

# Improving the **connectivity** of **Canary Islands**

---

**WORLD ROUTES MARKETING  
AWARDS 2022**

CANARY ISLANDS  
TOURIST BOARD · PROMOTUR

Marketing Awards 2022 SHORTLISTED

---



Canary  
Islands   
LATITUDE OF LIFE





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

- Country: **Spain**
- Distance from European continent: **1500km**
- Ultra peripheral region of **Europe** made up of **8 islands**
- **Tourism up to 40% of GDP and Employment**



The **economic development** of Canary Islands has always been linked to the **improvement in connectivity**, with the aim of **bringing the islands closer to the world**





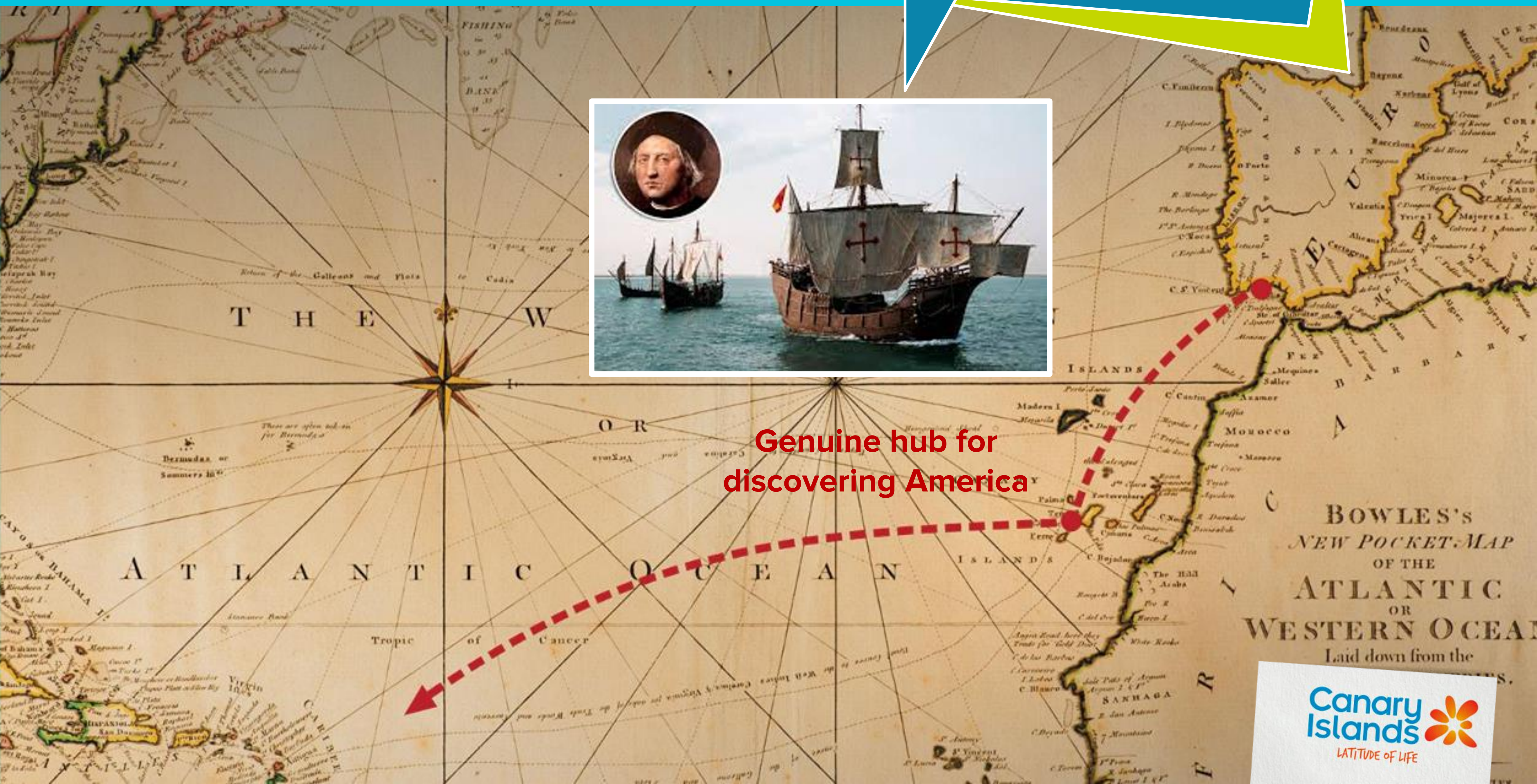
# YESTERDAY

## Promoting maritime transport and exploiting our strategic position

On Columbus' first expedition to America, this was his last European port of call



Genuine hub for  
discovering America





**TODAY**

Focusing on **air connectivity**:

An average of **1,000 flights** “arriving in” or “departing from”  
Canary Islands **every day**

Up to  
**1,500**  
flights on peak  
days





# Route Development Strategy:

RESULTS AND  
EFFECTIVENESS





Canary Islands was one of the **first** **tourist destinations in the world** in **recovering pre-pandemic capacity levels**

