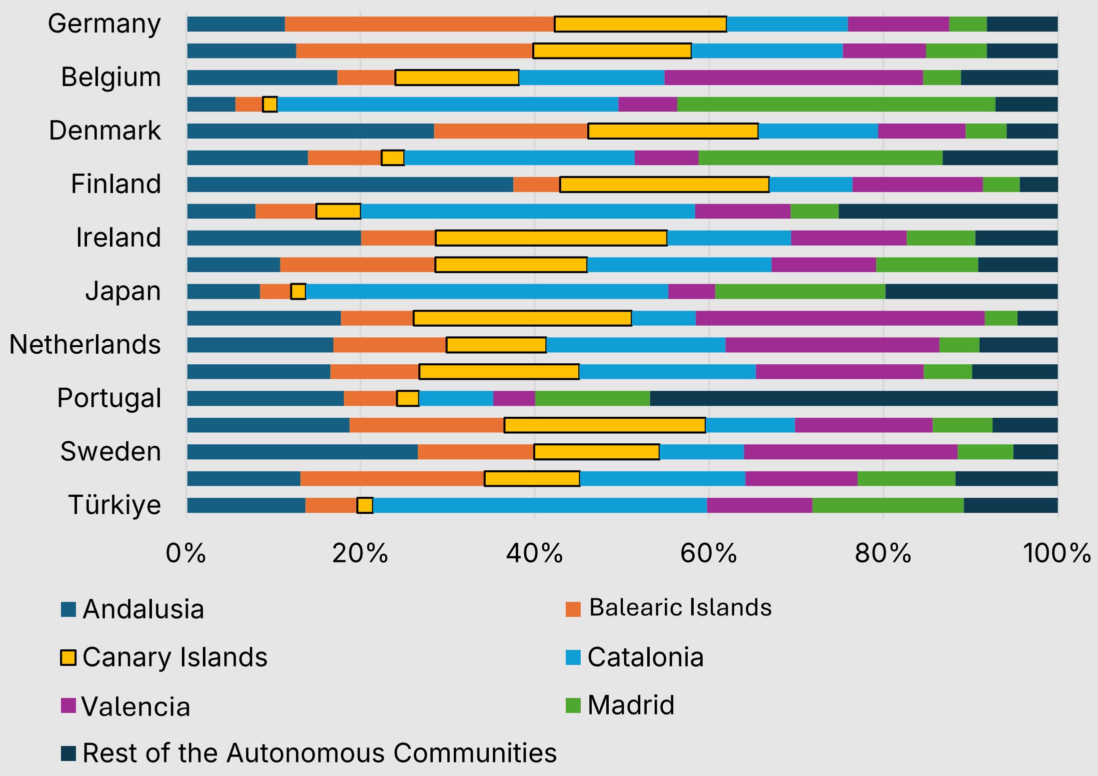
Note: Accumulated January – November 2024. Source: Mabrian. Data extracted from Dataestur

Expenditure at destination, experimental statistics (INE)

The new experimental statistics from Spain's National Statistics Institute (INE) on in-destination expenditure by foreign visitors—measured through point-of-sale (POS) transactions and ATM withdrawals—provide a comparative view of tourist spending.

A country-by-country analysis shows that the Canary Islands are highly effective at attracting tourism expenditure from Northern Europe, particularly from countries such as the United Kingdom, Germany, Norway, and Finland. This underscores the key role these source markets play in the archipelago's economy, reinforcing its specialisation in sun-and-beach tourism with a strong winter seasonality. However, the low presence of tourists from emerging markets such as China, the United States, or Japan highlights the limited diversification of tourism in the Canary Islands. This concentration of arrivals is the result of successful competitive strategies, but it also entails risks, as it creates a strong dependency on certain markets, such as the UK.

Distribution of expenditure at destination of each country of residence by autonomous community in 2023

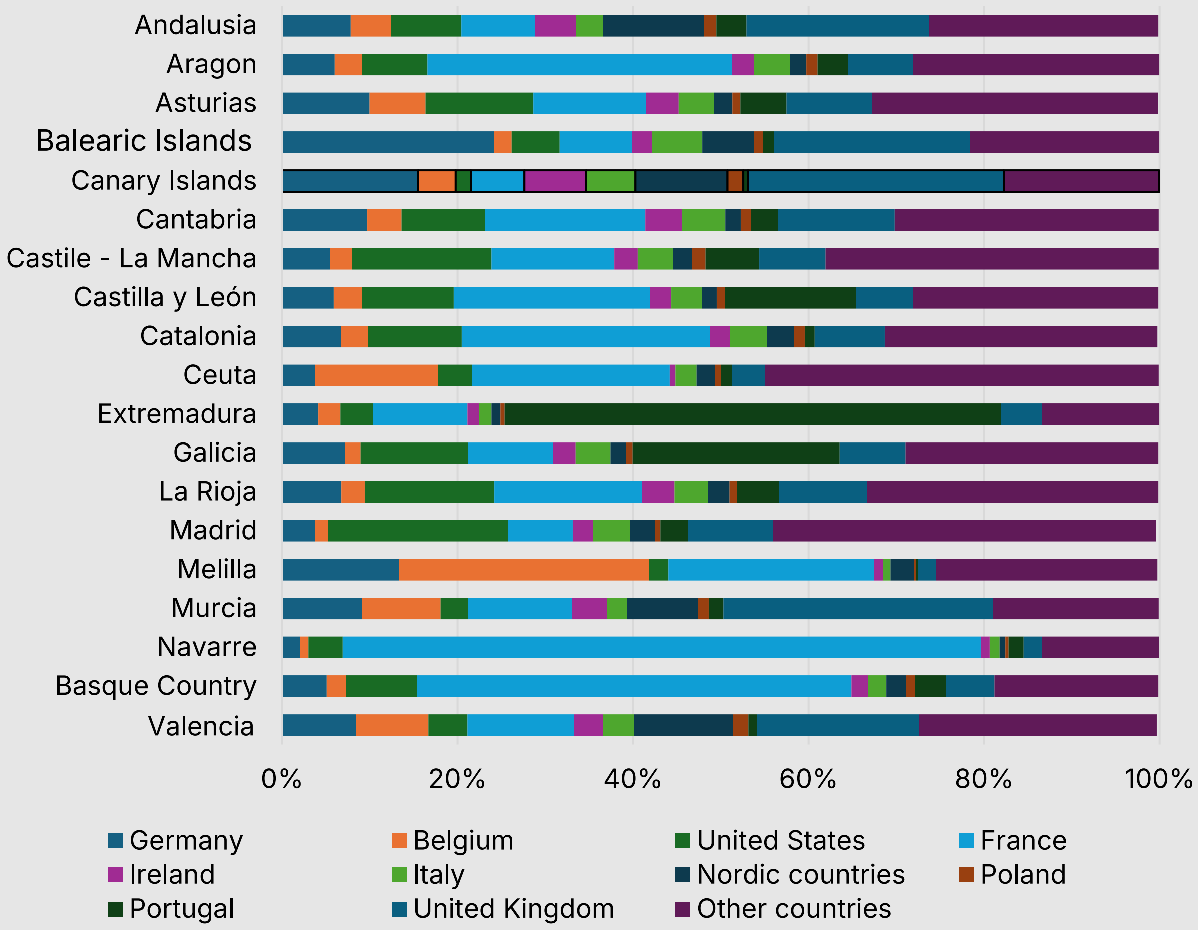


Note: Includes point-of-sale terminals and ATMs. Source: Distribution of expenditure at destination made by foreign visitors on their visits to Spain (INE)

The distribution of card spending by country of residence in the Canary Islands shows that British visitors account for 29% of the spending, followed by Germans. Additionally, the role of Nordic tourists is more prominent in the Canary Islands than in other regions closer to their places of origin, as these tourists mainly visit during the winter.

What is particularly interesting in this analysis are some significant differences compared to other autonomous communities. In the case of France and the United States, the weight of these countries is greater in other Spanish regions.

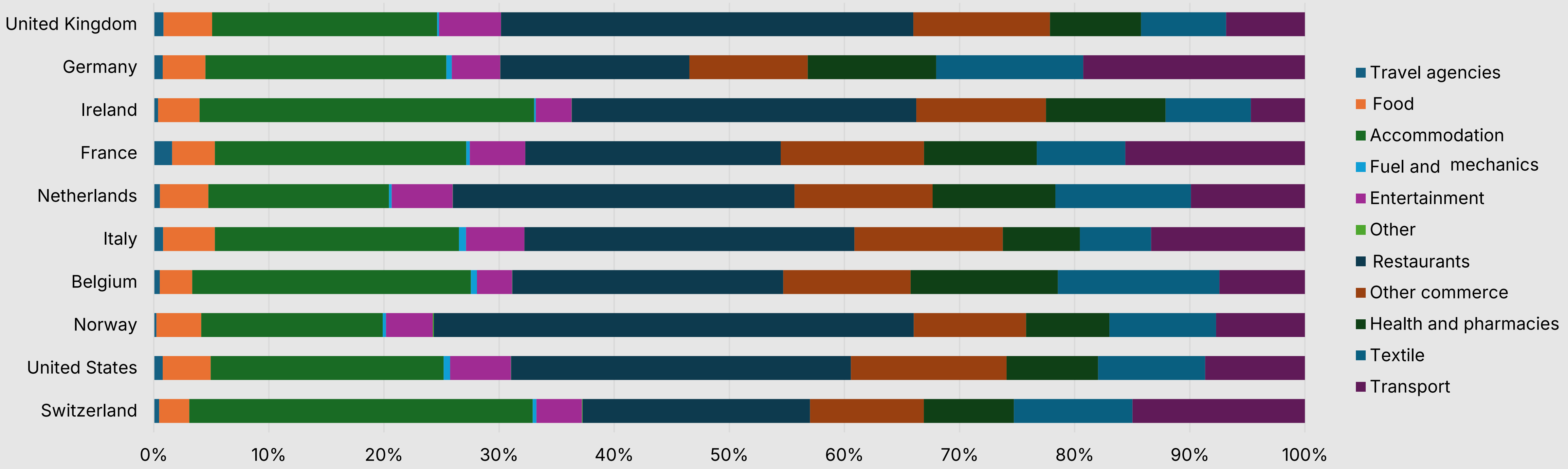
Distribution of card spending by destination autonomous community by country of residence in 2023



Note: Includes point-of-sale terminals and ATMs. Source: Distribution of expenditure at destination made by foreign visitors on their visits to Spain (INE)

Among the ten countries with the highest tourist spending in the Canary Islands, the category where tourists generally spend the most is restaurants, followed by accommodation. It is worth mentioning that Norwegians allocate the highest percentage of their spending to restaurants

Distribution of expenditure on point-of-sale (POS) terminals in the Canary Islands by country and category



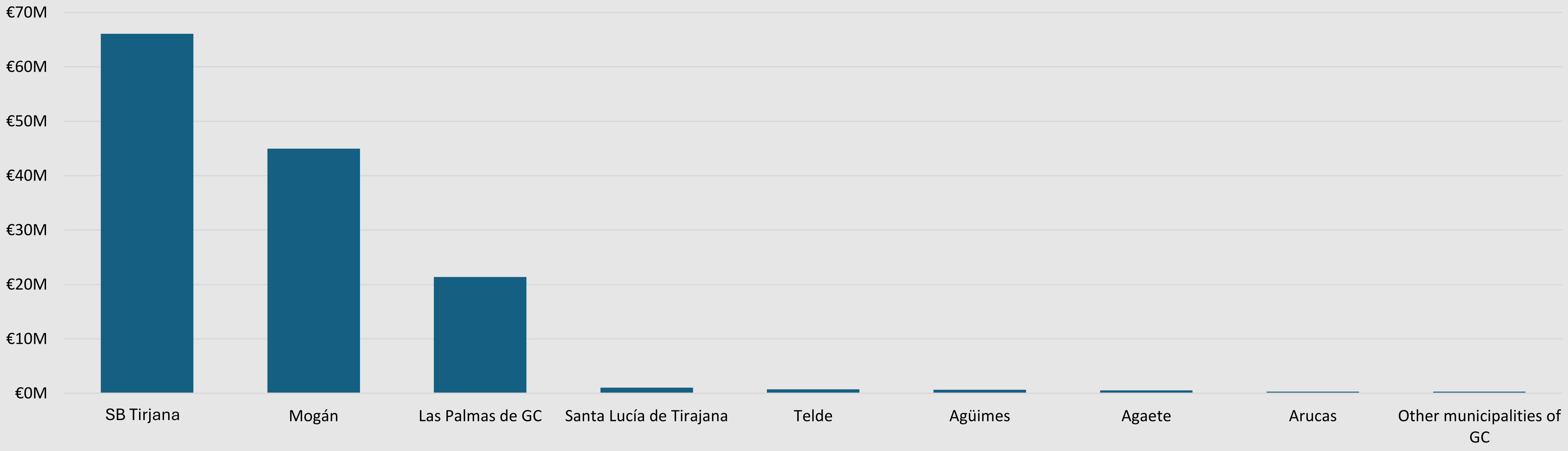
Note: 10 countries with the highest spending in the period January – November 2024
Source: Mabrian. Data extracted from Dataestur

Tourist spending by card in Gran Canaria

The Tourist Information System of Gran Canaria also includes data on spending through point-of-sale terminals by municipalities, based on information provided by BBVA.

Notably, San Bartolomé de Tirajana stands out, with Mogán and the city of Las Palmas de Gran Canaria in second and third place, respectively, far ahead of other municipalities

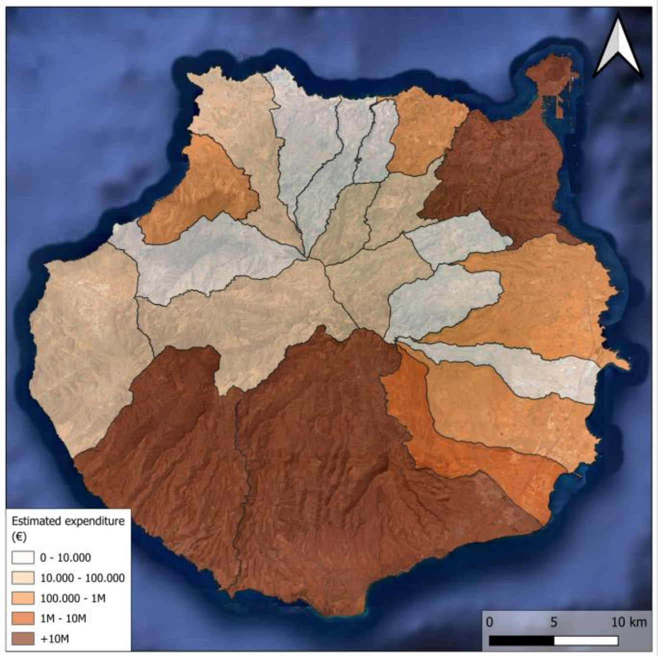
Estimated expenditure of foreigners on point-of-sale (POS) terminals in municipalities of Gran Canaria



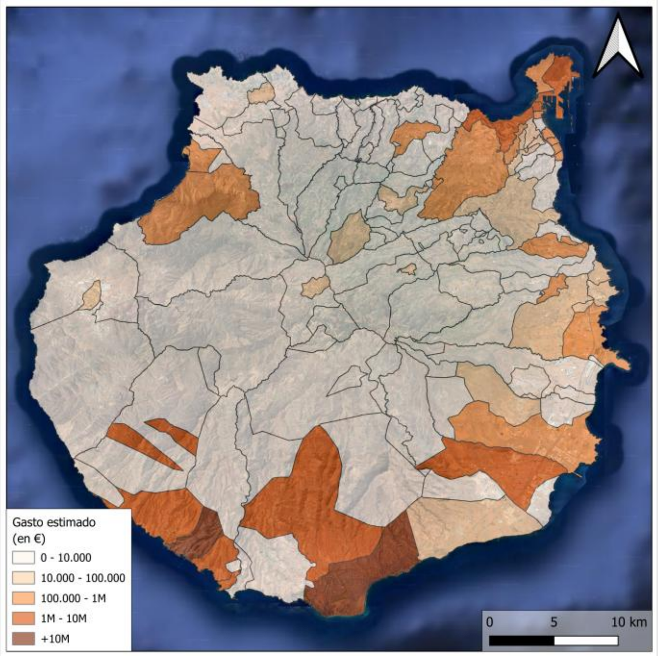
Note: The expense is estimated based on transactions made using BBVA credit cards and any transaction made on a BBVA POS terminal, regardless of the card issuing company (national or international). Accumulated January – August 2024.
Source: BBVA. Data extracted from SITGRAN

The maps reflect the distribution of spending through point-of-sale terminals in Gran Canaria between January and August 2024, both at the municipal and postal code levels. It is observed that areas with higher economic activity and tourist influx concentrate the highest spending, especially in the southern part of the island and the capital, Las Palmas de Gran Canaria. These areas show the highest values, exceeding 10 million euros in some municipalities, highlighting their importance as consumption and economic dynamization hubs. The analysis by postal codes offers a more detailed view of spending, showing disparities even within municipalities with high consumption. While the main tourist and commercial hubs concentrate a significant portion of spending, other areas in the interior and the north show considerably lower levels

Estimated expenditure of foreigners on point-of-sale (POS) terminals in municipalities of Gran Canaria



Estimated expenditure by foreigners at point-of-sale (POS) terminals by postal codes



Note: The expense is estimated based on transactions made using BBVA credit cards and any transaction made on a BBVA POS terminal, regardless of the card issuing company (national or international). Both images correspond to the period January – August 2024. Source: BBVA. Data extracted from SITGRAN

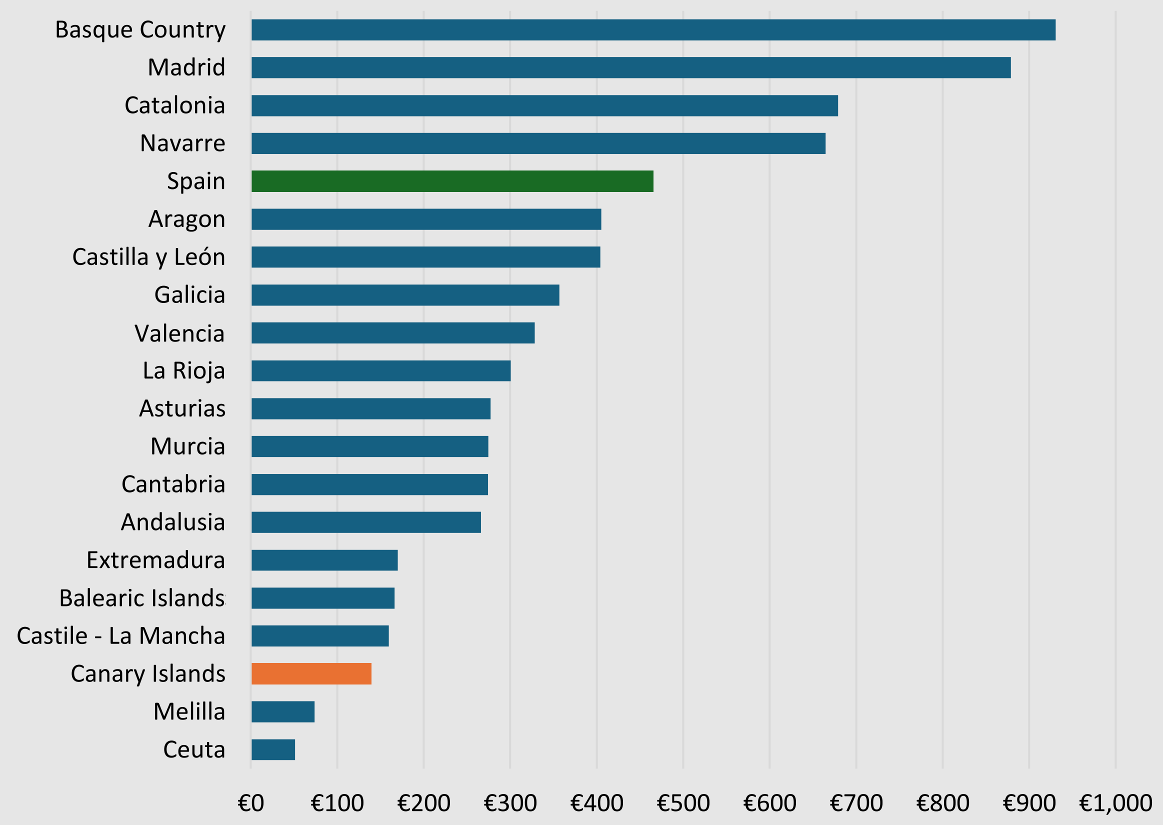
Business spending on research and development

Innovation, research, and development are fundamental pillars for long-term economic growth in any advanced society. In the case of the Canary Islands, there is a significant lack of indicators regarding innovation processes and product development in the tourism sector, requiring the use of aggregated indicators for the entire region in this report. These indicators provide a partial but illustrative view of the archipelago's reality, where spending by companies and administrations on research and development is very low.

In 2023, the Canary Islands ranked among the autonomous communities with the lowest research and development expenditure per capita, significantly below the national average. This low investment in research and development reflects a structural deficit in innovation, which limits the competitiveness of the region’s business sector and its ability to diversify the economy beyond tourism. The limited presence of technological industries and high value-added sectors also contributes to this situation.

To bridge this gap, it is crucial to implement policies that promote investment in innovation, encouraging collaboration between universities, research centres, and local businesses. Furthermore, strategic sectors such as renewable energy, tourism digitalization, and biotechnology could represent opportunities to increase investment in R&D and reduce the reliance on an economic model primarily based on tourism and services

Per capita expenditure on internal R+D in 2023

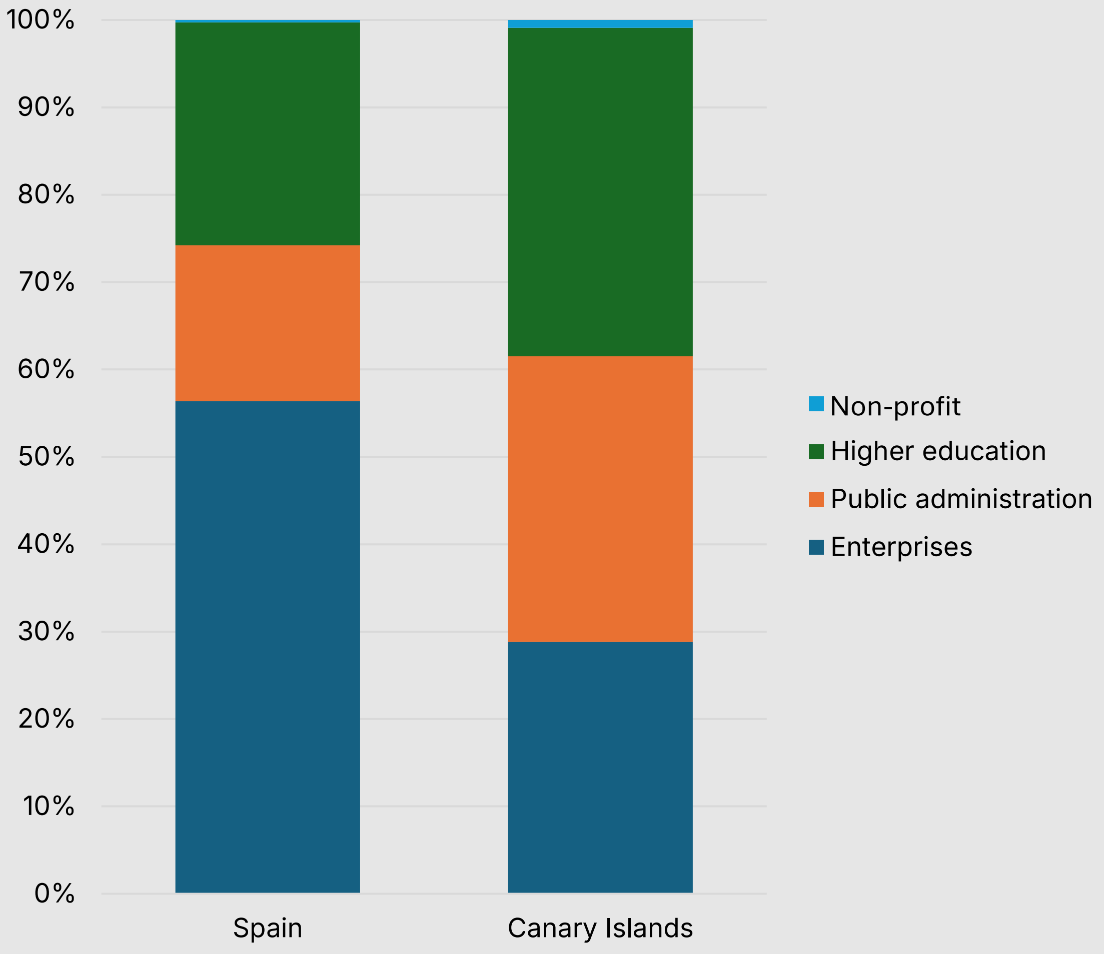


Sources: Statistics on R+D activities (INE) and Continuous population statistics (INE)

In the Canary Islands, the distribution of R&D spending shows a lower participation of the business sector compared to the Spanish average, where companies lead the investment in innovation. In the archipelago, funding comes largely from public administration and higher education, indicating a lower level of private initiative in research activities.

This structure reflects the challenges faced by the Canary Islands' business base in driving innovation autonomously, which limits its competitiveness and ability to generate new economic opportunities. To improve this situation, it is crucial to incentivize private investment in R&D through innovation support policies, as well as strengthen the connection between universities and the productive sector, promoting strategic sectors such as renewable energy and biotechnology. The tourism sector, understood broadly as the entire value chain, is poised to participate in this necessary change.

Distribution of R+D expenditure in Spain and the Canary Islands in 2023

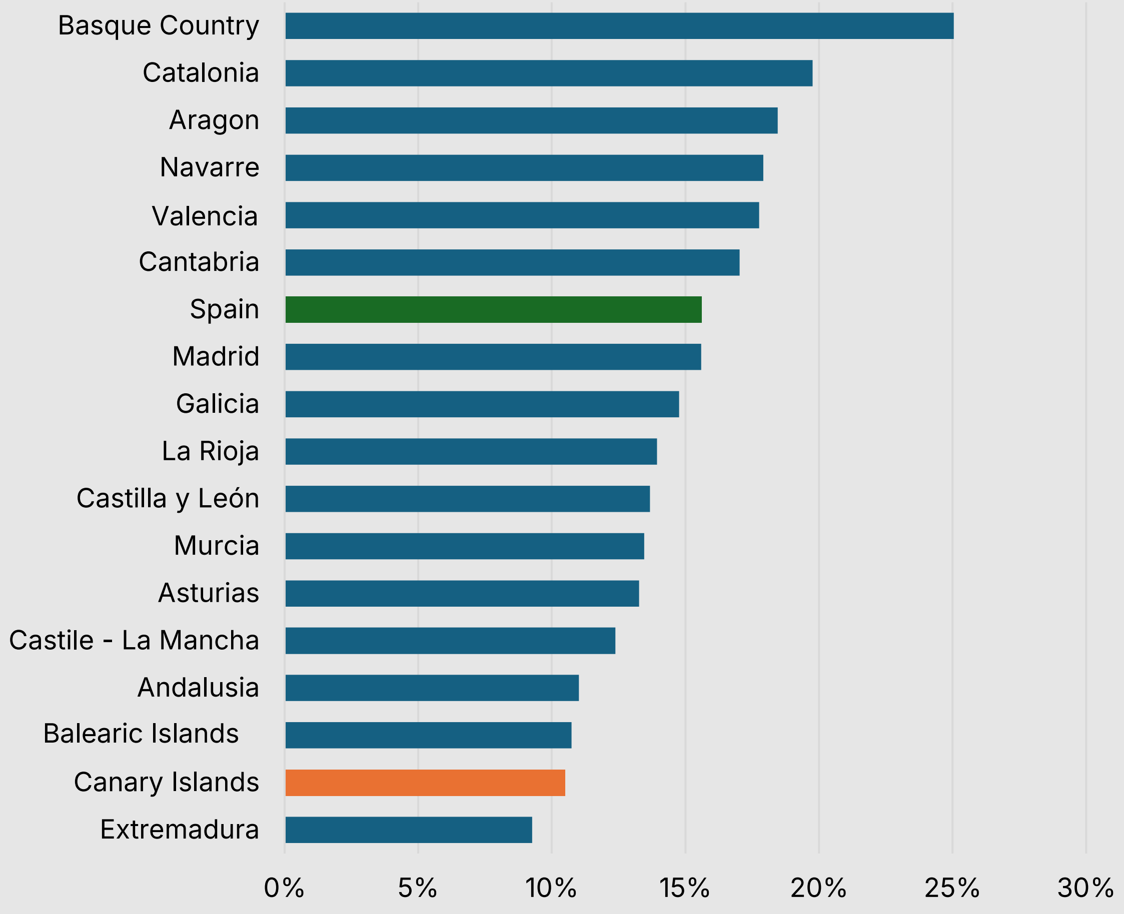


Source: Statistics on R+D activities (INE)

The Canary Islands are among the autonomous communities with the lowest percentage of companies investing in innovation, falling below the national average. This low level of investment reflects a less dynamic productive base in terms of R&D, which limits its competitiveness and ability to diversify the economy. In a territory highly dependent on tourism, the lack of focus on innovation could act as a barrier to the development of alternative sectors that provide greater added value.

To bridge this gap, it is essential to promote innovation support policies, especially in strategic sectors such as sustainability, tourism digitalization, and renewable energy. Furthermore, encouraging collaboration between universities, research centres, and local businesses could foster an innovative ecosystem that reduces economic dependence and enhances the resilience of the Canary Island business sector.

Percentage of companies with spending on innovation over the total number of companies by autonomous community in 2022



Source: Survey on Innovation in Companies (INE)

Destination innovation, economic Impacts and benefits

Indicator	Description	Availability	Fountain	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 Survey of the Salary Structure (INE) Employed by economic sectors (INE and ISTAC)	Data on working conditions are needed.
Local added value related to tourism expenditure. Tourism GDP	Added value generated as a result of tourist 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 on this indicator.
Distribution of the economic impact of tourism on the local economy in the form of employment and income (value added) among the different economic activities, economic agents and territories. Leakage abroad via repatriation of profits and others.	This indicator assesses the success of the region 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).	Unavailable		Data on the distribution of local value added for different economic activities and economic agents are needed.
Research, development and investments in innovation and results of tourism-related companies. Personnel employed in R+D in the Canary Islands in full-time equivalent. Percentage of total domestic expenditure on R+D activities in relation to GDP	Indicators on the number of initiatives, value, and current or projected results.	Partially available	Statistics on R+D activities (INE) Survey on Innovation in Companies (INE, 2021)	Specific data on tourism are needed.

4.5

Labour skills, entrepreneurship and employment

Introduction

The labour market in the Canary Islands displays structural characteristics that reflect both its dynamism and its persistent challenges. With an activity rate of 59.4%, comparable to the national average, and an unemployment rate of 14.4%, higher than the national average of 11.2%, the archipelago continues to face a labour context marked by the need for economic diversification. The high dependence on the tourism sector, which employs 24.6% of those registered with Social Security, highlights the central role of this activity in the Canarian economy, while also revealing its vulnerability to external factors such as economic crises or fluctuations in tourism demand.

The structure of tourism-related employment in the Canary Islands is characterised by a high degree of feminisation in certain subsectors, such as accommodation, and by the notable presence of foreign workers, particularly in food and beverage services. Moreover, there is a high concentration of low-skilled jobs, with a predominance of temporary contracts and wages below the national average, which limits opportunities for professional advancement and economic stability for many workers. Despite recent progress in reducing temporary employment following the 2021 labour reform, challenges remain in addressing job precarity and the underrepresentation of women in higher-skilled positions.

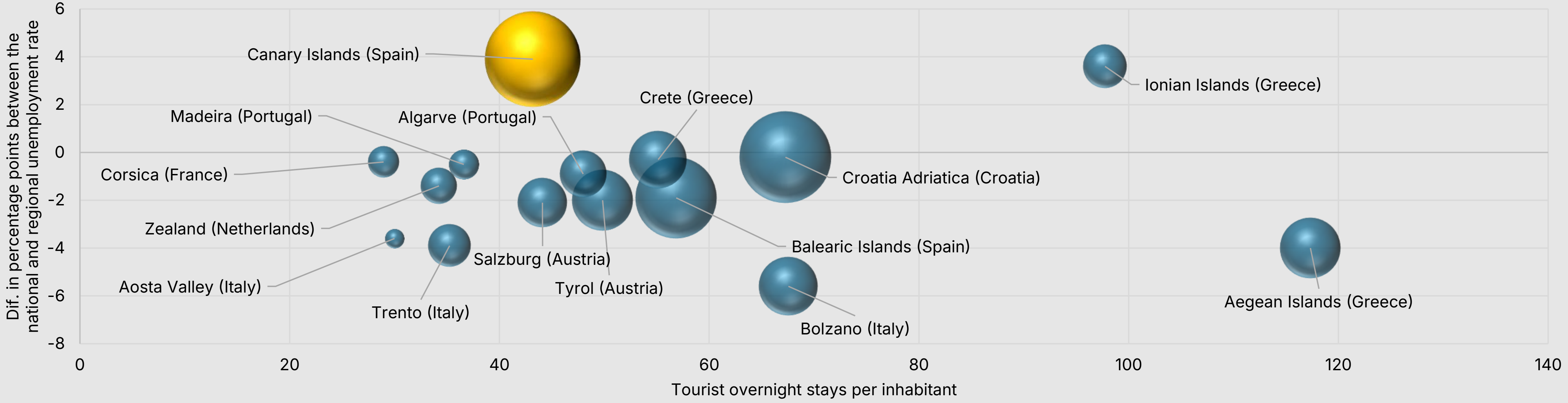
This section analyses the main dynamics of the labour market in the Canary Islands, with reference to education and entrepreneurship, considering aspects such as training, labour market integration, wage trends, and working conditions—particularly in the tourism sector, the main driver of the archipelago's economy. It also examines recent changes in education and employment policies, such as the implementation of dual vocational training, and its potential impact on the qualification of the working population. With a focus on social and economic sustainability, the report offers a comprehensive overview of the challenges and opportunities for strengthening the Canarian labour market and promoting more equitable and diversified development.

Tourism and unemployment from a European perspective

Among the European regions with the highest number of tourist overnight stays per inhabitant, the Canary Islands, and to a lesser extent the Ionian Islands, are the only ones that recorded an unemployment rate significantly above their national average (by 4 percentage points) in 2023.

This indicates that unemployment issues in the Canary Islands are not caused by their specialisation in tourism, but rather by structural characteristics of the Canaty Islands' labour market, some of which are shared with Spain.

Regional unemployment rates compared to the national unemployment rate for NUTS 2 regions in the regions with the highest number of tourist overnight stays in 2023

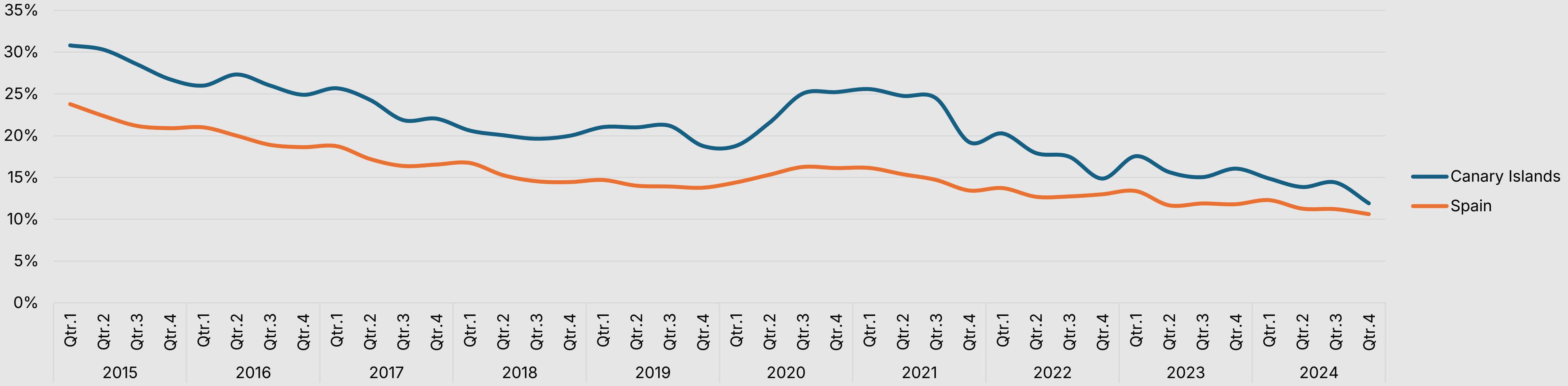


Note: The area of each bubble represents the total overnight stays in the region Source: Occupancy of Tourist Accommodation Establishments (Eurostat) and Unemployment Rates (Eurostat)

Unemployment rate

The activity rate in the Canary Islands stands at 59.4%, virtually identical to that of the rest of Spain (Q3 2024), while the unemployment rate is 14.4%, once again higher than the national average (11.2%). Unemployment remains one of the defining features of the Islands' labour market, as illustrated in the following charts. According to the Labour Force Survey (INE), the employed population comprised 997,400 people, of whom 53.7% were men and 46.3% women. Meanwhile, data from Social Security affiliation shows that, by the end of 2024, there were 941,210 registered affiliations in the Canary Islands, with 24.6% belonging to the group of economic activities characteristic of tourism. This group of affiliates grew by 4.3% since the end of 2023 (compared to 3.3% for all activities). Most tourism employment is concentrated in the accommodation subsector (83,845 people) and in food and beverage services (87,760 people).

Evolution of the unemployment rate in Spain and the Canary Islands



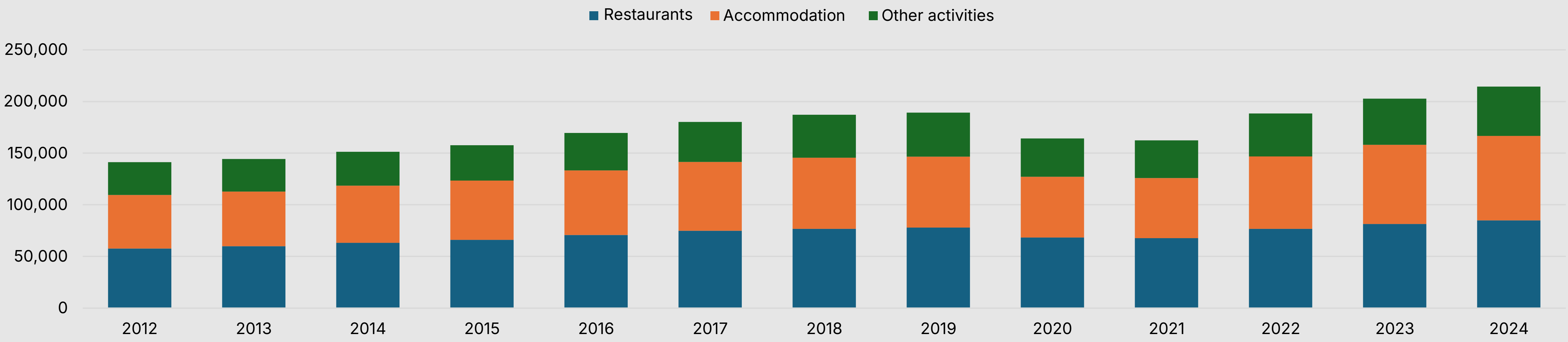
Source: Labour Force Survey (INE)

Characteristics of employment in tourism

The tourism sector in the Canary Islands exhibits sociodemographic characteristics that reflect its complexity and diversity. A notable feature is the feminisation of certain subsectors, particularly in accommodation, where women represent 52.8% of affiliates. While the sector as a whole shows a relatively balanced female participation rate (44.8%), comparable to the overall employed population, significant variations exist between subsectors. For example, the food and beverage sector shows a high presence of foreign workers, accounting for 35.3% compared to 14% across all affiliations and 25.3% within the broader tourism sector.

Additionally, according to the 2022 Canary Islands Household Income and Living Conditions Survey, the sector tends to attract a younger workforce, with 18.5% of workers under 30, compared to 14.2% across the general employed population. This labour structure highlights both the sector's potential for generating youth employment and its vulnerability to precarious employment conditions. These findings underscore the need for policies that promote stability, professional qualification, and social inclusion within this key economic sector for the Canary Islands.

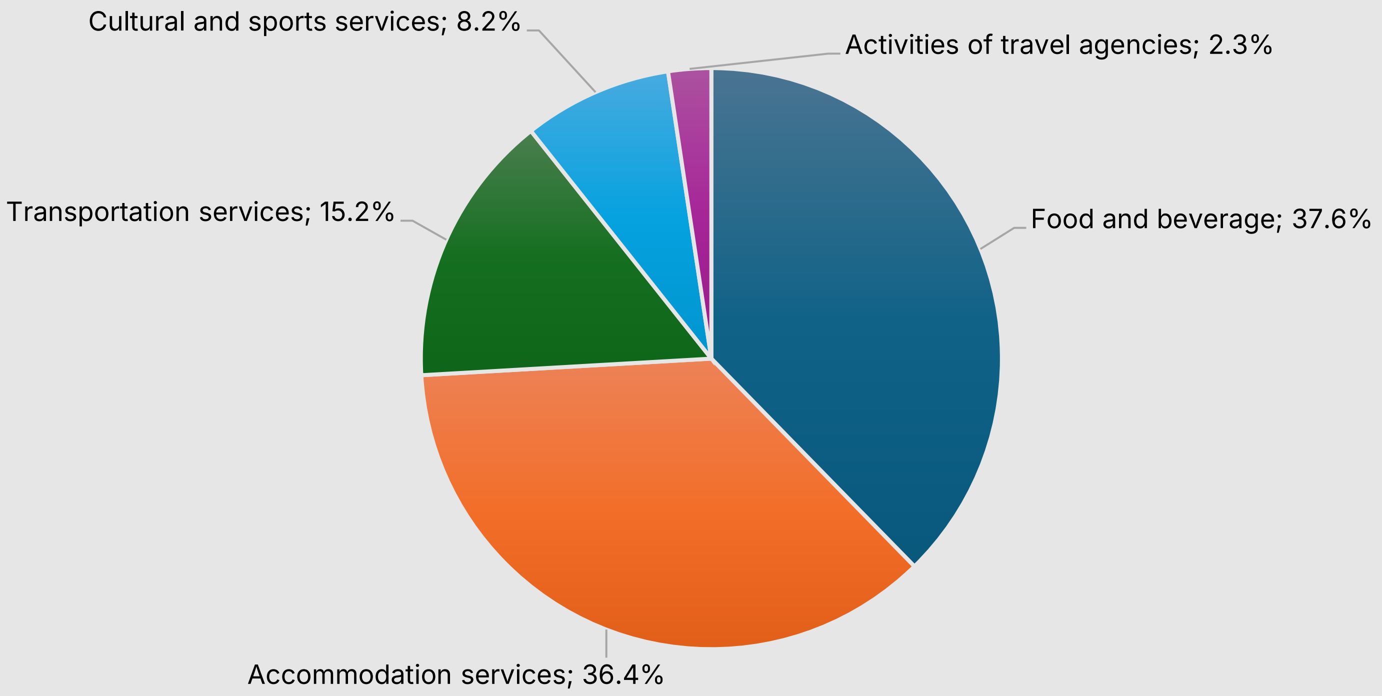
Annual average of the number of Social Security affiliates in activities characteristic of tourism in the Canary Islands



Source: Statistics on Social Security Affiliation by Place of Residence (ISTAC)

An analysis of Social Security affiliations in tourism-characteristic activities in the Canary Islands reveals a strong concentration of employment in the food and beverage services subsector (37.6%) and accommodation services (36.4%), which together account for nearly three-quarters of tourism-related employment in the archipelago. This employment structure highlights the central role of the hospitality industry, reinforcing its position as the main driver of tourism employment. It is important to note that emerging sectors that could indicate a diversification of the tourism production ecosystem, such as professions linked to digitalisation, sustainability, or consultancy, are not included in this official classification of activities.

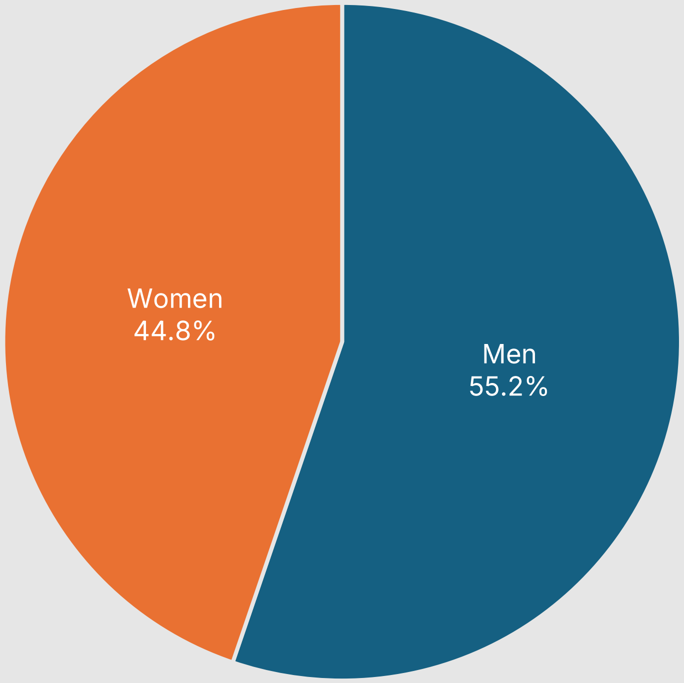
Average number of Social Security affiliations in tourism characteristic activities of in the Canary Islands in 2024



Source: Statistics on Social Security Affiliation by Place of Residence (ISTAC)

The distribution by sex of Social Security affiliates in tourism-characteristic activities in the Canary Islands reveals a slight gender imbalance within the sector. According to 2024 data, men account for 55.2% of affiliates, while women represent 44.8%. Although female participation is significant, the gender gap remains, particularly in higher-skilled and managerial positions, where male representation tends to be more prominent.

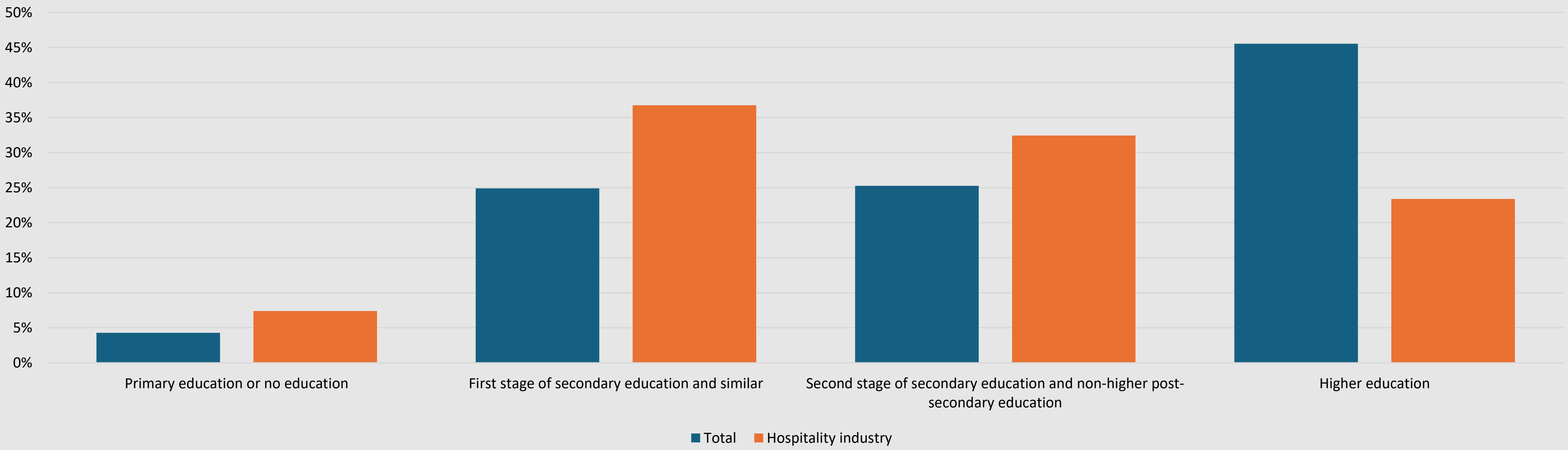
Distribution by sex of Social Security affiliates in activities characteristic of tourism in the Canary Islands in 2024



Source: Statistics on Social Security Affiliation by Place of Residence (ISTAC)

The educational structure of the employed population in the hospitality sector in the Canary Islands reveals lower levels of qualification compared to the regional labour market as a whole. According to the Canary Islands Household Income and Living Conditions Survey (ISTAC), in 2022, 36.7% of hospitality workers had completed only lower secondary education or equivalent, nearly 12 percentage points above the general average (24.9%). Conversely, only 23.4% of employees in the hospitality sector held higher education qualifications, compared to 45.5% in the overall employed population. This disparity reflects a lower demand for formal education within the sector, which may affect factors such as job temporality, wage levels, and opportunities for career advancement. These figures highlight the need to strengthen targeted training and professional development opportunities in the tourism sector, with the aim of improving job quality and enhancing competitiveness.

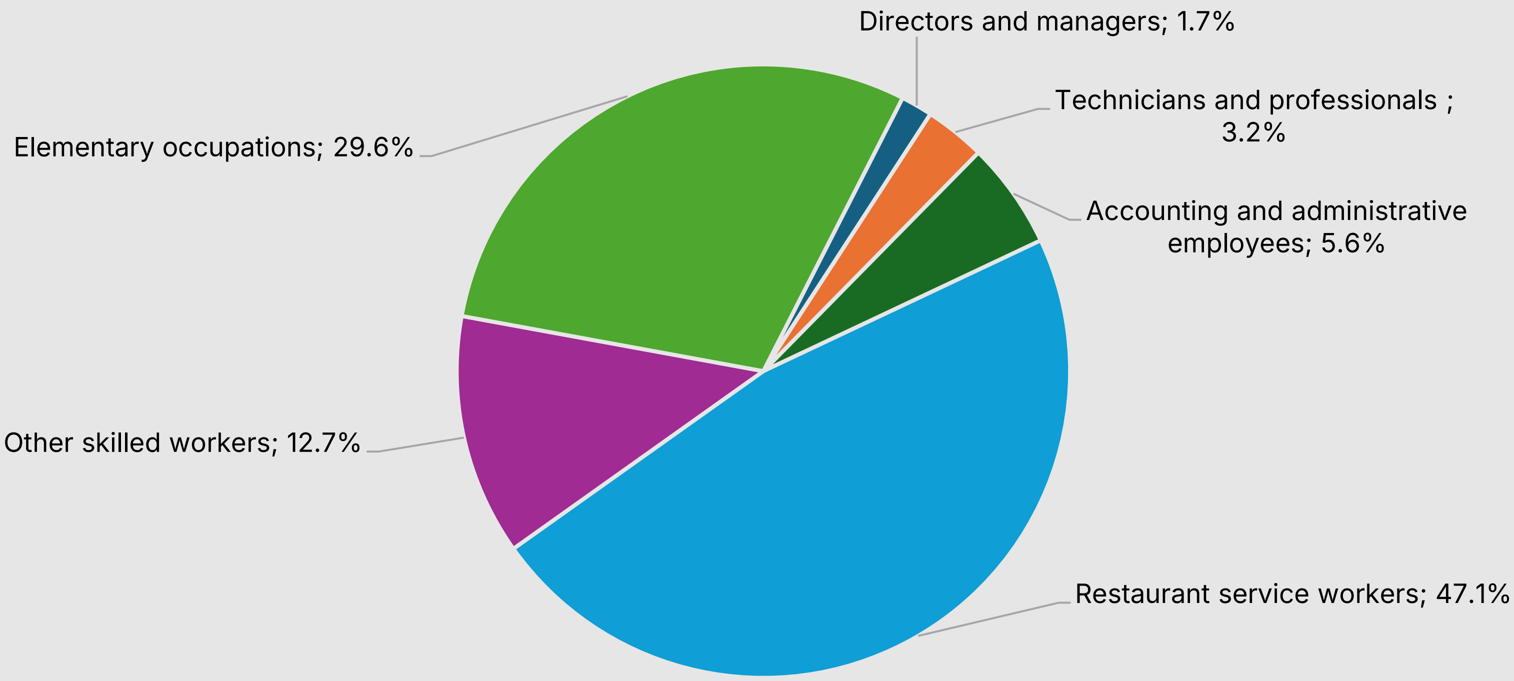
Population aged 16 and over employed in the hospitality industry and total, according to level of education in the Canary Islands in 2022



Source: Survey of Income and Living Conditions of Canary Islands Households (ISTAC)

The hospitality sector in the Canary Islands is dominated by "restaurant service workers", who accounted for 47.1% of employment in the activity, followed by "elementary occupations" at 29.6% and "other skilled workers" at 12.7%. In contrast, the least represented groups were "managers and directors" (1.7%), "technicians and professionals" (3.2%), and "clerical and administrative employees" (5.6%), reflecting a sector largely composed of low-skilled occupations.

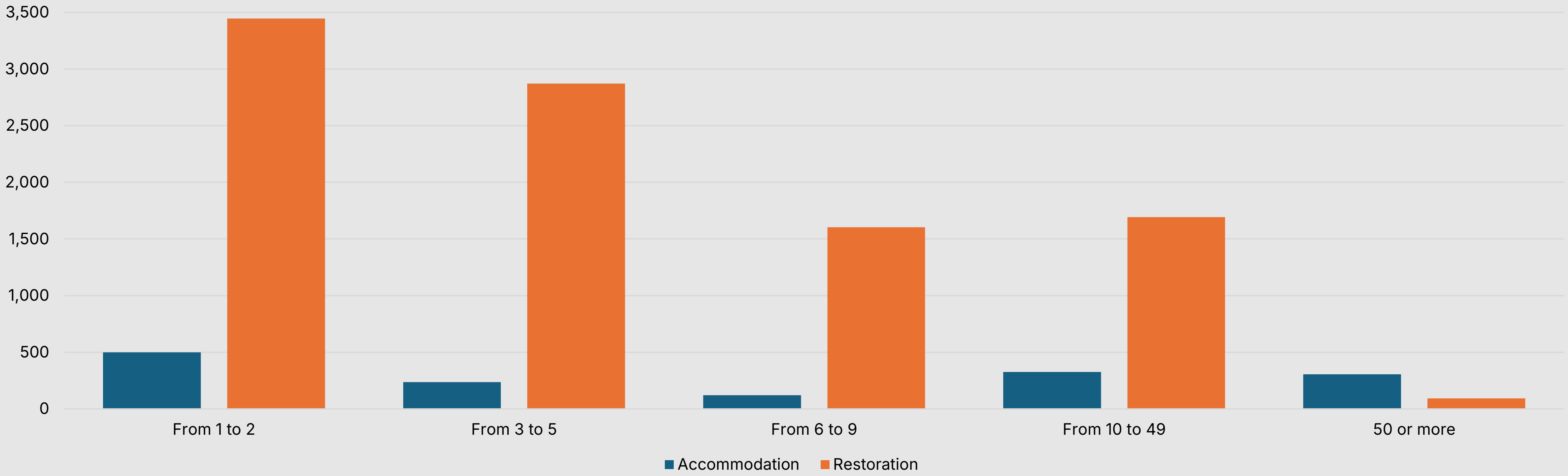
Percentage distribution of occupational groups in the hospitality sector in the Canary Islands in 2022



Source: Survey of Income and Living Conditions of Canary Islands Households (ISTAC)

Most accommodation and food service businesses in the Canary Islands had fewer than 10 employees, with food establishments particularly concentrated in the 1–2 and 3–5 employee brackets. In contrast, accommodation businesses show a more balanced distribution across different size segments, with fewer companies overall but a greater presence among larger firms. The presence of businesses with 50 or more employees is notably low in the food service sector, whereas in accommodation there are 306 companies of this size.

Accommodation and restaurants companies registered with Social Security in the Canary Islands, by number of employees (December 2024)

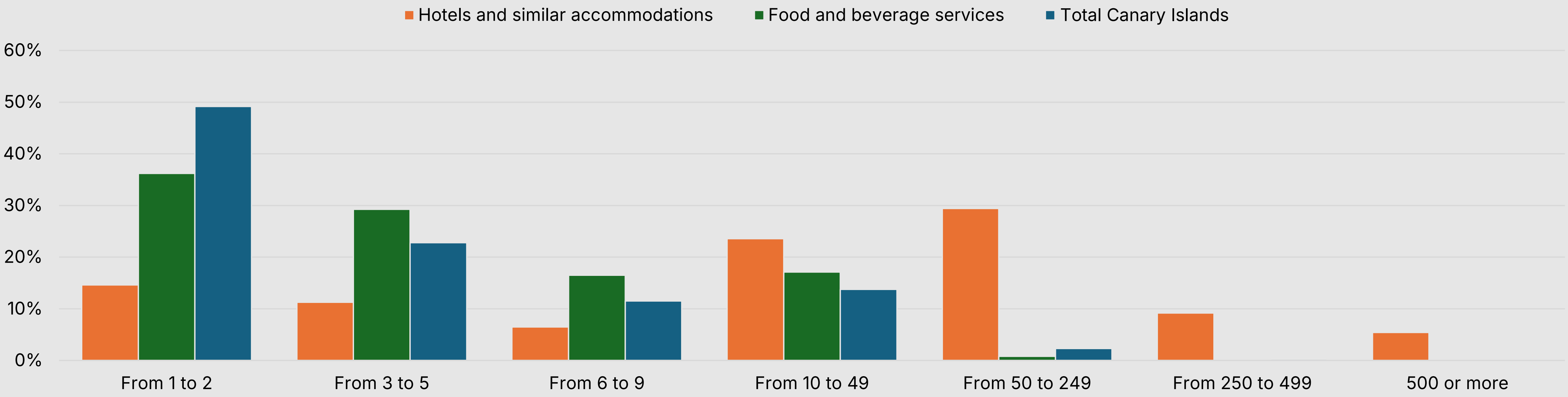


Source: Statistics on Companies Registered with Social Security (ISTAC)

Within the accommodation sector, hotels stand out for their high number of employees. In general, the Canary Islands' economy is characterised by a productive sector dominated by microenterprises. Nearly half of all businesses in the region have between 1 and 2 workers, and 23% employ between 3 and 5 people. This trend is especially true in the food and beverage services sector (bars, restaurants, and cafés), which mostly operate with fewer than 10 employees.

However, hotel establishments within the tourism sector show a significant presence in the larger workforce brackets. The importance of the 250–499 and 500 or more employee categories among hotel businesses highlights the relevance of large enterprises in this activity. Although hotel establishments represent only 0.8% of all businesses in the Canary Islands, they account for 24% of the companies with 250 or more employees.

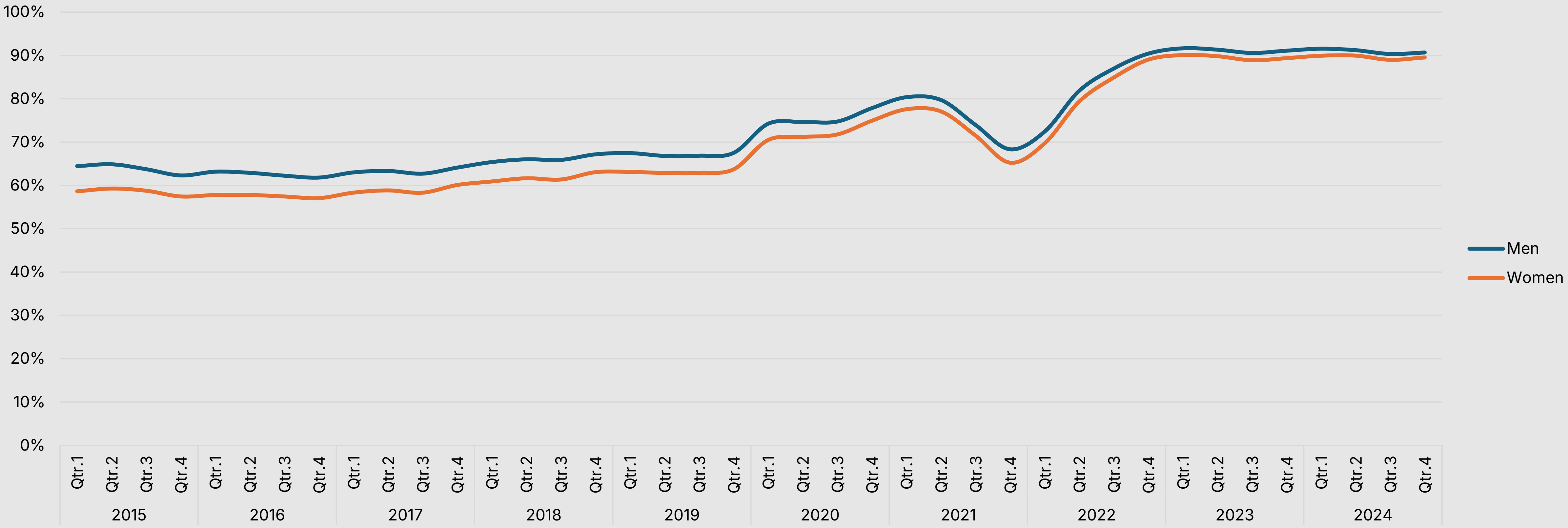
Percentage of establishments by number of employees in various economic activities



Source: Statistics on Companies Registered with Social Security (ISTAC)

Employment stability in the tourism sector has improved in recent years following the approval of Royal Decree-Law 32/2021 on urgent measures for labour reform, job stability and labour market transformation. As a result, the temporary employment rate has dropped to 10%, although it is worth noting that the proportion of employees on permanent intermittent contracts has increased, from 3.9% in 2021 to 6.4% of total affiliations in 2024.

Percentage of affiliates in the Ordinary General Regime with indefinite and permanent intermittent contracts, out of the total number of affiliates in activities characteristic of tourism in the Canary Islands

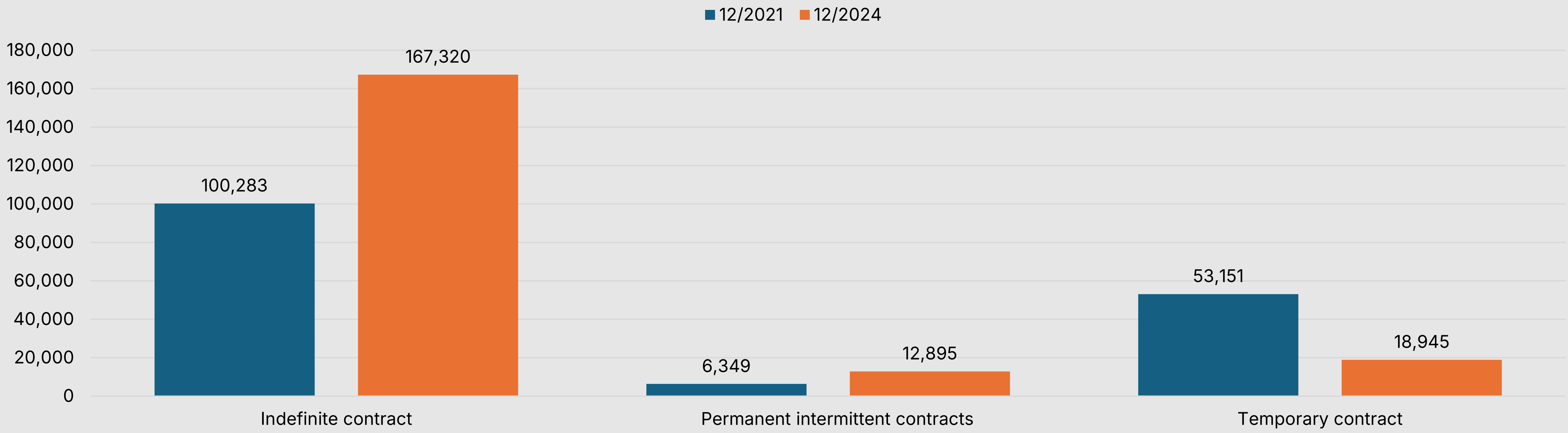


Source: Statistics on affiliations in the General Ordinary Scheme by place of residence (ISTAC)

Types of contracts and professional categories

Between December 2021 and December 2024, employment in tourism-related activities in the Canary Islands underwent a significant transformation in its hiring structure. Permanent contract affiliations rose from 100,283 to 167,320, while permanent *fixed-discontinuous contracts* (permanent contracts with intermittent work) doubled, reaching 12,895. In contrast, temporary contracts experienced a sharp decline, falling from 53,151 to 18,945, reflecting a shift in hiring trends as a result of the regulatory reform.

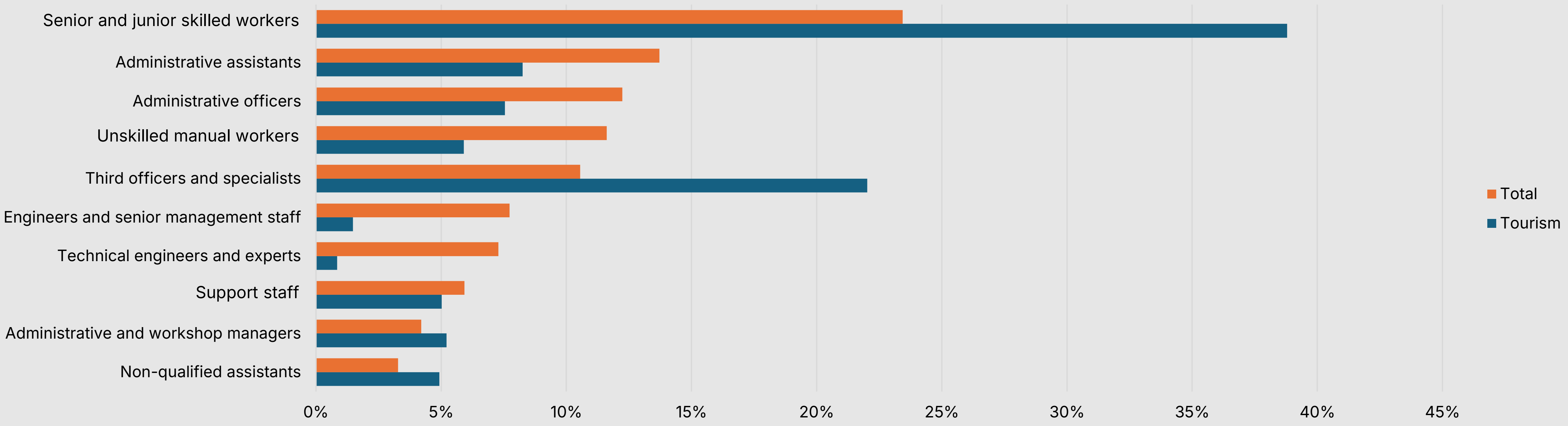
Affiliations in the General Ordinary Regime in the Canary Islands according to contract type in activities characteristic of tourism



Note: data from December 2021 and 2024. Source: Statistics on affiliations in the General Ordinary Scheme by place of residence (ISTAC)

Employment distribution in the Canary Islands shows a marked concentration in occupational categories requiring lower educational levels, with a predominance of first, second- and third-level skilled workers, followed by assistants, administrative staff, and non-qualified aides. In contrast with the broader economy, where the labour structure is more evenly distributed across educational levels, the tourism sector stands out for its clear specialisation in occupations with lower academic requirements, particularly highlighting the underrepresentation of engineers, specialised technicians, and managerial staff.

Distribution of workers by categories in tourism characteristic activities and the whole economy of the Canary Islands in 2024

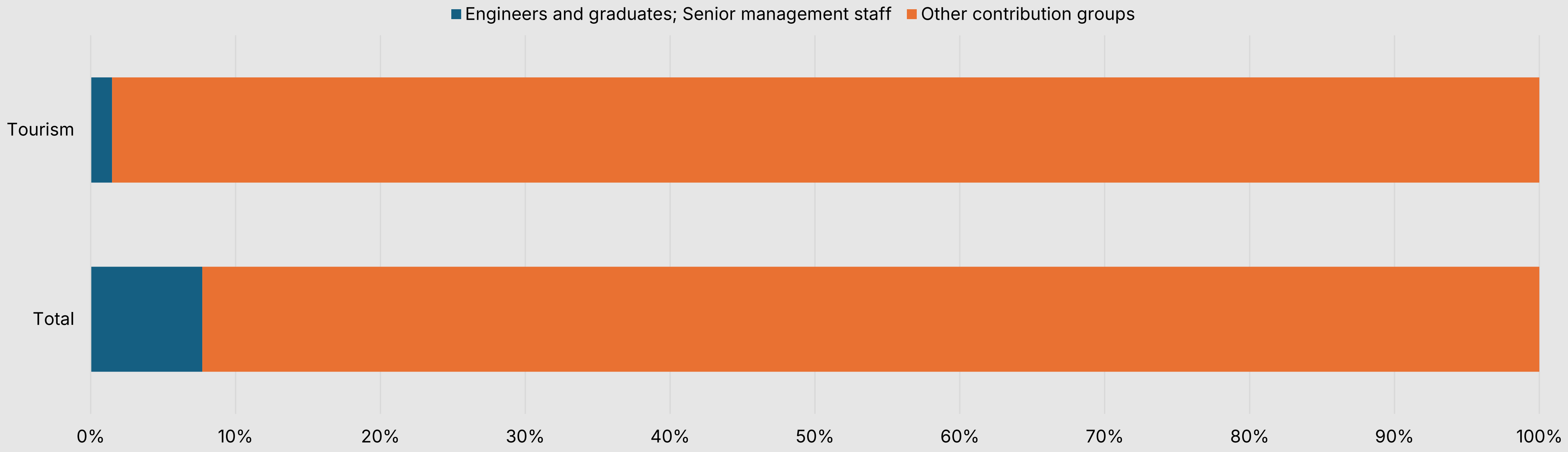


Source: Statistics on Social Security Affiliation by Place of Residence (ISTAC)

The tourism sector in the Canary Islands recorded 2,838 affiliates in highly qualified positions, comprising engineers, graduates, and executive staff, which represents a small proportion of total tourism-related affiliations.

There is a lower presence of highly qualified personnel in the tourism sector compared to other contribution groups.

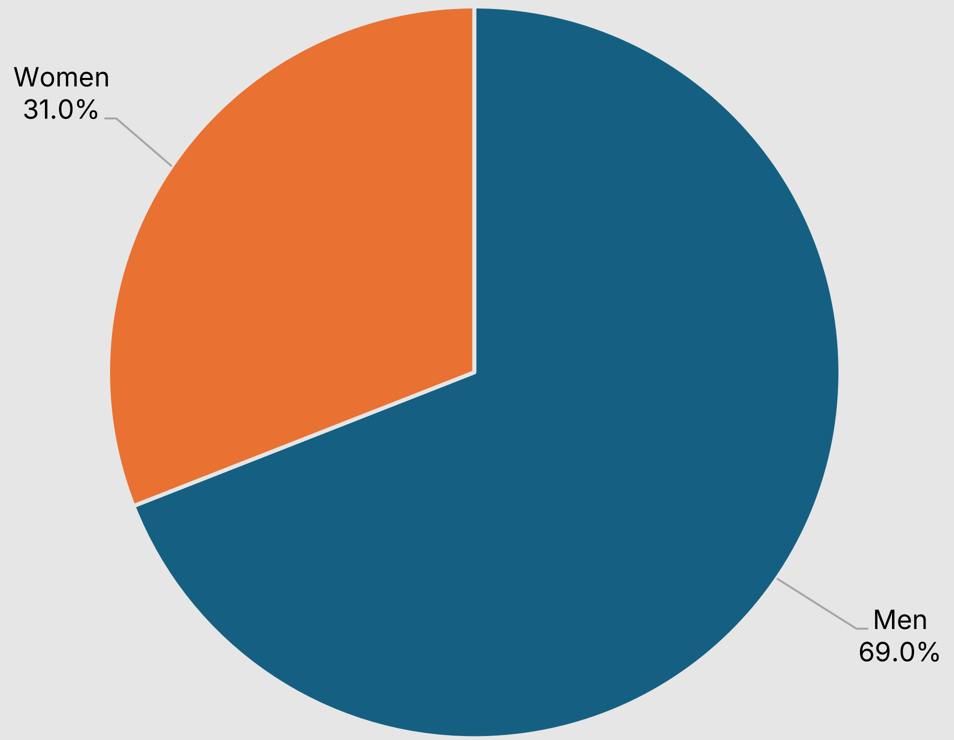
Distribution of contributors by contribution groups, with special emphasis on the most qualified group in the Canary Islands in 2024



Source: Statistics on Affiliations in the General Ordinary Regime by place of residence (ISTAC)

In 2024, men accounted for 69% of affiliates in highly qualified positions within the tourism sector in the Canary Islands, while women represented 31%. This distribution reflects a lower female presence in highly skilled roles compared to their male counterparts.

Distribution by sex of affiliates in the group with the highest qualification in activities characteristic of tourism in 2024

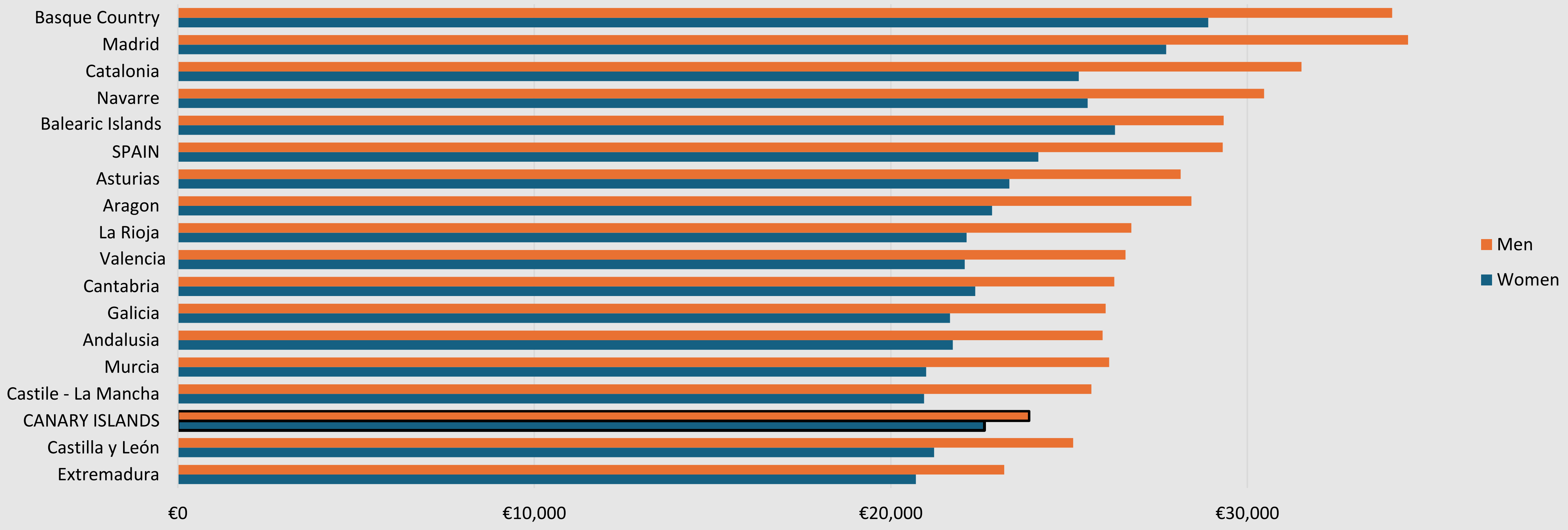


Note: Data from December 2024. Source: Statistics on affiliations in the General Ordinary Scheme by place of residence (ISTAC)

Earnings and wages in the service sector

The average annual earnings per worker in the services sector in the Canary Islands amounted to €23,253 in 2022, compared to €26,721.59 in Spain as a whole (INE, 2022). In this sector, the average annual earnings for women in the Canary Islands stood at €22,627, while for men it was €23,880. These figures are consistent with the 2024 Quarterly Labour Cost Survey published just days before the release of this report, which ranks the Canary Islands as the region with the lowest wages in the country.

Average annual earnings per worker in the service sector by autonomous community in 2022



Source: Annual Wage Structure Survey (INE)

In 2022, the highest average earnings from employment in the Canary Islands were recorded among "directors, managers, and scientific and intellectual professionals," with €2,313.79 per month, followed by "technicians and associate professionals" and "military occupations." At the other end of the scale, the lowest earnings were observed in "sales workers" and "elementary occupations," with €1,021.69 and €1,040.75, respectively. This distribution highlights a pronounced wage gap between high- and low-skilled occupational sectors.

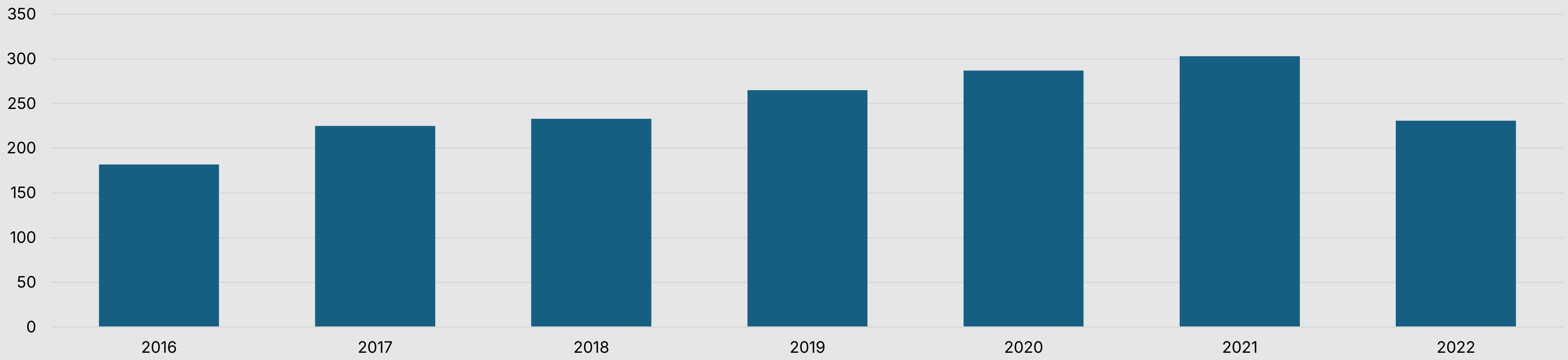
Average income per job according to occupations in the Canary Islands in 2022

Source: Survey of Income and Living Conditions of Canary Islands Households (ISTAC)

Tourism training and job placement

University graduates in Tourism Studies are decreasing, as is the case across Spain (CYD Report 2024). This trend is mirrored in the number of students enrolled in vocational training programmes within the Hospitality and Tourism field. It is worth highlighting the entry into force of the Vocational Training Act (Organic Law 3/2022 of 31 March on the Organisation and Integration of Vocational Training), which mandates the implementation of dual vocational training in all professional fields at both intermediate and higher levels starting in the 2024–25 academic year. This reform entails greater involvement of companies in employment training, as they will actively participate in the learning process of both content and competences. Although there is already some literature on the subject (Marrero-Rodríguez and Stendardi, 2023), it is still too early to fully assess the impact of this law on the tourism sector.

Students who completed their Bachelor's Degree in Tourism at public and private universities in the Canary Islands



Source: University Education Statistics (ISTAC)

In 2023, the employment rate of Tourism graduates in the Canary Islands reached 74.4% two years after graduation and 80.9% five years after. These figures are higher than the overall average for university graduates, which stood at 69% and 78.5% over the same periods. A higher short-term employment rate was observed among women (76.7% compared to 69.6%), although after five years, the rate was higher among men (83.6% compared to 79.9%).

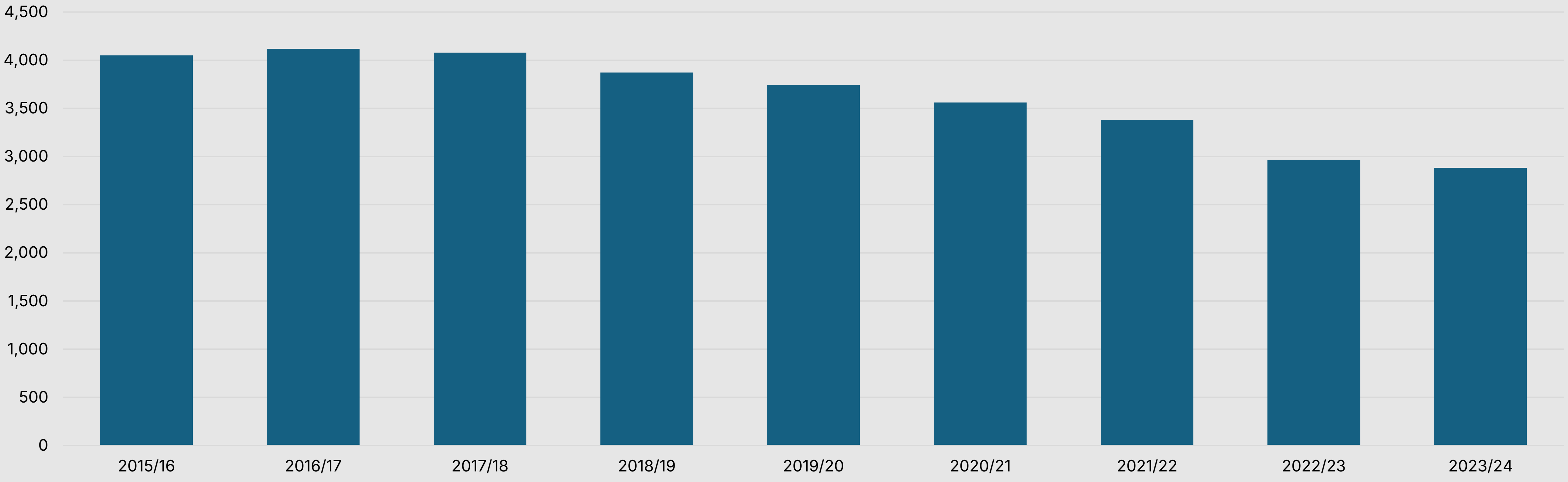
Labour insertion rate in the Canary Islands of graduates from public universities in 2023

	2 years after graduation (2021)			5 years after graduation (2018)		
	Total	Men	Women	Total	Men	Women
Bachelor's Degree in Tourism	74.4%	69.6%	76.7%	80.9%	83.6%	79.9%
Total	69.0%	68.2%	69.4%	78.5%	77.6%	79.0%

Source: Labour Insertion Statistics (ISTAC)

The number of students enrolled in vocational training programmes in the Hospitality and Tourism field in the Canary Islands has shown a downward trend in recent years. After remaining stable between 2015 and 2019, enrolment began to decline progressively, with a more pronounced reduction in the most recent academic years, possibly indicating a lower demand for training in this field.

Students of training cycles in the hospitality and tourism family in public, subsidized and private centres in the Canary Islands according to school year

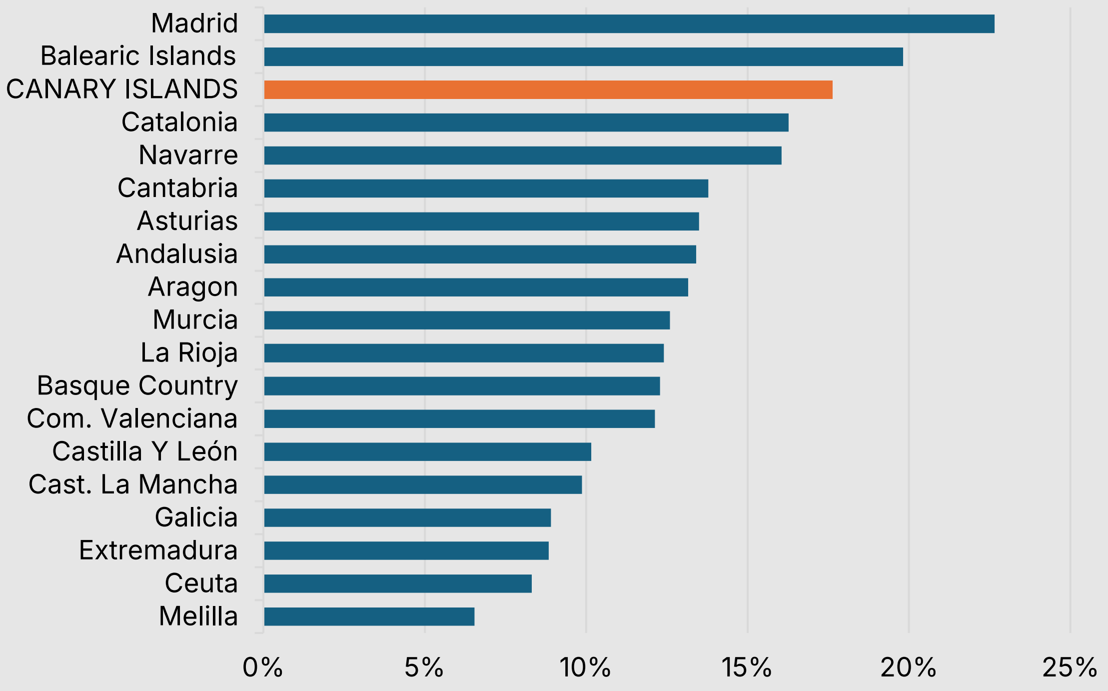


Source: Ministry of Education, Vocational Training, Physical Activity and Sports of the Government of the Canary Islands

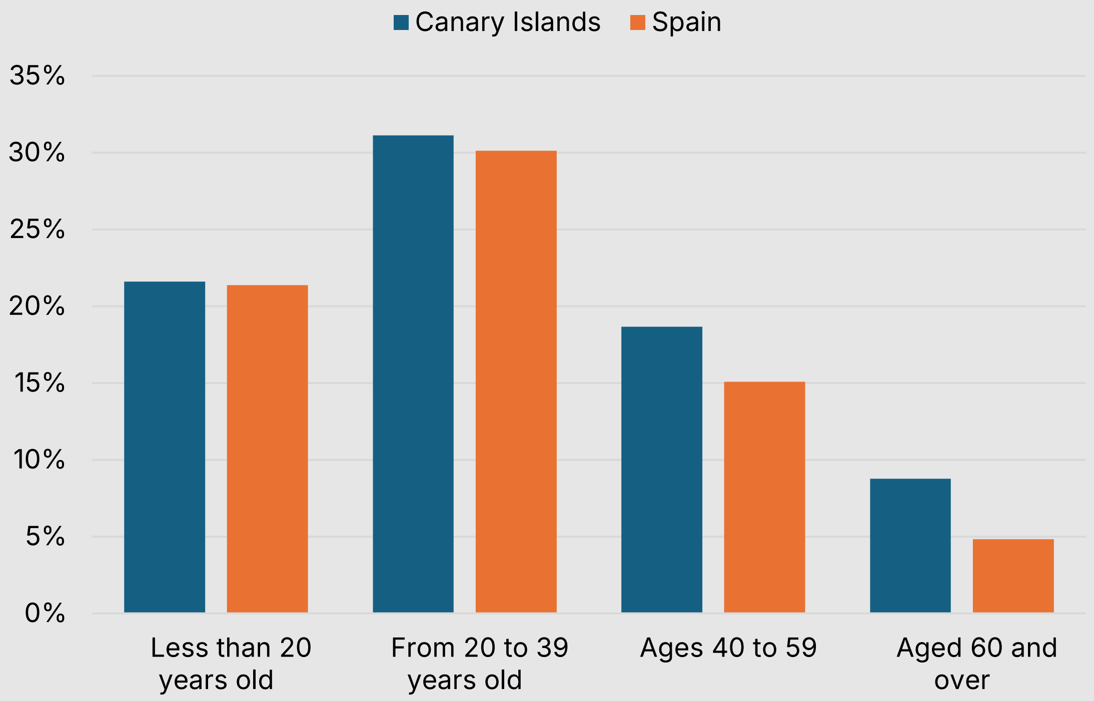
Language skills

The Canary Islands rank among the Spanish autonomous communities with the highest percentage of people who report speaking English well, behind only Madrid and the Balearic Islands. However, this percentage remains insufficient for a tourism-oriented destination like the Canary Islands. When analysing language proficiency by age group, the data shows that in the Canary Islands, the percentage of people who report understanding English is higher than the national average in older age groups, while among younger cohorts, the figures are clearly inadequate for an economy so open to the world.

People who declare that they speak English well by Autonomous Communities in 2021



People who understand English according to age groups



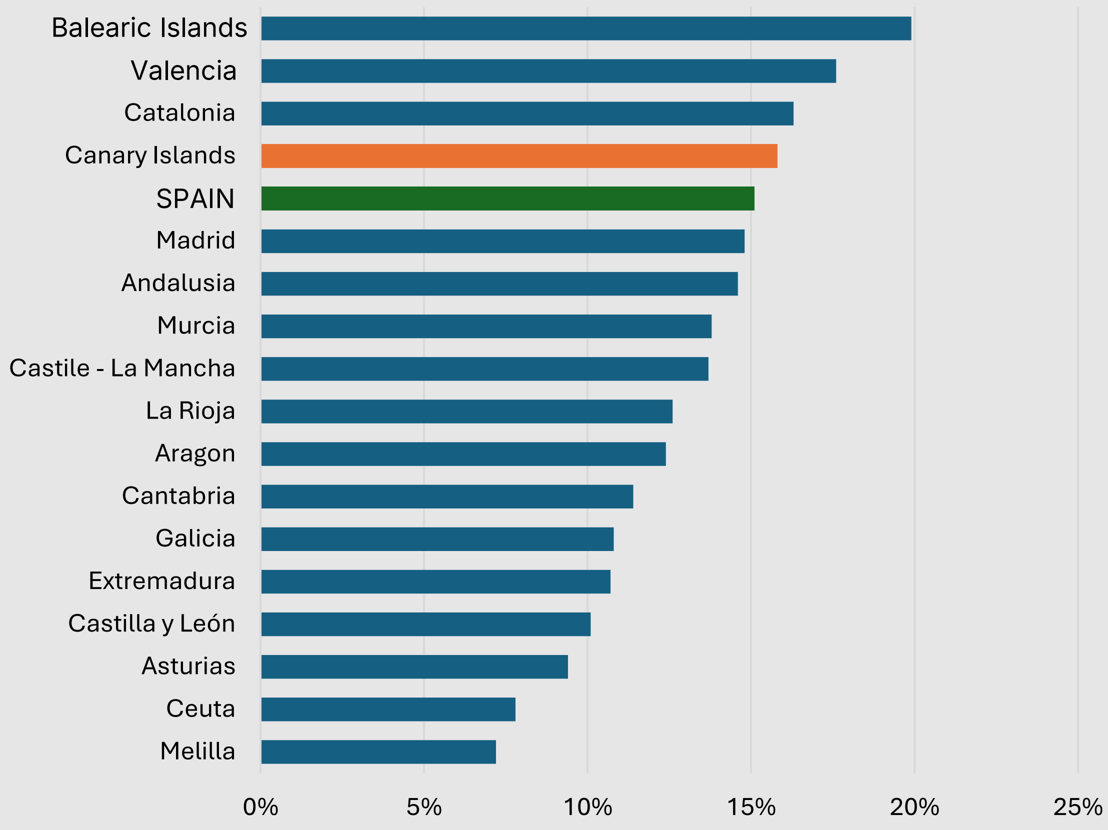
Note: There are 4 different aspects ("Speak", "Understand", "Read", "Write"), for which there are 3 possible answers ("Nothing", "With difficulty", "Good"). For the graph on the left, the "Speech" aspect has been selected. For the graph on the right, the "Understand" aspect has been selected. The data is related to the % of people who have selected the answer "Good". Source: Survey of Essential Characteristics of the Population and Housing (INE)

The impact of housing on the labour market

The increase in rental prices in the Canary Islands, with a 15.8% rise between 2015 and 2022, poses a significant challenge for tourism sector workers, who generally earn below-average wages and face growing difficulties in accessing affordable housing. This rise in housing costs not only reduces the purchasing power of sector employees but may also lead to labour shortages in key tourist destinations by forcing workers to live further away from their workplaces, increasing commuting time, transport costs, and road traffic congestion.

In addition, the growth of holiday rentals has further strained the housing market, shifting part of the residential housing stock towards tourism-related uses, thus reducing the supply available to local residents and driving up rental prices. This phenomenon directly impacts job stability and the quality of life of tourism employees, who often must share accommodation or allocate a significant portion of their income to rent. From a tourism sustainability perspective, this trend threatens the balance between the economic development of the sector and the well-being of the local population.

