

Tenerife Tourism strategy

2017-2020/2030

The challenge from an integral to
a shared management system



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2017

2017 Declared 'International Year of Sustainable Tourism for development' by the United Nations



Tourism is one of the most important socio-economic sectors; so much so that it moves a volume of business superior to that of oil exports, food products and cars, according to data from the World Tourism Organisation (OMT).

It constitutes one of the main sources of income for both developed and developing countries and generates important economic and employment benefits, whether directly from this sector or from other

sectors related to it. Due to the enormous quantity of people that it mobilises, as well as its effect on the economy and employment, tourism has a considerable impact on sustainable development, while at the same time offering important opportunities for developing countries.

This is the reason that led the United Nations to declare 2017 'International Year of Sustainable Tourism for Development'. This title aspires, on the one hand, to bring awareness to the decision makers and the general public about the importance of the contribution of sustainable tourism on development; and on the other, mobilise at the same time all interested groups so that they can work together in order to make tourism an authentic cause of positive change.

With this in mind, on 25th September, 2015, the General Assembly of the UN adopted the Agenda 2030 for Sustainable Development, a plan of action in favour of people, the planet and prosperity that includes the intention to strengthen universal peace and access to justice as part of a new sustainable development agenda. Specifically, this Agenda sets out 17 Objectives for Sustainable Development (ODS), of an integrated and indivisible character, which cover the economic, social and environmental spheres. These goals will only be achievable if everyone does their part: governments, the private sector, civil society and the individual person.

The International Year of Sustainable Tourism for Development aspires to mobilise all those concerned in order to bring about a change in policies, in business practices and in consumer behaviour that will promote and contribute to a more sustainable tourist sector. In this context, special emphasis has been placed on tourism's role in the following five key areas which, together with the correct policies, will help to make this sector an agent for positive change:

1. Inclusive and sustainable economic growth.
2. Social inclusion, employment and the reduction of poverty.
3. Efficient use of resources, environmental protection and climate change.
4. Cultural values, diversity and patrimony.
5. Mutual understanding, peace and security.

Sustainable Tourism Objectives



Sustainable development establishes a balance between the environmental, economic and socio-cultural dimension of tourist development to guarantee its long-term sustainability. The principles of sustainability are:

1. **To make optimum use of environmental resources:** as a fundamental element of tourist development it is vital to maintain essential ecological processes and help to conserve natural resources, as well as biological diversity.
2. **Respect the socio-cultural authenticity of host communities:** conserve their cultural and architectural assets, their traditional values, and contribute to intercultural understanding and tolerance.
3. **Ensure viable long-term economic activities which give to all those involved:** well-distributed socio-economic benefits that give opportunities for stable employment, the obtaining of income and social services for host communities, as well as contributing to a reduction in poverty.

Moreover, it is necessary that society in general and the agents involved in the tourist development of a destination in particular share joint values toward sustainability. This implies recognition of intrinsic values with regard to nature, cultural identity and the social organization of the territory, beyond seeing it as merely a consumer item.

Within the framework of this International Year, Tenerife is re-examining its own model and proposes, through ten strategic transversal axes, policies and work lines with an integrated focus designed to maximise its contribution to sustainable tourist development.





AXIS

Reflection
on the Tenerife
tourist model



Tenerife is a case of international success in the creation of a tourist system that has allowed the island to position itself as a reference point and place it in an enviable situation to address the challenges that the sector will face in the coming years.

There are many benefits to be gained from this tourism system, among which it is worth mentioning:

- **A great diversity of resources:** headed by its climate and unique richness of nature, which are still inexorable parts of its positioning and tourism differentiation. To these elements can be added, increasing the value of the destination, a local population characterised by its friendliness, the safety as a place for visitors and, moreover, its relative proximity. All this generates a well-known and appreciated image of Tenerife in our main markets, especially the European.
- **A low seasonality of the influx of tourism:** this allows the economic and social structure of the activity to be maintained throughout the year, providing stability in employment and income.
- **One of the world's tourist destinations with the highest loyalty rates:** with 60% of visitors to Tenerife repeating their holidays here and who, year after year, show their satisfaction with the island.
- **A range of basic infrastructures which are transversal to tourist activity:** such as its two international airports, its ports and its roads, all of which facilitate both connections with the outside and the internal mobility of tourists and the local population.

- **A long tourist history that translates into advanced know-how:** although with uneven development in different sectors of activity and with slow incorporation of innovation.

- **A public-private participation in island tourist management:** articulated through Tourism of Tenerife, which in 2017 will have been in operation for 25 years, and which in turn means a long experience that is integrated into the "know-how" mentioned above.

In spite of this, there are many voices that have been warning for more than 20 years of the need for an analysis of the Island Tourist Model that will allow the sector to adapt to a new reality on the island and its environment.

Fast and unpredictable global changes

Among the challenges posed by this new reality it is necessary to emphasize the coexistence with continuous global changes to which the tourism sector is subjected. These arise in an increasingly rapid and unforeseeable way and call for permanent adaptation in order to meet them. Among the most relevant are the following:

- Restructuring of the air transport system, following the emergence of low cost airlines.
- Globalisation of commercial and communication activity, driven by the now not-so-new technologies that have become a new digital ecosystem.
- Disintermediation of the tourist distribution system, until now monopolized by tour operators.
- Proliferation of tourist destinations that compete with Tenerife, attracted by the promises of economic development that tourist activity contributes and which add to the range of possibilities on offer.
- Generational changes that bring new consumers and which bring transformations at increasingly faster rates.

At other times, however, the changes we are witnessing are of an internal nature caused by the ageing process of the destination itself. This supposes the urgent need to reflect on the tourist model and bring about profound changes to the system.

High arrival figures

The tourist fluctuations experienced in Tenerife over the last decade, with strong increases in the arrival figures of tourists which coincide with a number of international conflicts, have led to a certain relaxation of the perception of "urgency" and the need to readjust the tourist system. However, it is also true that, despite this, a certain "**collective conscience**" has been generated with regard to the need for a change to take place.

The significant arrival figures of visitors to the island in recent years has coincided with the renewal of this strategy and this obliges us to awaken this latent awareness and make a necessary reflection on the future of tourist activity in Tenerife and consider the island on which we want to live for the next decade.



New challenges

As already discussed in the previous Tourism Strategy of Tenerife 2012-2015, the change of the island tourist model must be approached from a new vision of the destination's management, one that integrates its territory, activities, goods, infrastructure, facilities, resources, society, economic structure, regulations and common brand image. All this comes together with the consideration that deserves to be given to competitiveness, innovation and the transformation of this sector, which entails being more demanding and courageous in decision making, as well as faster and more effective in performance.

Tourist activity integrates in the destination different sectors and different branches of activity, and this is the reason why it extends well beyond the limits of an economic sector. It is an activity that transcends the entire island economy, involving both its territory and its resources, as well as its society and its economic, political and social agents. The entire island system benefits, but is also affected, by tourism, and therefore tourism management must also be *the responsibility of all of us*.

The design of this new Tourism Strategy for 2017-2020, with a perspective that reaches until 2030, is an opportunity for all those who work for the development of tourism to reflect on relevant aspects, but especially for those who live in Tenerife. Hence the following challenges arise:

- **To take care of the differentiating elements of our island:** in particular, those that by their fragility demand sustainable use or that are part of the island's values. In this line, it is necessary in this new operational period of the Strategy not only to consider the quantitative indicators of the industry, but also to generate more qualitative indicators that allow us to make decisions on aspects as relevant as the integral environmental management of the island or the perceived experience by visitors in areas of great affluence.

- **To reinforce other economic activities:** although tourism has a significant impact on other sectors of the Island, it is necessary to ensure that these are strengthened by the tourist sphere, either through a greater involvement of its part in the same or with the creation of synergies of growth between both economic activities. While this process must be accompanied by a value enhancement of local offer itself, giving momentum to the tourism sector is fundamental.

- **Contribute to the prosperity and development of the local population:** this requires the support of the economy and local production, as well as the hiring of local labour and suppliers. This will in turn allow a greater uniqueness of Tenerife's tourism offer, and the enhancement of employment generating activities that will also contribute to the quality of life of the local population.

- **Continue to work with the shared management of public administrations and the private sector in the generation of new tourist activities and products:** this will result in visitors being able to enjoy new experiences during their stay. This process must be aimed at the formation of companies that demand professional profiles already existing on the island.

- **To favour the transformation of the current educational / training system:** in terms of education, training and job placement, the tourism sector should promote curriculum profiles and educational content adjusted to the business and organizational changes of the area itself in order to meet its end objective of employability and professionalization.

- **Fostering innovative culture and competitive intelligence:** the tourism sector requires innovative organisations and individuals who drive knowledge-based changes to generate social, environmental and economic value and return. Digital training is key to providing tourism with an innovative impulse that contributes to a better knowledge of the tourist who visits the destination through the data and applications service.

- **Advancing a comprehensive system of tourism intelligence in Tenerife:** for tourism management in planning policies and tourism measures based on the transfer to the sector of knowledge and innovations.

- **Express diversity through a multi-product offer:** one of the competitive advantages that Tenerife offers as a tourist destination compared to its competitors is the quantity and quality of activities that can be carried out on the island. Therefore, it is important that the experience perceived by those who visit us translates into a varied multi-product offering which respects the standards of quality of the island's values.

- **Integrated and sustainable planning of the different island areas:** the wealth and proliferation of tourist activities must also have clear planning and a minimum framework to help regulate them, also guaranteeing the promotion of a varied business offer in the service of an increasingly segmented tourism while respecting local values.

- **Find meeting points:** such important issues as the regulation of holiday rentals, tourism land management or the implementation of eco-taxes for some sensitive areas should be urgently addressed.

- **Adopt the decisions and strategic measures that this new model requires:** Public Administrations should integrate qualitative aspects into their policies that are in line with the model desired for the island.

10 pillars

Within this framework of reflection, this new Tenerife Tourism Strategy 2017-2020, and with a vision until 2030, aims to achieve a destination of quality which is competitive and better prepared to satisfy an increasingly experienced tourist market. A creative, innovative and enterprising tourist destination. A more cohesive, equitable and more sustainable destination that contributes to improving the quality of life of its residents through the adaptation of a tourism model supported by ten fundamental pillars:

1. This is a highly competitive sector and subject to a continuous process of change. Therefore, now more than ever, it is essential to have **political and institutional leadership** to make the decisions required firmly and decisively.
2. **Co-operation between the public and private agents** of the different economic sectors that operate in the destination, as well as with the local society, to make decisions and establish strategies in order to achieve the sustainable development of tourism.
3. Tourist use of the natural, social, cultural and environmental heritage of the island will be done with a vision of greater scope than the mere use of this wealth as economic consumer goods, which implies assuming **and preserving at all times the essence of intrinsic identity values**.
4. Improvement of the different environments on the island, always using the **criteria of uniqueness, sustainability and aesthetics**.
5. Inclusive and sustainable economic and social development to **promote employment opportunities and stable business** models that provide income and social benefits to the community and boost investments, improvements in infrastructure, facilities and services on the island.
6. Strong support for the promotion of entrepreneurship in **new lines of business of the industry and its international expansion**.
7. Efficient management of resources, as well as the use and production of energy, so that **the impact of tourism on island ecosystems and the energy cost of tourism activity are limited**, adopting as many measures as considered necessary.
8. **Clear commitment, both public and private, to the value of innovation and knowledge** as supporters of economic development and cooperative tourism management.
9. **Smart environments that favour quality tourist experiences** for visitors and improve the lives of residents.
10. Promotion of a culture oriented towards **valuing people**, their talent, knowledge, creativity and collaboration, as critical factors.



Strategy in the Area of Coordinated Management of the tourist destination / Governance

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This requires the participation of all participants, public or private, who intervene in the destination and encompass the different economic sectors, as well as the people involved, so that the development of sustainable tourism becomes a reality. Therefore, the management of tourism sustainability passes through the concept of Governance, as an allusion to the necessary cooperation between public and private entities and civil society in decision-making and in the establishment of strategies in order to achieve this goal.

Sustainable tourism development is an ongoing process that requires the participation of all relevant stakeholders, as well as strong political and institutional leadership to achieve collaboration and consensus, driving the necessary changes towards sustainable production and consumption models, adapting the institutional and legal framework, and guiding any type of intervention in the territory

(Pulido, 2006).

Axis 01_01 Co-Management / Coordinated management of the tourist destination.

Tourism is an activity that affects virtually all economic and social areas of the island: safety, infrastructure, health, laws, culture and heritage, and so on. However, paradoxically, the level of responsibility of the Departments of Tourism of the different island authorities on many issues incident to tourist activity is very low or non-existent. The same is true in relation to the budgets available exclusively for tourism management, which in the specific case of the Tenerife Island Council only accounts for three per cent of the council's budget.

In order to reach an optimum level of management of the tourist destination, a degree of cooperation and coordination is needed between the different agents and public administrations that integrate tourism. A central and transversal axis is required in the different areas of action identified as priorities for Tenerife in the coming years. Only in this way will an overall view be provided of the relationships and interconnection that keep tourism among the island's main objectives.

To this end, the following lines of work are proposed:

- **Share priorities and adopt consensus decisions** to assign responsibilities to the different authorities involved in the projects.
- **The Department of Tourism will be in charge of marking those aspects of priority action for the development of tourism in Tenerife.** It will be a task with a vision, beyond its own responsibility, which means involving the other necessary authorities in the management of the same.
- Likewise, and as part of a whole, the **Department of Tourism will assume its tourist responsibility by becoming involved in other areas or sectors of intervention**, which will in turn create a stable framework of cooperation and coordination.
- **Coordination extended to the municipalities of the island**, as well as to the areas where responsibilities of the Government of the Canary Islands and state administrations concur.



The Strategic Framework for Island Development (MEDI) 2016-2025 of the Tenerife Island Council is a first step forward in this work philosophy, while at the same time being also a first framework of collaboration to prioritize actions and investments at island level. Approved at the Island Council plenary

session on May 27, 2016, the MEDI aims to boost the economic and social improvement of the island, as well as address the challenges of budgetary stability for the next ten years. It is, in short, an instrument of planning and investment management, with a clear role for tourism.

This strategic framework establishes a joint approach to advancing an island model that combines its available resources, on the one hand, to achieve balanced development between the different regions and, on the other hand, to promote the capacities of the people. It is, therefore, configured as an element of coordination in itself.

It has an annual investment budget of 220 million euros and a planned execution period of ten years. In this sense, it determines the multi-annual planning of measures concentrated in five strategic axes and thirty-six programmes, which coincide with the priorities that the Island Council has defined as essential to boost the economic and social progress of the island. They are as follows:

- **Axis 1.- Tenerife 2030:** The 'Tenerife 2030' strategy establishes the objectives, programmes and lines of action in the areas of training, innovation, entrepreneurship, culture, sport and technology; these are understood as pillars of the personal and professional growth of citizens.
- **Axis 2.- Social Action:** This encompasses those groups that due to age, gender, illness or disability require special attention. Within this strategic line, those who are dependent will be given priority
- **Axis 3.- Infrastructure:** Investment in infrastructure has two main aims: the creation of employment and balanced territorial development. The objective is to ensure that the wealth generated is shared as equally as possible throughout the whole territory.

- **Axis 4.- Employment and Productive Sectors:** It includes measures aimed specifically at promoting employability, as well as all those economic measures in productive sectors that result in the creation of jobs. To this end, a series of adapted programmes will be put into operation that include orientation and job placement with the aim of keeping in mind the specific situation of different collectives.

- **Axis 5.- Sustainability and the Environment:** The strategic priorities of this axis are determined by a model of public use of natural areas which permits the enjoyment of diverse leisure activities compatible with the protection of the environment. The construction of an adequate infrastructure network and efficient management of natural spaces, in addition to the protection, conservation and preservation of insular biodiversity.

The philosophy behind MEDI can be exported to other areas of activity inside the Island Council, given the need to promote and facilitate the shared management of the tourist destination. To this end, the following lines are proposed:



01_01_01

Create shared management figures in the Island Council that generate a formal commitment to tourist governance.

At the island level it is necessary to put in place mechanisms or structures that favour and facilitate a culture of effective and coordinated collaboration between the departments and entities that make up the Tenerife Island Council.

The lines of work for a shared management would be:

- **Political-technical working group of tourist coordination.**
- Reinforce the management of existing inter-sectoral working groups with **management agreements**, either by tourism products or by areas of activity.
- **Creation of Tourism Management Consortiums** that act in territorial areas (as developed in Puerto de la Cruz) or in thematic areas (sustainability, product development, etc.).
- **Joint work with island town halls and local entities.**

01_01_02

Design of projects that, by their nature, require teamwork in various management areas.

In order to make operational some of the shared management figures mentioned in the previous section, it is proposed, as a methodology of work, shared management by projects, in such a way as to establish specific objectives to be achieved, thus clearly defining responsibilities and completion dates.

Some of the suggested projects are as follows:

Integral tourism safety plan

Whether in tangible or intangible terms, the safety offered and perceived by the visitor constitutes a central reference of the tourist activity in Tenerife. So much so that it stands as one of the central attributes of the island's tourist positioning. Hence, it is vital to provide the Department of Tourism Area of the Island Council with a more relevant role in the design and implementation of tourism safety plans.

In this task, the state security forces, local police, business sector and administrations with authority in tourism should be involved. In addition, as part of the existing security forces, a Tourist Police, with authority throughout the island and with capacity to attend tourists in different languages, is also included.

This Integral Tourist Safety Plan must be in line with the Intelligent Security Programme of the Island Council and contemplated among the actions to be developed in the MEDI.





Plan of aesthetics and island embellishment. Creation and budget appropriation of the island commission for the landscaping and embellishment of the tourist destination.

Tourism growth in Tenerife, disorderly in areas, raises the need to implement corrective measures in collaboration with other areas of the Island Council and the island town halls. To do this, it is necessary to identify and solve those aesthetic problems present in certain geographical areas, both within tourist and inter-urban areas.

The importance given to aesthetics and the care of the environment by those who visit us has led to the proposed formation of an **Island Commission for the Landscaping and Embellishment of the tourist destination**, dependent on the Island Council. This new institution would be responsible for the development of a Plan of Aesthetics and Island Embellishment, a scheme that would involve coordination with town halls, as well as constant education and awareness campaigns.

Creation of collaborative work networks with town halls through the INTEGRATUR programme as a shared management model.

The INTEGRATUR programme, which has been in operation since 2016, is the framework for the coordinated management of the tourist destination through the implementation of a joint network with all town halls, considered both tourist and non-tourist, in order to develop, create and improve the island's tourist offer.

From the organisation of the 31 municipalities into 9 regions work will be done on the prioritization of tourism products consensual with island strategy. This will allow, on the one hand, the consolidation of collaborative territorial units for the implementation of tourism products without administrative boundaries; and on the other hand, the management of island tourist projects.

Integratur will be the framework for the creation of new tourist products that can be offered to those who visit us, with the participation of local companies to help generate niche business opportunities.

Development of the employment and tourism entrepreneurship plan related to active employment policies.

Unemployment is considered to be one of the most important socio-economic problems in the Canaries and, although it is true that the tourism sector accounts for 25% of employment on the island (*Social Security affiliations in tourism*), and that four out of ten of each new contract formalised in Tenerife during 2016 were in the tourism sector (OBECAN), we must not stop working to get the drag effect on other economic sectors such as construction, business services, gastronomy and culture.

In order to achieve this, it is essential that the administrations work intensively to support the formation and commercialization of new tourist products that emphasize such important aspects as nature, culture, agricultural and industrial production. In the same way, the business community must make an effort to increase its competitiveness and its offer of value to visitors.

It is necessary that a specific employment plan for this sector is coordinated from the departments of employment of the different administrations, taking into account the current demands of employment and the forecasts of profiles and jobs to be demanded in the future. This sector is constantly changing and expanding and there are already forecasts of job demand for the near future by the business community.

With regard to entrepreneurship, Tenerife has the best conditions to be a pole of attraction and creation of tourist start-ups, since it has a very competitive sector in a controlled environment and with very attractive taxation.

It is in this sense that it is necessary to start an **Acceleration Programme specialized in Tourist Start-ups** that becomes a real enabler of local entrepreneurship and a means of attracting international talent. It is also necessary to implement very powerful financial instruments, both public and private, in order to support these initiatives in spite of the high risk that they can run.

Transversal project for sustainable recreation and tourism in nature (RETURNAT)

In recent years, the Technical Working Group for Tourism and the Environment has focused its efforts on coordinating actions related to the tourist use of Protected Natural Areas, both in the field of projects to promote ecotourism and sustainability, and in the promotion and dissemination of nature and the activities that are carried out in it.

From this joint technical working group the Transversal Project for Sustainable Recreation and Tourism in Nature (RETURNAT), led by the Department of the Environment of the Tenerife Island Council, was formed. There has been collaboration from a total of nine Island Council departments, twenty-nine island, town halls, three public companies and also the Natural Resources Management Service of the Government of the Canary Islands.

RETURNAT aims to meet the demand for contact with nature, which has not stopped growing in recent years, both by the local population as well as the millions of tourists who come to Tenerife every year. Its objective is to contribute by offering activities and facilities for recreation and tourism in nature, with the following objectives:

1. Generate a better knowledge and valuation of biodiversity and its conservation, increasing the coexistence between society and nature.
2. Improve the quality of life of the population, and especially, the local economy of areas close to the natural environment.
3. Reinforce the tourism value of the island as a sustainable nature destination.



Its objectives will be implemented through four lines of work:

■ **Line 1. Collaboration, active listening and innovation.**

A system of collaborative work by regions based on co-responsibility between the Island Council, town halls, other administrations, companies, associations and those who enjoy nature, so that everyone can be aware of the needs and new trends. It is about generating innovative proposals adapted to the demands of both those who enjoy the environment and the local population that supports the activities.

■ **Line 2. Offer of activities and facilities.**

A proposal structured by regions, visitor sectors and thematic routes. With a network of trails that connect nature, history, sport, culture, rural, urban and anthropic areas, whose use is integrated in a compatible way with each other and also with the conservation of nature.

■ **Line 3. Communication and awareness.**

All those people who enjoy the natural environment of Tenerife should have access to information, written in several languages, which is readily available and offers standardised content established from material shared between different bodies (Island Council, town halls and other participants). In addition, immediate communication of the state of the infrastructure, alerts and incidents must be transmitted, as well as visibly offering permit and reservation requirements and promoting the care of the resources with campaigns of sensitization against vandalism. All this is to be done with the availability of professionals in the management of sports activities.

■ **Line 4. Fine-tuning the infrastructure network.**

An effective management and maintenance system with common working criteria for all those involved, which in turn means involving those who make use of natural resources in the maintenance of the same through the appropriate tools.

Axis 01_02

Legislation affecting tourism

Given its strategic nature for the island, everything related to tourism should be considered by how many rules have a direct or indirect impact on this activity and their implementation. Although the tourism model existing in Tenerife during the last thirty-five years has been characterized by the collaboration of the public and the private sectors, tourist legislation should promote all the necessary mechanisms to foster such collaboration, serve as an impetus to new projects and initiatives and to integrate the externalities produced by the sector.

In this line, tourism legislation should benefit the action of the different levels of the Public Administration, and in particular that of the island, in order to make it transparent, agile and efficient, thus becoming a vehicle for the better development of tourist activity, and not an obstacle. To this end, there must be mechanisms and formulas for collaboration and coordination for the different public authorities, so that it seems that the exercise of each of these is unique. The aim is to provide the Government with criteria of **tourist governance** so that its activity is more efficient and can contribute to the reduction of the uncertainty in tourist investments.

In turn, a greater (and more active) participation of the Department of Tourism is required in all the regulations in the sector that are made at island level. With regard to non-island standards, the Island Council should follow up and have a presence in the processes of elaboration of these provisions. As for the private

sector, through the Tenerife Tourist Board, it must participate in the modification of legislative frameworks, both in its own and in other areas, that favour the competitiveness of the sector.

Among others, it is necessary to act in the following regulatory areas:

- Updating the field of Territorial Planning.
- Legislation affecting tourism actions.
- Inspection and regulation of tourist activities.
- Legislation that affects the new accommodation offer or adaptation of the existing one.
- Municipal ordinances.
- Legislation affecting tourist transport.
- Administrative procedures related to the tourism sector.
- Taxation



01_02_01 Updating the field of Territorial Planning

The legislation regulating land use must pursue two fundamental objectives. Firstly, **not to classify more land within tourist destinations** before exhausting that which is already available, including the possibilities of renovation. And secondly, **in terms of land planning, it should be simple, coherent and easily adapted to new demands.**

- Legislation should channel all legal, economic and financial means **towards the renewal of public spaces and establishments.** This would include formulas that offer an adequate margin of flexibility in the application of the norms on urban centres and more obsolete spaces. In this context, island tourist management should be included in the Island Management Plan and, in turn, urban planning should correspond to general municipal planning projects.

- Regarding the **necessary planning for the implementation of projects** (housing, equipment, etc.), this should be channelled through unique instruments that combine management and a project with its realization and progress. The regulation of such mechanisms must prevent discriminatory treatment and arbitrary application. Within this section it is necessary to strengthen the mechanism of the exemption of standards, but allowing its use by the island administration.

- Proposed **revision of the Territorial Plan for Tourism Management in Tenerife (PTOTT)** in accordance with the new laws

and regulations arising after its approval. The aim is to consolidate a territorial document of updated sectoral planning, which includes new housing trends and establishes procedures to allow the immediate and effective integration of any new needs and / or changes. This would also include the review and possible reduction of the tourist areas contained in the current document.

- **Updating of the Plans of Use and Management of Natural Spaces (PRUG),** with the participation of the Department of Tourism and the business sector with the objective of making spaces compatible with tourist activity.

- **Promotion of the Modernization and Improvement Plans (PMM)** of tourist areas as an operational management tool.

- **Return of island planning authority to the Department of Tourism.**

01_02_02 Legislation affecting tourist activities

One of the competitive advantages that Tenerife offers as a tourist destination in comparison with its competitors is the quantity and quality of activities that can be carried out there. However, these activities are not done in an orderly manner and are without an adequate legal framework, which creates a high level of business insecurity and the proliferation of illegal activities. Therefore, a minimum framework is needed to help regulate this aspect.

With regard to this the Government of the Canary Islands, through the General Directorate of Tourism Promotion and Planning, made public, on April 21, 2017, the Draft Decree approving the regulation that establishes the legal regime for the development of active tourism activities.

To continue with this regulatory exercise, the Tenerife Tourism Strategy 2017 / 2020-2030 must work on:

- The **updating of the regulations** to adapt them to the current characteristics of tourist activities.

- Consideration of the implications and effects of the **Active Tourism Decree for tourism companies regulated by non-tourist regulations**, such as diving, fishing, windsurfing, and so on.

- The **participation of the private sector in the development and elaboration of decrees or regulations** that affect its

activity, in order to know the reality of these companies and their specific conditions. This would involve participation in the subsequent regulation or inspection of compliance.

- **Flexibility of the rustic land protection regime**, in order to accommodate and boost new forms and trends of complementary tourist facilities in accordance with the values of the environment in which they are located.

01_02_03

Inspection and regulation of tourist activities

The improvement in inspection and regulation services is fundamental to provide coherence and safety for the tourist sector. In addition, it is the necessary framework to bring the confidence for attracting investment to the sector, as well as to avoid the appearance of illegal activity.

This entails:

- **Updating and measuring the instruments and effective means of inspection and sanctions** of non-legal companies. This means increasing the number of inspectors to facilitate and simplify the work.
- **Making compatible tourism and non-tourism regulations** that affect some sectors of activity.

01_02_04

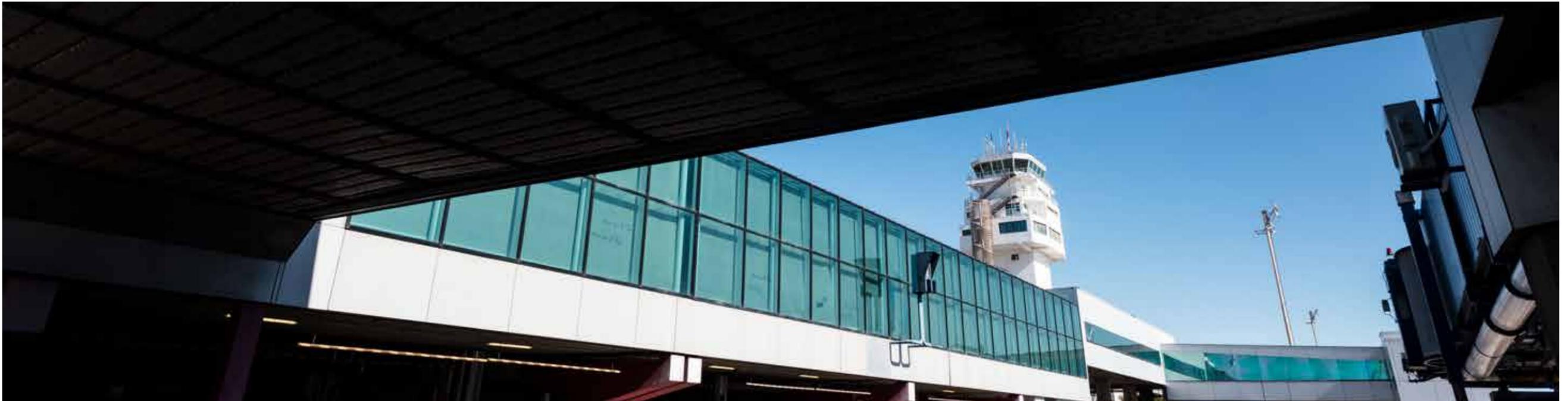
Legislation affecting the new accommodation offer or adaptation of the existing one

In terms of tourist use and its relation to other uses of the territory, the legislation should establish principles and criteria that ensure the complexity of uses and, in particular, the coexistence of tourist and residential areas. Areas of coexistence and areas of exclusivity should be established in accordance with the circumstances of each area in which tourist activities are taking place.

This task should correspond to island planning, based on more specific criteria such as saturation or density that allows the giving of reasonable and adequate responses to the real situation. This means:

- **Analysing in detail the implications for the island tourist sector of the development of the Holiday Accommodation modality.** In this sense, and given that the reality is complex, the norm must seek a balance that resolves conflicts rather than design theoretical models that creates them.
- Proposal regarding the possibility of **introducing different forms of tourist accommodation in protected areas, rustic land or nature zones**, respecting compliance with regulations.





01_02_05

Municipal ordinances

In the existing normative framework in the Canaries, municipal regulations have historically been given little importance. However, this is of strategic importance both for the management of certain tourist activities and for the maintenance of the aesthetics of the main tourist areas. In cases where there are adequate municipal regulations, the mechanisms to implement or enforce them have failed, although it is also necessary to avoid disparate regulations that undermine free competition and the image of Tenerife.

Hence, the unavoidable establishment of monitoring and surveillance instruments to ensure compliance with and adoption of the guidelines of the Plan of Aesthetics and Island Embellishment (Island Commission for the Landscaping and Embellishment of the tourist destination) proposed in *Axis 01_02*. In short, it would try to ensure correct compliance with the municipal regulations that affect the condition and appearance of tourist areas.

01_02_06

Regulations and legislation affecting tourist transport

The wealth and proliferation of certain tourist activities must have clear planning that allows the adequate transport of passengers and material in order for them to do such activities. These forms of transport, complementary to the guided type offered by the public and private sector, must also guarantee the appearance and putting into operation of a varied business offer and be at the service of an increasingly segmented tourism. This includes:

- **Adaptation of the regulations on Active Tourism Transport** to suit the characteristics and conditions of island activity and its companies.
- **Become more actively involved in the Transport and Mobility Working Group.** To transfer to this working group the needs and obstacles that affect the tourism sector, making them compatible with the regulations of safety and professionalism that the different activities must have.

01_02_07

Administrative procedures related to the tourism sector

Carrying out administrative procedures within tourist activity is often a difficult task that affects several authorities and entities. The business sector has to face a regulatory complexity that translates into difficulties and serious limitations when trying to carry out its work. Therefore it is necessary:

- **The implementation of a digital platform system** that groups the different administrations and access to telephone advice. Both tools will facilitate information on the conditions of authorization for tourist companies and the management of the necessary procedures.
- **Access to up-to-date and permanent information** on the web portal and / or at the electronic site to publicize procedures, actions, financial aid or grants, as well as measures for training and knowledge management linked to the promotion of the tourist sector.

- **Electronic management** of requests and communications of administrative procedures and resolutions, as well as the immediate knowledge of the status of processing of any type of application submitted.
- **The creation of channels of participation and mutual collaboration** for the simplification and more efficient management of administrative procedures. This in turn entails the strengthening of the information and communication channels between the Island Council and the other public institutions and private organizations linked to the tourist progress of the island.
- **Access to the information system of processes and procedures through the Electronic Headquarters of the Tenerife Island Council.**

Axis 01_03

Tax and tax collection tools applied to sustainable tourism development

01_03_01

Fiscal tools applied to tourism

The important contribution of the tourism sector to the island economy, both in terms of GDP and job creation, justifies it being accompanied by an attractive fiscal framework in order to continue the path of growth and quality, identifying and promoting before the corresponding authorities the fiscal tools that contribute to energize and further diversify tourism.

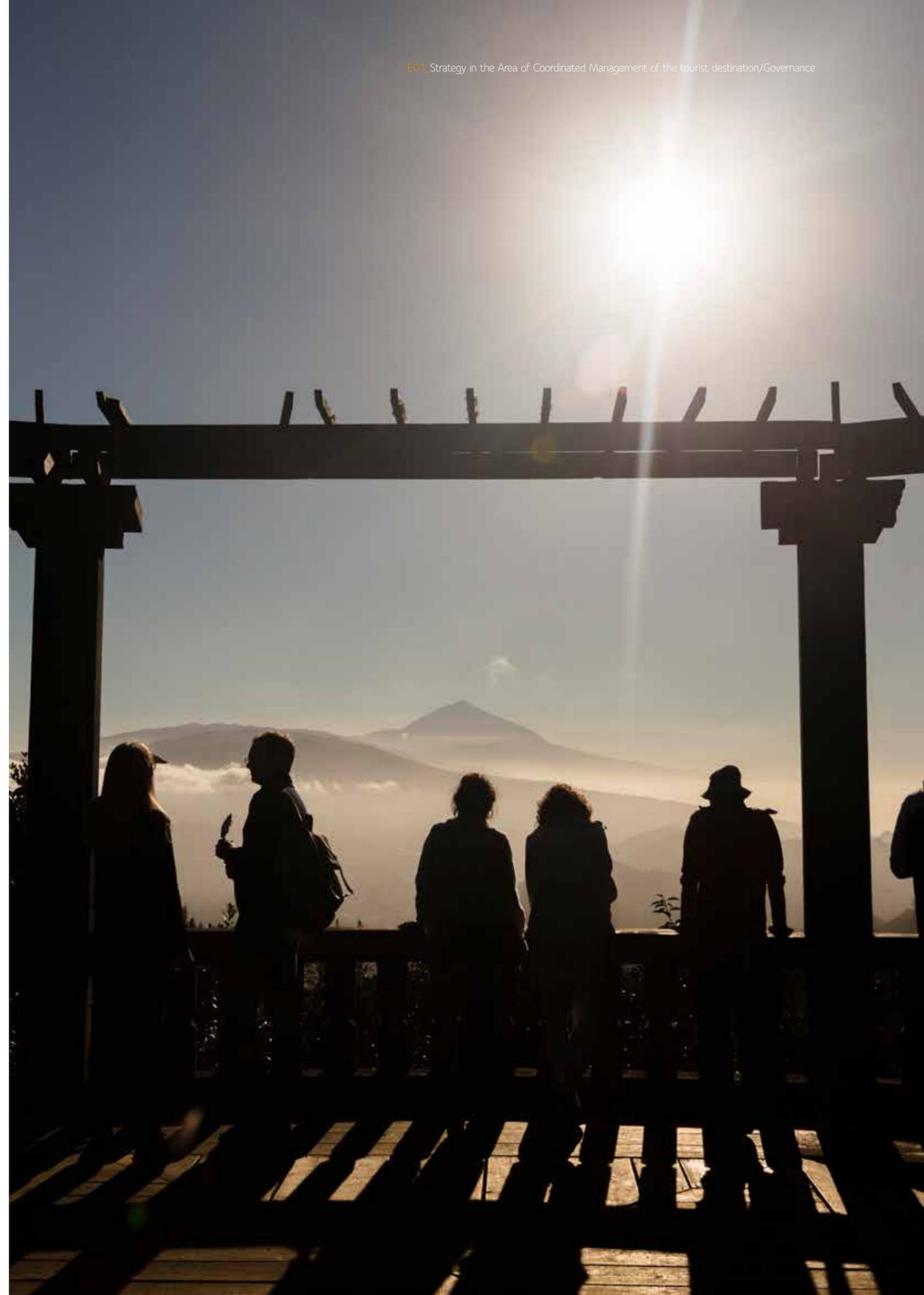
For this, the following instruments in tax matters are proposed:

- Working together with the Government of the Canary Islands to **include specific tools in the Canary Island Economic and Fiscal Regime (REF)** that favour the tourism sector.
- To increase the possibility of taking advantage of the tax benefits of the Canary Island Special Zone (ZEC) to those companies whose work is based on the “rehabilitation, renovation, remodeling or renovation of buildings or spaces linked to tourism”.
- To propose **tax incentives for the renovation of accommodation, facilities and tourist infrastructure**. For example, the exemption of property tax for five or ten years in the corresponding city council for the improvements and complementary investments that are made in hotel establishments in order to increase competitiveness and quality (new tennis courts, Paddle tennis, gyms, spa, restaurants, swimming pools, quays, etc.).
- **Agreements with financial institutions and the European Investment Bank** on soft loans for renovation and investment.

01_03_02

Taxation tools applied to the development of sustainable tourism

In a sector as competitive as the tourist sector, it is essential to analyse the parameters of the quality perceived by those who visit us, which allows us to maintain and increase the degree of loyalty. This makes it important to study the possibility of implementing access fees or use of services to ensure that the experience of those who go to a protected or special place are not affected by an excessive number of visitors. The objective of this tax should be to safeguard the quality and experience of our tourism, paying special attention to the maintenance of natural spaces and the treatment of resources and use of sustainable energy. To this end, a study should be carried out to make feasible the most appropriate tax collection instrument for island tourism with the drafting of a plan of objectives for the application of funds.





AXIS 2

Strategy/programme for the integrated improvement of the tourist destination and territorial development

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The previously mentioned *Strategic Framework for Island Development (MEDI) 2016-2025*, will be an axis upon which, to a great extent, the strategy for the improvement of Tenerife as a tourist destination will depend. This framework will be linked to other initiatives such as those defined in the *Tourist Infrastructure Plan for the Canaries (2017-2020)*, work that was started by the Canary Island government at the end of 2016 and which will determine what needs to be improved in tourist areas.

The MEDI establishes a joint strategy which puts forward a model for the island bringing together available resources to achieve balanced development between different municipalities and aims to encourage people's capacity through the connection with the 'Tenerife 2030' strategy (also promoted by the Island Council). It is a strategic model that has the pluriannual planning of events concentrated on thirty-six programmes and five axes of action: 'Tenerife 2030', Social Action, Infrastructure, Employment and Productive Sectors, Sustainability and the Environment. Specifically, this plan foresees an annual investment of 220 million euros until 2025.

With regard to the *Tourist Infrastructure Plan for the Canaries (2017-2020)*, promoted by the Department of Tourism of the Canary government, its aim is to provide island infrastructure with a clear tourist orientation which should act as a support to the development of products destined to this sector. In order to draw it up a participative process has been started to diagnose the deficits in tourist facilities and define priorities through the active involvement of the main people concerned (technicians, public officials and organised civil society).

Axis 02_01

Public/private management programme in the area of intervention in public/private zones linked to tourism

Interventions in public areas require, obligatorily, the co-ordinated management of the different areas of authority. For this reason, it is essential to have the integrated management shown in *Axis 01-02 Co-management/Co-ordinated management of the tourist destination*, with other entities that have authority over the zones where intervention will take place.

02_01_01

Public Spaces

Axis 4 (Employment and Productive Sectors) of the Strategic Framework for Island Development (MEDI) 2016-2025, frames the investment programmes for action in public tourist areas that will be carried out by the Island Council of Tenerife. Specifically, Programme 4.5: Programme of Strategy and Regeneration of Tourist Areas; as well as Programme 4.6: Tenerife and the Sea (although, as will also be seen in the line of work related to Tourism Product Improvement, there are several lines of the MEDI that contemplate investments in infrastructure and equipment that indirectly affect the island's tourist space).

PROGRAMME 4.5: Programme of strategy and regeneration of tourist areas

This programme is developed through two axes of intervention:

1. Measure to regenerate the public tourist space:

- **Actions of a priority nature and municipal responsibility:** at this level are those specific measures aimed at restoring the attractiveness of public spaces in the short term, such as street cleaning, immediate maintenance work and the review, updating, compliance and standardization of municipal ordinances. (See section 01_03_6 of this document).
- **Specific actions of regeneration and improvement of the public space:** includes measures in the medium term whose purpose is the achievement of a tourist destination of the highest level.

It is mainly centred on the most important tourist municipalities, i.e. Adeje, Arona, Puerto de la Cruz and Santiago del Teide.

2. Areas for improving mobility.

Although these improvements are detailed in section 02_02_3 *Infrastructures to improve and enhance tourist mobility*, its areas of impulse are:

- Creation of **strategic car parks** in the main tourist areas and urban centres.
- **Elimination of architectural barriers.**
- Intervention in the road network with the criteria established by the **Mobility Plans** and drafted measures.
- Promotion of **non-motorized modes of transport.**

PROGRAM 4.6: Tenerife and the sea

The actions included in this section are intended to improve and condition access to the sea on the island. Its objectives are:

- **To curb the tendencies, uses and management that have a negative impact** on the coast of Tenerife.
- Constitute an **awareness-raising tool** for a culture of sustainability of the coast.
- Create an experience of **participation and coordination** with public and private participants in the area.
- Serve as a conceptual and practical example of the **integral management of the coast and its tourist use.**
- To propose, in short, action programmes for the rehabilitation and integral management of the coast of the island.

'Tenerife and the Sea' includes the articulation of the procedure of collaboration with town halls and the Provincial Coastal Demarcation in order to put into practice the defined measures. A total of 140 geographical divisions distributed evenly among the twenty-eight coastal municipalities of the island, with special prominence of the pools at high tide, but which in any case will attempt to meet a series of criteria established in the said programme.

02_01_02

Renewal of private sector establishments, both accommodation and other sectors of activity linked to tourism

The obsolescence and deterioration of the environmental surroundings can become an important cause of the loss of competitiveness of some mature tourist destinations. This fact reduces the economic profitability of the establishments located in these areas. Therefore, the intervention of the public sector is fundamental to introduce incentives directed at private agents, either through the regulatory framework or through the implementation of programmes to improve their establishments.



The proposals would follow two lines of work:

Instruments to encourage renewal

- **Economic and technical reinforcement of programmes** such as 'Not Just Beds' (NSC) to improve the competitiveness and positioning of residential establishments. The NSC programme is an instrument which gives advice to the business community to guide and adapt the necessary renovation of establishments to the tourist model, either in the area where they are located or to the requirements and needs of the target audience according to the tourism model where it is located. In this context, there is a commitment to include a greater number of establishments and zones in such platforms, as well as their application, especially in places where they are going to undertake improvement work of the public space.
- Establish **incentives for improvement, renovation and rehabilitation**, both economic-fiscal and social or promotional.
- Participate in the **Canary Island Network of Innovation and Business Development Centres (CIDE Network)** as a tool to improve through innovation the management of shops and restaurants in the main tourist areas.
- Include **the commercial zones of tourist areas within the aid granted by the General Directorate of Commerce of the Government of the Canary Islands**, in order to encourage analysis and renewal of the commercial offer. Focus, within this programme, on formulas that help improve management and, therefore, the competitiveness of the commercial sector.