**+7%**

W2122 vs W1920

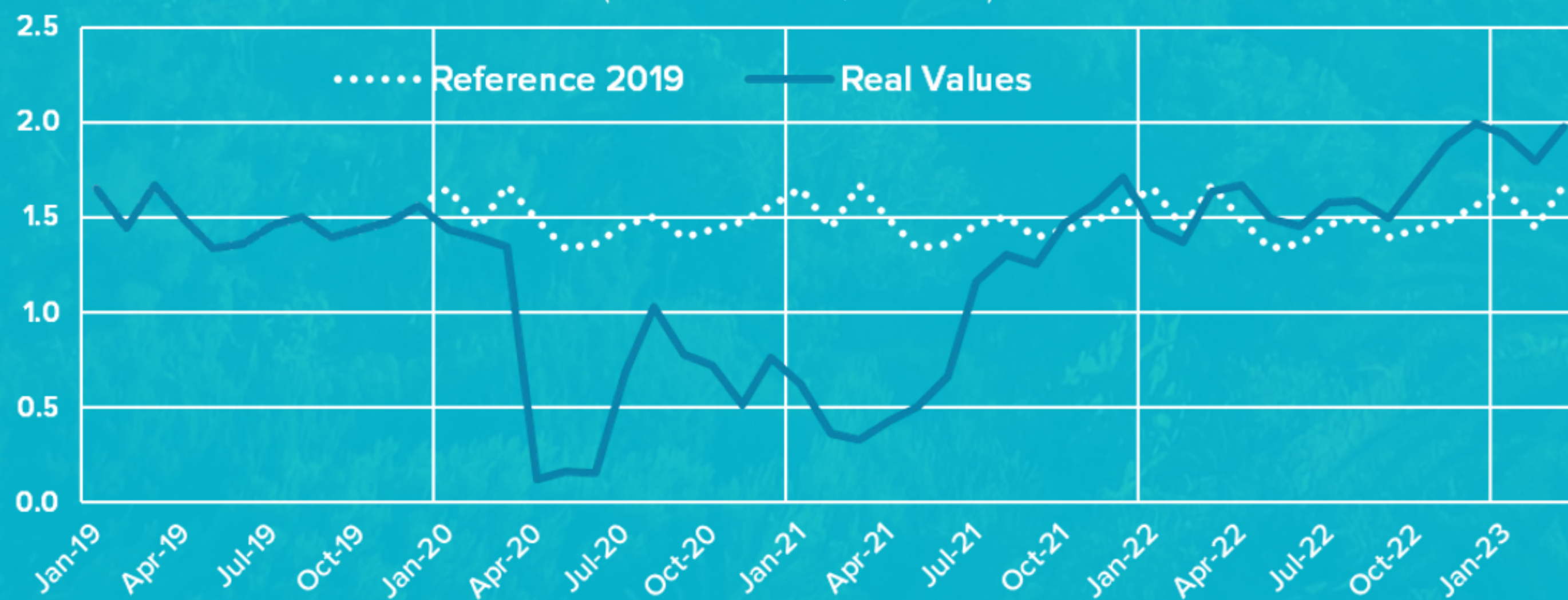
**+10%**

S22 vs S19

**+31%**

W2223 vs W1920

**Air capacity recovery**  
(arrival seats, million)





# The recovery of passengers and tourists is also gathering momentum

but at a slower pace, as the world aviation sector is recording lower load factors than before

[SEE MORE](#)





# Nearly all the airlines are back



 **RYANAIR**

 **Lufthansa**

**norwegian**  


**smartwings**  


**Eurowings**  


**Flyr**

 **sund  
air**

 **AirEuropa**

  
**BRITISH  
AIRWAYS**

 **AIR NOSTRUM**  
LINEAS AEREAS

 **corendon**  
AIRLINES

  
**PLUSULTRA**  
LINEAS AEREAS

 **ATLANTIC AIRWAYS**

**IBERIA**  


**easyJet**

**ICELANDAIR**  


**vueling**

 **Condor**

**Eurowings**  
**discover.**

  
**الخطوط الملكية المغربية**  
**royal air maroc**

**Jet2**

 **transavia**

 **SunExpress**

**VOLOTEA**  


**WIZZ**

**brussels**  
AIRLINES

**TAP** AIRPORTUGAL

**Austrian**  


 **LEVEL**

**Aer Lingus**  


**IBERIA  
EXPRESS**  


**neos**  


**FINNAIR**

 **canaryfly**

**chair**

**enter**<sub>air</sub>

 **LUXAIR**

  
**MAURITANIA AIRLINES**

 **DAT**

 **Blue Air**

 **TUI**

**Canary  
Islands**  
LATITUDE OF LIFE  




And we have been  
graced with  
**the arrival of some  
new ones**

UNITED 

airBaltic

AIRFRANCE 

*PLAY*

 SWISS



# Key Connectivity Figures

53

Airlines

[SEE MORE](#)

146

Destinations

[SEE MORE](#)

403

City pairs

[SEE MORE](#)

731

Scheduled routes

[SEE MORE](#)





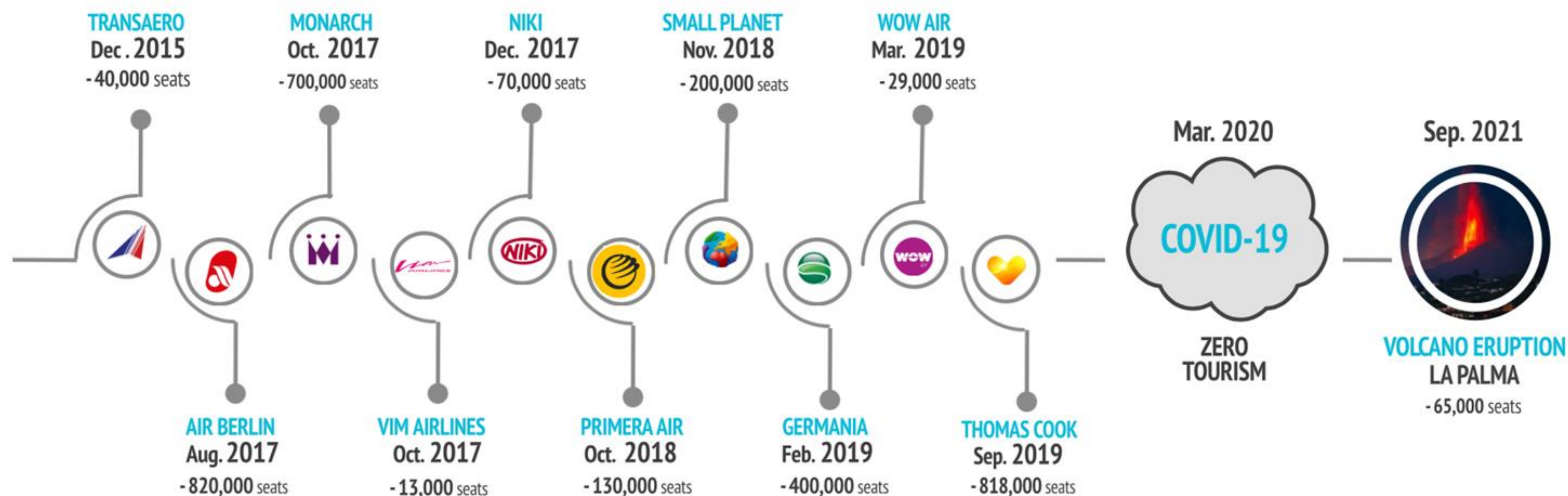
**Extraordinary results  
in an especially  
complex period  
marked by:**

- Strong **competition** from emerging Mediterranean destinations
- The consequences of **Brexit**
- The escalation of **oil prices**
- **The collapse of several airlines** with a large market share in the islands
- **The Covid-19** pandemic
- **The volcano eruption** on the island of La Palma



# TIMELINE

## Airline Bankruptcies and disruptions affecting Canary Islands Air Connectivity



*Former annual arriving seats to Canary Islands of each airline*



# Route Development Strategy:

## INITIATIVES





**Our strategy** is  
based on:

- 1** **Lobbying** the Spanish government and airports (AENA)
- 2** Full **collaboration** and constant dialogue with airlines and tour operators
- 3** **Incentive schemes** to reinforce air connectivity
- 4** Promoting **Canary Islands' tax benefits** for airlines