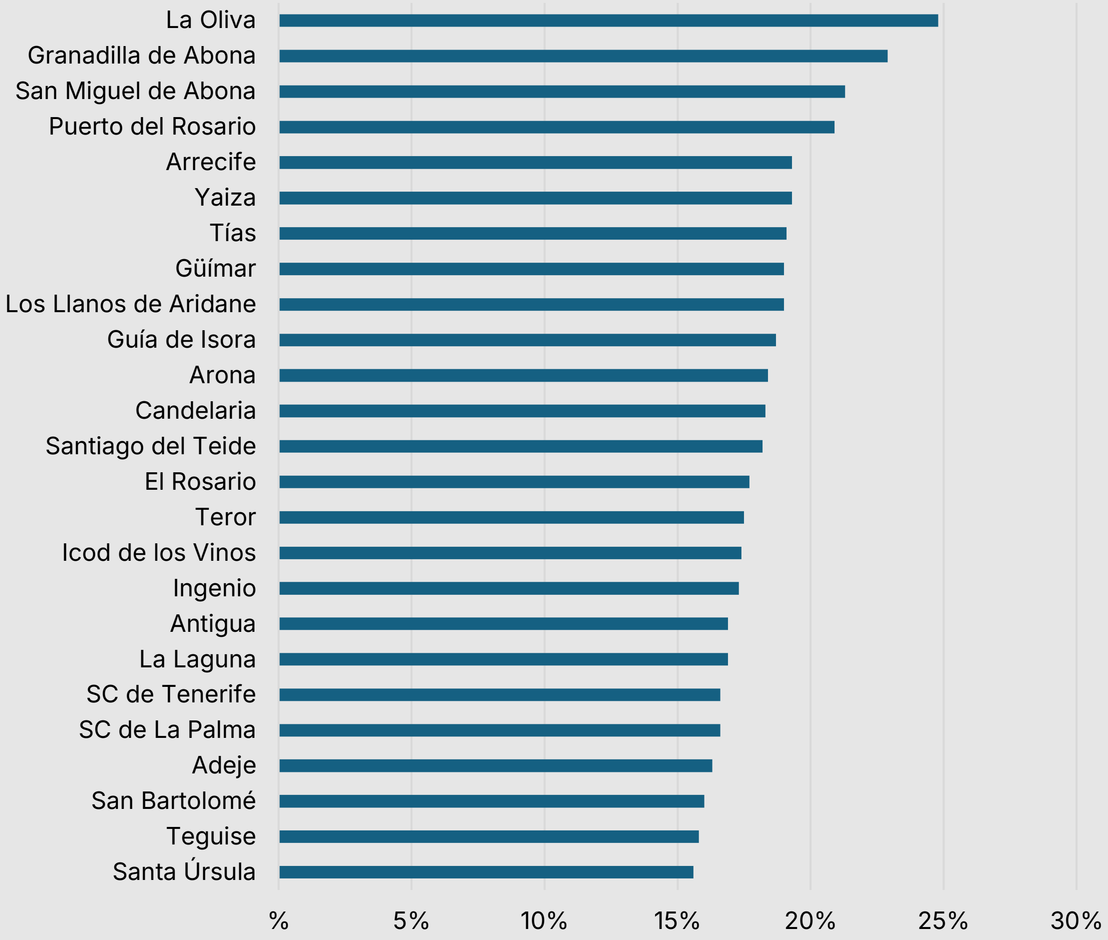
Variation between 2015 and 2022 in the rental price of conventional housing by autonomous communities



Source: Rental Housing Price Index - IPVA (INE)

Between 2015 and 2022, conventional rental housing prices in the Canary Islands recorded a significant cumulative growth rate across various municipalities. La Oliva tops the list with the highest increase, followed by Granadilla de Abona and San Miguel de Abona, reflecting intense pressure in high-demand areas. Overall, municipalities in Tenerife, Fuerteventura, and Lanzarote show the most pronounced price increases.

Variation between 2015 and 2022 in the rental price of conventional housing in the municipalities with the highest rate of change



Source: Rental Housing Price Index - IPVA (INE)

Labour skills, entrepreneurship and employment

Indicator	Description	Availability	Fountain	Remarks
Employment in tourism	Employment in tourism, distribution by gender, age, inclusion of people with disabilities. Employment must be measured from a supply-side approach and through a demand-side approach.	Available	Occupancy of Tourist Accommodation Establishments (Eurostat) Unemployment rates (Eurostat) Labour Force Survey (INE) Social Security Affiliation Statistics by Place of Residence (ISTAC) Survey of Income and Living Conditions of Canarian Households (ISTAC) Annual Salary Structure Survey (INE) Statistics on Companies Registered with Social Security (ISTAC) Statistics on affiliations in the General Ordinary Scheme by place of residence (ISTAC)	
English Language Proficiency		Available for 2021	Survey of Essential Characteristics of the Population and Housing (INE)	The only available and comparable data on language knowledge is based on the respondent's own perception.
Excess and lack of qualifications in tourism		Available	Statistics on affiliations in the Ordinary General Scheme by place of residence (ISTAC) Ministry of Education, Vocational Training, Physical Activity and Sports of the Government of the Canary Islands	
Graduates in Tourism and vocational training cycles in Hospitality and Tourism and relationship with economic activity/ Job placement rate		Available	Statistics on University Education (ISTAC) Labour Insertion Statistics (ISTAC)	
Companies created by women out of the total number of companies in Hospitality and Tourism		Unavailable		
Availability of rental accommodation for workers in tourist areas (or similar) Housing Price Index (INE)		Partially available	Rental Property Price Index - IPVA (INE)	
Startup creation and survival index in tourism		Unavailable		

4.6

Digitalisation, knowledge and smart tourism

Introduction

Digitalisation, knowledge, and smart tourism have become essential tools for ensuring the sustainability of the tourism sector, particularly in destinations with high tourism dependency, such as the Canary Islands. Digital transformation not only enhances the competitiveness of tourism businesses but also enables more efficient resource management, reducing environmental impact and promoting responsible practices.

One of the main benefits of digitalisation is the optimisation of operational processes within the tourism sector. The adoption of technologies such as artificial intelligence, data analytics, and automated management systems allows hotels, airlines, travel agencies, and tour operators to improve energy efficiency, reduce resource waste, and minimise their ecological footprint. This is particularly important in an island territory like the Canary Islands.

In addition, the implementation of digital solutions in the sector improves communication with tourists and encourages more responsible behaviour. Mobile apps, virtual assistants, and interactive information platforms can provide personalised recommendations on sustainable activities, responsible consumption practices, and eco-friendly transport options. In this way, tourists can make informed decisions aligned with sustainability principles.

Another key aspect of digitalisation in tourism is its contribution to diversifying the offer. Through e-commerce, virtual reality, and immersive experiences, tourism businesses can develop products and services that reduce reliance on seasonal and mass tourism. In the Canary Islands, this diversification is essential to ensure the sector's resilience in the face of challenges such as climate change and fluctuations in demand.

Digitalisation in the Canary Islands

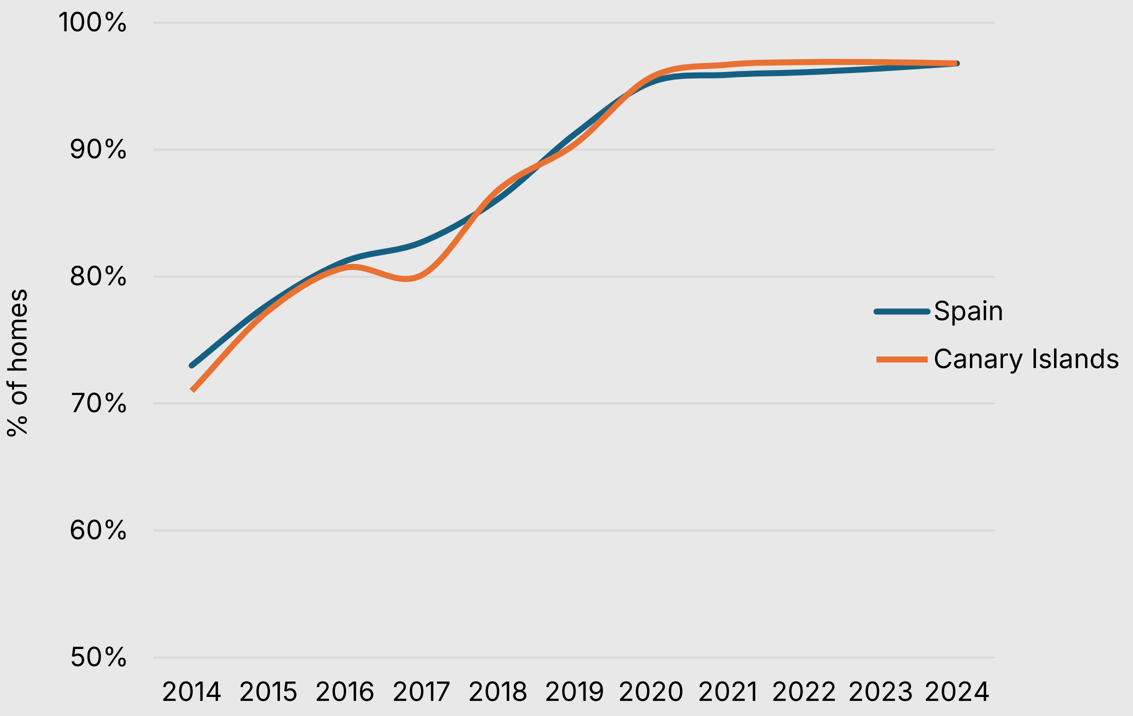
The high level of internet access in the Canary Islands, reaching 97% of households in 2024, is a key factor in promoting tourism sustainability across the archipelago. Digitalisation can support the decentralisation of tourism by encouraging a better distribution of visitor flows to less saturated areas through apps and platforms offering real-time information on accommodation, transport, and activities in under-visited locations.

Connectivity also enables the optimisation of tourism resources, facilitating the implementation of smart management technologies in hotels, holiday rentals, and public spaces. Energy efficiency systems, water consumption monitoring, and environmental impact measurement tools can all help reduce the ecological footprint of tourism on the islands.

From a sustainable mobility perspective, real-time access to public transport information and shared mobility options (such as bicycles, e-scooters, or low-emission rental vehicles) can encourage alternatives to private car use, helping to reduce congestion and pollution.

Digitalisation also enhances the tourist experience and communication with local communities, fostering a more responsible tourism model that is better aligned with the destination's needs. In this context, the expansion of digital connectivity should be strategically leveraged to move towards a more balanced, efficient, and environmentally respectful tourism model, in line with the sustainability and resilience principles required for the future of the sector in the Canary Islands.

Evolution of Internet access in primary homes in the form of broadband connection



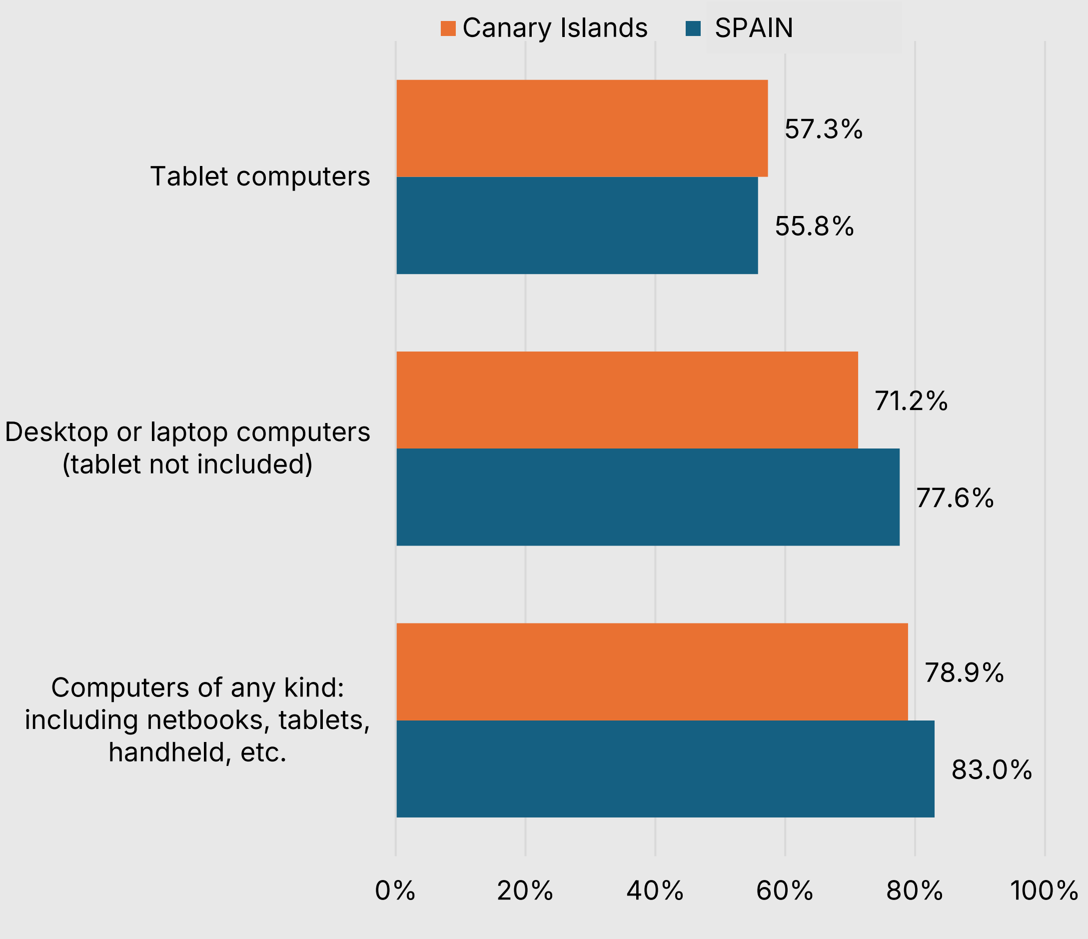
Source: Survey on equipment and use of information and communication technologies in households, 2024 (INE)

The percentage of households equipped with technological products in the Canary Islands stands at 78.9%, slightly below the national average in Spain. In a context where digitalisation has become a key factor for economic development and quality of life, addressing this gap is essential through policies and initiatives that promote access to and use of information and communication technologies (ICT) in Canarian households.

The adoption of digital technologies facilitates access to booking platforms, tourist assistance services, and interactive tools that enhance the visitor experience. Greater digitalisation at the household level can contribute to the development of smart tourism, fostering a more efficient and sustainable management of the archipelago's tourism resources.

It is therefore necessary to implement strategies to encourage the adoption of digital technologies in households, including subsidies for device acquisition. A coordinated effort in digitalisation will strengthen the Canary Islands' competitiveness in both the technological and tourism sectors.

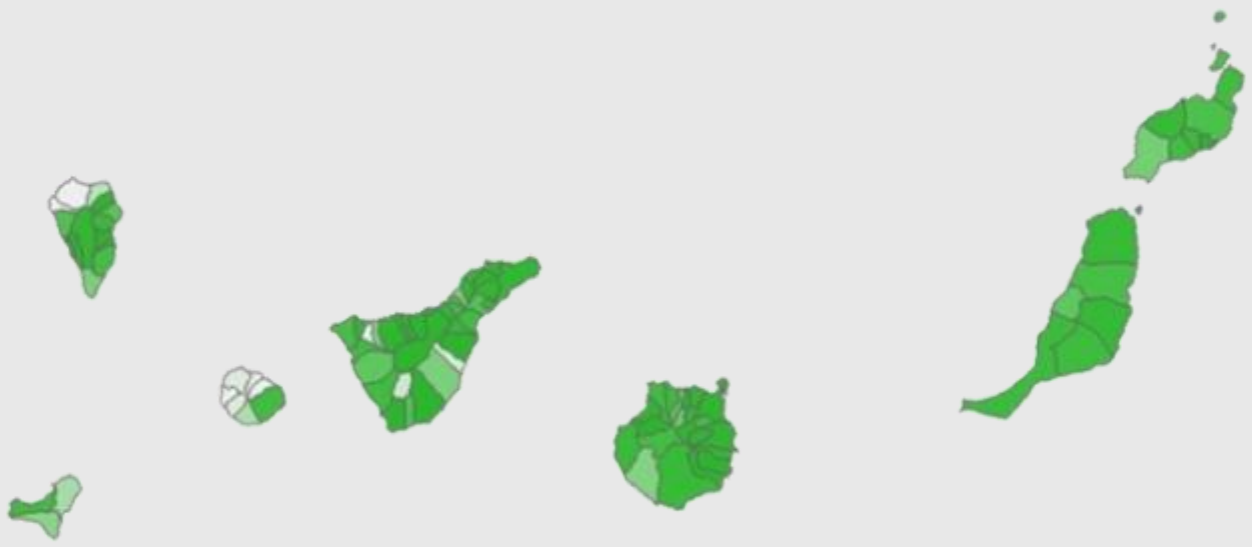
Homes equipped with ICT products



Source: Survey on equipment and use of information and communication technologies in households, 2024 (INE)

5G coverage in the Canary Islands is unevenly distributed across municipalities, with a notable concentration in the main urban areas of Tenerife, Gran Canaria, Lanzarote, and Fuerteventura. In contrast, the so-called green islands, La Palma, La Gomera, and El Hierro, have more limited connectivity. This situation reflects progress in the digitalisation of the archipelago, but it also highlights challenges in ensuring equal access to high-speed networks. These disparities may affect digital competitiveness and the development of technological services in less populated areas, where expanding 5G infrastructure presents an opportunity to boost digitalisation and enhance the competitiveness of the tourism sector, particularly in emerging and rural municipalities.

Mobile 5G (NR+DSS) coverage in the Canary Islands by municipality in 2023



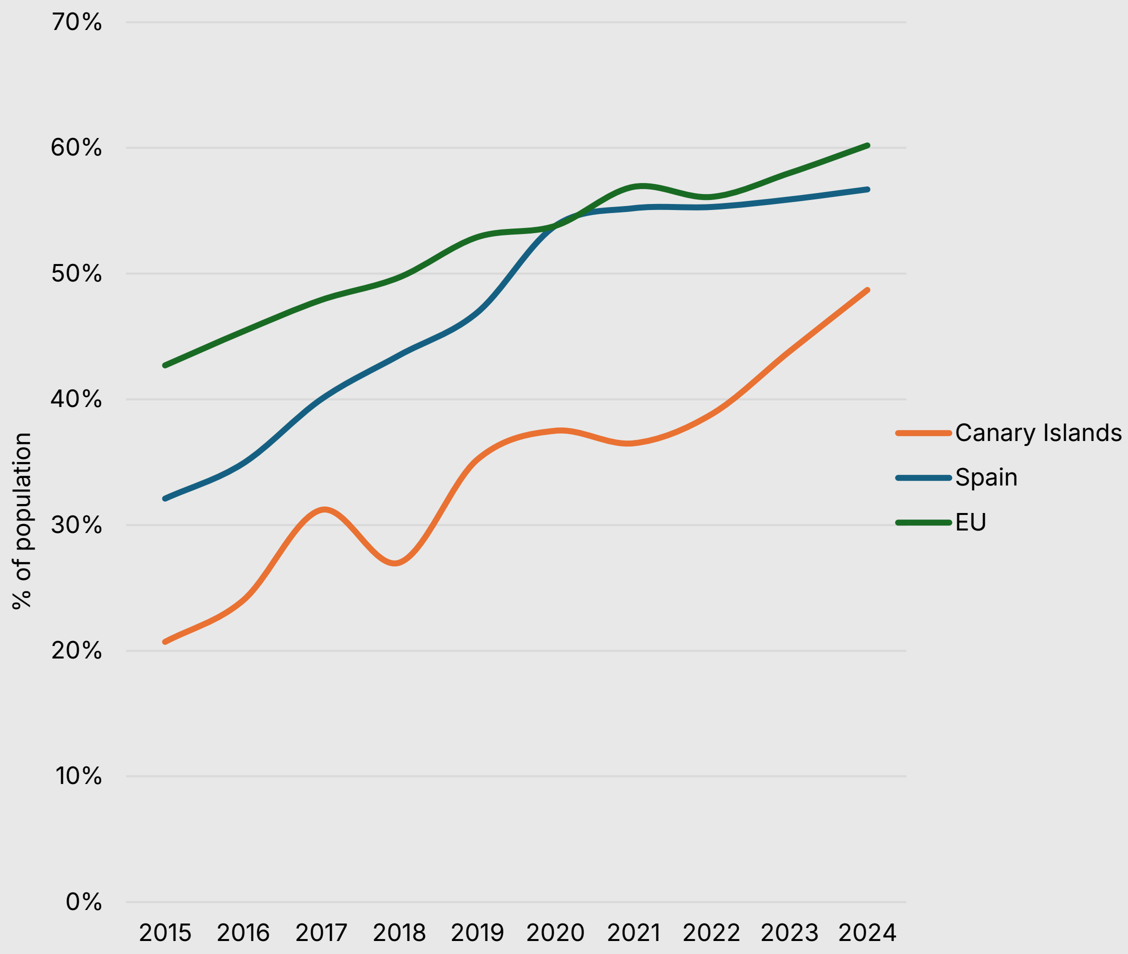
Note: Colour intensity indicates better or worse 5G connectivity. Source: Canary Islands Telecommunications Observatory, based on data from the Ministry for Digital Transformation and Public Function

E-commerce has experienced steady growth in recent years, becoming a key element in consumer habits, although with notable differences in the Canary Islands. The European average leads this trend, reaching 60% in 2024, while Spain follows a similar trajectory, standing at 57% and gradually closing the gap with Europe. In 2020, a peak in online shopping was observed, reflecting how lockdown measures accelerated the digitalisation of consumption amid restrictions on physical retail.

In the Canary Islands, demand has grown significantly over the past decade, yet online commerce penetration remains lower compared to Spain and the EU. Although the percentage of online shoppers rose from 20.7% in 2015 to 48.7% in 2024, the gap with the rest of the country and Europe remains considerable. This is largely due to factors such as the exclusion of the archipelago from many major e-commerce platforms' delivery options, higher associated costs, and longer delivery times.

Nevertheless, the situation has gradually improved in recent years, with more companies expanding their shipping services to the Canary Islands and optimising logistics. This progress has made a more accessible and competitive offering available to consumers, in turn driving increased demand. Despite sustained growth in digital commerce, which currently stands 11 percentage points below the European average, these barriers continue to hinder its full consolidation in the region.

Evolution of the population that buys online



Source: Canary Islands Telecommunications Observatory, based on data from the INE and Eurostat

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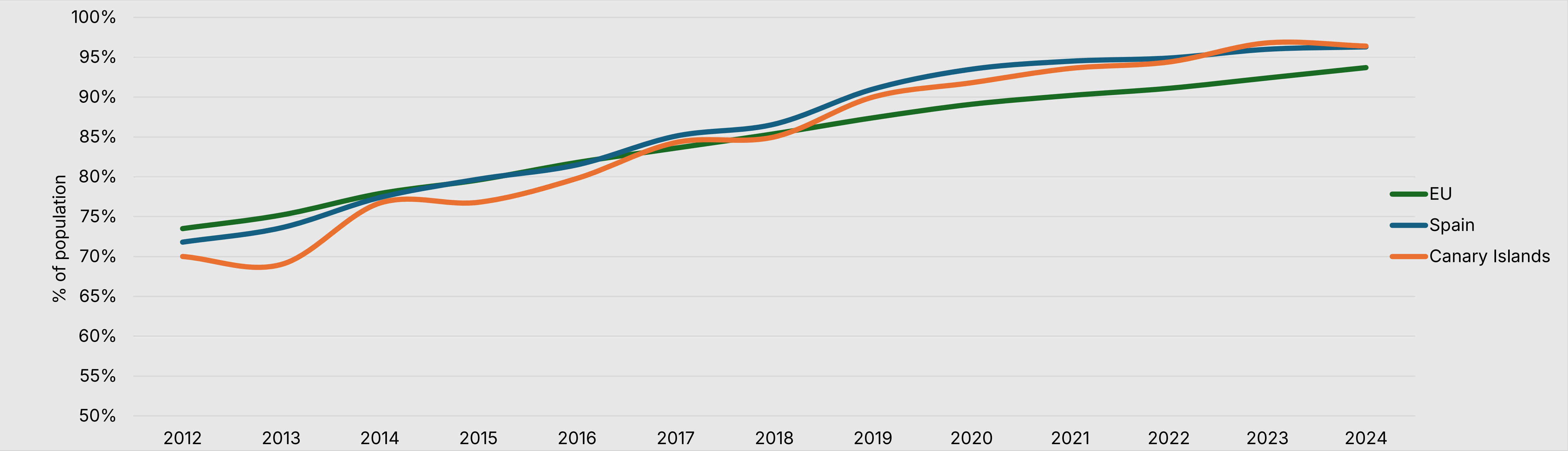
The Canary Islands recorded the lowest rate of internet access in 2012, but have experienced sustained growth over the past decade, reaching parity with the Spanish average from 2018 onwards and maintaining a slightly higher growth rate through to 2024. This trend reflects the expansion of digital connectivity across the archipelago, driven by improvements in infrastructure and increased demand for technological devices. In contrast, the European Union has shown a more stable trajectory, with a slower growth rate, now positioned below both Spain and the Canary Islands in recent years. This suggests that internet access in the EU has reached a point of maturity and stabilisation. The growth of connectivity in the Canary Islands is closely linked to an increasing need for digitalisation in key sectors such as tourism and commerce, where digital transformation is essential to maintaining the archipelago's international competitiveness.

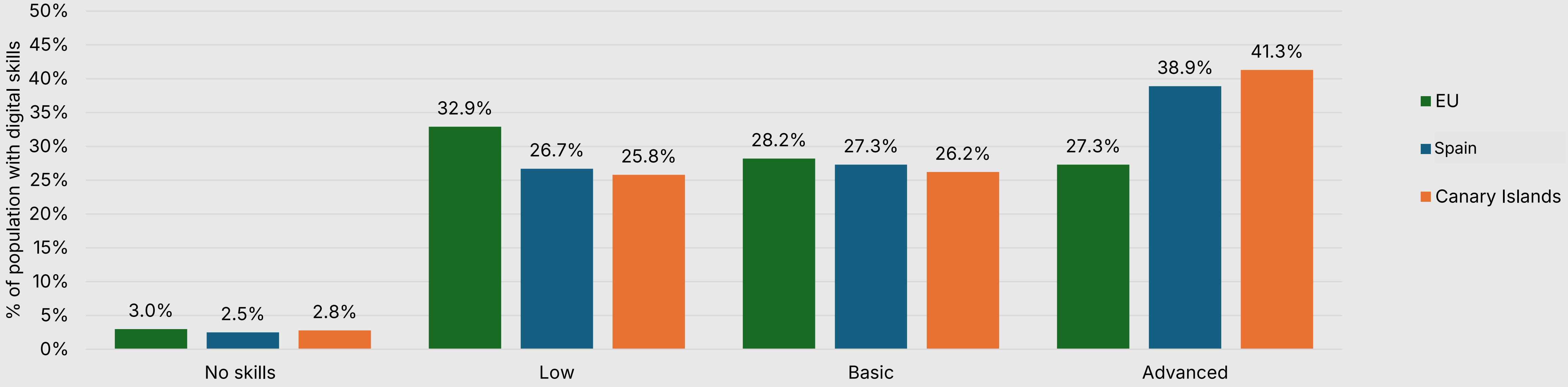
Evolution of internet use by the population aged 16 to 74



Source: Canary Islands Telecommunications Observatory, based on Eurostat for EU data, INE for data from Spain and the Canary Islands

The percentage of people without digital skills is similar across all regions, ranging between 2.5% and 3%, indicating that digital exclusion is relatively low. Meanwhile, the Canary Islands report slightly lower than average national and European figures for low (25.8%) and basic (26.2%) digital skills, suggesting that a significant portion of the population is still at early stages of digital literacy. Notably, the archipelago stands out for its high share of the population with advanced digital skills, reaching 41.3%, surpassing both the Spanish average (38.9%) and the European average (27.3%). This points to a stronger digital specialisation in the Canary Islands, likely linked to growing digitalisation in strategic sectors such as tourism and e-commerce. The relatively lower proportion of the population with basic and low digital skills highlights the need to strengthen digital literacy through training initiatives and access to digital competencies. Expanding these opportunities will enable a greater share of the population to meet current demands in employment, education, and economic development.

Population aged 16-74 with digital skills in 2023

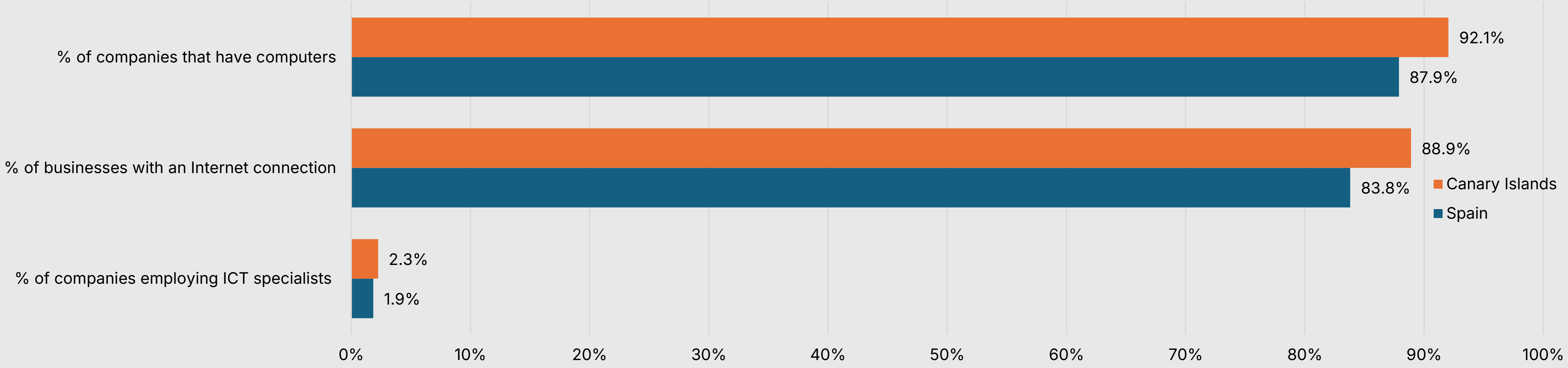


Source: Canary Islands Telecommunications Observatory, based on Eurostat for EU data and INE for data from Spain and the Canary Islands

The digitalisation of the business sector in the Canary Islands

In terms of ICT use in businesses, the Canary Islands show figures similar to the national average, with some notable differences. The archipelago records a higher percentage of companies with access to computers, internet connectivity, and a slightly greater presence of ICT specialists within firms. This reflects an increasingly digitalised business environment, supported by a technological infrastructure that fosters the modernisation of processes and enhances the competitiveness of the productive base, particularly among SMEs.

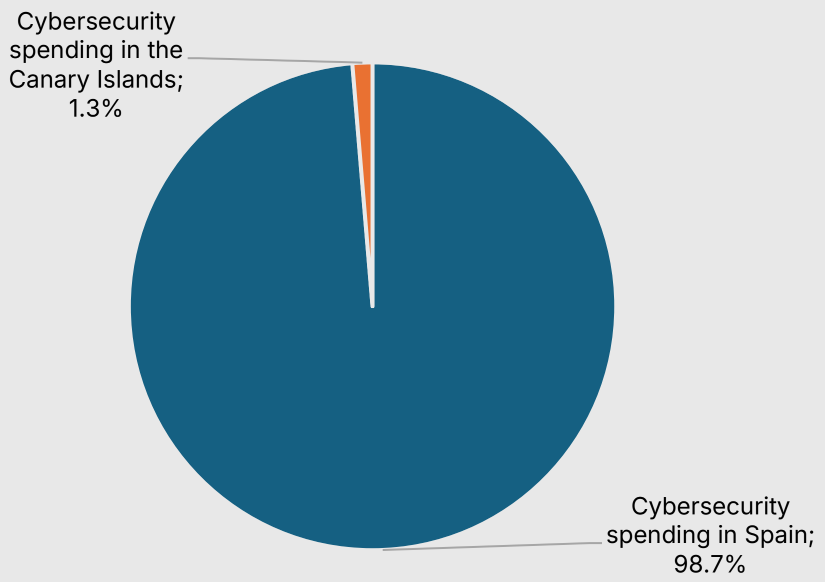
Use of ICT in companies with fewer than 10 employees in the Canary Islands compared to the total for Spain in 2024



Note: The values correspond to the first quarter of 2024. Source: Survey on the use of ICT and e-commerce in companies (INE)

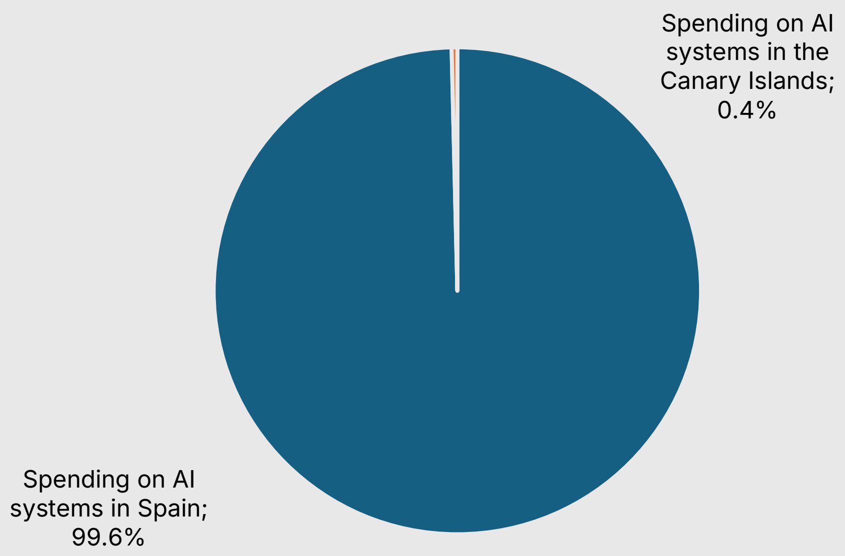
Business spending in the Canary Islands on strategic areas such as cybersecurity and artificial intelligence represents a minimal share of the national total, highlighting a clear gap in technological investment across the archipelago. In terms of cybersecurity, Canarian companies account for just 1.3% of total spending in Spain, reflecting a lower prioritisation of digital protection, an increasingly critical issue in an environment heavily reliant on IT security. This is particularly relevant in the Canary Islands, where the tourism sector manages large volumes of sensitive data and demands ever-higher standards and investment in digital security. The gap is even more pronounced in artificial intelligence, where the Canary Islands represent only 0.4% of national expenditure, revealing a very limited adoption of this technology within the business base. This underinvestment may restrict the competitiveness of local companies in a market that is rapidly moving toward automation, process optimisation, and data-driven management.

Share of the Canary Islands in total business spending on cybersecurity in Spain in 2023



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

Share of the Canary Islands in total business spending on artificial intelligence systems in Spain in 2023

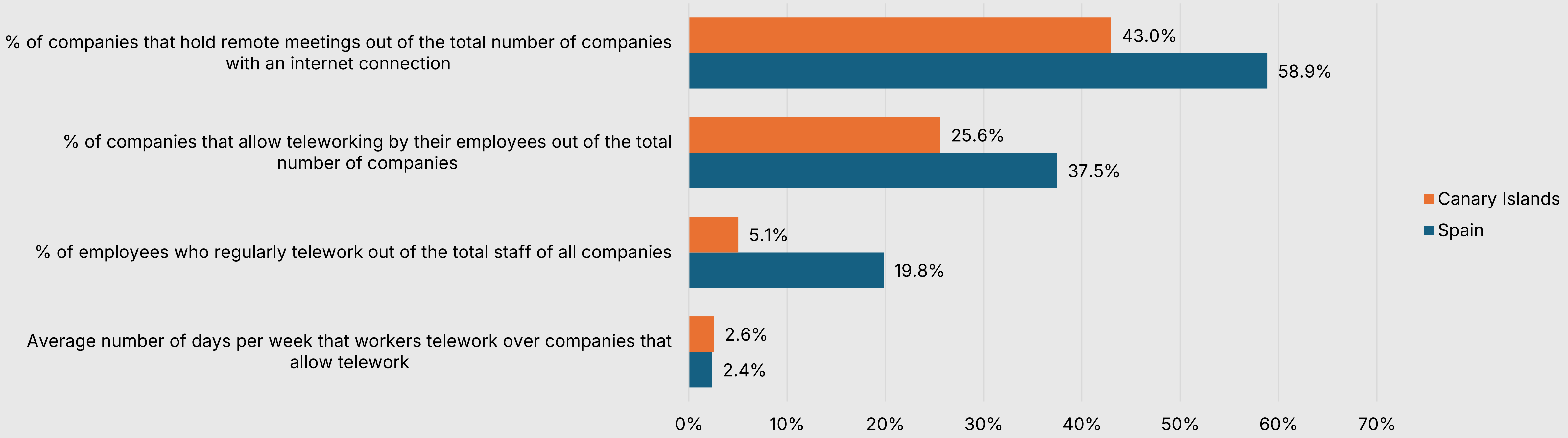


Source: Survey on the use of ICT and e-commerce in companies (INE)

Remote working in the Canary Islands shows significantly lower uptake compared to the national average, highlighting a gap in the digitalisation of the work environment. While 58.9% of companies in Spain hold remote meetings, this figure drops to 43% in the Canary Islands, suggesting a lower integration of collaborative digital tools. Similarly, only 25.6% of Canarian companies allow teleworking, compared to 37.5% nationwide.

The most notable difference lies in the percentage of employees who regularly telework, just 5.1% in the Canary Islands versus 19.8% in Spain, indicating lower acceptance of remote work among companies in the archipelago. Despite this gap, the average number of teleworking days per week among companies that allow it is similar in both regions, showing that once implemented, teleworking tends to follow similar patterns.

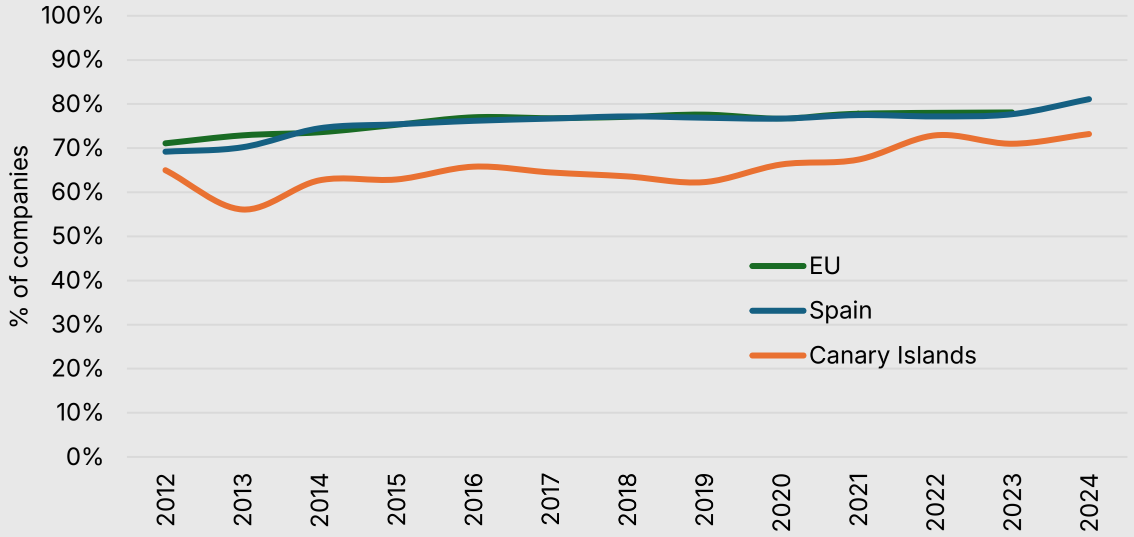
Comparison of teleworking indicators in the Canary Islands compared to Spain in 2024



Note: The values correspond to the first four months of 2024 Source: Survey on the use of ICT and e-commerce in companies (INE)

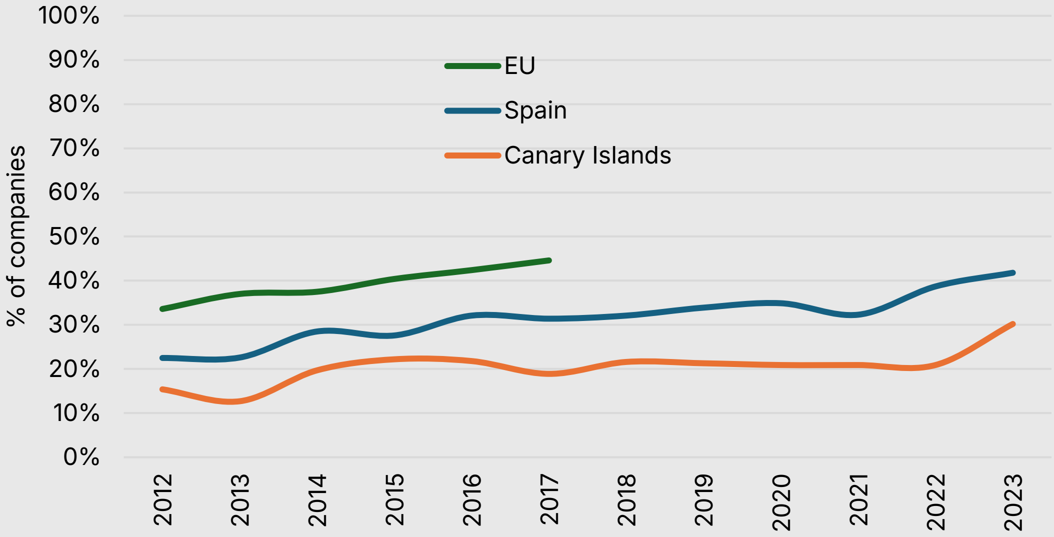
The percentage of companies with a website has followed an upward trend across all regions, reaching a high degree of homogenisation today, though with some notable differences. While both the EU and Spain have maintained stable levels of around 75-80% since 2016, the Canary Islands have shown a more irregular progression, with periods of stagnation. Despite improvements in web infrastructure in recent years, the archipelago still lags behind the national and European averages, indicating a later digital adoption within its business sector. The use of e-commerce for purchasing by businesses has increased in all regions, with Spain showing a strong upward trend, reaching nearly 40% in 2023. In the Canary Islands, adoption has been slower and more gradual up to 2022, due to international shipping barriers and associated costs. However, a significant increase in 2023 reflects a greater integration of digital commerce into the business fabric of the archipelago.

Percentage of companies with 10 or more employees with a website



Source: Canary Islands Telecommunications Observatory, based on data from the INE and Eurostat

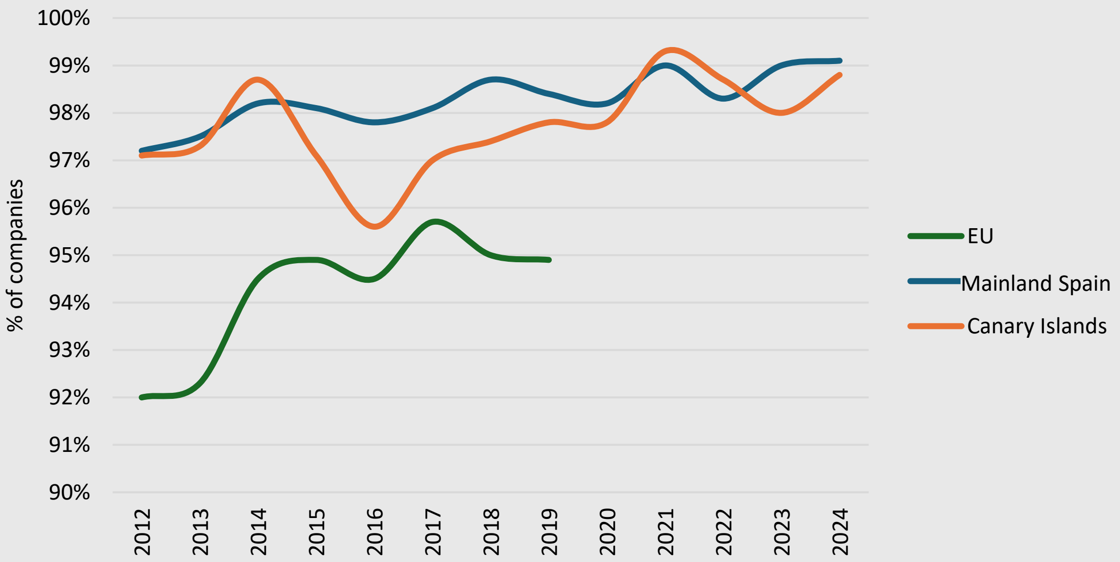
Percentage of businesses with 10 or more employees that shop through e-commerce



Source: Canary Islands Telecommunications Observatory, based on data from the INE and Eurostat

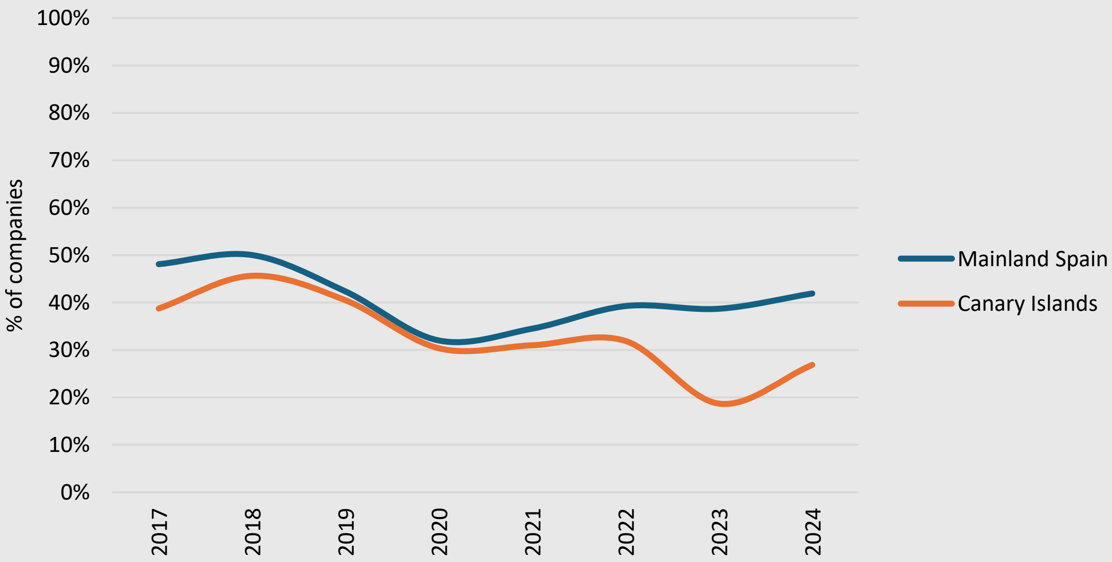
Broadband internet access is widely available in both Spain and the Canary Islands, with rates exceeding 98% since 2014. Despite minor fluctuations, both regions maintain stable coverage levels above the EU average, which has progressed more gradually and currently stands at around 96%. This reflects a high degree of digitalisation within the Spanish and Canary Island business sectors, reinforcing connectivity as a fundamental pillar for business competitiveness. In both regions, the percentage of companies employing female ICT specialists has remained relatively stable following a sharp decline in 2020, caused by the labour and contractual disruptions of the pandemic. The Canary Islands show a slightly more irregular trend than the national average, reaching their lowest point in 2023 with female representation falling below 20%, before showing a slight recovery in 2024. This suggests that while there has been progress in integrating women into the tech sector, challenges remain in ensuring the stability and consolidation of their presence, particularly in the archipelago.

Percentage of companies with 10 or more employees with a broadband internet connection



Source: Canary Islands Telecommunications Observatory, based on data from the INE and Eurostat

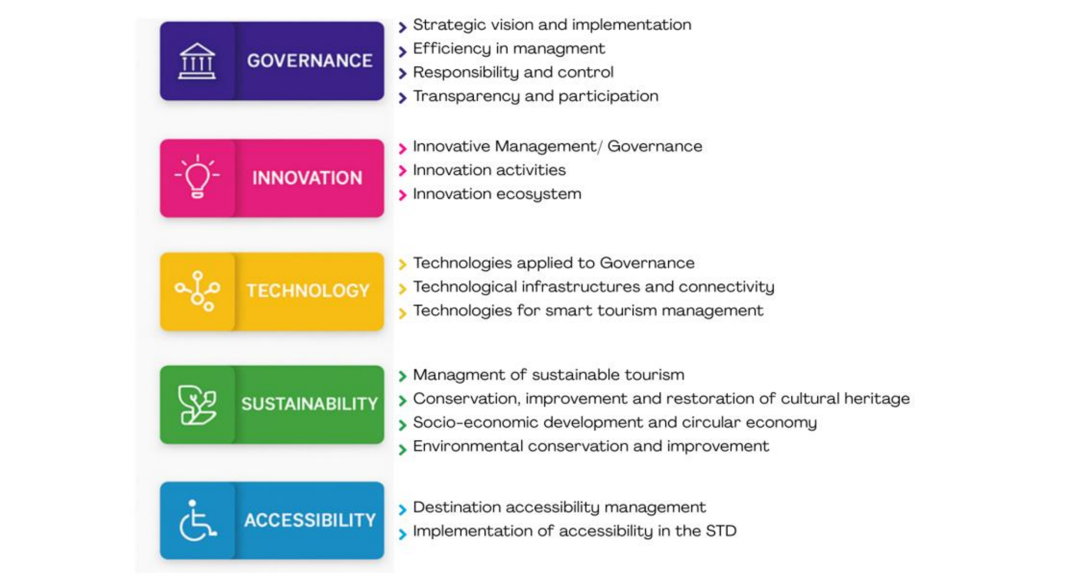
Percentage of companies with 10 or more employees with women ICT specialists



Source: Canary Islands Telecommunications Observatory, based on the Survey on the use of ICT and e-commerce in companies (INE)

The integration of twenty municipalities in the Canary Islands, along with the island of Tenerife, into the Smart Tourist Destinations (DTI) Network represents a strong commitment to the modernization and sustainability of tourism in the archipelago. This model is structured around five key pillars: governance, innovation, technology, sustainability, and accessibility, all aimed at improving tourism management and enhancing the destination's competitiveness. This prominent presence in the network reflects a growing commitment to digital transformation, efficient governance, and the enhancement of the tourist experience. Investment in technological infrastructure, universal accessibility, and heritage conservation are essential components to ensure balanced development aligned with the needs of both residents and visitors. Achieving these objectives requires decisive efforts and ongoing collaboration among public administrations, the private sector, and civil society. The implementation of innovative and sustainable solutions will enable better distribution of tourist flows, reduce pressure on saturated areas, and foster more equitable territorial development. In this context, sustainability should not merely be one pillar of the DTI model, but the cross-cutting axis that ensures tourism in the Canary Islands continues to be a long-term driver of development.

Axes of the smart tourist destination model



Local administrations in the DTI Network

Santiago del Teide
Guía de Isora
Adeje
Arona
Puerto de la Cruz
S/C de Tenerife
Island of Tenerife
Mogán
Tejeda
Las Palmas de G.C
Pájara
Tuineje
Antigua
Puerto del Rosario
La Oliva
Yaiza
Tinajo
Tías
San Bartolomé
Arrecife
Haría

Source: Smart Destinations Network, SEGITTUR

Digitalisation, knowledge and smart tourism

Indicator	Description	Availability	Fountain	Remarks
Infrastructure and connectivity	Companies or Organizations that have an Internet connection, with broadband and mobile 3G, 4G or higher.	Partially available	Survey on the use of ICT and e-commerce in companies (INE)	Specific data on tourism companies/organizations are needed
Internet presence and use	Companies or Organizations that have a website, use social networks, advertise on the Internet and/or interact with the Public Administration through networks.	Partially available	Survey on the use of ICT and e-commerce in companies (INE)	Specific data on tourism companies/organizations are needed
Key technologies and digital talent	Companies or Organizations that use cloud services, big data analysis, 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 ICT and e-commerce in companies (INE)	Specific data on tourism companies/organizations are needed
Number of companies with a digitalization strategy	Number of companies	Unavailable		It could try to be included in tourist accommodation surveys
Use of artificial intelligence and big data in tourism management	Companies that are using these tools to increase their competitiveness or improve the tourist experience	Unavailable	Specific indicators on the tourism sector are needed	
Degree of tourist satisfaction with the digital offer and smart services	Information via survey on tourist satisfaction in this area	Unavailable		It could seek to be included in the Tourism Expenditure Survey
Use of neuroscience in tourism	Number of companies and applications	Unavailable		

4.7

Energy management

Introduction

Energy management in the Canary Islands encompasses three fundamental and closely interrelated aspects: production, distribution, and consumption of energy, with storage set to play a key role in the region's energy decarbonisation.

In the tourism sector, the services with the highest energy demand include the transport of people and goods, thermal comfort in facilities, integrated water management, and the production, transport, and handling of food and waste. All these services rely heavily on the sustainable and efficient management of energy resources.

Energy production in the islands faces unique challenges due to their geographic isolation, making the integration of renewable energy sources, consumption efficiency, and decarbonisation solutions in the tourism sector even more critical. In addition, energy distribution must be efficient to ensure a constant and reliable supply, particularly in such a dynamic sector as tourism. This chapter analyses the key factors to understand energy management, with a focus on demand management, the current and future challenges of energy supply in the islands, and ongoing initiatives and projects aimed at improving energy sustainability. It also explores the strategies required to address the challenges posed by the growth of tourism in the Canary Islands.

From an energy perspective, the Canary Islands currently show a high level of vulnerability due to their dependence on imported fossil fuels, which must be supplied to each island individually. This is largely due to the lack of interconnection across the territory and an insufficient share of energy consumption from renewable sources. In this context of weak sustainability, tourism may represent both a threat and an opportunity for ecological transition. Investments in renewable energy, mainly wind and solar photovoltaic, have marked a significant step forward, although they remain insufficient to meet EU targets and national and international commitments undertaken.

Maritime and air transport account for a substantial share of fuel consumption, particularly maritime freight, which remains essential for meeting the needs of both residents and tourists. Tourists consume between three and five times more energy and water per capita than residents. Overall, renewable energy produced in the Canary Islands represents, on average, less than 20% of total consumption, despite the abundant availability of sun and wind. This is largely due to system operation constraints; therefore, the implementation of storage capacity would allow renewable energy to become dispatchable and increase its share in final consumption.

This chapter addresses the main challenges facing energy management in the Canary Islands in the transition towards clean and sustainable energy. Achieving this sustainability requires continued collaboration between public authorities, strategic investment in infrastructure, and a commitment to research and innovation, an effort that must be led by the autonomous community itself, responding to its specific needs and characteristics.

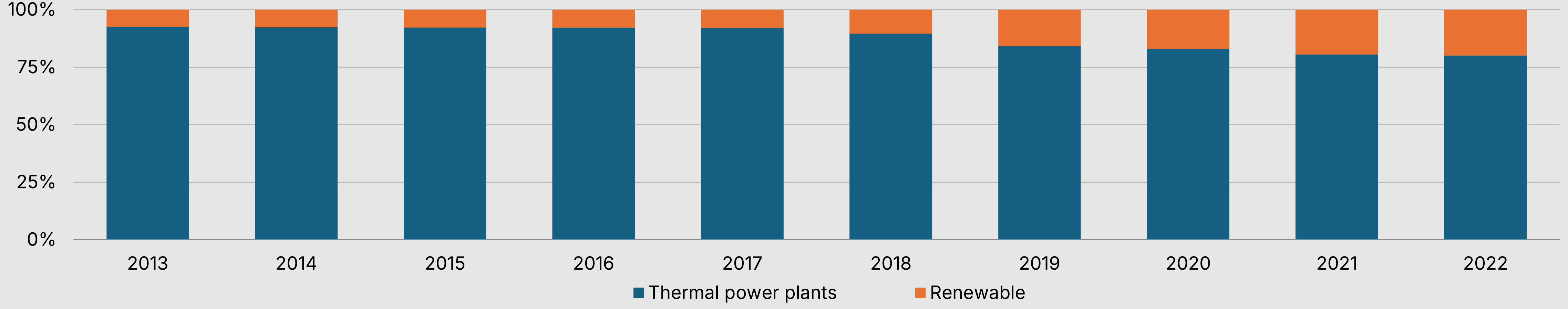
Overview

Electricity production in the Canary Islands has undergone modernisation over the years, although most electricity is still generated by thermal power plants fuelled by fossil fuels.

While these plants are efficient in terms of output, they contribute significantly to greenhouse gas emissions and rely on imported fuels, which increases the islands' energy vulnerability and undermines their energy autonomy. However, in recent decades, there has been a notable rise in the contribution of renewable energy sources such as wind and solar power. This shift reflects the need to reduce fossil fuel dependence and aligns with energy policies aimed at mitigating the impacts of climate change. Despite this progress, the continued heavy reliance on fossil fuels—largely due to operational constraints in isolated electrical systems—remains a key limiting factor for growth and energy self-sufficiency, particularly in the tourism sector. As one of the main economic drivers in the Canary Islands, tourism requires a reliable and sustainable energy supply to maintain its competitiveness and appeal.

Although considerable efforts have been made over the past decade to increase the share of renewables in the electricity generation mix, these sources still account for, on average, less than 20% of demand coverage. While this percentage is notable, it remains insufficient to ensure the islands' energy self-sufficiency.

Evolution of electricity demand coverage in the Canary Islands between 2013 and 2022



Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands

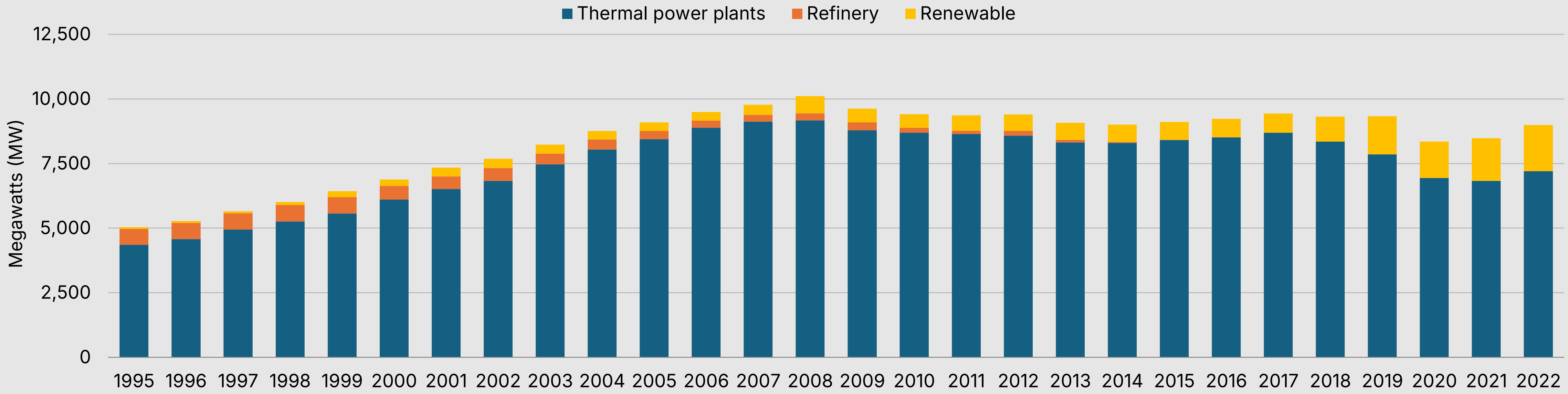
The evolution of the energy mix in the Canary Islands over the past 27 years shows a clear increase in overall consumption, which has nearly doubled, alongside a significant and sustained rise in the share of renewable energy sources compared to refineries and conventional thermal power plants.

Between 2007 and 2009, energy consumption peaked at 10 GW, a level that has not been exceeded to date. Since then, average consumption has remained below that threshold, forming a consumption plateau. During this period, the share of thermal generation in the energy mix has dropped by nearly 30%, while the share of renewables has steadily increased.

In a sector marked by growing demand, where climate change poses a real threat through increasingly frequent and intense extreme weather events, ensuring a reliable energy source on each island is a major challenge, one in which energy storage will play a crucial role within the electricity systems.

Guaranteeing a stable and sustainable energy supply is essential to address the current and future challenges facing tourism in the Canary Islands. Moreover, the integration of renewable energy will not only contribute to environmental sustainability but may also provide competitive advantages for the tourism sector by attracting visitors who seek more sustainable services.

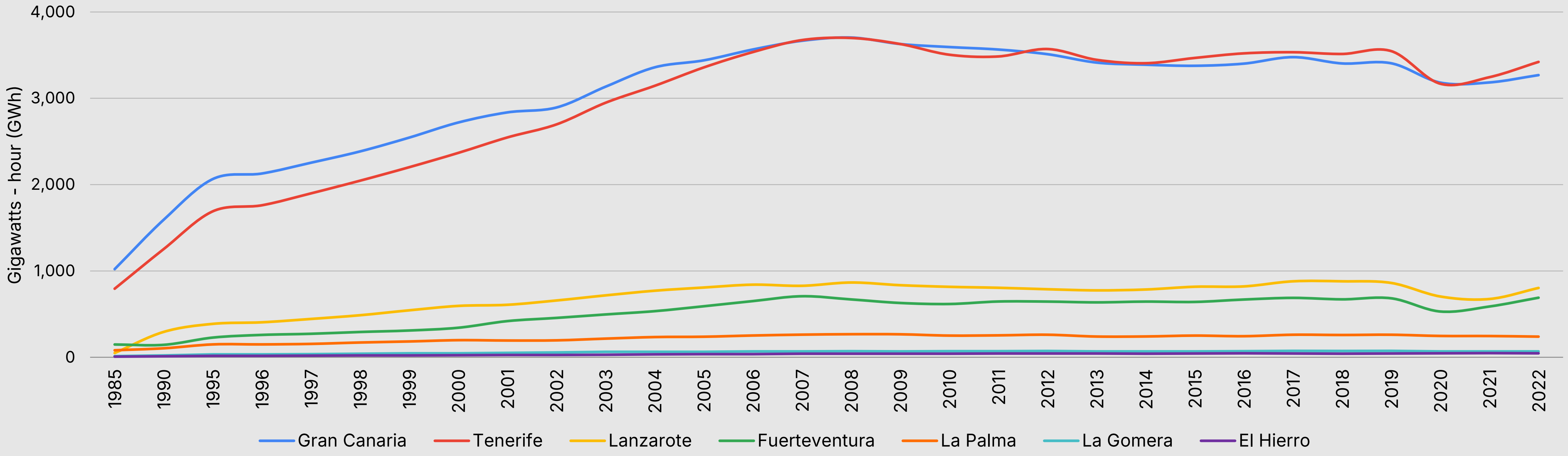
Evolution of the share by energy source between 1995 and 2022



Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands

Annual electricity generation (in GWh) in the Canary Islands has shown uneven growth across the islands. Gran Canaria and Tenerife have led with sustained increases, particularly pronounced since the year 2000. Lanzarote and Fuerteventura have experienced moderate expansion, which accelerated from 2010 onwards. Meanwhile, the smaller islands, La Palma, La Gomera, and El Hierro, have followed a more gradual upward trend, with El Hierro standing out for its recent growth linked to renewable energy projects such as Gorona del Viento. This overall growth, driven by factors such as population demand, tourism, and sustainable innovation, clarifies the initial interpretation by specifying that the data reflect energy production rather than consumption alone.

Evolution of annual electricity supplied to the grid in the Canary Islands by island

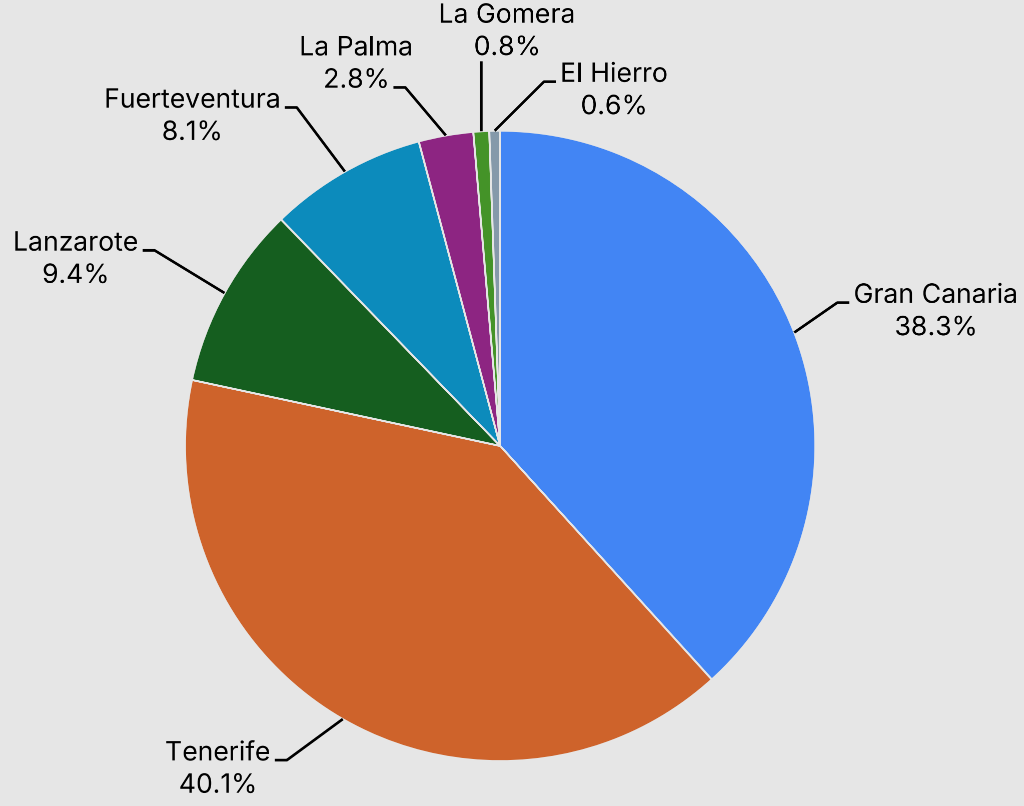


Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands

A higher volume of tourists leads to a greater share of electricity dispatched across the islands, which is particularly evident. However, the installed capacity within each electrical subsystem, currently not interconnected, poses a challenge for the tourism sector, which requires high levels of energy consumption, often seasonally concentrated during periods of peak tourist arrivals and variable weather conditions. In contrast, resident consumption remains relatively stable throughout the year.

At a glance, Tenerife emerges as the island contributing the most to the Canary Islands' total electricity supplied to the grid, accounting for approximately 40% of the overall share. It is closely followed by Gran Canaria with around 38%, indicating that these two islands are the main producers of electrical energy in the archipelago. The remaining islands, such as Fuerteventura, Lanzarote, La Palma, La Gomera, and El Hierro, contribute to a lesser extent, each with a specific share.

Distribution of the total electricity supplied to the grid in the Canary Islands

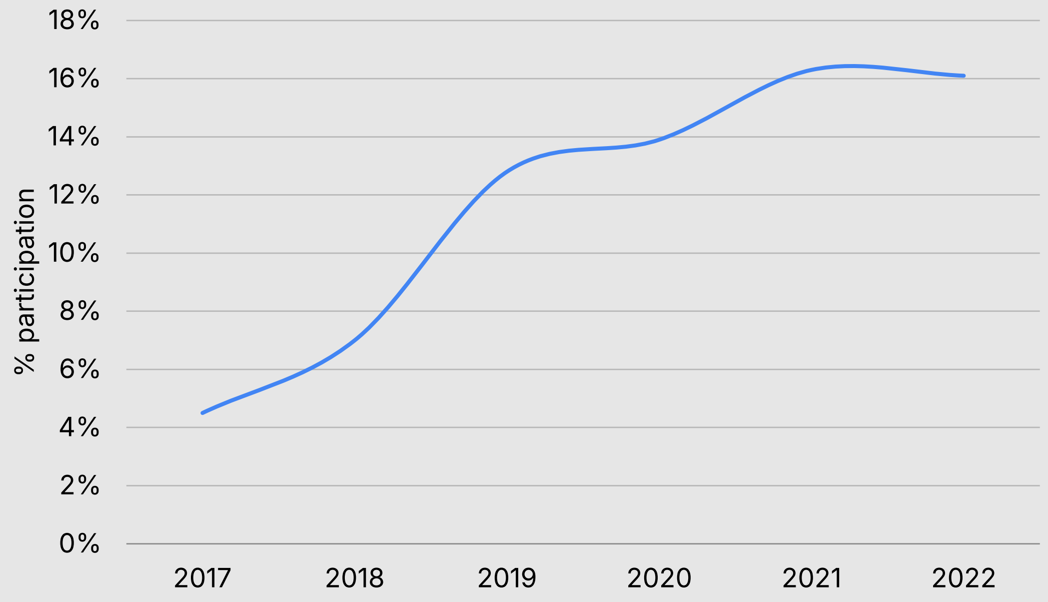


Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands

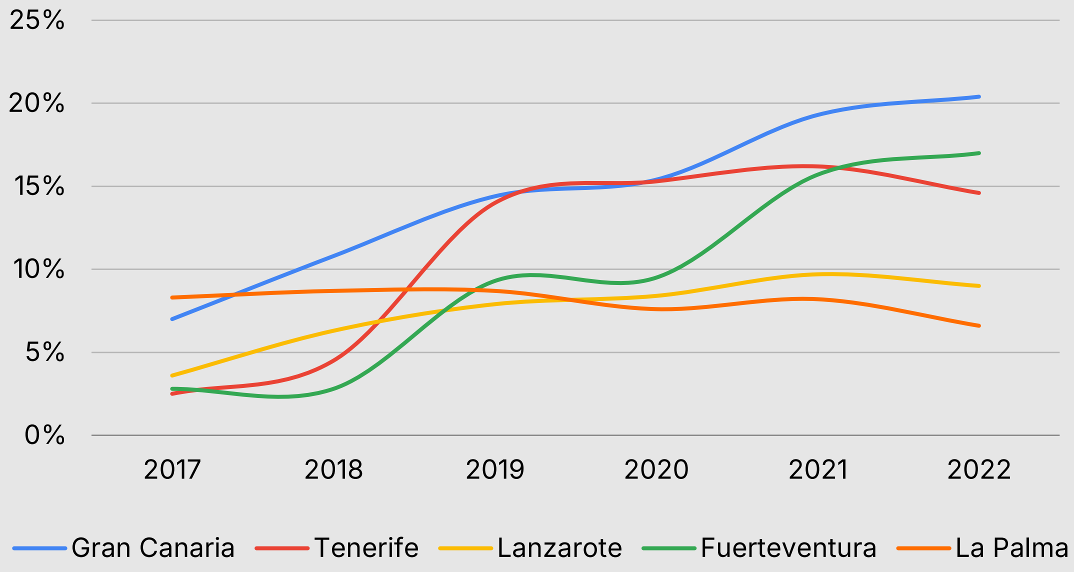
Wind energy

Annual electricity generation (in GWh) in the Canary Islands has experienced uneven growth across the islands. Gran Canaria and Tenerife led with sustained increases, particularly pronounced since the year 2000. Lanzarote and Fuerteventura showed moderate expansion that accelerated from 2010 onwards. The smaller islands, La Palma, La Gomera, and El Hierro, followed a more gradual upward trend, with El Hierro standing out for its recent growth linked to renewable energy projects such as Gorona del Viento. This overall growth, driven by factors such as population demand, tourism, and sustainable innovation, corrects the initial interpretation by clarifying that the data reflect energy production, not just consumption.

Evolution of the share of wind energy in the Canary Islands between 2017 and 2022



Evolution of the share of wind energy by Canary Island between 2017 and 2022

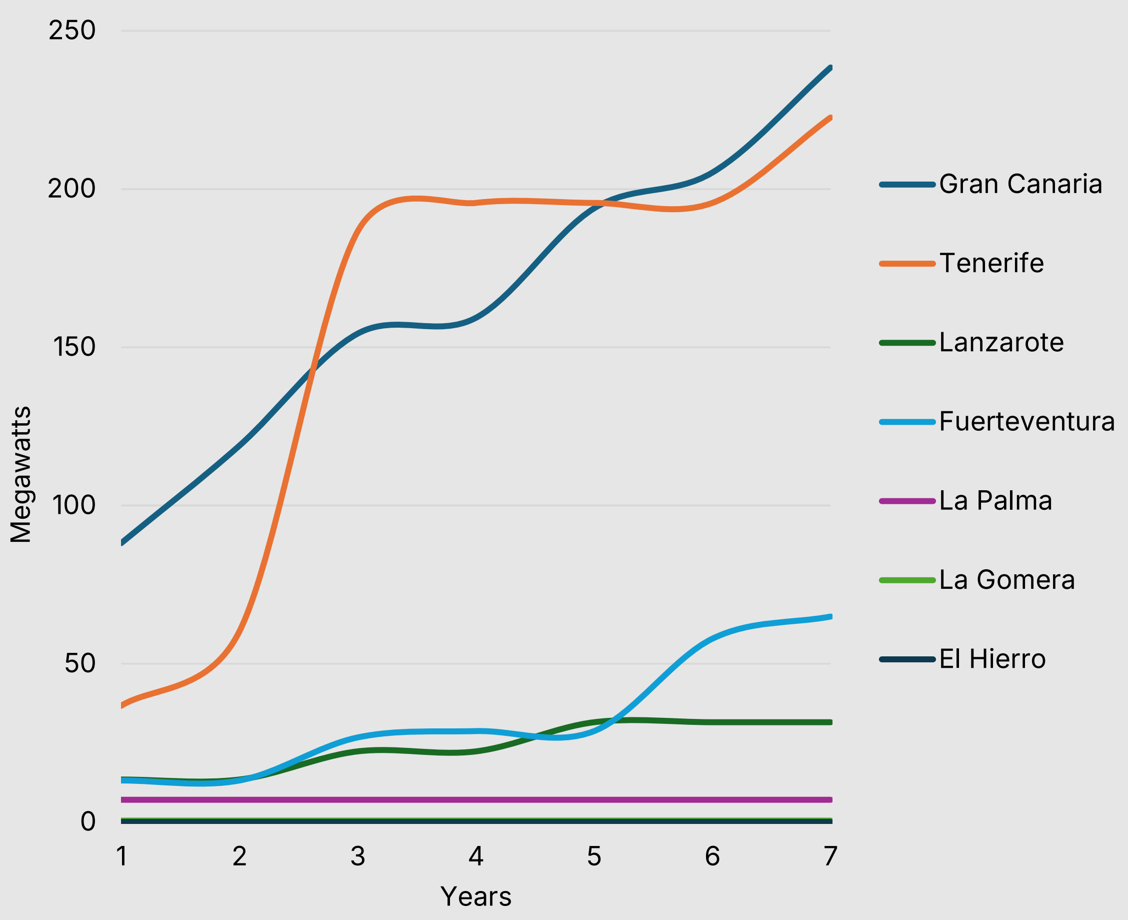


Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands (both graphs)

The expansion of wind energy across the Canary Islands has progressed at different rates. Islands such as Gran Canaria and Tenerife have seen the most significant increases in installed wind power capacity, positioning them as leaders in wind energy generation within the archipelago.

This disparity in wind energy development can be attributed to structural factors. Gran Canaria and Tenerife, with high tourism and population demand, have prioritised investment in robust infrastructure and large-scale wind farms, taking advantage of suitable land and more agile regulatory frameworks. In contrast, the western islands face geographical barriers such as rugged terrain, outdated electrical grids, and a focus on alternative models like hydro-wind energy (e.g., Gorona del Viento). Additionally, the lack of incentives tailored to their specific contexts perpetuates a centralised transition model that requires more localised strategies to balance equity and sustainability.

Evolution of wind energy power between 2016 and 2022

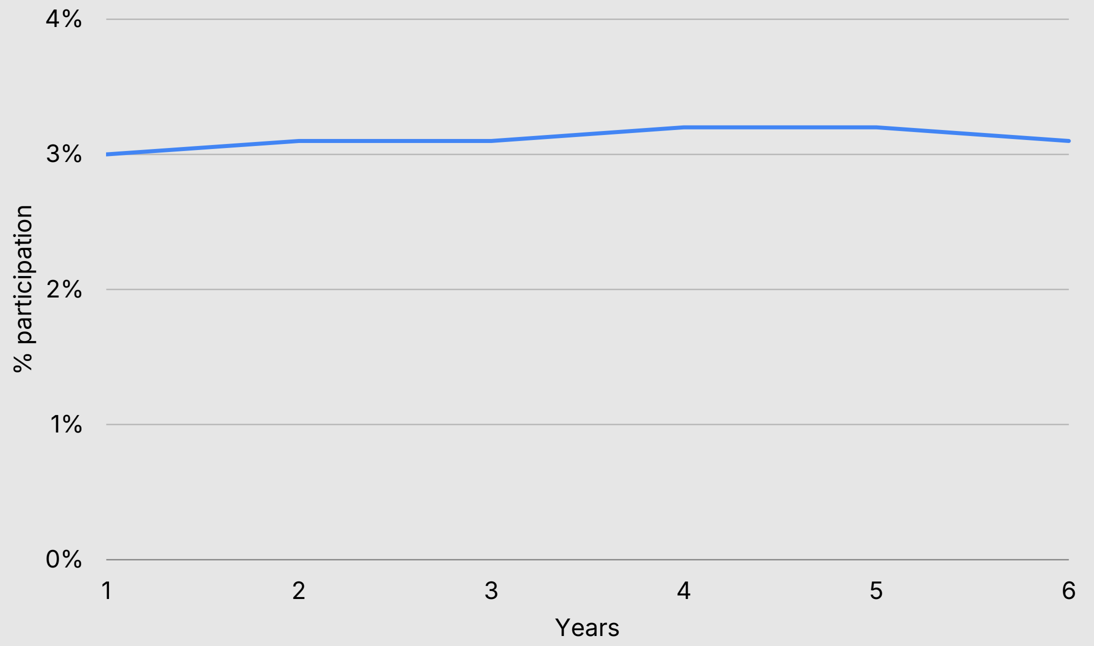


Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands

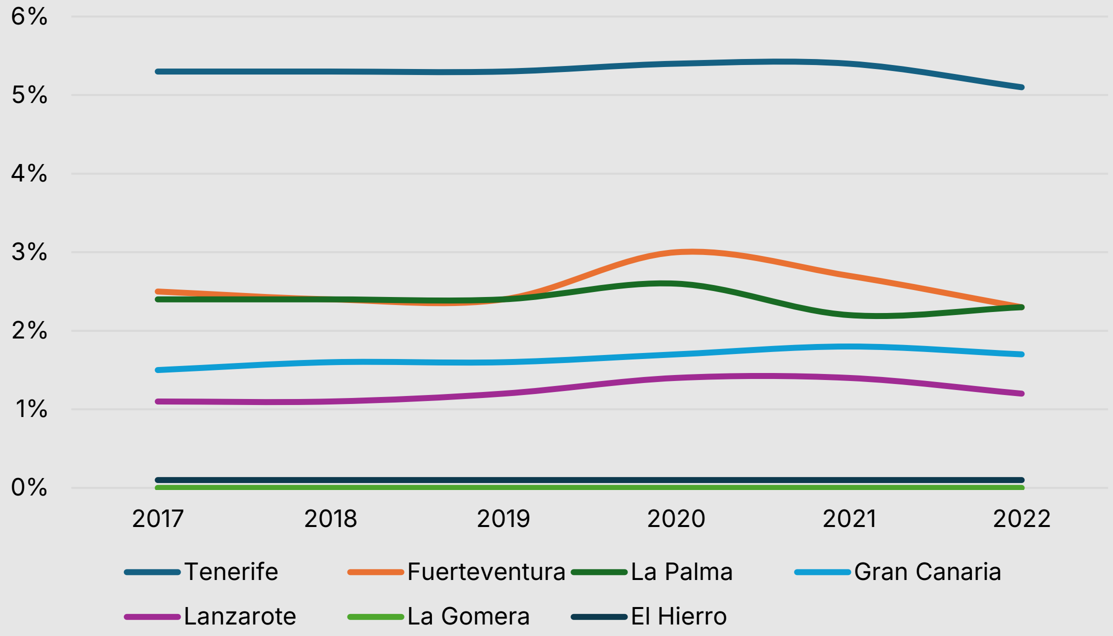
Photovoltaic energy

The share of photovoltaic energy in electricity generation in the Canary Islands has remained stable, slightly above 3% of the total, with notable differences between islands. Tenerife maintains a penetration rate above 5%, while in other islands the share is significantly lower.

Evolution of the share of photovoltaic energy in the Canary Islands between 2017 and 2022



Evolution of the share of photovoltaic energy by Canary Island between 2017 and 2022

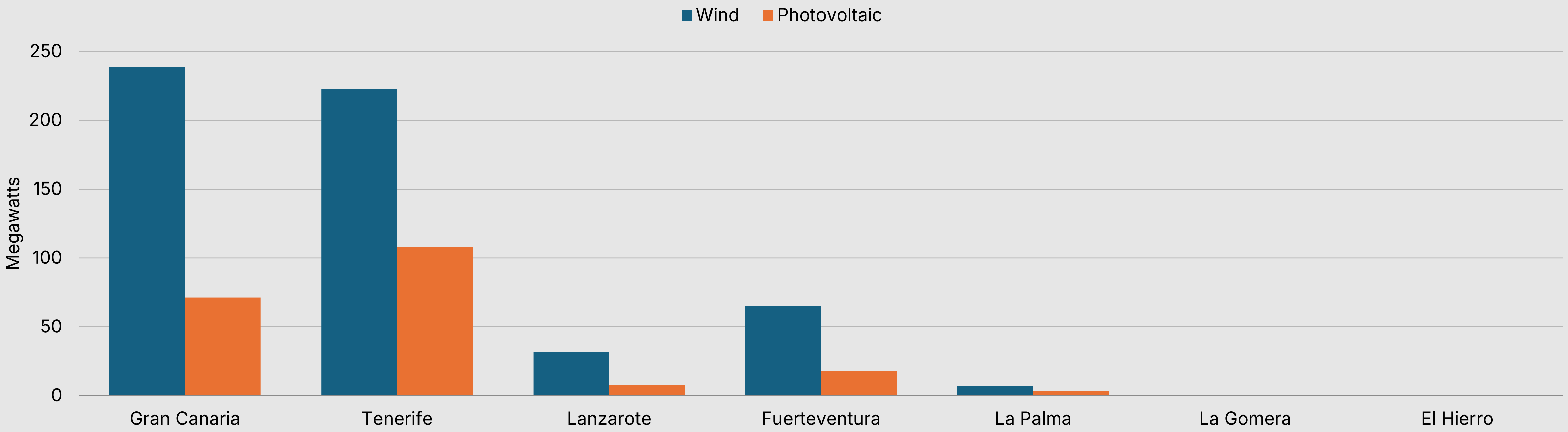


Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands (both graphs)

Wind - photovoltaic comparison

Electricity generation from wind and photovoltaic sources in the Canary Islands shows a clear dominance of wind power, although neither source exceeds 250 MW of installed capacity. This is complemented by photovoltaic generation, which holds high potential across all islands. At the national level, the Canary Islands remain below the average for generation from both renewable sources. While both energy sources vary across the islands, wind power clearly stands out as the primary source of renewable electricity in the archipelago.

Comparison between the electricity generation park derived from wind and photovoltaic sources

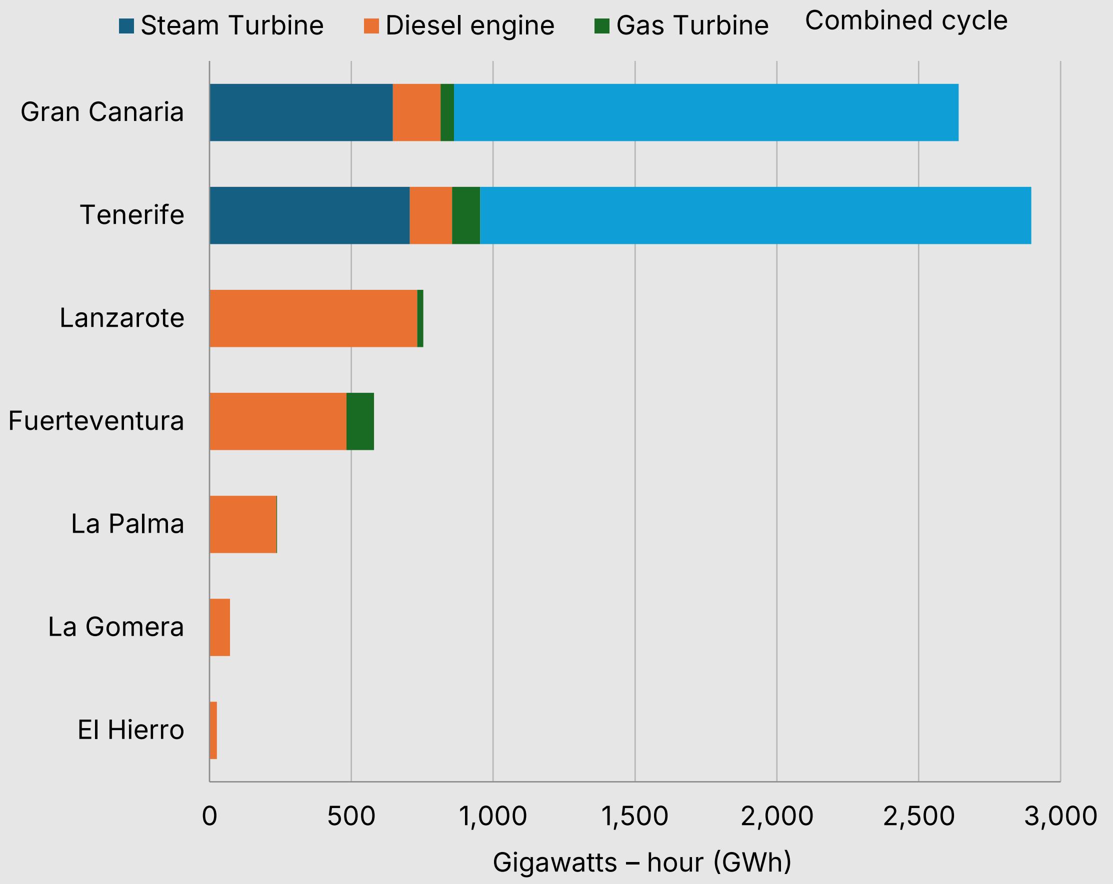


Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands

Electricity generation from fossil fuels

Gross energy generation from petroleum derivatives in the Canary Islands reveals a clear technological and geographical divide: Gran Canaria and Tenerife led with combined-cycle and steam turbine generation (2,000–3,000 GWh), reflecting advanced infrastructure and high demand. Lanzarote and Fuerteventura relied predominantly on diesel engines (1,000–1,500 GWh), while the western islands recorded the lowest output (<500 GWh), also diesel-based, highlighting disparities in access to cleaner technologies.

Gross energy share of petroleum derivatives



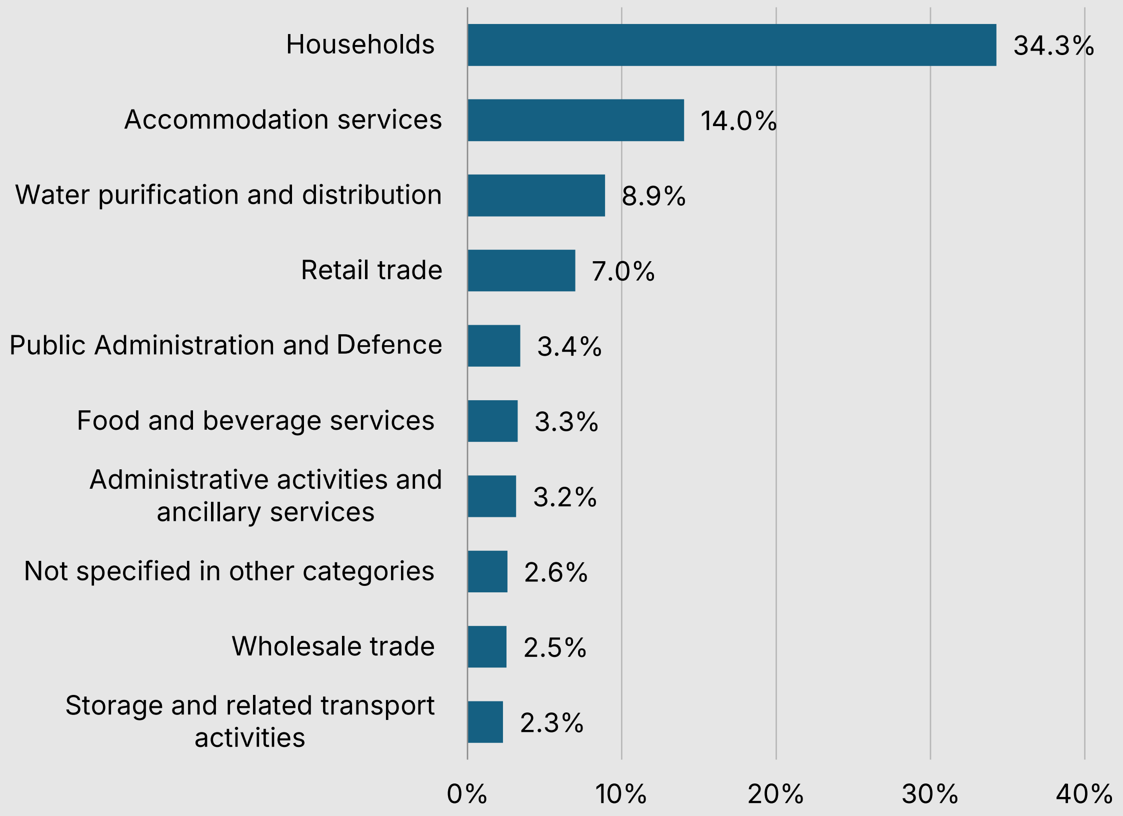
Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands

Electricity demand

The chart on electricity demand in the Canary Islands highlights the significant weight of the tourism sector, particularly accommodation, in the islands' energy consumption. Accommodation services, including hotels and tourist apartments, account for 14% of total electricity demand, making them the second-largest consumer after households (34.3%).

This figure underscores the importance of tourism as an economic driver in the Canary Islands and its direct impact on energy resources. The sector's high energy demand reinforces the need to advance towards more sustainable practices, such as implementing energy efficiency systems and increasing the use of renewable sources in tourism facilities.

Percentage of electricity demand in the main sectors

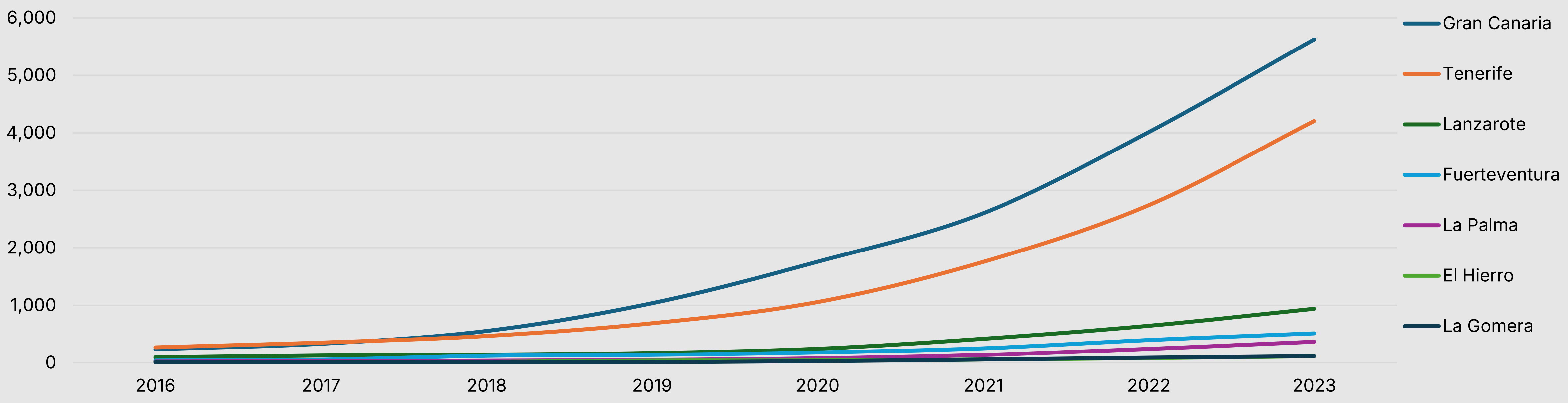


Source: Canary Islands Energy Yearbook (2022) – Ministry of Ecological Transition and Energy of the Government of the Canary Islands

Electric vehicles

The number of electric vehicles in the Canary Islands has seen significant growth, particularly in the capital islands. However, their share remains marginal compared to combustion engine vehicles. The share is even lower in freight and passenger transport. Key strategies for sustainable mobility include improving the efficiency and electrification of public transport, promoting low-emission zones, and encouraging active mobility, among others. The graph shows a steady increase in the number of electric vehicles across the Canary Islands from 2016 to 2023, although it is important to note that this growth started from a very low baseline. All islands have experienced a notable rise in electric vehicles, albeit at varying rates.