Advice and training for the business sector to adapt renovation to the tourist model

- A business advisory programme to **align the public / private renovation works that are carried out under the model of product and service development adapted to the different sectors of demand**. This will focus mainly on those businesses located in the intervention areas.
- Within the Programme of Action on Tourism Innovation, **a sub-programme is proposed in innovation of tourist business models** with three plans directed at three subsectors: commerce and restoration, accommodation companies and leisure and activities in nature companies.
- This will also allow the identification of areas that require measures and investments that will be included in the future **Investment Attraction Programme**, explained in Axis 09_01.

Axis 02_02

Comprehensive projects for improvement in tourist areas

In order to undertake general improvement processes affecting a tourist area, it is necessary to have a broader approach, a wider vision than that of isolated actions that, due to their obsolescence and / or loss of competitiveness, need the administrations to work together on joint actions.

To this end, the following lines of work are proposed:

- **Definition and identification of projects and / or areas in which to intervene:** in which the different interventions in tourist areas will be geared to align them with the product development model and prioritized sectors in the intervention area. Special emphasis will be placed on the interaction with the private sector.
- **The definition and updating of regional spatial / tourism development models** will be necessary to combine the intervention criteria appropriate to the priorities of the model.
- **The interventions will have, at the same time, plans to revitalise** the area and businesses and economic activities that take place in the intervened space.
- **In the intervened public spaces, the investment in streets and avenues will be linked to other equally necessary ones of renovation of establishments and businesses** that will benefit from the work. In this way, interventions will be prioritized in areas where there is an effective commitment to renew the private sector.
- **Establish formulas to manage the investment efforts** of the different public bodies and the private sector in an integrated manner.
- **Implement measurement systems** or indicators of socio-environmental return (welfare, quality of life, mobility, carbon footprint, among others) and economic (improvement of business ratios in the area, employment, etc.). In tourist areas this would allow for the readjustment of actions, as well as contributing to raise awareness about the need to extend to other places those examples of action that give visibility to these projects.

Axis 02_03

Infrastructure and facilities linked to tourism

One of the most important challenges to be addressed by Tenerife as a tourist destination is to provide a series of infrastructures and general facilities. This line of work focuses on infrastructures and facilities transverse to tourism, as well as on other infrastructures and facilities specifically linked to the different products of the sector.

These facilities and resources are grouped by character and / or nature in the following fields of work:

- Transverse **strategic infrastructures** (ports and airports).
- Infrastructure for **internal tourist mobility**.
- Infrastructures and equipment for technological **development in tourism**.
- Infrastructures and equipment **linked to each tourism product**.



02_03_01

Improvement of strategic transversal infrastructures (ports and airports)

The intervention to improve the strategic transversal infrastructures of Tenerife requires, as a previous step, to advance in the line of work *A01_STRATEGY IN THE AREA OF COORDINATED MANAGEMENT OF THE TOURIST DESTINATION / GOVERNANCE*. Given the scarcity of authorities and resources in the tourism area, it is essential to achieve the maximum degree of administrative cooperation to ensure an adequate level in strategic infrastructure.

Two of the main strategic infrastructures in Tenerife are:

Airport facilities

Transport and air connectivity constitute a strategic element for the development of tourism. This importance is increased when it is an island territory, where airport facilities play an irreplaceable role in ensuring the mobility of citizens and visitors, becoming a key factor for the generation of wealth and welfare of the island.

Thus, it is vital to increase the competitiveness of our airports as a guarantor of connectivity. These facilities must be improved to meet growing demand and to do so under optimum conditions of capacity, quality and efficiency. The work to be carried out at Reina Sofía Airport, an installation inaugurated in 1977, is of paramount importance and requires urgent action. In this sense, a study commissioned by the Tenerife Island Council in 2015 determined that the airport could reach 13.6 million passengers by 2025.

All this makes necessary:

- **The construction of a new terminal and a second runway at Reina Sofía Airport** with the aim of responding to the more than expected increase in passengers in the coming years. However, these measures are not included in the recently approved Airport Regulation Document-2017/2021 (DORA) in which only partial action is included to connect the two current terminals, an aspect that is considered insufficient by the Tenerife Island Council. The planned investment in DORA for Tenerife Sur airport will not cover the increase in traffic estimated for the coming years, taking into account, in addition, the special characteristics of a tourist airport that, due to the nature of its influx, requires specific needs such as luggage, security protocols and operational capacity, both at the terminal and on the runway, during the busiest times for airlines, tour operators and tourist passengers. Hence the need to start drafting the technical documents to have a project for a new terminal and second runway approved in the 2019-2020 period.
- The guarantee that the improvements in this infrastructure **incorporate criteria of accessibility and sustainability**, as well

as of tourist use in view of the high level of tourist use of this facility, which amounts to ninety-two percent.

- In relation to Tenerife North Airport, AENA will analyse and implement everything necessary to **facilitate operations in adverse weather conditions**, as required by DORA.
- **Inclusion of the Tenerife Island Council in the Coordination Committee of AENA.**

Port facilities:

One of the factors transforming the tourist reality of the island is the growing importance of cruise tourism. For this reason it is necessary to improve the port facilities, and with it, to guarantee a complete experience from the moment in which the vessels dock.

- In the case of Santa Cruz de Tenerife and its port, it is necessary to **complete the project that connects the Plaza de España** with this area (completed in its first phase), and put the new cruise terminal into operation.

On the other hand, and for a correct development of nautical tourism, it is important to start and conclude certain maritime infrastructures already foreseen in the MEDI:

- **Develop the port of Granadilla, the port of Fonsalía and Puerto de la Cruz**, vital for the development of their tourism due to their connection with this activity. In the case of Granadilla and Fonsalía, because, by transfer, they bring a decisive improvement to towns like Los Cristianos or the capital of the island, Santa Cruz de Tenerife. In the case of Puerto de la Cruz the planned infrastructure is expected to have a direct relationship with this tourist town.

02_03_02

Infrastructures to improve and promote tourism mobility

Tourist movement conditions the structure of the road network, and this in turn, conditions the natural environment and landscape that it crosses making it accessible and allowing its use, but it also involves risks of environmental impact that must be minimized. In this sense, the lines of work reflected are those already foreseen in the investment plan of the MEDI. The most significant are the following:

- Plan of priority actions **to improve and update the Tenerife road network**: road maintenance.
- **Carrying out of the planned projects within the road network**, especially the one that corresponds to the closing of the island ring road: the section between Santiago del Teide and El Tanque.
- **Improvements in TF-5**: a third lane for bus and high occupancy vehicles.
- **Actions in the TF-1**: the crossroads at Las Chafiras.
- **Improve the lighting installations** in the network of high traffic capacity.
- **Implementation of intelligent mobility systems**, based on Big Data analysis on mobility and tourism flows. The term smart mobility refers to a series of initiatives, policies and actions whose main objective is to promote traffic in cities so that it does not obstruct daily work. In short, these are actions intended to facilitate the mobility of people - whether on foot, by bicycle, public or private transport - under a common premise: savings in economic, environmental and time costs, which is precisely why they are given the term "intelligent".



02_03_03

Infrastructure and technological facilities for tourist development

The *Strategic Framework for Island Development (MEDI) 2016-2025* defines as Axis 1 the 'Tenerife 2030' strategy, which aims to achieve a well-prepared, more competitive, more sustainable, more cohesive and equitable, and better connected island. An island that is creative, innovative, enterprising and sustainable.

To achieve these objectives the 'Tenerife 2030' Axis defines five Programmes with their corresponding sub-programmes and lines of action. The first of them, Programme 1.5: Digital Tenerife is structured in four sub-programmes that will affect via digital development, directly or indirectly, the growth of tourist activity on the island. These are:

- Sub-programme 1.5.1: **Tenerife Smart Island (Project 'Tenerife Smart Island')**.
- Sub-programme 1.5.2: **Modernisation and Municipal Technical Assistance Unit (UMAM)**.
- Sub-programme 1.5.3: **Information System of the Tenerife Island Council**.
- Sub-programme 1.5.4: **The Information Society**.

In particular, the Tenerife Smart Island Project will work in the following areas:

Smart Platform:

Designed to provide transversal services to the multiple systems required in governance, offering, in turn, an "end-to-end" capacity for management, monitoring and control of the entire ecosystem of the island, including services provided directly by the Island Council such as those granted by town halls or external concessionaires. This project makes available to the administration in charge a unique and integrated vision of information on the state of the island and the management of services, facilitating the improvement of control centres and management decision-making.

Smart Destination:

Designed to combine the capabilities of mobile technology, the Internet of Things, augmented reality, geolocation, proximity beacons, and so on. In short, it is a service oriented to offer those who visit us all the information they may need to enjoy the destination to the maximum.

Smart Mobility:

It contemplates actions in the areas of Big Data analysis; Smart Mobility; Smart parking; fleet management and vehicle sharing; and Wi-Fi connection on board the trams.

Smart Security:

Attends actions of the Control Centre; fire prevention; drone surveillance; the monitoring of volcanic activity; and the Centre for Island Operational Coordination - Centre for Coordination of Emergencies and Security (CECOPIN-CECOES).

Smart Citizenship:

Designed to bring the administration closer to citizens, making available to mobile devices practical and intuitive solutions that until now or do not exist or are offered only through the electronic headquarters of public institutions, or in person.

Smart Tourism Platform:

A reservations aggregation portal that allows the generation of personalized offers, based on a single destination and integrating different experiences of possible interest for a particular person who wants to visit the island.

This set of plans constitutes the structural framework of technological projects directly related to tourism. The three remaining sub-programmes of the Tenerife Digital Programme will provide technological coverage indirectly, which will also contribute to the fostering of digital competitiveness of the island by allowing:

- Improvement in network infrastructures and associated services.
- Provide Wi-Fi reception in tourist areas and other points of interest in Tenerife.

- Favour the implementation of Wi-Fi connections as a basic service in tourist accommodation.

- Promote improvements in tourist security.

- Facilitate information.

- Provide the necessary basis for shared management in tourism.

- It will also allow the development of a technological and network needs project to promote in Tenerife the establishment of Digital Nomads, Teleworkers and other sectors of technology, in particular the audio-visual industry.

02_03_04

Infrastructure and support facilities linked to tourism product development

This specific line of infrastructure and support facilities linked to the development of tourism products will also be integrated in the section belonging to; *A04_DEVELOPMENT STRATEGY FOR STRATEGIC TOURISM PRODUCTS*

The priorities for the development of tourism products in Tenerife will be accompanied by the corresponding Infrastructure Programme necessary for their implementation and consolidation. Its content must integrate both infrastructure and facilities dependent on or proposed by the Department of Tourism, as well as those managed from other areas of responsibility so that all can contribute to design tourism products. These infrastructures will provide the necessary support for the development of each product.

Again, the framework of action of this programme is set out in the Strategic Framework for Island Development (MEDI) 2016-2025. Although its Axis 4, for Employment and Productive Sectors, contains investment programmes directly linked to the development of tourism products, the fact is that given the cross-sectoral nature of tourism in the island economy, many other programmes of the MEDI also contemplate investments in infrastructure and facilities that, indirectly, will support the activities and products that tourism consists of. These are:

- Programme 4.5: **Programme of Strategy and Regeneration of Tourism Space**
- Programme 4.6: **Tenerife and the Sea**
- Programme 4.7: **Tourism Product Improvement Programme 2016-2021**
- Program 4.8: **Historical Heritage Plan**

Specifically, the Tourism Product Improvement Programme contemplates the following objectives:

- **Formulate an island offer of tourism products and services** that strengthens Tenerife's competitiveness as a destination and its renewed position in the market.
- **Provide the island with the appropriate infrastructure and facilities**, new and / or reconditioned for the development of tourism products and activities.
- **Ensure the conservation and protection of the area** in which the products / activities are carried out, making it compatible with the responsible use of the same.
- **Promote the potential of tourism companies** in the areas of activity to be developed.
- **Link the improvement of the tourist space to the positioning of the island** and the development of its most relevant products.
- **Generate employment linked**, directly or indirectly, to active tourism and to the creation of products.
- **Foster cooperation between administrative areas** and participants in the implementation of tourism actions, as well as public-private cooperation and coordination.
- **Economic valuation of the resources** to be put into use as an essential part of the implementation of products destined to tourism.

Among the actions approved in the plan adequate infrastructure and facilities, new and / or reconditioned are included as they are necessary for the undertaking of activities. This will allow the carrying out of tourist actions such as the improvement and conditioning of beaches of tourist interest in Tenerife; the detection of tourist activities linked to the areas included in the Tenerife and the Sea programme; interventions on trails with greater tourist potential, the improvement of tourist sign-posting; the expansion of the BICA (Bicycles and Horses) Network, which, among others, make up the actions foreseen in this programme.

The actions for the development of products and tourism activities, although contemplating a vision of island and integrated development, should be carried out in those territories and / or spaces in which the resources to be used are located. It is for this reason that the INTEGRATUR project, already mentioned in Axis C 01_01, is fundamental for the drawing up and implementation of this infrastructure programme through the creation of a joint framework with all town halls, in order to develop, create and improve the island's tourist offer.





AXIS 3

Strategy in the field of transport, access to the island and internal mobility

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Mobility in tourist environments presents a series of peculiarities. Tenerife, given its wealth of resources distributed throughout the island geography, must develop good management of mobility to increase the difference with other competing destinations, with the ultimate aim of improving the experience of those who visit us.

Sustainable mobility management will make it possible to offer quality tourism and reduce the negative effects of tourism development on the environment.

Currently there is a Technical Working Group of Tourism and Mobility in which are integrated the Departments of Roads, Tourism and Mobility of the Tenerife Island Council. Its objective is to solve and to treat the problems and need for improvement in the field of internal tourist mobility. Certainly, a working model to be exported to other areas of tourist transport.

Axis 03_01 Air Connectivity

There is a direct relationship between the connectivity of an island and the number of tourists it receives. Without aeroplanes tourists do not arrive and any change in the world of air transport can directly affect a tourist area. However, connectivity itself is not the end, but a tool to facilitate the growth of a destination as a whole and more specifically its priority markets, regardless of whether the goal is to open a new market or grow in a traditional one.

According to several studies, a destination loses up to sixty percent of potential customers if there is no direct connection at a reasonable price. This is even more significant in the case of Tenerife, which because of its ultra-peripheral island condition, depends 100% on air connectivity to bring in tourists, as there are no other viable ways to reach the island. Other destinations, however, do not depend so much on air connectivity because they have terrestrial and maritime transport systems.

Moreover, in order to respond to the objectives defined in this document, it is necessary to establish a cross-connectivity strategy where not only priority is given to the growth in the number of places, but also to other aspects that affect the sector. All this in order to coordinate efforts with those responsible for the two airports on the island, so that the infrastructure can respond adequately to the needs of the destination taking into account, in addition, the entry into the market of an important volume of new accommodation places during the period of validity of this

strategy, which are close to five thousand. This will mean that in order to occupy the additional accommodation offer, Tenerife will require an approximate increase of 40 weekly flights, which in turn would need to be able to operate in an adequate and comfortable time frame for the tourists.

Therefore, the island's airports (in particular Tenerife South) will need to have an infrastructure with adequate capacity to respond to both this increase in passengers within the terminal and the increase in the number of operations on the runway, which is already saturated on certain days.

All this contributes to the strategy of Tenerife's air connectivity for the next few years, working to achieve the following objectives:

- **Improve connectivity** with European countries and traditional markets where supply does not adequately cover the growth of tourist demand.
- **Strengthen the operation of regular routes** in traditional markets where only charter traffic currently operates
- **Expand the establishment of airline bases at island airports**, not only for the opportunities to increase air routes, but also for the generation of economies of scale and the employment that these bases would create.
- **Development of connectivity in other areas** such as Africa, North America and Latin American countries, promoting the opening of routes in new markets where opportunities have already been detected, such as in the United States, Canada, Brazil, Israel and Eastern Europe.

- **Attract new operators** in order to diversify and minimize reliance on existing operators.

- In order to open markets of interest that still do not generate sufficient air demand to support a point-to-point direct line, enhance and **improve indirect connections**, obtaining the collaboration of new Groups or Air Alliances. This will reduce the current dependence on airlines that are limited to point-to-point connection options.

- **Increase the number of business class seats**, attracting new air operators that offer this type of offer and working with existing ones to increase their number of seats offered as a way to meet the specific needs of the luxury sector. This line of work also leads to the recruitment of new Groups or Air Alliances

- **Contribute to the competitiveness that airlines offer in fares for air tickets** and fares for transporting special equipment or sports equipment, necessary for tourist activities.

- **Work together** to comply with the **quality indicators of the Airport Regulation Document 2017-2021 (DORA)** at both airports.

Axis 03_02

Maritime Connectivity

In recent years there has been an increase not only in the number of cruise ships that visit the island and the number of operators, but also in the number of itineraries that include Tenerife as a destination.

The Port Authority has invested in the creation of an important maritime connectivity infrastructure with the implementation of a first rate terminal, unique in the Canary Islands, which will make the island more competitive. This infrastructure allows shipping companies to make Tenerife a base port, which will lead to the important consequence of improving, in turn, the air connectivity of the island: on the one hand, with an increase in the demand for new routes from abroad; and on the other, with an increase in the number of "Cruise & Stay" tourists.

In addition, each port base will have repercussions on the economy of Tenerife, as they will need services and supplies in Santa Cruz that have not been required to date. It is also important to increase the number of stops in Tenerife since these one-day stops are when the largest number of excursions is contracted, generating income for the local business network.

The permanent collaboration between the Tenerife Tourist Board and the Port Authority of Santa Cruz de Tenerife for the promotion of the island as a cruise stop is proposed through the following points:

- **Foster the synergies generated by cruise port traffic for Tenerife's air connectivity** and vice versa, with the objective of increasing capacity in both ports and airports. The increase in port traffic would also generate an increase in overnight stays.

- In relation to this point, it is important to **analyse possible labour demands** that may be generated by the stopover of cruises in the base port, and provide the necessary training to attend them and offer competitive services.

- Cooperation for the **adaptation of promotional material** about Tenerife specifically for cruise tourism, as well as information about new products.

- **Diversify the offer on the island** by creating new products and excursions of interest for cruise passengers, while offering high value services for cruise crews and ship supply services.





Axis 03_03 Internal tourism mobility

Mobility for leisure and recreation has grown considerably in recent times, boosting the economic development of many regions with resources and attractions for leisure, but especially tourist areas.

This type of mobility involves both the tourist and the resident population in activities of leisure and recreation. However, the measures taken towards this aim are generally well developed for conventional urban environments, where the pattern of mobility continues to be linked to travel for work and study, and not to the environments in which tourism is a predominant component, where mobility is relegated to a lesser plane.

The movements of tourists and residents for leisure and recreation activities are quite different from those for work or study because, in the latter, the valuation of time and needs are quite different. In this sense, the measures that are undertaken for internal mobility must contemplate this specific point.

In any case, the link between the tourist sector and the transport sector goes beyond a mere need for movement. The means of transport and mobility are sometimes part of the product itself,

allowing tourists to reach their destination with the travelling being an activity in itself. Thus, tourism and transportation form an inseparable bond. A large number of destinations, and activities and resorts depend for their existence on a means of transport.

Currently Tenerife has a transport fleet of 685,500 vehicles, of which 468,000 are cars, 68.3% of the total. 0.4% are buses (2,473 vehicles) and the rest of the fleet consists of other types of vehicles such as trucks, vans, tractors, motorcycles, and so on. Tenerife's transport fleet grew by 3% in 2016 compared to the previous year, with an additional 19,000 vehicles being added to the island's roads.

Tenerife has one of the highest ratios of cars per 1,000 inhabitants in the Canary Islands, with 525 per 1,000 inhabitants compared to the average ratio in the archipelago of 508 cars per 1000 inhabitants. Lanzarote has the highest rate with a ratio of almost 559 cars per 1,000 inhabitants.

The car rental sector in the Canary Islands represents around 20% of vehicle sales. It was precisely this activity that prevented the collapse of the Canary car sector in the years of the economic crisis when it accounted for 40% of car sales in the Canary Islands.

The number of rental vehicles travelling on the island's roads is estimated at about 35,000 vehicles. In the case of the tourist population, 37% rented a car for an average of seven days during their stay in 2016.

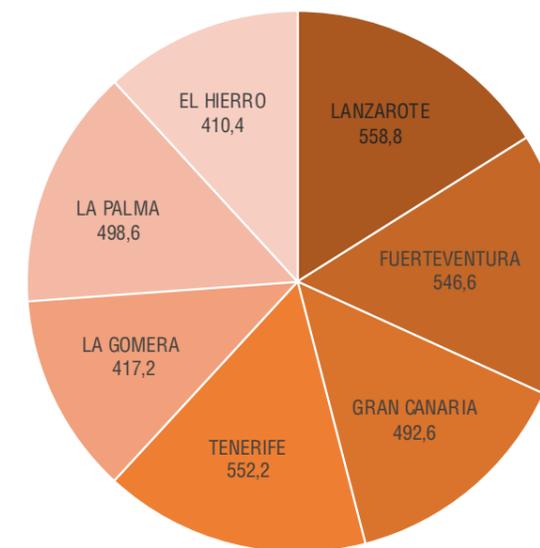
The mobility of tourism in Tenerife is high, taking into account that 56% of tourists visit the tourist attractions on the island. These trips are mainly done in rental cars (34% of trips); on transport linked to organized excursions (18%); or by public transport, ei-

ther by bus or taxi (10%). These means of transport are often combined for different journeys.

The assessment made by the people who visit us about different aspects related to movement around the island was given an average score of 7.73 points on a scale of 0-10 points. However, certain factors drive down this assessment, such as parking, traffic congestion and road safety. Other elements obtain higher ratings than the average score, such as the state of the island road network and public transport.

In general, traffic congestion is one of the most repeated complaints made in various mobility assessments and tourists also express their discontent about road signalling, which is another aspect that requires more attention.

CARS PER 1,000 INHABITANTS IN THE CANARIES



FUENTE: ISTAC. ELABORACIÓN: Turismo de Tenerife

03_03_01 Improvement of collective transport on the Island

To make the tourist experience in Tenerife better it is necessary to improve and develop a more powerful collective transport system, which entails:

- **Incorporating the specific demands of tourist mobility** among the priorities of the Island Council Department of Mobility.
- **Improving public transport services** and connections in areas dedicated to tourism, as well as expanding the frequencies and routes that connect the main tourist areas, both by TITSA and by optimizing discretionary transport.
- **Creating connection lines** between the two island airports, as well as between the airports and the main tourist centres.
- **Establishing a plan to improve bus stops:** this is related to road safety, comfort and accessibility.
- **Promote the public transport services that connect with the Protected Natural Areas of Tenerife and its main tourist attractions,** expanding frequencies and routes. Specially, to promote the public transport lines that connect with the Teide National Park.
- **Adapt and improve public transport services for tourist use:** information, points of sale, use of mobile applications, languages, and so on.
- **Build new bus and tram stations and optimize existing ones** to promote the combination of different modes of island transport.
- **Introduce guided transportation systems complementary to the bus,** and highlight the Northern Train and Southern Train projects.
- **Promote the drafting and implementation of Business Mobility Plans.** Currently, the FIT, together with GF Hotels, is developing a Mobility Laboratory pilot project in order to implement sustainable mobility solutions for its workers in establishments located in the south of the island.

03_03_02

Integral Model of Sign-posting on the Island of Tenerife

With the economic and tourist development of Tenerife, there is a great deal of movement of drivers and visitors on our roads and trails, which makes it essential that the sign-posting model works effectively.

In order to meet this demand for travel, the following problems in terms of sign-posting have arisen:

- **Excessive heterogeneity of signage** that responds to local demands for information.
- **Outdated sign-posting** in the face of the changes that the road network has undergone and changes to the offer of sightseeing spots in the municipalities of the Island.
- **A discontinuity of the messages transmitted along the route**, due to the lack of coordination between those responsible.

Therefore, the objective is to complete the work started in 2010 with the implementation of the island road sign project. It is necessary to continue with a new model of signs for the whole island of Tenerife that is standardised and integrated for orientation and tourism. Specifically, the objectives to be pursued are:

- **Improve the road signs** in Tenerife, especially those of municipal scope.
- **Incorporate tourist sign projects**, with the aim of providing quality and standardisation in protected natural areas.
- **Establish a complete signage system unifying formats, styles and graphics**, with the approval of these criteria by the Island Council, and paying special attention to the maintenance of the same.
- **Implement Smart Sign projects**; users design their own itineraries on mobile devices.



03_03_03

Transport adapted to the needs of active tourism

Active, sports or adventure tourism is, in most cases, linked to travelling in vehicles which are specially adapted for the activity. Transport use is subject to the need of the tourist, organizing companies and the geographical area in which the activity is to be carried out. In this way, the border between transport and tourism is blurred.

Leisure and recreation represent the central axis for Tenerife as a tourist destination, which will allow it to become competitive in the future, occupying a relevant space in all tourist strategies both island and regional. For its development it is necessary to integrate all the areas involved, of which transport is inseparable. As has been seen, transport and mobility are integrated into tourism, forming part of Tenerife as a destination and forming this inseparable mutual bond.

In 2016, just over 56% of the tourists who visited the island took part in some tourist activity during their stay and a similar percentage went to town centres and tourist attractions in order to get to know them. (Tenerife Tourist Board, Tourist Situation Report 2016).

The economic impact for Tenerife of tourism activities is very significant, contributing in 2016 around 250 million euros directly from leisure activities and more than 2,313 million euros of income from the full holiday sector. This is an important amount, taking into account that it represents 12.4% of income in destination and 6.4% of total income. (Tenerife Tourist Board, Tourist Situation Report 2016)

Many of the active tourism activities require support materials for the practice of the said activities. Transport, both public and private, lacks the conditions of space and safety required for the transfer of equipment, as in the case of sports equipment for cycling, mountain biking, diving, golf, and so on.

To this end, it is necessary to adapt the means of transport to the specific needs of the transport of materials and specialised equipment for the practice of tourist and leisure activities. Specifically:

- **The specialisation and growth of nature tourism activities demands the adaptation of public transport to its special conditions**, mainly in relation to the material necessary for it, which, in many cases, by the very nature of leisure practice, is not in the cleanest of conditions or requires more space or specific safety measures.
- **There are needs to be considered in both public and private transport**, analysing and making feasible improvements that in addition to responding to active tourism practitioners, promote sustainable mobility.
- **The improvement of information to the transport sector** about the demands of the people who carry out these tourist activities is fundamental, since in many cases it is not receptive to the transport of certain material.
- These demands should be **extended to the transport that makes the transfers from airports and ports**, the main points of entry and exit for tourists.

On the other hand, this sector of tourism is subject to compliance with Law 13/2007, of May 17, on Road Transport Planning in the Canary Islands, approved by Decree 72/2012 approving the Regulations of Development of the aforementioned law and the subsequent Order of May 15, 2015, which delimited certain conditions for the realization of transport for leisure and recreation activities with special equipment.

The age of the vehicle, the limitation of the number of cards per company (most of them multi-activity) or the demands of rigid physical separation between the terrain and the transport of material are some of the factors that the sector has been manifesting as limiting the quality of the service that it offers and that, at present, are aspects that make up, among others, the current legislation.

On October 28, 2016, the General Directorate of Transport of the Government of the Canary Islands published the initiative for the amendment of law 13/2007, of May 17, on the management of road transport in the Canaries, which specifies literally the reasons for its modification and proposes:

1. **To update and rationalize the legislative structure of road transport** in the Canary Islands, adapting it to the new technical and normative circumstances that have occurred since the approval of Law 13/2007.
2. **To clarify, at the request of the transport managers of the Island Councils, contradictory aspects of the present legislation**, after the different modifications to the Law of Road Transport Planning in the Canary Islands (LOTCC).
3. Establish normative channels to enable the **adaptation of Canary land transport operators to the new realities of road transport**, derived from new forms of contracting and the incorporation of new technologies.
4. **Eliminate duplications and contradictions of Canary transport regulations** with state and regional regulations for the exercise of road transport activity, with the consequent legal insecurity that this generates.

It is therefore the object of this strategic axis to continue requesting the updating of these regulations, as it is not only this tourism sector that is affected.

Axis 03_04 Sustainable Mobility

Sustainable mobility in tourism is a major challenge given the environmental pressure that transport exerts on a territory and the inherent travel within the tourism system, as well as the associated social and economic effects.

The transport policy of the European Union places transport among its priority axes as it constitutes a key sector of economic activity that contributes significantly to the economy (4.8% of gross added value for all twenty-eight members, equivalent to 548 billion euros) and generates more than eleven million jobs in Europe.

Therefore, the European Commission aims to develop and promote efficient, safe and sustainable transport policies that create the conditions for a competitive and job-creating, prosperous industry.

In particular, the European Union identifies the main challenges facing transport systems, mentioned below, which are not only priorities in the European context, but also in the national and regional environment:

- **Congestion** of roads and air traffic: this already has a cost of about 1% of annual European GDP and the forecasts are that passenger and freight transport will increase.

- **Dependence on oil:** despite the increase in efficiency, transport still depends on this fuel to cover 96% of its energy needs. In the future, oil will be increasingly scarce and has to be obtained from unstable regions of the planet.

In addition, by 2050 the price will have more than doubled compared to 2005.

- **Greenhouse gases:** by 2050 the European Union will have to reduce emissions by the transport sector by 60% compared to 1990 levels if global warming is not to exceed two degrees.

- To homogenize the quality of **the infrastructures** of the twenty-eight member states.

- **Competition:** the European Union's transport sector faces increasing competition in rapidly expanding transport markets in other regions of the world.

With regard to tourist transport, the European Commission estimates that tourism mobility and transport currently account for 8% of CO2 emissions in the European Union, with the use of the private vehicle being responsible for 41% of the emissions of these gases from total tourist journeys. Going deeper, of all the CO2 emissions of the tourism sector, 75% is due to the transport of tourists.

That is why the European Commission supports research and innovation, as well as the effective deployment of new green transport technologies. For example, the new rules oblige member countries to promote clean technologies (such as electric or hydrogen cars, trucks, barges and gas-powered ships) by installing a minimum number of **recharging and refuelling stations**.

In relation to the island of Tenerife, the *Strategic Framework for Island Development (MED)* 2016-2025 also defines in its Axis 5: Sustainability and Environment, specifically its Sustainable Mobility Strategy Programme 5.9, two main lines of work:

5.9.1:

- Implementation of recharging points for electric vehicles.
- Development of a network of recharging points as well as fast recharging points.

La 5.9.2:

- Renovation of corporate fleets of vehicles.
- Replacement of corporate fleet vehicles with eco-efficient vehicles

In line with island priorities, lines of work are proposed in three specific areas:

- Programmes in **zones and areas of sustainable mobility**.
- Extend the **use of the electric car in the tourist sector**.
- Promote the **use of bicycles in the tourism sector** as a means of sustainable mobility.



03_04_01

Areas and spaces of sustainable mobility

Some of the measures to be implemented in Tenerife in order to improve sustainable mobility and respect for the environment could be:

- **Design pilot sustainable mobility programmes in specific areas of the island:** establish sustainable mobility zones and promote pilot projects in specific areas.
- **Create sustainable urban areas:** delimit some urban areas with restricted access, allowing only the circulation of sustainable vehicles.
- **Apply innovative tools to promote sustainable mobility:** promote tools that enable collaboration between individuals, such as working with the university to develop a vehicle sharing system.
- **Improve collective transport on the island** as a way to promote a more sustainable mode of travel than individual travel.
- **Analyse alternatives and promote the implementation of "last mile" mobility solutions for people and goods that complement public transport:** electric bikes, electric skates, shared taxis, minibuses, among others.
- **Increase the drafting and implementation of Business Mobility Plans.**

03_04_02

Extending the use of the electric car in the tourism sector

Currently, only 0.02% of Tenerife's vehicle fleet is electric, with a figure in 2016 of 115 vehicles, although this number has doubled between 2015, with a fleet of 57 vehicles, up to the present day.

The other growing sector is that of LPG vehicles, which in the last year represented a fleet of 192 vehicles in Tenerife, 61% more than the 119 existing vehicles in 2015.

Faced with these data, the proposals to extend the use of electric cars in the tourism sector are:

- **Give impulse to the shared management** of this project between the Departments of Tourism and Promotion of the Island Council. Active participation of the car rental sector.
- **Introduction of the use of electric cars and hybrid vehicles in the car rental** sector using incentive tools.
- **Base infrastructure for electric / hybrid mobility.** Expand the island network of recharging points, prioritizing its implementation in tourist areas, roads with greater tourist use and in tourist attraction areas in Tenerife.

03_04_03

Promoting the use of bicycles in the tourism sector as a mode of sustainable mobility

There is now a general trend in which mobility based on the motor vehicle is replaced by a new one, in which the pedestrian and the cyclist are protagonists. This is particularly important in tourist areas: the enjoyment of the environment can be enhanced by bicycle-related infrastructure and services.

Specifically:

- **Promoting the use of the bicycle in urban tourist areas** and other tourist areas where use is permitted.
- **Expanding the construction of cycle lanes** in urban areas.
- **Promoting innovative models of management or public concession of bicycle loan** in the main tourist areas and in Santa Cruz - La Laguna.
- **Promoting the image of Tenerife as a *Bike Friendly* destination** to contribute to the dissemination and promotion of the use of bicycles among those who visit us, either as sports use, leisure or simply for mobility.
- **Educational and awareness campaigns**, both for pedestrians and drivers and among cyclists themselves.

AXIS 4

Programme for the Development of Strategic Tourism Products

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Given the transversal nature of strategic tourism products, this programme should mark for each one a series of indications on the requirements that are necessary for their development on the island. These conditions will be grouped and later worked on both from comprehensive programmes and from specific programmes in this tourism strategy, as well as in strategies and work plans belonging to other areas of responsibility and management in Tenerife.

For this purpose, the initial development of the *Specific Strategic Product Development Plans* will contemplate the entire development process necessary for each of the prioritized products. These will include planning the necessary work in the areas of: management, regulations, environmental requirements, infrastructure and facilities, related support services, development of supply companies, training and employment, demand, as well as positioning, communication and promotion, and research and innovation.





Prioritization Criteria for Product Development

The criteria chosen for the prioritization of the products to be implemented in Tenerife in the coming years correspond to the following process:

Firstly, the criteria on which the products to be developed are prioritized are defined, which will set the guidelines for decision-making in operational planning. This will mean being able to make decisions throughout the different planning phases.

This multi-criteria framework will also serve to establish indicators to ensure an Operational Planning of Tourism Products in a consistent, balanced and effective manner. These criteria are grouped into:

Market criteria: Demand / Offer

In addition to the supply and demand of tourism are criteria related to global marketing and promotion, and positioning and commercial strategies, among other elements. Here we include:

- Products that **improve the tourist competitiveness** of the Island.
- Products that **reinforce the image of the destination** and are part of the fundamental motivation of a trip to Tenerife.
- Products and services that are **demanding at an international level** while being able to seek synergies and be compatible with other products already in existence.
- Loyalty products, which strengthen the idea of the product as an **identity element** at island level.

Structural criteria

These are mainly associated with the infrastructures and the necessary equipment for tourist activity, and the socio-economic fabric of the tourism sector of reference. Both spheres accommodate:

- Structural elements to be used for **tourism development**, guaranteeing its conservation status.
- Products that take **advantage of existing infrastructure**.
- Infrastructures and means of communication that **ensure the accessibility** of the product to those who use it.
- Investments in **new infrastructures**.
- Products that can count on an **offer of accommodation or specialized support and related services**, such as transportation, safety or health resources.

Economic criteria

These have to do with the economic performance of the products, that is to say, the generation of employment, profitability, financing, etc. They include:

- Tourism initiatives and services that have a tangible impact, either directly or indirectly, on **island economic development** and that generate a measurable degree of welfare for the local population, making compatible the tourist use with the public-citizen use.
- The tourism product must have the **capacity to generate inter-sectorial synergies**.
- The tourist product should aim for **quality**.

Environmental criteria

These are those related to the elements of tourist use linked to the environment, reinforcing aspects such as: the management or use of protected natural spaces; waste minimization and energy efficiency; identification of sustainability indexes applied to products and the responsible use of natural resources, among others.

- The product should **minimize environmental impact**, especially at the level of access and infrastructures. This implies prioritizing the reuse or optimization of facilities to the construction of new elements.
- The tourist product should **seek coherence with the island's identity**, prioritizing those who give value the unique elements of Tenerife.
- The product must demonstrate its ability **to fit into the island tourism scheme**, prioritizing those that highlight the special qualities of Tenerife.

- The tourism product should **seek consistency, establishing synergies and complementarities with endogenous resources**, as well as with other products already established on the island.

- The tourism product contributes to the **protection and conservation of the territory** where it is developed (with special attention to protected natural areas)

- The product should concentrate on those island resources identified with the island of Tenerife, making its **tourism use compatible with the conservation of the same**.

Regulatory criteria

These contain regulations, laws, decrees, regulations, provisions and all those legal conditions that mark the evolution of tourism products in the autonomous, national and international sphere. This implies:

- Supporting the development of those activities that have an **updated and controlled regulatory framework**.
- Optimizing the resources in those products that **present simple administrative procedures** for the development or start of the activity.
- To support those tourist sectors in which the business fabric **respects the regulatory framework** that governs the activity.

Innovative criteria

It is a priority to focus on identity, innovation and territorial balance, hence prioritizing:

- Products that have the creative ability to bring **new business opportunities** to the current "sun and beach" model.
- Products that **diversify tourism throughout the island**, boosting other areas to those already overexploited.
- Products that **revalue the culture and identity of Tenerife**, promoting direct contact with local populations without saturation or possibilities of rejection.

Based on the above, products, activities and tourism sectors have been prioritized at three levels so as to put in order the actions necessary for their development.

Tourist activities

Core Activities

Climate/Beach-coast
Hiking
Cycling
Golf
Gastronomy
Surfing/bodyboarding
Windsurfing/Kitesurfing
Diving
Cultural, traditions and heritage tourism
Whale and dolphin watching
Theme parks
Excursions/visits

Secondary activities

Paragliding
Astronomy tourism
Kayak
Stand Up Paddle
Sailing
(yachting/sport fishing)
MICE/business tourism linked to TCB brand

Activities with potential

Bird watching
Medical tourism
Health/Wellness tourism
Free diving
Rural/Eco/Agro-tourism
Weddings/Honeymoons/
Romantic breaks

Other activities

Climbing
Shopping
Language tourism

Tourist sectors

Family tourism
Senior citizens
Luxury/ linked to the PREMIUM brand

Axis 04_01

Strategic programme of requirements in destination for the development of priority products for the island

The ANNEX contains an advance of the plan for the development of each of the priority tourism products and activities, with special emphasis on the requirements that will be necessary to enable their development from different areas. These conditions cover, in a transversal way, the entire value chain of tourism-related service offers, focusing on the different strategic axes and programmes detailed throughout the Tourism Strategy, depending on the current state of development of every product in Tenerife. These programmes are:

- Programme in the field of coordinated management.
- Regulatory adaptation programme.
- Programmes of intervention in areas linked to tourism.
- Linked infrastructure programme.
- Investment attraction programme.
- Programme in the field of transport and mobility.
- Programme in the field of business competitiveness.
- Sustainability requirements.
- Support programmes of Tourism Intelligence and Innovation.

See ANNEX of TOURIST ACTIVITIES

Axis 04_02

Strategic programme of positioning and communication linked to the development of products

A specific positioning and promotion plan will be developed for each product or general tourist sector, which also includes the necessary adaptations of these plans to the particularities of the relevant markets in each activity and sector.

In each product or market plan the priority geographic niches will be identified for each activity, as well as the particularities to be taken into account in each of these markets.

As a starting point for prioritizing the different markets of origin, the overall promotional prioritization of these markets is taken as a reference, for which three criteria are applied: knowledge, connectivity and potential. From this perspective, the markets of origin are classified into three levels of priority, as shown in the table below.

Subsequently the potential of each market is crossed with the different tourism activities, which are also prioritized, to develop in the coming years.

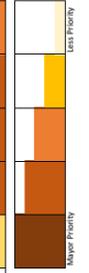
See TABLE: PRODUCT / MARKET PRIORITIZATION

Prioritizing Markets of Origin

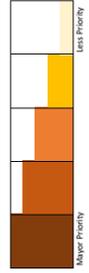
Markets	KNOWLEDGE	CONNECTIVITY	POTENTIAL
PRIORITY MARKETS U.K. Germany France Spain Italy Holland Belgium	HIGH	HIGH	MEDIUM-HIGH (They are mature markets with a large number of tourists)
SECONDARY MARKETS Russian Switzerland Austria Ireland Sweden Denmark Norway Finland Hungary Czech Republic Poland Iceland	HIGH	MEDIUM	HIGH
EMERGING MARKETS WITH OPPORTUNITIES USA Israel Africa Baltic Countries Ukraine CIS Markets (Azerbaijan, Kazakhstan, Uzbekistan, Georgia) Western Asia (Saudi Arabia, United Emirates) India	LOW	LOW	HIGH

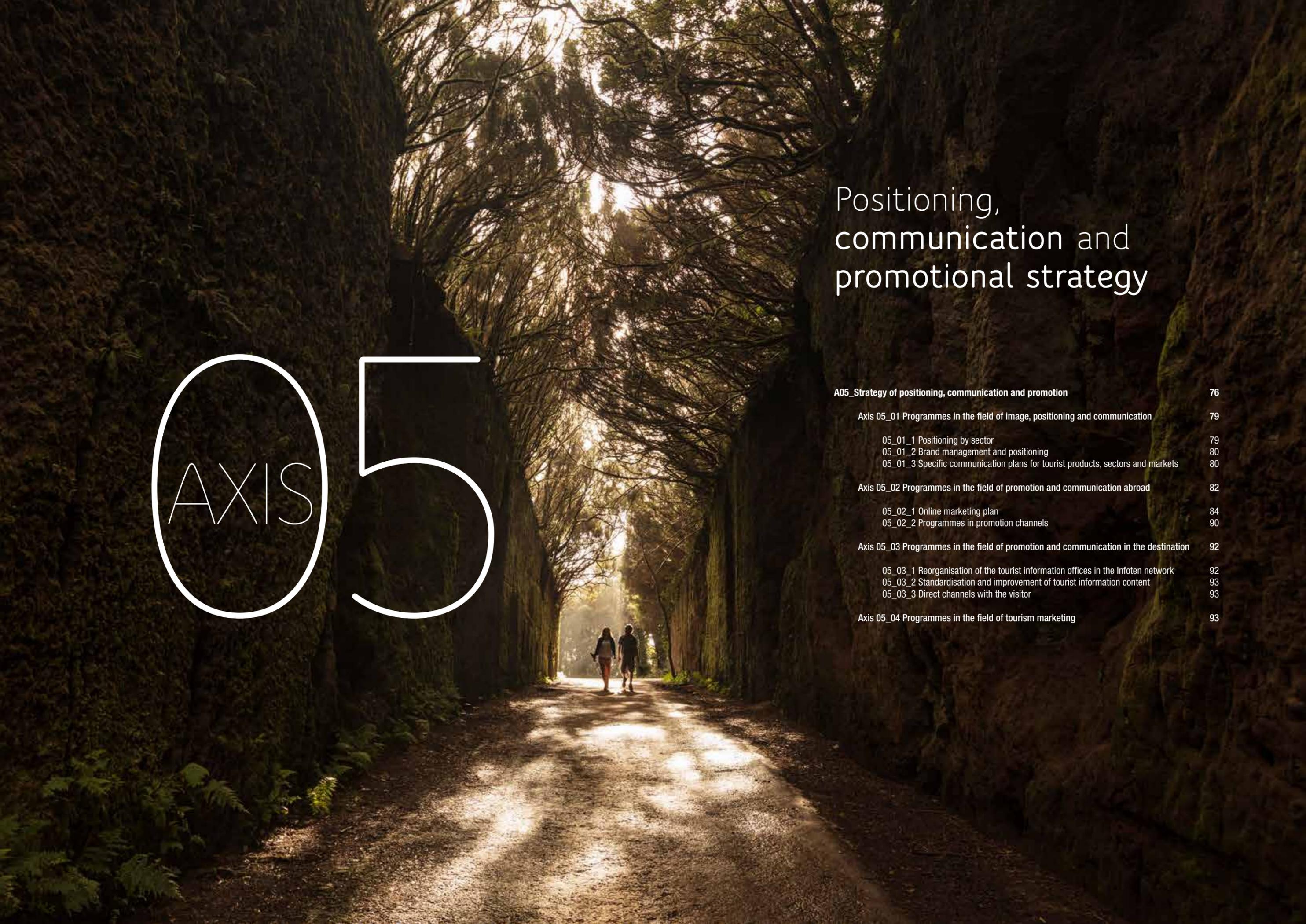
Priority Markets

Main Activities	Priority Markets										Secondary Markets										Emerging Markets with opportunities							
	U.K.	Germany	France	Spain	Italy	Holland	Belgium	Russia	Switzer-land	Austria	Ireland	Sweden	Denmark	Norway	Finland	Hungary	Czech Republic	Poland	Iceland	USA	Israel	Africa	Brazil States	OS	Middle East	Ukraine	India	
Climate/coast/beach	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Hiking	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Road cycling and MTB	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Golf	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Gastronomy	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Surf/body board	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Windsurf/kitesurf	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Diving	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Culture: Museums, concerts, exhibition	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Culture: Traditional/Folklore events	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Culture: Heritage tourism	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Culture: Cultural events	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Whalewatching	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Theme Parks	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Excursions /Adits	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major



Main Activities	Priority Markets										Secondary Markets										Emerging Markets with opportunities						
	U.K.	Germany	France	Spain	Italy	Holland	Belgium	Russia	Switzer-land	Austria	Ireland	Sweden	Denmark	Norway	Finland	Hungary	Czech Republic	Poland	Iceland	USA	Israel	Africa	Brazil States	OS	Middle East	Ukraine	India
Paragliding	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Astronautism	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Kayak/standup	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Sailing/sport fishing	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
MICE /CB travel	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Bird Watching	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Medical tourism	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Health tourism	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Weddings, Honeymoons, Romantic breaks	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Rural tourism	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Climbing	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Language tourism	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Shopping	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Family tourism	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Luxury/Premium brand	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major
Senior Citizen	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major	Major





AXIS 5

Positioning, communication and promotional strategy

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It is necessary to develop an Island Tourism Marketing Strategy that integrates and contributes coherence to the strategies and plans of communication, promotion and tourism marketing in Tenerife. This will avoid unrelated actions in this area that have an impact on the poor management of tourist positioning and the atomized tourist image of Tenerife.