1

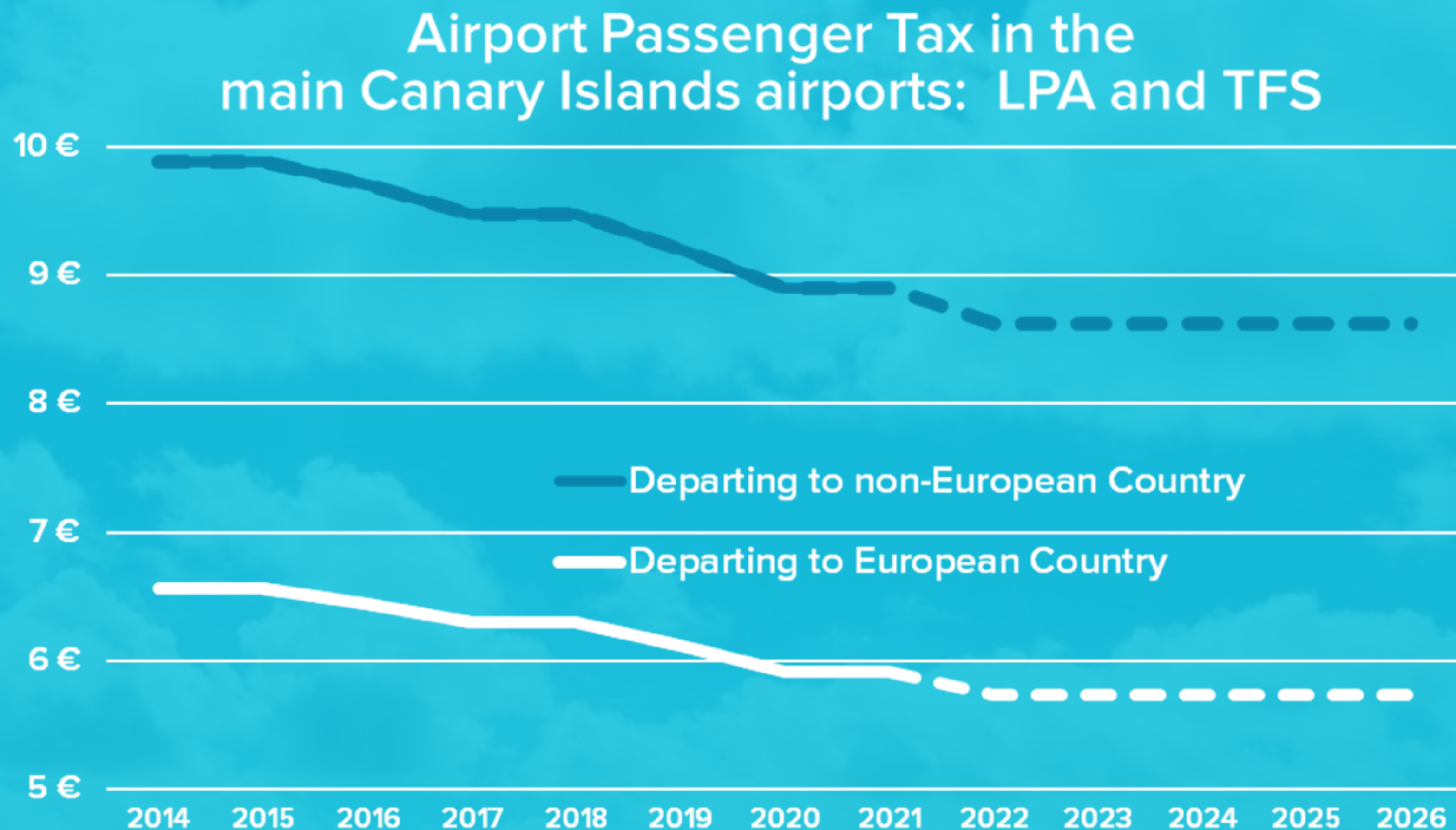
## Lobbying the Spanish government and AENA

### Achievements:

- ✓ Airport tax reductions
- ✓ Total turnaround airport cost in Canary Islands among the most competitive
- ✓ Airport **incentives** to increase connectivity and passengers
- SEE MORE
- ✓ Better **user experience at airports**. High efficiency in handling large flows of passengers

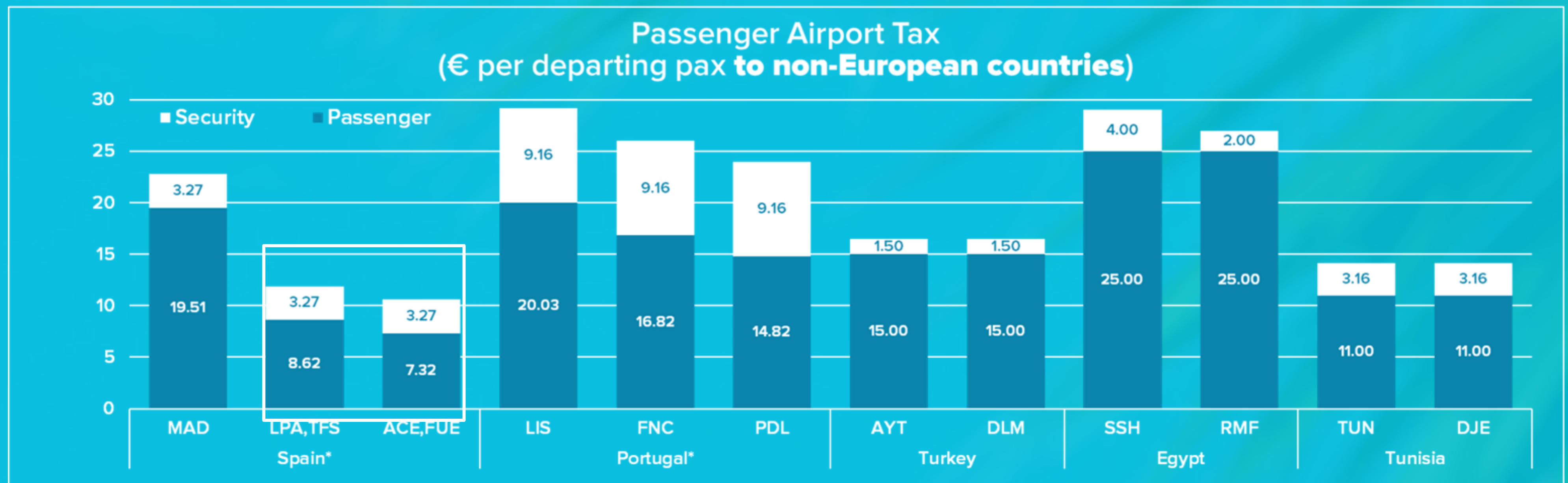
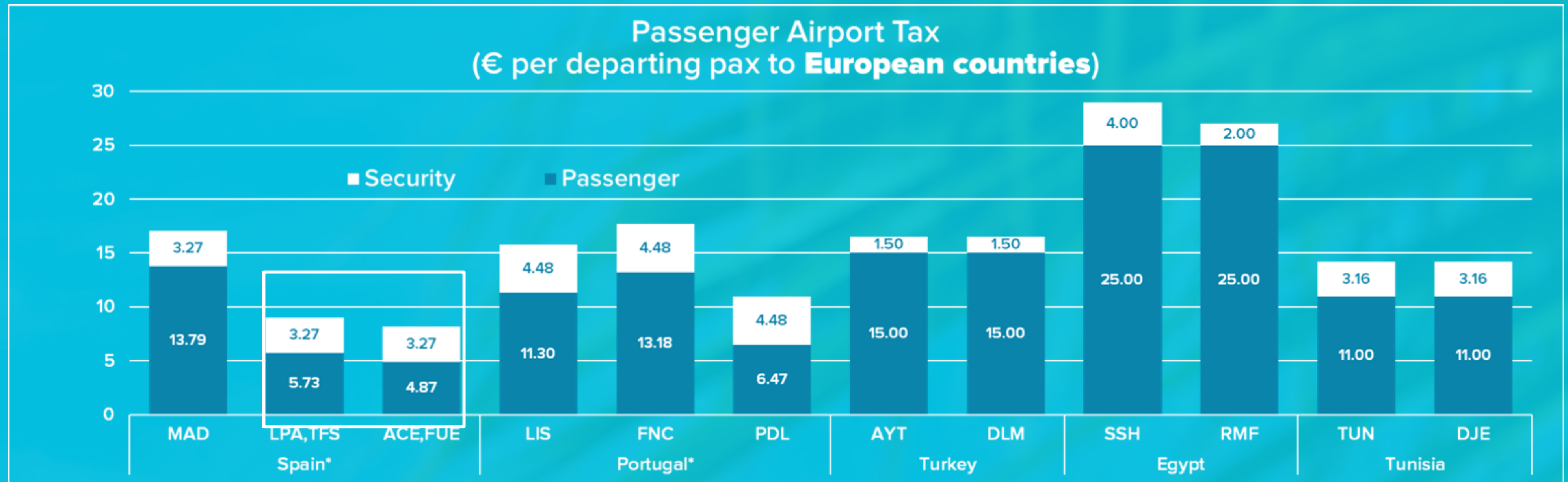


