



**TWINNED**  
By Stars

## **Deliverable D3.1 – Report on analysis of available coastal and maritime tourism products and development sites**

**TWINNEDBYSTARS**

**UNLOCKING THE POTENTIAL OF INNOVATION, CIRCULARITY, AND  
DIGITALISATION FOR ACCELERATING NEW MARINE-BASED ECOTOURISM, JOINT  
PRACTICES, AND BUSINESSES IN ORS**

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## 6 ACRONYMS & ABBREVIATIONS

<b>ABAAE</b>	Associação Bandeira Azul de Ambiente e Educação
<b>ADEAC</b>	Asociación de Educación Ambiental y del Consumidor
<b>APRAM</b>	Administração dos Portos da Região Autónoma da Madeira, S.A.
<b>CAGR</b>	Compound Annual Growth Rate
<b>CAME (analysis)</b>	Correct, Adapt, Maintain, and Explore (analysis)
<b>CLA</b>	Cruise Lines International Association
<b>CMT</b>	Comité Martiniquais du Tourisme
<b>CO</b>	Project Coordinator
<b>DREM</b>	Direção Regional de Estatística da Madeira
<b>EC</b>	European Commission
<b>EU</b>	European Union
<b>FEE</b>	Foundation for Environmental Education
<b>GDP</b>	Gross Domestic Product
<b>GPMM</b>	Grand Port Maritime de la Martinique
<b>ICT</b>	Instituto Canario de Turismo.
<b>INE-Portugal</b>	Instituto Nacional de Estadística (Portugal)
<b>INE-Spain</b>	Instituto Nacional de Estadística (España)
<b>INSEE</b>	Institut National de la Statistique et des Études Économiques (National Institute of Statistics and Economic Studies of France)



<b>ISTAC</b>	The Canary Islands Statistics Institute
<b>NGO</b>	Non-Governmental Organization
<b>of-FEEE</b>	Office Français de la Fondation pour l'Éducation à l'Environnement en Europe
<b>ORs</b>	Outermost Regions
<b>OTA</b>	Observatório do Turismo dos Açores
<b>PPS</b>	Purchasing Power Standard per inhabitant
<b>Region</b>	In this report, the area of study is collectively referred to as the "Region" or "Area of the Study", which includes the Canary Islands, Azores, Madeira, and Martinique.
<b>SDG</b>	Sustainable Development Goals
<b>SME</b>	Small and Medium Size Enterprise
<b>SREA</b>	Serviço Regional de Estatística dos Açores
<b>SWOT (analysis )</b>	Strengths, Weaknesses, Opportunities, and Threats (analysis)
<b>TEUs</b>	Twenty-foot Equivalent Units (Measure of container)
<b>UNEP</b>	United Nations Environment Programme
<b>UNWTO</b>	United Nations World Tourism Organization

## 7 SUMMARY REPORT

This report presents an in-depth analysis of maritime and coastal tourism in the Canary Islands, Azores, Madeira, and Martinique. The study is structured into several key chapters, covering various aspects such as current conditions, market trends, strategic positioning, and action plans to enhance tourism development in these regions.

The Report is Structured as follows:

1. Version History
2. Deliverable Information
3. Table of Contents
4. List of Tables
5. List of Figures
6. Acronyms & Abbreviations
7. Summary Report
8. Description of Study Objectives, Scope, and Methodology
9. Diagnosis of Current Situation
10. Strategic Positioning
11. Summary of Contents

The section titled **“Description of Study Objectives, Scope, and Methodology”** includes the objective, methodology, and the data selection and collection process, describing data sources and field campaigns (surveys and interviews). In this first section, the competitive advantages and positioning of the region's coastal tourism sector are explored in an initial stage. First, **“Tourist Preferences”** are analyzed, followed by a review of **“Market Organization”** and the organization of service providers. For this analysis, data provided by the project partners has been used, along with some public national databases.

The chapter **“Diagnosis of the Current Situation”** provides five sections: situation analysis, connectivity and accessibility to the study area, the blue economy within the area, compatibility among different sectors, and a detailed analysis of the maritime-tourism sector:

- The **“Situation Analysis”** provides a detailed assessment of the current state of this sector, including a geographical and territorial characterization in which the physical and environmental key features of the study regions are analyzed. Furthermore, a macroeconomic characterization is provided, where some economic indicators, including GDP contributions from tourism, are examined. Finally, the regulatory, administrative, and governance framework is assessed.



- **“Connectivity and Accessibility”** focuses on both maritime and air connectivity. The main ports and airports are listed, describing their infrastructural capabilities and yearly traffic in both cargo and passengers.
- While the **“Blue Economy”** section discusses sectors such as ports, cruises, marine tourism, shipyards, fisheries, renewable energy, and maritime industries in a general overview, the **“Compatibility Among Different Sectors”** section assesses how various industries coexist and their impact on tourism.

The **“Maritime-Tourism Sector Analysis”** is the core chapter in the first phase of diagnosis. This section provides a thorough examination of the maritime-tourism sector, highlighting its key components. It begins with an overview of market trends and evolution, detailing how tourism activities linked to the sea have developed over time. Conventional marinas are analyzed in terms of their infrastructure and capacity, while specialized facilities for megayachts are assessed for their role in attracting high-end tourism. The nautical charter industry is reviewed as a growing segment catering to personalized marine experiences. The cruise industry is examined in terms of its economic impact and infrastructure. Additionally, leisure and sports activities related to the sea—such as diving, surfing, and water sports—are explored for their contribution to the tourism ecosystem. Marine and coastal tourism is discussed broadly, emphasizing its economic significance and sustainability challenges. Finally, the **Blue Flag Program** is assessed as an international certification for quality and environmental sustainability in coastal areas.

Finally, the **“Strategic Positioning”** chapter analyses the strengths, weaknesses, opportunities, and threats across dimensions such as infrastructure, sustainability, digital transformation, and human capital are assessed in a **SWOT Analysis**. This analysis is followed by an **Action Plan and CAME Analysis**, where key strategic actions are proposed to enhance sustainable tourism development, ensuring alignment with the **Sustainable Development Goals (SDGs)**.

In conclusion, the study highlights the opportunities and challenges facing coastal tourism in these regions. It emphasizes the need for sustainable development, improved infrastructure, the promotion of digital transformation and sustainable practices, and enhanced governance to support long-term growth. The proposed action plan offers concrete steps to maximize economic benefits while preserving the natural and cultural assets of these island destinations.

## 8 DESCRIPTION OF STUDY OBJECTIVES, SCOPE AND METHODOLOGY

### 8.1 OBJECTIVES

The present report specifically focuses on the execution of Task 3.1 (Analysis of available coastal and maritime tourism products and their development sites) of the overall project. The objectives of this deliverable (Task 3.1) are as follows:

- Conduct a **general characterization of the maritime-tourism** sector in the Outermost Regions (ORs) of the Azores, Madeira, the Canary Islands, and Martinique.
- **Characterize the companies** that make up the maritime-tourism sector in the mentioned ORs.
- **Analyse coastal and maritime tourism products** and development sites in the ORs.
- Identify **trends, challenges, and opportunities** for the sector in these regions.

The objective of this work is to **prepare a study that uses statistical information and direct consultations** with stakeholders to address the following topics:

- Characterization of the maritime-tourism sector and statistical data collection: A general characterization of the maritime-tourism sector will be conducted in the study area (Azores, Portugal; Madeira, Portugal; the Canary Islands, Spain; Martinique, France), addressing the following points:
  - Identification of tourism operators: Identify active tourism operators, their market presence, and the different types of services they offer.
  - Governance and legal framework: Characterize the regulatory and governance framework affecting the maritime-tourism sector in each region.
  - State of sector knowledge: Assess the level of knowledge about the maritime-tourism sector in each region.
  - Economic impact: Quantify the economic impact of the marine and coastal tourism sectors on the Gross Domestic Product ("GDP") of the different regions.
  - Current trends: Identify current trends in coastal and marine tourism in the Azores, Madeira, the Canary Islands, and Martinique.
  - Economic scale: Evaluate the economic scale of the maritime-tourism sector in these regions.
  - Sector fragmentation: Define the degree of fragmentation of the sector in each region.
  - Barriers to entry and exit for clients: Identify the main barriers affecting customer entry and exit in maritime-tourism activities.
  - Opportunities for client entry: Identify the main opportunities to attract customers to maritime-tourism activities.

- Infrastructure and accessibility: Evaluate the availability of infrastructure and accessibility that favour the sector's development.
- Human capital qualification: Determine the qualification levels of the available human capital and assess its availability for the sector.
- Training needs: Identify the training and skill development needs in the sector.
- Negotiation capacity: Assess the negotiation capacity within the sector and the opportunities it offers.

The study must **characterize the companies** operating in each region based on direct consultations and statistical data collection. The aspects to analyse include:

- Types of business activities: Identify the different activities offered by maritime-tourism companies in each region.
- Company size and teams: Analyse the size of the companies and characterize their team compositions.
- Innovation and technology level: Evaluate the level of innovation and technological advancement implemented by companies.
- Examples of innovation: Provide examples of successful innovative actions in the sector.
- Sustainability: Evaluate how sustainability concerns are integrated into the management and operation of companies.
- Employee qualification level: Analyse the level of training and qualifications of the personnel working in the sector.

**Characterization of the current and potential supply in the maritime-tourism sector:** A detailed description of the experiences and tourism products currently available in each region (Azores, Madeira, the Canary Islands, and Martinique) is required, addressing the following points:

- Duration of offers: Differentiate between short-duration activities (a few hours) and long-duration activities (several days).
- Pricing definition: Describe how prices are set and the factors influencing them.
- Target audience: Identify the target audience of the offers, in demographic, geographic, and psychographic terms.
- Accommodation: Specify the type of accommodation included if part of the offer.

- Marketing actions: Describe the marketing strategies used by tourism operators and the main channels they employ to attract customers.

## 8.2 METHODOLOGY

The study has been divided into two phases. The first phase focuses on analysis or diagnosis, where a comprehensive understanding of the data is established. The second phase involves strategic analysis, during which conclusions are presented based on the collected data. This phase includes conducting a SWOT analysis, creating an action plan through a CAME analysis, and developing a strategic map to outline key directions and priorities.

The working methodology for the first phase was based primarily on the search for data from official sources provided by various public organizations that offer statistic information related to the subject of the study and allow the study's objectives to be achieved.

These databases have been supplemented with field studies and extensive data searches using the internet and artificial intelligence, drawing from repositories of information from other organizations, institutions, or research centres conducting studies on the subject.

One limitation of the analysis is that not all these sources provide data with the same structure or scope. All data have been thoroughly verified, prioritizing those that enable a meaningful comparison between regions.

To ensure the study adequately addresses marine and coastal tourism, it has been deemed essential to dedicate specific sections to a macro-level socioeconomic characterization of each region and to describe the basic infrastructures necessary for the development of these activities. These include port and airport facilities, inter-island connectivity, and available hotel infrastructure. Such an approach allows for a comprehensive understanding of the foundational elements supporting tourism and ensures the strategic recommendations are rooted in the practical realities of each region. This focus aligns with the overarching goal of the study: to identify key strengths and opportunities while addressing existing weaknesses and threats, ultimately fostering sustainable and efficient tourism development.

## 8.3 DATA SELECTION AND COLLECTION

### 8.3.1 Data Sources

Two limitations regarding the use of databases can be highlighted:

1. The **diversity of sources**, which do not provide the same time series or organize data in the same way, often prevents comparisons between regions. Whenever possible, efforts have been made to use homogeneous data and databases to ensure more consistent comparisons.
2. The **fragmentation of the sector** makes it very difficult to survey or collect data from all stakeholders. To address this, representative samples have been taken by conducting large-scale internet searches for data on companies that rank well in search engines. This approach is based on the premise that these companies are also the most visible to tourists conducting similar searches.
3. **Data Update and Availability:** Many databases are not updated frequently enough, which may lead to the use of outdated information. Additionally, some data may not be publicly available or may require special access permissions, limiting the scope of the analysis.
4. **Bias in Available Information:** Information obtained from public sources or from companies with higher visibility in search engines may not be representative of the sector as a whole. Small businesses or informal actors may be excluded, leading to a biased analysis.
5. **Methodological Differences Between Sources:** Each data source may use different methodologies for data collection and processing, making it difficult to standardize the information and potentially introducing discrepancies in the results.
6. **Heterogeneity Across Regions:** Not all regions of the area of study have provided or possess the same data in a comparable format or units. This lack of uniformity complicates direct comparisons and may require additional processing or conversion efforts to harmonize the data.

To overcome such limitations Key data providers has been the following:

Table 1. Key Data Provider

Acronyms	Data Provider
<b>CMT</b>	Comité Martiniquais du Tourisme
<b>DREM</b>	Direção Regional de Estatística da Madeira
<b>ICT</b>	Instituto Canario de Turismo.
<b>INE- Portugal</b>	Instituto Nacional de Estadística (Portugal)
<b>INE- Spain</b>	Instituto Nacional de Estadística (España)
<b>INSEE</b>	Institut National de la Statistique et des Études Économiques

Acronyms	Data Provider
ISTAC	The Canary Islands Statistics Institute
OTA	Observatório do Turismo dos Açores
SREA	Serviço Regional de Estatística dos Açores

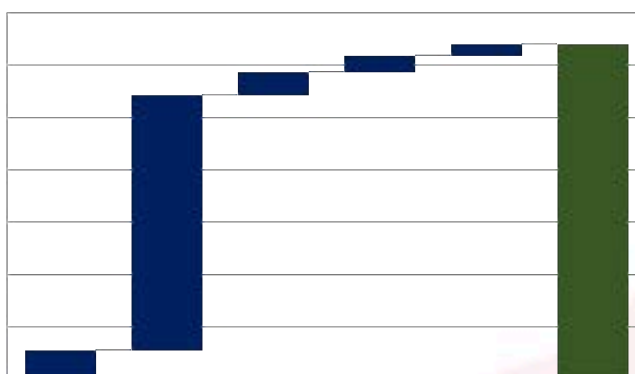
Source: Own elaboration

### 8.3.2 Field Campaigns (Surveys and Interviews)

#### 8.3.2.1 Shareholding

For the development of the project, the partners began by creating a shareholder map, which has reached a total of 640 organizations, companies, and entities. Of these, 487 correspond to the Canary Islands, 56 to the Azores, 44 to Madeira, 31 to Martinique, and the rest to national entities in Spain (5), France (2), Portugal (2), or European and international entities (13), which have been grouped in the following graph under the category "Others"<sup>2</sup>.

Figure 1. Origin of the shareholders



Source: Own elaboration based on project partners databases

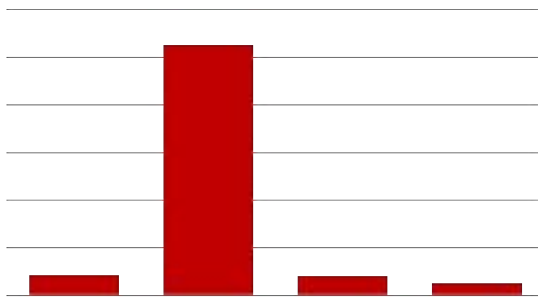
The first graph below illustrates the distribution of shareholders by group. It categorizes entities involved in this sector into four groups: Public Administration (44 shareholders), Industry/Business (546 shareholders), Research & Education (42 shareholders), and Civil Society/NGOs (26 shareholders). The data clearly show that the majority of shareholders belong to the Industry/Business sector, indicating a strong interest from private enterprises in driving marine tourism development.

The second graph ("**Public Administration**") is split into five subgroups: Policy Makers (12 shareholders), General Public Administration (with or without tourism department) (20 shareholders), Public Administration focused exclusively concerned by tourism (1 shareholder), Public Companies (1 shareholder), and Non-classified/Others (5 shareholders). While most of

<sup>2</sup> It is estimated that the sample of 640 is representative for statistical purposes and the objectives of the project; however, it is acknowledged that there is a certain imbalance in the number of companies per island.

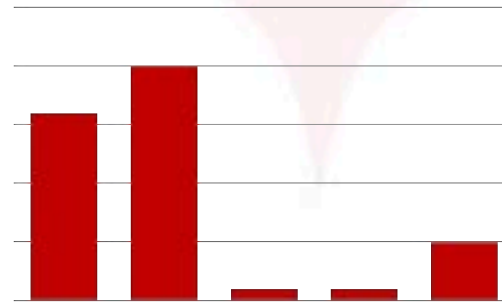
the shareholders belong to the Public Administration (22), policy makers hold a significant presence (16), suggesting an emphasis on regulatory and strategic decision-making.

Figure 2. Category of shareholders. Group



Source: Own elaboration based on project partners databases

Figure 3. Breakdown of Group 1 of shareholders.  
Public Administration



Source: Own elaboration based on project partners databases

For the analysis of the largest group (**Industry & Business**), it has been segmented into the following functional categories:

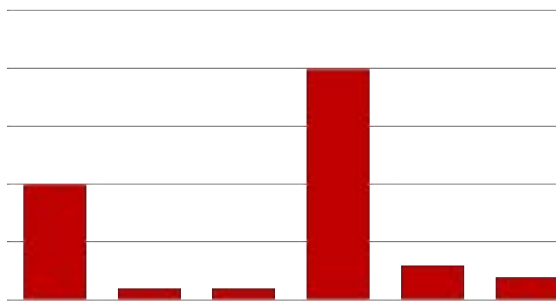
- Chamber of commerce.
- Business association/group/federation.
- Industry directly related with maritime tourism:
  - o Industry-1. Ports and marinas.
  - o Industry-2. Services for recreational and sports boats.
  - o Industry-3. Manufacture and sale of recreational and sports boats.
  - o Industry-4. Charter & Sea Excursions:
    - Industry- 4.1 Nautical charter.
    - Industry- 4.2 Maritime excursions.
    - Industry- 4.3 Whale watching.
  - o Industry- 5. Nautical training and qualifications.
  - o Industry- 6. Water sports.
  - o Industry- 7. Auxiliary services.
- Other related industries:
  - o Tourism (global).
  - o Maritime transport.

- o Astronomy.

**Research & Education** group is divided into six subcategories: Knowledge Centers (R&D) with 10 shareholders, Knowledge Centers (R&D)/Schools with 1 shareholder, Maintenance, Safety & Certification with 1 shareholder, Research & Academic Institutions with 20 shareholders, Schools with 3 shareholders, and Non-classified/Others with 3 shareholders. Most stakeholders in this category come from Research & Academic Institutions, indicating a strong presence of universities and research organizations in the field (including museums, astronomical observatories, etc.). Knowledge centers focused on research and development also have a notable presence, further emphasizing the role of innovation in this sector.

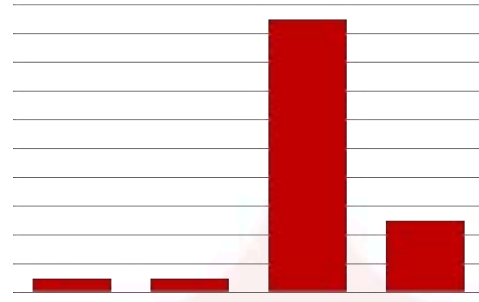
The last graph illustrates the composition of the **Civil Society & NGOs** group within the marine-related tourism sector. This group is divided into four subcategories: Associations (4 shareholders), Ocean Cleanup Initiatives (1 shareholder), Non-Profit Organizations (16 shareholders), and Non-classified/Others (5 shareholders). Most shareholders in this category belong to Non-Profit Organizations, highlighting the significant role of NGOs in advocating for marine conservation and sustainable tourism practices.

Figure 4. Breakdown of Group 3 of shareholders. Research and Education



Source: Own elaboration based on project partners databases

Figure 5. Breakdown of Group 4 of shareholders. Civil Society and NGOs



Source: Own elaboration based on project partners databases

### 8.3.2.2 Tourist Preferences

The chart below presents data on **tourist participation in various activities** in the Canary Islands during 2023, according to data collected from ISTAC<sup>3</sup>. Although it has not been found similar data available in other territories of the Region with the same structure and despite there are some differences in tourism pattern among them, presumably it can be considered as a worthy insight also for Madeira, Azores and Martinique.

<sup>3</sup> Data available at the date of the report on [https://www3.gobiernodecanarias.org/istac/statistical-visualizer/visualizer/data.html?resourceType=dataset&agencyId=ISTAC&resourceId=C00028A\\_000120&version=1.7#visualization/table](https://www3.gobiernodecanarias.org/istac/statistical-visualizer/visualizer/data.html?resourceType=dataset&agencyId=ISTAC&resourceId=C00028A_000120&version=1.7#visualization/table)

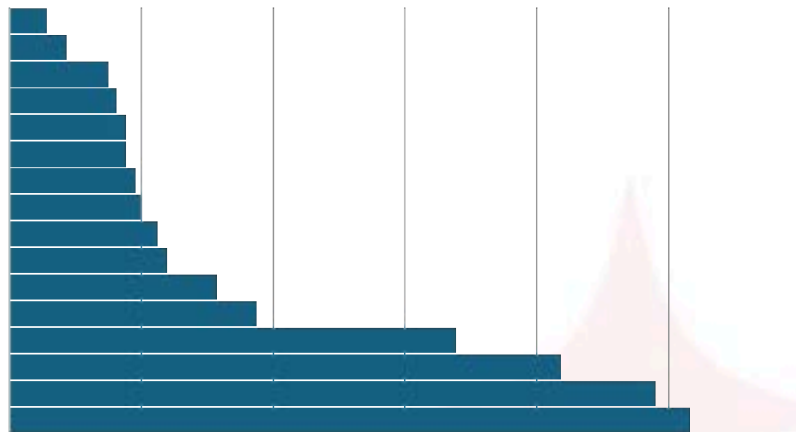


A total of 16 types of activities are included, which can be grouped into different categories: nature-related activities (hiking, sea activities, organized excursions, astronomical observation), cultural experiences (museums, markets, festivals, local gastronomy), leisure and entertainment options (theme parks, concerts, sports), and relaxation activities (beaches, hotel facilities, wellness treatments).

The most popular activities among tourists in the Canary Islands are those related to relaxation and independent exploration. The most in-demand activities include strolling and exploring on one's own (11,918,126 tourists), visiting the beach (9,782,820 tourists), and enjoying hotel and pool facilities (8,772,759 tourists). These figures reflect the tendency of tourists to take advantage of the islands' climate and landscapes for relaxation and independent travel.

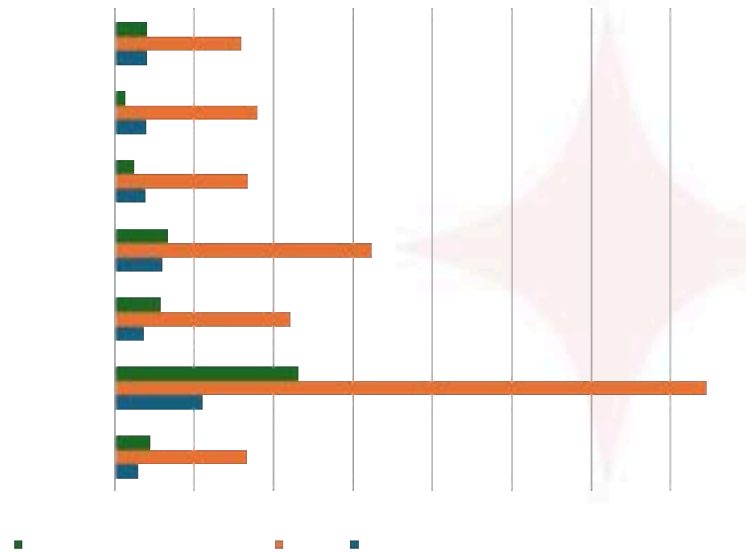
Regarding sea-related activities, there is a very significant interest in activities on the beach (9,8 million) ranking at position 2 in 2023 as tourist's preferences, followed by general activities at sea and maritime excursions and whale watching (both with 1,8 million). This reinforces Regions' reputation as a prime tourist destination for sea lovers and aquatic adventures.

Figure 6. Number of tourists participating in different activities in the Canary Island. Year 2023



Source: ISTAC<sup>3</sup>

Figure 7. Type of selected accommodation by activity (number of tourists)



Source: ISTAC<sup>4</sup>

The image shows a comparison between **the type of accommodation used by tourists and the activities they engage in**: maritime excursions and whale watching, beach activities, and other sea activities. It is observed that the highest proportion of tourists participating in these activities prefer to stay in 4-star hotels, with 42% for maritime excursions, 31.2% for the beach, and 33.0% for other sea activities, suggesting that these travelers have a medium-high income level. In contrast, tourists staying in 5-star have a more balance participation among these three categories. On the other hand, tourists staying in lower-category hotels (1, 2, and 3-sta) or tourist apartment or villas are relatively more active in maritime excursions. Finally, those choosing rented houses, house of family/friends, home exchange or private accommodations are more oriented to activities at sea.

<sup>4</sup> Data available at the date of the report on [https://www3.gobiernodecanarias.org/istac/statistical-visualizer/visualizer/data.html?resourceType=dataset&agencyId=ISTAC&resourceId=C00028A\\_000330&version=~latest#visualization/table](https://www3.gobiernodecanarias.org/istac/statistical-visualizer/visualizer/data.html?resourceType=dataset&agencyId=ISTAC&resourceId=C00028A_000330&version=~latest#visualization/table)

Figure 8. Type of selected accommodation by activity (percentage of each activity)



Source: ISTAC<sup>4</sup>

### 8.3.2.3 Market Organization. Services providers

One of the key characteristics of the market, as it has been observed, is that it is **highly fragmented** from the supply perspective. Except for activities requiring significant investment in infrastructure or equipment (such as nautical chartering) the **entry barriers in terms of capital or necessary human resources remain relatively low**.

Using as a reference the database of companies dedicated to active tourism in the Canary Islands, which includes a highly representative sample of 1,414 businesses categorized into 46 distinct activities, the following conclusions can be drawn:

- The Top-15 activities by number of businesses account for 82% of the total registered companies, while the Top-10 activities represent 71.5% of the market. This indicates a certain degree of concentration and identifies areas with sufficient demand to justify professional ventures in this sector.
- Among the Top-15 activities, hiking stands out as the most prevalent, with 295 companies or organizations offering this service in the Canary Islands, representing nearly 21% of the total sample. The second and third most common activities are diving and surfing, both closely linked to the maritime sector, with 153 and 152 companies, respectively, accounting for 10.8% and 10.7% of the total.
- Other highly maritime-related activities, such as kayaking, snorkeling or jet skiing are also represented within the Top-15 segment.
- In the following segment (ranking between 16 and 30), we would find canoeing, kitesurfing, paddle surf, or segway riding with 16, 13, 13 and 12 companies represented in the Canary Islands.

Figure 9. Number of Companies by Activity in the Canary Islands. Adventure Tourism (TOP 15)

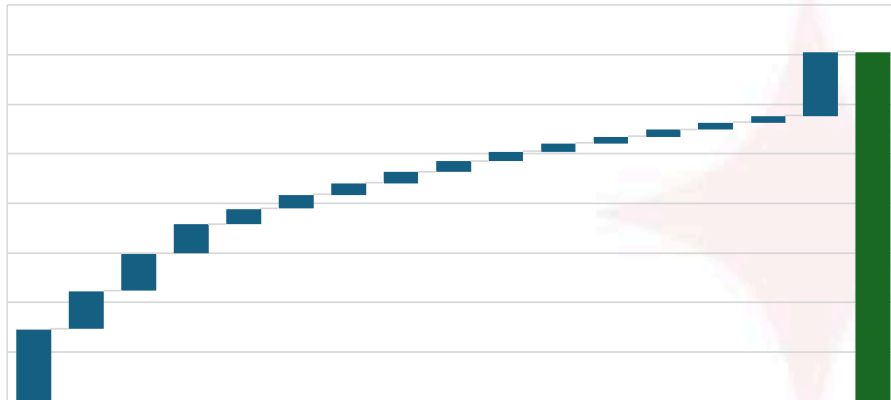
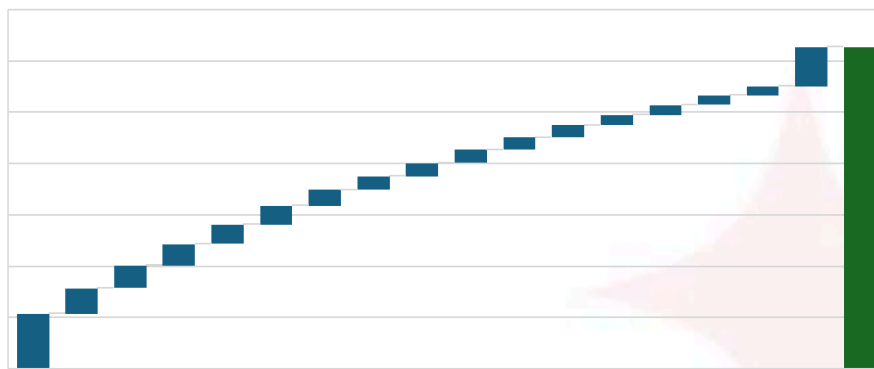
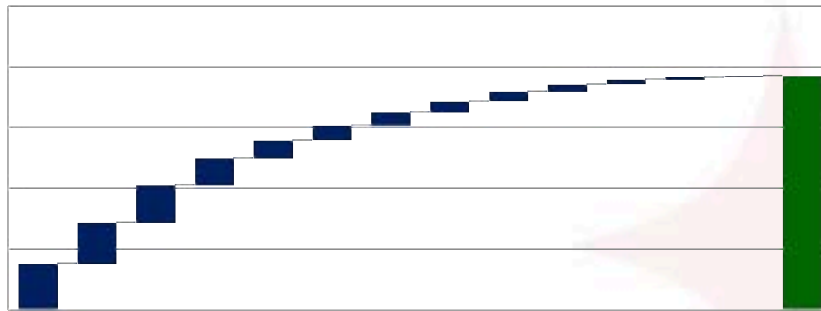


Figure 10. Number of Companies by Activity in the Canary Islands. Adventure Tourism (Ranked 15-30)



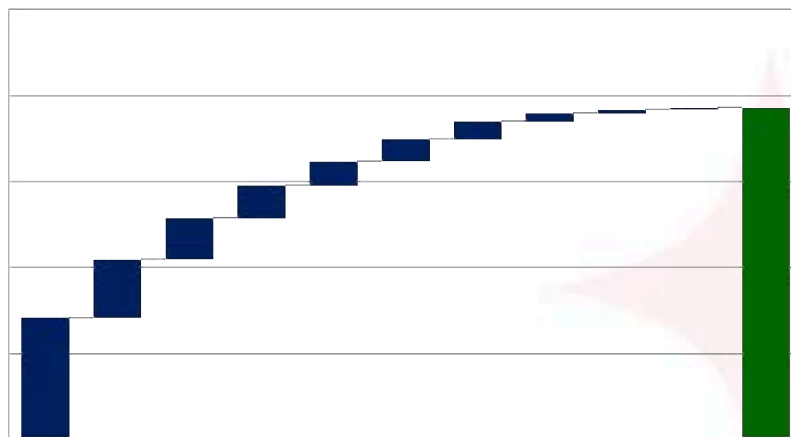
Likewise, there is a sample of 193 companies engaged in tourism activities related to the sea in the Azores archipelago. It is concluded that the highest business concentration, as the main activity offered by each company is in the chartering sector (38 companies, 20% of the total), followed by diving activities (34 companies, 18%), fishing (31 companies, 16%), maritime tourism trips (22 companies, 11%), and cetacean watching (15 companies, 8% of the total). These five activities account for 73% of the total companies.

Figure 11. Number of Companies by Main Activity in Azores. Maritime Tourism



These companies are geographically distributed across the islands of the archipelago, with the highest presence in São Miguel (76 companies, 37% of the total), Terceira (34 companies, 18% of the sample), and Faial (24 companies, 12% of the total). This distribution corresponds to the size and population of each of the islands that make up the Azores.

Figure 12. Number of Companies by Island in Azores. Maritime Tourism



It is worth noting that these companies do not offer a single service but rather diversify their portfolio to expand their offerings and reach a broader target audience. The following graph shows the number of services each company provides, establishing that the most common scenario is for companies to offer between two and four different services. The most common service is **maritime tourism trips with pre-established and organized programs**, followed by **chartering or boat rentals (with or without a crew)** and **recreational fishing**.

Figure 13. Number of different services provided by one company. Maritime Tourism in Azores

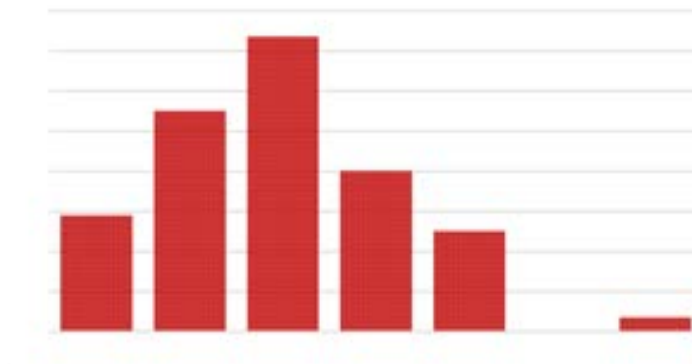
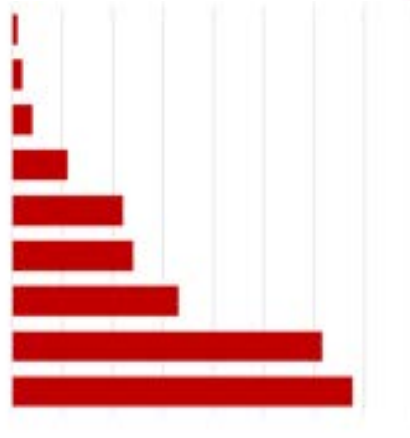


Figure 14. Number of times that a service is offered by different companies. Maritime Tourism in Azores



Finally, through the Azores business database, an interesting conclusion can be drawn about the development of this economic sector. When filtering companies by their year of establishment, a sharp exponential growth is observed, with a **significant surge in company creation after the COVID-19 pandemic**, as well as another strong growth following the 2008 financial crisis.

This may be a consequence of the global growth of outdoor and nature tourism, which includes activities related to the sea and the coast. Although it is not a new practice, outdoor activities regained great importance after COVID-19 due to many people's need to enjoy contact with nature and maintain a lifestyle that contributes to both physical and emotional health. This represents a great opportunity for the development of the sector in the islands.

Figure 15. Number of Companies by year of establishment in Azores. Maritime Tourism

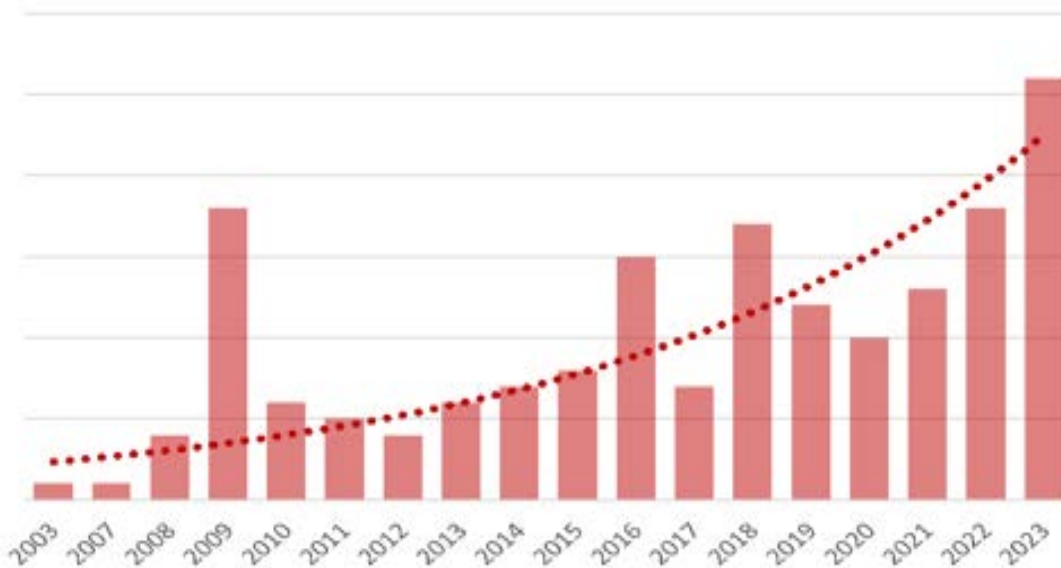


Table 2. Number of companies by type of activity in adventure tourism. The Canary Islands Sample

	Activity	Number of Companies	% (Partial)	% (Cumulative)
1	Hiking	295	20.9%	20.9%
2	Diving	153	10.8%	31.7%
3	Surfing	152	10.7%	42.4%
4	Bicycle touring	118	8.3%	50.8%
5	Kayaking	63	4.5%	55.2%
6	Canyoning	55	3.9%	59.1%
7	Paragliding	47	3.3%	62.4%
8	Stargazing	46	3.3%	65.7%
9	Climbing	43	3.0%	68.7%
10	Mountaineering	39	2.8%	71.5%
11	Trekking	32	2.3%	73.8%
12	Snorkeling	29	2.1%	75.8%
13	Jet skis	28	2.0%	77.8%
14	Rappelling	27	1.9%	79.7%
15	Quad biking routes	27	1.9%	81.6%
16	Orienteering	25	1.8%	83.4%
17	Horseback riding routes	22	1.6%	84.9%
18	Bird watching	21	1.5%	86.4%

	Activity	Number of Companies	% (Partial)	% (Cumulative)
19	Buggy routes	19	1.3%	87.8%
20	Survival	18	1.3%	89.0%
21	Canoeing	16	1.1%	90.2%
22	Kitesurfing	13	0.9%	91.1%
23	Paddle surf or sup (stand up paddleboarding)	13	0.9%	92.0%
24	Zip line	13	0.9%	92.9%
25	Bungee jumping	12	0.8%	93.8%
26	Segway riding	12	0.8%	94.6%
27	Spelunking (caving)	10	0.7%	95.3%
28	Via ferrata	10	0.7%	96.0%
29	Parascending	9	0.6%	96.7%
30	Shepherd's leap	9	0.6%	97.3%
31	Windsurfing	8	0.6%	97.9%
32	Paintball (paintball shooting)	4	0.3%	98.2%
33	Canoeing	3	0.2%	98.4%
34	Water skiing	3	0.2%	98.6%
35	Camel riding routes	3	0.2%	98.8%
36	Light sailing	3	0.2%	99.0%
37	Hang gliding	2	0.1%	99.2%
38	Flyboarding	2	0.1%	99.3%
39	Skydiving	2	0.1%	99.4%
40	Paramotoring	2	0.1%	99.6%
41	Towable tube riding	1	0.1%	99.6%
42	Pedal boats	1	0.1%	99.7%
43	Jet boating	1	0.1%	99.8%
44	Hanging bridges	1	0.1%	99.9%
45	Donkey riding routes	1	0.1%	99.9%





	<b>Activity</b>	<b>Number of Companies</b>	<b>% (Partial)</b>	<b>% (Cumulative)</b>
<b>4 6</b>	Slacklining	1	0.1%	100.0%
	<b>Total</b>	<b>1,414</b>	<b>100.0%</b>	<b>200.0%</b>

Table 3. Number of companies by type of activity in maritime tourism. Azores Sample

	<b>ACTIVITY</b>	<b>Number of Companies</b>	<b>% (Partial)</b>	<b>% (Cumulative)</b>
1	Boat Rentals / Chartering	38	19.7%	19.7%
2	Diving	34	17.6%	37.3%
3	Fishing	31	16.1%	53.4%
4	Maritime-tourism trips	22	11.4%	64.8%
5	Cetacean watching	15	7.8%	72.5%
6	SUP's Rentals	12	6.2%	78.8%
7	SUP's and Kayaks Rentals	11	5.7%	84.5%
8	Kayaks Rentals	9	4.7%	89.1%
9	Cetacean watching and Diving	8	4.1%	93.3%
10	Jet skis rentals	6	3.1%	96.4%
11	Big Game Fishing	4	2.1%	98.4%
12	Kayaks and Pedal Boats Rentals	2	1.0%	99.5%
13	Free dive	1	0.5%	100.0%
	Total	193	100.0%	100.0%

## 9 DIAGNOSIS OF CURRENT SITUATION

### 9.1 SITUATION ANALYSIS

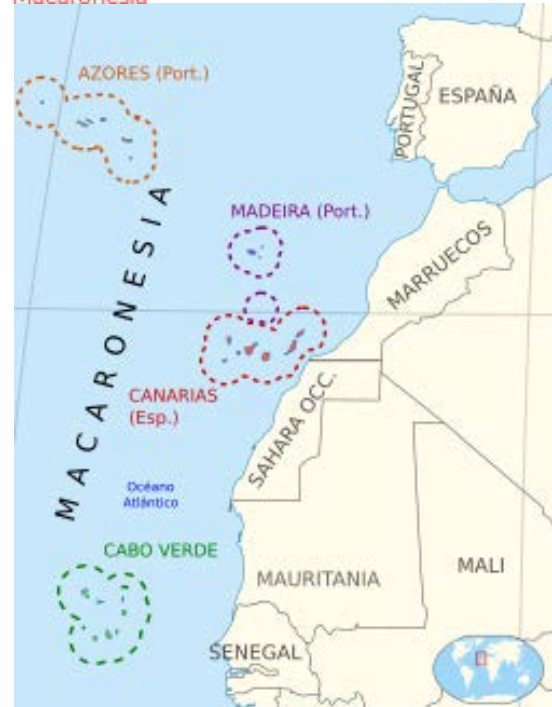
#### 9.1.1 Geographical and Territorial Characterization

##### 9.1.1.1 Overview

Macaronesia is a geographical region comprising several volcanic archipelagos located in the North Atlantic, off the coasts of Europe and Africa. The term "Macaronesia" comes from ancient Greek and means "fortunate islands" or "happy islands." It consists of four major archipelagos belonging to different countries:

1. **Azores (Portugal):** Located approximately 1,500 km west of the Iberian Peninsula, the Azores consist of nine islands spanning a total area of 2,346 square kilometres. Main islands: São Miguel, Terceira, Faial, Pico, São Jorge, Graciosa, Santa Maria, Flores, and Corvo.
2. **Madeira (Portugal):** This archipelago, located around 1,000 km southwest of mainland Portugal, includes the islands of Madeira and Porto Santo, along with smaller uninhabited islets. Madeira covers an area of 801 square kilometres, Main islands: Madeira and Porto Santo.
3. **The Canary Islands (Spain):** Situated off the northwest coast of Africa, the Canary Islands are a group of seven main islands and several smaller ones, covering a total area of approximately 7,447 square kilometres. Main islands: Tenerife, Gran Canaria, Lanzarote, Fuerteventura, La Palma, La Gomera, and El Hierro.
4. **Cape Verde (Republic of Cabo Verde):** An independent island nation located about 570 km west of the African mainland, Cape Verde consists of ten volcanic islands with a total land area of 4,033 square kilometres. **Main islands:** Santiago, Santo Antão, São Vicente, Fogo, Boa Vista, Sal, Maio, Brava, São Nicolau, and Santa Luzia (uninhabited).