Once the tourism communication, promotion and marketing plans of the island have been developed, they will be segmented for the different markets of origin and priority tourism products, adapting the communication and promotion for each one of them. To this end, a communication strategy about Tenerife will be developed that responds to the main requirements of both positioning strategy in particular, as well as that of tourist products, brands and the market of origin, from a general point of view. For each case, the content of the communication will be identified and will be reflected in the Island Tourism Marketing Strategy.

In the same way, specific communication and promotion plans will be developed for each medium or communication and promotion support, drawing up a Media Plan segmented for the strategic period, and specifically in each annual plan.

Lastly, it is necessary to promote the integration process with the tourism strategy of Promotur, of the Government of the Canary Islands. Specifically, in the planning of marketing, promotion and communication actions, both on and offline, with the objective of taking advantage of strategic synergies and maximizing the resources invested in them.

Axis 05_01

Programmes in the field of image, positioning and communication

05_01_01

Segmented positioning

In relation to the main selling points of the tourist destination identified, i.e., climate, nature, safety, friendliness and proximity, it is necessary to give priority to the first two, *the climate and nature*, as they are really differentiating points that bring outstanding benefits.

On the other hand, diversity is incorporated as a strategic argument for the positioning of the destination, which is posed as an attribute related to the offer of activities and their value, as well as a differentiating argument in the communication strategy of the destination. It is considered necessary to make this diversity tangible by relying on the most important motivations of the different groups of tourists.

A point to be communicated, both abroad and when already in the destination: "Go to Tenerife for the weather, but once there, discover the diversity".

In relation to the climate, it must present in the entire communication strategy of the destination, regardless of the content in question, so that this argument stands out as the main message. In any case, as has been indicated, the communication must focus on the sale of specific motivations for each of the identified targets, according to the target segmentation strategy. Nor should we overlook the leading position of Tenerife as a tourist destination in its closest environment, the Canary Islands. This is an argument to be highlighted in the positioning strategy.

As far as safety, friendliness and proximity are concerned, they are merely aesthetic attributes that describe more personal perceptions rather than those of the destination itself, so they will be present in communication, but they do not have to be the central priority.

In the case of safety, although it is an important element in the current global situation, in order to be able to scale it up as the main argument, we must work in depth for it to be perceived in this way. In relation to this, it is necessary to create a working group on island security that integrates the competent authorities, with the objective of reinforcing the perception of this attribute of the island. This line of work has already been pointed out in *A1__STRATEGY IN THE AREA OF COORDINATED MANAGEMENT OF THE TOURIST DESTINATION / GOVERNANCE, in the line of work 01_01_2> Design of action projects that, by their nature, require teamwork in various management areas, such as the Integral Plan of Tourist Safety.*

This attribute is also reinforced by a permanent complaints service to report illegal activities, environmental offences and other infractions. This service will be accompanied by a local awareness campaign on the importance of tourism and the need to take care of the destination, collected in Axis_10, in the line of work *10_03_3> Involvement of Tenerife society in initiatives to improve tourist activity*

05_01_02

Branding and positioning management

The tourism sector has to work on the current strategy of positioning the destination based on the five main attributes of the tourist destination: Climate, Nature, Friendliness, Safety and Proximity. This task must be assumed and shared in order to build a clear vision of the destination. In this line, the following actions will be addressed:

- **Design a training and advice strategy aimed at the trade and the local sector on the management of tourist positioning.** For this, it is necessary to create digital material that explains the values that identify the island and are part of the positioning.

- A storytelling in 2020 (Source: Statistician). Attractive, novel, inspiring and innovative content to the brand 'Tenerife 100% life'. This will facilitate the management of the destination's brand image and its use by internal and external tourism agents.

- **Training directed at different groups of agents,** such as tourist information workers, municipal tourism technicians and also the local population. This is to align sales and promotion strategies in different media (social networks and digital channels) with the destination's positioning and the brand 'Tenerife 100% life'.

05_01_03

Communication plans specific to tourism products, sectors and markets

The differentiation of Tenerife as a tourist destination will be accompanied by the promotional impulse of specialized market sectors in conjunction with the main attributes of the destination: *Climate, Nature, Friendliness, Safety and Proximity.*

- **Promote the updating and growth of specialised brands** ('Tenerife Select', 'Tenerife No Limits', 'Tenerife Golf', 'Tenerife Film Commission' and 'Tenerife Convention Bureau') as important axes for the implementation of the new desired positioning: a specialized offer aimed at specific sectors of each market.

- **Adapt the communication strategy to the characteristics of different target audiences or sectors identified** in the marketing strategy, identifying the channels and supports most suitable to reach each one of them.





Axis 05_02

Programmes in the field of promotion and communication abroad

The experts' views on future trends will undoubtedly mark the lines of work that Tenerife should focus on in the coming years.

What are these trends according to the experts?

It is estimated that by 2020:

- For the first time in history, millennials will account for more than half of the US workforce.
- There will be more than 75 million devices connected to the Internet (Source: TechCo).
- The United States will spend 79 billion dollars on SEO campaigns (Source: Statista)
- 30% of Internet searches will be done without a screen. Example: voice assistants like Siri, Cortana, et cetera (Source: Mediapos).

- The number of smart speakers will reach 21.4 million only in the United States. Example: Alexa, Google Home, among others (Source: Activate).
- More than 75% of Internet traffic will be on mobile devices (Source: Cisco).
- There will be 2.5 trillion smartphones in use. This is more than the total number of Internet users in 2010.
- 91% of employees believe that their company, if it continues with its current strategy, will not be competitive in 2020 (Source: Infomentum).
- Revenue will reach the figure of 21.4 million for smart speakers only in the States and for virtual and augmented reality technology the figure will reach 15 billion (Source: Digi-capital).
- There will be more than 2 billion connected devices in homes and more than 90% of cars will also be connected to the Internet (Source: CMO.com).
- The use of e-mail will increase to more than 3 billion people. This is 300 million more than in 2017 (Source: Radicati).
- International and domestic e-commerce sales will reach 69 billion pounds sterling (Source: Statistician).
- The market for applications for self-learning will reach 13 billion dollars (Source: Ironpaper).
- Cross-border B2C e-commerce will reach sales of almost \$ 1 trillion (Source: UNCTAD).

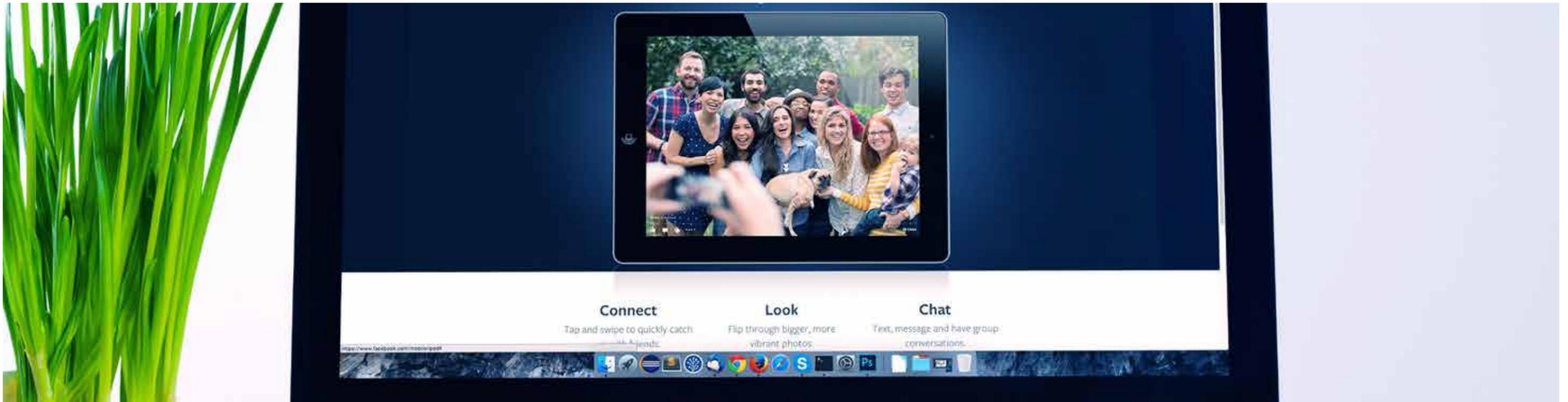
- The transaction value of robo-advisor services (automated financial advisors providing an online wealth management service) per user in the United Kingdom is expected to grow from approximately \$ 13,000 in 2015 to \$ 27,000.
- The artificial intelligence market will grow very rapidly, by more than 5 billion dollars (Source: Markets and Markets).
- There will be almost half a million more individuals behind social networking (Source: Statista).
- Spending on social media advertising will exceed the total expenditure on print ads (Source: CNBC).

If we try to influence or capture the attention of a target audience that has changed its way of thinking by using old methods, it will not work. A tourist destination needs to continually adapt to the requirements of its customers and know their preferences, tastes and needs better in order to offer adapted products.

Tourists demand relevant digital content with which they can interact. Tenerife needs to have technological solutions and new profiles that allow the creation of content on multiple platforms. The people who visit us expect content on mobile devices that is increasingly detailed, giving priority to audio-visual content and a certain degree of interaction. The challenge of digital transformation is to establish a relationship plan with our guests, generating personalized content throughout all stages of the trip.

Therefore, we must adapt to the digital transformation and take on new communication strategies, where tools such as virtual reality, experiential images, content marketing and the enhancement of the official website of the destination, as well as the strategy in so-

cial networks and the management of a CRM strategy, will become the main axis. It is a matter of prioritizing the digital while gradually abandoning paper as a promotional element.



05_02_01

Online Marketing Plan

The online contracting of trips to Tenerife has not ceased to grow in the last decade, leaving behind other more conventional methods. In 2016, eighty-five percent of those who visited the island organized online the different services of their trip, with seventy percent of visitors buying their holiday by this method. (Tenerife Tourist Board: Tourist Situation Report).

Currently, online marketing actions are done in a disjointed way, their content being treated individually. For this reason, it is necessary to implement a specific integrated plan in this area that derives from the priority objectives of communication and promotion of the destination and identifies the following elements:

- Specific objectives by market.
- Target audience.
- Online positioning strategy.
- Search engine positioning strategy (SEO-SEM).
- Presence strategy on social networks.
- Mobile marketing strategy.
- Management and analysis of results obtained.

The island tourist sector must be fully prepared and trained to compete in the digital economy. That is why it is necessary to make a strong push for the implementation of a training programme in the field of online marketing, which goes beyond mere presence in new digital channels.

Tenerife as a tourist destination and the entire tourist sector must be prepared to anticipate the movements of demand.

WEBTENERIFE.COM the destination's web

Give impulse to the visibility of webtenerife.com on search engines according to objectives of organic positioning (SEO) and management of sponsored links in search engines (SEM) according to the following parameters:

- The need to **share with the tourism sector the SEO-SEM strategy** to avoid internal competition and to point everything in the same direction.
- An SEO strategy

- For the SEO strategy: invest in the development of **attractive content** capable of capturing the attention and implementation of an Inbound Marketing strategy.
- In the SEM strategy: continue to insist on **new markets** and use the strategy for branding campaigns.
- Implementation of a **content generation strategy**. Its creation by motivations and collectives will contribute to the development of Branded Content and media content (PR); Inbound Marketing (leads) and Viralization (social networks).
- Beyond search engines, a SEM positioning **through programmatic advertising is needed**.
- Integration of the **online channels** within the Communication Plan.
- Continue promoting **webtenerife.com as the official website of the destination**, unifying it with other official tourist websites to avoid duplicities.
- **Permanent technical optimization of webtenerife.com** adapting it to the new standards of online communication. Raise alternatives to changing the destination URL (webtenerife) to another more effective one.

- **Implementation of improvements in the content and images of the web**, aligning them with the objectives of products and priority tourist sectors. The translation of the web into the languages of the markets considered strategic is a priority and of vital importance.
- **Incorporate a commercial section for the sale of services on the website of the destination**. A marketing that gives visibility to sales initiatives led by local entrepreneurs and that are aligned with the positioning of the tourist destination.
- **Personalization of user experience and omnicanality.**
- **Management of reference web sites.**
- **Unification** of tourist websites and online media.
- **Content strategy and translation.**
- **Online marketing** of tourism product.
- **Incorporate the trade** into the commercialization of activities.

Mobile marketing

It should be geared to:

- Encouraging mobile marketing actions: **definition of strategy, tools to use and operational database capture.**
- Proposing **campaigns directed exclusively at mobile support.**
- Developing **applications about the destination that are 100% functional, simple and promoted by the areas responsible.** On the one hand, it must be an easy-to-use tool that gives the tourist value and, on the other hand, it must be disseminated and promoted in the destination's information network, thus helping to simplify the diversity of promotional material which is offered to tourists when they arrive. In addition, this will foster the image of a destination that focuses on sustainability and the saving of paper resources.
- Using **virtual reality** and experiential images

Plan to be present on social networks

Its main objectives are:

- **Generate traffic to the destination's web: www.webtenerife.com**
- To **position the Tenerife Tourist Board** as the reference point of the sector.
- **Increase the number of contacts and improvement of databases** for future actions included in the CRM strategy of the destination.
- **Improve customer service.**
- **Strengthen the reputation of the brand** and destination through branding campaigns.
- **Facilitate a dialogue platform with those who visit us** to increase interaction.
- **Highlight the positioning of the destination** with special emphasis on the main selling points: climate, nature, diversity, safety, friendliness and proximity.
- **Search and identify prescribers.**
- **Build loyalty**
- **Progress in SEO positioning.**

As a main objective within the strategy of social networks of the destination, the need to carry out promotional actions through influencers and by topics that generate demand, since when there is no brand presence the effectiveness of the influencer is much higher. So:



■ **Identification of influencers as a strategic sector:** the new strategic sales representatives to be incorporated into Tenerife's external promotion.

The updating of the destination's presence strategy on social networks has to take into account the recommendations of the audit carried out recently to identify areas of improvement that help to reinforce the presence of Tenerife in these communication channels. These recommendations are summarized in the following:

■ Adjust the strategy in social networks, not only by means of "push" messages, but also the **generation of alternative channels in order to interact with the audience** with the main objective of encouraging the creation of a community of followers of the destination.

■ **Create a system that determines a real return on the investment that is being made in social networks by the Tenerife Tourist Board.** For this, it is necessary to have *machine learning* methodologies and to implement a monitored listening system to identify what is said about Tenerife in the main markets of origin.

■ With these two elements, it would be necessary to **encourage the implementation of a mobile marketing strategy for the destination.**

■ **Anchor a good *land page* adapted to the aforementioned strategy.** This would not be completed without an active follow-up, via email or social networks, of the different contents that are being developed, both by the Tenerife Tourist Board and the people who visit us.

■ The task of renewing the social media strategy involves a process of selection and re-signification of internal and external resources at the level of business management by the Tenerife Tourist Board, **whose main objective is to reinforce the presence of the Tenerife brand in the digital field.**

Managing a CRM Plan

Implement a strategic tool that facilitates the direct contact of the tourist destination Tenerife with its clients and which strengthens relationships and allows us to obtain key information. This contact can lead to the achievement of a competitive advantage and growth that will involve loyalty from the largest possible number of customers.

To do this it will be necessary to launch a marketing plan aimed at tourists as a fundamental loyalty tool taking into account the three key moments of the trip:

- Before the trip: web and social networks.
- During the trip: actions on mobile devices.
- Post trip: social networks and e-mail marketing actions.

The implementation of this Relationship Marketing Plan will include:

■ Management and collection of **databases** by means of direct registration through the web.

■ **Email marketing actions.**

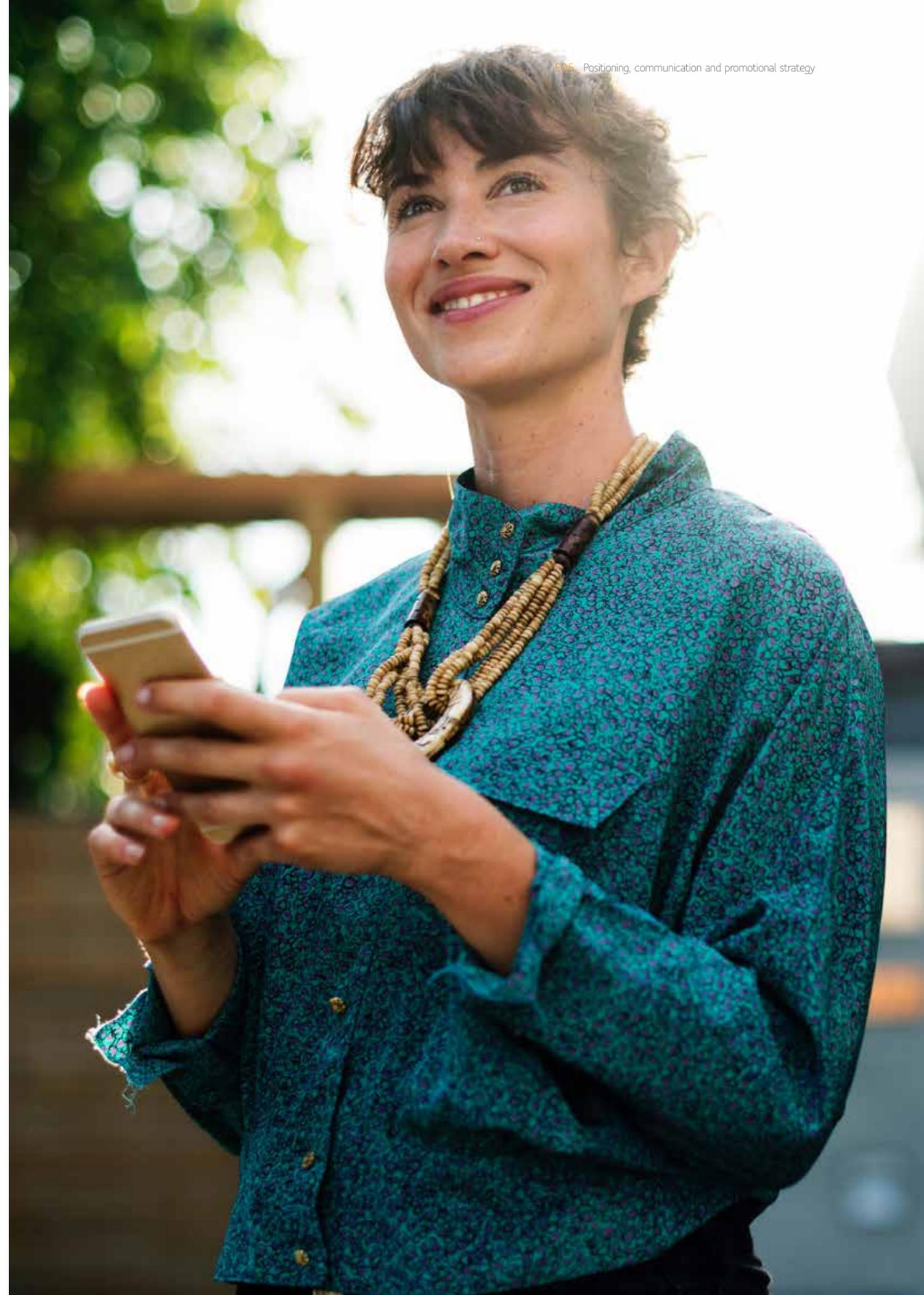
■ **Mobile marketing actions.**

■ Incorporation of **CRM (e-mailing)** actions into the generic Communication Plan of the destination, which is currently structured with reinforcement campaigns in specific periods such as Carnival, Easter, summer, winter and Christmas. In addition to these seasonal events we will carry out e-mailing actions in other periods of the year with the objective of communicating outstanding events, both cultural and sporting, that have the potential to attract tourists to the destination.

■ **A CRM programme segmented** for specialised brands of the Tenerife Tourist Board, with the mailing of specific content aligned with the positioning of each brand and market.

■ Management of instruments such as capturing and updating new databases (online and offline) and **post-mailing efficiency analysis.**

■ Enhance the B2B CRM strategy directly with the **trade.** Boost B2C through Inbound Marketing.



¹ Aprendizaje automático (parte de inteligencia artificial) que permite desarrollar técnicas cuyo objetivo es aprender de la red. Con estas técnicas se consigue analizar los comportamientos de los turistas a través de la información suministrada.



05_02_02

Programmes in promotion channels

Differentiation and specialization of promotional content by product / sectors and strategic markets

- Design and implementation of special promotional plans according to the communication plans.
- Specialized promotions of tourism products according to established priorities.
- Adequate content, supports and promotional channels.
- Technological adaptation of promotional material.

Organisation and participation in events and actions of tourist interest

- Celebration of major events of a tourist nature on the island, such as travel agents' congresses, awards ceremonies of different associations, press visits, and so on.

- Collaboration with sports and cultural events with national and international media impact.
- Collaboration with tourist events organised by tour operators.
- Promotions in television and film productions of great promotional impact.
- Focus on the promotion of major events held in Tenerife, linked to product sectors and tourism.
- Monitoring of impacts in order to be able to establish corrective or improvement measures.

Direct support for the industry in external promotional actions

This includes: programmes about the destination (famtrips), relationship with the media, meetings with the tourism industry, workshops and roadshows and online advertising campaigns with the *trade*.

- Public relations actions with the media sector.
- Direct contact with intermediaries (tour operators and travel agents).
- Campaign actions with tourist and non-tourist companies.

Training and knowledge of the diversity of the Tenerife offer

- Promotion of channels and information media for training the tourism industry.
- Improve the knowledge of travel agents from markets of origin with famtrips.
- Information days and campaigns on tourism issues.
- Promote awareness of the destination under the brand 'Tenerife 100% life', which unites the elements that make Tenerife a "unique and differentiated" destination: its climate and human warmth, its natural diversity of landscapes and options, safety, and the care and dedication of its professionals. In short, what constitutes the destination in its totality towards the people who visit us, giving them unforgettable experiences.

Collaboration between public entities in promotional actions

- Sponsorship.
- Big Events.
- Advertising campaigns.
- *Famtrips*.
- *Press Trips*.
- Presentation at source.
- Participation in events.
- Professional days.

Co-marketing actions

- Actions aimed at wholesalers with high penetration in the markets or in certain sectors. It is a matter of betting on a change of image and positioning for Tenerife, thus contributing to the specialized promotion of products and fragments of markets.

Presence in markets of origin through representation and communication agencies

Currently, Tenerife has presence through representation offices in the UK, Spain, Germany, France and Russia.

Axis 05_03

Programmes in the field of promotion and communication in Tenerife

05_03_01

Reorganisation of the Infoten Tourist Information Office network

Since 2005 the Tenerife Tourist Board has coordinated the Infoten Network, which is made up of the forty tourist information offices present on the island, which are largely managed by town halls and coordinated by the Tourist Board.

This network is a strategic tool so that whoever visits us can get to know the versatility of the destination and can find out how to get around, thus achieving a better distribution of the expenses incurred by tourists when moving between the municipalities on the island. It is also an example of inter-administrative collaboration that requires a working analysis, on the one hand, to determine correct decision-making regarding future needs, and on the other hand, the improvement of user experience and the work of the those giving the information, as well as the possibilities to modernize these areas of vital importance during the tourists' stay, improve mobility between municipalities and tourism resources, and get the tourists' loyalty.

The forty tourist information offices that currently constitute the INFOTEN Network served more than 900,000 visitors in 20016. With the future incorporation of four offices in the Teide National Park, this tourism resource aspires to become a marketer and booster of the activities of the destination, which entails implementing a new information office model.

This line of action aims at building the new information office model by modernizing the operation of the INFOTEN Network in the following aspects:

- **To adapt the offices to the characteristics of the tourist activity** of the Island.
- Modernization of the **aesthetic image** and the equipment in the offices, aligned with the positioning of Tenerife as a tourist destination.
- Optimize the **system for listening to and collecting** visitor information.

- Improve user experience.
- Standardise **the contents of information** offered in the different offices.
- Incorporate, in those offices that require it, the **use of ICT** to meet the increasing digital needs of visitors.
- Implement **improvements in the technological systems** of the information network.
- Add **marketing systems of tourism services** linked to suppliers.
- Promote clear sign-posting for the Tourist Information Offices, as well as the office itself, through differentiated and exclusive elements.
- Implement a **performance assessment system**.
- Update the **specific training programme** for the qualification of tourist information workers.
- Update **the regulatory agreement of the INFOTEN Network**.

05_03_02

Standardization and improvement of the contents of tourist information

The coordinated management of the positioning of Tenerife and its image is linked to the standardization of the contents found in the multiple channels of information made available to tourism, as already mentioned in Axis 05_01.

This implies:

- The creation of a **programme to advise local entities on events and activities** with potential for tourism communication, as well as ways to adapt them to tourist markets: languages, promotional formulas, suitable schedules, cultural peculiarities, and so on.
- The promotion of **contact-collaboration between local tourism business people and the operators in destination**.
- The increase in **information content of a practical nature** of greater interest to the visitor, in addition to the development of other specific contents for the INFOTEN Network, and always within the framework of the strategy for sustainability.
- The development of **advisory and training programmes aimed at promoters of the destination**, those who are most in contact with visitors when they arrive on the island: receptionists, workers at Tourist Information Offices, taxi drivers or transfer drivers, as well as guides from tour operators. This will favour the alignment of the information offered with the positioning of Tenerife.
- The implementation of a **monitoring procedure for the periodic updating of the contents and supports of informative material**.
- Give impulse **to the use of the INFOTEN extranet**, positioning it as the main tool for tourist information among professionals.
- The redefinition of the **classification system and formulas the display of informative material**.

05_03_03

Direct channels with the visitor

- Take advantage of the disappearance of roaming tariffs to boost and consolidate the **communication platform** in destination.
- Development of an own **digital platform** (application / web format) to establish direct and practical communication with tourists in destination.
- Technological innovation in the development of **new means of communication** of the destination.
- Carrying out a specific **promotion programme in destination for repeat customers**: link to CRM.
- Development of an **official application of the destination**.

Axis 05_04

Programmes in the field of tourist marketing

- Support for the **creation of cooperatives or centres for the purchase of activities and products** in order to counteract the difficulties of a small business community with few resources to reach the visitor individually.
- **Training entrepreneurs** in the field of tourism marketing.
- Incorporation of a **sale of services commercial section** on the web of the destination.
- Creation of **technological formulas, such as touch screens, for the sale of tourist activities** in Tourist Information Offices.
- **Sale of experiences and activities in the destination through online supports** of application / web format.

AXIS 06

Innovation and competitiveness strategy

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According to the latest report on the *State of Innovation in Spain*, prepared by Esadecreapolis (2016), the reduction of costs that has been the main focus of innovation efforts of tourism companies in the last eight years, is now bottom of the list of priorities. It is now innovating to differentiate itself and generate new business models.

In recent years, technology has been the area that has attracted the greatest investment in the tourism sector. Although it still accounts for a quarter of the investments of all companies (19.1%), it can be observed how the creation of new products far surpassed it (23.6%) in 2016. After both of these come marketing and sales (16.5%) and reorganization and new functions (11.1%). The absolute leadership of technological investments has given way to the search for new products as the spearhead of tourism companies in their quest for new clientele.

On the other hand, according to the *"Innovation Challenges in the Tourism Sector"* survey carried out by the Canary Island Tourism Innovation Factory (FIT) and the Tenerife Tourist Board in 2016, the tourism entrepreneurs on the island believe that the challenges of tourism innovation are mainly related to:

- Innovation in the design of new infrastructures.
- Entrepreneurship skills.
- Innovation in the renovation of hotels.
- Greater differentiation as a competitive strategy.
- Increased commitment to sustainability.
- Use of cleaner and renewable technologies.

The areas where there is greater intention to carry out investments for improvement are: the creation of new products and / or services, technological advancement, team training, commercialization, as well as communication and marketing.

The survey places the opportunities to develop public-private tourism innovation projects mainly around the following themes:

- Improvement of waste management.
- Energy efficiency.
- Renewable energy.
- Sustainable mobility.

No one today denies the relationship between innovative business effort and competitiveness. If we want to improve the current levels of competitiveness in the tourism sector, improve the quality of employment and reduce pressures on the environment, we must strive for the tourism ecosystem (people, companies, entrepreneurs and public bodies) to understand innovation as a lever and as a tool to convert the advances and developments of science into business advances and into improvement of the quality of life.

Tourist innovation is understood as any change based on knowledge that is promoted in organisations to solve problems or needs of groups (interest groups, visitors or clientele). This generates value and must always have a social, environmental or economic return, after all, it is the people who make possible the innovation of tourism, those who through their ideas and leadership achieve results.

Tenerife is a multi-tourist destination with sectors ranging from those who travel independently, almost without interacting with the territory, to those who demand personalised travel with the interaction of multiple agents. The island itself is a laboratory for the innovation of new products and services, new business models and the application of technological tools that pursue this goal. This makes it a territory with enormous possibilities in which business organisations can

intervene to develop and later see their innovative effort give monetary returns.

Having overcome this phase of instability in some countries linked to tourism, we are returning to a highly competitive stage with emerging and consolidated destinations that will have made very strong investments and will be relaunched with competitive prices, where intermediation will once again focus on a simple matter of greater profitability. The world will shorten its distances, with greater mobility, with aeroplanes and infrastructures of greater capacity and quality. The tourist will be the main source of innovation and many business models will have to be reinvented given the current intense changes in purchasing and consumption habits.

It is crucial what is done until then in the preparation phase of the destination (facilities, diversity and innovation) and customer loyalty. It will be difficult to seduce tourists with photographs and videos that show more our aspirations as a destination than what we really are. New technologies and social networks will be responsible for showing us as we are, as well as what those who visit us think of our products and services.

For all this, the main objective is to continue working on sensitising the sector to the value of innovation as an engine of economic development and in the promotion of a culture aimed at valuing people, their talent, knowledge, creativity and collaboration as critical factors. The aim is to foster an innovative scenario in companies in the tourism sector, with a focus based on the needs of the clients who visit the island and to generate ecosystems conducive to the development of value added products and services. Specifically:

- **Promote greater social involvement in tourism and foster an innovative and entrepreneurial spirit**, especially in the development of new products-services and in their marketing, distribution and loyalty.
- **Invest in the training of people in areas of creativity, innovation and adaptation of tourism business models to the present day**. There is a lot of innovation in improving these models in companies: innovation in products, in management and above all in marketing aligned with the destination's strategy. But it is also necessary to establish and facilitate tools for differentiation and specialization that make Tenerife a more diverse and "sustainable" place for tourism.
- **Provide tools to improve product development and generate innovative and differentiated tourism activities**, with incessant adaptations to tourist demand that allow the successful promotion of the destination.

Axis 06_01

Programmes in the field of innovation

According to the Intelligent Specialisation Strategy of the Canaries 2014-2020, tourism has the ability to drive innovation, internationalisation and competitiveness in other sectors such as water, energy, industry, ICT, agri-food, health, culture and education, among other areas. In this way the diversification of the Canary economy is favoured and a strategic axis, not only vertical, but also transverse towards very diverse sectors will be strengthened by tourist demand for innovative products and services that reinforce its competitiveness.

It is very important to boost the renovation and modernization of housing estates, tourist centres and facilities, as well as those of products and services by diversifying their offer and specialising in client-centered uses, according to a sustainable, quality model. Tourism has a strategic importance and public interest that can not be limited to initiatives that are voluntarily driven from the private sector.

All this process must be led from a centre which is specialised in tourist innovation such as the FIT Canarias, which in this new period has to aspire to become the national and international benchmark for boosting innovation in tourism companies. This organisation is a tool launched in 2014 by the Tenerife Tourist Board together with the Science and Technology Park of Tenerife, Ashotel, the Chamber of Commerce of Santa Cruz and Adeje Town Hall, as a centre for the transfer of knowledge between business groups, research centres and businesses exclusively dedicated to tourism. Its constitution is based on the idea of working together to improve the competitiveness of the sector.

The lines of action that arise in this axis are addressed in the following areas:

- Co-ordinated work between administrations.
- Knowledge-based tourism management and transfer of innovations to the sector.
- Promotion of innovative culture and competitive intelligence through the use of data and applications that contribute to improve the experience of those who visit the destination.
- Promotion of progress and introduction of new technologies and tools aimed at improving sustainability.
- Advances oriented to the tourist public, through the differentiation of companies and the destination.
- Actions aimed at entrepreneurship and intrapreneurship.
- Promotion of projects under the umbrella of smart tourist destinations.





06_01_01

Institutional coordination in tourist innovation

Establish a permanent dialogue with agents of the sector to meet the needs and priorities of efforts in innovation. This entails:

- Analysing the **priorities and challenges of innovation** in the tourism sector through a biannual survey.
- The creation of the **Working Group on Tourism Innovation in RED**, in order to reach consensus on the innovative lines of action for tourism at the insular level.

06_01_02

Innovation for tourism entrepreneurship

Promote and support the entrepreneurship and intrapreneurship of activities, as well as the generation of new tourism companies that strengthen both the value chain of the destination and the development of a competitive tourism offer. In particular, this will be in the development of new products and services, and in marketing and distribution capacity. With this in mind, the following measures have been taken:

- Develop an ideas bank and possible improvements as a **citizen participation environment**.
- Surveillance of future **technological trends**.
- Dissemination of successful cases of knowledge transfer: Demonstration actions of trends, technologies and research.
- Development of acceleration programmes for *Fast Track* Tourism projects.
- Promotion of tourism investment programmes for the local entrepreneur, such as '*TFE Invierte Turismo*' or '*Mentor Day Tourism*'.
- Intrapreneurs: a competition of ideas and projects for tourism business personnel.

06_01_03

Improving skills in creativity, innovation and adaptation of business models

Invest in training in areas of creativity, innovation and adaptation of business models to current trends in product innovation, management and marketing, always aligned with the target strategy. This implies:

- The development of a **differentiated training catalogue in Tourism Creativity and Innovation** for the creation of value added products and services.
- Contribution to the generation of **new business models** by activity sectors, ie:
 - Training in Management of Intelligent Tourist Destinations.
 - Training in Business Intelligence.
 - Training in Gastronomic Innovation.

06_01_04

Public-Private Laboratories and Innovation Projects

The idea is to place Tenerife in the forefront of tourism innovation, under the umbrella of 'Tenerife Smart Island' / 'Smart Tourist Destination', with:

- Smart Tourist Destination pilot projects.
- An office of European Projects.
- A project for the Modernization of Tourist Information Offices.
- Eco Innovation Projects: Leveraging actions to improve the sustainability of the tourism industry, transforming it into a low energy resource sector, which improves the competitiveness of companies and the quality of life on the Island. The new business opportunities associated with the Green Economy, stimulating projects that contribute to attaining this objective are:
 - ICT Disruptive Technology Lab: Applications of Augmented Reality.
 - Sustainable Mobility Lab.
 - Online marketing Lab.
 - Food & Robotics Lab.
 - Eco-innovation Lab.

Strategy in the field of tourism intelligence



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Axis 07_01

Programmes in the field of knowledge and research

Tenerife has its own intelligence system that has been essential for the competitiveness of the destination and the decision-making of its tourism managers, contributing to a new model for island tourism.

The transversal nature of tourism activity also requires that research integrates all those fields of knowledge that are key to the direct or indirect management of tourism on the Island. That is why this new stage will be responsible for providing the knowledge necessary for an adequate development of the programmes contained in this strategy, thus being a line of work at the service of the development of other axes and objectives.

Tenerife's tourism intelligence system must be integral and facilitate correct decision-making in policy planning and tourism development throughout its chain, optimizing information and knowledge, and allowing them to be located with greater utility in each case.

It is not so much about Tourist Intelligence itself, but about contributing through knowledge to the creation of a **tourist system managed with intelligence** that aspires, on the one hand, to revalue the destination and increase its competitiveness, taking advantage of natural and cultural attractions, process efficiency, sustainable development, interaction between tourism and the destination, as well as an improvement in the quality of life of the resident population. On the other, this tourist system must know how to use information intelligently, which is undoubtedly one of the great challenges of the new economy.

Intelligence

Comprehend variables and processes

Resolve problems

Develop abilities and skills

The in-depth knowledge of the people who visit Tenerife, whether current or potential; the understanding of the variables of their tourist behaviour, needs and motivations, allows the destination to manage actions in the many areas that make up the value chain of tourism.

The adaptation of infrastructures and services to their demands and needs, increasing the efficiency of communication and promotion in home markets, the capture of specific market sectors and the development of specialised tourism offers are some of the relevant strategic actions that help them to make their decisions by making use of this knowledge.





07_01_01

Strategic analysis of accommodation supply and analysis for its adaptation and renovation

In order to carry out an improvement in accommodation and ensure its adaptation to the development of tourist activities and market niches, it is necessary to undertake lines of research in the following areas:

- Specific analyses directed to the **orientation of the improvements and the renovation** of accommodation infrastructure.
- Investment performance studies in accommodation establishments.
- Implementation of an **observatory for renovation** between different areas of tourism, in cooperation with the University of La Laguna.
- Analysis of **new accommodation modalities** (holiday housing and others) in collaboration with the Department for Economic Development of the Tenerife Island Council.
- A study of the **key factors that affect the choice** of accommodation by the tourist.

07_01_02

Knowledge applied to the improvement and adaptation of tourist space. Specific diagnosis of island tourist zones

There are many places on the island that require specific attention to help solve problems that have been generated by the expansion of tourism development. To do this it is necessary to make a diagnosis that contemplates:

- The detection of specific problems in public and private areas of tourist centres and areas.
- Strategic knowledge for the development of tourism activities and services in specific areas.
- The indicators of results and profitability of the renovation of tourist areas and accommodation.
- The necessary information and data before undertaking a planning and improvement project.
- The definition of the main problems in specific tourist areas, particularly in nature areas.

07_01_03

Knowledge applied to the development of tourism products and activities

The development of tourism activities requires detailed information about the requirements of both the destination and its suppliers throughout its value chain, as well as the main needs of user demand for these activities. This requires two measures:

- Collaboration agreements to develop tools with providers of services in different sectors for the collection of information: museums and cultural offers; specific activities; etc.
- Use of secondary data sources from other parts to be incorporated into other areas of knowledge of the tourist activity, for example, in terms of mobility and roads.

07_01_04

Analysis and studies to improve and boost connectivity and mobility

The improvement of the connectivity is a tourist priority in Tenerife, being the entrance door that sustains the activity. In the same way, internal mobility allows tourism to contribute to the rest of the island economy. That is why knowledge in the fields of connectivity and internal mobility are priorities in the Tourism Intelligence Programme.

07_01_05

Research to contribute to the management of the positioning and the tourist image of Tenerife

Knowledge of the way in which the people who visit us perceive Tenerife as a whole, as well as the components of its tourist offer, not only allows the development of communication but also, and more relevant than this, is that it helps to understand the keys that underlie the process of choosing the destination made prior to a trip, as well as knowing the keys to tourist motivation and satisfaction. It is therefore necessary to:

- Incorporate **knowledge about tourist perception** of Tenerife in the markets of origin.
- Start active **listening projects on social networks**.

07_01_06

Socio-economic analysis of the tourism sector

Tourism is directly responsible for 25% of jobs in the economy of Tenerife. For this reason, employment in the tourism sector has become one of the priorities for research as a tool to support the employment promotion policy undertaken by the Tenerife Island Council. To integrate the different factors involved in the improvement and quality of tourism employment, this analysis should be expanded with:

- Research in the field of **training and employment needs** in the tourism sector in collaboration with the Employment Service, the University and Training Schools.
- Showing **business opportunities** in tourist areas.
- Studies to contribute to the **recognition of tourist professions**: analyse the perception of society about tourist professions as a starting point for their value to be recognised.

07_01_07

Digitalization of knowledge and digital knowledge

In accordance with the latest trends, it is a priority that the Island Tourist Intelligence system incorporates digital tools, both for information gathering and for knowledge transfer. For this it is necessary to:

- Improve **listening channels**.
- Carry out studies of **perception of the destination** from social networks.

07_01_08

Knowledge and management

It should be kept in mind that the intelligent use of information also requires being prepared to use knowledge in order to generate value and support decision making. This means:

- A didactic dissemination to the island tourist sector, both public and private, of tourist knowledge for its practical use in management and decision making.
- A series of workshops aimed at the tourism business sector on the practical use of information and tourist data. Smart tourist skills for the business sector.

07_01_09

Co-operation in Tourism Intelligence

The creation of an Island Tourist Knowledge Network, with the involvement of the University and other research bodies will strengthen the tourism system while fostering the acquisition of talent in material of knowledge.

07_01_10

Research to contribute to the sustainable management of Tenerife as a tourist destination

Specifically:

- Digital **study of tourist movement flows** applied to the improvement of sustainability (Beacons-mobile).
- Collaboration with research projects within the 'Intelligent Island' framework.

07_01_11

Strategic Planning

In relation to the new Strategy 2017-2020 / 2030, it is proposed to consolidate permanently the Working Groups created in the drawing up of this Strategy. It is also recommended that monitoring indicators be established to assess their performance and the achievement of their objectives. These will be achieved through the corresponding operational plans and be carried out after the completion of the overall strategic framework.





AXIS 8

Strategy in the area of sustainability, accessibility and equality

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Sustainable development at the territorial, sectoral or individual level is defined as the ability to make decisions at each level that meet the needs of the population, without compromising the needs of future generations. In current economic development models, the income or economic value of the activities carried out exclude - by the very definition of market economy and collective action - numerous social benefits and costs, also called externalities, which make the redistribution of income difficult and reduce the levels of welfare for the population, whether today or in the future.

The difficulties in integrating these externalities into private and collective decisions are generating significant social and environmental pressures on our economic systems. These pressures also translate into considerable efficiency losses in current economies and, possibly, economic opportunities in the future.