# Continuous reduction of airport taxes until 2021. Frozen up to 2026





# Our airport taxes, lower than those of our competitors





# Overall, the costs of the Canary Islands' airports are more competitive than our main direct rivals

## B737-800

Spain*	MAD	4,756 €
	LPA,TFS	2,878 €
	ACE,FUE	2,548 €
Portugal*	LIS	5,365 €
	FNC	5,379 €
	PDL	4,445 €
Turkey	AYT	3,345 €
	DLM	3,345 €
Egypt	SSH	5,095 €
	RMF	4,774 €
Tunisia	TUN	3,505 €

## A321 XLR

Spain*	MAD	5,652 €
	LPA,TFS	3,453 €
	ACE,FUE	3,055 €
Portugal*	LIS	6,683 €
	FNC	6,407 €
	PDL	5,214 €
Turkey	AYT	3,959 €
	DLM	3,959 €
Egypt	SSH	5,920 €
	RMF	5,546 €
Tunisia	TUN	3,878 €

## A330-300

Spain*	MAD	8,680 €
	LPA,TFS	5,600 €
	ACE,FUE	4,893 €
Portugal*	LIS	9,444 €
	FNC	9,824 €
	PDL	7,571 €
Turkey	AYT	5,951 €
	DLM	5,951 €
Egypt	SSH	8,686 €
	RMF	8,184 €
Tunisia	TUN	6,401 €

*Includes: Passenger & Security, Landing, Aerodrome Traffic Services, Boarding Bridges and Parking*



2

**Full collaboration and constant dialogue with airlines and tour operators**



**Continuous exchange of relevant information**



**Real-time contact during crises**



**Joint co-marketing campaigns**



**Freely available promotional material stored at the Canary Islands' BrandCentre**

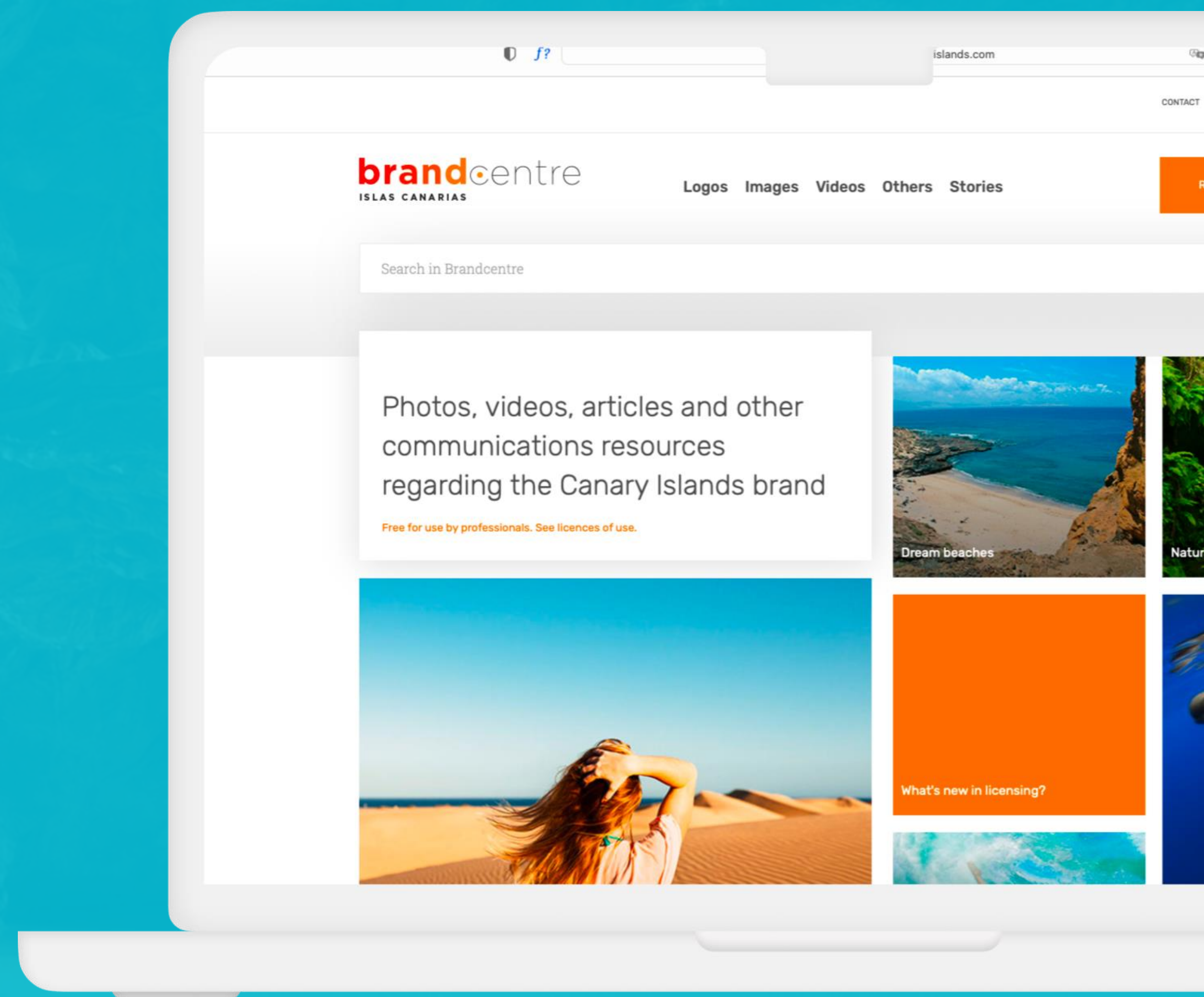


Some evidences of our co-marketing campaigns:



Free access to our  
platform with **high-  
quality promotional  
material**

Photos, audio-visual productions,  
brochures, campaigns...