Figure SEQ Figure \ARABIC 16. Situation of Macaronesia



The French Caribbean islands, officially designated as overseas departments and collectivities of France, are located in the eastern Caribbean region. These islands encompass different geographic territories and, although they share the same political status as integral parts of France, they also exhibit substantial differences. This report focuses on Martinique; however, other islands may be referenced when necessary, as several islands are often included in a broader Caribbean tourism package.

1. **Guadeloupe:** This archipelago covers an area of approximately 1,628 square kilometres. It consists of two main islands, Basse-Terre and Grande-Terre, separated by a narrow channel called Rivière Salée, as well as smaller islands like Marie-Galante, Les Saintes, and La Désirade.

Figure SEQ Figure \ ARABIC 17. Situation of French Caribbean Islands



2. **Martinique:** Located south of Guadeloupe, Martinique spans an area of 1,128 square kilometres. The island features volcanic mountains, with Mont Pelée, at 1,397 meters above sea level, being its highest point.

3. **Saint Martin (French side):** The French portion of this island shares its territory with Sint Maarten, part of the Kingdom of the Netherlands. The French side covers an area of approximately 53 square kilometres.

4. **Saint Barthélemy (St. Barts):** Covering only 24 square kilometres, Saint Barthélemy is one of the smallest islands in the region. Its landscape includes rolling hills and rugged coastlines surrounded by clear waters.

The scope of this report focusses on the ORs of: The Canary Islands, Azores, Madeira and Martinique (“**Area of the Study**” o “**the Region**”).

### 9.1.1.2 Key Features

The focus of this report is Azores and Madeira in Portugal, the Canary Islands in Spain and Martinique in France. Some of the key features of this region are the following:

- **Insularity:** The Area of Study is made up entirely of islands, which significantly influences the lifestyle, economy, and biodiversity of the region. This geographic isolation also contributes to unique ecosystems and challenges related to connectivity and resource management.
- **Outermost Regions (ORs):** Within the European Union, the Azores, Madeira, Martinique, and the Canary Islands are classified as Outermost Regions, a status that recognizes their geographic distance from mainland Europe. This designation provides them with special funding and policies to address their socio-economic challenges, including remoteness, small market size, and dependence on imports.
- **Economic characteristics:** The economies of the islands are highly dependent on tourism, driven by their natural beauty, warm climate, and unique ecosystems. Agriculture also plays a role, with products such as wine and tropical fruits being significant exports. However, their economic structures are vulnerable to external

shocks, particularly in the tourism sector, and rely heavily on imports to meet local demand.

- **Volcanic origin:** All the islands are of volcanic origin, shaping their landscapes and biodiversity.
- **Subtropical climate:** The region is characterized by warm and mild weather, supporting a rich diversity of flora and fauna.
- **Ecological richness:** The Region is home to many endemic species, including plants, birds, and reptiles.
- **Cultural heritage:** Each archipelago has a unique history and culture influenced by its colonizers and strategic location on maritime routes.

This Region is significant from environmental, cultural, and tourism perspectives, as well as for its strategic position in the Atlantic.

### **9.1.1.3 Geographical magnitudes**

The Canary Islands (Spain) cover an area of 7,447 km<sup>2</sup> and have a coastline length of 1,583 km. The archipelago consists of seven main islands: Tenerife, Gran Canaria, Lanzarote, Fuerteventura, La Palma, La Gomera, and El Hierro. Mount Teide, located on Tenerife, is the highest peak at 3,718 meters, making it not only the tallest mountain in Spain but also the highest point in the Macaronesia region.

The Azores (Portugal) span an area of 2,333 km<sup>2</sup> and have a coastline length of 667 km. The archipelago is composed of nine main islands: São Miguel, Terceira, Faial, Pico, São Jorge, Santa Maria, Graciosa, Flores, and Corvo. The highest elevation is Mount Pico, located on Pico Island, which rises to 2,351 meters and is the tallest mountain in Portugal.

The Madeira Archipelago (Portugal) covers a land area of 801 km<sup>2</sup> and has a coastline length of approximately 250 km. It includes the islands of Madeira and Porto Santo. The highest point is Pico Ruivo, which reaches an altitude of 1,862 meters.

In total, the Canary Islands, Azores, and Madeira together cover an area of approximately 10,581 km<sup>2</sup> and 2,500 Km<sup>5</sup> of coastline boasting a diverse range of landscapes, shaped by their volcanic origins and locations in the Atlantic Ocean. These territories are significant not only for their natural beauty but also for their strategic and ecological importance (Table 4).

Martinique accounting for 1,128 km<sup>2</sup>, representing approximately 39.8% of the French Caribbean islands (total area of 2,833 km<sup>2</sup>). Mont Pelée in Martinique is the highest peak in the French Caribbean, standing at 1,397 meters, and is one of the most notable volcanic features in the Lesser Antilles (Table 6).

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<sup>5</sup> Shoreline length data may vary depending on the sources consulted and the measurement methodologies used.

Table 4. Main geographical features of Macaronesia

Territory	Area (km <sup>2</sup> )	Coastline (km)	Main Islands	Highest Altitude
<b>The Canary Islands</b>	7,447	1,583	Tenerife, Gran Canaria, Lanzarote, Fuerteventura, La Palma, La Gomera, El Hierro	Mount Teide (3,718 m)
<b>Azores</b>	2,333	667	São Miguel, Terceira, Faial, Pico, São Jorge, Santa Maria, Graciosa, Flores, Corvo	Mount Pico (2,351 m)
<b>Madeira</b>	801	250	Madeira, Porto Santo	Pico Ruivo (1,862 m)
<b>Total Macaronesia</b>	<b>10,581</b>	<b>2,500</b>	<b>All above</b>	<b>Mount Teide (3,718 m)</b>
<b>Martinique</b>	1,128	350	Martinique	Mont Pelée (1,397 m)
Total French Caribbean Islands	2,833	720	Martinique, Guadeloupe, Saint Martin (French side), and Saint Barthélemy	Mont Pelée (1,397 m)

Source: Own elaboration with Eurostat data

The breakdown by each of the islands is as follows (Table 5).

Table 5. Breakdown of main geographical features by island in the Macaronesia

Territory	Island	Area (km <sup>2</sup> )	Coastline Length (km)
<b>The Canary Islands</b>	Tenerife	2,034	342
	Fuerteventura	1,659	326
	Gran Canaria	1,560	236
	Lanzarote	845	213
	La Palma	708	155
	La Gomera	369	102
	El Hierro	268	107
<b>Azores</b>	São Miguel	746	155
	Pico	447	151
	Terceira	403	90
	São Jorge	246	95
	Faial	173	80
	Flores	143	72
	Santa Maria	97	77
	Graciosa	61	40
<b>Madeira</b>	Madeira	741	150
	Porto Santo	42	9
<b>Total</b>		<b>10,581</b>	<b>2,500</b>

Source: Own elaboration with Eurostat data

Table 6. Breakdown of main geographical features by island in the French Caribbean Islands

Archipelago	Island	Area (km <sup>2</sup> )	Coastline Length (km)
<b>Guadeloupe</b>	Basse-Terre	848	200
	Grande-Terre	590	300
	Other Marie-Galante, Les Saintes, La Désirade)	190	160
<b>San Martin (French side)</b>	San Martin (French side)	53	58
<b>San Bartolomé</b>	<b>San Bartolomé</b>	24	32
<b>Martinique</b>	Martinique	1,128	350
<b>Total</b>		2,833	

Source: Own elaboration with Eurostat data

## 9.1.2 Macroeconomic characterisation

### 9.1.2.1 GDP and GPD per capita

Based on the latest available data from 2023 available in Eurostat, INE-Spain and INE-Portugal, the combined GDP of the Canary Islands, Azores and Madeira amounts to approximately **76.7 billion euros**, representing a small fraction of the European Union's total GDP.

The European Union's GDP in 2022 was approximately **17.2 trillion euros**. This means that the Macaronesian regions collectively contribute about **0.45%** of the EU's total economic output.

The Canary Islands reported a GDP of 54.19 billion euros in 2023, accounting for 3.6% of Spain's total GDP, which stood at 1.50 trillion euros that year. The Canary Islands' GDP per capita was 27,100 euros (PPS per inhabitant<sup>6</sup>), reflecting a robust economic output primarily driven by tourism, agriculture, and services. GDP per capita without PPS adjustment was 22,303€.

Azores had a GDP of 5.38 billion euros as of 2023, contributing approximately 2.01% to Portugal's total GDP, which was 267.4 billion euros in the same year. The GDP per capita (PPS per inhabitant) in the Azores was 27,100 euros, indicating a modest economic contribution relative to the rest of Portugal, largely supported by agriculture, fisheries, and tourism. GDP per capita without PPS adjustment was 15,700 €.

<sup>6</sup> "PPS per inhabitant" in the Eurostat description means "Purchasing Power Standard (PPS) per inhabitant". It is a measure used to compare **Gross Domestic Product (GDP) per capita** across different regions and countries in the European Union (EU) by adjusting for differences in price levels. Thus, PPS is a standardized unit used by Eurostat to eliminate differences in price levels between countries and regions, allowing for a more accurate comparison of real purchasing power



Madeira's GDP reached 6.66 billion euros in 2023, making up around 2.61% of Portugal's GDP. The GDP per capita in Madeira was 33,300 euros (PPS per inhabitant), substantially higher than the Azores and the Canary Islands and Portugal national average of 25,280 euros per capita. GDP per capita without PPS adjustment was 17,900 €. The region's economy relies also on tourism, wine production, and services.

The GDP of Martinique reached approximately €10,14 billion as of 2023, representing about 0.36% of France's total GDP. The GDP per capita in Martinique was 26,200 € (PPS per inhabitant) in that year. GDP per capita without PPS adjustment was 27,179 €. The economy relies mainly on public and private services.

In summary, the Region, while relatively small in economic terms compared to their parent countries and the EU, play a vital role in tourism and specific industries that are crucial to their local economies.

The GDP per capita varies significantly between the regions, their respective countries, and the European Union as a whole. In 2023, the average GDP in Europe was 38,130 € per capita making it significantly higher than that of the Macaronesian and Martinique regions.

Among these territories, Madeira had the highest GDP per capita at 33,300 euros in 2023, followed by Azores and the Canary Islands both with 27,100 while Martinique stood the lowest at 26,200. While these figures reflect relatively strong economic output for these regions, they remain below their respective national averages in Spain and France but not in Portugal.

When compared to the EU average, the GDP per capita in all three regions remains significantly lower, highlighting their economic challenges and dependency on key industries such as tourism and agriculture. Despite this, the Canary Islands perform relatively better within this context, closing the gap to some extent with both their national and EU counterparts.

Table 7. GDP and GDP per capita in Macaronesian regions as of 2023

Region	GDP (million €)	GDP per capita (€) (PPS per habitant)	GDP per capita (€)	% of National GDP	% of EU GDP
The Canary Islands	54,194	27,100	22,303	3.62%	0.32%
Azores	5,376	27,100	15,700	2.01%	0.03%
Madeira	6,989	33,300	17,900	2.61%	0.04%
Martinique	10,138	26,200	27,179	0.36%	0.06%
Spain	1,498,324	30,970	28,276	100%	8.71%
Portugal	267,384	25,280	19,250	100%	1.56%
France	2,822,455	41,330	41,330	100%	16.42%
EU	17,193,780	38,130	32,140	100%	100%

Source: Eurostat ([https://ec.europa.eu/eurostat/databrowser/explore/all/all\\_themes](https://ec.europa.eu/eurostat/databrowser/explore/all/all_themes))



### 9.1.2.2 Distribution by productive sectors

In the Canary Islands, the services sector dominates, accounting for approximately 86% of the regional GDP, with tourism being the primary driver of economic activity. The construction sector contributes around 7%, fuelled by investments in tourism-related and residential infrastructure. The industrial sector represents 5% of GDP, focusing on food and beverage production, while agriculture, livestock, and fishing account for approximately 2%, with key products including bananas and tomatoes.

In the Azores, the services sector makes up about 60% of GDP, driven by tourism and public services. Agriculture, livestock, and fishing contribute nearly 20%, with dairy production being a significant economic activity. The industrial sector adds around 15% to the GDP, particularly through the processing of agricultural and fishery products. Construction represents 5%, mainly focused on local infrastructure projects.

The Madeira region also has a services-dominated economy, which accounts for approximately 80% of its GDP, with tourism and financial services being the main contributors. The industrial sector contributes about 10%, with notable activities including the production of Madeira wine and handicrafts. Construction represents around 7%, largely linked to tourism and residential developments. Agriculture, livestock, and fishing make up roughly 3%, with bananas and flowers being key products.

Martinique's economy is primarily service-based accounting 83% of the GDP, with agriculture contributing around 6% and industry about 11% to its GDP. Despite having the highest GDP per capita among France's overseas regions, it remains below the national average.

Overall, these figures highlight the importance of the services sector, particularly tourism, in the economies of the Macaronesian regions, complemented by contributions from agriculture, industry, and construction.

Table 8. GDP per sector

Region	Services (% GDP)	Industry (% GDP)	Agriculture, Livestock, Fishing (% GDP)	Construction (% GDP)
The Canary Islands	86%	5%	2%	7%
Azores	60%	15%	20%	5%
Madeira	80%	10%	3%	7%
Martinique	83%	11%	6%	N/A

Source: Own elaboration with Eurostat data

As it is observed above the services sector is the dominant economic driver across all the Region. In the Canary Islands, it has the highest share, accounting for 86% of the regional GDP, largely due to the importance of tourism. Martinique and Madeira follow closely with 83% and 80%, also driven by tourism and financial services. The Azores, while still relying heavily on services, have the lowest share among the regions at 60%, reflecting the relatively higher importance of agriculture and industry in their economy.

The industrial sector has the most significant role in the Azores, where it accounts for 15% of GDP, driven by the processing of agricultural and fishery products. In Martinique accounts 11% while in Madeira, industry represents 10%, with activities like wine production and handicrafts. The Canary Islands have the smallest industrial contribution, at 5%, focusing on food and beverage production.

Agriculture, Livestock, and Fishing holds the highest importance in the Azores, contributing 20% to GDP, thanks to the region's strong dairy production and fishing industries. In Martinique represents 6% and in Madeira, agriculture contributes 3%, with bananas and flowers being key products. The Canary Islands have the smallest share, at just 2%, reflecting the region's focus on services and its reliance on imported agricultural products.

Construction contributes differently to each region's economy. In the Canary Islands, it accounts for 7% of GDP, reflecting infrastructure development tied to tourism and residential projects. Madeira has a similar share at 7%, also connected to tourism-related developments. The Azores, however, have the lowest contribution in the Macaronesia at 5%, as local infrastructure projects are less extensive compared to the other regions. There is no data available in Martinique.

Across all sectors, the Canary Islands and Martinique show the strongest reliance on services, while the Azores maintain a more balanced economy with significant contributions from agriculture and industry. Madeira strikes a middle ground, with a dominant services sector but a notable presence of industry.

### **9.1.2.3 Population**

As of January 1, 2023, the European Union's population was approximately 448.8 million people.

The combined population of the Macaronesian regions totalled 2,888,388, representing about 0.64% of the EU's total population.

Focusing on individual countries, Spain's population stood at 48,085,361. The Canary Islands, with a population of 2,282,632, accounted for approximately 4.75% of Spain's total population.

In Portugal, the population was estimated at 10,430,738 in 2023. The Azores, with 295,025 residents, made up about 2.83% of Portugal's population, while Madeira's 256,731 inhabitants constituted approximately 2.46%.

As mentioned above, Macaronesia, has a total population of 2,888,388 people as of 2023. The gender distribution is approximately 49.2% men and 50.8% women.

- The Canary Islands: 2,282,632 people (79.0% of Macaronesian population).
- Azores: 295,025 people (10.2% of Macaronesian population).
- Madeira: 256,731 people (8.9% of Macaronesian population).

The Canary Islands have a total population of 2,282,632, representing 79.0% of the total Macaronesian population. The gender distribution is 49.6% men and 50.4% women.

- Tenerife is the most populous island, with 1,017,531 inhabitants, making up 44.6% of the region's population.
- Gran Canaria follows with 870,595 people (38.1%).
- Lanzarote has 156,189 residents (6.8%).
- Fuerteventura hosts 122,629 inhabitants (5.4%).
- La Palma has a population of 81,863 (3.6%).
- La Gomera has 21,678 residents (0.9%).
- El Hierro is the least populous, with 11,147 inhabitants (0.5%).

The Azores have a total population of 295,025, accounting for 10.2% of the total Macaronesian population. The gender split is 49.0% men and 51.0% women.

- São Miguel is the most populous island, with 137,856 inhabitants (46.7% of the region's population).
- Terceira comes next, with 56,437 people (19.1%).
- Faial has 14,994 residents (5.1%).
- Pico has a population of 13,645 (4.6%).
- São Jorge hosts 8,373 people (2.8%).
- Santa Maria has 5,552 residents (1.9%).
- Graciosa has a population of 4,091 (1.4%).
- Flores has 3,673 inhabitants (1.2%).
- Corvo is the smallest, with only 384 residents (0.1%).

Madeira has a total population of 256,731, comprising 8.9% of the total Macaronesian population. The gender split is 48.7% men and 51.3% women.

- Madeira Island is the most populous, with 251,060 residents, accounting for 97.8% of the region's population.
- Porto Santo has 5,483 inhabitants (2.2%).

Table 9. Breakdown of population in Macaronesia. Overview as of 2023

Region	Island	Population	% of Region	% of Macaronesia
The Canary Islands	Tenerife	1,017,531	45%	36,6%
	Gran Canaria	870,595	38%	31,3%
	Lanzarote	156,189	7%	5,6%
	Fuerteventura	122,629	5%	4,4%

Region	Island	Population	% of Region	% of Macaronesia
	La Palma	81,863	4%	.0
	La Gomera	21,678	1%	0.8%
	El Hierro	11,147	0%	0.4%
	<b>Total</b>	<b>2,281,632</b>	<b>100%</b>	<b>82.0%</b>
Azores	São Miguel	137,856	56%	5.0%
	Terceira	56,437	23%	2.0%
	Faial	14,994	6%	0.5%
	Pico	13,645	6%	0.5%
	São Jorge	8,373	3%	0.3%
	Santa Maria	5,552	2%	0.2%
	Graciosa	4,091	2%	0.1%
	Flores	3,673	1%	0.1%
	Corvo	384	0%	0.0%
	<b>Total</b>	<b>245,005</b>	<b>100%</b>	<b>8.8%</b>
Madeira	Madeira	251,060	98%	9.0%
	Porto Santo	5,483	2%	0.2%
	<b>Total</b>	<b>256,543</b>	<b>100%</b>	<b>9.2%</b>
<b>Gran Total</b>		<b>2,783,180</b>	<b>100%</b>	<b>100%</b>

Source: Instituto Nacional de Estadística (INE-Spain), Spain / Instituto Nacional de Estadística (INE-Portugal), Portugal / Institut National de la Statistique et des Études Économiques (INSEE)

Here's the table with the population of the main French Caribbean islands, including the percentage each island represents within its region and in comparison, to the total French Caribbean population.

Table 10. Breakdown of population in French Caribbean Islands. Overview as of 2023

Region	Island	Population	% of Region	% of French Caribbean
Martinique	Martinique	364,508	100%	45.1%
Guadeloupe	Basse-Terre	186,661	47.2%	23.1%
	Grande-Terre	197,000	49.8%	24.4%
	Marie-Galante	10,655	2.7%	1.3%
	La Désirade	1,595	0.4%	0.2%
	Les Saintes (Terre-de-Haut and Terre-de-Bas)	2,882	0.7%	0.4%
	<b>Total Guadeloupe</b>		<b>398,793</b>	<b>100%</b>

Region	Island	Population	% of Region	% of French Caribbean
Saint Martin	French side of Saint Martin	35,334	100%	4.4%
Saint Barthélemy	Saint Barthélemy	9,961	100%	1.2%
<b>Total French Caribbean</b>		<b>808,596</b>	<b>100%</b>	<b>100%</b>

Source: National Institute of Statistics and Economic Studies of France (INSEE).

These figures provide an overview of the population distribution in the French Caribbean islands, highlighting the demographic prominence of Martinique and Guadeloupe within the region.

The gender distribution in each of the islands is shown below showing remarkably similar percentages with 49.2% men and 50.8% in the Canary Islands, 49.0% men and 51.0% women in the Azores and 48.7% men and 51.3% women.

Table 11. Breakdown of gender in the Canary Islands as of 2023

Island	Total Population	% Men	% Women
Tenerife	1,017,531	49.2%	50.8%
Gran Canaria	870,595	48.9%	51.1%
Lanzarote	156,189	50.1%	49.9%
Fuerteventura	122,629	51.0%	49.0%
La Palma	81,863	49.5%	50.5%
La Gomera	21,678	49.3%	50.7%
El Hierro	11,147	50.0%	50.0%
<b>Total</b>	<b>2,281,632</b>	<b>49.2%</b>	<b>50.8%</b>

Source: Instituto Nacional de Estadística (INE-Spain), Spain.

Table 12. Breakdown of gender in Azores as of 2023

Island	Total Population	% Men	% Women
São Miguel	137,856	48.7%	51.3%
Terceira	56,437	49.0%	51.0%
Faial	14,994	48.5%	51.5%
Pico	13,645	49.2%	50.8%
São Jorge	8,373	48.9%	51.1%
Santa Maria	5,552	49.1%	50.9%
Graciosa	4,091	48.8%	51.2%
Flores	3,673	49.3%	50.7%
Corvo	384	50.5%	49.5%
<b>Total</b>	<b>245,005</b>	<b>49.0%</b>	<b>51.0%</b>

Source: Instituto Nacional de Estatística (INE-Portugal), Portugal.

Table 13. Breakdown of gender in Madeira as of 2023

Island	Total Population	% Men	% Women
Madeira	251,060	48.6%	51.4%
Porto Santo	5,483	49.0%	51.0%
<b>Total</b>	<b>256,543</b>	<b>48.7%</b>	<b>51.3%</b>

Source: Instituto Nacional de Estatística (INE-Portugal), Portugal.

The table below presents the gender distribution across the main French Caribbean islands, including Martinique, Guadeloupe (and its dependent islands), Saint Martin (French side), and Saint Barthélemy. The data highlights slight variations in the proportion of men and women on each island being 48% of man and 52% of women as the ratios accounted in Macaronesia.

Table 14. Breakdown of gender in French Caribbean as of 2023

Island	Total Population	% Men	% Women
Martinique	364,508	47.0%	53.0%
Basse-Terre (Guadeloupe)	186,661	48.0%	52.0%
Grande-Terre (Guadeloupe)	197,000	48.0%	52.0%
Marie-Galante (Guadeloupe)	10,655	48.0%	52.0%
La Désirade (Guadeloupe)	1,595	48.0%	52.0%
Les Saintes (Guadeloupe)	2,882	48.0%	52.0%
French Saint Martin	35,334	49.0%	51.0%
Saint Barthélemy	9,961	49.0%	51.0%
<b>Total Average</b>	<b>808,596</b>	<b>47.7%</b>	<b>52.3%</b>

Source: National Institute of Statistics and Economic Studies of France (INSEE).

#### 9.1.2.4 Labour market based on data published by European, national and regional statistical agencies)

The labour force participation rate in the Canary Islands stood at 58% in 2023, slightly below the national average of 59%. This reflects a moderate level of workforce engagement in the region compared to the rest of Spain.

The employment distribution in the Canary Islands is heavily concentrated in the services sector, which accounts for approximately 80% of all jobs, driven primarily by the tourism industry. The construction sector employs 8% of the workforce, focusing on tourism-related and residential infrastructure. The industrial sector represents 7%, with activities centred on food and beverage production, while agriculture, livestock, and fishing account for 5%, mainly producing bananas and tomatoes.

The unemployment rate in the Canary Islands was 16.2% in 2023, higher than Spain's national average of 14%. Unemployment rates also vary significantly across demographics: 14.3% for men, 18.3% for women, and a particularly high 34.5% for young people under 25.

The labour force participation rate in the Azores was 55% in 2023, below Portugal's national average of 60%. This highlights a relatively smaller proportion of the population actively engaged in the workforce.

Employment in the Azores is more evenly distributed than in other regions. The services sector employs 60% of the workforce, focusing on tourism and public services. Agriculture, livestock, and fishing play a significant role, accounting for 25% of jobs, driven by dairy production. The industrial sector provides 10% of jobs, with a focus on processing agricultural and fishery products, while construction represents 5%, centred on local infrastructure projects.

The unemployment rate in the Azores was 8% in 2023, aligning with the national average. Unemployment rates by demographic show 7% for men, 9% for women, and 20% for young people under 25.

Madeira's labour force participation rate was 57% in 2023, slightly below the national average of 60%, reflecting a moderate engagement of the working-age population.

Employment in Madeira is dominated by the services sector, which employs 75% of the workforce, with a strong reliance on tourism and financial services. The industrial sector accounts for 12%, focusing on activities like wine production and crafts. Construction employs 8% of workers, mainly supporting tourism and residential developments, while agriculture, livestock, and fishing contribute 5%, with key products like bananas and flowers.

The unemployment rate in Madeira was 9% in 2023, like Portugal's national average. Gender-based unemployment rates were 8% for men and 10% for women, while unemployment among young people under 25 stood at 22%.

In summary, the labour market dynamics in the three Macaronesian regions reveal both similarities and notable differences.

In terms of labour force participation, the Canary Islands have the highest rate at 58%, followed by Madeira at 57%, and the Azores at 55%, all slightly below their respective national averages. The dominance of the services sector is a common feature across all three regions, with the Canary Islands leading at 80% of employment due to the heavy reliance on tourism, compared to 75% in Madeira and 60% in the Azores, where agriculture and fishing play a more significant role. The Azores have the highest share of employment in agriculture, livestock, and fishing at 25%, compared to just 5% in both the Canary Islands and Madeira. Meanwhile, the industrial sector is most prominent in the Azores at 10%, followed by Madeira at 12% and the Canary Islands at 7%.

Unemployment rates show stark contrasts: the Canary Islands face the highest overall unemployment rate at 16.2%, including a staggering 34.5% for youth under 25, significantly higher than Madeira's 22% and the Azores' 20%. Gender disparities are most pronounced in the Canary Islands, where unemployment among women reaches 18.3% compared to 14.3% for men, while Madeira and the Azores show smaller gaps between male and female unemployment rates. Overall, while all three regions heavily rely on services, the Azores exhibit a more balanced sectoral distribution, while the Canary Islands and Madeira are more dependent on tourism-driven employment.



According to data from INSEE (2022), the labour force participation rate in Martinique stood at 57% for individuals aged 15 to 64, slightly below the national average of 68% in mainland France. This reflects a moderate level of workforce engagement compared to the rest of the country.

Employment distribution in Martinique is concentrated in the tertiary sector, which accounts for approximately 80% of jobs, driven primarily by tourism, retail, and public administration. The industrial sector employs around 12% of the workforce, focusing on construction and light manufacturing, while the agricultural sector contributes about 4%, primarily through banana and sugarcane production.

The unemployment rate in Martinique was 12% in 2022, higher than France's national average of 7.3%. Unemployment rates vary significantly across demographic groups, with higher rates observed among young people and women.

In summary:

- The Canary Islands lead with a **labour force participation** rate of 58% (2023), followed by Martinique and Madeira, both at 57%. The Azores lag slightly behind at 55%. All four regions fall below their respective national averages, with Martinique showing the most significant gap compared to France's 68%, highlighting lower workforce engagement in the French overseas region.
- In terms of **employment distribution**, the services sector dominates across all regions. The Canary Islands and Martinique lead with 80% of jobs concentrated in services, driven primarily by tourism, public administration, and retail. Madeira follows at 75%, while the Azores demonstrate a more balanced economy, with only 60% of jobs in services. Agriculture, livestock, and fishing play a significant role in the Azores, accounting for 25% of employment, reflecting the importance of dairy production and fishing. In contrast, Martinique, Madeira, and the Canary Islands allocate just 4-5% of their workforce to these sectors. The industrial sector is most prominent in Madeira and Martinique, each contributing 12% of employment, followed by the Azores at 10%. The Canary Islands, with only 7% of industrial jobs, are the least industrialized among the regions.
- **Unemployment rates** vary significantly across these regions. The Canary Islands face the highest unemployment rate at 16.2% (2023), with youth unemployment reaching an alarming 34.5%. Gender disparities are also stark, with 18.3% for women compared to 14.3% for men. In Martinique, unemployment stands at 12% (2022), which is higher than France's national average of 7.3%, with particularly high rates among youth and women. Madeira recorded an unemployment rate of 9% in 2023, matching Portugal's national average, while youth unemployment was 22%. The Azores had the lowest unemployment rate at 8%, also matching Portugal's average, though youth unemployment remained high at 20%.



### 9.1.3 Regulatory, administrative and governance framework

The **Canary Islands** are an Autonomous Community of Spain, established under the Spanish Constitution of 1978. The region has its own Statute of Autonomy, which defines its political and administrative framework. The government is composed of:

- Parliament of the Canary Islands: A legislative body responsible for enacting regional laws and approving the budget.
- President of the Canary Islands: The head of the regional government, elected by the Parliament.
- Executive Council: The governing body that implements regional policies, including education, health, and infrastructure.

The Canary Islands are divided into two provinces—Santa Cruz de Tenerife and Las Palmas—with capitals shared between Santa Cruz de Tenerife and Las Palmas de Gran Canaria. Additionally, the islands enjoy a Special Economic Zone (ZEC) to attract investment and promote economic development.

The **Azores** are an Autonomous Region of Portugal, recognized under the Portuguese Constitution. The region has its own Statute of Autonomy, which grants it significant self-governance. Its institutions include:

- Regional Legislative Assembly: A unicameral legislature that drafts laws specific to the region.
- President of the Regional Government: The head of the executive branch, elected by the Legislative Assembly.
- Regional Government: Responsible for implementing policies in areas such as education, health, and agriculture.

The Azores are divided into 19 municipalities spread across its nine islands. The region also has its own Representative of the Republic, appointed by the President of Portugal, to oversee compliance with the Constitution and national laws.

**Madeira** is also an Autonomous Region of Portugal, with a governance structure similar to the Azores. It operates under its own Statute of Autonomy, which defines its political and administrative competencies. Key institutions include:

- Regional Legislative Assembly: Responsible for drafting regional laws and approving budgets.

- President of the Regional Government: The leader of the executive branch, elected by the Legislative Assembly.
- Regional Government: Manages areas such as tourism, education, and health.

Madeira is composed of 11 municipalities and includes the islands of Madeira and Porto Santo. Like the Azores, it has a Representative of the Republic to ensure alignment with national laws.

The **French Caribbean territories** are part of France, each with a specific administrative status that provides varying degrees of autonomy within the French Republic. The administrative framework of Martinique is as follows:

- Martinique is governed by the Territorial Collectivity of Martinique<sup>7</sup>, which consists of an Executive Council and an Assembly responsible for developing local policies in social affairs, education, economic development, transport, and environmental issues.
- The Prefet (Le Prefét): Appointed by the French Government. He represents the state and ensure the implementation of national policy, notably sovereign power (policy, security...)

French Caribbean territories benefit from specific economic measures, such as tax exemptions and incentives, to promote investment and sustainable development while maintaining their close ties with mainland France.

Thus all these regions have some common features:

- Autonomy: All three regions have legislative and executive powers to manage their internal affairs, especially in areas like health or education and some of them economic development.
- Special Status in the EU: The Canary Islands, Azores, Madeira and Martinique are classified as Outermost Regions (ORs) of the European Union, granting them special policies and funding to address challenges related to their geographic isolation and economic constraints.
- Local Governance: Each region has its own municipalities, which manage local services and infrastructure.

While the Canary Islands operate within Spain's decentralized autonomous community system, the Azores and Madeira enjoy substantial self-governance under Portugal's regional autonomy framework. Despite differences, all three regions maintain strong administrative structures designed to address their unique needs as insular territories.

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<sup>7</sup> The CTM is a single French territorial authority (collectivité territoriale unique), bringing together the Conseil Départemental and the Conseil Régional de la Martinique. Its executive body is the Executive Council, made up of 9 executive councillors, including a president. Its legislative body is the Martinique Assembly, composed of 51 territorial councillors and chaired by a president.



## 9.2 CONNECTIVITY AND ACCESSIBILITY TO THE STUDY AREA

### 9.2.1 Maritime Connectivity

#### 9.2.1.1 Commercial Traffic

The Macaronesian regions host significant maritime ports that facilitate substantial commercial traffic, playing a crucial role in their economies.

The Canary Islands' ports are managed by two main port authorities:

- **Port Authority of Las Palmas:** Oversees the ports of Las Palmas, Arinaga, Arrecife, Puerto del Rosario, and Salinetas. It is one of the 28 port authorities under Spanish' national port system, coordinated by Puertos del Estado. In 2023, it ranked among the top Spanish port authorities in terms of cargo volume.
- **Port Authority of Santa Cruz de Tenerife:** Manages the ports of Santa Cruz de Tenerife, Los Cristianos, La Estaca, San Sebastián de La Gomera, and Santa Cruz de La Palma. Also, part of the national port system, it plays a crucial role in regional maritime activities.

Both authorities operate under the coordination of Puertos del Estado, the Spanish government agency responsible for the national port system. Their strategic locations and significant cargo volumes position them as key players within Spain's maritime infrastructure.

The Canary Islands' strategic location in the Atlantic Ocean has established them as a pivotal maritime hub.

The primary commercial ports managed by Port Authority of Las Palmas are:

- **Port of Las Palmas (Puerto de la Luz):** Located on Gran Canaria, it is one of the busiest ports in the region. In 2023, the port handled approximately 20.8 million tonnes of cargo, reflecting its importance in transshipment and as a supply base for fishing fleets.
- **Port of Arinaga:** Also on Gran Canaria, the Port of Arinaga specializes in non-food bulk goods and offshore wind energy projects. In 2023, it handled approximately 177,326 tonnes of cargo.
- **Port of Salinetas:** Located in Telde on Gran Canaria, the Port of Salinetas specializes in handling liquid bulk cargoes, particularly fuels. It serves as a crucial hub for the distribution of these commodities within the archipelago.
- **Port of Arrecife:** Serving the island of Lanzarote, it handled approximately 1.5 million tonnes of cargo in 2023, supporting the island's tourism and fishing industries.

- **Port of Puerto del Rosario:** Located on Fuerteventura, this port managed around 1.2 million tonnes of cargo in 2023, facilitating the island's supply chain and economic activities.

Figure 18. Ports managed by Las Palmas Port Authority





*Port of las Luz – Las Palmas*

While the ports under the umbrella of Port Authority of Santa Cruz de Tenerife are:

- **Port of Santa Cruz de Tenerife:** Situated on Tenerife, this port managed around 14 million tonnes of cargo in 2023, serving as a key point for imports and exports, as well as cruise ship operations.
- **Port of Los Cristianos:** Located in the south of Tenerife, the Port of Los Cristianos is one of the busiest passenger ports in Spain. It serves as a primary gateway for ferries connecting Tenerife with the neighbouring islands of La Gomera, El Hierro, and La Palma. The port's strategic position makes it a vital hub for inter-island travel and tourism, handling a significant volume of passenger traffic annually.
- **Port of La Estaca:** Situated on the island of El Hierro, the Port of La Estacada is the main maritime access point to the island. It accommodates both passenger ferries and cargo vessels, ensuring the supply of goods and services to El Hierro. The port has undergone recent upgrades to improve its facilities and capacity, enhancing its role in the island's connectivity.
- **Port of San Sebastián de La Gomera:** As the principal port of La Gomera, the Port of San Sebastián de La Gomera handles regular ferry services to and from Tenerife,



facilitating the movement of residents and tourists. The port also supports cargo operations, contributing to the island's economy by ensuring the steady flow of goods.

- **Port of Santa Cruz de La Palma:** Located in the capital of La Palma, this port is a crucial node for both passenger and freight transport. It offers ferry connections to Tenerife and other islands, as well as mainland Spain. The port also serves as a port of call for cruise ships, boosting the island's tourism sector.

Figure 19. Ports managed by Las Palmas Port Authority





The Azores' maritime infrastructure is vital for inter-island connectivity and external trade. Key commercial ports include:

- **Port of Ponta Delgada:** On São Miguel Island, it is the main port of the Azores, handling approximately 1 million tonnes of cargo in 2023, serving as a central hub for goods distribution within the archipelago.
- **Port of Praia da Vitória:** Located on Terceira Island, this port managed around 600,000 tonnes of cargo in 2023, supporting both commercial and military activities.
- **Port of Horta:** On Faial Island, it handled approximately 300,000 tonnes of cargo in 2023, playing a significant role in regional trade and tourism.

Figure 20. Main commercial Ports in Azores







Madeira's ports are essential for its economy, particularly in tourism and goods importation. The primary commercial port is:

- **Port of Funchal:** Located in the capital city, it handled approximately 1.2 million tonnes of cargo in 2023, serving as the main entry point for goods and a popular stop for cruise ships. **The Port of Funchal** features multiple docking facilities. The **North Pier (Cais Norte)** accommodates cruise ships with a length of 260 meters and a depth of 7.5 meters. **Cais 4** is designated for navy patrol vessels. The **RO-RO ramp** serves RO-RO ferries with a ramp width of 32 meters and a quay length of 150 meters. **Cais 8** is another cruise ship dock, measuring 330 meters with a depth of 8 meters. **Cais 2** is the largest, catering to cruise ships, warships, and mega yachts, with a length of 425 meters and a depth of 10 meters. **Cais 3** is another cruise dock, 347 meters long with an 11-meter depth. The **Terminal Cimentos dos Socorridos** is a cargo terminal located 3.5 nautical miles west of the Port of Funchal, equipped with two mooring dolphins, a 200-meter pontoon, and three mooring buoys. It accommodates ships up to 130 meters long with an 8-meter depth.
- **Port of Caniçal:** primary hub, managing 919,291 tons, which accounts for approximately 57% of the total volume handled by APRAM. The Port of Caniçal has several specialized docking areas. The **North Pier (Cais Norte)** is used for cargo ships, handling containers, asphalt, cereals, and cement, with a length of 420 meters and a depth of 8 meters. The **South Pier (Cais Sul)** accommodates RO-RO ferries and cargo ships, featuring a 28.5-meter-wide ramp for containers and RO-RO operations. The **Liquid Bulk Terminal (CLCM)** is equipped with four mooring buoys for ships up to 180 meters long, handling liquid fuels and gas, with a depth of 15 meters. The **Berthing Pier (Comp Cais**

**Acostável)** has a berthing length of 380 meters, an entrance protection quay of 250 meters, and a depth of 12 meters. Additionally, the **Interior West of the North Pier** serves as a shelter for fishing vessels and fish unloading.