Electric vehicles in the Canary Islands



Source: Vehicle Fleet Statistics (ISTAC)

Energy management

Indicator	Description	Availability	Source	Remarks
Share of renewable energy in primary energy use Percentage of electricity production from renewable sources	Tonnes of oil equivalent to the renewable energy sector. Total tonnes of oil equivalent to the total of primary energy.	Available	Energy Yearbook of the Canary Islands. Ministry of Ecological Transition, Fight against Climate Change and Territorial Planning, Government of the Canary Islands	
Importance of electric vehicles	Percentage of electric vehicles registered and in circulation, including rental vehicles, by island.	Partially available	Vehicle Fleet Statistics (ISTAC)	There is no information about rental vehicles.
Share of energy consumption by economic sector	Tonnes of oil equivalent demand from the economic sector. Total tonnes of energy demand for oil equivalent.	Partially available	Energy Yearbook of the Canary Islands. 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 from the economic sector and value added from the economic sector.	Partially available	Energy Yearbook of the Canary Islands. 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

Introduction

Water management in the Canary Islands faces structural challenges stemming from the scarcity of natural water resources, increasing demographic and economic pressure, and the effects of climate change on both the availability and quality of water.

The archipelago's water supply relies on seawater desalination and the exploitation of groundwater and surface water sources, managed under a mixed system of public and private ownership. However, the distribution of these sources varies significantly between islands. In Lanzarote and Fuerteventura, desalination provides over 90% of the supply, whereas the western islands mainly depend on groundwater. Gran Canaria, in particular, supplements its supply through the strategic use of surface resources (15%).

Water cycle governance in the Canary Islands faces two critical challenges. Firstly, the regulatory and management structure has led to the overexploitation of aquifers, jeopardising their long-term sustainability. Secondly, significant shortcomings persist in wastewater management, exacerbating environmental impact and limiting the development of a circular water economy.

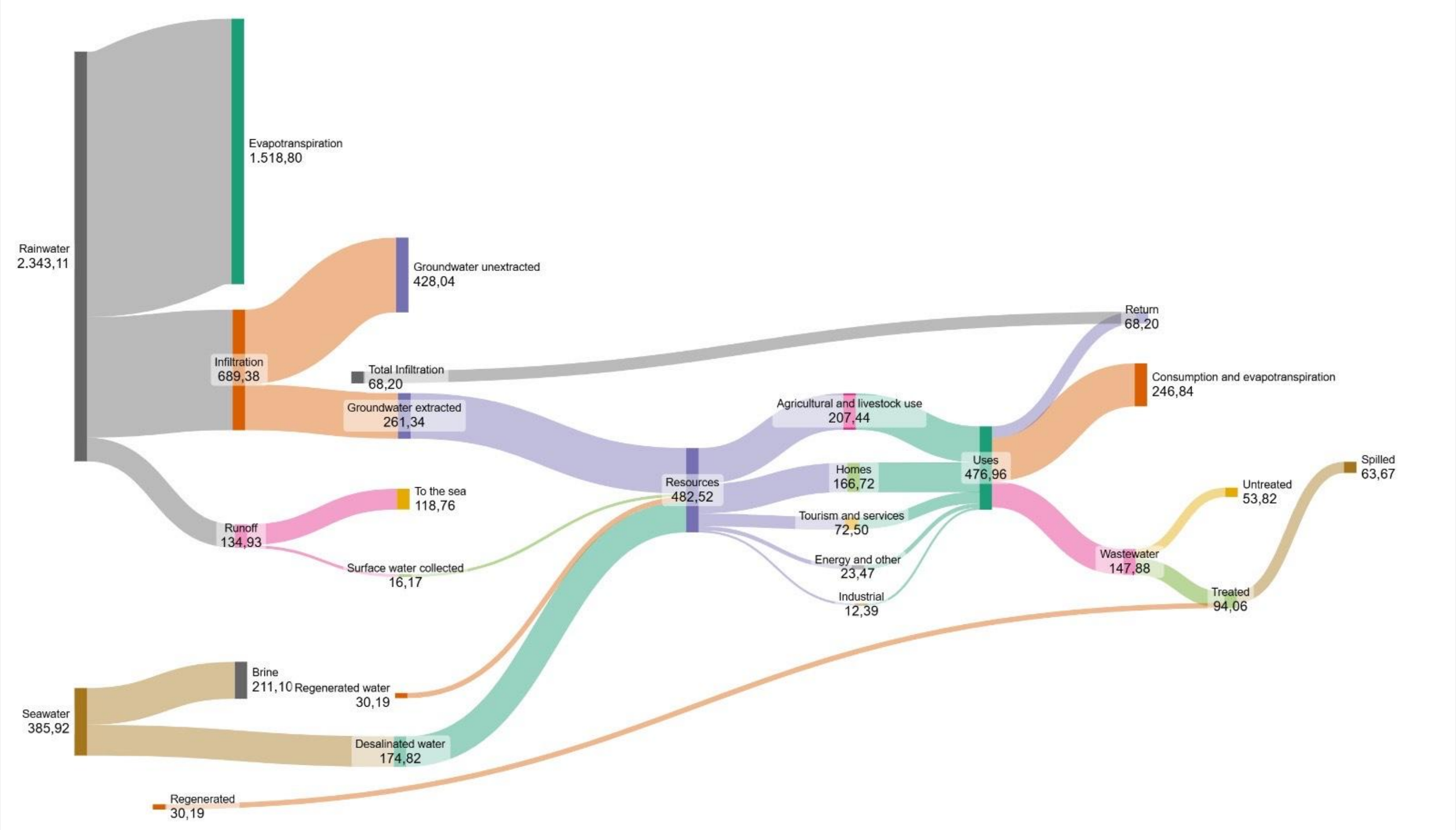
Overcoming these challenges requires a data-driven approach, with up-to-date and accurate information to optimise water efficiency policies across sectors and improve the planning of strategic investments to secure future supply.

Strengthening the regulatory framework, improving monitoring through digitalisation, and advancing technological innovation in desalination and water reuse will be essential to enhancing the archipelago's water resilience.

The hydrological regime in the Canary Islands is characterised by irregular rainfall and high evapotranspiration, reducing groundwater availability. Infiltration does not offset extraction, lowering the water table and threatening aquifers. To mitigate this deficit, desalination, dam utilisation, and reclaimed water use are essential, although their implementation faces technical and economic barriers. Achieving water sustainability requires optimised resource management, a reduction in the carbon footprint, and financial viability, not as an option, but as a strategic imperative for territorial resilience.

Integral water cycle

The integral water cycle in the Canary Islands (hm³/year)



Note: The sectoral water uses have been obtained through water endowments estimated in the planning. Source: Prepared by the authors based on 3rd Cycle Hydrological Plans (2021-2027)

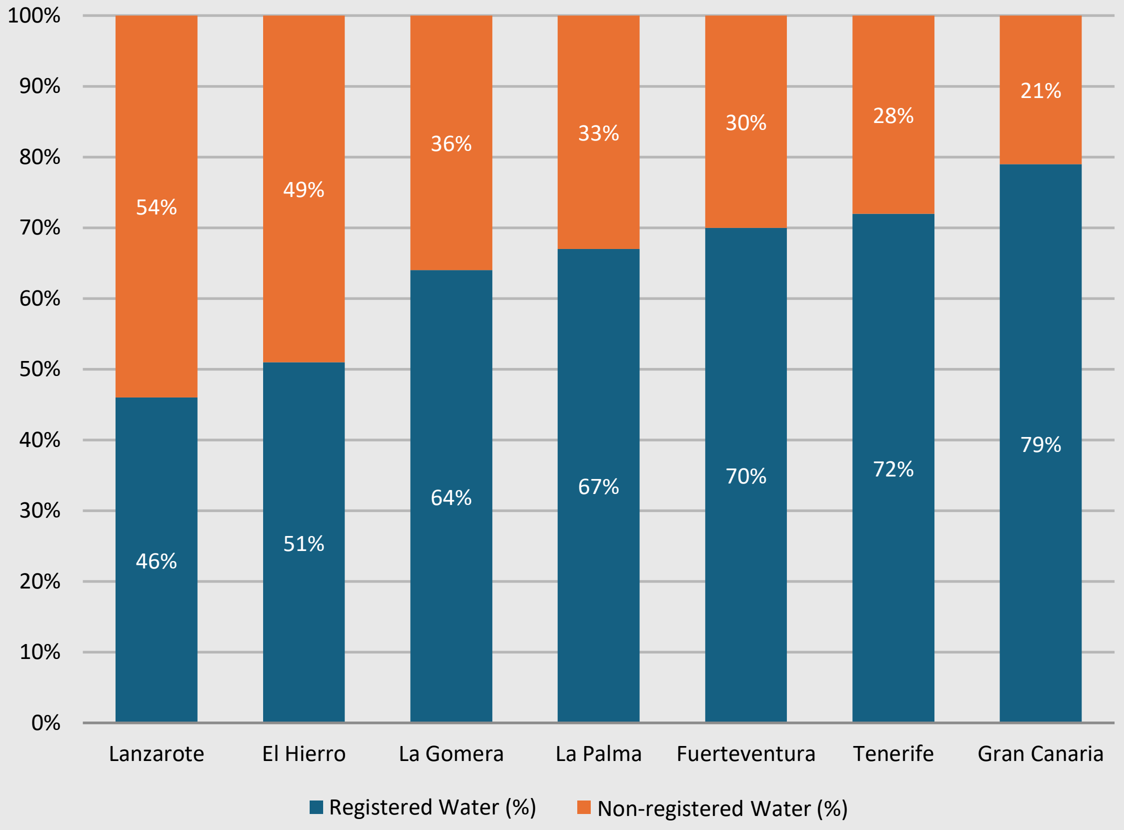
Network efficiency

El Hierro and Lanzarote show the lowest levels of water efficiency, with a high percentage of unaccounted-for water due to network losses, metering errors, and unauthorised consumption. In contrast, Tenerife and Gran Canaria stand out for their more efficient and optimised infrastructure management.

These efficiency disparities are linked to the age and extent of distribution networks, as well as to the availability of financial and technical resources for their maintenance and modernisation. El Hierro and some smaller municipalities face higher per-unit maintenance costs due to low user density; Lanzarote is notable for its high supply prices and a governance framework that currently hinders optimisation of water service provision.

In the larger islands, higher hydraulic efficiency is the result of more resilient and better-maintained systems, supported by economies of scale that enable more coordinated management by their Island Councils.

Efficiency in urban water supply networks in the Canary Islands (% of total water supplied) in 2021



Source: Prepared by the authors based on 3rd Cycle Hydrological Plans (2021-2027)

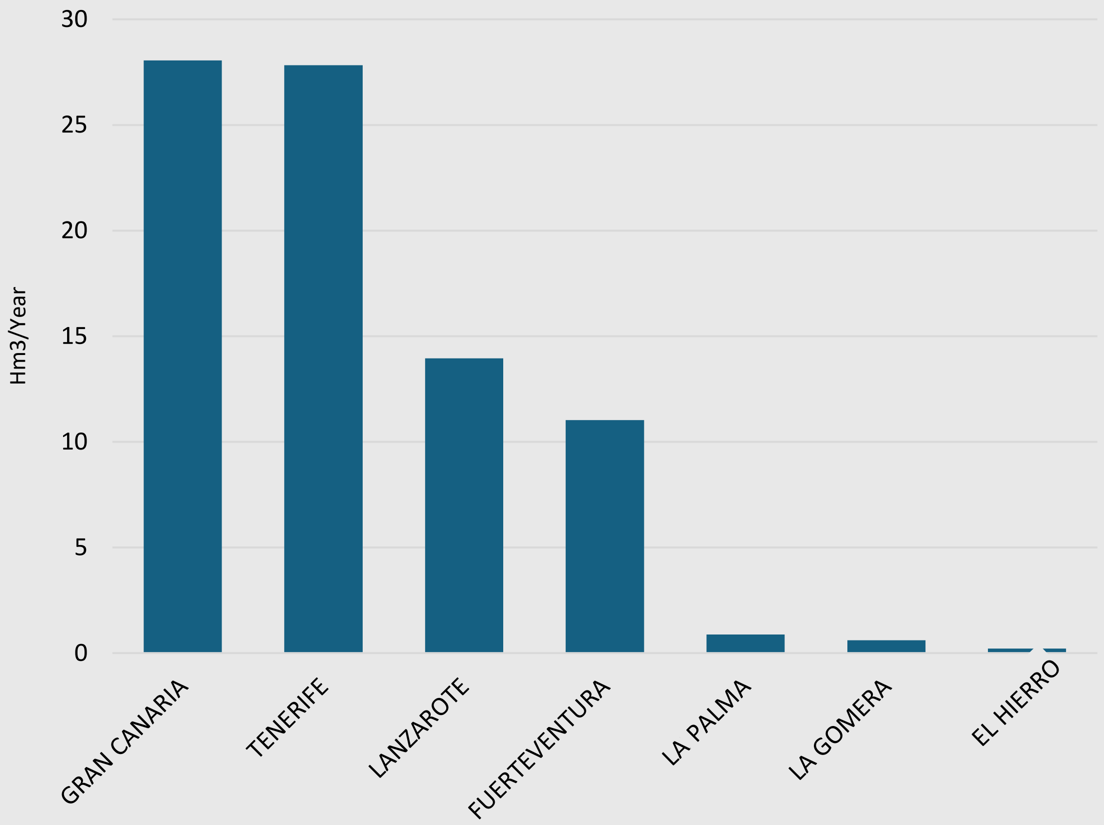
Water consumption in accommodation

Since data on water consumption in the tourism sector in the Canary Islands is aggregated under the domestic and commercial category, water allocation figures from each island's Hydrological Plan have been used to estimate consumption per overnight stay and per bedspace in the accommodation sector. However, this methodology excludes water use in complementary activities and along the supply chain, limiting the assessment of the sector's overall water footprint.

The islands with the highest tourist influx, such as Tenerife and Gran Canaria, report the highest absolute water consumption, linked to their large-scale tourism infrastructure, which includes high-capacity establishments and water-intensive services such as swimming pools, spas, and golf courses. In contrast, the green islands of La Palma, La Gomera, and El Hierro show the lowest absolute consumption, although these differences must be interpreted in relation to the scale of their infrastructure and reliance on other types of accommodation.

For a more accurate assessment of tourism's water impact, disaggregated data is needed, along with the inclusion of consumption from holiday rentals and a comprehensive water footprint analysis that covers the entire sector's supply chain.

Estimated water consumption in the accommodation sector (Hm^3/year) in 2023

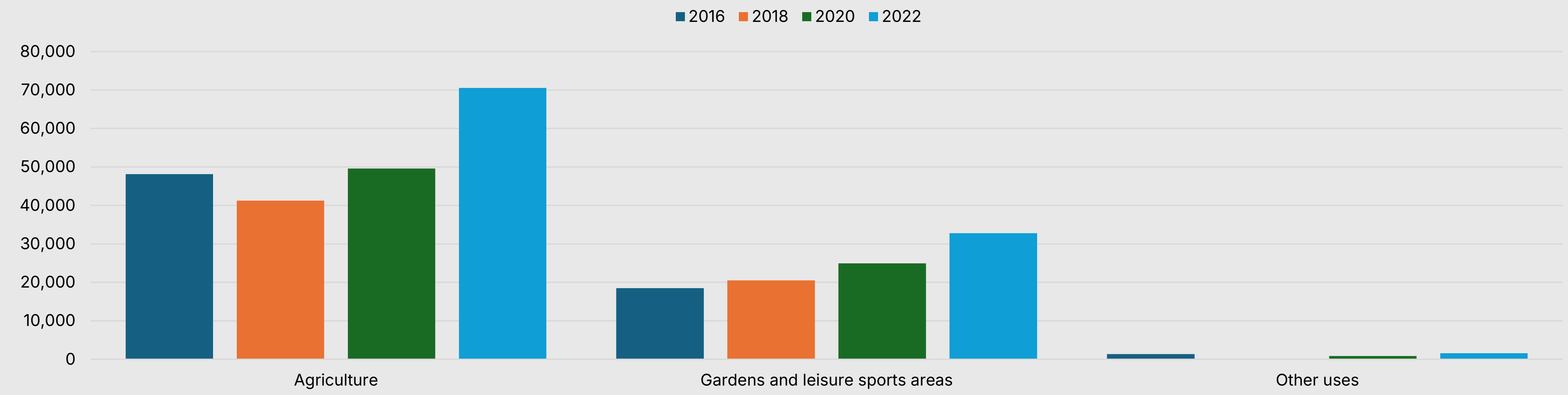


Source: Prepared by the authors based on 3rd Cycle Hydrological Plans (2021-2027)

Water reuse

The reuse of reclaimed water in the Canary Islands has grown significantly between 2016 and 2022, with a marked increase in its application within the agricultural sector. This growth is the result of new investments in infrastructure, particularly in Tenerife, which have expanded the capacity for treatment and distribution of reclaimed water. According to data from the Government of the Canary Islands, approximately 33 hm^3 are currently reused each year—just 6% of total consumption, with a target of reaching 80 hm^3. Royal Decree 1085/2024, which transposes several EU Directives aimed at reducing risks and ensuring quality standards for the use of reclaimed water, will facilitate its agricultural use in the Canary Islands, especially for export-oriented crops.

Evolution (2016-2022) of the volume of water reused by type of use (thousand m^3)



Source: Water Statistics Collection (ISTAC)

Wastewater management

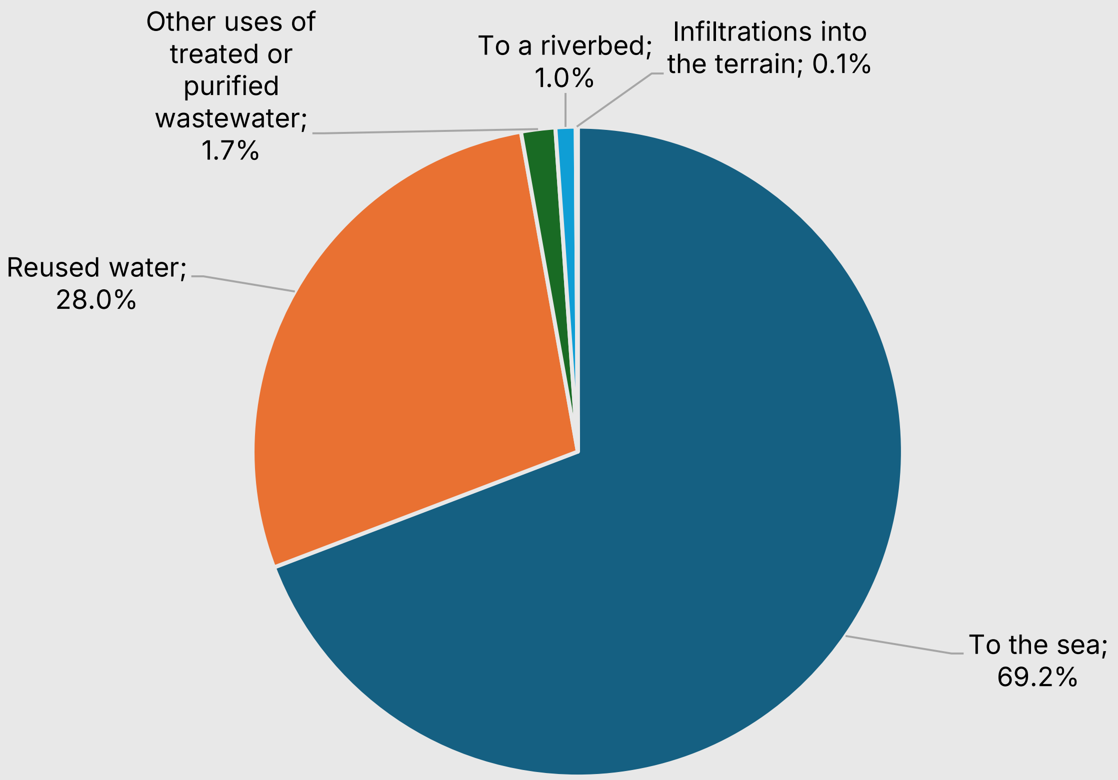
The management of treated wastewater in the Canary Islands shows a clear tendency towards marine discharge, a common practice in coastal regions, though one that could be improved. In 2022, the archipelago treated 373,856 m³ of wastewater, of which only 28% was reused. This limited contribution to the circular economy is due to the need for greater investment in treatment infrastructure and the expansion of urban sanitation networks to increase the volume available for reuse.

The growing presence of holiday rentals, which increase organic load without being fully reflected in population censuses, presents an additional challenge for water planning and regulatory compliance. Municipalities under high tourism pressure may exceed their treatment capacity if this demand is not factored into infrastructure planning. This calls for an update to equivalent population calculations and the adaptation of sanitation systems to the actual tourist flow. In this context, the recent regulatory updates on wastewater treatment and water quality, including the entry into force of Directive (EU) 2024/3019 on 1 January 2025 and Royal Decree 3/2023, introduce new requirements for municipalities in terms of wastewater treatment and water efficiency, with particular relevance in tourism-dependent regions such as the Canary Islands.

At the national level, reclaimed water is more widely used, particularly in agriculture and industry, demonstrating a more effective utilisation of the resource.

Given the island context and pressure on water resources in the Canary Islands, strengthening the reuse of treated water would be a key strategy to improve water security and reduce dependence on other sources.

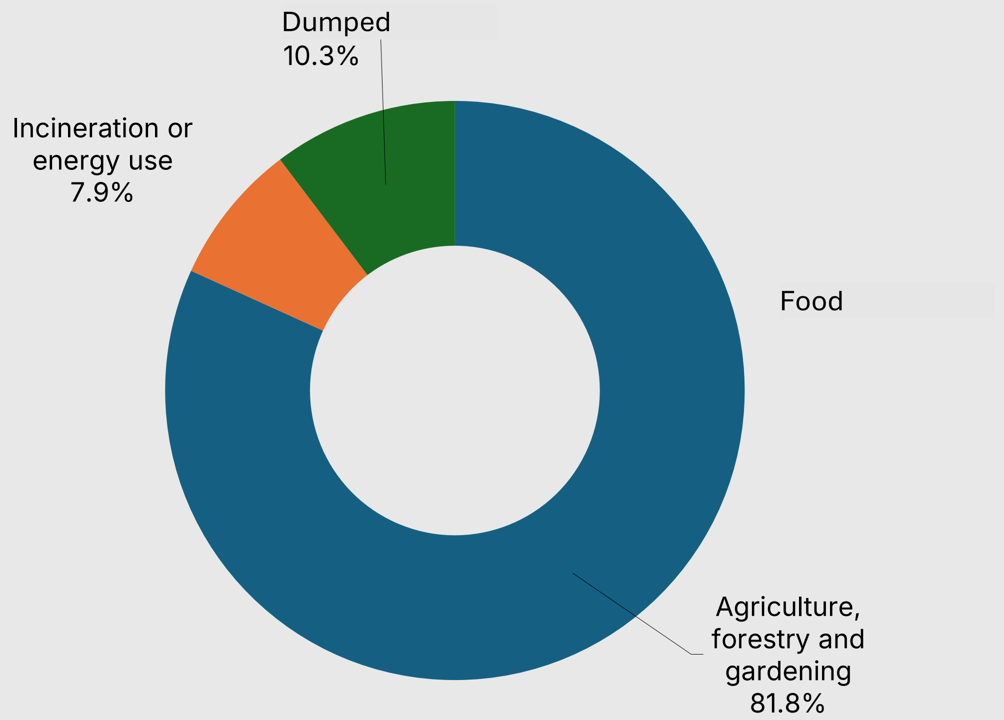
Distribution of treated wastewater according to destination in the Canary Islands (2022)



Source: Water Statistics Collection (ISTAC)

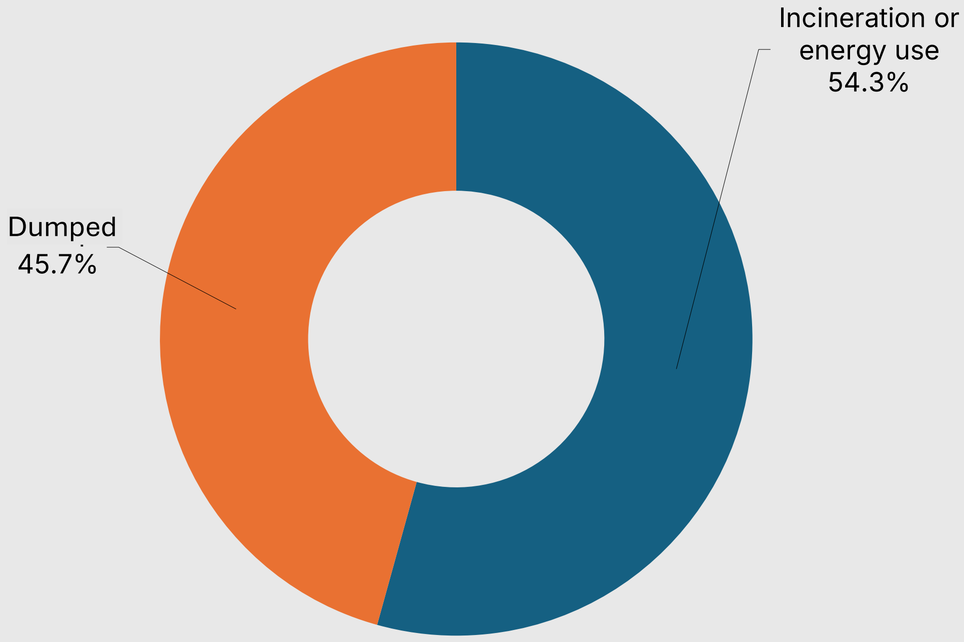
In 2022, Spain allocated the majority of sewage sludge to agriculture, forestry, and gardening, whereas in the Canary Islands this option was not utilised. Instead, priority was given to landfill disposal or incineration. This suggests the absence of tertiary treatment processes that would ensure the required quality for reuse, thereby limiting the potential for sustainable recovery.

Destination of sewage sludge generated in Spain in 2022



Source: Water Supply and Sanitation Statistics (INE)

Destination of the sewage sludge generated in the Canary Islands in 2022

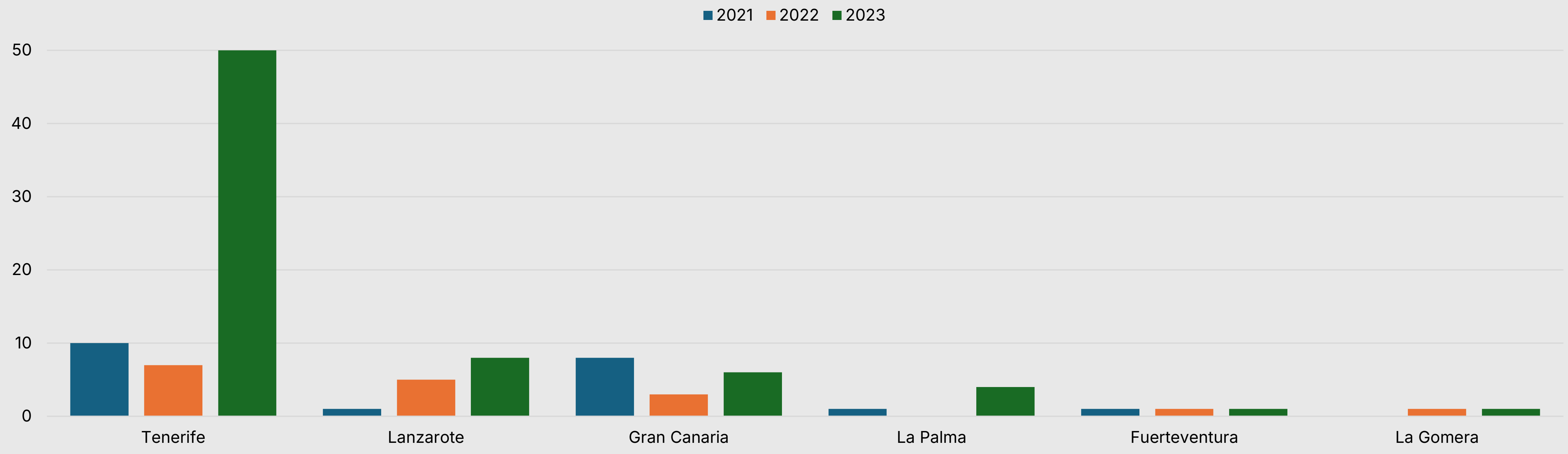


Source: Water Supply and Sanitation Statistics (INE)

Wastewater treatment in the Canary Islands is facing a structural crisis that has worsened in recent years, reaching a critical point in 2023 with 70 sanctioning procedures. Although this figure is lower than the historical peak of 224 procedures for ongoing non-compliance recorded in 2018, the renewed increase highlights the inability of institutions to contain a problem that affects both the environment and public health.

The lack of investment in adequate infrastructure and the prolonged inaction of local administrations have led to a rise in unauthorised discharges, particularly in municipalities that lack sufficient sewerage networks to facilitate wastewater treatment at existing facilities. Water pollution has resulted in beach closures and has exposed the inadequacy of sanitation systems across the islands.

Number of files opened by the Canary Islands Agency for the Protection of the Natural Environment for unauthorised discharges into the sea



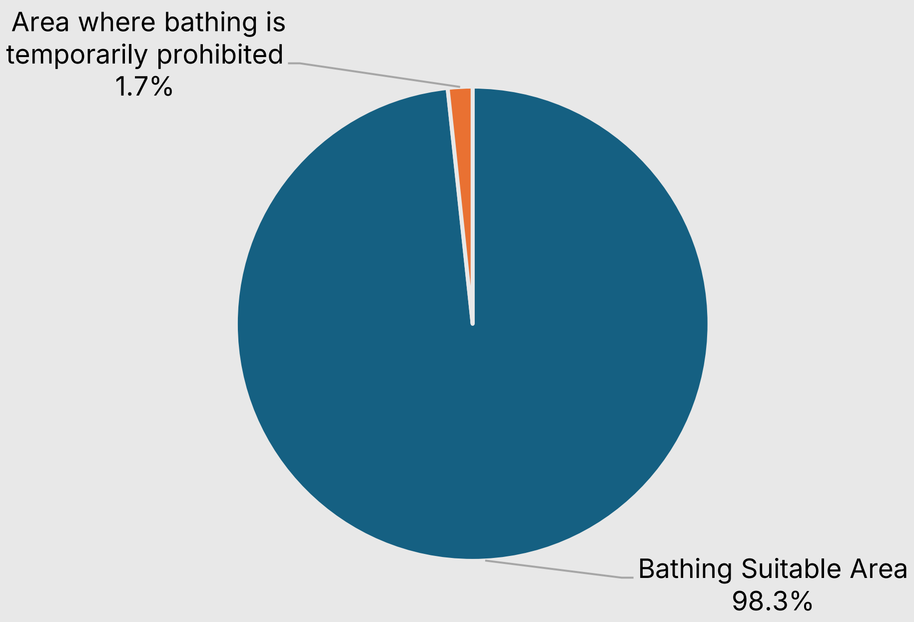
Note: El Hierro is not included in the representation due to the absence of open files in the years analysed. Source: Environmental Monitoring Statistics (ISTAC)

Bathing water quality

The overall status of bathing waters in the Canary Islands is highly favourable, with 98.3% of monitored areas deemed suitable for bathing. This reflects a high level of environmental quality and highlights the efforts made by authorities and relevant agencies in the continuous monitoring and control of water quality. Strategies such as wastewater treatment, sanitary surveillance, and the protection of coastal ecosystems appear to be having a positive impact on preserving bathing water quality.

The fact that only 1.7% of areas face temporary restrictions suggests that contamination issues are localised and limited to specific beaches. However, it is essential to pay special attention to these restricted areas to identify the underlying causes, such as potential discharges, waste accumulation, or natural phenomena that may affect water quality.

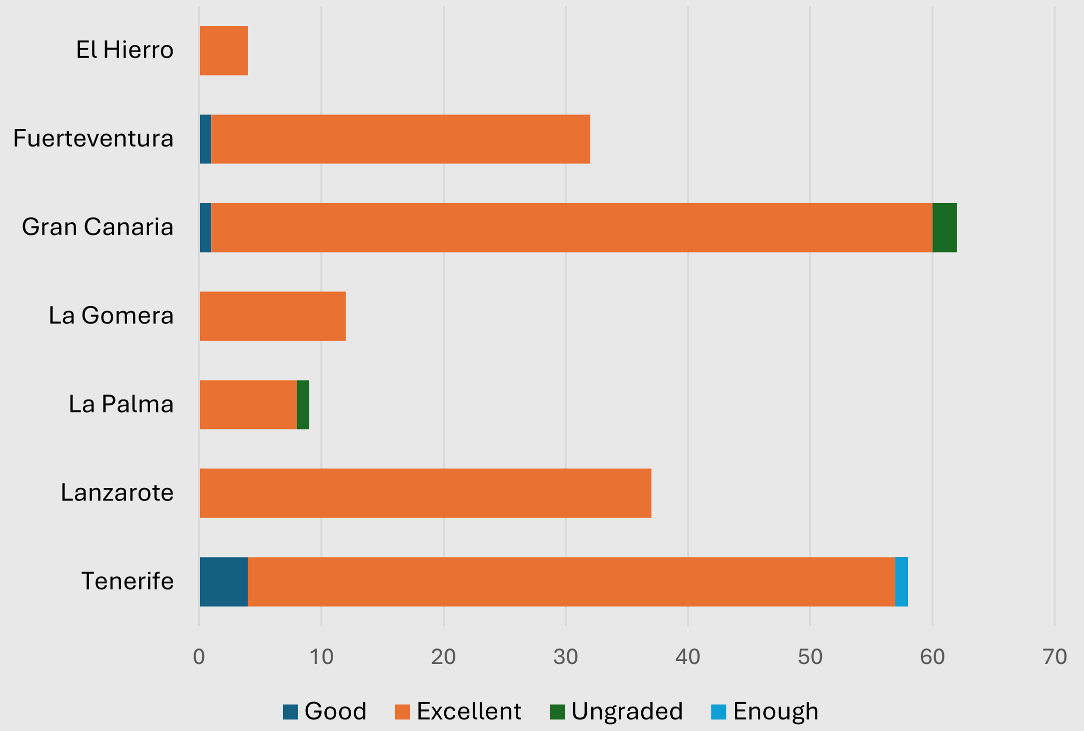
State of water quality for bathing in the Canary Islands in 2024



Note: Data is based on Ministry of Health sampling points, not total beaches.
Source: National Bathing Water Information System (Naiad)

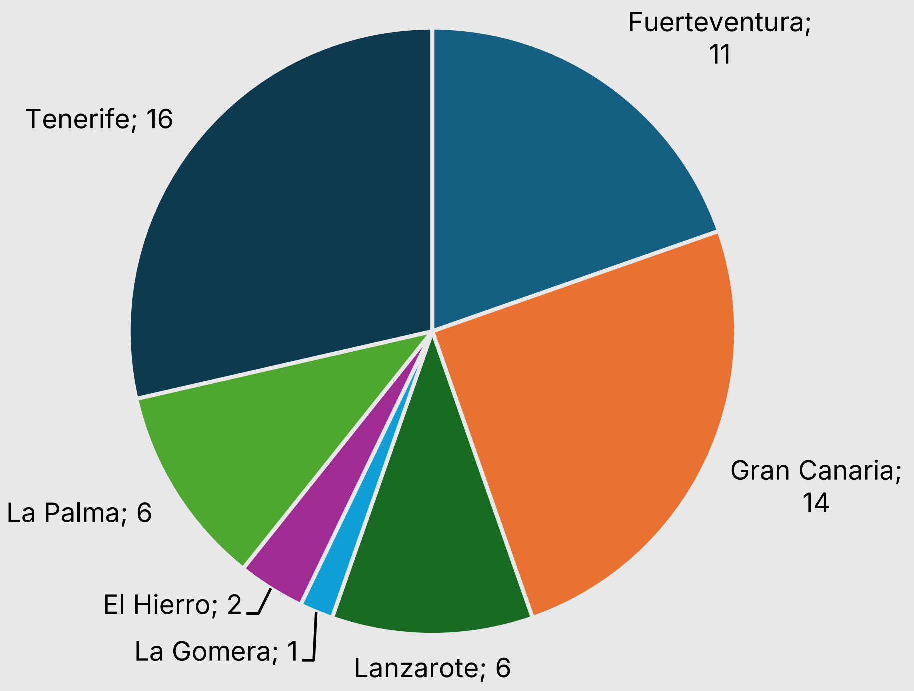
According to the 2023 National Census of Bathing Water Areas, most beaches in the Canary Islands archipelago are classified as having excellent water quality. The islands of Gran Canaria and Tenerife stand out for having the highest number of beaches, followed by Lanzarote and Fuerteventura. Lanzarote, along with La Gomera and El Hierro, is notable for maintaining excellent water quality across all its beaches. As for Blue Flag beaches, the archipelago boasts a total of 57, mainly concentrated in the four main tourist islands: Tenerife, Gran Canaria, Fuerteventura, and Lanzarote. Notably, La Palma has a high number of Blue Flags relative to its total number of beaches.

Number of beaches and bathing water quality per island (2023)



Source: National Bathing Water Information System (Naiad), Ministry of Health

Distribution of blue flag beaches by island in the Canary Islands (2024)

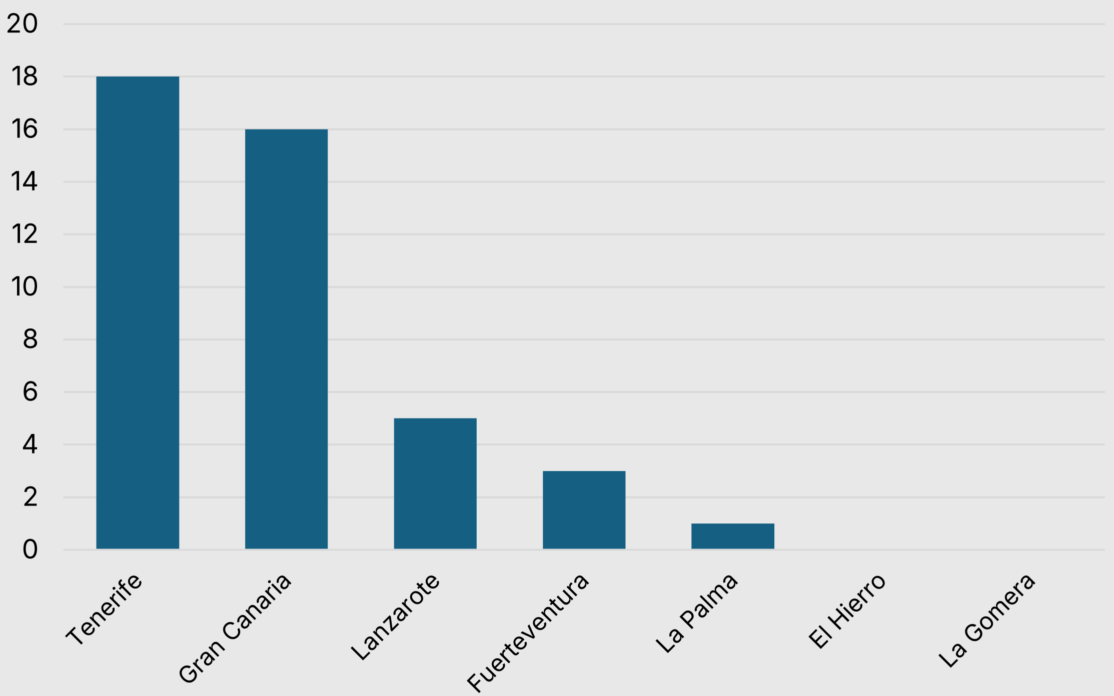


Source: Beaches with Blue Flag 2024 in Spain. ADEAC

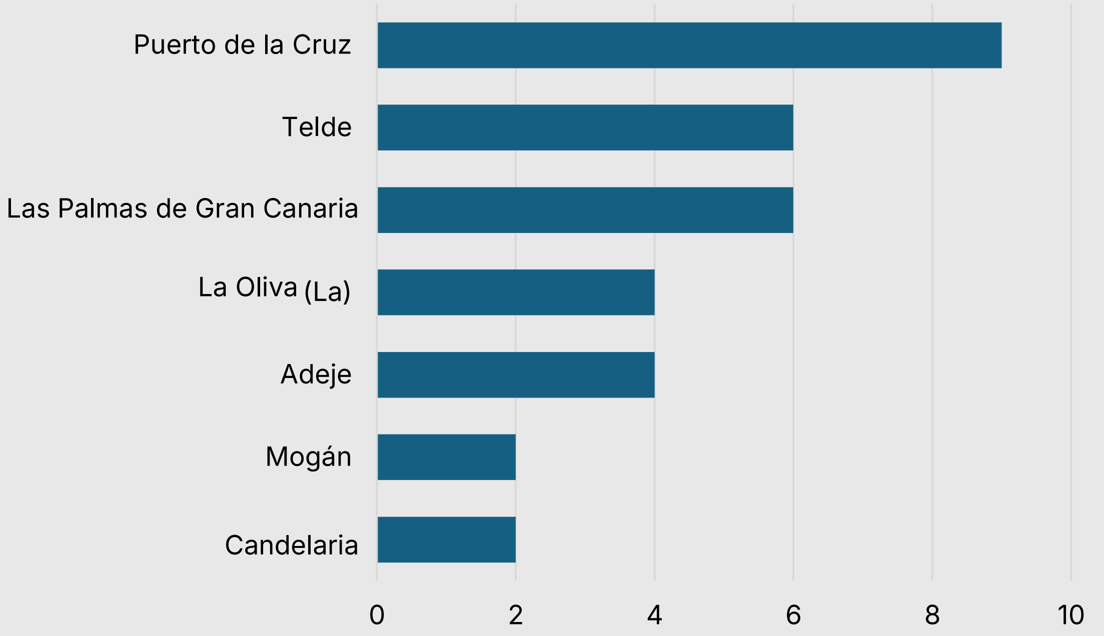
Between 2022 and 2024, there were a total of 43 bathing water quality incidents reported on Canary Island beaches. Tenerife and Gran Canaria account for the majority of closures by island, with 18 and 16 respectively, while El Hierro and La Gomera reported none reflecting the influence of population density and tourism on coastal pollution.

At the municipal level, Puerto de la Cruz tops the list with 9 closures, followed by Telde and Las Palmas de Gran Canaria with 6 each, indicating recurring water quality issues in urban and tourist areas. This highlights that, although bathing water quality across the archipelago is generally very high, certain beaches experience a significant number of incidents.

Number of incidents in water quality for bathing and temporary closures on Canary Islands beaches from 2022 to 2024 by island



Number of incidents in water quality for bathing and temporary closures on beaches from 2022 to 2024 by municipality



Note: Data is based on Ministry of Health sampling points, not total beaches. Source: National Bathing Water Information System (Náyade) (both graphs)

Water and wastewater management

Indicator	Description	Availability	Source	Remarks
Percentage of consumption in the tourism sector	Estimate of water use in 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 endowments by uses and do not offer homogeneous tourist 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 consumption per inhabitant and day in the area.	Occasional data	Estimating Academic Research Based on Previous Research	Indicators from official statistical sources, methodologies to understand and compare water consumption in tourism from the point of view of demand and supply are needed.
Water awareness among businesses	Percentage of tourism companies that take different measures to reduce water consumption.	Unavailable		
Uses of non-conventional water production systems in tourism: purification and desalination	Percentage of water use derived from water produced at the destination.	Occasional data	Canary Islands Water Centre Foundation	Updating is needed.

4.9

Solid waste management

Introduction

Waste management in the Canary Islands faces major challenges due to its territorial fragmentation and a tourism model that increases reliance on imported goods, generating high volumes of packaging waste and single-use products. This dynamic not only hinders source reduction but also imposes logistical and economic constraints on the development of circular economy policies, limiting the capacity for reuse and recycling in a territory where land availability for treatment infrastructure is scarce and transport costs are high.

Although the main integrated national waste recovery systems are implemented across all islands in the archipelago, local treatment infrastructures remain insufficient. The predominance of mixed waste among household and similar refuse—including that generated by the tourism industry—has resulted in approximately 95% of waste ending up in island landfills, many of which are already at capacity.

At both regional and island levels, the lack of detailed and up-to-date information on waste management represents a significant barrier to improving management systems. While the National Statistics Institute (INE) provides biennial data with certain indicators, it is limited and does not allow for a comprehensive analysis of the relationship between tourism activity and pressure on waste management systems. The lack of transparency in the sector further complicates an accurate assessment of its impact and the formulation of effective policies.

To better understand this issue, it would be essential to have disaggregated indicators by island and municipality, allowing for a more accurate evaluation of the pressure tourism exerts on waste management systems. In addition, there is a need to optimise the analysis of different waste fractions, which requires not only improving traceability but also advancing in the implementation of more effective municipal billing schemes, such as the pay-as-you-throw system established under the new Law 7/2022 on Waste and Contaminated Soil.

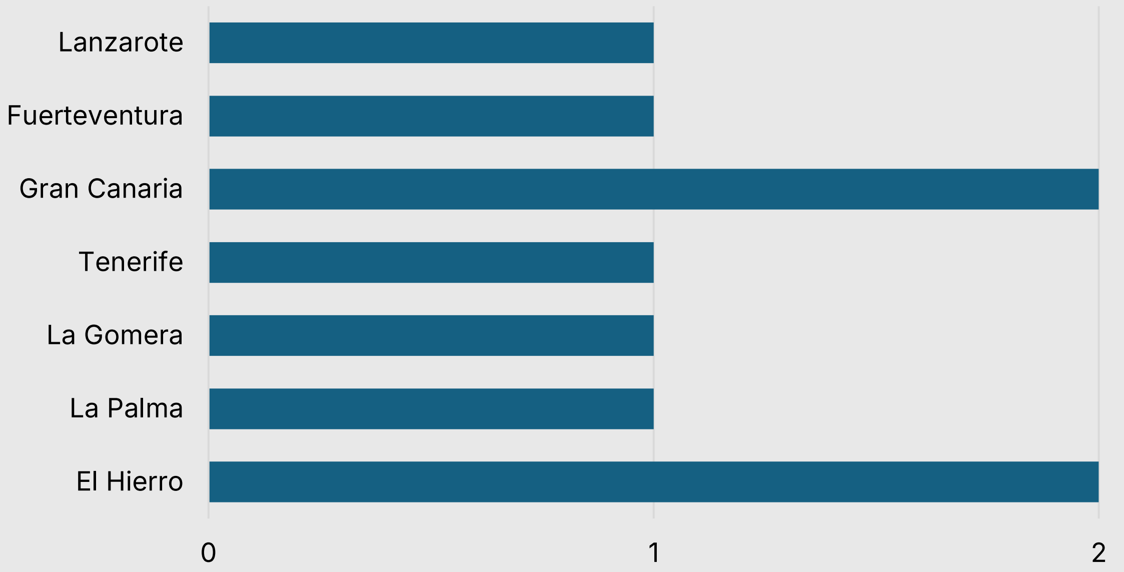
For these reasons, only indicators comparing the recovery efforts of various household waste fractions between the two Spanish island and tourism regions are included. While both regions share challenges such as landfill dependency and tourism pressure, the Balearic Islands achieved, in 2021, a selective collection rate 2.75 times higher than that of the Canary Islands.

Management infrastructure

In Spain, municipalities hold the responsibilities for the collection and treatment of household waste, which includes non-industrial waste generated by tourism-related activities. However, in the Canary Islands, responsibility for waste treatment has been transferred to the Island Councils (Cabildos), which organise their operations around two main types of facilities: Environmental Complexes and Transfer Stations.

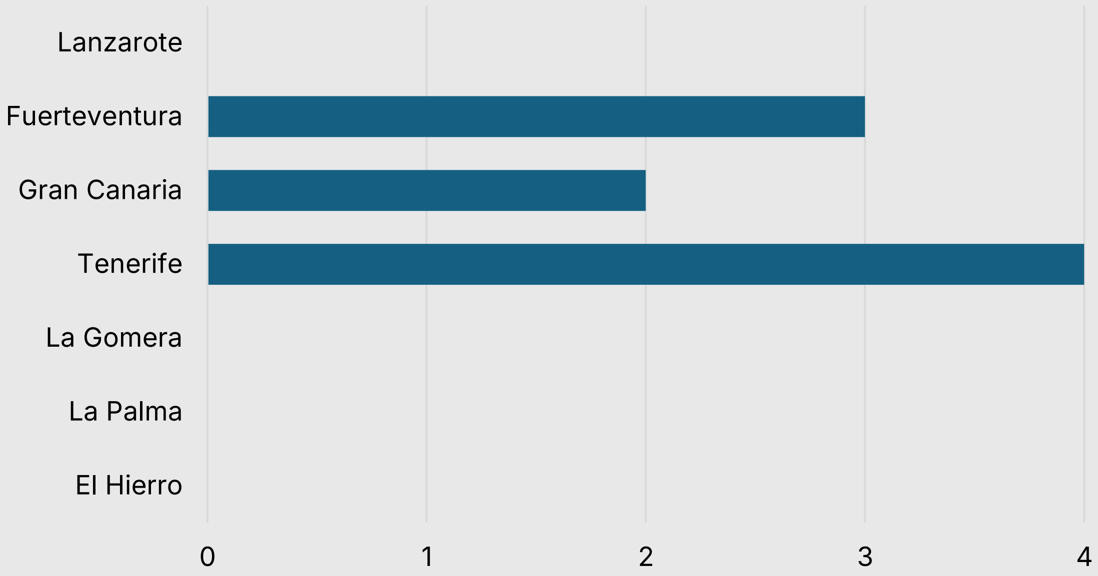
Environmental Complexes centralise the treatment of solid waste, including its recovery, processing or disposal, with an obligation to minimise the amount of residual waste sent to landfill. Transfer Stations, on the other hand, are key infrastructures for optimising waste transport. These facilities enable the compaction and transfer of waste from municipal collection systems to high-capacity vehicles, thereby improving the logistical efficiency of recovery operations.

Number of Environmental Complexes in the Canary Islands in 2024



Source: Government of the Canary Islands

Number of Transfer Plants in the Canary Islands in 2024



Source: Government of the Canary Islands

Household waste

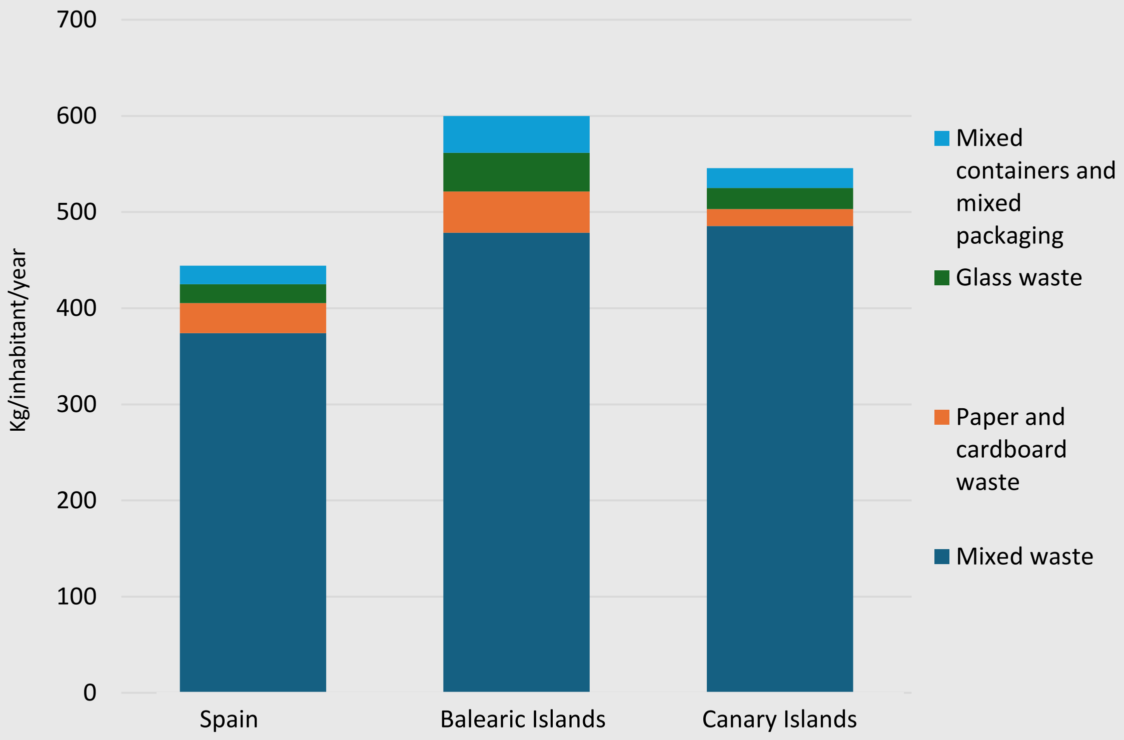
The Canary Islands and the Balearic Islands, as insular territories with intense tourism activity, face structural challenges in waste management. In the case of household and similar waste, both regions exceed the national average for per capita waste generation.

Despite this, there are notable differences in their treatment and recycling models. The Balearic Islands and the Canary Islands rank first and second, respectively, among Spanish autonomous communities in terms of per capita household waste generation.

Both regions significantly exceed the national average and show a high proportion of mixed waste, reflecting a continued reliance on landfill disposal—although the Balearic Islands have recently introduced incineration.

However, the Balearic Islands have optimised separate collection and achieved higher levels of waste recovery, whereas separation rates in the Canary Islands remain lower. These differences in performance are linked to factors such as stricter regulations, economic incentives, and more advanced infrastructure in the Balearic Islands.

Household and similar waste per capita collected by type of waste in the Canary Islands, the Balearic Islands and the national average



Source: Statistics on waste collection and treatment (INE). 2022

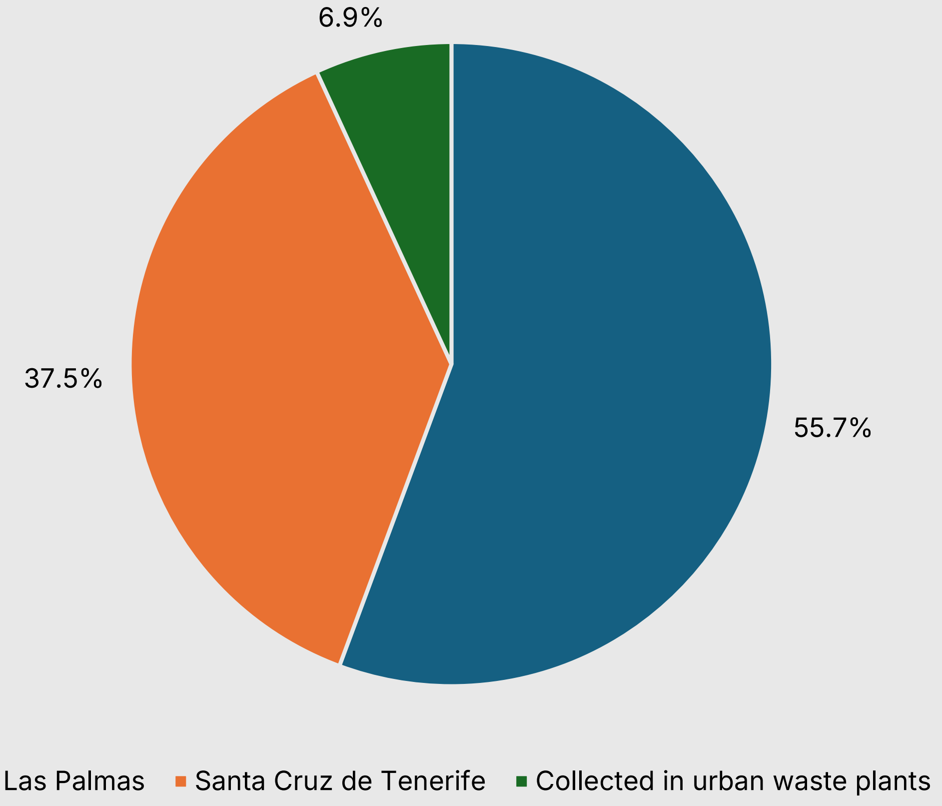
Glass

Regarding the fractions of household and similar waste in the Canary Islands, data from the 2023 waste management systems show that 52,027 tonnes of glass packaging were collected, with an uneven distribution between the two provinces.

In the province of Las Palmas, with a container-to-population ratio of 169 inhabitants per container—lower than that of Santa Cruz de Tenerife (174 inhabitants per container)—a higher amount of glass was recovered per inhabitant (24.8 kg/inhab.). This figure not only exceeds that of Santa Cruz de Tenerife (18.3 kg/inhab.) but also the national average (19.8 kg/inhab.). This difference suggests greater efficiency in collection, which may be attributed to a higher population concentration and/or greater public awareness. Public engagement, optimised collection routes, and improved infrastructure play a key role in enhancing glass recovery rates.

Additionally, the 7% of glass recovered at municipal waste treatment plants in the Canary Islands indicates that there is still room for improvement in source separation.

Proportion of glass containers collected by provinces and recovered in 2023

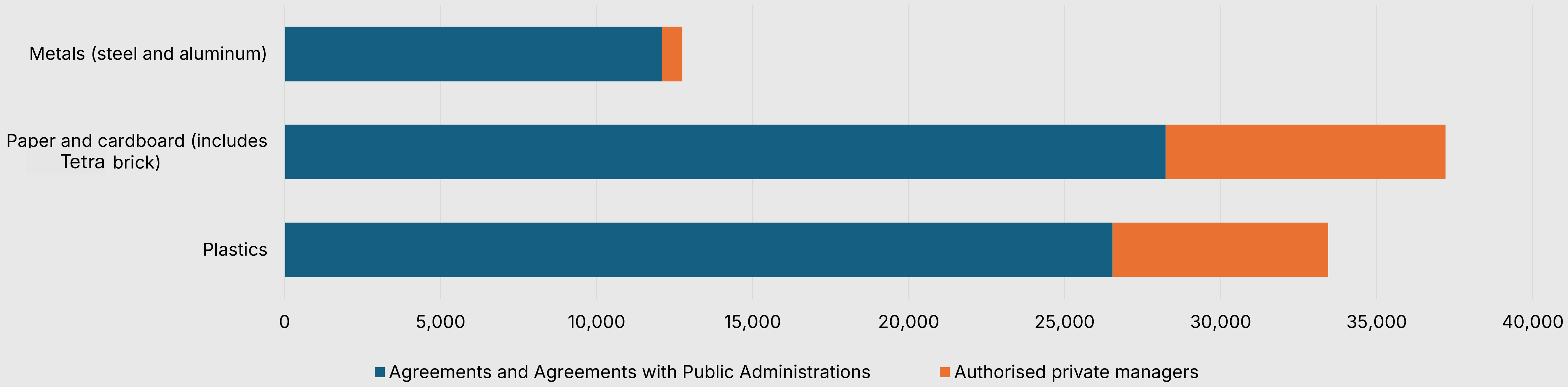


Source: ECOVIDRIO

Separate collection of packaging

In 2023, selective collection of packaging waste covered 2,177,701 residents of the Canary Islands—virtually the entire population. The region has five operational light packaging sorting plants, which processed a total of 83,404 tonnes of packaging waste requiring transport and treatment in facilities located outside the archipelago. These figures reflect a consolidated recovery infrastructure, though there remains room for improvement in terms of private sector participation and local recycling of the recovered materials.

Quantity (in tonnes) of recycled packaging by material and area of management in 2023

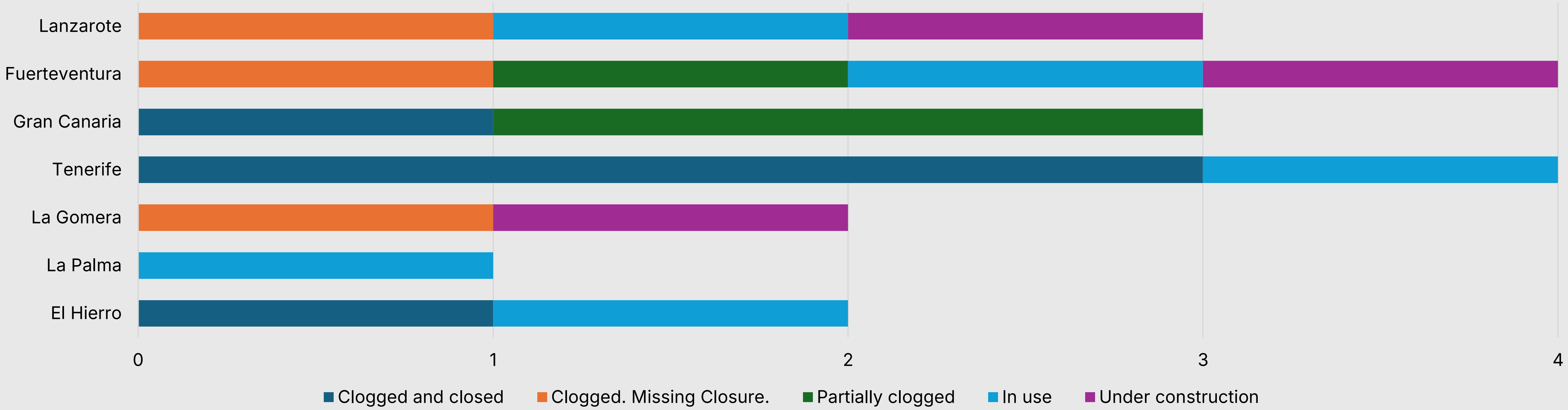


Source: Ecoembes. Packaging Recycling Data Certification and Controls Report (2023)

State of waste management infrastructures

Landfilling of household and similar waste in the Canary Islands is carried out in disposal cells. It is estimated that nearly 1.5 million tonnes are buried annually, particularly in the islands with the highest population and tourism intensity. The saturation of landfills, along with the lack of stabilisation and material recovery facilities, poses significant environmental risks, underscoring the need for new infrastructure and circular economy strategies. In addition, the Government of the Canary Islands is working on the regeneration of over 200 illegal landfills (not included in the graph), which have a considerable environmental impact.

Distribution of the state of the discharge cells of the environmental complexes of the Canary Islands according to their state in 2021



Source: Prepared by the authors based on the Resolutions of Integrated Environmental Authorisations

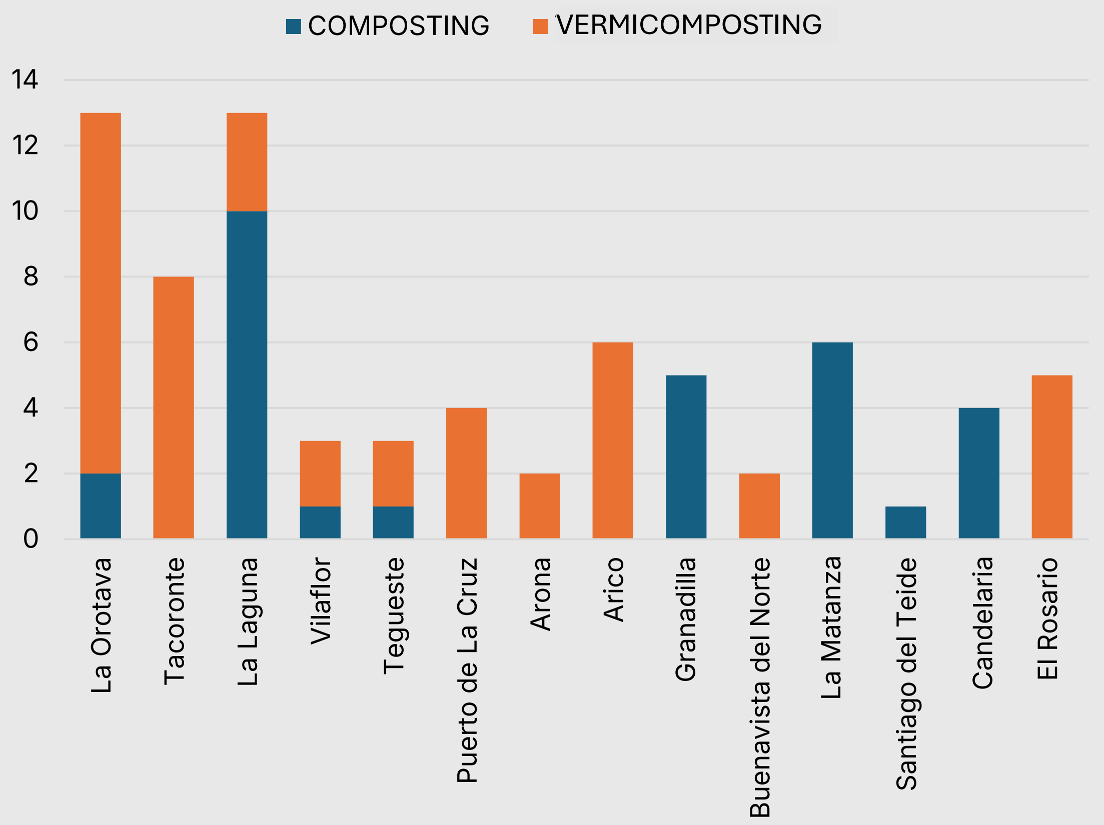
Bio-waste composting

One of the priority policies in the Canary Islands is the separation of organic waste to optimise the composting of bio-waste, commonly referred to as the fifth fraction. However, its implementation remains limited and largely depends on initiatives led by social collectives and the tourism sector.

While large-scale composting facilities are managed by the Island Councils (Cabildos), the lack of infrastructure adapted to current regulations highlights the need for significant investment in this area.

In Tenerife, composting implementation varies by municipality. The project "Circular Communities: Composting and Vermicomposting", launched in 2021, will be extended until 2026 with the development of new facilities. Additional initiatives are also in place at educational centres and the University of La Laguna. In other islands, notable efforts include the Community Composting Areas in La Palma, managed by ADER; the “Gran Canaria Composta” programme; and upcoming large-scale infrastructure developments in Fuerteventura and Lanzarote. These strategies combine citizen participation, environmental education, and technological optimisation to enhance bio-waste recovery across the archipelago.

Number of storage and vermicomposting stations in Tenerife in 2024

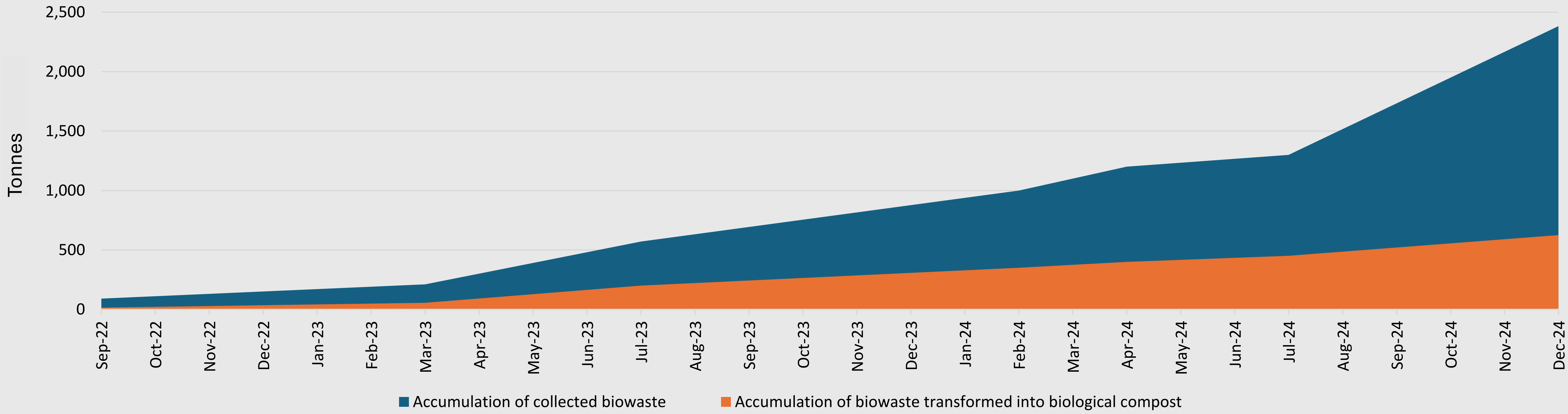


Source: Cabildo de Tenerife

Example of environmental initiatives in the tourism sector

The Circular Tourism Communities (CTC) project, promoted by ASHOTEL and ASAGA-ASAJA, connects the tourism and primary sectors to recover hotel bio-waste, mainly organic pre-consumer food waste and garden trimmings. Launched in 2022 with six establishments, the project has since expanded to include 24 hotels in the municipality of Adeje. In 2024, participating establishments collectively recovered 1,783 tonnes of bio-waste and 600 tonnes of green waste, producing 625 tonnes of high-quality organic compost and avoiding the emission of over 7,000 tonnes of CO_2 into the atmosphere. The project has been recognised in Segittur's Good Practices Guide on Circular Economy for its innovation and replicability, serving as a benchmark for integrating circularity into tourism.

Accumulation of bio-waste collected and transformed into compost by the CTC Project

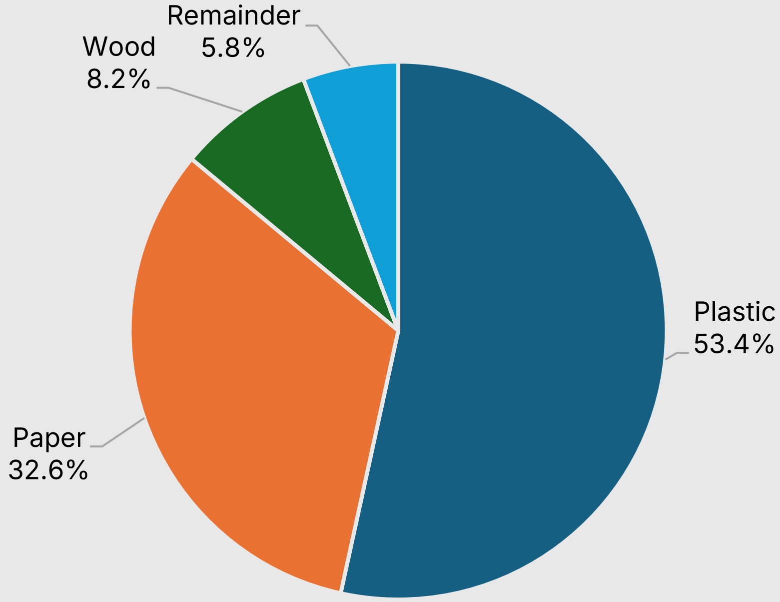


Source: Own elaboration based on news from the official CTC website and the guide to good practices in the circular economy promoted by destination and tourism companies (Segittur)

Waste on beaches

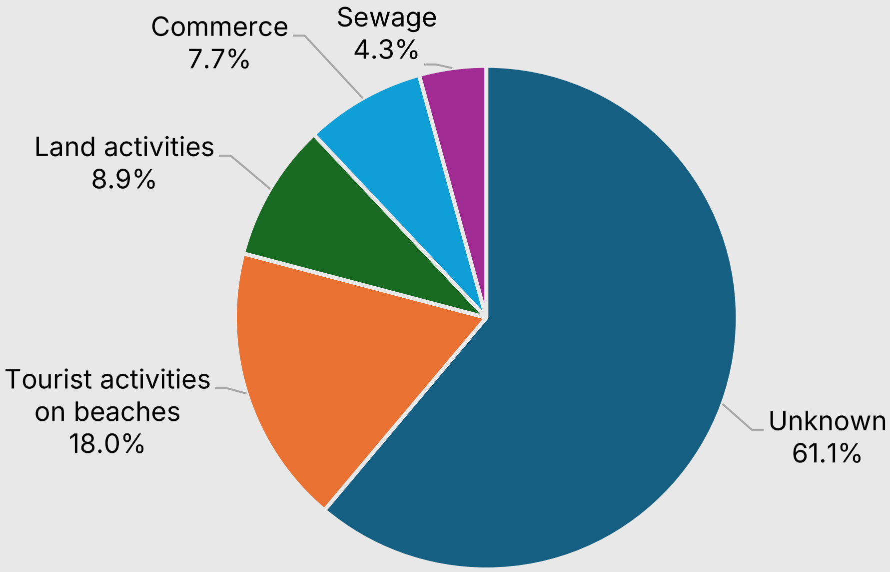
Municipal solid waste is not always deposited through formal collection systems and often ends up in natural and tourist environments, contributing to the pollution of these areas. The graphs illustrate this issue, showing that a large proportion of the waste collected on Canary Islands beaches consists of plastics and paper—materials linked to human consumption—and that in over 60% of cases, the source cannot be identified. This points to shortcomings in waste management and monitoring, as well as the need to improve traceability. Moreover, the influence of tourism and land-based activities on waste generation highlights the importance of preventive measures, such as strengthening collection infrastructure and implementing awareness campaigns. An integrated approach to waste management would help reduce environmental impacts and safeguard the quality of these spaces.

Types of waste collected on beaches in the Canary Islands in 2023



Source: Green Office of the Canary Islands

Origin of waste collected on beaches in the Canary Islands in 2023



Source: Green Office of the Canary Islands

MAIN INDICATORS OF AREA 9

Solid waste management

Indicator	Description	Availability	Source	Remarks
Volume of mixed waste produced by destination (pressure)	Tonnes per resident per year.	Partially available / occasional	Statistics on waste collection and treatment (INE) Academic Research	Regular data on the production and management of solid waste by tourism activities are needed.
Raising awareness of waste management in tourism	Percentage of tourism companies that classify different types of waste.	Unavailable		
Volume of waste sorted (recycling effort)	Percentage or volume of waste classified per resident per year.	Partially available / occasional	Statistics on waste collection and treatment (INE) Academic Research	Regular data on the production and management of solid waste by tourism activities are needed.

4.10

Natural capital supporting tourism. Protected areas and fragile ecosystems

Introduction

The natural resources of the Canary Islands are a key component of the destination's appeal and a crucial element for its differentiation. With an extensive network of protected areas covering a significant part of the archipelago, the islands offer a unique setting for nature-based tourism and outdoor activities. However, the growing number of visitors to these areas also presents major challenges in terms of conservation, tourism flow management, and environmental sustainability.

Activities such as hiking, diving, and whale watching have seen notable growth, diversifying the tourism offer beyond the traditional sun and beach model. Whale watching in southern Tenerife has made the Canary Islands an international benchmark, although concerns have also been raised regarding the regulation of vessel numbers and the impact on marine ecosystems. Management measures such as the Charter for Sustainability in Whale Watching in Tenerife and the access fee for the Barranco de Masca are examples of initiatives aiming to balance the tourism experience with environmental preservation.

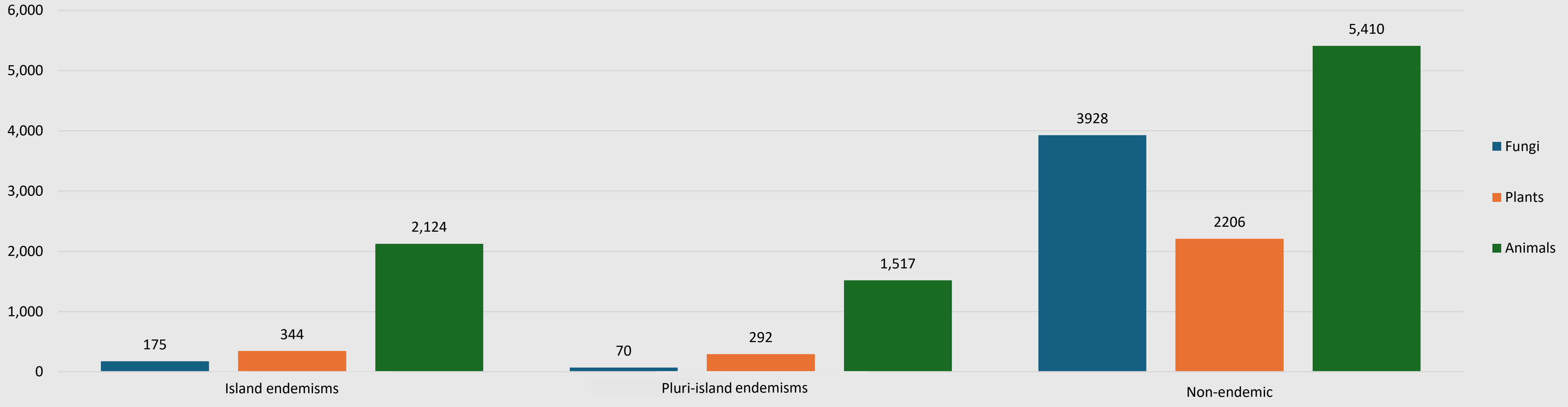
The archipelago's biodiversity, characterised by a high rate of endemism, enhances the ecological value of the destination but also makes it particularly vulnerable to human pressure. The increase in environmental infractions, especially in coastal areas, along with air quality issues in certain urban zones, highlights the need to strengthen environmental protection and improve land management.

In this context, it is essential to implement effective conservation strategies that minimise negative impacts and ensure compatibility between tourism use and the preservation of natural heritage. Regulating access to specific areas, diversifying the tourism offer, and promoting environmental education are key tools for ensuring the sector's sustainability and safeguarding the Canary Islands' valuable natural capital. The availability of greater technical and human resources for the maintenance and improvement of the protected areas system remains a priority for the coming years.

Biodiversity and endemic species

Biodiversity in the Canary Islands is a key natural asset that enhances the destination's uniqueness and adds value to sustainable tourism. The high rate of endemism in animal and plant species not only reflects the archipelago's ecological richness but also highlights the need for effective conservation strategies to mitigate the impacts of tourism and other human activities. Nature-based tourism and activities such as hiking can contribute to the appreciation and protection of this natural heritage, provided they are managed responsibly. Ensuring a balance between tourism promotion and the preservation of these unique ecosystems is essential for the sustainability of the tourism model in the Canary Islands.

Number of terrestrial species in the Canary Islands and endemic species (2024)

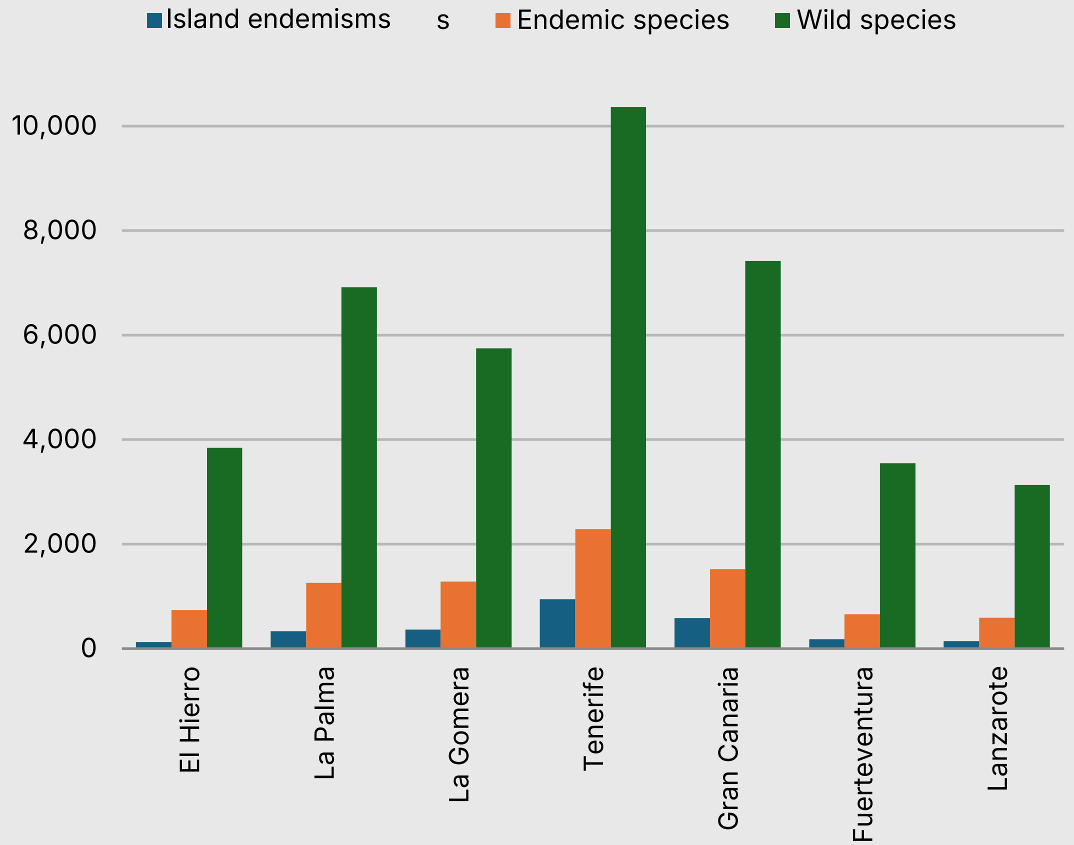


Source: Canary Islands Biodiversity Data Bank - BIOTA (Government of the Canary Islands)

The distribution of endemic species across the islands reveals a significant number of island endemics, species found exclusively on a single island. Their restricted presence is linked to specific ecological conditions and the natural fragmentation of insular ecosystems, making them particularly vulnerable to environmental changes and human pressure.

Endemic species exclusive to the archipelago but present on several islands are even more prominent. Tenerife, Gran Canaria, La Palma and La Gomera host a higher number of these species. The distribution of multi-island endemics and single-island endemics highlights the Canary Islands' biological richness and the need for conservation strategies tailored to each island. The limited territorial range of these species makes them especially susceptible to threats such as the introduction of invasive species, habitat degradation, and climate change.

Distribution of species by islands and number of endemic species (2024)



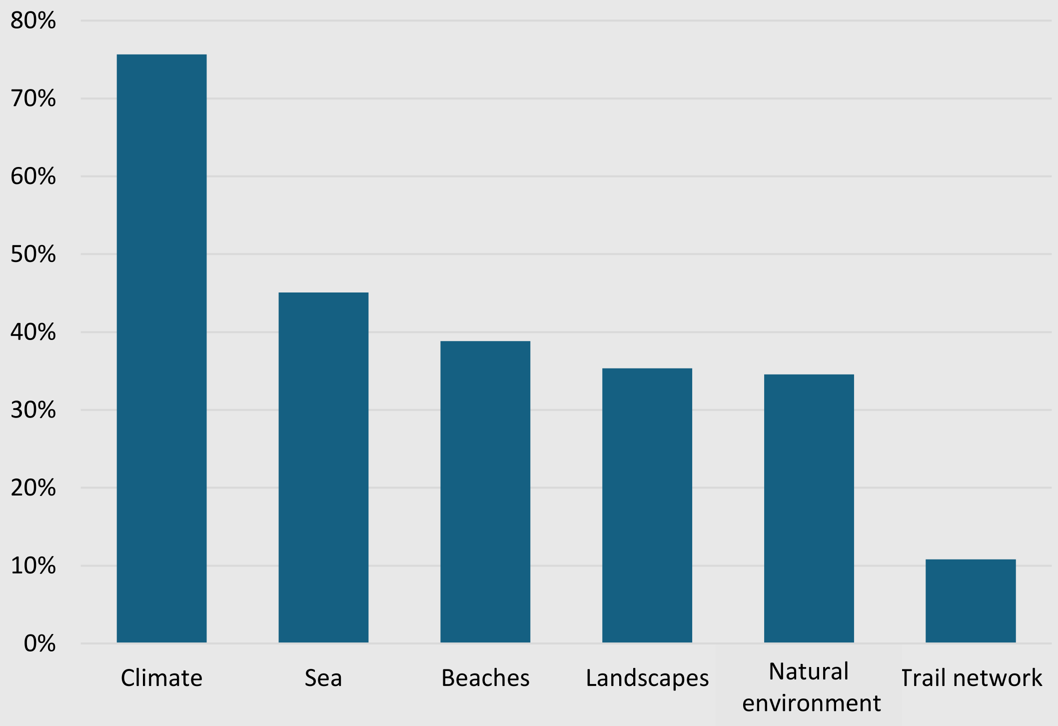
Source: Canary Islands Biodiversity Databank 2024 - BIOTA (Government of the Canary Islanc

Relevance of nature for tourists

Nature plays a significant role in the decision to choose the Canary Islands as a tourist destination, although the importance attached to each element varies among visitors. Among nature-related factors, climate stands out as the most decisive criterion, with 75.6% of tourists considering it a "very important" aspect in their travel decision, highlighting the appeal of the archipelago's climatic conditions.

The sea is ranked second, valued as a key factor by 45.1% of respondents, followed by beaches, which are mentioned by 38.8%. Other natural features, such as landscapes and the surrounding environment, are also considered by a substantial proportion of tourists, with similar percentages around 35%. The appreciation of the destination's ecological and scenic value suggests opportunities to promote nature-based and sustainable tourism segments. Additionally, just over 10% of tourists indicated that the trail network was one of the factors influencing their choice of destination.

Tourists (%) who consider nature-related aspects very important when choosing a trip to the Canary Islands (2024)

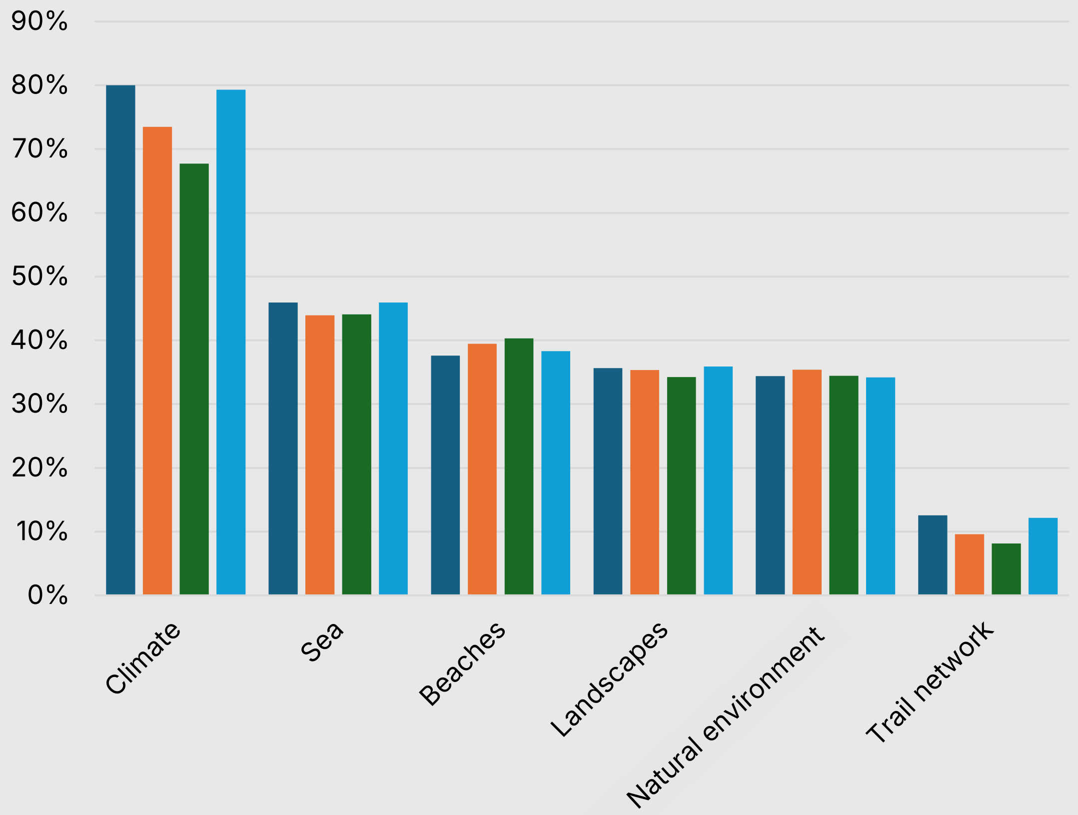


Note: "The possible responses are 'Nothing', 'Somewhat', 'Quite a bit', and 'A lot'. The percentage refers to 'A lot'." Source: Survey on Tourist Expenditure (ISTAC)

Tourists who visited the Canary Islands in 2024 identified climate as the most decisive factor in their travel decision, with consistently high ratings across all quarters of the year. Its importance is particularly marked in the first and last quarters, coinciding with winter, highlighting the appeal of the Canary Islands' mild climate as a winter refuge for tourists from colder regions. Other natural features such as the sea, beaches, and landscapes were also considered important, though with lower percentages and more moderate seasonal variation. Interestingly, the appeal of beaches is only slightly higher in summer, indicating that their enjoyment is not confined to the summer season.

The surrounding environment maintains a steady level of relevance for tourists throughout the year. In contrast, the trail network does not hold the same central importance as the other aspects. However, like climate, it is rated slightly higher in winter, suggesting that hiking is more appealing during cooler seasons, when heat is less of a deterrent and when conditions in tourists' home countries may be less favourable for outdoor activities.

Tourists (%) who consider aspects related to nature to be very important when choosing a trip to the Canary Islands by quarter (2024)

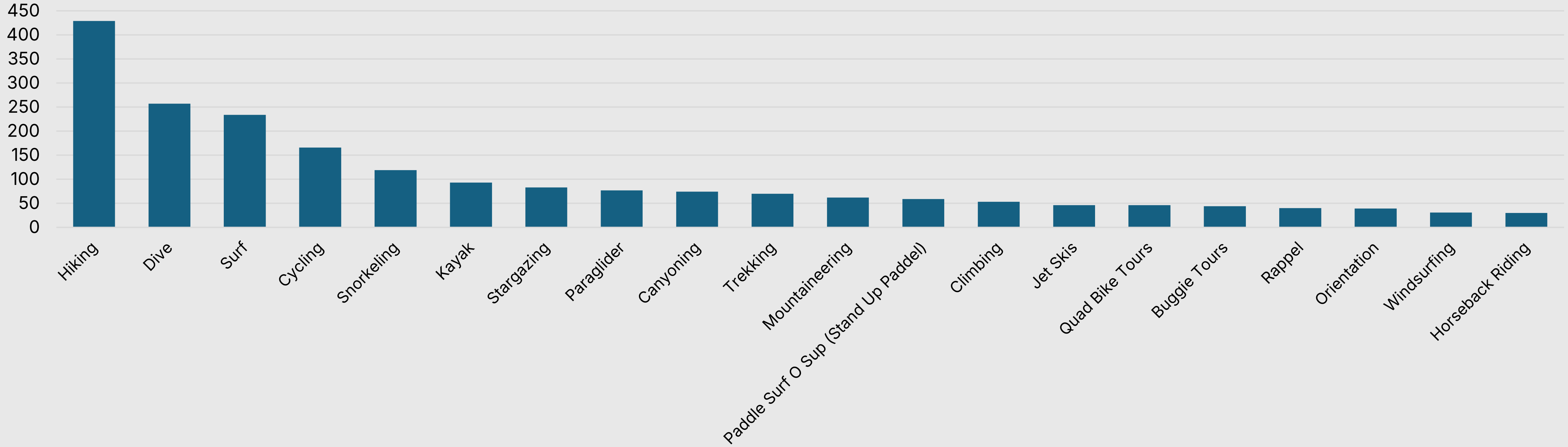


Note: "The possible responses are 'Nothing', 'Somewhat', 'Quite a bit', and 'A lot'. The percentage refers to 'A lot'. Source: Survey on Tourist Expenditure (ISTAC)

Registration of active tourism activities

Active tourism in the natural spaces of the Canary Islands has become a consolidated complement to the traditional sun-and-beach offer. Among the most frequently registered activities are hiking, with 429 companies, and water-based activities such as diving (257 registrations) and surfing (234), reflecting the importance of the archipelago's natural environment. Other options such as cycle tourism, snorkelling and kayaking highlight the need to diversify the offer. The wide range of registered activities, from stargazing to canyoning, demonstrates the strong potential of active tourism in the region.

