

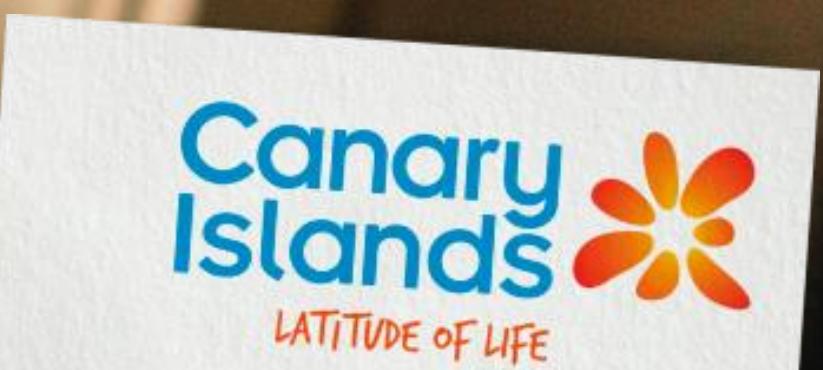
# Improving the connectivity of Canary Islands

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**WORLD ROUTES MARKETING  
AWARDS 2022**

CANARY ISLANDS  
TOURIST BOARD · PROMOTUR

Marketing Awards 2022 SHORTLISTED





- 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**

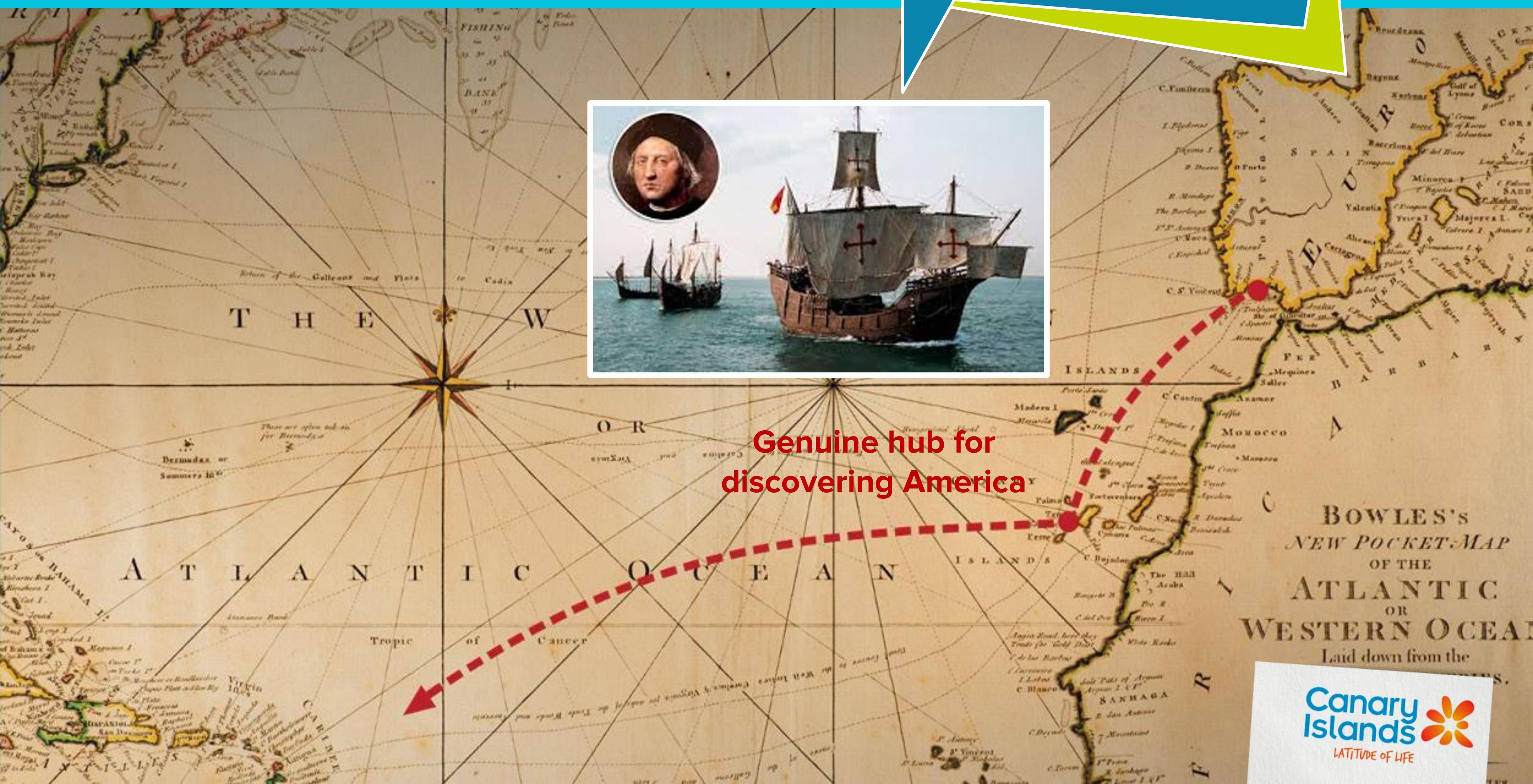
The **economic development** of Canary Islands has always been linked to the **improvement in connectivity**, with the aim of **bringing the islands closer to the world**



# YESTERDAY

Promoting **maritime transport**  
and exploiting our strategic  
position

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



# 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

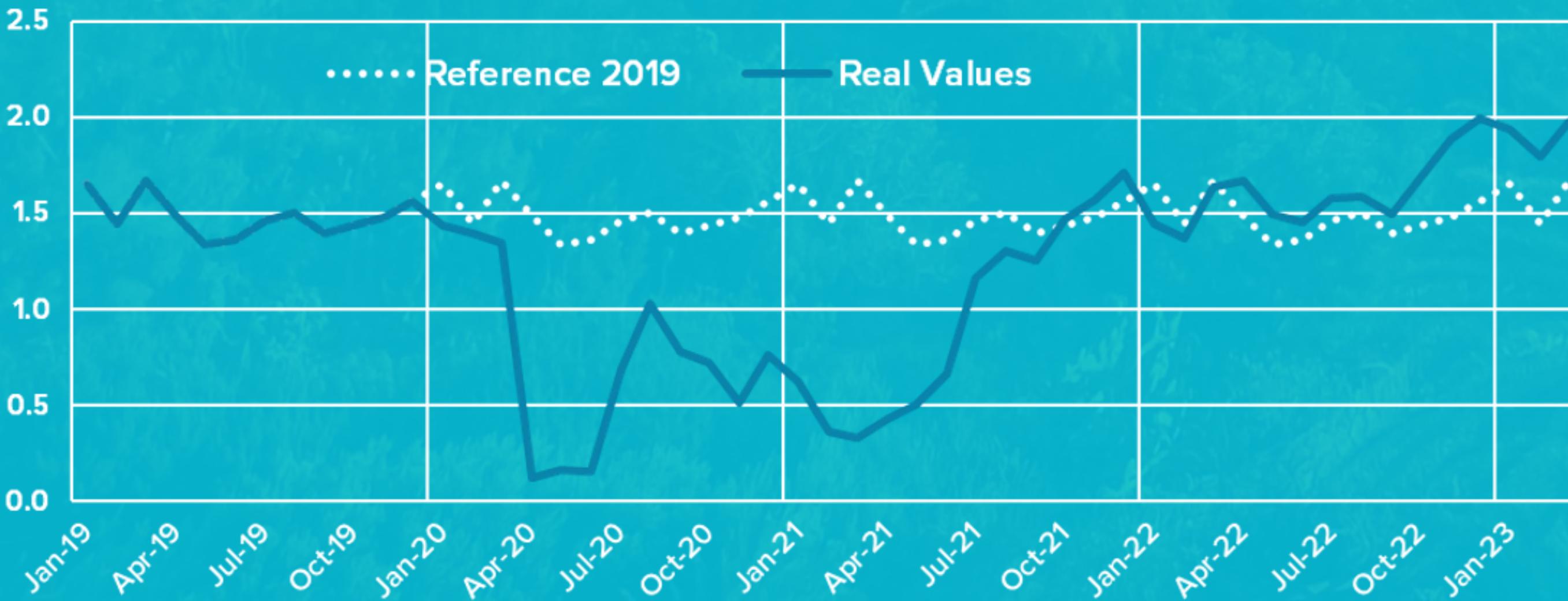


# Route Development Strategy: RESULTS AND EFFECTIVENESS



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

Air capacity recovery  
(arrival seats, million)



+7%

W2122 vs W1920

+10%

S22 vs S19

+31%

W2223 vs W1920

# 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

AirEuropa

IBERIA

Binter

Jet2

Austrian

chair

Lufthansa

BRITISH AIRWAYS

easyJet

transavia

LEVEL

SAS

enterair

norwegian

AIR NOSTRUM  
LINEAS AEREAS

ICELANDAIR

SunExpress

Aer Lingus

LUXAIR

smartwings

corendon  
AIRLINES

vueling

VOLOTEA

IBERIA  
EXPRESS

MAURITANIA AIRLINES

Eurowings

PLUSULTRA  
LINEAS AEREAS

Condor

WIZZ

neos

DAT

flyr

ATLANTIC AIRWAYS

Eurowings  
discover.