Figure 21. Main commercial Ports in Madeira





All, these ports are integral to the economic vitality of their respective regions, facilitating trade, tourism, and transportation.

Martinique's Key commercial ports include:

- **Port of Fort-de-France:** Located in the capital city, it is Martinique's principal commercial port, handling over 2 million tonnes of cargo annually. This port serves as a critical hub for imports and exports, connecting the island to the global market.
- **Port of Le Robert:** Situated on the northeastern coast, it focuses on smaller-scale cargo and fishing activities, supporting the local economy and nearby communities.
- **Port of Le Marin:** Located in the southern region, it specializes in yacht and pleasure craft services, contributing significantly to Martinique's thriving tourism industry.



Figure 22. Main Ports in Martinique



#### 9.2.1.2 Inter-island connectivity

Maritime connectivity is vital for the economies and daily life in the Macaronesian regions. Given their geographical isolation and dependence on inter-island and mainland trade, ferry services ensure the efficient transport of passengers and essential goods, sustaining economic activities such as tourism, agriculture, and fisheries.

Maritime connectivity is ensured by two main categories of port terminals:

- **Ferry Terminal:** A ferry terminal is a port facility specifically designed for the boarding and disembarking of passengers and vehicles using ferries as a mode of transport. These terminals typically include areas for passenger control, vehicle parking, waiting zones, customs, and security services, as well as ramps or specialized docks to

facilitate vehicle access onto the ferries. Their primary purpose is to ensure connectivity between locations separated by bodies of water, such as islands or continents.

- **Ro-Ro Terminal (Roll-on/Roll-off):** A Ro-Ro terminal is a port facility specialized in handling vehicles and machinery transported on Ro-Ro vessels. These ships are designed for cargo to roll on and off using ramps, eliminating the need for cranes. Ro-Ro terminals feature large parking and manoeuvring areas, as well as specific infrastructure for direct vehicle access to the ship, such as fixed or mobile ramps. This type of terminal is essential for the transportation of cars, trucks, buses, and heavy equipment.

Inter-island passengers have the option to travel using two primary types of vessels: **ferries** (dedicated passenger vessels) and **RO-PAX ships**, which combine passenger services with the transportation of vehicles.

- **Ferries:** These vessels are designed exclusively for passengers and typically offer amenities such as comfortable seating, catering services, and sometimes entertainment options. They are ideal for short to medium-distance trips and are widely used for inter-island connectivity.
- **RO-PAX Ships:** RO-PAX (Roll-on/Roll-off Passenger) ships serve dual purposes, accommodating passengers and vehicles, including cars, trucks, and motorcycles. These vessels are particularly useful for travellers who need to transport vehicles for personal use or business, as well as for facilitating the movement of goods between islands.

Ferries offering different options tailored to the needs of passengers. Among these, conventional ferries provide a comfortable and spacious travel experience for longer journeys, while fast ferries focus on speed and efficiency, making them ideal for shorter routes or time-sensitive travellers. Both modalities ensure flexibility and convenience, enhancing connectivity and travel experiences.

- **Conventional Ferries:** These are larger vessels with ample capacity for passengers and luggage, designed for comfort on longer routes. They generally operate at moderate speeds but provide a more relaxed and spacious travel experience.
- **Fast Ferries:** Fast ferries are high-speed vessels that prioritize reduced travel times. These boats often use catamaran or hydrofoil designs, allowing them to achieve higher speeds while maintaining stability. Fast ferries are particularly appealing for shorter routes or for passengers seeking quick and efficient transportation.

Figure 23. Ferries and RO- PAX Options



For residents, these connections are indispensable for accessing healthcare, education, and employment opportunities. Additionally, the ferry network enhances regional cohesion and facilitates cultural and social exchanges, making it a cornerstone of the islands' socio-economic stability. The high volume of inter-island passenger traffic underscores the reliance of these economies on robust and reliable maritime links.

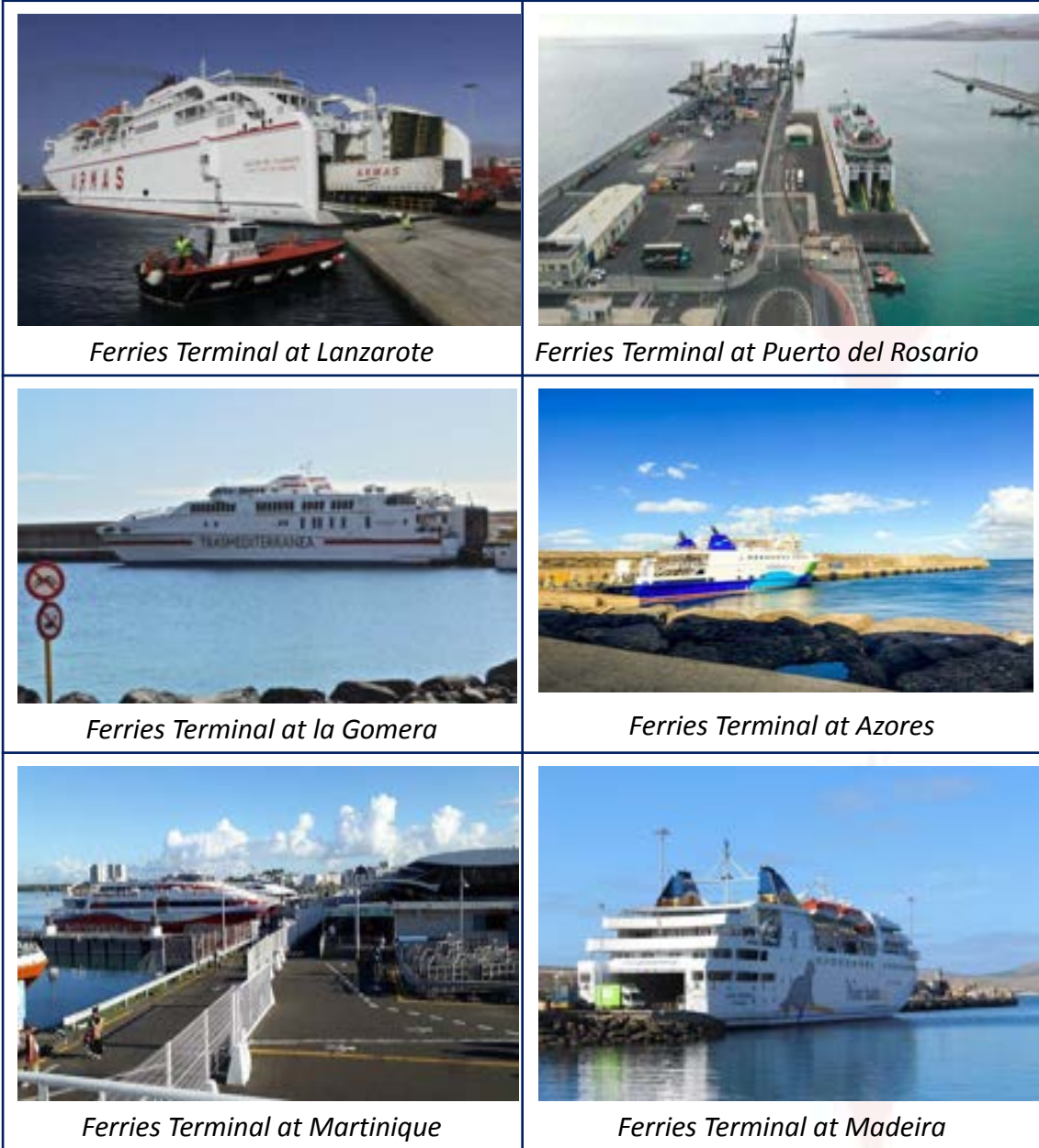
**For the purpose of this Report, ferry terminals are an essential element in ensuring inter-island connectivity. They allow tourists to diversify their experiences by facilitating travel between islands, enabling them to plan itineraries that include visits to multiple islands within a single trip. This enhances the appeal of archipelagos such as the Canary Islands, Madeira, Martinique, and the Azores as multifaceted travel destinations, fostering regional tourism integration and economic growth.**

**Additionally, the high concentration of travellers passing through ferry terminals represents a valuable opportunity for tour operators to use these locations as exceptional points of sale. For longer routes, ferry operators can also offer tailored services to meet the needs of both tourists and residents, enhancing their overall travel experience and generating additional revenue streams.**

Figure 24. Main ferries and polyvalent terminals in the Region

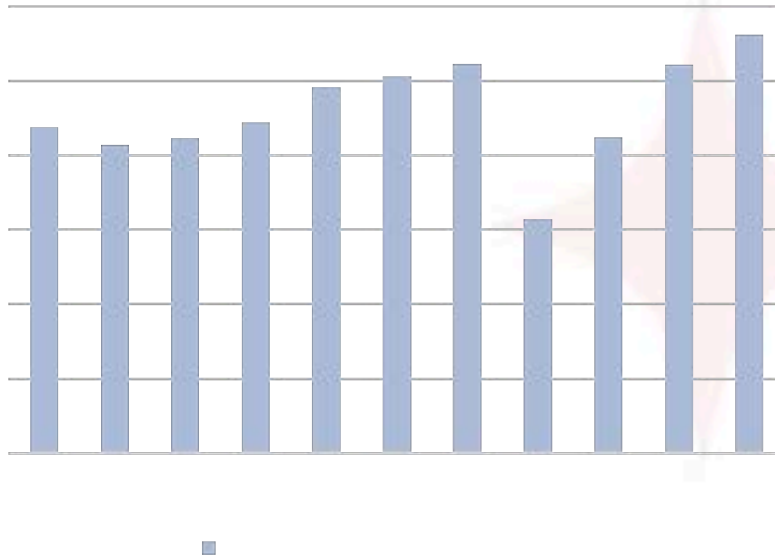






The evolution of inter-island passenger traffic under the Tenerife Port Authority from 2013 to 2023, showcasing a significant volume of movement, particularly in recent years. After steady growth from 2013 to 2019, reaching over 5.2 million passengers annually, the COVID-19 pandemic caused a sharp decline in 2020, with numbers plummeting to 3.1 million due to travel restrictions and reduced activity. Despite this setback, the recovery has been remarkable, with traffic rebounding to pre-pandemic levels in 2022 at 5.22 million passengers and reaching a record high of 5.62 million in 2023. This highlights the critical role of inter-island connectivity in the region, reflecting a robust and growing demand for ferry services and emphasizing the large-scale movement facilitated by these ports (Figure 22).

Figure 25. Local Passenger Traffic (Interisland) - Tenerife Port Authority

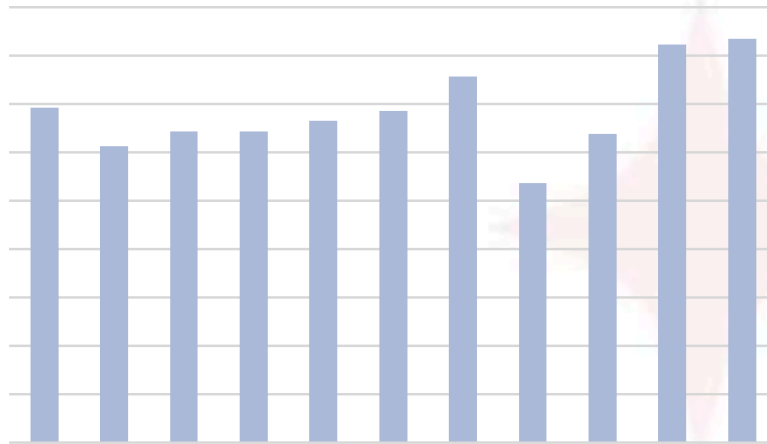


Source: Tenerife Port Authority

The graph below shows the evolution of inter-island passenger traffic managed by the Las Palmas Port Authority from 2013 to 2023, highlighting a significant and growing number of users. After a period of relative stability from 2013 to 2018, with figures fluctuating around 1.3 million passengers annually, traffic peaked at 1.51 million in 2019. However, the COVID-19 pandemic caused a sharp decline in 2020, with numbers dropping to 1.07 million due to travel restrictions and reduced activity. A robust recovery followed, with passenger traffic rebounding to 1.64 million in 2022 and reaching a record high of 1.67 million in 2023. These figures underline the critical role of the Las Palmas Port Authority in facilitating inter-island connectivity and accommodating a large-scale movement of passengers, showcasing the resilience and growing demand for regional ferry services.



Figure 26. Local Passenger Traffic (Interisland) – Las Palmas Port Authority



Source: Las Palmas Port Authority

Figure 24 shows the evolution of inter-island passenger traffic managed by Portos dos Açores, S.A., from 2013 to 2021, with data for 2022 and 2023 not available. Passenger traffic steadily increased from 927,000 in 2013 to a peak of 1.17 million in 2017, maintaining similar figures through 2019. The COVID-19 pandemic caused a sharp decline in 2020, with traffic dropping to 622 thousand passengers. However, by 2021, passenger numbers rebounded to 1.12 million, closely matching pre-pandemic levels, suggesting a strong recovery. Without updated data for 2022 and 2023, it is not possible to confirm whether this positive trend has continued.

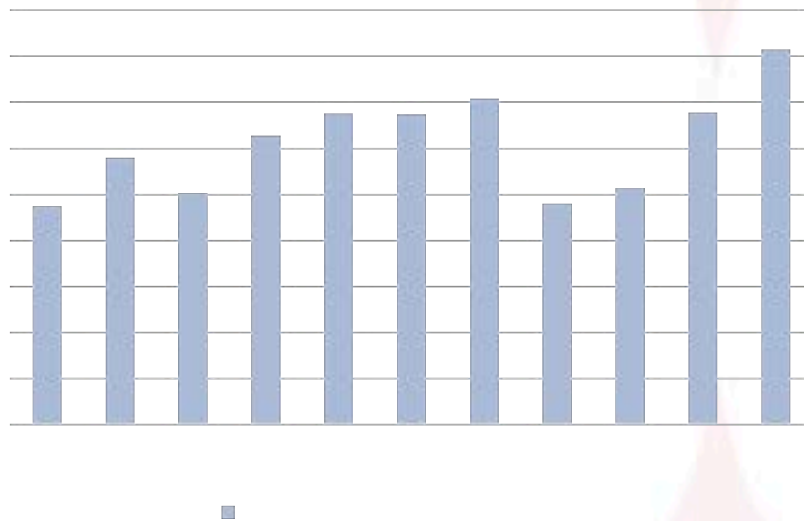
Figure 27. Local Passenger Traffic (Interisland) - Azores



Source: Portos dos Açores, S.A.

Interisland movements experienced steady growth from 476 thousand in 2013 to a peak of 710 thousand in 2019, highlighting a consistent increase in demand for inter-island connectivity. However, the COVID-19 pandemic caused a sharp decline in 2020, with traffic falling to 481 thousand passengers. Recovery began in 2021 and continued steadily, reaching 817 thousand passengers in 2023—a new record high. This strong rebound not only demonstrates Madeira's resilience but also highlights the growing importance of its inter-island ferry services, which have now surpassed pre-pandemic levels. This represents a substantial increase over the decade, highlighting Madeira's resilience and the growing demand for its inter-island ferry services, making it the port with the most remarkable growth from 2013 to 2023 with a Compound Annual Growth Rate (CAGR) of 5.5%.

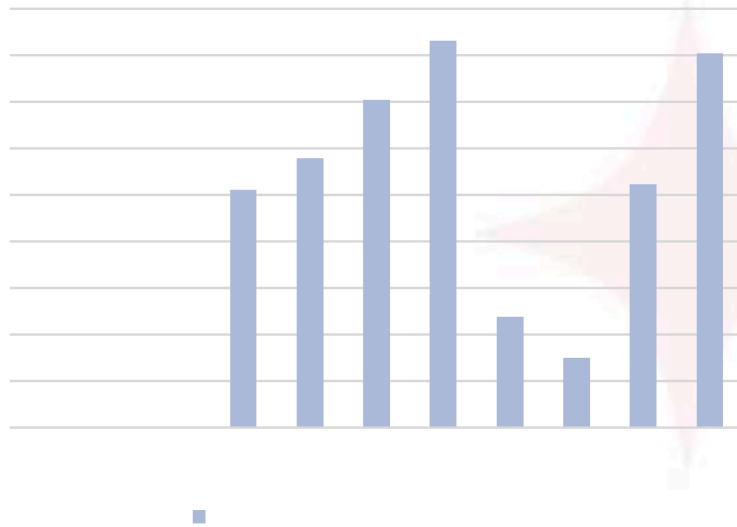
Figure 28. Local Passenger Traffic (Interisland) - Madeira



Source: APRAM

Finally, the graph below illustrates the evolution of inter-island passenger traffic managed by the Grand Port Maritime de la Martinique from 2016 to 2023, with no data available for the years 2013 to 2015. Passenger numbers showed steady growth from 102,000 in 2016 to a peak of 166 thousand in 2019, reflecting increasing demand for inter-island connectivity. However, the COVID-19 pandemic caused a dramatic drop, with traffic plummeting to 48 thousand in 2020 and 30 thousand in 2021. There has been a notable recovery in 2022 and 2023, with 161 thousand passengers recorded in the latter year close to the pre-pandemic figures (Figure 26).

Figure 29. Local Passenger Traffic (Interisland) - Martinique



Source: Grand Port Maritime de la Martinique

### 9.2.2 Air Connectivity

The Macaronesian regions are well-connected by air, each hosting several airports that facilitate both international and domestic travel.

The Canary Islands boast eight airports, with the most significant being:

- **Gran Canaria Airport (LPA):** Located near Las Palmas, it is the busiest in the archipelago. In 2023, it handled approximately 13 million passengers, marking a 6.3% increase compared to 2022.
- **Tenerife South Airport (TFS):** Situated in the south of Tenerife, it recorded around 11.5 million passengers in 2023, an 8.9% rise from the previous year.
- **Tenerife North-Ciudad de La Laguna Airport (TFN):** Located in the north of Tenerife, it serves both domestic and international flights, handling approximately 5.5 million passengers in 2023.
- **César Manrique-Lanzarote Airport (ACE):** Serving the island of Lanzarote, it handled approximately 8.2 million passengers in 2023, a 5% increase from the previous year.
- **Fuerteventura Airport (FUE):** Catering to Fuerteventura, it supports both domestic and international routes, with a passenger traffic of around 6 million in 2023.

Collectively, the Canary Islands' airports managed over 48.4 million passengers in 2023, reflecting an 11.4% growth compared to 2022.

The Azores archipelago comprises nine islands, each with its own airport. The primary international gateways are:

- **João Paulo II Airport (PDL):** Located in Ponta Delgada on São Miguel Island, it is the main international airport, handling approximately 2.47 million passengers in 2023.
- **Lajes Airport (TER):** Situated on Terceira Island, it operates international flights, primarily during the summer season, with a passenger traffic of around 963,338 in 2023.
- **Santa Maria Airport (SMA):** Located on Santa Maria Island, it also accommodates international flights, handling approximately 126,480 passengers in 2023.

Other airports in Madeira receiving international passengers through connections with Portugal mainland are:

- **Pico Airport (PIX)** on Pico Island with a traffic in 2023 of 207,428 passengers.
- **São Jorge Airport (SJZ)** on São Jorge Island with a traffic in 2023 of 103,132 passengers.
- **Flores Airport (FLW)** on Flores Island with a traffic in 2023 of 98,406 passengers.
- **Graciosa Airport (GRW)** on Graciosa Island with a traffic in 2023 of 69,602 passengers.
- **Corvo Airport (CVU)** on Corvo Island with a traffic in 2023 of 11,648 passengers.

The remaining islands have regional airports facilitating inter-island travel but also connections to mainland Portugal which is another important gate for international passengers. Thus,, Horta Airport receive direct flights from mainland (i.e Lisbon).

Madeira's air connectivity is primarily served by:

- **Madeira Airport (FNC):** Also known as Cristiano Ronaldo International Airport, located in Santa Cruz, it is the main international gateway to the region.
- **Porto Santo Airport (PXO):** Serving the island of Porto Santo, it handles both domestic and some international flights.

Martinique's air connectivity is primarily served by<sup>8</sup>:

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<sup>8</sup> Although this report focuses solely on Martinique, it is worth highlighting that connectivity to the island can benefit from other airports in the French Caribbean, namely:

- Guadeloupe's air connectivity is primarily served by Pointe-à-Pitre International Airport (PTP): Located in Abymes, it is the main gateway to the Guadeloupe archipelago, handling both international and domestic flights. serves as a hub for flights connecting the Caribbean, Europe, and North America.

- **Martinique Aimé Césaire International Airport (FDF):** Situated in Le Lamentin, near Fort-de-France, it is the principal airport of Martinique. The airport serves a mix of international flights to Europe, North America, and other Caribbean islands.

In 2023, air connectivity across the Canary Islands, Madeira, Azores, and French Caribbean territories showcased notable passenger traffic growth, reflecting their importance as tourism and transport hubs.

In the Canary Islands, Gran Canaria Airport (LPA) recorded the highest traffic, handling 13 million passengers, a 6.3% increase compared to 2022. Tenerife South Airport (TFS) followed closely, serving 11,5 million, representing an 8.9% growth.

In the Azores, João Paulo II Airport (PDL) on São Miguel Island maintained its position as the primary gateway to the archipelago, managing 2,5 million passengers in 2023, a 7.4% increase from the previous year.

For Madeira, Madeira Airport (FNC) handled 4,5 million passengers in 2023, showing a 6.7% rise from the prior year.

Martinique Aimé Césaire International Airport (FDF) in Martinique recorded 1,9 million 000 passengers, reflecting an 8.6% rise<sup>9</sup>. The table below shows a detailed breakdown.

Table 15. Air traffic statistics (Passengers)

Region	Airport	Passengers 2022 (000s)	Passengers 2023 (000s)	Growth (%)
The Canary Islands	Gran Canaria (LPA)	12,230	13,000	6.3
	Tenerife South (TFS)	10,560	11,500	8.9
	Tenerife North-Ciudad de La Laguna (TFN)	5,200	5,500	5.8
	César Manrique-Lanzarote (ACE)	7,800	8,200	5
	Fuerteventura (FUE)	5,600	6,000	7.1
Azores	João Paulo II (PDL)	2,300	2,470	7.4
	Lajes (TER)	910	963	5.9
	Horta Airport (HOR)	276	298	7.7
	Pico Airport (PIX)	181	207	14.6
	Santa Maria (SMA)	120	126	5.4

- Saint Martin and Saint Barthélemy's air connectivity is primarily served by: i) Grand Case-Espérance Airport (SFG): Located on the French side of Saint Martin, it focuses on regional flights and ii) Gustaf III Airport (SBH): Commonly known as Saint Barthélemy Airport, it is in St. Jean and serves as a key gateway for the island, accommodating small aircraft and charter.

<sup>9</sup> In the French Caribbean, Pointe-à-Pitre International Airport (PTP) in Guadeloupe led the way with 2,5 million passengers in 2023, an 8.7% increase.

Region	Airport	Passengers 2022 (000s)	Passengers 2023 (000s)	Growth (%)
	Sao Jorge Airport	89	103	14.6
	Flores Airport	84	98	15.8
	Graciosa Airport	60	70	14.6
	Corvo Airport	10	12	14.6
Madeira	Madeira Airport (FNC)	4,300	4,590	6.7
	Porto Santo (PXO)	230	247	7.3
Guadeloupe	Pointe-à-Pitre International (PTP)	2,300	2,500	8.7
Martinique	Martinique Aimé Césaire International (FDF)	1,750	1,900	8.6
Saint Martin	Grand Case-Espérance (SFG)	150	160	6.7
Saint Barthélemy	Gustaf III (SBH)	95	100	5.3

Source. Own elaboration based on airports statistics

**Airports play a crucial role in the subject of this study as they serve as the primary gateway for tourist arrivals being also indispensable for those home ports for the cruise industry. Moreover, airports enable inter-island connectivity solutions for travellers who wish to explore multiple islands and prefer air transport mode over ferries or RO-PAX vessels, offering a faster and more convenient alternative that enhances the overall travel experience.**

Figure 30. Main airports in the Region







*Fuerteventura Airport (FUE)*



*Martinique Aimé Césaire International  
Airport (FDF)*



*Lajes Airport (TER)*



*Santa Maria Airport (SMA)*



*Madeira Airport (FNC)*



*Porto Santo Airport (PXO)*



*João Paulo II Airport (PDL)*



### 9.3 THE BLUE ECONOMY WITHIN THE AREA OF STUDY

The **blue economy** refers to the sustainable use of ocean resources to drive economic growth, improve livelihoods, and create jobs while preserving the health of marine ecosystems. This concept encompasses a wide range of economic activities related to oceans, seas, and coasts, aiming to balance economic development with environmental conservation.

According to the World Bank, the blue economy involves *"the sustainable use of ocean resources for economic growth, improved livelihoods, and jobs while preserving the health of ocean ecosystems."*

The blue economy aims to integrate economic development with environmental sustainability, promoting practices that ensure the long-term health of marine and coastal ecosystems.

The most representative sectors of the blue economy include:

- **Coastal and marine tourism:** Recreational and tourism activities in coastal and marine areas.
- **Maritime transport:** Moving goods and people via sea routes.
- **Fisheries and aquaculture:** Harvesting and farming marine species for human consumption and other uses.
- **Marine renewable energy:** Generating energy from sources such as offshore wind, tidal, and wave power.
- **Marine biotechnology:** Research and development of products derived from marine organisms for applications in medicine, cosmetics, and other fields.
- **Seabed mining:** Extracting minerals and resources from the ocean floor.
- **Conservation and ecosystem services:** Protecting marine biodiversity and utilizing services such as carbon capture and coastal protection.

The aim of this study is to focus on the first of the sub-sectors (coastal and marine tourism) but while some of the above may offer synergies or complementary activities to it, specific sections will be devoted to, or referred to, in the report.

The European Union (EU) and the European Commission have developed various initiatives, regulations, and studies to promote and regulate a sustainable blue economy. Below are some key documents:

1. **Communication on a New Approach for a Sustainable Blue Economy in the EU**<sup>10</sup>:  
Published in May 2021, this communication outlines a detailed agenda to transform the

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<sup>10</sup> Available at the time of writing the report at: [https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/european-commission-adopts-new-communication-sustainable-blue-economy-2021-05-17\\_en](https://research-and-innovation.ec.europa.eu/news/all-research-and-innovation-news/european-commission-adopts-new-communication-sustainable-blue-economy-2021-05-17_en)

EU's blue economy towards sustainability, addressing aspects such as decarbonization, circular economy, and marine biodiversity conservation.

2. **Atlantic Action Plan 2.0**<sup>11</sup>: Adopted in July 2020, this plan updates the EU's Atlantic maritime strategy, focusing on a sustainable, resilient, and competitive blue economy in the Atlantic region.
3. **Council Conclusions on a Sustainable Blue Economy**<sup>12</sup>: In May 2021, the EU Council approved conclusions emphasizing the need for efficient ocean governance based on a sustainable blue economy, highlighting pillars such as healthy oceans, knowledge, prosperity, and social equity.
4. **2020 EU Blue Economy Report**<sup>13</sup>: This report provides an overview of the performance of EU economic sectors related to oceans and coastal areas, offering data and analysis on their economic contribution.
5. **EU Biodiversity Strategy for 2030**<sup>14</sup>: Adopted in May 2020, this strategy aims to protect nature and reverse ecosystem degradation, including specific actions for marine and coastal ecosystems.

These documents reflect the EU and European Commission's commitment to developing a blue economy that balances economic growth with environmental sustainability and marine resource conservation.

### 9.3.1 Port sector

#### 9.3.1.1 General Overview

The port sector is a cornerstone of the blue economy. The region's ports not only facilitate international trade and passenger transport but also serve as strategic hubs for logistics, tourism, and maritime research.

Their geographically privileged position, at the crossroads of Europe, Africa, and America, gives them a prominent role in global shipping routes, solidifying their status as a key economic driver for the region.

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<sup>11</sup> Available at the time of writing the report at: <https://atlantic-maritime-strategy.ec.europa.eu/en/atlantic-strategy-glance/atlantic-strategy>

<sup>12</sup> Available at the time of writing the report at: <https://www.consilium.europa.eu/en/press/press-releases/2021/05/26/council-conclusions-on-a-sustainable-blue-economy/>

<sup>13</sup> Available at the time of writing the report at: [https://ec.europa.eu/commission/presscorner/detail/en/ip\\_20\\_986](https://ec.europa.eu/commission/presscorner/detail/en/ip_20_986)

<sup>14</sup> Available at the time of writing the report at: [https://environment.ec.europa.eu/strategy/biodiversity-strategy-2030\\_en](https://environment.ec.europa.eu/strategy/biodiversity-strategy-2030_en)

Moreover, the ports are indispensable for ensuring the supply of essential goods to the islands, including food products, construction materials, and fuels, which are crucial for sustaining daily life and local economic activities. They are also the primary gateways for exporting the archipelagos' most iconic products, such as bananas and tomatoes from the Canary Islands, wine from Madeira and the Azores, and fish and seafood products from Cape Verde.

Within the blue economy, Macaronesia's ports create significant synergies with other strategic sectors. For instance, their connection to the shipbuilding and repair industry fosters the creation of specialized jobs and the modernization of maritime fleets, driving technological innovation. In the fishing sector, the ports act as key points for landing and marketing, supporting sustainable fishing practices that ensure the preservation of marine resources. Additionally, coastal tourism depends heavily on these ports, as they provide the necessary infrastructure for cruise traffic and recreational vessels, boosting the development of local services such as hospitality, retail, and nautical activities.

Furthermore, the ports hold substantial potential for advancing marine renewable energies, such as offshore wind and wave energy, offering opportunities for economic diversification and contributing to the region's energy transition.

These interactions reinforce Macaronesia's role as a model for sustainable development and an example of sector integration within the blue economy.

### ***9.3.1.2 Legal framework, administration, and management of these ports***

In Spain, port policy is governed by Royal Legislative Decree 2/2011, of September 5, which establishes the legal framework for the planning, construction, organization, management, and economic-financial regime of ports of general interest.

Spain's port system includes a total of **28 Port Authorities**, each responsible for managing one or more ports of general interest. Across the country, there are **46 ports of general interest**, strategically distributed among these authorities to serve as key nodes in Spain's maritime logistics and connectivity.

The ports of general interest in Spain enjoy management autonomy, operating under a governance structure with two main bodies: the Board of Directors and the President. These bodies include representatives from the central, regional, and local administrations, as well as from companies and organizations within the port community. However, most of the representation is held by the regional government, reflecting its significant influence in port management. All Port Authorities are coordinated by **Puertos del Estado**, the public entity responsible for implementing Spain's port policies. Puertos del Estado operates under the authority of the **Ministry of Transport, Mobility, and Urban Agenda**, ensuring that national strategies for maritime logistics, sustainability, and connectivity are effectively executed across the country.

In the Canary Islands, there are two Port Authorities managing the region's ports of general interest.

- The **Port Authority of Las Palmas** oversees five ports of general interest: the Port of Las Palmas on Gran Canaria, the Port of Arrecife on Lanzarote, the Port of Puerto del Rosario on Fuerteventura, the Port of Arinaga on Gran Canaria, and the Port of Salinetas, also located on Gran Canaria.
- The **Port Authority of Santa Cruz de Tenerife** is responsible for six ports of general interest. These include the Port of Santa Cruz de Tenerife, the Port of Los Cristianos, and the Port of Granadilla, all located on the island of Tenerife. Additionally, it manages the Port of Santa Cruz de La Palma on La Palma, the Port of San Sebastián de La Gomera on La Gomera, and the Port of La Estaca on El Hierro. These ports play a critical role in ensuring connectivity and supporting the economic activity of the western islands of the Canary archipelago.

**Puertos Canarios** is a public business entity created under **Law 14/2003, of April 8**, which governs the regional ports of the Canary Islands. This law provides the framework for the planning, construction, management, and operation of ports that are not classified as ports of general interest, which are under the jurisdiction of the State and managed by the Port Authorities of Las Palmas and Santa Cruz de Tenerife.

Puertos Canarios is responsible for managing **46 regional ports and harbours**, including fishing ports, marinas, and small commercial ports across the Canary Islands. These facilities enhance the capillarity of the transportation network for goods and passengers, ensuring the supply of essential goods and the mobility of residents and visitors, particularly on smaller islands. By providing crucial infrastructure, Puertos Canarios supports inter-island connectivity and strengthens economic and social cohesion throughout the archipelago.

The entity operates under the supervision of the “**Consejería de Obras Públicas, Transporte y Vivienda**” of the **Regional Government of the Canary Islands**, ensuring efficient management and sustainable development of the region’s port infrastructure. Excluding the management of ports of general interest, Puertos Canarios focuses on fostering local maritime activities and addressing the unique transportation needs of the Canary Islands.

The organization responsible for managing the commercial ports in Madeira is Administração dos Portos da Região Autónoma da Madeira, S.A. (“**APRAM**”)

APRAM is a public company under the jurisdiction of the Regional Government of Madeira, tasked with operating, maintaining, and developing the region’s port infrastructure. It manages major commercial ports such as the **Port of Funchal** (focused on cruise and tourist traffic) and the **Port of Caniçal** (dedicated to commercial and cargo traffic), as well as secondary ports, including **Porto Santo**.

The management of Madeira’s ports is regulated by the **Regional Legislative Decree No. 19/99/M**, which transformed the former public institution managing the ports into APRAM a public limited company with exclusive public capital. This transformation aimed to modernize port management by introducing a corporate structure, enhancing efficiency, competitiveness, and rationality in operations.

The law establishes APRAM's responsibilities, which include the economic operation, conservation, and development of ports, terminals, docks, and marinas in the Madeira Autonomous Region. It grants APRAM powers such as setting port tariffs, licensing activities within its jurisdiction, and managing public maritime domain lands and facilities. The decree also allows APRAM to exercise public authority functions, such as ensuring safety, enforcing regulations, and administering public lands within its jurisdiction, making it a key entity in the sustainable development of Madeira's maritime and port activities.

APRAM is also responsible for promoting maritime trade and ensuring the sustainability of the port sector in the Madeira archipelago.

The management of ports in the Azores is carried out by **Portos dos Açores, S.A.**, a public limited company with exclusively public capital.

Portos dos Açores, S.A. is responsible for managing **14 ports**. Namely: **Vila do Porto** (on Santa Maria Island), **Ponta Delgada** (on São Miguel Island), **Praia da Vitória and Pipas – Angra do Heroísmo** (on Terceira Island), **Praia da Graciosa** (on Graciosa Island), **Calheta and Velas** (on São Jorge Island), **Lajes do Pico, São Roque do Pico, and Madalena** (on Pico Island), **Horta** (on Faial Island), **Lajes das Flores and Santa Cruz das Flores** (on Flores Island), and **Casa – Corvo** (on Corvo Island), as well as others that may be assigned to it in the future. Its scope includes the operation, maintenance, and development of these facilities, along with the exercise of competencies and prerogatives as a "port authority" entrusted to it.

This port administration operates as a joint-stock company, established in 2003 and modified in 2011, with its sole shareholder being the Autonomous Region of the Azores. Its headquarters are located at Avenida Gago Coutinho e Sacadura Cabral No. 7, 9900-062 Horta, with the tax identification number (NIPC) 512 077 843 and the activity classification code (CAE) 74150.

As a public company, Portos dos Açores, S.A. resulted from the merger, by incorporation, of the former three regional port administrations (APSM, S.A., APTG, S.A., and APTO, S.A.) into the then-named Portos dos Açores, SGPS, S.A., which was created under Regional Legislative Decree No. 30/2003/A, of June 27. These entities succeeded the former Autonomous Boards of Regional Ports (Ponta Delgada, Angra do Heroísmo, and Horta).

The company operates under the legal framework established by the **Port System of the Azores**, approved by **Regional Legislative Decree No. 24/2011/A, of August 22**, which regulates port administration activities and defines its statutes and jurisdictional areas.

On October 21, 2019, **Portos dos Açores, S.A.** revised its statutes.

Portos dos Açores, S.A. operates under the supervision of the **Regional Government of the Azores**, specifically the **Regional Secretariat for Tourism, Mobility, and Infrastructure**, ensuring efficient and sustainable management of port infrastructure. Portos dos Açores, S.A. aims to foster the development of the maritime-port sector in the region, facilitating trade, passenger transport, and tourism, which are vital components of the archipelago's economy.

On the other hand, the ports of Martinique are managed by the **Grand Port Maritime de la Martinique (GPMM)**, a public entity responsible for administering the island's main port facilities, including the Port of Fort-de-France. This organization is tasked with the operation,

maintenance, and development of port infrastructure, playing a crucial role in the local economy by facilitating trade and maritime transport.

In addition to the main site in Fort-de-France, the **GPMM** includes several other important sites:

- **Pointe des Grives Container Terminal:** This terminal is entirely dedicated to container handling, with a handling capacity of more than 150,000 TEU containers per year.
- **Hydrobase:** Located in the eastern sector, this area is home to a petro-ore jetty, a bulk carrier hub and an area for ro-ro boats (Ro-ro).
- **Quai des Tourelles:** One of two cruise terminals, offering passenger services and ship repair facilities.
- **Pointe Simon Pier:** Built to accommodate cruise ships in transit, with direct access to downtown Fort-de-France. Dry dock: Specialized in ship repair, this basin welcomes ships in dry dock for maintenance work.
- **The Port of Le Robert:** more specialised in regional transport (cargo ships, etc.)

These sites allow the GPMM to efficiently manage a variety of port activities and play a crucial role in the island's economy

GPMM is a public entity under the jurisdiction of the **Ministry of Ecological Transition and Territorial Cohesion** of the French government. This oversight ensures that port operations align with national policies on transportation, environmental protection, and sustainable development.

**GPMM** was established by **Decree No. 2012-1104 of October 1, 2012**, which created this public body<sup>15</sup>. In terms of governance and administration, the GPMM has the following bodies:

- **Supervisory Board:** This body includes representatives from municipalities and groups of territorial communities, such as a member of the municipal council of Fort-de-France and a member of the Central Martinique agglomeration community council. Additionally, three elected representatives from the Chamber of Commerce and Industry of the Martinique region, appointed by the minister responsible for maritime ports, are also included.

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<sup>15</sup> The management of Martinique's ports is regulated by French national port legislation, particularly the Code des Transports, as well as specific decrees and regulations applicable to overseas territories. The transformation of French ports into "Grands Ports Maritimes" under the French Law No. 2008-660 of July 4, 2008, aimed to modernize port governance, introducing a structure that enhances efficiency, competitiveness, and transparency in operations while maintaining a focus on sustainable development.



- **Executive Board:** Responsible for the port's operational management, it implements the decisions of the Supervisory Board and ensures the day-to-day functioning of the port facilities.

The organization responsible for managing the commercial ports in Martinique is the **Grand Port Maritime de la Martinique (GPMM)**.

The management of Martinique's ports is regulated by French national port legislation, particularly the Code des Transports, as well as specific decrees and regulations applicable to overseas territories. The transformation of French ports into "Grands Ports Maritimes" under the French Law No. 2008-660 of July 4, 2008, aimed to modernize port governance, introducing a structure that enhances efficiency, competitiveness, and transparency in operations while maintaining a focus on sustainable development.

### 9.3.1.3 Key Figures

In 2023, the total cargo traffic across the regions of the Canary Islands, Azores, Madeira, and Martinique amounted to **51,912,307 tons**, with Tenerife contributing **13,539,300 tons (26.1%)**, Las Palmas **27,874,049 tons (53.8%)**, Azores **2,573,524 tons (5.0%)**, Madeira **1,612,323 tons (3.1%)**, and Martinique **3,313,111 tons (6.4%)**.