Active tourism activities registered in the General Tourist Registry of the Canary Islands in 2024



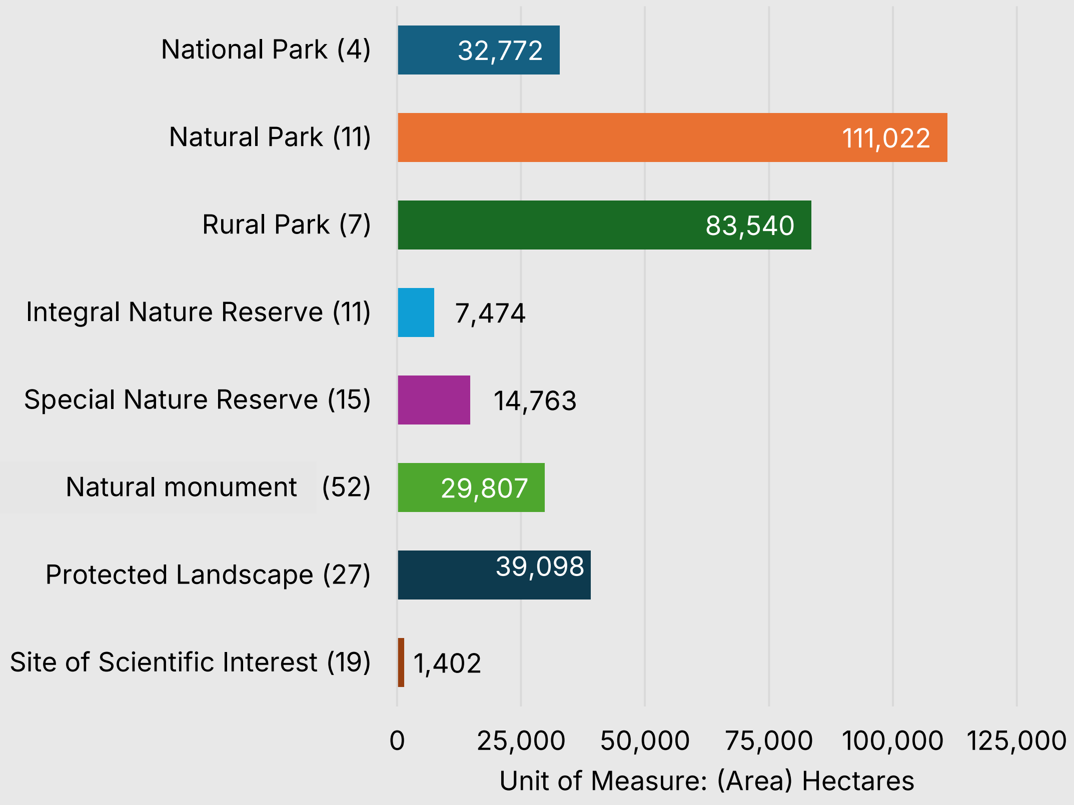
Note: The same company usually has several registered activities.
Source: Active tourism activities registered in the General Tourist Registry of the Canary Islands (Government of the Canary Islands)

Tourism in natural areas

Protected natural areas in the Canary Islands play a fundamental role in the region's tourism appeal, representing one of its key distinguishing features. The islands' landscape diversity and unique biodiversity make these environments essential components of the tourism offer. The existence of an extensive network of protected areas not only strengthens the image of the Canary Islands as a nature destination but also enables the diversification of tourism by attracting visitors interested in hiking, wildlife observation, and other outdoor activities.

In terms of surface area, Natural Parks represent the largest category, followed by Rural Parks. These designations often coincide with areas of high appeal for active and nature-based tourism. The most common designation is Natural Monument, with a total of 52 areas, followed by Protected Landscapes (27) and Sites of Scientific Interest (19). While some categories cover large areas, such as Natural Parks, others focus on the conservation of specific sites of high ecological and scenic value.

Surface area and number of protected natural areas according to protection figures by Canary Island



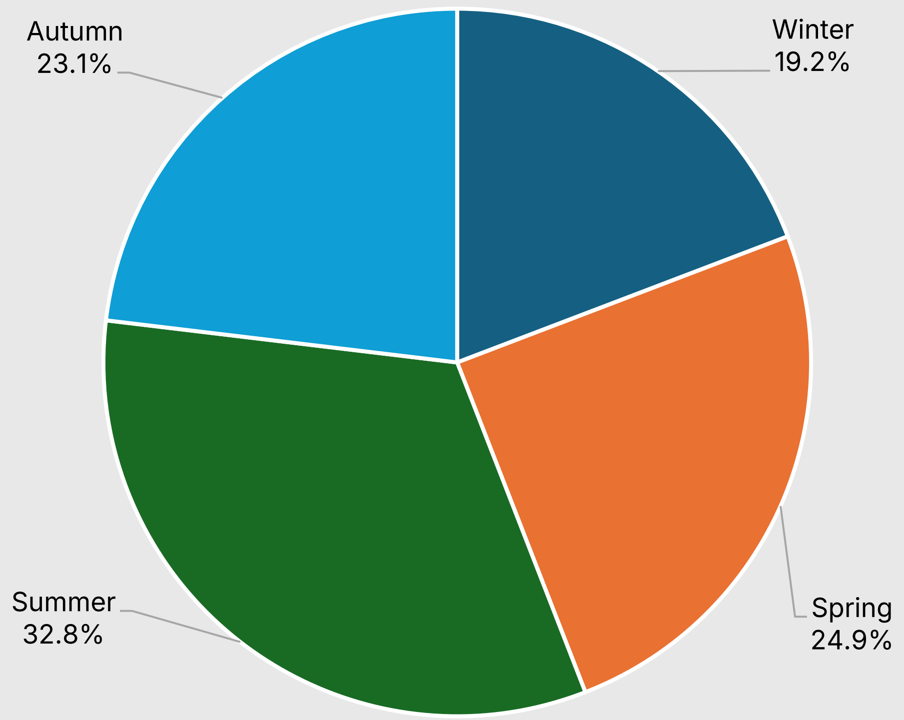
Source: Canary Islands Institute of Statistics (ISTAC)

Visits to protected areas

From a tourism sustainability perspective, the relatively balanced distribution of visits to national parks throughout the year is a positive factor, as it helps mitigate the impacts of seasonality while also preventing periods without visitation that could allow for ecosystem recovery.

This even distribution reflects the archipelago's stable climate and the low seasonality of tourist demand. Summer records slightly higher numbers, accounting for 32.8% of visits. Spring (24.9%) and autumn (23.1%) maintain similar figures, indicating steady interest in these spaces. Winter, with 19.2% of visits, shows the lowest influx, though without a sharp decline, demonstrating that national parks remain a consistent tourist attraction year-round.

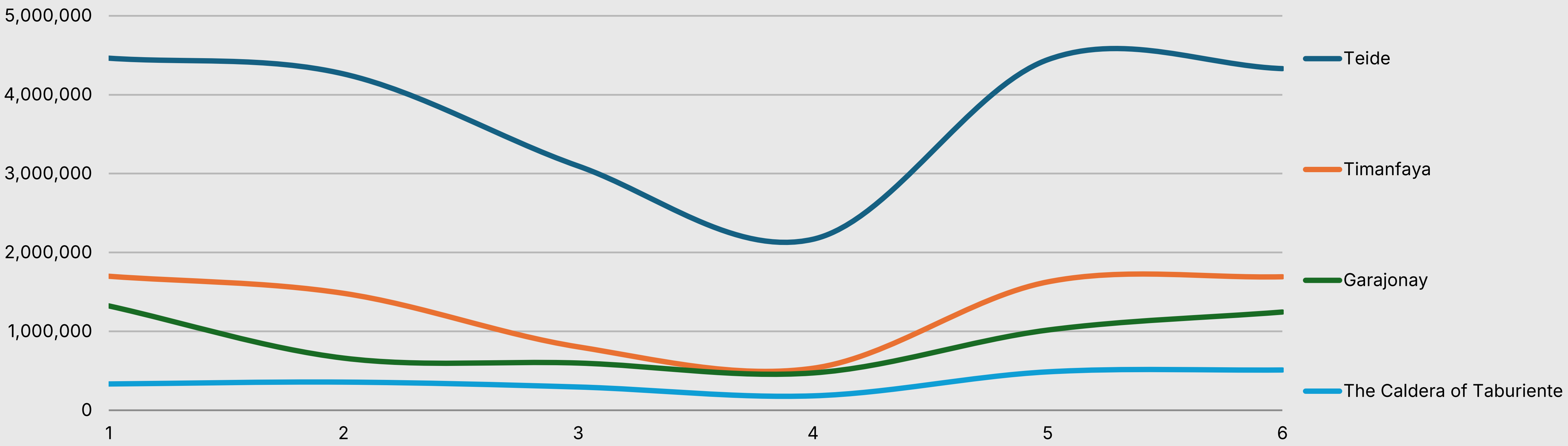
Distribution of visits to the National Parks of the Canary Islands by season (2023)



Source: SIR 2023 Survey and own elaboration. Visitors in the National Park Network, 2023, National Park Network

The recovery in visitor numbers following the pandemic demonstrates the resilience of these areas and their appeal to a segment of travellers seeking nature-based experiences. However, in some cases, particularly the surpassing of four million visitors at Teide National Park, this mass influx raises concerns due to its potential environmental impact. The park is characterised by open access, a lack of visitor flow management, repeated issues with parking, and insufficient control over visitor activities, all of which increase the vulnerability of the environmental values it aims to protect. It is essential to implement conservation strategies, access controls, and the promotion of good practices to balance tourism use with the preservation of natural heritage, ensuring that these spaces can continue to serve as drivers of sustainable development in the Canary Islands.

Evolution of the number of visitors in national parks in the Canary Islands

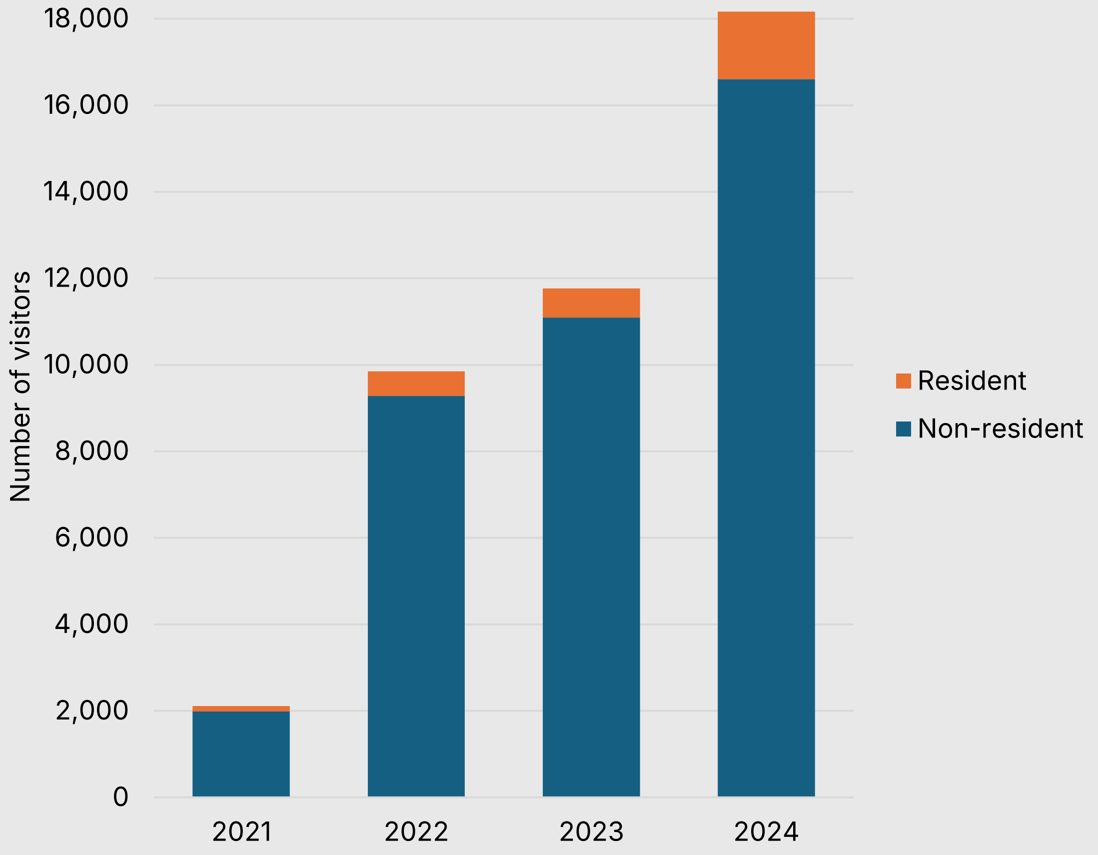


Source: Statistics on Protected Natural Areas (ISTAC)

The Cabildo of Tenerife has implemented an ecotax at the Barranco de Masca to regulate and control visitor access. This measure, in effect since mid-2024, sets a daily limit of 275 visitors to preserve the natural environment and ensure a safe and sustainable experience. The visit is free for residents of the island, while the fee is €3 for adult residents of other islands and €28 for non-resident adults.

The ecotax is allocated to the maintenance and conservation of the gorge, as well as to the improvement of related infrastructure and services. Access to the Barranco de Masca requires a prior reservation and payment of the corresponding fee. This initiative is part of the Cabildo's broader efforts to promote responsible and sustainable tourism on the island.

Annual visitors to Barranco de Masca

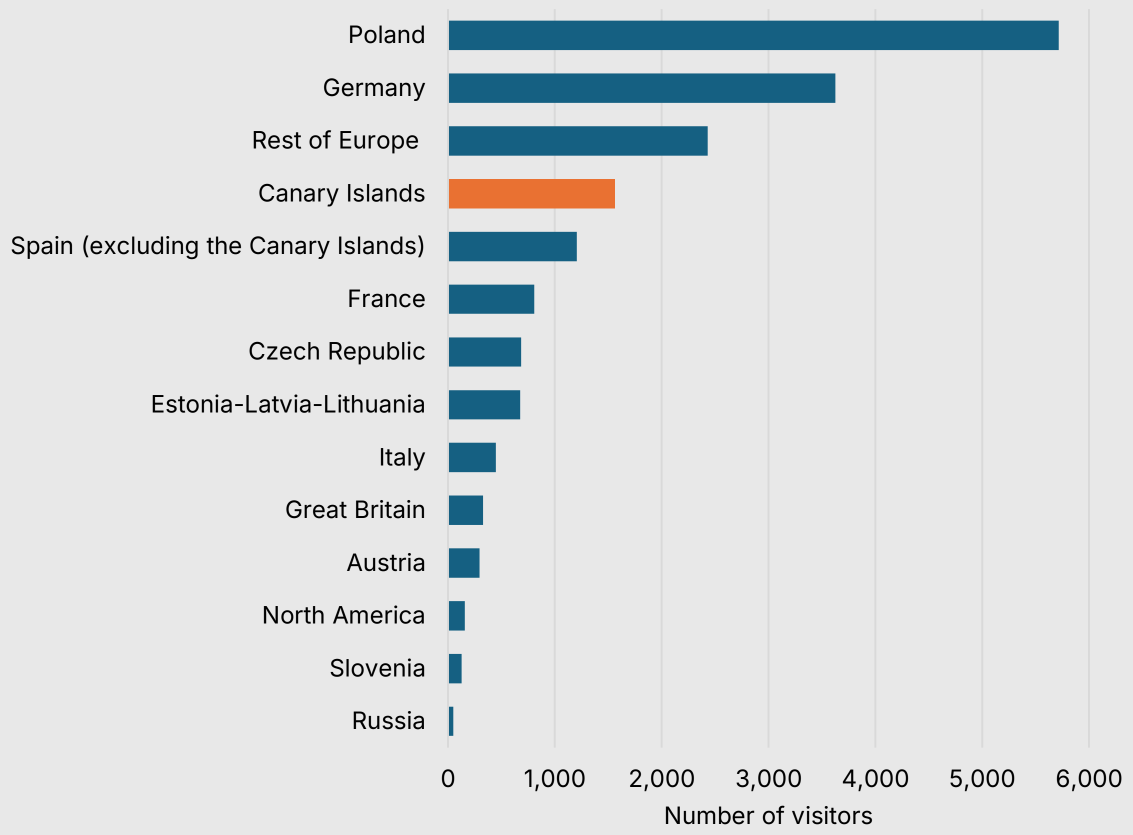


Source: Affluence to the Barranco de Masca (Cabildo Insular de Tenerife)

In 2024, most visitors to the Barranco de Masca came from Poland and Germany, while the presence of Canarian residents was noticeably lower than that of international tourists. This difference in visitor origin highlights the growing appeal of this natural site for inbound tourism, especially considering that residents of Tenerife can enter free of charge, and those from the rest of the Canary Islands pay a significantly reduced fee.

Since 2024, an access fee and daily visitor cap have been established to ensure the gorge's sustainability and reduce tourism pressure on this protected area. Beyond its conservation purpose, the access control system provides key data on the profile of visitors to Masca, such as their country of origin, seasonal trends, and frequency of return. This information is essential for the site's tourism management, supporting informed decision-making on visitor flow regulation, promotional strategies, and policy development aimed at fostering a more balanced and sustainable tourism model. Understanding the tourist profile also helps enhance the visitor experience. In this way, access control not only protects the natural environment but also contributes to a more sustainable tourism model that is better adapted to the needs of both visitors and the local community.

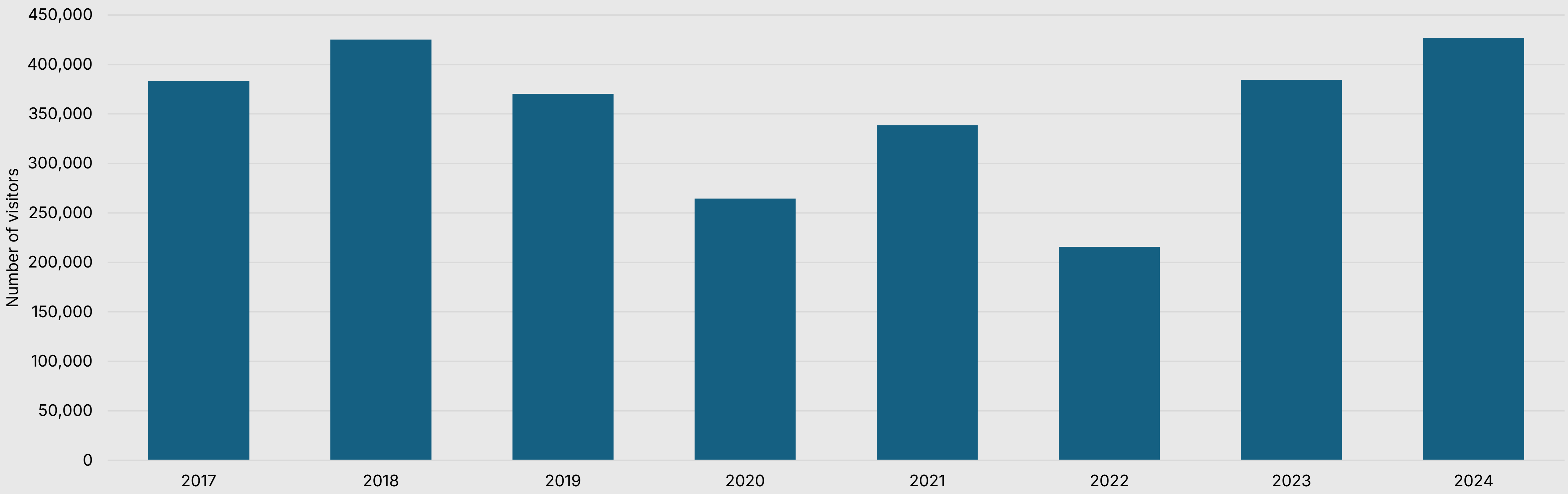
Visitors to the Barranco de Masca by origin (2024)



Source: Affluence to the Barranco de Masca (Cabildo Insular de Tenerife)

Another natural area with access restrictions in Tenerife is Punta de Teno. From 2022 onwards, visitor numbers gradually recovered, reaching a historic peak in 2024 with over 400,000 visitors. This growth reflects the site's strong tourism appeal, which justifies the implementation of vehicle access regulations to protect the natural environment and ensure a safe and sustainable experience for visitors.

Annual visitors to Punta de Teno



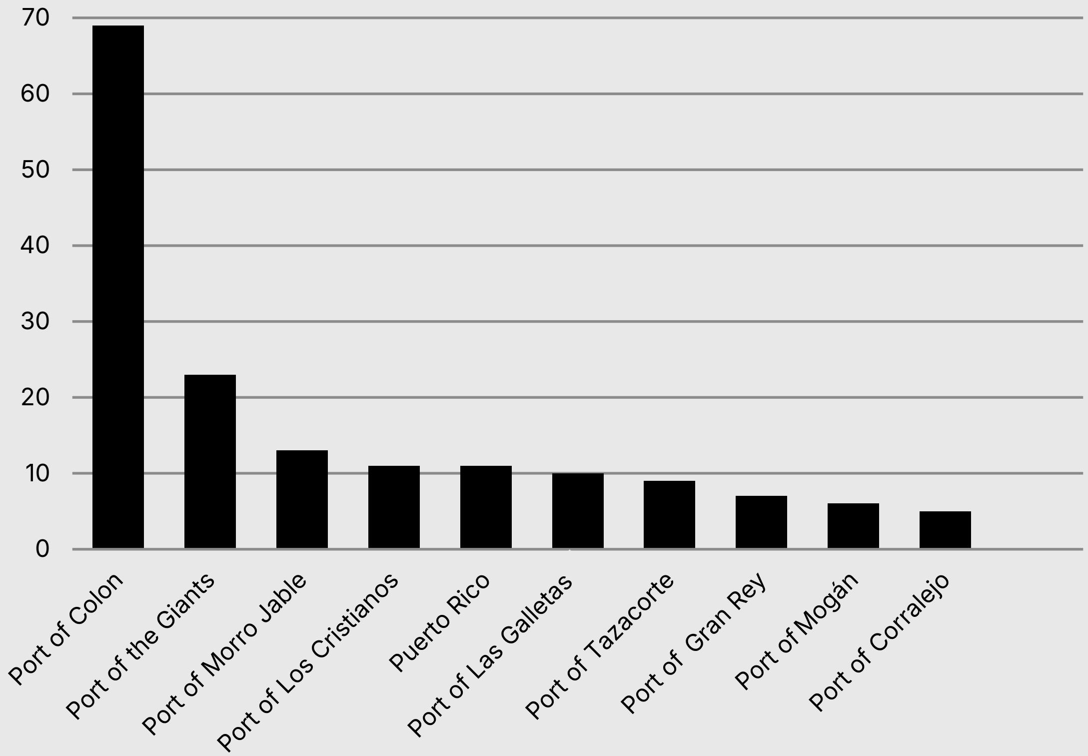
Source: Influx of vehicle access to Punta de Teno (Cabildo Insular de Tenerife)

Cetacean watching

Whale watching is one of the most prominent tourist activities in the Canary Islands, particularly in southern Tenerife, which hosts the highest number of registered vessels for this purpose. Puerto Colón leads with 69 boats dedicated to whale watching, followed by Puerto de Los Gigantes, also in Tenerife, with a significantly lower number. The importance of this activity in Tenerife is linked to the stable presence of cetacean populations in its waters, making the archipelago a leading destination for this type of tourism.

Outside Tenerife, other notable whale watching sites include Morro Jable in Fuerteventura, Puerto Rico in Gran Canaria, and Tazacorte in La Palma, reflecting widespread interest in this experience across several islands. However, this activity also presents sustainability challenges, particularly regarding the regulation of vessel numbers and the impact on marine species.

Main ports in the Canary Islands with whale watching boats in the Canary Islands (2024)

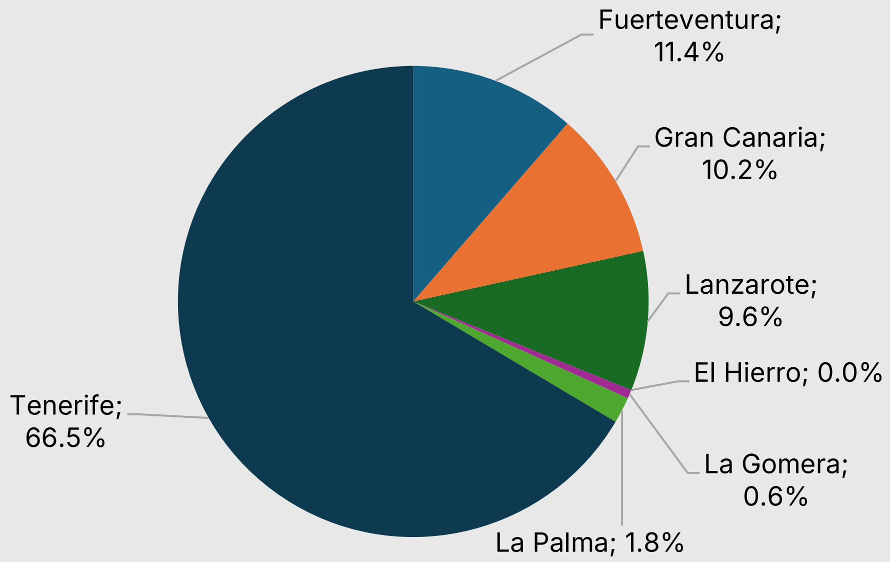


Source: General Tourist Registry of the Government of the Canary Islands

Open files for infractions

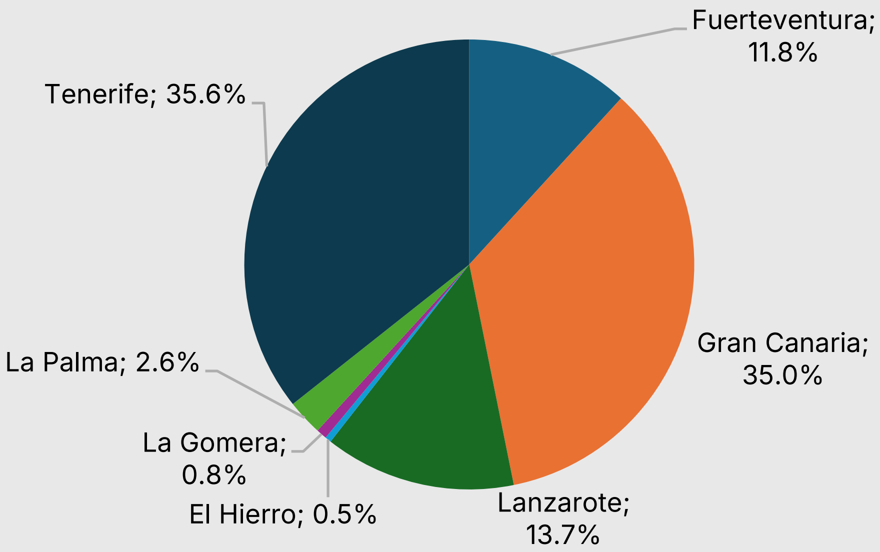
Tenerife accounted for 66% of all infringement cases related to the Coastal Law in 2023. Fuerteventura (11%), Gran Canaria (10%), and Lanzarote (10%) reported significantly lower figures. In contrast, the green islands, La Palma, La Gomera, and El Hierro, recorded minimal incidence, with percentages not exceeding 2%. Between 2019 and 2023, infringement cases show a similar distribution between the two capital islands: Tenerife (36.6%) and Gran Canaria (35.0%). Lanzarote and Fuerteventura accounted for 13.7% and 11.8% of cases respectively over this period. The smaller western islands registered much lower figures, all below 3%.

Distribution by islands of the files opened for infringements of the Coastal Law in 2023



Source: ISTAC based on data from the Canary Islands Agency for the Protection of the Natural Environment

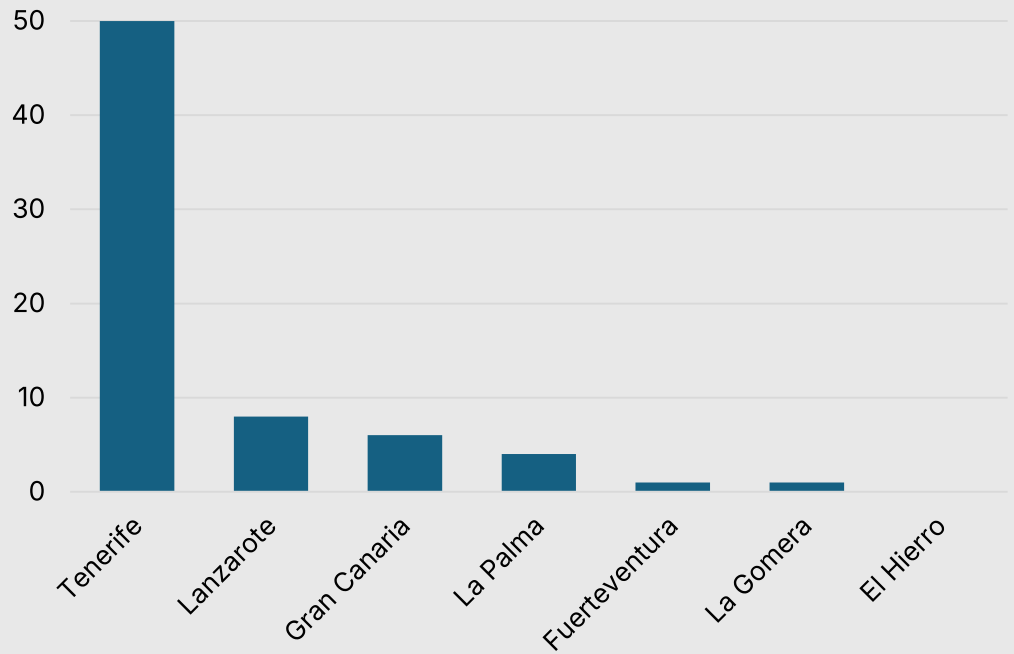
Percentage of files opened due to infringements of the Coastal Law (2019-2023)



Source: ISTAC based on data from the Canary Islands Agency for the Protection of the Natural Environment

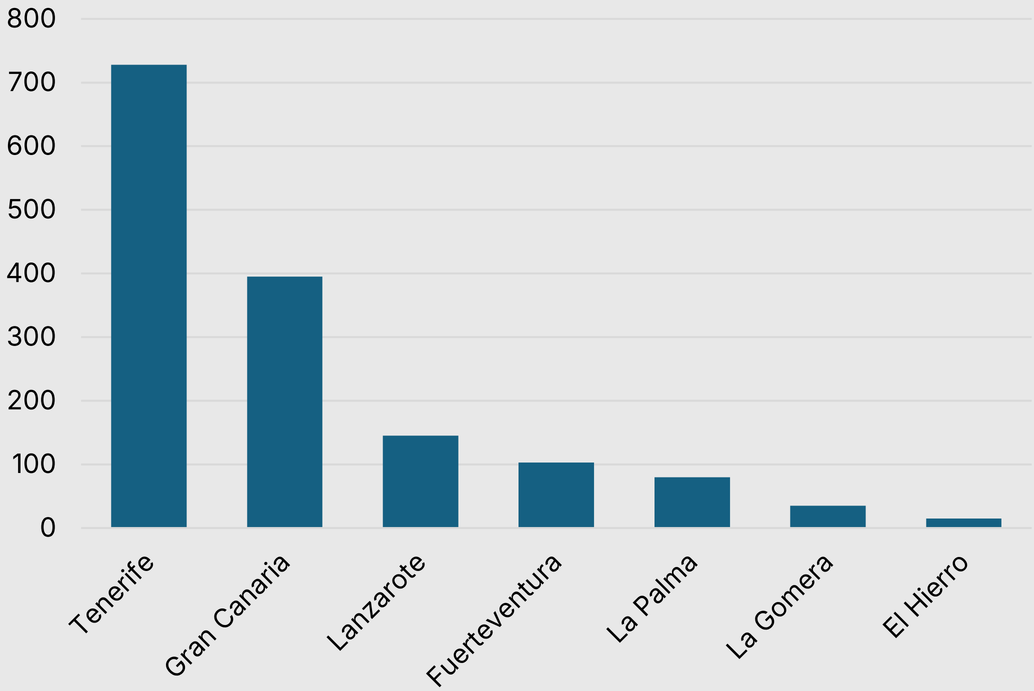
In 2023, the Canary Islands recorded the highest number of marine discharge infringement cases in Tenerife, with 50 cases representing 63.8% of the total, followed by Gran Canaria with 17.7% and Lanzarote with 11.4%. Fuerteventura and the green islands, La Palma, La Gomera, and El Hierro, stood out with values below 4%. From a broader perspective, between 1999 and 2023, Tenerife consistently registered the highest number of cases, followed by Gran Canaria, with a significant gap compared to the other islands. Lanzarote and Fuerteventura showed moderate figures, while the so-called green islands recorded considerably fewer cases.

Files opened due to infringements for discharges in 2023



Source: ISTAC based on data from the Canary Islands Agency for the Protection of the Natural Environment

Files due to infringements due to discharges (1999-2023)



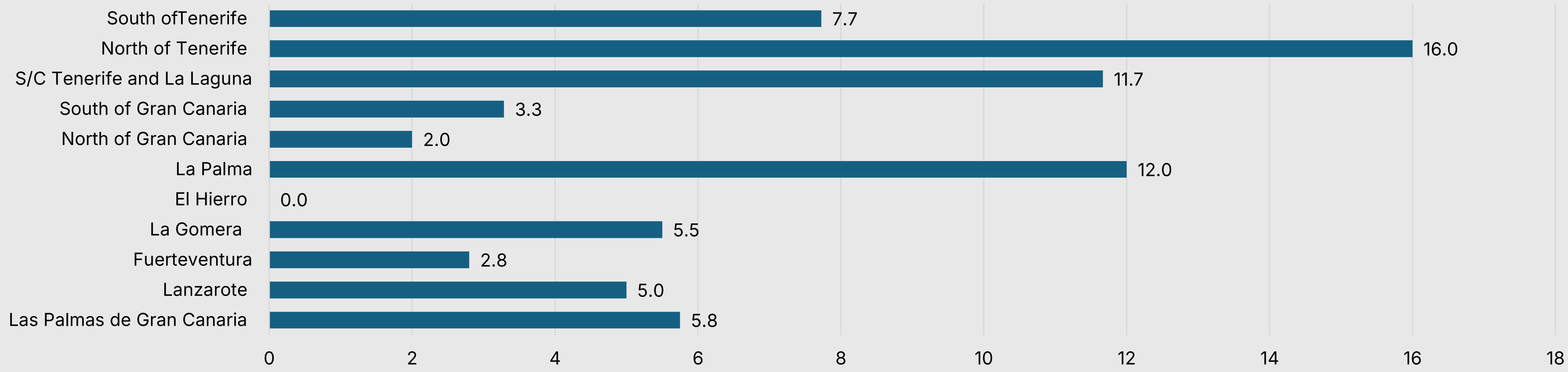
Source: ISTAC based on data from the Canary Islands Agency for the Protection of the Natural Environment

Air quality (excluding calima episodes)

Air quality is a key component of natural capital and a critical indicator of environmental sustainability in tourism across the Canary Islands. Data on exceedances of the daily limit values for 2.5ppm and 10 ppm particles in 2023, excluding natural causes such as haze, reflect the influence of human activities on air pollution. The areas with the highest number of exceedances were northern Tenerife (16), the metropolitan area of Tenerife, and La Palma (12 each).

In contrast, the lowest incidence was recorded in islands such as El Hierro (0) and in less urbanised areas, reinforcing the importance of preserving the archipelago's natural assets and promoting low-impact tourism development models. These findings highlight the need to integrate sustainable mobility policies and emissions reduction measures into both the tourism sector and the broader economy.

Number of daily limit value improvements for airborne particles between 2.5 and 10µm in 2023, excluding natural causes (haze)



Note: average of the stations in each area. Source: Canary Islands Air Quality Report (2023), Ministry of Ecological Transition and Energy, Government of the Canary Islands

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 to assess the state of conservation of all European protected areas belonging to it.	Available	Government of the Canary Islands	It allows comparability between territories.
Number and percentage of emblematic species for tourism (birds, marine mammals, reptiles) that are threatened	The emblematic species are those that attract visitors.	Available	Government of the Canary Islands	Once nature tourism experts provide the list of the most relevant ones, conservation experts will provide their conservation status.
Visits and appreciation of protected natural areas by tourists		Partially available		
Residents' assessment of the influence of tourism on natural resources and protected areas		Unavailable		
Percentage of protected areas with effective management (management, staffing and annual plan evaluation)	The quality of management is essential for the conservation and enhancement of protected natural areas.	Partially available	Government of the Canary Islands	To do this, it is necessary to have management personnel and plans that are subsequently evaluated.
Number and area of managed marine territory and spaces subject to planning	The natural habitats and landscapes relevant to tourism are many more than those protected by law.	Available	Government of the Canary Islands	Spaces not protected by law can also be conserved through social stewardship schemes that are appearing in Europe and the Canary Islands.
Activity indicators of companies that offer activities in nature		Partially available		Identify seals and codes of good practice for each company.
Air Quality Index		Available		
Existence of open files of infringements of the Coastal Law and discharges into the sea	Number of open files.	Available	Government of the Canary Islands	

4.11

Climate change and mitigation

Introduction

Climate change is one of the main global challenges of the 21st century, and its effects are increasingly evident in the Canary Islands. The archipelago's particular vulnerability to phenomena such as rising temperatures, water scarcity, biodiversity loss, and the intensification of extreme weather events calls for urgent and sustainable mitigation measures.

In recent years, data have shown a growing public awareness of the issue, with a majority of the Canarian population acknowledging the existence of climate change and its impact on the island environment. However, challenges remain in implementing effective actions to reduce greenhouse gas emissions, especially in key sectors such as energy and transport, which are the main contributors to the region's carbon footprint.

This thematic area examines the current state of climate change in the Canary Islands, air quality, and perceived environmental risks, as well as mitigation strategies and actions taken by both the population and institutions. With an evidence-based approach that integrates scientific data and public perception, it aims to provide a comprehensive diagnosis to support decision-making on sustainability and climate adaptation in the tourism sector.

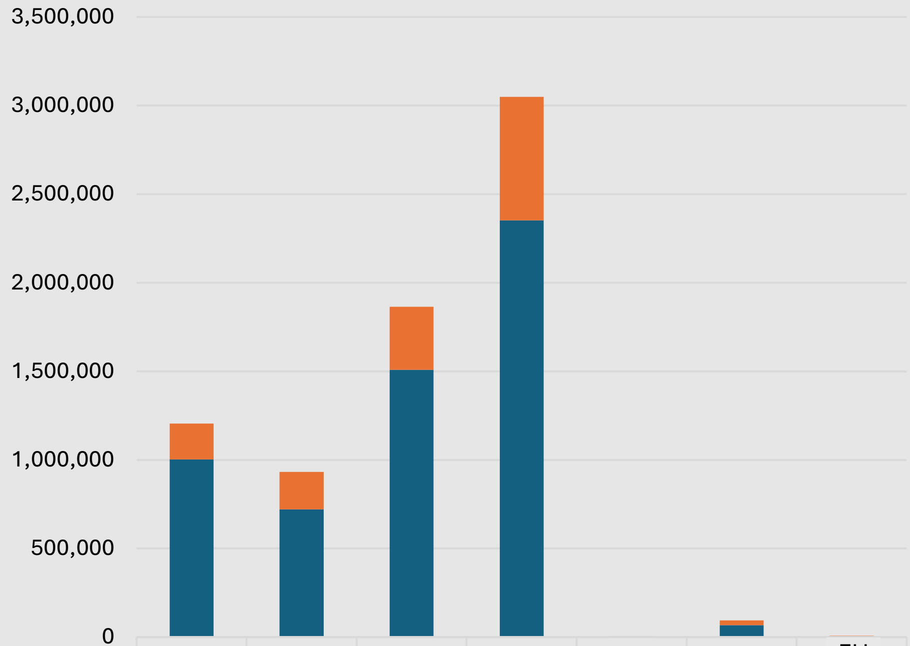
Carbon footprint of tourism in the Canary Islands

The work carried out by Promotur in measuring the carbon footprint of the tourism sector stands as an international benchmark and reflects the destination's concern about emissions contributing to climate change. The carbon footprint generated by tourism in the Canary Islands in 2023 is largely dominated by origin–destination transport emissions, which account for the majority of the environmental impact. In all islands, air traffic is the main source of emissions, far exceeding those generated locally at the destination.

Tenerife, as the island receiving the most tourists, and Gran Canaria report the highest figures. Lanzarote and Fuerteventura also show significant volumes, reflecting their key role in international air connectivity. In contrast, La Palma, La Gomera and El Hierro register much lower total emissions, although the trend of transport emissions outweighing local ones remains consistent across these islands.

This pattern highlights the Canary Islands' dependence on air transport for tourism and the need to explore strategies to reduce its impact. Measures such as optimising flight routes, promoting sustainable aviation fuels, and encouraging longer stays could help mitigate the carbon footprint without compromising tourism activity on the islands.

Total carbon footprint in t CO_2e generated by tourists in the Canary Islands (origin-destination transport + local emissions) in 2023

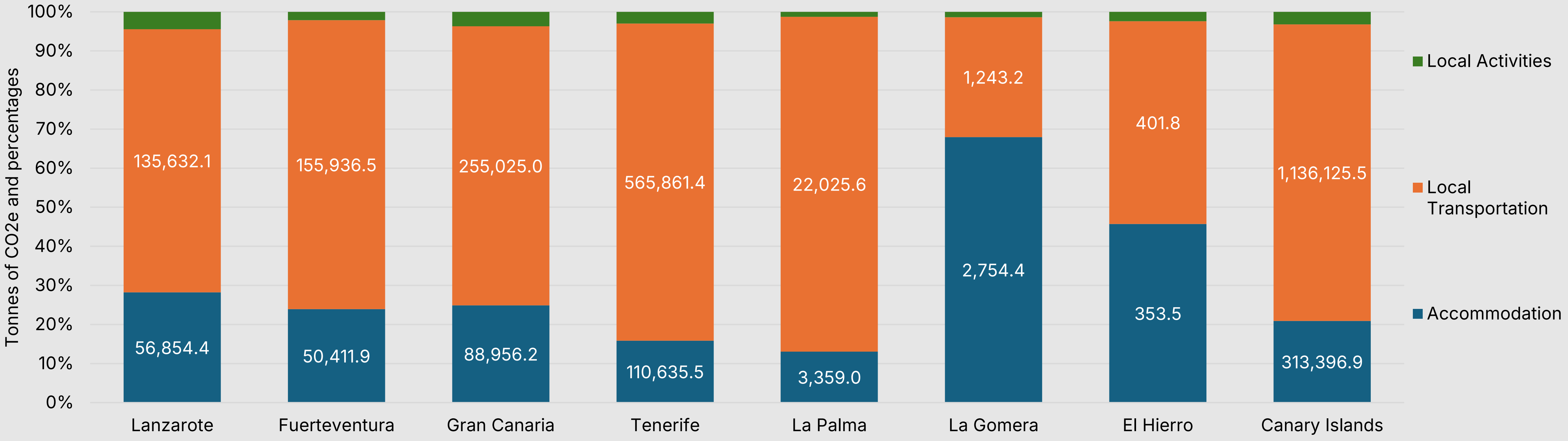


	LZ	FV	GC	TF	LG	LP	EH
Emissions at destination	201,415	210,863	357,239	697,471	4,053	25,712	774
Transport from origin to destination	1,003,401	721,060	1,507,865	2,352,295	2,523	67,860	5,177

Note: Consumption-based accounting. LZ: Lanzarote; FV: Fuerteventura; GC: Gran Canaria; TF: Tenerife, LG: La Gomera; LP: La Palma; EH: El Hierro
Source: Promotur. Estimation of the carbon footprint. Tourism in the Canary Islands. 2023

In almost all the islands, local transport accounts for the largest share of tourism-related carbon emissions. Tenerife and Gran Canaria stand out in particular, reflecting the high volume of internal travel in these destinations with greater tourist influx and population density. Accommodation is also a significant source of emissions, with Tenerife once again generating the highest figures. These data highlight the importance of energy consumption associated with hotel infrastructure and other tourist lodging, especially on islands with higher accommodation capacity. A notable exception is La Gomera, where the carbon footprint from accommodation (2,754.4 tonnes) exceeds that from local transport, unlike the rest of the archipelago. Meanwhile, emissions generated by other local activities are considerably lower.

Distribution of the carbon footprint of destination tourism in t CO2e in 2023

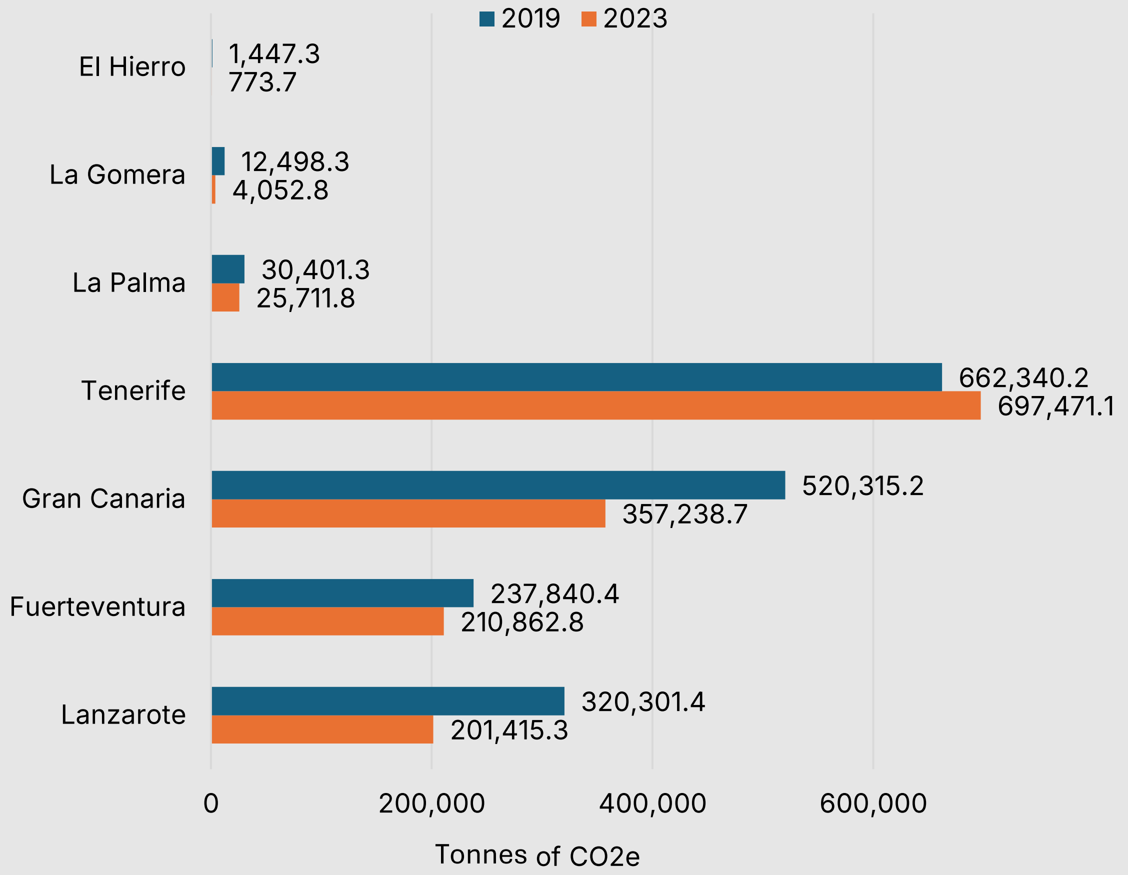


Source: Promotur. Estimation of the carbon footprint. Tourism in the Canary Islands. 2023

According to estimates by Promotur, the evolution of the total tourism carbon footprint in the Canary Islands (measured in t CO_2e) between 2019 and 2023 shows a notable percentage reduction in emissions, with La Gomera registering the sharpest decline at 68%. It is followed by El Hierro, Lanzarote, Gran Canaria, and La Palma, with Fuerteventura recording a more modest reduction of 11%. La Gomera's remarkable drop is explained by its lower reliance on car rental for local transport compared to other islands, and its greater dependence on accommodation-related emissions, which decreased significantly over the period.

In contrast, Tenerife saw a 5.3% increase in emissions. Overall, the Canary Islands recorded a 16% reduction in destination-based emissions over the year. The carbon footprint per tourist at destination decreased by 22% during the same period. In general, the reduction in the tourism carbon footprint across the islands, as estimated by Promotur, is mainly attributed to the accommodation sector.

Comparison of the carbon footprint at destination in tCO2e of tourism in the Canary Islands in 2019 and 2023

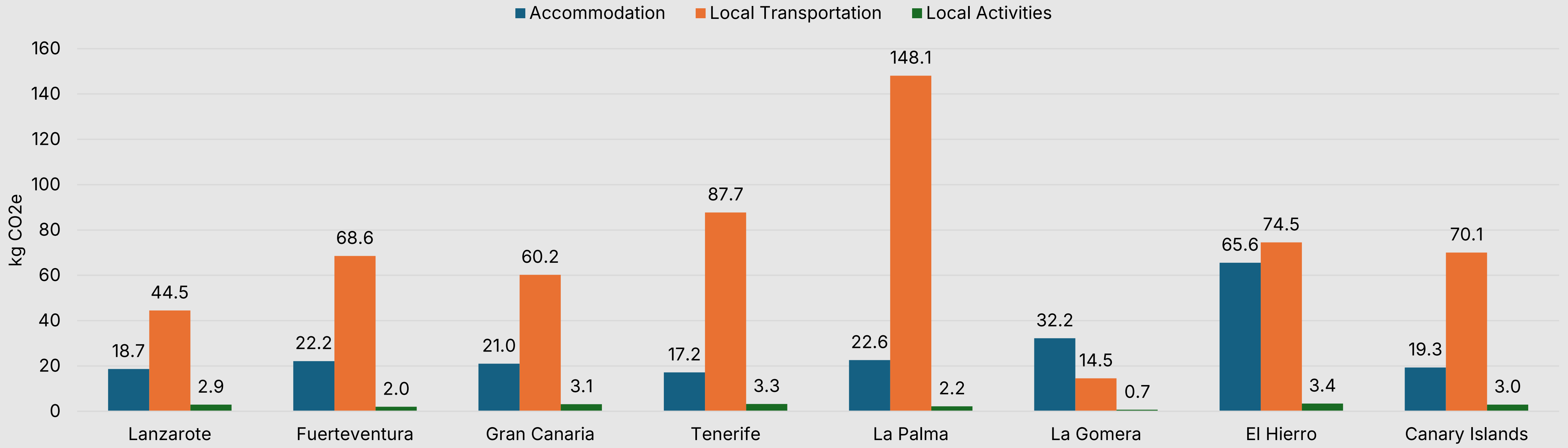


Source: Promotur. Estimation of the carbon footprint. Tourism in the Canary Islands. 2023

The destination-based carbon footprint per tourist in the Canary Islands during 2023 shows that local transport is the main source of emissions in most islands, with a particularly strong impact in La Palma, Tenerife and El Hierro. This indicates that internal travel represents a significant share of tourism's environmental impact in these destinations. It is important to note that rental vehicles account for 79% of emissions related to local transport in the Canary Islands.

Accommodation also plays a relevant role, although to a lesser extent, with notably high emissions per tourist in El Hierro, while in high-volume destinations such as Tenerife and Gran Canaria, emissions per tourist from accommodation remain more moderate. In contrast, other local activities represent only a minimal fraction of the carbon footprint across all islands, when compared to local transport and accommodation.

Destination carbon footprint per tourist in kg CO2e in the Canary Islands in 2023



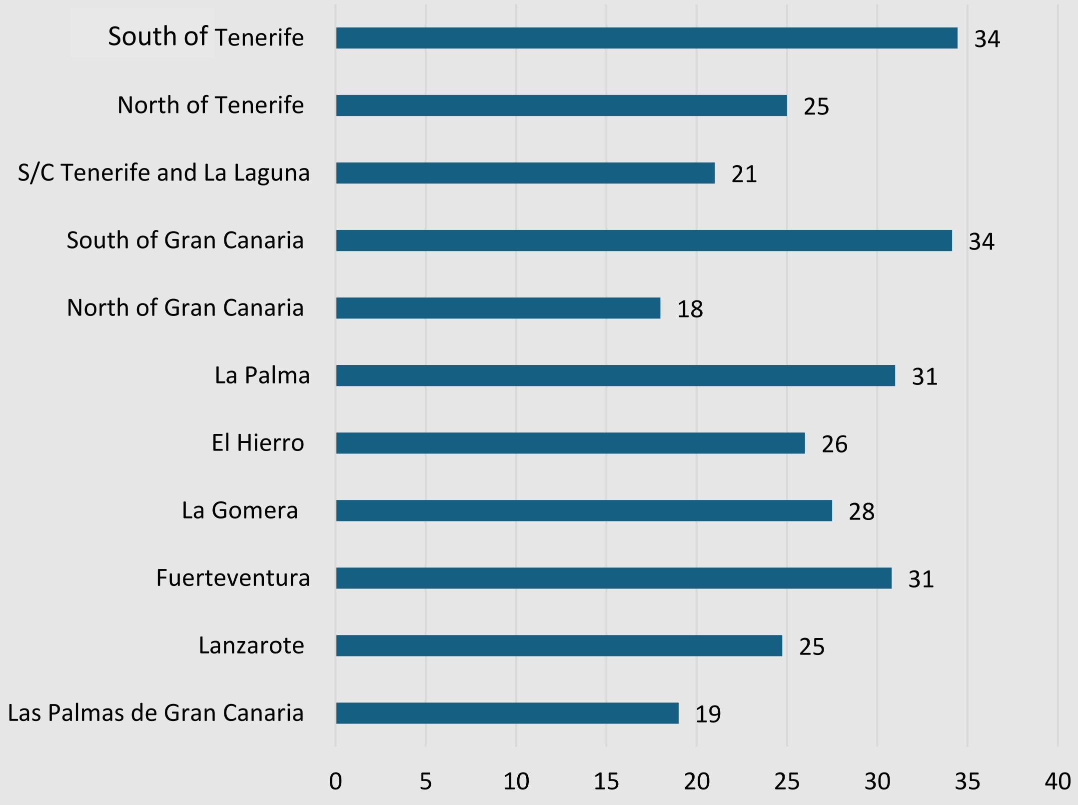
Source: Own elaboration based on estimation of the carbon footprint. Tourism in the Canary Islands. 2023

Episodes of calima

Calima, or the intrusion of African air masses, is a frequent meteorological phenomenon in the Canary Islands, characterised by airborne particles originating from the Sahara Desert. The year 2023, the most recent with complete data, stands out for the frequency of such episodes in the archipelago. Directly attributing the increased frequency of these events to climate change remains challenging and, although there are indications, this link has not been conclusively demonstrated by the scientific community, which remains cautious on the matter.

In 2023, multiple calima episodes were recorded with exceedances of the daily limit values for 2.5ppm and 10ppm particles across all islands, with variations in intensity and frequency depending on geographical location. The most affected areas were southern Tenerife and southern Gran Canaria, with 34 exceedances each, followed by La Palma and Fuerteventura, both with 31 events. La Gomera (28) and El Hierro (26) also showed notable figures, indicating that the western islands are not exempt from these episodes. In contrast, the lowest exceedances were recorded in the metropolitan area of Santa Cruz de Tenerife and La Laguna (21), and in Las Palmas de Gran Canaria (19). These data underscore the importance of monitoring air quality and developing strategies to mitigate the public health impacts of calima, particularly in areas with a higher frequency of events.

Number of intrusions into Saharan air masses (haze) exceeding the daily limit value for airborne particles between 2.5 and 10µm in 2023

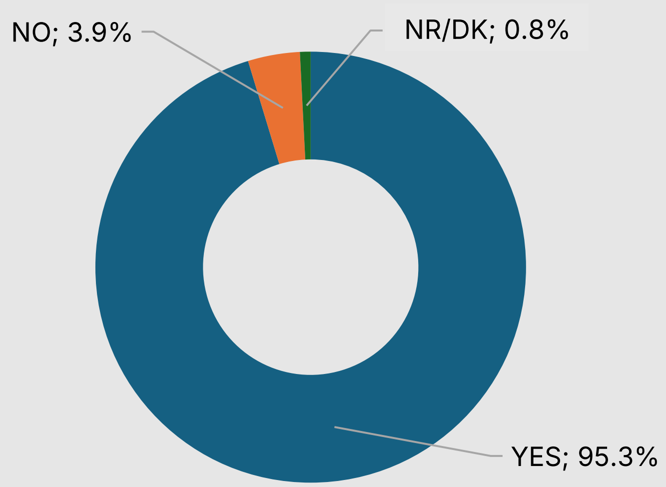


Source: Canary Islands Air Quality Report (2023) – Ministry of Ecological Transition and Energy, Government of the Canary Islands

Perception of climate change

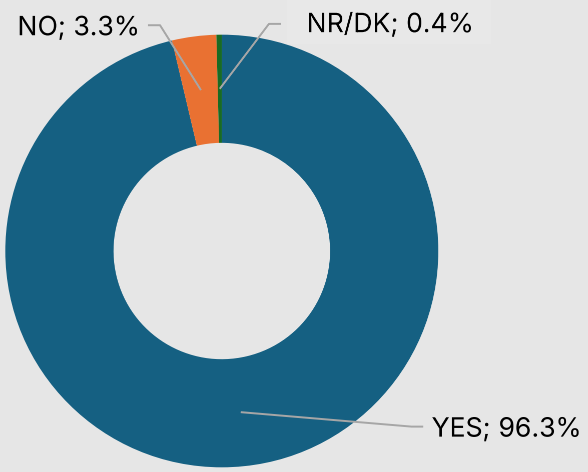
A study on climate change supported by a citizen survey in Tenerife reveals that the vast majority of respondents (96.3%) claim to understand what this phenomenon entails, indicating a high level of environmental awareness on the island. A similar percentage believes that climate change exists. These results suggest that, although awareness of climate change is widespread, small segments of the population still lack knowledge or access to information on the issue. Given the impact of climate change on island territories such as the Canary Islands, characterised by their vulnerability to extreme weather events and climatic variability, these findings highlight the importance of continuing to promote environmental education and scientific outreach. Awareness-raising initiatives can be key to ensuring that the entire population not only understands the concept of climate change, but also recognises its implications and the possible adaptation and mitigation measures.

Do you think climate change exists?



Source: Correa González et al (2023)

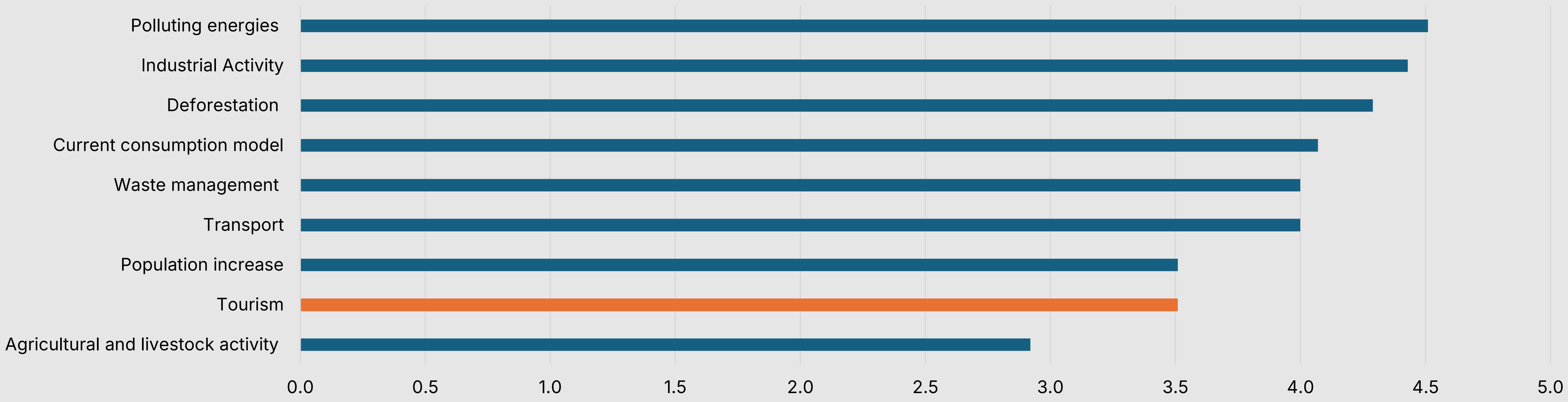
Do you know what climate change is?



Source: Correa González et al (2023)

This study by Correa González (2023) assessed public perception of the contribution of various activities, elements or phenomena to climate change, using a scale from 1 (none) to 5 (high). According to the results, the activities perceived as having the greatest impact (scores above 4) include the use of polluting energy sources (4.5), industrial activities (4.4), deforestation (4.3), and the current consumption model (4.1), which are considered the main contributors to climate change. Activities rated between 3 and 4, such as waste management and transport (4.0), as well as tourism and population growth (3.5), are perceived as medium-to-high contributors. In contrast, agricultural and livestock activities are viewed as having the least impact on climate change.

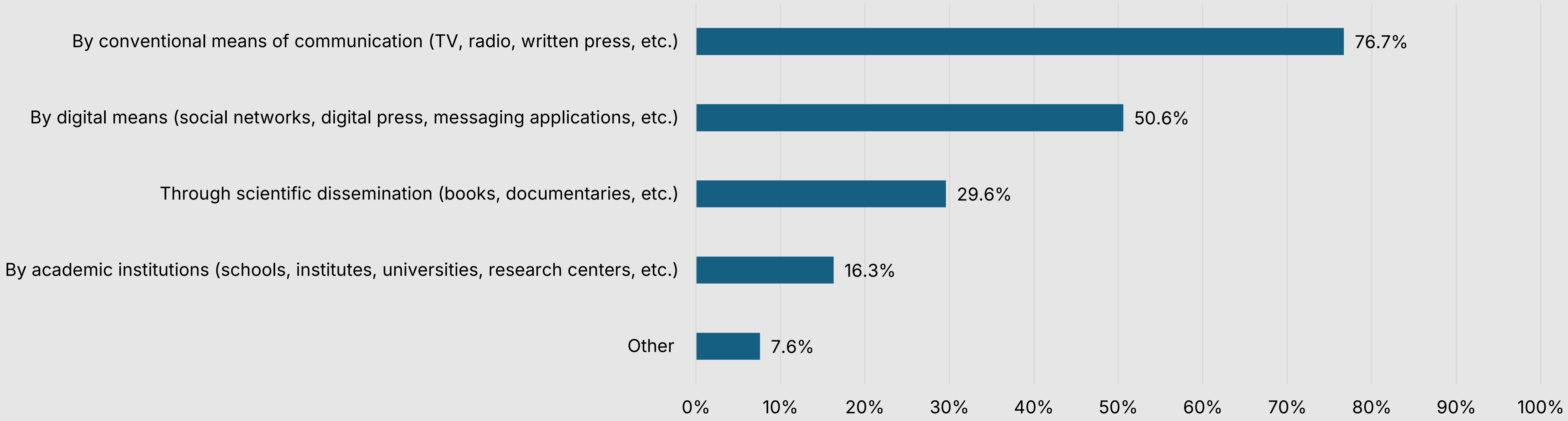
Social perception of the impact of various activities on climate change in Tenerife



Note: The question was: Assess to what extent each of the following activities, elements or phenomena contributes to climate change (1=not at all, 5=a lot). Source: Correa González et al. (2023)

The survey conducted among the population of Tenerife asked about the main channels through which respondents received information on climate change. The results show that conventional media are the most cited source, with 76.7% of respondents identifying them as their primary information channel. Digital media rank second, mentioned by 50.6%, reflecting their growing role in the dissemination of environmental information. Scientific outreach ranks third at 29.6%, followed by academic institutions (schools, high schools, universities, research centres, etc.) with 16.3%, and other sources with 7.6% (Correa González et al., 2023).

Through which channel have you received more information about climate change?

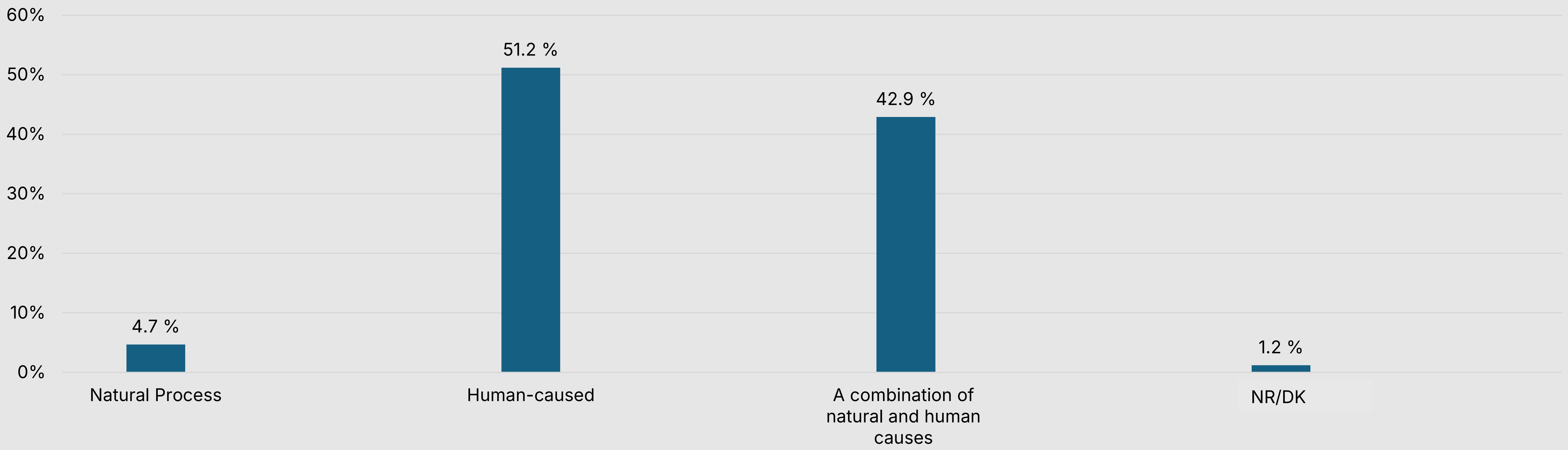


Source: Correa González et al. (2023)

The survey of the population of Tenerife published by Correa González et al. (2023) asked whether climate change is considered a natural process, caused by human activity, or a combination of both. The results indicate that the majority (51.2%) believe it is a phenomenon caused by human activity, reflecting a high level of awareness about its impact on the climate.

Secondly, 42.9% think climate change results from a combination of natural and human causes, showing a more balanced perspective. Lastly, only 4.7% believe it is a natural process, while 1.2% responded "don't know" or did not answer.

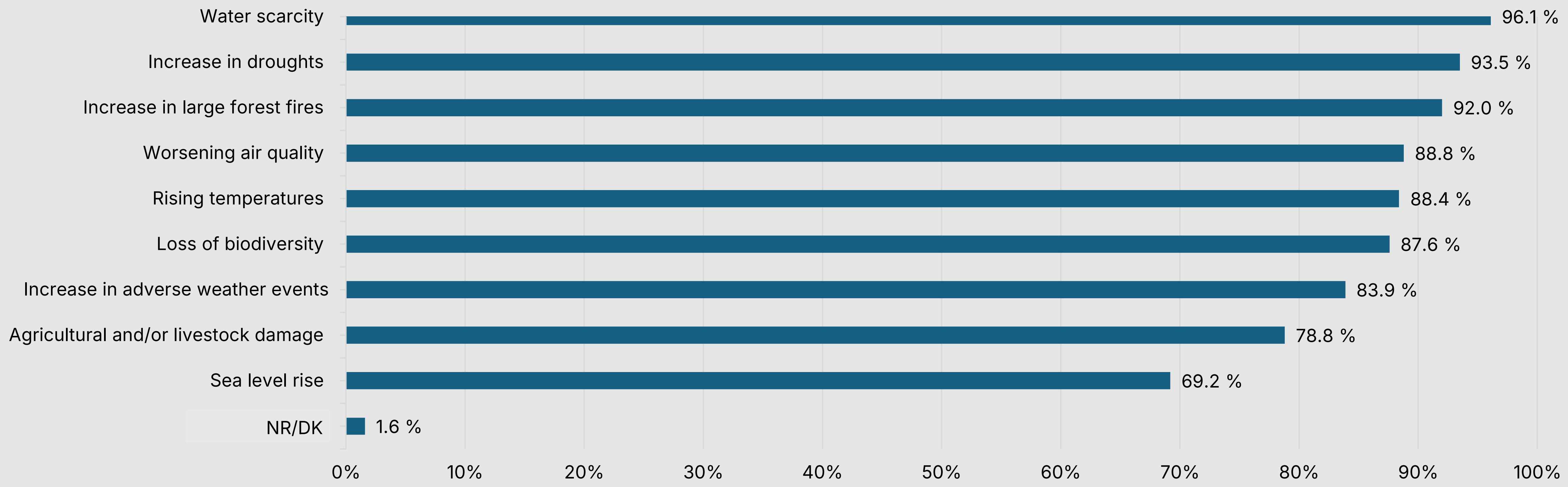
Is climate change a natural, man-made process or a combination of natural and human causes?



Source: Correa González et al. (2023)

The main risks perceived in relation to climate change were water scarcity (96.1%), an increase in droughts (93.5%), and the rise in large wildfires (92%). Additionally, between 83.9% and 88.8% of respondents highlighted other risks such as worsening air quality, rising temperatures, biodiversity loss, and the increase in extreme weather events. Significant concerns were also expressed regarding damage to agriculture and livestock (78.8%) and sea level rise (69.2%). (Correa González et al., 2023).

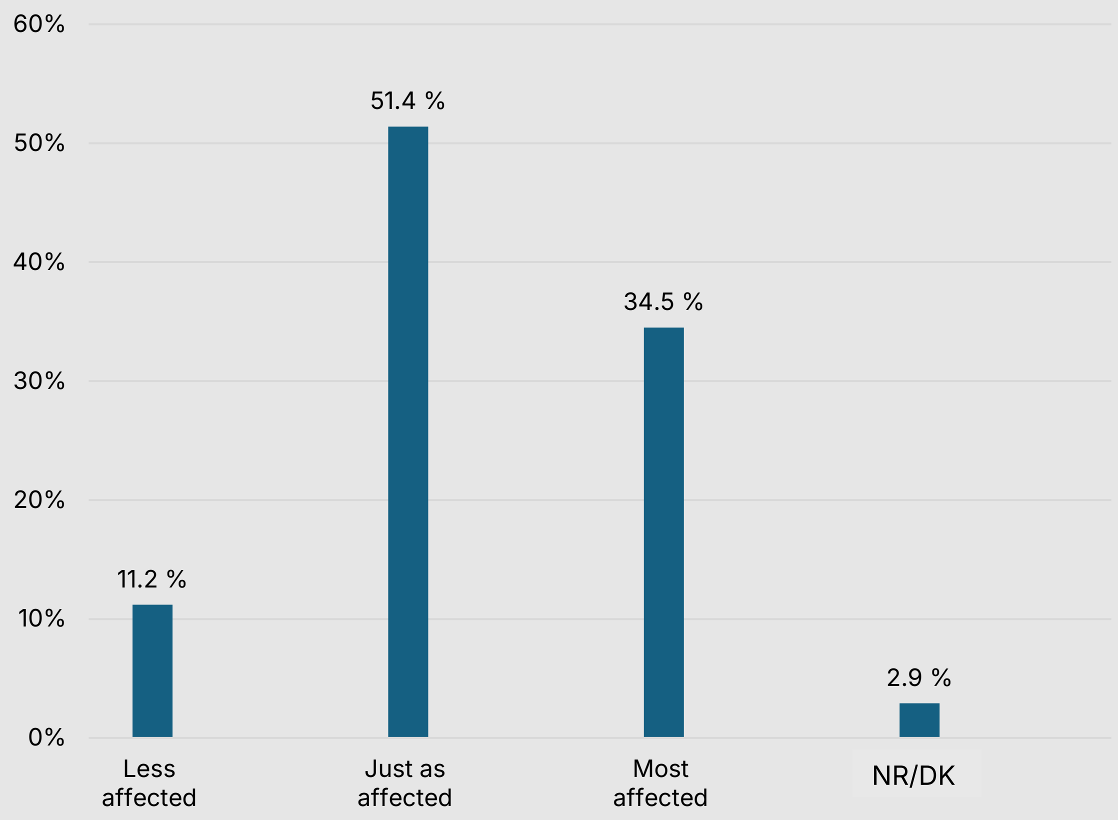
What are the most serious risks facing the Canary Islands in relation to climate change?



Source: Correa González et al. (2023)

Among respondents in Tenerife, 51.4% believe that the effects of climate change in the Canary Islands will be similar to those in other regions, while 34.5% consider that the Canary Islands will be more affected, and 11.2% think they will be less affected. A further 2.9% did not know or did not answer. These findings suggest that, although the prevailing view is that the Canary Islands will face the effects of climate change to a similar extent as other territories, a significant portion of the population considers the islands to be more vulnerable (Correa González et al., 2023).

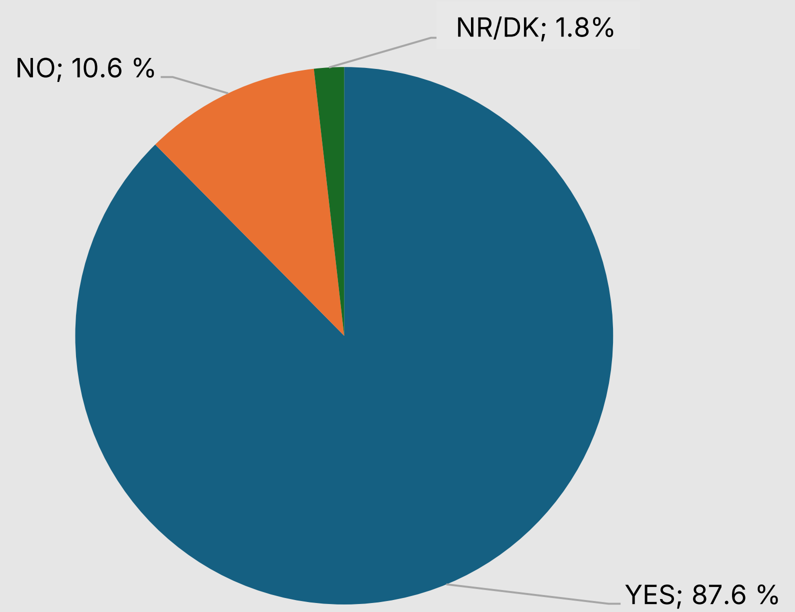
Perception of the differential impact of climate change in the Canary Islands compared to other autonomous communities



Note: The question was: Do you think that the Canary Islands will be more, less or equally affected by the effects of climate change than other territories of the State? Source: Correa González et al. (2023)

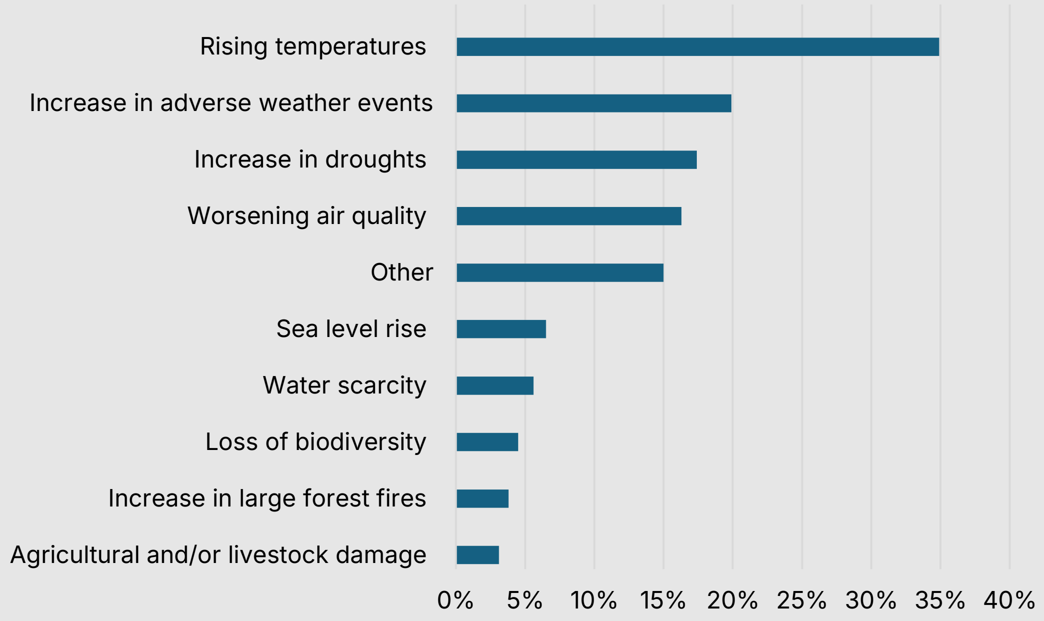
87.6% of respondents believe that climate change is already having effects on the island, while 10.6% think it is not affecting it and 1.8% did not know or did not answer. Those who did perceive its effects were asked to identify them. The main impacts cited were rising temperatures (34.9%), an increase in extreme weather events (19.9%), more frequent droughts (17.4%), and worsening air quality (16.3%). Additionally, 15% mentioned other types of effects. To a lesser extent, respondents also identified impacts such as sea level rise (6.5%), water scarcity (5.6%), biodiversity loss (4.5%), an increase in large wildfires (3.8%), and damage to agriculture and livestock (3.1%) (Correa González et al., 2023).

Do you perceive any effects of climate change?



Source: Correa González et al. (2023)

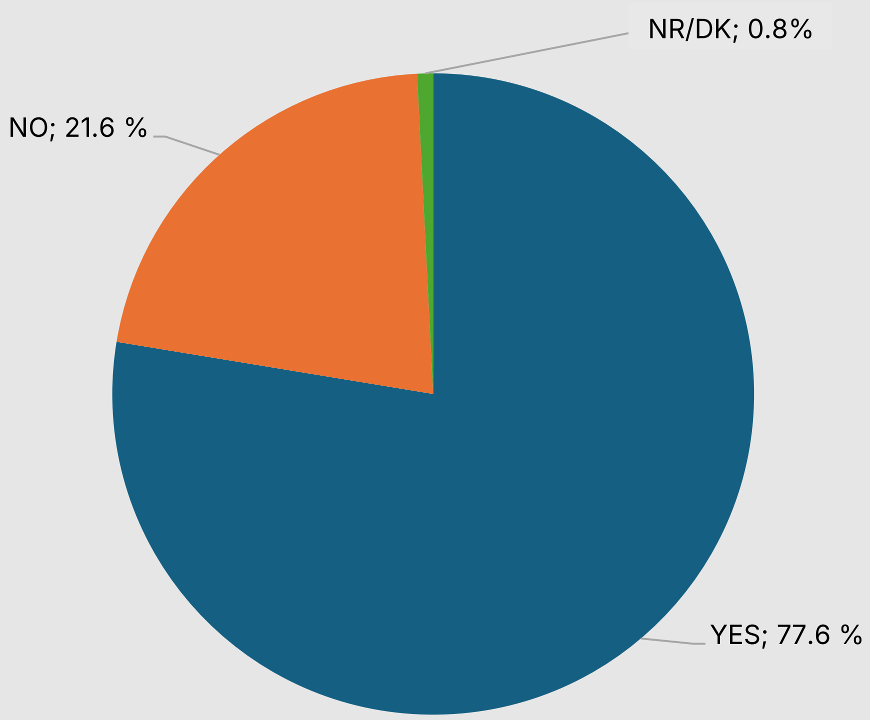
Having answered that you perceive any effects of climate change, could you indicate which one?



Source: Correa González et al. (2023)

The willingness to change one's lifestyle to mitigate the effects of climate change is widespread among the surveyed population, with 77.6% stating they would be willing to make changes. This result reflects a high level of awareness regarding the need to adopt more sustainable habits to reduce environmental impact. However, 21.6% of respondents are not willing to change their lifestyle, which may be linked to economic barriers, lack of information, or scepticism about the impact of individual actions in tackling climate change. These findings underscore the importance of public policies and awareness-raising strategies that support the transition towards more sustainable ways of living.

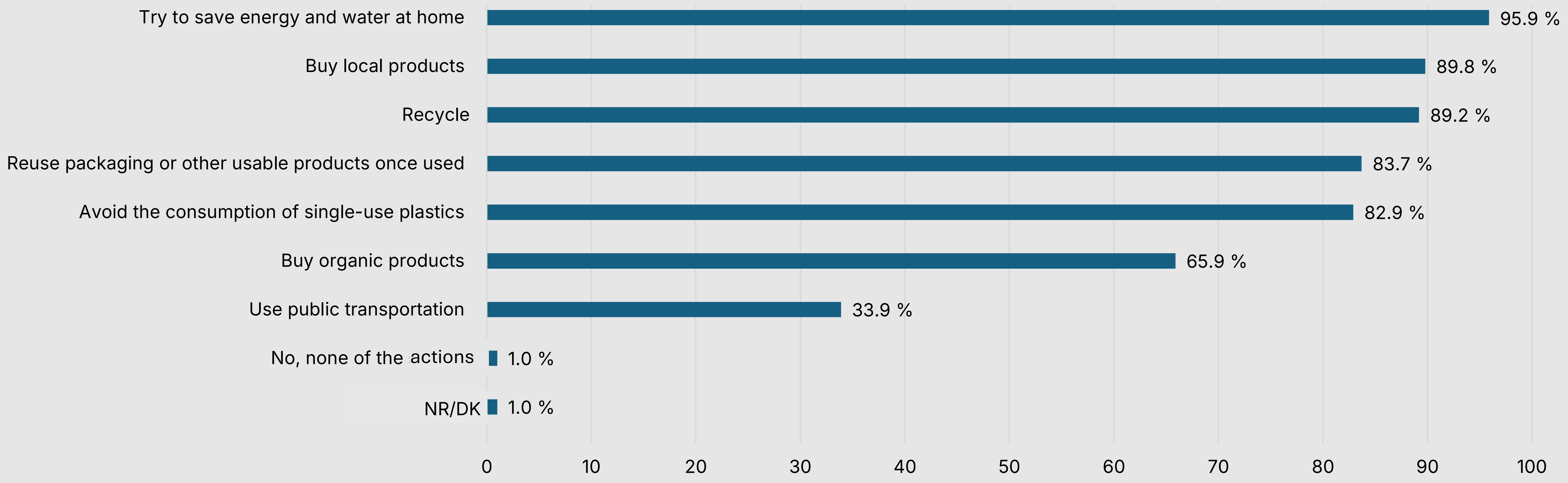
Would you be willing to modify your way of life to mitigate the effects of climate change?



Source: Correa González et al. (2023)

The survey data reflect a high level of environmental commitment in the daily lives of respondents. The most frequent action is saving energy and water at home, with 95.9% adherence, followed by the purchase of locally sourced products (89.8%) and recycling (89.2%), indicating strong awareness of responsible consumption. Also notable are the reuse of containers (83.7%) and the reduction of single-use plastics (82.9%), highlighting the importance of waste minimisation. However, public transport use is the least adopted action, at just 33.9%, suggesting potential barriers such as inadequate infrastructure or limited adoption of sustainable mobility habits. Additionally, 65.9% report purchasing organic products, reflecting a growing preference for more sustainable alternatives.

Do you frequently do the following in your daily life?



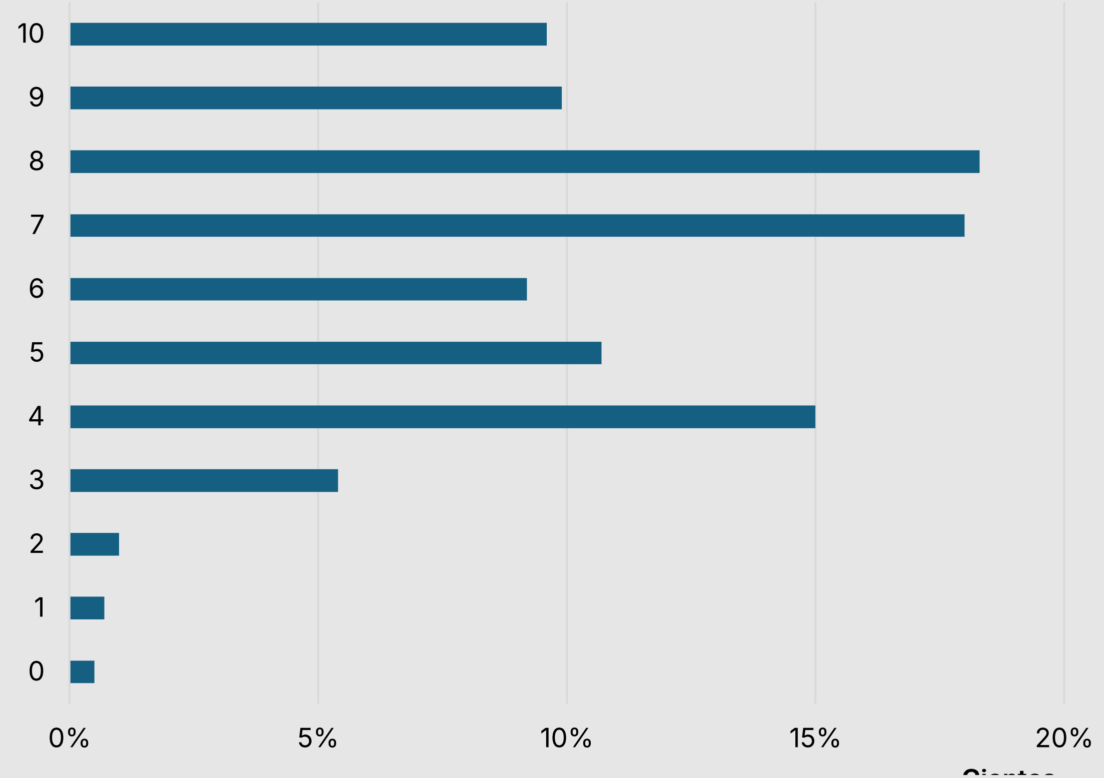
Source: Correa González et al. (2023)

Perception of climate change

According to data from the Canary Islands Sociobarometer, conducted by UNED Gran Canaria, the archipelago's population shows a high level of conviction regarding the existence of climate change. On a scale from 0 to 10, the most frequent score is 8, with 18.3% of responses, closely followed by 7, with 18%. These results reflect a significant level of social consensus on the reality of the phenomenon. However, the study also highlights that a notable segment of the population expresses a lower degree of conviction, with score 4 accounting for 15% of responses.

These findings are crucial for analysing the impact of tourism on the environmental sustainability of the Canary Islands, as they reflect public perception of the issue and may influence the acceptance of public policies aimed at mitigating tourism's effects on climate change. The high level of awareness among the population supports the need to advance strategies to reduce the tourism sector's carbon footprint, promoting measures such as the decarbonisation of transport, energy efficiency in accommodation, and diversification of the tourism offer towards more sustainable models.

Degree of conviction regarding the existence of climate change in the Canary Islands (scale from 0 to 10)

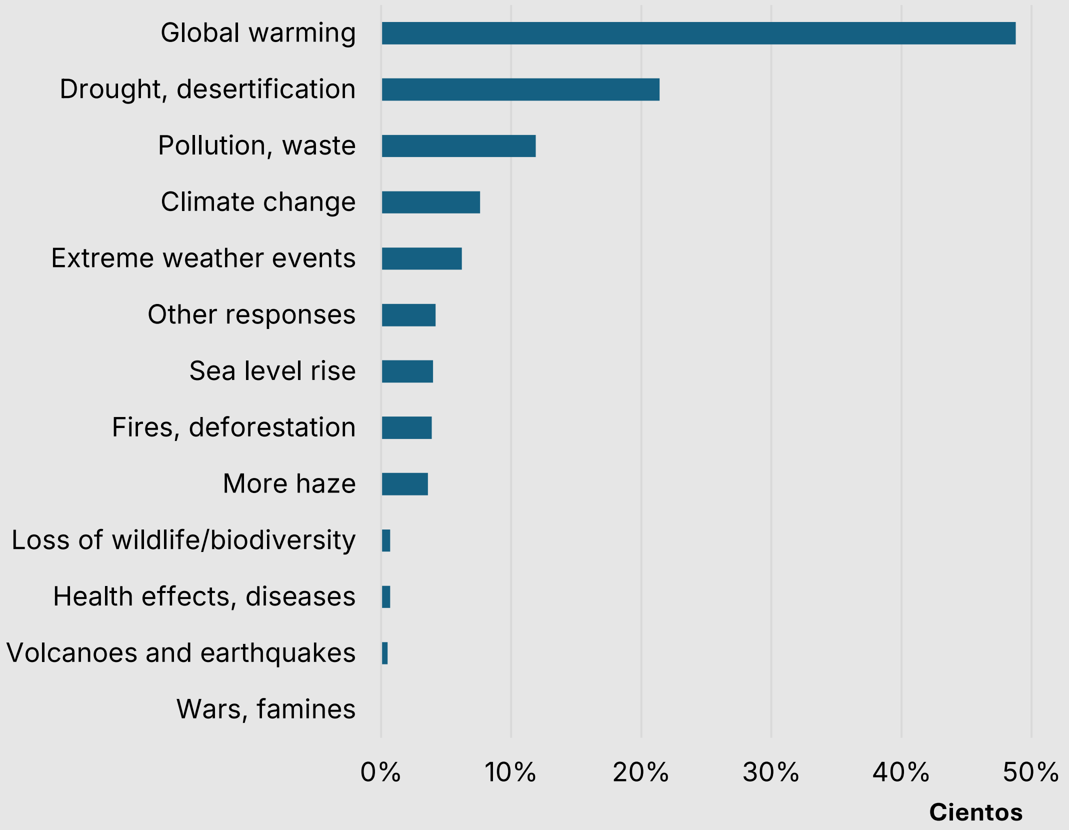


Note: there is no data for 2024. Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria Fieldwork carried out in October 2023

Perceptions of climate change in the Canary Islands are mainly shaped by its association with global warming, identified by 48.4% of the population. Drought and desertification, mentioned by 21.4% of respondents, underscore concerns over water resource availability in the archipelago. Other effects identified include pollution, extreme weather events, and to a lesser extent, sea level rise, wildfires, and calima, the latter mentioned by just 3.6%.

These findings reflect growing awareness of climate change impacts and their connection to the islands' natural environment. In the tourism context, rising temperatures and reduced water resources may compromise the sector's sustainability and affect visitor experience. Planning must therefore focus on adaptation strategies to mitigate these effects and ensure the destination's resilience to ongoing environmental changes.

Perception of how they have noticed the existence of climate change (three answers to choose from)

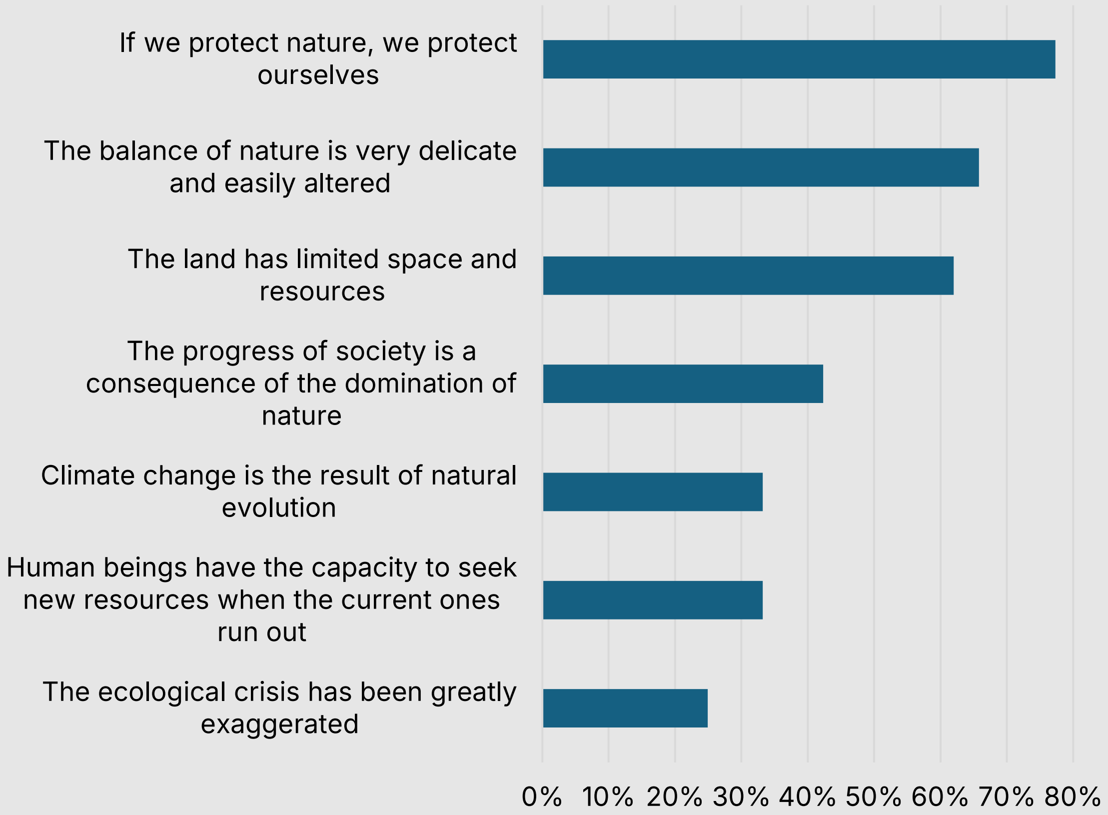


Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria Fieldwork carried out in October 2023

The data reflect a high level of environmental awareness among the Canarian population, reinforcing the potential for strong public support for the integration of sustainability measures both within and beyond the tourism sector. The strong perceived link between nature conservation and human well-being, endorsed by 77.3% of respondents, suggests significant social backing for policies aimed at reducing tourism's impact on local ecosystems.