brussels  
AIRLINES

FINNAIR

Blue Air

sund  
air

royal air maroc

TAP AIR PORTUGAL

canaryfly

TUI

Canary Islands  
LATITUDE OF LIFE

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



UNITED 

airBaltic

AIRFRANCE 

PLAY

 SWISS

Canary  
Islands  
LATITUDE OF LIFE 

# Key Connectivity Figures

53

Airlines

146

Destinations

403

City pairs

731

Scheduled routes

[SEE MORE](#)

[SEE MORE](#)

[SEE MORE](#)

[SEE MORE](#)



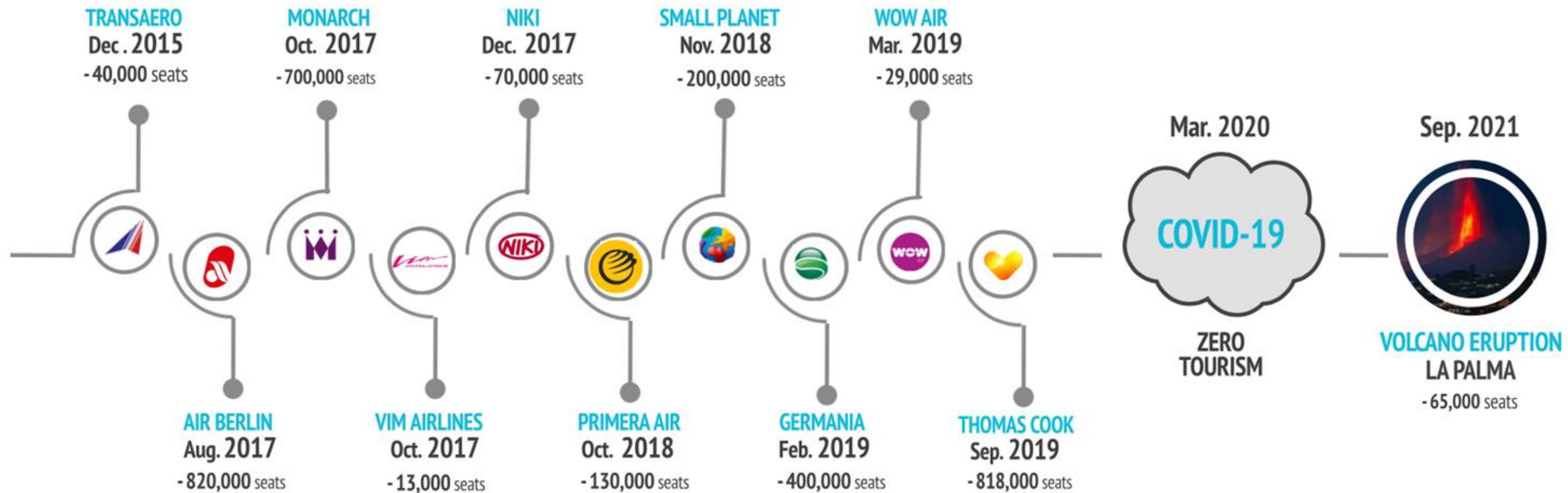
# Extraordinary results in an especially complex period

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

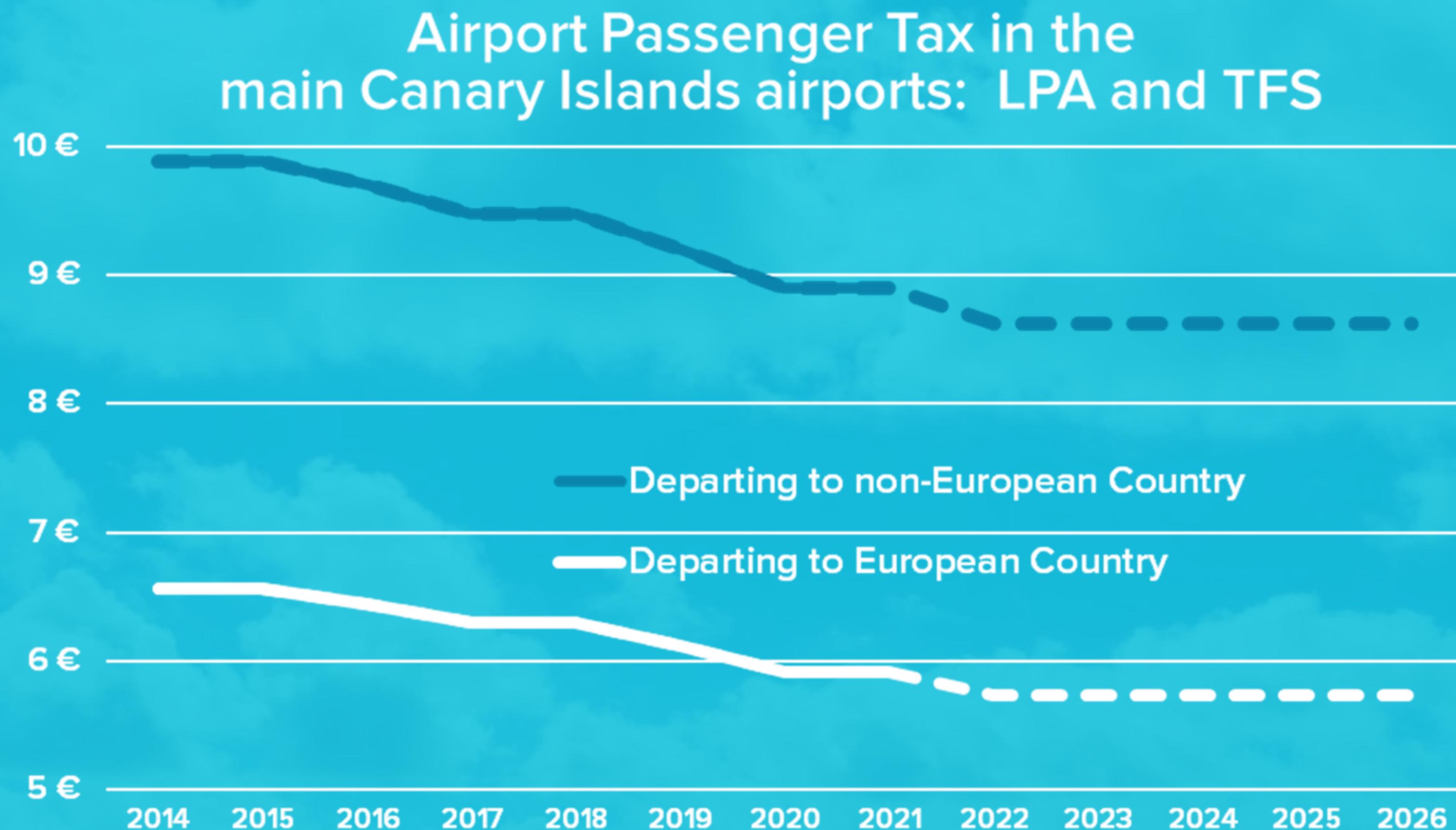
**Lobbying the  
Spanish government  
and AENA**