When comparing the ratio of total traffic to population across the regions, Las Palmas stands out with the highest ratio of **24.33 tons per inhabitant**, significantly exceeding Tenerife (**12.69**), Azores (**10.50**), Martinique (**9.03**), and Madeira (**6.28**). This disparity is largely driven by the high volume of containerized cargo handled in Las Palmas under transshipment operations, which accounted for **52.4%** of its container traffic in 2023. Unlike the other regions, where traffic volumes more closely reflect the import-export needs of their populations and local economies, the elevated ratio in Las Palmas highlights its strategic role as a transshipment hub.

When comparing the ratio of total traffic to GDP per capita across the regions, Las Palmas displays the highest ratio, with **1,250 tons per unit of GDP per capita**, significantly surpassing Tenerife (**607**), Martinique (**122**), Azores (**164**), and Madeira (**90**). This elevated ratio in Las Palmas is largely influenced again by its role as a transshipment hub.

Below, we present a summary of the most relevant data, offering an overview of the key metrics across the regions. Following this, a detailed breakdown will be provided for each region, highlighting specific aspects of their cargo traffic, container operations, and their roles within the broader trade and logistics landscape.

Table 16. Key Figures of Port System in different regions

	TENERIFE	LAS PALMAS	AZORES	GMPMM MADEIRA	MARTINIQUE
<b>Total Traffic</b>	<b>13,539,300</b>	<b>27,874,049</b>	<b>2,573,524</b>	<b>1,612,323</b>	<b>3,313,111</b>
Dry Bulk Cargo	376,356	379,653	452,751	416,097	352,097
Liquid Bulk Cargo	4,136,791	6,904,940	513,992	368,748	1,288,184
General Cargo	8,287,421	18,261,251	1,606,781	827,478	577,141



	TENERIFE	LAS PALMAS	AZORES	GMPMM MADEIRA	MARTINIQUE
Supplies & Bunkering	734,045	2,327,484	n/a	n/a	n/a
TEUS	496,691	1,205,296	123,200	133,056	187,252
Transshipment (%)	14,8%	52,4%	n/a	n/a	n/a
Population (inhabitant)	1,067,173	1,145,843	245,005	256,543	366,981
GDP per capita	22,303	22,303	15,700	17,900	27,179
Ratio Traffic / Population	12,69	24,33	10,50	6,28	9,03
Ratio Traffic / GDP per capita	607	1,250	164	90	122

Source: Own Elaboration

### Las Palmas Port Authority

In 2023, the total traffic managed by the Port Authority of Las Palmas reached **25,545,844 tons**, reflecting a slight decrease of **0.8%** compared to the previous year. This total is distributed among four categories of cargo: liquid bulk, dry bulk, containerized cargo, and general cargo. Below is an analysis of each category's contribution to the total traffic, along with their respective growth rates compared to 2022.

- **Liquid Bulk** accounted for **6,904,940 tons**, representing approximately **27%** of the total traffic. This category experienced the most significant decline among all cargo types, with a decrease of **13.1%** compared to 2022.
- **Dry Bulk** recorded **379,653 tons**, making up about **1.5%** of the total. Despite being the smallest category, it showed growth of **4.5%** from the previous year, highlighting a slight recovery in this segment.
- **Containerized Cargo** remains the largest category, with a total of **13,401,461 tons**, which is **52.4%** of the overall traffic. This category showed strong growth of **4.5%** year-on-year, reinforcing its central role in port operations.
- **General Cargo** reached **4,859,790 tons**, contributing to approximately **19%** of the total traffic. It grew by **1.7%**, marking a moderate but consistent increase over the previous year.

Table 17. Las Palmas Port Authority- General Movement of Goods (Tons). Year 2021-2023

Type of Cargo	2021 (Tons)	2022 (Tons)	2023 (Tons)	Variation % (23/22)
Liquid Bulk	8,256,892	7,808,563	6,904,940	-13.1%
Dry Bulk	423,729	362,686	379,653	4.5%
Containerized Cargo	13,060,685	12,804,803	13,401,461	4.5%

Type of Cargo	2021 (Tons)	2022 (Tons)	2023 (Tons)	Variation % (23/22)
General Cargo	4,187,948	4,774,928	4,859,790	1.7%
<b>Total</b>	<b>25,929,254</b>	<b>25,750,980</b>	<b>25,545,844</b>	<b>-0.8%</b>

Source: *Puertos del Estado*.<sup>16</sup>

In 2023, the cargo handled by the Port Authority of Las Palmas was distributed among its five main ports: Arinaga, Arrecife, Las Palmas (La Luz), Puerto del Rosario, and Salinetas. Below is a detailed breakdown of the distribution, highlighting the leading and second-most significant ports in each category.

Overall, **Las Palmas (La Luz)** handled a total of **23,874,833 tons**, representing **85.7% of the total cargo** managed by the Port Authority of Las Palmas in 2023. This solidifies its position as the principal port in all categories, reflecting its strategic importance in the region. **Arrecife**, which processed **1,790,254 tons (6.4%)**, emerged as the second-most significant port in most categories, particularly for general cargo and fish, underscoring its complementary role in the overall port system.

- For **Dry Bulk Cargo**, the total volume reached **379,653 tons**. Most of this cargo, **134,320 tons (35.4%)**, was handled at **Las Palmas (La Luz)**, making it the leading port for this category. The second-largest contributor was **Arinaga**, with **114,131 tons (30.1%)**. The remaining traffic was split among Puerto del Rosario (**65,636 tons, 17.3%**), Arrecife (**64,460 tons, 17.0%**), and Salinetas (**1,106 tons, 0.3%**).
- In the **Liquid Bulk Cargo** category, a total of **6,904,940 tons** was distributed across the ports. **Las Palmas (La Luz)** handled the vast majority with **5,408,516 tons (78.3%)**, maintaining its position as the primary port. **Salinetas** followed as the second-largest port, processing **679,116 tons (9.8%)**. Other ports included Arrecife (**429,148 tons, 6.2%**), Puerto del Rosario (**360,987 tons, 5.2%**), and Arinaga (**27,173 tons, 0.4%**).
- For **General Cargo**, which includes **18,261,251 tons**, **Las Palmas (La Luz)** was overwhelmingly dominant, handling **16,051,467 tons (87.9%)**. **Arrecife** was the second-most important port, with **1,263,477 tons (6.9%)**, followed by Puerto del Rosario (**876,737 tons, 4.8%**) and Arinaga (**69,565 tons, 0.4%**). Salinetas handled a negligible volume (**5 tons**).
- In the small but significant category of **Fish**, a total of **721 tons** was managed. **Arrecife** led with **614 tons (85.2%)**, followed by **Las Palmas (La Luz)** with **88 tons (12.2%)**. Smaller contributions came from Arinaga (**14 tons, 1.9%**) and Puerto del Rosario (**5 tons, 0.7%**).

<sup>16</sup> Port traffic statistics. Available at the time of writing of the report at <https://www.puertos.es/datos/estadisticas/anuales>

- For **Supplies - Bunkering**, which includes **2,327,484 tons**, **Las Palmas (La Luz)** again dominated, managing **2,280,442 tons (98.0%)**. **Arrecife** followed with **32,555 tons (1.4%)**, with smaller contributions from Puerto del Rosario (**13,030 tons, 0.6%**) and Arinaga (**1,457 tons, 0.06%**).

Table 18. Port traffic distribution among different Ports (Tons). Year 2023- Las Palmas Port Authority

Type of Cargo	Arinaga	Arrecife	Las Palmas (La Luz)	Puerto del Rosario	Salinetas	Totals
Dry Bulk Cargo	114,131	64,460	134,320	65,636	1,106	379,653
Liquid Bulk Cargo	27,173	429,148	5,408,516	360,987	679,116	6,904,940
General Cargo	69,565	1,263,477	16,051,467	876,737	5	18,261,251
Fish	14	614	88	5	0	721
Supplies - Bunkering	1,457	32,555	2,280,442	13,030	0	2,327,484
<b>TOTAL</b>	<b>212,340</b>	<b>1,790,254</b>	<b>23,874,833</b>	<b>1,316,395</b>	<b>680,227</b>	<b>27,874,049</b>

Source: Puertos del Estado.<sup>16</sup>

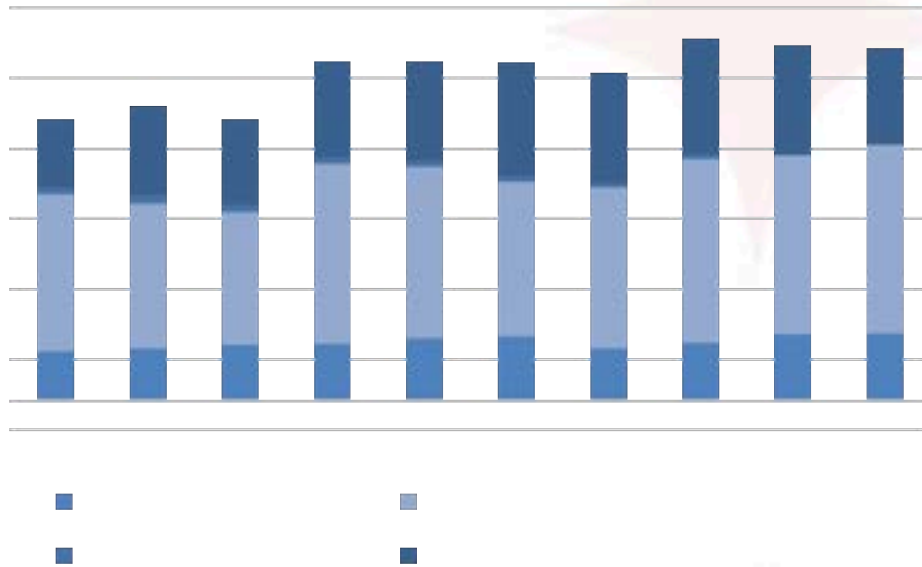
From 2014 to 2023, the traffic at the Port Authority of Las Palmas has demonstrated varied growth across different segments, with a notable dip during the COVID-19 pandemic in 2020, which disrupted global supply chains and trade flows. Despite this setback, the long-term trends indicate recovery and growth in most categories, albeit at different rates.

Overall, the **Total Cargo** handled by the port grew at a **CAGR of 2.72%** from 2014 to 2023. This growth underscores the port's ability to recover from the pandemic's impact, though the long-term growth rate has been moderated by the uneven performance of individual segments. The pandemic in 2020 marked a clear inflection point, disrupting historical trends, but recovery across most segments demonstrates the port's resilience and importance in regional trade.

- The **Liquid Bulk** segment experienced a **Compound Annual Growth Rate (CAGR) of 4.01%** over the analysed period, driven by steady increases in demand prior to 2020 and subsequent recovery after the pandemic-induced disruption. However, recent declines in 2022 and 2023 suggest volatility in this segment.
- **Dry Bulk**, the smallest category in volume, showed a **negative CAGR of -2.52%** over the same period. This category has struggled to maintain consistent growth, with volumes steadily decreasing since 2015. The pandemic further exacerbated this decline, reflecting its vulnerability to economic downturns.
- The **General Cargo** segment recorded a **CAGR of 3.54%**, highlighting consistent growth driven by increased trade activity in recent years. Although it was briefly impacted by the COVID-19 pandemic in 2020, it quickly recovered, reflecting the resilience of this category.

- **Containerized Cargo**, the largest segment, achieved a **CAGR of 2.02%**, solidifying its position as the primary contributor to the port's overall traffic. While this category also faced challenges during the pandemic, it rebounded strongly in subsequent years, indicating robust demand for containerized shipping.

Figure 31. Port traffic evolution 2014-2023 (Tons)- Las Palmas Port Authority



Source: Puertos del Estado.<sup>16</sup>

Table 19. Traffic evolution 2014-2023 (Tons)- Las Palmas Port Authority

Year	Liquid Bulk (tons)	Dry Bulk (tons)	General Cargo (tons)	Containerized Cargo (tons)	Total Cargo (tons)
2014	4,845,158	477,534	3,554,860	11,192,150	20,069,702
2015	6,385,970	483,910	3,777,855	10,333,697	20,981,432
2016	6,119,850	534,113	4,040,743	9,497,915	20,192,621
2017	6,849,513	559,599	4,126,042	12,806,963	24,342,117
2018	7,148,461	474,213	4,481,595	12,238,326	24,342,595
2019	8,070,276	453,301	4,661,611	10,984,192	24,169,380
2020	7,817,669	396,918	3,777,398	11,445,173	23,437,158
2021	8,256,892	423,729	4,187,948	13,060,685	25,929,254
2022	7,808,563	362,686	4,774,928	12,804,803	25,750,980
2023	6,904,940	379,653	4,859,790	13,401,461	25,545,844

Source: Puertos del Estado.<sup>16</sup>

From 2014 to 2023, the total container traffic at the Port Authority of Las Palmas, measured in TEUs (Twenty-foot Equivalent Units), increased from **977,541 TEUs** to **1,205,296 TEUs**,

reflecting a **CAGR of 2.35%**. Within this total, transshipment containers grew from **530,870 TEUs** in 2014 to **631,041 TEUs** in 2023, with a **CAGR of 1.94%** over the same period.

On average, transshipment containers represented approximately **50.2%** of the total container traffic across these years. While the proportion of transshipments has fluctuated, it has remained consistently significant, peaking at **55%** in 2021 and averaging around **52%** in 2023. This highlights the strategic role of the port as a critical transshipment hub in the region as well as its critical role in enabling import-export traffic to supply the Canary Islands and facilitating the export of locally produced goods.

Table 20. Traffic evolution 2014-2023 (TEUS)- Las Palmas Port Authority

Year	Total (TEUs)	Transshipment	% Transshipment
2014	977,541	530,870	54%
2015	901,101	437,666	49%
2016	945,534	409,696	43%
2017	1,183,327	615,841	52%
2018	1,140,545	583,735	51%
2019	1,006,853	447,412	44%
2020	1,033,486	535,757	52%
2021	1,176,501	641,757	55%
2022	1,164,111	576,912	50%
2023	1,205,296	631,041	52%

Source: Puertos del Estado.<sup>16</sup>

Figure 32. Port traffic evolution 2014-2023 (TEUS)- Las Palmas Port Authority



Source: Puertos del Estado.<sup>16</sup>

### Santa Cruz de Tenerife Port Authority

In 2023, the total traffic managed by the Port Authority of Santa Cruz de Tenerife reached **12,800,568 tons**, reflecting a robust increase of **9.8%** compared to the previous year.

- **Liquid Bulk** accounted for **4,136,791 tons**, representing approximately **32.3%** of the total traffic. This category experienced strong growth, increasing by **10.8%** compared to 2022, underscoring the rising demand for liquid commodities in the region.
- **Dry Bulk** recorded **376,356 tons**, making up about **2.9%** of the total traffic. It was the only category to experience a decline, dropping by **8.6%** from the previous year. This highlights a contraction in the segment, possibly due to changing demand patterns or operational adjustments.
- **Containerized Cargo** remained a critical segment, with a total of **4,329,741 tons**, which is **33.8%** of the overall traffic. This category showed remarkable growth of **11.9%** year-on-year, reflecting its key role in supporting the import and export activities of the Canary Islands.
- **General Cargo** reached **3,957,680 tons**, contributing approximately **30.9%** of the total traffic. It grew by **5.5%**, marking a steady and consistent increase, indicative of sustained economic and commercial activity in the region.

Table 21. Santa Cruz de Tenerife Port Authority- General Movement of Goods (Tons). Year 2021-2023

Type of Cargo	2021 (Tons)	2022 (Tons)	2023 (Tons)	Variation % (23/22)
Liquid Bulk	3,035,070	3,690,469	4,136,791	10.8%
Dry Bulk	449,462	408,558	376,356	-8.6%
Containerized Cargo	3,584,624	3,813,306	4,329,741	11.9%
General Cargo	3,611,406	3,740,640	3,957,680	5.5%
<b>Total</b>	<b>10,680,562</b>	<b>11,652,973</b>	<b>12,800,568</b>	<b>19.6%</b>

Source: Puertos del Estado.<sup>17</sup>

Overall, the **Total Cargo** handled by the Port Authority of Santa Cruz de Tenerife grew at a **CAGR of 0.99%** from 2014 to 2023. While the pandemic caused a significant dip in 2020, recovery

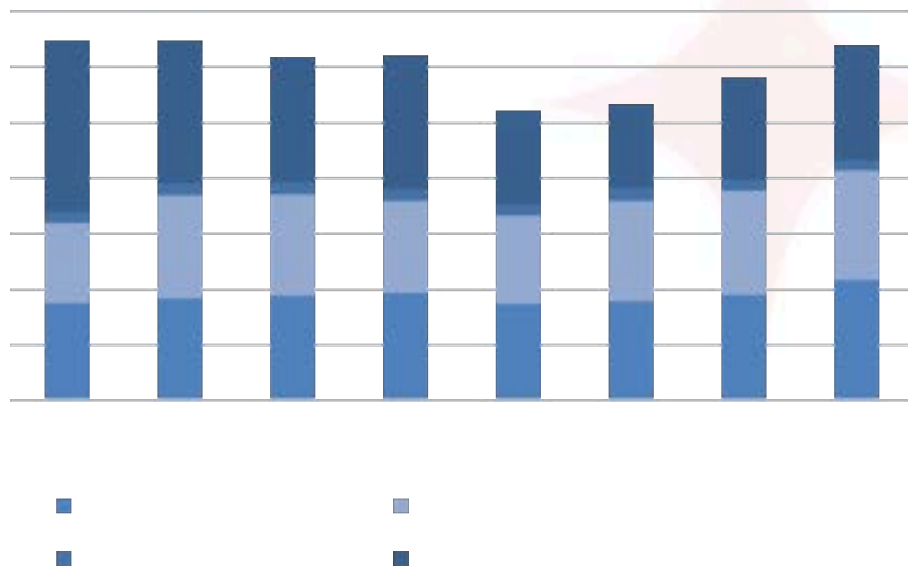
<sup>17</sup> Port traffic statistics. Available at the time of writing of the report at <https://www.puertos.es/datos/estadisticas/anuales>



trends have been evident in most segments, with notable contributions from general cargo and containerized traffic.

- The **Dry Bulk** segment experienced a **CAGR of -3.51%** over the analysed period, reflecting a steady decline in volumes. This segment has struggled to recover its previous levels, with significant drops during and after the pandemic, demonstrating its vulnerability to changing economic conditions.
- **Liquid Bulk**, while smaller in overall volume, recorded a **CAGR of -1.65%** from 2014 to 2023. The segment saw fluctuations over the years, with consistent recovery from 2021 to 2022 before declining slightly in 2023. Despite these variations, the segment remains a vital contributor to the port's operations.
- The **General Cargo** segment recorded a **CAGR of 4.06%**, reflecting steady growth driven by increased trade activity in the region. While the segment was briefly affected by the COVID-19 pandemic, it demonstrated resilience, recovering quickly and surpassing pre-pandemic levels by 2023.
- **Containerized Cargo**, one of the largest contributors to the port's traffic, achieved a **CAGR of 5.02%**, highlighting its growing importance. The category faced challenges during the pandemic but has since rebounded strongly, reflecting robust demand for containerized shipping in the Canary Islands.

Figure 33. Port traffic evolution 2014-2023 (Tons)- Santa Cruz de Tenerife Port Authority



Source: Puertos del Estado.<sup>16</sup>

Table 22. Traffic evolution 2014-2023 (Tons)- Santa Cruz de Tenerife Port Authority

Year	Liquid Bulk (tons)	Dry Bulk (tons)	General Cargo (tons)	Containerized Cargo (tons)	Total Cargo (tons)
2014	5,735,976	437,558	3,023,287	2,483,855	<b>11,680,676</b>
2015	5,732,686	406,749	3,272,898	2,628,614	<b>12,040,947</b>
2016	6,157,861	414,998	3,514,394	2,870,638	<b>12,957,891</b>
2017	5,137,879	413,553	3,691,184	3,699,948	<b>12,942,564</b>
2018	4,501,836	446,926	3,779,661	3,631,762	<b>12,360,185</b>
2019	4,811,480	421,960	3,895,454	3,312,267	<b>12,441,161</b>
2020	3,397,370	378,025	3,468,485	3,202,653	<b>10,446,533</b>
2021	3,035,070	449,462	3,584,624	3,611,406	<b>10,680,562</b>
2022	3,690,469	408,558	3,813,306	3,740,640	<b>11,652,973</b>
2023	4,136,791	376,356	4,329,741	3,957,680	<b>12,800,568</b>

Source: Puertos del Estado.<sup>16</sup>

In 2023, the cargo handled by the Port Authority of Santa Cruz de Tenerife was distributed across its five main ports: La Estaca del Hierro, Los Cristianos, San Sebastián de La Gomera, Santa Cruz de La Palma, and Santa Cruz de Tenerife. Below is a detailed breakdown of the distribution, highlighting the leading and second-most significant ports in each category.

Overall, **Santa Cruz de Tenerife** handled the majority of the total cargo with **11,539,022 tons**, representing **85.2%** of the total **13,539,300 tons** managed by the Port Authority in 2023. This cements its role as the principal port in the region, reflecting its strategic importance in cargo handling. **Santa Cruz de La Palma** followed as the second-most significant port, managing **949,392 tons (7.0%)**, contributing significantly to general and liquid bulk cargo operations.

- For **Dry Bulk Cargo**, the total volume reached **376,356 tons**, with **Santa Cruz de Tenerife** handling **353,916 tons (94.0%)**, making it the leading port for this category. The remaining **22,440 tons (6.0%)** were handled by **Santa Cruz de La Palma**, while the other ports had no activity in this category.
- In the **Liquid Bulk Cargo** category, a total of **4,136,791 tons** was managed. **Santa Cruz de Tenerife** processed the vast majority with **3,996,422 tons (96.6%)**, maintaining its dominance in this segment. **Santa Cruz de La Palma** followed with **106,471 tons (2.6%)**, and smaller contributions came from La Estaca del Hierro (**12,663 tons, 0.3%**) and San Sebastián de La Gomera (**21,235 tons, 0.5%**).
- For **General Cargo**, which totalled **8,287,421 tons**, **Santa Cruz de Tenerife** was overwhelmingly dominant, handling **6,522,054 tons (78.7%)**. **Santa Cruz de La Palma** was the second-most significant port, managing **797,281 tons (9.6%)**, followed by Los Cristianos with **670,854 tons (8.1%)**, and San Sebastián de La Gomera with **218,683 tons (2.6%)**. La Estaca del Hierro contributed **78,549 tons (0.9%)**.

- In the small but significant category of **Fish**, a total of **3,048 tons** was distributed. **Santa Cruz de Tenerife** led this category with **2,128 tons (69.8%)**, followed by Los Cristianos with **861 tons (28.2%)**, and Santa Cruz de La Palma with **59 tons (1.9%)**.
- For **Supplies & Bunkering**, a total of **734,045 tons** was managed, with **Santa Cruz de Tenerife** dominating the category at **664,502 tons (90.5%)**. **Los Cristianos** followed with **39,710 tons (5.4%)**, and smaller contributions came from Santa Cruz de La Palma (**23,141 tons, 3.1%**) and San Sebastián de La Gomera (**5,155 tons, 0.7%**). La Estaca del Hierro added a minimal amount of **1,537 tons (0.2%)**.
- Additionally, **Inner Traffic (inraport)** accounted for **1,639 tons**, all managed at **Los Cristianos**.

Table 23. Port traffic distribution among different Ports (Tons). Year 2023- Santa Cruz de Tenerife Port Authority

Type of Cargo	La Estaca del Hierro	Los Cristianos	San Sebastián de la Gomera	Santa Cruz de La Palma	Santa Cruz de Tenerife	Totals
Dry Bulk Cargo	0	0	0	22,440	353,916	<b>376,356</b>
Liquid Bulk Cargo	12,663	0	21,235	106,471	3,996,422	<b>4,136,791</b>
General Cargo	78,549	670,854	218,683	797,281	6,522,054	<b>8,287,421</b>
Fish	0	861	0	59	2,128	<b>3,048</b>
Supplies & Bunkering	1,537	39,710	5,155	23,141	664,502	<b>734,045</b>
Inner Traffic (inraport)	0	1,639	0	0	0	<b>1,639</b>
<b>TOTAL</b>	<b>92,749</b>	<b>713,064</b>	<b>245,073</b>	<b>949,392</b>	<b>11,539,022</b>	<b>13,539,300</b>

Source: Puertos del Estado.<sup>16</sup>

From 2014 to 2023, the total container traffic at the Port Authority of Santa Cruz de Tenerife, measured in TEUs (Twenty-foot Equivalent Units), increased from **325,708 TEUs** to **496,691 TEUs**, reflecting a **CAGR of 4.66%**. Within this total, transshipment containers grew significantly from **3,037 TEUs in 2014** to **73,527 TEUs in 2023**, achieving an impressive **CAGR of 43.54%**, highlighting the growing importance of this segment over the years.

On average, transshipment containers accounted for approximately **8.4%** of the total container traffic from 2014 to 2023. This proportion has steadily increased, peaking at **20.4% in 2018**, indicating a shift in the port's operations toward becoming a more active player in transshipment activities. This trend reflects the strategic positioning of the port in the Atlantic trade routes, catering to transshipment needs while maintaining its critical role in direct imports and exports.

The consistent growth in total container traffic and the remarkable rise in transshipment volumes underscore the evolving role of the Port Authority of Santa Cruz de Tenerife. The port continues to support the Canary Islands' economy by facilitating the import of goods to meet local demand and enabling exports of locally produced products. Additionally, the increased

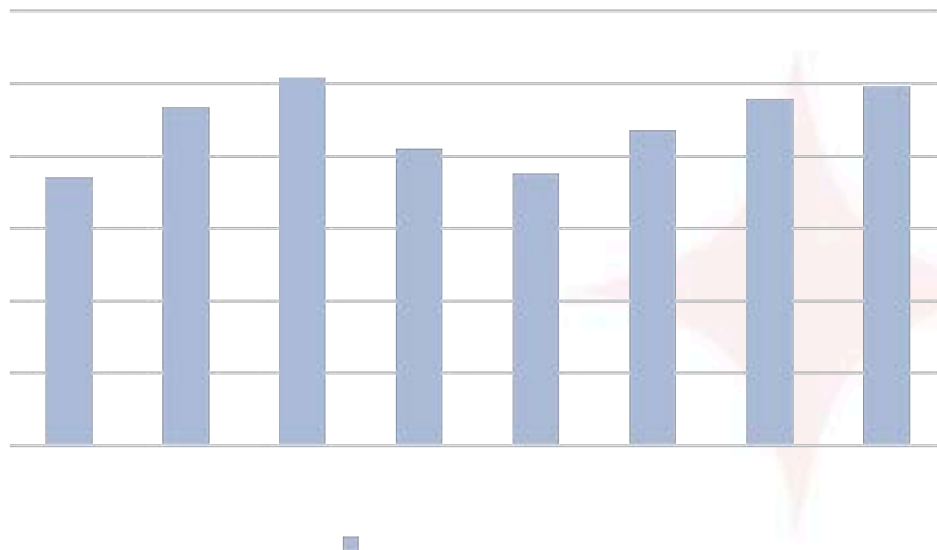
share of transshipment traffic highlights the port's expanding reach and competitiveness as a logistics hub in the region.

Table 24. Traffic evolution 2014-2023 (TEUs)- Santa Cruz de Tenerife Port Authority

Year	Total (TEUs)	Transshipment	% Transshipment
2014	325,708	3,037	0.9%
2015	345,457	2,275	0.7%
2016	370,645	2,869	0.8%
2017	467,144	65,237	14.0%
2018	508,891	103,608	20.4%
2019	410,968	12,530	3.0%
2020	376,762	25,429	6.7%
2021	435,909	41,413	9.5%
2022	479,698	66,019	13.8%
2023	496,691	73,527	14.8%

Source: Puertos del Estado.<sup>16</sup>

Figure 34. Port traffic evolution 2014-2023 (TEUs)- Santa Cruz de Tenerife Port Authority



Source: Puertos del Estado.<sup>16</sup>

When comparing the transshipment container traffic between the Port Authority of Las Palmas and the Port Authority of Santa Cruz de Tenerife, the dominance of Las Palmas as a transshipment hub becomes evident, despite recent growth in Tenerife's operations.

From 2014 to 2023, the transshipment traffic in Las Palmas grew from **530,870 TEUs** to **631,041 TEUs**, reflecting a **CAGR of 1.94%**. Throughout this period, transshipment containers consistently accounted for over **50%** of Las Palmas' total container traffic, highlighting the port's

strategic importance as a regional hub for Atlantic shipping routes. This stability and high volume have positioned Las Palmas as a leading transshipment hub, serving international shipping lines with its superior infrastructure, connectivity, and operational capacity.

In contrast, transshipment traffic at Tenerife saw a more volatile trajectory. It increased significantly from **3,037 TEUs in 2014** to **73,527 TEUs in 2023**, achieving a remarkable **CAGR of 43.54%**. However, despite this impressive growth, transshipment volumes in Tenerife remain a small fraction of Las Palmas' figures, representing only **14.8% of Tenerife's total container traffic** in 2023. While Tenerife has made efforts to establish itself as a transshipment hub, its peak of **103,608 TEUs in 2018** has not been sustained, with volumes falling significantly in subsequent years and only partially recovering by 2023.

### Portos dos Açores

In 2023, the total cargo traffic handled by **Portos dos Açores, S.A.** reached **2,573,524 tons**, continuing a steady increase since 2014. Over the period from 2014 to 2023, the Compound Annual Growth Rate ("CAGR") for total cargo was approximately **2.3%**, reflecting consistent growth despite some fluctuations in certain years.

Dry bulk cargo totalled **452,751 tons** in 2023, making up **17.59%** of the total traffic. This category has shown a modest CAGR of approximately **0.28%** from 2014 to 2023, indicating stability with slight growth over the years.



In 2023, liquid bulk cargo reached **513,992 tons**, accounting for **19.97%** of the total. Over the nine-year period, liquid bulk achieved a **CAGR of 1.92%**, with steady increases in most years and a slight decline in 2020.

General cargo reached **180,850 tons** in 2023, contributing **7.03%** of the total traffic. This category grew at a **CAGR of 3.1%** from 2014 to 2023, reflecting consistent annual growth and increasing importance within the cargo mix.

Containerized cargo, the largest category, totalled **1,425,931 tons** in 2023, representing **55.39%** of the total traffic. Over the analysed period, it grew at a **CAGR of 2.87%**, demonstrating robust and consistent growth, although there was a slight decline in 2023 compared to the previous year.

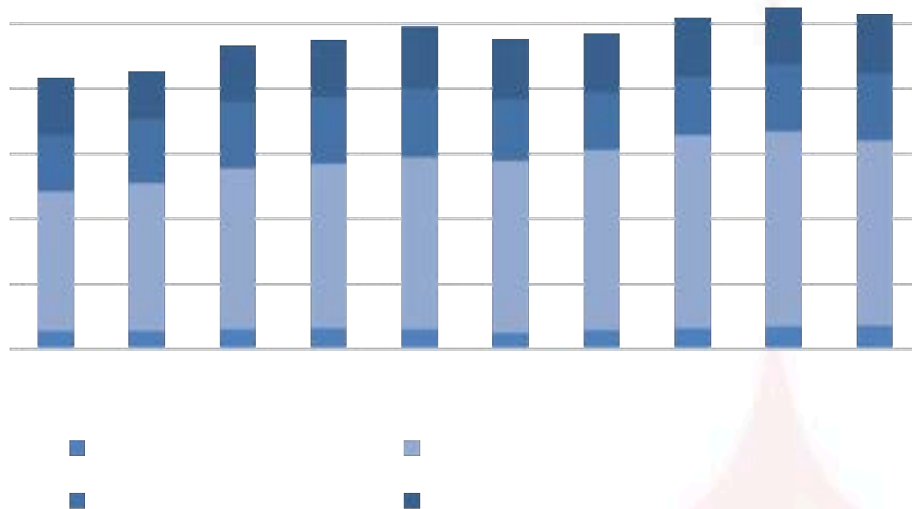
The data highlights a positive long-term trend in total cargo growth across the Azorean port system. While containerized cargo continues to dominate, general cargo and liquid bulk are growing steadily, contributing to the diversification and resilience of the port operations. Dry bulk has shown stable volumes with minimal growth, reflecting its established role in the region's economy.

Table 25. Portos dos Açores, S.A. - General Movement of Goods (Tons). Year 2021-2023

Type of Cargo	2021 (Tons)	2022 (Tons)	2023 (Tons)	Variation % (23/22)
Liquid Bulk	447,369	522,298	513,992	-1.59%
Dry Bulk	454,070	430,131	452,751	5.26%
Containerized Cargo	1,478,139	1,496,299	1,425,931	-4.70%
General Cargo	164,983	177,352	180,850	1.97%
<b>Total</b>	<b>2,544,561</b>	<b>2,626,080</b>	<b>2,573,524</b>	<b>-2.00%</b>

Source: Portos dos Açores, S.A.<sup>18</sup>

Figure 35 Port traffic evolution 2014-2023 (Tons)- Portos dos Açores.



Source: Own elaboration with several annual reports Portos dos Açores, S.A

The port traffic in the Azores in 2023 was distributed among several key ports, with Ponta Delgada on São Miguel Island handling the largest share. Ponta Delgada processed **1,623,101 tons**, representing **63.08%** of the total traffic, highlighting its role as the central hub for maritime activity in the archipelago. This was followed by Praia da Vitória on Terceira Island, which managed **541,574 tons**, accounting for **21.04%** of the total, despite experiencing a **6.70% decline** compared to 2022.

The third-largest port was Horta on Faial Island, which handled **117,883 tons**, equivalent to **4.58%** of the total, showing a **7.96% decrease** year-over-year. Vila do Porto on Santa Maria Island processed **47,663 tons**, contributing **1.85%** to the overall traffic, with a slight increase of **1.69%** from 2022. Lajes on Flores Island managed **34,836 tons**, accounting for **1.35%**, though it saw an **8.93% decline**.

<sup>18</sup> Portos dos Açores, S.A. Relatório & Contas 2023. Available at the time of writing of the report at <https://portosdosacores.pt/wp-content/uploads/2024/04/Relatorio-e-Contas-2023.pdf>



Other ports handled smaller shares of the total traffic. Velas on São Jorge Island recorded **66,553 tons**, or **2.59%**, showing an **8.36% drop** from the previous year. São Roque on Pico Island handled **100,979 tons**, contributing **3.92%**, with a **6.61% decline**. Madalena, also on Pico Island, processed just **3 tons**, representing a negligible share, with a dramatic **98.89% decrease**. Casa on Corvo Island saw a significant increase of **49.93%**, handling **9,854 tons**, though it accounted for only **0.38%** of the total traffic.

Table 26. Portos dos Açores, S.A. – Breakdown in ports (Tons). Year 2023

Port	Island	2021 (Tons)	2022 (Tons)	2023 (Tons)	Variation % (23/22)
Vila do Porto	Santa Maria	41,755	46,871	47,663	1.69%
Ponta Delgada	São Miguel	1,553,841	1,611,305	1,623,101	0.73%
Praia da Vitória	Terceira	601,324	580,477	541,574	-6.70%
Praia da Graciosa	Graciosa	28,641	28,799	26,551	-7.81%
Velas	São Jorge	71,999	72,627	66,553	-8.36%
Calheta	São Jorge	5,656	4,674	4,528	-3.13%
São Roque	Pico	101,79	108,128	100,979	-6.61%
Madalena	Pico	863	298	3	-98.89%
Horta	Faial	104,213	128,075	117,883	-7.96%
Lajes	Flores	31,489	38,253	34,836	-8.93%
Casa	Corvo	2,502	6,572	9,854	49.93%
<b>Total</b>	-	<b>2,544,073</b>	<b>2,626,079</b>	<b>2,573,524</b>	<b>-2.00%</b>

Source: Portos dos Açores, S.A.<sup>18</sup>

In 2023, the total movement of containers across the ports of the Azores amounted to **123,200 TEUs**, reflecting a slight decline of **0.82%** compared to the previous year. Over the past three years, container traffic has remained relatively stable, with minor fluctuations. In 2021, the total TEUs were **123,667**, followed by **124,222** in 2022, indicating a small peak before the marginal drop in 2023.

The **Port of Ponta Delgada**, located on São Miguel Island, continues to dominate container traffic, handling **75,754 TEUs** in 2023. This represents an increase of **1.78%** compared to 2022 and accounts for an impressive **61.49%** of the total container movement in the region. The second-largest contributor is **Praia da Vitória** on Terceira Island, which processed **25,338 TEUs**, accounting for **20.57%** of the total. However, this port experienced a decline of **5.46%** from the previous year. **Horta**, located on Faial Island, ranks third with **6,659 TEUs**, representing **5.41%** of the total, and saw a growth of **2.45%** compared to 2022.

The remaining ports collectively contributed to a smaller share of container traffic, with some experiencing declines, such as Vila do Porto on Santa Maria Island (-11.59%) and Velas on São Jorge Island (-4.86%), while others, like Casa on Corvo Island, saw modest increases (+1.79%). The data highlights the central role of Ponta Delgada in sustaining regional container traffic, supported by Praia da Vitória and Horta, while other ports serve more localized or specialized functions.

Table 27. Portos dos Açores, S.A. – Breakdown in ports (TEUs). Year 2023

Port	Island	2021 (TEUs)	2022 (TEUs)	2023 (TEUs)	Variation % (23/22)
Vila do Porto	Santa Maria	1,911	2,398	2,120	-11.59%
Ponta Delgada	São Miguel	74,837	74,427	75,754	1.78%
Praia da Vitória	Terceira	28,086	26,800	25,338	-5.46%
Praia da Graciosa	Graciosa	1,335	1,281	1,211	-5.46%
Velas	São Jorge	3,790	3,696	3,517	-4.86%
São Roque	Pico	5,523	5,990	5,632	-5.98%
Horta	Faial	5,981	6,499	6,659	2.45%
Lajes das Flores	Flores	1,985	2,405	2,231	-7.23%
Casa	Corvo	219	726	739	1.79%
<b>Total</b>	-	<b>123,667</b>	<b>124,222</b>	<b>123,200</b>	<b>-0.82%</b>

Source: Portos dos Açores, S.A.<sup>18</sup>

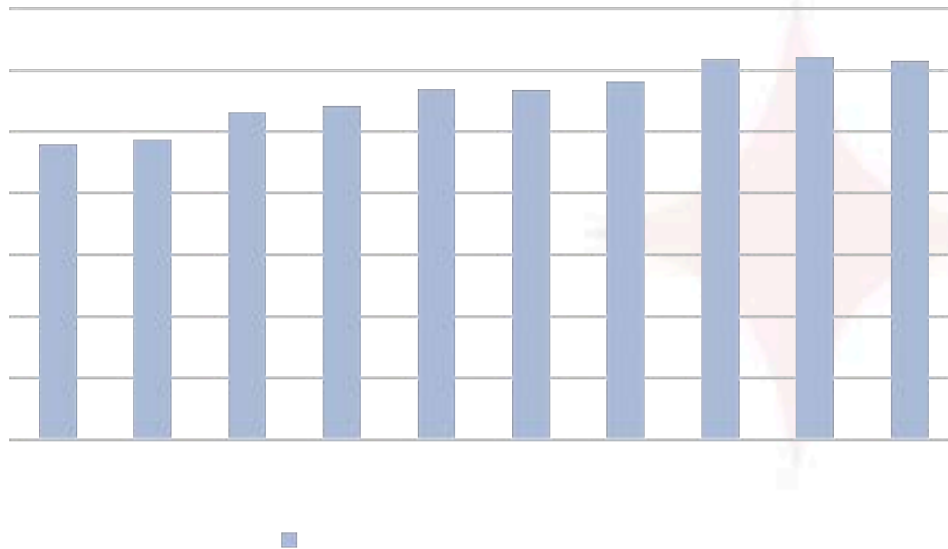
**Container traffic in the Azorean ports**, measured in TEUs, has shown steady growth over the past decade with minor fluctuations. In 2013, the total volume of containers handled was 95,969 TEUs, increasing to a peak of 124,222 TEUs in 2022 before slightly declining to 123,200 TEUs in 2023. Over the 10-year period from 2013 to 2023, container traffic experienced a **CAGR of approximately 2.5%**, highlighting consistent long-term growth.

Table 28. Container Movements 2013 – 2023 Portos dos Açores (TEUs).