The new Sustainable Development Agenda adopted by the UN in 2015 and in force since 1 January 2016, highlights that these social and environmental pressures have taken on such a dimension that it is essential to integrate the objectives of sustainability into all the activities carried out by each and every one of the socio-economic agents at all territorial levels. In short, not internalizing the benefits and social costs (including environmental) causes the economy to lose opportunities for expansion, thereby reducing its ability to generate income and welfare for the population today.

Paradigm shift

In this context of the new United Nations Sustainable Development Agenda a new approach arises: instead of asking what tourism can do for sustainability in Tenerife, we can ask **what sustainability can do for tourism at island level**. This is a relevant reflection in the Tenerife Tourism Strategy, given that sustainability, as an inspiring axis of tourism development, implies identifying the opportunities offered by a more sustainable tourism destination, both currently and in the future.

Alternatively, the question can be formulated as what are the risks for tourism development if it continues on a path of unsustainable development. The answer is complex and only speculative, as there are no island-level indicators of sustainability currently helping to identify such risks.

The tourism industry puts considerable social and environmental pressures on the island development model, so it is tempting to focus on a set of ad hoc, reactive measures to the tourism development strategy to try to internalize some of the costs and social benefits. However, individual policies and efforts over the last few years have proved to be inadequate and, above all, ineffective. The necessary willingness and contradictions faced by economic agents in their decision-making, relegate to local administrations the function of preserving the social, cultural and environmental heritage of the Island, trying to constantly compensate for the negative impacts of development or making new investments in infrastructure that internalize these impacts.

Identifying risks and priorities

Perhaps this is one of the priority areas of action in the Tenerife tourism strategy: to determine the risks and priorities of the economic, social and environmental impacts of tourism at island level through a system of indicators.

It can also be argued that in the current context of limited public spending there are difficulties in redirecting the money from economic development to the correction of social and environmental impacts. It could be more worrying to consider scenarios of cost increase in the availability of key natural resources for tourist activity: energy, water and land, to name a few, or an increase in the cost of social opportunity of the corrective impact measures in the field of public policies.

It is reasonable to reflect, therefore, on the opportunities of the present moment to integrate in the island tourist model some of the seventeen sustainability objectives proposed in the Agenda, identifying some priority areas that could boost tourist activity and increase the competitiveness of the destination, starting with the integration or internalization of the social costs and benefits of the industry.

In short, the strategy for sustainability, accessibility and equality in tourism means:

- 1. Increase efficiency in the transformation and use of natural resources:** this could not only reduce production costs and increase the competitiveness of the destination, but also guarantee the long-term supply of key resources for tourism at a reasonable price and in sufficient quantity. In this area, the management of the integral water cycle, the increase of energy efficiency, the circular economy of waste management on the island, and actions in the field of sustainable mobility are identified. All this is understood as absolutely necessary to maintain the competitiveness of the destination.
- 2. Improve the image of the destination:** contributing to the opening of new markets and sectors of greater purchasing power and the development of new products and business models. The action of leading, at a time when many destinations try to position themselves as sustainable destinations in Europe, can give an advantage in the transformation and innovation of the tourist model.
- 3. Integrate sustainability into business intelligence and public policy (Smart Destination):** this would imply a greater rationalization of public and private investments, an improvement in the governance of the destination, a balance in inter-municipal actions, as well as a reduction of the ecological footprint of tourism activities. In fact, most technological advances in the industry point to sustainability and cost reduction of resources, which means boosting eco-innovation as a tool for intervention in tourist areas, products and services.
- 4. Incorporating sustainability into infrastructure development:** whether in local interventions (coastal, for example), in urban and commercial areas, or in the initial conception of local public policies, its contribution can be significant to the conservation of the cultural and natural heritage of the island. Consideration of local agricultural, livestock and craft potential would avoid numerous corrective measures in the rural and coastal area of the territory. All these measures have, in any case, in the tourist sector, an as yet unexplored route.
- 5. Integrate the objectives of sustainability in education, training and job creation in the tourism sector:** poverty reduction, equality policies, efficiency in the use of natural resources or the fight against climate change, to cite some examples which could contribute not only to the transformation of the island's education system, generating a more specialized job offer, but also to having more aware citizens and more suitable tools for future challenges. Investment in the green economy, inclusive growth and collective action in the field of sustainability arise especially within the organisations themselves.
- 6. Addressing the risks of climate change and global warming already perceived globally is not a choice for a mass tourist destination in Europe:** this means that measures to adapt to the impact of climate change must be integrated into island economic development. They should therefore be part of the design and management of infrastructures (ports, airports or roads) or the development of tourism products before they are used in other countries or destinations. Integrating the prevention and management of forest fires and natural hazards is an obvious objective in the area of sustainability in Tenerife, so it should be the centre of the island tourist strategy beyond the responsibility falling on different authorities. It is strategic to visualise that importance is given to each and every one of these areas by tourist governance.
- 7. To maintain and improve the levels of well-being in the local population:** through policies of health, equality, internal security, protection of marine and terrestrial ecosystems. This contributes directly to the image and economic income of the destination through the development of activities and healthy living standards for the local population, which will constitute a fundamental complement to the potential of new tourism products that will be associated with the image of the Island.
- 8. To make visible, to reward and to make known individual and collective actions:** they serve per se to give added value to the image of the destination and of its production system, at the same time that they set the way for the other agents in the sector. On the other hand, it should be in the medium term an objective of the sector to implement the capacity to penalize, through different mechanisms and in a transparent way, those actions and decisions that reduce tourist sustainability.
- 9. Finally, the sustainability of tourism activity, understood as the need to avoid scorched earth actions:** for the development of infrastructures, products or for land transformations, since they damage, in the long term, the image and the competitiveness of the destination and the generation of financial resources for the public sector, a reason why it must be an objective in all island planning and strategic development. This reflection requires integrating sustainability in the renewal and development of new accommodation infrastructure and regulating holiday rentals, as well as the underlying demand for resources and infrastructures or the progressive exclusion of the local population from residential areas. Thus, it is necessary to adjust the financial needs and services of local governments to the income generated by the tourism sector



Axis 08_01

Programmes in the field of sustainability

The establishment of a strategy of staggered sustainability is proposed that, without losing sight of the final objective of the same, allows a solution to the difficulties and obstacles that may arise at each step. This strategy must be designed in several stages that will be completed progressively, going back if necessary to solve problems that may arise.

08_01_01

Moving from a reactive to a more proactive system of sustainability

A paradigm shift is proposed to address sustainability, not only based on responding ad hoc or reactively to the impacts and situations that may occur, but to anticipate them in order to modify them. To do this, it is necessary to clearly identify the potential of the actions in each of the axes of the intervention strategy in the matter of sustainable development, as well as for each sustainability objective that is considered a priority by the sector.

As an example, a proposed tool would be the development of a matrix in which two types of variables are crossed: on the one hand, the axes and, on the other hand, the sustainability objectives considered by the sector. In this way, the weaknesses and strengths of each axis can be identified in relation to these objectives and the capacity to promote tourism development from sustainability.

08_01_02

Sustainability research

To know the risks and the priorities about the sustainability of tourism it is necessary to have more and better information on its economic, social and environmental impact. Therefore, it is considered fundamental to strengthen the research into tourist sustainability in order to know where the island is with regard to the different aspects that cover this area.

In this context, it is also proposed to increase research on sustainable tourism from the Department of Tourism with the aim of generating knowledge, making visible and disseminating good practices in the sector, and developing tools that contribute to improving the tourism strategy in this regard.

Integration in collaborative work is essential to face this line of work. Both the Tenerife Island Council, which is working on a project derived from the Common Good matrix, and the Chair of Tourism at the University of La Laguna, which is promoting a study for the measurement of tourist activity at local level, can contribute in this way.

Likewise, it is essential to incorporate new measuring instruments, complementary to those already in existence, that allow the identification of possible priority areas for action on environmental quality and sustainability.

08_01_03

Awareness and knowledge of natural wealth

In a similar way to previous actions, training and awareness actions are offered to visitors and, above all, residents, in relation to the value of Tenerife's natural resources, putting emphasis on education in values with regard to the objectives of sustainability, developed in greater detail in *Axis 10_02 Programmes of awareness and links with the local population*.

As is detailed in the said axis the idea is to integrate actively the island population in the achievement of tourist sustainability by way of awareness and by its active participation in the protection of the island.

08_01_04

Good practice incentives for companies committed to environmental, social and economic sustainability

It is essential that tourism companies work under the same public scheme of independent and credible certification, recognized in other countries and requiring regulatory compliance, employee participation and transparency. Membership of the Eco-Management and Audit Scheme (EMAS) enables organisations to disseminate information on environmental performance, as well as open dialogue with the public and other interested parties, actively involving staff and interest groups.

Tenerife is one of the national territories with the largest number of companies affiliated to EMAS. This voluntary regulation of Rule (EC) No1221 / 2009 of the European Parliament and of the European Council recognizes those organisations which have implemented an environmental management system and have acquired a number of improvement commitments in this area, which also obliges them to issue a declaration verified by independent audits.

Thirty-five tourist companies are currently affiliated, of which twenty-nine are hotel establishments in Tenerife. All of them receive annual certification audits by third parties that verify the degree of compliance with their objectives of waste management, energy saving, water efficiency, responsible purchasing policy and greenhouse gas emissions.

To continue in this line it is proposed:

- **Incentives for tourist companies to join the EMAS Registry:** incentives to reduce regulatory obstacles for companies certified and committed to environmental improvement that have a positive track record. For example, in the case of active tourism companies, expedite licence renewal and introduce exemptions in the need for transport cards.
- **Introduction of social and environmental clauses for the procurement of public work.**
- **Support and facilitate investment in projects with a clear contribution to sustainability.**

08_01_05

Actions aimed at integrating sustainability as part of the image and quality of the destination

The demands about the sustainability of the destination made by visitors from other countries are increasing in importance. That is why sustainable tourism must be seen as an asset that generates value to the island and not simply as a duty for future generations.

In this line of integration of the image and the management of the destination, it is necessary for Tenerife and its companies to be present at trade fairs, events, awards ceremonies, and projects aimed at sustainability, in addition to ensuring that the development of tourism activities maintain and respect the biodiversity and natural values of the island.

08_01_06

Sustainable actions in the field of resource management, energy efficiency and renewable energies

Within sustainable actions in the field of resource management, renewable energy, energy efficiency and water consumption the following lines of work are proposed:

- The drawing up of **eco-innovation projects in tourist areas**, developing actions of energy efficiency, sustainable mobility, clean energy and water and waste management.
- Implementation of models of **sustainable mobility** related to tourist activity: promoting cycling, electric cars, etcetera.
- Use of Tenerife's **energy potential**, which due to its meteorological, geological and oceanographic conditions can install in the sector the use of renewable energy sources or develop tourist products and services around them.

- Incorporation of **criteria for energy efficiency and use of renewable energies** into the renovation guidelines of the accommodation offer.

- Development of **circular economy actions and projects**, such as waste management.

- Establishment of **compensatory mechanisms**, which contribute to the compensation of the carbon footprint of residents and tourists during their stay, to generate resources that enhance the conservation and revaluation of forest ecosystems, and to adequately highlight the importance given to global problems in Tenerife. Reforestation is proposed as a carbon offsetting mechanism, which would, on the one hand, help recover natural forest resources, and on the other hand, project a positive image to tourists.

08_01_07

Sustainable actions for local development

Tourist activity, due to its effect on other sectors of the island economy, can strengthen other economic activities through development synergies that emphasise local production and the contracting of local suppliers, support for the economy and the hiring of labour. Also, the enhancement of employment generating activities that contribute to the quality of life of the local population.

It is about promoting sustainable tourism that stimulates production through local consumption and offers business models that are respectful of the environment and local customs. Likewise, this stimulus also happens because the investment of part of the income obtained serves to boost the development of local infrastructures.

In relation to local supply and production, the gastronomic side of tourism is a vital factor to promote local growth and value chains. In this line, it is committed to the policies of "km 0" in relation to the supply of products for tourist activities, as well as the coordination between entities and companies in the sector.

On the other hand, the large international distribution chains, also established in the island through the HORECA distribution channel for hotels, restaurants and catering, have begun to integrate very strong sustainability strategies due to both consumer demand and risks about food safety, as well as other social risks related to inequality perceived from the organisations.

08_01_08

Tenerife's leadership and commitment to tourism sustainability

Sustainability actions need leadership to be effective and, in the case of Tenerife, it is proposed that the Tenerife Tourist Board be the one which exercises it and also be in charge of making visible the degree of achievement of the different objectives that are established. This would require:

- A **permanent working group for sustainability** that analyses and proposes actions for sustainability on the island.
- The creation of a **letter of commitment to sustainability** as a collective action that accompanies the approval of the Tenerife Tourism Strategy, and which includes a high degree of visibility that invites the commitment to sustainability of those involved. This letter would contain a series of principles and actions that allow the adherence of agents of the sector, public institutions and organisms in favour of tourist sustainability.



Axis 08_02

Inclusive tourism: programmes in the field of accessibility

As defined by the World Tourism Organisation (WTO):

Inclusive tourism is tourism that allows **equal opportunities** for all people to develop all the actions that make up **tourist activity** in a safe, comfortable, autonomous and standardised way, and also seeks to find economic profitability, seeking to benefit both the disabled and companies in the sector.

Creating smart, sustainable and inclusive environments involves integrating people with different capacities in the destination, eliminating physical and attitudinal barriers that limit their enjoyment of the same.

Inclusive tourism is much more than accessible tourism. It encompasses a wide variety of people who may well have deficiencies in their physical capacities; the decrease or loss of auditory or visual sensory capabilities; an intellectual capacity lower than that considered normal; people with multiple deficiencies; elderly people; those with temporary injuries that reduce their abilities; pregnant tourists in an advanced state of gestation, whose physical mobility is temporarily reduced; and also people who carry baby carriages or other elements that hinder their mobility.

The implementation of inclusive tourism benefits all those who visit us, both the group that demands it as essential in order to carry out the activity, as well as the usual clientele, which has accessibility to the environment and perceives it as an unconscious emotional enjoyment and a symptom of quality.

The programmes to be developed in this area should contemplate that:

- The implementation of accessibility in all components of the tourism sector improves the quality of tourism, giving it an **added value** that will benefit the entire clientele, regardless of their personal situation.
- Inclusive tourism means an increase in market share, incorporating people who currently do not travel due to lack of accessibility and also those who travel with them.
- It promotes the image of accessible destinations, which increase their emotional enjoyment by becoming places of reference for the **equal rights and conditions of all people**.
- It helps create a more **sustainable tourism offer**.

With regard to this, it is necessary to create an Island Working Group for Inclusive Tourism, integrated by the Tourism Department, the Simpromi Association, the town halls of the Island and the business sector, which will be responsible for agreeing on

models of performance and accessibility criteria to apply to different areas of tourism. The conception of accessibility in tourism should be a cross-cutting element that must be present throughout the chain that makes up the activity. That is to say:

- In drafting **territorial, island, zonal and municipal plans**.
- In the **establishment of guidelines for accessibility** in public, private (hotels and shops), as well as in other infrastructures for tourist use (theme parks, museums, footpaths, beaches, nature areas, etc.). It is important that Tenerife has an updated inventory of infrastructures and tourist resources accessible on the island
- In the development of tourist products and activities, contemplating the accessible leisure sector and its specific requirements.
- In the channels and promotional mechanisms of the tourist destination, contemplating at all times its adaptation to accessible versions.

Axis 08_03

Strengthening coexistence in diversity as a tourist asset

The International Year of Sustainable Tourism for Development emphasises the role of tourism in economic and social inclusion through two of its key areas:

- 1) Inclusive and sustainable economic growth.
- 2) Social inclusion, employment and poverty reduction.

Tenerife offers a satisfactory state of social coexistence in a context of important cultural diversity, free from serious conflicts, which provides a suitable framework for the development of tourism and its external projection.

As of 2016 one fifth of Tenerife's inhabitants were born abroad, from a total of more than one hundred and seventy different countries, the majority being of South American and European origin. The most important recent migratory flows have been linked to the impulse of tourism, which is evident in the settlement and the activity of the new residents in the places near holiday areas, due to the fact that it is there that the most dynamic local labour markets have been formed.

Through the Island Council, Tenerife joined the Spanish Network of Intercultural Cities in 2012, thereby opening a period of shared work in favour of recognizing cultural diversity as a development factor in all its aspects; and deepening and enriching the work already done since 2001, through the Tenerife Observatory of Immigration and collaboration with the University of La Laguna, expanded in 2009 by promoting the initiative **Together in the same direction**, which currently is still in force and consolidated to be an instrument to provide adequate management of the cultural diversity of the island, emphasizing the intercultural perspective of social coexistence. Tenerife also participates in the programme *Intercultural Cities*, promoted by the Council of Europe and which gives it the category of "Intercultural Island", submitting every two years to a rigorous assessment or external audit by the said institution.

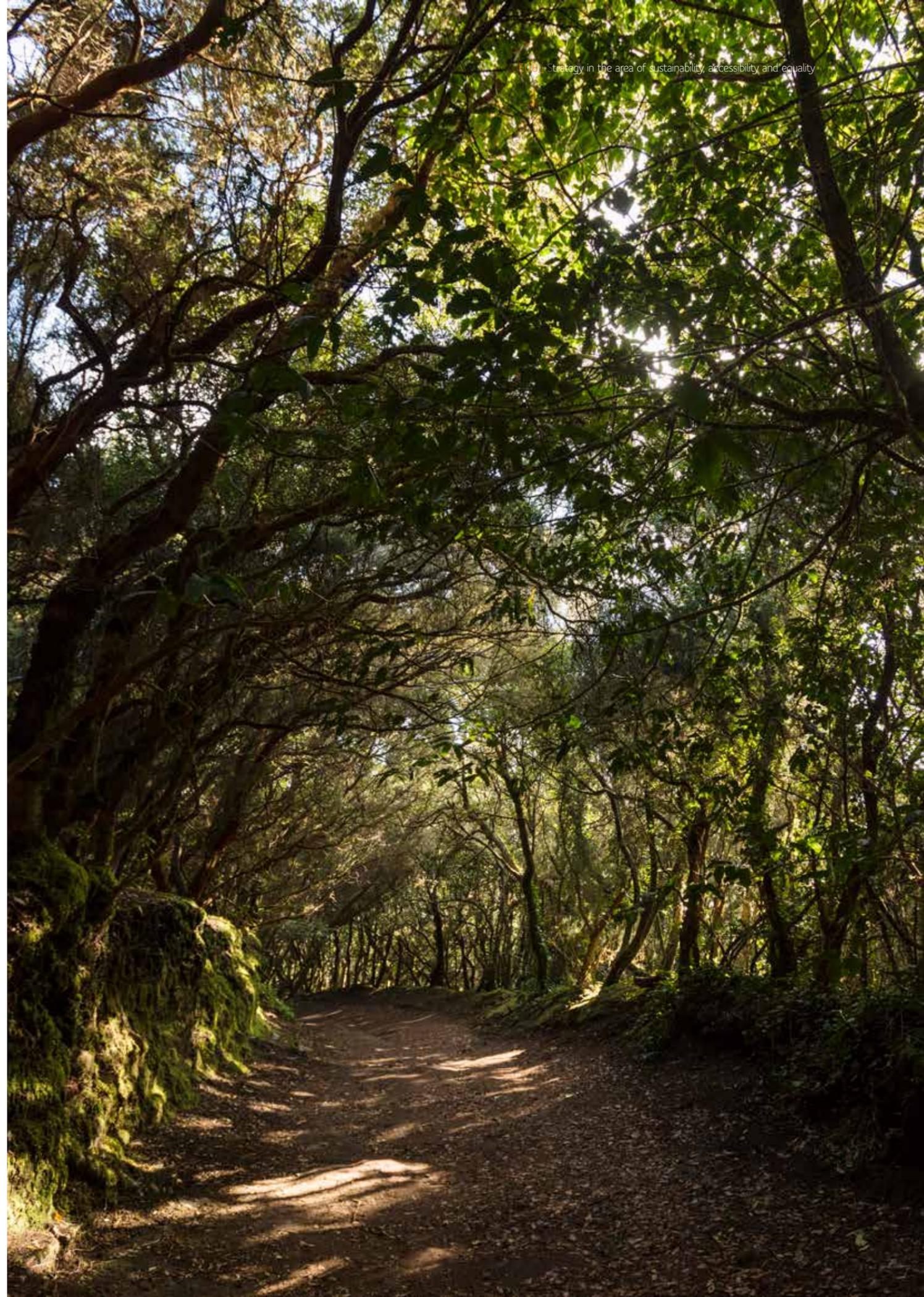
Interculturality as a pole of attraction

In this context it is considered that the tourist development of the island is likely to maintain an adequate social coexistence which is free of conflicts and can contribute to make an attractive destination due to its positive social environment. The absence of conflicts also coincides with one of the arguments of the island positioning: Safety, highly valued by the tourism that visits Tenerife.

Interculturality is a positive and attractive concept for international tourists because it helps them feel "welcomed" in an environment where they know that the multiple dimensions of human and cultural diversity are respected and valued: origin, language, religion and customs, among others. Nowadays it is recurrent that people seek this intercultural component on their trips.

Therefore, different actions are proposed aimed, on the one hand, at consolidating the efforts already being developed by the island in the area of fostering coexistence with an intercultural approach; and on the other hand, to promote the dissemination of the work carried out and its impact on the formation of a destination with an absence of conflicts, which is based on a society aligned with the so-called culture of peace. The priorities are:

- Strengthen **scientific and applied research linked to the interaction between tourism and the positive management of cultural diversity**, to position Tenerife as a leading destination in the discovery and development of the benefits of this relationship.
- Incorporate **the seal of "Intercultural Island"**, endorsed by the Council of Europe through the Intercultural Cities programme, to promote the island's tourism as a destination with an intercultural focus.
- Disseminate actions on **positive management of cultural diversity** in Tenerife through the island's tourism promotion tools: information leaflets, web portals, and so on.
- Promote **specialised training of people who are employed in the tourism sector on issues related to interculturality**, i.e., the relationship between the cultures present on the island and the culture of the visitors to the island.
- Include in the visits of journalists and other participants specialised in tourism knowledge of the strategies that have been promoted in Tenerife in the matter of **promoting coexistence and positive management of diversity**.
- Effectively apply, in the set of programmes contained in the Tourism Strategy, the regulations on **equal opportunities for both sexes**.





Strategy for investment attraction and development of strategic projects

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AXIS 09_01

Programmes to attract tourist investment

The programme for the attraction of tourist and support investment must respond to the needs posed by zonal models, infrastructure investment plans, product development plans and, in general, investment needs identified for development of specific tourist areas, be it a direct tourist activity or activities that are developed in other sectors and that are necessary to give support. In this way, it will be possible to create and manage the multiplier effect of tourism on other economic branches.

The main lines of action are as follows:

- Link the needs of the destination to **projects of services and products**.
- Draw up a **catalogue of tourist areas which require financing for their specific needs**, establishing the criteria and conditions to be met by these investments in the destination.
- Make a **catalogue of business opportunities** in the tourist areas where funding is required, including areas of land still available for the development of tourism projects. Dissemination of the same through information platforms and networking.
- **Coordination between entities** that comprise *WhyTenerife?* as well as with other regional entities that work in fundraising.
- Increase **collaboration with Ashotel and other business associations**, the Consortium for Renovation of Puerto de la Cruz, town councils with high levels of tourism and private companies that offer services related to tourism in order to obtain updated information on opportunities for investment in this sector.

Axis 09_02

Tenerife Film Commission: investment attraction programmes in the audiovisual sector

The Tenerife Film Commission was created in the year 2000 to promote audiovisual production of all kinds on the island, at the level of foreign producers, as well as producers from the Spanish mainland and Tenerife. It also aims to promote the island as a place to make films through attendance at specialised trade fairs, presentations and festivals of the sector.

From the beginning, this commission was under the umbrella of the Tenerife Tourist Board, and in particular of its Promotions Department, due to the firm conviction that this film making was a powerful instrument for tourist promotion and, therefore, a way to attract tourists.

In recent years, new challenges have been incorporated into its ordinary activities. Aspects such as the implementation of strong fiscal incentives linked to the Canary Islands Economic and Fiscal Regime (ZEC, Audiovisual, etc.) and the energetic irruption of new sectors linked to the audiovisual sector (animation, video games, or virtual and augmented reality), which have given meaning to a new mission for the Tenerife Film Commission: the attraction of companies and businesses that install themselves in Tenerife.

The boost to the activity of this platform in the coming years is set out in the following points:

- **To encourage Tenerife to become an authentic Film Friendly Island:** with agile and telematic administrative procedures to obtain permission to shoot from the administration, always respecting the regulation of these spaces and their identity values. Special consideration for the case of shooting in the Teide National Park and protected natural areas.
- **To improve the professionalism and skills of the audiovisual sector:** with specific training programmes in specialised areas (audiovisual and animation), which serve to attract foreign companies.
- **Attend trade fairs and specialised events to promote:** the opportunities offered by the Canary Islands as a whole for filming and the advantages of permanently installing in Tenerife, taking advantage of the island's differentiating resources.
- **Create recording studios** in Tenerife.

10

AXIS

Strategy in society and employment

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Tourism and Society, two focal points and two realities that converge on the island, so we must achieve a balanced and fair exchange between visitor and the local population.

The economic and social development of Tenerife depends directly on tourist activity. The impact of tourism, driving development in other sectors, places it at the centre of its economy, with ramifications and synergies in practically all economic activities present on the Island. However, we can not forget the negative aspects that this activity generates, and it is also intended to reduce these through the strategic lines developed in this Strategy.

The latest figures from the Impactur Accounts prepared by Exceltur quantify the contribution of tourism activity in the Canaries, directly and indirectly, at 31.9% of GDP and 37.6% of employment.

The effect of tourism activity on the production system (GDP) is estimated by a multiplier of 0.5, which means that, for every one hundred euros of added value generated by branches in direct contact with the person visiting Tenerife, almost fifty euros are generated in other sectors of activity not directly related to tourism.

The implications for employment are equally important, with a multiplier coefficient of 0.46, which means that for every one hundred jobs created in branches in direct contact with tourism, there are approximately forty-six other occupations in sectors not directly related to tourism.

Although the Island Council does not have direct authority in educational matters, through its strategy 'Tenerife 2030' it assumes the leading role in the training of people on the Island, as a complement to the current educational system. This axis defines five programmes in the areas of training, innovation, entrepreneurship, culture, sport and technology as pillars in the personal and professional development of the population of Tenerife:

- Programme 1.1: TF Educa.
- Programme 1.2: TF Innova.
- Programme 1.3: TF Creative.
- Programme 1.4: TF Sports.
- Programme 1.5: TF Digital.

At the same time, the Tenerife for Employment Programme, also included in Axis 4 of the MEDI, encompasses different initiatives specifically aimed at promoting employability, taking into account the specific situation of different groups and designing tailor-made programmes for each.

These include the *Areas for Employment* initiative to improve the employability of people who find it more difficult to access a job; *Tenerife for Employment*, a programme for young people; *We are with them*, programmes to promote women's access to the labour market; and programmes to promote the employment of persons with disabilities.

Axis 10_01

Programmes in the field of employment and training

The increase and improvement of employment in the tourism sector makes it necessary to consider some of its particularities.

1. Although it is a sector with many people with low-level education, it should not be forgotten **that part of the qualification is obtained through accumulated experience.**
2. It is a sector in which both situations of over-qualification can be observed (with the inconveniences for personnel and companies that this supposes) as well as **under-qualification.** This is the case of the lack of language and interpersonal skills in some groups of working people.
3. On the other hand, **standardisation of responsibilities** is important, given the variety of activities that include tourism. It is possible that the small size of many companies also requires a large number of tasks, and in many cases they do not achieve adequate competitive specialisation.
4. **The sector lacks a good image**, which leads many people to reject working in it. Part of the image of the sector has to do with some of its working conditions and salaries which hold no attraction for talented people.
5. Occasionally, **experience is the main factor in being hired**, so formal educational is less important than experience.
6. The educational level of **the business community is not always optimal.**
7. An important part of jobs are occupied **by foreigners**, with few roots on the island or with little knowledge of its most important values.

We must also take into account some additional processes to understand what is happening in the sector:

1. **The necessary coordination between training and employment does not occur with sufficient dynamism:** what contributes to this is that it is one of the most innovative, changing and multicultural activities that exist.
2. **Certificates of professionalism** have formally accredited and recognized the experience of many employed people.
3. **Personnel with qualifications who gain access to the sector come from regulated education**, either professional or from university, as well as accreditations through the recognition of experience, and the training provided by the Canary Island Employment Service and other public and

private bodies. There is a lack of coordination in the planning of training and also uneven distribution of resources oriented to training.

4. **The mechanisms to identify training needs are insufficient** or not very dynamic.

For all of the above, the following lines of work are proposed:

- **The search for efficient mechanisms for a better coordination of training directed to the sector**

This means putting in contact the different administrations in a line of work that seeks to avoid training overlaps, a better distribution of economic resources and a more adequate clarification of the formative map oriented to the sector. It makes sense here that the corporations responsible for education should coordinate with those responsible for vocational training for employment; also that initiatives aimed at improving island or municipal education should be coordinated with regional and state governments, as well as establishing clear leadership points regarding coordination in training projects, whether directed to employment or not.

- **Improve knowledge of the educational needs of the sector with more dynamic and efficient formulas**

There is insufficient prior analysis by educational organisations and those oriented to training for employment of the organisational needs and changes that business environments are suffering. While there is no doubt that training can not and should not be adjusted to the dimension of employability, it is true that the effort to describe and analyse organisational changes is not enough. Coordination between different administrations may be a good strategy to create or strengthen mechanisms for monitoring business and economic changes.

- **The improvement of the image of the sector should take account of its link to certain labour and wage conditions**

An improvement of these conditions will also give a positive and attractive image, which will make it possible to attract talent.

- **Follow-up to the guidelines of the sustainable development agenda of the united nations**

Last but not least, it is important to bear in mind in employment policies that, within the framework of the Agenda of the 17 Sustainable Development Objectives, one of the main sectoral challenges is the one related to employment, especially when it comes to ensuring that tourism companies offer decent and stable employment to the workforce, particularly women and people with disabilities.



10_01_01

Coordination programmes for the promotion of employment and entrepreneurship

Coordination between the different administrations, as well as with the private sector, to strengthen the mechanisms aimed at observing business and economic changes, and the opportunities that derive from them through:

- **A catalogue of business opportunities** in the areas of tourism that require investment.
- Networking to encourage the transfer and **collaboration of small tourism businesses**, offsetting the competitive weakness of a micro-enterprise business network.
- **Advisory programme in terms of acceleration, tutelage and investment for entrepreneurs and tourist startups** with the participation of large consolidated companies. Large companies are slow and more conservative, but they have privileged access to the market, while startups are more innovative and can bring a “nerve” that big ones do not possess. This connection is not only through *mentoring*, but also through strategic alliances that are forged between the two types of agents. For this to be possible, it requires intermediaries who relate to both worlds, because at the present time they communicate very little with each other.

- **Expand the business collaboration network**, intensifying the incorporation of tourism companies in sectors linked to priority tourism products, analysing new forms of collaboration with associated companies.

10_01_02

Programmes in the field of professionalisation and training

In the field of tourism training the current dispersion and overlapping of supply, both for SMEs and independent and unemployed professionals, requires a unification and coordination effort aimed at reducing the current dispersion and redundancies in that area.

For this, it is necessary to identify training demands with companies and tourism entities that allow the design of a “common agenda”, which will also revert to cost savings, when shared. In this line, the following proposals are made **for coordinating the training offer**:

- **Continue with the working group on Employment and Training** created in the development of the strategy as a coordination tool. The end result could be a unique portal that brings together all specialised training for the tourism sector.
- **A line of collaboration between human resource managers** of the companies in the sector, extending the one that GEHO-CAN has already initiated to other branches of tourist activity.
- Participate in the design of **educational content in the field of tourism** in educational institutions and vocational training centres.

Regarding the **knowledge of the training needs of the sector**, it is necessary to detect knowledge gaps and employment needs in tourist activity in order to promote, together with educational bodies, contents that are required for the improvement of tourist activity.

Finally, **languages: a key subject in tourism activities**

It is a priority to achieve a radical change in the model of language teaching in the Canary educational system with regard to language learning, which also involves a necessary strengthening of the same in vocational training in tourism. In this sense, the Education Department of the Tenerife Island Council has been promoting the Dual Training and language immersion programmes for some time. In spite of the impulse that is being given to the acquisition of languages, it is important to make the responsible entities in education aware of the importance for the island of the promotion of foreign languages in schools from an early age.

Likewise, there is a proposal to create an International Language School in Tenerife, which would contribute to enhance language learning, both among the resident population and visitors from abroad.

10_01_03

Image of the tourist profession

The improvement in the image of the sector must take into account its link with certain working conditions and salaries. An improvement of these conditions will also give a more positive and attractive vision. In this sense it is necessary to:

- Analyse the **perception of society about tourist professions**, as a starting point for their recognition.
- Study the feasibility of implementing programmes that contribute to **improving the working conditions and salaries** of tourism professionals.
- Make Tenerife a **destination of reference for specialised training in tourism**.

10_01_04

Achieving gender equality in tourism

Most of the staff and entrepreneurs in the tourism sector worldwide are women, but they often occupy low-paid jobs, perpetuating inequality at economic and social levels.

The tourism sector can be a vehicle that provides decent employment for women at the local level, enabling them to improve their living conditions and enjoy greater autonomy. To this end, tourism companies can promote a type of tourism that contributes to improving the quality of women's employment and enables them to gain access to qualified jobs, creating job training, integration and equality programmes.

In addition, the inequality of women in the field of work will be taken into account for training and employment programmes, proposing positive action measures in accordance with current regulations. The balanced representation of women and men in consultation and decision-making will also be ensured.

Axis 10_02

Awareness-raising and social participation programmes in planning and management initiatives linked to tourism development

The true implication of the citizenship of Tenerife in the improvement of the main economic activity of the island needs its effective participation in the planning and management processes that are related to this productive sector on an island and municipal scale. For this reason, it is fundamental to design strategies for this concurrence and participation to occur, making available adequate means and achieving that the existing interest, which is increasingly perceived, is converted into specific actions with demonstrative effect. To this end it is proposed:

- **To create and / or strengthen existing structures and instruments** to promote social participation in actions of planning and tourism management, both at island and local levels.
- **Generate specialised training** so that citizens can participate with guarantees in the planning and management processes related to tourism development.
- **Establish programmes that impact on commitment and social participation** in relation to the necessary citizen involvement in the planning and tourism management processes.

10_02_01

'I am Tenerife'

The initiative 'I am Tenerife', launched by the Tenerife Island Council through the Tourism Department, was created to spread and share a common goal with all of Tenerife society: to show their friendly and welcoming character and share it with those who visit us. Each person who lives on the island is also part of the experience of those who come to discover Tenerife. Kindness, friendliness and good treatment are characteristic of the population of Tenerife and something that other places can not copy.

The different programmes of awareness and involvement of Tenerife society have as a central axis of communication the "I am Tenerife" campaign.

10_02_02

Tenerife society: Tenerife's tourism promoters

This line of work aims to integrate more actively the people living within tourist activity, making them, on the one hand, tourist promoters of their island and the importance of its values, while promoting employment initiatives between local people. In particular, this idea is based on:

- **The promotion of the knowledge and enjoyment** of the tourist resources of the island in order to turn the local people into experts on Tenerife.
- **To promote the participation of the local population** in the creation of the tourist product.
- **To promote the kindness of Tenerife** for the people who visit us as a great added value and differentiator of our destination.
- **Develop awareness campaigns on the importance of caring for our island:** recycling, and the cleaning of beaches, hills, ravines, roads, paths, etc.

10_02_03

Involvement of Tenerife society in initiatives to improve the environment and tourism

There are many lines of work of this Strategy that count on the involvement of local society in tourism, not only as recipients of the economic and social benefits of the activity, but also as agents involved in the same that ensure the sustainability of the destination and its integral improvement.

In this way, two major objectives are to be addressed: on the one hand, raising awareness of the necessary sustainability of the island of Tenerife; on the other, getting local people to become inspectors and agents, "caretakers of the island", through interventions that affect tourism and the resident population itself. For this it is needed:

- The contribution of proposals **of initiatives to beautify and improve tourist areas**.
- Make proposals of **initiatives for the progress of the tourist service**.
- Design proposals for **energy saving initiatives**.

- Have **instruments that allow them to communicate the detection of faults**.

- Facilitate **instruments that allow them to report environmental damage**.

It is important to link this line of work with the *Intelligent Citizenship* Programme included in the MEDI, which aims to bring the administration closer to the citizens by making practical and intuitive solutions available to mobile devices, instruments that must be adequately equipped to give answers and manage the proposals raised by citizens. Likewise, these actions will be carried out in collaboration with the activity being developed by the Participation and Environmental Volunteering Department managed by IDECO.

10_02_04

Awareness and knowledge of tourism

It is based on:

- Defining a dissemination strategy to **publicise how tourist companies work** with activities in schools, institutes, universities and other centres and groups.
- **Disseminating tourist activity on communication channels** such as newspapers, radios, blogs and social networks.
- Encouraging **greater involvement of social media** in tourism by organizing press trips for local media.
- Encouraging **meetings between local people and the tourist industry**.
- Incorporating **knowledge of the tourist activity and its meaning in the educational curriculum**, in collaboration with the Ministry of Education of the Government of the Canary Islands.



ANNEX

Tourist activities

ANNEX

01

Climate - Bathing - Coast

Relevant data of the activity

The pleasant climate and the mildness of the sea temperature prompted Tenerife to start receiving tourists from the last decades of the 19th century. At that time, thousands of people with health problems came from Europe to the island to recover from rheumatic, cutaneous and respiratory diseases, taking advantage of the Atlantic environment of the Canaries and the benefits of its waters. Although previously it had been a destination for explorers, botanists and geologists, Tenerife began thus to become the important holiday destination that is today.

Although the “sun and beach” model has reached its maturity level in Europe, with growth rates lower than those for other activities and facing significant future risks, it is still the product which makes up the greatest volume of tourists and business, both in global terms (representing 80% of holiday tourism) and for the Canary Islands (more than 95%), as set out in the document *The Canary Island Brand Marketing Plan 2016*.

In Tenerife, this classic tourist product is in a mature state. In addition, it is difficult to delimit it since complementary activities have grown up around its initial nucleus: sunbathing on the beach and bathing.

The basic “sun and beach” product is often confused and mixed with other activities linked to it, especially in regard to leisure and recreation (*banana rides, parasailing, pedalos, etc.*) and even with activities that belong to water sports.

The 2016 marketing plan of the Canary Island brand states that the ‘Sun and Beach Plus’ proposed in the Brand is made up of, together with the main proposal of traditional ‘sun and beach’ oriented to rest and relaxation, a wide complementary offer aimed at the discovery and enjoyment of each one of the seven island destinations. With this, it is intended that, on the one hand, this new model gives them value and differentiates them from competing destinations, and on the other hand, facilitates the expansion of tourism activity and spending to the entire Canary territory. The plan states that this complementary offer is made up of the following proposals:

- Gastronomy (traditional and avant-garde).
- Enjoyment of nature and hiking.
- Routes of discovery of the destination and its identity.
- Cultural visits.
- Outdoor activities (walking, running, cycling, beach volleyball, gymnastics, etc).
- Theme park fun
- Initiation and enjoyment of water sports (wind and waves, diving, snorkeling, kayaking, surfing, paddle surfing, jet skiing, motor boating, sailing, deep sea fishing ...).
- Whale and dolphin watching.
- Star observation.
- Initiation and enjoyment of golf.
- Late afternoon / evening leisure and shopping.

In the Tenerife Strategic Plan 2017-2020 / 2030, given the great importance of the climate in the tourism positioning of the island, as well as the importance of the enjoyment of its coastline (both beaches and other places, such as natural pools), the “sun and beach” tourist activity changes its conceptualization to ‘climate and sea or climate and coastal bathing’.

We must not forget that this product is pivotal and continues to make up the island’s tourist model, even identifying the model with the product, which sometimes causes great difficulty in defining actions, methods, objectives, etc., without reaching a general consensus on its redefinition.

On the other hand, the development of the accommodation supply and tourist centres and areas, which have grown around the place where this activity is located (beach or coastal areas), further complicates the delimitation of the same.

This amplitude and difficulty in definition limits the possible actions for improvement and development, which in the majority of the proposals are directed toward the “complementary” elements or extensions and not towards the central nucleus of the product.

Data relating to demand

Data collected by the Tenerife Tourist Board from the *Survey on the tourism that visits Tenerife 2015-2016* (Tenerife Island Council).

Visitor Profile

Due to the difficulty of delimiting the borders of tourism with other offers of activities on the island, it is not possible to define an exclusive profile of the ‘climate and coastal bathing’ model of tourism which would cover all the tourism that visits Tenerife.

If we take into account the motivation of why tourists choose Tenerife as a holiday destination, the climate is placed in first position, with 60% of the people who visit the island giving this as their main reason. However, the sun, as an element different to the climate, is mentioned by only 25% and is more related to the motivational aspect of rest and relaxation than the aspect of climate. Meanwhile, coastal aspects, such as the beach, are the main motivational factor for 6%, similar to that of water-ocean motivation at 5.9%.

There is unquestionably a close link between the motivational concepts of climate, sun, sea / water / ocean and beaches and rest, although the specific concept of the sun is more related to rest than that of the other three elements, which seem to imply a little more active involvement.

Data relating to the offer

Resources

Tenerife, with a total coastline of 398 km, almost 70 km of beaches and 47.6 km of low coastline (different from the beach-

es), has a wide variety of bathing areas, whether of black sand, volcanic, wild beaches or yellow sand, together with volcanic pools and natural pools. In addition, it has the fortune of having an average temperature of 22 or 23 degrees, ideal for enjoying nature and the sea.

To these natural resources we can add factors of great importance such as:

- A safe sea with few dangers.
- Unusual landscapes.
- Unspoilt nature.
- Safety in the broad sense.
- Comfort.
- Ease of access.
- Innumerable services

The Tenerife and the Sea programme will address areas of improvement in the coming years through one hundred and forty actions distributed throughout the island.

Legal and jurisdictional orders that regulate the activity

- Coastal Law 22/1988, of 28 July. General State Administration.
- DECREE 98/2003, of 21 May, regulating the minimum measures of safety and protection that the beaches of the Autonomous Community of the Canary Islands must fulfill. Government of the Canary Islands Territorial Policy.
- Law 7/1985, of April 2, on the Basis of Local Law provides for municipal authority in matters of safety in public places and corresponds to the town halls.

Administrative bodies

The Law on Coasts (Law 22/1988, of 28 July) sets out the system of jurisdiction of the various Administrations, more specifically in Title VI.

Current improvement actions

Actions included in the MEDI Tenerife and the sea programme

Intervention or infrastructures of the tourism product and other infrastructures linked to it.

TYPES OF INTERVENTION

- Access to the sea.
- High tide pools.
- Coastal footpaths.
- Coastal walks.
- Coastal parks.

- Coastal renovation work.
- Beach conditioning.
- Heritage restoration.
- Coastal facilities.
- Maintenance and Conservation

Current Promotional Activity

The current promotional activity of this product is connected to the general communication of the island, since it is closely linked to the positioning of Tenerife: a tourist destination with good weather, year-round sunshine and good places to enjoy the pleasant temperature.