## Achievements:

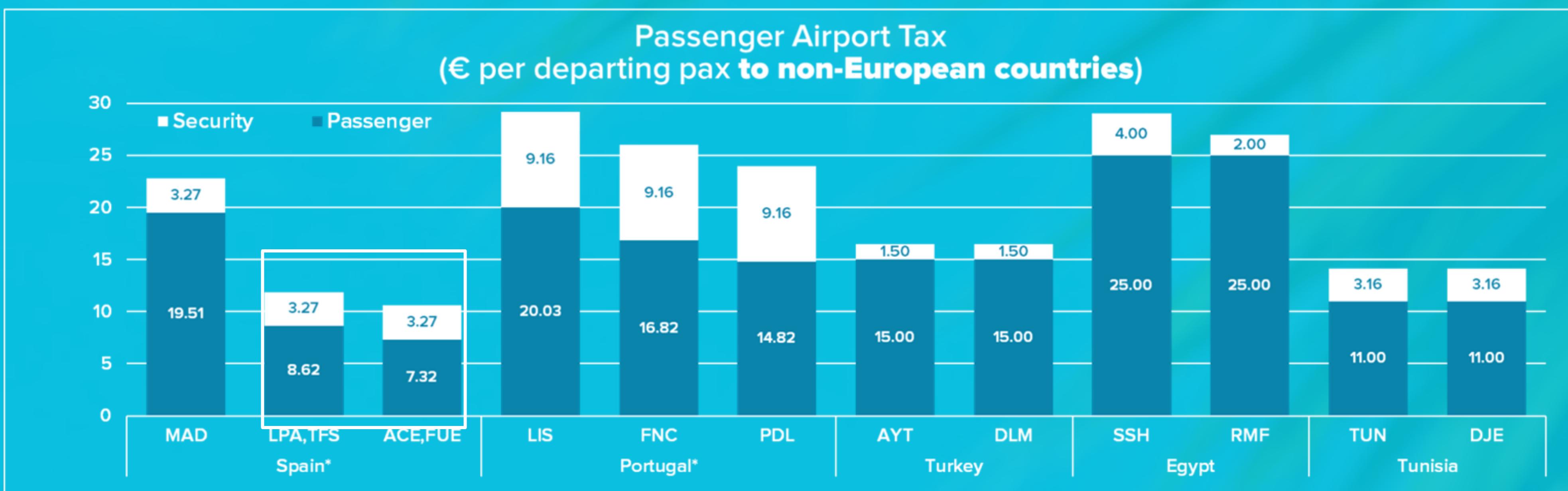
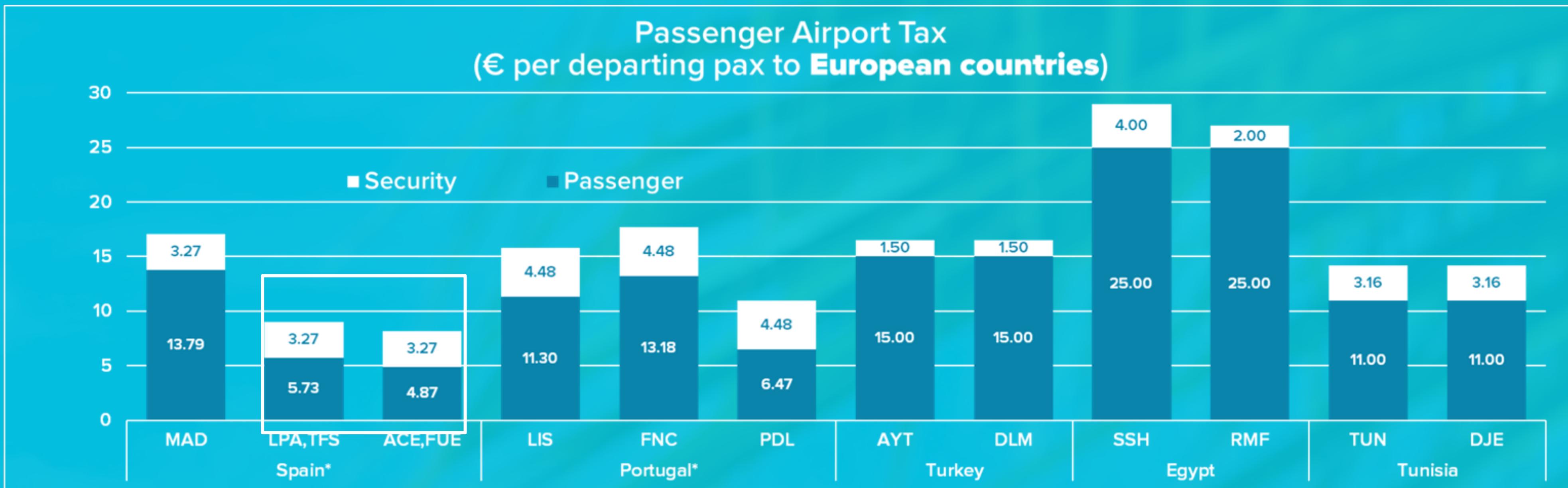
-  **Airport tax reductions**
-  **Total turnaround airport cost** in Canary Islands among the most competitive
-  Airport **incentives** to increase connectivity and passengers
-  Better **user experience at airports**. High efficiency in handling large flows of passengers

[SEE MORE](#)