Recognition of the fragility of natural balance and awareness of planetary boundaries also indicate that the population is receptive to sustainable management strategies, such as optimising resource use and reducing emissions in the tourism sector. However, the persistence of opinions that downplay the climate crisis poses challenges for the implementation of prevention, mitigation, and adaptation policies.

Degree of agreement with the following statements about climate change

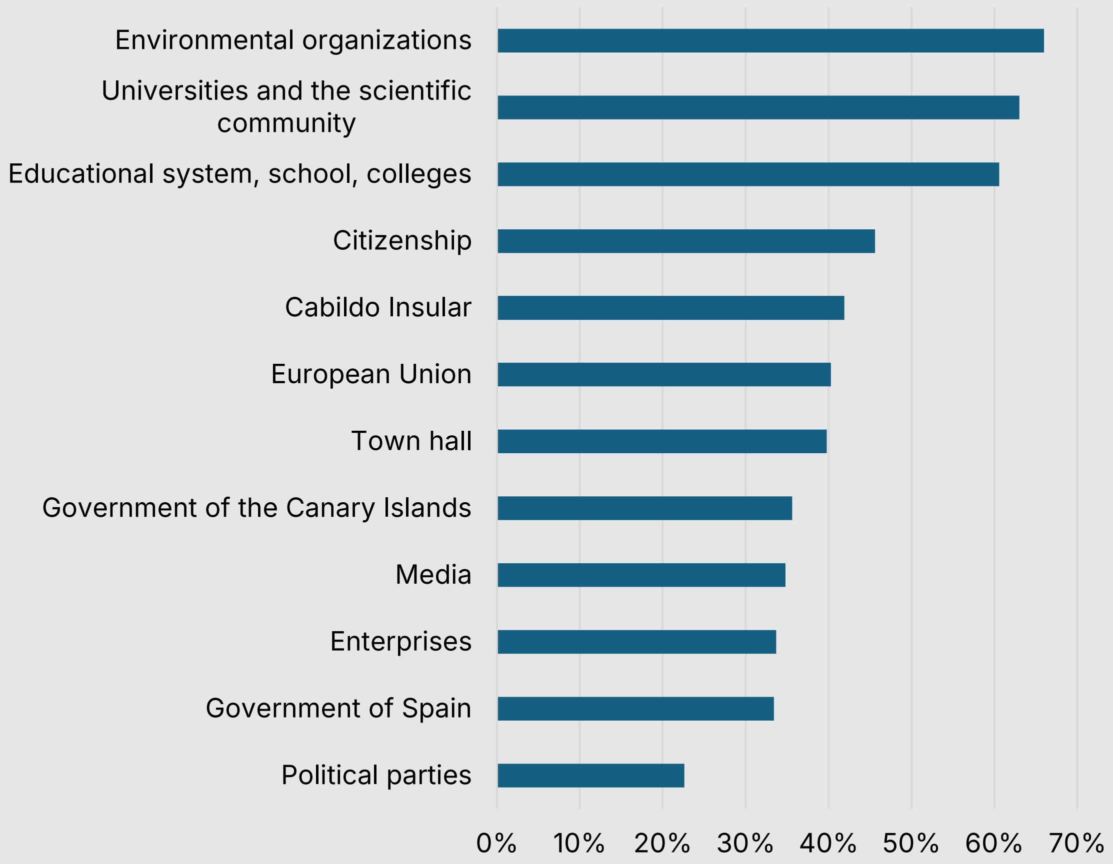


Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria. Fieldwork in October 2023

The high level of trust in environmental organisations, the scientific community, and the education system reinforces the importance of knowledge and research in addressing climate change. These results support the need to integrate science into decision-making and to design evidence-based policies for tourism sustainability in the Canary Islands.

The fact that citizens also show a significant level of trust highlights recognition of society's role in the ecological transition. However, lower levels of trust in public administrations and businesses point to a perceived lack of institutional response. This underscores the need for greater transparency, commitment, and public participation in the implementation of mitigation and adaptation strategies in the tourism sector.

Degree of confidence in the actions of institutions to address climate change and environmental problems



Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria Fieldwork carried out in October 2023

Meteorological ephemeris

In recent years, particularly in 2023, the Canary Islands have seen a notable increase in meteorological milestones, understood as unusual events in the region's historical climate records, indicating a clear warming trend across the archipelago. Record-breaking annual average temperatures exceeding previous highs appear to demonstrate the effects of climate change in the region, with direct implications for tourism sustainability. Rising average temperatures may impact water resource availability, increase the frequency and intensity of extreme events such as heatwaves, and alter the natural ecosystems that contribute to the archipelago's tourist appeal. This upward temperature trend highlights the need to adapt tourism infrastructure to mitigate environmental impact and reduce vulnerability to climate change. This entails promoting energy efficiency, the use of renewable energy, optimising water consumption, and developing tourism models that are less dependent on high-impact activities.

Highest annual temperature ephemeris in 2023 and 2024

Ephemerides	Weather station	Average (°C)	Previous ephemeris		Difference (°C)	Data from
			°C	Year		
2023	GRAN CANARIA AIRPORT	22.7	22.3	1998	0.4	1951
	LANZAROTE AIRPORT	22.7	22.4	2010	0.3	1974
	EL HIERRO AIRPORT	22.7	22.0	2017	0.7	1974
	LA PALMA AIRPORT	21.9	21.6	2001	0.3	1971
	STA. CRUZ DE TENERIFE	23.2	22.7	1998	0.5	1920
	LOS RODEOS, TENERIFE	18.6	18.1	2020	0.5	1944
	TENERIFE SOUTH	23.1	22.5	2017	0.6	1981
2024	IZAÑA, TENERIFE	12.1	11.6	2017	0.5	1920

Source: AEMET climate report (2023) and AEMET climate report (2024)

Data show a rise in annual average maximum temperatures in the Canary Islands, with new records set at various weather stations in 2023 and 2024. This increase in maximum temperatures appears to be a manifestation of climate change and its impact on the archipelago's climate, marked by progressive warming affecting both coastal areas and high-altitude zones, such as Izaña. The rise in annual average maximum temperatures poses several risks, including increased pressure on water resources, higher energy demand for cooling, and potential disruption of natural ecosystems that are essential for nature-based tourism in the archipelago. The tourism sector in the Canary Islands must adapt to these changes through measures that reduce environmental impact and strengthen the destination's resilience to global warming. The fact that many of these records surpass relatively recent highs indicates that the pace of warming is accelerating, and that climate factors must be integrated into long-term tourism planning to ensure the sector's sustainability and future viability in an increasingly climate-affected context.

Annual average temperature ephemeris of the highest maximums in 2023 and 2024

Ephemerides	Weather station	Maximum average (°C)	Previous ephemeris		Difference (°C)	Data from
			°C	Year		
2023	GRAN CANARIA AIRPORT	25.9	25.4	1998	0.5	1951
	LANZAROTE AIRPORT	27.0	26.5	2022	0.5	1974
	EL HIERRO AIRPORT	24.8	24.2	2003	0.6	1974
	STA. CRUZ DE TENERIFE	26.3	25.8	1998	0.5	1920
	LOS RODEOS, TENERIFE	22.4	21.9	2020	0.5	1944
	TENERIFE SOUTH	27.2	26.4	2017	0.8	1981
2024	IZAÑA, TENERIFE	16.2	15.5	2017	0.7	1920

Recent climate records reflect a clear trend of rising temperatures and decreasing precipitation in the Canary Islands, reinforcing evidence of climate change impacts. The daily maximum temperature recorded at El Hierro Airport in 2024, reaching 35.4°C, exceeded the previous 1983 record by 1.2°C. Such events have significant implications for health, biodiversity, and the tourism sector, particularly in a destination where climatic comfort is a key attraction. On the other hand, the decline in annual rainfall at stations such as Lanzarote Airport and Tenerife North indicates a worrying trend towards increased aridity. In Los Rodeos, annual precipitation in 2024 fell by 16.8 mm compared to the previous record, set just a year earlier. These changes highlight the urgent need to strengthen strategies for water management, adapt the tourism model to reduce environmental impact, and implement infrastructure resilient to extreme temperatures and longer drought periods.

Daily maximum temperature ephemeris recorded in 2023 and 2024

Ephemerides	Weather station	Maximum		Previous ephemeris		Difference (°C)	Data from
		°C	Day	°C	Date		
2023	EL HIERRO AIRPORT	35.4	10/10/2023	34.2	16/10/1983	1.2	1973

Lowest annual precipitation ephemeris recorded in 2023 and 2024

Ephemerides	Weather station	Precipitation (mm)	Previous ephemeris		Difference (mm)	Data from
			mm	Year		
2023	LANZAROTE AIRPORT	39.5	42.8	2001	-3.3	1973
	LOS RODEOS, TENERIFE	287.6	298.7	2017	-11.1	1945
2024	LOS RODEOS, TENERIFE	270.8	287.6	2023	-16.8	1945

Climate change and mitigation

Indicator	Description	Availability	Source	Remarks
Total greenhouse gas emissions	Tonnes of CO2 equivalent of total gases.	Partially available	Energy Yearbook of the Canary Islands. Ministry of Ecological Transition, Fight against Climate Change and Territorial Planning, Government of the Canary Islands	There is a need for regular data on greenhouse gas emissions from activities characteristic of tourism.
Carbon footprint per tourist and tourist activities		Available occasionally	Government of the Canary Islands	
Risk of climate change (particularly in sensitive areas for tourism activity)		Available	PIMA Adapta Costa / GOTA ULL	
Greenhouse gas emissions per capita	Tonnes of CO2 equivalent of total gases / Population.	Partially available	Energy Yearbook of the Canary Islands. Ministry of Ecological Transition, Fight against Climate Change and Territorial Planning, Government of the Canary Islands	
Share of greenhouse gas emissions by economic sector	Tonnes of CO2 equivalent emissions by economic sector / Total greenhouse gas emissions.	Partially available	Energy Yearbook of the Canary Islands. Ministry of Ecological Transition, Fight against Climate Change and Territorial Planning, Government of the Canary Islands	

4.12

Local satisfaction with tourism and local well-being

Introduction

The current context gives particular relevance to the analysis of local population satisfaction with tourism and its impact on well-being. The Canary Islands' leading position in tourism and record economic figures contrast with objective indicators of quality of life, which consistently place the archipelago among the lowest-ranked Spanish autonomous communities. This disconnect between tourism success and the socio-economic reality has fuelled a growing debate within Canarian society regarding the effects of the tourism model, reaching a peak in 2024 with public protests and demonstrations. The media coverage of these events in source markets has highlighted the importance of social perception of tourism as a key axis for the destination's sustainability.

Fortunately, detailed information is available to analyse the evolution of public perception of tourism and its impact on daily life. While the majority of the population continues to recognise the central role of the sector in the economy and employment, the data show a notable decline in the perceived benefits of tourism. At the same time, the number of people who perceive more costs than benefits from its development has increased, particularly in relation to housing availability and prices, the cost of living, and environmental conservation.
The economic dependence on tourism remains a key factor in the social perception of the sector, although there are significant differences between islands and municipalities. Perceived dependence is much higher in areas with greater tourism specialisation, such as Fuerteventura and Lanzarote, where up to 48 percent of households depend economically on tourism. Meanwhile, the negative impacts of tourism are gaining greater prominence in the public debate. More than half of the population believes that tourism contributes to rising housing prices, an overall increase in the cost of living, and is causing unwanted residential displacement due to pressure on the housing market. In addition, concerns persist regarding precarious employment conditions in the sector.

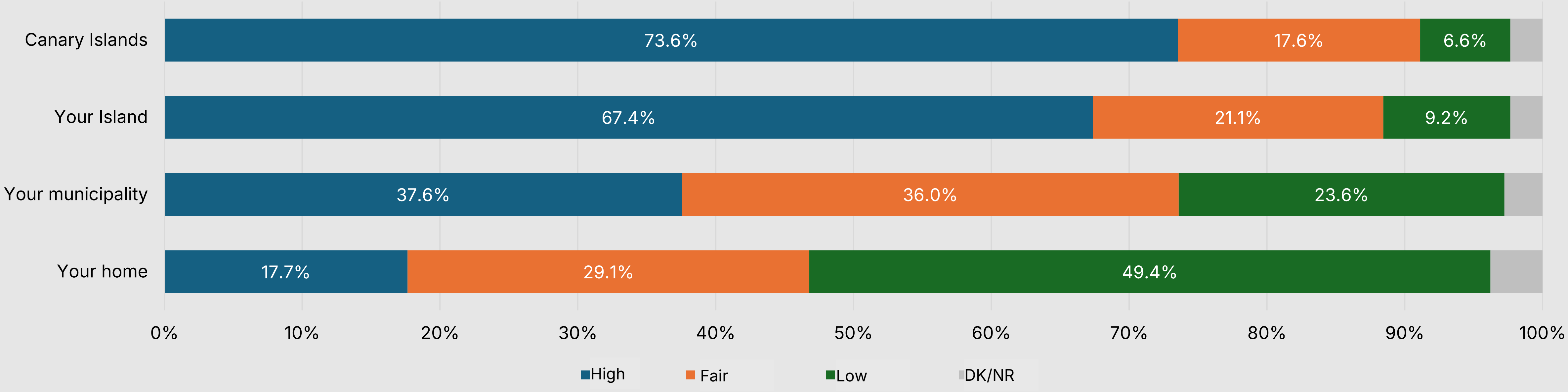
In conclusion, the relationship between tourism and well-being in the Canary Islands has reached a turning point. Although tourism continues to be widely recognised as a key economic pillar, growing social discontent and the perception of its negative impacts have prompted a re-evaluation of its long-term sustainability. Managing these challenges will be essential to ensure that tourism development not only generates wealth, but also contributes to improving the quality of life for the residents of the archipelago.

Economic dependence on tourism

There is a stronger perception of economic dependence on tourism depending on the territorial scale about which the respondent is asked. While 73.6 percent of the population state that the Canary Islands depend heavily on tourism, 67.4 percent believe their island is highly dependent, but only 37.6 percent say that their own municipality relies heavily on this activity.

It is also worth noting that 17.7 percent of respondents say their household depends heavily on tourism. When adding those who indicate a moderate level of dependence, it emerges that approximately half of the Canarian population considers their household to be either strongly or moderately dependent on tourism.

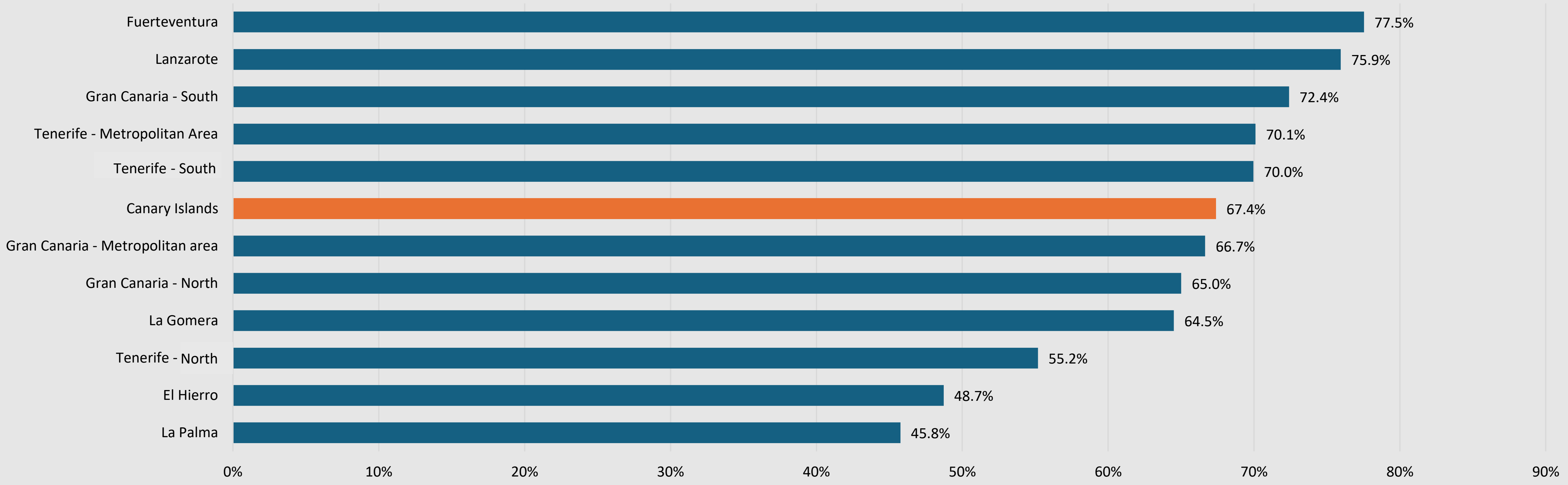
Population's assessment of economic dependence on tourism (%) in 2024



Note: The "High" and "Low" categories correspond to the sum of the responses "Very High" and "High", and "Low" and "Very Low", respectively. Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

The perception of economic dependence on tourism in the Canary Islands is closely linked to the most tourism-intensive areas. In Fuerteventura and Lanzarote, the population perceives their island's economic dependence on tourism as high or very high, with figures approximately ten percentage points above the regional average. In contrast, El Hierro and La Palma are the islands where residents perceive the lowest levels of dependence on tourism.

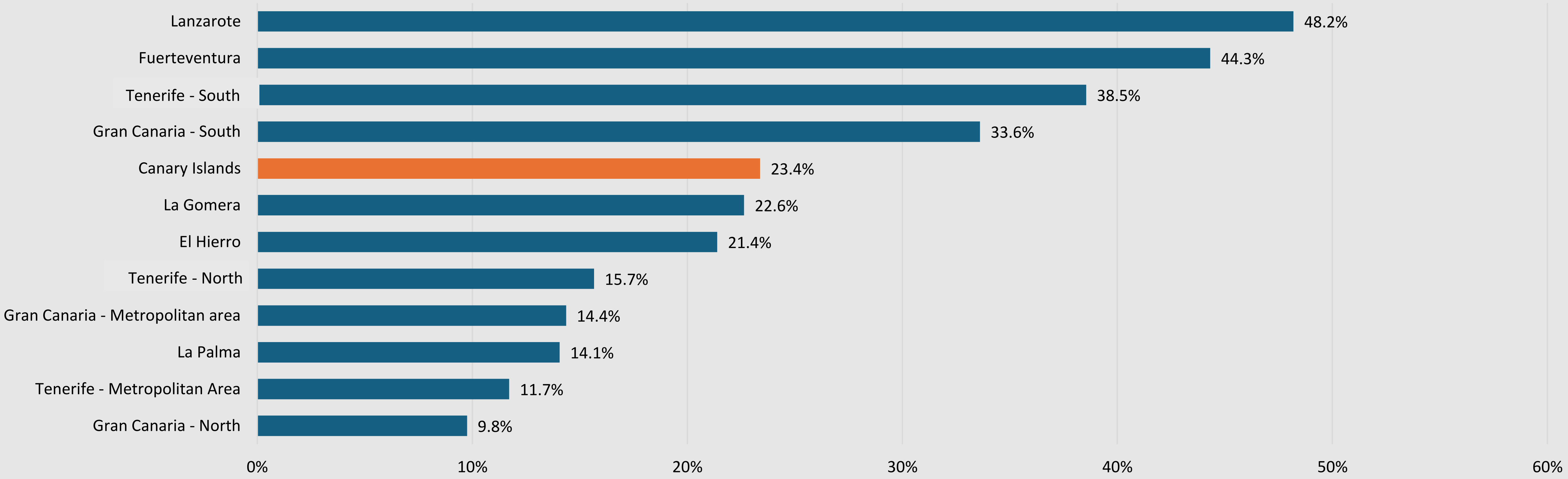
Perception of high or very high economic dependence on tourism on your island of residence in 2024



Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

The share of the population stating that their household depends heavily on tourism is unevenly distributed across the archipelago, reflecting the uneven distribution of tourism activity itself. In Lanzarote and Fuerteventura, the figures stand at 48 percent and 44% respectively, while in the south of Tenerife and Gran Canaria they are 39% and 34%. In the rest of the archipelago, these percentages are considerably lower.

Perception of high or very high economic dependence on tourism in your household in 2024

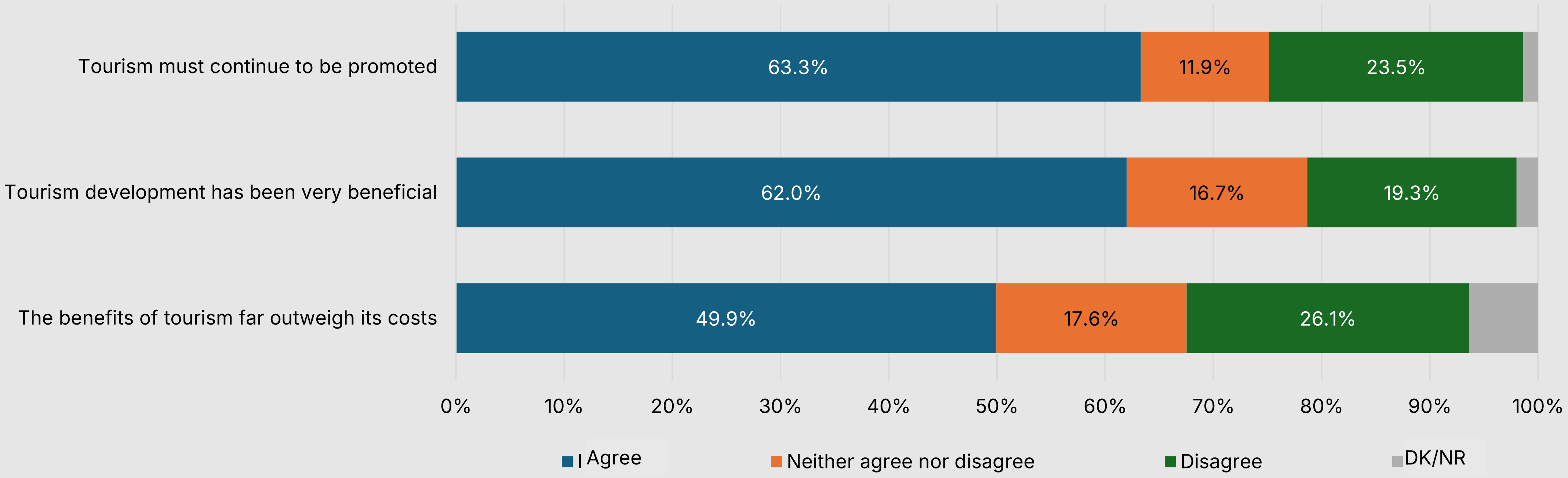


Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Perception of tourist activity

There is a positive perception of the benefits that tourism brings to the archipelago and a general agreement on the need to continue promoting it. However, it is important to note that slightly more than one quarter of the surveyed population believe that the costs of tourism outweigh the benefits, while 17.6 % have no clear opinion on the matter.

Population's assessment of tourist activity on their island of residence (%): second quarter 2024. Canary Islands



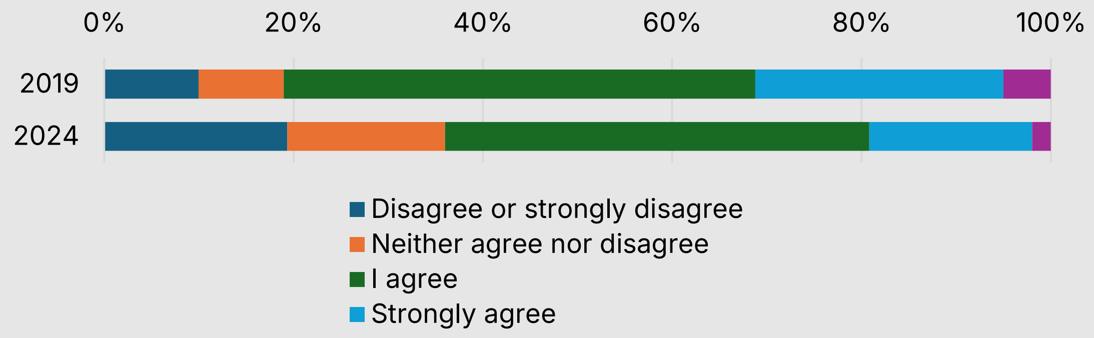
Note: The categories "Agree" and "Disagree" correspond to the sum of the responses "Strongly agree" and "Agree", and "Disagree" and "Strongly disagree", respectively. Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Based on perceptions that are comparable with data from the same source in 2019, there has been a significant decline in support for tourism in 2024, both in terms of the perceived benefits it brings to the island (from 76 % to 62 %) and support for further promotion (from 80.5 % to 63.3 %). The share of people who are critical of tourism (disagree or strongly disagree) has doubled over this period, now standing at around 20 % of the population.

This shift is observed across all islands, although with varying intensity. It is most pronounced in Tenerife and Gran Canaria, where the proportion of those who believe tourism should continue to be promoted has dropped by 18.5 and 16.4 percentage points respectively (see next page).

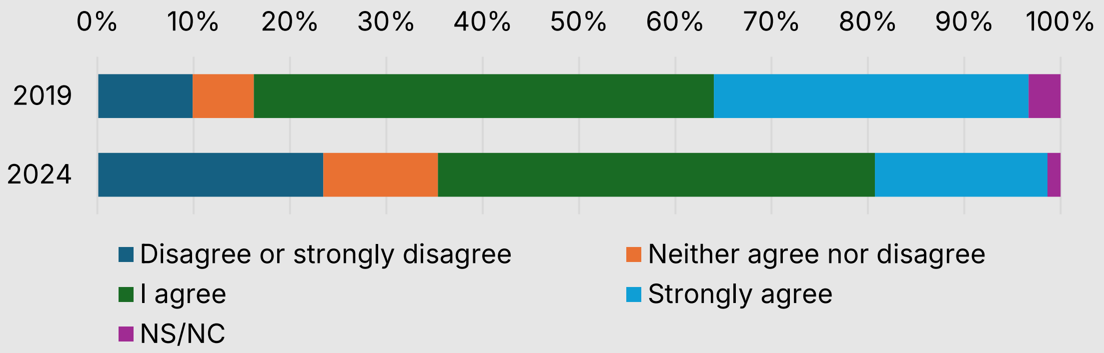
As will be shown later, this change may be linked to the increasingly widespread perception among the population that tourism development is having a negative impact on housing availability.

Tourism development has been very beneficial for the island and its inhabitants



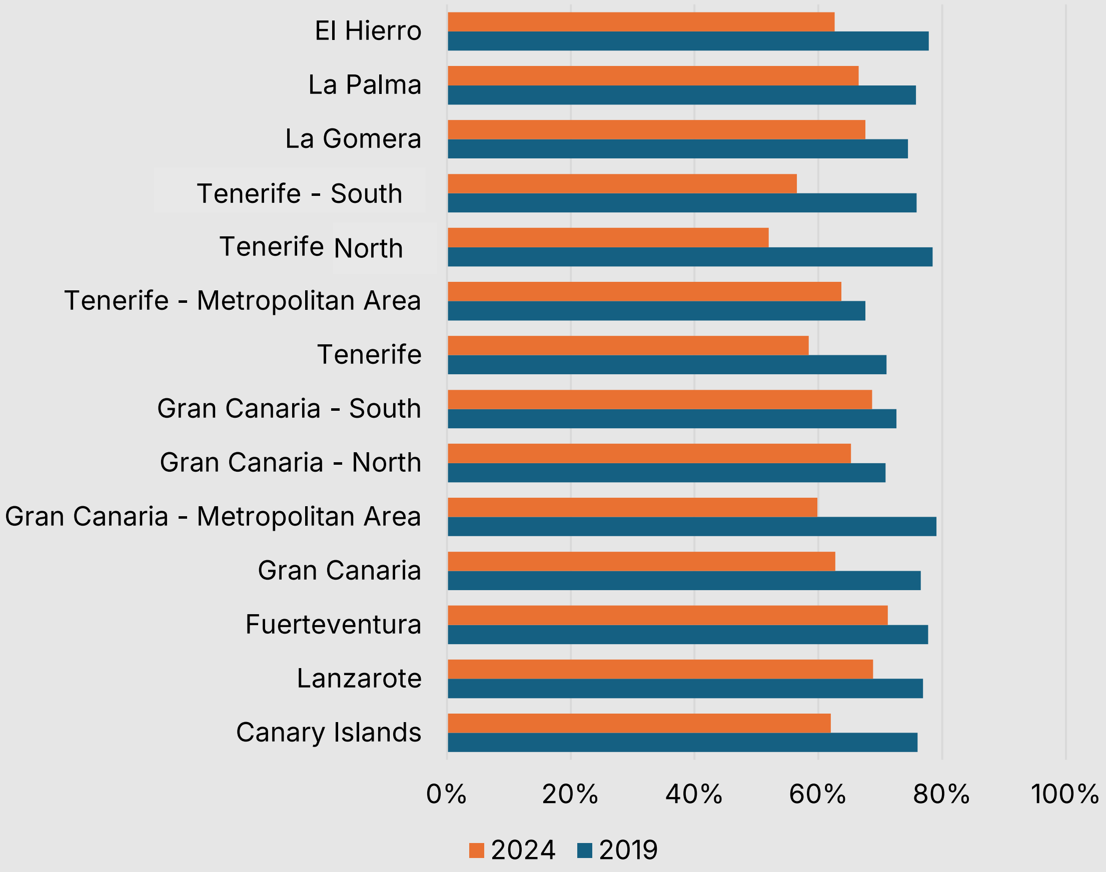
Source: Survey of Socioeconomic Habits and Trust (ECOSOC), 2nd quarter of 2019 and 2024 (ISTAC)

Tourism must continue to be promoted as one of the basic engines of the island's economy



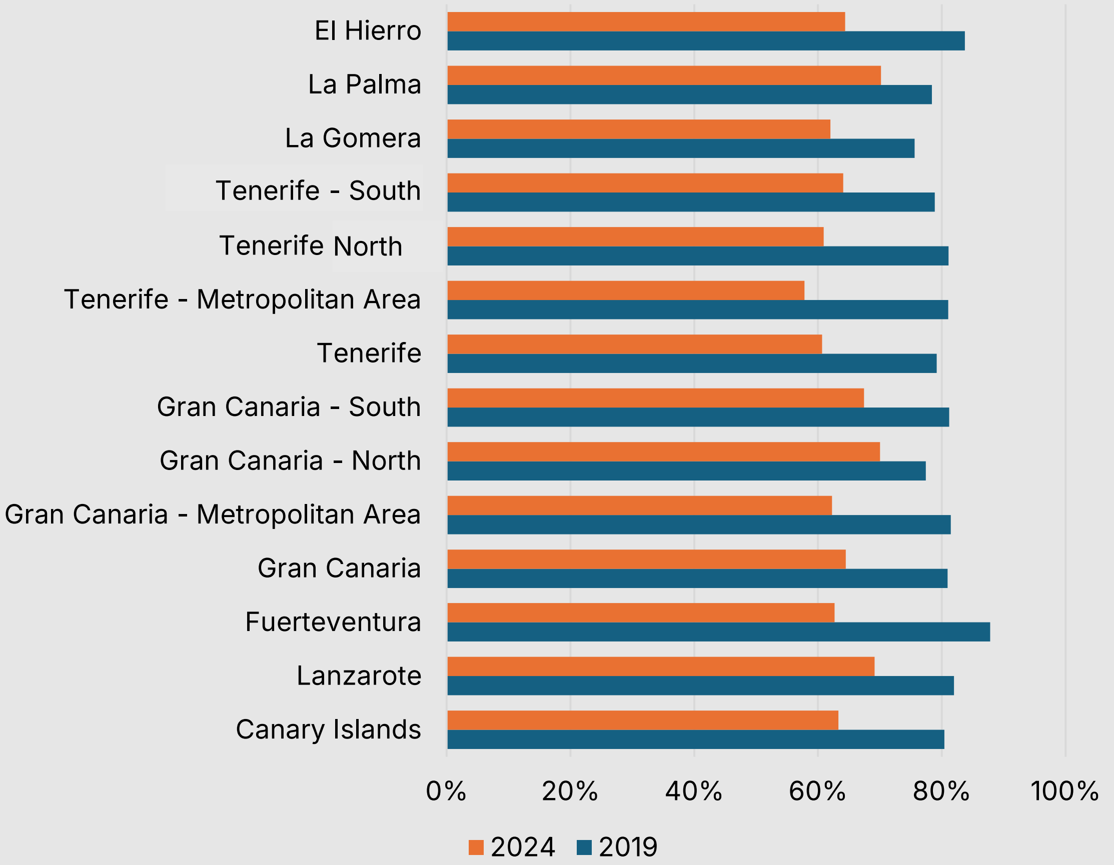
Source: Survey of Socioeconomic Habits and Trust (ECOSOC), 2nd quarter of 2019 and 2024 (ISTAC)

Percentage of the population that considers that tourism development has been very beneficial for the island and its inhabitants ("agree" or "strongly agree")



Source: Survey of Socioeconomic Habits and Trust (ECOSOC), 2nd quarter of 2019 and 2024 (ISTAC)

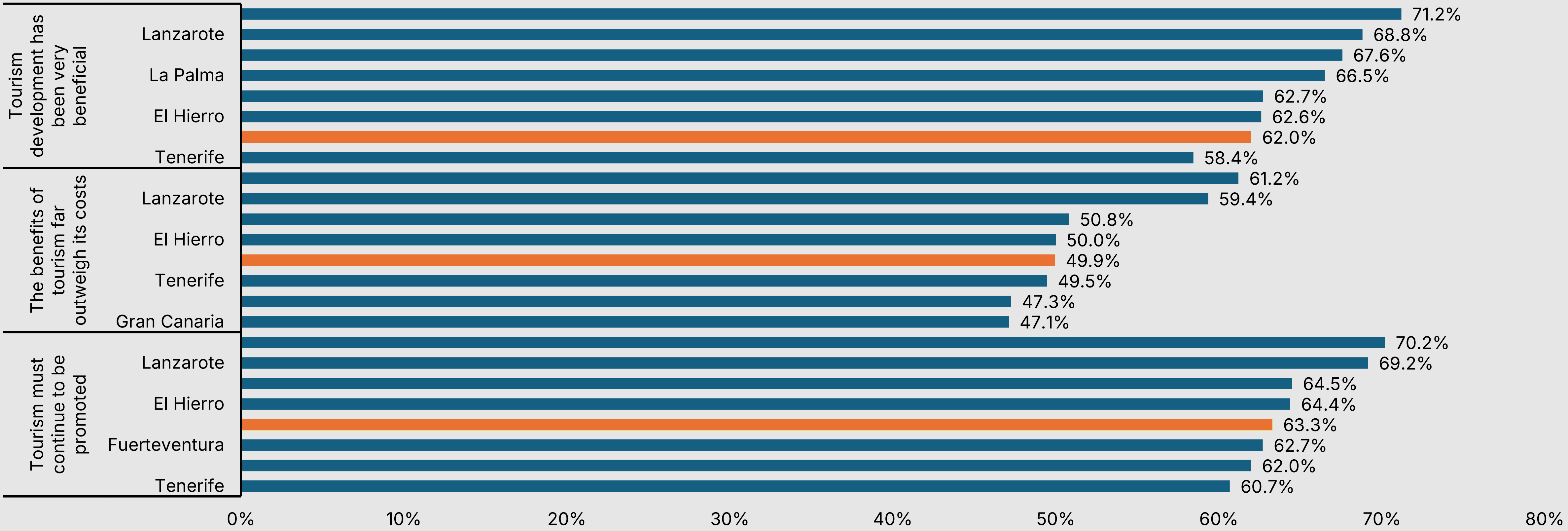
Percentage of the population that believes that tourism should continue to be promoted as one of the basic engines of the island's economy ("agree" or "strongly agree")



Source: Survey of Socioeconomic Habits and Trust (ECOSOC), 2nd quarter of 2019 and 2024 (ISTAC)

The majority of residents across all islands consider that tourism has a positive impact on their communities, highlighting benefits such as job creation, infrastructure development and economic growth. However, the chart also shows some variation between islands, with Fuerteventura and Lanzarote reporting the highest percentages of residents who view tourism positively. Overall, the results indicate that tourism is seen as a key driver of economic development in the Canary Islands.

Percentage of the population that "agrees" or "strongly agrees" with the following statements about tourism activity on their island of residence in the second quarter of 2024

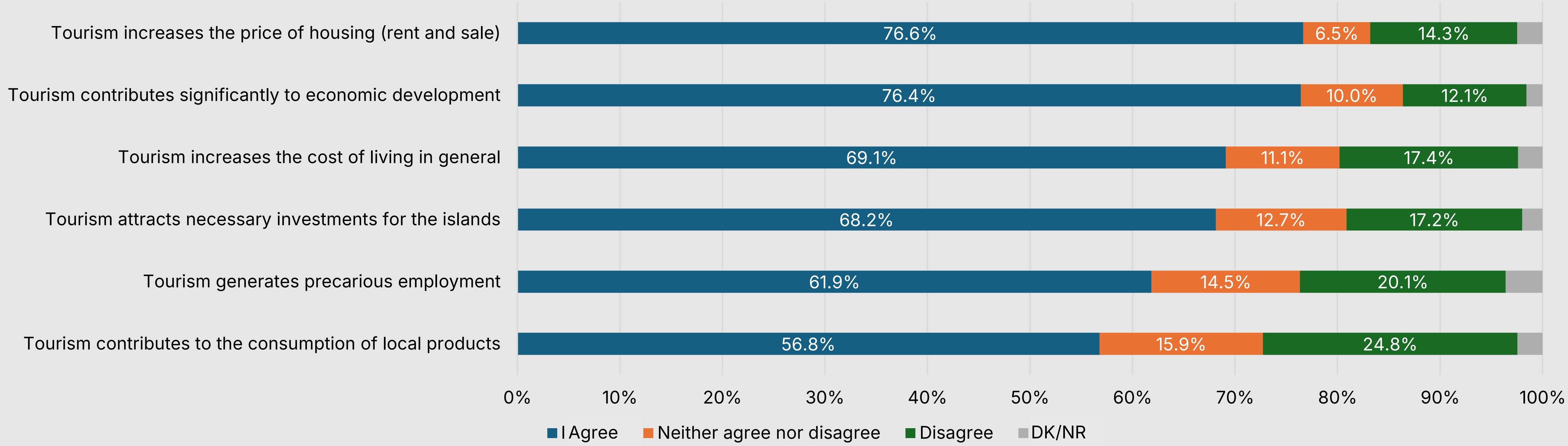


Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Perception of the economic impact of tourism

Respondents generally acknowledge that tourism makes a strong contribution to the island's economy, both in positive and negative terms. While they recognise that tourism significantly supports economic development, they also highlight its impact on rising housing costs and the overall cost of living. In addition, there is a widespread perception among respondents that tourism generates precarious employment.

Population's perception of the economic impacts of tourism (%): second quarter 2024 in the Canary Islands



Note: The categories "Agree" and "Disagree" correspond to the sum of the responses "Strongly agree" and "Agree", and "Disagree" and "Strongly disagree", respectively.
Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

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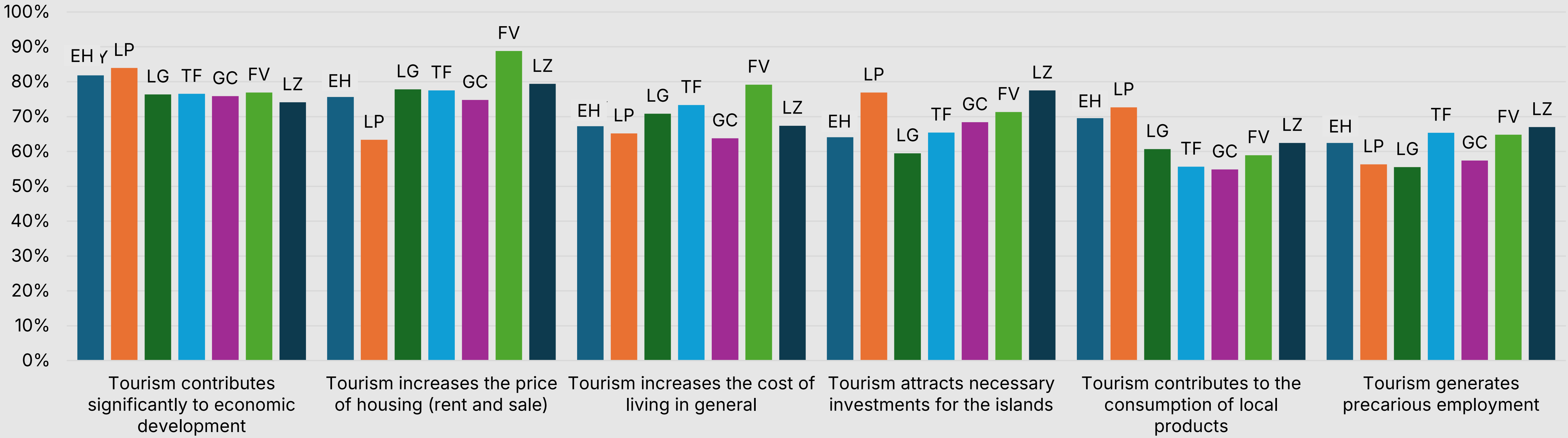
Although perceptions of tourism across the islands follow a broadly similar pattern, there are some noteworthy nuances. In the smaller western islands, tourism is more strongly perceived as contributing to the economy through the consumption of local products. Fuerteventura leads in the perception of negative impacts of tourism on housing prices and the cost of living. Lanzarote, Tenerife and La Gomera also stand out for their high perception of rising housing costs. The attraction of foreign investment is more widely perceived in Lanzarote and La Palma. Perceived labour precariousness in the tourism sector is most prominent in Tenerife, Fuerteventura and El Hierro.

Percentage of the population that "agrees" or "strongly agrees" with the following economic impacts of tourism, second quarter of 2024

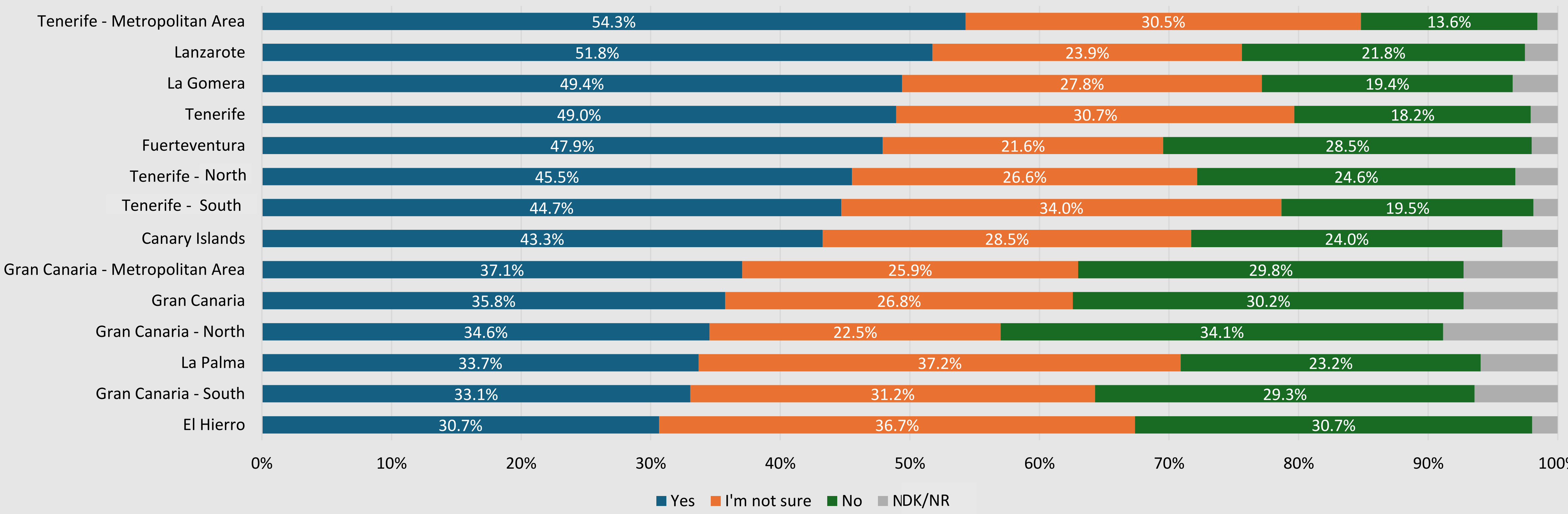


Note: EH, El Hierro; LP, La Palma; LG, La Gomera; TF, Tenerife; GC, Gran Canaria; FV, Fuerteventura; LZ, Lanzarote
Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Residents' opinion on the payment of tourist taxes

Opinions on the introduction of tourist taxes vary significantly across the islands. The highest levels of support for this measure are found in Lanzarote, La Gomera, Tenerife and Fuerteventura. Notably, in this regard, residents of Gran Canaria align more closely with those of La Palma and El Hierro. It is also worth highlighting that, within Tenerife, residents in the Metropolitan Area express the most favourable opinion towards the introduction of a tourist tax.

Population aged 18 and over who consider that tourists must pay a tourist tax (%), second quarter of 2024

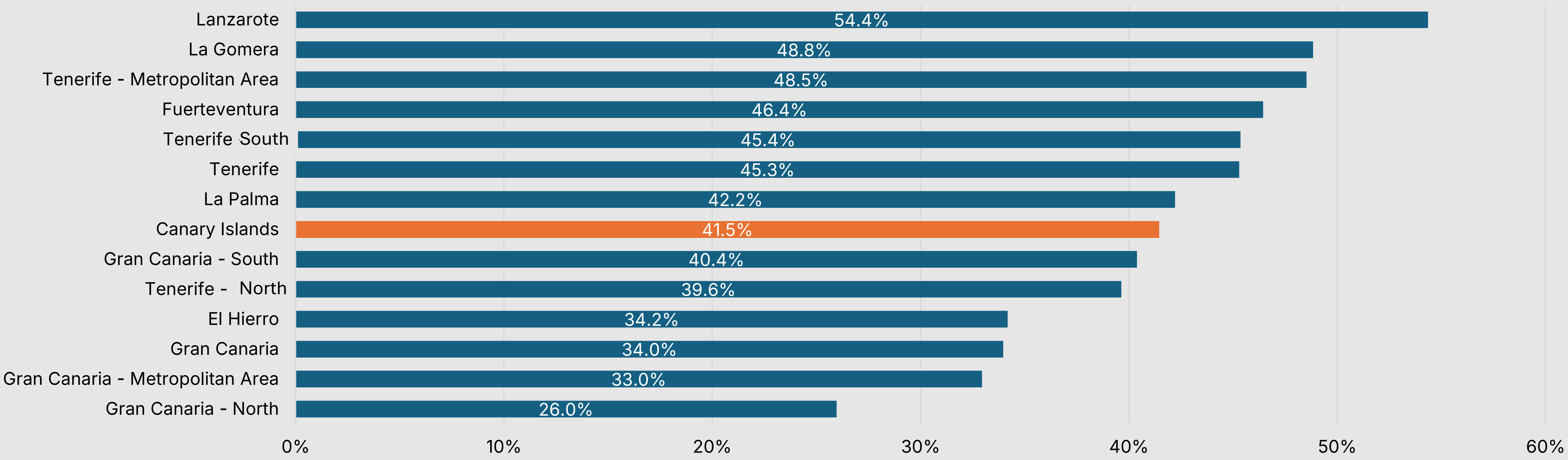


Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

The analysis of residents' willingness to pay an overnight stay tax (tourist tax) reveals slightly different results compared to opinions on applying the tax exclusively to non-residents. The highest levels of support for this tax are found in Lanzarote, La Gomera, Tenerife, and Fuerteventura. In the latter two islands, there appears to be stronger support for a tax applied only to non-residents, which contrasts with the previous chart.

At first glance, it seems that in some islands there is greater willingness—or more clarity—regarding residents paying more than tourists (LZ, TN-S, LP, GC-S, EH). However, when asked whether Canarian residents themselves should pay such a tax, support drops to 14.5%, indicating that they generally do not view it as appropriate, even though 41.5% express individual willingness to assume the cost.

Population that would be willing to pay the *tourist tax* if they stayed on holiday on the islands (%), second quarter of 2024

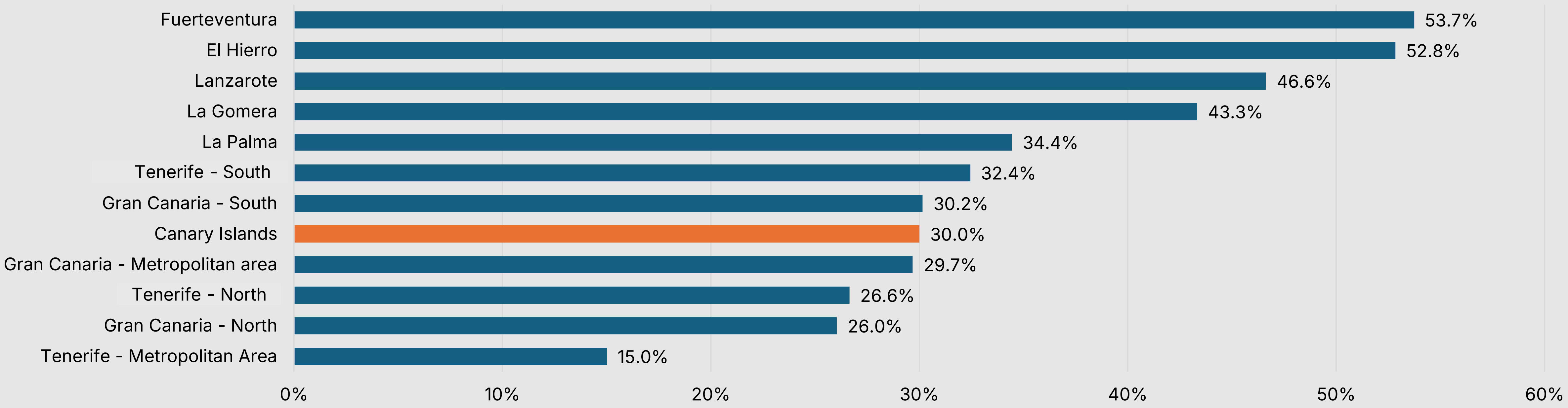


Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Residents' perception of short term rentals

The islands of Fuerteventura, El Hierro, Lanzarote, La Gomera and La Palma, in that order, are those where respondents report a high or very high presence of holiday rental properties in their immediate surroundings. In the south of Tenerife and Gran Canaria, the perception is also relatively high. In the metropolitan areas of the capital cities, the figures for Gran Canaria are almost double those for Tenerife. All of these findings appear to be broadly consistent with the geographic distribution of holiday rentals in the Canary Islands. The rapid increase in the number of holiday rental properties in certain areas may also be influencing these perceptions.

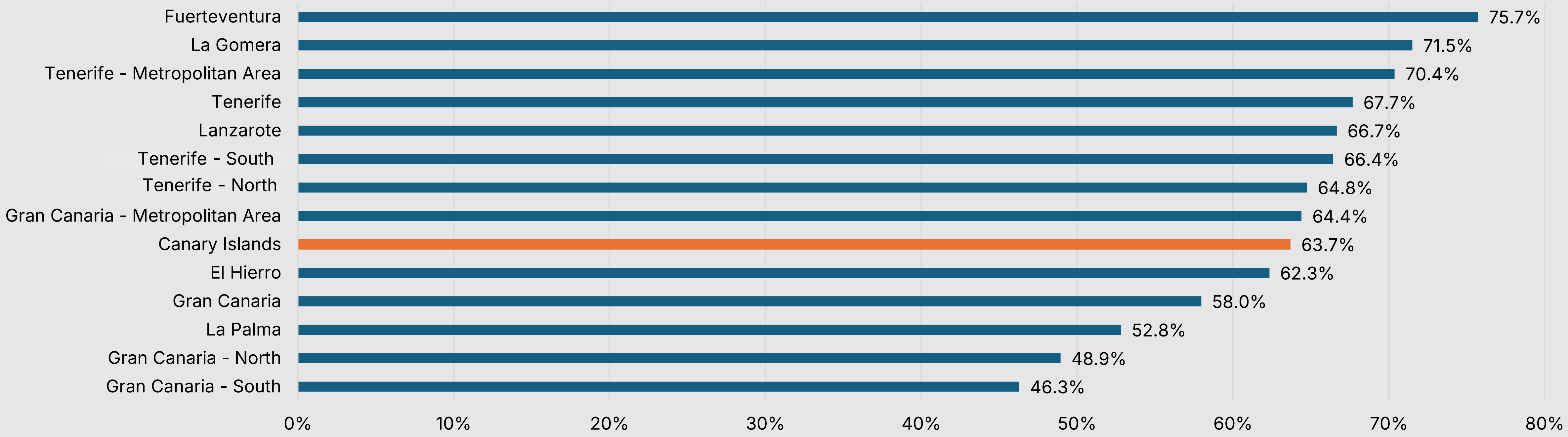
Population that believes that there are "quite a lot" or "a lot" of short term rentals in their neighbourhood (%), second quarter of 2024



Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

The islands of Fuerteventura, La Gomera, Tenerife and Lanzarote are those where the negative impact of tourism on housing prices is most strongly perceived, and where residents are more likely to support stricter regulation of holiday rentals. Notably, in Gran Canaria, perceptions are more aligned with those found in El Hierro or La Palma. In any case, across all islands, the majority of the population supports tighter regulation. The case of the Metropolitan Area of Gran Canaria is particularly striking, as support for stricter regulation is considerably higher there than in the north or south of the island. These differences in Gran Canaria appear to be linked to the lower prevalence of the holiday rental phenomenon compared to other islands.

Population that considers that short term rentals should be more strictly regulated (%), second quarter of 2024

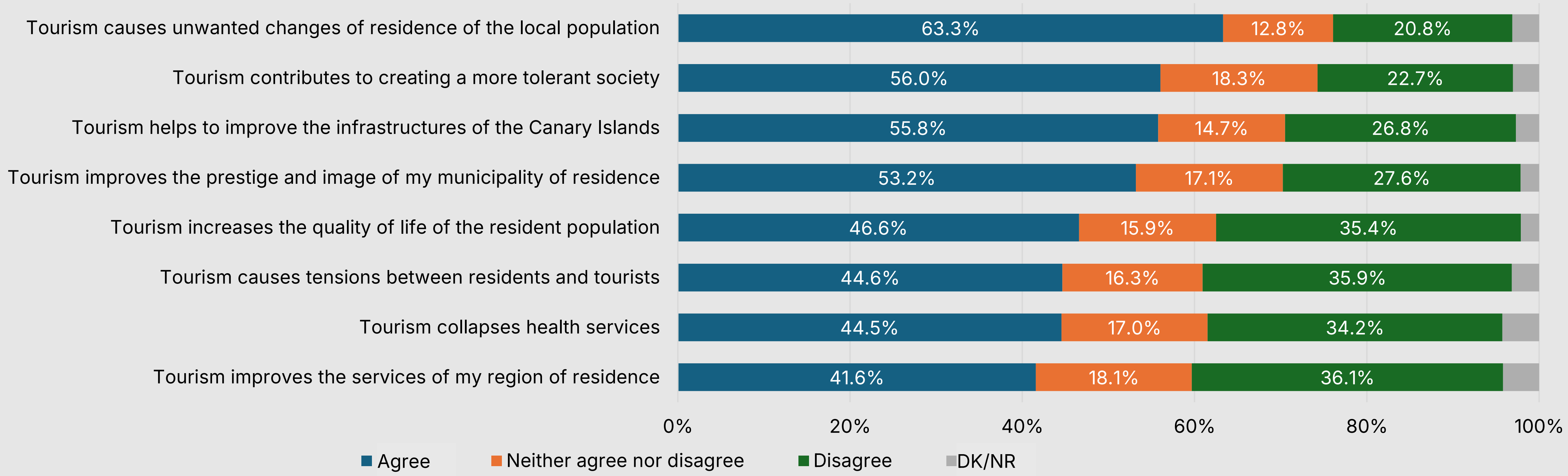


Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Residents' perception of the social impacts of tourism

A total of 63.3% of the Canary Islands' population believes that tourism leads to unwanted changes in residence—presumably due to rising prices. As for other variables, the positive impacts of tourism are generally rated more favourably than the negative ones, with the exception of improvements to local public services. In any case, 44.6% of respondents state that tourism generates tensions between residents and tourists, and a similar proportion believe it overwhelms the healthcare system. These impacts have been exacerbated by the growth of holiday rentals, as in some islands—such as Lanzarote, Fuerteventura, and El Hierro—around half of the population report that there is a high or very high concentration of holiday rentals in their neighbourhood.

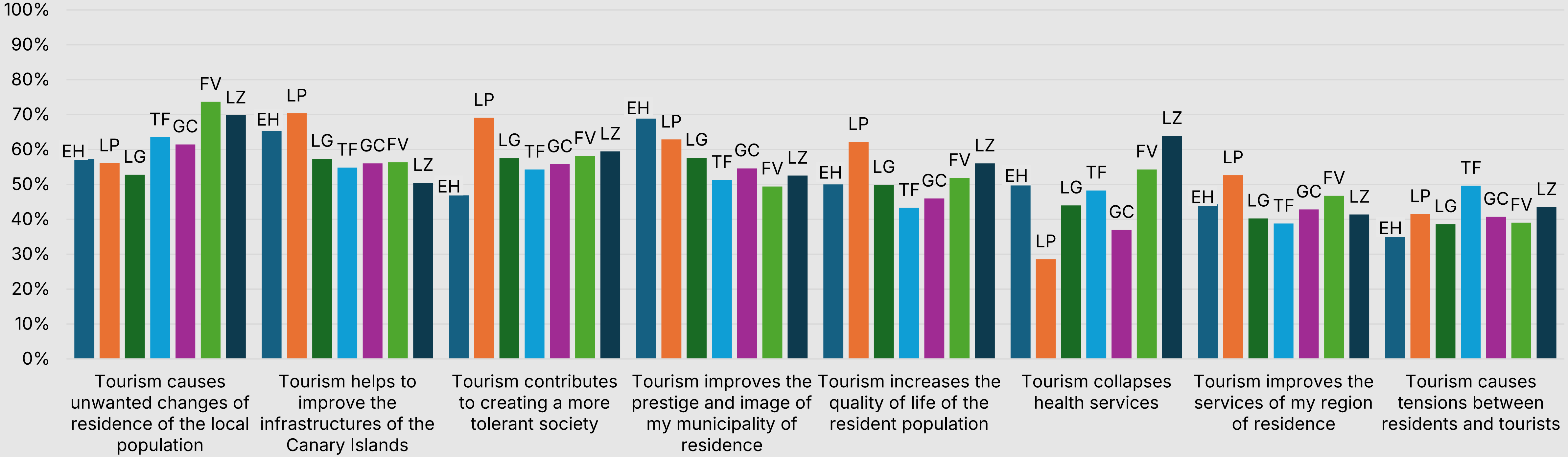
Population's perception of the social impacts of tourism (%) in the second quarter of 2024



Note: The categories "Agree" and "Disagree" correspond to the sum of the responses "Strongly agree" and "Agree", and "Disagree" and "Strongly disagree", respectively.
Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

In relation to the previous charts, Lanzarote, Fuerteventura and, to a lesser extent, Tenerife and Gran Canaria report a stronger perception of unwanted residential displacement, which is linked to rising housing prices. El Hierro and La Palma stand out for perceived improvements in infrastructure and the island's public image. In La Palma, there is also a stronger perception of increased social tolerance and improvements in the quality of life. Lanzarote and Fuerteventura are also among the islands with the highest perception of improved quality of life, despite concerns about housing displacement and the overloading of healthcare services. The greatest tension between residents and tourists is felt in Tenerife, where it is acknowledged by nearly half of the population.

Population that "agrees" or "strongly agrees" with the following social impacts of tourism (%), second quarter 2024

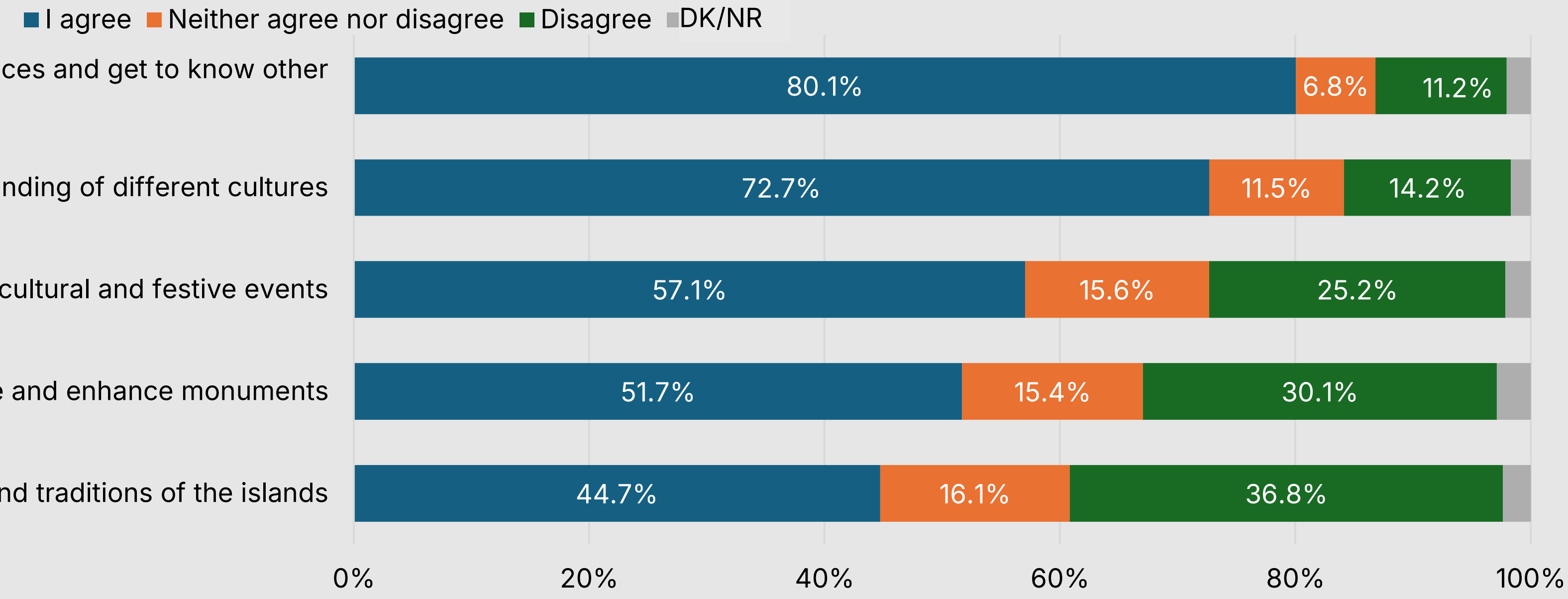


Note: EH, El Hierro; LP, La Palma; LG, La Gomera; TF, Tenerife; GC, Gran Canaria; FV, Fuerteventura; LZ, Lanzarote
Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Residents' perception of cultural impact

Regarding the cultural impact of tourism, the most positive perceptions relate to contact and exchange with people from other places. At the cultural level, there is a moderately positive perception of tourism's role in promoting cultural events. However, only half of the population believes it contributes to the preservation of monumental heritage, and there is a notably negative perception of its impact on cultural identity.

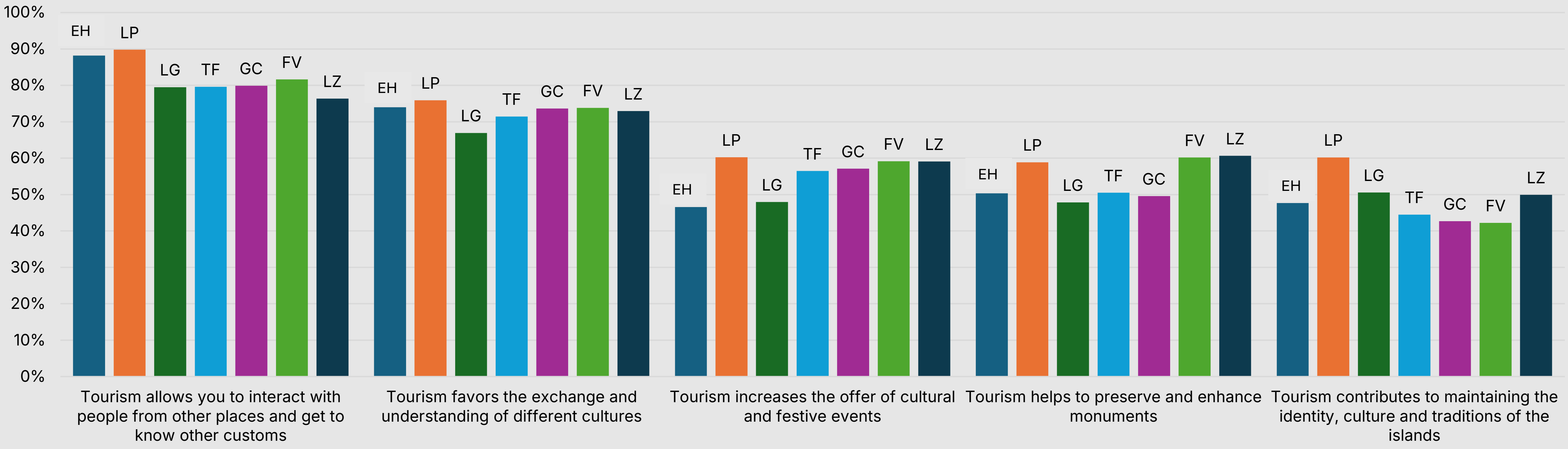
Perception of the population aged 18 and over on the cultural impact of tourism (%): second quarter 2024 in the Canary Islands



Note: The categories "Agree" and "Disagree" correspond to the sum of the responses "Strongly agree" and "Agree", and "Disagree" and "Strongly disagree", respectively.
Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

La Palma stands out in terms of positive perceptions of tourism's cultural impact, ranking as the island where tourism is seen to have the most favourable influence across the majority of cultural aspects. Despite some negative impact, it is worth noting that in Fuerteventura and Lanzarote, there is slightly greater recognition of tourism's contribution to the conservation of monumental heritage. The question with the fewest positive responses across all islands relates to tourism's influence on preserving the culture and traditions of the Canary Islands.

Population that "agrees" or "strongly agrees" with the following cultural impact of tourism in 2024

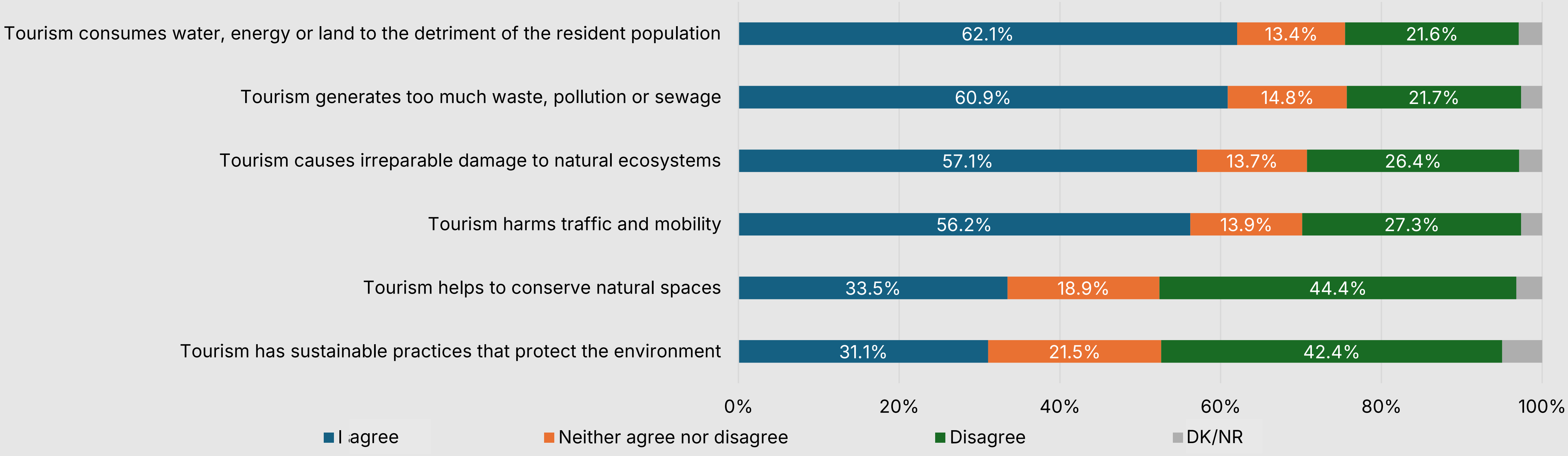


Note: EH, El Hierro; LP, La Palma; LG, La Gomera; TF, Tenerife; GC, Gran Canaria; FV, Fuerteventura; LZ, Lanzarote
Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Residents' perception of environmental impact

The majority of the Canarian population believes that tourism has a negative impact on the environment. Statements referring to negative environmental impact receive agreement from more than half of respondents, particularly in relation to resource consumption (62.1 %) and waste generation (60.9 %). In contrast, statements highlighting positive impact, such as conservation or sustainable practices, receive support from around 30 %, with disagreement exceeding agreement in both cases.

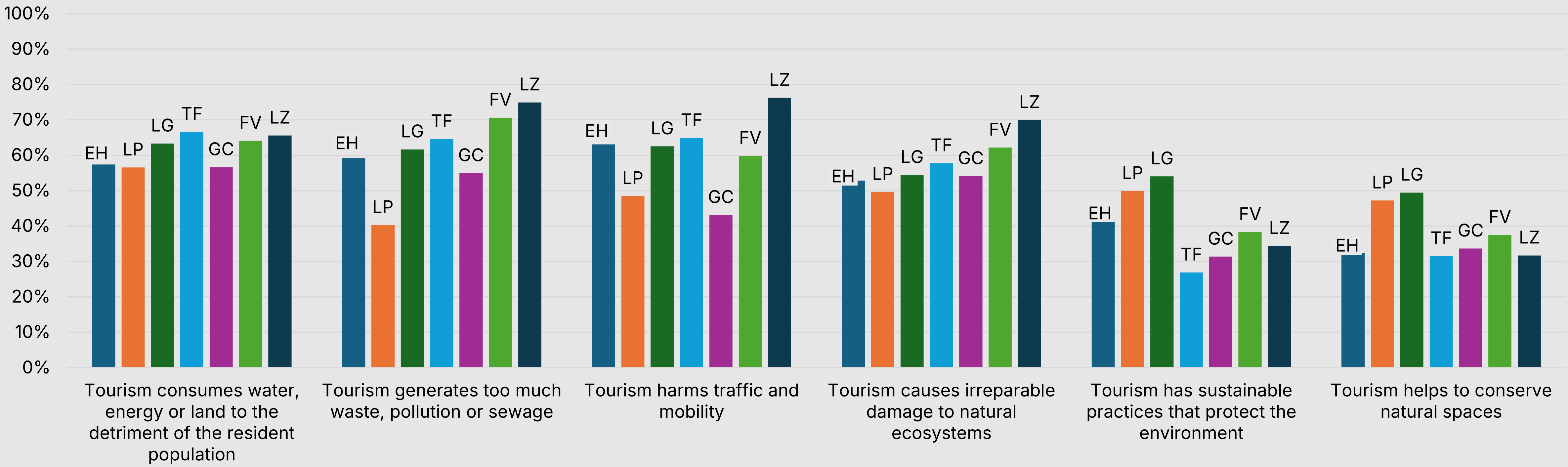
Population's perception of the environmental impact of tourism (%), second quarter of 2024



Note: The categories "Agree" and "Disagree" correspond to the sum of the responses "Strongly agree" and "Agree", and "Disagree" and "Strongly disagree", respectively.
Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

In Lanzarote, the perception of tourism's environmental impact is the most negative among the islands, followed by Fuerteventura and Tenerife. La Gomera and La Palma stand out as the islands where greater environmental benefits are perceived. Gran Canaria is particularly noteworthy, as it shows a generally more positive perception of environmental aspects compared to the other main tourist islands.

Population that "agrees" or "strongly agrees" with the following statements about the environmental impact of tourism (%), second quarter of 2024

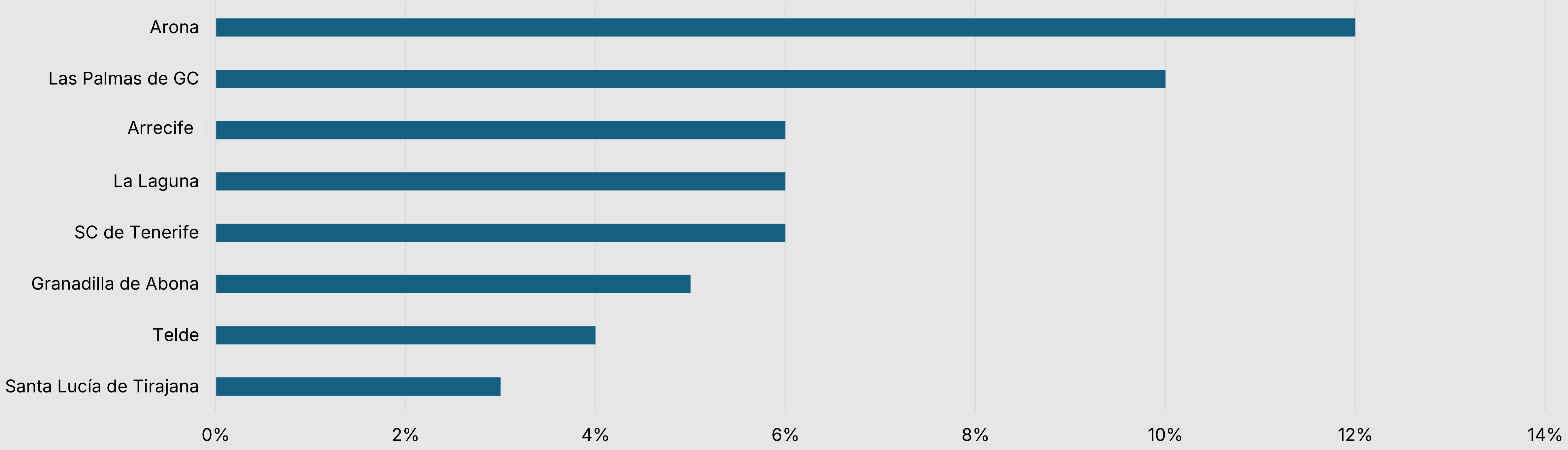


Note: EH, El Hierro; LP, La Palma; LG, La Gomera; TF, Tenerife; GC, Gran Canaria; FV, Fuerteventura; LZ, Lanzarote
Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Quality of the urban environment and quality of life

A significant percentage of homes in municipalities across the Canary Islands are affected by disturbances related to tourism activities and hospitality venues. Cities such as Arona and Las Palmas de Gran Canaria report the highest levels, indicating that coexistence between residents and tourists can pose a challenge.

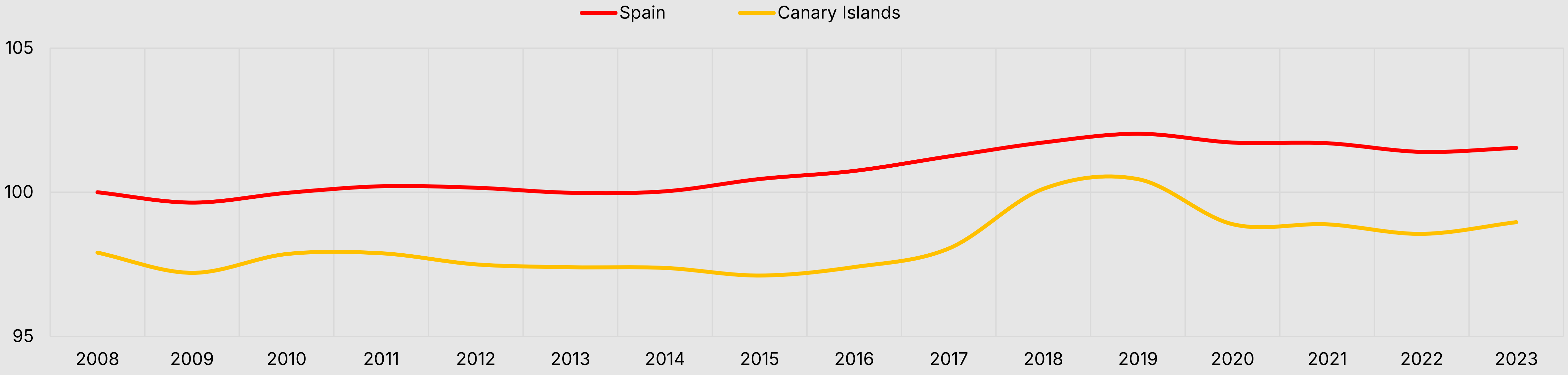
Percentage of homes affected by nuisance related to tourist activities or hospitality establishments in the municipalities of the Canary Islands with more than 50,000 inhabitants in 2021



Note: This survey was conducted in cities with more than 50,000 inhabitants. Source: Survey of Essential Characteristics of the Population and Housing (INE)

The life quality statistics published by the Spanish National Statistics Institute (INE) reflect a situation in the Canary Islands that is consistently worse than the national average. The Multidimensional Quality of Life Indicator is based on 55 core indicators covering material conditions, employment, health, education, leisure, safety, governance, the environment and overall life experience. While these types of indicator can always be refined, the data for the Canary Islands are notably poor. In 2023, the region ranked second to last, only ahead of Ceuta. In fact, the Canary Islands score above the Spanish average in only two components of the index: physical and personal safety, and overall life experience. The debate on tourism's role in this situation has led to two contrasting views. On the one hand, there are those who question how such a successful tourism region can have such precarious living conditions compared to the national average. On the other hand, some argue that it is precisely thanks to tourism development that these conditions are not even worse, and that the broader economic and social context must be considered to fully understand this complex reality.

Global quality of life index according to the multidimensional quality of life indicator

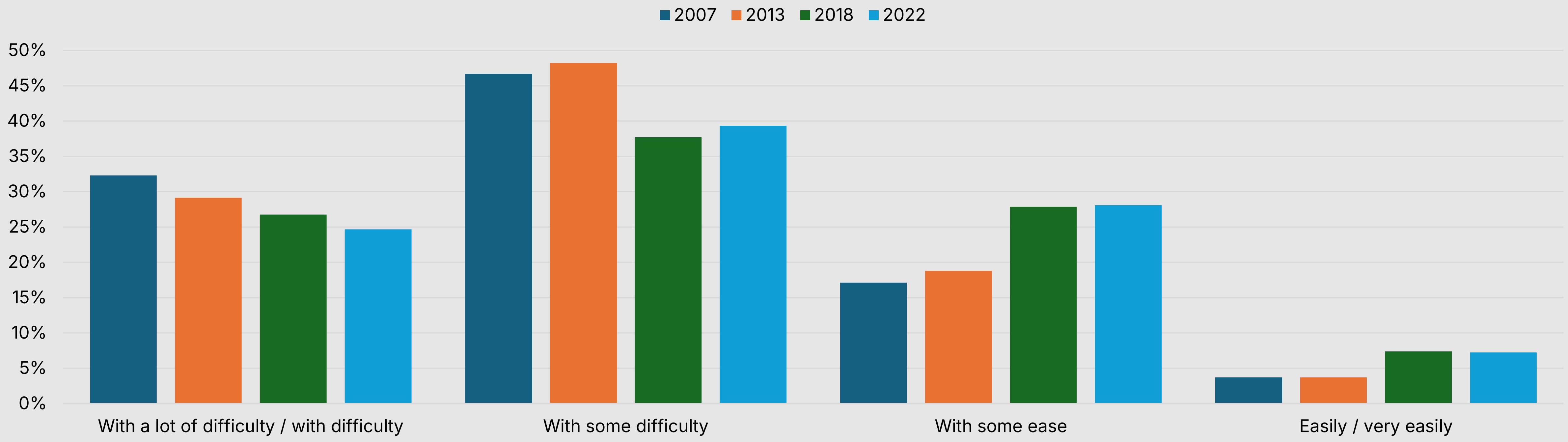


Note: This indicator has 9 dimensions and is an index that takes Spain 2008 as a reference, with a base of 100
Source: Multidimensional Quality of Life Indicator, experimental statistics (INE)

Economic hardship and poverty

Households in the Canary Islands face difficulties in making ends meet, although a slight improvement has been observed in the most recent years. Notable findings include the increase in the number of households reporting that they are able to make ends meet with some ease or even with great ease. At the same time, the proportion of households experiencing great difficulty has been declining. In any case, the figures for the Canary Islands in this area remain very negative, as will be shown in the comparison on the following page.

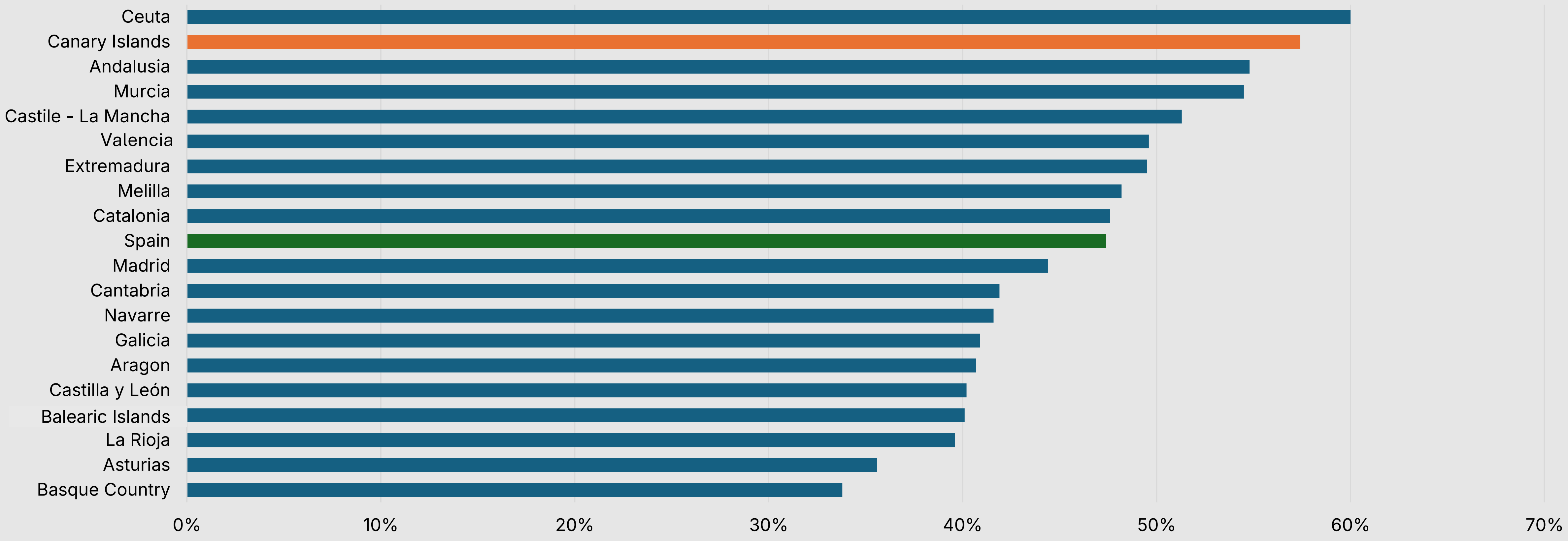
Distribution of households in the Canary Islands according to difficulty in making ends meet



Source: Income and Living Conditions Survey (ISTAC)

The Canary Islands were the autonomous community with the greatest difficulty in making ends meet in the country. In comparison with the Balearic Islands, it is evident that the Canary Islands are in a critical situation, with approximately 20 % more of the population experiencing difficulty in making ends meet.

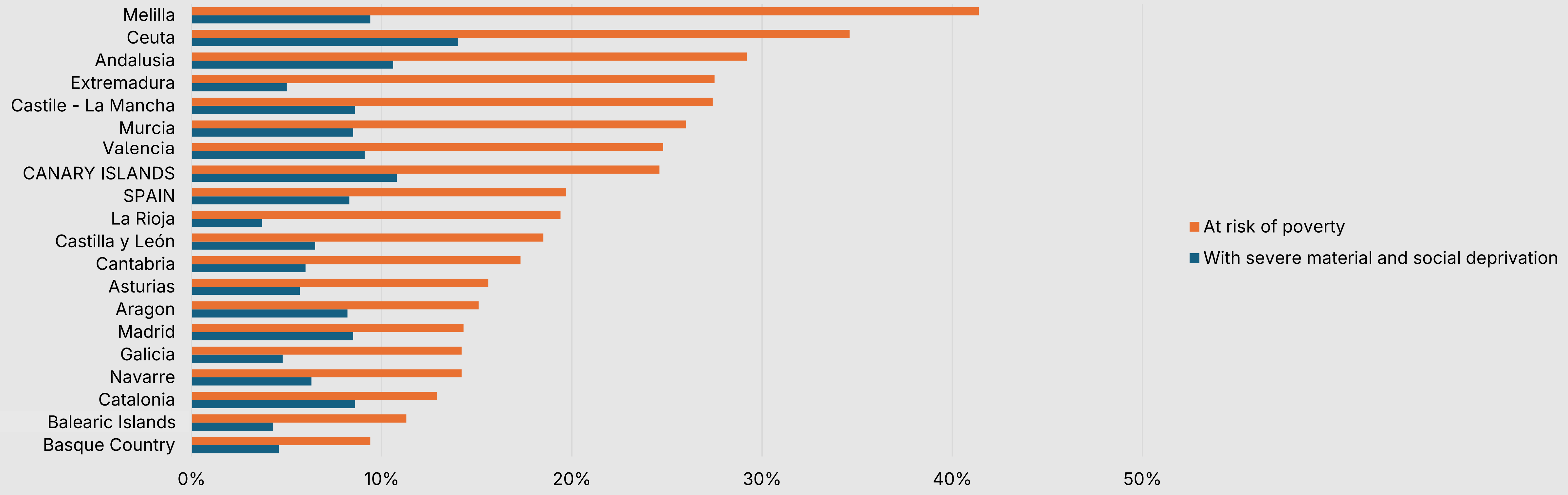
Percentage of the population with difficulty in making ends meet by autonomous community in 2024



Source: Living Conditions Survey (INE)

The Canary Islands rank as the eighth autonomous community in terms of risk of poverty, and second in severe material and social deprivation. It is worth highlighting the wide gap between the Canary Islands and the Balearic Islands, particularly in terms of the population at risk of poverty, with 13 percentage points more of the population affected in the Canary Islands (24.6 % compared to 11.3 % respectively).

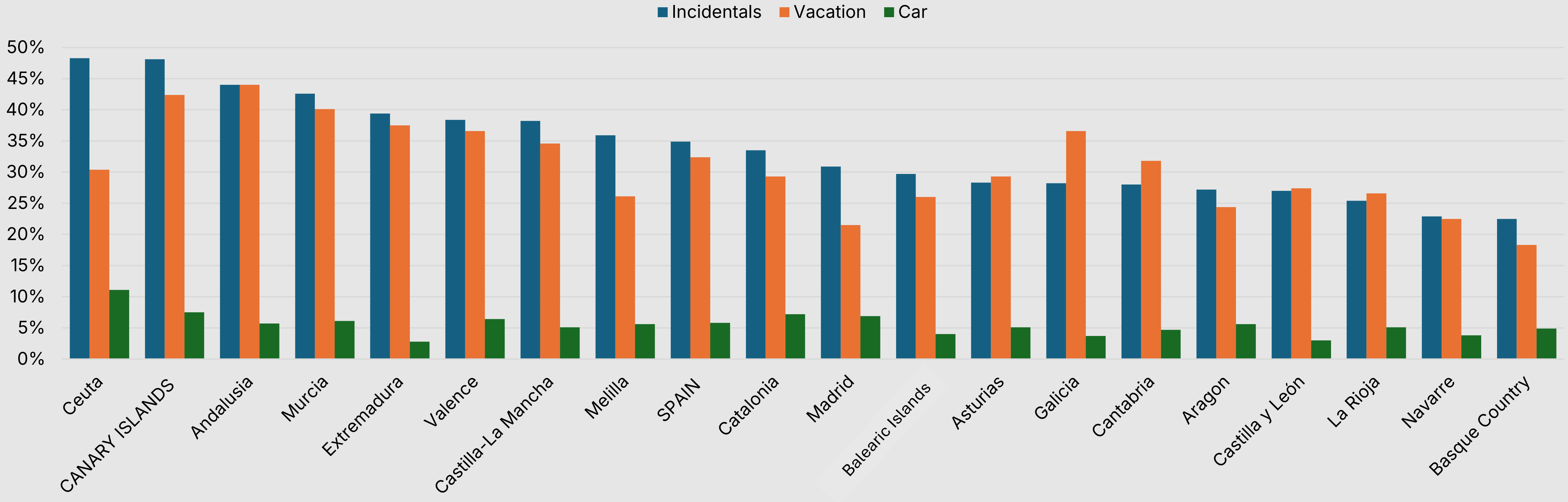
Percentage of the population at risk of poverty or with severe material deprivation by autonomous community in 2024



Source: Living Conditions Survey (INE)

The Canary Islands are the autonomous community with the worst figures in Spain in terms of the ability to cope with unexpected expenses, second only to the Autonomous City of Ceuta. A total of 48.1 % of the population state that they are unable to cover unexpected expenses, 42.4 % cannot afford to go on holiday once a year, and 7.5 % cannot afford a car.

Percentage of households that cannot afford unforeseen expenses, holidays at least one week per year or a car in 2024



Source: Living Conditions Survey (INE)

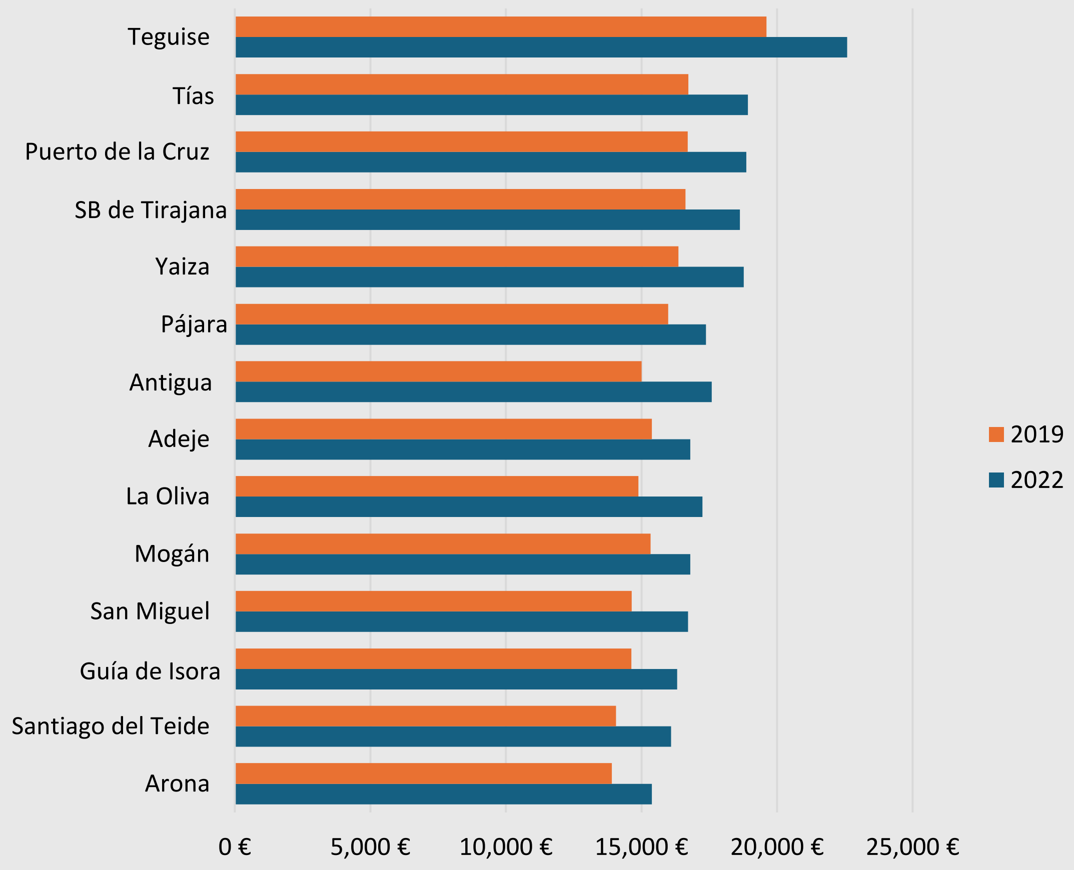
Teguise is the only tourist municipality with an average income per consumption unit above the regional average in the Canary Islands, reaching approximately €22,500 in 2022 compared to €19,000 per household across the archipelago.