Year	Total Containers (TEUs)
2013	95,969
2015	97,535
2016	106,317
2017	108,488
2018	113,944
2019	113,752
2020	116,303
2021	123,667
2022	124,222
2023	123,200

Source: Own elaboration with several annual reports Portos dos Açores, S.A

Figure 36. Port traffic evolution (TEUS) 2014-2023- Portos dos Açores



Source: Own elaboration with several annual reports Portos dos Açores, S.A

#### Administração dos Portos da Região Autónoma da Madeira, S.A.

The following table provides an overview of the total volume of goods handled by the ports under the management of **APRAM** for the year 2023. Collectively, these ports processed a total of **1,612,323 tons of goods** across all categories. The **Port of Caniçal** is highlighted as the primary hub, managing **919,291 tons**, which accounts for approximately **57% of the total volume** handled by APRAM.

In terms of specific cargo types, **containerized cargo** accounts for **777,079 tons**, making up **48% of the total volume**. **Dry bulk cargo** represents **416,097 tons**, which is **26% of the total**, while **liquid bulk cargo** amounts to **368,748 tons**, or **23% of the total volume**. Lastly, **general cargo** accounts for **50,399 tons**, contributing **3%** to the overall volume. These figures highlight the dominance of containerized and bulk cargo in the region's port activity. The detailed breakdown of this data is shown in the table below.

Table 29. APRAM - General Movement of Goods (Tons). Year 2023

APRAM - General Movement of Goods (Tons). Year 2023							
Types	Porto do Funchal	Porto do Porto Santo	Porto do Caniçal	Logistics Center of Cancela	Socorridos	Terminal Inertes	Totals
Dry Bulk Cargo	0	4,100	107,754	0	104,535	199,708	416,097
Liquid Bulk Cargo	0	12,208	2,993	353,547	0	0	368,748
General Cargo	58	401	49,040	0	0	0	50,399
Containerized Cargo	4,010	14,465	758,604	0	0	0	777,079
<b>TOTAL</b>	<b>4,068</b>	<b>31,174</b>	<b>919,291</b>	<b>353,547</b>	<b>104,535</b>	<b>199,708</b>	<b>1,612,323</b>

Source: APRAM<sup>19</sup>.

The **total cargo handled** by the APRAM reached 1,612,323 tons in 2023, representing a strong recovery compared to earlier years. Over the period from 2014 to 2023, the total cargo volume experienced a Compound Annual Growth Rate (**CAGR**) of **2.59%**, indicating moderate but steady growth despite some fluctuations during the decade. This growth highlights the resilience of the port system in recovering from disruptions, particularly those caused by the COVID-19 pandemic in 2020.

In 2023, **dry bulk cargo** accounted for 416,097 tons, with a **CAGR of 0.71%** from 2014 to 2023. This category showed variability throughout the period, with significant dips in 2016 and 2020 but a strong recovery in the later years, particularly in 2023. Similarly, **liquid bulk cargo** amounted to 368,748 tons in 2023, achieving a **CAGR of 1.92%**. This category also displayed a mixed trend, reflecting fluctuations driven by external market dynamics.

**General cargo** showed the most significant growth over the period, with 50,399 tons handled in 2023 and a CAGR of **9.15%**. Although its absolute volumes are smaller compared to other categories, this category consistently grew across most years, demonstrating the increasing importance of diverse cargo types. **Containerized cargo**, the largest contributor to overall volumes, reached 777,079 tons in 2023, with a **CAGR of 3.78%**. This steady growth underscores the critical role of containerized shipments in sustaining the region's trade.

The COVID-19 pandemic had a noticeable impact on cargo volumes in 2020, particularly in liquid and containerized cargo. However, the recovery in subsequent years, culminating in record volumes in 2023, reflects the adaptability and resilience of the port system. The mixed trends observed across categories indicate that external factors, including economic conditions and global disruptions, played a significant role in shaping cargo movements during the analysed period.

<sup>19</sup> APRAM Statistical Report 2023. Available at the time of writing of the report at <https://apram.pt/storage/440/Ano-2023.pdf>

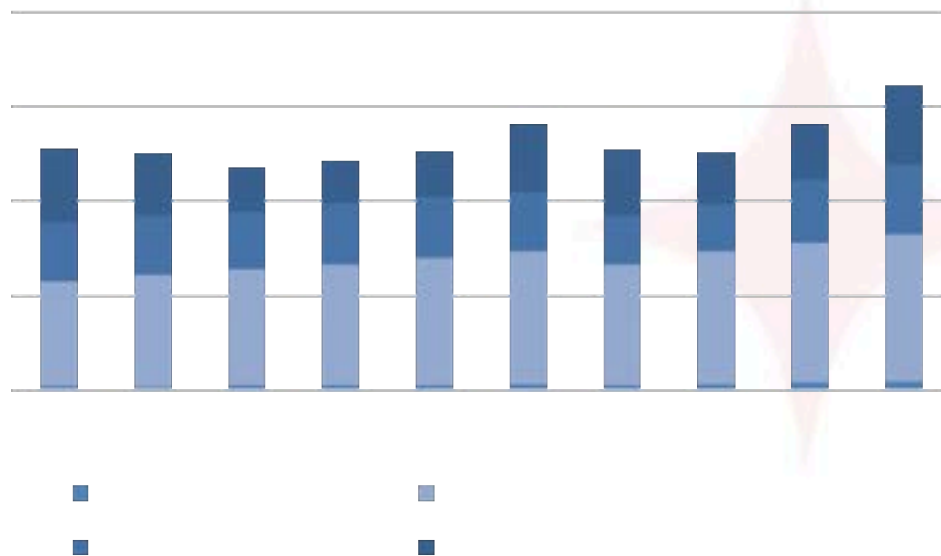
Table 30. GPMM (Madeira) - General Movement Evolution of Goods (Tons). Year 2014-2023

Year	Dry Bulk (tons)	Liquid Bulk (tons)	General Cargo (tons)	Containerized Cargo (tons)	Total Cargo (tons)
2014	390,561	310,749	22,919	556,621	1,280,850
2015	330,146	312,779	21,503	591,244	1,255,672
2016	232,786	306,009	30,362	611,768	1,180,925
2017	222,479	326,289	28,238	638,179	1,215,185
2018	243,710	322,649	30,578	670,653	1,267,590
2019	355,364	318,464	34,708	699,744	1,408,279
2020	350,370	259,138	29,803	634,915	1,274,225
2021	278,123	249,055	34,714	700,984	1,262,876
2022	292,301	332,011	43,495	740,084	1,407,891
2023	416,097	368,748	50,399	777,079	1,612,323

Source: APRAM<sup>19</sup>.

The following figure shows the temporal evolution in recent years, with the distribution in different categories of traffic, denoting a decrease in 2015 and after a recovery, a relevant drop in 2020, coinciding with COVID and in line with those registered worldwide.

Figure 37. Port traffic evolution 2014-2023- APRAM

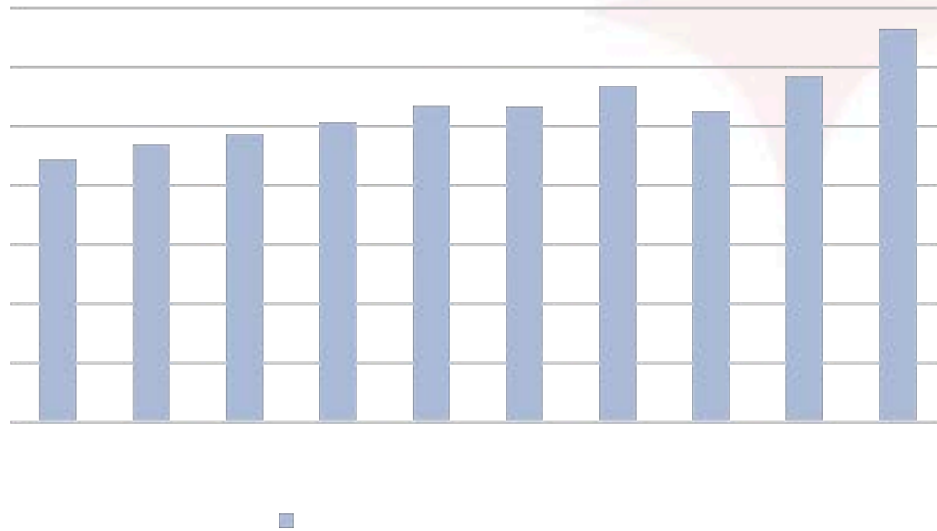


Source: APRAM<sup>19</sup>.

Next graph illustrates the evolution of container traffic (measured in TEUs, in thousands) managed by APRAM from 2013 to 2022. Over this period, container movement showed a steady upward trend, starting at 89,000 TEUs in 2013 and reaching **133,000 TEUs in 2022** (unavailable data from 2023). This represents a significant growth in containerized cargo volumes handled by the ports of Madeira.

The **CAGR is approximately 4.5%**, reflecting consistent increases in container throughput. Notable milestones include surpassing the 100,000 TEU mark in 2016 and maintaining robust growth despite external challenges such as the COVID-19 pandemic in 2020, where a slight dip to 105,000 TEUs was observed. The recovery in 2021 and the record volume achieved in 2022 underline the resilience and growth potential of APRAM's port operations.

Figure 38. Port traffic (TEUS) - Administração dos Portos da Região Autónoma da Madeira, S.A. ("APRAM")



Source: APRAM<sup>19</sup>.

### Grand Port Maritime de la Martinique

In 2023, total traffic at the Grand Port Maritime de la Martinique reached **3,313,111 tons**, distributed across four main categories.

Dry bulk accounted for 352,097 tons, representing 10.63% of the total traffic. While this is the smallest category, it demonstrated moderate growth over the period with a CAGR of 7.13%, showing a steady but limited contribution to the port's total traffic.

Liquid bulk was the dominant category in 2023, with 1,288,184 tons, representing 38.88% of the total. Despite its significant share, liquid bulk experienced a negative CAGR of -2.07%, reflecting a decline from earlier levels and a partial recovery in recent years.

General cargo reached 577,141 tons, accounting for 17.42% of the total traffic. It exhibited a CAGR of 3.34%, with consistent growth throughout the period, positioning it as a steadily growing segment of the port's operations.

Containerized cargo totalled 1,095,689 tons, making up 33.06% of the traffic in 2023. This category showed a CAGR of 1.73%, reflecting steady growth and maintaining its status as the second-largest contributor to overall traffic.



Table 31. GPMM - General Movement Evolution of Goods (Tons). Year 2014-2023

Year	Dry Bulk (tons)	Liquid Bulk (tons)	General Cargo (tons)	Containerized Cargo (tons)	Total Cargo (tons)
2016	220,151	1,483,522	457,932	971,510	3,133,115
2017	238,974	1,196,691	494,345	1,065,512	2,995,522
2018	258,046	1,091,458	531,378	1,179,834	3,060,716
2019	384,982	1,111,059	544,945	1,171,347	3,212,333
2020	337,053	876,992	496,393	989,194	2,699,632
2021	382,621	848,791	513,420	1,019,496	2,764,328
2022	353,137	986,847	571,863	1,085,941	2,997,788
2023	352,097	1,288,184	577,141	1,095,689	3,313,111

Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

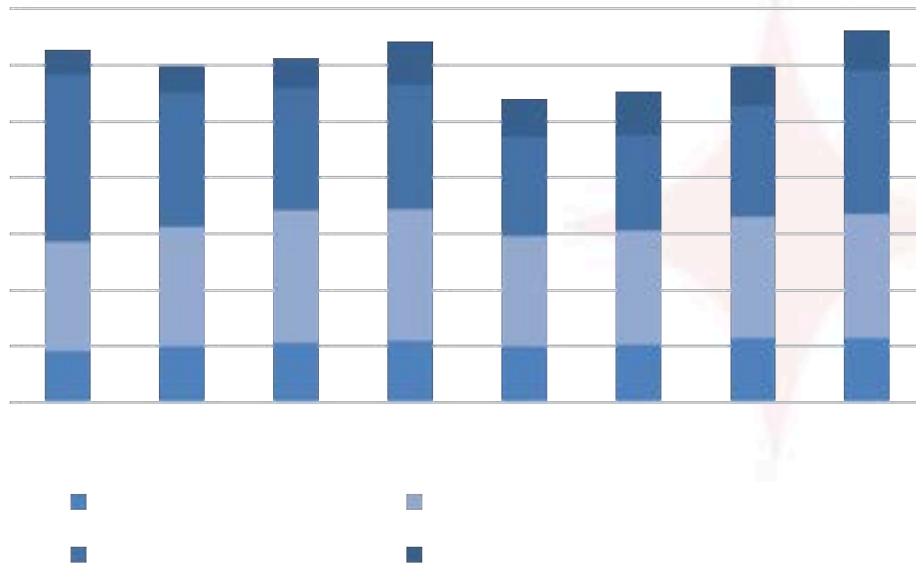
The graph illustrates the evolution of port traffic at the Grand Port Maritime de la Martinique from 2016 to 2023, segmented by cargo categories in thousand tons. After a decline in 2020, due to the pandemic, traffic recovered steadily. This represents a **CAGR** of approximately **0.8%** from 2016 to 2023, reflecting the impact of COVID and the moderate growth over the period in comparison with other ports of the region.

The following graph illustrates the evolution of container traffic (measured in TEUs, in thousands) managed by the Grand Port Maritime de la Martinique from 2014 to 2021. Over this period, container movement showed a fluctuating yet generally positive trend, starting at **153,453 TEUs** in 2014 and peaking at **192,135 TEUs** in 2020 before slightly declining to **187,000 TEUs** in 2021.

The CAGR for the period is approximately **2.9%**, indicating moderate but steady growth in container throughput. Notable milestones include surpassing the **170,000 TEU mark in 2017** and achieving a record volume in 2020 despite the challenges posed by the COVID-19 pandemic. The slight decline in 2021 suggests stabilization, while the overall growth trajectory highlights the port's role in handling containerized trade efficiently.

<sup>20</sup> Data available at the time of writing the report at: <https://www.martinique.port.fr/statistiques.aspx>

Figure 39. Port traffic evolution 2016-2023- GPMM (Martinique)



Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

The following graph illustrates the evolution of container traffic (measured in TEUs, in thousands) managed by the GPMM from 2014 to 2021. Over this period, container movement showed a fluctuating yet generally positive trend, starting at 153,453 TEUs in 2016 and peaking at 192,135 TEUs in 2022 before slightly declining to 187,252 TEUs in 2023.

The CAGR for the period is approximately 2.9%, indicating moderate but steady growth in container throughput. Notable milestones include achieving a record volume in 2022 despite the challenges posed by the COVID-19 pandemic.

Figure 40. Port traffic (TEUS) - GPMM (Martinique)



Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

### 9.3.2 Cruise Sector

The cruise sector plays a vital role in the tourism landscape of Macaronesia, serving as a key driver of economic activity and regional connectivity. This industry not only attracts international visitors to coastal destinations but also fosters synergies with other segments of the blue economy, such as marine research (facilitating data collection and collaboration with scientific institutions), renewable ocean energy (leveraging cruise operations to support the development of clean energy infrastructure), and maritime transportation (enhancing port efficiency and connectivity for broader trade and mobility).

By integrating cruise tourism with broader economic strategies, Macaronesia can capitalize on its unique maritime heritage and biodiversity, creating opportunities for innovation, job creation, and environmental stewardship. Such collaboration enhances the value chain, positioning the region as a leader in sustainable and diversified ocean-based development.

Cruise passengers typically participate in a variety of excursions designed to enhance their experience at each destination. These activities range from cultural visits to outdoor adventures, allowing travellers to explore the richness of each port of call. Below are some common types of excursions:

- **City tours and historical landmarks:** Passengers often explore major cities and iconic sites such as museums, cathedrals, and historic squares. These excursions provide an overview of local culture and history.

- **Culinary and wine experiences:** Many cruise travellers enjoy tasting local wines and regional dishes. This may include visits to local wineries, where they learn about wine production and sample native varieties.
- **Adventure and nature activities:** For nature enthusiasts, excursions such as hiking, snorkelling, scuba diving, or kayaking are popular options, allowing them to discover natural landscapes and local wildlife.
- **Local shopping and handicrafts:** Some tours focus on local markets and artisan shops, where tourists can purchase typical products and unique souvenirs.
- **Cultural and folkloric performances:** These excursions include traditional music, dance, and theatre performances, offering an immersive experience of the region's artistic expressions.
- **Eco-friendly and sustainable excursions:** With the growing interest in responsible tourism, there are tours that promote environmental conservation and support local communities, such as visits to nature reserves or conservation projects.

These activities provide cruise passengers with enriching and diverse experiences at each destination, catering to different interests and levels of activity.

Macaronesia, with its stunning archipelagos and diverse maritime heritage, has become a prime destination for cruise tourism, offering a variety of ports that cater to different traveller interests.

The Canary Islands feature top-notch ports in Tenerife (Santa Cruz de Tenerife), Gran Canaria (Las Palmas), Lanzarote (Arrecife), Fuerteventura (Puerto del Rosario), La Palma (Santa Cruz de La Palma), and La Gomera (San Sebastián de La Gomera), where visitors can explore volcanic landscapes, pristine beaches, lush forests, and vibrant local culture.

Madeira boasts Funchal as its primary port, a gateway to lush mountains, botanical gardens, and renowned wine traditions. The Azores provide a nature-focused experience, with ports in Ponta Delgada (São Miguel), Horta (Faial), Angra do Heroísmo (Terceira), and Praia da Vitória (Terceira) offering access to volcanic craters, geothermal springs, and world-class whale watching.

Caribbean cruises offer a wealth of exciting and varied activities, both at sea and on land. With Shore Side Activities cruisers can enjoy scuba diving & snorkeling, catamaran adventures, surfing, jet-skiing.... Land activities can cover exploring ancient ruins as caribbean remnants and bustling colonial towns, rainforest hikes, beach relaxation, etc.

Cape Verde continues to grow as a cruise destination with key ports in Mindelo (São Vicente), Praia (Santiago), and Sal Rei (Boa Vista), where visitors can enjoy a mix of African and Portuguese influences. Collectively, these destinations provide a diverse and rich cruise

experience, blending natural wonders, cultural treasures, and robust port infrastructure to attract travellers from around the globe.

Due to the importance of this subsector, it is dealt with in greater depth in the section 9.3.2.

Figure 41. Cruises in Tenerife Port



### 9.3.3 Marine and Coastal Tourism

Coastal and marine tourism is a cornerstone of the blue economy, significantly contributing to the sustainable development of coastal regions. This sector not only generates substantial economic revenue through activities such as beach tourism, cruises, and water sports but also fosters local job creation in hospitality, transportation, and related services. Its capacity to attract international tourists enhances foreign exchange earnings, promoting economic growth in both developed and developing coastal nations. Furthermore, well-managed marine tourism can serve as a catalyst for investment in environmental conservation, ensuring that pristine marine ecosystems remain intact for future generations.

The impact of coastal and marine tourism extends beyond economic metrics, deeply influencing the social and environmental fabric of coastal communities. By promoting cultural exchanges and supporting small-scale enterprises such as local crafts and seafood markets, the sector uplifts local livelihoods and preserves unique cultural identities. Additionally, sustainable tourism practices can help protect biodiversity by funding marine conservation initiatives and encouraging environmentally conscious behaviour among tourists. For coastal communities, the integration of marine tourism into the broader blue economy creates a framework where development and ecological preservation go hand in hand.

Crucially, marine tourism is interconnected with other blue economy sectors, including fisheries, marine transportation, and renewable energy. For instance, vibrant coastal tourism relies on clean waters, which align with the goals of sustainable fishing practices and pollution reduction

efforts. Similarly, marine transportation facilitates the movement of tourists, while offshore renewable energy installations can serve as innovative attractions, showcasing the potential of sustainable energy solutions. This interdependence highlights the need for integrated management and policies that balance the diverse components of the blue economy, ensuring long-term resilience and prosperity for coastal regions.

### 9.3.4 Shipyards and Naval Repair

The shipbuilding and naval repair sector are a critical pillar of the blue economy, providing essential infrastructure and services for maritime industries. Shipyards not only design and construct vessels for cargo transport, fishing, and tourism but also offer maintenance and repair services that ensure the efficiency and safety of marine operations. This sector generates significant economic value by supporting a wide range of industries, creating skilled employment opportunities, and fostering technological innovation in maritime engineering. As global trade increasingly relies on maritime transport, the role of shipyards in maintaining a modern and sustainable fleet is more crucial than ever.

In coastal regions, the shipbuilding and repair industry has a profound socio-economic impact. It supports local economies by creating a demand for auxiliary services, such as supply chains for materials and technical expertise in engineering and manufacturing. Additionally, shipyards often act as hubs for training and education, equipping local communities with specialized skills and boosting their competitiveness in global markets. By adopting green technologies and sustainable practices, this sector can also contribute to environmental goals, reducing the ecological footprint of maritime activities and promoting cleaner, more energy-efficient solutions.

The shipbuilding and naval repair sector have a strong interrelationship with other blue economy industries, such as maritime transportation, offshore energy, and fisheries. Well-maintained vessels are essential for safe and efficient transportation, supporting global trade and the movement of goods. Similarly, offshore energy platforms depend on shipyard services for the construction and maintenance of specialized vessels and infrastructure. The fishing industry also relies on shipyards for designing and maintaining boats that adhere to sustainable fishing standards. This interconnectedness underscores the strategic importance of the shipbuilding sector in achieving a balanced and resilient blue economy.

In the Canary Islands, companies such as **Zamakona Yards**, **Tenerife Shipyards**, and **Astilleros Canarios S.A. (ASTICAN)** stand out for their expertise in ship construction, maintenance, and repairs. ASTICAN, for example, specializes in maintaining and converting all types of vessels and offshore platforms, while **Astilleros Alamar Canarias** provides custom services for shipowners, contributing to the operational efficiency of the maritime sector. These companies not only bolster the local economy but also create jobs and enhance technological innovation, elevating the Canary Islands as a hub for maritime engineering.

In the Azores and Madeira, the shipbuilding and repair sector is relatively modest and limited in scale. The region primarily relies on external shipyards for the construction and significant



maintenance of its maritime fleet. Local facilities focus mainly on minor repairs and maintenance, lacking the capacity for large-scale shipbuilding projects.

Overall, while both the Azores and Madeira are not major players in this sector. The reliance on external shipyards for substantial projects underscores the limited capacity within these regions to independently support large-scale maritime construction and repair needs.

The shipyard sector in Martinique is a dynamic sector that is essential for the local economy, offering a variety of services ranging from ship repair to shipbuilding. The main sites are:

- **Chantier Naval de la Martinique:** Located in Fort-de-France, this has a surface area of 20 000 m<sup>2</sup> and offers maintenance, repair, and refit services for various types of vessels, including military vessels, large yachts, and merchant vessels. Three categories of activities to cover a complete range of ship repair services
- **Carenantilles:** Based in Le Marin, this shipyard is specialised in the repair, renovation and maintenance of boats, yachts and superyachts. It offers comprehensive services for boaters and professionals

These shipyards play a crucial role in Martinique's economic development, supporting not only the maritime industry but also creating jobs and promoting vocational training.

As this sector falls outside the scope of this report, a more detailed exploration is not required.

### 9.3.5 Fisheries and Aquaculture

Fisheries and aquaculture are cornerstone sectors of the blue economy, providing food security, livelihoods, and economic opportunities for millions worldwide. Traditional fishing practices support coastal communities, supplying vital protein sources while contributing significantly to global trade through the export of seafood products.

On the other hand, aquaculture, the farming of aquatic organisms, is emerging as a sustainable solution to meet growing global demand for seafood. With innovations in technology and management, aquaculture offers opportunities to reduce pressure on wild fish stocks and promote more efficient and environmentally friendly seafood production.

The **Canary Islands' fishing sector** is a vital component of the archipelago's economy, providing employment and contributing to local food security. According to data from the Canary Islands Government's Department of Agriculture, Livestock, Fisheries, and Food Sovereignty, the region's fishing fleet comprises approximately **700 vessels**, predominantly small-scale artisanal boats operating in coastal waters. Total fish catch amounted to around **20,000 metric tons**, with key species including tuna, sardines, and mackerel.

**Aquaculture** has also gained prominence in the Canary Islands, complementing traditional fishing activities. The region focuses on the farming of species such as sea bream and sea bass, with production reaching approximately **7,000 metric tons** in recent years. This

development not only diversifies the local economy but also alleviates pressure on wild fish stocks, promoting sustainable seafood production.

The Canary Islands have established themselves as a strategic **hub for fishing services**, supporting operations in some of the most productive fishing grounds **in the Atlantic Ocean**. Located at the crossroads between Europe, Africa, and the Americas, the archipelago provides essential logistical and maintenance services to fleets operating in key Atlantic fishing zones such as the Canary Current Large Marine Ecosystem, the Northwest African Shelf, and the Central Atlantic waters around Cape Verde. The islands' ports, including Las Palmas de Gran Canaria and Santa Cruz de Tenerife, offer world-class facilities for vessel refuelling, provisioning, and maintenance. Additionally, the region's expertise in cold storage and fish processing supports the export of seafood products to global markets, further cementing its role as a critical hub in the Atlantic's blue economy.

The Port of Las Palmas in Gran Canaria serves as a vital hub for fishing services, catering to **international fleets from Japan, South Korea, and Russia**. The port offers essential support, including refuelling, provisioning, repairs, and cold storage, enabling these distant-water fleets to operate efficiently in the Atlantic. Its strategic location and advanced infrastructure make it a key logistical centre for these non-Atlantic-based fishing nations, strengthening its role in the global seafood supply chain.

The integration of fisheries and aquaculture into the blue economy framework underscores the Canary Islands' commitment to sustainable marine resource management. By adopting responsible fishing practices and advancing aquaculture technologies, the region aims to balance economic growth with the preservation of marine ecosystems, ensuring the long-term viability of its maritime industries.

Fisheries and aquaculture are deeply interconnected with other blue economy sectors, such as maritime transportation and marine tourism. Efficient and sustainable seafood supply chains rely on well-developed transportation networks, while coastal tourism often benefits from the cultural and culinary appeal of locally sourced seafood. Additionally, these sectors play a role in advancing marine science and conservation, as research on fish stocks, habitat health, and sustainable farming practices directly informs broader ocean management efforts. Together, fisheries and aquaculture contribute to a resilient and integrated blue economy, providing economic, social, and ecological benefits for coastal and global communities alike.

Fishing in **Madeira** plays a significant economic and recreational role, benefiting from its strategic location along migratory routes of various marine species. The deep waters surrounding the island, which reach depths of over 1,000 meters just minutes from the coast, are home to species like blue marlin, bigeye tuna, and dolphinfish, attracting sport fishers from around the world. Additionally, artisanal fishing is a vital part of the local economy, providing employment and contributing to the region's food security. The combination of sport and artisanal fishing in Madeira not only drives economic development but also supports marine resource conservation through sustainable practices. Madeira reported fish landings totalling approximately **500 metric tons**.

Fishing is also a key component of the **Azorean economy**, providing employment and supporting local communities. The region's fishing fleet comprises approximately **800 vessels**,

with around 90% measuring less than 12 meters in length, reflecting the artisanal nature of the industry. In 2021, the Azores reported fish landings totalling approximately **11,900 metric tons**, contributing to Portugal's overall catch. The primary species targeted include tuna, blackspot seabream, and various deep-sea fish, with fishing activities concentrated around the islands' slopes and numerous seamounts within the Azores' Exclusive Economic Zone. This sector not only supplies fresh seafood to local and national markets but also plays a crucial role in preserving the cultural heritage and social fabric of the Azorean communities.

Fishing is also relevant of the economies in **Martinique and neighbouring French Caribbean** islands, such as Guadeloupe. In Martinique, the fishing industry is predominantly artisanal, with approximately **600 registered fishers operating small vessels** in coastal waters. The annual catch in **Martinique** is estimated at around **5,000 metric tons**, focusing on species like snapper, grouper, and lobster. Aquaculture in **Martinique** began in the 1980s. Today, there are 9 aquaculture farms producing 35 tons of fish per year.

### 9.3.6 Ocean and Renewable Energy associated with the ocean

Ocean energy and renewable energy associated with the ocean represent a transformative pillar of the blue economy, offering sustainable solutions to the global energy crisis while reducing greenhouse gas emissions. This sector encompasses several technologies, including **wave energy**, which harnesses the kinetic energy of ocean waves; **tidal energy**, which utilizes the predictable movement of tides; and **ocean thermal energy conversion (OTEC)**, which exploits temperature differences between surface and deep waters to generate power. Additionally, **offshore wind energy** has emerged as one of the most rapidly growing renewable energy sources, taking advantage of consistent and powerful wind currents over the ocean.

The potential of these technologies is vast, particularly for island and coastal regions, where the proximity to the ocean offers opportunities for localized energy production. Ocean energy not only provides a reliable and sustainable power source but also creates jobs and drives innovation in engineering and marine technologies. Furthermore, integrating these systems with other blue economy sectors, such as aquaculture or desalination plants, can enhance efficiency and resource use, creating a synergistic model for sustainable development.

While some technologies, like offshore wind energy, are already commercially viable, others, such as wave and tidal energy, remain in developmental phases but hold immense promise for future energy systems. By advancing ocean energy technologies, coastal nations can diversify their energy portfolios, reduce dependency on fossil fuels, and contribute to global climate goals, making this sector a cornerstone of a resilient and sustainable blue economy.

In Macaronesia, particularly the Canary Islands, there is a significant focus on developing offshore wind energy. As of 2022, 25 offshore wind projects have been proposed in the region, including the experimental "Mar de Canarias" wind farm in Gran Canaria, with a planned capacity of 10 megawatts.

Additionally, the RESMAC project aims to enhance the integration of renewable energies in Macaronesia, promoting a green economy through technological solutions that support the decarbonization of key sectors such as tourism and industry.

In Martinique, the share of renewal energy in the total energy production increases from 1,4% in 2008 to 23,1% in 2020 with 14,3% from biomass, 5,6% for solar energy, 2,6% for wind energy and 0,7% for wastes energy.

While specific ocean energy projects are limited, the region's abundant marine resources present opportunities for future development in this sector.

Overall, both Macaronesia and the French Caribbean are actively pursuing renewable energy initiatives, with a particular emphasis on offshore wind and biomass conversion, respectively. These efforts are crucial for reducing energy dependence and promoting sustainable development in these island regions.

As this sector falls also outside the scope of this report, a more detailed exploration is not required.

### 9.3.7 Maritime Extractive Industry

The maritime extractive industry is a significant component of the blue economy, encompassing the exploration and extraction of resources from the seabed and marine environments. This sector includes the extraction of minerals, oil, and gas, as well as the harvesting of resources such as sand or gravel.

While the economic benefits of this industry are substantial, providing raw materials essential for modern infrastructure and technology, its activities must be carefully managed to ensure they align with sustainability principles. This is particularly important as deep-sea mining and offshore drilling increasingly come under scrutiny for their potential environmental impacts.

Incorporating the maritime extractive industry into the blue economy involves balancing economic benefits with ecological stewardship. Coastal and island communities often rely on revenues and employment opportunities generated by this sector, from offshore drilling platforms to marine construction materials. However, sustainable practices are essential to mitigate the ecological risks posed by habitat destruction, pollution, and overexploitation. Innovations such as cleaner extraction technologies, habitat restoration efforts, and stringent environmental regulations are key to ensuring that this sector contributes positively to the blue economy.

The maritime extractive industry, encompassing activities such as offshore oil and gas extraction and deep-sea mining, is not particularly prominent in Macaronesia or the French Caribbean. In Macaronesia the focus has traditionally been on sectors like tourism and fishing. However, there have been instances of interest in offshore resources. For example, in 2014, the Spanish government announced plans for oil exploration near the Canary Islands, leading to environmental concerns and regional opposition. Similarly, in Martinique, the extractive industry is limited, with the economy primarily driven by tourism, agriculture, and services. While there may be some small-scale extraction activities<sup>21</sup>, they do not play a significant role in the region's economic landscape. Overall, both regions have minimal involvement in the maritime extractive

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<sup>21</sup> For instance in Azores this small-scale extractions include such as no metallic mineral resources like sand, rolled pebbles, etc.

industry, focusing instead on sustainable practices and the preservation of their natural environments.



## 9.4 COMPATIBILITY AMONG DIFFERENT SECTORS

As mentioned above, the blue economy encompasses diverse economic activities related to oceans, seas, and coasts, including coastal and marine tourism, maritime transport, fisheries and aquaculture, marine renewable energy, marine biotechnology, seabed mining, and ecosystem conservation.

It is essential to integrate these sectors promoting sustainable development that balances economic growth with marine environmental protection.

Among the sectors of the blue economy, there are both elements that may have a negative impact and others with a positive influence, highlighting the complex interplay between activities. While evident synergies exist—such as the mutual benefits between offshore wind energy development and maritime transport infrastructure or the potential for marine conservation efforts to enhance sustainable tourism—there are also detracting elements that must be carefully managed. For instance, conflicts may arise between fisheries and marine renewable energy projects, or between seabed mining and biodiversity conservation. Addressing these challenges requires a holistic perspective that integrates sectoral needs, minimizes conflicts, and promotes balanced development to ensure long-term sustainability and equitable benefits across all activities.

**Coastal and marine tourism** is a significant source of income and employment in Macaronesia. However, its expansion can result in negative impacts such as habitat degradation, pollution, increased demand for electricity generation, heightened pressure on goods and resources to meet tourist needs, and the occupation of coastal areas. Mitigating these effects requires the implementation of sustainable practices that safeguard marine and coastal ecosystems while addressing the broader resource and environmental demands of tourism. For instance, the **Macaronesian Maritime Alliance (A3M)** actively promotes collaboration among the archipelagos to encourage sustainable and responsible tourism that aligns with the principles of environmental protection and resource efficiency.

The A3M is an initiative aimed at strengthening cooperation among the Macaronesian archipelagos. Its primary goal is to promote the sustainable development of the blue economy in the region by fostering collaboration in sectors such as coastal and marine tourism, maritime transport, fisheries and aquaculture, marine renewable energy, and ecosystem conservation. The A3M was established as a milestone for the blue economy in the area, coinciding with the announcement of the International Maritime Fair (FIMAR) 2022.

Among A3M's key activities are the promotion of sustainable practices in tourism, fisheries, and aquaculture, as well as advancing joint projects in marine renewable energy and biotechnology. Additionally, the alliance is committed to protecting and conserving marine biodiversity, recognizing the importance of ecosystem services for local community well-being and ecosystem resilience. A3M also aims to position Macaronesia as a global leader in innovation and sustainability within the marine and maritime sectors, exploring opportunities for internationalization and enhancing regional cooperation.

**Maritime transport** is vital for trade and connectivity among the Macaronesia and French Caribbean islands, playing a crucial role in the local economy. However, it also generates



environmental impacts, such as pollution and greenhouse gas emissions. Adopting cleaner and more efficient technologies, such as alternative fuels (hydrogen, methanol, among others) and advanced propulsion systems, can significantly reduce its environmental footprint.

In addition to its role in transportation, maritime infrastructure—such as ports and shipyards—is essential for supporting other strategic sectors. These facilities are critical for offshore wind energy development, serving as logistical hubs for the construction, operation, and maintenance of wind farms. Moreover, they are strategic locations for emerging industries related to new fuels, such as green hydrogen or methanol. These initiatives are pivotal in the energy transition and could position Macaronesia as a centre of innovation in the blue economy.

**Marine spatial planning** is key to optimizing the use of maritime infrastructure while minimizing conflicts with other activities, such as fisheries and ecosystem conservation. The European Union, in its sustainable blue economy strategy, highlights the importance of integrating these elements to maximize synergies among sectors and promote balanced and sustainable development.

**Fisheries and aquaculture** are fundamental to food security and the economy of Macaronesia and in the Caribbean. However, overfishing and unsustainable practices can deplete marine resources. Sustainable fisheries management and promoting responsible aquaculture practices are essential to maintaining healthy marine ecosystems. The Macaronesian Maritime Alliance and the Caribbean actors works to advance sustainable practices in fisheries and aquaculture by fostering collaboration among the archipelagos.

Harnessing energy from **Marine Renewable Energy** (sources such as offshore wind, tides, and waves) offers opportunities to diversify the energy matrix and reduce carbon emissions in Macaronesia and in the Caribbean. However, it is crucial to assess and mitigate potential impacts on marine life and other economic activities. The European Union has emphasized the importance of marine renewable energy in its blue economy strategy.

Thus, the development of renewable energy: i) is crucial for ensuring greater energy independence for the Macaronesian and Caribbean territories, which currently rely heavily on imported fossil fuels to meet their energy demands, and ii) can provide a reliable and sustainable power supply tailored to the unique geographic and marine conditions of these islands.

This transition not only strengthens energy security but also supports the broader needs of the islands' economy. Key sectors of the blue economy, such as tourism, which requires substantial energy for accommodation, transportation, and related services, stand to benefit significantly from a more resilient and sustainable energy infrastructure. Furthermore, renewable energy can power innovative activities such as aquaculture, marine biotechnology, and port operations, fostering economic growth while aligning with global sustainability goals. Investing in marine renewable energy represents a transformative opportunity for Macaronesia, driving self-reliance and promoting the sustainable development of all island sectors.

Research and development in **Marine Biotechnology** and products derived from marine organisms have applications in medicine, cosmetics, and other fields. It is important to ensure that exploiting these resources is done sustainably, respecting biodiversity and marine

ecosystems. In Macaronesia and in the Caribbean, opportunities in marine biotechnology include using algae for biotechnological applications.

Extracting minerals and/or oil & gas from the **seabed mining** could provide valuable resources, but it also poses significant risks to deep-sea ecosystems. Strict regulatory frameworks and comprehensive environmental impact assessments are essential before initiating any mining activity. The European Union's sustainable blue economy strategy considers seabed mining as a potential sector requiring careful management.

Integrating all these sectors requires effective marine spatial planning that considers the needs and potential conflicts between different activities. Collaboration among governments, industries, local communities, and environmental organizations is key to developing policies and practices that promote coexistence and mutual benefits. The Macaronesian Maritime Alliance exemplifies regional cooperation to advance the blue economy, foster cluster development, explore internationalization opportunities, and identify potential joint projects.

In conclusion, integrating the diverse sectors of the blue economy in Macaronesia and in the Caribbean while protecting marine biodiversity and preserving ecosystem is essential to achieving sustainable development that balances economic growth with marine environmental conservation. Implementing sustainable practices, adopting clean technologies, and fostering collaboration among stakeholders are fundamental to reaching this goal.

## 9.5 DETAILED ANALYSIS OF THE MARITIME-TOURISM SECTOR

### 9.5.1 Market Overview, Evolution and Trends

#### 9.5.1.1 Global Marina Market Overview and Trends

The global marina market is a dynamic and steadily growing industry driven by increasing interest in recreational boating, luxury tourism, and coastal leisure activities. According to industry reports, the marina market is projected to grow at a compound annual growth rate (CAGR) of approximately 4-5% until 2028<sup>22</sup>. Key regions such as North America and Europe dominate the market, with Asia-Pacific emerging as a significant growth area due to increasing investments in waterfront developments.

Globally, marinas cater to a diverse range of customers, including recreational boaters, yachting enthusiasts, and transitory vessels. Key trends shaping the industry include:

- **Sustainability:** Many marinas are adopting eco-friendly practices, such as implementing green certifications, renewable energy sources, and sustainable waste management systems.
- **Technological Integration:** Modern marinas increasingly utilize technology, including smart marina systems, automated berthing processes, and digital booking platforms to enhance user experience.
- **Luxury Tourism:** High-end marinas are evolving into integrated destinations offering not just berthing but also luxury services like spas, gourmet dining, and exclusive retail.
- **Regional Focus:** The Mediterranean region remains a hub for superyachts and high-capacity marinas, while North America focuses on diversified recreational offerings.

Macaronesia is strategically positioned as a gateway for transatlantic nautical tourism. The region's marinas have evolved to support both local boating communities and international yachting traffic. This growth is further fuelled by the area's exceptional tourist appeal, which combines breathtaking natural landscapes, mild year-round climate, and a rich cultural heritage. Visitors are drawn to its pristine beaches, volcanic formations, and lush greenery, as well as the

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<sup>22</sup> The projected compound annual growth rate (CAGR) of approximately 4-5% for the marina market between 2021 and 2028 is supported by several industry reports: 1) **UpMarketResearch** reports a global marina market CAGR of 5.3% for 2021-2028. ([Marinas Market Research | Global Industry Analysis & Forecast To 2028](#))

**The Business Research Company** forecasts a CAGR of 5.1% for the marina market from 2023 to 2028 ([The Business Research Company](#)); and 3) **Growth Market Reports** anticipates a CAGR of 7.4% for the global marinas market during the forecast period. ([Growth Market Reports](#))

charm of historic towns and vibrant local traditions. The unique geographic and cultural features of Macaronesia make it a preferred destination for recreational sailors and yacht owners, fostering the development of the marina sector as a cornerstone of its tourism industry.