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

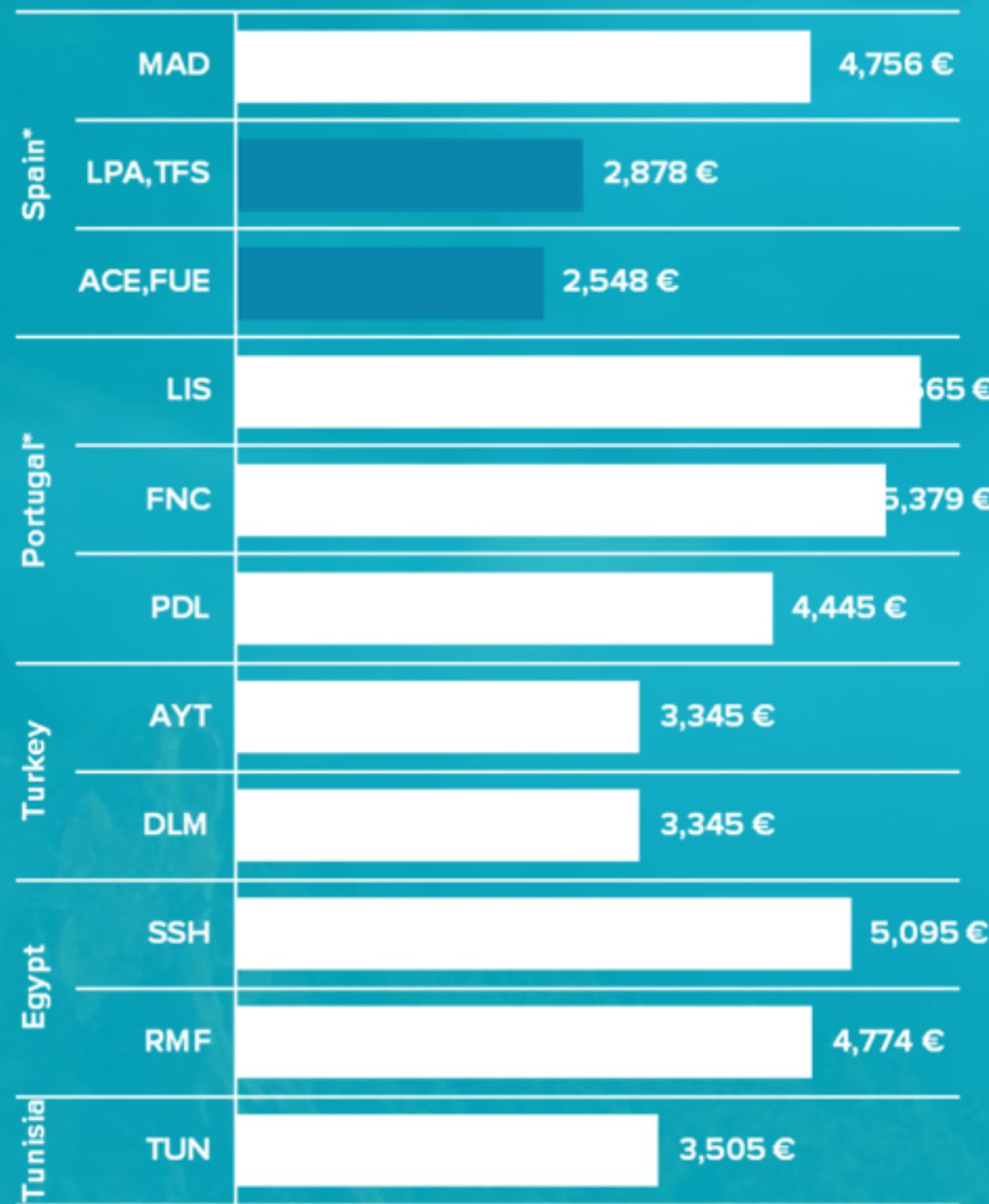


# Our airport taxes, lower than those of our competitors

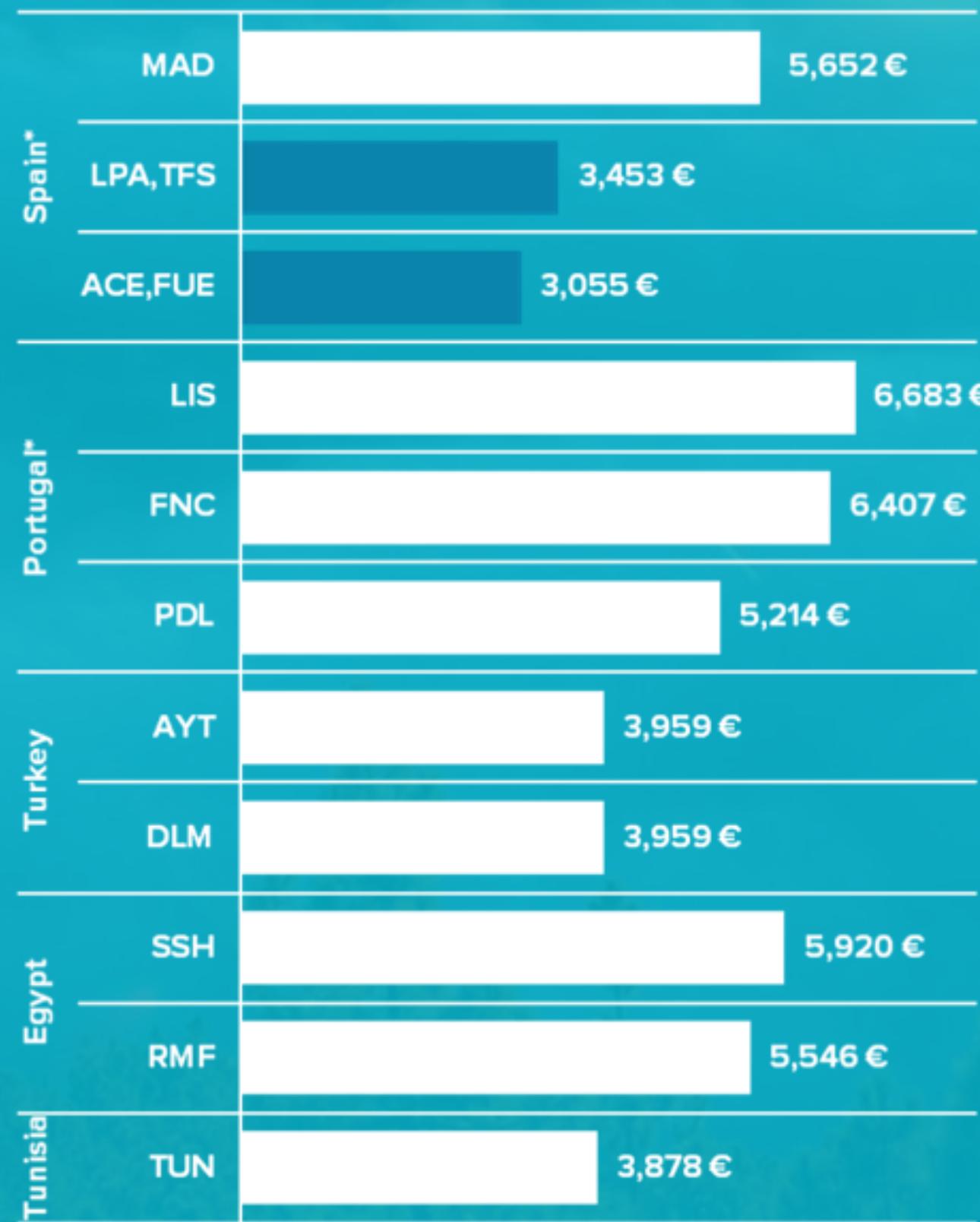


# Overall, the **costs of the Canary Islands' airports** are **more competitive** than our main direct rivals

**B737-800**



**A321XLR**



**A330-300**



*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**

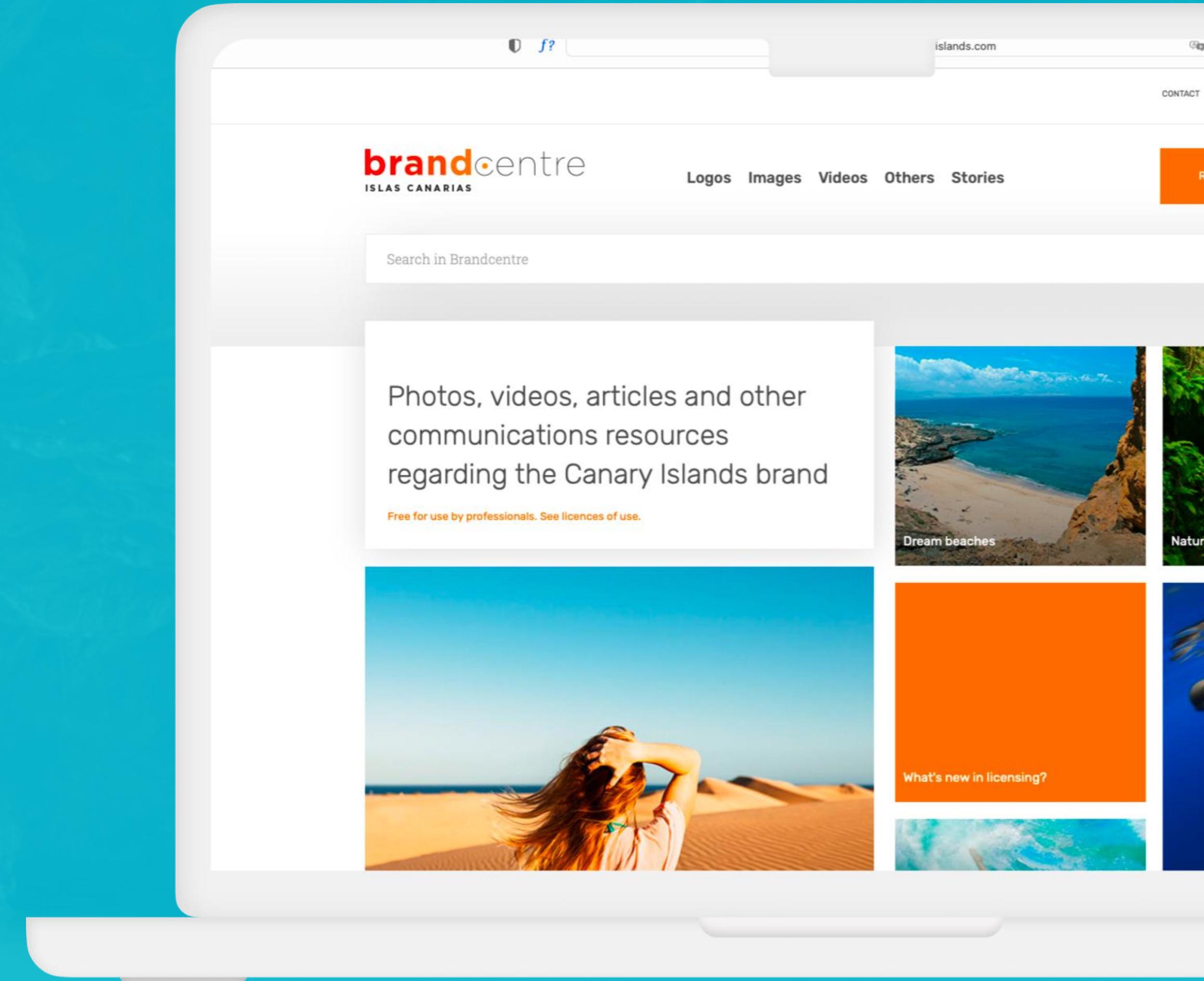


# Some evidences of our co-marketing campaigns:



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