The issue of income levels in tourist municipalities requires more detailed analysis in the future. The low figures currently observed may appear contradictory when compared with other socio-economic indicators in these areas, such as business dynamism or housing prices.

In particular, the available data are subject to methodological limitations that may distort this estimate. This indicator is based on fiscal statistics from the Spanish Tax Agency and therefore only includes income declared by residents of the municipality who pay taxes in Spain. However, a key feature of many Canarian tourist municipalities is the high proportion of foreign residents, whose income may not be captured by the tax system.

Moreover, since only the income of residents is included, the calculation excludes income generated within the municipality by individuals who reside elsewhere. In some tourist municipalities, more than half of the employees registered with workplaces in the area do not actually live there.

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



Source: Atlas of Household Income Distribution (INE)

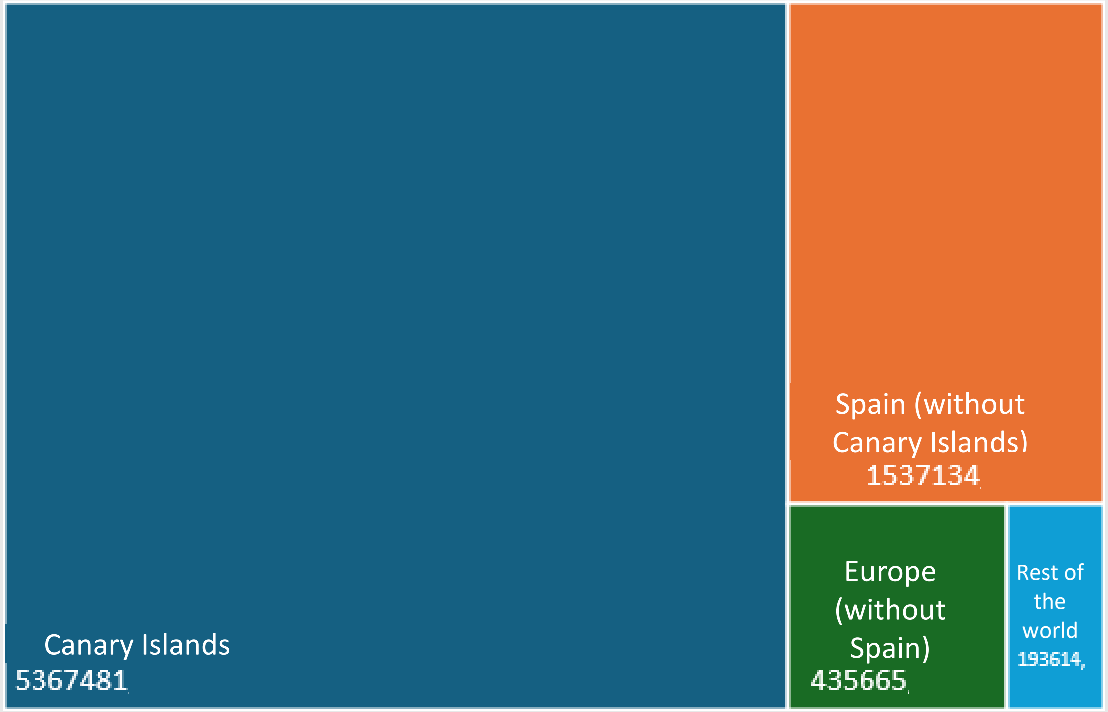
Tourist trips for residents

Public perception of tourism in the Canary Islands is linked, among other factors, to the level of resident participation in tourism-related activities. As shown by 2023 data, the vast majority of trips made by Canarian residents took place within the archipelago. This pattern may influence residents' attitudes towards incoming tourists, as greater involvement in tourism tends to foster a more balanced view of its benefits and impacts. In contrast, if the local population feels that tourism is geared exclusively towards external visitors and that they cannot enjoy it themselves, there is a greater likelihood of rejection or a sense of saturation.

In 2024, a reduction was observed in the number of overnight stays by residents in tourist accommodation within the islands, most likely due to rising prices. Although this is not reflected in the chart, it is a relevant factor to consider, as a decline in local participation may reinforce negative perceptions of the tourism industry. This highlights the need for policies that promote local access to tourism, ensuring that high prices do not push residents out of the market.

A more inclusive tourism model, with measures that allow residents to enjoy tourism infrastructure without being displaced by price increases, would help reduce tensions and improve coexistence between tourists and the local population. In addition, encouraging residents' access to the tourism offer would also strengthen the local economy by broadening the distribution of tourism-related benefits.

Number of tourist trips made by Canarian residents by destination in 2023



Source: Resident Tourism Survey (INE)

Local satisfaction with tourism and local well-being

Indicator	Description	Availability	Source	Remarks
Support for tourism development	Local population rate favourable to additional growth in tourist arrivals or number of beds.	Occasional data	Survey of Socioeconomic Habits and Confidence - ECOSOC (ISTAC)	Need for periodic data.
Perception of the impact of tourism	Average assessment of the economic, social, cultural and environmental impact of tourism. Disturbances related to tourist activities in the vicinity of the main house.	Occasional data	Survey of Socioeconomic Habits and Confidence - ECOSOC (ISTAC) Survey of Essential Characteristics of the Population and Housing (INE)	Need for periodic data. Only available in municipalities with more than 50,000 inhabitants.
Environmental awareness	Percentage of the local population that prefers to protect the environment, even if it means lower economic growth.	Unavailable		
Income and living conditions in tourist municipalities	Average income per unit of consumption in tourist municipalities.		Atlas of Household Income Distribution (INE)	

4.13

Mass tourism and overtourism

Introduction

Mass tourism and overtourism are distinct, though related, concepts that should not be confused. Mass tourism refers to the phenomenon of large volumes of visitors concentrated in specific destinations, driven by accessible transport, the development of infrastructure and global demand. Overtourism, however, is related to the capacity of destinations to absorb tourist flows, the management of those flows to avoid excessive concentrations in space and time, the perception of both residents and tourists, including the psychological impact of crowding, and the environmental impact associated with these flows.

This chapter analyses the scale and concentration of tourism in the Canary Islands, with a particular focus on the impact of holiday rentals, a growing form of accommodation that is transforming the tourism offer and urban dynamics. Although tourist congestion can be an issue in certain areas, its effects must be understood in relation to local perceptions, a topic covered in greater depth in the chapter on resident satisfaction. Achieving a balance between tourism activity and sustainability requires not only managing visitor numbers but also ensuring their distribution across space and time is efficient.

Overtourism is not defined solely by the number of tourists, but by how tourist spaces are managed and by the degree to which residents and visitors are willing to tolerate high levels of presence. Spatial planning, urban policy, regulation of tourist accommodation and diversification strategies all play a key role in preventing saturation in certain areas. Environmental impacts, particularly those on natural and protected areas, are also important and are addressed in another chapter, as pressure on these spaces calls for specific analysis from a conservation and sustainability perspective.

General indicators

Accommodation capacity and other indicators in the Canary Islands and islands in 2024

Territories	Area (km²) (ISTAC)	Inhabitants (ISTAC)	Hotel beds (EAT, ISTAC)	Apartment beds (EAT, ISTAC)	Holiday home beds (EAT, ISTAC)	Total beds (EAT, ISTAC)	Overnight stays in hotels and apartments (EAT, ISTAC)	Tourist equivalent population (hotels and apartments) (ISTAC)	Total beds / 100 inhabitants (tourist intensity)	Total beds / km² (tourist density)	Inhabitants + equivalent tourist population /extension
Canary Islands	7,445.58	2,228,862	259,238	109,125	195,631	563,994	100,227,490	274,596	25	76	37
Tenerife	2,033.53	955,063	91,567	35,833	79,384	206,784	36,076,748	98,840	22	102	49
Gran Canaria	1,561.52	863,943	69,583	37,611	41,100	148,294	27,934,940	76,534	17	95	49
Lanzarote	846.89	163,467	43,206	21,585	35,706	100,497	18,464,141	50,587	61	119	60
Fuerteventura	1,661.30	127,043	50,027	9,577	27,097	86,701	16,007,832	43,857	68	52	26
La Palma	706.98	85,104	3,375	1,901	7,474	12,750	991,037	2,715	15	18	4
La Gomera	367.65	22,436	1,160	2,155	2,967	6,282	662,359	1,815	28	17	5
El Hierro	267.72	11,806	321	463	1,877	2,660	90,433	248	23	10	1

Note: The concept of equivalent tourist population published by ISTAC refers to the average number of tourists staying in hotels and apartments (not including short term rentals) each day (number of annual overnight stays divided by the number of days in the year)
Source: Territorial Statistics, 2024 (ISTAC). Official Population Figures, 2024 (ISTAC). Tourist Accommodation Survey (EAT), 2024 (ISTAC)

Accommodation capacity and other indicators of municipalities with the most places in 2024

Territories	Area (km²) (ISTAC)	Inhabitants (ISTAC)	Hotel beds (EAT, ISTAC)	Apartment beds (EAT, ISTAC)	Holiday home beds (EAT, ISTAC)	Total beds (EAT, ISTAC)	Overnight stays in hotels and apartments (EAT, ISTAC)	Tourist equivalent population (hotels and apartments) (ISTAC)	Total beds / 100 inhabitants (tourist intensity)	Total beds / km² (tourist density)	Inhabitants + Equivalent tourist population / extension
SB de Tirajana	332.42	54,116	43,684	24,950	15,338	83,972	18,009,999	49,342	155	253	148
Adeje	105.95	50,549	35,191	11,330	18,846	65,367	13,839,613	37,917	129	617	358
Arona	81.60	86,624	21,376	16,457	17,264	55,096	10,014,981	27,438	64	675	336
Pájara	384.94	21,614	29,190	4,374	4,323	37,886	8,968,372	24,571	175	98	64
Mogán	171.42	21,175	17,594	11,863	6,695	36,152	8,040,501	22,029	171	211	129
Tías	64.32	21,462	12,338	13,354	9,376	35,068	7,339,188	20,107	163	545	313
Yaiza	212.09	18,113	17,077	4,130	12,889	34,096	6,064,079	16,614	188	161	78
La Oliva	355.33	29,693	10,808	2,129	15,094	28,030	3,547,112	9,718	94	79	27
Puerto de la Cruz	8.83	31,377	15,621	4,390	3,888	23,899	5,751,799	15,758	76	2,708	1,785
Teguise	263.03	23,848	10,774	4,037	6,788	21,598	4,324,633	11,848	91	82	45
Antigua	250.25	13,832	8,369	3,074	4,692	16,135	2,963,934	8,120	117	64	32
Las Palmas de GC	103.32	380,436	7,151	799	8,006	15,956	1,668,214	4,570	4	154	44
Santiago del Teide	52.11	12,373	4,755	1,674	3,839	10,268	1,988,780	5,449	83	197	105
San Miguel	42.04	23,138	3,915	882	4,174	8,971	1,453,294	3,982	39	213	95
SC de Tenerife	150.44	211,359	2,714		3,568	6,282	584,273	1,601	3	42	11

Note: The concept of equivalent tourist population published by ISTAC refers to the average number of tourists staying in hotels and apartments (not including short term rentals) each day (number of annual overnight stays divided by the number of days in the year). Source: Territorial Statistics, 2024 (ISTAC). Official Population Figures, 2024 (ISTAC). Tourist Accommodation Survey (EAT), 2024 (ISTAC)

Accommodation capacity and other indicators of micro-destinations with the most places in 2024

Territories	Area (km²) (ISTAC)	Inhabitants (ISTAC)	Hotel beds (ALOJATUR)	Apartment beds (ALOJATUR)	Holiday home beds (RGT, 2024)	Total beds (ALOJATUR and RGT)	Overnight stays in hotels and apartments (EAT, ISTAC)	Tourist equivalent population (hotels and apartments) (ISTAC)	Total beds / 100 inhabitants (tourist intensity)	Total beds / km² (tourist density)	Inhabitants + Equivalent tourist population / extension
Playa del Inglés (Gran Canaria)	3.2	9,133	20,865	17,037	4,260	42,162	9,348,908	25,613	462	13,056	10,760
Las Américas-Arona (Tenerife)	2.7	4,512	15,837	9,046	4,068	28,951	6,894,064	18,888	642	10,897	8,808
Costa Adeje (Tenerife)	1.4	3,196	13,059	5,503	2,333	20,895	5,580,062	15,288	654	15,283	13,520
Corralejo (Fuerteventura)	6.7	15,665	10,079	1,486	8,619	20,184	3,131,638	8,580	12	3,026	3,634
Las Canteras (Gran Canaria)	3.1	86,597	5,490	799	12,180	18,469	1,381,079	3,784	21	5,918	28,962
Los Cristianos (Tenerife)	3.3	15,350	3,575	7,912	6,448	17,935	2,838,686	7,777	117	5,403	6,967
Caleta de Fuste (Fuerteventura)	7.5	7,809	8,498	2,946	4,292	15,736	2,963,934	8,120	202	2,106	2,132
Playa del Duque (Tenerife)	3.6	1,902	12,502	602	2,002	15,106	4,008,866	10,983	794	4,235	3,612
Playa Grande (Lanzarote)	3.6	6,669	1,594	9,090	4,310	14,994	2,881,213	7,894	225	4,109	3,991
Costa Teguise-Litoral (Lanzarote)	3.1	4,156	9,417	3,176	2,299	14,892	3,695,363	10,124	358	4,864	4,664
Montaña Roja (Lanzarote)	9.1	7,191	7,049	3,284	4,347	14,680	2,943,027	8,063	204	1,621	1,685
Matagorda-Los Pocillos (Lanzarote)	3.1	1,268	9,497	3,487	986	13,970	3,834,003	10,504	1,102	4,578	3,858
Esquinzo-Butihondo (Fuerteventura)	5.9	1,474	12,699	494	135	13,328	3,836,562	10,511	904	2,263	2,035
Costa Calma (Fuerteventura)	3.4	4,872	9,087	1,688	1,808	12,583	2,937,671	8,048	258	3,750	3,851
Meloneras (Gran Canaria)	3.4	949	10,411	54	842	11,307	3,100,505	8,495	1,192	3,370	2,814

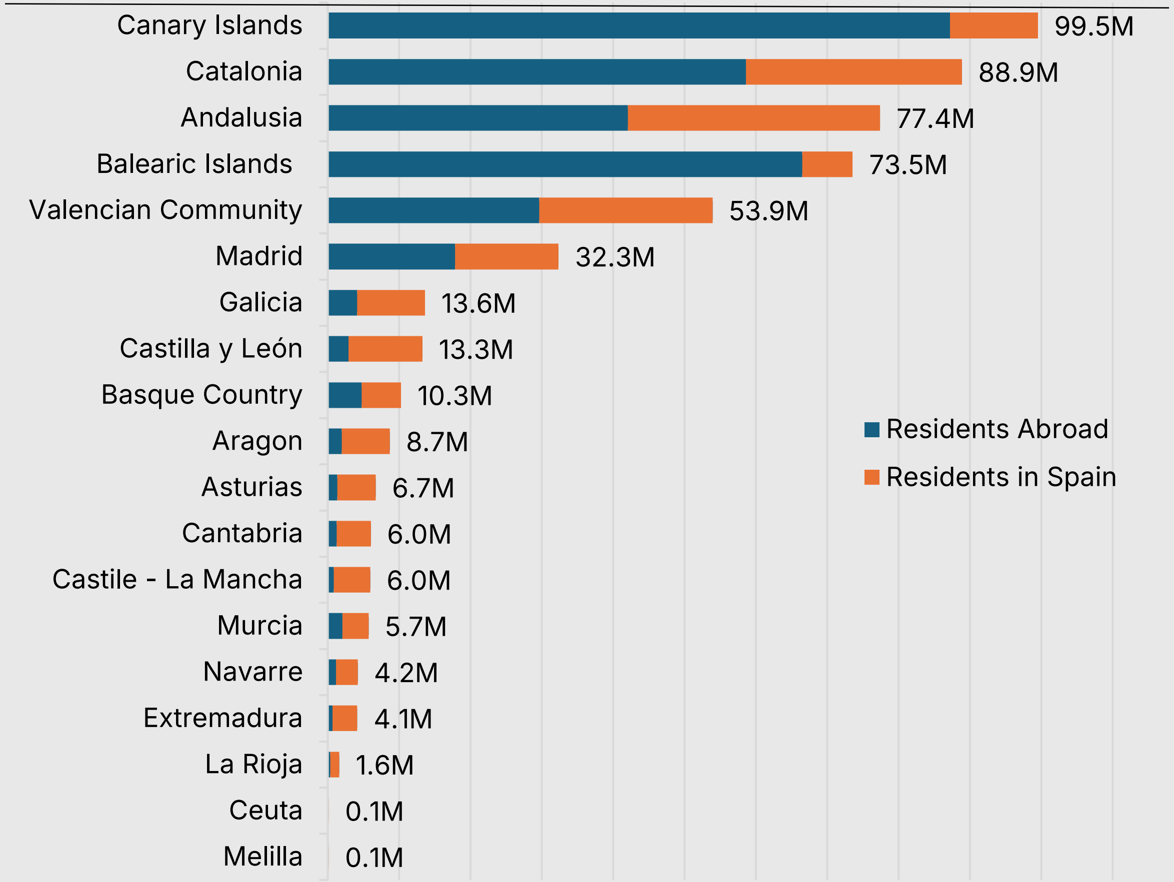
Note: The concept of equivalent tourist population published by ISTAC refers to the average number of tourists staying in hotels and apartments (not including short term rentals) each day (number of annual overnight stays divided by the number of days in the year). Source: Tourist micro-destinations: micro-destinations of the Canary Islands, 2024 (ISTAC). Demographic Indicators, 2022 (ISTAC). Directory of Collective Tourist Accommodation, 2024 (ALOJATUR). Tourist Accommodation Survey (EAT), 2024 (ISTAC). General Tourist Registry (RGT) of the Government of the Canary Islands, 2024 (Government of the Canary Islands)

Comparison of tourist overnight stays

As in previous years, the Canary Islands topped the ranking of overnight stays in tourist accommodation in 2024 among the Spanish autonomous communities, with 99.5 million stays, followed by Catalonia (88.9 million), Andalusia (77.4 million), the Balearic Islands (73.5 million) and the Valencian Community (53.3 million). In both the Canary Islands and the Balearic Islands, the share of tourists residing abroad is significantly higher than that of domestic residents. In the other regions, domestic tourism has a much greater presence.

Another interpretation of these figures highlights the strong concentration of tourism in coastal communities, led by the Canary Islands and followed by the Mediterranean coast. This model reinforces tourism dependency in certain regions, with implications for land use, the economy and environmental sustainability. There is also a clear consolidation of urban destinations such as Madrid, which follow a different model from that of the leading coastal regions.

Overnight stays in tourist establishments by Autonomous Communities in 2024



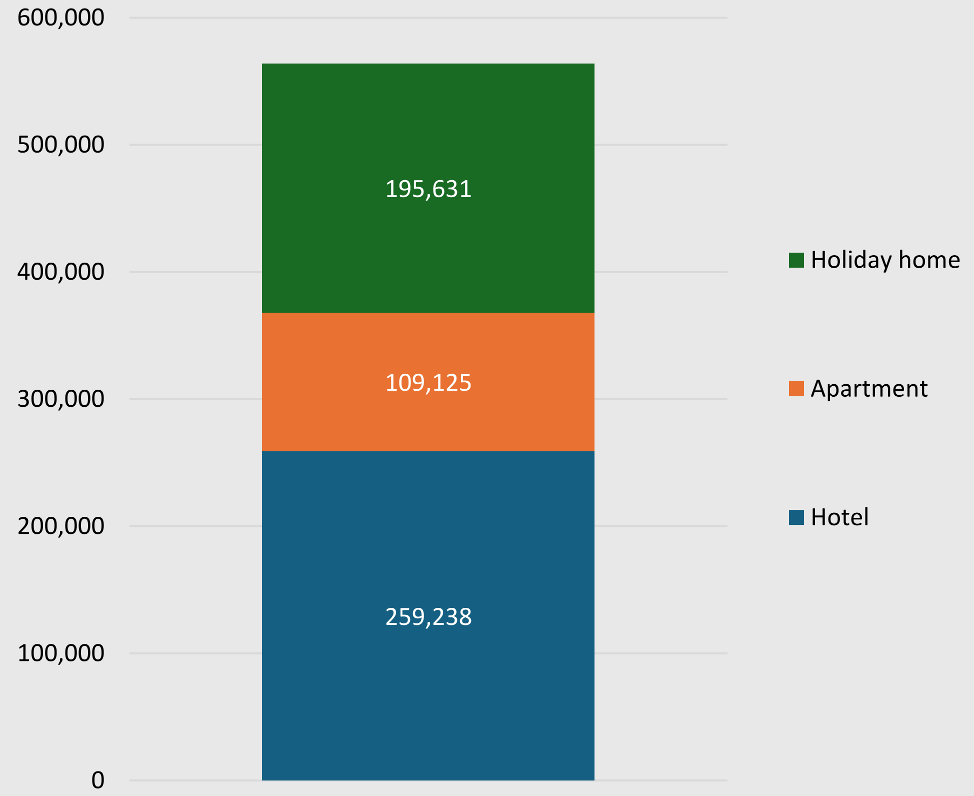
Note: Overnight stays in hotels, campsites, apartments, rural houses and hostels
Source: Employment Surveys (INE)

Size and distribution of accommodation supply

In 2024, tourist accommodation in the Canary Islands was mainly distributed among hotels, holiday rentals, and apartments. Hotels accounted for the largest share, with 259,238 beds—equivalent to 46% of the total. Holiday rentals continued to expand, reaching an annual average of 195,631 beds, representing 34.7% of the total. These figures reflect the sustained growth of short-term holiday rentals in the Canary Islands, which have now surpassed apartments as the second most common form of tourist accommodation in the archipelago. As a result, the diversification of the accommodation supply in the Canary Islands signals a shift in the tourism lodging model, with an increasing share held by holiday rentals.

A significant development in statistical information took place in 2024 with the introduction of experimental statistics from ISTAC on holiday rentals. This new statistical operation, which has provided data on holiday rentals listed on online platforms since 2019, has complemented and enhanced the available information on tourist accommodation, particularly in this highly dynamic segment.

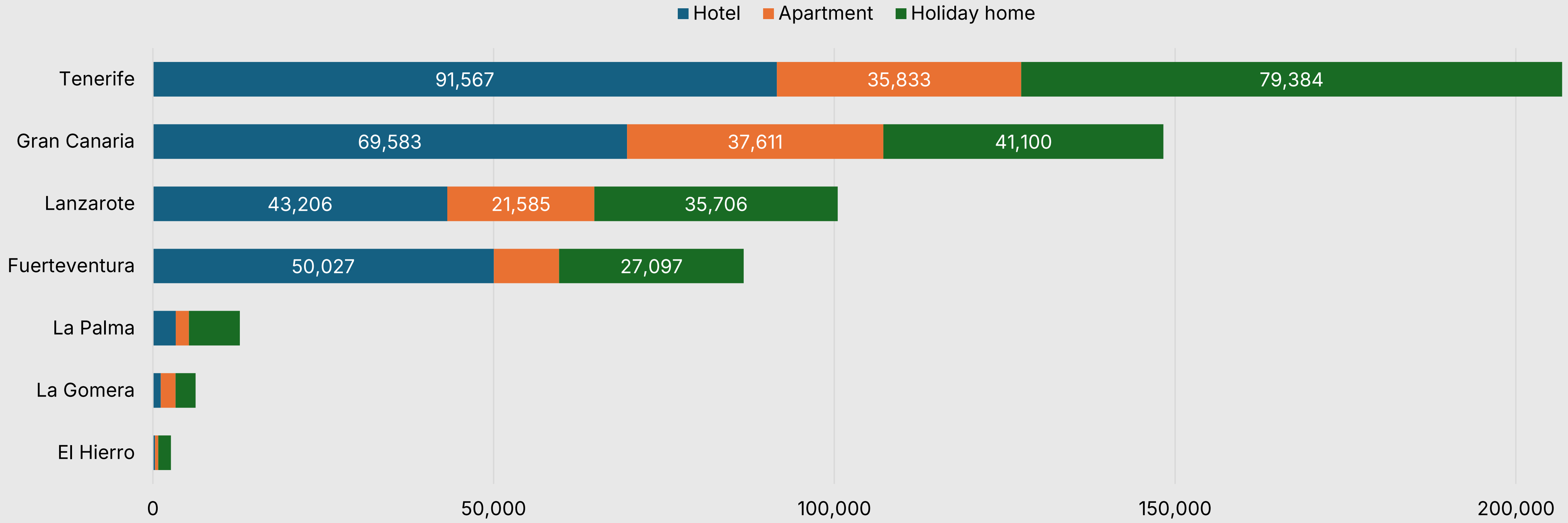
Bed places by type in the Canary Islands in 2024



Source: Tourist Accommodation Surveys, ISTAC

Tenerife is the island with the highest number of tourist accommodation places in 2024, standing out both in hotel capacity, with 91,567 beds, and in holiday rentals, which amount to 79,384 beds. In Gran Canaria, the distribution is more balanced, with 69,583 hotel beds, 41,100 in holiday rentals and 37,611 in apartments. Lanzarote and Fuerteventura show a similar trend, with a significant increase in holiday rental accommodation. This evolution in the accommodation offer in the Canary Islands reflects a transformation of the model, with a notable rise in holiday rentals and a reconfiguration of the role of hotels and apartments on the main islands.

Bed places by type of accommodation in the Canary Islands in 2024

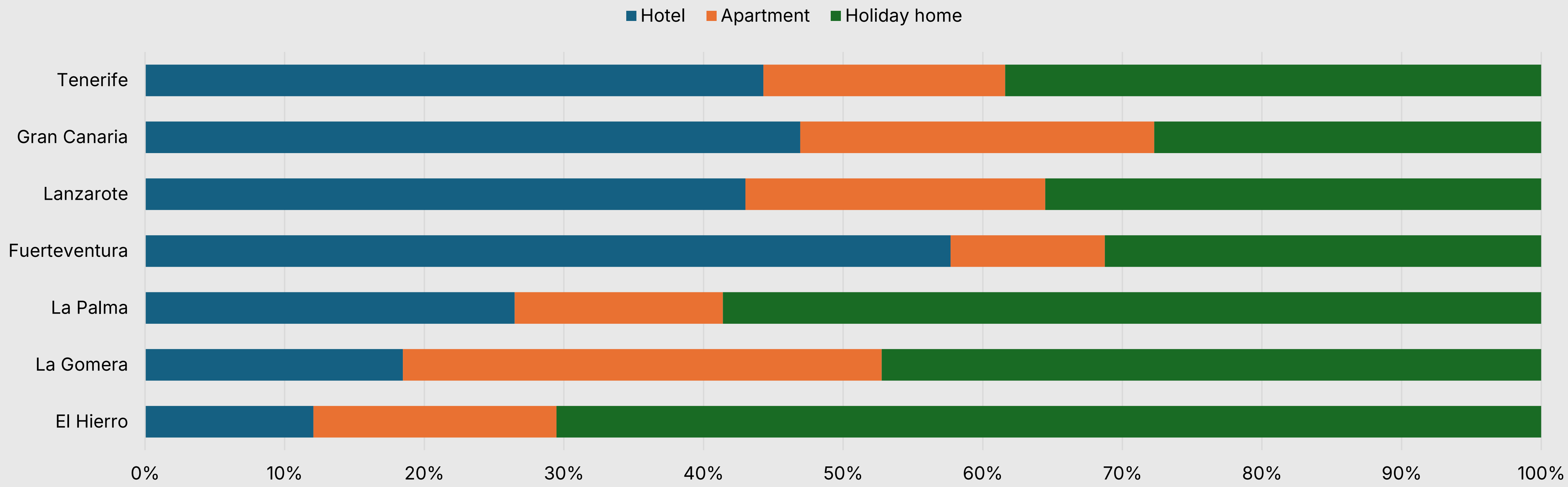


Source: Tourist Accommodation Surveys (ISTAC)

In recent years, the tourism sector in the Canary Islands has undergone a substantial shift in the distribution of its accommodation offer across the capital islands. In the model from a few decades ago, Tenerife had a higher percentage of hotel beds, while apartments were predominant in Gran Canaria. However, the faster growth of holiday rentals in Tenerife, along with a reduction in apartment capacity in Gran Canaria, largely due to their conversion into holiday rentals, has altered the landscape.

As a result, in 2024 the hotel sector represents a larger share of the accommodation supply in Gran Canaria than in Tenerife. This shift reflects a transformation of the market, with holiday rentals playing an increasingly prominent role in the tourism model. It is also worth noting the high proportion of holiday rentals in El Hierro, La Palma and, to a lesser extent, La Gomera.

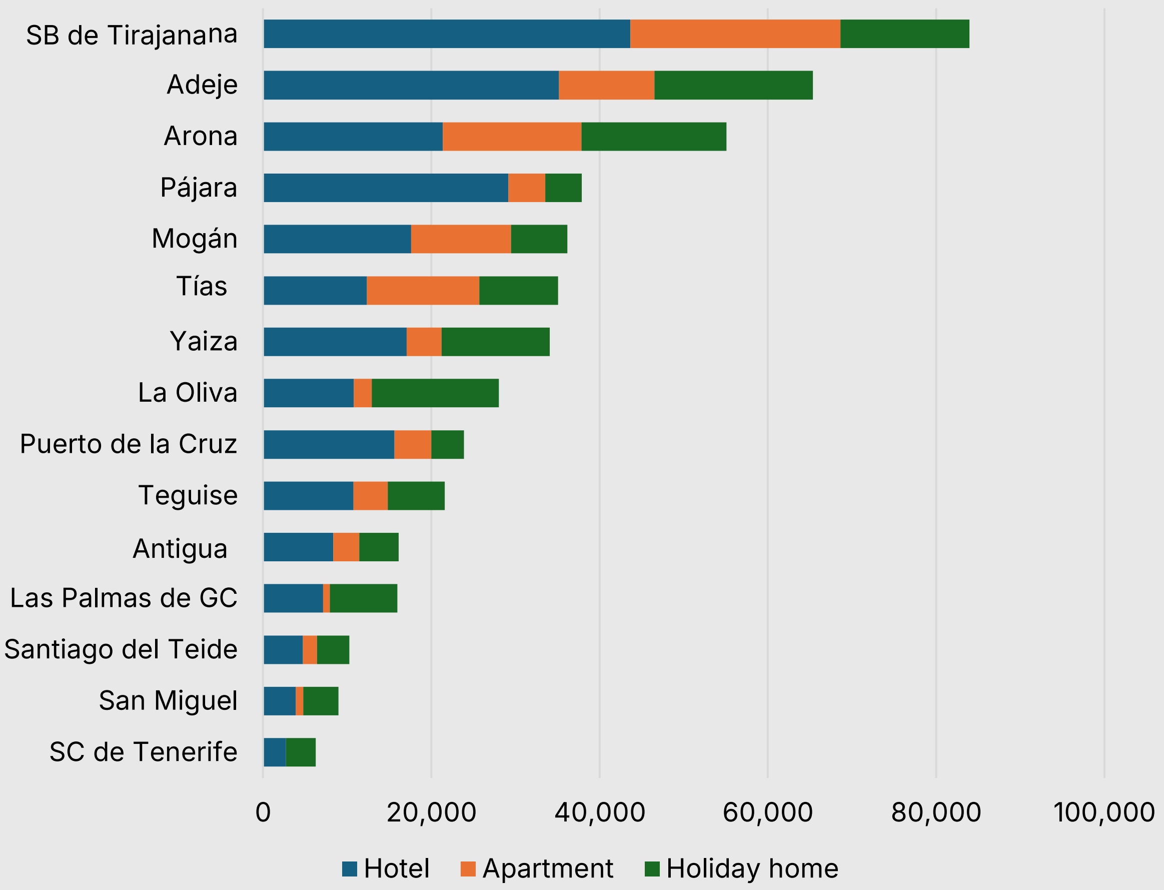
Distribution of bed places by type of accommodation in the Canary Islands in 2024



Source: Tourist Accommodation Surveys (ISTAC)

San Bartolomé de Tirajana is the municipality with the highest accommodation capacity in 2024, with more than 80,000 beds. Adeje and Arona, in Tenerife, follow in terms of the number of tourist beds. Although hotel beds remain predominant in both, there is a significant presence of holiday rentals, which in both cases exceed the number of apartment beds. Next are Pájara, Mogán, Tías and Yaiza, each with accommodation capacity ranging between 30,000 and 40,000 beds. It can be concluded that the growth of holiday rentals is a well-established phenomenon across all the islands, and in some key tourist municipalities the number of holiday rental beds now exceeds that of apartments.

Bed places by type of accommodation in the 15 municipalities of the Canary Islands with the most bed places in 2024



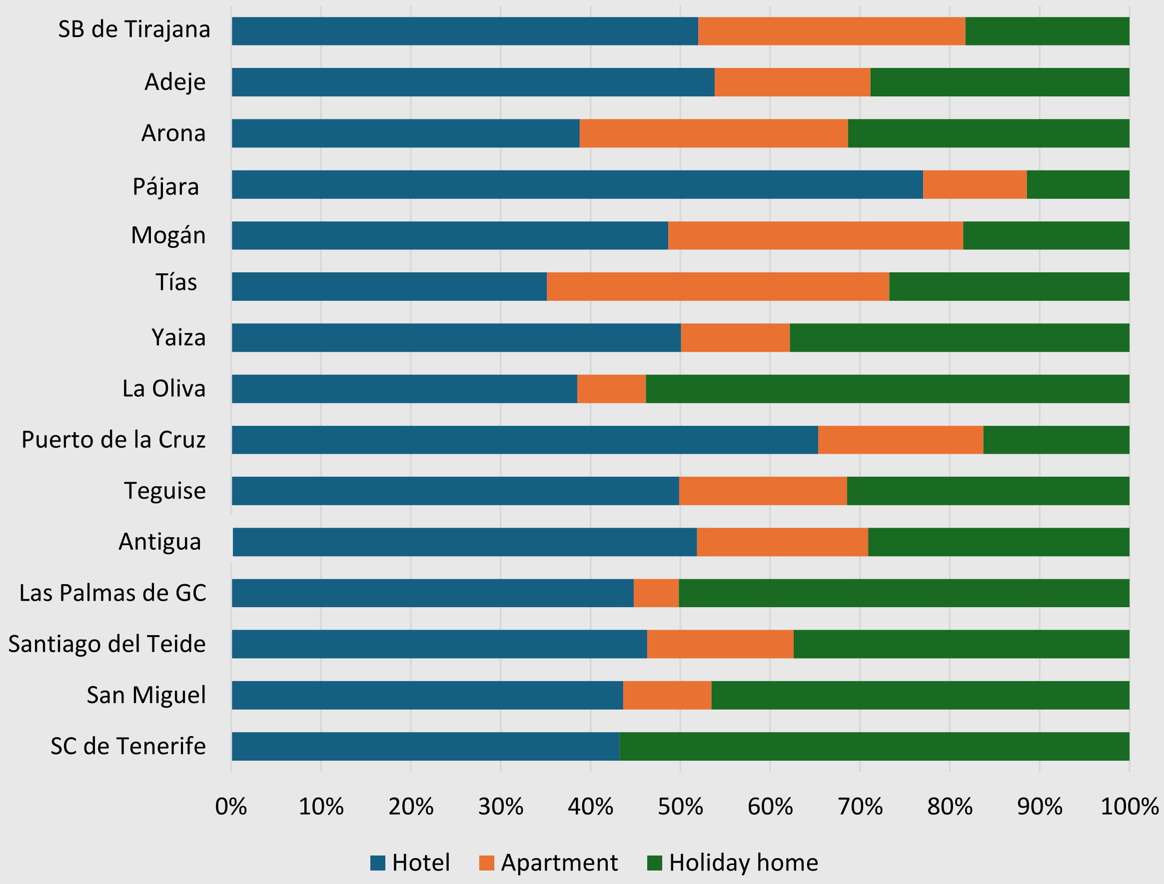
Source: Tourist Accommodation Surveys (ISTAC)

An analysis of the distribution of beds in the 15 municipalities of the Canary Islands with the highest accommodation capacity shows that, in most cases, hotel beds are predominant. Pájara has the highest percentage of hotel beds in the Canary Islands at 77.7 %, followed by Puerto de la Cruz with 66.2 %.

However, in some municipalities, holiday rentals are the most prominent type of accommodation. This is the case in Santa Cruz and La Oliva, with 54.8 % and 51.9 % respectively, which have the highest proportion of this type of lodging, followed by Las Palmas de Gran Canaria with 48.2 %. In municipalities such as San Miguel, holiday rentals also represent a significant share at 44.5 %.

Apartments are the least common accommodation type, with the exception of Tías, where they account for 38.9 % of all beds. Overall, their presence has declined across the archipelago. Finally, it is important to note that holiday rentals continue to follow a growing trend throughout the Canary Islands.

Distribution of bed places by type of accommodation in the 15 municipalities of the Canary Islands with the most bed places in 2024



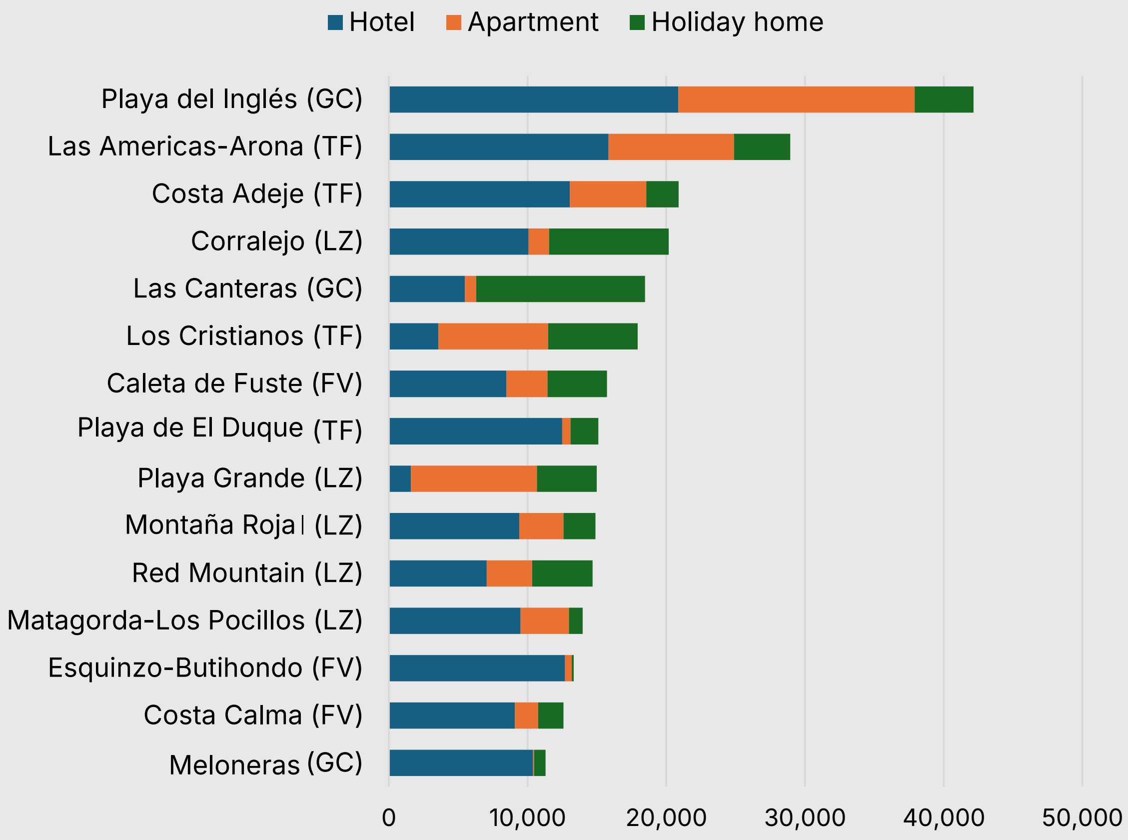
Source: Tourist Accommodation Surveys (ISTAC)

Among the main tourist hubs in the Canary Islands, Playa del Inglés in Gran Canaria has the highest accommodation capacity, with approximately 43,000 bed spaces. This destination is renowned for its extensive hotel and apartment offerings, as well as its popularity among international tourists.

In Tenerife, the areas of Las Américas-Arona and Costa Adeje rank next, establishing themselves as two of the archipelago's most significant tourist centres. These are followed by Corralejo in Lanzarote and Las Canteras in Gran Canaria, both characterised by a blend of holiday and residential tourism.

Fuerteventura also features prominently on this list, represented by three of its key tourist enclaves: Caleta de Fuste, Esquinzo-Butihondo, and Costa Calma.

Bed places by type of accommodation in the 15 micro-destinations of the Canary Islands with the most bed places in 2024



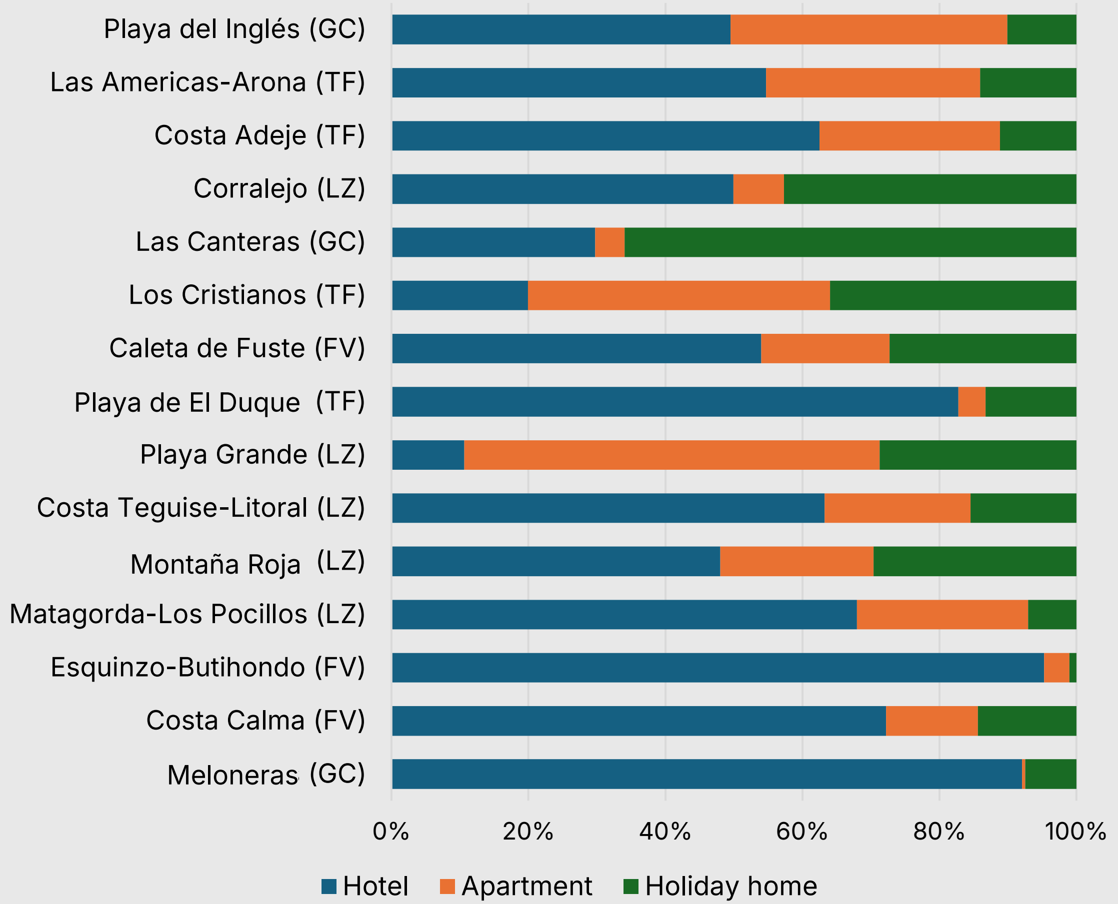
Note: TF: Tenerife; GC: Gran Canaria; FV: Fuerteventura; LZ: Lanzarote
Source: Directory of Collective Tourist Accommodation (ALOJATUR) and General Tourist Registry (Government of the Canary Islands)

As observed in the analysis of municipalities with the highest accommodation capacity, hotel bed spaces predominate in the main tourist hubs of the Canary Islands. However, at this more specific level, greater diversity in accommodation types can be seen.

For instance, in the tourist hubs of Los Cristianos in Tenerife and Playa Grande in Lanzarote, apartments are the predominant option, surpassing hotel bed spaces. This feature reflects a preference in certain destinations for more flexible accommodation models suited to longer stays.

On the other hand, despite the significant presence of short term rentals in many areas, Las Canteras in Gran Canaria is the only location where this type of accommodation surpasses others. This fact is related to the profile of visitors who choose this destination, characterised by a higher proportion of tourists seeking accommodation integrated into the urban environment.

Distribution of bed places by type of accommodation in the 15 Canary Island micro-destinations with the most bed places in 2024

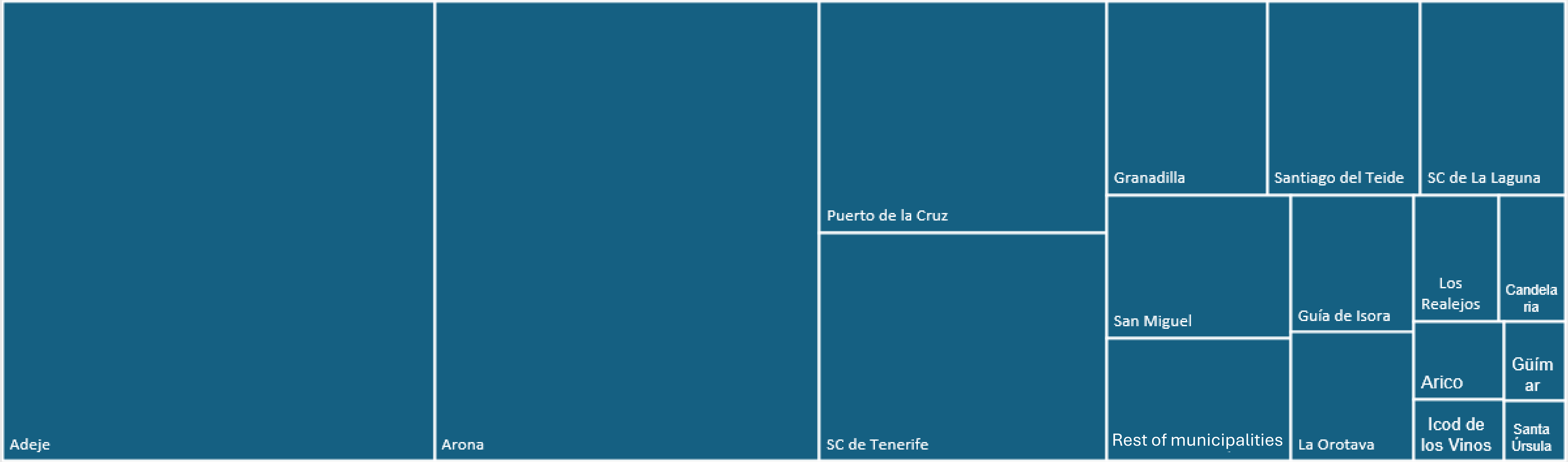


Note: TF: Tenerife; GC: Gran Canaria; FV: Fuerteventura; LZ: Lanzarote
Source: Directory of Collective Tourist Accommodation (ALOJATUR) and General Tourist Registry (Government of the Canary Islands)

Municipal distribution of tourism

Adeje and Arona stand out as the municipalities receiving the highest number of tourists in Tenerife in 2024. Puerto de la Cruz, Santa Cruz de Tenerife, and San Cristóbal de La Laguna also attract significant numbers of visitors, with the latter two strengthening their appeal. Granadilla and Santiago del Teide appear as relevant destinations, although with a lower proportion compared to the southern part of the island. Municipalities such as Guía de Isora, La Orotava, and Los Realejos have a smaller share in the tourism distribution. The measurement is based on mobile phone data analysis, providing a detailed insight into tourist mobility on the island.

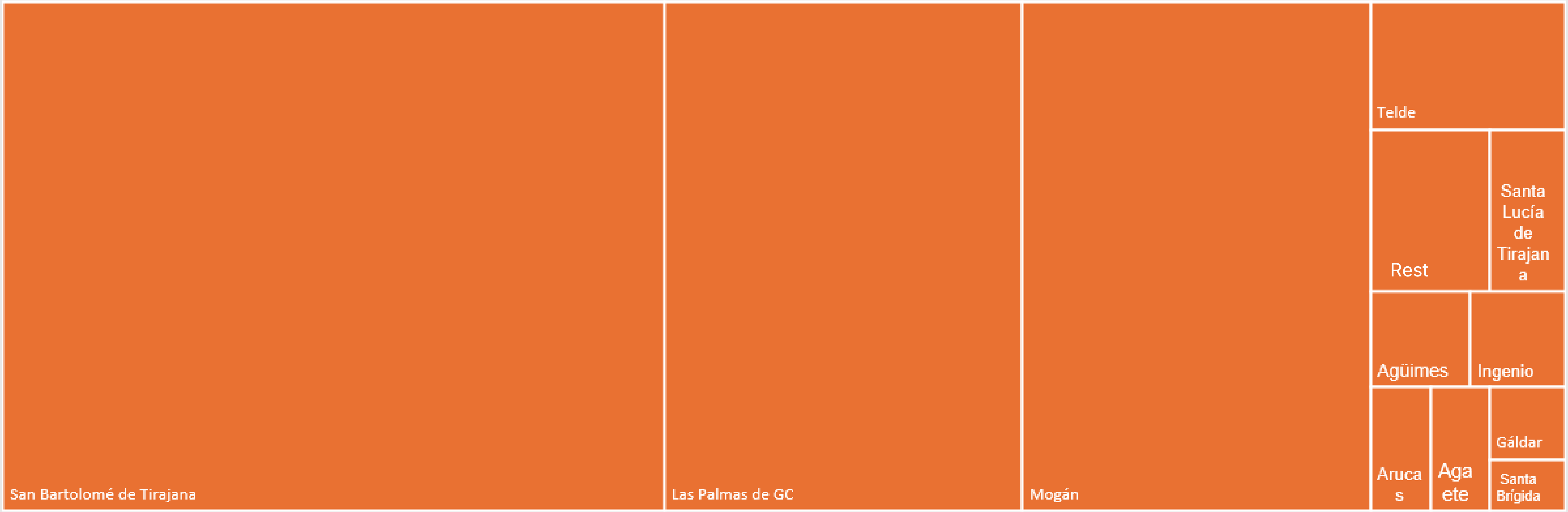
Tourists arriving in Tenerife by destination municipality in 2024



Note: International tourists and those from other provinces of Spain are included. Source: Measurement of tourism from mobile phones (INE Experimental Statistics)

San Bartolomé de Tirajana, Las Palmas de Gran Canaria, and Mogán are the municipalities that concentrate the highest number of tourist arrivals in Gran Canaria. Telde, Santa Lucía de Tirajana, and Ingenio also appear as relevant municipalities in the distribution of tourist flows. The measurement is based on mobile phone data analysis, providing a detailed insight into tourist mobility across the island. As in Tenerife, tourism in Gran Canaria remains largely concentrated in the southern part of the island, although the capital city ranks second in terms of arrivals.

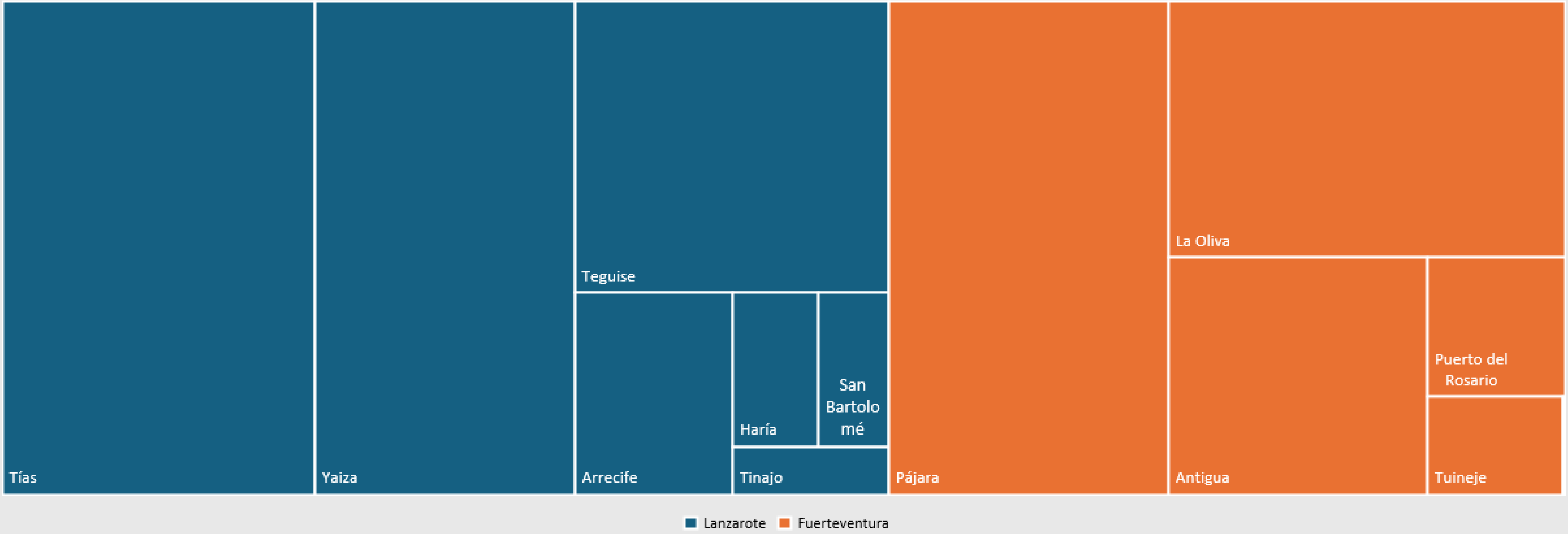
Tourists arriving in Gran Canaria by destination municipality in 2024



Note: International tourists and those from other provinces are included. Source: Measurement of tourism from mobile phones (INE Experimental Statistics)

In Lanzarote, the municipalities receiving the highest number of tourists in 2024 are Tías and Yaiza, followed by Teguise and Arrecife, reflecting the concentration of tourism in the main coastal and accommodation areas. Haría and Tinajo receive fewer visitors. In Fuerteventura, Pájara and La Oliva stand out as the municipalities with the highest number of tourist arrivals, followed by Antigua and Puerto del Rosario. Tuineje receives a smaller share of visitors compared to the former.

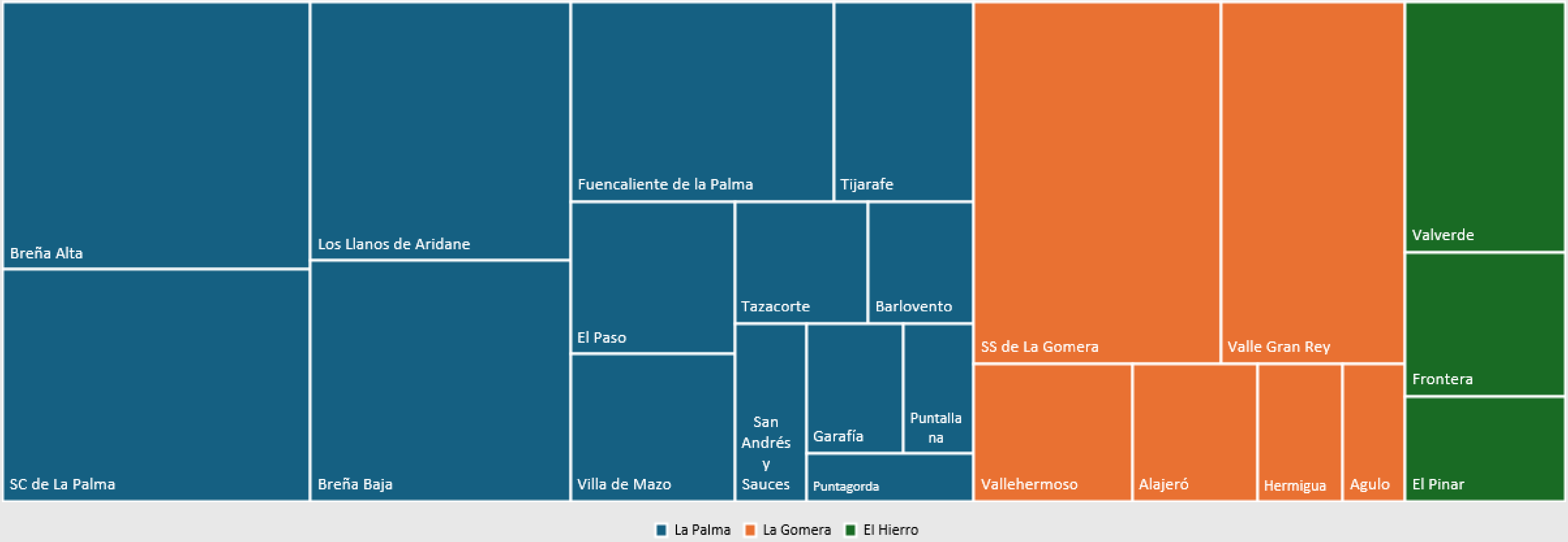
Tourists arriving in Lanzarote and Fuerteventura by destination municipality in 2024



Note: International tourists and those from other provinces are included. Source: Measurement of tourism from mobile phones (INE Experimental Statistics)

In La Palma, the municipalities receiving the highest number of tourists in 2024 are Breña Alta, Santa Cruz de La Palma, Los Llanos de Aridane, Breña Baja and Fuencaliente. In La Gomera, San Sebastián de La Gomera and Valle Gran Rey are the main tourist destinations. In El Hierro, Valverde leads in visitor numbers. The chart shows that the municipal distribution of tourists in La Palma and El Hierro follows a more balanced pattern. In contrast, La Gomera follows the trend of the more touristic islands, where a few municipalities concentrate most of the activity.

Tourists arriving in La Palma, La Gomera and El Hierro by destination municipality in 2024



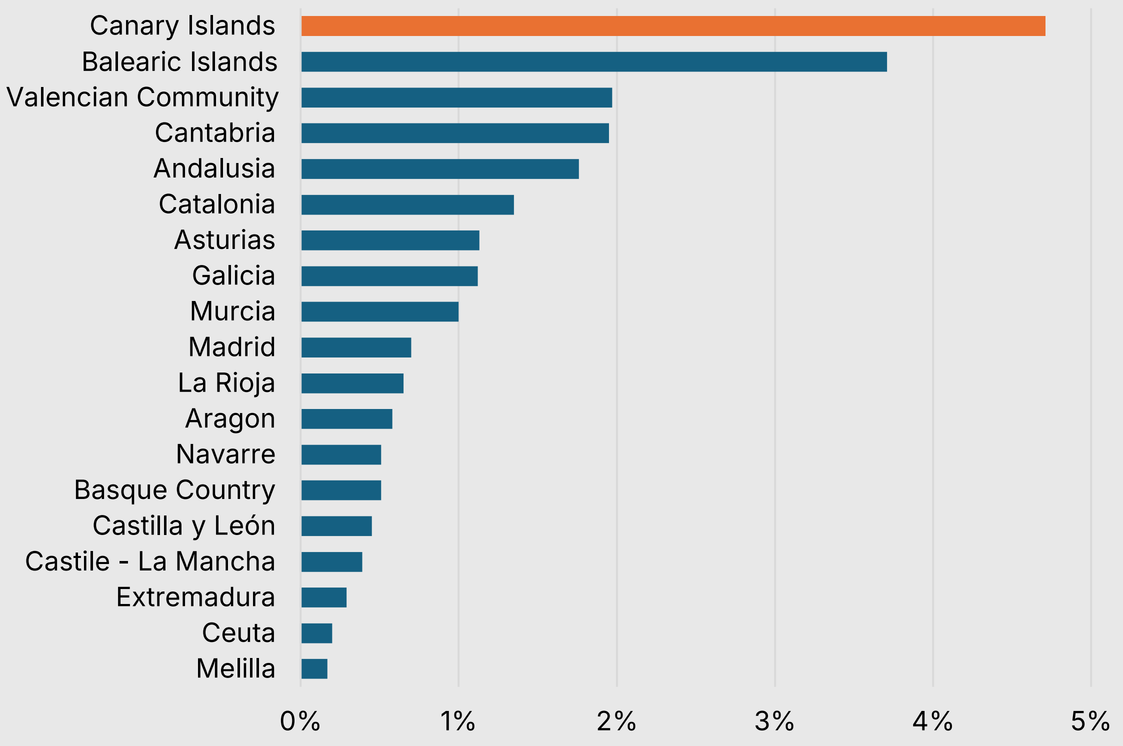
Note: International tourists and those from other provinces are included. Source: Measurement of tourism from mobile phones (INE Experimental Statistics)

Analysis of short-term rentals for tourist use

The Canary Islands is the autonomous community with the highest percentage of holiday rentals in relation to the total number of registered dwellings as of November 2024, closely followed by the Balearic Islands. These two regions, which are highly dependent on tourism, show a strong presence of this type of accommodation compared to the available housing stock.

The Valencian Community, Cantabria and Andalusia also present a high proportion of holiday rentals, highlighting the importance of the sector in these coastal and tourist areas. In contrast, regions such as Castilla-La Mancha, Extremadura, Ceuta and Melilla show the lowest values, reflecting a lesser impact of holiday rentals on their housing markets. These data underscore the weight of tourism-related use in the residential supply of the Canary and Balearic Islands, where the growth of holiday rentals has generated both economic opportunities and challenges in regulating access to housing.

Percentage of short-term rentals out of the total number of homes registered by autonomous communities (November 2024)



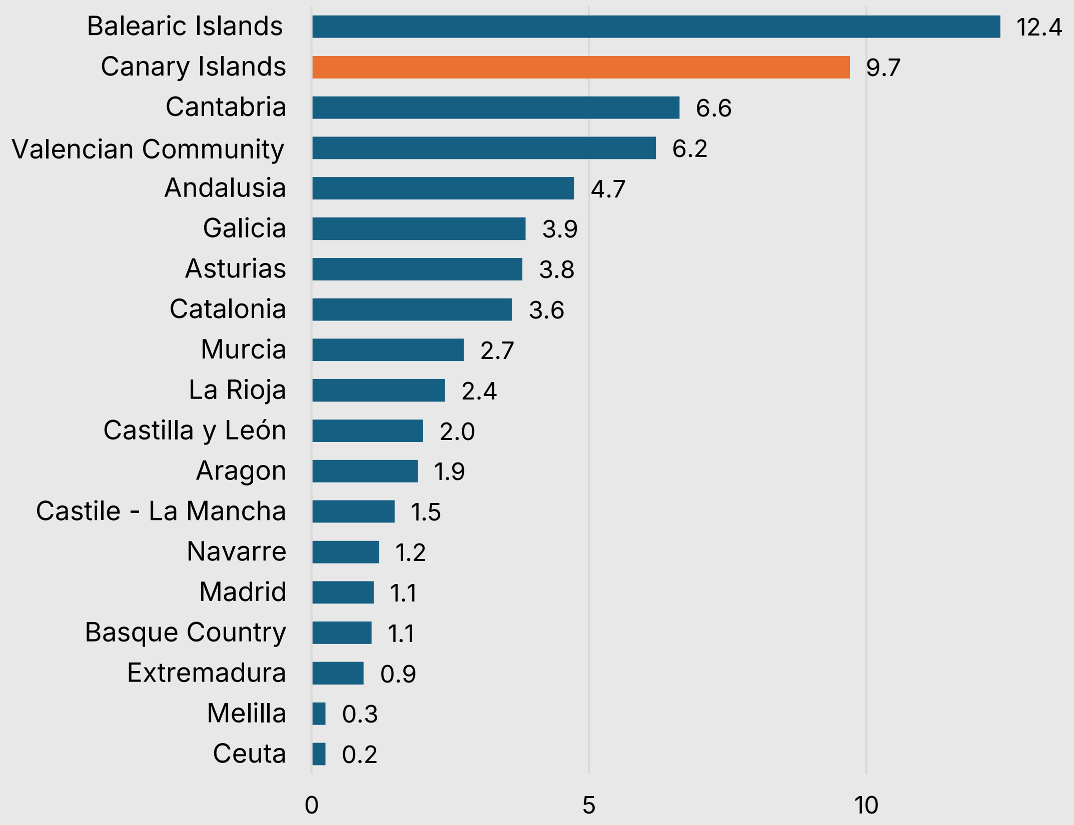
Note: The source used compares the 2024 tourist housing data with the 2021 Housing Census
Source: Measurement of the number of tourist dwellings in Spain and their capacity (INE experimental statistics)

The Balearic Islands and the Canary Islands show the highest ratios of holiday rental places per 100 inhabitants in November 2024, with 12.4 and 9.7 places, respectively.

These figures reflect the strong presence of holiday rentals in these highly touristic regions, where the supply of visitor-oriented accommodation represents a significant proportion relative to the resident population.

Cantabria, the Valencian Community and Andalusia also record high values, exceeding the national average. In contrast, regions such as Castilla-La Mancha, Extremadura, Ceuta and Melilla show the lowest ratios, highlighting a lower incidence of holiday rentals in their housing markets.

Ratio of holiday home places per 100 inhabitants by autonomous community (November 2024)



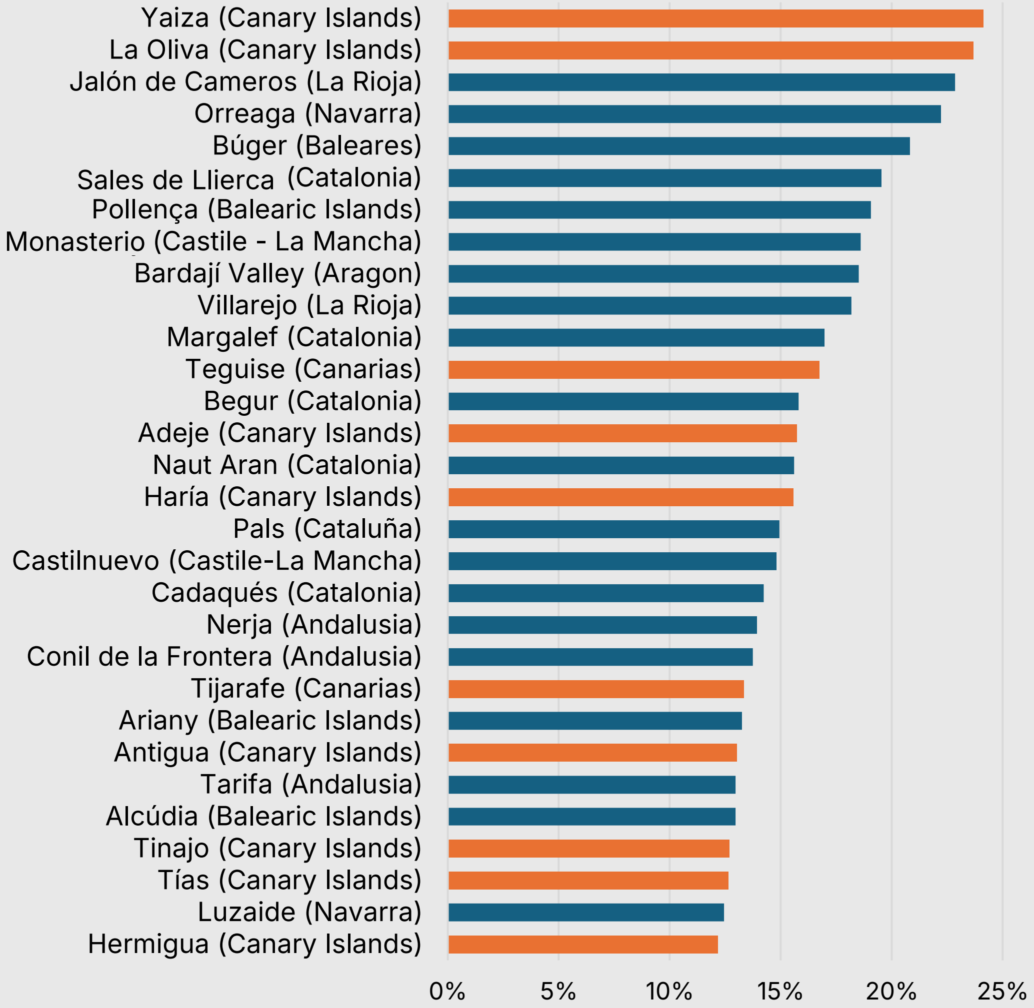
Source: Measurement of the number of tourist homes in Spain and their capacity (Experimental Statistics, INE) and Continuous Population Statistics (INE, January 2024)

Yaiza and La Oliva, in the Canary Islands, are the municipalities with the highest percentage of holiday rentals in relation to the total number of registered dwellings in November 2024, across all 8,125 municipalities in Spain. It is worth noting that the month of November, selected by the INE, marks the beginning of the high season in the Canary Islands, unlike in most mainland municipalities. In the case of Yaiza, holiday rentals represented 24.1% of the total housing stock, while in La Oliva the figure was 23.7%.

Other municipalities in the Canary Islands that stand out include Teguise, Adeje, Haría, Tijarafe, Tinajo, Tías and Hermigua, confirming the significant presence of holiday rentals throughout the archipelago.

Municipalities in the Balearic Islands, such as Pollença, Búger and Alcudia, also report high percentages, reflecting a similar phenomenon to that of the Canary Islands, although in the Balearic Islands the offer is more concentrated during the summer season.

Percentage of short-term rentals out of the total number of registered dwellings in 30 municipalities with the highest percentage (November 2024)



Note: The source used compares the 2024 tourist housing data with the 2021 Housing Census. Source: Measurement of the number of tourist dwellings in Spain and their capacity (INE experimental statistics)

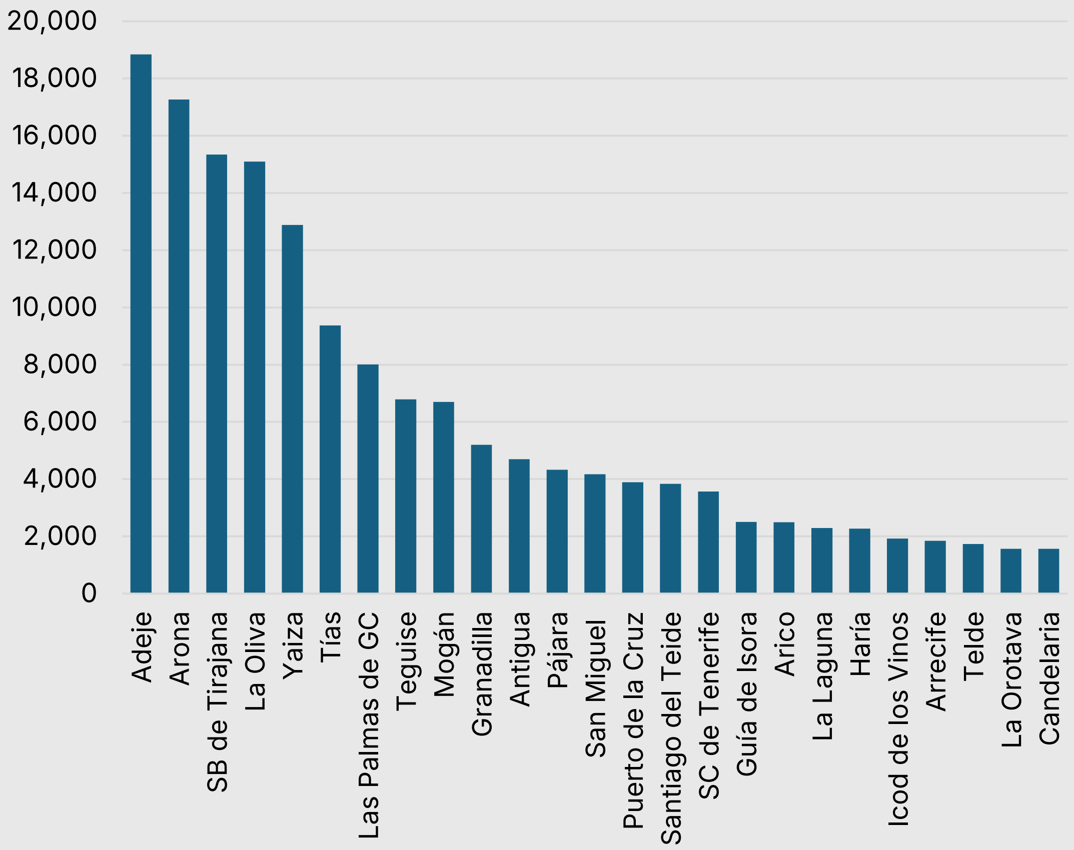
Adeje and Arona lead the list of municipalities with the highest number of holiday rental places in the Canary Islands in 2024, with figures exceeding 18,000 and 16,000 places, respectively. San Bartolomé de Tirajana and La Oliva also stand out with high values, reflecting the strong presence of holiday rentals in well-established tourist destinations.

In the case of Lanzarote, Yaiza and Tías also rank among the municipalities with the highest number of places, confirming the importance of this type of accommodation on the island.

In Gran Canaria, in addition to the aforementioned case of San Bartolomé de Tirajana, the city of Las Palmas de Gran Canaria records very high figures, with a concentration in the area near Las Canteras Beach.

These data reflect the expansion of holiday rentals throughout the archipelago, which continues to consolidate as a key alternative in the Canary Islands' tourism sector, with Adeje, Arona, San Bartolomé de Tirajana and La Oliva at the forefront. The trend points towards a progressive expansion.

Short-term rental beds in the 25 municipalities of the Canary Islands with the most holiday home beds in 2024

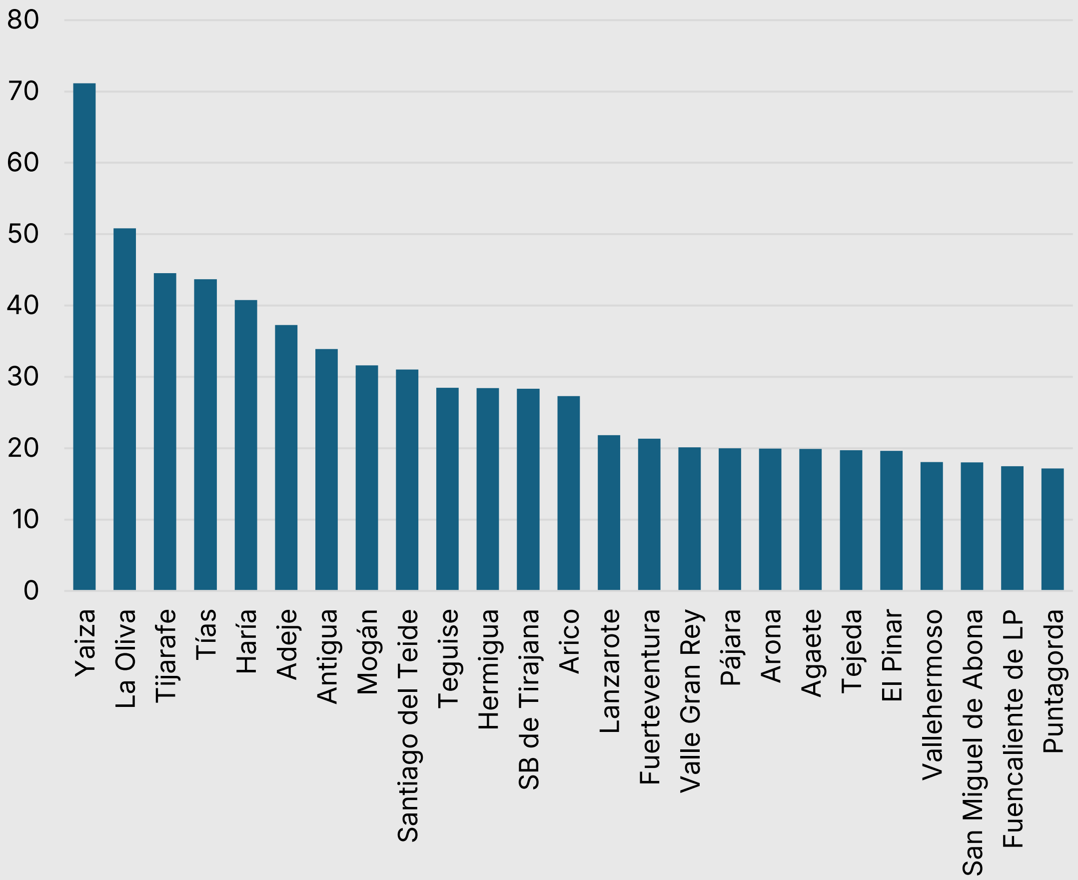


Source: Tourist Accommodation Survey (ISTAC)

Yaiza and La Oliva are the municipalities with the highest ratio of holiday rental places per 100 inhabitants in the Canary Islands in 2024, clearly standing out with values above 50. These figures reflect the strong presence of holiday rentals in these tourism-dependent localities.

Other municipalities with a high proportion of holiday rental places include Tijarafe, Tías, Haría and Adeje, all with ratios exceeding 30, indicating a significant impact of the sector on their residential fabric. Mogán, Santiago del Teide and Teguise also show notable values, highlighting the growing weight of holiday rentals across different areas of the archipelago.

Ratio of short-term rental beds per 100 inhabitants in the 25 municipalities of the Canary Islands with the highest ratio in 2024



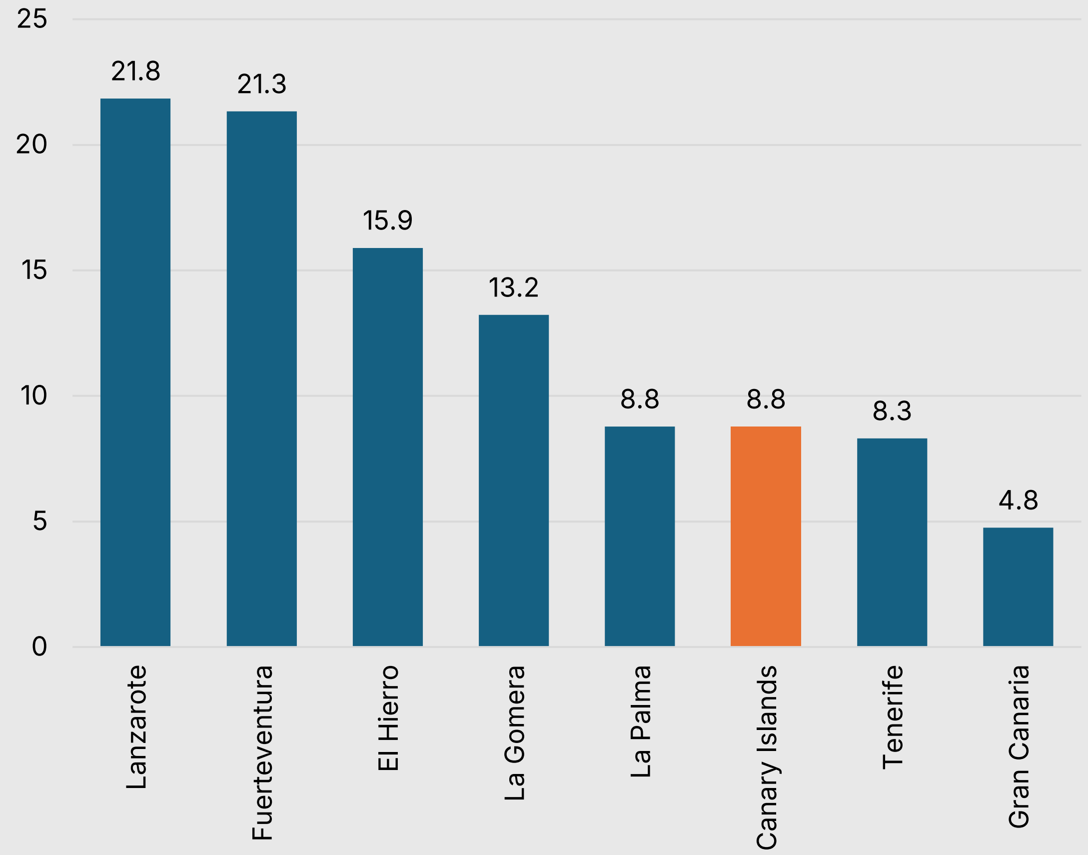
Source: Tourist Accommodation Survey (ISTAC) and Official Population Figures (ISTAC, 2024)

Lanzarote and Fuerteventura recorded the highest ratios of holiday rental places per 100 inhabitants in the Canary Islands in 2024, with 21.8 and 21.3 respectively, reflecting the significant presence of this type of accommodation relative to their populations.

El Hierro and La Gomera also show elevated values, with 15.9 and 13.2 places per 100 inhabitants, suggesting a considerable reliance on holiday rentals in islands with smaller populations or less developed hotel infrastructure.

The Canary Islands average stands at 8.8 places per 100 inhabitants, the same as La Palma and higher than Tenerife (8.3) and Gran Canaria (4.8), which register the lowest figures. This indicates that, while holiday rentals have grown across all islands, their impact is significantly greater in smaller territories with a stronger orientation towards non-hotel tourism.

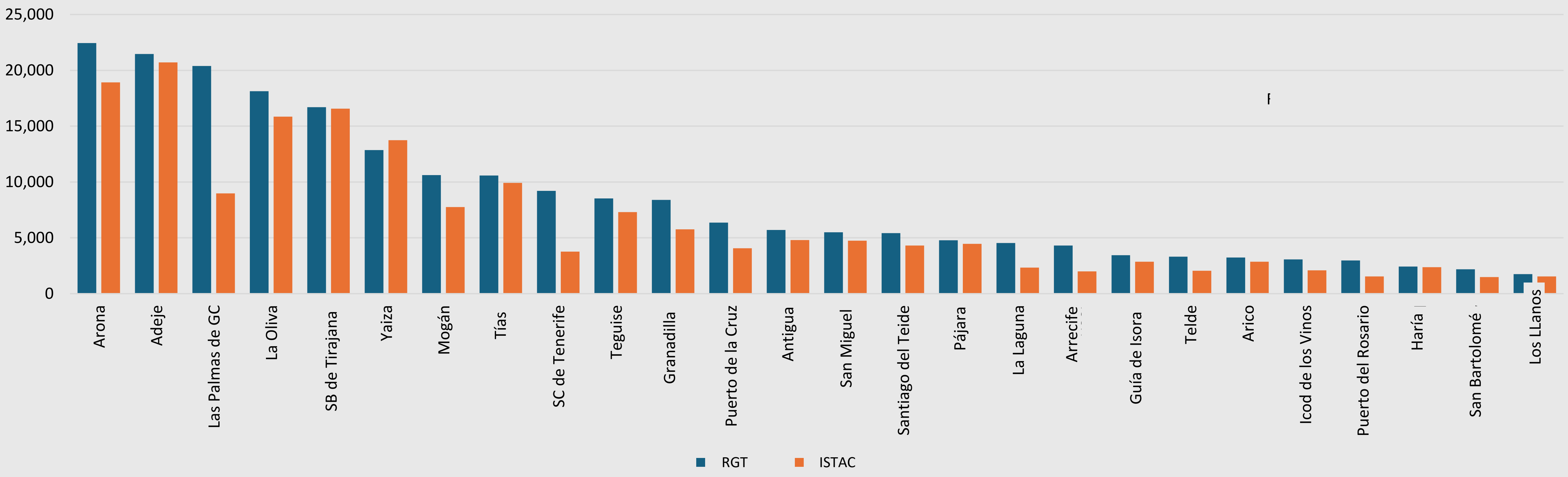
Ratio of short-term rental beds per 100 inhabitants in the Canary Islands in 2024



Source: Tourist Accommodation Survey (ISTAC) and Official Population Figures (ISTAC, 2024)

The chart compares the number of holiday rental places according to two sources: the General Tourism Register (RGT) and the figures provided by ISTAC through web scraping, broken down by municipality. Although there is some correlation between both sources, in certain tourist municipalities such as Arona, Las Palmas de GC, Mogán and Santa Cruz de Tenerife, significant discrepancies are observed, with ISTAC figures, reflecting the fact that the number of holiday homes actually marketed is lower than those in the General Tourism Register. In contrast, some municipalities like Yaiza show a higher number of holiday rentals on the market than those officially registered.

Short-term rental beds by municipality: comparison of the RGT and the Accommodation Survey (ISTAC) in December 2024



Source: General Tourist Registry (RGT) (Government of the Canary Islands) and Tourist Accommodation Survey (ISTAC)

Some characteristics of tourist accommodation

By islands, Fuerteventura has the highest concentration of holiday rentals within its tourist hubs, with 67.8% located in micro-destinations and 86.1% in municipalities containing micro-destinations, indicating a strong centralisation of tourist accommodation in specific areas. Lanzarote and Gran Canaria also show high values, with over 75% of their holiday rentals located within municipalities that include recognised micro-destinations (tourist hubs) according to ISTAC. In Tenerife, the distribution is somewhat more dispersed, with 52.3% of holiday rentals situated within micro-destinations and 67.9% within tourist municipalities, suggesting a greater geographical diversification of holiday accommodation compared to other islands.

Distribution of short-term rentals in the Canary Islands according to the distance to the micro-destinations and municipalities (December, 2024)

	Total		Inside the micro-destination		By micro-destination or less than 500m away		By micro-destination or less than 1Km away		By micro-destination or less than 2Km away		By micro-destination or less than 5Km away		Municipalities with micro-destinations	
	HH	Beds	HH	Beds	HH	Beds	HH	Beds	HH	Beds	HH	Beds	HH	Beds
Tenerife	23.206	95.965	52,3%	47,8%	54,6%	50,6%	55,9%	52,1%	59,5%	56,2%	70,2%	67,7%	67,99%	65,20%
Gran Canaria	12.866	55.085	62,1%	55,4%	65,5%	59,4%	66,1%	60,4%	67,8%	62,2%	73,9%	69,3%	76,15%	72,42%
Lanzarote	7.995	35.647	59,6%	56,8%	60,1%	57,4%	60,7%	58,3%	62,3%	60,5%	79,9%	78,3%	75,97%	75,99%
Fuerteventura	6.953	28.418	67,8%	63,9%	67,9%	64,2%	69,2%	65,3%	73,0%	69,4%	74,5%	71,4%	86,11%	85,46%
Canary Islands	54.146	226.399	54,7%	50,7%	56,5%	53,0%	57,5%	54,2%	60,2%	57,2%	69,0%	66,9%	69,51%	67,95%

Note: The table represents the short term rentals (holiday homes, HH) that are within the tourist centres or close to them. The data for La Palma, La Gomera and El Hierro have not been included because they do not have micro-destinations recognised by ISTAC. Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

Most holiday rentals in the Canary Islands are located near the coast, reflecting their strong connection to sun and beach tourism. Across the archipelago, 55.3% of holiday rentals are within 500 metres of the coast, increasing to 71.2% within 1 km and reaching 83.3% within 2 km. Among the islands, Tenerife, Lanzarote and Fuerteventura stand out with the highest percentages of holiday rentals near the coastline, with over 86% located within 2 km of the shore. Gran Canaria shows a similar pattern, although with a slightly less concentrated distribution within the first 500 metres. In the non-capital islands, such as La Palma, La Gomera and El Hierro, the distribution of holiday rentals is more dispersed, with lower values near the sea.

Distribution of short-term rentals in the Canary Islands according to distance from the coast (December, 2024)

	Total		Less than 500m		Less than 1Km		Less than 2Km	
	HH	Beds	HH	Beds	HH	Beds	HH	Beds
Tenerife	23,206	95,965	74.4%	69.7%	86.0%	83.1%	94.2%	93.0%
Gran Canaria	12,866	55,085	82.9%	78.7%	90.1%	87.1%	94.2%	92.6%
Lanzarote	7,995	35,647	87.7%	84.0%	95.2%	93.8%	100.0%	100.0%
Fuerteventura	6,953	28,418	93.2%	91.1%	98.8%	98.5%	100.0%	100.0%
La Palma	1,562	5,928	32.8%	31.4%	44.7%	42.9%	77.6%	76.8%
La Gomera	1,033	3,510	54.2%	52.3%	79.3%	77.2%	92.3%	91.1%
El Hierro	531	1,846	46.9%	46.2%	60.3%	59.8%	79.3%	80.2%
Canary Islands	54,146	226,399	78.9%	75.3%	88.4%	86.4%	95.2%	94.3%

Note: The short term rentals (holiday homes, HH) are represented in the table according to the distance to the coast in a straight line. Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

The distribution of holiday rentals in the Canary Islands by altitude shows a clear concentration in low-lying areas. Overall, 78.9% of holiday rentals are located below 100 metres above sea level, rising to 88.4% below 250 metres and reaching 95.2% below 500 metres. It is important to note that these figures are influenced by the islands' topography. In any case, the situation in La Palma is particularly noteworthy, with nearly a quarter of holiday rental places located at altitudes above 500 metres above sea level.