Needs identified and the corresponding intervention proposals

NEEDS	PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Conflict with other tourist activities and users that happen in the same place. 	<ul style="list-style-type: none"> ■ Review the regulations and protocols of administrative bodies in the face of user demand, particularly of companies. 	A_01
<ul style="list-style-type: none"> ■ Insufficient resources given to the maintenance of the activity. ■ Poor access to bathing areas. 	<ul style="list-style-type: none"> ■ Work jointly with the different administrative bodies and departments to plan improvement work. 	A_02
<ul style="list-style-type: none"> ■ A scarcity of services for people with reduced mobility. 	<ul style="list-style-type: none"> ■ Work within the framework of the Working Group on Inclusive Tourism about accessibility criteria. 	A_02 A_08
<ul style="list-style-type: none"> ■ Lack of adequate signs and information about the services and activities in bathing areas. 	<ul style="list-style-type: none"> ■ Improve information infrastructure (sign-posting, panels, ...). 	A_03
<ul style="list-style-type: none"> ■ The new model has been made around health and comfort tourism; coastal tourism; healthy and environmental. 	<ul style="list-style-type: none"> ■ Work on new tourist products and services that highlight the climate and enjoyment of the coast. ■ Work to improve the climate-bathing demand must come with a more complete and integrated offer related to healthy and environmental leisure. 	A_04
<ul style="list-style-type: none"> ■ Insufficient specialised information in relation to the services and activities carried out in bathing areas. ■ Negative impact due to overexposure on social networks that lead to undesirable practices or visits to ecologically fragile places. 	<ul style="list-style-type: none"> ■ Improve available information (both online as well as in conventional formats, maps, panels, webs, etc.). ■ Promote a wider knowledge and dissemination of the instruments and tools already available. ■ Give priority to the communication and promotion of the activity and on the importance of the protection of the marine environment and its surroundings. 	A_05
<ul style="list-style-type: none"> ■ Insufficient innovative proposals in relation to the activity of the coast and bathing, and to the corresponding adaptation of resources. 	<ul style="list-style-type: none"> ■ Necessary development of specific programmes that help innovation in this specific product. 	A_06
<ul style="list-style-type: none"> ■ Little compatibility with other tourist activities. 	<ul style="list-style-type: none"> ■ Promote the combination of various tourist activities in relation to this research into potential demand for this activity. ■ Analyse new business models that promote combining this activity with others. 	A_07
<ul style="list-style-type: none"> ■ Poor environmental awareness and education of practitioners. ■ Problems of lack of civility in the use of certain resources. 	<ul style="list-style-type: none"> ■ Orientate more information and training towards user awareness and the public in general. ■ Formulate awareness strategies for the use of fragile resources. ■ Give value to the wealth and fragile natural heritage of the coast and shoreline. ■ Awareness campaigns, putting emphasis on educating children. 	A_08 A_10

ANNEX



Hiking

Relevant data of the activity

Although walking is part of the human condition, hiking incorporates an important feature, which is walking for pleasure. This activity is done in parallel with the rest of mountain activities, which together with the creation of clubs and federations that unite walkers, has led to an increase in the interest for natural and cultural landscapes.

The Spanish Federation of Mountain and Hiking (FEDME) defines the term hiking as follows:

"Hiking is a non-competitive sports activity, which takes place on marked paths, preferably traditional, located in the natural environment; it seeks to bring the person closer to nature and to the knowledge of the country through the patrimonial and ethnographic elements that characterise preindustrial societies, recovering the system of communication channels. Hiking is also defined as an activity that is carried out in large urban areas and which aims to enhance the elements of the natural environment and traditional culture that survive in it" (Hiking Manual, FEDME, 2001).

Tenerife has excellent conditions for this activity thanks to its extensive network of sign-posted trails, its climatic conditions, and the variety of landscapes and ecosystems, to which can be added the active policies to improve and publicise the activity.

Consequently, hiking is an activity that is becoming more and more important on the island, as evidenced by the increase in companies that offer the activity, the volume of people who do it, the large number of tourists that choose Tenerife in order to do this activity and the increased number of repeat visitors in this sector.

Data relating to demand

Data collected by the Tenerife Tourist Board from the survey on the tourism that visited Tenerife 2015-2016 (Tenerife Island Council).

Volume of demand

It is the second most popular activity for tourists (15.6%, an estimated 775,000 tourists), the influx having increased in recent years. Hiking is very important for many people who visit the island for the first time, which is related to the aforementioned growth in the number of those who do this activity.

Economic contribution

Direct spending on hiking generates an estimated income for the island of 12.5 million euros, according to the data collected in 2015. In terms of total expenditure, this sector represents, in the summer period, some 596 million euros in Tenerife, according to the data collected in 2015.

Visitor Profile

- Provenance: mainly from Germany, with other important markets being France, Belgium, Holland, Switzerland and the Nordic countries.

- Important areas for the activity: Teide, Barranco de Masca, Teno and Anaga.

- Despite having a high volume in the south, there is a notable number using accommodation in the north and in non-tourist enclaves, which on the other hand contributes to the redistribution of tourist income.

- Independent tourists, who in addition to hotels opt for other types of accommodation: private homes and apartments.

- High mobility tourism on the island.

- 60% mention the climate as the main motivational factor for choosing Tenerife, and 24% say hiking, reflecting the high attractiveness of this tourist activity.

- Going hiking, the enjoyment of the island's landscapes and the climate are the main motivational factors.

Trip evaluation

- Most valued aspects of the island: landscape, beauty and conservation.

- Aspects that need improvement: access, parking and signs.

- Demands: improvement of the information for the practice of the activity and adaptation of specialised transport.

Data relating to the offer

Resources

The climate of Tenerife allows this activity to be carried out 365 days a year, although certain times are more advisable if you want to enjoy natural elements such as the spring flowering of the tajinaste, a species of endemic flora, found mainly in The Teide National Park.

The great biodiversity of landscapes in Tenerife allows the tourists to choose different trail themes, like volcanic, green or coastal, among others. It is an activity that can be carried out throughout the island in specially prepared zones that make up the network of trails, especially in places such as: the Corona Forestal, Cañadas del Teide, Teno Rural Park, Anaga Rural Park, mid-altitude rural areas, and in protected nature zones on the coast.

Likewise, the existing biodiversity, with more than eight hundred endemic species of flora and fauna, complements the appeal of the diverse landscapes (volcanic, coastal, as well as different types of forests).

Business Offer

Currently there are more than forty companies and independent operators that conduct guided hiking in Tenerife with some tourist orientation, and offer this activity on the Internet. This highlights the considerable potential of this activity in Tenerife, which has doubled in number of suppliers of this service since 2009.

The business offer is made up of micro-companies and self-employed suppliers. Although there are different types of activity on offer, the ones which are predominant are multi-adventure companies or activities in nature, both offering a wide range of activities. Therefore, it is frequent to find the combination of hiking along with other activities, in particular, kayaking, stargazing and whale watching. These companies usually offer their services in several languages, although it is common to find some that specialise in certain markets.

At present, the Active Tenerife association includes some twenty-seven active tourism companies.

Infrastructure

Today there is a network of 895 km of officially approved trails or in the process of becoming so, of which about 2 km are suitable for wheelchairs. The approval process means that they are sign-posted and maintained by the public administration, in some cases by the Island Council and in others by the Town halls. The ratio is as follows:

Management	Km	Percentage (%)
Town Halls	193,63	21,6
Tenerife Island Council	701,50	78,4
TOTAL	895,13	100

It is planned that both the Tenerife Tourist Board and the Island Council Tourism Service will participate, together with the Environmental Department, in the drafting of the Island Trails Strategy as a specific action within the RETURNAT project, whose purpose is to approach planning of this type of infrastructure with a triple objective:

1. To generate a better knowledge and valuation of biodiversity and its conservation, improving the coexistence between society and nature.
2. To improve the quality of life of the population and, especially, the local economy of the areas close to the natural environment.
3. To reinforce the tourist value of Tenerife as a sustainable nature destination.

With this objective measures will be included that standardise signage throughout the island and improve the information given on trails, establishing categories of difficulty and levels of risk.

For this, it is essential to guarantee the maintenance of the trails in order to ensure the safety of the hiker, which to date constitutes one of the main handicaps of the system, since these are infrastructures in constant deterioration due to inclement weather.

As support for the activity, there are four visitor centres within the Natural Protected Areas of Tenerife: two in the Teide National Park (El Portillo and Cañada Blanca), one in the Anaga Rural Park (Cruz del Carmen) and one in The Teno Rural Park (El Palmar). To these facilities is added the Telesforo Bravo visitor centre of the Teide National Park located in the town centre of La Orotava .

There are also several museums and centres related to nature: the Museum of Nature and Mankind in Santa Cruz de Tenerife; the Museum of Science and the Cosmos in La Laguna; the Botanical Gardens in La Orotava; the Botanical Gardens in Puerto de la Cruz; the Ethnographic Museum in Masca; the Cueva del Viento information centre in Icod de los Vinos; the Agua García information centre, in Tacoronte; and the Ecomuseum at Hotel San Blas in San Miguel, offering an ethnographic route.

It is important to connect the trails network with the nearby population centres and with the accommodation and leisure offer (shelters, camp sites, camping areas or mountain refuges) in order to boost local development, as well as generate synergies that allow a sustainable, integrated and segmented offer depending on the different types of users.

TYPE	Nº	Within Protected Natural Area	Connected with footpaths
Caravan parks	4	1	2
Hostels	2	2	2
Mountain shelters	1	1	1
Parador Nacional	1	1	1
Camping Zones	20	14	10
Campsites	4	4	4
Recreation zones	52	20	18
Viewpoints	70	-	-

Source: Environmental Department. Tenerife Island Council

The Strategic Framework for Island Development (MEDI) 2016-2025 of the Island Council includes a series of programmes that will focus on improving the activity:

- 4.7 Tourism Product Improvement Programme.
- 5.2 Programme for the Public Use of the Natural Environment.
- 5.4 Teide National Park.
- 5.5 Teno Rural Park.
- 5.6 Anaga Rural Park.

Legal and jurisdictional orders that regulate the activity

Canary Island Regulations

- Legislative Decree 1/2000, of 8 May, approving the Consolidated Text of the Laws of Ordinance of the Territory of the Canary Islands and the Natural Areas of the Canary Islands.
 - Law 11/1990, of July 13, on prevention of ecological impact.
 - Law 7/1995, of April 6, on the Tourism Planning in the Canary Islands.
 - Decree 11/2005, of February 15, establishing the Canary Trails Network and regulating the conditions for the management, homologation and conservation of the trails in the Autonomous Community of the Canary Islands (BOC nº 41, of 28.2. 05).
 - Order of 23 February 2007, which regulates the types of signs, their characteristics and use in the Canary Trails Network.
 - Decree 88/2012, of November 15, regulating the access and exercise of the profession of tourist guide in the Autonomous Community of the Canary Islands, of November 15, amending Decree 13/2010, of 11 February.
 - Decree 37/2014, of 9 May, amending Decree 89/2010, of July 22, regulating the activity of tourist intermediation.
 - Decree 72/2012, of August 2, approving the Regulations for the development of Law 13/2007, of May 17, on Road Transport Planning in the Canaries.
 - Plans and Norms of the different Protected Natural Areas, management instruments that regulate the uses and activities that can be carried out in each space.
- The Government of the Canary Islands, through the General Directorate of Tourism Planning and Promotion, made public on April 21, 2017, the Draft Decree approving the regulation that establishes the legal regime for the development of active tourism activities.

Authorities

REGULATION: GOVERNMENT OF THE CANARY ISLANDS

- Department of the Environment. In some cases this Department has financed the building of trails.
- Department of Tourism, Culture and Sports.
- Department of Education and Universities.

PLANNING, WORKS AND INFRASTRUCTURES AND PROMOTION: TENERIFE ISLAND COUNCIL

- Department of Sustainability, Environment and Safety: granting of homologation of trails, authorizations for carrying out activities in the field of protected natural areas, building and maintenance of trails, information and environmental education.
- Department of Tourism, Internationalization and External Action. Trail building.
- Tenerife Tourism Corporation (SPET), Tenerife Tourist Board. Promotion.

BUILDING AND MAINTENANCE OF TRAILS, INFORMATION, ENVIRONMENTAL EDUCATION AND PROMOTION: TOWN HALLS

CANARY MOUNTAINEERING FEDERATION: granting of authorisation for the use of the signs established by Decree 11/2005, of February 15, which creates the Canary Trails Network and regulates the conditions for management, homologation and conservation of the trails in the Autonomous Community of the Canary Islands.

In addition, the European Ramblers' Association (ERA) brings together 59 organizations of walkers from 34 European countries, and is responsible, among other functions, for coordinating the network of footpaths/trails that crosses Europe in all directions, uniting nations and peoples. Tenerife is part of this network, linked to the E7 European footpath, a cross-border European route that leaves from Hungary and extends to Portugal, connecting Tenerife with the Great Route trail (GR 131).

Current Promotional Activity

- 'Tenerife Walking Festival, zero foot print: international hiking event. The third edition is held in 2017.
- Promotion and support for the celebration of ecotourism events and projects such as Turnatur and the Boreal Festival, among others.
- Specialised promotion through communication channels managed by the Tenerife Tourist Board, such as its website, brochures, the Infoten tourist information network, social networks, and so on.
- Actions included in the promotional brand 'Tenerife No Limits': attendance at trade fairs, press trips and fam trips and information addressed to federations and clubs in the main markets of origin.

Needs detected and the corresponding proposals for intervention

NEEDS	PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Lack of normative framework (in process) that causes a context of legal insecurity. ■ Insufficient administrative agility for obtaining and managing permits. ■ Conflicts with other activities and users that concur in the same space (use of mountain bikes (MTB), equestrian activities, quads, etc.). ■ Absence of spaces for dialogue between activities that share the same space for their development ■ Inter-administrative complexity to deal with certain aspects of hiking. ■ Necessary political decision to face the problems and the challenges that hiking presents. ■ Weakness of participatory strategies (or absence in certain cases) designed to manage activities and places related to hiking. ■ Availability of an agreed policy framework on active tourism 	<ul style="list-style-type: none"> ■ Availability of a participative and agreed regulatory framework on active tourism. ■ Promote an efficient management of licences. ■ Review response protocols of the administrations in the face of user, and particularly, company demands. ■ Prioritize uses and determine areas for exclusive practice from a spatial perspective. ■ Promote co-existence frameworks between hiking and other activities. ■ Encourage public-private management formulas for the trails. 	A_01
<ul style="list-style-type: none"> ■ Insufficient resources given over to maintenance of the support system (roads and trails). ■ Poor access to some of the available trails. 	<ul style="list-style-type: none"> ■ Give viability to proposals already formulated, but not developed. ■ Improve access zones to the trails and sign system 	A_02
<ul style="list-style-type: none"> ■ Lack of adequate signs and information on the level of difficulty of the trails. ■ Uneven level of sign-posting on an island scale. ■ Little development of proposals for circular walks. ■ Poor coordination of hiking activities with public transport. 	<ul style="list-style-type: none"> ■ Develop transport systems that aid the activity 	A_03
<ul style="list-style-type: none"> ■ The need to organise the present dispersion of the existing footpaths on the Island. ■ Insufficient adaptation of emblematic activities (ascent to El Teide, descent of the Masca ravine, among others) 	<ul style="list-style-type: none"> ■ Supply of complementary services (transport, supplies, logistics for the transfer of belongings when changing accommodation, etc.). ■ Conclude and organise, in a convenient way, the network of trails with an island focus and local projection. 	A_04
<ul style="list-style-type: none"> ■ Deficit of specialised information for the development of the activity. Information that, moreover, lacks accessibility criteria. ■ The communication and promotion of hiking, sometimes, does not respect the criteria of legality and sustainability that affect the environment where the activity is carried out 	<ul style="list-style-type: none"> ■ Improve available information (both online and in conventional formats: maps, panels, web, etc.). ■ Accessibility criteria applied to communication and promotion. ■ Promote greater knowledge and dissemination of the communication tools and instruments already available. ■ Specialised marketing and promotional plans for hiking 	A_05

Needs detected and the corresponding proposals for intervention

NEEDS	PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Insufficient innovative proposals (thematic trails, heritage information, combined products, etc.). 	<ul style="list-style-type: none"> ■ Provide a singular content of the trails offer, incorporating the natural, patrimonial, social, cultural and environmental values of the area in which the offer is located 	A_06 A_08
<ul style="list-style-type: none"> ■ Low integration of other tourist activities and productive functions 	<ul style="list-style-type: none"> ■ Promote the combination of various tourist activities in relation to hiking. 	A_08
<ul style="list-style-type: none"> ■ Overcrowding in certain places where the activity is practiced at certain times of day. ■ Insufficient monitoring of the trail network ■ Low awareness and environmental education of hikers about their impact on the environment (generation of waste, damage to heritage sites, among others). 	<ul style="list-style-type: none"> ■ Provide more information and training towards the awareness of hikers and the general population. ■ Design awareness strategies. ■ Reflect on the limits of the development of the activity in conditions of sustainability. 	A_08
<ul style="list-style-type: none"> ■ Insufficient impact on the generation of local employment 	<ul style="list-style-type: none"> ■ Promote specialised training in the field of hiking and its different dimensions for the promotion of local employment. ■ Integration of the activity with other business activities, tourism and other economic sectors in the zone. 	A_10
<ul style="list-style-type: none"> ■ Problems of civic education, generating an inappropriate use of resources. 	<ul style="list-style-type: none"> ■ Awareness-raising actions, both for tourists and for local citizens. ■ Education and early awareness for children 	A_10

ANNEX

03

Road cycling tourism

Relevant data of the activity

In Europe there are 2.3 billion bicycle trips each year, of which 20 million are tourist trips with associated overnight stays. The total economic return or, what is the same, the direct economic impact of cycling travel is estimated at € 44 billion, of which € 9 billion is tourism in the strict sense, i.e. associated overnight stays (Weston, et al., 2012).

The activity of cycling tourism has become specialised in Tenerife in the last two decades, passing from occasional cyclists to the most professional of riders today. The island attracts cyclists motivated by a combination of climate, the topographical features of the land and its interior landscapes, which are ideal for amateur cycling and professional training.

Data relating to demand

The data available from the *Tenerife Tourism Survey 2015-2016* (Tenerife Island Council) offers information on all types of cycling tourism, but not specific data for each modality.

Volume of demand

Approximately 2% -2.5% of the people who visit Tenerife go cycling during their stay, which leads to an annual number of users of around 90-120,000.

Economic contribution

The direct expenditure in the practice of cycling tourism gives the island an income estimated at four million euros, with an average expenditure of € 37-40 per person on the activity. This amount is included in a total holiday expense for the cycling tourist sector, estimated at around 93.3 million euros.

Visitor Profile

- The tourist who goes cycling in Tenerife is usually younger (44.5 years) than the average tourist visiting the island (48.7 years).
- Somewhat more than half travel in couples (52.9%), which is above the average for those who have come with friends, or those who have travelled alone. Also relevant in this sector are families with children. This variety of travel groups suggests the coexistence of a heterogeneity of cycling tourists.
- The largest markets in cycling are German and Belgian, although it also has relevance among the Italian, French and Dutch, as well as in the Finnish, the Swiss-Austrian and the Irish markets.
- In relation to the British market, its large tourist volume on the island means it has the highest number of cyclists percentage wise, although its relative share in this activity

is lower than its general tourist share because of the low propensity of British tourists to do this activity while on holiday in Tenerife. In any case, cycling is one of the most significant activities for this market.

- 52% of cyclists are repeat visitors on the island, with a high percentage of repeats in the last five years.
- Cycling tourists usually stay in the south, especially Costa Adeje, Las Americas-Arona and Los Cristianos. They can also be found in El Médano and in the interior areas of the South, although their numbers are lower.
- The average duration of their stay in Tenerife is around 10.41 days, higher than the average visitor (9.74 days).
- They use the Internet to organise their trip and to obtain information about cycling in Tenerife.
- They are active tourists, who in addition to cycling, do other activities such as hiking, adventure sports, surf-windsurf-kitesurfing or diving. They also visit the island's tourist attractions more frequently than the average visitor.
- They rent a car during their stay.
- They spend more than the average tourist.
- They are motivated by Tenerife's climate, its tranquility, the natural environment, the sea and the activities and leisure that it offers. 7.5% mentioned cycling as the main reason for choosing the island.
- For this tourist sector, the environmental and landscape aspects, as well as the road infrastructure, the sign-posting and the recreation area are especially important, and we must pay special attention to them.
- They contribute as a suggestion the necessary implantation of cycle lanes and the improvement of the roads on Tenerife, both for the importance of mobility as for the use that they make of the roads when cycling.

Data relating to the offer

Resources

- Excellent climatic conditions that allow cycling all year round
- The altitude (Teide National Park): a factor of the first order for professional sports training (professional teams).
- Diversity of landscapes and routes, since the geography of the island allows different types of trainings and routes.
- Potential for development of the road network and tracks, as well as in areas of both coast and mid-altitude.

Companies

More than twenty companies are registered in this sector, including rental shops, guide companies, training, and so on. About ten of these companies are associated with the 'Tenerife No Limits' brand.

Infrastructure

An extensive network of roads ranging from sea level up to an altitude of two thousand meters, passing through numerous Protected Natural Areas that are well-equipped for rest and recreation:

TIPO	Nº	Within Protected Natural Area	Connected with footpaths
Caravan parks	4	1	2
Hostels	2	2	2
Mountain shelters	1	1	1
Parador Nacional	1	1	1
Camping Zones	20	14	10
Campsites	4	4	4
Recreation zones	52	20	18
Viewpoints	70	-	-

Source: Environmental Department. Tenerife Island Council

In addition, the Strategic Framework for Island Development (MEDI) 2016-2025 includes among its programmes of action the Programme 3.3 for Improvement of Cycling Routes.

Legal and jurisdictional orders that regulate the activity

Bicycle tourism, as an activity to be carried out on the road system, is regulated by various municipal ordinances and traffic regulations.

As a tourist activity it should also be taken into account:

- Law 7/1995, of April 6, on Tourism Planning in the Canary Islands.
- Decree on guides 88/2012, dated 15 November, amending Decree 13/2010, of February 11, regulating the access and exercise of the profession of Tourism Guide in the Autonomous Community of the Canary Islands.
- Tourism intermediation decree 37/2014, of May 9, which modifies Decree 89/2010, of July 22, regulating the activity of tourist intermediation.

- Transport Decree 72/2012, 2 August, approving the Regulations for the development of Law 13/2007, 17 May (BOC 104, 24.5.2007, BOE 143, 15.6.2007), of Road Transport Planning of the Canary Islands.

- Permits for the development of the activity in Protected Natural Areas. Each of which has a management tool that regulates the uses and activities that can be carried out in that area.

The Government of the Canary Islands, through the General Directorate of Tourism Promotion and Regulation, made public, on April 21, 2017, the Draft Decree approving the regulation that establishes the legal regime for the development of active tourism.

Authorities

REGULATIONS: GOVERNMENT OF THE CANARY ISLANDS

- Department of Public Works and Transport.
- Department of the Environment: drafting of plans and regulations for protected natural spaces.
- Department of Tourism, Culture and Sports.
- Department of Education and Universities.

PLANNING, WORKS AND INFRASTRUCTURES AND PROMOTION: TENERIFE ISLAND COUNCIL

- Island Department of Mobility and Development.
- Tourism, Internationalization and External Action.
- Tenerife Tourist Board.

Current actions to improve the activity

Currently there is a technical working group formed by the Department of Roads and Mobility of the Tenerife Island Council, TITSA and the Tenerife Tourist Board, which has been operating since 2010 and in which, in a coordinated way, joint projects are developed or measures of common interest are prioritised, among other actions.

The revitalising of business carried out in previous years and the joint analysis with the private sector has helped to prioritize road improvement, sign-posting, etc., which has been included in the MEDI.

Current Promotional Activity

- Promotion through the channels of communication of the Tenerife Tourist Board: web, brochures, Infoten, et cetera.
- Activity promoted through the promotional brand 'Tenerife No Limits'.
- Actions with press and specialised tour operators.
- The network of cycle routes is promoted through the webtenerife.com portal

Needs detected and the corresponding intervention proposals

NEEDS	PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ The activity presents many administrative difficulties that are not easily solved 	<ul style="list-style-type: none"> ■ Strengthen support for local business, both in administrative procedures and specific actions 	A_01
<ul style="list-style-type: none"> ■ Lack of infrastructure and facilities. ■ Some existing infrastructure in deficient state. 	<ul style="list-style-type: none"> ■ Improve existing road structure and facilities. ■ Specific use of new road infrastructure. ■ Sign-posting and information on cycle routes. ■ Define in the short term some safe routes. ■ Establish a network of associated accommodation and businesses. 	A_02 A_03
<ul style="list-style-type: none"> ■ Insufficient specialised accommodation for the activity 	<ul style="list-style-type: none"> ■ Encourage business and joint work to provide knowledge and projects in common like "Not only beds" to adapt the accommodation offer (services such as massage, physiotherapy, etc). 	A_02
<ul style="list-style-type: none"> ■ Insufficient plans, infrastructure and equipment to motivate bicycle use. ■ Tenerife is currently an island taken over by the private car and despite all types of studies no-one has come up with or implemented a model of mobility. ■ There is a lack of information about sustainable mobility in Tenerife. 	<ul style="list-style-type: none"> ■ A service is proposed to follow up all the different sustainable Urban Mobility Plans that several Town Halls have carried out (many used subsidies from IDEA for this purpose) in order to put them into operation. Urban infrastructure is essential for the bicycle. ■ Promote a new sustainable mobility model at island and municipal level 	A_03
<ul style="list-style-type: none"> ■ Problems in the transport system that do not help the correct carrying out of the activity. ■ Transporting bicycles could be a problem for visitors. 	<ul style="list-style-type: none"> ■ Continue the line of improvements in TITSA, making bike transport easier (bike racks, etc.). ■ Study formulas such as airline discounts or storage in the destination. ■ Implementation of complementary services (transport, parking, food, logistics for transfer of belongings to other accommodation; etc.) 	A_03
<ul style="list-style-type: none"> ■ Information and promotions with very little specialisation 	<ul style="list-style-type: none"> ■ Try to hold a prestigious cycling event to In Tenerife ■ Study combinations of different packages e.g. Bike-hotel with flight, with insurance, with bike hire, with bike transport, etc. ■ Work with the Federation for possible promotions ■ Specialise the promotional content and targets ■ Highlight the guarantees that the Canary Health Service offers 	A_05
<ul style="list-style-type: none"> ■ Lack of innovation in the development of the activity 	<ul style="list-style-type: none"> ■ Provide support infrastructure for new technologies, such as WIFI points on routes 	A_06
<ul style="list-style-type: none"> ■ Lack of social awareness with regard to cycling 	<ul style="list-style-type: none"> ■ Educational projects for schools and colleges ■ Awareness campaigns directed at the general public so they see the cyclist as an ally. ■ Road safety aimed at drivers. ■ Language training for professionals related to the activity 	A_10

ANNEX

04

Mountain bike tourism

Data relating to demand

The data related to the tourist demand for mountain biking are included in the general data already detailed in the Road Cycle Tourism Annex, because no differentiated data is available.

Data relating to the offer

Resources

Tenerife has an important network of forest trails where this activity can be done. The network stretches for more than 2,000 km, distributed, for the most part, through the Corona Forestal Natural Park.

Within this network there are more than 200 km of well-marked forest trails belonging to the Forest Trail Network for Mountain Bikes and Horses (BICA) on which you can go mountain biking. They connect the island from north to south, and at the same time they are composed of different variants and derivations that allow an infinite number of possibilities of routes, as well as enjoying a wide variety of landscapes.

This is compounded by the favourable climatic conditions on the island, which means the activity can be done throughout the year.

The routes that make up the BICA network are the following:

- BC-1 Northern Forest Route.
- BC-2 Mount of La Esperanza.
- BC-3 Chío pinewoods.
- BC-4 Southern pinewoods and black volcanoes.
- BC-5 Pinewoods of Vilaflor.

Business Offer

There are approximately twenty companies that offer this activity among which are predominantly multi-adventure companies, which also offer other outdoor nature activities.

Infrastructure

In addition to the network of forest trails, the Protected Natural Areas have an excellent network of facilities for rest and recreation.

Type	Nº	Within protected nature areas	Connected with trails
Campings	4	1	2
Hostels	2	2	2
Mountain shelters	1	1	1
Parador Nacional	1	1	1
Camping zones	20	14	10
Campamentos	4	4	4
Recreational zones	52	20	18
Viewpoints	70	-	-

Source: Environmental Department. Tenerife Island Council

The Strategic Framework for Island Development (MEDI) 2016-2025 includes actions that will influence the improvement of this activity in the following programmes:

- 4.7 Tourism Product Improvement Programme.
- 5.2 Programme for the Public Use of the Natural Environment.
- 5.4 Teide National Park.
- 5.5 Teno Rural Park.
- 5.6 Anaga Rural Park

Legal and jurisdictional orders that regulate the activity

This tourist activity is affected by the following regulations:

- Law 7/1995, of April 6, on the Management of Tourism in the Canary Islands.
- Decree 11/2005, of February 15, establishing the Canary Trail Network and regulating the conditions for the management, homologation and conservation of trails in the Autonomous Community of the Canary Islands (BOC 41, 28.2.2005).
- Decree on guides 88/2012, dated 15 November, amending Decree 13/2010, of February 11, regulating the access and exercise of the profession of Tourist Guide in the Autonomous Community of the Canary Islands.
- Tourism intermediation decree 37/2014, of May 9, which modifies Decree 89/2010, of July 22, regulating the activity of tourist intermediation.
- Transport Decree 72/2012, 2 August, approving the Regulations for the development of the Law 13/2007, 17 May (BOC 104, 24.5.2007, BOE 143, 15.6.2007), of Road Transport Planning in the Canary Islands.
- Permits for the development of the activity in Protected Natural Areas, each of which has a management tool that regulates the uses and activities that can be carried out in that zone.

Authorities

REGULATIONS: GOVERNMENT OF THE CANARY ISLANDS

- Department of the Environment: drafting of plans and regulations for protected natural areas.
- Department of Tourism, Culture and Sports.
- Department of Education and Universities.
- Department of Public Works and Transport

PLANNING, WORKS AND INFRASTRUCTURES AND PROMOTION: TENERIFE ISLAND COUNCIL

- Sustainability, Environment and Safety: granting of authorisations for activities and works in protected natural areas.
- Tourism, Internationalization and External Action.
- Island Department of Mobility and Development.
- Tenerife Tourism Corporation (SPET), Tenerife Tourist Board. Promotion.

The Government of the Canary Islands, through the General Directorate of Tourism Planning and Promotion made public, on April 21, 2017, the Draft Decree approving the regulation that establishes the legal regime for the development of active tourism activities.

Current product improvement actions

- Operability and continuity of the Technical Working Group on Tourism and the Environment.
- Actions envisaged in the MEDI.

Current Promotional Activity

- Actions included in the annual action plan of the 'Tenerife No Limits' brand.
- Activity included in the Map of tourist activities in nature.
- Official Tenerife tourist website: www.webtenerife.com

Needs identified and the corresponding intervention proposals

NEEDS	PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Lack of regulatory framework (in process) which causes legal insecurity. ■ Insufficient administrative agility to obtain and process licences. ■ Conflicts with other activities which occur in the same area (hiking, horse riding, jeeps, quads, etc.). ■ Absence of dialogue between activities that share areas. ■ Intra and inter-administrative complexity to resolve certain aspects of mountain biking. ■ Necessary political decision to face the problems and the challenges of the increase of mountain bike tourism activities (MBT). ■ Weakness of participatory strategies (or absence of them in certain cases) that are designed to manage activities and places related to mountain biking. 	<ul style="list-style-type: none"> ■ Availability of an agreed policy framework on active tourism. ■ Review the response protocols of administrations to the demands of users and particularly of companies. ■ Prioritize uses and determine areas for exclusive practice from a spatial perspective. ■ Promote frameworks of coexistence between mountain bike and other activities. ■ Promote public-private management formulas of the trails used for mountain biking. 	A_01
<ul style="list-style-type: none"> ■ Insufficient resources destined to the maintenance of the infrastructure that gives support to the activity (roads and tracks). ■ Inadequacy of many of the areas of access to the roads available for mountain biking ■ Low number of routes for certain types of cyclists 	<ul style="list-style-type: none"> ■ To dedicate specific routes for the use of mountain biking in its different modalities, particularly for descent (review adaptation of roads, or paths in unprotected natural spaces). ■ To develop viable tracks, like long circuit-routes for mountain biking. ■ Improvement of the access points to the tracks (routes authorised for the activity), also promoting their sign-posting. ■ Adaptation of accommodation to specialise in this sector. ■ Improve the island's asphalted roads and the forest tracks that are used for the activity. ■ Disable specific trails for the development of mountain biking in some of the modalities that have more difficulties in finding suitable routes. ■ Explore the development of the activity in areas that do not coincide with protected areas in their different variants. ■ Implementation of proposals already formulated for the development of different modalities of the activity. ■ Complete and organise, in a convenient way, the network of tracks that can be used for the development of mountain biking in its different modalities ■ To promote the development of parks with specialized circuits for the practice of mountain biking 	A_02

Needs identified and the corresponding intervention proposals

NEEDS	PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Lack of adequate signs and information on the level of difficulty of the available routes. ■ Uneven level of sign-posting on an island scale. ■ Poor interaction between mountain bike activity (MTB) and public transport. ■ Failure to adapt transport for the movement of material. 	<ul style="list-style-type: none"> ■ Develop transport systems that help organise the activity and which are adapted to carrying it out. 	A_03
<ul style="list-style-type: none"> ■ Little development of MBT modalities. ■ Fragmented demand, made up of multiple variants 	<ul style="list-style-type: none"> ■ Implementation of complementary services (transport, parking, supplies, logistics for the transfer of belongings when changing accommodation, etc.). ■ Take advantage of cycling events organised by local and island clubs. 	A_04
<ul style="list-style-type: none"> ■ Insufficient innovative proposals (thematic itineraries, heritage information, combined products, etc) 	<ul style="list-style-type: none"> ■ Specialisation of the offer. 	A_06
<ul style="list-style-type: none"> ■ Disconnection between the promotion of the activity and the development of an adequate offer. ■ Deficit of specialised information for the development of the activity. Information that, moreover, lacks accessibility criteria. ■ The communication and promotion of the activity, sometimes, does not respect the criteria of legality and sustainability that affect the environment where the activity is carried out. 	<ul style="list-style-type: none"> ■ Improve available information (both online and in conventional formats: maps, panels, webs, etc.). ■ Promote greater knowledge and dissemination of the facilities and tools already available. ■ Adapt the level of promotion to the progressive development of the product or activity. ■ Improve the marketing of the MTB product. ■ Strengthen the Central European tourist market. 	A_05
<ul style="list-style-type: none"> ■ Diversity of modalities. ■ Low compatibility with other tourist activities. ■ Insufficient monitoring of the network of tracks and trails. ■ Poor awareness and lack of environmental education among cyclists about their impact on the environment (deterioration of traditional trails, generation of waste, the impact on vegetation, damage to heritage sites, etc 	<ul style="list-style-type: none"> ■ Orient information and training towards the awareness of cyclists and the general population. ■ Design awareness strategies. ■ Reflection on the limits of the development of the activity in conditions of sustainability. 	A_08 A_10
<ul style="list-style-type: none"> ■ Insufficient repercussion on the generation of local employment. 	<ul style="list-style-type: none"> ■ Promote specialised training in mountain biking and its different dimensions for the promotion of local employment. ■ Integration of the activity with other business and tourism activities and other economic sectors, characteristic of or present in the area 	A_10
<ul style="list-style-type: none"> ■ Problems of civic education, generating an inappropriate use of resources. 	<ul style="list-style-type: none"> ■ Awareness-raising actions, both for tourism and for citizens. ■ Education and early awareness for children 	A_10



Relevant data of the activity

Tenerife holds great attraction for tourists who play this sport, as they find here a complete infrastructure at their disposal. There are nine courses integrated in the 'Tenerife Golf' Brand (eight in Tenerife plus the Tecina golf course in La Gomera); and a wide range of first class accommodation with specific services for golfers. In addition to all this, is a destination with many complementary leisure options, from beaches spreading from north to south to exceptional nature. And always with an enviable climate 365 days a year.

Data relating to demand

Data from the *Golf in Tenerife Report 2016* (Tenerife Tourist Board) and the Survey on tourism that visits Tenerife 2015-2016 (Tenerife Island Council).

Volume of demand

In 2016 the island had just over a hundred thousand golfers, who played a total of 324,475 rounds, 4.5% more than in the previous year. 74% of the green fees correspond to non-resident players and 26% to resident players, both Spanish and of other nationalities.

Economic contribution

These are tourists who stand out for their spending. The 131 million euros spent on their holiday accounted for 3.2% of the income received by the tourist destination. If we stick exclusively to the playing of golf, this generated an income of 19.3 million euros, with an average expenditure of 186 euros per person. This represents almost 8% of the island's income from tourism activities.

Visitor Profile

- Provenance: mainly from the United Kingdom, Germany and Spain. Also worthy of mention are other markets such as Sweden, France, Belgium, Finland, Italy and Switzerland.

- Golf Costa Adeje, with twenty-seven holes, is the course that sells the most green fees in Spain, with 87,139 starts in 2016.

- Golfers prefer to stay in four and five-star hotels.

- They usually stay on the island for eleven days, almost two days more than the average visitor.

- The average age of players of this sport is 53, surpassing the average of those who visit us (48.7 years).

- The average family income is 37% higher than that of the average visitor.

- More than half of the tourists who play golf travel as a couple to Tenerife, as well as in groups of friends.

- Golfers are also some of the most loyal to the destination, with 75.4% of them making repeat visits.

- The main motivations for travelling to Tenerife include climate, golf courses (design, maintenance and friendliness of staff), safety and gastronomy.

- Golf tourists, in addition to playing this sport, also take part in other activities during their stay, such as: sailing, health treatments or diving. They also combine this sport with visits to places of tourist interest.

- They tend to book the flight and accommodation services for their Tenerife vacation independently. Their knowledge of the destination, given the high level of repeat visitors and the fact that many of them have accommodation, favours this way of organising the trip.

- It is the activity that spends the most per person per day of all those carried out in Tenerife.

Data relating to the offer

Business Offer

'Tenerife Golf', created in 1999, is the brand of the Tenerife Tourist Board responsible for promoting the island as a destination for the playing of this sport. It brings together Tenerife's golf courses (plus Tecina Golf in La Gomera), seventeen hotels, as well as a receptive agency, a specialised store and a transport company. These are the twenty-nine companies that currently make up this brand:

- Abama Golf.
- Golf Costa Adeje.
- Golf Las Américas.
- Golf Los Palos.
- Golf del Sur.
- Real Club de Golf de Tenerife.
- Buenavista Golf.
- Amarilla Golf.
- Tecina Golf (La Gomera).
- The Ritz-Carlton, Abama.
- Hard Rock Hotel.
- Hotel Suite Villa María.
- Sheraton La Caleta Resort & Spa.
- Iberostar Grand Hotel El Mirador.
- Hotel Bahía del Duque.
- Iberostar Anthelia.
- Hotel Jardín Tropical.
- Hotel Sir Anthony.
- Hotel Las Madrugueras.
- Sensimar Arona Gran Hotel & Spa.
- Paradise Park Fun Lifestyle Hotel.
- Vincci Tenerife Golf.
- Sandos San Blas Nature Resort & Golf.

- Golfamax.
- The Players Golf Shop.
- Orobus.
- Hotel Botánico.
- Meliá Hacienda del Conde.
- Hotel Jardín Tecina (La Gomera)

Infrastructure

CURRENT OFFER OF GOLF COURSES IN TENERIFE

- Abama Golf (18 holes).
- Golf Costa Adeje (27 holes).
- Golf Las Américas (18 holes).
- Golf Los Palos (9-holes, 3 par).
- Amarilla Golf (18 holes + 9-hole Pitch & Putt).
- Golf del Sur (27 holes).
- Real Club de Golf de Tenerife (18 holes).
- Golf La Rosaleda (9-hole, Pitch & Putt).
- Buenavista Golf (18 holes).

NEW OFFER OF GOLF COURSES

At present, there are projects under study for six new eighteen-hole golf courses, two expansions of existing ones with nine holes, and a Pitch & Putt.

Current Promotional Activity

- Efforts to make this activity popular in all seasons.
- Creation of tourist packages.
- Attendance at professional tournaments and specialised trade fairs.
- Online promotion on golf portals.
- Press and fam trips to the Island.
- Organisation of Golf Circuits.
- Specific social networks of 'Tenerife Golf': Facebook and Twitter.

Needs identified and the corresponding intervention proposals

NEEDS	PROPOSALS	AXIS
<ul style="list-style-type: none"> Territorial Planning of Golf Courses. 	<ul style="list-style-type: none"> Sports facilities, covered in the general planning and environmental legality, are subject to the corresponding evaluation procedures. Although golf facilities have generally followed the same procedure as general facilities, for some years now some Autonomous Communities have opted to generate special and additional regulations under their jurisdiction in matters of spatial planning, the environment, tourism and sport. These autonomous regions are the Balearic Islands (1988, 1990, 2000), Extremadura (1990), Navarra (1992), Comunidad Valenciana (2006) and Andalucía (2008) 	A_01
<ul style="list-style-type: none"> Regulation of golf facilities by the Canary Island authorities. 	<ul style="list-style-type: none"> It is necessary that both the Tenerife Island Council and the Autonomous Community of the Canary Islands regulate the construction of golf courses. 	A_01
<ul style="list-style-type: none"> Design of new strategic projects in Tenerife 	<ul style="list-style-type: none"> A quality tourist destination requires that the designs of the new courses are done by prestigious designers, thus adding an additional value to the offer 	A_02
<ul style="list-style-type: none"> Incentives for improvements in sustainability. 	<ul style="list-style-type: none"> Sustainable improvements in energy saving, especially water and electricity. For example: buggies with solar roofs. Obtaining environmental management certificates such as ISO or EMAS, as the Balearic Government does on its golf courses. Installation of desalination plants. Currently two courses on Tenerife have their own desalination plant: Abama Golf and Buenavista Golf. 	A_08

ANNEX

Gastronomy

Relevant data of the activity

The local gastronomy is a basic element of the culture and way of life of a given population; it bears close relation with the characteristics and the climate of the territory where it is produced, besides being one of the factors that has shaped its history and heritage.

In Tenerife, through different plans and projects, the cuisine has been one of the main standard bearers of culture and local identity in its link with tourism.

Since 2000, different initiatives promoted by the Island Council, or in collaboration with other entities and companies, have succeeded in positioning the island as a destination with a gastronomic richness recognised internationally for the quality and differentiation of its local produce, much of it with certificates of quality and numerous awards, such as wines, honeys and cheeses, among other products. There are professionals and companies in this sector who have also received awards. It is worthy of mention that the five Michelin stars awarded in the Canary Islands are all in Tenerife.

Data relating to demand

Gastronomic tourism is one of the sub-sectors that is growing the most in Spain and which has great capacity to attract international tourism. In the year 2015, some 8.4 million tourists (12.3% of the total international tourists that Spain received) participated in some activity related to gastronomy, according to data from the World Tourism Organization (WTO).

The Autonomous Communities that attract the most gastronomic tourists are Andalusia (34%), Catalonia (22%) and Madrid (16%). The main visitors are from France, which represents 22% of the total, the United Kingdom, 20% and Germany 11%.

Regarding Tenerife, 5.3% of the people who visited the island in 2015 cited the cuisine among the main reasons for choosing the island as a holiday destination, and this has been gaining in appeal in recent years.

With regard to the consumption of gastronomic products by tourists, 65.7% mentioned having tasted some local product or dish during their stay. The products or typical dishes mentioned and their importance are as follows:

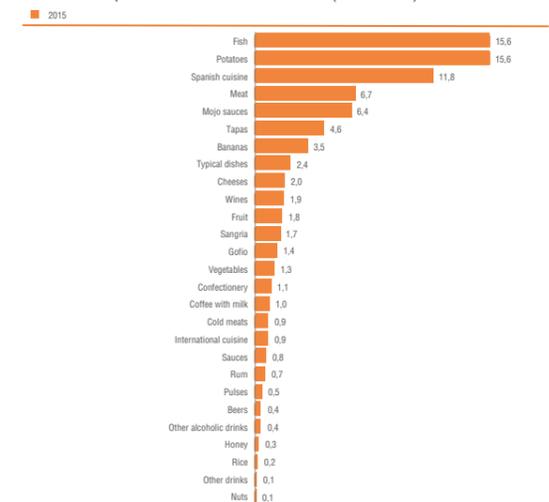
- Fish and potatoes, both consumed by 15.6% of the tourists, are the most consumed products and, as has been seen, are also the products most associated with the island.
- Meat (which was placed in eighth position as a foodstuff associated with Tenerife) is, however, the fourth most tasted product. 6.7% of the tourists have eaten it, especially rabbit, chicken, goat meat, lamb or fried pork.
- Mojo and mojo picón sauces have been tried by 6.4% of tourists.