Some key Insights of marina's development in Macaronesia are reflected below:

- **Tourism-Driven Demand:** Macaronesia's and Martinique's location between Europe, Africa, and the Americas makes it an essential hub for transatlantic regattas and yachting events, particularly during peak seasons like September to December.
- **Sustainability Initiatives:** Many marinas are adopting eco-friendly certifications, such as Blue Flag status, to appeal to environmentally conscious boaters.
- **Digital Transformation:** Investment in modern marina management systems is growing, streamlining berth reservations and enhancing customer experience.
- **Luxury and Multifunctional Offerings:** Larger marinas in the Canary Islands and Madeira increasingly serve as comprehensive destinations, offering services like shopping, dining, and high-end accommodations.

Technological integration, sustainability initiatives, and a shift toward luxury services are reshaping the marina industry. Investments in eco-friendly infrastructure, smart marina systems, and premium facilities are aligning the sector with broader environmental and economic goals, making marinas pivotal in the blue economy.

The marina market in Macaronesia has seen steady development due to investments in expanding berthing capacity and improving facilities. The Canary Islands, for example, have embraced a mixed management model combining public administration and private concessions to enhance efficiency and service quality. Madeira's focus on integrating its marinas with broader tourism offerings underscores the region's strategy to appeal to diverse segments of the boating market.

Marinas play a pivotal role in the blue economy, acting as essential facilitators and hubs for synergies across various sectors that rely on sustainable use of ocean resources. Beyond providing berthing and support for recreational boating, marinas serve as gateways to activities like diving, whale watching, and sunset cruises, all of which contribute significantly to local economies by attracting tourists and supporting related industries. For instance, diving operations often use marinas as departure points, drawing enthusiasts to explore the region's underwater ecosystems. Similarly, whale-watching excursions leverage marina infrastructure to provide seamless access to rich marine biodiversity. Marinas also complement the hospitality sector, offering spaces for restaurants, shops, and tour operators, which enhance the visitor experience while promoting sustainable tourism. By integrating these activities, marinas not only drive economic growth but also reinforce the broader blue economy by fostering environmentally responsible practices and encouraging conservation of marine resources.

### 9.5.1.2 Regional Analysis and growth drivers

The marina market varies significantly across regions all over the world:

- **North America:** Dominated by the United States and Canada, North America boasts a vast coastline and extensive inland waterways. High urbanization and strong demand for recreational boating drive the growth in this region.
- **Latin America:** Coastal countries like Panama capitalize on their strategic locations with services catering to both local users and international tourists.
- **Europe:** As a historical hub for luxury yachting, Europe remains a leader in marina infrastructure and services, with countries like Italy, Spain, and Greece dominating the market.
- **Asia-Pacific and the Middle East & Africa:** Emerging markets in Asia-Pacific and high-end tourism hubs like Dubai are contributing to the rapid growth of marina infrastructure, fuelled by increased tourism and investment in coastal development.

The expansion of the global marina market is influenced by several factors:

- **Urbanization and Population Growth:** Rising urbanization rates and population density near coastal areas directly correlate with higher demand for marina services.
- **Tourism Growth:** Coastal tourism, driven by luxury resorts and activities like sailing and diving, fuels marina development in regions like the Mediterranean and Southeast Asia.
- **Climate Change Impacts:** Rising sea levels and the development of marine routes for offshore energy production create new demands for marina infrastructure.
- **Recreational Boating Trends:** An increase in boating enthusiasts seeking convenient access to coastal amenities has spurred growth in marinas across urban centres and scenic locations.

### 9.5.1.3 Types and application of Marinas

The global marina market is classified by types of marinas, applications, and regional presence. This segmentation highlights the diverse infrastructure, services, and user bases that define the industry.

- **Small Marinas:** Found in smaller coastal towns or tourist destinations with populations under 100,000, these marinas primarily cater to small boats, often under 25 feet (7.6 meters) in length. They provide essential services such as boat slips, basic repairs,

fuelling stations, and sometimes nearby dealerships for small boat owners. Facilities are usually simpler, with limited or no dry dock storage, focusing on day rentals and quick services.

- **Medium-Size Marinas:** Catering to boats between 40 feet (12.2 meters) and 100 feet (30.5 meters) in length, medium-size marinas offer a broader range of services, attracting both fishing enthusiasts and families looking for recreational boating options. These facilities often include repair services, dry dock storage, and a variety of vessels for rent, purchase, or charter, such as speedboats, catamarans, and small yachts. They serve as versatile hubs for boaters seeking multiple services in one location.
- **Large Marinas:** Located in major fishing ports, tourist hubs, and busy commercial areas, large marinas accommodate vessels exceeding 100 feet (30.5 meters). These facilities offer advanced infrastructure such as dry docks, 24/7 refuelling stations, security, and exclusive slip rentals. Large marinas are designed to support luxury yachts and provide integrated services, including premium restaurants, marine dealerships, and high-capacity berths for long-term docking.

As far as the application of marinas is concerned, we can find the following relevant aspects:

- **Pleasure Marinas:** These facilities cater to recreational boating enthusiasts, providing services like fuelling, maintenance, garbage disposal, and access to dining and shopping options. They often include dry storage or launch services for larger powerboats, creating a complete leisure experience.
- **Fishing Marinas:** Designed to meet the needs of commercial and recreational fishers, these marinas feature facilities such as floating or fixed moorings, depth-measuring equipment, automated ramp operations, and dockside power supplies. Their services are tailored to support fishing activities and boat maintenance efficiently.
- **Commercial Marinas:** These marinas often serve as scenic and functional backdrops for commercial filming or other business ventures. They provide accessible docking services and spaces for showcasing watercraft or filming boating activities.
- **Military Marinas:** Often located near naval bases, military marinas provide essential infrastructure for maintaining ships and watercraft. They also offer recreational services for military personnel, emphasizing their strategic importance in defense-related and leisure activities.

Macaronesia's marina landscape leans heavily toward small and medium-sized facilities catering to recreational and fishing activities. The dominant trends reflect a region focused on supporting tourism and local communities. This alignment with leisure and small-scale maritime activities positions Macaronesia as a versatile yet predominantly community-oriented nautical hub within the global blue economy.



Based on the data and analysis of the Macaronesia region below, marinas in this area tend to be smaller or medium-sized rather than large. While there are facilities capable of accommodating larger vessels, such as megayachts, these are less common, reflecting the region's focus on accommodating local boating needs and small-to-medium recreational vessels rather than exclusively serving luxury or superyacht markets.

- **Smaller Marinas Dominate:** Many marinas in Macaronesia, particularly in the Azores and Madeira, have a capacity tailored to small to medium-sized vessels (under 40 feet or 12.2 meters). For instance, Porto Santo's marinas average 110 berths, and many marinas in the Azores cater primarily to vessels under 25 feet (7.6 meters).
- **Medium-Sized Marinas:** Facilities in Madeira and the Canary Islands offer a higher average capacity, with marinas like Marina da Calheta (337 berths) or Marina Santa Cruz providing robust infrastructure for medium-sized vessels. These marinas often serve as hubs for regional boating and tourism activities.
- **Large Marinas Are Limited:** While large marinas exist, such as those in the Canary Islands catering to megayachts, they are the exception rather than the norm. Their presence is strategically aligned with the islands' role as a transatlantic stopover and tourism hub.

Most marinas focus on recreational and pleasure activities, reflecting the region's strong reliance on nautical tourism. Activities like sailing, whale watching, diving, and sunset cruises are significant drivers for marina use.

These marinas also attract international visitors due to Macaronesia's strategic position as a transatlantic waypoint especially between April and July.

For instance in 2009, it recorded a peak of approximately 1,300 vessels from Marina of Horta in Azores. In 2022, by May 31, it registered 557 entries, surpassing the 522 entries during the same period in 2019, the last pre-pandemic year. The marina is an almost mandatory stop for sailboats traveling from the Caribbean to the Mediterranean, annually hosting hundreds of recreational vessels.

Similarly, sporting competitions are also organized, such as those held by the Atlantic Rally for Cruisers (ARC). In the ARC regatta, around 300 boats set sail from Las Palmas de Gran Canaria at the end of November for their adventure across the Atlantic Ocean, heading directly to Saint Lucia, where they are welcomed in Rodney Bay.

The ARC+ Rally starts two weeks earlier and reaches the Caribbean before the main ARC fleet. The over 100 yachts participating in ARC+ begin their journey in early November from Las Palmas de Gran Canaria. Their first stop, after 850 nautical miles, is Mindelo, São Vicente in the Cape Verde Islands, a crossing that takes between 5 and 7 days.

Some commercial companies offer the possibility of joining Atlantic crossing adventures from various ports in Macaronesia to the Caribbean (or in the opposite direction) as a luxury and adventure experience.

Figure 42. Samples of adventure experiences crossing the Atlantic from Macaronesian ports



**Sailing adventure: Atlantic crossing under sails from Canarias to the Caribbean!**

Port of departure: Santa Cruz de Tenerife, Spain

★★★★★ 3 reviews

Next departure: 21 november



**Atlantic Crossing under Sails from Bermuda to the Azores in a Tall Ship**

Port of departure: St. George's, Bermuda

★★★★★ 3 reviews

Next departure: 2 march



**Atlantic crossing and ARC 2025 from Gran Canaria to Santa Lucia**

Port of departure: Las Palmas de Gran Canaria, Spain

★★★★★ 1 review

Next departure: 21 november

Source: Sailwiz<sup>23</sup>

There, a 3 to 5-day stopover is planned, allowing participants to explore the island before continuing their journey to the Caribbean. The next leg, covering 2,150 nautical miles, takes between 12 and 16 days. ARC+ participants benefit from making a stopover and enjoying the second part of the journey, taking advantage of the southern route, which mostly offers favorable trade wind conditions.

**Artisanal and commercial fishing marinas** are particularly relevant in the Azores and parts of the Canary Islands. These marinas support local economies and contribute to the blue economy by sustaining the fishing industry.

While there are commercial marinas catering to charter services or local businesses, they are not as prevalent as pleasure or fishing marinas. Military marinas, while present, are specialized and do not form a significant portion of marina activity in the region and they are out of the scope of this report.

<sup>23</sup> Available on the date of the report on <https://www.sailwiz.com/en/offer/atlantic-crossing/b/23>

#### 9.5.1.4 Administration and management of marinas in Macaronesia

The management of marinas is carried out through a combination of direct management by public entities and concessions granted to private operators. Below is a detailed structure of management for each territory:

##### The Canary Islands:

- **Direct Management:** The public entity "*Puertos Canarias*", under the Government of the Canary Islands, is responsible for the direct management of certain ports and marinas in the archipelago. Its primary role is to coordinate and administer port infrastructures of regional interest. Additionally, Port Authority of Las Palmas (depending on the Ministry of Transport of the Government of Spain) manage the biggest marina in Macaronesia in La Luz (Las Palmas de Gran Canaria) directly with 1.273 berths.
- **Concessions:** In addition to direct management, "*Puertos Canarias*" grants concessions to private entities for the operation and management of specific marinas and associated services. These concessions allow specialized companies to operate port facilities under public oversight. IN addition, while Port Authority of Las Palmas has granted two concessions in the ports of Arrecife and Puerto Rosario, the Port Authority of Santa Cruz de Tenerife manages seven marinas located in port areas under administrative concession. The Port of Santa Cruz de Tenerife includes the Marina Santa Cruz, located in the Los Llanos dock, the Marina Tenerife in the Fishing Dock, and Puerto Chico, also in the Fishing Dock. Additionally, a marina is operational in Los Cristianos, in the south of Tenerife. In the Port of San Sebastián de La Gomera, the Marina La Gomera is located, while another marina in La Palma is managed by Puerto Calero. The most recent marina is located in the Port of La Estaca, on El Hierro. With its recent addition, the Tenerife port system now offers 1,300 berths on floating docks.

The creation of marinas in commercial port docks has provided services in areas that, due to their shallow depth, were not suitable for conventional operations. With their implementation, the ports of the western islands offer significant services to boating enthusiasts. The strategic location of the Canary Islands between continents makes them a frequent stop for many recreational vessels before crossing the Atlantic.

##### Madeira:

- **Direct Management:** The *Administração dos Portos da Região Autónoma da Madeira* (APRAM) is the public entity responsible for the direct management of ports and marinas in Madeira. APRAM supervises and administers port infrastructures, ensuring their functionality and maintenance.
- **Concessions:** Similar to the Canary Islands, APRAM grants concessions to private companies for the management of certain marinas, fostering public-private collaboration in the administration of these facilities.

### Azores:

- **Direct Management:** The *Portos dos Açores, S.A.* is the public company in charge of the direct management of ports and marinas in the Azores archipelago. This entity oversees the operation and maintenance of port infrastructures across the islands.
- **Concessions:** *Portos dos Açores* also grants concessions to private operators for the management of specific marinas, promoting efficiency and quality in the services provided.

In summary, marina management in Macaronesia combines direct administration by dedicated public entities in each region with the concession of operations to private companies, aiming to optimize the functionality and services of port infrastructures.

### 9.5.2 Conventional Marinas: Description of facilities and their capacity

The table below provides a detailed comparison of marina infrastructure across four island regions: the Canary Islands, Azores, Madeira, and Martinique. It highlights the total number of marinas, berths, average marina size, largest marina in each region, and the berth-per-capita ratio.

The Canary Islands lead with 30 marinas offering a combined total of 8,546 berths, making them the most developed region in terms of marina capacity. The average size of marinas here is 285 berths, and the largest marina provides 1,263 berths, the highest capacity among the regions. The berth-per-capita ratio for the Canary Islands is 3.7 berths per 1,000 inhabitants, indicating a significant but proportional maritime infrastructure relative to its large population.

The Azores, with 13 marinas and 2,176 berths, have the smallest marinas on average, with an average size of 167 berths. The largest marina in the Azores has a capacity of 300 berths. However, the region boasts the highest berth-per-capita ratio of 8.9 berths per 1,000 inhabitants, reflecting its strong emphasis on nautical tourism despite its smaller overall capacity.

Madeira, with 6 marinas and 1,111 berths, has an average marina size of 185 berths. The largest marina in Madeira offers 337 berths. Its berth-per-capita ratio is 4.3 berths per 1,000 inhabitants, indicating a balanced infrastructure that supports both the resident population and visiting vessels.

Martinique also has 6 marinas, but its total of 1,939 berths and an average marina size of 323 berths make it stand out as the region with the largest average marina capacity. The largest marina, Marina du Marin, has 1,211 berths, making it a key hub for nautical activities in the Caribbean. Martinique has a berth-per-capita ratio of 3.5 berths per 1,000 inhabitants, similar to the Canary Islands.

In total, these four regions host 55 marinas with 13,772 berths. The average size of marinas across all regions is 250 berths, and the largest marina overall is in the Canary Islands with 1,263 berths. The combined berth-per-capita ratio for these regions is 4.5 berths per 1,000 inhabitants.

Table 32. Marinas in the Region

Island	Total Marinas	Total Berths	Average Size of Marinas	Largest Marina (Berths)	Population	Berth per capita (x 1000)
The Canary Island	30	8,546	285	1,263	2,281,632	3.7
Azores	13	2,176	167	300	245,005	8.9
Madeira	6	1,111	185	337	256,543	4.3
Martinique	6	1,939	323	1,211	251,060	3.5
<b>Total</b>	<b>55</b>	<b>13,772</b>	<b>250</b>	<b>1263</b>	<b>3,034,240</b>	<b>4.5</b>

Source: Own Elaboration

According to the Spanish Federation of Nautical Tourism (ANEM) the ratio of boats per 1,000 inhabitants in Spain at 4.2. This figure is much lower than other coastal countries in the UE, such as Croatia (24.4) and Greece (15.7). The European list is topped by Norway (156.9), Finland (148), and Sweden (75.4).

The graph shows the relationship between GDP per capita and the number of inhabitants per boat, where a higher position on the vertical axis indicates a lower ratio (fewer boats per inhabitant), and a lower position reflects a higher ratio (more boats per inhabitant). Countries like Norway, Finland, and Sweden are positioned at the top, showcasing a high density of boats relative to their population, reflecting well-developed nautical infrastructure and strong maritime cultures. In contrast, Spain and other nations at the bottom, with lower ratios, reveal less developed recreational boating accessibility.

The Canary Islands, Martinique, Azores, and Madeira, collectively with ratios similar to Spain's, present significant potential for growth in the nautical sector. Their ratios indicate limited boat accessibility relative to their populations, despite their geographic advantages and extensive coastlines. Developing this sector in these island regions could unlock opportunities for tourism and economic expansion, aligning them with the higher-performing countries on the graph.

Figure 43. Ratio berth / inhabitant (x1000) and PIB per capita in different markets



Source: ANEM<sup>24</sup>

Below is a detailed analysis of the main marinas in each region.

### 9.5.2.1 Marinas in the Canary Islands

The Canary Islands host a total of 8,546 berths across 30 marinas, distributed among seven islands. Gran Canaria has the highest number of berths, with 2,596, representing 30.4% of the total, and also hosts the largest marina, Muelle Deportivo de Las Palmas, with 1,263 berths. Tenerife follows with 1,804 berths (21.1%), and Lanzarote ranks third with 1,446 berths (16.9%). La Gomera has 974 berths (11.4%), Fuerteventura features 785 berths (9.2%), La Palma provides 701 berths (8.2%), and El Hierro has the smallest share, with 240 berths (2.8%).

Table 33. Marinas in the Canary Islands

	Marina	Island	Number of Berths	% Berths	Marine-related activities promoted
1	Puerto Deportivo de La Restinga	El Hierro	120	1.4%	Diving in its renowned marine reserve and eco-tourism

<sup>24</sup> ANEN (Asociación Nacional de Empresas Náuticas). Report "Situación y Futuro de la Náutica Recreativa en España. Propuestas Dinamizadoras" ("Situation and Future of Recreational Boating in Spain. Dynamic proposals"). Available at <https://www.anen.es/download/general/General/Art%C3%ADculo%20revista%20Econom%C3%ADa%20Industrial.pdf>



	Marina	Island	Number of Berths	% Berths	Marine-related activities promoted
2	Puerto Deportivo de Marina El Hierro	El Hierro	120	1.4%	Fishing tours and underwater photography
	<b>Total El Hierro</b>		<b>240</b>	<b>2.8%</b>	
3	Puerto Deportivo de Corralejo	Fuerteventura	215	2.5%	Boat tours to Isla de Lobos and water sports like windsurfing
4	Puerto del Castillo	Fuerteventura	110	1.3%	Jet skiing, snorkelling, and coastal tours
5	Puerto Deportivo de Gran Tarajal	Fuerteventura	170	2.0%	Fishing and access to local festivals
6	Puerto Deportivo de Morro Jable	Fuerteventura	290	3.4%	Dolphin-watching tours and recreational boating
	<b>Total Fuerteventura</b>		<b>785</b>	<b>9.2%</b>	
7	Muelle Deportivo de Las Palmas	Gran Canaria	1,263	14.8%	Sailing events and transatlantic crossings
8	Puerto de Mogán	Gran Canaria	225	2.6%	Submarine excursions and diving
9	Puerto Deportivo de Puerto Rico	Gran Canaria	525	6.1%	Fishing and boat rentals
10	Puerto Deportivo de Pasito Blanco	Gran Canaria	388	4.5%	Sailing and luxury tourism
11	Muelle Deportivo Marina Anfi del Mar	Gran Canaria	102	1.2%	Fishing and small boat rentals
12	Puerto de Arguineguín	Gran Canaria	93	1.1%	Fishing and small boat rentals
	<b>Total Gran Canaria</b>		<b>2,596</b>	<b>30.4%</b>	
13	Puerto Deportivo de Valle Gran Rey	La Gomera	204	2.4%	Dolphin watching and local boat tours
14	Puerto Deportivo de San Sebastián	La Gomera	335	3.9%	Access to historical maritime routes
15	Puerto Deportivo de Vueltas	La Gomera	100	1.2%	Eco-tourism and small fishing activities
16	Puerto Deportivo de Marina La Gomera	La Gomera	335	3.9%	Recreational boating and access to hiking trails
	<b>Total La Gomera</b>		<b>974</b>	<b>11.4%</b>	
17	Puerto Deportivo de La Palma	La Palma	180	2.1%	Deep-sea fishing and sunset cruises
18	Puerto Deportivo de Tazacorte	La Palma	341	4.0%	Sailing and kayaking

	Marina	Island	Number of Berths	% Berths	Marine-related activities promoted
19	Puerto Deportivo de Marina La Palma	La Palma	180	2.1%	Whale watching and local festivals
	<b>Total La Palma</b>		<b>701</b>	<b>8.2%</b>	
20	Marina Rubicón	Lanzarote	487	5.7%	Luxury yachting and diving
21	Puerto Calero	Lanzarote	450	5.3%	Sailing regattas and luxury tourism
22	Marina Lanzarote	Lanzarote	380	4.4%	Long-term yacht berthing and maritime events
23	Puerto Deportivo de Playa Blanca	Lanzarote	129	1.5%	Ferry connections and small boat tours
	<b>Total Lanzarote</b>		<b>1,446</b>	<b>16.9%</b>	
24	Marina Santa Cruz	Tenerife	152	1.8%	Access to the city and cultural events
25	Marina del Atlántico	Tenerife	220	2.6%	Sailing and tourism
26	Puerto Deportivo Radazul	Tenerife	360	4.2%	Diving and fishing
27	Marina San Miguel	Tenerife	344	4.0%	Supports golf and nautical tourism
28	Puerto Deportivo de Los Gigantes	Tenerife	368	4.3%	Whale watching and kayaking
29	Puerto Deportivo de Los Cristianos	Tenerife	200	2.3%	Ferry connections and leisure boating
30	Puerto Deportivo de Garachico	Tenerife	160	1.9%	Cultural tourism and fishing activities
	<b>Total Tenerife</b>		<b>1,804</b>	<b>21.1%</b>	
	<b>Overall total</b>		<b>8,546</b>	<b>100.0%</b>	

Source: Own elaboration

Each marina supports diverse nautical and touristic experiences, catering to both locals and international visitors.

In the Canary Islands, the average marina size and the largest marina vary significantly between islands. El Hierro has an average marina size of 120 berths, with its largest marina being Puerto Deportivo de La Restinga (120 berths). Fuerteventura has an average of 196 berths, and its largest marina is Puerto Deportivo de Morro Jable (290 berths). Gran Canaria stands out with an average marina size of 433 berths, and the largest marina in the entire archipelago is Muelle Deportivo de Las Palmas (1,263 berths). On La Gomera, the average marina size is 244 berths, and the largest is Puerto Deportivo de San Sebastián (335 berths). La Palma has an average marina size of 234 berths, with Puerto Deportivo de Tazacorte (341 berths) being the largest.

These figures highlight the varying capacities and roles of marinas across the islands, with Gran Canaria clearly dominating in terms of both average size and the capacity of its largest facility.

The larger the marina, the greater its capacity to attract companies within the maritime tourism sector, and the larger the average size of marinas on an island, the greater the potential development of this sector on the island

Table 34. Number and averaged size of Marinas in the Canary Islands

Island	Total Marinas	Total Berths	Average Size of Marinas	Largest Marina (Berths)
El Hierro	2	240	120	120
Fuerteventura	4	785	196	290
Gran Canaria	6	2,596	433	1,263
La Gomera	4	974	244	335
La Palma	3	701	234	341
Lanzarote	4	1,446	362	487
Tenerife	7	1,804	258	368
<b>Total</b>	<b>30</b>	<b>8,546</b>	<b>285</b>	<b>1,263</b>

Source: Own elaboration

Based on the data, the number of marina berths per inhabitant varies significantly across the Canary Islands:

- El Hierro has the highest ratio of berths per capita, with 21.5 berths per 1,000 inhabitants. Despite having only two marinas, its smaller population contributes to this high ratio.
- La Gomera stands out as the island with the highest berth density, offering 44.9 berths per 1,000 inhabitants across four marinas. This is the highest ratio among all the islands, highlighting the importance of marina infrastructure relative to its population.
- La Palma provides 8.6 berths per 1,000 inhabitants, with three marinas serving its population.
- Lanzarote follows closely with 9.3 berths per 1,000 inhabitants, supported by its four marinas.
- Fuerteventura offers 6.4 berths per 1,000 inhabitants, balancing its population and marina infrastructure with four marinas.
- Gran Canaria, with the largest total number of berths (2,596), has a relatively low ratio of 3.0 berths per 1,000 inhabitants due to its high population.
- Tenerife, despite having seven marinas and a significant number of berths (1,804), has the lowest berth-per-capita ratio at 1.8 berths per 1,000 inhabitants, given its population size.

Table 35. Number of berths per capita in the Canary Islands

Island	Total Marinas	Total Berths	Population	Berth per capita (x 1000)
El Hierro	2	240	11,147	21.5
Fuerteventura	4	785	122,629	6.4
Gran Canaria	6	2,596	870,595	3.0
La Gomera	4	974	21,678	44.9
La Palma	3	701	81,863	8.6
Lanzarote	4	1,446	156,189	9.3
Tenerife	7	1,804	1,017,531	1.8
<b>Total</b>	<b>30</b>	<b>8,546</b>	<b>2,281,632</b>	<b>3.7</b>

Source: Own elaboration

This analysis shows that smaller islands such as La Gomera and El Hierro have a much higher concentration of berths relative to their populations, emphasizing their role as key locations for nautical activities despite their smaller size. Conversely, more populous islands like Tenerife and Gran Canaria focus on accommodating higher numbers of residents and visitors while maintaining marina infrastructure.

These marinas are generally equipped with amenities such as water and electricity supply, fuel, shipyards, cranes, repair workshops, nautical shops, restaurants, and commercial areas, providing a comprehensive experience for sailors.

Figure 44. Main marinas in the Canary Islands





#### 9.5.2.2 Marinas in Azores

The Azores archipelago boasts a total of **13 marinas**, strategically located across its islands to cater to sailors and tourists. Together, these marinas provide a combined capacity of **2,176 berths**, offering a range of facilities and services that accommodate both small recreational boats and larger vessels. This infrastructure highlights the importance of the Azores as a key nautical destination in the mid-Atlantic.

The Azores archipelago features a total of 2,176 berths across its islands, distributed among marinas with varying capacities. São Miguel leads with 810 berths, representing 37% of the total, spread across three marinas, including the largest, Marina de Ponta Delgada (640 berths). Terceira follows with 540 berths (25%), supported by Marina do Angra do Heroísmo and Marina da Praia da Vitória. Faial contributes 300 berths (14%) from its iconic Marina da Horta.

Pico offers 231 berths (11%) across two marinas, while Flores provides 90 berths (4%) through Marina das Lajes and Marina de Santa Cruz. Santa Maria has 120 berths (6%) from Marina do Vila do Porto. São Jorge contributes 77 berths (4%) via Marina das Velas, and Corvo, the smallest island, offers 8 berths, accounting for less than 1% of the total. These figures emphasize São Miguel and Terceira as the main nautical hubs in the Azores, while smaller islands ensure connectivity and accessibility for local and visiting vessels.



Table 36. Marinas in Azores

Number	Marina Name	Island	Number of Berths	Percentage of Total
1	Marina do Ponta Delgada	São Miguel	640	29%
2	Marina da Vila Franca do Campo	São Miguel	120	6%
3	Marina do Lagoa	São Miguel	50	2%
	<b>São Miguel Total</b>		<b>810</b>	<b>37%</b>
4	Marina do Angra do Heroísmo	Terceira	330	15%
5	Marina da Praia da Vitória	Terceira	210	10%
	<b>Terceira Total</b>		<b>540</b>	<b>25%</b>
6	Marina da Horta	Faial	300	14%
	<b>Faial Total</b>		<b>300</b>	<b>14%</b>
7	Marina das Lajes das Flores	Flores	60	3%
8	Marina de Santa Cruz das Flores	Flores	30	1%
	<b>Flores Total</b>	<b>Flors</b>	<b>90</b>	<b>4%</b>
9	Marina do São Roque do Pico	Pico	148	7%
10	Marina da Madalena	Pico	83	4%
	<b>Pico Total</b>		<b>231</b>	<b>11%</b>
11	Marina das Velas	São Jorge	77	4%
	<b>São Jorge Total</b>		<b>77</b>	<b>4%</b>
12	Marina da Vila do Porto	Santa Maria	120	6%
	<b>Santa Maria</b>		<b>120</b>	<b>6%</b>
13	Marina da Vila do Corvo	Corvo	8	0%
	<b>Corvo Total</b>		<b>8</b>	<b>0%</b>
	<b>Overall Total</b>	<b>All Islands</b>	<b>2,176</b>	<b>100%</b>

Source: Own elaboration

- **Marina da Ponta Delgada** (São Miguel, Ponta Delgada): With 640 berths, this marina is the largest in the Azores, promoting whale watching, diving, and access to São Miguel's vibrant capital with its historic and cultural attractions.
- **Marina da Vila Franca do Campo** (São Miguel, Vila Franca do Campo): Offering 120 berths, it is known for its proximity to the Ilhéu de Vila Franca, a natural swimming pool and popular snorkelling and diving destination.
- **Marina do Lagoa** (São Miguel, Lagoa): This small marina has 50 berths and promotes kayaking and coastal fishing experiences, alongside scenic views of the southern coastline.
- **Marina da Angra do Heroísmo** (Terceira, Angra do Heroísmo): With 330 berths, this marina is situated in a UNESCO World Heritage Site, offering access to historic underwater wreck diving and cultural exploration.



- **Marina da Praia da Vitória** (Terceira, Praia da Vitória): Hosting 210 berths, it is known for its spacious bay, ideal for sailing, windsurfing, and other water sports.
- **Marina da Horta (Faial, Horta)**: A transatlantic hub with 300 berths, it promotes whale watching, diving in underwater volcanic features, and the famous painted murals left by sailors.
- **Marina das Lajes das Flores** (Flores, Lajes das Flores): With 60 berths, this marina offers nature-focused activities like hiking coastal trails and exploring sea caves and cliffs.
- **Marina de Santa Cruz das Flores** (Flores, Santa Cruz das Flores): A smaller marina with 30 berths, it promotes eco-tourism, including kayaking and birdwatching around Flores' dramatic coastal landscapes.
- **Marina do São Roque do Pico** (Pico, São Roque): Offering 148 berths, it is a key spot for whale watching tours and access to Mount Pico's trails, combined with local fishing experiences.
- **Marina da Madalena** (Pico, Madalena): With 83 berths, this marina supports whale watching, diving, and exploring the unique volcanic vineyards of Pico.
- **Marina das Velas** (São Jorge, Velas): Featuring 77 berths, it offers access to São Jorge's famous "fajãs" (coastal plains) and promotes activities like surfing and paddleboarding.
- **Marina da Vila do Porto** (Santa Maria, Vila do Porto): This marina with 120 berths promotes recreational fishing, scuba diving, and beach activities along Santa Maria's sandy coastline.
- **Marina da Vila do Corvo** (Corvo, Vila do Corvo): The smallest marina with 8 berths, it focuses on eco-tourism, offering boat tours to explore the island's unique volcanic crater and marine biodiversity.

These marinas also provide water and electricity supply, fuel, shipyards, repair workshops, nautical shops, and restaurants, ensuring a comfortable stay for sailors or local residents users of such infrastructures.

The Azores archipelago offers a total of 2,176 berths distributed across its islands, with variations in marina sizes and capacities. São Miguel, the largest island, provides 810 berths across three marinas, with an average size of 270 berths, and its largest facility is Marina da Ponta Delgada (640 berths). Terceira offers 540 berths across two marinas, averaging 270 berths, with its largest being Marina da Angra do Heroísmo (330 berths). Faial has a single marina, Marina da Horta (300 berths), which serves as its largest and only marina.

Pico provides 231 berths in two marinas, averaging 116 berths per marina, with its largest being Marina do São Roque do Pico (148 berths). Flores offers 90 berths across two marinas, with an average size of 45 berths, and its largest is Marina das Lajes das Flores (60 berths). Santa Maria has 120 berths in its only marina, Marina de Vila do Porto (120 berths). São Jorge features a single marina, Marina das Velas (77 berths), while Corvo, the smallest island, has just

8 berths in Marina de Vila do Corvo, its sole facility. These figures reflect São Miguel and Terceira as the primary hubs for nautical activities in the Azores, supported by the iconic Marina da Horta in Faial.

#### Number and averaged size of Marinas in Azores

Island	Total Marinas	Total Berths	Average Size of Marinas	Largest Marina (Berths)
São Miguel	3	810	270	640
Terceira	2	540	270	330
Faial	1	300	300	300
Flores	2	90	45	60
Pico	2	231	116	148
São Jorge	1	77	77	77
Santa Maria	1	120	120	120
Corvo	1	8	8	8
<b>Total of these islands</b>	<b>13</b>	<b>2,176</b>	<b>167</b>	<b>300</b>

Source: Own elaboration

In the Azores, the number of berths per capita varies across the islands, reflecting differences in population and maritime infrastructure. São Miguel, the most populous island, has 810 berths across three marinas, equating to 5.9 berths per 1,000 inhabitants. Terceira offers 540 berths in two marinas, with a higher ratio of 9.6 berths per 1,000 inhabitants. Faial, with its single marina, has 300 berths and a notably high ratio of 20.0 berths per 1,000 inhabitants.

Flores, despite its small size, boasts 24.5 berths per 1,000 inhabitants across two marinas, with 90 berths in total. Pico, with 231 berths in two marinas, has 16.9 berths per 1,000 inhabitants, while São Jorge provides 9.2 berths per 1,000 inhabitants from its single marina of 77 berths. Santa Maria, with 120 berths in one marina, has an impressive ratio of 21.6 berths per 1,000 inhabitants. Lastly, Corvo, the smallest and least populated island, has 8 berths in its sole marina, equating to 20.8 berths per 1,000 inhabitants. Overall, the Azores have an average of 8.9 berths per 1,000 inhabitants, highlighting the significance of maritime infrastructure in supporting the region's nautical activities and tourism.

Table 37. Number of berths per capita in Azores

Island	Total Marinas	Total Berths	Population	Berth per capita (x 1000)
São Miguel	3	810	137,856	5,9
Terceira	2	540	56,437	9,6
Faial	1	300	14,994	20,0
Flores	2	90	3,673	24,5
Pico	2	231	13,645	16,9
São Jorge	1	77	8,373	9,2

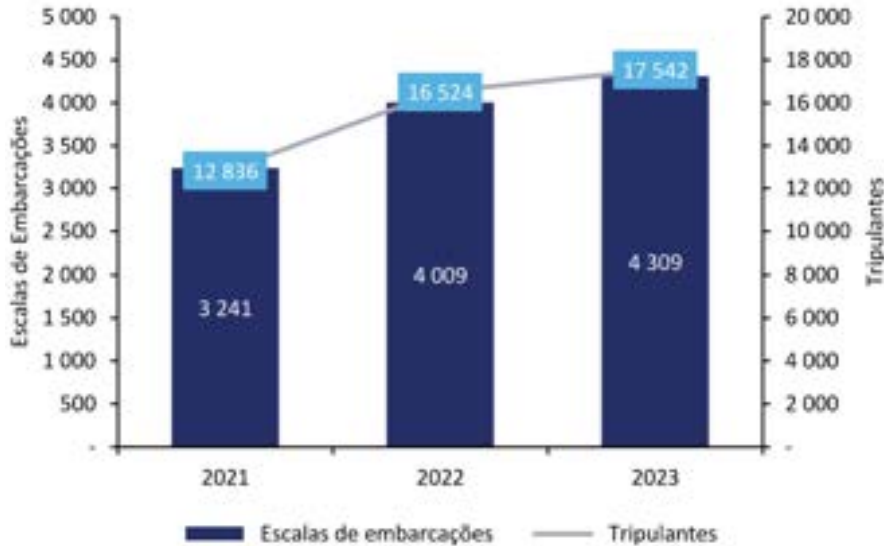
Island	Total Marinas	Total Berths	Population	Berth per capita (x 1000)
Santa Maria	1	120	5,552	21,6
Corvo	1	8	384	20,8
<b>Total of these islands</b>	<b>13</b>	<b>2176</b>	<b>245,005</b>	<b>8,9</b>

Source: Own elaboration

In the recreational boating business segment, it is important to highlight the recovery trajectory that began in 2021 in Azores, almost reaching the average values recorded in previous years. It is worth mentioning that the average number of crew members per vessel over the three-year period has remained at four, which indicates that the size of the vessels docking at marinas has remained practically unchanged.

This chart illustrates the evolution of recreational boat stopovers and the number of crew members from 2021 to 2023, showing a steady recovery in the sector. The number of stopovers increased from 3,241 in 2021 to 4,009 in 2022 (+23.7%) and 4,309 in 2023 (+7.5%), indicating consistent growth, though at a slower pace in the last year. Similarly, the number of crew members rose from 12,836 in 2021 to 16,524 in 2022 (+28.7%) and 17,542 in 2023 (+6.2%), reflecting a proportional increase in nautical activity. The average of four crew members per vessel remained stable over the three years, suggesting no significant changes in vessel capacity. Overall, the data confirms a strong recovery in the recreational boating industry, with figures approaching pre-peak levels (2018), signalling a positive trend for the sector.

Figure 45. Number of stopovers and crew members of recreational vessels in Azores



Source: Porto dos Azores S.A.<sup>25</sup>

<sup>25</sup> Porto dos Azores S.A.. Relatório & Contas (2023). Available on <https://portosdosacores.pt/wp-content/uploads/2024/04/Relatorio-e-Contas-2023.pdf>

The breakdown and evolution of the number of vessels in port calls and crew on board in recent years, for each of the ports managed by Porto dos Açores S.A., can be seen in the following table.

Table 38. Number of berths per capita in Azores

Recreational Port	2021 Vessels	2021 Crew	2022 Vessels	2022 Crew	2023 Vessels	2023 Crew	Var. % Vessels 23/22	Var. % Crew 23/22
Nautical Recreational Center of Vila do Porto	453	1,471	454	1,508	560	1,728	23.35	14.59
Ponta Delgada Marina	616	2,256	981	3,476	1,007	3,501	2.65	0.72
Angra do Heroísmo Marina	422	1,622	503	1,806	552	2,154	9.74	19.79
Nautical Recreational Center of Velas	558	2,108	558	2,041	613	2,449	9.86	19.99
Nautical Recreational Center of Lajes do Pico	126	514	138	548	126	540	-8.7	-1.46
Horta Marina	1,066	4,865	1,375	7,145	1,451	7,170	5.53	0.35
<b>Total</b>	<b>3,241</b>	<b>12,836</b>	<b>4,009</b>	<b>16,524</b>	<b>4,309</b>	<b>17,542</b>	<b>7.48</b>	<b>6.16</b>

Source: Porto dos Azores S.A.<sup>25</sup>

Figure 46. Main marinas in Azores



### 9.5.2.3 Marinas in Madeira

The marinas in Madeira and Porto Santo collectively offer a total of 1,001 berths, showcasing a well-distributed network of nautical infrastructure in the region. Madeira itself accounts for the

majority, with 891 berths spread across four marinas, representing 89% of the overall capacity. Among these, Marina da Calheta is the largest, providing 337 berths, or 34% of the total, followed by Marina da Quinta do Lorde with 264 berths (26%), and Marina do Funchal with 210 berths (21%). Porto de Recreio de Machico, with 80 berths, contributes 8%.

On Porto Santo, two marinas add another 220 berths to the region's capacity, representing 22% of the total. Marina do Porto Santo, the larger of the two, offers 140 berths (14%), while Porto de Abrigo de Porto Santo provides 80 berths (8%). Together, these facilities demonstrate a strategic allocation of berths to cater to both local and transitory nautical needs across the islands.