Distribution of short-term rentals in the Canary Islands according to height above sea level (December, 2024)

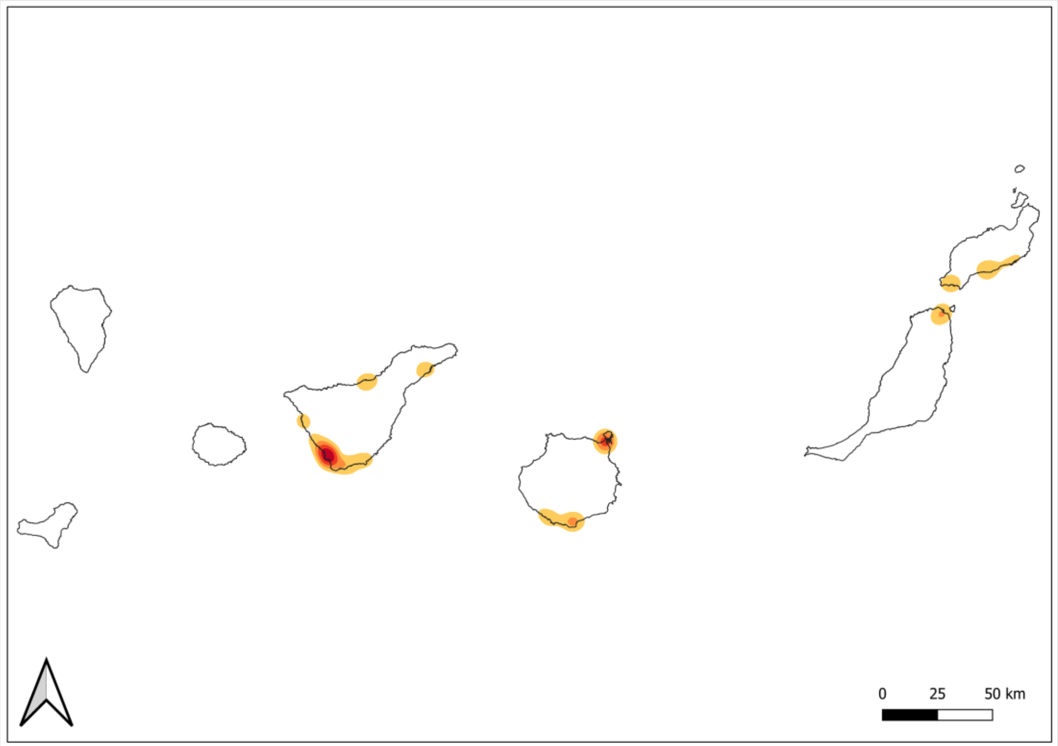
	Total		Below 100m in altitude		Below 250m in altitude		Below 500m in altitude	
	HH	Beds	HH	Beds	HH	Beds	HH	Beds
Tenerife	23,206	95,965	74.4%	69.7%	86.0%	83.1%	94.2%	93.0%
Gran Canaria	12,866	55,085	82.9%	78.7%	90.1%	87.1%	94.2%	92.6%
Lanzarote	7,995	35,647	87.7%	84.0%	95.2%	93.8%	100.0%	100.0%
Fuerteventura	6,953	28,418	93.2%	91.1%	98.8%	98.5%	100.0%	100.0%
La Palma	1,562	5,928	32.8%	31.4%	44.7%	42.9%	77.6%	76.8%
La Gomera	1,033	3,510	54.2%	52.3%	79.3%	77.2%	92.3%	91.1%
El Hierro	531	1,846	46.9%	46.2%	60.3%	59.8%	79.3%	80.2%
Canary Islands	54,146	226,399	78.9%	75.3%	88.4%	86.4%	95.2%	94.3%

Note: The table represents short term rentals (holiday homes, HH) that are below X meters in altitude. Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

Concentration of short-term rentals

The heat map of holiday rentals in the Canary Islands shows a high concentration of this type of accommodation in the archipelago's main tourist areas. The most intense hotspots are located in Tenerife (Adeje, Arona, Puerto de La Cruz and Santa Cruz de Tenerife), Gran Canaria (San Bartolomé de Tirajana, Las Palmas de Gran Canaria and Mogán), Lanzarote (Yaiza, Tías and Teguise), and Fuerteventura (La Oliva and Pájara). This confirms that the areas with the highest intensity correspond to the most consolidated and prominent micro-destinations, where the supply of holiday rentals has grown significantly in recent years.

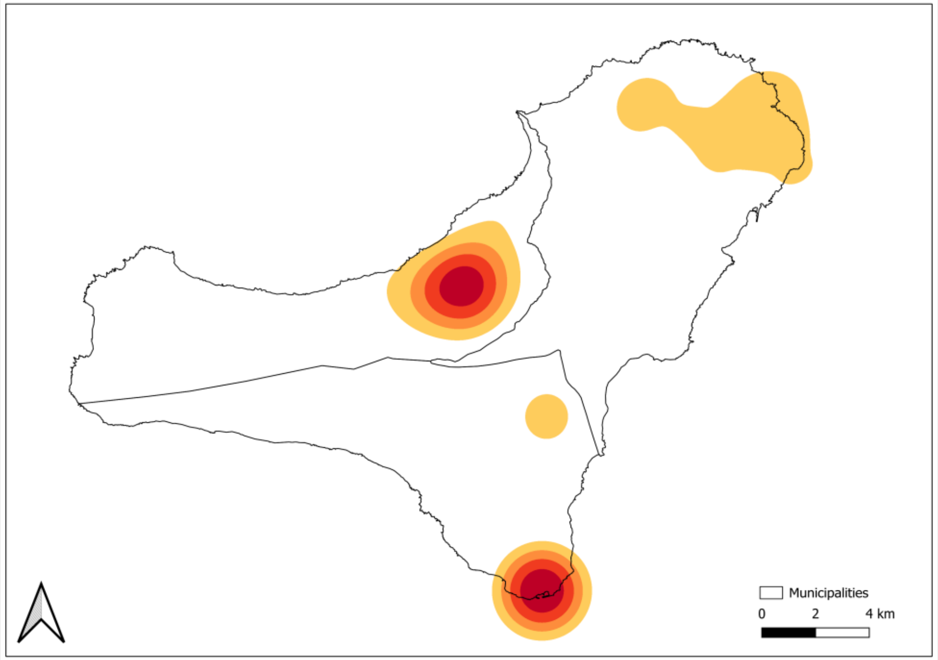
Heat map of short-term rentals in the Canary Islands



Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

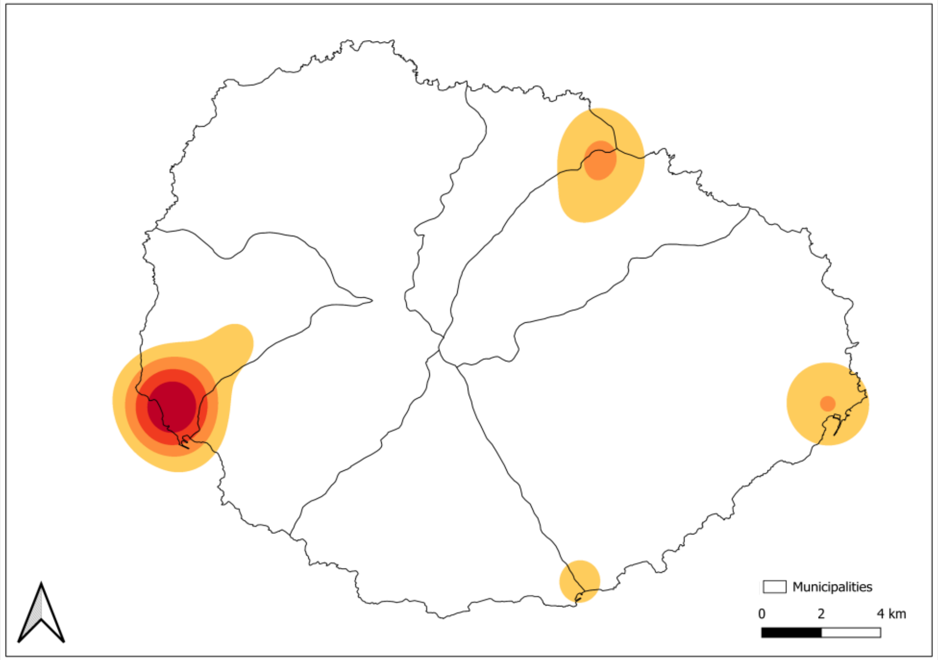
Focusing on smaller islands such as El Hierro and La Gomera, holiday rentals tend to cluster around the most representative areas of each. In El Hierro, the villages of La Restinga and La Frontera concentrate the majority of this type of accommodation, while in La Gomera, Valle Gran Rey, Agulo and San Sebastián de La Gomera stand out. This accommodation model plays a key role on smaller islands, where the lodging offer is limited, as it diversifies visitor options and contributes to a more balanced territorial distribution of tourism.

Heat map of short-term rentals in El Hierro



Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

Heat map of short-term rentals in La Gomera

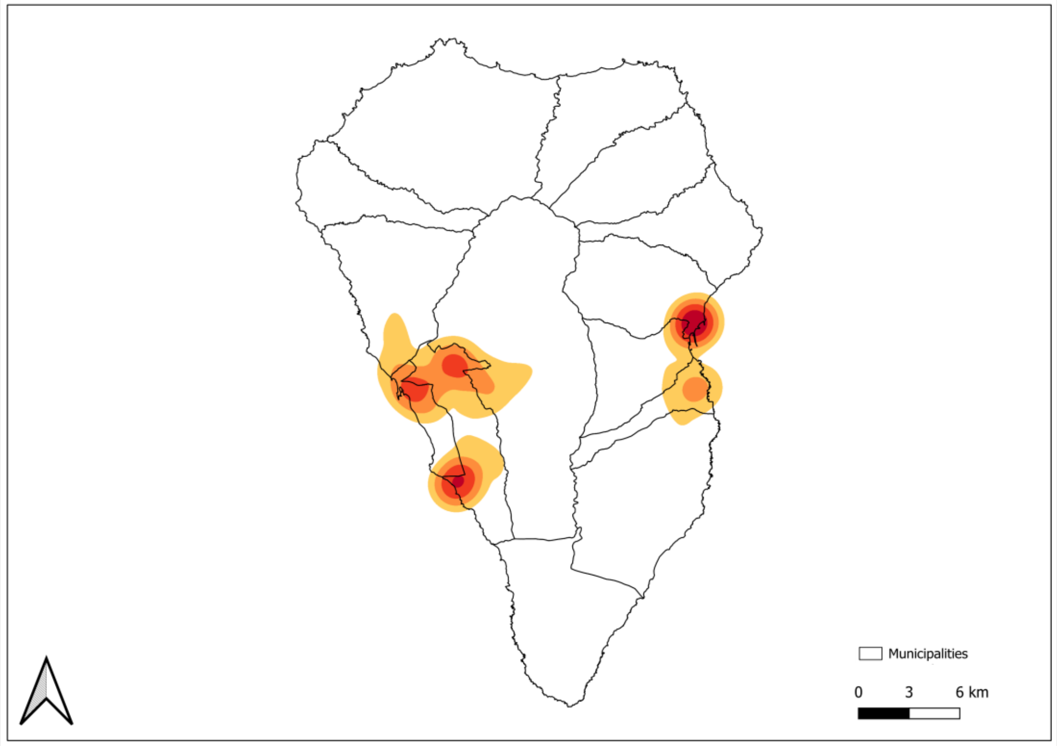


Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

Holiday rentals in La Palma are mainly concentrated along the island's eastern and western coasts. Santa Cruz de La Palma, the capital, is the area with the highest number of this type of accommodation. In addition, Los Cancajos, Tazacorte and Los Llanos de Aridane also stand out as areas with a significant presence of holiday rentals.

Lastly, in the case of Puerto Naos, although there is a high number of registered holiday rentals, many of them may currently be out of use due to the impact of the Tajogaite volcanic eruption.

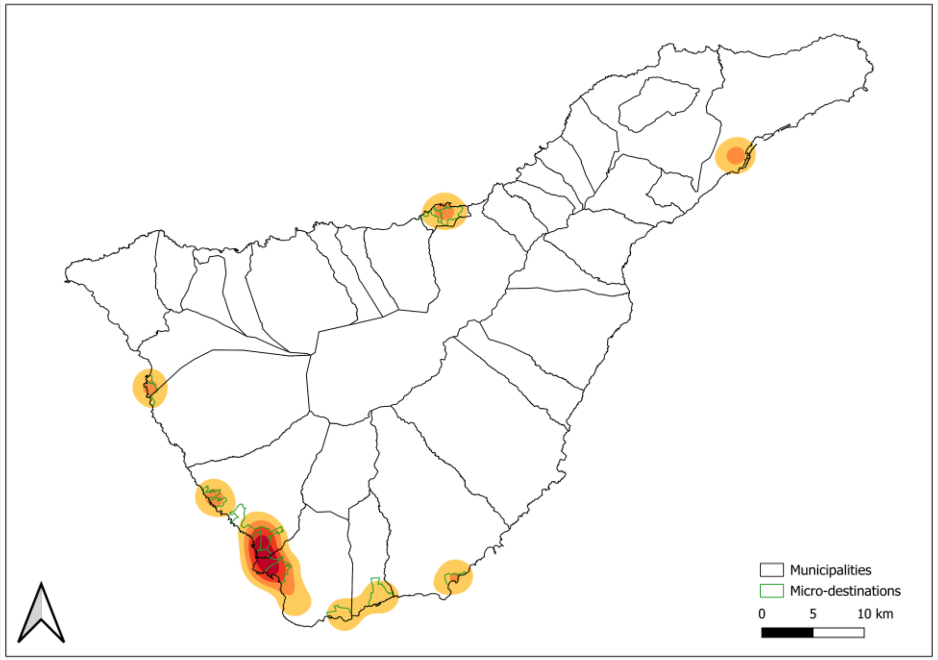
Heat map of short-term rentals in La Palma



Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

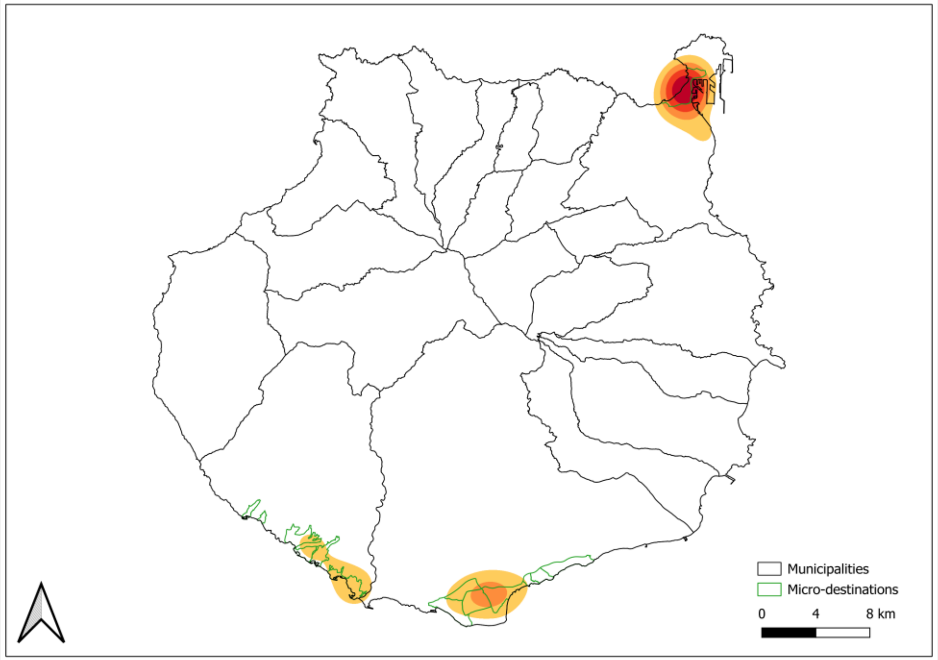
Tenerife and Gran Canaria are the islands with the highest concentration of holiday rentals in the archipelago. Moreover, this type of accommodation is clearly clustered around the main tourist hubs and their surroundings, as well as in the island capitals. This analysis highlights that, although holiday rentals contribute to a broader territorial distribution of accommodation options, they remain predominant in areas with a high concentration of traditional lodging. This is because these locations represent strategic and high-demand spots for tourists.

Heat map of short-term rentals in Tenerife



Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

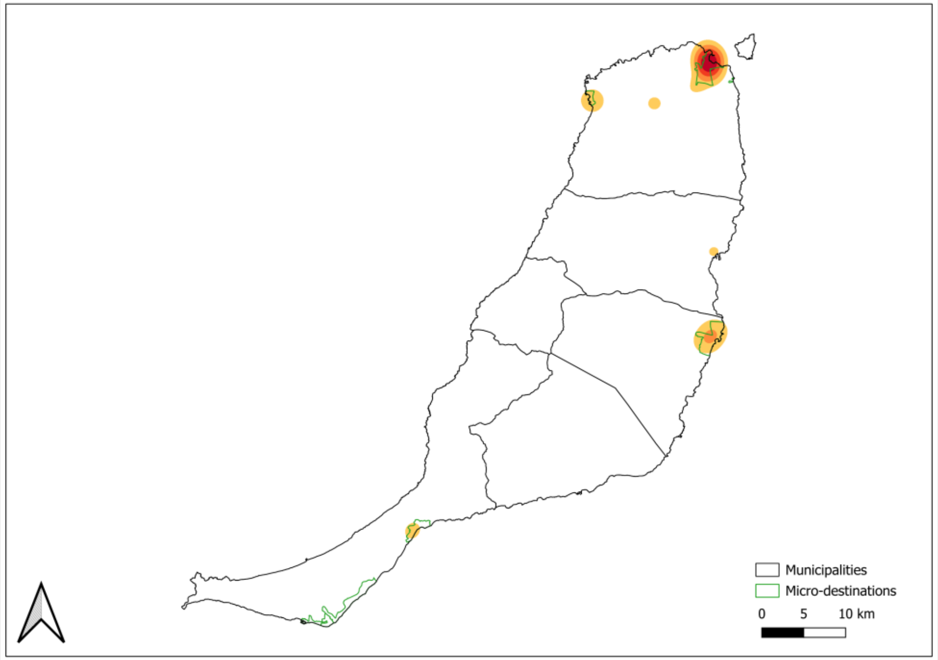
Heat map of short-term rentals in Gran Canaria



Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

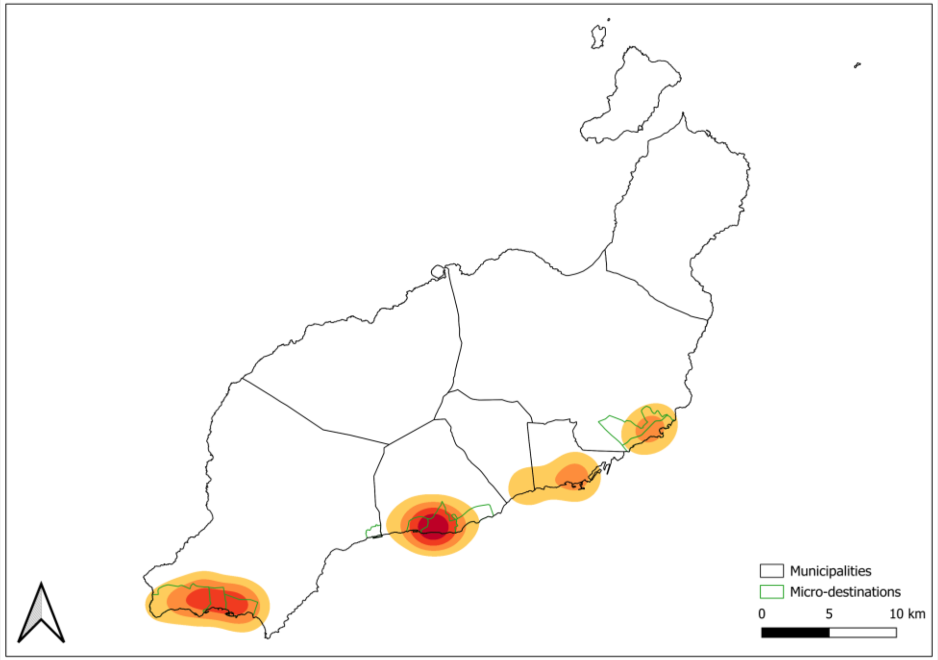
In Fuerteventura, the supply is heavily concentrated in the municipality of La Oliva, particularly in Corralejo. Significant clusters are also observed in Puerto del Rosario and Costa Calma. Lanzarote, meanwhile, concentrates its holiday rental offer in the southeastern part of the island, centred around the main tourist hubs, including Playa Blanca, Puerto del Carmen and Costa Teguise, as well as the capital, Arrecife.

Heat map of short-term rentals in Fuerteventura



Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

Heat map of short-term rentals in Lanzarote

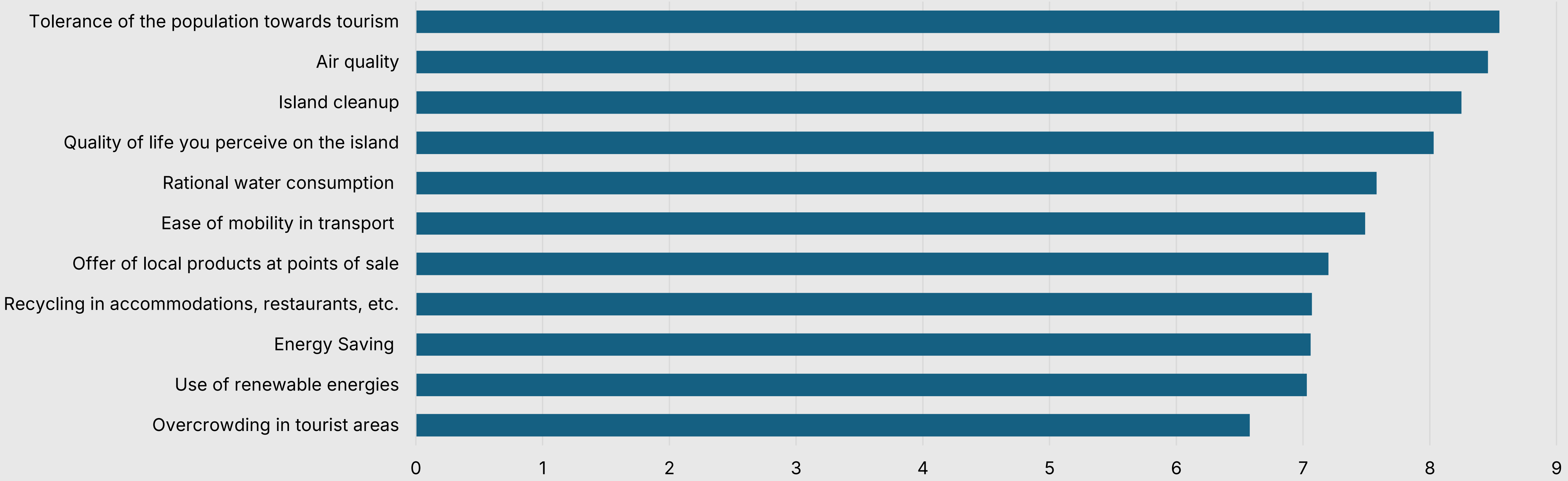


Source: General Tourist Registry, Government of the Canary Islands (Data dated 31/12/2024 purged for this analysis)

Tourists' perception of overcrowding

Analysing tourists' average rating of sustainability aspects in the Canary Islands, local tolerance towards tourism emerges as the highest-rated variable, with an average score of 8.6. Meanwhile, environmental aspects such as the island's cleanliness and air quality also receive high ratings, both scoring above 8.

Average assessment of the importance of different aspects of sustainability by foreign and mainland tourists visiting the Canary Islands in 2023

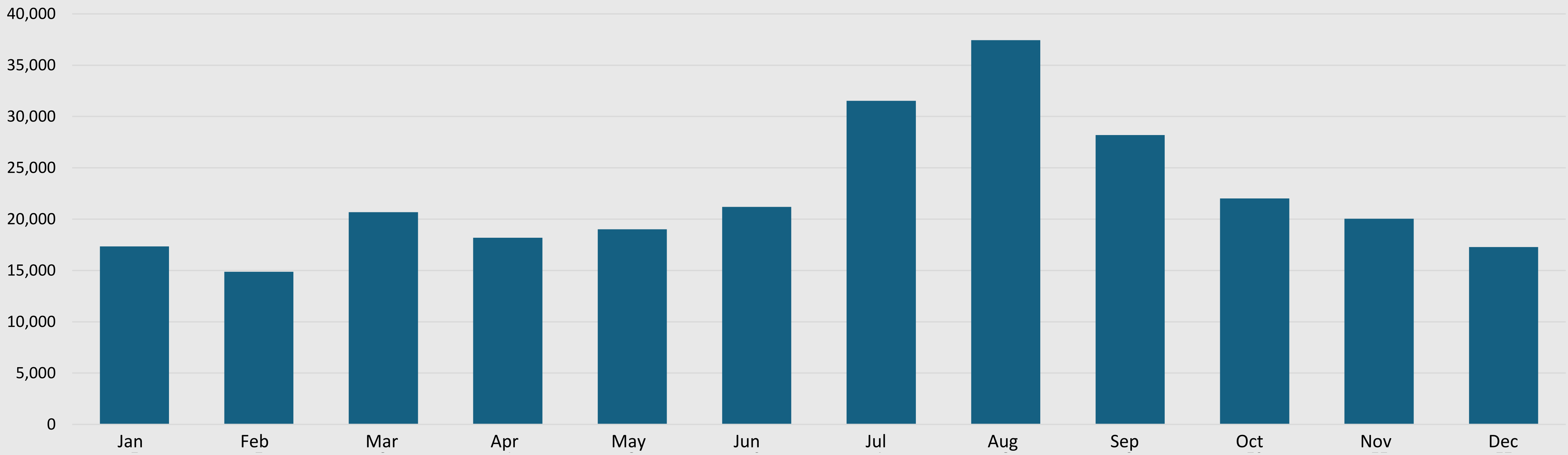


Note: 0 is "not at all important" and 10" is very important. Source: Survey on Tourist Expenditure (ISTAC)

Seasonality and congestion in tourist spots

The issue of overcrowding in the Canary Islands and its environmental and social impact takes on a particular dimension in certain unique tourist destinations. One such case is La Graciosa, an island that officially had 723 inhabitants in 2023 but receives over 30,000 passengers during some summer months. Although part of these passengers are island residents and others are day visitors, the pressure on the island's resources and infrastructure reaches levels in summer that demand much more active management to prevent overtourism-related issues, highlighting the need for sustainable management of the island's tourism carrying capacity.

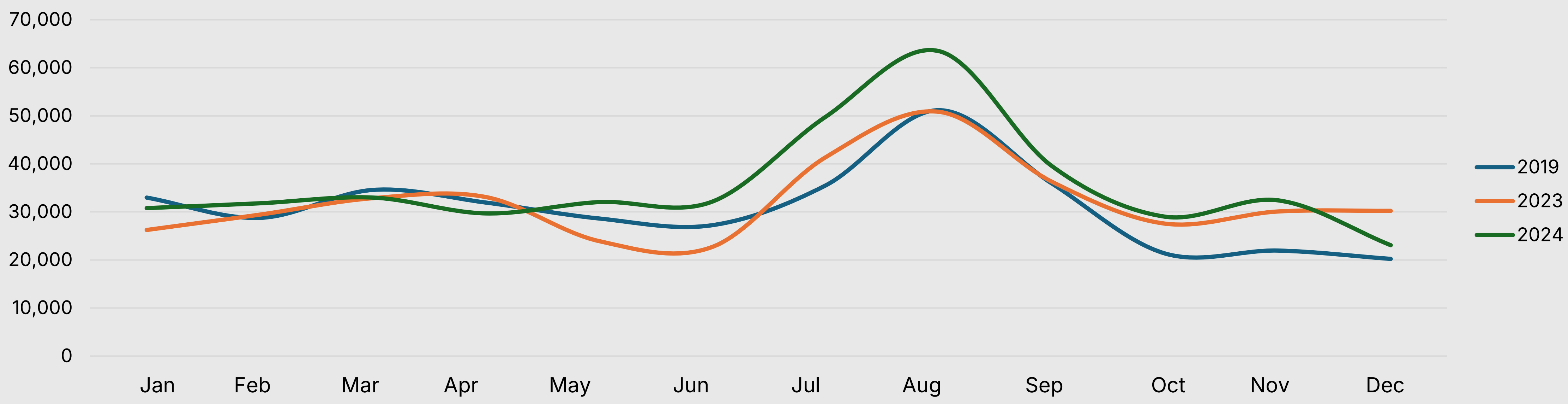
Monthly passenger arrivals at the port of Caleta de Sebo (La Graciosa) in 2024



Source: Puertos Canarios (Government of the Canary Islands)

The influx of visitors to protected natural areas such as Punta de Teno presents challenges in terms of sustainability, seasonality and congestion. During the summer months, the number of people accessing the site increases significantly, placing greater pressure on both the ecosystem and the available infrastructure. This seasonal pattern can lead to carrying capacity issues, affecting both environmental conservation and the quality of the tourist experience. The increase in visits observed in 2024 compared to previous years suggests an intensification of these challenges. At peak times, congestion at access points and parking areas may result in environmental impact, such as trail degradation or increased litter. Addressing this situation would require the implementation of management measures, such as access control, promotion of off-peak visits, or improved public transport to the site, thereby reducing reliance on private vehicles.

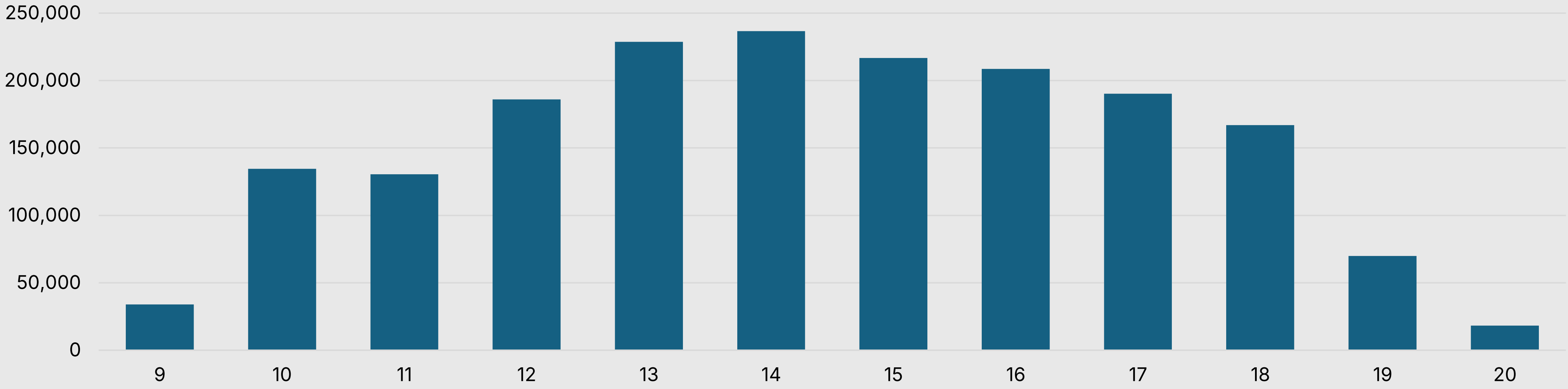
Monthly visits of people to Punta de Teno in 2024 and previous years



Source: Influx of vehicle access to Punta de Teno (Cabildo Insular de Tenerife)

Congestion issues at tourist attractions such as Punta de Teno are not only linked to seasonality throughout the year, but also to the timing of visits. Most access to this site is concentrated between 12:00 and 16:00, with peak arrivals in the early afternoon, which can lead to overcrowding at entry points, parking areas, and within the site's carrying capacity. This time-specific concentration of visits can heighten environmental impact and diminish the quality of the visitor experience, while also placing additional pressure on infrastructure. To enhance the destination's sustainability, it is advisable to diversify access times through strategies such as incentives for off-peak visits and restrictions during the most crowded time slots—measures that are already being applied at this location. Efficient visitor flow management can mitigate the negative effects of overcrowding without reducing overall visitor numbers.

Visits of people to Punta de Teno, according to arrival time in 2024



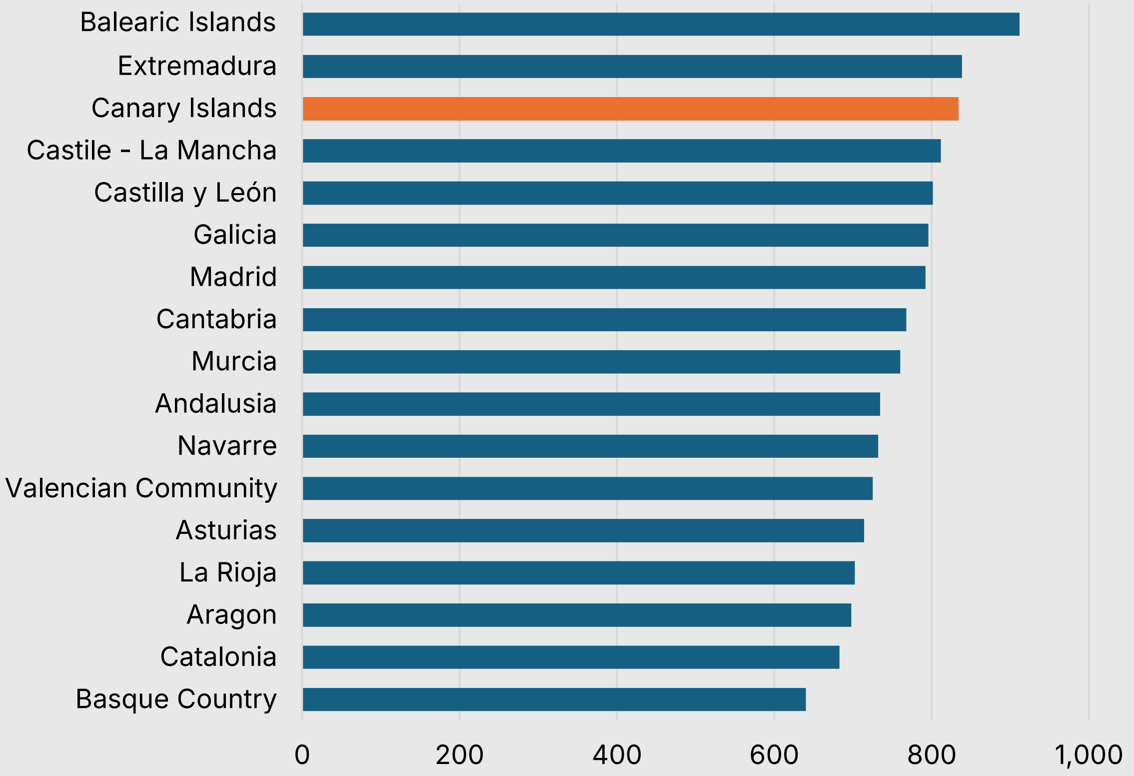
Source: Influx of vehicle access to Punta de Teno (Cabildo Insular de Tenerife)

Vehicles in circulation

In the Canary Islands, the high number of vehicles in circulation represents one of the main challenges in terms of mobility and sustainability. With 834 vehicles per 1,000 inhabitants, the islands rank among the highest compared to other autonomous communities. This high rate of motorisation reflects a strong dependence on private transport, contributing to congestion, pollutant emissions, and urban space occupation.

In the Canary Islands, the combination of heavy reliance on private vehicles, limitations in public transport, and insular geographic features exacerbates mobility challenges, highlighting the need for strategies to reduce private car use and promote more sustainable transport alternatives.

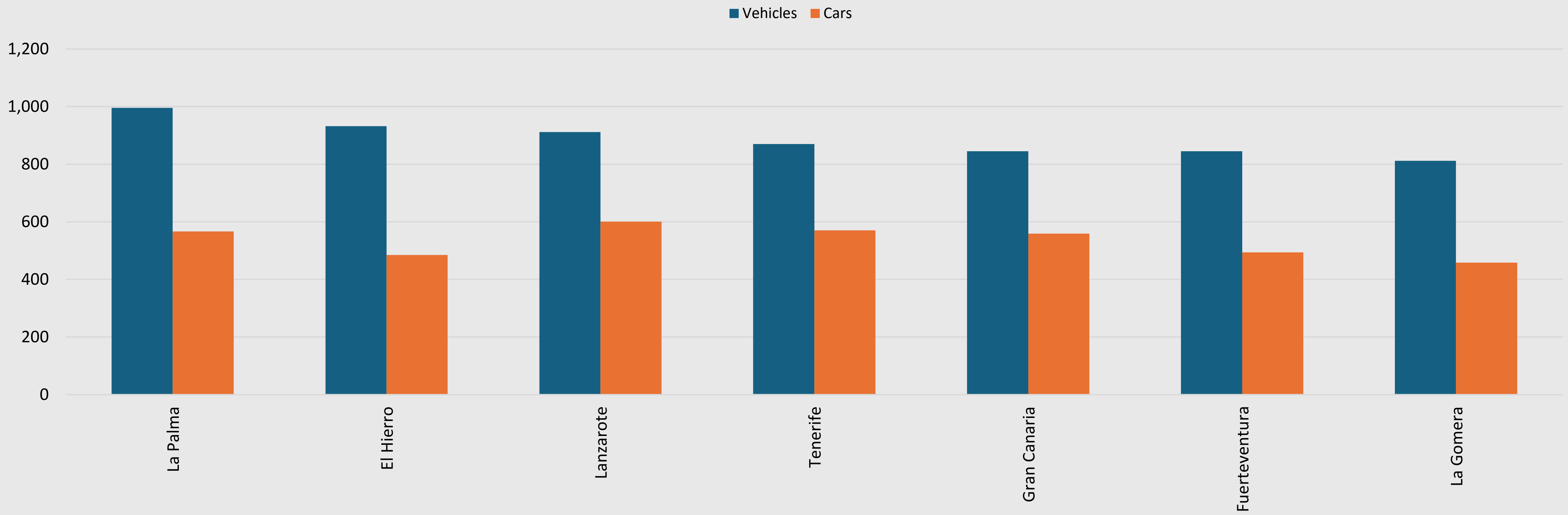
Vehicles in circulation per 1,000 inhabitants in 2023



Source: National Vehicle Park (Ministry of Transport and Sustainable Mobility) and Continuous Population Statistics (INE)

The high number of vehicles per 1,000 inhabitants in the Canary Islands highlights the archipelago's strong reliance on private transport. La Palma stands out with the highest ratio—nearly 1,000 vehicles per 1,000 inhabitants—while the other islands show relatively similar figures, albeit consistently high when compared to other regions.

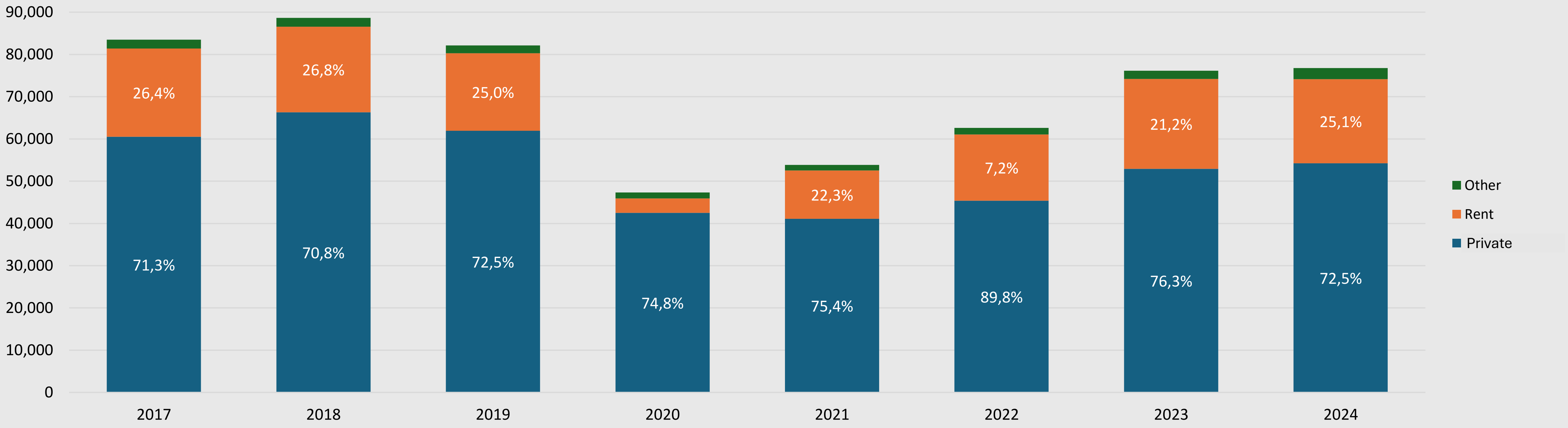
Vehicles in circulation per 1,000 inhabitants in the Canary Islands in 2023



Source: Vehicle Fleet Statistics (ISTAC)

Vehicle registrations in the Canary Islands show a significant share of the rental sector, which accounts for 25.1% of the total in 2024. This proportion reflects the tourism sector's heavy reliance on car transport, with high demand for rental vehicles across the archipelago. Two brief comments are worth noting. First, rental cars are an integral part of the tourist experience in the Canary Islands, allowing visitors to move around easily and safely while discovering charming spots on their own. Second, a 25% share of vehicle registrations does not imply that 25% of vehicles on the road are rentals, as these cars typically have a short lifespan and are later exported to other markets as used vehicles. In any case, the presence of a large rental car fleet contributes to congestion in certain tourist areas and presents challenges for the sustainability of the transport system. Reducing dependence on private cars for tourist mobility remains a key challenge in improving transportation in the Canary Islands.

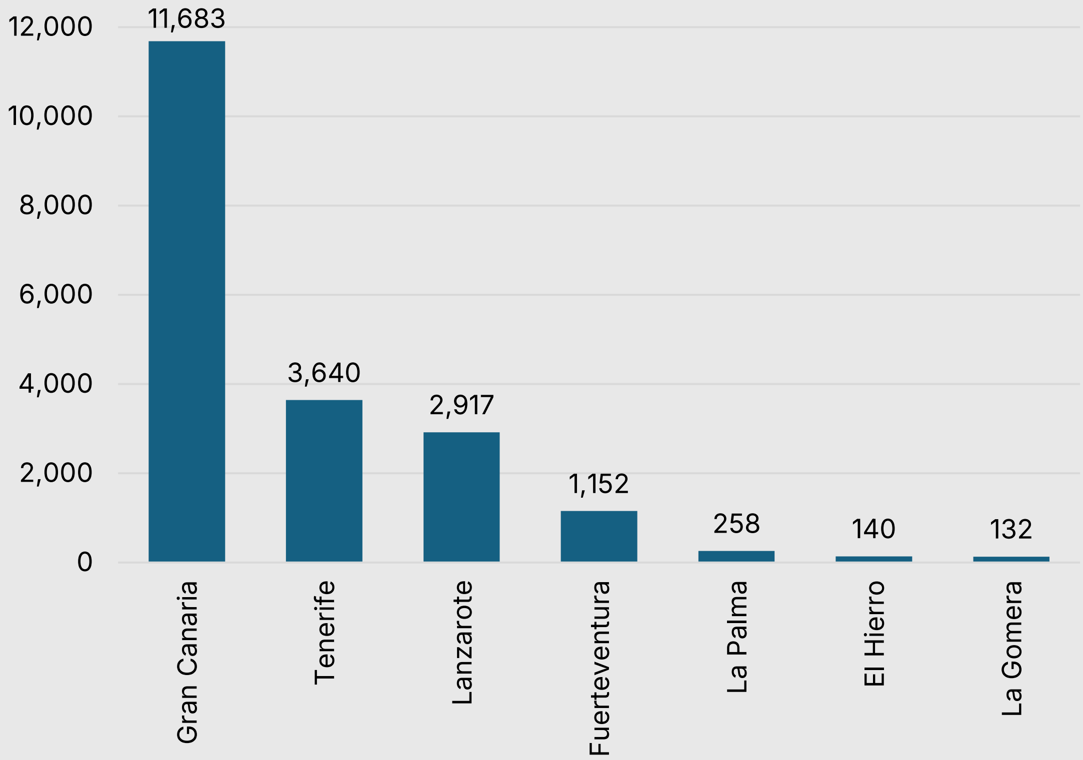
Vehicle registration in the Canary Islands, according to the service intended



Source: Vehicle Registration, Transfer and Deregistration Statistics (ISTAC)

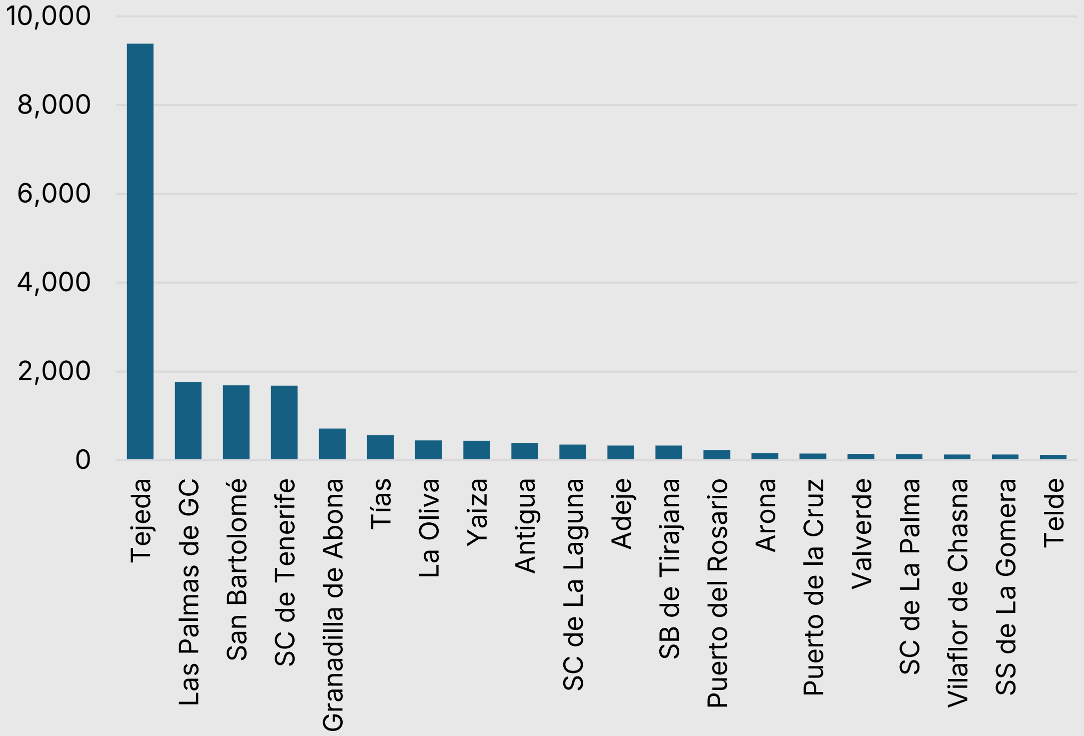
The tourism transport model based on rental cars generates some unique trends that warrant attention. In 2024, 80% of all rental vehicles registered in the Canary Islands were registered in the small municipality of Tejeda, which offers highly favourable tax conditions.

Registration of self-drive rental vehicles by island in 2024



Source: Vehicle Registration, Transfer and Deregistration Statistics (ISTAC)

Registration of driverless rental vehicles in municipalities with the highest number of registrations in 2024



Source: Vehicle Registration, Transfer and Deregistration Statistics (ISTAC)

Mass tourism and overtourism

Indicator	Availability	Source	Remarks
Ratio of accommodation places in relation to territory	Available	Tourist Accommodation and Surface Data Survey (ISTAC)	The total number of accommodation places includes hotels, apartments and homes for tourist use.
Ratio of accommodation places to number of inhabitants	Available	Survey of Tourist Accommodation and Population Register (ISTAC)	The total number of accommodation places includes hotels, apartments and homes for tourist use.
Choosing sustainable options when booking travel	Available	Tourist Expenditure Survey (ISTAC)	
Perception of sustainability measures	Available	Tourist Expenditure Survey (ISTAC)	
Willingness to spend more on the trip to reduce their carbon footprint	Available	Tourist Expenditure Survey (ISTAC)	

4.14

Maturity of the destination and renewal

Introduction

Tourism in the Canary Islands has evolved over decades to become a well-established destination on the international stage. However, this process of consolidation brings with it challenges associated with destination maturity, which require specific strategies to ensure long-term sustainability and competitiveness.

One of the main indicators of a mature destination is the high percentage of repeat visitors. While this reflects strong market loyalty, it also presents challenges in terms of diversifying and refreshing the tourism offer. In 2024, 37% of visitors to the Canary Islands had travelled to the archipelago five or more times, a figure that has increased compared to 2019. Although this loyalty is a positive sign of the destination's quality, it also highlights the need to innovate and adapt the tourism offer to emerging trends and new market segments.

The evaluation of the tourism experience in the Canary Islands remains high. Most tourists rated their stay as "in line with expectations" or even "better than expected", with satisfaction and recommendation scores close to 9 out of 10. Consolidated destinations must remain actively committed to the continuous renewal of their tourism offer in order to continue meeting visitor expectations and avoid perceptions of stagnation or lack of innovation.

In this context, destination renewal should focus on improving tourism infrastructure, diversifying products and experiences, and integrating sustainability principles that ensure environmental preservation and the well-being of the local population. Adapting to new market demands, such as experiential tourism, sustainable tourism and digitalisation, will be key to maintaining future competitiveness.

This chapter examines a number of indicators linked to mature destinations that must maintain a firm pace of renewal, with the aim of preserving their appeal, optimising the management of tourist flows and ensuring balanced development that benefits both visitors and residents. Unfortunately, there is currently insufficient statistical information on the renewal of public and private spaces, a shortcoming that should be addressed in the coming years.

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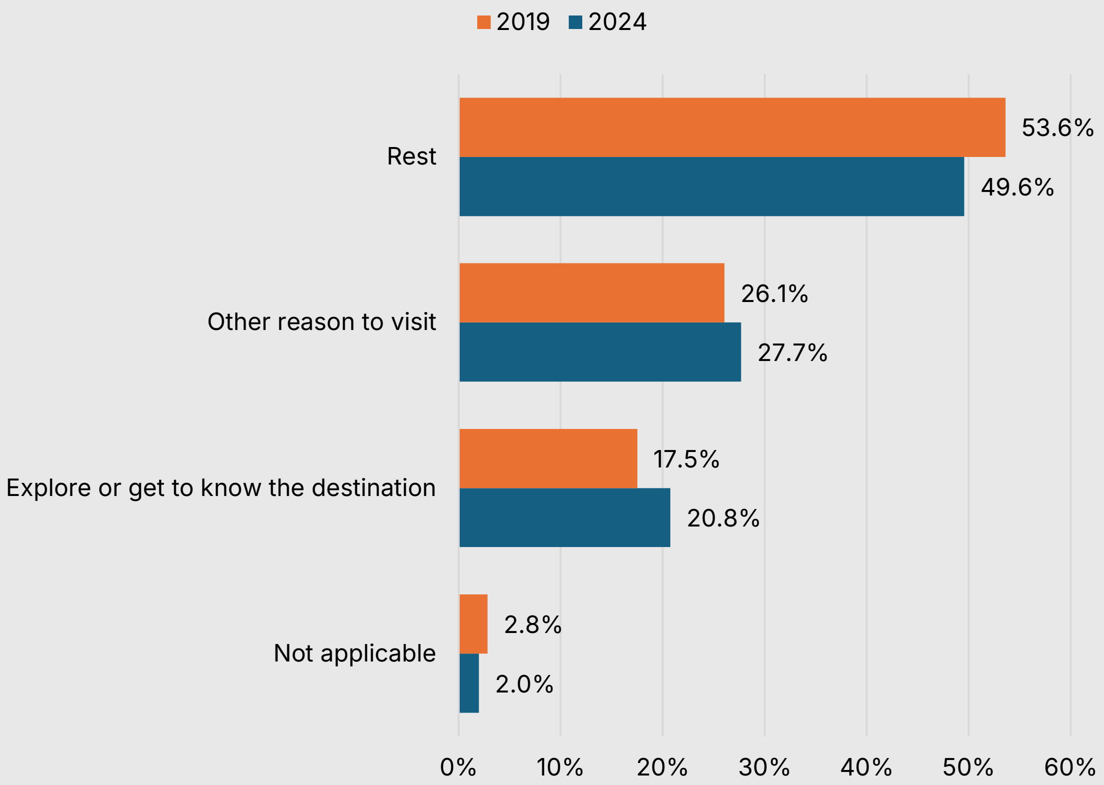
Motivations of tourists

Between 2019 and 2024, there has been a decline in the proportion of visitors travelling to the islands primarily for rest, while motivations related to exploring or discovering the destination, as well as other reasons for visiting, have increased.

This shift in tourist preferences reflects an evolution in demand that can be viewed positively in the context of a mature destination, as it indicates that visitors continue to seek new experiences or alternatives to enrich their stay.

From the perspective of destination renewal, these data point to the need to diversify the tourism offer, placing greater emphasis on sustainable experiences tailored to emerging market segments that complement the traditional sun and beach model. The growing motivation to explore suggests that tourists are increasingly willing to discover new areas, which presents an opportunity to promote less saturated zones, while also posing a risk of new congestion hotspots emerging due to increased visitor mobility.

Main motivation for tourists to come to the Canary Islands

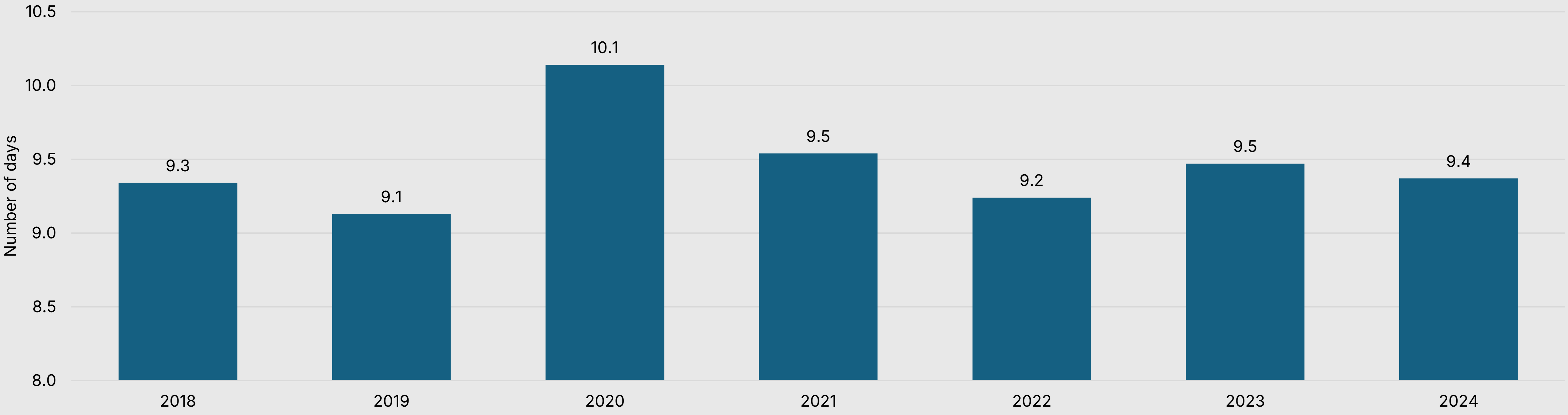


Source: Survey on Tourist Expenditure (ISTAC)

Average length of stay

The average length of stay over the years analysed has remained relatively stable, with the exception of 2020, which was distorted by the pandemic. The Canary Islands are experiencing an evolution in this variable that is difficult to predict. On the one hand, there has been a long-standing international trend in the tourism sector towards shorter stays, linked to new patterns of consumption and leisure. On the other hand, the demands of climate change and the need to reduce tourism's carbon footprint argue in favour of longer stays and more authentic experiences that foster deeper engagement with the destination. In any case, average stay figures result from varying behaviour across different segments. Tourists staying in hotels tend to have shorter stays, while those using holiday rentals, staying in second homes, or visiting friends and relatives are associated with longer durations.

Average length of stay of tourists visiting the Canary Islands

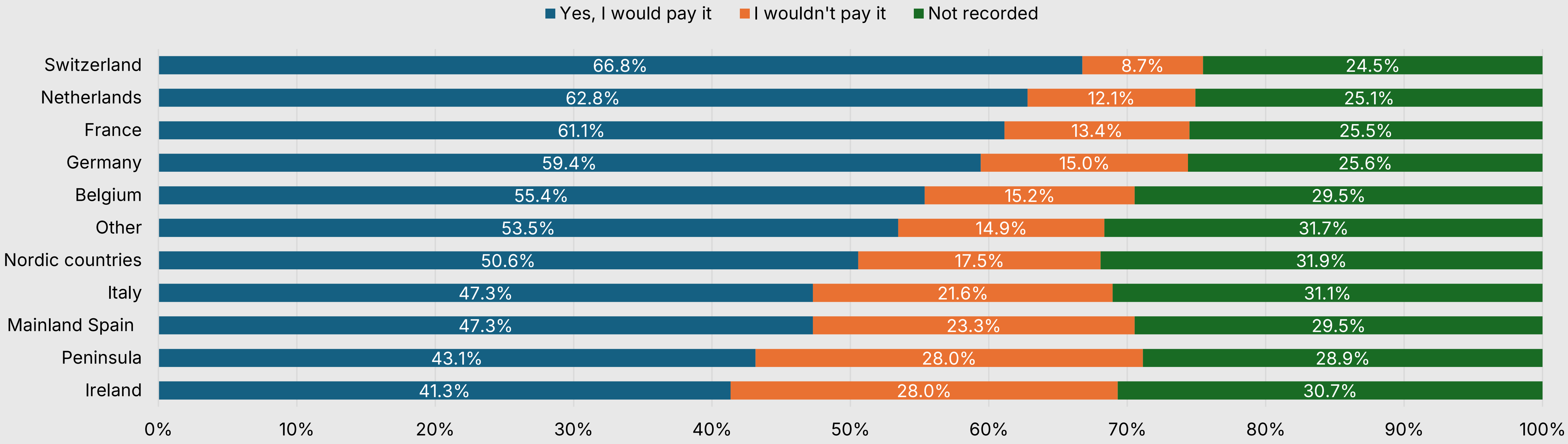


Source: Survey on Tourist Expenditure (ISTAC)

Willingness to pay a tourist tax

Successful mature destinations are often those that implement overnight stay taxes (commonly referred to as tourist taxes) to help offset the costs generated by tourist inflows. According to data from the Tourist Expenditure Survey, Swiss tourists show the highest willingness to pay such a tax, with 66.76% in favour, while Spanish tourists (excluding those from the Canary Islands) show the lowest willingness, at 27.99%. The fact that a significant share of tourists is willing to pay this tax suggests that its implementation in the Canary Islands could be viable, provided it is designed strategically.

Willingness to pay a tourist tax per day of accommodation in the Canary Islands



Note: Average for the second and third quarters of 2024. Source: Survey on Tourist Expenditure (ISTAC)

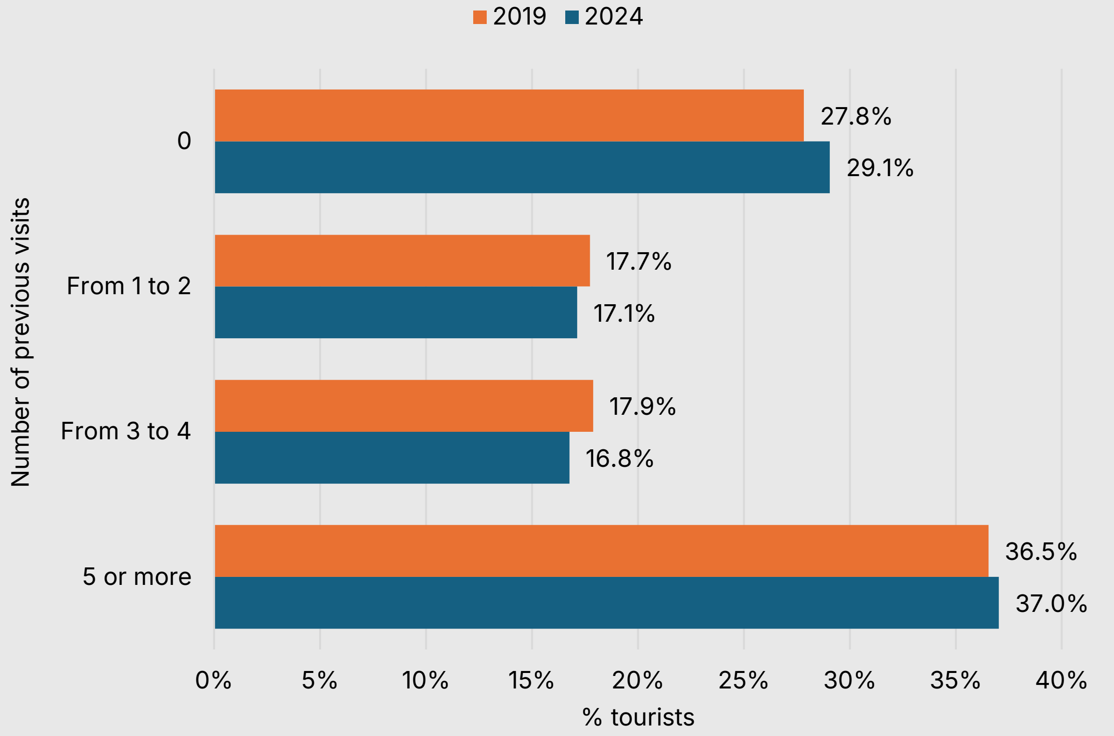
Previous visits

37% of tourists arriving in the Canary Islands had previously visited the Canary Islands on five or more occasions, a percentage that has increased compared to 2019 (ISTAC, 2023).

From the perspective of destination maturity, this reflects a high level of visitor loyalty, which is characteristic of well-established tourist destinations. Tourist loyalty is a positive indicator of satisfaction with the destination's offer, but it also highlights the need for ongoing renewal to avoid perceptions of stagnation and to meet the expectations of repeat visitors. At the same time, the decline in the proportion of first-time visitors may signal a challenge in attracting new markets.

A mature destination must strike a balance between retaining repeat visitors and attracting new segments of travellers. This requires strategies for product diversification and innovation to meet the expectations of tourists with extensive knowledge of the destination.

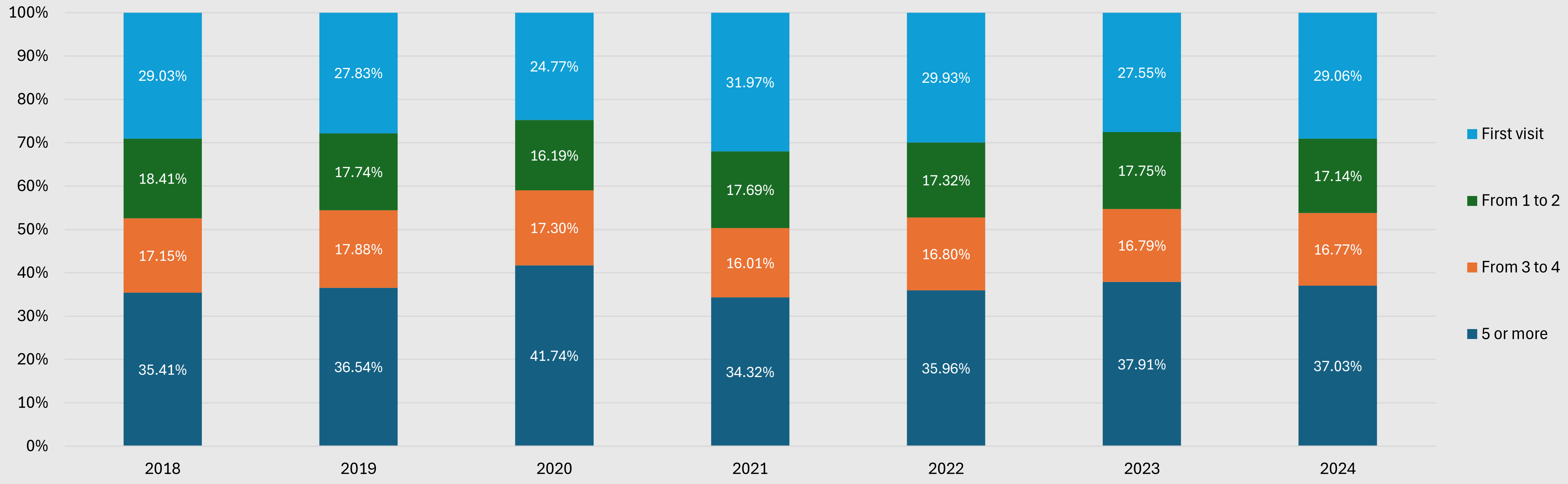
Distribution of tourists according to the number of previous visits to the Canary Islands



Source: Survey on Tourist Expenditure (ISTAC)

The Canary Islands maintain a high percentage of repeat visitors, reflecting strong destination loyalty. However, this trend also presents the challenge of attracting new visitors and diversifying the tourism offer. The proportion of tourists arriving in the archipelago for the first time has remained relatively stable at around 30% in recent years. A balanced strategy is needed—one that ensures the retention of loyal tourists while also attracting new market segments, thus supporting sustainability and maintaining the destination's attractiveness and competitiveness in the long term.

Distribution of visitors in the Canary Islands according to the number of previous visits



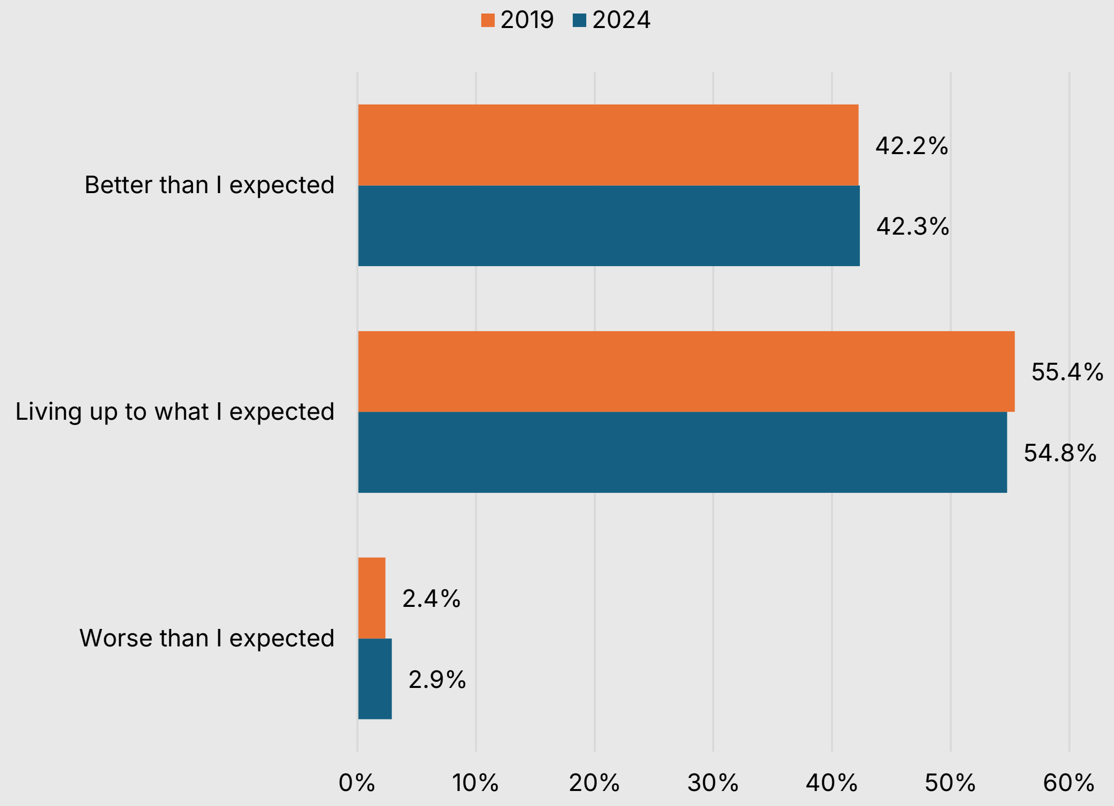
Source: Survey on Tourist Expenditure (ISTAC)

Valuation of experience and satisfaction

The majority of international and mainland Spanish tourists, specifically 54.7%, rated their experience in 2024 as “in line with expectations”, while a significant proportion, 42.3%, considered it “better than expected”. Only a small percentage, 2.9%, stated that it was “worse than expected”.

The evaluation of the tourism experience in the Canary Islands remains high, both in comparison with previous years and relative to other Spanish autonomous communities. Nevertheless, this should not preclude the need to adapt to emerging trends and to improve tourism’s contribution to the overall well-being of the archipelago’s population.

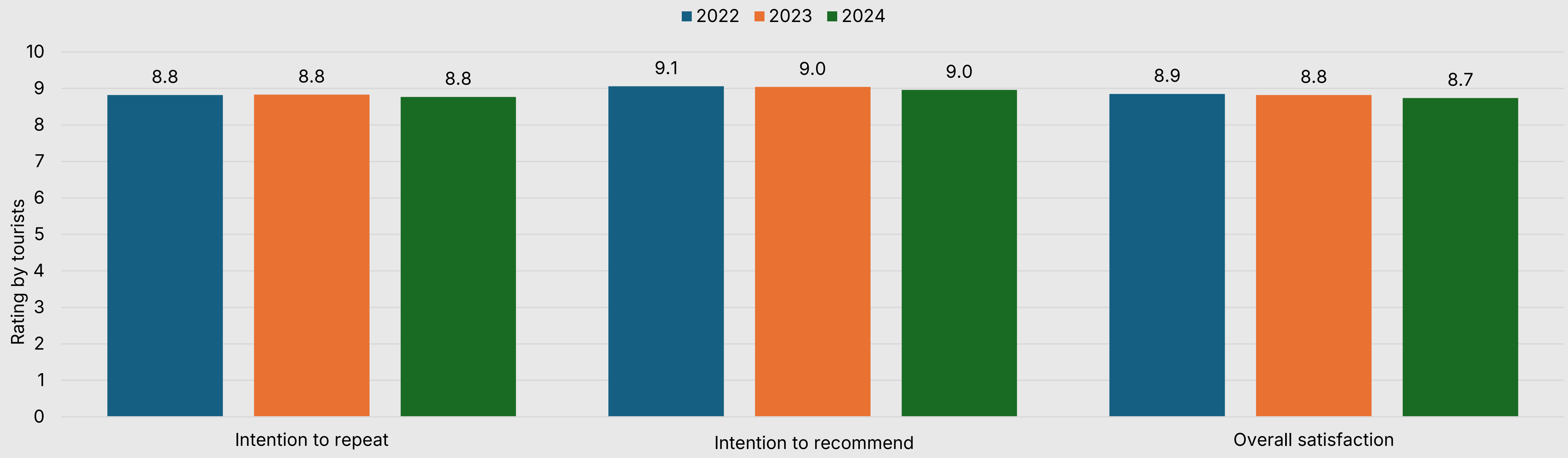
Rating of the experience in the Canary Islands by tourists



Source: Survey on Tourist Expenditure (ISTAC)

The average rating of the Canary Islands by tourists remains close to 9 on a scale of 10, reflecting a strong intention to both return and recommend the destination. These results can be interpreted as a sign of strength for a mature destination that continues to appeal to visitors. However, they are also subject to a potential bias, as they reflect the opinions of those who have actually visited, often repeatedly. In 2024, a very slight decline was observed across all three indicators: intention to return, intention to recommend and overall satisfaction. This trend should be monitored in the coming years in case it signals the beginning of a broader shift. Maintaining high levels of tourist satisfaction will be essential for the destination's competitiveness, especially in a context of growing sensitivity to sustainability, quality of experience and the emergence of newer destinations for travellers.

Average rating of the Canary Islands by tourists on a scale of 0 to 10



Source: Survey on Tourist Expenditure (ISTAC)

Tourism sustainability plans

One form of renovation of the tourism space in recent years has been the implementation of sustainability plans. At present, there are a total of four active Destination Sustainability Plans in the Canary Islands under the standard call for proposals. These plans aim to make sustainability the cornerstone of the transformation of the tourism model. They require significant coordination between the national government, the Government of the Canary Islands and the local authority benefitting from the plan.

Extraordinary Tourism Sustainability Plans in destinations approved in 2021 and 2022

Los Llanos de Aridane: it acts in the recovery of wine-growing areas or the creation of the Eco-Tur Route, which will run through the new physical reality derived from the eruption of the Tajogaite volcano, also having other objectives such as the environmental recovery of natural spaces.	La Palma: includes rural and active tourism actions, proposing as specific objectives the development of gastrotourism and wine tourism and the improvement of activities related to ecotourism and Astro tourism. Setting the general objective of achieving the improvement of the quality of the tourist offer.
Gran Canaria: the main actions of this plan are focused on sustainable and cultural tourism, with work focused on generating long-distance trails in the Biosphere Reserve of Gran Canaria and Risco Caído, revaluing and conditioning infrastructures. Another important objective of the plan is to restore the value of the island's Cultural Landscapes, preserving its historical and cultural value.	Lanzarote: the island's sustainability plan focuses mainly on improving the urban areas of the island's 7 municipalities, adding as other objectives the promotion of underwater activities and training for companies located in the towns integrated in the plan.

Regarding the Extraordinary Plans for Tourism Sustainability in Destinations from the 2023 call, eight plans have been approved in the Canary Islands, with joint funding of €41 million through the Recovery, Transformation and Resilience Plan. These plans aim to support the transformation of the Canary Islands' tourism model by focusing on sustainability, digitalisation and diversification of the tourism offer. Environmental conservation, technological innovation and the promotion of segments such as rural and cultural tourism enhance the destination’s competitiveness. In addition, these plans strengthen territorial resilience by addressing areas affected by depopulation or territorial imbalance. In this way, the Canary Islands can position itself as a more sustainable destination aligned with emerging trends in responsible tourism.

Extraordinary Tourism Sustainability Plans in destinations of the 2023 call

La Oliva: Improves tourism competitiveness with a focus on resilience, innovation and recovery of natural and cultural spaces.	It promotes Pájara as an attractive destination through water activities and the use of technologies for unique experiences.
Tejeda: Promotes sustainable rural tourism by improving tourism services and preserving natural and cultural resources.	Gran Canaria: Strengthens coastal resilience by improving public access and sustainability in key tourist areas.
Gran Canaria: Promotes sustainable tourism through digitalisation, modernisation and gastronomic projects.	Candelaria: It values the natural heritage, diversifies the tourist offer and improves mobility to decongest central areas.
Vallehermoso: Revitalises the town by creating themed routes and tourist spaces that curb depopulation and attract visitors.	Destination Cohesion Action (Canary Islands): Consolidates sustainable tourism products by highlighting the quality and diversification of the sector in the Canary Islands.

Extraordinary Tourism Sustainability Plans in destinations approved in 2021 and 2022

2021 Call	Mogán, Valsequillo, El Hierro, La Gomera, Tenerife, Fuerteventura and AMT of the Canary Islands
2022 Call	Biosphere Reserve of Gran Canaria and Risco Caído, Tazacorte, Agulo, Granadilla de Abona, Santiago del Teide, Anaga, Isla Baja and Teno

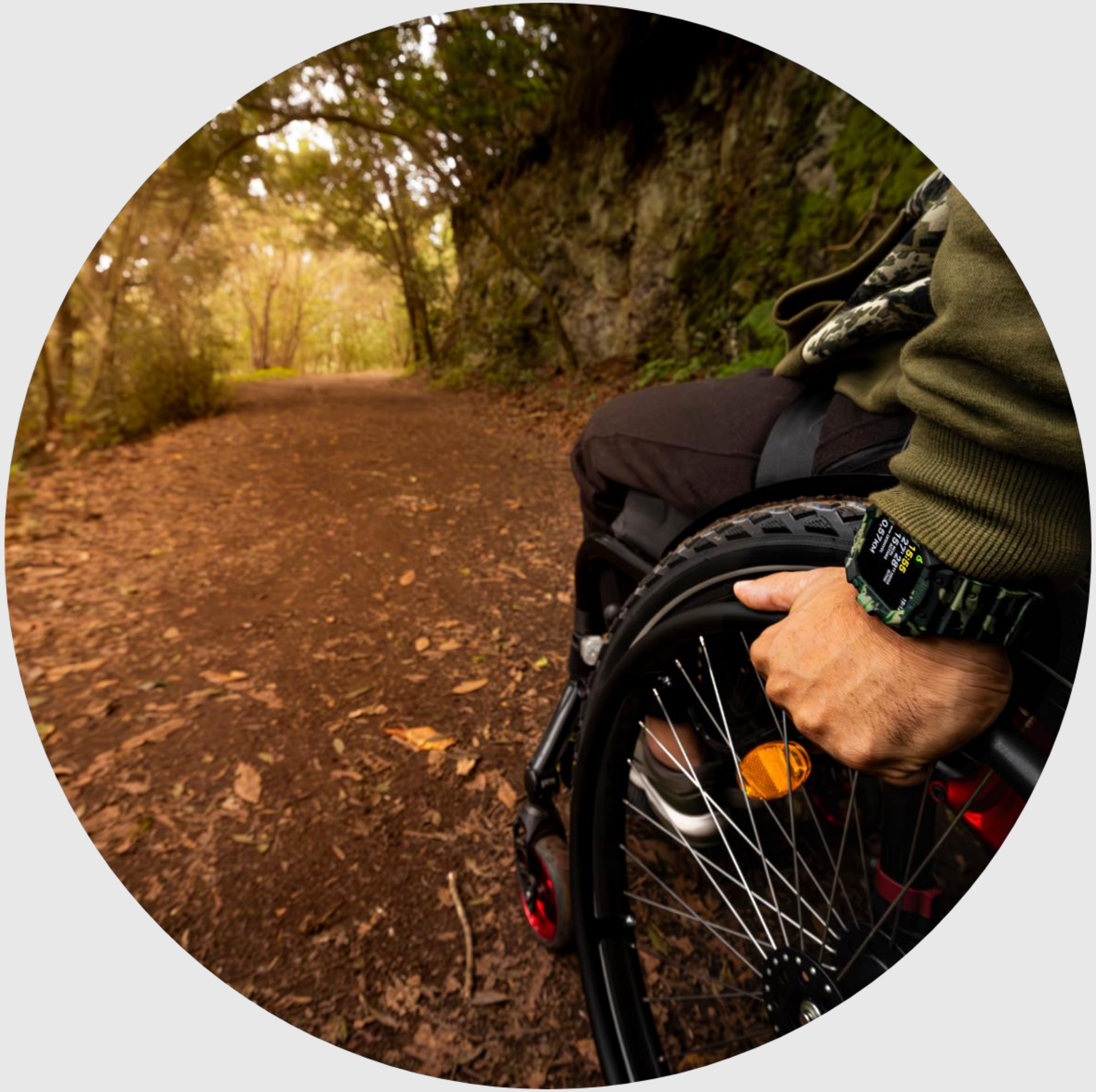
Source of both tables: Ministry of Industry, Trade and Tourism

Destination maturity and renewal

Indicator	Description	Availability
Investment in new tourism assets	Construction of new accommodation and tourist facilities.	Unavailable
Investment in tourism renovation	Investment in the renovation of private spaces (housing and facilities) and public areas.	From ReinvenTUR works
Sustainability of the renovation	Sustainability indicators linked to public/private renovation must be included. And, in particular, monitoring indicators in renewal processes.	Unavailable
Renovated tourist places	Number of spaces renewed and year of renewal.	Unavailable

4.15

Accessibility and inclusivity



Introduction

Accessibility and social inclusion in tourism are fundamental to ensuring the sustainable development of the tourism sector in the Canary Islands. A truly accessible destination not only enables people with disabilities to enjoy its tourism offer on equal terms, but also extends opportunities to other groups with specific needs, such as older adults, families with young children, or travellers with temporary mobility limitations. Ensuring accessible tourism requires the adaptation of infrastructure, improved signage, and the provision of efficient, accessible public transport, while minimising physical, sensory and cognitive barriers.

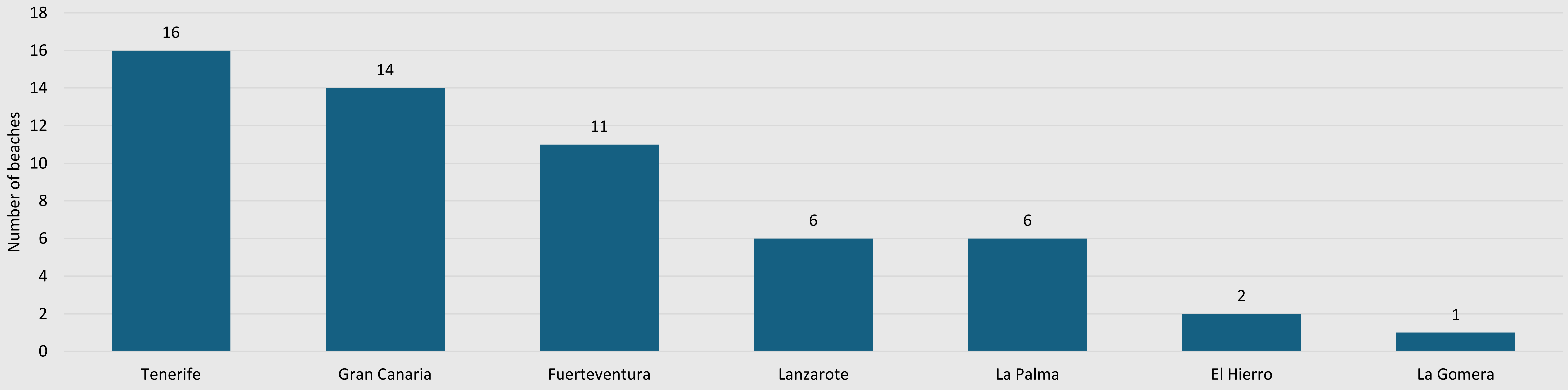
In the Canarian context, the region’s dependency on tourism makes it essential for the sector's development to incorporate principles of equity and inclusion, enabling full participation by both visitors and the local population. This is not only a matter of fundamental rights, but also contributes to diversifying the offer and enhancing the destination’s competitiveness. One of the aspects most highly valued by visitors to the islands is the tolerance of the local population towards tourism and their hospitality. It is crucial that these values are reflected in an inclusive environment, where diversity in personal needs does not pose an obstacle to the enjoyment of the tourism experience.

From both public institutions and businesses, it is essential to apply accessibility criteria from the design phase of infrastructure through to the delivery of services, fostering close collaboration with specialised organisations. Inclusion in tourism is not only an ethical and legal imperative. It is also an opportunity to position the Canary Islands as a benchmark destination, ensuring that the enjoyment of its natural beauty, cultural heritage, and wider tourism offer is available to all, without exception.

Beach accessibility

A total of 56 beaches in the Canary Islands were awarded the Blue Flag by the Association for Environmental and Consumer Education (ADEAC), highlighting the region's commitment to sustainable tourism and compliance with international standards in accessibility, safety and environmental management. This figure represents 8.8% of all Blue Flag beaches in Spain. Within the archipelago, Tenerife led the ranking with 16 awarded beaches, followed by Gran Canaria with 14, including destinations such as Maspalomas and Playa del Inglés, both of which regained the distinction. Fuerteventura obtained 11 Blue Flag beaches, while Lanzarote and La Palma share fourth place, each with 6. This recognition reinforces the Canary Islands' image as a tourism destination committed to sustainability and environmental quality, key factors in attracting responsible tourism.

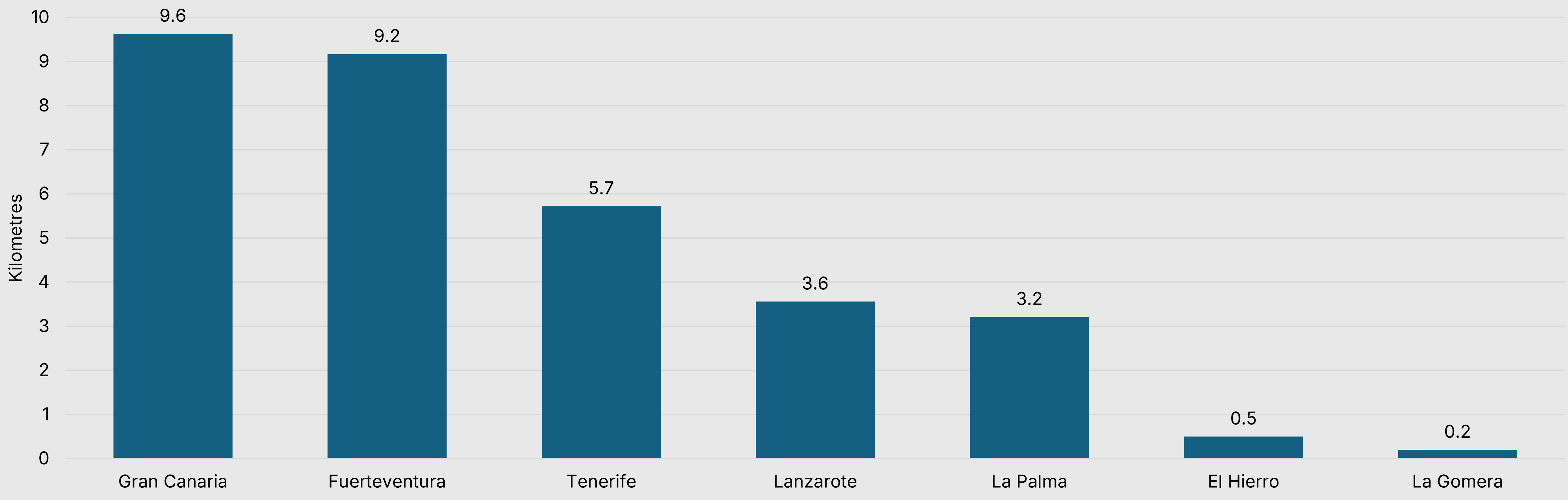
Number of Canary Island beaches with a Blue Flag in 2024



Source: Blue flag beaches 2024 in Spain. Association of Environmental and Consumer Education (ADEAC)

A perspective based on the total length of Blue Flag beaches in the Canary Islands in 2024 offers a different picture. The island with the greatest number of kilometres of Blue Flag beach is Gran Canaria, with 9.6 km, followed by Fuerteventura with 9.2 km and Tenerife with 5.7 km. Lanzarote and La Palma recorded shorter lengths, with 3.6 km and 3.2 km respectively. The islands of El Hierro and La Gomera reported the lowest figures.

Kilometres of Canary Island beaches awarded a Blue Flag in 2024

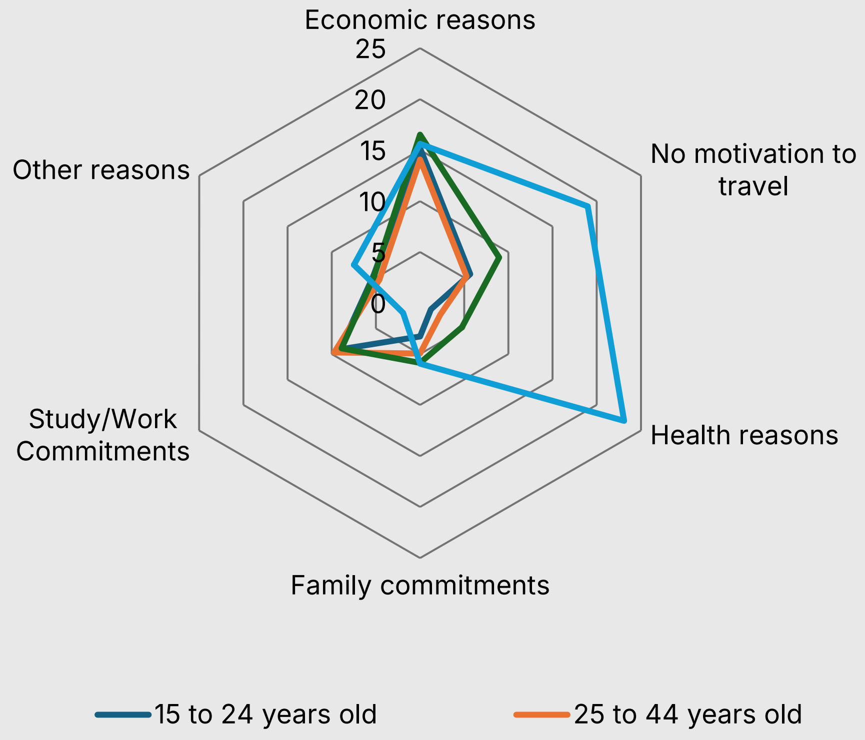


Source: Blue flag beaches 2024 in Spain. Association of Environmental and Consumer Education (ADEAC)

Participation in tourism in the European Union

Among the main reasons why European Union residents do not participate in tourism, economic factors are predominant. In age groups up to 64 years, study or work-related commitments also stand out. However, for individuals aged 65 and over, the main reason for not engaging in tourism is health-related. Given the excellent climatic conditions of the Canary Islands, there is potential to encourage increased arrivals from this age group to the archipelago.

European Union residents' reasons for not participating in tourism by age group in 2022



Note: Measured in %. Source: Travel of Residents of the European Union (Eurostat)

Inclusion and diversity

Tourism targeting the LGTBIQ+ community represents a notable example of how to diversify and strengthen the tourism offer. Gran Canaria and La Palma have recently joined the Spanish Network of Destinations for Diversity. According to figures from the Government of the Canary Islands, around 650,000 LGTBI visitors arrived in the archipelago in 2023, generating approximately €1.2 billion in revenue. In the case of Gran Canaria, destinations such as Maspalomas and Playa del Inglés have become established as international benchmarks for gay-friendly tourism. This segment not only contributes significantly to the local economy, but also reinforces the image of the Canary Islands as a tolerant, inclusive and diverse destination. Moreover, initiatives such as dedicated events, carnival, Gay Pride, and the Love Festival in La Palma have a strong impact and demonstrate the potential of LGTBI tourism to reduce seasonality and promote inclusive experiences.

Destinations belonging to the Spanish Network of Destinations for diversity in 2024

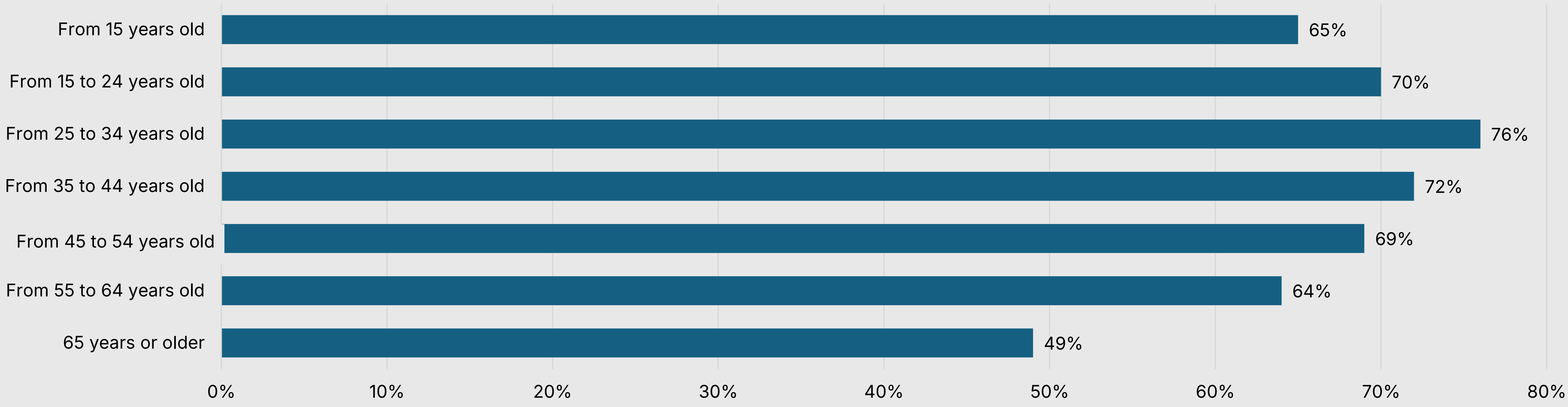
Avila	La Palma
Community of Madrid	Madrid
Cullera	Melilla
Provincial Council of Ávila	Seville
Gandía	Torrejón de Ardoz
Gran Canaria	Torremolinos

Source: Spanish Network of Destinations for Diversity

The Senior tourism segment in Europe

The 25 to 34 age group recorded the highest tourism participation rate in the European Union in 2023, with 76% of individuals in this range undertaking tourist trips during the year. This was followed by the 35 to 44 age group, with a participation rate of 72%. As expected, the 65 and over group shows the lowest participation rate. However, around 50% of this population segment still engages in tourism, and their travel frequency is sometimes higher due to having more free time. Furthermore, this group is gradually becoming the most numerous within the population.

Percentage of the EU population participating in tourism by age group in 2023



Source: Prepared by the authors using data from Eurostat

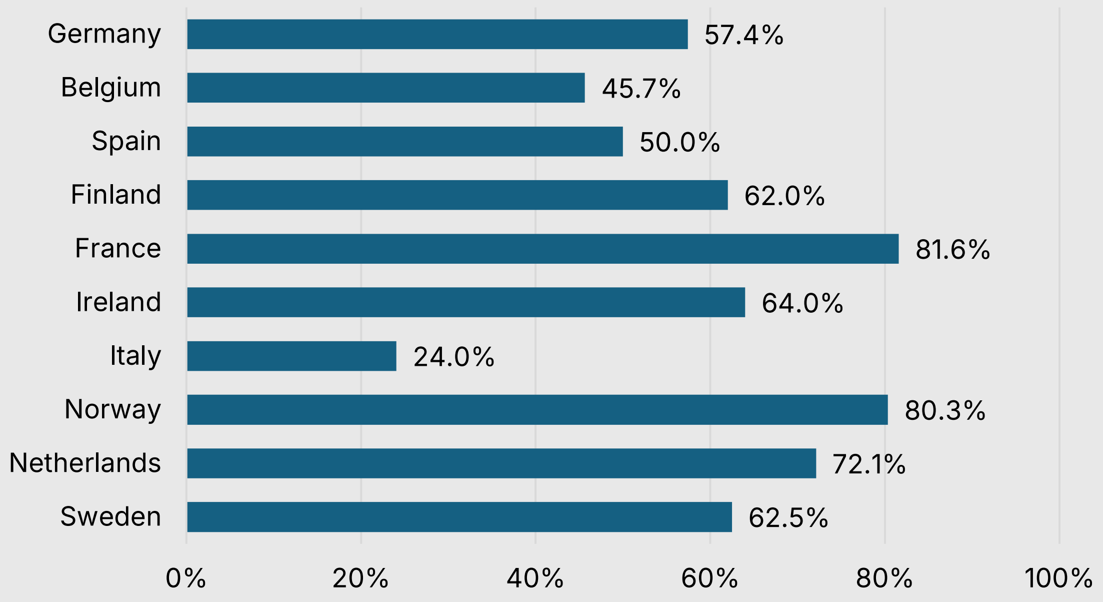
An analysis of trends over the past decade reveals a consistent ageing of the population in the main source markets of interest to the Canary Islands within the European Union. Moreover, although the EU average for tourism participation among those aged 65 and over is below 50%, in key markets for the Canary Islands such as France, Norway and the Netherlands, a high percentage of individuals in this age group actively engage in tourism, with participation rates of 81.6%, 80.0% and 72.1% respectively.