■ As for the banana, as already explained in previous editions, although it is a product closely associated with Tenerife (16.6%), it has only been consumed by 3.5% of tourists during their stay. The same happens with other fruits and vegetables, foods that are much more relevant to the image of the island's gastronomy than in their effective presence in tourist consumption.

■ On the contrary, the typical dishes (in spite of their low association with Tenerife) are gaining relevance. The same happens with other foods such as cheeses, which are among the ten most eaten products.

■ Traditional Spanish food is also mentioned, and is, of course, part of the island's offer.

Traditional products and dishes tasted (% tourists)



Fuente: Encuesta de Imagen y competitividad- Cabildo Tenerife. Elaboración: Turismo de Tenerife

Data relating to offer

Resources

LANDSCAPES

The special geographic and climatic conditions of Tenerife have led to numerous agrarian systems associated with crops. The landscape of important agricultural regions of the island have been shaped by these crops, as well as uses and traditions that today form part of our ethnographic and cultural heritage, together with a rich agricultural biodiversity. Giving importance to crops such as vines, apples, potatoes, onions, and so on, as well as the culture associated with them, implies the generation of an added value that is increasingly appreciated by consumers.

In this sense, tourist interest in gastronomy is to emphasise the value of the triple combination of local product-territory-culture.

MAIN LOCAL PRODUCTS

Among the great variety of local products that are grown or produced on the island, both primary and processed, we highlight the ones that tourism associates with the image of Tenerife, according to data extracted from the report *Local Gastronomy and Tourism in Tenerife, 2015* (Tenerife Tourist Board):

■ **Fish** is the main gastronomic product that is associated with Tenerife, something logical given its island condition and connection with the sea. It is mentioned by 70% of the people who visit us and grouped in this category are both fish in general and fresh fish, as well as some specific varieties being cited. The most mentioned were seafood followed by grouper, squid, parrot fish, octopus, sardines and shrimps.

■ **The potato** is the second product associated with Tenerife, especially salted, boiled potatoes and potatoes with mojo sauce.

■ **The banana**, separated from the category of fruit as an identity element, is the third most mentioned product, at 16.6%. However, this product has been losing its importance as an element of image with respect to previous years, above all in international markets.

■ **Spanish** cuisine is associated with the gastronomic image of Tenerife by 14.3% of tourists, in particular the international ones. Among the icons of Spanish gastronomy is paella, in addition to other typical dishes such as Spanish omelette or gazpacho.

■ **Fruit** is another product that also gets a notable mention for its association with the island. Those who visit us make mention of the fruit in general; although some specify varieties such as oranges, papaya, melons, mangoes, avocados or figs, among other fruits.

■ **Rabbit meat** is a dish that tourists discover during their stay and is among the ten most consumed. Also chicken and goat meat have climbed positions in consumption with respect to the island's image.

■ Canary **mojos** also occupy a prominent place in the image of island cuisine, with 11% associating it with Tenerife. Mojo picón, red mojo and green mojo are all mentioned.

■ **Tapas**, so popular in Spain, are mentioned by 7.7% of tourism.

■ **Sangria**, which is especially referred to by foreigners, occupies ninth position, ahead of wines, which are ranked eleventh (4.3%).

■ **Vegetables** are cited by 5.8% of visitors, with tomatoes and salads among the most mentioned.

■ **Gofio** (2.3%) and **cheese** (2%), products closely associated with the cuisine of the island by the local population, are hardly recognized by tourists, and are particularly unknown by foreign tourists.

■ **Alcoholic beverages** such as rum (especially honey rum), beer (especially lager), and other alcoholic beverages such as cocktails, mojitos or banana liqueurs are also recognised by tourists.

■ The **different types of coffees** (such as "barraquitos" and "cortados") also have their place in the gastronomic image.

■ 1.1% mentions **some typical dishes** such as stews and vegetable soups.

■ After them, with 1%, the **confectionery** (local cakes, quesillo, bienmesabe, jam).

■ Very low is the recognition of honey (0.4%). A product that has a formal Guarantee of Origin (D.O.P.) with validity throughout the territory.

■ Finally come sauces such as almogrote, alioli and salmorejo.

DESPITE NOT BEING PART OF THE GASTRONOMY:

■ Cold cuts, particularly ham, are cited by 1.1% of the people who visit Tenerife.

■ There are also some typical dishes of Spanish cuisine, as well as others of international gastronomy, readily on offer on the island.

Regarding Tenerife wines, there are five Guarantees of Origin, which ensures quality. This drink, appreciated by the local population but scarcely recognized by the people who visit us, is the result of a series of factors that give great singularity and differentiation to the island gastronomy: the unique sensorial qualities of the cultivation of the vine in volcanic soils; Multiple waves of colonisers and travellers from diverse geographical regions brought with them, centuries ago, a great diversity of grape variety accompanied by a wealth of agro-systems of really unique and varied cultivation. The vines in Tenerife, unlike other wine producing areas, have the peculiarity of being pre-phyloxeric, that is to say, the vine grows on its own root (foot) without needing to use grafting and this allows the varietal richness to manifest all its potential.

Business

■ 115 wineries, 40 of which can be visited.

■ Attractive range of high and medium-range restaurants:

- 12 restaurants recognized by the Michelin Guide (one with two stars, three with one star).

- 13 restaurants recognized by the Repsol Guide (four with two suns and nine with one sun).

■ Great offer of restaurants throughout the island, from traditional to creative and avant-garde cuisine.

■ Guachinches: given the huge popularity of this type of eating establishment for the people of Tenerife and its importance as a unique element of our tradition, efforts have been made by the island's governing bodies to establish its regulation.

■ Saborea Tenerife is a tourist product club belonging to the network of destinations associated with Saborea España and managed by the Tenerife Tourist Board. It is made up of entrepreneurs, associations, etc., linked to the gastronomy of the island and promotes participatory work, projects and promotion of the gastronomic wealth of the territory.

■ Other entities such as: Tenerife Rural Foundation, The Canary Association of Cooks and Confectioners (ACYRE), Eurotoques, among others.

Infrastructure

GASTRONOMIC CULTURE CENTRES LIKE LA CASA DEL VINO (THE WINE HOUSE) AND LA CASA DE LA MIEL (THE HONEY HOUSE)

La Casa del Vino La Baranda is an old Canarian hacienda of the XVII century, owned by the Tenerife island Council, dedicated to the promotion of the wines of the island. It houses inside the Island Museum of the Vine and the Wine of Tenerife.

The Casa de la Miel of the Tenerife Island Council is a centre that offers legally established beekeepers a range of services related to their activity.

INTERESTING FARMERS MARKETS:

- Nuestra Señora de África Market, Santa Cruz.
- La Laguna Market.
- Tacoronte Farmers Market.
- Tegueste Market.
- La Victoria Farmers Market.
- Farmers Market of Santa Úrsula.
- Farmers Market of San Miguel.
- Los Los Realejos Farmers Market.
- Farmers Market in La Orotava.
- Farmers Market of La Matanza de Acentejo.
- Agro-traditional Market of Playa San Juan.
- La Guancha Farmers Market.
- Farmers Market of Granadilla de Abona.
- Candelaria Farmers Market.
- Farmers Market of Arafo.
- Farmers Market of Santiago del Teide.
- Farmers Market of Fasnia.
- Adeje Agro-market

VISITS TO FARMS

Tenerife has a variety of farms with plantations such as Canary bananas, avocados, and so on, as well as dairies, wineries and craft companies which process local products that can be visited. Although the offer is still small, in recent years the adaptation of these establishments to the tourist market has been growing, offering routes, tastings, workshops, and so on.

SPECIALISED STORES

The important rise in the number of gourmet shops specialised in promoting local products highlights the interest in island cuisine.

VARIED OFFER OF GASTRONOMIC EVENTS

Such as the The Canary Island Food Show, Culinaria Tenerife, the sampling of local products, the tapa routes, culinary events and local festivals linked to food culture, for example, those of San Andrés.

Legal and jurisdictional orders that regulate the activity

■ DECREE 83/2013, of 1 August, regulating the activity of temporary marketing of homegrown wine and establishments where it is sold. Government of the Canary Islands.

■ DECREE 190/2011, of October 5, of the President, which corrects the material error of Decree 50/2011, of April 8, of the President, which establishes the formats and characteristics of the sign plates of establishments for tourist accommodation, catering and tourist intermediation. Government of the Canary Islands.

■ DECREE 50/2011, of April 8, of the President, which establishes the formats and characteristics of the distinctive sign plates of tourist establishments for accommodation, catering and tourist intermediation. Government of the Canary Islands.

Current product improvement actions

The Master Plan of Tenerife Gastronomy, currently in its final phase, will allow the integration and planning within the same framework the strategic and operational plans of the main entities and institutions that aim to improve the island's gastronomy.

This Master Plan highlights among its most relevant conclusions:

■ The scarce use of the integrated value chain of gastronomy as a strategic tool.

■ The necessary complicity between the primary sector and tourism: the primary sector contributes landscape, experiences and a variety of differentiated quality products. The gastronomy-tourism combination allows taking advantage of the opportunity represented by local products, producers, the territory and the landscape to give variety, quality and depth to the catalogue of gastronomic and tourist products, thus enriching the tourist image of Tenerife.

■ In spite of excellent resources, infrastructure, etc., there is hardly any commercialization of the experiences that are aligned with current trends in gastronomic tourism.

■ There are also clear problems of competitiveness, such as the lack of a standard sign system for gastronomic resources, obvious deficiencies in the field of professional skills (training), a low use of innovation and a great fragmentation of supply.

■ There has also been a perception of the risk of losing the gastronomic cultural heritage of the island: the banalization of gastronomy, the lack of transmission of memory (knowledge of the product, recipes and traditions).

■ Gastronomic heritage buildings have not been sufficiently valued.

■ On the other hand, Tenerife has not yet been perceived as a destination in which gastronomy plays an important role. This is due, among other factors, to the following:

- The poor culinary expectations of less informed visitors.
- Limited contact with the local cuisine during their stay on the island.
- The late and, still very scarce, incorporation of local gastronomy in hotel chains.
- The almost inexistence, until a few years ago, of the gastronomy in the promotional marketing of the destination (in Tenerife and in the markets of origin).

- Design a set of programmes aimed at improving competitiveness, innovation and the creation of culinary tourism products.
- Promote programmes of recovery and appreciation of the culinary heritage of Tenerife.
- Make more widely known the story of the gastronomy of the island and renew marketing strategies and communication.

Current Promotional Activity

- Promotion of gastronomy with the new offer, 'Tenerife Eating Experience', presented at Madrid Fusión (January 2017) through:
 - Showing of the promotional spot about gastronomy designed in January 2017.
- Seven video-recipes that combine: landscape, product and elaboration.
- Magazine of recipes and local products. Saborea Tenerife on Facebook.
- Participation in trade fairs and events organised by Saborea España.
- Culinary events that are held on the island.
- Gastronomic zone linked to the international walking event 'Tenerife Walking Festival'.
- Sponsorship and dissemination of culinary projects organised by municipalities to promote local products and rural landscapes.
- Organisation of gastronomic press trips.
- Promotion of regional cuisine contests

Needs detected and the corresponding proposals for intervention

Taking into account the conclusions drawn in the report on *Local Gastronomy and Tourism in Tenerife 2015*, the results of the work carried out in recent years, meetings for reflection with the business sector and those included in the draft of this Master Plan of Tenerife Gastronomy a series of strategic challenges are formulated to be taken into account in order to promote the gastronomy of the island:

- To propose a model of sustainable and responsible development of the triple combination tourism-gastronomy-primary sector of Tenerife.
- Promote a model of governance and align the strategic objectives of the different participants involved in the value chain of island gastronomy.
- Incorporate the concept of value chain in the formulation of the strategy and proposals of the tourism-gastronomy-primary sector.

Needs detected and the corresponding proposals for intervention

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Improve coordination among all sectors involved. ■ Encourage understanding, complicity and consensus among those involved in tourism and the island's primary sector. 	<ul style="list-style-type: none"> ■ Strengthen the Technical Working Group on Tourism and Agriculture and the cooperation with other public-private entities linked to gastronomy and the different sectors that compose it. ■ New model of tourism and gastronomy governance. 	A_01
<ul style="list-style-type: none"> ■ Contribute to maintaining the ethnographic heritage related to gastronomy, gastronomic production and the agricultural-livestock-fishing landscapes of the Island. ■ Give uniqueness, depth, variety and quality to the island tourist offer, highlighting the potential of the territory and local food products. 	<ul style="list-style-type: none"> ■ Signage and information about gastronomic heritage to give it tourist value. ■ Identify and plan the appropriate actions to introduce these heritage elements into the tourist market through routes and other tourist products. ■ Creation of routes and tourism products that link landscape, heritage, product, service, ... 	A_02 A_04
<ul style="list-style-type: none"> ■ Promote the image of Tenerife as a destination for fans of food and wines. ■ Make the island cuisine an argument for differentiation, quality and loyalty for publics with specific motivations. ■ Strengthen tourism promotion and renew marketing and communication tools for island cuisine. ■ Make known the quality and seasonal products of the island. 	<ul style="list-style-type: none"> ■ Brand strategy. ■ Marketing and communication plan. ■ Updating content and formats of marketing and communication tools ■ Plan of renewal and re-planning of gastronomic events. ■ Actions to promote and disseminate local production. 	A_05
<ul style="list-style-type: none"> ■ Protect and value the island's gastronomic culture: material and non-material cultural heritage, landscape, products, cuisine, festivals, and so on. 	<ul style="list-style-type: none"> ■ Programme of recovery and protection of the gastronomic culture of Tenerife. 	A_08
<ul style="list-style-type: none"> ■ Promote innovation in gastronomy and its link with the tourism sector. 	<ul style="list-style-type: none"> ■ Innovation applied to the incorporation of local products to the gastronomy of the tourist sector (for example, accommodation). ■ Innovation applied to the presentation of culinary products. ■ Plan of competitiveness for the gastronomy of Tenerife. ■ Programme of R & D & I actions. 	A_06
<ul style="list-style-type: none"> ■ Improvement in the competitiveness of the value chain of gastronomy. 	<ul style="list-style-type: none"> ■ Give impulse to knowledge, training in R & D & I. ■ Plan of transfer of R & D & I to the value chain of the gastronomy of Tenerife. 	A_07

Needs detected and the corresponding proposals for intervention

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none">■ Need for requalification in the different sectors that compose gastronomy.■ Sensitise the primary sector to the importance of gastronomy in visiting a destination.■ Awareness raising and sensitisation of the wealth and identity of our gastronomy and transmit the importance of gastronomy as a tool to achieve sustainable and responsible tourism to the local population.	<ul style="list-style-type: none">■ Carry out training actions to promote knowledge of local products, as well as marketing and sales techniques.■ Plan of communication and awareness of the importance of the value of local products and gastronomy for the tourist.■ Promote knowledge and recognition of the quality of our local products, our landscapes, ethnographic heritage and in general our cuisine.■ Recognition and protection of the gastronomic culture of the island of Tenerife	A_10



Relevant data of the activity

Tenerife offers a wide range of possibilities for surfing and bodyboarding on suitable beaches both in the north and in the south of the island. To this is added the mildness of the climate throughout the year and a water temperature that also allows these sports to be done in winter, something that in other European countries is not possible.

Data relating to demand

Data elaborated by the Tenerife Tourist Board from the *Survey on tourism that visits Tenerife 2016 (Tenerife Island Council)*.

Volume of demand

1.2% of the tourism that visited the island in 2016 engaged in this activity, which places demand at around 56,000 users.

Economic contribution

The tourism from this sector generates an estimated amount of 48 million euros in spending while on holiday in Tenerife. The direct economic impact of surfing is estimated at about 3 million euros, with an average expenditure of €48 per person on the activity.

Visitor Profile

- The main markets that stand out are the Italian, German, Spanish, British, Swiss, Austrian, Irish and Russian.
- Surfing tourists are young.
- They usually travel with friends or alone.
- They tend to stay in private accommodation or holiday accommodation, although some stay in more conventional accommodation.
- Tourism with a high use of the Internet, both to organise the trip and to search for information about the sport.
- 19% choose Tenerife specifically for these sports.
- Other important factors in their decision were: the sun, nature, the landscapes, the coast of the island (sea and beach), as well as visits to family or friends.

Data relating to the offer

Recourses

- There are thirty-three spots identified as having good waves for surfing all over the island, with the sport carrying on throughout the year.
- Thanks to low Atlantic pressure during the winter (October-April) and the influence of the trade winds during the summer (May-September), Tenerife is the ideal place for surfing in all its forms.
- The waves break on different types of seabed: rocks, rocks and sand, sand, or volcanic reef. The waves on the sea beds of sand and rocks are usually more accessible breakers, suitable for beginner and intermediate level surfers. Volcanic reefs present more difficulty, so they are more appropriate for those who master the technique perfectly.
- The water temperature ranges from 19 degrees in winter to 26 degrees in summer.

Business Offer

According to data from the Canary Island Surf Federation, there are nineteen official schools (many of them registered as tourist companies).

Infrastructure

It is an activity that does not require specific infrastructure beyond access to the sea. Some improvements are requested from the federation such as: access improvements, small-scale facilities to help store boards, changing rooms, and so on.

Legal and jurisdictional orders that regulate the activity

- Law 22/1988, of 28 July, of Coasts (LC) and Royal Decree 876/2014, of October 10, approving the General Coastal Regulation (CR), in relation to seasonal services on beaches. (Arts 53 LC and 113 and ss.) Preferential authority of town halls, unless they show no interest in the announcement made by the Peripheral Coastal Service in the last three months of the year.
- Royal Decree 62/2008, of 25 January, which approves the Regulation of the conditions of maritime safety, sailing and human life at sea applicable to nautical concentrations of commemorative character and water sport events.
- Resolution of February 7, 2012, of the Presidency of the Higher Council of Sports, which publishes the training plan for the sports surfing modality within the framework of what is established in Royal Decree 1363/2007, of 24 October, which regulates the general planning of sports instruction of a special nature or its equivalent at European level, the qualifications being duly recognized by the legal system of the country of origin.

Ministry of Education, Culture and Sports.

- If the activity is carried out in a Protected Natural Area on the coast, it will be affected by the corresponding planning order, which is the responsibility of the Tenerife Island Council.

As a tourist activity, it should also be taken into account:

- Communication of tourist activity to the Directorate General of Tourism Planning and Promotion. Art. 13.2 a) of Law 7/1995, of 6 April, on the Planning of Tourism in the Canary Islands.
- Decree 37/2014 of 9 May, amending Decree 89/2010, of 22 July, regulating the activity of tourist intermediation. Responsibility of the Department of Tourism, Culture and Sports of the Government of the Canary Islands
- Authorisation of complementary private transport by the Island Council. Law 13/2007, of May 17, on Road Transport Planning in the Canaries and Decree 72/2012, 2 August, approving the Regulations for the development of Law 13/2007, May 17, on Road Transport Planning in the Canaries.

The Government of the Canary Islands, through the General Directorate of Tourism Planning and Promotion, made public on April 21, 2017, the Draft Decree approving the regulation that establishes the legal regime for the development of active tourism activities.

Current product improvement actions

The Island Council Department of Sports has launched the 'Tenerife + Azul' project with the aim of contributing to the promotion of an economic sector and knowledge related to the sea, as well as collaborating in the positioning of the island as a reference destination in the field of national and international sport through the organisation of sporting events.

This project, together with 'Tenerife and the Sea', both included in the Strategic Multi-Annual Framework of Actions for the Development of Tenerife 2016-2025 (MEDI) contains measures to improve the product, both in relation to accesses and also information, communication and promotion of the activity.

Current Promotional Activity

The activity is included in the island promotional framework specialised in active tourism, 'Tenerife No Limits'.

It includes detailed information on areas where it is carried out and the associated business offer on the website www.webtenerife.com, as well as on the map of water sports.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Necessity of regulations in the sector that include, among others, water sport activities (Active Tourism Decree). 	<ul style="list-style-type: none"> ■ Promotion of the Decree regulating the activities of active and complementary tourism in the Autonomous Community of the Canary Islands. 	A_01
<ul style="list-style-type: none"> ■ Planning of uses on beaches. ■ Increase in areas for surfing. ■ Improvement of facilities and complementary services for this tourist sport. 	<ul style="list-style-type: none"> ■ Beaconing and signalling zones for different uses and activities on the beaches. ■ Improve access to beaches, wave rehabilitation projects and artificial reefs. ■ Placement of information panels with standards of conduct, safety and respect for the marine environment. 	A_02

ANNEX

Windsurfing and Kitesurfing

Relevant data of the activity

The leeward wind system, marked by its great strength and constancy, turns the coast of El Médano into an ideal enclave for the practice of windsurfing or other water sports with sails.

Data relating to demand

Data collected by the Tenerife Tourist Board from the *Survey on tourism that visits Tenerife 2016* (Tenerife Island Council).

Volume of demand

These sports are done by 0.7% of the tourism that visited the island in 2016, which places demand at around 36,000 users.

Economic contribution

This sector generates an estimated 29 million euros from total tourist spending. The direct economic impact of windsurfing is estimated at about 2.3 million euros, with an average expenditure of €74 per person on the activity.

Visitor Profile

- Main markets: Italian, French, German, Belgian, Finnish, Norwegian and Russian.
- Tourists with high family income.
- A reduced use of conventional accommodation compared with the average, with accommodation in private homes being popular.
- One of the activities with a greater number of new visitors.
- The main motivation for travelling to Tenerife is to do the sport, in addition to the enjoyment of the sun, nature and the coast.
- The tourists' main demands for improvement are related to prices, professionalism, information and the organisation of the activity itself.

Data relating to the offer

Resources

The beach at El Médano (municipality of Granadilla), due to its wind conditions.

Business Offer

The business offer is concentrated at the beach of El Médano (Granadilla). Currently, it is estimated that there are more than a dozen companies that offer services related to the activity.

There has been a significant increase in "intruder" instructors and illegal businesses.

Infrastructure

The Strategic Framework for Island Development (MEDI) 2016-2025 includes some measures that will improve this activity, such as beaconing and information panels, in the following programmes:

- 4.6 Tenerife and the Sea.
- The Tourism Product Improvement Programme.

Legal and jurisdictional orders that regulate the activity

- Law 22/1988, of 28 July, of Coasts (LC) and Royal Decree 876/2014, of October 10, approving the General Coastal Regulation (CR), in relation to seasonal services on beaches. (Arts 53 LC and 113 and ss.) Preferential authority of municipalities, unless they show no interest in the announcement made by the Peripheral Coastal Service in the last three months of the year.

- Royal Decree 62/2008, of 25 January, which approves the regulation of the conditions of maritime safety, navigation and human life at sea applicable to nautical concentrations of commemorative character and water sport events.

- Royal Decree 935/2010, of July 23, establishing the qualifications of Sports Instructor in sailing with fixed rigging and Sports Instructor in sailing with free rigging, developed by Order EDU / 2449/2011, of September 5, which establishes the curriculum of the initial and final cycles of Middle Degree corresponding to the qualifications of Sports Instructor in sailing with fixed rigging and Sports Instructor in sailing with free rigging or its equivalent at European level, the qualification being duly recognized by the legal jurisdiction of the country of origin.

- If the activity is carried out in a Protected Natural Area on the coast, it will be affected by the corresponding planning order, which is the responsibility of the Tenerife Island Council.

As a tourist activity it should also be taken into account:

Communication of tourist activity to the General Directorate of Tourism Planning and Promotion. Art. 13.2 a) of Law 7/1995, of 6 April, on Tourism Planning in the Canary Islands.

Decree 37/2014 of 9 May, amending Decree 89/2010, of 22 July, regulating the activity of tourist intermediation. Responsibility of the Department of Tourism, Culture and Sports of the Government of the Canary Islands

Authorisation of complementary private transport by the Island Council. Law 13/2007, of May 17, on Road Transport Planning

in the Canaries and Decree 72/2012, 2 August, approving the Regulations for the development of Law 13/2007, May 17, on Road Transport Planning in the Canaries.

The Government of the Canary Islands, through the General Directorate of Tourism Planning and Promotion, made public on April 21, 2017, the Draft Decree approving the regulation that establishes the legal regime for the development of active tourism activities.

Current product improvement actions

As in other water sport activities, the Island Council Department of Sports has launched the 'Tenerife + Azul' project, with the aim of contributing to the promotion of an economic sector and knowledge of the sea, as well as collaborating in the positioning of Tenerife as a reference destination in the field of national and international sport, through the organisation of sporting events.

This project, together with 'Tenerife and the Sea', both included in the Strategic Multi-Annual Framework of Actions for the Development of Tenerife 2016-2025 (MEDI) contain measures to improve the product, both in relation to accesses, information, communication and promotion of the activity.

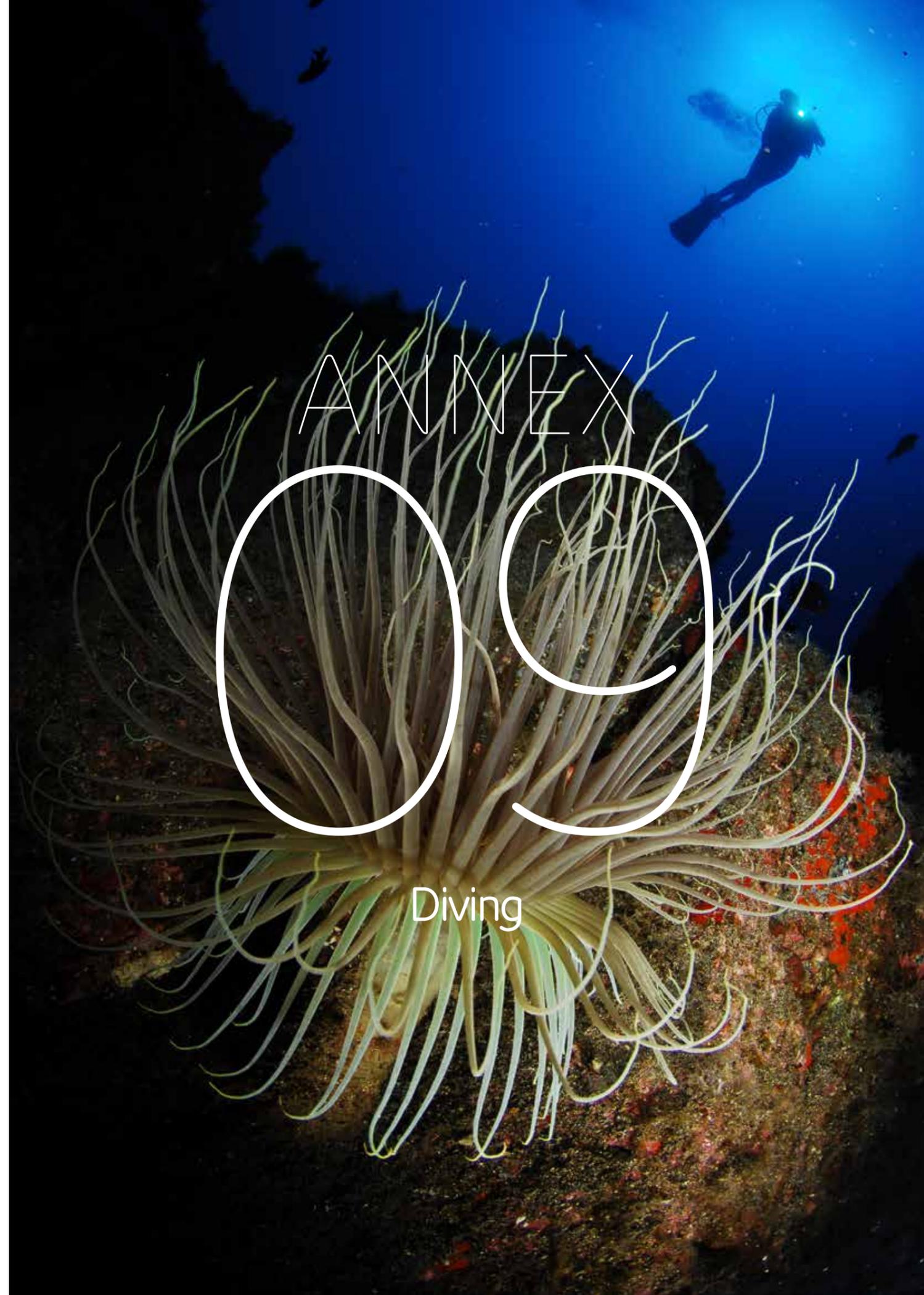
The Tenerife Tourist Board attends to the demands and problems of this sector of activity and transfers them to the corresponding authorities.

Current Promotional Activity

- Map of activities at sea.
- Support for the organisation of the World Windsurfing Championships in El Médano.
- The activity is included in the promotional actions of the 'Tenerife No Limits' brand.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Coordination between the authorities involved and control and inspection of the activity. ■ Conflicts with other activities and users that concur in the same place (bathers, surfers, kitesurfers). ■ Need to approve regulation in the sector that includes, among other things, activities related to the Active Tourism Decree. 	<ul style="list-style-type: none"> ■ Inter-administrative working group for follow-up and business-administration meetings. ■ Prioritize uses and delimit areas for exclusive practice. ■ Promote frameworks for coexistence between different activities. ■ Promotion of the Decree regulating the activities of active and complementary tourism in the Autonomous Community of the Canary Islands. 	A_01
<ul style="list-style-type: none"> ■ Regulation and planning of maritime uses in certain areas. 	<ul style="list-style-type: none"> ■ Marking and signs explaining rules of use on beaches where these activities are carried out. 	A_01 A_02
<ul style="list-style-type: none"> ■ Specialisation of the accommodation offer. 	<ul style="list-style-type: none"> ■ The accommodation supply, with exceptions, is not prepared to offer this type of service and companies that could do so do not have the infrastructure to offer it 	A_02
<ul style="list-style-type: none"> ■ The need to define the maximum capacity for the practice of these activities. ■ Overcrowding in certain areas where the activity is concentrated. 	<ul style="list-style-type: none"> ■ Study to measure the maximum capacity for carrying out these activities in a sustainable way. ■ Provide more information and training for the awareness of practitioners and the general population. ■ Formulate awareness strategies. ■ Reflect on the limits of the development of the activity in terms of sustainability. 	A_08



Relevant data of the activity

Tenerife offers unbeatable conditions for scuba diving as you can dive at any time of the year with a visibility of ten to thirty metres and with a constant water temperature ranging from 19°C to 26°C.

In addition to its great biodiversity, the island offers spectacular underwater landscapes resulting from volcanic activity and its contact with water, such as castings with columnar disjunction, columns in the form of hexagons called "organs", as well as caves and crevices.

Data relating to demand:

Data collected by the Tenerife Tourist Board from the *Survey on the tourism that visits Tenerife 2015-2016* (Tenerife Island Council).

Volume

This activity was done by 2.2% of visitors, approximately 115,000 tourists per year, especially during the summer months.

Economic contribution

Direct spending on the activity generates for the island an income that is estimated at 9.7 million euros, with people spending about 95 € on the sport, the second highest behind golf. This amount is included in a total holiday expense for the sector estimated at around 96.7 million euros.

Visitor Profile

- Main markets of origin: Spain, France, Italy, Russia, Ireland, Finland and Switzerland-Austria. The British and German markets, although of importance in the sector, have a relatively low percentage compared to the overall numbers of visitors to the island from those two countries.
- Young people, about 39 years of age.
- Important amount of family tourism (21%), although we also find tourists that travel alone, as well as those travelling with friends.
- High percentage of new visitors.
- They stay in Tenerife for more than 10 days on average.
- High use of the Internet to organize the trip.
- They tend to stay in apartments and Aparthotels, as well as in private homes.

- High mobility tourism on the island.
- For 16.6% of the tourists that go diving during their stay in Tenerife, being able to do this activity is one of their main reasons for travelling to the island. This is an important percentage which indicates the relevance of the activity and is not just something else to do while on holiday. They are also motivated to travel to Tenerife because of its good connections, its nature and landscapes, the beach and the sea.
- They demand improvements in roads and urban traffic, especially in sign-posting, road conditions and traffic congestion

Data relating to the offer

Resources

There are more than sixty dive points spread throughout the island, as well as three sunken wrecks. Nineteen diving zones have also been identified on the coast:

NUMBER	DIVING ZONE
1	Boca Cangrejo
2	Radazul
3	Tabaiba-Remolcador
4	Caletilla
5	La Caleta
6	El Tablado
7	El Porís
8	Las Eras
9	Abades norte
10	Abades sur
11	Aguadulce-Los Abrigos
12	Montaña Amarilla
13	Armeñime
14	Playa Paraíso
15	Playa San Juan
16	Teno
17	Los Silos
18	Garachico
19	Jover

Businesses

In a study carried out in 2009, a total of fifty-five companies were counted, although due to regulatory complexity, many of them were diving clubs, the reason why they can only offer dives to their members and not to tourists.

Infrastructure

Although it is an activity that does not require specific infrastructure, some improvements are envisaged for the next few years in the accesses and the marking out of diving zones to promote eco-diving and other sustainable aquatic activities.

The Strategic Framework for Island Development (MEDI) 2016-2025 includes investment in this activity in several specific programmes:

- Program 1.4 Tenerife Sports.
- Program 4.6 Tenerife and the Sea.
- Program 4.7 Programme for the Improvement of Tourism Products.

Legal and jurisdictional orders that regulate the activity

- Decree 35/2006, of 25 April, regulating diving centres and underwater sports and recreational instruction in the Autonomous Community of the Canary Islands. Responsibility: General Directorate of Fisheries of the Government of the Canary Islands.
 - Order of October 14, 1997, approving the safety rules for the exercise of underwater activities. In Article 24 On the practice of sport-recreational diving, in Apparatus 13 reads: "A surface vessel will be available for the help and assistance of divers." Scuba diving from land is a prohibited activity throughout the state and included in this standard, however, it is an absolutely ingrained activity with a very important economic relevance. Responsibility of the Merchant Navy, Ministry for Development.
 - Royal Decree 932/2010, of July 23, which establishes the qualification of Sports Instructor in scuba diving with wet suit and sets the minimum teaching and access requirements.
 - Order ARM / 2417/2011, of 30 August, declaring special areas of conservation the sites of marine community importance of the Macaronesian biogeographical region of the Natura 2000 Network and approving their conservation measures. Ministry of the Environment
- As a tourist activity it is also regulated by:
- Law 7/1995, of April 6, on Tourism Planning in the Canary Islands. Responsibility of the Ministry of Tourism, Culture and Sports of the Government of the Canary Islands.
 - Decree 88/2012, dated 15 November, amending Decree 13/2010, of February 11, regulating the access and exercise of the profession of Tourist Guide in the Autonomous Community of the Canary Islands. Responsibility of the Department of Tourism, Culture and Sports of the Government of the Canary Islands.
 - Decree 37/2014 of 9 May, amending Decree 89/2010, of 22 July, regulating the activity of tourist intermediation. Responsibility of the Department of Tourism, Culture and Sports of the Government of the Canary Islands.
 - Decree 72/2012, 2 August, approving the Regulations for the

development of Law 13/2007, May 17 (BOC 104, 24.5.2007, BOE 143, 15.6.2007), Canary Islands. Responsibility of the Department of Public Works and Transport of the Government of the Canary Islands

The Government of the Canary Islands, through the General Directorate of Tourism Planning and Promotion, made public on April 21, 2017, the Draft Decree approving the regulation that establishes the legal regime for the development of active tourism activities.

Current product improvement actions

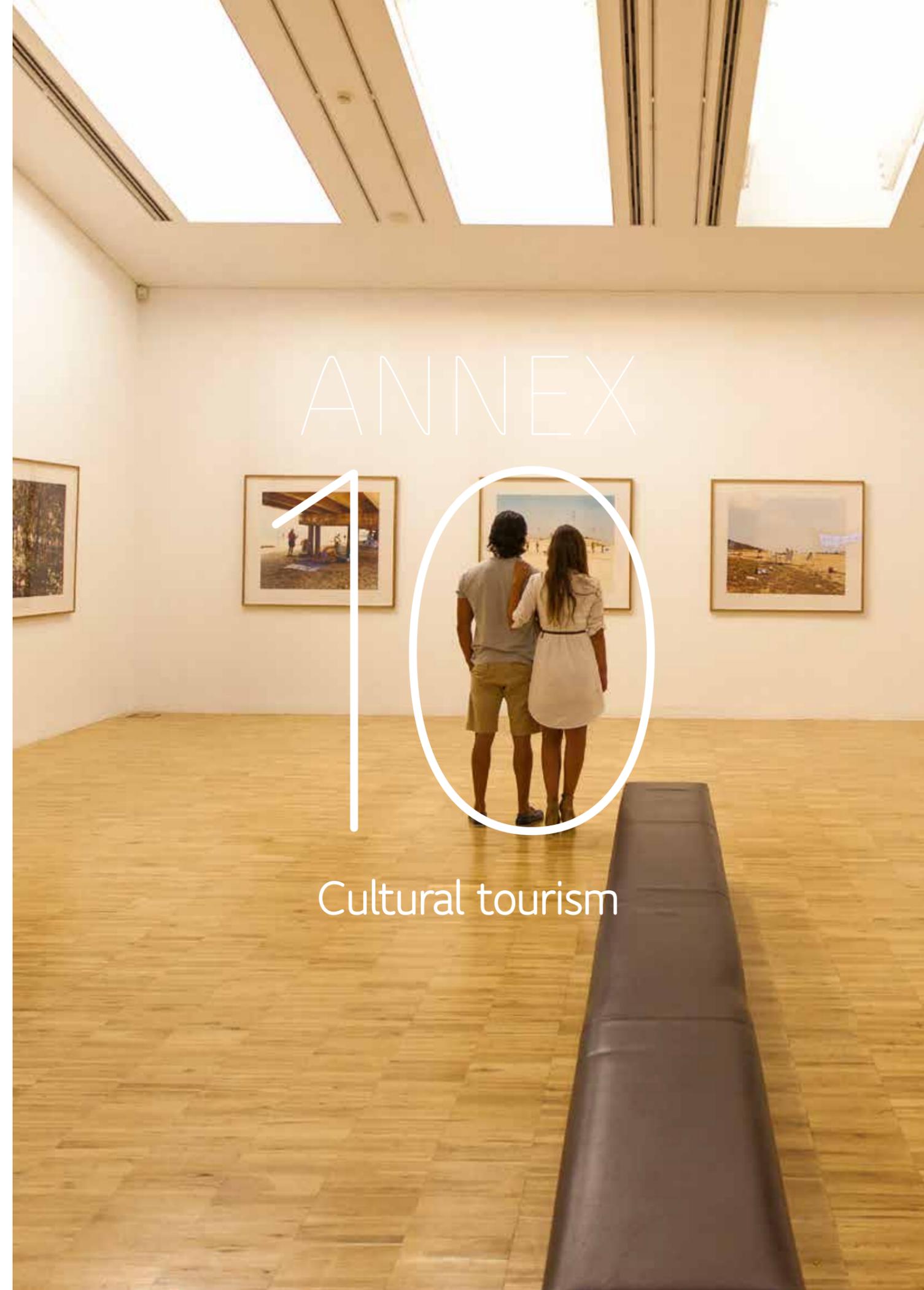
- Analysis of the main diving points.
- Study of the creation of micro-ecotourism areas.

Current Promotional Activity

- Map of activities at sea.
- Activity included in the promotional actions of the 'Tenerife No Limits' brand.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> Coordination between administrations with responsibility. Greater control and inspection. Large number of Administrations involved in the regulation of activities at sea. Need to approve regulation in the sector that includes, among other things, activities related to the sea (Active Tourism Decree). 	<ul style="list-style-type: none"> Inter-administrative working group for follow-up and entrepreneurial-administrative meetings. Concentration of skills in a smaller number of administrations or creation of a single window for sea activities. Promotion of the Decree regulating the activities of active and complementary tourism in the Autonomous Community of the Canary Islands. Review of specific regulations 	A_01
<ul style="list-style-type: none"> The need for new areas for the carrying out of the activity. 	<ul style="list-style-type: none"> Interventions aimed at the creation of artificial reefs and sinking of wrecks. 	A_02
<ul style="list-style-type: none"> Improve the sustainability of the activity. 	<ul style="list-style-type: none"> Encourage ecotourism related to this activity. 	A_04 A_08
<ul style="list-style-type: none"> The need to define the maximum capacity of some activities and places of practice. 	<ul style="list-style-type: none"> Plans to measure maximum capacity. 	A_08
<ul style="list-style-type: none"> Knowledge of the regulations by all the administrations involved. Knowledge and awareness of marine natural resources. 	<ul style="list-style-type: none"> Specialized training in the characteristics of the activity for the personnel of the public administrations involved. Training and awareness-raising actions about the marine environment for the general public. 	A_10



Relevant data of the activity

Definition of cultural activity

According to UNESCO, it is “all the distinctive features, spiritual and material, intellectual and affective that characterise a society or a social group. It encompasses, in addition to arts and letters, ways of life, the fundamental rights of the human being, value systems, traditions and beliefs. “

Activity

The sectors that are included in the document *Challenges for culture in the Canary Islands (2016)* of the Strategic Plan of the cultural sector of the Canary Islands are the following:

- Performing arts.
- Visual arts.
- Music.
- Books.
- Audio-visual.
- Heritage.

To this can be added new means of communication (which include digital and face-to-face initiatives with new languages, using non-traditional media for the development of culture - for example, LAN Parties, Labs-mediation spaces for creation, etc.).

Data relating to demand

Data collected by the Tenerife Tourist Board in the *Survey on the tourism that visits Tenerife 2015-2016* (Tenerife Island Council). Only disperse information is available for tourists who have made some visits to museums, concerts, exhibitions, as well as for those who attend traditional or folkloric events.

Volume

5% of the island's tourists visited museums, concerts or exhibitions during their stay, which translates into an estimated 250,000 visitors. 4% attended traditional or folk events, amounting to about 193,000 tourists.

Demand has remained stable in recent years.

Economic contribution

Visits to museums, [concerts and exhibitions bring to Tenerife](#) 6.2 million euros in direct spending on the activity, with tourists spending € 25 on average. Tourists from this sector generated revenues of 214 million euros while on holiday on the island.

This sector generates, apart from its tourist spending, an estimated 161 million euros. The economic impact of attendance at tradition-

al or folkloric events is estimated at about €3.4 million, with an average spending of €18 per person on the activity.

Visitor Profile

- The most important markets with regard to the visiting of museums, concerts and exhibitions are: Spain, Germany, France, Russia and Italy. In traditional and folk events, there is also Spanish, German and French tourism, although not Italian or Russian. The importance of the British market is high in the number of visitors in both activities, although not in relative terms, with participation in cultural activity that is half of its market share on the island.

- Tourists that usually travel as a couple.

- They use conventional accommodation (four-star hotels and extra-hotel accommodation)

- The organising of the trip is more conventional than in other tourist activities (tour operators and travel agencies)

- About 3% of the tourists that travel to Tenerife have been motivated by the cultural offer.

Data relating to the offer

Cultural facilities

The most important cultural facilities on the island are located mainly in the capital, Santa Cruz, although there are a number of secondary places spread out over the territory, especially with regard to museums.

Those analysed from a tourist perspective by the Study of Tourism and Culture carried out by the Tenerife Tourist Board in 2010, are:

- The **Tenerife Auditorium**: it has become an icon of the island since its inauguration in 2013. It has a symphonic room with 1,616 seats and a chamber hall with about 400 seats. Its tourist interest is based more on the building itself than on the cultural offer, since the programming is directed mainly at the local public. The main barrier is the timetable of the performances, which makes it difficult for tourists to attend as the majority stay in different parts of the island.

- **Tenerife Arts Centre (TEA)**: it houses the Óscar Domínguez Institute, the Island of Tenerife Photography Centre and the Island Library. It is not aimed directly at the tourist public, although it gives an image of quality and modernity to the city and to the island.