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



SEE CANARY ISLANDS **BRANDCENTRE**



## 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**



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

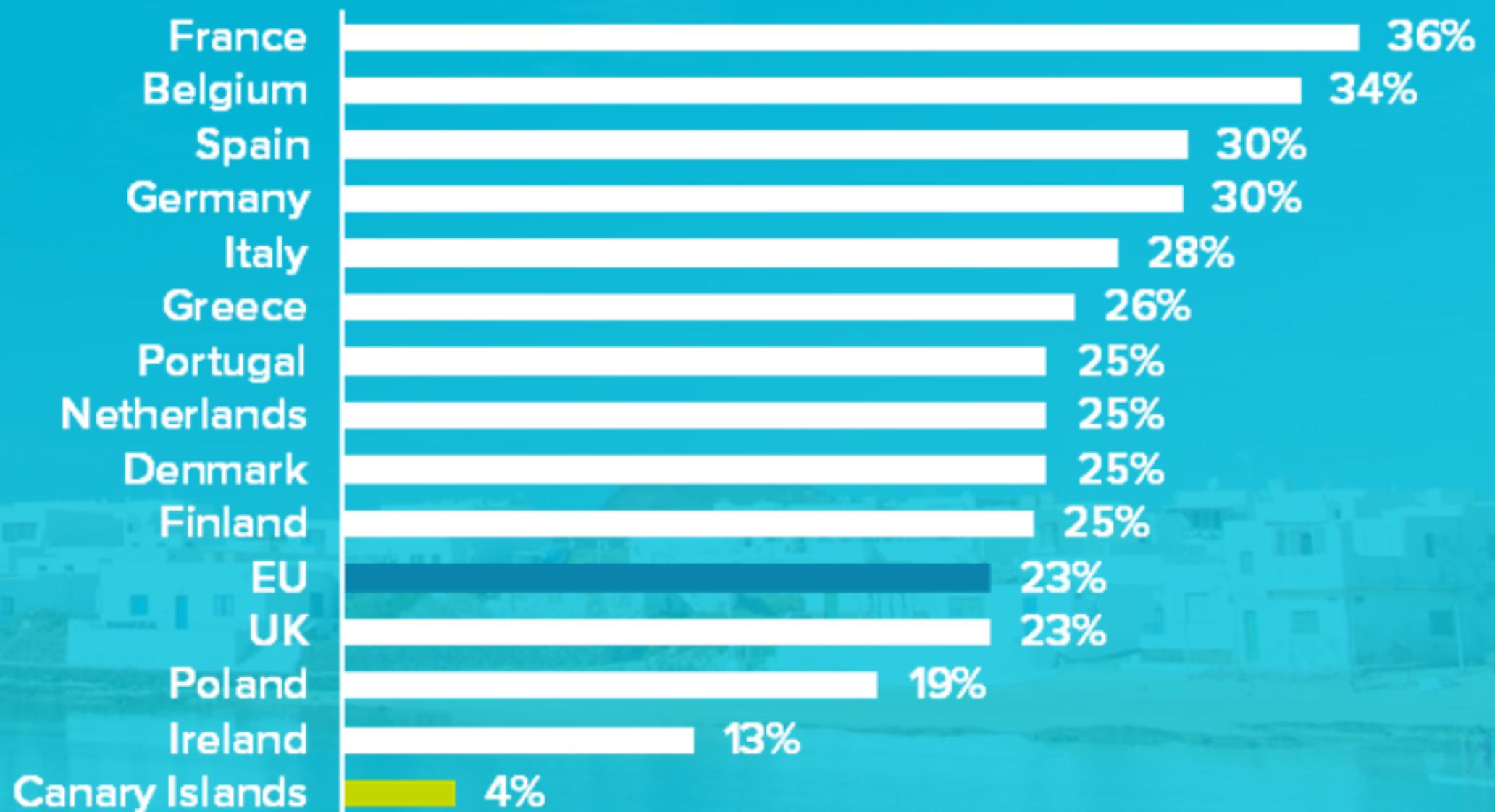


**Best taxation in Europe**  
authorised by the EU

[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



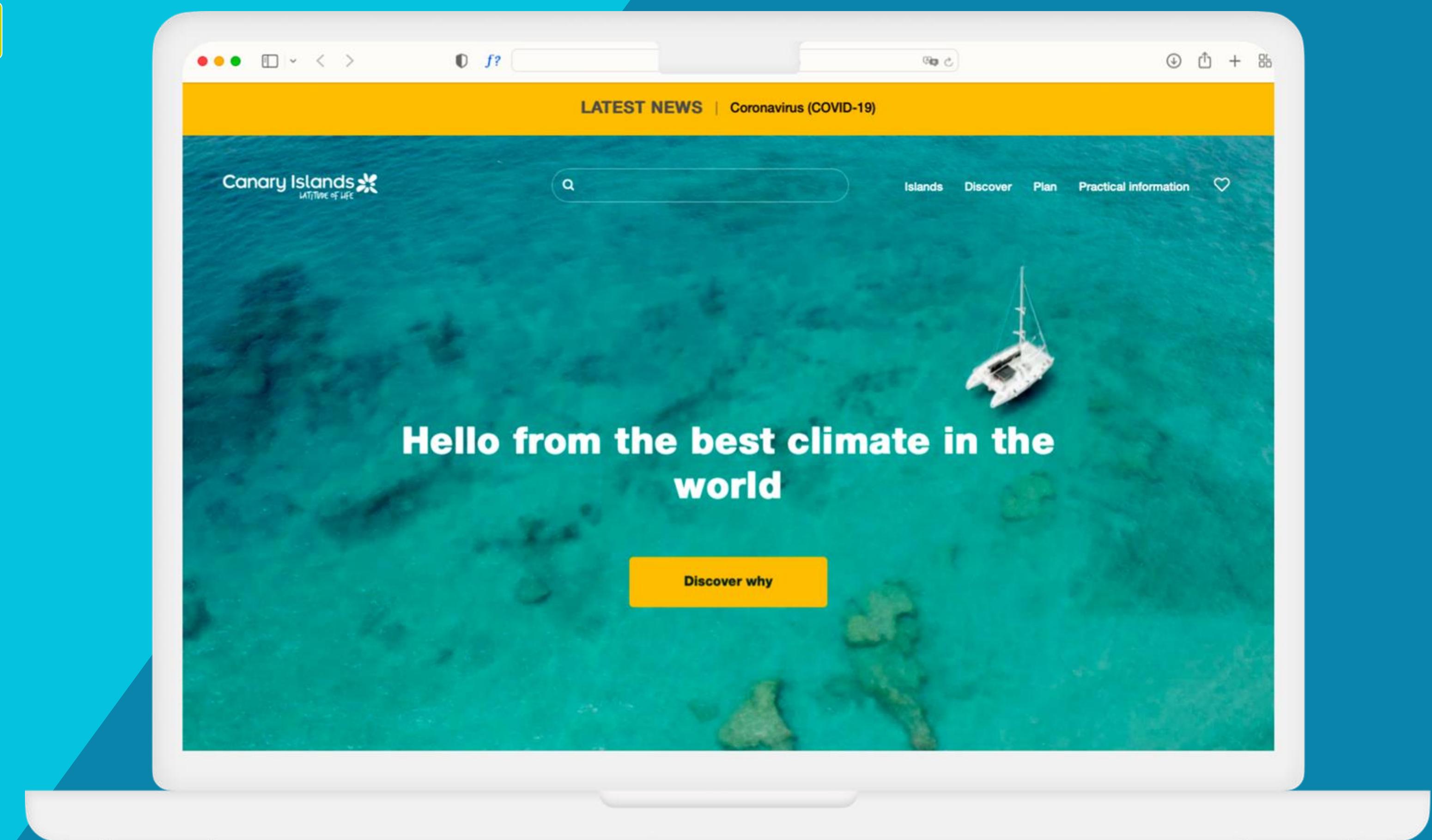


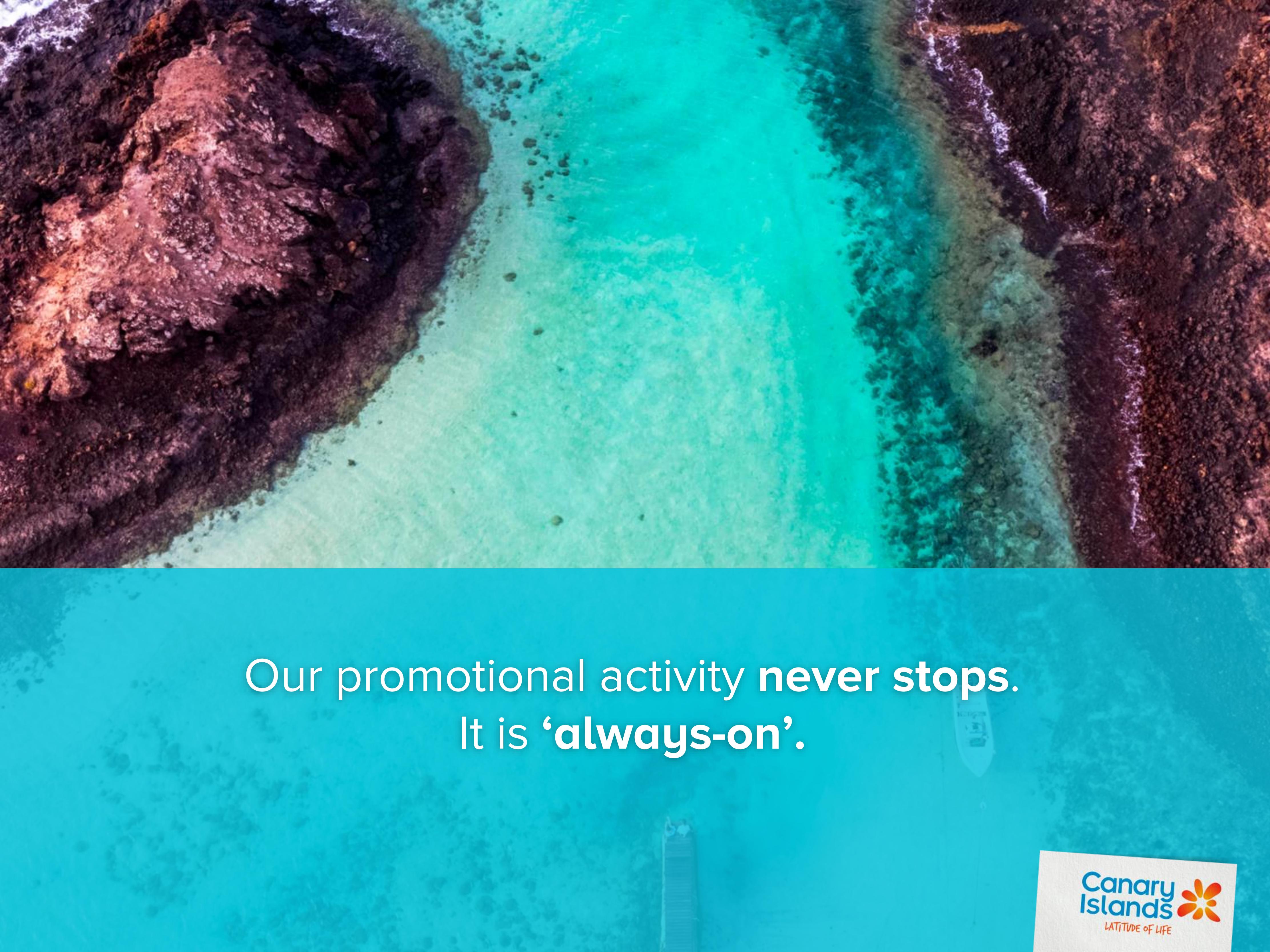
Over recent years we have evolved from segmentation towards **personalisation**