Percentage of population aged 65 and over in different countries of the European Union. Markets of interest to the Canary Islands

Countries	2014	2024
Germany	20.9%	22.4%
Belgium	17.8%	19.9%
Spain	18.1%	20.5%
Finland	19.4%	23.3%
France	18.0%	21.4%
Ireland	12.6%	15.5%
Italy	21.5%	24.3%
Norway	15.9%	18.6%
Netherlands	17.4%	20.5%
Sweden	19.5%	20.6%

Source: Main Population Indicators (Eurostat)

Percentage of the total number of people aged 65 and over who participate in tourism for personal reasons. Markets of interest for the Canary Islands in 2023

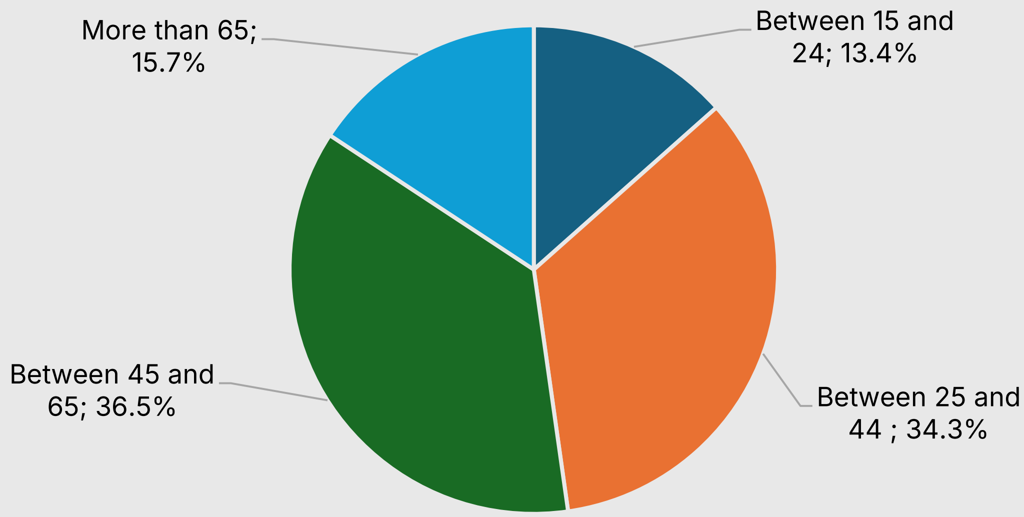


Source: Travel of Residents of the European Union (Eurostat)

According to Eurostat data, 36.5% of people participating in tourism in Spain fall within the 45 to 65 age group. When adding the 15.7% corresponding to those over 65, it can be concluded that, in the future, one third of tourists will be older adults. This will require the adaptation of infrastructure accessibility conditions to better facilitate tourism activity for this segment of the population.

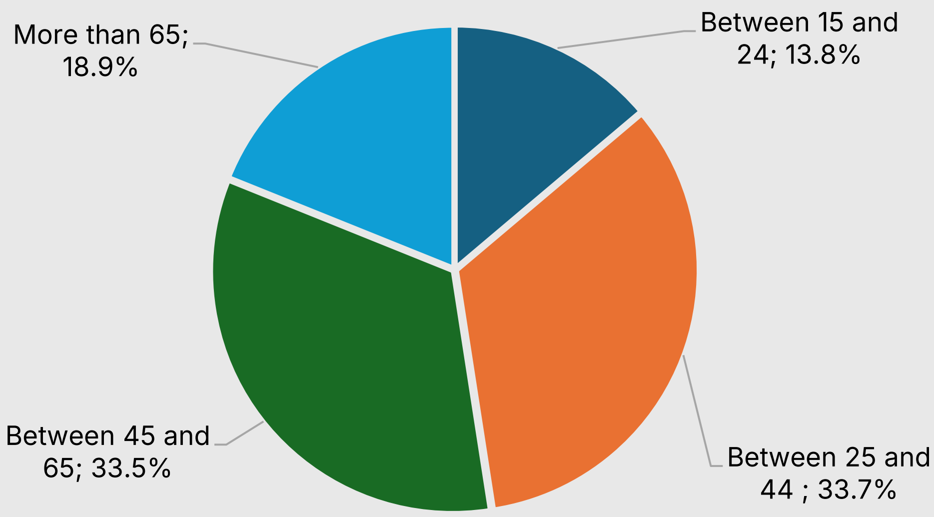
Expanding the analysis, figures at the European level are very similar to those observed in Spain, with age groups over 45 continuing to stand out. Notably, at the European level, the over-65 age group increases by around three percentage points compared to Spanish figures, which, in terms of tourist volume, represents a significant number.

Distribution of people participating in tourism in Spain by age in 2023



Source: Authors' elaboration based on Eurostat data

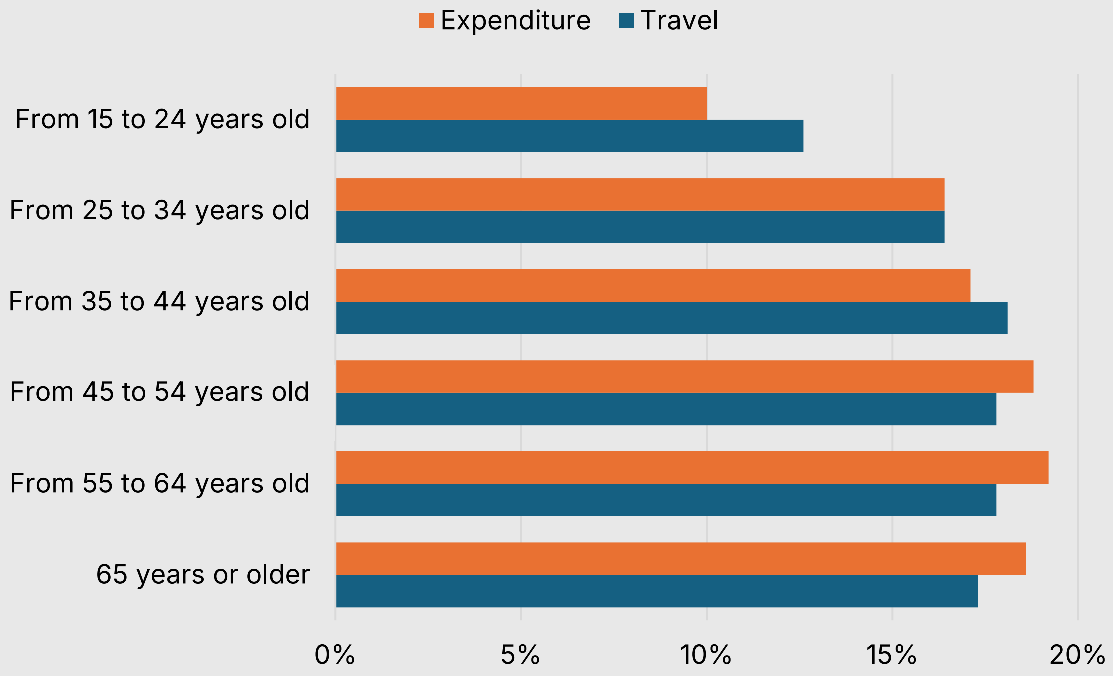
Distribution of people participating in tourism in Europe by age in 2023



Source: Authors' elaboration based on Eurostat data

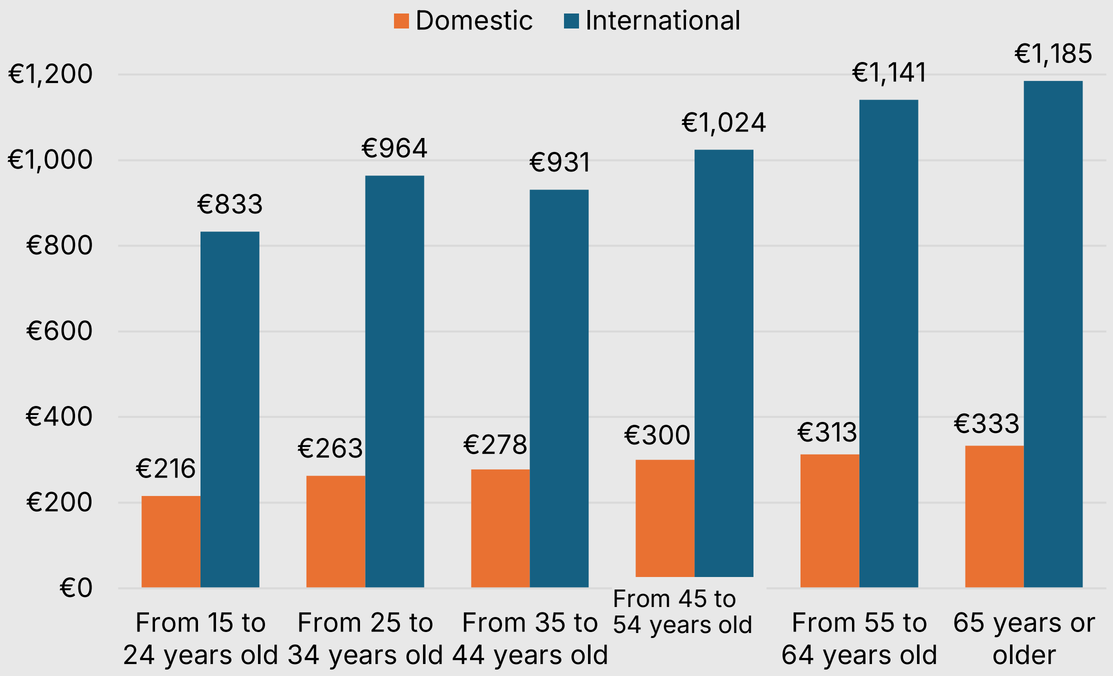
Among tourists residing in the European Union, the age group with the highest average tourist expenditure per trip is those aged 65 and over, followed by the 55 to 64 age group. Given that visitors over the age of 44 represent the largest share of tourist arrivals in the Canary Islands, these groups hold strategic importance for the archipelago's tourism sector.

Share of the age group in the total number of trips and tourist expenditure of trips made by EU residents in 2023



Source: Authors' elaboration based on Eurostat data

Average tourist expenditure of EU residents by age group and type of tourism in 2023

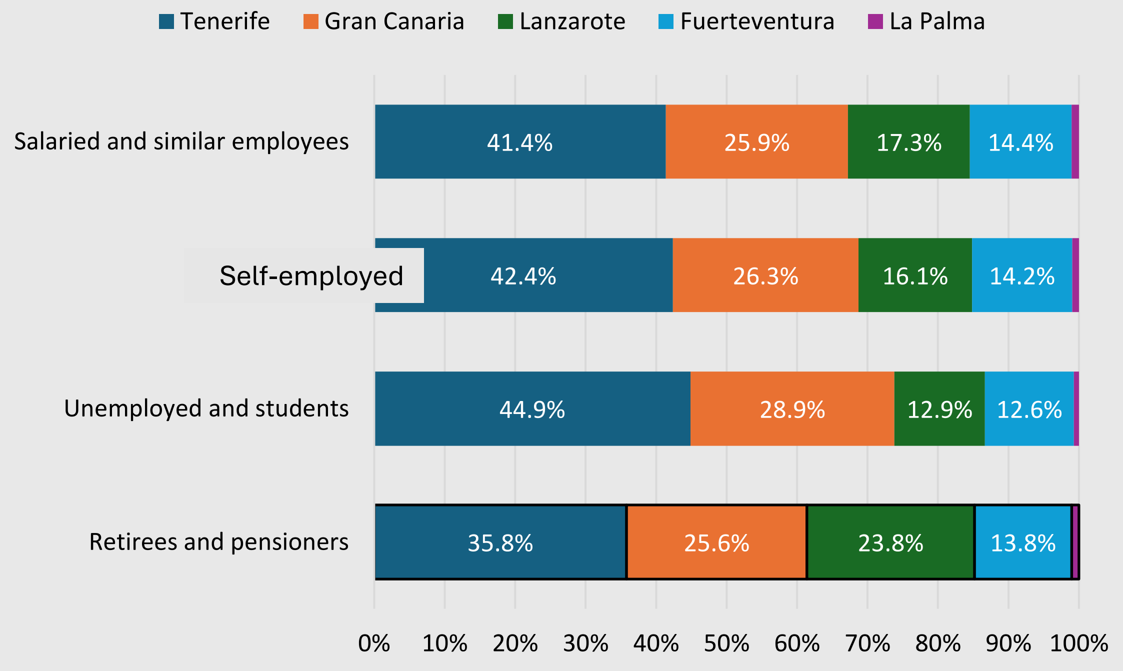


Source: Authors' elaboration based on Eurostat data

Characteristics of senior tourism in the Canary Islands

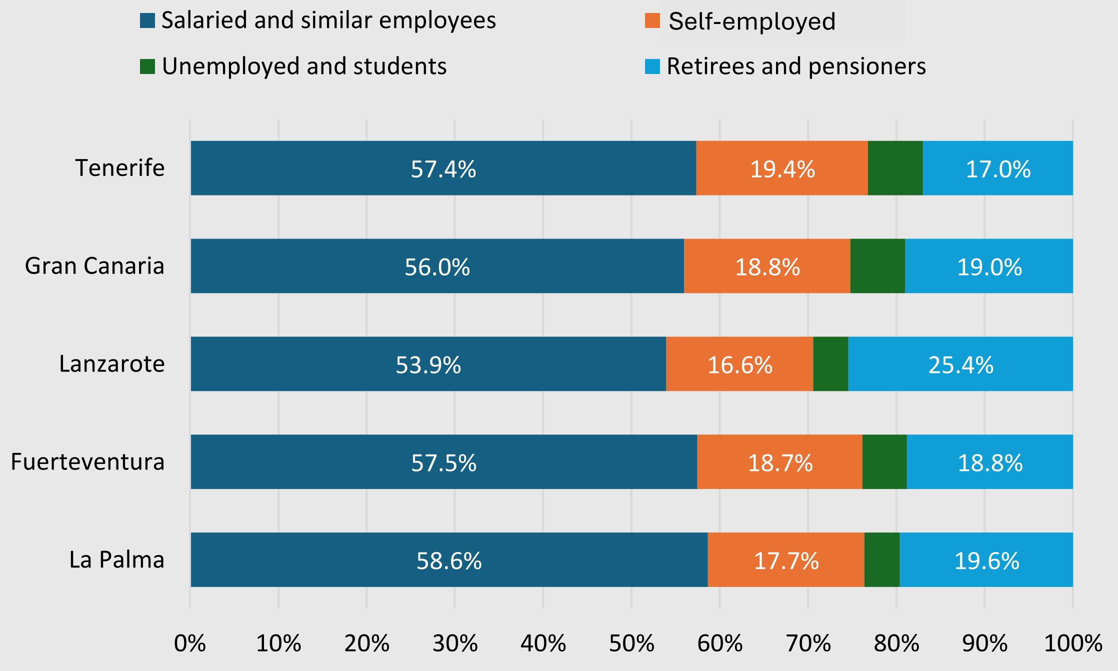
Tenerife receives a slightly lower percentage of retired visitors compared to other islands. Lanzarote stands out for attracting a somewhat higher proportion of retirees and a lower share of unemployed individuals and students. Gran Canaria shows a balanced distribution across different employment profiles. Overall, differences between the islands are minor, with a fairly homogeneous distribution.

Canary Islands chosen by tourists, according to employment situation in 2024



Source: Survey on Tourist Expenditure (ISTAC)

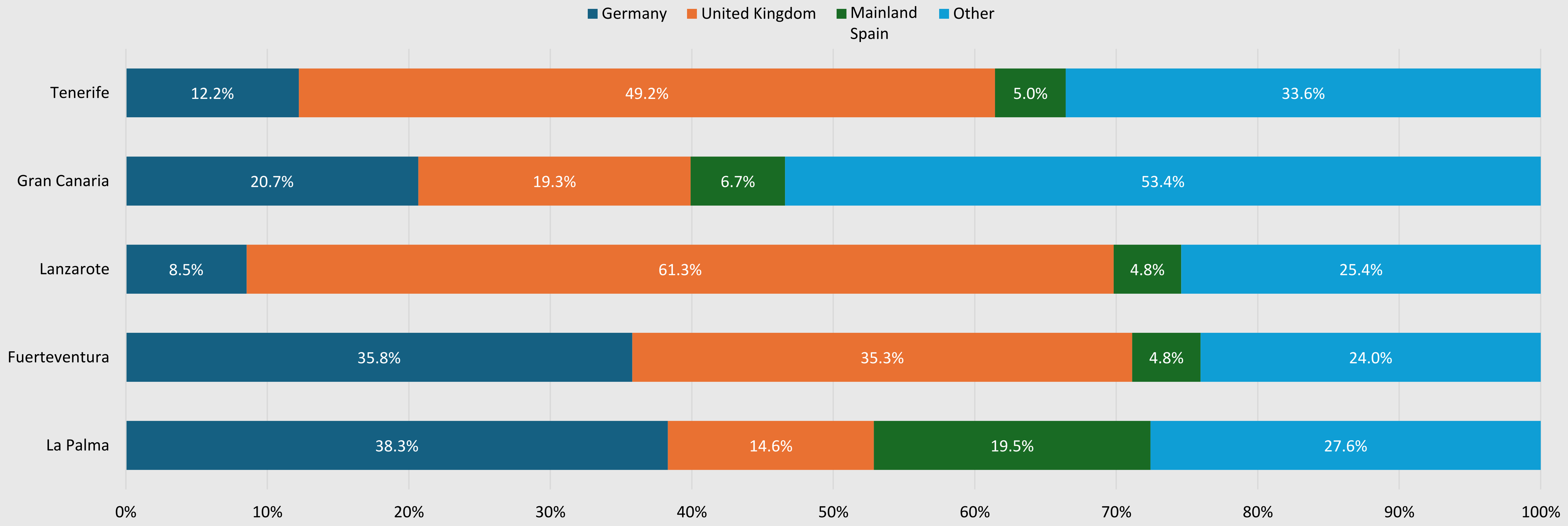
Distribution of tourists arriving in the Canary Islands, according to employment situation in 2024



Source: Survey on Tourist Expenditure (ISTAC)

The distribution of retirees and pensioners by island and country of residence is closely linked to the profile of tourists visiting each island by place of origin. In Tenerife and Lanzarote, most retirees come from the United Kingdom and mainland Spain. In Gran Canaria, the largest group falls under "Other", due to the significant presence of visitors from the Nordic countries. In the case of La Palma, there is a notable presence of retirees from both Germany and the Iberian Peninsula.

Distribution of retired tourists and pensioners arriving in the Canary Islands by place of residence in 2024



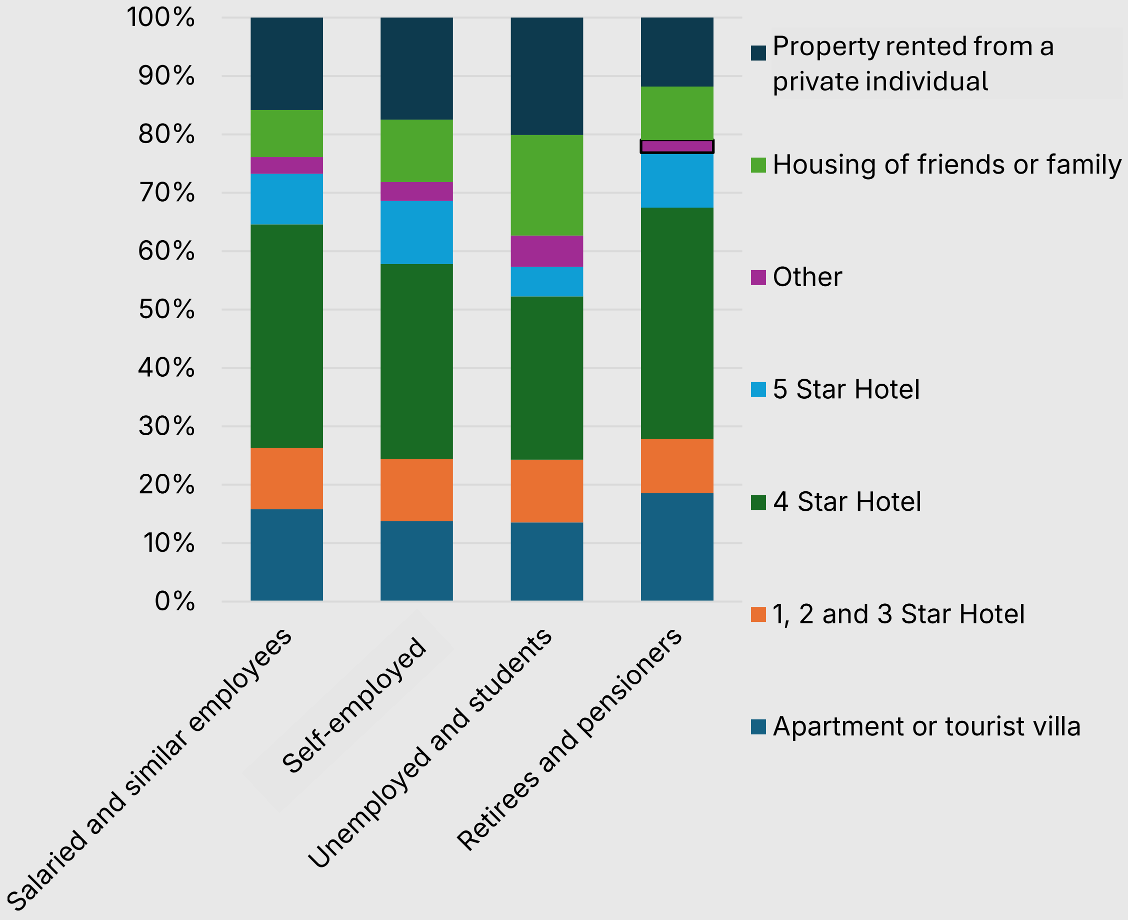
Source: Survey on Tourist Expenditure (ISTAC)

Tourist behaviour in relation to employment status and age influences the type of accommodation chosen in the Canary Islands. Rental housing from private individuals (short term rentals) and accommodation with friends or relatives are more popular among unemployed individuals and students, reflecting a preference for more affordable options.

In contrast, four- and five-star hotels are more in demand among salaried workers and retirees, who allocate a larger share of their expenditure to accommodation. The self-employed display a more balanced distribution across different types of lodging, although they also show a certain preference for four-star hotels.

Retirees and pensioners, meanwhile, show relatively greater interest than other groups in tourist apartments or villas, which may be associated with longer stays and the availability of self-catering facilities.

Distribution of tourists arriving in the Canary Islands according to employment status and type of accommodation chosen in 2024



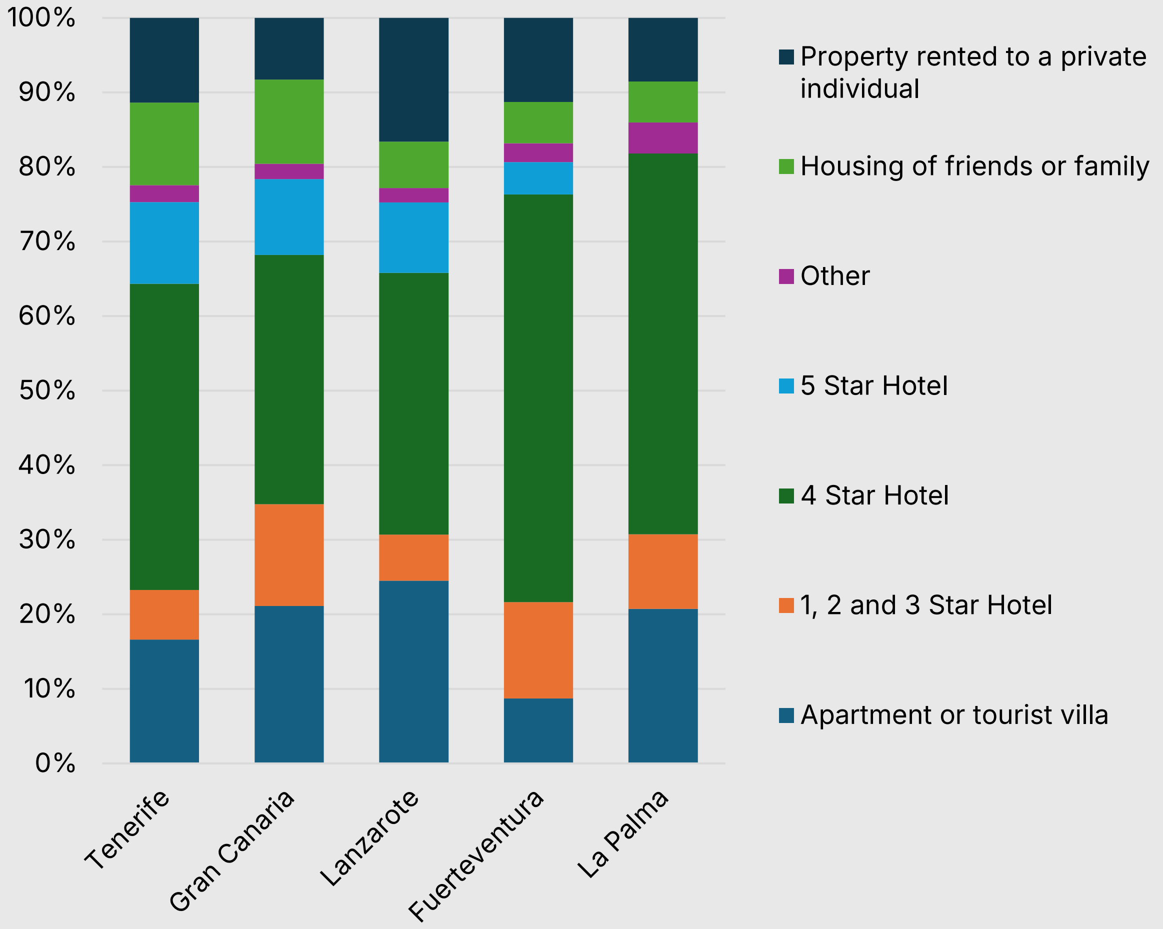
Source: Survey on Tourist Expenditure (ISTAC)

Retired tourists and pensioners show some differences in accommodation choice depending on the island visited. Holiday rentals from private individuals hold significant weight across all islands, with a slightly higher proportion observed in Lanzarote.

Staying with friends or relatives is more common in Tenerife and Gran Canaria, suggesting a stronger presence of personal networks on these islands.

Four- and five-star hotels are the most in-demand accommodation types in Tenerife, Fuerteventura and La Palma, reflecting a preference for comfort and high-quality services. In contrast, tourist apartments or villas are particularly prominent in Lanzarote and La Palma.

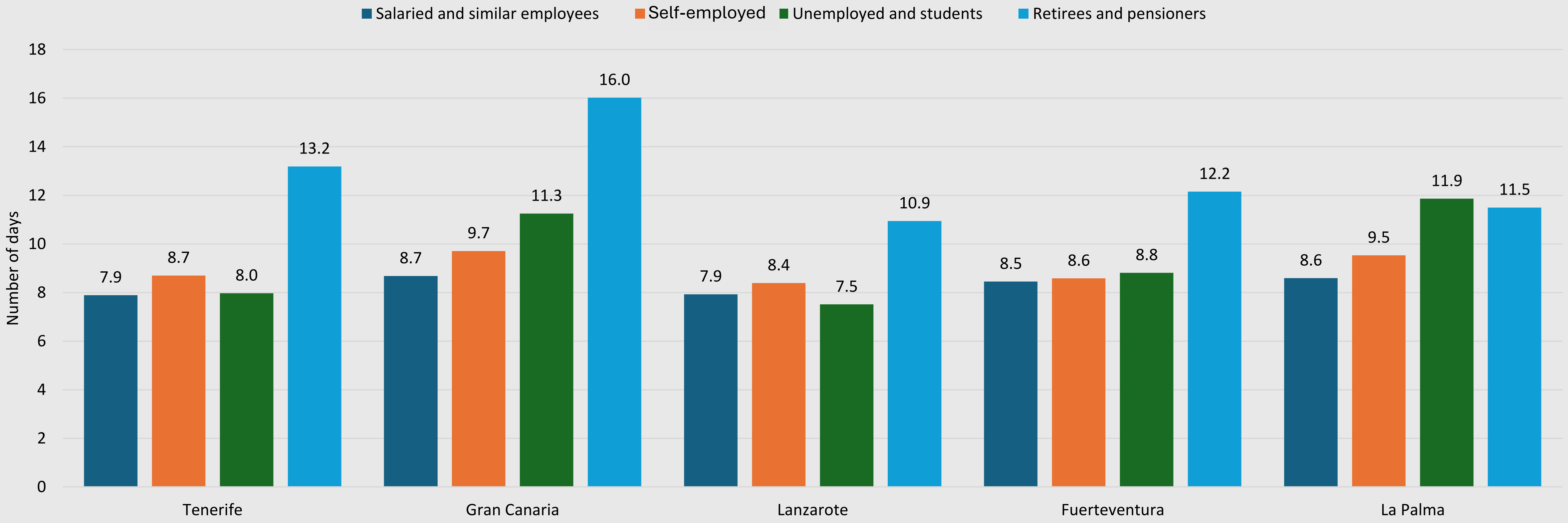
Distribution of retired tourists and pensioners arriving in the Canary Islands by type of accommodation chosen in 2024



Source: Survey on Tourist Expenditure (ISTAC)

With the exception of La Palma, retired tourists and pensioners represent the segment with the longest average length of stay in the archipelago. In some cases, such as Tenerife and Gran Canaria, their length of stay is significantly greater than that of other segments, reflecting a greater tendency among this group to take extended holidays. This behaviour may be linked to the search for a favourable climate and the availability of time after retirement, representing a clear opportunity for the tourism sector.

Average stay of tourists arriving in the Canary Islands by employment situation in 2024

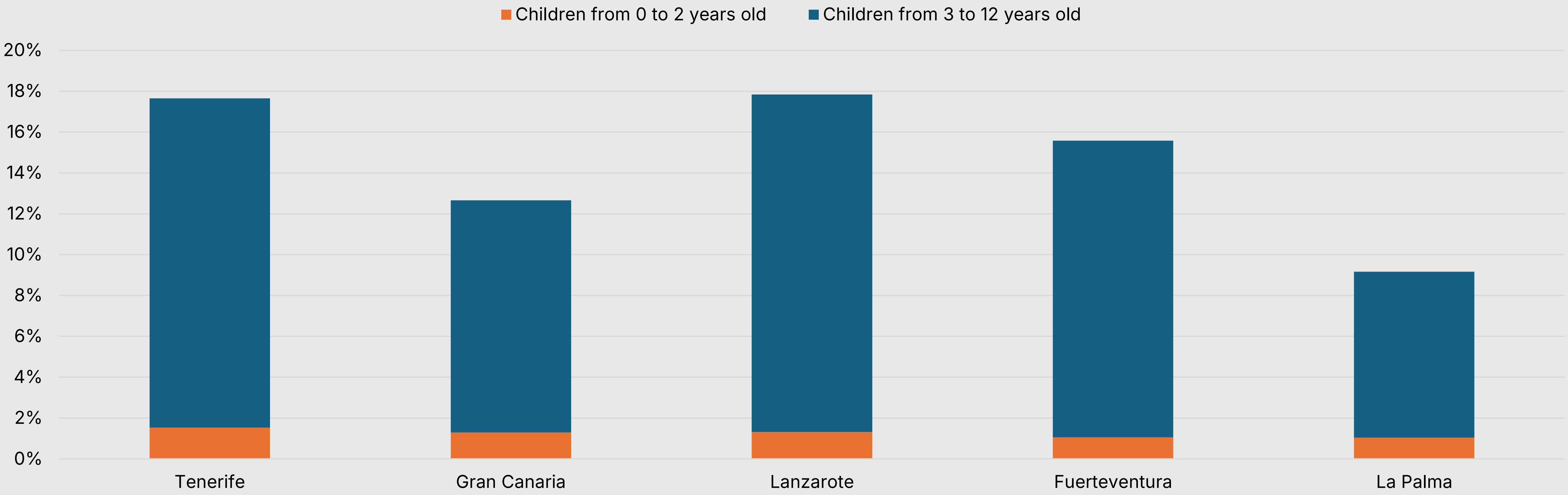


Source: Survey on Tourist Expenditure (ISTAC)

Tourism with children

Lanzarote and Tenerife are the preferred islands for tourists travelling with children, showing a greater tendency to choose these destinations over the rest of the archipelago. In contrast, destinations such as Gran Canaria, Fuerteventura and La Palma record lower numbers of this type of visitor. Family tourism requires specific adaptations to ensure accessibility, particularly in the case of infants under the age of two, who represent 1.4% of all visitors to the archipelago, not including accompanying family members.

Importance of children in tourists arriving on each island in 2024



Source: Survey on Tourist Expenditure (ISTAC)

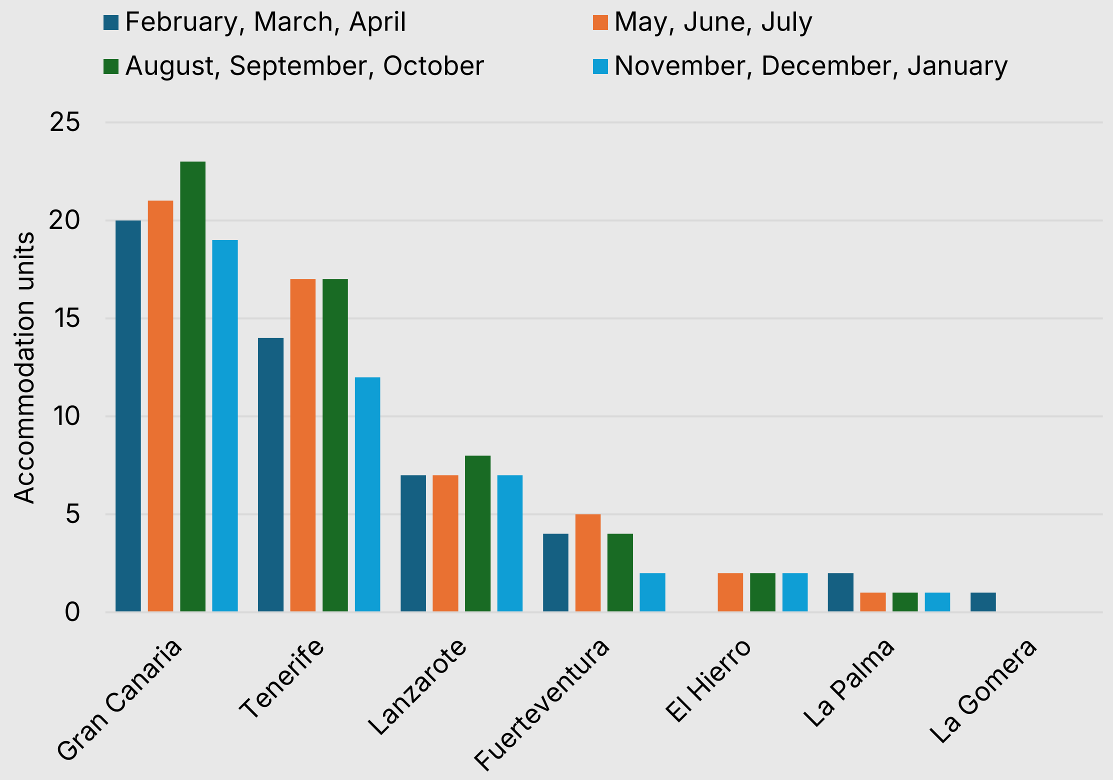
Characteristics of the accessible accommodation offer

The chart shows the total number of accommodation units listed on Booking that offer a set of facilities for people with special needs (toilets with support bars, raised toilets, lower sinks, fully wheelchair-accessible units, and adapted showers).

The capital islands offer a greater number of adapted accommodation units, while El Hierro and La Gomera show the lowest figures. However, the relevance of these numbers should be assessed in relation to the tourism weight of each island.

It can also be observed that the eastern islands (Fuerteventura and Lanzarote) have a higher number of adapted accommodation units compared to the western islands (La Palma, El Hierro and La Gomera).

Adapted accommodation offer available by island on Booking, from February 2025 to January 2026



Source: Own elaboration based on Booking data

Challenges, opportunities and impact of senior tourism in Europe

Senior tourism is a segment that is gaining increasing importance in Europe. Consequently, the European Parliament has published a report, commissioned to a group of experts, which includes the following summary of the challenges, opportunities, and impact of this segment that may serve as a reference in the case of the Canary Islands. Among other aspects, the report highlights the lack of data and research on the subject, the opportunity presented by public programmes such as IMSERSO, and the potential impact on reducing seasonality.

CHALLENGES	OPPORTUNITIES
Ageism and stereotypes	Inclusion training, awareness programmes and universal design
Unappealing marketing	Personalisation of tourism offers
High behavioural diversity	Improved marketing, quality and safety of services
Unmet accessibility needs	Public co-funding programmes to increase access
Unforeseen crises and shocks	Digital technologies to enhance tourism experiences
Sustainable development in tourism destinations	Smart tourism to achieve dual transition
Lack of data and research	Cooperation between stakeholders

IMPACTS	
ECONOMIC	Seasonality reduction, stabilised employment, revenue.
ENVIRONMENTAL	Increased carbon emissions, resource depletion, and habitat degradation
SOCIAL	Increased well-being, life satisfaction
INDUSTRIAL	Inadequate digital accessibility in tourism services

Source: Visionary Analytics. Taken from the report of the European Parliament on the Longevity Economy in the Tourism Sector (2025)

MAIN INDICATORS OF AREA 15

Accessibility and inclusivity

Indicator	Description	Availability	Source	Remarks
Local awareness of the importance of accessibility and inclusion	Level of application of accessibility and inclusion policies.	Unavailable		There is limited availability of information on accessibility indicators.
Accessibility of infrastructures	Proportion 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 adapted to mobility problems and accessible private transport supply.	Occasional data	Hernández-Galán et al. (2021)	
Assured assistance	Local level of health coverage and distance to hospitals or medical centres.	Available	Government of the Canary Islands	

4.16

Governance

Introduction

Governance is a fundamental pillar for ensuring the sustainable development of tourism in the Canary Islands. Good governance enables collective decision-making based on transparency, the participation of key stakeholders, and public–private collaboration. In this context, tourism governance is defined not only by the efficient management of resources and the formulation of comprehensive policies, but also by its ability to foster cohesion among the different levels of administration, stakeholders, and society as a whole.

Very often, the problems faced by the tourism sector are rooted in governance-related issues, such as the lack of coordination and shared objectives between different public administrations, or even between departments within the same institutions; the lack of public–private and private–private cooperation; insufficient stakeholder involvement in issues that directly affect them; a lack of information and accountability regarding implemented actions; and concerns linked to clientelism, lack of long-term vision, irregularities, mismanagement, unnecessary bureaucracy, or opacity. This section examines the progress and challenges in the governance of tourism in the archipelago, acknowledging the difficulties in identifying robust quantitative indicators in this area. Particular attention is given to citizen participation mechanisms, inter-institutional coordination, and efforts to improve public satisfaction with tourism-related services. It is important to highlight the need for better, more accurate and consistent indicators to assess decision-making processes, the quality of coordination among relevant actors, stakeholder engagement, transparency, and accountability, as essential tools for the sustainability and resilience of the tourism destination.

The citizen demonstrations held throughout 2024, during which part of the population expressed discontent with the negative impact of the current tourism development model, should serve as a stimulus to improve the governance mechanisms of tourism in the Canary Islands.

The population's perception of tourism policy

An island-level analysis of the main areas of dissatisfaction among the local population regarding the performance of Public Administrations in tourism reveals that holiday rentals, urban planning, environmental protection, and inspection (both tourism and labour), along with safety and cleanliness, are the most poorly rated aspects across the archipelago. At the island level, Tenerife and, above all, Fuerteventura consistently receive lower ratings than the rest, followed by Gran Canaria and Lanzarote. In contrast, El Hierro, La Palma and La Gomera generally show more favourable assessments than the Canary Islands average.

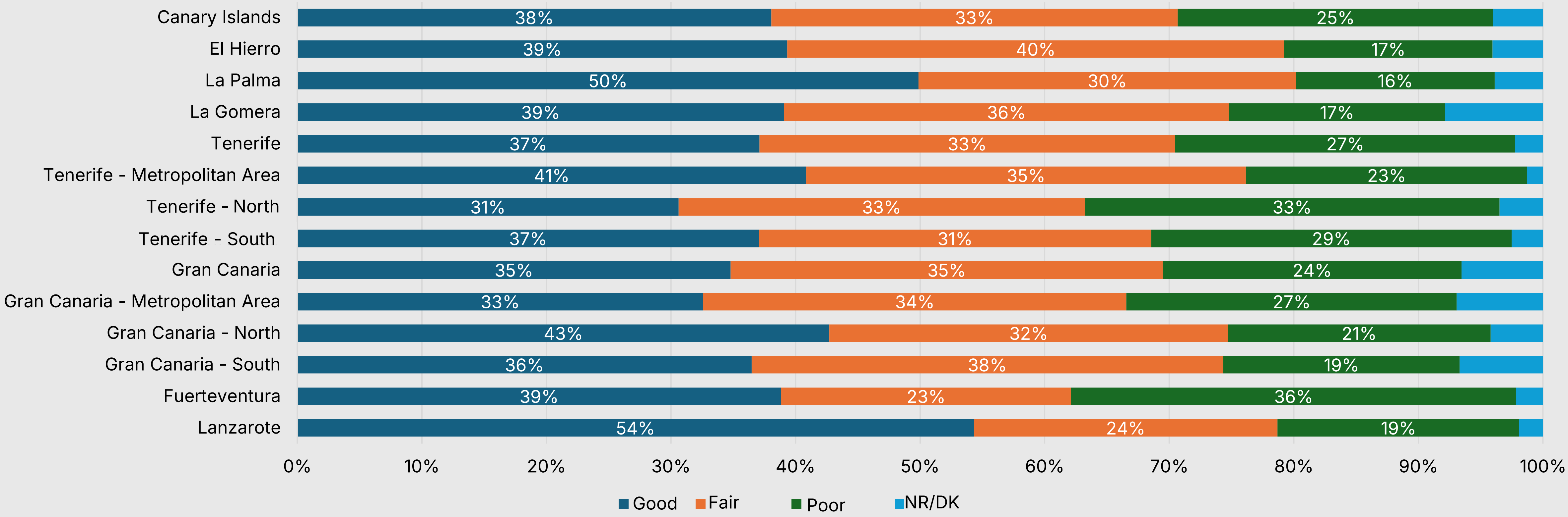
Population aged 18 or over who rate the performance of the Public Administration in certain tourism-related services as bad or very bad (%): second quarter 2024

	CAN	EH	LP	LG	TF	GC	FV	LZ
Specific regulation of vacation housing	50.6%	46.9%	35.6%	41.6%	53.1%	46.7%	59.8%	60.1%
Urban planning related to tourism	32.4%	32.7%	18.3%	28.5%	35.4%	30.2%	36.4%	31.2%
Environmental protection of tourist areas	31.6%	25.6%	17.3%	23.2%	34.2%	30.6%	43.5%	22.2%
Labor inspection of tourism activities	28.9%	22.8%	17.5%	20.4%	29.9%	28.2%	29.9%	33.3%
Inspection of tourist establishments	27.7%	18.1%	12.4%	21.0%	30.5%	25.4%	31.0%	30.4%
Security in tourist areas	25.3%	16.8%	16.0%	17.4%	27.3%	24.0%	35.7%	19.4%
Cleaning and maintenance of tourist areas	24.2%	18.6%	15.0%	19.3%	23.8%	25.4%	35.9%	17.6%
General regulation of tourism activities	23.7%	21.5%	14.7%	17.0%	26.7%	21.2%	28.5%	21.6%
Taxation applicable to tourism activities	19.1%	16.4%	10.2%	16.1%	21.7%	17.9%	16.8%	17.2%
Training related to tourism	16.2%	10.6%	17.2%	16.2%	17.7%	14.7%	17.4%	15.3%
Tourism infrastructure	15.8%	10.5%	11.5%	18.0%	14.6%	17.1%	22.3%	13.9%
Cultural promotion related to tourism	15.9%	11.9%	11.6%	11.9%	16.6%	15.2%	23.2%	13.4%
Tourism promotion	14.9%	11.0%	9.5%	10.6%	15.7%	14.8%	18.0%	12.1%
Management of museums and cultural spaces for tourism	12.6%	7.9%	9.4%	11.2%	13.3%	11.0%	24.5%	9.7%

Note: CAN, Canary Islands; EH, El Hierro; LP, La Palma; LG, La Gomera; TF, Tenerife; GC, Gran Canaria; FV, Fuerteventura; LZ, Lanzarote. Those aspects on each island whose difference with respect to the average for the Canary Islands exceeds 5 percentage points have been highlighted in green (lower values) and red (higher values), except for Tenerife and Gran Canaria, with 2.5 percentage points. Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

Lanzarote and La Palma lead in positive assessments of Public Administration performance in areas related to safety, with 54% and 50% respectively. Fuerteventura stands out for the highest level of dissatisfaction, with 36% negative ratings. Overall, 38% of respondents in the Canary Islands consider the management to be good, while 25% view it as poor, highlighting a clear margin for improvement.

Assessment of the Public Administration's performance in relation to security in tourist areas (%) in 2024



Note: The “Good" and “Poor" categories correspond to the sum of the responses "Very Good" and “Good", and “Poor" and "Very Poor", respectively. Source: Survey of Socioeconomic Habits and Trust (ECOSOC) (ISTAC)

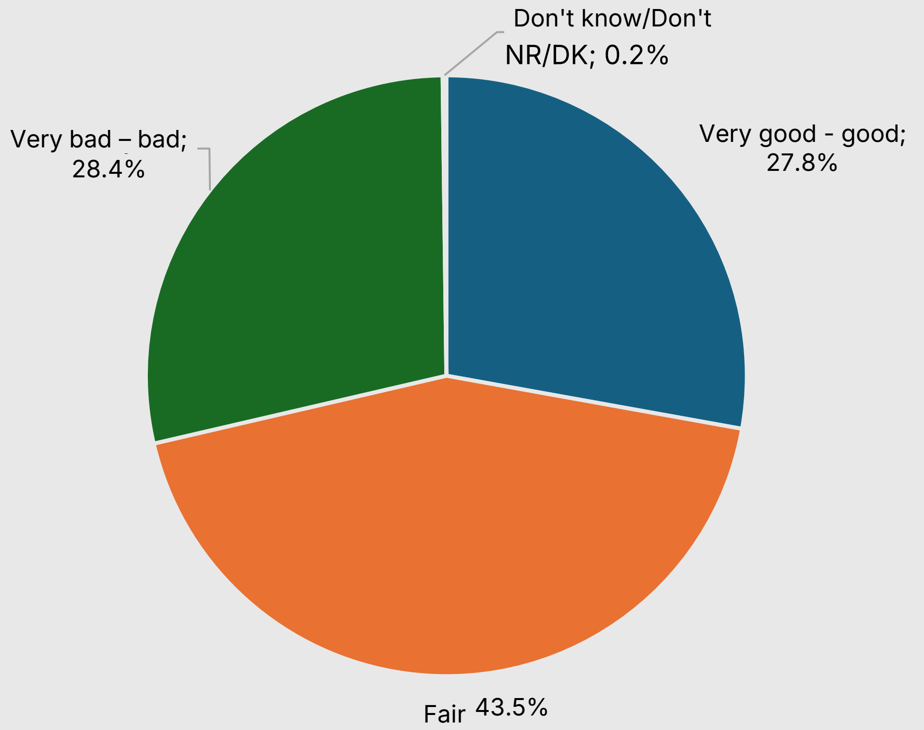
Perception of socio-economic and tourism aspects

The perception of the economic situation among the resident population in the Canary Islands predominantly falls under the category of "fair", with 43.5% of respondents selecting this option. This suggests that, although there is no prevailing sense of crisis, there is also no widespread perception of clear improvement in the current economic landscape. The remainder of the population is evenly divided between those with a positive outlook and those with a negative one: 27.8% rate the economy as "good" or "very good", while 28.4% describe it as "poor" or "very poor". This reflects the persistence of structural challenges in the island economy, such as job insecurity and the high cost of living.

These findings are consistent with recent economic trends in the Canary Islands, where a recovery has been observed following the crisis triggered by the pandemic and other external factors, although structural barriers continue to limit broader improvement.

The post-pandemic economic recovery of the islands should serve as a stimulus to deepen long-term policies that address persistent structural issues, such as mobility, education and skills, lack of entrepreneurship, access to housing, and sustainability—particularly in the tourism sector—in order to build a more resilient economy.

Assessment of the current economic situation of the island of residence in 2024



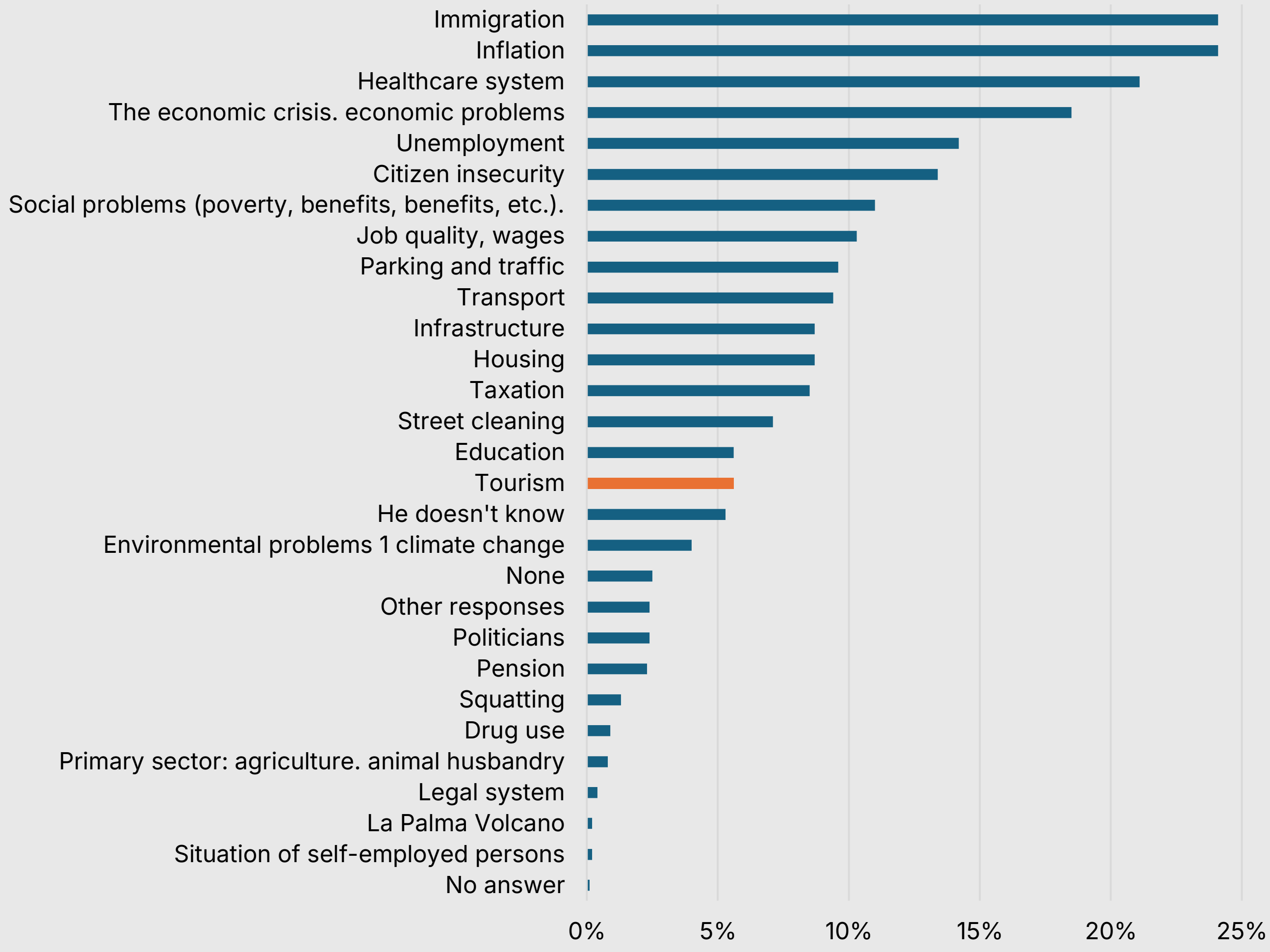
Source: Sociobarometer of the Canary Islands (November 2024). UNED Gran Canaria Fieldwork carried out in October 2024

The perception of the main problems affecting households in the Canary Islands reveals significant concern about economic and social issues, with immigration, inflation, and the healthcare system identified as the most pressing matters. This suggests that, while tourism remains the cornerstone of the regional economy, its direct impact on residents' daily lives is not perceived as among the most urgent problems. In fact, tourism-related issues are cited by only 5.6% of respondents.

The high level of concern regarding inflation and structural weaknesses in the labour market highlights the need to strengthen economic diversification and improve employment conditions within the tourism sector, which is often characterised by temporary contracts and low wages. Moreover, the prominence of healthcare as a key concern underscores the necessity for tourism-generated revenues to contribute more directly to the reinforcement of public services and the enhancement of residents' quality of life.

This context makes it clear that tourism sustainability in the Canary Islands must be aligned with addressing other structural challenges in the archipelago. The pursuit of sustainability cannot be confined to environmental concerns alone; it must also encompass social cohesion and the economic well-being of the population.

Main problems affecting Canarian households (three possible answers) in 2024



Source: Sociobarometer of the Canary Islands (November 2024). UNED Gran Canaria Fieldwork carried out in October 2024

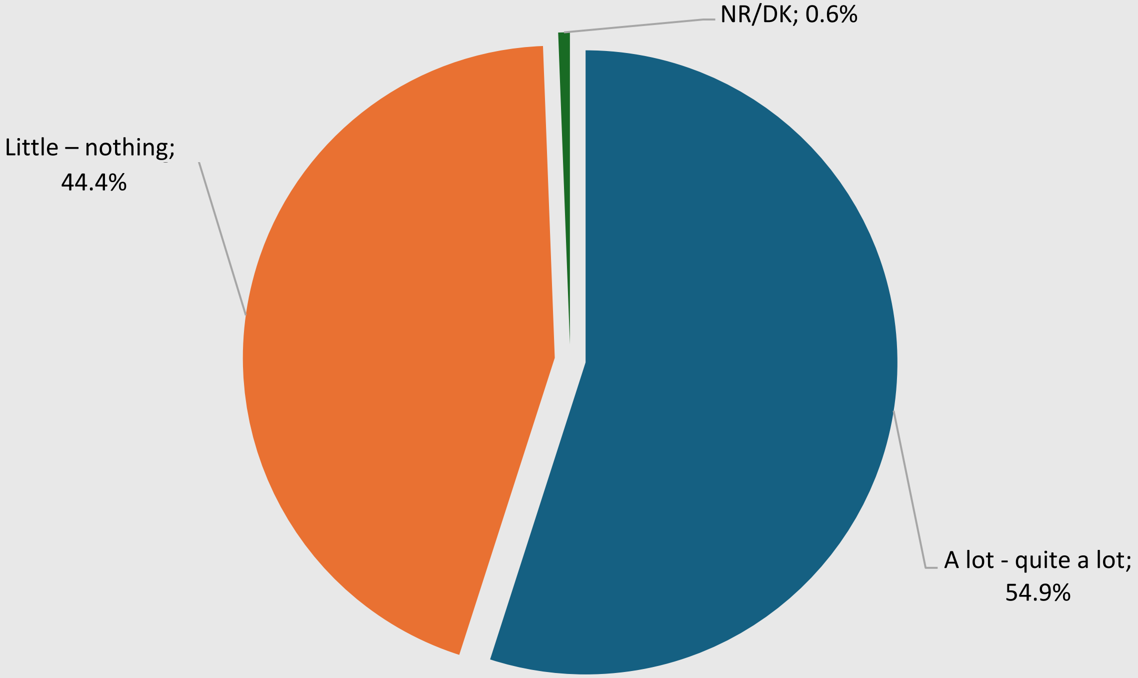
Assessment of environmental aspects

The level of concern among the Canarian population regarding the environment and climate change reveals a significant divide in public opinion. While 54.9% of respondents report being “very” or “fairly” concerned about these issues, 44.4% state that their concern is “low or non-existent”. This outcome indicates that, although environmental awareness exists within society, a considerable portion of the population does not perceive these matters as a priority in their daily lives.

From a sustainability perspective, these findings point to the need to strengthen environmental awareness strategies and to promote more visible and effective public policies in the fight against climate change. Despite the Canary Islands’ vulnerability to extreme weather events and the pressures tourism places on ecosystems, public perception still does not reflect a clear consensus on the urgency of the issue.

Institutions must work to improve the connection between sustainability policies and the citizenry, ensuring that the benefits of ecological transition are understood and valued across all sectors of society. The absence of a broader concern for the environment may hinder the implementation of necessary measures to protect the territory and adapt to climate change.

Degree of concern about the environment and climate change (2023)



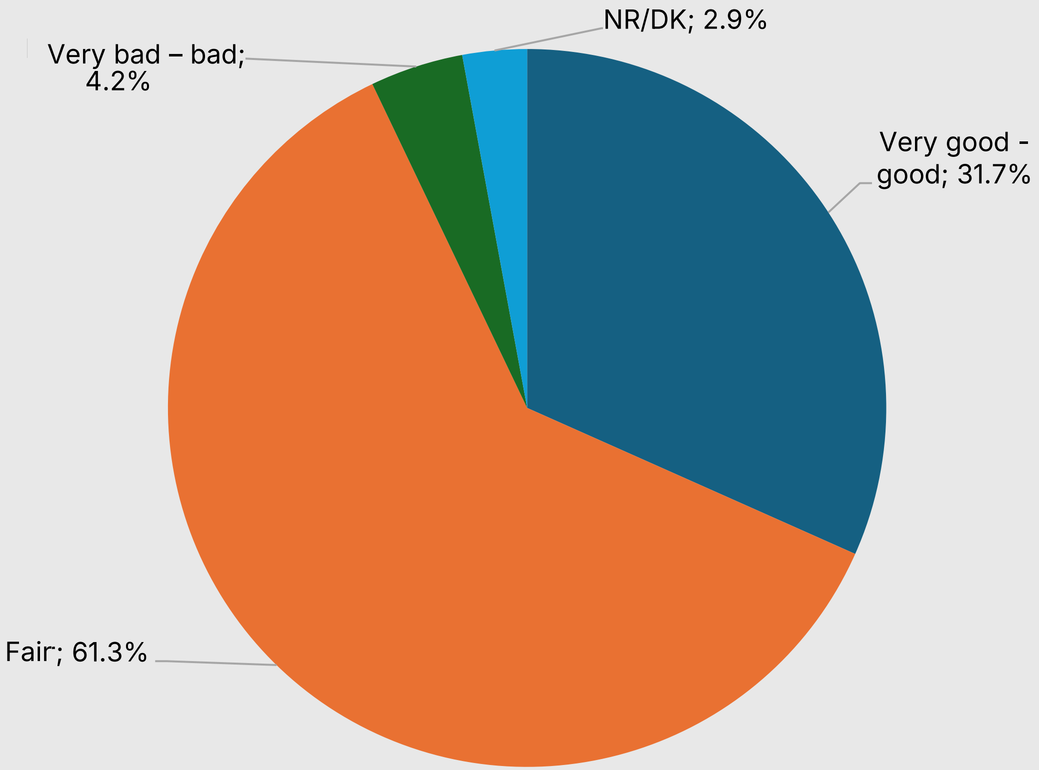
Note: There is no information on this aspect for 2024. Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria Fieldwork carried out in October 2023

The perception of the environmental situation in the Canary Islands is a key indicator within the analysis of tourism sustainability, as it reflects how the local population assesses the balance between tourism activity and environmental conservation. In this regard, the fact that 61.3% of respondents rate the environmental quality as “fair” suggests that, while serious issues are not perceived on a widespread basis, there is also no strong recognition of excellence in environmental management. This may be linked to the pressure exerted by population growth and tourism on ecosystems, waste management, or urban development in sensitive areas.

Conversely, the 31.7% who positively assess the environmental situation indicates that part of the population acknowledges the efforts made in conservation and environmental protection within the tourism context. However, the low proportion of respondents who rate the situation as “very good” suggests that such progress is either insufficient or not visible enough to generate a broadly favourable perception.

The small share—4.2%—who rate the situation as “poor” or “very poor” indicates that the most critical environmental problems are not perceived as widespread, but may nonetheless be affecting specific areas under high tourism pressure, such as protected natural spaces or coastal zones with high visitor density. From a tourism sustainability perspective, this underscores the importance of reinforcing policies aimed at mitigating the environmental impacts of the sector.

Assessment of the current environmental situation on your island (2023)



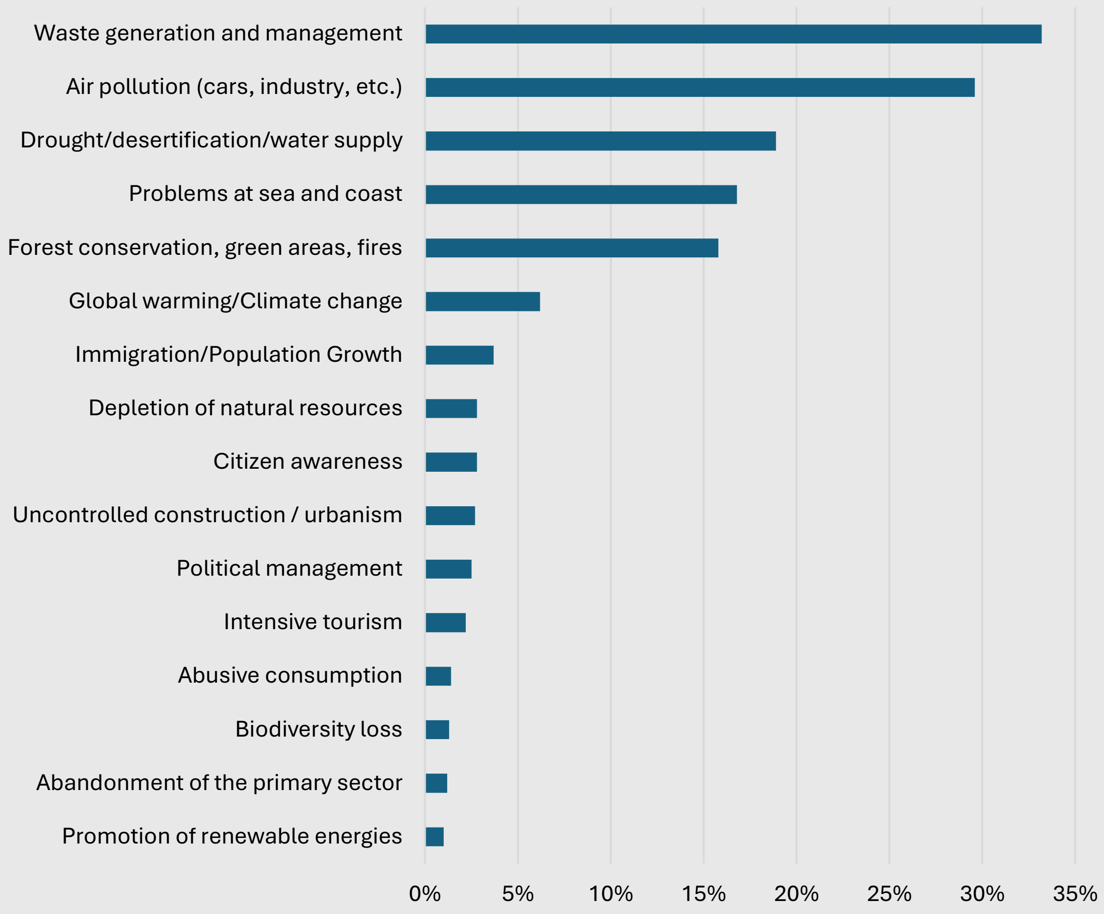
Note: There is no information on this aspect for 2024. Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria Fieldwork carried out in October 2023

Data from the Canary Islands Socio-Barometer, based on fieldwork conducted in November 2023, indicate that the environmental issues of greatest concern to the population are primarily related to waste management and air pollution. Waste management and generation lead the responses with 33.2%, suggesting that recycling, collection, and treatment infrastructure remain a central concern across the archipelago. This perception may be linked to the visual and environmental impact of landfills, inadequate waste separation, or the difficulty of implementing circular economy models in a fragmented territory such as the Canary Islands.

Air pollution, cited by 29.6% of respondents, ranks as the second major environmental concern. This is likely influenced by the frequent occurrence of *calima* episodes (Saharan dust intrusions), as well as emissions from road traffic and economic activity in certain areas. In the context of ecological transition, this figure underscores the need to advance sustainable mobility policies and reduce pollutant emissions.

Notably, intensive tourism was identified as a concern by only 2.2% of respondents. This suggests that, although the sustainability of the tourism model is a topic of public debate in some sectors, the general population does not perceive it as a top environmental priority. However, this may be due to the fact that tourism-related environmental impacts are perceived as part of broader issues, such as urban sprawl, pressure on natural resources, or waste generation.

Top environmental issues on your island in 2023



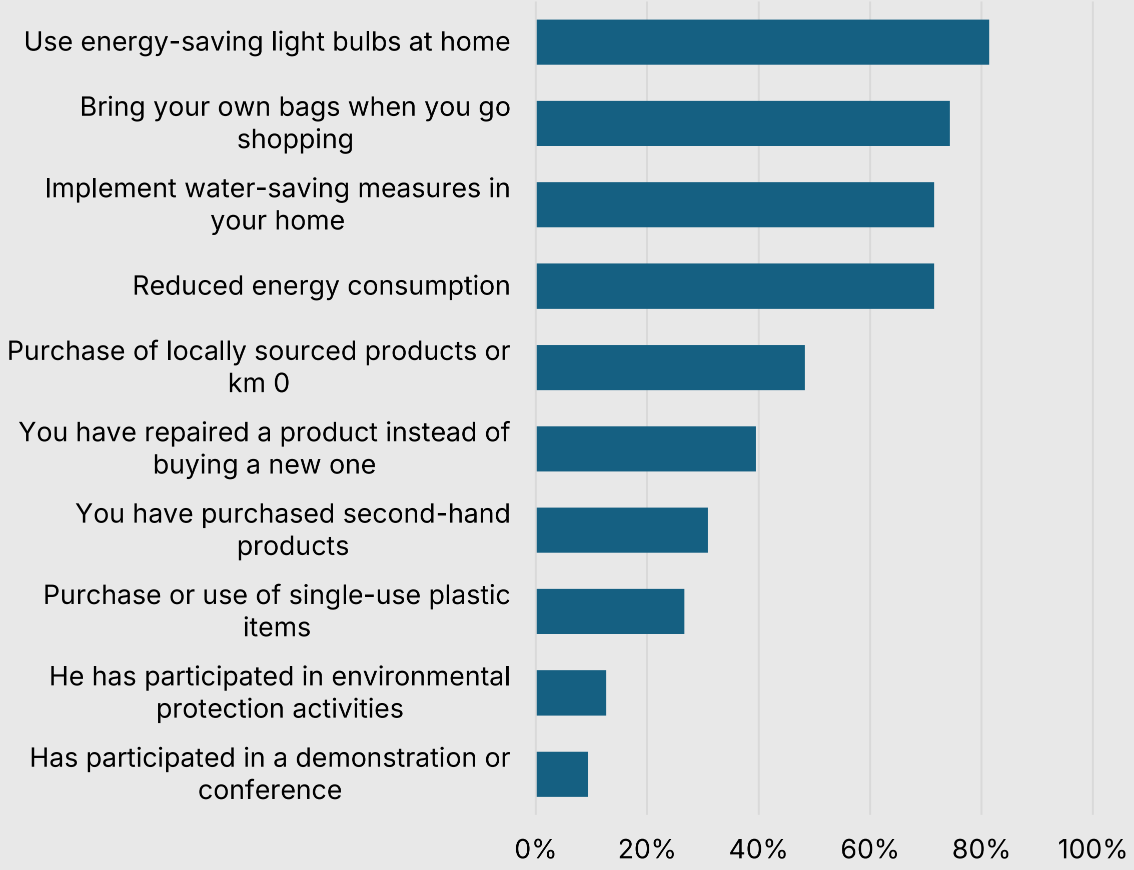
Note: There is no information on this aspect for 2024. Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria Fieldwork carried out in October 2023

The data show that the population of the Canary Islands primarily adopts sustainability measures within the domestic sphere, such as the use of energy-saving light bulbs (81.4%), reducing water and energy consumption, and using reusable shopping bags. However, behaviours such as purchasing second-hand products or repairing items instead of buying new ones remain marginal.

In contrast, participation in collective or higher-impact actions is significantly lower. Engagement in environmental demonstrations or awareness events is minimal (9.4%), although it is worth noting that the data were collected prior to the large-scale protests against the impact of mass tourism that began in April 2024, which may have since altered public perceptions.

This behavioural pattern suggests that while there is a degree of environmental awareness in daily life, there is still substantial room to encourage greater engagement in tourism sustainability. The tourism sector is one of the main sources of environmental impact in the Canary Islands, from waste management to natural resource consumption. Achieving more sustainable tourism requires strengthening citizen participation in awareness-raising initiatives, responsible consumption within the tourism context, and the promotion of more balanced development models. Sustainability policies in tourism cannot rely solely on government regulation or corporate adaptation; they must involve the active engagement of the local population, tourism workers, and the tourists themselves.

Actions for the conservation of the environment carried out by the population of the Canary Islands in the previous six months



Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria
Fieldwork carried out in October 2023

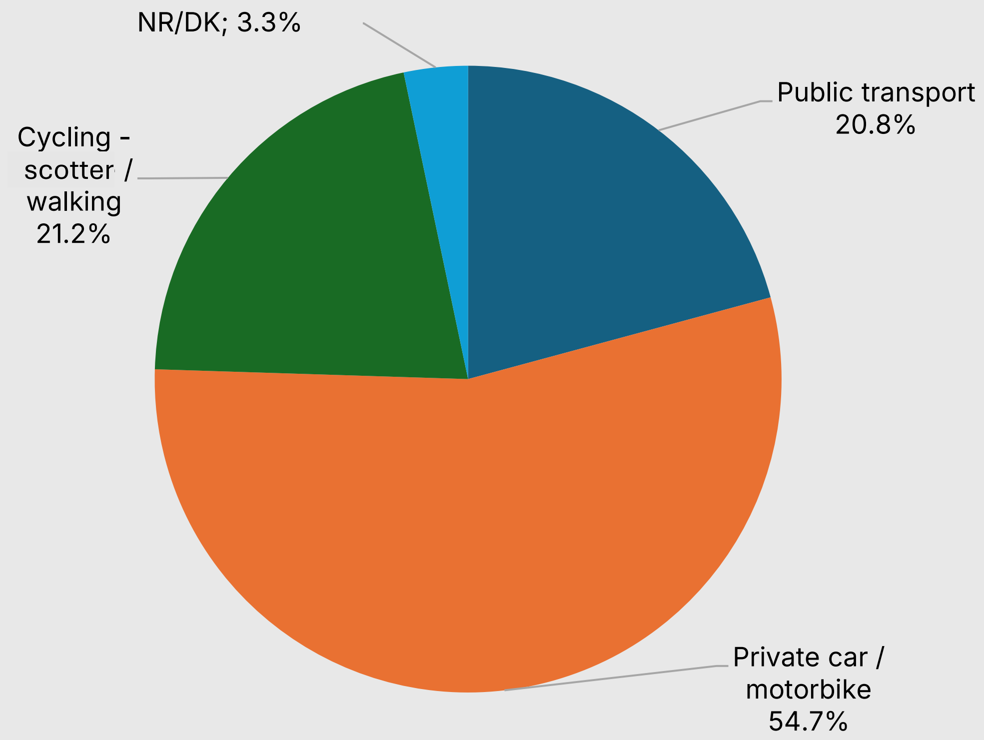
Perception of mobility

The data reflect a strong reliance on private vehicles in the Canary Islands, with 54.7% of the population using cars or motorbikes for their daily travel. This preference for individual mobility presents a significant challenge to transport sustainability in the archipelago, due to its implications for road congestion and environmental impact.

Public transport, with a usage rate of 20.8%, remains an underutilised alternative compared to other mobility options, highlighting the need to improve its accessibility, frequency, and efficiency in order to attract a larger number of users. In parallel, 21.2% of the population opts for more sustainable modes such as cycling, electric scooters, or walking—figures that could increase with supportive policies promoting active mobility and adequate infrastructure.

In the context of sustainable tourism, this distribution of transport modes is also relevant, as the high dependence on private vehicles among residents is mirrored in tourist mobility patterns. The expansion of shared mobility options, the strengthening of public transport, and the development of infrastructure that supports sustainable mobility are key to reducing tourism's environmental footprint and enhancing quality of life across the islands.

Transport use by population (November 2023)

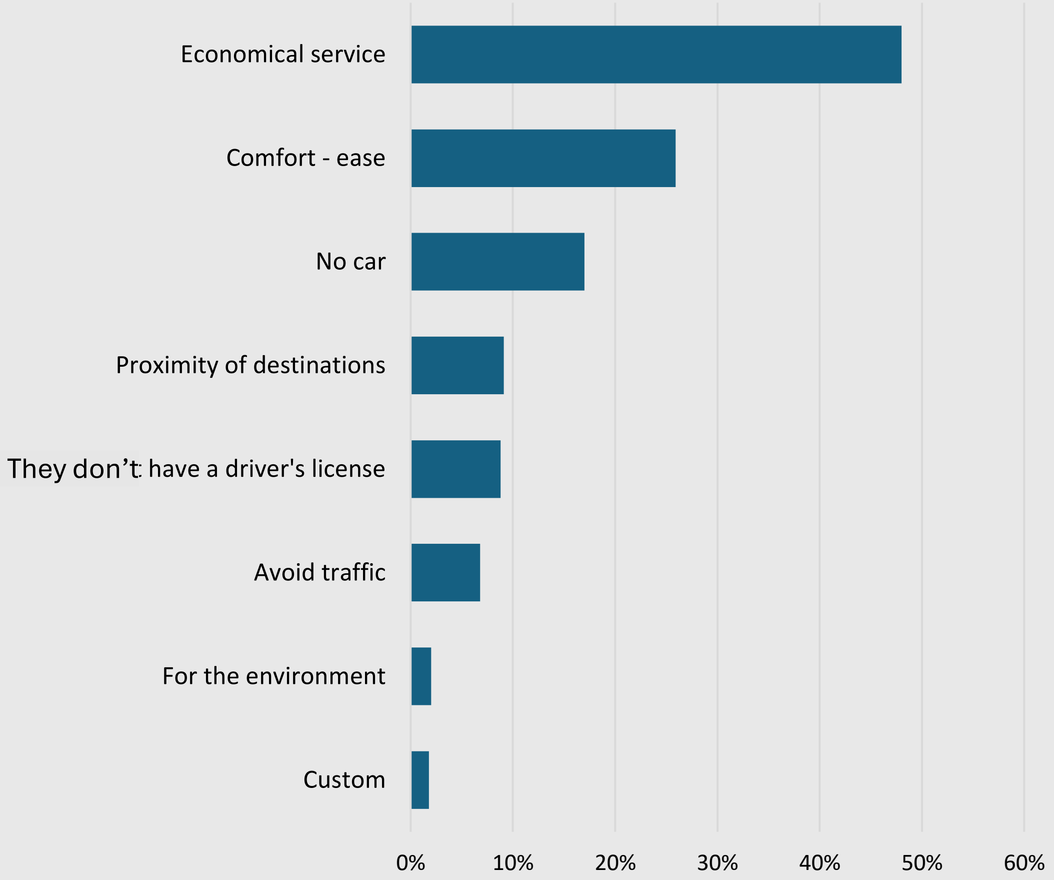


Source: Sociobarometer of the Canary Islands (November 2023). UNED Gran Canaria Fieldwork carried out in October 2023

The use of public transport for economic reasons, cited by 48% of public transport users in the Canary Islands, has key implications for island planning and sustainability. It suggests that rising income levels could lead to a decline in the use of this mode of mobility. Many employees in hotels, restaurants, and other tourism-related activities depend on public transport for their daily commutes, underscoring the need for a system that is efficient, accessible, and adapted to atypical working hours.

The fact that only 2% of respondents mention environmental reasons as their motivation for using public transport indicates that environmental awareness in mobility choices remains low. This poses a challenge for the implementation of sustainable tourism mobility policies, as the demand for ecological solutions or incentives to reduce private car use is still limited. Such policies must prioritise improving the quality and coverage of public transport in order to offer a genuine alternative to private vehicles. This is particularly relevant in tourist destinations where congestion and car dependency affect both residents and visitors. Without an attractive public transport system, sustainable mobility policies in tourism will face major barriers to effective implementation.

Reasons for the use of public transport in mobility



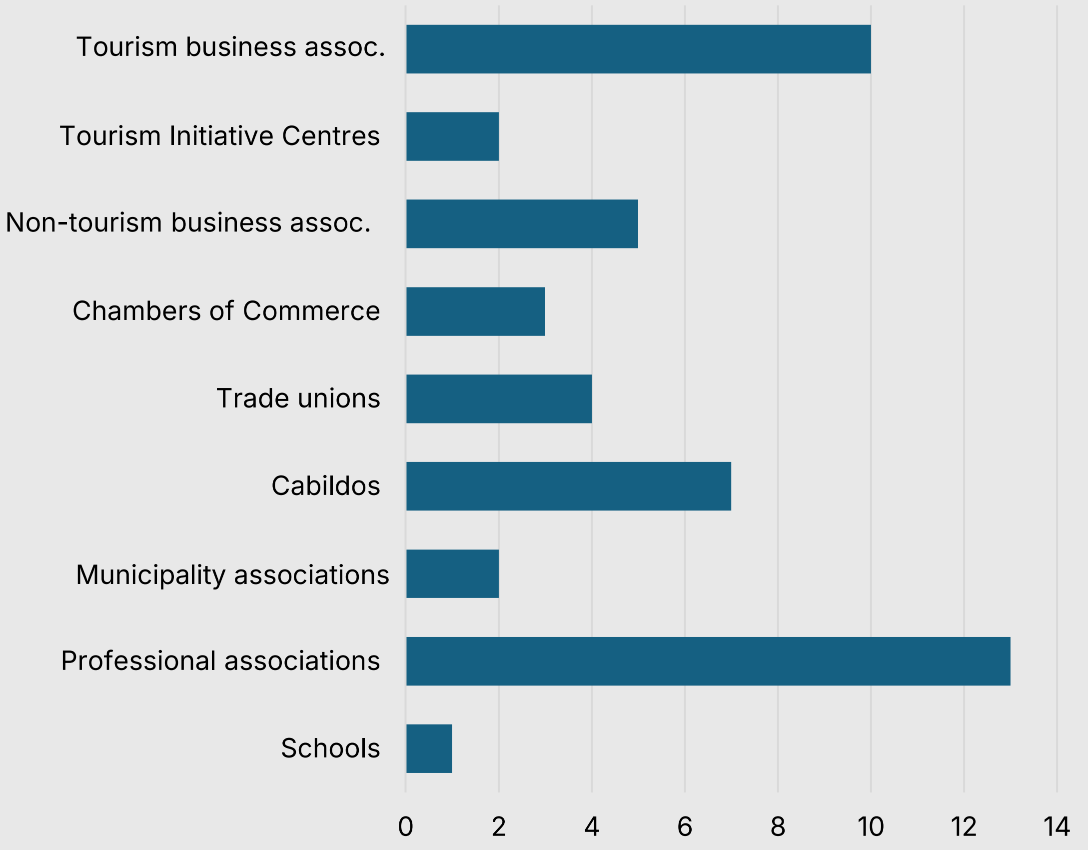
Note: response from public transport users, 20.8% of the total. Source: Sociobarometer of the Canary Islands (Nov. 2023). UNED Gran Canaria. Fieldwork Sept. - October 2023

Proposed law on short-term rentals

The Draft Law on the Sustainable Planning of the Tourist Use of Housing notes in its report on submitted allegations that the category of organisations presenting the highest number of objections were professional associations, with a total of 13.

They were followed by tourism business associations, which submitted 10 objections, representing associations from across all the islands of the archipelago. The island councils also contributed a significant number of objections to the draft law, submitting a total of 7.

Number of allegations made by organisations



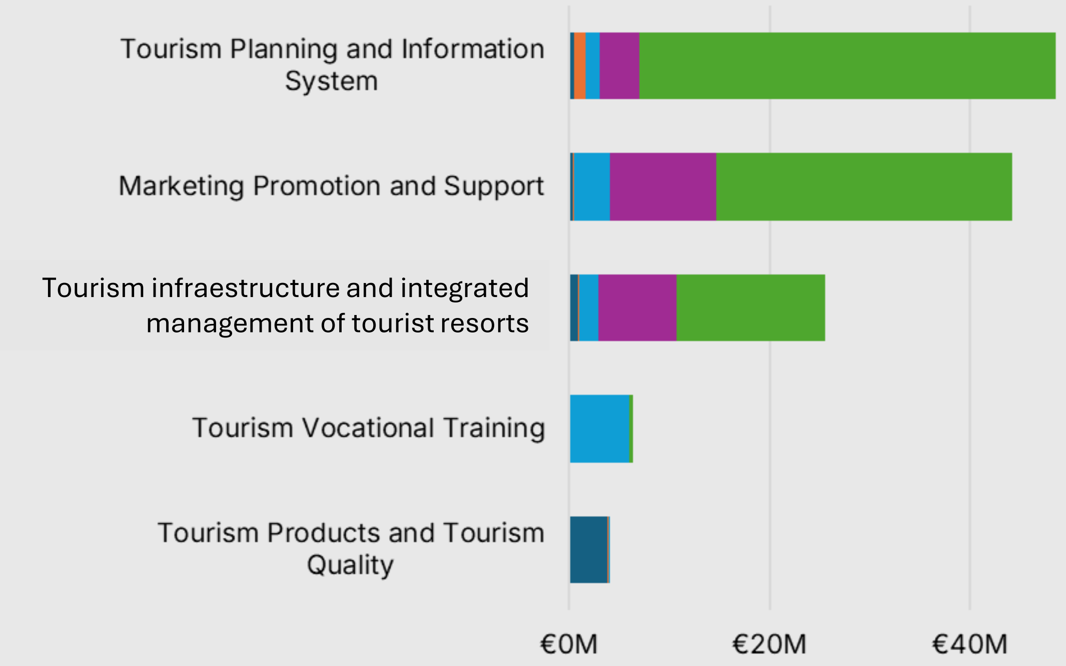
Source: Prepared by the authors using data from the Parliament of the Canary Islands

Tourism budget of the Government

The budget of the Ministry of Tourism and Employment of the Government of the Canary Islands for 2025 amounts to €244 million. Within the tourism sector, the Directorate-General for Infrastructure, Sustainability and Tourism Quality will manage €25.5 million.

The Directorate-General for Tourism Planning, Training and Promotion will have a budget of €54.6 million, which includes €15 million allocated to strategic Promotur campaigns and €5.3 million for the Canary Islands' Hotel Schools.

Main programmes of the budget of the Government of the Canary Islands in the field of tourism 2025



Source: Government of the Canary Islands

Current legislative initiatives in the field of tourism

The current political legislature, running approximately from May 2023 to May 2027, is characterised by extensive legislative activity in the tourism sector. Updating the legislative framework for tourism in the Canary Islands was necessary to address the challenges faced by a mature destination, including social, environmental, and economic sustainability, protection of the island territory, and the well-being of residents. Previous legislation was considered insufficient to meet the sector's new challenges and to adapt the regulations to current realities, including changes arising from case laws and national legislation. Additionally, the reform aims to simplify and modernise regulations, aligning public policies with the new demands of both the tourism sector and Canarian society. The main initiatives are as follows:

New Tourism Law of the Canary Islands: Currently under development to replace Law 7/1995, of April 6, on the Regulation of Tourism in the Canary Islands. Its goal is to establish an updated regulatory framework that addresses sustainability, territorial protection, and resident welfare. The law is expected to unify and modernise tourism regulation, integrating aspects of Law 2/2013, of May 29, on the Renewal and Modernisation of Tourism in the Canary Islands. It is undergoing a participatory process that includes working groups organised by the Chair of Tourism of the Canary Islands on Sustainability and Data Intelligence, involving key sector stakeholders and held at the two public universities of the Canary Islands to gather input for its drafting.

Draft Law on the Sustainable Regulation of Tourist Use of Housing: This legislative initiative aims to establish a specific regulatory framework for the tourist use of housing in the Canary Islands. The draft law clearly defines tourist-use housing, sets registration requirements, and establishes minimum standards for quality, accessibility, and safety for their operation.

Decree-Law 2/2025, of March 17: This decree establishes urgent measures concerning the obligation to comply with tourist use regulations and modifies Law 2/2013, of May 29, on the renewal and modernisation of tourism in the Canary Islands, and its Regulation approved by Decree 85/2015, of May 14. The objective is to address tensions between tourist and residential use of properties in tourist areas of the Canary Islands, in the context of the housing emergency affecting the archipelago.

Amendment to Decree 226/2017, of November 13: This decree approved the regulation establishing the legal framework for the development of active tourism activities. Currently in the drafting phase after prior consultation, it aims to update regulations on active tourism activities to respond to new demands and ensure the safety and quality of the offerings.

Draft Regulation for Outdoor Tourist Establishments: In the public consultation phase. This pioneering regulation in the archipelago will, for the first time, regulate campgrounds, camping areas, and overnight parking zones for motorhomes, establishing quality standards, services, accessibility, and environmental protection requirements.

Governance

Indicator	Description	Availability	Source	Remarks
Effectiveness of government	It reflects the perception of the quality of public services that involve the areas included in the tourism system, the quality and preparation of policy formulation and its execution, as well as the credibility of the Public Administration.	Partially available / occasional	Survey of Socioeconomic Habits and Confidence - ECOSOC (ISTAC) Public Administrations and Citizen Participation	Indicators needed
Participation	It reflects the level of inclusion of the different stakeholders in the decision-making of the territory's tourism system, measured through the mechanisms of representative and informal organisation, the perception of effectiveness, etc.	Partially available / occasional	Survey of Socioeconomic Habits and Confidence - ECOSOC (ISTAC) Public Administrations and Citizen Participation	Indicators needed
Communication and accountability	It reflects the means and quality of communications between stakeholders, including the different levels of the Public Administration; the fulfilment of the commitments acquired according to the levels of responsibility, the existence of efficient mechanisms for the promotion of training, employment, gender equality and innovation.	Unavailable		Indicators needed

5.

Conclusions

Conclusions

This report presents, in an organised manner, the available information regarding the sustainability of tourism in the Canary Islands in 2024. There is no doubt that sustainability currently represents the core challenge for tourist destinations. The Canary Islands are facing this challenge as a leading and competitive destination, maintaining a strong capacity to attract both international and domestic visitors, with high levels of satisfaction and repeat visits. This strength is grounded in the effective management of productive resources that are essential for the development of tourism activity.

In 2024, the Canary Islands once again recorded an increase in the total number of tourists, reaching 17,767,833, thus surpassing pre-pandemic levels. Tourist expenditure also increased, both in nominal and real terms, both in aggregate and per tourist per day. The number of overnight stays in hotels and apartments rose to 100,227,490, a figure that, in all likelihood, will once again position the Canary Islands as the leading European destination according to this annual indicator. Profitability indicators for hotels and apartments have also improved significantly, driven by an increase in average room occupancy to 82.3%, and a rise in revenue per available room (RevPAR) to €98.22.

However, as this report highlights, sustainability does not solely refer to the achievements in economic terms, which, while necessary, are not sufficient to ensure the long-term viability of the activity. Sustainable tourism must be understood as a balance between economic, social and environmental dimensions, in such a way that all elements of the tourism system evolve towards higher quality standards, without falling behind in their contribution to improving well-being. Achieving these balances requires thorough measurement, through appropriate environmental indicators, of all dimensions and facets of sustainability, from human and social aspects to environmental and territorial conditions, pressures on public and private infrastructure, and limits to heritage and cultural environments.

On the social front, 2024 has been marked by the emergence of public demonstrations against tourism and overcrowding, under the banner of the "The Canary Islands have a limit" movement. These demonstrations have, in part, brought to the fore the need for greater sensitivity from the tourism sector towards the local society, reinforcing the transversal social benefits for all citizens.

The complaints voiced by certain social groups have stemmed from the discomfort generated by issues such as housing scarcity and affordability, inflation, and wages below the national and European averages. Tourism in the Canary Islands coexists with the reality that this is still a region with a standard of living below the Spanish average, although the relative indicators of exclusion and poverty have shown improvement over the past year.

The issue of access to housing for the resident population has been attributed to the proliferation of holiday rental properties, which has prompted the drafting of the Law on the Sustainable Planning of the Tourist Use of Housing. This legislative initiative seeks to strike a balance between tourism activity and the right to housing, while also aiming to mitigate the pressure that the expansion of holiday rentals is exerting on public services and the urban environment. However, addressing the housing issue must also involve increasing the overall supply and planning investments that meet the needs of the resident population.

In relation to tourism's necessary acknowledgement of the limitations of natural and environmental resources, it is important to highlight the efforts made by the destination to advance in the "journey towards decarbonisation", with the objective of accelerating the reduction of carbon emissions in line with the Glasgow Agreement. Nonetheless, the unavoidable challenge of the Canary Islands' heavy reliance on long-haul transport for tourist arrivals makes reducing the carbon footprint particularly difficult and requires the design of specific mitigation strategies.

Meanwhile, energy transition remains at an early stage, with mobility still heavily dependent on fossil fuels. More than 50% of the resident population prefers private vehicles over public transport, which remains underutilised. This contributes to road congestion and emissions and undermines the sustainability of mobility for both tourists and residents.

Moreover, modern and efficient solid waste management remains an unresolved issue in the Canary Islands. Despite certain advances, over 90% of waste is still sent to landfill, highlighting the urgent need to improve treatment infrastructure and progress towards a circular economy. It is essential to enhance waste traceability and to introduce incentives that encourage sustainable practices within the private sector. In terms of governance, it must be noted that the public management of tourism sustainability continues to be fragmented and lacks an integrated approach that would allow for the coordination of actions across different levels of administration. The absence of a robust system of indicators and a shared vision between regional and local authorities hampers the effectiveness of sustainability policies. Inter-institutional cooperation and citizen participation in tourism governance are still insufficient. The lack of platforms for dialogue and the limited integration of local communities into decision-making processes weaken the social legitimacy of public policies related to tourism.

The future sustainability of tourism in the Canary Islands will depend on the archipelago's capacity to transform its current model into one that simultaneously ensures the well-being of the resident population, the conservation of the environment, and economic competitiveness. Only through an ecologically and socially just transition will it be possible to consolidate a resilient tourist destination aligned with the Sustainable Development Goals.

6.

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Canary Islands Tourism Sustainability

Report 2024

Tourism Observatory of the Canary Islands

Cátedra de Turismo de las Islas Canarias de Sostenibilidad e Inteligencia de Datos

Gobierno de Canarias

ULPGC Universidad de Las Palmas de Gran Canaria

Universidad de La Laguna

UNWTO INSTO

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