Table 39. Marinas in Madeira

Number	Marina Name	Island	Number of Berths	Percentage of Total
1	Marina do Funchal	Madeira	210	21%
2	Marina da Calheta	Madeira	337	34%
3	Marina da Quinta do Lorde	Madeira	264	26%
4	Porto de Recreio de Machico	Madeira	80	8%
Total Madeira			891	89%
5	Marina do Porto Santo	Porto Santo	140	14%
6	Porto de Abrigo de Porto Santo	Porto Santo	80	8%
Total Porto Santo			220	22%
Overall Total			1,001	100%

Source: Own elaboration

Here is the consolidated list of marinas in Madeira, with a brief description:

- **Marina do Funchal** (Funchal, Madeira Island): Located in the capital city, this marina offers 210 berths and serves as a hub for maritime tourism, including sailing excursions and dolphin-watching tours.
- **Marina da Calheta** (Calheta, Madeira Island): Situated on the southwest coast, it provides 337 berths and is known for its proximity to sandy beaches and water sports facilities, such as jet skiing and diving.
- **Marina da Quinta do Lorde** (Caniçal, Madeira Island): This marina features 264 berths and is part of a luxury resort complex, offering yacht services and promoting activities like sailing and fishing.
- **Marina do Porto Santo** (Vila Baleira, Porto Santo Island): Offering 140 berths, it serves as the main marina on Porto Santo Island, facilitating access to its renowned sandy beaches and clear waters, ideal for snorkelling and diving.

- **Porto de Recreio de Machico** (Machico, Madeira Island): This small recreational harbour has a capacity for 80 berths, providing basic services for leisure boats and supporting activities like sport fishing and boat tours.
- **Porto de Abrigo de Porto Santo** (Vila Baleira, Porto Santo Island): While primarily a shelter port, it offers additional berthing options for both small and large vessels, complementing the Marina do Porto Santo and supporting beach and snorkelling activities.

Madeira and Porto Santo collectively host six marinas, offering a total of 1,111 berths. Madeira, with four marinas, accounts for the majority of the berths (891), averaging 223 berths per marina. The largest marina in Madeira is Marina da Calheta, with 337 berths, showcasing its significant capacity compared to others in the region.

In Porto Santo, two marinas contribute a total of 220 berths, with an average size of 110 berths per marina. The largest marina on the island, Marina do Porto Santo, offers 140 berths. This distribution highlights Madeira's dominant position in terms of berth capacity while also emphasizing Porto Santo's complementary role in the region's nautical infrastructure.

Table 40. Number and averaged size of Marinas in Madeira

Island	Total Marinas	Total Berths	Average Size of Marinas	Largest Marina (Berths)
Madeira	4	891	223	337
Porto Santo	2	220	110	140
<b>Total</b>	<b>6</b>	<b>1,111</b>	<b>185</b>	<b>337</b>

Source: Own elaboration

Madeira and Porto Santo display notable differences in the distribution of marinas and berths relative to their populations. Madeira, with 4 marinas and 891 berths, serves a population of 251,060, resulting in a berth-to-population ratio of 3.5 berths per 1,000 inhabitants. This reflects a moderate provision of nautical infrastructure to support both local and visiting boaters.

Porto Santo, despite its smaller size and population of 5,483, has 2 marinas offering a total of 220 berths. This results in a remarkable ratio of 40.1 berths per 1,000 inhabitants, far exceeding that of Madeira. This high berth density emphasizes Porto Santo's strategic focus on nautical tourism, making it a significant hub for boating activity in the region despite its smaller population and infrastructure.

Table 41. Number of berths per capita in Madeira

Island	Total Marinas	Total Berths	Population	Berth per capita (x 1000)
Madeira	4	891	251,060	3.5
Porto Santo	2	220	5,483	40.1
<b>Total</b>	<b>6</b>	<b>1,111</b>	<b>256,543</b>	<b>4.3</b>

Source: Own elaboration



Figure 47. Main marinas in Madeira




#### 9.5.2.4 Marinas in Martinique

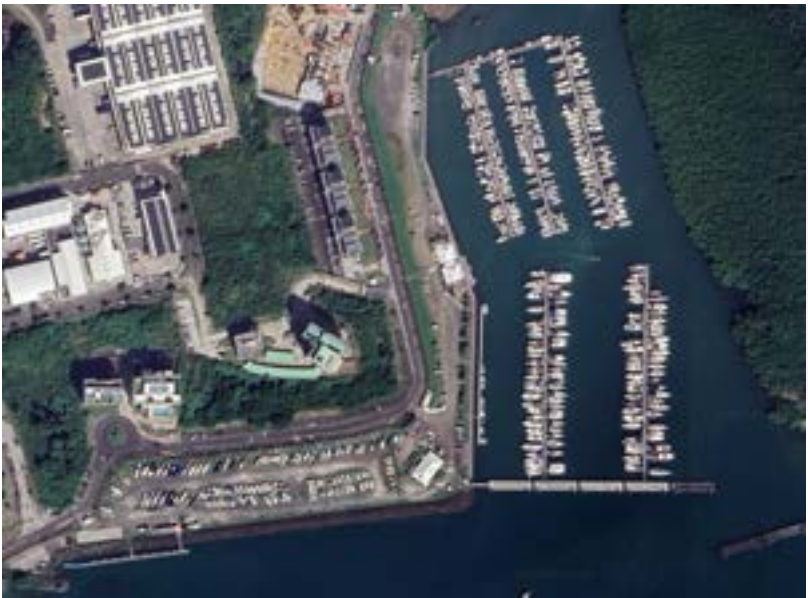

In Martinique, there are at 6 main marinas or yacht harbours. Namely:

- **Marina du Marin**, located in the town of Le Marin on the southern coast of Martinique, is the largest marina on the island and one of the most significant in the Caribbean. It boasts a capacity of 1,211 berths, accommodating vessels up to 60 meters in length. The marina offers a wide range of services, including water and electricity at every berth, fuel stations, Wi-Fi access, and repair facilities. Additionally, it provides amenities such as restaurants, shops, and a supermarket to meet the needs of sailors and visitors. Renowned for its excellent infrastructure and strategic location, Marina du Marin serves as a key hub for recreational boating and yacht charters in the region.
- **Marina de l'Étang Z'Abricots**, located in Fort-de-France, Martinique, is the island's second-largest marina, accommodating up to 425 boats ranging from 6 to 25 meters in length. In addition to its wet berths, the marina features a dry storage area, providing space for approximately 150 vessels. This facility offers a variety of services, including water and electricity at each berth, a fuel station, Wi-Fi access, a laundromat, and on-site dining options. Strategically positioned just 15 minutes from both the city centre and the airport, the marina provides secure mooring in a setting that harmoniously blends the surrounding mangrove with the urban landscape.

- **Marina du Robert - Port à sec Petite France**, located in Le Robert, Martinique, has a total capacity for 200 vessels, most of which are accommodated in a dry storage marina. It also offers 30 water berths for boats up to 40 feet in length, with a draft of up to 1.5 meters. Situated at the end of the bay and protected by dense mangroves, it provides excellent shelter for vessels during adverse weather conditions. Additional services include a careening area, facilities for boat renovation and repair, a restaurant ("La Voile"), accommodations, a mini-market, and a fuel station.
- **Marina Pointe du Bout**, located in Les Trois-Îlets, offers a capacity of 130 berths, providing facilities and convenient access to nearby tourist attractions and beaches.
- **Marina Fort-de-France**, also known as Caren Antilles Boatyard, is located in the municipality of Fort-de-France, Martinique. It offers 108 berths for boats up to 20 meters in length with a maximum draft of 5 meters, providing services such as electricity and water at the berths, as well as dressing rooms and showers. It is situated close to Marina du Marin, serving as a complementary facility to the island's largest marina by providing additional berths and support services.
- **Marina du François**, located in the town of Le François on Martinique's east coast, shares its space with traditional fishing activities, which remain the primary function of this port. Additionally, it offers 35 berths dedicated to recreational boating, providing a balance between the island's maritime heritage and its nautical tourism sector.



Table 42. Marinas in the Martinique

Marina	Location	Number of Berths
Marina du Marin		1.211

<p>Etang Z'abricots</p>		<p>425 (150 in dry storage area)</p>
<p>Marina du Robert - Port à sec Petite France</p>		<p>30 (200 in dry storage area)</p>





<p>Marina Pointe du Bout</p>		<p>130</p>
<p>Marina Fort-de-France (Caren Antilles Boatyard)</p>		<p>108</p>



Apart from that, there are at least 87 anchorage areas and several available moorings in minor infrastructures which cannot really be considered as really marinas.

In summary, Martinique marina facilities amount a total of 6 marinas offering a combined capacity of 1,939 berths. The average size of these marinas is 323 berths. The largest marina on the island, Marina du Marin, dominates with 1,211 berths, making it not only the largest in Martinique but also a key hub for nautical activities in the Caribbean.

Table 43. Number and averaged size of Marinas in the Martinique

Island	Total Marinas	Total Berths	Average Size of Marinas	Largest Marina (Berths)
Martinique	6	1,939	323	1,211

Source: Own elaboration

These marinas and anchorages offer a variety of services for sailors and are key points for exploring the Caribbean waters of Martinique and key facilitator of other activities within the scope of this report.

With a total of 1,939 berths available across the island's six marinas, this results in a ratio of approximately 5.3 inhabitants per berth, highlighting the significant nautical infrastructure in relation to the local population.

Table 44. Number of berths per capita in the Martinique

Island	Total Marinas	Total Berths	Population	Berth per capita (x 1000)
Martinique	4	891	251,060	3.5

Source: Own elaboration

### 9.5.3 Facilities for Megayachts

The emergence of megayachts as a distinct and growing segment within the recreational nautical sector highlights their significant role in the blue economy. Megayachts, typically

defined as luxury vessels exceeding 24 meters in length, represent a high-value market that drives substantial economic activity across a wide range of associated industries. This sector not only enhances the profile of recreational boating but also establishes a ripple effect across tourism, hospitality, and marine services, contributing to the sustainable development of coastal economies.

One of the key impacts of the megayacht segment is its ability to attract affluent clientele, whose expenditures significantly benefit local businesses and communities. These vessels often require specialized marina facilities, creating opportunities for the development of high-capacity berths, advanced maintenance services, and exclusive amenities. The construction, operation, and upkeep of these vessels generate skilled employment in shipbuilding, marine engineering, and professional crew services.

Moreover, megayachts are instrumental in promoting luxury tourism, linking destinations and driving demand for premium services such as gourmet dining, private excursions, and bespoke experiences like secluded island visits or cultural tours. Their presence often acts as a catalyst for the development of high-end tourism infrastructure, including boutique hotels, gourmet restaurants, and luxury retail, amplifying the economic impact of the sector.

In the context of the blue economy, megayachts also have the potential to adopt sustainable practices, such as advanced waste management systems, energy-efficient propulsion, and participation in marine conservation initiatives. These elements align the megayacht industry with broader goals of sustainability and environmental stewardship, reinforcing its compatibility with the principles of the blue economy.

As part of the recreational nautical subsector, megayachts enhance the attractiveness and competitiveness of marina destinations, particularly those positioned along key transoceanic routes like Macaronesia. By integrating the megayacht market into the broader framework of the blue economy, this segment not only drives economic diversification but also reinforces the importance of sustainable ocean-based industries for long-term growth and prosperity.

The megayacht sector in the Region remains underdeveloped compared to prominent Mediterranean destinations such as Barcelona, Málaga, Monaco, and renowned Italian ports like Porto Cervo or Genoa. While these territories benefit from a strategic location for transatlantic crossings and a growing reputation for nautical tourism, the infrastructure and services specifically tailored for megayachts are less extensive than those found in the Mediterranean. This disparity is evident in the limited number of large-scale marinas equipped to accommodate vessels over 50 meters, as well as the comparatively fewer luxury-focused amenities and specialized services for owners and crews. Despite this, the Canary Islands present significant growth potential, offering a unique blend of year-round mild weather, pristine waters, and proximity to emerging Atlantic yachting routes.

In the region, the most significant marinas equipped to accommodate large-scale vessels and megayachts. Below is an overview of notable facilities in each area:

#### **The Canary Islands:**



- **Marina Santa Cruz (Tenerife):** Located in the port of Santa Cruz de Tenerife, this marina offers facilities for large yachts and this marina is strategically positioned for transatlantic crossings.
- **Puerto Calero (Lanzarote):** Known for its capacity to host superyachts, Puerto Calero provides comprehensive services tailored to the needs of megayacht owners and crews.
- **Marina La Palma (La Palma):** Managed by Puerto Calero, this marina offers facilities suitable for large vessels, contributing to the island's nautical tourism sector.

#### **Madeira:**

- **Marina do Funchal:** Situated in the capital city, this marina has 210 berths and can accommodate vessels up to 20 meters in length, serving as a hub for both local and visiting yachts.
- **Marina da Calheta:** With 337 berths, it is one of the largest in Madeira, offering services for a range of vessels, including larger yachts.
- **Marina da Quinta do Lorde:** This facility provides 264 berths and caters to yachts up to 50 meters, offering modern amenities and services.

#### **Azores:**

- **Marina do Ponta Delgada (São Miguel):** As the largest marina in the Azores, it offers 670 berths and can accommodate vessels up to 50 meters, serving as a key stopover for transatlantic voyages.
- **Marina da Horta (Faial):** Known for its rich maritime history, this marina provides 300 berths and is a popular destination for yachts crossing the Atlantic.

These marinas are integral to the region's nautical infrastructure, supporting both local maritime activities and international yachting traffic. Their facilities cater to the specific needs of large-scale vessels and megayachts, contributing to the development of the blue economy in Macaronesia.

#### **Martinique:**

- **Marina du Marin:** Located in the south of Martinique, this is one of the largest marinas in the Caribbean, offering over 750 berths and facilities for yachts up to 60 meters. It is known for its excellent repair services and vibrant sailing community.

- **Port de Fort-de-France:** Situated in the island's capital, this marina caters to both local and visiting yachts, offering essential services and convenient access to the city's amenities.
- **Marina de l'Étang Z'Abriquets:** Located near Fort-de-France, this modern facility provides 340 berths and can accommodate vessels up to 50 meters. It is a favourite for superyacht owners due to its proximity to the international airport and advanced services.

As can be observed in the accompanying photographs below, the superyacht sector currently lacks infrastructure comparable to that of other regions. The largest vessels in this segment are often forced to dock in commercial piers, where they do not have access to the specialized services and amenities typically expected by this market and its high-demand clientele. This shortfall highlights a significant growth opportunity for the region, positioning the superyacht industry as a potential vector of economic development. However, capitalizing on this potential will require substantial investment in tailored marina infrastructure, luxury facilities, and services designed to meet the standards of superyacht owners and their guests.

Figure 48. Superyachts facilities in the Region





#### 9.5.4 The nautical charter

Nautical chartering refers to the practice of renting or leasing boats or vessels for recreational, commercial, or transport purposes. In this context, "charter" means that an individual, group, or company hires a vessel, such as yachts, sailboats, or catamarans, for a specific period that can range from few hours to several weeks. This service allows people to experience the joys of navigating waterways without owning a boat, making it accessible to a broader audience.

Nautical chartering serves a variety of purposes. Most of the people use it for tourism, exploring stunning maritime destinations like islands, reefs, and coastlines. Others charter vessels for private events, such as weddings or parties, where the open water provides a unique backdrop. Sport fishing enthusiasts often charter boats equipped with specialized gear for fishing trips, while businesses may use chartered vessels for corporate purposes, such as meetings, employee incentives, or promotional events.

The benefits of nautical chartering are significant. It offers unparalleled freedom to customize routes and activities, ensuring a tailored experience. Clients can choose between luxurious or adventurous settings, depending on their preferences. Additionally, the flexibility in selecting the type of vessel and level of service means there is an option to suit every need and budget. Nautical chartering is particularly popular in destinations known for their breathtaking coastlines, such as the Caribbean, the Mediterranean, and Southeast Asia.

##### 9.5.4.1 Structure of the offer

The structuring of nautical charter offerings revolves around providing a comprehensive and customizable experience tailored to meet the diverse preferences of clients. Companies focus on delivering flexibility and variety through well-defined categories such as vessel types, rental modalities, additional services, and rental durations. By offering a range of vessels they cater to different levels of comfort, adventure, and budget. Rental options further enhance this flexibility, accommodating both seasoned sailors and those seeking a fully serviced experience. Complementary services while adaptable charter durations allow clients to enjoy anything from a day trip to a multi-week adventure. This carefully curated approach ensures an unparalleled nautical experience that resonates with a wide array of customer needs and expectations.

- **Types of vessels:** Nautical charter companies offer a variety of vessels to suit different preferences and needs. **Sailboats** are particularly popular due to their balance of cost and space, especially those measuring around 12 meters, which are in high demand. **Motorboats** are perfect for fast transfers and engaging in sports activities. **Catamarans**, with their superior stability and spaciousness, are a favourite among groups and families looking for comfort. For clients seeking the utmost luxury, **high-end yachts** provide an unparalleled experience with all the amenities and services one might desire.
- **Rental modalities:** The flexibility of rental options allows clients to choose the experience that best suits them. There are two main types of nautical chartering. The first is **crewed charter**, where the vessel comes with a professional crew, including a captain, chef, and other staff. These professionals manage the boat's operation and attend passengers, ensuring a seamless and enjoyable experience. This option is commonly associated with luxury yachts or larger vessels and is ideal for those who prefer to relax and leave the technical aspects of navigation to experts. The second type is **bareboat charter**, which involves renting a vessel without a crew. In this case, the client assumes full responsibility for operating the boat. Typically, this option requires the client to possess the necessary licenses and certifications. Bareboat charters are particularly appealing to experienced sailors who want the freedom to create their own itineraries and enjoy a hands-on adventure.
- **Additional services:** To enhance the nautical experience, companies offer a range of supplementary services. Clients can access sports **equipment for activities** like snorkelling, paddleboarding, fishing, or water skiing. **Onboard catering** ensures that meals and drinks are tailored to individual tastes and dietary preferences. **Personalized itineraries** allow clients to explore routes designed to their interests, while **transportation and reservation services** make organization seamless, from port transfers to securing bookings at exclusive destinations.
- **Rental duration:** Charters are available in various durations to match the client's schedule and needs. **Day charters** are ideal for short trips or celebrations, providing a quick and enjoyable escape. **Weekend charters** are great for short breaks, offering a chance to unwind. For those seeking extended adventures, **weekly or longer charters** enable travellers to explore multiple destinations at a leisurely pace, enjoying everything the sea has to offer.

#### 9.5.4.2 Sector evolution

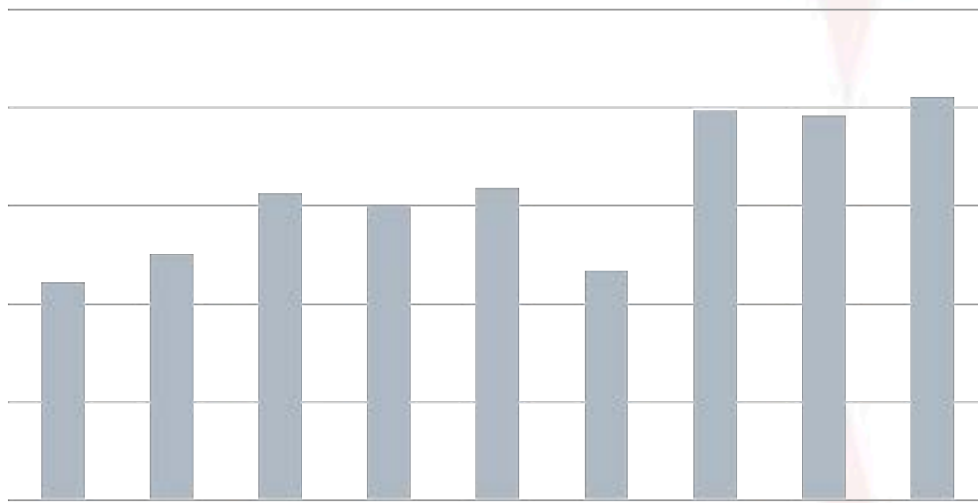
The following chart shows the evolution of the number of registered boats for nautical chartering in Spain from 2015 to 2023. Over this period, there is a clear upward trend, reflecting the growing interest in this activity and its economic significance in the country.

In 2015, 1,112 registrations were recorded, and since then, the number has steadily increased, reaching an estimated 2,057 in 2023. This growth experienced a temporary setback in 2020 due to the COVID-19 pandemic, when registrations dropped to 1,174. However, the sector

demonstrated a strong recovery starting in 2021, with a remarkable increase that highlights the resilience and dynamism of nautical chartering in Spain.

This chart not only illustrates the positive evolution of the sector but also underscores the significant potential it represents in the area of Study with extensive coastlines and major tourist appeal. The sustained growth in registrations shows how nautical chartering contributes to the economic development of coastal areas by boosting tourism, creating jobs, and attracting investment. This trend highlights the importance of chartering as a driver of growth for the maritime and tourism industries in the region.

Figure 4. Number of boats registered by nautical chartering in Spain. Evolution 2015- 2023



Source: Statista<sup>26</sup>

### 9.5.4.3 Operators in the sector

The Canary Islands offer a diverse range of nautical charter companies catering to various preferences and needs. Here are some relevant options:

Table 45. Nautical Chartering in the Canary Island

Source Region	Description	Location
CC Yacht	Local company specializing in boat rentals in the Canary and Balearic Islands, offering a wide range of vessels and personalized services for sailors.	Operates across major marinas in the Canary Islands and Balearic Islands.

<sup>26</sup> Available at <https://es.statista.com/estadisticas/793013/numero-anual-de-matriculaciones-de-embarcaciones-de-recreo-pa-ra-alquiler-en-espana/>

Source Region	Description	Location
Dream Yacht Charter	Offers yacht, catamaran, and boat rentals in Tenerife, with options for skippered or bareboat charters to explore the islands.	Based in Tenerife, mainly in Puerto Colón and Marina del Sur.
Nautic Adventure	Specializes in the rental of sailboats, catamarans, and motor yachts in the Canary Islands, catering to various needs.	Operates in marinas across Tenerife and Gran Canaria, including Marina San Miguel.
The Canary Islands Marine	Provides a fleet of luxury motorboats and speedboats for charter, with options for skippered or bareboat rentals from Puerto Colón, Playa de las Américas.	Puerto Colón Marina, Playa de las Américas (Tenerife).
Ocean Charter Club	Based in Gran Canaria, this company offers private boat charters with a rich history spanning three generations of nautical experience.	Pasito Blanco Marina, Gran Canaria.
Click&Boat	Offers a wide selection of boats, including sailboats, motorboats, and catamarans, with options for skippered or bareboat charters in the Canary Islands.	Operates in various marinas across the Canary Islands, including Puerto Colón and Marina Lanzarote.
SamBoat	Provides over 185 boats for rent in the Canary Islands, offering flexible options with or without a license for different sailing levels.	Services available in key marinas in Tenerife, Gran Canaria, and Lanzarote.
Oceans Evasion	Offers a variety of boats for rent, including sailboats, catamarans, and motor yachts, with additional crew services and tailored experiences available.	Operates in marinas across Madeira and the Canary Islands.
AlexBoats	A platform showcasing rental companies in the Canary Islands, offering jet skis, motorboats (licensed and unlicensed), sailboats, catamarans, and skippered yachts.	Works with multiple marinas across the Canary Islands, including Marina Rubicón and Puerto Colón.
Chart2be	Offers a wide range of motor and sailing boats, as well as a fleet of luxury yachts across the Canary and Balearic Islands.	Services available in key marinas in the Canary and Balearic Islands.
Rent Boat Tenerife	Specializes in hourly rentals of catamarans, sailboats, yachts, and motorboats without a skipper in various locations in Tenerife.	Mainly operates in Puerto Colón and Marina San Miguel (Tenerife).
Club Canary	Facilitates boat rentals in Gran Canaria, offering options for parties, adventures, or relaxation, with a flexible cancellation policy.	Services offered in Pasito Blanco Marina, Gran Canaria.
Sailing Europe	Provides boat rentals in the Canary Islands, ideal for vacations in the Atlantic Ocean, with online booking options.	Operates across marinas in Tenerife, Gran Canaria, and Lanzarote.
Scansail	Offers a selection of boats for rent in Las Palmas de Gran Canaria, with or without a skipper, and personalized service.	Based in Las Palmas Marina and other marinas in Gran Canaria.



Source Region	Description	Location
CC Yacht	Local company specializing in boat rentals in the Canary and Balearic Islands, offering a wide range of vessels and personalized services for sailors.	Operates across major marinas in the Canary Islands and Balearic Islands.

Source: *Own elaboration*

This table combines descriptions of the services with the locations and companies in Madeira and Azores.

Table 46. Nautical Chartering in Madeira

Company	Description	Location
Filovent	Offers boat rentals in Madeira with or without a skipper, including sailboats and catamarans, to explore the islands and their surroundings.	Mainly operates in Funchal Marina and Porto Santo Marina
Tom's Catch	Specializes in fishing trips in Madeira, providing fishing charters with different techniques and species, tailored to all skill levels	Departs from Calheta Marina and Funchal Marina
Madeira.Yachts	Provides luxury private charters with professional crews, including yachts, sailboats, and catamarans in Madeira and Porto Santo, directly from local owners.	Services available in Funchal Marina and Porto Santo Marina
GetMyBoat	A platform connecting users with boat owners in Madeira, offering a variety of rental options with hourly and daily pricing.	Works with various marinas in Madeira, including Funchal Marina and Calheta Marina.

Source: *Own elaboration*

Table 47. Nautical Chartering in Azores

Company	Description	Location
GlobeSailor	Offers a variety of boats for rent, including sailboats and catamarans, with or without a skipper, to explore the Azores islands.	Mainly operates in the marinas of Horta, Ponta Delgada, and Angra do Heroísmo.
12 Knots	Provides bareboat yacht rentals in the Azores, suitable for sailors of all levels, with a fleet of 18 boats available.	Main bases in Terceira (Marina d'Angra), Faial (Horta), and São Miguel (Ponta Delgada).
Click&Boat	A platform that connects users with boat owners in the Azores, offering rental options for motorboats, sailboats, catamarans, and yachts, with the option to hire a skipper.	Available in various marinas across the Azores, including Horta, Ponta Delgada, and Angra do Heroísmo.
GetMyBoat	A platform that facilitates boat rentals in the Azores, offering different types of vessels, from motorboats to sailboats, with hourly and daily rental options.	Operations in various locations, including Ponta Delgada and Vila Franca do Campo.
Filovent	Specializes in boat rentals with or without a skipper in the Azores Islands, offering a variety of boats for different needs.	Present in the main islands of the archipelago, including São Miguel and Faial.
Sailazores Yacht Charter	Offers yacht and sailboat rentals in the Azores, providing both bareboat and crewed options, ideal for exploring the archipelago.	Based in Horta, Faial Island.
Pure Sail - Yacht Charter Azores	A company dedicated to renting sailboats and yachts in the Azores, offering personalized sailing experiences with or without a skipper.	Mainly operates in Ponta Delgada, São Miguel.
Sailtours Yacht Charter	Provides sailboat and yacht rental services in the Azores, offering both crewed and bareboat charter options, tailored to customers' needs.	Located in Horta, Faial Island.

Source: Own elaboration

Finally, the following table summarizes some examples in the Martinique

Table 48. Nautical Chartering in the Martinique

Company	Description	Location
Skipper Antilles Charter	Skipper Antilles Charter is a family-run business passionate for the sea and sailing. It was founded by a sailing instructor in Brittany. It offers a team of skippers, cooks, and technicians, all driven by the sole ambition of making any cruise experience an exceptional experience.	Skipper Antilles Charter IS based on Marina du Marin, bassin n°2 (97290 Le Marin, Martinique)

Company	Description	Location
Punch Croisières	<p>Established 25 years, Punch Croisieres is a true reference in boat renting, either mono or multihulls.</p> <p>It has 18 boats have been carefully chosen for their seaworthiness. They are equipped for comfort and autonomy.</p> <p>Their reliability and equipment led them to be a benchmark either in short and long term rental.</p>	Port de plaisance - Boulevard Allègre (97290 Le Marin, Martinique)
SARL Kata Mambo	<p>With 18 years of experience, Kata Mambo specializes in organizing sea trips in catamarans.</p> <p>It offers day and half-day excursions in catamarans with crew, snacks and drinks and also experiences for the whole family including search of dolphins. They also offer in land experience as a complement of the nautical activities (excursions to the Savannah of Slaves<sup>27</sup> pf the Garden of Balata<sup>28</sup>)</p>	Rua Cha Cha, Marina Trois ilets (97229 Trois ilets, Martinique)
Cap Caravelle	<p>Cap Caravelle rents out a "Cap Camarat 6.50cc series 2" for a day or more from the marina in Le Robert.</p> <p>The Cap Camarat 6.50cc series 2 is a fast, stable, and multipurpose boat. It can accommodate up to 7 people. Equipped with a 150hp engine, it is equipped with an awning, a shower, a ski pole, a bathing ladder, nice benches, and a table.</p> <p>They also offer: wakeboard, water ski, and towed buoy (equipment available for hire in addition).</p>	It departs from marina in Le Robert

Source: Own elaboration

#### 9.5.4.4 Standard Pricing Scheme

In the **Canary Islands**, boat rental prices vary depending on the type of vessel, the duration of the rental, and the season.

<sup>27</sup> In a 3-hectare park, 400 years of Martinique's history to discover: reconstruction of an Amerindian village, visit of Rue Case-Nègres illustrating the way of life of slaves in the dwellings, and finally the way of life of rural inhabitants after abolition until 1960.

<sup>28</sup> It was in 1982 that Jean-Philippe Thoze, horticultourist, landscaper and artist at heart, returned to the footsteps of his childhood in his grandparents' Creole home. From there, a passion for botany was born that would take him to the four corners of the world.

- For small motorboats, hourly rates start at approximately €65, accommodating up to six people. Daily rentals for these boats are available from €130, depending on the size and onboard features.
- For larger motorboats, daily rates begin at €300 for vessels accommodating up to five people. Weekly rentals range from €2,000 to €6,000, with pricing influenced by the season and boat specifications.
- Sailboats, which are ideal for groups of six to eight people, typically cost around €450 per day. Weekly rates for these vessels range between €2,000 and €6,000, depending on the season and features of the boat.
- Catamarans, offering enhanced comfort and space, start at approximately €700 per day. Weekly rates for catamarans vary between €3,000 and €6,000, with prices influenced by the boat's size, amenities, and seasonal demand.
- Luxury yachts provide exclusive options for clients seeking premium experiences. Hourly rates for these vessels start at €220, accommodating up to ten passengers. Daily rates for luxury yachts begin at €1,100, with costs varying based on the level of luxury and additional services included.

In **Madeira**, boat rental prices are also very influenced by the type of vessel, rental duration, and seasonal demand.

- Motorboats typically have hourly rates starting at €50, with daily rentals ranging between €200 and €8,000, depending on factors such as the boat's size, features, and the season.
- Sailboats are a popular option, with half-day rentals (approximately 3 hours) costing around €350 and full-day rentals (6 hours) priced at about €700. For longer durations, weekly sailboat rentals start at €2,800, varying with the boat's specifications and the season.
- Catamarans offer additional comfort and space, with daily rental prices tailored to the boat's size and amenities. Weekly rentals for catamarans typically begin at €2,300, with adjustments based on seasonal and boat-specific factors.
- Luxury yachts cater to clients seeking premium experiences. Hourly rates for these vessels start at €220 and can accommodate up to 12 passengers. Daily rentals for luxury yachts are priced from €3,500, with variations reflecting the level of luxury and additional services included.

In the Azores, boat rental prices experiment the same dynamics:

- Sailboats: Sailboats are a popular option in the Azores, with daily rental prices ranging from €150 to €2,300, averaging around €580. Factors such as the season, the boat's year of construction, and additional equipment significantly influence these costs.
- Catamarans: While specific prices for catamarans are not clearly detailed in the available sources, these vessels typically have higher rates compared to sailboats due to their larger size and greater comfort. For precise pricing, it is recommended to contact rental companies directly.
- Motorboats: Daily rental rates for motorboats in the Azores start at approximately €290. Prices vary based on the size, engine power, and features of the boat.
- Luxury Yachts: Luxury yachts cater to clients seeking premium experiences, and their prices reflect this exclusivity. Although exact figures are not provided, luxury yachts are more expensive than other categories of vessels.
- These pricing ranges are indicative and subject to change based on variables such as seasonality, the vessel's age, and added services like skipper assistance, fuel, and water sports equipment.

In **Martinique and other French Caribbean islands**, boat rental prices also vary based on the type of vessel, duration of the rental, and seasonal demand. Below is an overview of typical price ranges for various categories of boats:

- Sailboat rentals in Martinique Daily rates for sailboats in Martinique typically range from €150 to €2,300, with an average around €600. These prices can fluctuate depending on factors such as the boat's age, equipment, and the time of year.
- Catamarans: In Martinique, catamaran rental prices vary depending on the size, model, season, and rental duration. Smaller catamarans typically range between €700 and €1,000 per day, while larger, more luxurious options can cost between €2,000 and €5,000 or more per day.
- Motorboats: For those interested in motorboats, half-day rentals in Martinique start at approximately €200, with full-day rates beginning around €300. Weekly rentals are available from about €1,500. Prices may vary based on the boat's size, power, and additional features.
- Luxury yacht charters in the Caribbean offer a premium experience, with weekly rates for motor yachts ranging from \$40,000 to over \$1.4 million, depending on the yacht's size, amenities, and the season.

IN summary, motorboat rentals are cheapest in Madeira, with hourly rates starting at €50 and daily rates beginning at €200. The Azores offer slightly higher daily starting prices of €290, while Martinique has half-day rentals from €200 and full-day rates from €300. The Canary Islands have higher starting daily rates of €130 for smaller motorboats and €300 for larger ones, with weekly rates reaching up to €6,000. Overall, Madeira is the most affordable for motorboats, while larger, more luxurious motorboats are pricier in the Canary Islands.

Sailboat rentals are typically most affordable in the Azores and Martinique, with daily rates starting at €150 and averaging around €580 in both regions. Weekly rates in Martinique and Madeira start higher, at €2,800, while the Canary Islands offer competitive weekly rates starting at €2,000 but reaching up to €6,000. The Canary Islands are the most expensive for daily rentals, at €450 on average. Thus, the Azores and Martinique provide the most economical options for sailboats.

Catamaran rentals are cheapest in Madeira, with weekly rates beginning at €2,300. In Martinique, smaller catamarans range from €700 to €1,000 per day, while larger, luxurious models cost up to €5,000 daily. The Canary Islands are slightly more expensive for daily rentals, starting at €700, with weekly rates up to €6,000. Pricing in the Azores is not as detailed, but catamarans are costlier due to their comfort and size. Madeira offers the most affordable entry-level catamarans, while high-end catamarans are pricier in Martinique.

Luxury yachts are significantly more expensive in Martinique, with weekly rates ranging from \$40,000 to over \$1.4 million for motor yachts. In Madeira and the Canary Islands, daily rates for luxury yachts start at €3,500 and €1,100, respectively, while hourly rates in both regions begin at €220. Pricing details for the Azores are less specific but are comparable to Madeira and the Canary Islands. Martinique is the most expensive destination for luxury yachts, while the Canary Islands offer more accessible options for premium experiences.

## 9.5.5 Cruises

### 9.5.5.1 Market Overview, Evolution and key trends

The global cruise market has experienced remarkable growth in recent years, solidifying its position as a key segment of the global tourism industry. According to the *Stay of the Cruise Industry Report 2024* (CLA 2024)<sup>29</sup> of the Cruise Lines International Association (CLA), 31.7 million passengers were recorded worldwide in 2023, surpassing 2019 figures by 7%.

The global cruise industry has shown a strong post-COVID recovery in all these areas apart from Asia and Pacific, with total passenger volumes increasing by **6.8%** from 29.7 million in 2019 to 31.7 million in 2023. North America leads the recovery with a significant growth of **17.5%**, reflecting robust demand in this key market. Europe has also shown growth, with a **6.5%** increase, demonstrating a steady return to pre-pandemic levels. South America has seen similar

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<sup>29</sup> Cruise Lines International Association (CLA). *Stay of the Cruise Industry Report 2024*. Available at the time of writing the report at: [https://cruising.org/-/media/clia-media/research/2024/2024-state-of-the-cruise-industry-report\\_updated-050824\\_web.ashx](https://cruising.org/-/media/clia-media/research/2024/2024-state-of-the-cruise-industry-report_updated-050824_web.ashx)



recovery trends, with a **6.6%** rise in passenger volumes. However, the recovery has been uneven, with **Asia** experiencing a notable decline of **-37.7%**, highlighting ongoing challenges in the region. **Australasia** has remained relatively stable, with only a slight decrease of **-1.0%**.

Table 49. Global cruise market, – Number of passengers. Year 2019 – 2023

Source Region	2023 (million passengers)	2019 (million passengers)	% Change (2019 to 2023)
North America	18.1	15.4	+17.5%
Europe	8.2	7.7	+6.5%
Asia	2.3	3.7	-37.7%
Australasia	1.3	1.35	-1.0%
South America	0.996	0.935	+6.6%
Global	31.7	29.7	+6.8%

Source: Cruise Lines International Association<sup>29</sup>

According with CLA (2024) 10% increase in cruise capacity is projected from 2024 to 2028, reflecting continuous investment by cruise lines in new ships and sustainable technologies. This growth aligns with the industry's efforts to achieve net-zero emissions by 2050.

The chart at the left side below displays the top 10 cruise markets globally, comparing passenger volumes between 2019 and 2023, highlighting the recovery and growth trends post-COVID. Focusing on the top three markets—**United States**, **Germany**, and the **United Kingdom**:

1. **United States:** The U.S. remains the largest cruise market, with **14.2 million passengers in 2023**, marking a strong recovery and growth of **19%** compared to the **12 million passengers in 2019**. This highlights the robust demand and resilience of the U.S. market, driven by its extensive cruise infrastructure and proximity to popular destinations like the Caribbean.
2. **Germany:** The German market experienced a slight decline, with passenger numbers falling from **2.6 million in 2019** to **2.5 million in 2023**, representing a **3% decrease**. This modest drop reflects slower recovery trends in the European market, possibly due to lingering effects of the pandemic on international travel preferences and economic factors.
3. **United Kingdom:** The U.K. market has shown remarkable growth, increasing from **1.9 million passengers in 2019** to **2.2 million in 2023**, a rise of **16%**. This growth demonstrates strong demand for cruising in the U.K., likely driven by a combination of domestic interest in cruises and a recovery in European itineraries.

The chart at the right side below illustrates the passenger volumes across key cruise destinations, comparing 2019 and 2023 figures, highlighting the recovery and growth trends post-pandemic. Here is an analysis of the top three destinations:

1. **Caribbean/Bahamas/Bermuda:** This region continues to dominate as the top cruise destination, with **12.9 million passengers in 2023**, reflecting a **7.5% increase** compared

to **12 million in 2019**. The steady growth underscores the enduring popularity of the Caribbean, supported by its proximity to major cruise markets like the U.S., year-round appeal, and extensive port infrastructure.

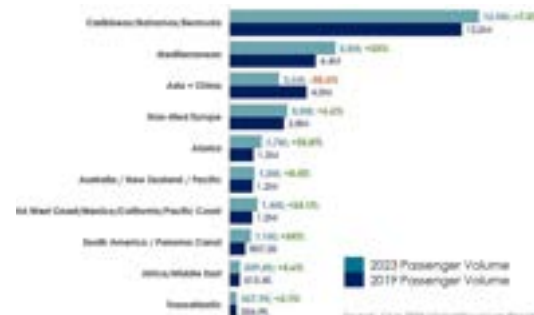
2. **Mediterranean:** The Mediterranean region has shown significant growth, increasing from **4.4 million passengers in 2019 to 5.6 million in 2023**, a remarkable rise of **23%**. This growth highlights the region's recovery and increasing attractiveness due to its rich cultural heritage, diverse itineraries, and strong demand from European and global travellers.
3. **Asia + China:** In stark contrast to the other two regions, Asia and China have seen a notable decline in cruise passenger volumes, dropping from **4 million in 2019 to 2.4 million in 2023**, a decline of **-36.5%**. This decrease reflects ongoing challenges in the region, including stricter travel restrictions during the pandemic and a slower return to international cruise operations.

Figure 5. Top 10 Cruise Source Markets



Source: CLA<sup>29</sup>

Figure 6. Top 10 Cruise Destinations



Source: CLA<sup>29</sup> | Error! Marcador no definido.

In the context of this study, it is important to highlight how the Ors occupy a strategic geographical position as a bridge between the North American and European Atlantic markets (the main cruise markets). While they can be considered isolated territories generating demand independently from these markets, they also benefit from this position during transitional periods between the demand peaks in each region and the movement of cruise ships between the two markets to meet demand. On the other hand, Martinique is located in the area of highest demand (Caribbean/Bahamas/Bermuda). The former serves as a reference point for two of the three main passenger-generating hubs (UK and Germany), while the latter aligns with the largest hub (USA).