SEE CANARY ISLANDS **BRANDCENTRE**

Canary  
Islands   
LATITUDE OF LIFE





## Incentive schemes to reinforce air connectivity



**Route development fund (€10 million)** for new routes authorised by the European Commission in 2014

[SEE MORE](#)



**Incentives for air capacity recovery after covid (€4.5 million)**

**ACHIEVED**



**Incentives for air capacity recovery in La Palma** after the volcano eruption (€2.6 million)

**IN PROGRESS**



**SWEDEN:**  
Stockholm Arlanda - La Palma  
Gothenburg - La Palma

**DENMARK:**  
Copenhague - La Palma  
Billund - La Palma

**FRANCE:**  
Lyon - Fuerteventura  
Lyon - Gran Canaria  
Marseille - Tenerife  
Nice - Tenerife  
Paris Orly - Lanzarote  
Paris - Fuerteventura

**SWITZERLAND:**  
Basel - La Palma

**FINLAND:**  
Helsinki - Gran Canaria

**POLAND:**  
Krakow - Gran Canaria  
Katowice - Lanzarote  
Katowice - Lanzarote

**CZECH REPUBLIC:**  
Prague - Fuerteventura

**HUNGARY:**  
Budapest - Lanzarote  
Budapest - Fuerteventura  
Budapest - Gran Canaria  
Budapest - Tenerife South

**ROMANIA:**  
Bucharest - Tenerife South

**ITALY:**  
Bologna - Gran Canaria  
Rome - Lanzarote  
Rome - Gran Canaria

**PORTUGAL:**  
Lisbon - Tenerife

**SWITZERLAND:**  
Basel - La Palma

Canary Islands Route  
Development Fund:

This **incentive scheme**,  
a first in Europe,  
has already led to the  
**creation of**  
**25 new routes**

[SEE MORE](#)



4

## Promoting **Canary Islands' tax benefits** for airlines

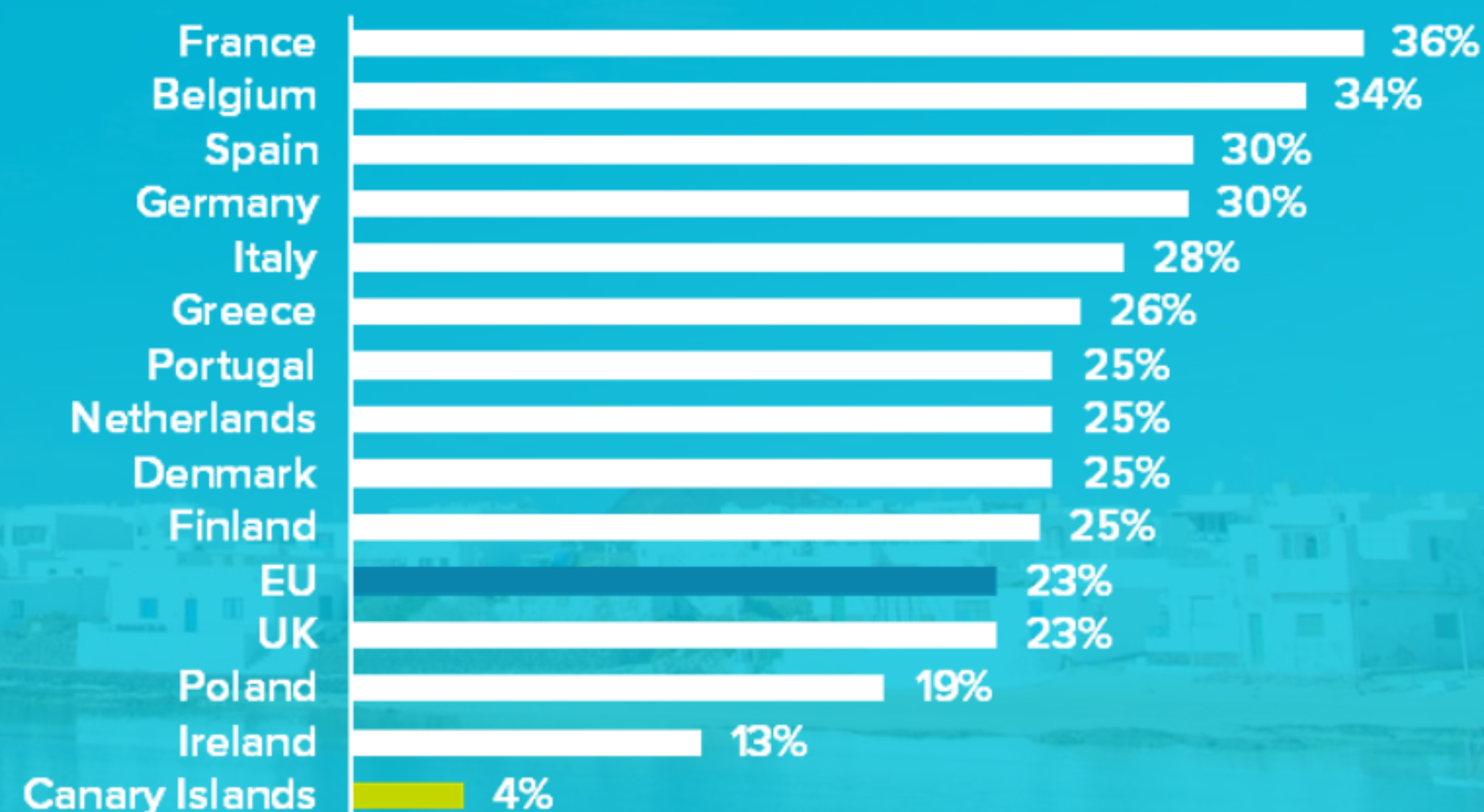


**Best taxation in Europe**  
authorised by the EU

[SEE MORE](#)



**4% corporate tax without withholding tax on profit repatriation** for creating a subsidiary or a branch in Canary Islands





# **Intense, innovative marketing techniques**







**Marketing is an  
essential part of our  
plan to promote the  
connectivity of the  
Canary Islands**





**We run innovative campaigns that invite people to discover the archipelago, strengthening the load factors of the routes**