- **Museums**: There is a double network, that of the museums managed by the Island Council and those run by the town halls. There is no single network, which makes it difficult to present visitors with a coordinated museum offer.

Although there are museums of high quality and uniqueness, such as **the Museum of Science and the Cosmos** (La Laguna) and the **Museum of Nature and Mankind** (Santa Cruz), visits to museums by tourists are infrequent, on the one hand, because professionals in the tourist sector do little to inform visitors about them, and on the other, by the difficulty of competing with the commercial incentive of guides' commissions. Other museums are the Museum of History and Anthropology (La Laguna) and the Documentation Centre of the Canary Islands and the Americas (La Laguna).

Among the municipal museums is the **Museum of Fine Arts in Santa Cruz de Tenerife** stands out. And in second place by number of visits, are the following:

- Archaeological Museum of Puerto de la Cruz.
- Casa Torrehermosa Craft Museum (La Orotava).
- Museum of Iberian-American Crafts, MAIT (La Orotava).
- Ethnographic Museum of Pinolere (La Orotava).
- The Carpet Museum (La Orotava).
- Museum of Sacred Art "The treasure of La Concepción" (La Orotava).
- The Almeida Regional Military Museum (Santa Cruz).
- Municipal Museum of Fine Arts (Santa Cruz).
- Museum of Byzantine Icons (La Laguna).
- The Dimas Coello Museum (Candelaria).
- The Masca Ethnographic Museum.

To the analysis carried out in 2010 can be added the Sacred Art Museum (Puerto de la Cruz), the Santa Clara Museum of Sacred Art (La Laguna), the Visitor Centre Castillo de San Cristóbal (Santa Cruz), the Cristino de Vera Foundation (La Laguna), the Puerto Street Art Museum (Puerto de la Cruz) and the Casa del Carnaval (Santa Cruz).

The latter, with 1,052.74 square metres, will have a part dedicated to a permanent exhibition, a multi-purpose room, a documentation and heritage conservation centre, as well as a shop and cafeteria that will complement the stay of those who visit it.

■ Congress Centres

- MAGMA (Adeje) for its interest as a building and the large accommodation, leisure and restaurant offer nearby could make it an international reference point for the holding of events and meetings.
- The International Trade Fair and Congress Centre of Tenerife: very limited cultural repercussion.
- The Congress Centre of Puerto de la Cruz: also underused and with little accent on cultural events.

■ Arts centres

They could receive a significant number of visitors but are located mainly in the metropolitan area and lack a single network, which does not facilitate visits.

Of particular note are the Cabrera Pinto Institute (La Laguna), the Contemporary Arts Centre of the Government of the Canary Islands and the El Tanque Cultural Centre (Santa Cruz).

■ Performing Arts Centres

Their programming is generally intended for the local public, which implies an important language barrier for foreign audiences.

The most prominent are located in the Metropolitan area: **the Guimerá Theatre** (Santa Cruz), **the Leal Theatre and the University Paraninfo** (both in La Laguna), away from the main tourist centres. The only notable initiatives for visitors are the Carmen Mota show at the **Arona Pyramid**, with continuous and successful programming for more than a decade and the Tenerife Symphony Orchestra's programming at MAGMA, which ceased due to a lack of economic viability.

To this analysis of 2010 should be included the **Infanta Leonor Auditorium** (Arona), inaugurated in 2011 and which hosts congresses and conferences, concerts, theatre and cinema. It has a capacity of 700 seats, and in its season, from October to March, 60% of its shows are filled by the tourist public. Demand is especially high for classical music and flamenco, although there are also successful musicals, and, some way behind, folk music.

Also in 2011 the **Timanfaya Theatre** (Puerto de la Cruz) reopened with the Reyes Bartlet Choral Society offering programmes for tourists throughout the year (the Bach Festival, the Pianissimo Season and Matinée Concerts), which has included among its offer productions of high tourist interest like the Pieles show.

Events

There is a wide range of events and festivals varying greatly in size and quality. It is necessary to review and structure the dialogue between the Departments of Tourism and Culture to define what values we want to disseminate, what to offer directly to visitors, as well as analysing the events and activities that we want to preserve or limit to local people so they do not lose their essence.

Heritage

MAIN HISTORICAL SITES

San Cristóbal de La Laguna, declared a World Heritage Site by UNESCO in 1999 for being the first example of a non-fortified colonial city and direct precedent of the new American foundations. Of the historical heritage sites in Tenerife it is the best valued in terms of its marketing as well as a tourist destination (Source: Study of Tourism and Culture, Tenerife Tourist Board, 2010).

La Orotava: its old town was declared a Monument of National Historic and Artistic Interest in 1976. It is considered little exploited by tourism due to insufficient publicity. The ethnographic value of the Corpus and the elaboration of carpets of flowers and sand should also be highlighted.

Icod de los Vinos was named a Cultural Interest Site in 2002 and its most emblematic element is the Drago tree, one of the oldest living things in the world.

Garachico: In addition to its architectural heritage, it has a very singular environment with natural pools formed by lava from the eruption of a volcano in 1706.

NATURAL HERITAGE

There are a total of forty-two protected areas, 48% of the island's territory. The most famous is the Teide National Park, which was included in the list of World Heritage Natural Sites in 2007. It is Spain's most visited national park (according to data from the Ministry of Agriculture and Fisheries, Food and the Environment corresponding to the year 2015, with 3.3 million visits per year). It is also the most visited volcanic spot in the world after Mount Fuji in Japan.

The wealth of natural heritage in Tenerife, with important varieties of landscape, goes much further than the Teide. Therefore, it is necessary to give a cultural perspective to the offer of activities that opens up possibilities for tourist experiences which respect to the environment. It is necessary to understand that this forms part of the island's own culture.

THE PRIVATE SECTOR

The cultural offer focuses almost exclusively on initiatives driven by the public sector. Private investment has focused more on other sectors, especially theme parks.

Among all the private initiatives linked to culture, the Carmen Mota Ballet stands out for its impact, consolidation and attractiveness. The investment in production, advertising and marketing has proven profitable, although it is useful to make an in-depth analysis of the products related to tourism that currently have little relation with the cultural sector.

It would be desirable to generate products which have a greater relation to identity and territory. Tourism companies, especially hotels, hire entertainers who have little to do with our cultural identity, usually in a precarious condition, denying our culture its value.

On the other hand, one area where there is clear interaction between private initiative and Tenerife culture is in gastronomy and wine-making. In recent years the culinary offer on the island has improved considerably and it has been accompanied by an incipient business which encourages tourists to take interest in Tenerife's wine tradition. We mention the Casa del Vino La Baranda in El Sauzal, but also visits to private wineries such as Monje (Tacoronte) which has a multicultural zone where theatre, music and dance are combined; El Lomo (Tegueste), Frontos (San Miguel), Viñátigo (Icod), Tajinaste (Valley of La Orotava).

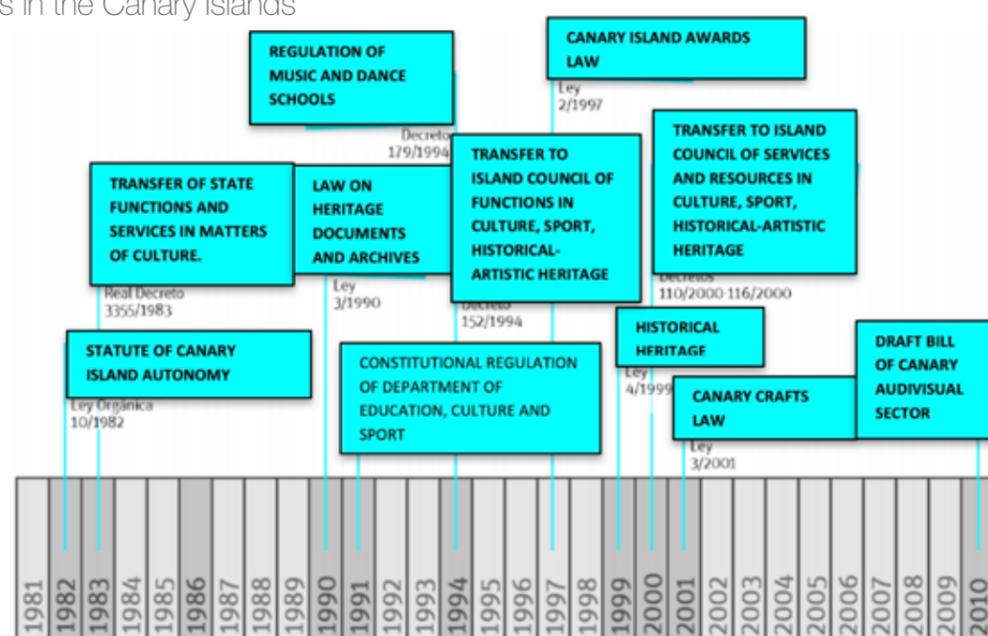
Legal and jurisdictional orders that regulate the activity

In 1983 the functions and services of the State in matters of culture were transferred to the Autonomous Community (Royal Decree 3355). Subsequently, in 1994, these legal responsibilities were transferred from the Canary Island Government to the Island Councils (Decree 152) and the transfer of resources and services was terminated in 2000.

Although authority has been transferred, the Government of the Canary Islands continues to have the function of planning and developing cultural projects that are aimed at the entire Canary territory, while the role of an island council is limited to its own island. However, coordination has not always been well structured and this is a clear challenge for the future.

The lack of inter-administrative coordination also explains the lack of legislative frameworks to regulate the development of sectors, not so much so as to have greater control over the sector, but to promote coordination and the design of cultural policies with a shared horizon.

Corpus of legal norms in cultural matters in the Canary Islands



Source: *Strategic Plan for the Cultural Sector in the Canaries (2016) Government of the Canary Islands*

Current promotional activity

Tenerife promotes the culture of the island for general tourism as an enriching element of the tourist offer. There is no tourism brand linked to culture, nor has the Tenerife Tourist Board established a specific strategy for this product in previous years.

Needs detected and the corresponding intervention proposals

In the diagnosis made in the *Strategic Plan of the Cultural Sector in the Canary Islands* (2016), the Canary Island Government established a series of factors from which the following are extracted:

Strengths:

- Strategic situation for intercontinental relations with Latin America and Africa.
- The cultural identity of the Canary Islands, which provides wealth worldwide and an image to be exported.
- Change in the global economic model, which gives greater value to creativity.

Weaknesses:

- Especially affected by the economic crisis and dependence on tourism.
- Reduced Canary domestic market (production, consumption).
- Little relationship between tourism and culture, which hinders the position of the Canary Islands in this area in relation to other destinations.

The Plan also shows a diagnosis of the cultural system of which we highlight the following aspects:

Strengths:

- It focuses on the audio-visual sector as strategic, with a favourable economic and fiscal system.
- Cultural and heritage diversity, an asset on which Canary culture is based.

- Music as an element of identity and projection. High level of activity with continuous programmes and the proliferation of prestigious national and international festivals.

- Potential derived from the digital explosion, which favours smaller industries such as that of the Canary Islands.

Weaknesses:

- Excessive dependence on public bodies in cultural spheres and sectors.
- Lack of information tools and cultural observation.

- Weak creative industry in some sectors, lacking innovative companies.

- Insufficient exterior projection.

On the other hand, in the **diagnostic working groups to update the Canary Island Culture Plan (PCC)** held in Santa Cruz de Tenerife on March 29, 2017, the Tenerife Tourist Board was involved in the Transversal Working Group on Tourism and Culture, from which these conclusions were obtained:

- An in-depth analysis of the cultural reality in the Canary Islands (offer and demand) is required.

- Importance of offering Canary cultural reality in an honest and quality way.

- It is necessary to work on improving permits and facilities to develop culture in non-conventional places, especially in the street.

- There is no communication channel that combines the entire cultural offer for tourism.

- Cultural programming must be well-planned and communicated in time.

- The creation of a Culture Council in a way similar to the Economic and Social Council (which is already created within the Canary Island Culture Plan, but the moderators were not aware of it. Even so, the fact there is demand for this demonstrates that it is still not in operation).

- Educate in culture so that what we offer is first experienced by us and also to prepare future consumers.

In relation to the specific reality of the island of Tenerife, the following are some conclusions of the Working Group on **Tourism and Culture**, held on March 3, 2017 as part of **the renewal of the Tenerife Tourism Strategy**:

Contributions and development of actions of the Tourism and Culture Working Group

WHAT COULD THE CULTURAL SECTOR CONTRIBUTE TO TOURISM?

- Transfer an image of modernity to show a people connected to global trends, one that has rich cultural expressions, respects the environment and enjoys itself responsibly in an environment of excellence.

- Design operational and periodic structures of work between the cultural and tourist sectors.

- Creation of the Tenerife cultural tourism observatory.

- The cultural sector must realise that a good part of its potential users can be visitors (depending on the activity) as a starting point for the adequate structuring of cultural

services, making them more accessible to tourism. There must be a more fluid communication / relationship model using new technologies.

- Full development of cultural tourism. To promote human contact between locals and visitors and to share common interests, it is necessary to have a strategy that brings closer these new codes of creation, of shared knowledge, to continue being an island that is connected to the world (linking directly with the 'Strategy 2030' of the Tenerife Island Council).

- Generation of a budget oriented to the development of cultural tourism in Tenerife between the departments of Culture and Tourism.

- Generation of a strategic plan for the sector with a complete route of implementation and linked to cultural tourism.

- Initial curriculum with the Department of Education and the Island Council Education Department to seek rapprochement and understanding. Agreement about the objectives, strategies and methodologies of work between the sectors of Culture, Tourism and Education.

- Identify training processes in tourism in Tenerife that include in the curriculum the subject of cultural tourism. Incorporate into the same the ideas resulting from the strategic plan.

- Up to now, this social, historical and cultural contribution has only tangentially and periodically connected with the tourism system, mainly deployed in coastal areas ("sun and beach"). There is currently no integrated discourse and activities to diversify offers in the destination.

- Training in the cultural field on those aspects that can help tourism development and vice versa.

- Culture, in the public domain, should be thought of as reciprocal for and from local citizens in a process of exchange in which the visitor, a priori, should not represent any variable. The assumption of our own culture will make it easier for people who visit us to perceive it and value it as something authentic.

- Find and bring together partners in all public and private administrations that have responsibility and knowledge in both sectors.

- Generate meeting platforms (practical and operational think tanks). Without transfer of information and experiences it is not possible, in our opinion and experience, to achieve cooperative work.

- Establish jointly between the tourism and cultural sectors one or several archetypes about what is to be shown about our own cultural identity and how it is to be shown, internally and externally.

- Draw up, based on the considerations established in the Strategic Plan for Cultural Tourism, a catalogue of which elements have the possibility, capacity or availability to become cultural tourist attractions and what their importance could be.

AND FROM THE TOURISTY TO THE CULTURAL?

- A universe of more than five million people who come to Tenerife annually to enjoy their holidays and who can be direct participants in the cultural activities on the Island.

- Plan, design and implement infrastructure works related to these areas.

- Manage a common calendar of activities throughout the year in which all event promoters can participate. This would avoid clashes in dates and geographical areas, distributing the events in a more coherent and homogeneous way, in addition to favouring a coordination of resources (in terms of infrastructure, sponsors, travel agents).

- In the absence of data on consumption and valuation of participation in activities the tourism sector can provide methodology and experience.

- The transfer of knowledge: create a space of analysis and knowledge between both sectors. The incorporation of the cultural tourism observatory into the project is a fundamental element in this regard.

- Connection with the world for the contribution of artistic, technological and political knowledge.

- Incorporation into the different global networks for research, development and implementation of policies related to cultural tourism and innovation in culture-based destinations.

- By looking at who visits us we have built a picture adapted to their expectations. Canary artists who have worked with tourism are beginning to offer keys to interpret such phenomena in their creative production. They should be seen as a current element of identity.

- Identify these processes, analyse them and provide information to the cultural and tourism sectors of this reinterpretation so necessary to know ourselves and to be able to project externally.

- Strengthen the points of concomitance that the culture itself must put into operation: public art galleries can contribute to a better knowledge of what we Canarians are and what we propose from culture; certain festivals are able to share our own identity with foreign visitors.

- The tourism sector can help to make visible, disseminate and value the cultural sector, as well as to give it dynamism and create business opportunities around existing resources that are not exploited or not sufficiently exploited. Managed in a sustainable, appropriate and inclusive way with the local population, it can also help in the recovery and maintenance of its cultural identity to serve as a basis in its creation, innovation and even reinterpretation.

- Establish a common area of work between the two sectors that meets the communication objectives for the development of cultural tourism in Tenerife

- Create an annual communication plan, allowing permanent information about cultural events and services. Special attention should be given to the digital media and social networks, but also to the accommodation establishments, activity companies and the Infoten network.

- Involve the staff of these establishments, with previously agreed incentives, affinity and commitment to festivals and events, as well as what they represent in the city.

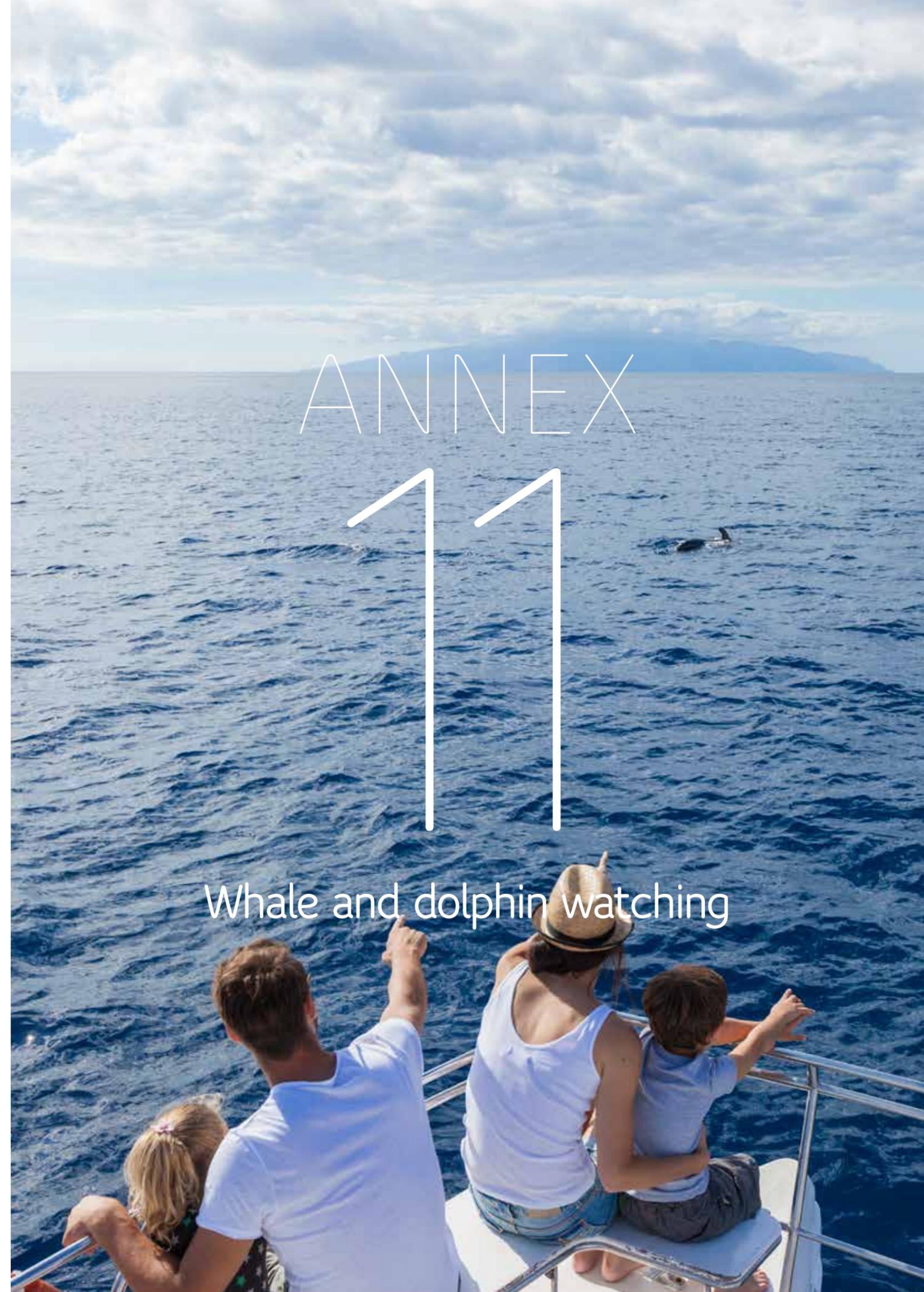
- Study the opportunities presented by so-called "audio-visual tourism", attracted by wanting to get to know the places where some film productions have been shot. An obvious case is New Zealand with 'Lord of the Rings', or London with the filming of 'Harry Potter'.

Needs detected and the corresponding proposals for intervention

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Development of culture in the street, taking advantage of a privileged climate. 	<ul style="list-style-type: none"> ■ Work on the improvement of licences. Necessary revision of the Canary Law of Shows and some municipal ordinances, since they are excessively restrictive with the level of sound in the street. ■ Create a common Tourism / Culture budget. ■ Strategic plan for the sector linked to cultural tourism. 	A_01
<ul style="list-style-type: none"> ■ Assume our own culture, which will make it easier for visitors to perceive and value it as something authentic. 	<ul style="list-style-type: none"> ■ Bring together public and private dialogue in both sectors (Culture and Tourism). ■ Create meeting platforms to favour cooperative work. ■ Establish jointly one or more archetypes of how we want to present our cultural identity internally and externally. 	A_01 A_05
<ul style="list-style-type: none"> ■ Tenerife receives more than five million visitors annually who are not always direct participants in the cultural activities of the island. 	<ul style="list-style-type: none"> ■ Planning, designing and carrying out related infrastructure work. ■ Manage a common calendar of activities throughout the year, coordinating dates and resources. 	A_02 A_05
<ul style="list-style-type: none"> ■ Offer Canary culture in an honest and quality way. 	<ul style="list-style-type: none"> ■ Adapt cultural services to make them accessible to tourism. 	A_04 A_08
<ul style="list-style-type: none"> ■ Project an image of modernity, of a people connected with world trends, one which has rich cultural expressions, that respects the environment and enjoys itself responsibly in an environment of excellence. 	<ul style="list-style-type: none"> ■ Design of operational and periodic structures of work between the cultural and tourist sectors. ■ In-depth analysis of the cultural reality in the Canary Islands (offer and demand). Creation of the Observatory of Cultural Tourism of Tenerife. 	A_01 A_05

Needs detected and the corresponding proposals for intervention

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> To assume our own culture in order to share it with foreign visitors. 	<ul style="list-style-type: none"> Identify these processes, analyse them and give information to the cultural and tourist sector of this reinterpretation, which is necessary in order to know ourselves and to be able to project ourselves externally. Joint work area that combines communication objectives for the development of cultural tourism in Tenerife. Annual communication plan on cultural events and services. Special attention to the digital media and social networks, but also to hotels, activity companies and the Infoten network. Involvement of the staff of these establishments in terms of commitment to local festivals and events. 	A_05
<ul style="list-style-type: none"> Connection with the world, contribution of knowledge of the artistic, technological, political and relationship medium. 	<ul style="list-style-type: none"> Incorporation into the global networks of research, development and implementation of cultural tourism policies and destination innovation. Study opportunities for audio-visual tourism, attracted by wanting to know the territories where these productions have been filmed. 	A_06 A_07
<ul style="list-style-type: none"> In the absence of data on consumption and assessment of participation in activities, the tourism sector can provide methodology and experience. 	<ul style="list-style-type: none"> Create a space of analysis in order to transfer knowledge between both sectors. The role of a cultural tourism observatory is essential. 	A_07
<ul style="list-style-type: none"> New skills and knowledge shared with the tourist for the full development of cultural tourism. 	<ul style="list-style-type: none"> Visibility, dissemination and enhancement of the cultural sector. Sustainable and inclusive management with the local population in order to recover and maintain their cultural identity as a basis for creation, innovation and reinterpretation. Integration of history and culture into the discourse and activities to diversify the offer in destination 	A_08
<ul style="list-style-type: none"> Agreement in terms of objectives, strategies and methodologies of work between Tourism, Education and Culture. 	<ul style="list-style-type: none"> Identify training processes in tourism in Tenerife that include in the curriculum the subject of Cultural Tourism. Training in the cultural field on aspects that help tourism development and vice versa. Government of the Canary Islands and Island Council. 	A_10



Relevant data of the activity

The Canary Islands is a place of special tourist interest on an international scale due to the great diversity of cetacean species present in its seas, as well as the extraordinary opportunities for their observation throughout the year. Of the more than eighty species of cetaceans that exist, around thirty have been registered in the Canaries, which indicates the wealth of species in the area.

The southwest coast of Tenerife is an area of extreme ecotourism value, both as a transit zone for migratory species and as the habitat for feeding and reproduction of resident species, such as pilot whales, short-finned pilot whales and bottlenose dolphins.

Data relating to demand

Data collected by the Tenerife Tourist Board in the *Survey on the tourism that visits Tenerife 2015-2016* (Tenerife Island Council).

Volume of demand

Whale and dolphin watching is one of the most popular tourist activities, after theme parks and hiking. Between 12% -13% of the tourism that travelled to Tenerife in 2015, estimated at more than 700,000 tourists, went on a boat trip to see cetaceans. The demand for this activity has increased in recent years.

Economic contribution

It is the activity with the second greatest direct economic impact in Tenerife. This sector generates an income of 467 million euros from tourist spending. The direct economic impact of the activity is estimated at about 30 million euros, with tourists spending an average of €42 on the activity.

Visitor Profile

- The most important markets for this activity are the German and Spanish, but the French, Italian, Dutch, Swiss-Austrian and Russian markets must also be taken into account.
- High percentage of family tourism and high participation of new visitors, since it is an activity that is usually done on the first visit.
- They are generally younger than the average age of our tourists.
- It is a high mobility and active tourism that also takes part in other activities related to the sea or adventure sports. They also tend to visit Mount Teide by cable car and go on star observation excursions. Half of them also visit the theme parks on Tenerife, given that there is a high percentage of families that like to do this.

- Their main motivations for travelling to the island are focused on the climate, the sun and getting to know the island.

- They demand improvements in terms of information, as well as greater regulation of the prices of this activity.

Data relating to the offer

Resources

- The activity takes place in an area of great environmental interest - the Teno-Rasca Special Marine Conservation Area.
- There are permanent colonies of pilot whales and bottlenose dolphins near the coast, at a distance of approximately three miles.
- Twenty-one species of cetaceans can be observed throughout the year.
- It is possible to see other species, such as turtles and seabirds.
- It is an activity that can be carried out throughout the year, thanks to the climatic conditions.
- Interest of the southwest coast, where the activity is carried out, characterized by large cliffs, such as those at Los Gigantes and other volcanic phenomena.

Business Offer / Infrastructure

The number of vessels authorised by the Government of the Canary Islands has continued to grow. In 2014 there were thirty and at present, as of March 2017, there are forty-one (37% more).

The percentage of illegal vessels in this activity is very high, with excursions offered by unauthorized boats, as well as boats that offer other maritime activities but also include the sighting of cetaceans. It is estimated that in Puerto Colón less than half of the boats that offer this activity are legal.

PORT	NUMBER OF BOATS
Puerto de Los Cristianos (Arona)	5
Puerto de Los Gigantes (Santiago del Teide)	13
Puerto Colón (Adeje)	19
Marina del Sur (Las Galletas)	3
Playa San Juan (Guía de Isora)	1
TOTAL	41

Source: Department of Tourism, Culture and Sport of the Canary Island Government

Legal and jurisdictional orders that regulate the activity

- Decree 178/2000, of 6 September, regulating the activities of observation of cetaceans.
- Royal Decree 1727/2007, of 21 December, establishing measures for the protection of cetaceans.
- Law 42/2007, of 13 December, on Natural Heritage and Biodiversity.
- Law 14/2009, of December 30, amending Act 7/1995, of April 6, on Tourism Planning in the Canary Islands.
- Decree 13/2010, of February 11, which regulates the access and exercise of the profession of tourism guide in the Autonomous Community of the Canary Islands.
- Law 41/2010, of December 29, on the protection of the marine environment.
- Order ARM / 2417/2011, of 30 August, declaring special areas of conservation the sites of marine community importance of the Macaronesian biogeographical region of the Natura 2000 Network and approving their conservation measures.
- The law 27/1992 of State Ports and Merchant Marine.
- Municipal ordinances.

As a tourist activity, in addition, it should be taken into account:

- Law 7/1995, of April 6, on Tourism Planning in the Canary Islands. Responsibility of the Department of Tourism, Culture and Sports of the Government of the Canary Islands
- Decree 88/2012, dated 15 November, amending Decree 13/2010, of February 11, regulating the access and exercise of the profession of Tourism Guide in the Autonomous Community of the Canary Islands. Competition: Department of Tourism, Culture and Sports of the Government of the Canary Islands
- Decree 37/2014, of 9 May, amending Decree 89/2010, of July 22, regulating the activity of tourist intermediation. Responsibility of the Department of Tourism, Culture and Sports of the Government of the Canary Islands
- Decree 72/2012, 2 August, approving the Regulations for the development of Law 13/2007, May 17 (BOC 104, 24.5.2007, BOE 143, 15.6.2007), Canary Islands. Responsibility of the Department of Public Works and Transport of the Government of the Canary Islands

Entities with legal authority

- D.G. of Tourism Planning and Promotion, of the Government of the Canary Islands, grants the Blue Boat flag for the activity of whale watching.

- D.G. of Sustainability of the Coast and Sea, of the Ministry of Agriculture and Fisheries, Food and the Environment, grants administrative authorisation for the recreational activity of observation of cetaceans.

- Maritime Civil Guard, in charge of the control of vessels at sea.

- Maritime Captainty, dispatch of vessels.

Currently, the Government of the Canary Islands is considering amending the decree regulating the activity and the Ministry of Agriculture and Fisheries, Food and the Environment is preparing a draft order to regulate the nautical-recreational activities in the Special Areas of Conservation, responsibility of the General Administration of the State located in the Canary archipelago.

Current improvement actions

- Quality Charter for whale and dolphin watching.
 - Project started in 2010 with ten whale watching companies. It supposes a voluntary commitment from companies, with criteria of quality and of protection of the environment.
 - It consists of fifteen points that are evaluated annually by means of a mystery client.
 - Out of the total of authorised companies, fourteen adhere to the Charter of Quality of the Tenerife Tourist Board, which makes up a total of nineteen boats.
- Coordination with institutions with authority to control the activity: the Canarian Government, Maritime Captainty, the Civil Guard, the Ministry of Agriculture, Food and the Environment.
- Information and awareness campaign:
 - Letter informing of legal companies sent to ASHOTEL, CEST, CIT del Sur, hotels and associated intermediary companies.
 - Placing two signs, one in Puerto Colón and one in Los Gigantes, informing in three languages about the obligation for whale watching vessels to fly the Blue Boat flag.
 - Information on regulations and on the Quality Charter at www.webtenerife.com
 - Information material on the species to be sighted to be distributed on the vessels of the Quality Charter.
- Presentation of the BIOCONTUR project to raise awareness and information on the sustainable management of the ZEC activities / Teno-Rasca project for LIFE 2017.

Current Promotional Activity

A generic promotion is carried out in almost all markets through information on the web, specific brochures, trade fairs, as well as activity included in the programmes of press and familiarization visits with travel agencies and tour operators.

It is an activity that, although it should have the potential for the differentiation of the destination, as much for the attraction of whale watching in itself as for the conditions that the destination presents, it has not been able to differentiate itself as an eco-tourism activity yet.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Coordination between legally responsible entities.. 	<ul style="list-style-type: none"> ■ Consolidation of a working group for permanent coordination. 	A_01
<ul style="list-style-type: none"> ■ Lack of resources for inspection and control of the activity. 	<ul style="list-style-type: none"> ■ Innovative formulas that generate the maximization of economic and human resources of the administrations responsible. ■ Assess the creation of a surveillance figure authorised by all administrations and / or the application of ICT. ■ Definition and implementation of a monitoring system for the monitoring of cetaceans. 	A_01
<ul style="list-style-type: none"> ■ Adaptation of the regulations to current tourist and environmental needs. 	<ul style="list-style-type: none"> ■ Revision study of the regulations and proposed modifications. Creation of the figure of interpreter of the marine environment. 	A_01
<ul style="list-style-type: none"> ■ The activity has little differentiation between the existing offer. 	<ul style="list-style-type: none"> ■ Differentiation in specialised sectors. 	A_04
<ul style="list-style-type: none"> ■ Specific information on natural resources and their sensitivity. 	<ul style="list-style-type: none"> ■ Material for use in destination with specific information about the product. Publicity campaigns and environmental awareness. 	A_05
<ul style="list-style-type: none"> ■ Promote greater quality in the service of the activity and the sustainability of it. 	<ul style="list-style-type: none"> ■ Recognize the Quality Charter as an official tool by the Administrations responsible for the improvement of the activity. 	A_08
<ul style="list-style-type: none"> ■ Knowledge and management of the environmental impact of the product. 	<ul style="list-style-type: none"> ■ Research and calculation of maximum capacity. 	A_08 A_07
<ul style="list-style-type: none"> ■ Training and professional specialisation. 	<ul style="list-style-type: none"> ■ Training plan for professionals of companies of the sighting of cetaceans. 	A_10
<ul style="list-style-type: none"> ■ Specific information on natural resources and their sensitivity. 	<ul style="list-style-type: none"> ■ Material for use in destination with specific information about the product. Publicity campaigns and environmental awareness 	A_08 A_10



ANNEX

12

Paragliding

Relevant data of the activity

Tenerife is the place that has more days to practice paragliding than anywhere else in the world. The mildness of its climatic conditions, together with its special orographic and orientation characteristics to the prevailing winds, allows free flight in paragliding for at least 330 days of the year, in some of its many flight zones. Due to its enormous, triangular-shaped central massif, which has an average altitude of 2,000 metres, it is possible that even with the worst atmospheric conditions on one of its faces, there is still good weather on one of the other two. In addition, the proximity between the different areas of flight allows different areas to be visited in the same day.

Data relating to demand

Data collected by the Tenerife Tourist Board in the *Survey on tourism that visits Tenerife 2016* (Tenerife Island Council).

Volume of demand

The activity was practiced by 1% of the tourists that visited Tenerife in 2016, which amounts to some 52,000 practitioners during the year.

Economic contribution

It is an activity that generates 3.1 million euros for Tenerife from direct spending on its practice, with an expenditure of 67 euros per person. The income from the total expenditure on holidays for paragliding tourism comes to 44 million euros.

Visitor Profile

- The most important markets in this activity are the United Kingdom, Germany, Spain, France and Belgium.
- It is a young tourism.
- They mainly stay in the south of the island.
- They are active and highly mobile tourists.
- 7% travelled to Tenerife with the express intention of going paragliding.
- They demand an improvement in transport so that it is more suited to the activity.

Data relating to the offer

Resources

At present there is no infrastructure with proper signs or adequately equipped for landings or take offs. That is why supervision by pilots and instructors or local companies is very important.

The main flight zones with easy access are the following:

- North-Los Realejos.
- Southwest-Adeje.
- East-Güímar.

On the official tourist web of the island webtenerife.com six paragliding points are promoted, endorsed by the Canary Island Air Sports Federation:

- Ifonche-Vilalfor.
- Izaña.
- La Corona-Los Realejos.
- The Güímar mountainside.
- Taucho-Adeje.
- The Fasnía Volcano.

Infrastructure

The infrastructure required for the activity consists of small facilities for the take-off and landing areas, such as windsocks to indicate the direction and intensity of the wind, and the marking out of folding zones.

The Strategic Framework for Island Development (MEDI) 2016-2025 foresees investments related to this activity, such as the preparation and signalling of take-off and landing points, as well as information panels, in several specific programmes:

- Programme 1.4 TF Sports.
- Programme 4.6 Tenerife and the Sea.
- Programme 4.7 Programme for the Improvement of Tourism Products.

The Tenerife Tourist Board and the Department of Tourism are working in coordination with the Canary Island Air Sports Federation and the Island Council Sports Department to analyse the different points for carrying out this activity, its current status and possibilities for intervention.

Business Offer

According to data from the Canary Island Air Sports Federation there are seven official paragliding schools and estimate that there are a dozen companies operating in Tenerife.

Legal and jurisdictional orders that regulate the activity

- Royal Decree 57/2002, of 18 January, approving the Regulation of Air Circulation, which regulates aspects of air traffic.
- Law 31/1988 on the Protection of Astronomical Quality of Observatories of the IAC, known as the Sky Law and Regulation 243/1992, which regulates air traffic control over observatories to avoid interference.
- Decree 153/2002, of October 24, approving the Master Plan for Use and Management of the Teide National Park. The regulations establish that, in general, no type of flight (hang gliding, paragliding, ballooning or similar) can be carried out in the National Park, except for paragliding at km 33 on the TF-24 road.
- Permits for paragliding in protected natural areas. Each zone has an ordinance that regulates the uses and activities that can be carried out in that space.
- Two-seat sports qualification for paragliding pilots.
- Statutes of the Canary Island Air Sports Federation.

As a tourist activity, in addition, it should be taken into account:

- The communication of tourist activity to the General Directorate of Tourism Planning and Promotion. Art. 13.2 a) of Law 7/1995, of 6 April, on the Planning of Tourism in the Canary Islands.

- Decree 37/2014, of 9 May, amending Decree 89/2010, of 22 July, by which the activity of tourist intermediation is regulated. Responsibility of the Department of Tourism, Culture and Sports of the Government of the Canary Islands
- Authorisation of complementary private transport by the Island Council. Law 13/2007, of May 17, on Road Transport Planning in the Canary Islands and Decree 72/2012, 2 August, approving the Regulations for the development of Law 13/2007, May 17, on Road Transport Planning in the Canary Islands.

The Government of the Canary Islands, through the General Directorate of Tourism Planning and Promotion, made public on April 21, 2017, the Draft Decree approving the regulation that establishes the legal regime for the practice of active tourism activities.

Current promotional activity

- It is an activity that is promoted within the specialised promotional brand in active tourism, 'Tenerife No Limits'.
- Map of air and land activities, which reflect the take-off and landing areas.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Resources for the inspection and control of the activity. ■ Promote safety conditions for the activity. ■ Adaptation of the regulations to current tourist and environmental needs. 	<ul style="list-style-type: none"> ■ Innovative formulas that maximise the economic and human resources of the administrations responsible for control. Assess the creation of a surveillance figure authorised by all administrations and / or the application of ICT. ■ Specific regulations for the activity and the Active Tourism Decree proposal. ■ Study to review the regulations and modification proposal. 	A_01
<ul style="list-style-type: none"> ■ Condition zones for paragliding activity. ■ Improvement of the facilities for information about risks and flight locations. 	<ul style="list-style-type: none"> ■ Include in the different improvement plans infrastructure and facilities in zones of take-off and landing. 	A_02
<ul style="list-style-type: none"> ■ Intensify the specialised promotion of the product. 	<ul style="list-style-type: none"> ■ International championship event, specialised press trips, the FLYPA International Paragliding Festival. ■ Analyse the possibility of creating specialised material on the activity. 	A_05

ANNEX

13

Astro-tourism

Relevant data of the activity

Astro-tourism is an activity that allows millions of people who are passionate about astronomy to experience the joy of star gazing, an activity which is motivated by the interest that the immensity and mystery of the sky awakens in people.

This tourist pursuit is an excellent opportunity for the Canary Islands and for Tenerife given the worldwide recognition of the cleanliness and quality of its atmosphere. The archipelago is currently considered one of the four places in the world called "Windows to the Universe" for the exceptional suitability of its skies for astronomy, together with Hawaii, northern Chile and Baja California.

Data relating to demand

Data collected by the Tenerife Tourist Board in the *Survey on the tourism that visits Tenerife 2015-2016* (Tenerife Island Council).

Volume of demand

The activity was done by between 2% -2.6% of the tourists that visited Tenerife in 2015 and 2016, which means an approximate demand of 136,000 visitors.

Economic contribution

Star gazing generates income of about 8.5 million euros directly from the activity, with tourists spending an average of €63 per person. The income generated by holidays globally in this sector is estimated at 117 million euros.

In the last year the demand for this activity has increased considerably, as well as the average expenditure per person on the same, which has resulted in a significant increase in the income generated.

Visitor Profile

- Germany and Spain stand out as important markets, although the local, Dutch, Russian, Swiss and Austrian markets are also significant. The British market, although of importance, has a relatively low share when compared to its overall tourist numbers.
- Tourists tend to be middle-aged.
- About 58% are travelling to Tenerife for the first time.
- Conventional accommodation predominates in the areas of Costa Adeje and Puerto de la Cruz.
- In addition to the weather, this sector was very attracted to the natural elements of the island, such as landscapes, nature, sea

and beaches. However, observation of the stars is not mentioned as a motivational aspect of the trip to Tenerife, which points to it being a more recreational activity to be done during the holidays.

- A majority of the people surveyed visited the Teide National Park, a strategic point for the observation of stars on the Island.
- The tourists who go star gazing also tend to combine it with others, especially hiking, visiting theme parks, whale watching, birdwatching, as well as playing sports, doing nautical activities or having health treatments.

Data relating to the offer

Resources

In recent years star gazing has been added to the leisure activities offered to people who visit Tenerife, whose main resource, the sky, has an exceptional quality.

Not in vain the **Teide National Park** is the place where the Izaña Observatory is located, in its Peripheral Protection Zone. It is an observatory that focuses its studies on the sun and has the best European telescopes. The observatory offers **guided tours** to groups and students throughout the year and has **information panels** in its grounds and audio-visual resources that offer information about astronomy.

Likewise, two decades ago the **Astrophysics Institute of the Canary Islands (IAC)** established smart lighting and the effective protection of astronomical observation with the approval of the Sky Law in 1988. In order to implement this law, the Technical Office for the Protection of the Sky (OTPC) was created in 1992, in order to control and assess pollution generated by incorrect lighting.

In addition, since 2013, El Teide has been certified as a **'Starlight' tourist destination** and the summits of Tenerife as a **'Starlight Reserve'**.

In the Teide National Park there are seven information panels that constitute a **route of Astro-volcanic Areas** that allows visitors to contemplate the landscape of the National Park and to relate it with different places in the solar system.

Business Offer

All these resources favour astro-tourism activities and services. At present, in addition to the Izaña Observatory, there are fifteen companies that provide guided routes with observation of the stars.

Many of the companies offering nature activities have included star gazing in their catalogue of services and there are also thirty-seven accredited 'Starlight' guides in Tenerife, who have specialised knowledge and work either as self-employed or through active tourism companies.

Infrastructure

This activity has available a series of facilities and infrastructures, among which are:

- The Teide National Park Observatory.
- Information panels (astro-volcanic areas) located at different viewpoints throughout the Teide National Park:
 - The Los Azulejos Viewpoint.
 - The Boca Tauce Viewpoint.
 - The Minas de San José Viewpoint.
 - The Tabonal Negro Viewpoint.
 - The Zapato de la Reina Viewpoint.
 - The Roques de García Viewpoint.
 - The cable car facilities.

Legal and jurisdictional orders that regulate the activity

- Law on the Protection of the Astronomical Quality of the Observatories of the IAC (Law 31/1988) and on March 13, 1992 the Regulation that regulates it (R.D. 243/1992). Responsibility of the Government of the Canary Islands.

Being an activity carried out mainly in the area of the Teide National Park, the regulations applied come from the Department of the Environment of the Island Council, which is the entity that manages this protected area after the transfer of its management by the Department of Territorial Policy, Sustainability and Safety of the Government of the Canary Islands, formalised on 3 February, 2016.