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**

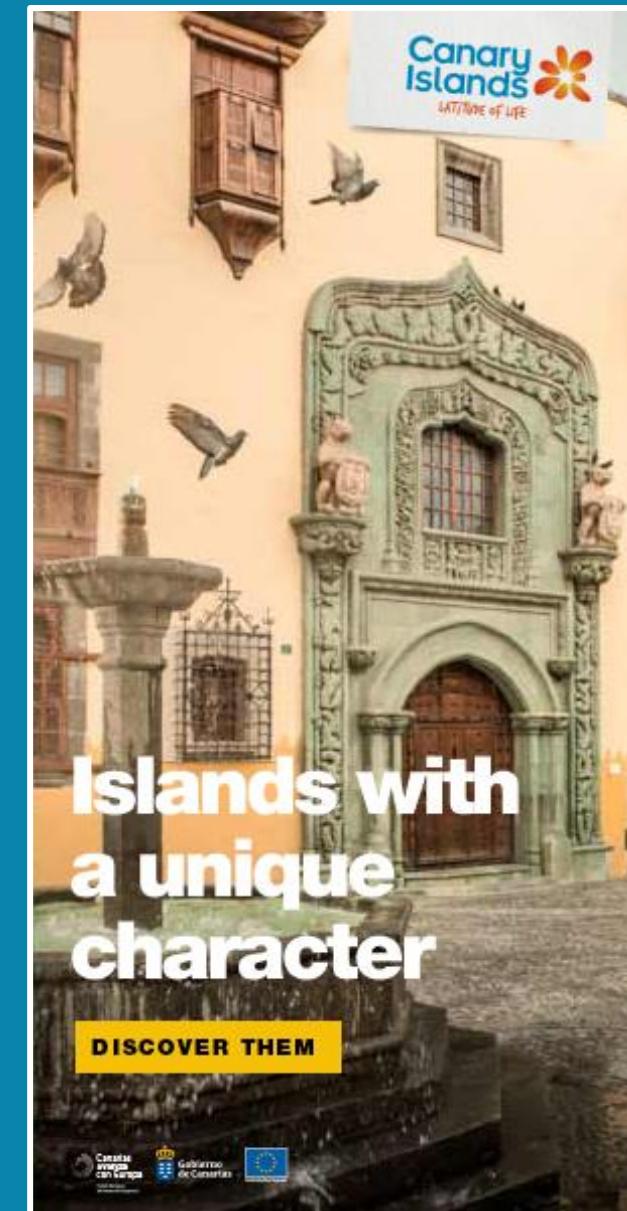
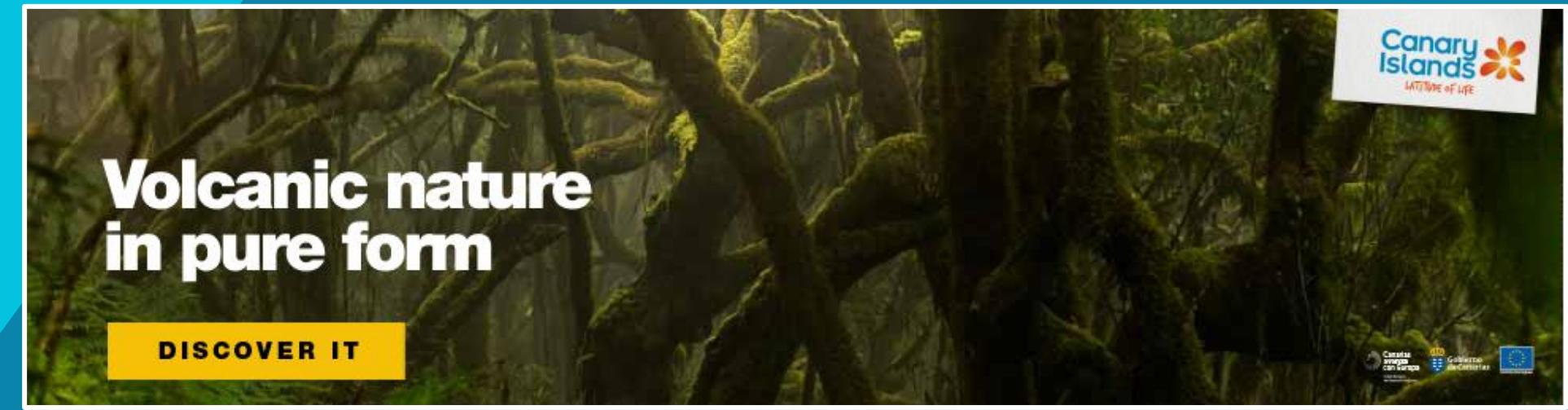
[VISIT THE WEBSITE](#)





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





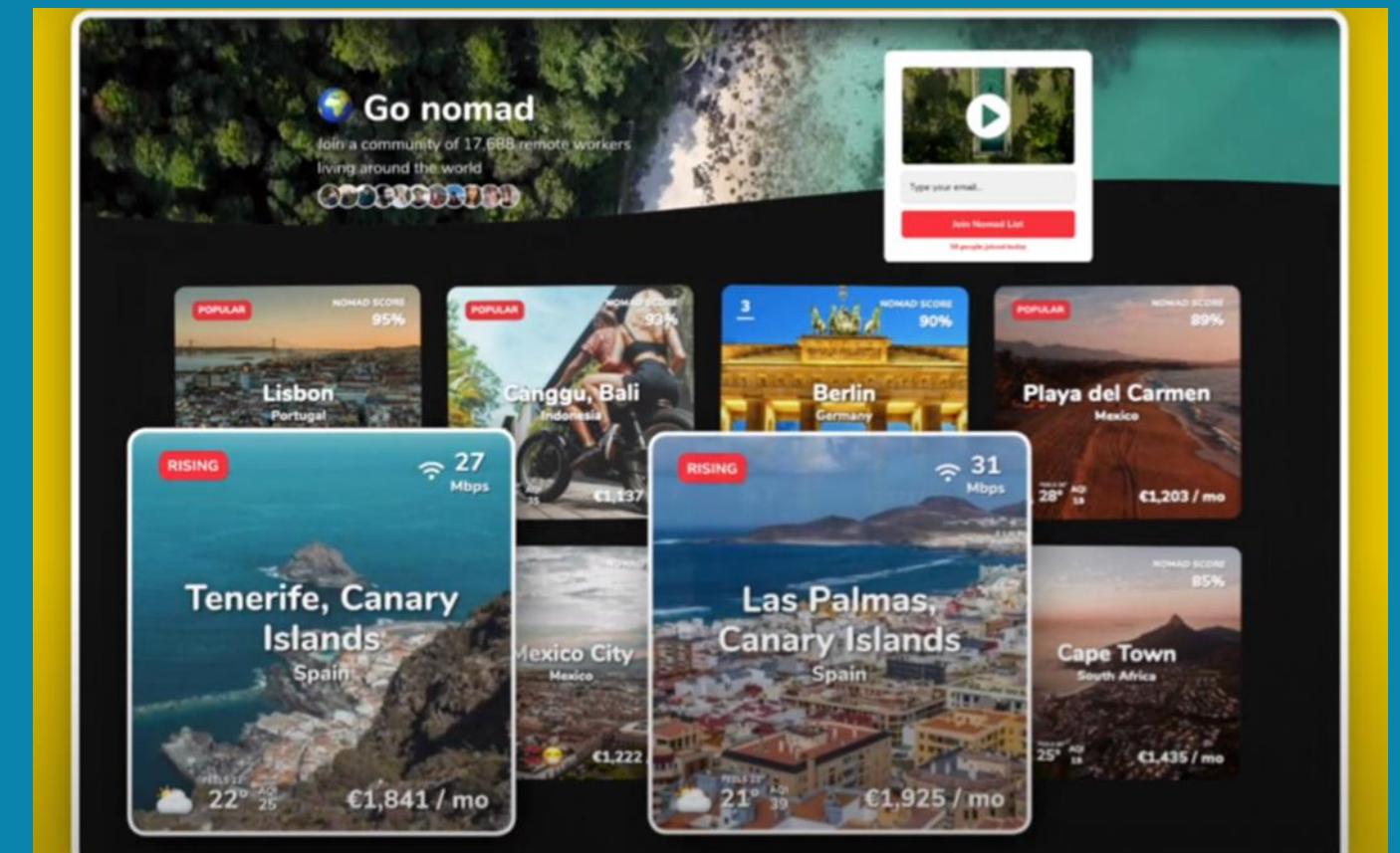
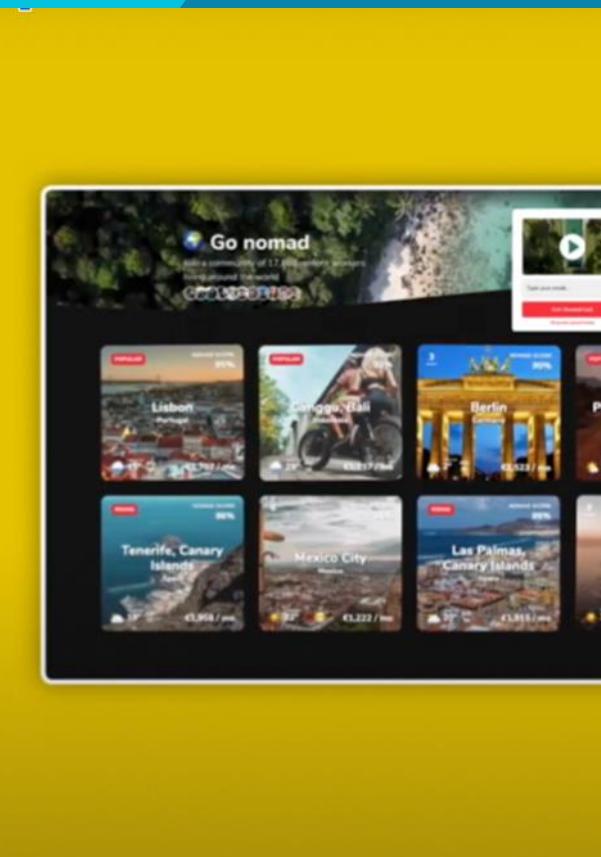
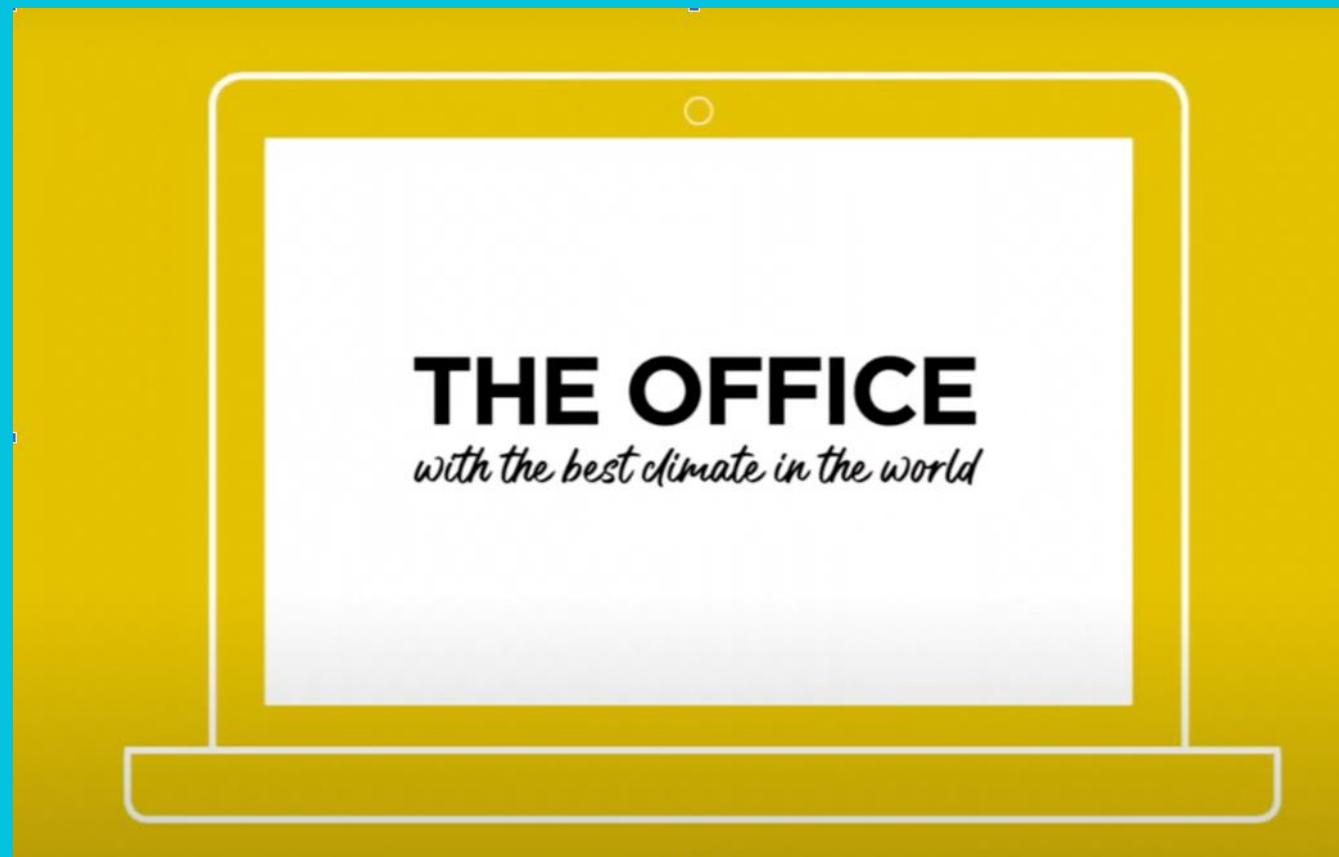
And official profiles on  
social media in 15  
languages