# Our positioning is based on climate and revitalization

Best climate in the world with sunshine all year round







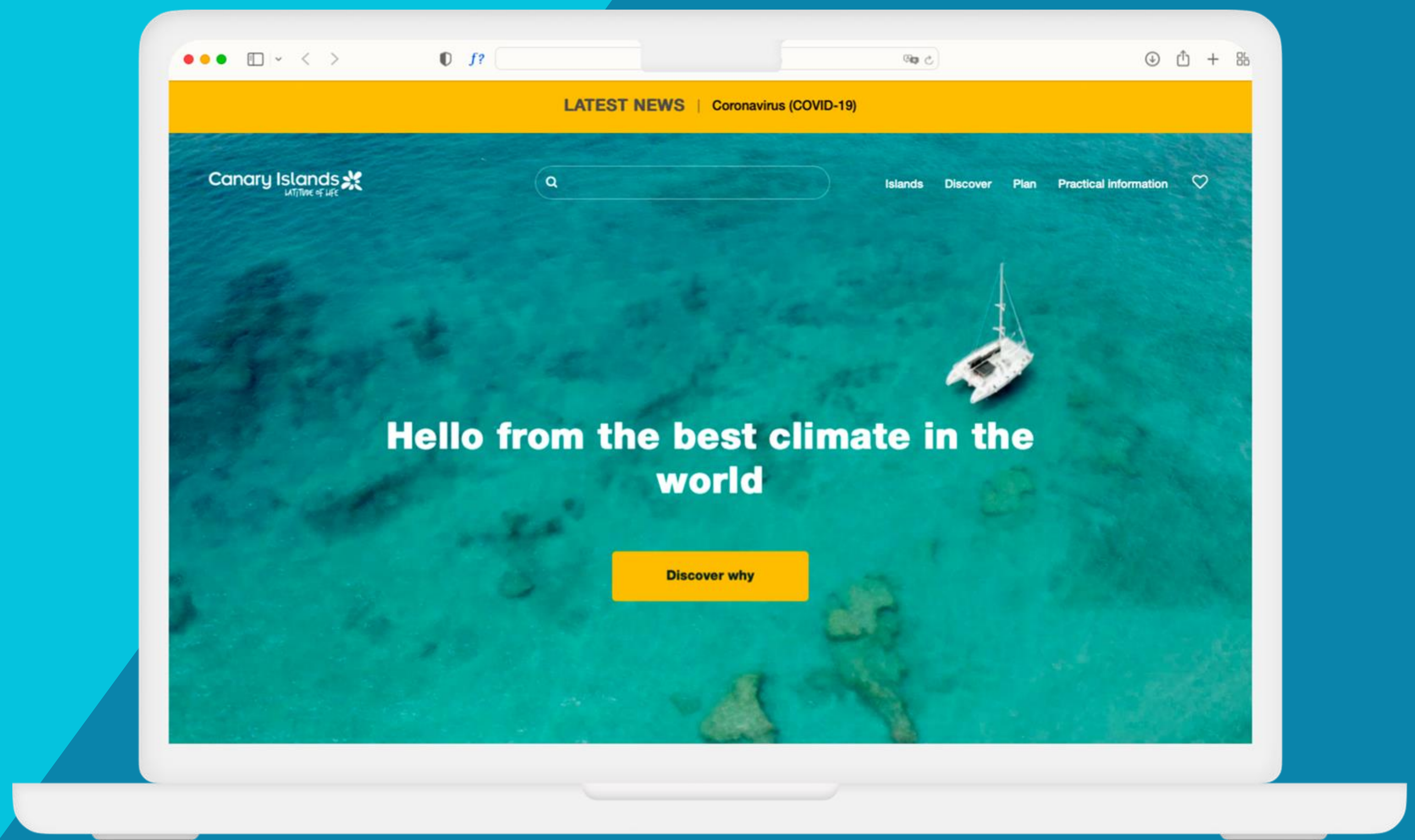
Over recent years we have evolved from  
segmentation towards **personalisation**

We work with new technology capable of **identifying the interests and  
phase of the customer journey of each potential tourist**



We have created a **new website which personalises content** according to the motivations of each user in order to help them to **discover the destination and plan their trip**

VISIT THE **WEBSITE**







Our promotional activity **never stops**.  
It is **‘always-on’**.



# With more than 2,800 personalised Google Ads every day aligned with the interests of every user







Why is such distinctive jewellery created in the Canary Islands?

THERE'S LOVE HERE

afterwork highlights

Turn your phone in

Canary Islands afterwork highlights 10 to 21.00

Turn your phone in 1

Canary Islands outfits..  
✓ To discover a magical spot  
✓ Hike amongst volcanoes

Dive in  
Along more than 1500 km of coastline

So, seriously, is this place?

Daydream  
Walking along La Graciosa's pristine beaches

CANARY ISLANDS RECIPES  
Tomatoes stuffed with lentils

More than  
**4,300**  
posts in 2022

CANARY ISLANDS  
Tomatoes with lentils

why distinctive jewellery created in the Canary Islands

Hello! The Canary Lovers here. How can we help you?

Hey! Watch and escape to the Maspalomas dunes for 10"