- Decree of January 22, 1954, Declaration of National Park.
- Law 5/1981, of March 25, 1981, Reclassification of National Park.
- Resolution of October 14, 1999 (BOE, nº 310, of April 28, 1999). Extension of the Teide National Park.
- Decree 153/2002, of October 24, approving the Master Plan for Use and Management of the Teide National Park (BOC, Nº 164, of December 11, 2002).
- Royal Decree 1550/2009, of 9 October, on the extension of the functions and services of the State Administration transferred to the Autonomous Community of the Canaries, in the matter of nature conservation (National Parks of Teide, Timanfaya, Caldera de Taburiente and Garajonay, BOE, nº 270, of November 9, 2009).
- Decree 226/2009, of December 3, of the president, which assigns to the Department of the Environment and Territorial Planning the management of National Parks, transferred by Royal Decree 1,550 / 2009, of October 9.
- Legislative Decree 1/2000, of 8 May, approving the Consolidated Text of the Laws of Ordinance of the Canary Islands and Natural Areas of the Canary Islands.

- Law 31/1988 of 31 October on the Protection of Astronomical Quality of the Observatories of the Astrophysics Institute of the Canary Islands (also known as the Sky Law), which establishes a set of measures aimed at guaranteeing the quality of the observatories of the Astrophysics Institute of the Canary Islands and limiting outdoor lighting, as well as the installation and operation of radio stations and the establishment of industries, activities which could potentially pollute the atmosphere.

As a tourist activity it should also be considered:

- Decree 50/2011, of April 8, which establishes the formats and characteristics of the distinctive plaques for tourist establishments for accommodation, restaurants and tourist intermediation.
- Decree 13/2010, of February 11, which regulates access to and exercise of the profession of tourist guide in the Autonomous Community of the Canary Islands. Decree 9/2013, of February 19, introduces some modifications to this standard.
- Law 7/1995, of April 6, on Tourism Planning in the Canary Islands.
- Law 14/2009, of December 30, which amends Law 7/1995, of April of Tourism Planning in the Canary Islands. Legal competency: Department of Tourism, Culture and Sport of the Government of the Canary Islands
- Decree 115/2015, of 22 May, amending the Regulations for the development of Law 13/2007, of May 17, Road Transport Planning in the Canaries, approved by Decree 72/2012, of 2 of August.
- Decree 72/2012, of August 2, which approves the Regulations for the development of Law 13/2007, of May 17, on Road Transport Planning in the Canaries, which includes the regulation of public passenger transport and complementary public and private tourist transport. Legal competency: Department of Public Works and Transport of the Government of the Canary Islands

Actions to improve the activity

This ecotourism activity has been promoted and developed in recent years through projects that have endowed it with both the necessary support facilities for its correct development and measures to improve the quality of the service carried out by companies.

The main projects and measures carried out so far have been the following:

Through the Aid for the Conservation, Protection and Dissemination Projects of World Heritage Assets granted by the Department of Education, Culture and Sport, presented in the last four meetings, and granted in two of them (carried out between 2013-2014 and 2015-2016), a number of measures have been launched, among which stand out:

- To promote knowledge of the Teide National Park as the main astro-volcanic resource of the island: the project consisted in the

creation of a route of astro-volcanic areas composed of seven thematic information panels that form a self-guided path and which is linked to points of high intrinsic and scenic value. At these seven points information panels of a clear descriptive and didactic character were placed, which bring visitors to the Teide National Park closer to the link between volcanology and astronomy, as well as the similarity between the observed space and other places in the galaxy. The idea is to combine the tourism of volcanoes with that of the stars, providing an experience which is unique in the world: to make visitors feel that they are on a planet that is part of a planetary system.

- Definition of sustainable and quality criteria for the activities that take place in the Teide National Park, one of them being astro-tourism.
- Formative measures to promote new tourism products linked to the Teide National Park.

The 'Skyroute' project was presented at the European meeting for the development of transnational cultural products (COSME 2012), implemented from December 2013 to June 2015, whose main measures were:

- Carrying out an inventory of resources related to astro-tourism.
- A study of the state of astro-tourism on the island and in other places where the activity is carried out.
- The creation of a European astro-tourism route. In the case of Tenerife, a seven-day package was carried out which contained different related tourist activities.
- Testing the main activities related to star gazing with different tourism agents.

Astro-tourism, an activity that respects the environment, is at risk of diminishing its sustainable condition since at present it is carried out exclusively in the Teide National Park and is concentrated at a few strategic points (viewpoints). A large number of companies and tourists could detract from or impoverish the experience of enjoying a unique place and an extraordinary sky.

Therefore, the coordination and the joint work between the administrations and the tourist industry are important so that this activity does not lose its sustainable character. A public-private commitment is needed that protects the fragility of the natural and cultural environment where this activity takes place.

In this line, joint work has been carried out with the business community to analyse the problems of carrying out the activities in the National Park and to study proposals to resolve them. These proposals are set out in a ten point document of commitments made by the business community in an attempt to always carry out the activity in a way that ensures conditions of quality and environmental sustainability.

Given the ideal conditions of the Teide National Park for the observation of stars, the area around the Corona Forestal Natural Park, also recognized as a Protected Natural Area, is being considered as a suitable place to set up observation points for

the activity. This project is already included among the measures contemplated in the MEDI (program 4.7) as well as in the Integrator project.

Current promotional activity

- Activity promoted through all the channels of communication and promotion available to the Tenerife Tourist Board.
- It is included as a compulsory activity in all fam trips and press trips that are organised, since it is an activity directed at all tourist sectors.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Preservation of the night sky. ■ Support of entities related to the activity for the conservation of the quality of the sky. 	<ul style="list-style-type: none"> ■ Local regulations that contribute to the reduction of light pollution. ■ Commitment of all those involved in the awareness of the importance of light pollution. 	A_01
<ul style="list-style-type: none"> ■ Improve the areas and facilities where the activity takes place. ■ Improvement of the basic facilities for the development of astro-tourism. 	<ul style="list-style-type: none"> ■ Creation of a network of photometers indicating the levels of sky darkness. ■ Complement this network with a system of cameras that allows potential users to schedule their visits, excursions or activities in viewpoints, parks and stellariums. 	A_02
<ul style="list-style-type: none"> ■ Improvement of general infrastructure in the Teide National Park. 	<ul style="list-style-type: none"> ■ Need to condition public toilets in other parts of the Park. ■ Condition parking areas. 	A_02
<ul style="list-style-type: none"> ■ A top quality visitor centre 	<ul style="list-style-type: none"> ■ Use the latest technologies to give information about astro-tourism and astronomy. New concepts associated with information, experiences, the performance of shows, etcetera. The ideal location should be studied with regard to the National Park and the Teide Observatory. 	A_02 A_06
<ul style="list-style-type: none"> ■ Development and specialisation of demand. 	<ul style="list-style-type: none"> ■ Development of products integrating the components of the offer (viewpoints + routes + specialized guides + activities + others) guaranteeing the quality in all the links of the value chain. ■ Development of hybrid products: astro-tourism and gastronomy, astro-tourism and health, etcetera. ■ The creation of products based on activities that start during the day, take advantage of the sunset and continue at night is an opportunity still not completely taken advantage of. 	A_04 A_05 A_06
<ul style="list-style-type: none"> ■ Specialisation of the offer. 	<ul style="list-style-type: none"> ■ To promote the specialisation and differentiation of the companies that offer services related to astro-tourism through the theming of their products, attending not only to image criteria but also to the quality of the service offered. 	A_04
<ul style="list-style-type: none"> ■ Theming of resources. 	<ul style="list-style-type: none"> ■ The creation of unique thematic itineraries, with specialised footpaths offers a specific development opportunity. 	A_04
<ul style="list-style-type: none"> ■ Decongestion of peak hours to avoid the agglomerations observed in the Teide National Park. 	<ul style="list-style-type: none"> ■ Enjoyment of the sunset as a potential tourist experience. 	A_04 A_08

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Promotional visibility of the activity. ■ Differentiate the image of the destination, attract tourists interested in these features. 	<ul style="list-style-type: none"> ■ Celebración de eventos especializados. ■ The holding of specialised events. ■ Promote the fact that the destination has cleaner and darker skies than in the rest of Europe. 	A_05
<ul style="list-style-type: none"> ■ Better regulation of the activity. 	<ul style="list-style-type: none"> ■ To foster a guild culture aimed at self-regulation, which should be encouraged and accompanied by opportunities for training, accreditation, visibility and certification. ■ Strategy for creating informal clusters. 	A_01 A_06
<ul style="list-style-type: none"> ■ Better knowledge of demand. 	<ul style="list-style-type: none"> ■ Study of the demand, their preferences and interests. 	A_07
<ul style="list-style-type: none"> ■ Improve the quality and sustainability of the activity in the areas of greater environmental fragility. ■ Regulation of the flow of visitors. 	<ul style="list-style-type: none"> ■ Put in place a commitment to some criteria that assures the quality of the activity by the companies involved in it. ■ Measures to study the flow of visitors which will help to reduce saturation of certain places and avoid periodic overcrowding. ■ Regulation of the transport flow. 	A_08
<ul style="list-style-type: none"> ■ Knowledge of the culture of the protection of the sky. 	<ul style="list-style-type: none"> ■ Educational programmes in schools ■ Awareness campaigns to reduce the consumption of light. Example: festivals (carnival). 	A_08 A_10
<ul style="list-style-type: none"> ■ Qualifications for entrepreneurs and tourist professionals 	<ul style="list-style-type: none"> ■ Quality training programmes to disseminate knowledge of the sky. Training of "sky guides". 	A_10
<ul style="list-style-type: none"> ■ Campaigns to raise public awareness. 	<ul style="list-style-type: none"> ■ Bringing the subject of the stars closer to the local population and to tourists in the environs of the municipalities is considered an opportunity, with products like programmed blackouts, programmes of science, wines and stars, information about our internationally accredited night sky etcetera. 	A_10

ANNEX

14

Sailing

Relevant data of the activity

Sailing as an activity includes everything from excursions at sea and the chartering of boats, with or without a captain, to the ships that cross the Atlantic to reach the Canary Islands.

Tenerife has exceptional conditions for sailing thanks to the mild climate and an average wind speed of fifteen knots. This is a reason why the Archipelago is a stopping off point of stop for sailors who want to cross the Atlantic.

In particular, sail boating has a high seasonality as the Atlantic crossings take place in the winter season.

Data relating to demand

Data collected by the Tenerife Tourist Board in the *Survey on the tourism that visits Tenerife 2015-2016* (Tenerife Island Council). These data include sailing activity as a whole (sailing boats / sport fishing).

Volume of demand

This activity was done by 2.7% of the tourists that visited Tenerife in 2015, which represents a figure of 132,000.

Economic contribution

Sailing generates 8.6 million euros for Tenerife from direct spending on the activity, with an average expenditure of €65-€70 per person. Income from the total expenditure on holidays for this sector amounts to 119 million euros.

Visitor Profile

- The main markets of origin are: the United Kingdom, Spain, the United States, Russia, France, Italy and Ireland. The Nordic markets are also important.
- It is a young sector, with tourists having an average age of about forty.
- Family tourism accounts for a significant part (21%).
- Average stay of ten days, higher than the average for tourists.
- They prefer apartments and private homes, the type of accommodation usually associated with family tourism.
- Most stay in the south. 59% between Costa Adeje and Las Américas-Arona.
- They are active and highly mobile tourists, who also take part in other activities related to the sea.

- High level of organisation of the trip via the Internet.
- The important factors for choosing Tenerife are related to the coast, such as the sea, the beach, nature and the landscape.

Data relating to the offer

Infrastructure / Business Offer

Marinas from which the activity is offered: Marina del Sur, San Miguel, Puerto Colón and Los Gigantes. Although currently the offer of free moorings is reduced to just two ports (Marina del Sur and San Miguel), there is a wide range of boat trips and chartering in all marinas.

MAIN TOURIST PORTS	TOTAL NUMBER OF MOORINGS
Marina del Sur	176
San Miguel	344
Puerto Colón	364
Los Gigantes	372

Source: *Guide to ports in the Canaries 2014*. PROMOTUR

Within the Strategic Framework for Island Development (MEDI) investment related to this activity is envisaged in specific programmes to improve services in and accessibility to the main ports from which excursions by sea depart:

- Programme 1.4 TF Sports.
- Programme 3.5 Port Development Strategy, which includes the Port of Fonsalía and Puerto de la Cruz.
- Programme 4.6 Tenerife and the Sea.
- Programme 4.7 Programme for Improvement of Tourism Products.

Legal and jurisdictional orders that regulate the activity

- Order of December 4, 1985 for the rental of pleasure boats and Service Instruction No. 6/98, issued by the General Directorate of the Merchant Navy, which provides an updated interpretation of the Order.
- Royal Decree 1027/1989, of July 28, on flags, ship and maritime registration.
- Law 12/2007, of April 24, on Maritime Transport Planning in the Canary Islands, legal competency of the Government of the Canary Islands. The Department of Public Works and Transport of the Government of the Canary Islands is in charge of maritime authorisations for the hiring of boats with or without fixed crew.
- Law 1/2009, of 10 February, which amends Law 12/2007, of April 24, on Maritime Transport Planning in the Canary Islands.

- Law 14/2014, of July 24, on Maritime Navigation.
 - Royal Decree 804/2014, of 19 September, which establishes the legal regime for safety standards and the prevention of pollution from recreational vessels carrying up to twelve passengers.
- As a tourist business it must be considered:
- Law 7/1995, of April 6, on Tourism Planning in the Canary Islands. Legal responsibility of the Department of Tourism, Culture and Sport of the Government of the Canary Islands.
 - Decree 37/2014, of 9 May, amending Decree 89/2010, of July 22, regulating the activity of tourist intermediation. Legal responsibility: Department of Tourism, Culture and Sport of the Government of the Canary Islands.
 - Decree 72/2012, 2 August, approving the Regulations for the development of Law 13/2007, May 17 (BOC 104, 24.5.2007, BOE 143, 15.6.2007), Road Transport Planning in the Canary Islands. Responsibility of: Department of Public Works and Transport of the Government of the Canary Islands.

Current improvement measures

As for other maritime activities, the Island Council Department of Sports has launched the 'Tenerife + Azul' project with the aim of contributing to the promotion of an economic sector and knowledge related to the sea, as well as collaborating in the positioning of Tenerife as a destination of reference in the field of national and international sport through the organisation of sporting events.

This project, together with that of 'Tenerife and the Sea', both included in the Multi-Annual Strategic Framework for Actions for the Development of Tenerife 2016-2025 (MEDI) contain measures to improve the product, both in relation to access as well as in terms of information, communication and promotion of the activity.

The Tenerife Tourist Board attends to and transfers the demands and problems of this sector of activity to the corresponding authorities.

Current Promotional Activity

There is no specific promotion, although PROMOTUR publishes a map of the marinas in the Canary Islands.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ The activities carried out at sea are characterised by the wide variety of public administrations with authority over them, which means: <ul style="list-style-type: none"> ■ Difficult coordination between the administrations involved. ■ Scarce and skewed controls and inspections. ■ Business management is hindered. ■ It is difficult to implement the tourism product. ■ A need to approve regulation in the sector that includes, among other things, activities at sea (Active Tourism Decree) that will serve as a clarifying tool for the different administrations involved. 	<ul style="list-style-type: none"> ■ Consolidation of a working group for the permanent coordination of the activity. ■ Innovative formulas that maximise economic and human resources in the administrations responsible for control. Assess the creation of a surveillance figure authorised by all administrative bodies and / or the application of ICT. ■ Promote regulations that are being worked on by the Government of the Canary Islands. 	A_01
<ul style="list-style-type: none"> ■ Improvement of services in some marinas. 	<ul style="list-style-type: none"> ■ Coordination with the concessionaires of the marinas. 	A_02
<ul style="list-style-type: none"> ■ Low compatibility with other tourist activities. 	<ul style="list-style-type: none"> ■ Promote the combination of sailing with other tourist activities. 	A_04 A_08
<ul style="list-style-type: none"> ■ Need to define maximum capacity in some places. 	<ul style="list-style-type: none"> ■ Study of maximum capacity in areas classified as special conservation. 	A_08
<ul style="list-style-type: none"> ■ Social awareness about natural resources and their sensitivity. 	<ul style="list-style-type: none"> ■ Publicity campaigns and environmental awareness. 	A_10



ANNEX

15

Birdwatching

Relevant data of the activity

The temperate climate of Tenerife allows bird watching at any time of the year. However, the best time to observe migratory species such as the arctic tern or the sooty shearwater is between late summer and early autumn.

Data relating to demand

Volume of demand

Data collected by the Tenerife Tourist Board from the *Survey on tourism that visits Tenerife 2015-2016* (Tenerife Island Council) has established that the activity of bird watching accounts for close to 1% of the tourists that visit the island, which amounts to about 41,000 visitors.

Data relating to the offer

Resources

- Some seventy breeding birds are known in Tenerife, several of them endemic. Of ornithological interest are the bluefinch, the laurel pigeon, Bolle's pigeon, the Barbary falcon, the Canary chiffchaff and the Tenerife goldcrest.

- There are twenty-one points distributed in both mountain mid-altitude areas, as well as on the coast where conditions for watching these birds are ideal.

Infrastructure

- The island trail network.

- The island viewpoint network.

- This activity can be enjoyed in most of the Protected Natural Areas. In addition, there are small facilities that help to make the experience more enjoyable.

- The island has a wide range of accommodation: shelters, campsites, camping areas and mountain refuges that facilitate this activity. It also has a wide and diverse network of facilities for public use to make contact with nature easier. Many of them are within protected areas.

TYPE	Nº	Within Protected Natural Area	Connected with footpaths
Caravan parks	4	1	2
Hostels	2	2	2
Mountain shelters	1	1	1
Parador Nacional	1	1	1
Camping Zones	20	14	10
Campsites	4	4	4
Recreation zones	52	20	18
Viewpoints	70	-	-

Source: Environmental Department. Tenerife Island Council

The Strategic Framework for Island Development (MED) 2016-2025 includes specific investment for the adaptation of small infrastructures for bird watching in **Programme 4.7 of the Tourism Product Improvement Plan**.

Business Offer

Specialised business offers are scarce.

Legal and jurisdictional orders that regulate the activity

Birdwatching does not have specific legislation, although the activity may be affected by the rules associated with protected natural areas if it takes place there.

The Canary Island Government, through the General Directorate of Tourism Planning and Promotion, made public on April 21, 2017, the Draft Decree approving the regulation establishing the legal framework for the development of approved active tourism activities.

Actions to improve the product

The following projects have been developed to boost the activity:

- Analysis of the main points for bird watching.
- Drafting of a needs plan for small-scale facilities to favour the development of the activity.

- There is a strategy for the development of this tourist activity in the area of Macaronesia, conducted by SEO Birdlife. http://www.seo.org/wpcontent/uploads/tmp/docs/jp_folleto_iberaves_castella.pdf

Current Promotional Activity

Information on the activity, on sighting points and on the most relevant bird species can be found at www.webtenerife.com

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> Support of entities related to the activity for the conservation of the resources involved. 	<ul style="list-style-type: none"> Commitment of all the participants involved in raising awareness about the importance of this natural resource (also affected by light pollution) 	A_01
<ul style="list-style-type: none"> Facilities for bird watching. 	<ul style="list-style-type: none"> Installation of small-scale facilities for bird watching (trails, shelters, information panels). 	A_02
<ul style="list-style-type: none"> Collection of specific demands and development of products linked to the activity. 	<ul style="list-style-type: none"> Develop products integrating the components of the offer, thus ensuring quality in all links of the value chain. Development of hybrid products: bird watching and gastronomy, birds and hiking, and so on. 	A_04
<ul style="list-style-type: none"> Promotional visibility of the activity. 	<ul style="list-style-type: none"> Celebration of specialised events. 	A_05
<ul style="list-style-type: none"> Improve knowledge about demand, resources and offer on the island. 	<ul style="list-style-type: none"> Analysis / inventory of existing resources. Study of the demands, preferences and interests of the tourists. 	A_07
<ul style="list-style-type: none"> Awareness and education about birds. 	<ul style="list-style-type: none"> Information campaigns on the world of birds. 	A_08 A_10
<ul style="list-style-type: none"> Training of guides. 	<ul style="list-style-type: none"> Specialised training for activity companies so that they can include birdwatching in their offer of services. 	A_10

ANNEX

16

Congresses, conventions
and incentive travelRelevant data
of the activity

The congress and incentive travel sector organised more than twenty thousand meetings in Spain in 2016 and moved more than 3.7 million attendees to congresses, conventions, incentive trips and product presentations.

The study by Madison Research, commissioned by the Spain Convention Bureau (SCB), estimates an economic impact of over 5.7 billion euros for the fifty-five Spanish cities associated with the SCB.

After a few years of stagnation due to the crisis and the international geopolitical situation different international indicators show a moderate growth of the sector for 2017. In Tenerife the latest data produced by the Tenerife Tourist Board shows a total of 890 organised meetings and 45,000 attendees.

Data relating
to demand

Promoters and event organisers are mainly looking for destinations that are easily accessible, well connected, safe, with good infrastructure for congresses and with tourist and natural attractions that serve as a motivation for attendance.

Different factors have led to a significant increase in the demand for Tenerife in recent years, among which are: the improvement of air connections, which has facilitated the opening of new markets; the development of congress centres and the opening of new hotels with conference rooms, which has allowed the holding of major events. Finally, the political instability in many of our competing destinations has contributed to a considerable increase in demand, which, in many cases, the supply capacity of Tenerife can not fully satisfy.

Data relating
to the offer

Despite the growth in demand, the island's offer aimed at the sector of Meetings, Incentives, Conferences, and Events / Exhibitions (MICE) has been reduced in the last two years for two main reasons:

- Although the number of hotels offering these services has grown, with the Tenerife Convention Bureau now having twenty-five hotels offering congresses, the significant increase in tourist holiday demand has generated competition for this MICE sector, reducing the number of accommodation places offered in hotels. This results in an important loss of competitiveness on the Island for the MICE sector, especially for those of more than five hundred participants or for conventions that require all their participants to be in a one place.

- A change of focus of the main congress centre in Tenerife (MAG-MA), which is directing its offer more to the celebration of music festivals than to the organisation of congresses. This new management policy has produced a significant decrease in the number of congresses organised in this area.

- The rest of the congress centres on the island have limitations of structure and facilities for the holding of congresses. Furthermore, MICE activity competes with the holding of other types of events, in particular, cultural events.

The opening of new hotels in 2016 and 2017 has enabled, however, the confirmation of major events in Tenerife and the possibility of increasing the offer for future projects on the island.

Another important element in the congress offer is the availability of unique spaces for the celebration of outdoor events, outside hotels. Tenerife has about ten places that are used for events, and there is great potential for growth in the offer of special places that serve to renew the offer of venues. Nevertheless, the holding of events in these places, normally nature areas, must be subject to the conditions of regulation and use.

Business Offer

The island has the following offer:

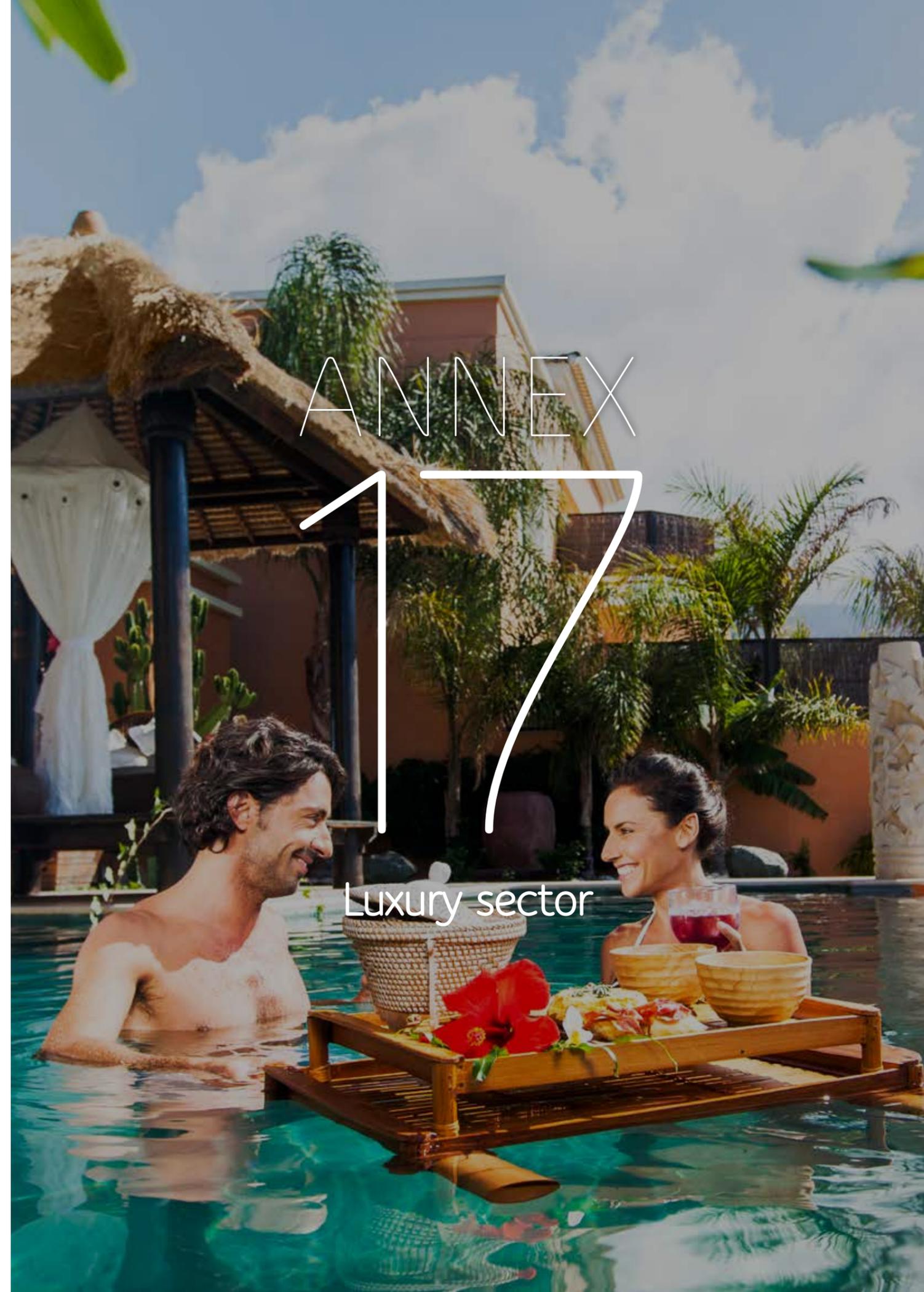
- 25 hotels with conference rooms of different capacities, up to 2,000 attendees.
- 5 congress centres.
- 9 specialised destination management agencies.
- 10 alternative venues for meetings.
- 18 companies of conference services (catering, hostesses, restaurants, stand builders, audio-visual companies, activities and excursion companies, etc.).

Current Promotional Activity

- Presence at international trade fairs, workshops and roadshows.
- Organisation and collaboration with national and international fam trips.
- Organisation of large events in Tenerife for professional conference organisers.
- Specific actions on social networks.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Availability of accommodation for the MICE sector. ■ Have alternative meeting places and single venues 	<ul style="list-style-type: none"> ■ Incorporation of new hotels into the Tenerife Convention Bureau (TCB) brand. ■ Valuing and conditioning of historic buildings, industrial sites and cultural centres for events. 	A_02 A_04
<ul style="list-style-type: none"> ■ Promotion of the new offer for congresses. ■ Promotional material which is more accessible and adjusted to the needs of this sector. 	<ul style="list-style-type: none"> ■ Complete renewal of promotional material and web with new tools for MICE professionals ■ Bulletins and informative newsletters for professionals in the sector 	A_05
<ul style="list-style-type: none"> ■ Clear policy of joint promotion of the Canary Islands towards the MICE sector. 	<ul style="list-style-type: none"> ■ Cooperation with Promotur and with the other Convention Bureaux on the Islands for joint actions. 	A_01 A_05
<ul style="list-style-type: none"> ■ Offer more activities to this sector. 	<ul style="list-style-type: none"> ■ Creation of themed proposals for groups that reflect the cultural identity of Tenerife (Carnival, volcanoes, gastronomy). 	A_04 A_06
<ul style="list-style-type: none"> ■ Improvement of the response to requests for information from MICE professionals. 	<ul style="list-style-type: none"> ■ Recruitment and design of customer care software (CRM). 	A_06
<ul style="list-style-type: none"> ■ Improvement of knowledge about congresses on the island. 	<ul style="list-style-type: none"> ■ Implement improvements to current information collection. 	A_07



Data relating to demand

There is no specific information regarding the luxury tourist sector in Tenerife, so knowledge is gained from the only statistical data available, i.e. tourists staying in five-star hotels and tourists with high family incomes. This does not literally mean that one or the other are identified with the luxury sector.

The five-star sector accounted for slightly more than 10% of visitors to the island in 2016, which represents a figure close to 580,000 people. As far as the upper income sector is concerned, it accounts for 14% of tourism, which means approximately 795,000 tourists.

Visitor Profile

- The average age of luxury tourists is between 35 and 55 years. In the case of Tenerife, the average age is around 49 years.
- Mostly they travel as couples, a tendency that is common to the profile of this type of tourist, followed by families. The number of families looking for holidays within the luxury sector is on the rise and is expected to grow significantly in the coming years.
- If you look at data from five-star hotels, the main markets are: the United Kingdom, Spain, Germany, Belgium, Italy and France, behind which are Switzerland, Russia and the Netherlands. In the case of high-income tourism, the most relevant markets are the United Kingdom, Germany, the Netherlands, the Nordic markets, Belgium, Switzerland and Austria.
- Total expenditure doubles the average of other visitors.
- Travellers in the luxury sector are looking for quality and unique high end experiences. They do not seek mass travel, but differentiated travel and tailor-made experiences.
- Concepts such as exclusivity and privacy are paramount for these tourists, in fact, they are the main factors that motivate them when choosing their trip. The quality of the accommodation is another aspect that influences their choice of holiday.

Data relating to the offer

As far as quantification is concerned, it is difficult to establish the number of tourism companies oriented to the luxury sector. Except for accommodation, which is categorised according to current regulations and is easily identifiable, the establishments providing services are not always exclusively operating in the luxury market. Many companies combine activities aimed at different customer profiles, from luxury, to active tourism, to golf, to that of incentive travel and congresses, and so on.

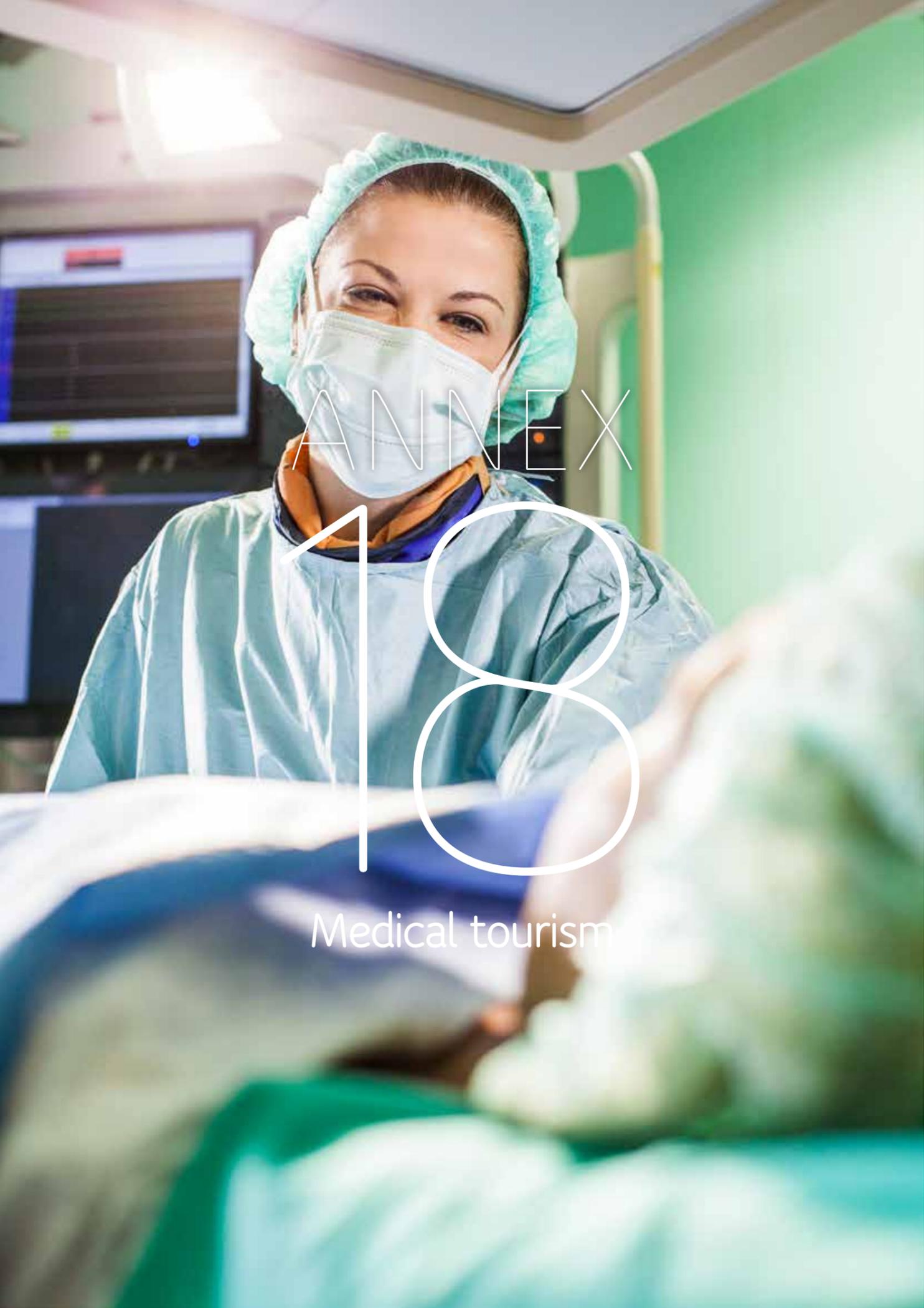
- According to data from 2016, the island has 12,850 authorised accommodation places in the category of five stars distributed among twenty-seven establishments.
- With the eleven newly built high-end five-star and five-star Grand Luxury establishments, Tenerife is set to increase its capacity in this sector.
- The five star hotels on the island represent 10% of the accommodation offer in Tenerife. The new additions to the high-end sector, (4,095 beds in new constructions and 2,990 reclassified as five star from other categories) added to the existing places, will reposition the supply of accommodation in the upper five-star sector in Tenerife with 19,943 future places. This volume of beds is going to mean that the five star sector will increase its quota to 14% of the total accommodation offer on the island.
- The service companies linked to the luxury sector are: car rental, sailboats and yachts, restaurants, shopping malls and spas, among others.
- Holiday home rentals also proliferate in the luxury sector.

Current Promotional Activity

- The Tenerife Tourist Board created "Tenerife Select" more than a decade ago to promote the island as a luxury tourism destination. At present, the brand has forty associates whose distribution according to type is: twenty-two accommodation establishments, three companies of receptive tourism, two theme parks, three shopping centres, a yacht, three networks of hospitals and clinics, a luxury transfer company, a wedding planner service, two beach clubs, a grand venue for conferences and shows, and a cable car.
- Not all companies related to the luxury sector come under the promotional umbrella of the 'Tenerife Select' brand, which only represents a part of the existing offer.
- 'Tenerife Select' also promotes health tourism, weddings, honeymoons and romantic getaways.
- There are promotional actions specific to the luxury sector, as well as joint ones with other brands such as 'Tenerife Golf'.
- The main markets for the brand are the United Kingdom, the national market, Germany, Austria, Switzerland, France, Belgium, Holland, India, Russia, Azerbaijan, Kazakhstan, Ukraine, Belarus and Italy.

Needs detected and the corresponding intervention proposals

NEEDS	INTERVENTION PROPOSALS	AXIS
<ul style="list-style-type: none"> ■ Reduce the number of robberies in the main tourist areas and places of interest that are visited by tourists. Beyond the coastal zone, in the area of the Teide National Park there are visitors who suffer daily robberies by organised gangs. 	<ul style="list-style-type: none"> ■ Increase the number of state police in the main tourist areas. 	A_01
<ul style="list-style-type: none"> ■ Adapt the supply of accommodation to the requirements of the demand. The clientele increasingly demands that hotels have, for example, plugs near the bed, USBs, more equipment in the gym, healthy food, personalised attention on arrival and departure from the hotel, and so on. 	<ul style="list-style-type: none"> ■ Greater investment in the adaptation of accommodation to achieve an attractive product for the luxury clientele. 	A_02
<ul style="list-style-type: none"> ■ Development of tourist areas in terms of accessibility, cleanliness and aesthetics in pedestrian areas and access to areas where five-star accommodation is located. 	<ul style="list-style-type: none"> ■ Improvement of tourist areas, standardisation in, for example, the signage of private establishments such as shops, restaurants, etc. 	A_02
<ul style="list-style-type: none"> ■ Improvement of roads and accesses in the southern area, congestion of roads due to the existing traffic density, and so on. 	<ul style="list-style-type: none"> ■ Investment in roads, sign-posting, and so on. 	A_02
<ul style="list-style-type: none"> ■ Improvement of the arrivals area at the airport, especially the collection of luggage in Tenerife South airport. VIP lounges. 	<ul style="list-style-type: none"> ■ Improvement and adaptation of the terminal in specific areas. 	A_02
<ul style="list-style-type: none"> ■ The need to improve the entire area that includes the port of Puerto Colón and its surroundings. From an image point of view the setting does not help to position Tenerife as a luxury destination. ■ In the main luxury destinations located in coastal areas, a well-tended marina with boats such as yachts or sailboats is synonymous with luxury. 	<ul style="list-style-type: none"> ■ Improve the areas mentioned. 	A_02
<ul style="list-style-type: none"> ■ There are no premium brands with their own shops located on the island, which means that the clientele does not perceive Tenerife as a destination of true international luxury. We are not referring to multi-brand stores that offer luxury goods by famous designers, which do exist, but to stores of great haute couture firms located on the main avenues of tourist zones. 	<ul style="list-style-type: none"> ■ At present some of the shopping centres have established agreements with some of the <i>premium</i> brands to have <i>corners</i> of well-known fashion brands on their premises. The main problem is that the big brands do not see it as profitable to establish themselves on the island because they believe that they will not obtain profits, since the average expenditure of the tourist on <i>premium</i> purchases in destination is not high (with the exception of some nationalities). 	A_02
<ul style="list-style-type: none"> ■ The existing leisure offer is far from the quality and recognition that the island's accommodation has already achieved. There are few companies that are truly oriented to the customer with high purchasing power and that can meet their needs 24 hours a day. 	<ul style="list-style-type: none"> ■ Companies will specialise as long as the customer demands this type of service. For example, there are already companies that are starting to train part of their staff to give VIP attention to their clientele. 	A_04 A_10
<ul style="list-style-type: none"> ■ Establish contacts with relevant associations linked to the industry in this sector to enhance the image of Tenerife as a luxury destination. 	<ul style="list-style-type: none"> ■ Attend events promoted by these types of associations, and consider the possibility of hosting luxury events in Tenerife. 	A_05



ANNEX

18

Medical tourism

Relevant data of the activity

It is a product still in the development stage in Tenerife for which currently there is no information about demand or data related to the offer, nor a clear delimitation of the same.

At present, the tourism activities related to this sector are limited to its promotion within the framework of the 'Tenerife Select' brand. To date, there are three partners in the brand: Quirón Salud, Grupo Hospiten and THIS (Tenerife Health International Services).

The brand is associated with the Spaincare Cluster of Health Tourism, which has the right to promote this product, both nationally and internationally. Its priority markets are the UK, Germany and Russia. On the other hand, markets such as Senegal, Morocco and other African countries are also of interest.

The main need detected is the analysis of the existing offer in Tenerife and its potential to become a tourism product set out in a specific strategic plan.



Positioning strategy of health tourism in Spain



High quality and advanced medicine

Positioning of Spain as a high-quality destination, mainly focused on treatment and surgery of medium-high complexity.

Competitive prices

Competitive prices compared to other destinations of similar quality: the UK, France and Germany

Geographic proximity

Centred mainly on those European destinations with air connections with Spain, preferably operated by low-cost companies.

Climate

The climate will be a fundamental pillar in the promotion of the destination, emphasising the advantages in the post-operative phase.

Complementing the tourist offer

Health treatments will be complemented with a varied Spanish tourist offer: cultural, artistic, gastronomic, etc.

ANNEX

19

Weddings, honeymoons,
romantic breaks

Data relating to demand

The demand for this product consists of couples celebrating their honeymoon on the island, as well as couples travelling for a celebration (without legal or religious significance).

Data relating to the offer

There is no current quantification of the existing offer in Tenerife, which ranges from hotels, estates, congress centres, wineries, vineyards, boats and beaches.

Legal and jurisdictional orders that regulate the activity

- The legislation in this respect is that which concerns the Civil Code, which does not allow foreigners to contract marriage in Spain if they are not resident in Spanish territory.
- This activity is also regulated by the rules that affect places of celebration.

Current Promotional Activity

- At present, the promotion of weddings is carried out under 'Tenerife Select'. It has a wedding planner service, as well as the hotels associated with the Brand, which are specialised in the celebration of these events.
- The priority markets for product promotion are the UK, Ireland, the domestic market, Germany and India.
- Specific promotional actions are carried out, such as specialised press trips, advertising campaigns, e-marketing campaigns, attendance at trade fairs and wedding events, among others.

Needs detected and the corresponding intervention proposals

Knowledge about this activity is needed, both from the perspective of offer and demand.

Acknowledgements



The process of drawing up the Tourism Strategy of Tenerife 2017-2020 / 2030 has represented an exemplary model of shared work, in which the world of tourism and many other areas and economic activities have come together as a team. It has had the active participation of different administrative bodies, local, island, autonomous and national, the business and professional sectors on the island, experts from different areas, the academic field and the people of Tenerife through the portal of citizen participation.

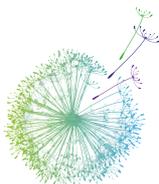
This collaborative work is a decisive step that reinforces the philosophy that permeates the whole strategy: to advance through shared management.

Agustín Espinosa	Technician Organic Fisheries Unit. Tenerife Island Council.
Aidan Mooney	Vice President ASM Consulting
Alejandro Kravietz	Director of the Miradas Doc Festival
Alejandro Molowny	Head of Technical Service for Sustainable Development. Tenerife Island Council
Amelia Escolar	Sales Manager TITSA
Ana Belén Rivero	Tourist Technician Guía de Isora Town Hall
Ana Isabel Herrero	Technical Mobility. Tenerife Island Council
Ana Esther Medina	Head of Service for Tourism Action. D.G. of Tourist Planning and Promotion. Government of the Canary Islands
Ángel Lobo	President of the Canary Surf Federation
Antonio Bentamol	Head of Service, Department of Agriculture. Tenerife Island Council
Beatriz Díaz	Innovation Manager at GF Hotels
Braulio Marrero	President of Airlines Association
Carlos Fernández	Professor at Department of Applied Economics. University of La Laguna
Carlos Rodríguez	IES Virgen de Candelaria Work Centre
Carmen de Miguel	Tourism Policy Technician. Adeje Town Hall
César Rivero	Spokesperson for the Canary Cycling Federation
Christian Miklautsch	Free Motion Shop Manager
Cristian Mejías	Manager of Garachico Viewpoint
Cristiana Oliveira	Rector of the European University of the Canary Islands
Cristina Amigó	Architect
Cristina González	SEO Birdlife Canary Territorial Delegation
Cristina Iglesias	Marketing Director Marina del Sur
Cristina Rosales	Director of Marketing and Communication TITSA
Cristóbal Rodríguez	Head of Service. Department of the Environment for the Tenerife Island Council
David Novillo	Technical director. Flyover and Sustainable Ocean
David Stroud	CEO of ASM Consulting
Diego Expósito	Team Manager of Ciclista Pelotón Tenerife
Eduardo Galván	Tourist information guide Arona Town Hall
Eduardo Parra	Professor of Digital Economy and Tourism. University of La Laguna
Eliana Bautista	Technician in Innovation and Entrepreneurship FIT Canarias
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Enrique Padrón	Manager of FIT Canarias
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Jaime Saavedra	Manager of CODE Consulting
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Joan Rodríguez	Sales Manager at Volcano Experience



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