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

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**





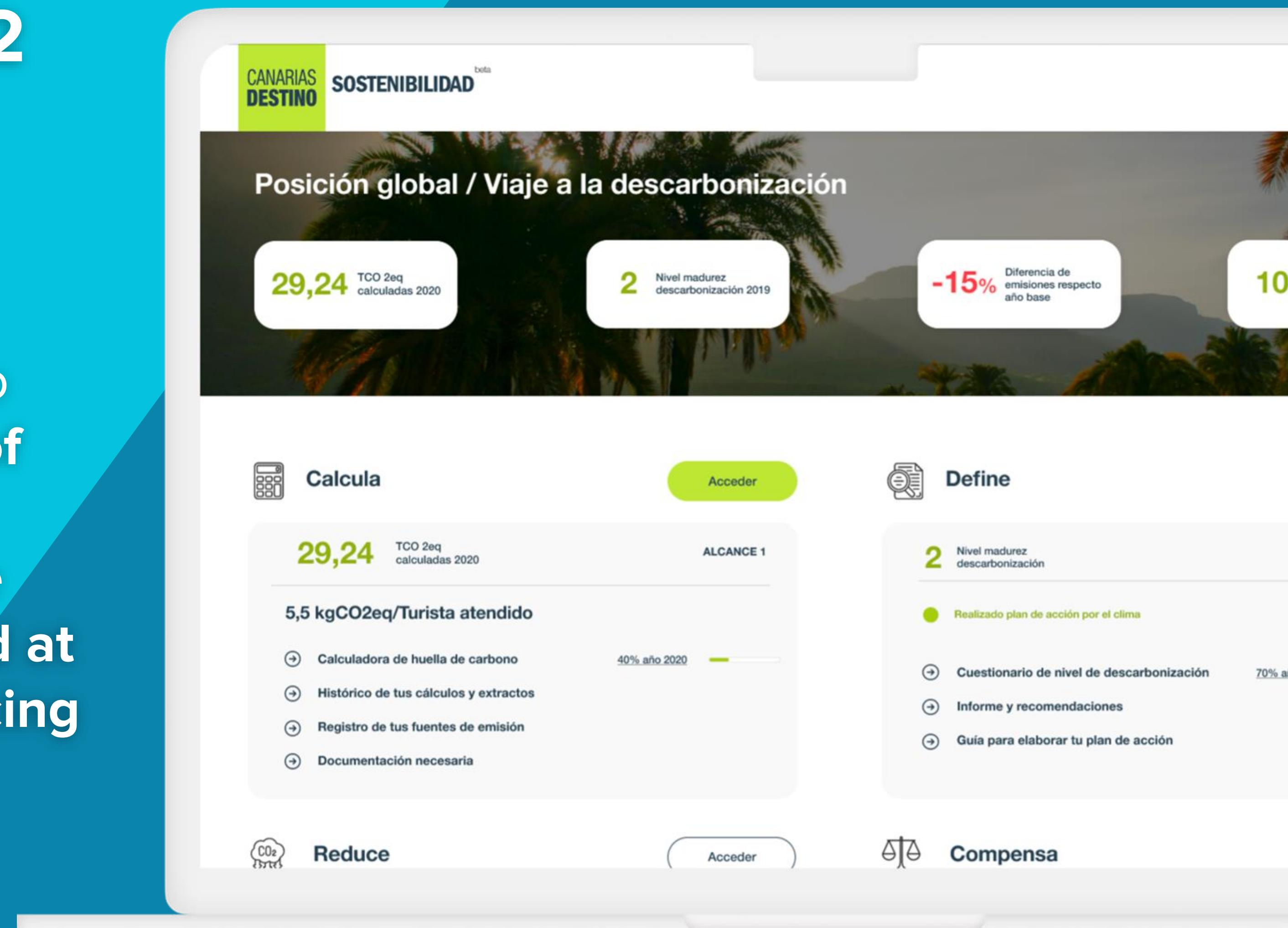
# The Canary Islands are working on:

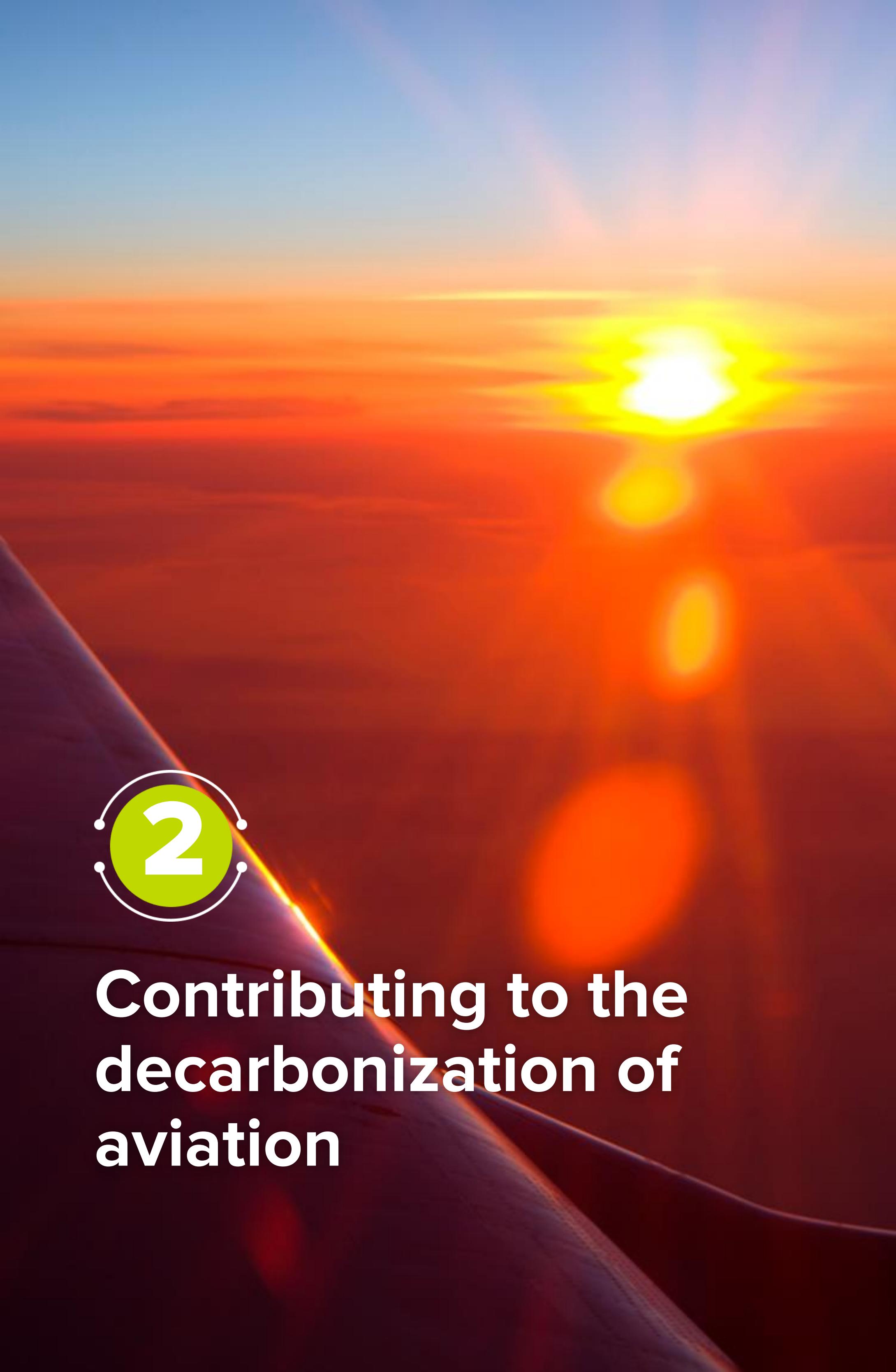
- 1 Reducing CO<sub>2</sub> emissions  
in our destination
- 2 Contributing to the  
decarbonisation of  
aviation