THE CANARY ISLANDS PRESENT  
MAJORERO CHEESE  
FROM FUERTEVENTURA

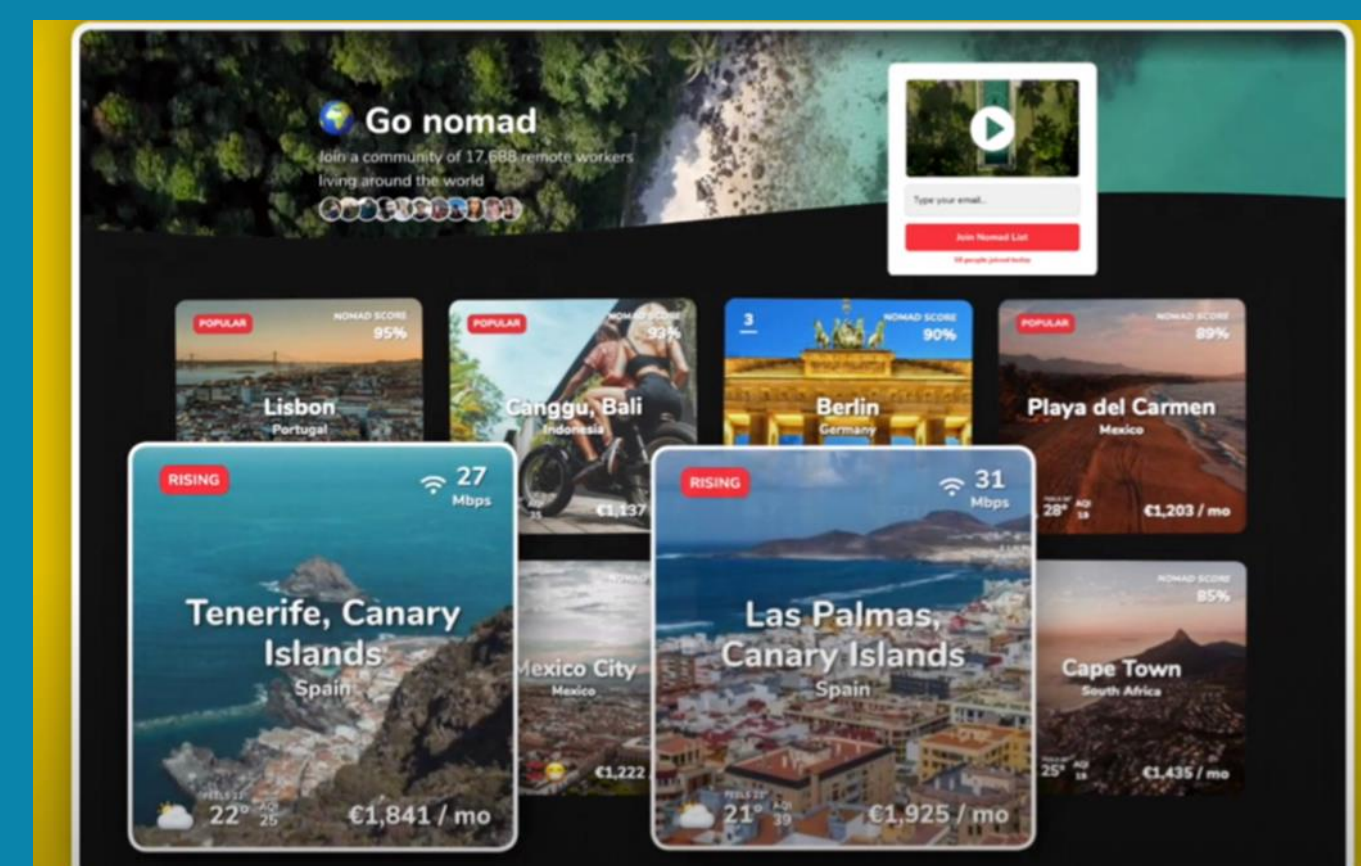
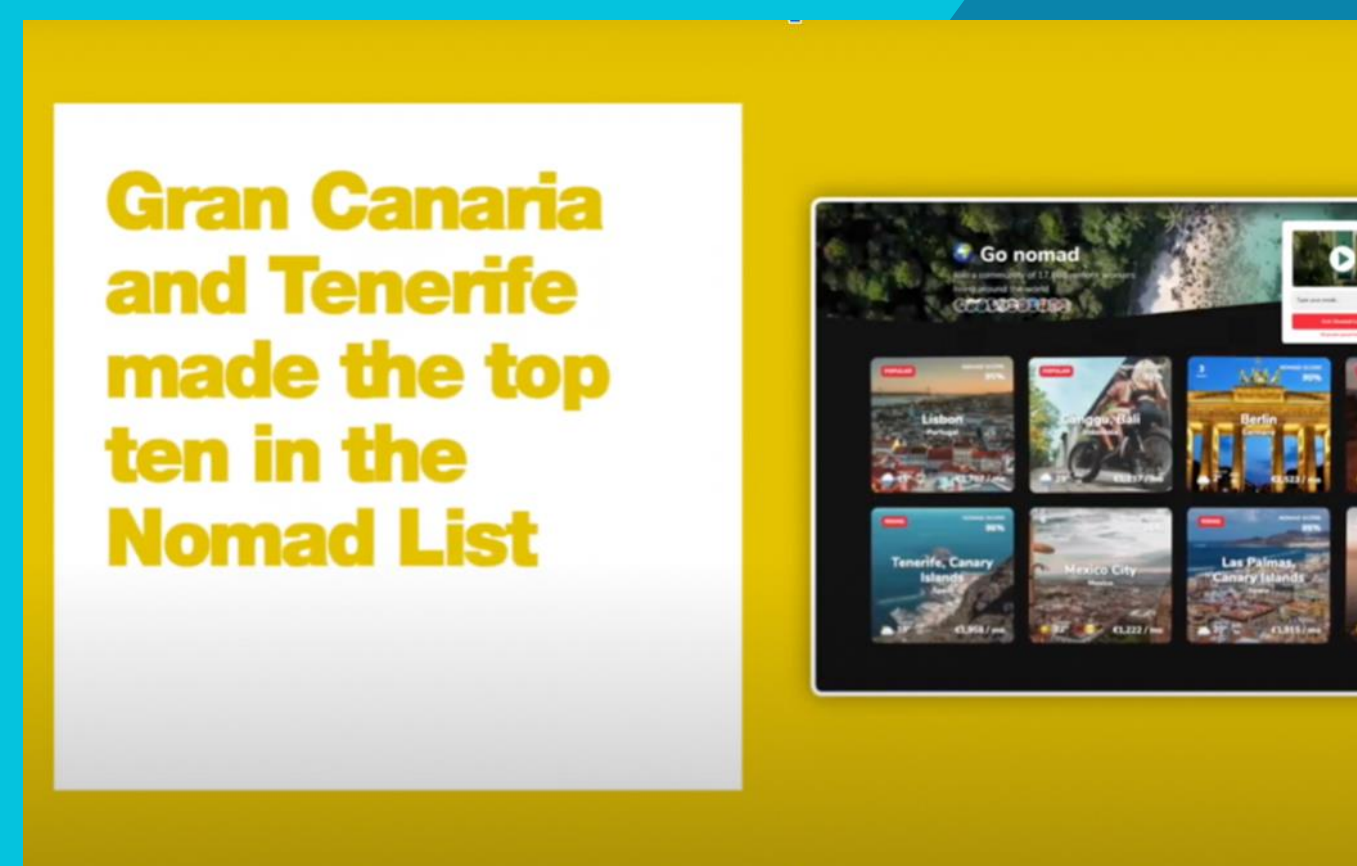
Hello! The Canary Lovers here. How can we help you?

Canary Islands  
LATITUDE OF LIFE



# We also innovate in the search for new contexts and opportunities

We are one of the best places in the world for **remote workers** according to **Nomad list**



SEE MORE



And we feed our digital ecosystem with **special awareness campaigns** like these:

Around the world  
in 8 islands



Data-driven creativity.  
The other winter



Islands of authentic life



Remote Worker Wanted





**Committed to  
sustainability**





# Flights to the Canary Islands are **exempt** from the **European Emissions Trading System**





However, we are **100% committed to a more sustainable tourism activity**

We are active members of the **UNWTO Glasgow Declaration Working Group**



# The Canary Islands are working on:

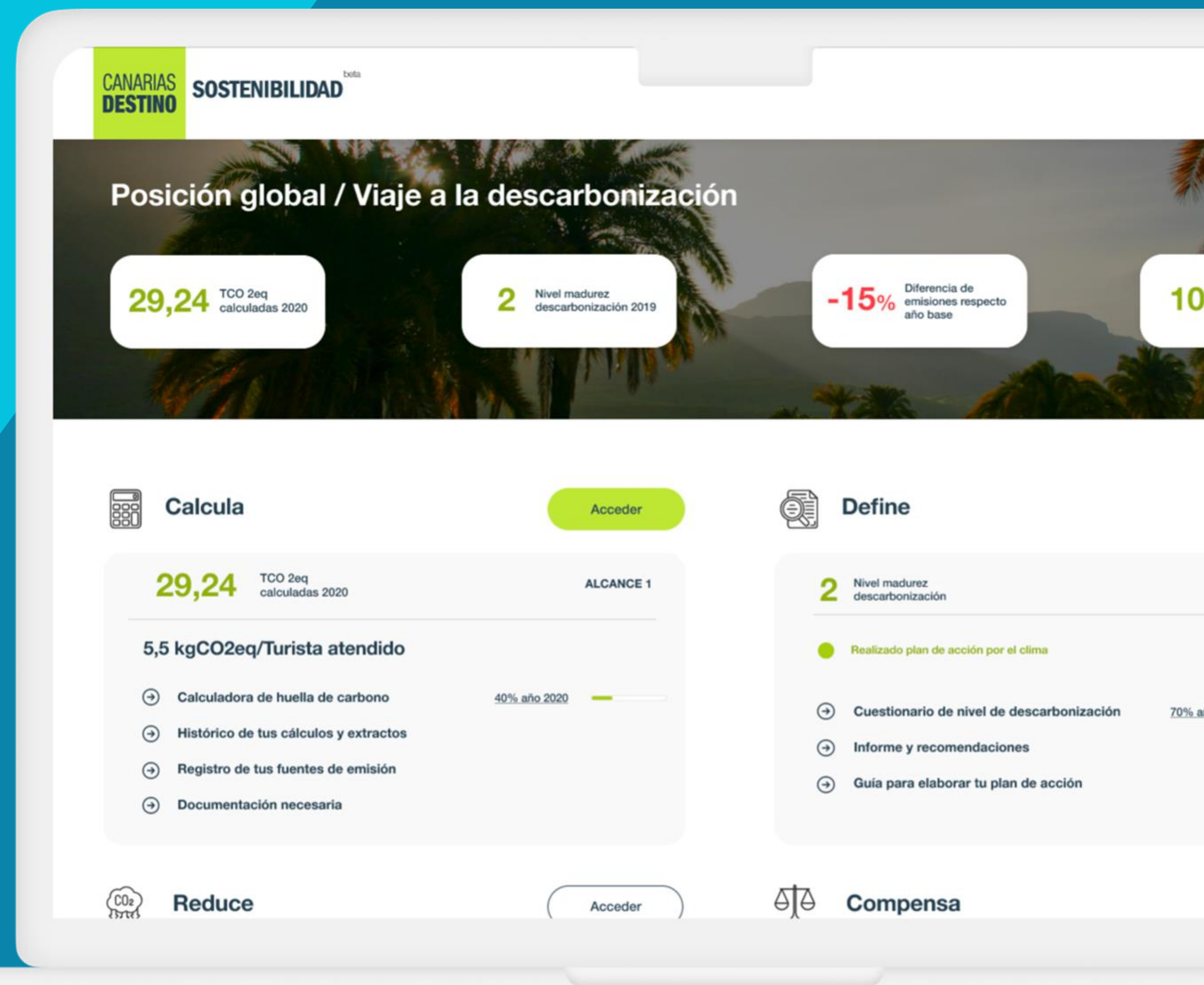
- 1 Reducing CO<sub>2</sub> emissions  
in our destination
- 2 Contributing to the  
decarbonisation of  
aviation



1

# Reducing the CO2 emissions in our destination

We have designed a **calculator** that will help to measure the emissions of the entire tourist value chain in order to evaluate and take measures aimed at **compensating and reducing** our carbon footprint





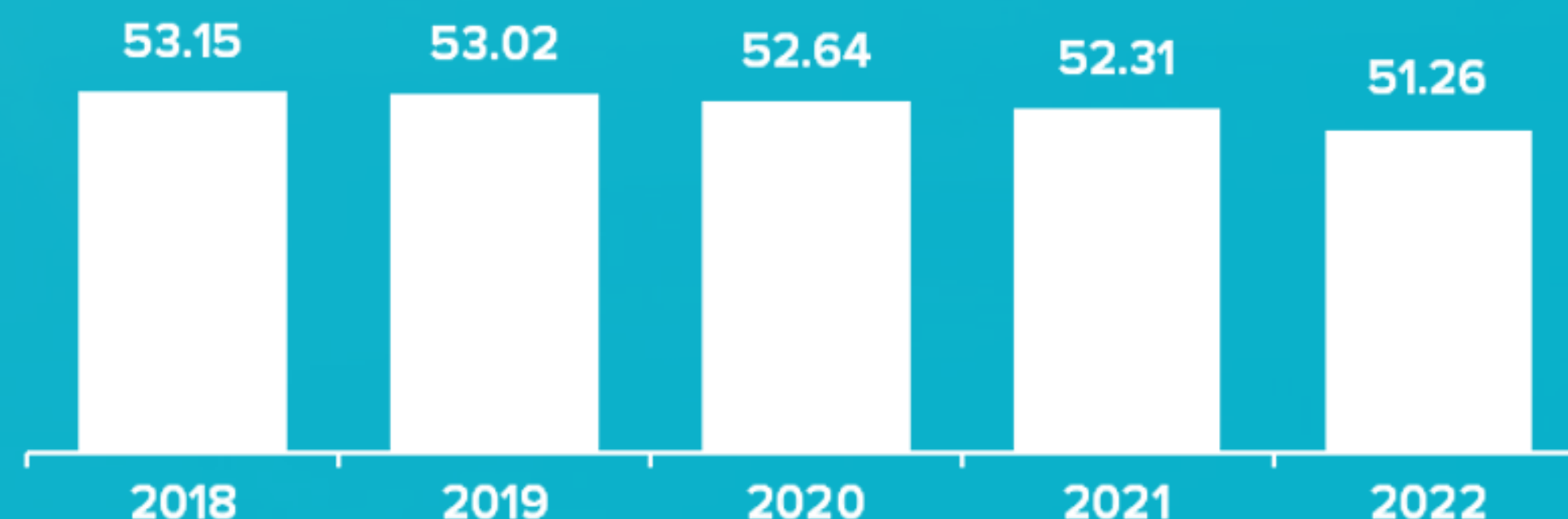
2

## Contributing to the decarbonization of aviation



According to our estimates, **emissions per ASK** in traffic to/from the Canary Islands **have diminished in recent years**, albeit at a slow pace

Flights to/from Canary Islands  
Emissions per ASK  
(CO2 grams)





2

## Contributing to the decarbonisation of aviation

In order to contribute **to accelerate the downward trend**, we are designing new incentives to encourage:

- ✓ The use of **more efficient aircrafts**
- ✓ More **SAF consumption**
- ✓ Greater aircraft **occupancy**

Helping airlines to reduce the costs of the “**journey to decarbonisation**”



# Find out more about the Canary Islands





# Thank you



Canarias  
**avanza**  
con Europa  
Fondo Europeo  
de Desarrollo Regional



**Gobierno  
de Canarias**



**UNIÓN EUROPEA**  
Fondo Europeo de Desarrollo Regional  
"Una manera de hacer Europa"  
Financiado como parte de la respuesta de  
la Unión a la pandemia de COVID-19