# 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**



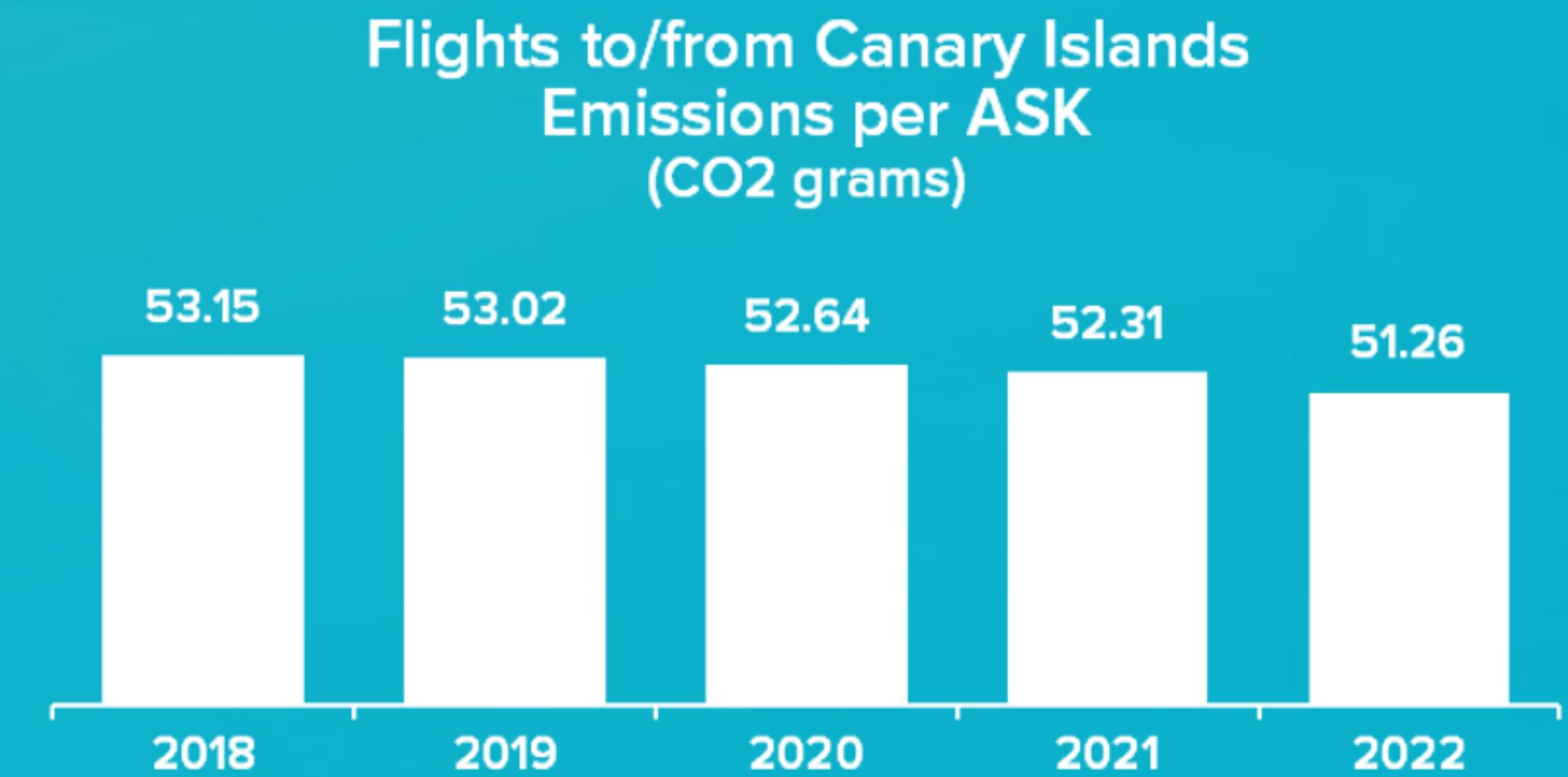


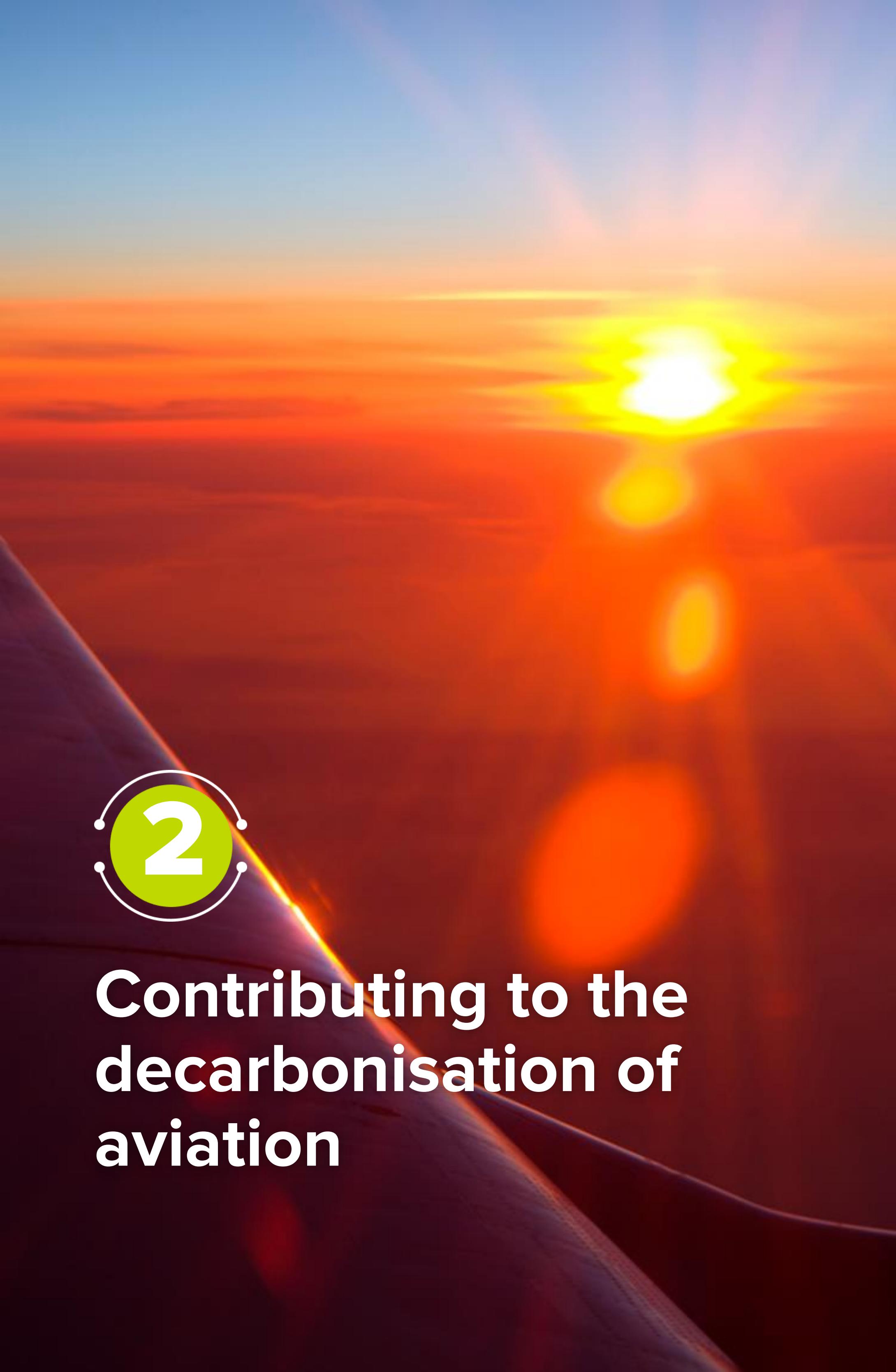
2

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





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