The average age of cruise passengers has decreased to 46.3 years, indicating growing popularity among younger generations. Additionally, there is an upward trend in multi-generational travel, with over 30% of families traveling with at least two generations and 28% including three to five generations.

The cruise industry significantly contributes to local and national economies, creating jobs and driving economic development in the regions it visits. According with CLA(2024) this sector is a major economic driver on a global scale. In 2022, with 20.4 million cruise passengers, the sector contributed an impressive **\$138 billion** to the global economy. It supported **1.2 million jobs**

**worldwide**, generating **\$43 billion** in wages. Additionally, the industry accounted for **\$69 billion** in Gross Domestic Product (GDP), underscoring its significant role in global economic activity. These figures highlight the industry's capacity to stimulate diverse economic sectors, including tourism, hospitality, and maritime services, making it a cornerstone of economic recovery and growth in many regions.

Cruise ports can be categorized into three main types based on their function and the nature of demand they handle: **base ports**, **transit ports**, and **transporting ports**.

- **Base ports** serve as the starting and ending points of cruise itineraries, where passengers embark or disembark in large numbers.
- **Transit ports**, on the other hand, are intermediate stops along a cruise route, where passengers spend limited time exploring the destination before continuing their journey.
- **Partial turnaround ports** which cater to cruise passengers beginning or ending their journey at these locations without being full base ports. These ports are particularly appealing for segments of travellers seeking shorter cruise itineraries or "segment cruises," allowing passengers to embark or disembark mid-route. This model accommodates those who may have limited time or prefer more flexible travel options. Transporting ports represent a growing market segment, as cruise lines increasingly design itineraries to attract diverse passenger preferences, creating opportunities for ports to capture demand even without the extensive infrastructure required of traditional base ports.

For a port to attract demand, several key factors must be in place. First, the port and its surrounding area must offer strong **touristic appeal**, a factor that is undoubtedly present in the study area, characterized by its rich cultural heritage, natural beauty, and historical landmarks. For base and transporting ports, it is crucial to have **excellent transportation connections**, particularly to international airports, to facilitate easy access for embarking and disembarking passengers. Additionally, a robust **hospitality infrastructure**, including hotels, is essential for accommodating passengers who may arrive before their cruise departure or stay afterward.

Another critical factor is the availability of **complementary activities and excursions** to enhance the passenger experience. Typical offerings include guided city tours, visits to cultural and historical landmarks, outdoor adventures such as hiking or water sports, and culinary experiences showcasing local cuisine. These factors collectively create a compelling proposition for cruise operators and passengers, ensuring the port's competitiveness and sustained demand.

**Complementary activities and excursions for cruise passengers represents an exceptional area of interest, introducing synergies into the focus of the study, which aims to identify opportunities for developing Marine and Coastal Tourism. Cruise passengers can serve as an excellent target for short activities (transit ports) or more extended ones (base ports and partial turnaround ports).**

In the study area, there is a diverse range of ports serving distinct functions. The region includes both **base ports** (or **Partial turnaround ports**) and **transit ports**, which are intermediate stops where passengers explore the destination before continuing their journey.

Thus, cruise operators design in the area of study itineraries that visit multiple islands, catering to both regional and supra-regional travel preferences. Regional itineraries, for instance, may focus solely on the Canary Islands, offering passengers the opportunity to explore the diverse attractions within this specific area. Supra-regional itineraries, on the other hand, connect multiple island groups such as the Azores, Madeira, and the Canary Islands, providing a broader and more varied cruising experience. This strategic approach by operators enhances the appeal of the study area by leveraging its geographical proximity and rich diversity of destinations.

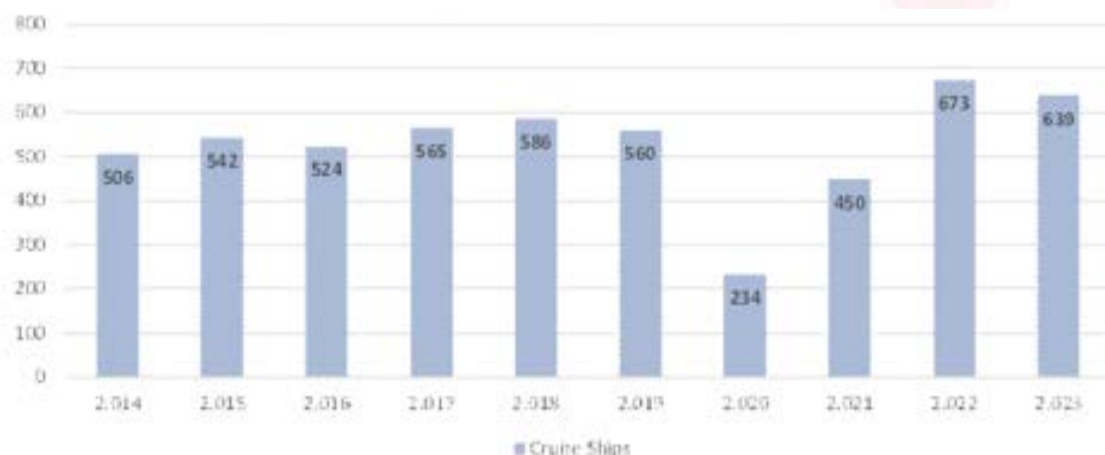
The following section analyses the actual demand for cruises in the target region over the past few years. This examination provides insights into passenger volumes, port usage trends, and the growth dynamics of the cruise industry in the area, forming a basis for identifying opportunities and challenges for future development.

### 9.5.5.2 Demand Analysis (cruise passengers and cruise ships)

#### Las Palmas Port Authority

The number of cruise ship calls at the Las Palmas Port Authority has shown a significant evolution from 2014 to 2023, confirming its position as the region with the highest traffic in this segment within the scope of this study. Starting at **506 calls in 2014**, the port experienced steady growth, peaking at **586 calls in 2018**, before a sharp decline to **234 calls in 2020** due to the COVID-19 pandemic and its impact on global tourism. This decline marked a **60% reduction** from 2019 levels. Post-pandemic recovery has been robust, with the number of calls rebounding to **673 in 2022**, the highest in the observed period, and slightly adjusting to **639 calls in 2023**. Over the entire timeframe, the Compound Annual Growth Rate (CAGR) for cruise ship calls has been **2.6%**, reflecting sustained growth and resilience in this critical tourism segment.

Figure 7. Cruise Port calls. Year 2014-2023 – Las Palmas Port Authority,



Source: Puertos del Estado<sup>16</sup>.

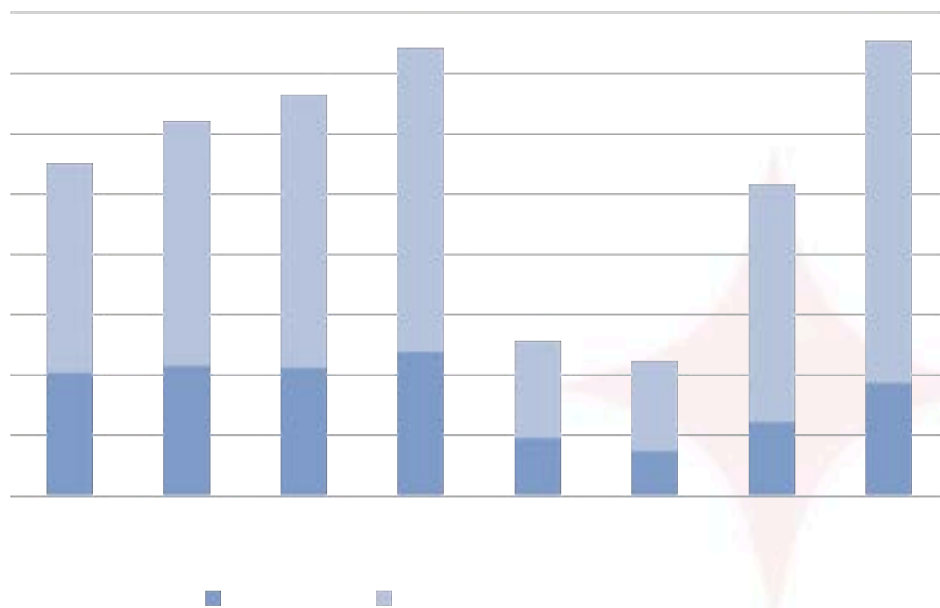
The number of cruise passengers has shown the same dynamic evolution. Total cruise passengers reached **1,106,000 in 2023**, with a clear distinction between **homeport** passengers and those **in transit**.

Passengers using Las Palmas as a **homeport** (embarking or disembarking) amounted to **377 thousands in 2023**, representing approximately **24.9%** of the total. This segment has steadily grown over time, rebounding strongly from **194 thousands in 2020** during the pandemic-related downturn.

Passengers **in transit**, stopping in Las Palmas as part of their cruise itinerary, reached **1,13 million in 2023**, accounting for **75.1%** of the total. This segment has consistently been the larger component of cruise traffic, demonstrating Las Palmas's appeal as a key stopover for cruise lines in the region.

Overall, this Port Authority experienced a strong recovery after the COVID-19 pandemic, with cruise passenger numbers surging from **450 thousands in 2021** to over **1,5 million** in 2023, reaffirming its position as a significant player in the cruise industry.

Figure 8. Cruise Passengers. Year 2016-2023. – Las Palmas Port Authority,



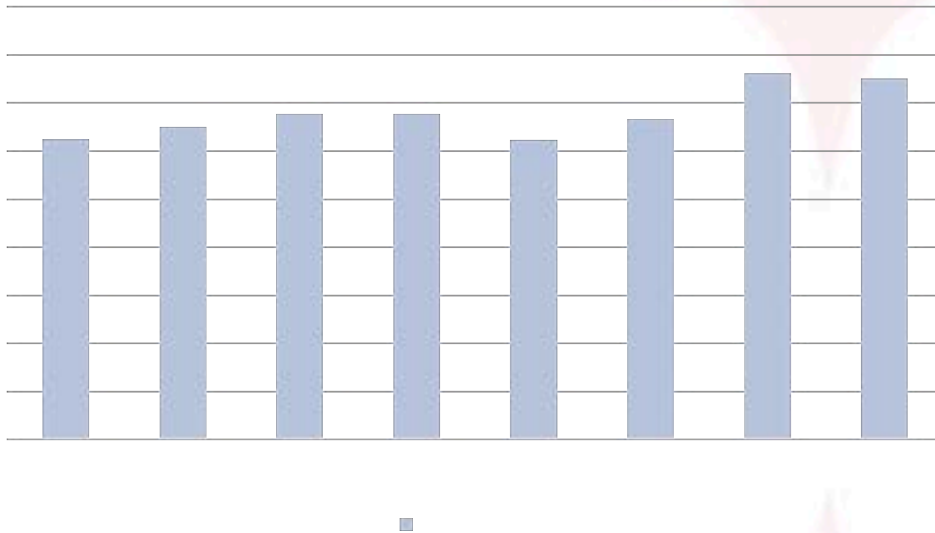
Source: Puertos del Estado<sup>16</sup>.

The transit-to-homeport ratio for cruise passengers has shown consistent growth over the years, highlighting the increasing preference for Las Palmas as a transit destination rather than a homeport. In 2016, transit passengers accounted for **63%** of the total, with a gradual increase observed in subsequent years, reaching **68% in both 2018 and 2019**.

The trend briefly dipped back to **63% in 2020**, reflecting disruptions caused by the COVID-19 pandemic. However, the ratio rebounded strongly during the recovery period, peaking at **76% in 2022**, indicating a significant focus on transit traffic as the cruise industry regained momentum.

By 2023, the transit ratio stabilized slightly at **75%**, maintaining its dominance as the primary category of cruise passenger traffic.

Figure 9. Cruise Passengers. Year (%Transit). - Las Palmas Port Authority,



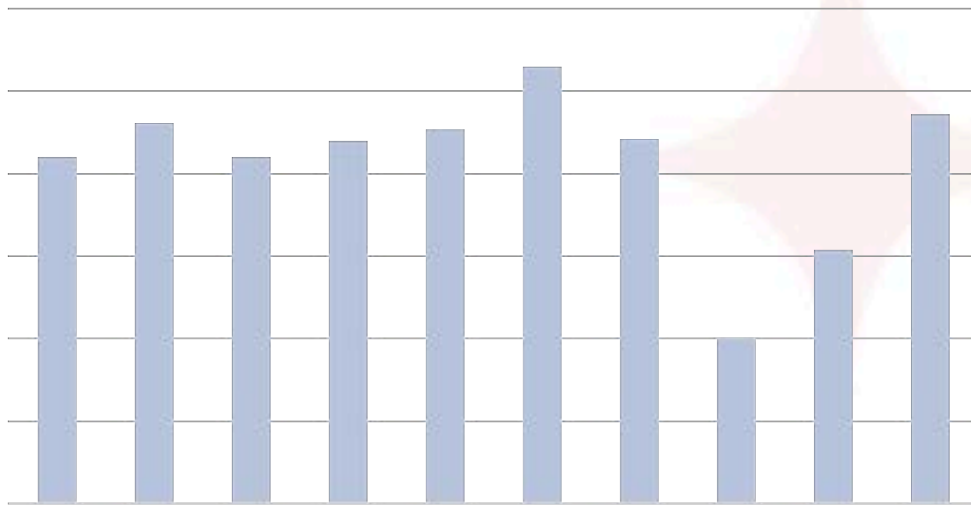
Source: Puertos del Estado<sup>16</sup>.

The average number of passengers per cruise between 2014 and 2023 is **2,076.8**, including the pandemic years 2021 and 2022, which saw significant disruptions in cruise operations. However, when excluding these years, the average increases to **2,278.5**, reflecting a more stable and representative figure of normal operations.

The evolution shows consistent growth in the number of passengers per cruise from **2,105 in 2014** to a peak of **2,654 in 2019**, indicating increasing cruise ship capacity. The pandemic years of 2021 and 2022 significantly disrupted this trend, with averages dropping to **1,001 in 2021** and **1,539 in 2022**, illustrating the lower occupancy rates. By 2023, the ratio recovered to **2,367 passengers per cruise**, approaching pre-pandemic levels and signalling a strong rebound in cruise activity.



Figure 10. Number of passengers per cruise. Year 2013-2023. - Las Palmas Port Authority,



Source: Puertos del Estado<sup>16</sup>.

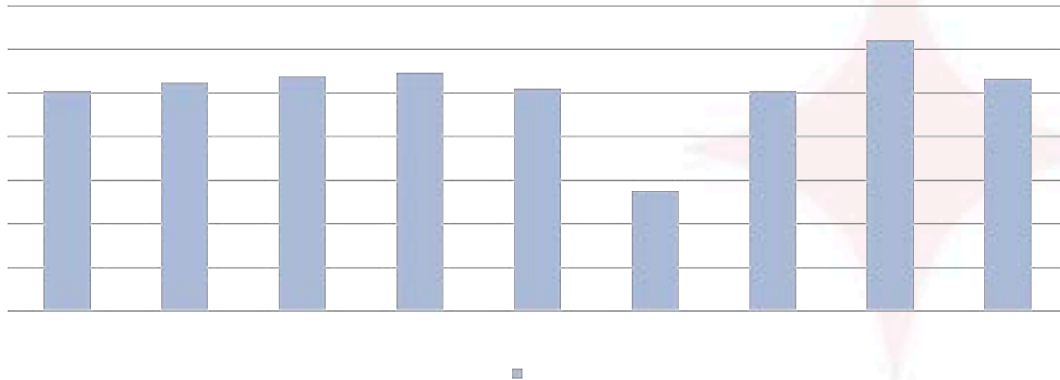
#### Santa Cruz de Tenerife Port Authority

The number of cruise ship calls at the Tenerife Port Authority experienced a steady evolution from 2015 to 2023. Starting with **506 calls in 2015**, the number increased consistently until reaching a peak of **549 calls in 2018**, demonstrating steady growth in cruise activity during this period. However, a slight decline was observed in 2019, with **511 calls**, before the pandemic-induced disruptions caused a sharp drop to **277 calls in 2020**, representing a **46% reduction** from the previous year.

Post-pandemic recovery began in 2021 with **506 calls**, returning to pre-pandemic levels, followed by a strong rebound in 2022 with a new peak of **623 calls**, reflecting the revitalization of the cruise industry. In 2023, the number of cruise ship calls stabilized at **535**, slightly below the 2022 high but still indicating sustained activity.

Overall, the Tenerife Port Authority demonstrated resilience and a strong recovery following the COVID-19 disruptions, with the number of cruise calls showing a more modest CAGR of **0.75%** from 2015 to 2023.

Figure 11. Cruise Port calls. Year 2014-2023 – Santa Cruz de Tenerife Port Authority,



Source: Puertos del Estado<sup>16</sup>.

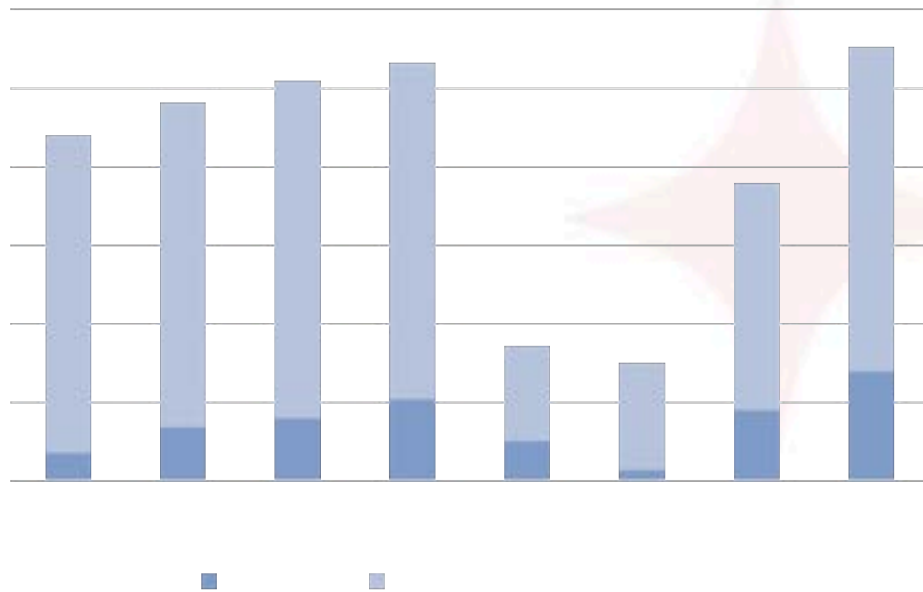
The number of cruise passengers demonstrated a clear evolution from 2015 to 2023, with a distinction between transit passengers and those using Tenerife as a homeport. Total cruise passengers grew from **883,000 in 2015** to a peak of **1,106,000 in 2023**, reflecting a strong recovery and growth trend in the post-pandemic years. However, the recovery in Tenerife was slower compared to Las Palmas, where cruise passenger numbers rebounded more rapidly after the pandemic.

Transit passengers consistently accounted for the majority, increasing from **810,000 in 2015** to **858,000 in 2018**, which marked the pre-pandemic peak. The numbers then stabilized at **857,000 in 2019** before dropping sharply to **242,000 in 2020** due to the COVID-19 pandemic, a decline of over **70%** compared to 2019. Recovery was gradual, with **576,000 transit passengers in 2022** and a significant rebound to **825,000 in 2023**, comprising **74.6%** of total cruise passengers.

Homeport passengers (those embarking or disembarking) showed a more gradual growth, starting at **73,000 in 2015** and reaching **210,000 in 2019** before declining to **104,000 in 2020** during the pandemic. Post-pandemic recovery saw a rise to **184,000 in 2022** and further growth to **281,000 in 2023**, accounting for **25.4%** of total cruise passengers.

While Tenerife has seen robust growth in both transit and homeport segments, the pace of recovery post-pandemic was more measured compared to Las Palmas, where passenger volumes bounced back more quickly.

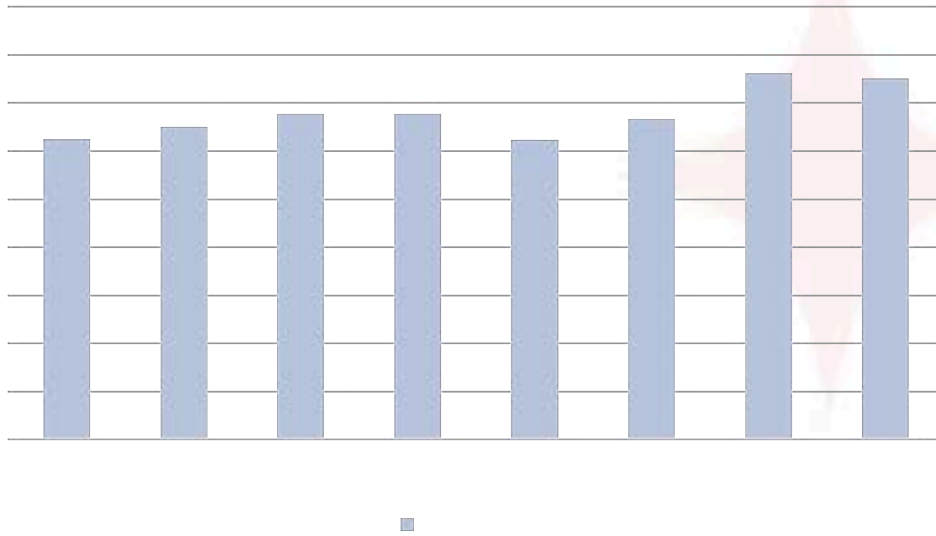
Figure 12. Cruise Passengers. Year 2014-2023. - Santa Cruz de Tenerife Port Authority,



Source: Puertos del Estado<sup>16</sup>.

The percentage of transit passengers at the Tenerife Port Authority has consistently dominated total cruise passenger traffic, reflecting the port's role as a key stopover destination. In 2023, transit passengers accounted for **74.6%** of the total cruise passengers, with a slight fluctuation compared to pre-pandemic years. The proportion of transit passengers was **91.7% in 2015**, decreasing gradually to **80.1% in 2018** and stabilizing at **80.4% in 2019** before the pandemic. During the pandemic in 2020, the transit percentage declined sharply to **70.1%** due to reduced operations, followed by a gradual recovery to **75.8% in 2022** and a near return to pre-pandemic trends by 2023.

Figure 13. Cruise Passengers. Year (%Transit). - Las Palmas Port Authority,



Source: Puertos del Estado<sup>16</sup>.

The percentage of transit passengers has shown contrasting trends between Las Palmas and Tenerife over the years. In Las Palmas, the proportion of transit passengers has steadily increased, starting at **63% in 2016** and peaking at **76% in 2022**, before stabilizing at **75% in 2023**.

In contrast, Tenerife has experienced a gradual decline in the percentage of transit passengers over the same period. In 2015, transit passengers represented **92%** of the total, but this figure steadily decreased to around **80%** in the years prior to the pandemic and dropped further to **70.1% in 2020**. While the share of transit passengers recovered post-pandemic, it now stands at **75% in 2023**, closely aligning with the current ratio observed in Las Palmas.

Despite these differing trends, both ports now exhibit a similar percentage of transit passengers, converging at approximately **75%**.

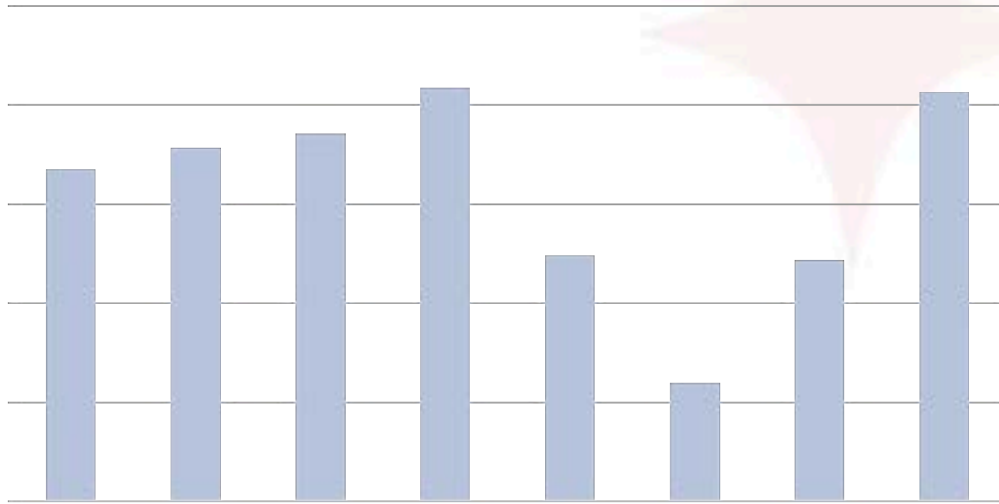
The evolution of the number of passengers per cruise at the Tenerife Port Authority shows a consistent increase from **1,679 passengers per cruise in 2016** to a peak of **2,089 passengers per cruise in 2019**, indicating growing cruise capacities or higher occupancy rates in pre-pandemic years.

However, during the pandemic (2020–2022), the ratio dropped significantly due to reduced cruise operations and lower occupancy rates, reaching **1,246 in 2020**, a dramatic low of **602 in 2021**, and **1,220 in 2022**. These years reflect the exceptional disruptions caused by the COVID-19 pandemic and are not representative of normal operations.

By 2023, the ratio recovered to **2,068 passengers per cruise**, nearly matching the pre-pandemic peak of 2019, reflecting a return to more typical cruise operations.

The average number of passengers per cruise across the entire period, including the pandemic years, is **1,569 passengers per cruise**. Excluding the pandemic years (2020–2022), the average increases to **1,897 passengers per cruise**, providing a clearer picture of the port's usual performance and highlighting the significant impact of the pandemic on cruise operations

Figure 14. Number of passengers per cruise. Year 2013-2023. - Santa Cruz de Tenerife Port Authority,



Source: Puertos del Estado<sup>16</sup>.

When comparing the number of passengers per cruise between the ports of Las Palmas and Tenerife, some key differences emerge. In 2023, Tenerife recorded **2,068 passengers per cruise**, slightly lower than Las Palmas' **2,367 passengers per cruise**. Both ports experienced a similar trend of growth before the pandemic, with Tenerife peaking at **2,089 passengers per cruise in 2019**, while Las Palmas reached its peak in the same year at **2,654 passengers per cruise**. However, during the pandemic years (2020–2022), the impact was more pronounced in Tenerife, where the ratio dropped as low as **602 passengers per cruise in 2021**, compared to **1,001 in Las Palmas** during the same year.

Figure 49. Cruise at Puerto del Rosario (Las Palmas)



### Azores

The number of cruise ship calls at the ports of the Azores has shown significant variations over the years, primarily impacted by the global COVID-19 pandemic in 2020. In 2014, the Azorean ports recorded **90 cruise ship calls**, which steadily increased to a pre-pandemic peak of **152 calls** in 2017. However, the pandemic caused a dramatic collapse in 2020, with only **19 cruise ships** docking, reflecting the severe disruption to global cruise operations.

Following the pandemic, the ports experienced a remarkable recovery. Cruise ship calls surged to **96 in 2021** and further to **200 in 2022**, marking the highest number of calls ever recorded. In 2023, the number slightly decreased but remained strong at **190 cruise ship calls**, underscoring the sustained recovery of the cruise tourism sector.

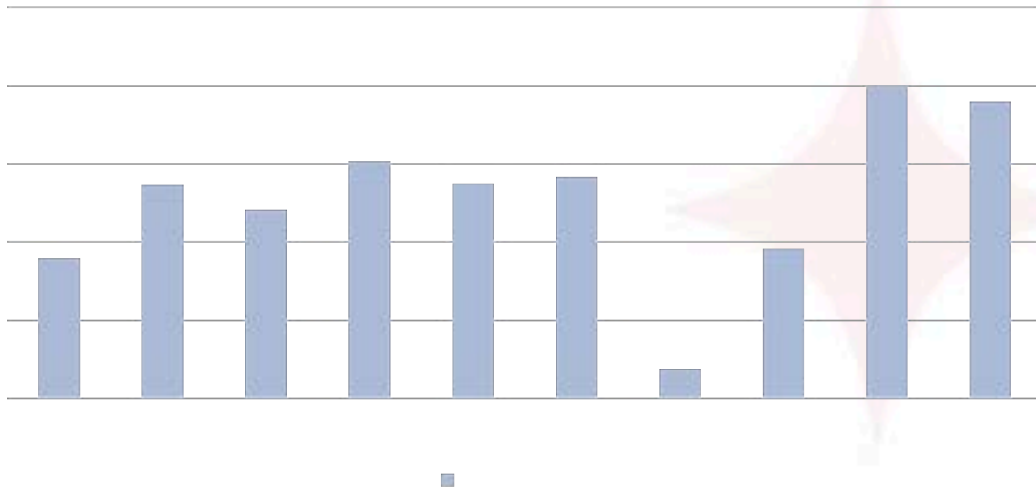
Over the period from 2014 to 2023, the CAGR for cruise ship calls was approximately **8.4%**, highlighting long-term growth despite the temporary setback in 2020. This recovery demonstrates the resilience and growing attractiveness of the Azores as a key destination for cruise tourism in the North Atlantic.



Figure 50. Cruises in Azores



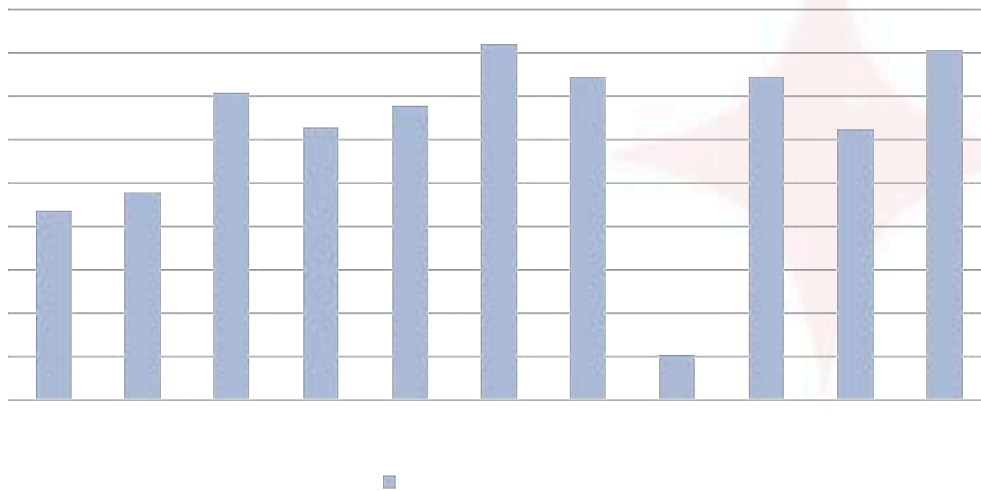
Figure 15. Cruise Port calls. Year 2014-2023 - Portos dos Açores,



Source: Own elaboration with several annual reports Portos dos Açores, S.A

The data illustrates the growth in cruise passenger traffic at Azorean ports, showing a long-term upward trend. In **2023**, a total of **161,398 cruise passengers** were recorded, an increase from **125,057 passengers** in **2022**. This highlights a significant growth in passenger numbers over the past year.

Figure 16. Cruise Passengers. Year 2013-2023. - Portos dos Açores,



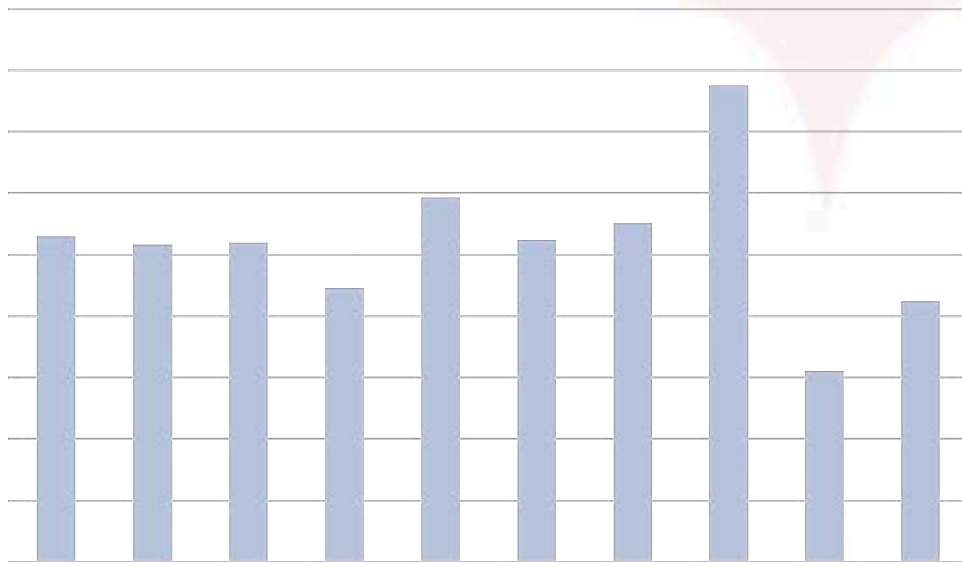
Source: Own elaboration with several annual reports Portos dos Açores, S.A

However, when comparing passenger growth to the number of cruise ship calls, it becomes evident that the average number of passengers per cruise ship call has decreased over time. In **2023**, the average number of passengers per ship was **849**. Over the entire period from 2014 to 2024, the average was **1,040** passengers per ship, indicating a reduction in passenger density per call in recent years. Thus, over the period from 2013 to 2023, the CAGR for cruise passenger

traffic was approximately **6.0%**, while the CAGR for the number of cruise ship calls was slightly lower at **8.4%**.

This trend suggests that while cruise tourism in the Azores is expanding, with more visitors overall, the industry may be shifting towards smaller ships or voyages with lower passenger capacities using as standard a **small cruise**.

Figure 17. Number of passengers per cruise. Year 2013-2023. - Portos dos Açores,



Source: Own elaboration with several annual reports Portos dos Açores, S.A

Portos dos Açores, S.A also provided data regarding port utilization. In **2023**, a total of **190 cruise ship calls** were recorded across the ports of the Azores, a slight decrease of **5.0%** compared to **2022**. The three busiest ports in terms of cruise ship calls were **Ponta Delgada (85 calls)**, **Praia da Vitória (28 calls)**, and **Horta (26 calls)**.

- **Ponta Delgada**, on São Miguel Island, maintained its cruise activity at **85 calls**, unchanged from 2022, reflecting its position as the primary hub for cruise traffic in the Azores.
- **Praia da Vitória**, on Terceira Island, experienced a decline from **36 calls in 2022 to 28 calls in 2023**, representing a decrease of **22.2%**.
- **Horta**, on Faial Island, recorded **26 calls in 2023**, down from **38 calls in 2022**, a significant drop of **31.58%**.

These trends highlight Ponta Delgada's stability as a key destination, while secondary ports like Praia da Vitória and Horta saw reduced activity, possibly due to changes in cruise itineraries. Smaller ports, such as Corvo, showed remarkable growth with a **200% increase**, indicating rising interest in lesser-known destinations.

Table 50. Portos Azores –Breakdown of Cruise Port Calls by Port. Year 2021 - 2023

Port	Island	2021	2022	2023	Variation % (23/22)
Vila do Porto	Santa Maria	7	5	7	40.0%
Ponta Delgada	São Miguel	23	85	85	0.0%
Praia da Vitória	Terceira	12	36	28	-22.2%
Angra do Heroísmo	Terceira	4	8	8	0.0%
Praia	Graciosa	9	12	11	-8.33%
Velas	São Jorge	8	6	8	33.33%
Calheta	São Jorge	1	1	0	-100.0%
São Roque	Pico	1	0	3	n.a
Madalena	Pico	0	1	0	-100.0%
Lajes	Pico	6	5	5	0.0%
Horta	Faial	15	38	26	-31.58%
Santa Cruz	Flores	4	1	2	100.0%
Lajes das Flores	Flores	3	4	4	0.0%
Corvo	Corvo	4	4	12	200.0%
<b>Total</b>	-	<b>96</b>	<b>200</b>	<b>190</b>	<b>-5.0%</b>

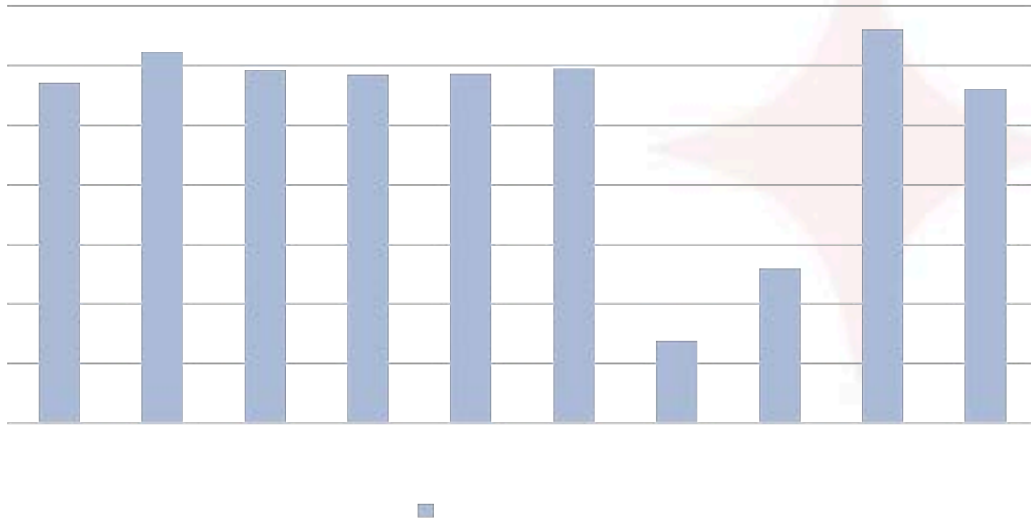
Source: Annual report 2023. Portos dos Açores, S.A

### Madeira

The evolution of cruise ship calls in Madeira shows steady activity pre-COVID, followed by a sharp decline due to the pandemic and a slower recovery compared to other contexts such as the Azores. In **2014**, Madeira welcomed **286 cruise ships**, a figure that gradually increased, peaking at **331 calls** in **2022**. However, the pandemic severely disrupted operations, with only **70 cruise ship calls** recorded in **2020**.

Post-COVID, the recovery has been slower than in the Azores. By **2023**, Madeira recorded **281 cruise ship calls**, a slight decrease from the 2022 peak, highlighting the lingering impact of the pandemic on its cruise sector. Despite this, the **Compound Annual Growth Rate (CAGR)** from 2014 to 2023 remains positive at approximately **-0.19%**, reflecting resilience in the long-term trend.

Figure 18. Cruise Port calls. Year 2014-2023. APRAM (Madeira)



Source: Own elaboration with several annual reports APRAM

Figure 51. Cruises at Madeira



In **2013**, Madeira recorded **476,624 cruise passengers**, with a sharp increase in **2014** to **980,794 passengers**, marking the highest recorded figure in the decade.

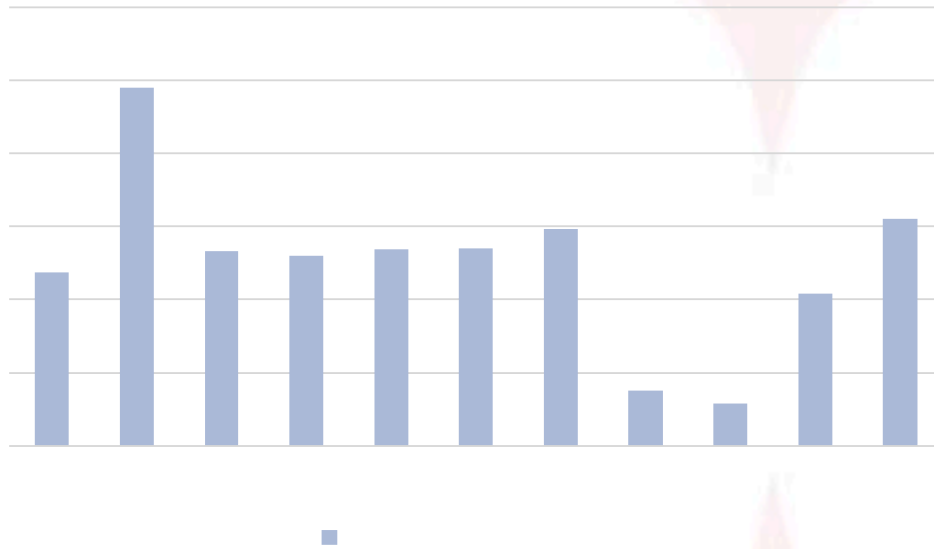
Following this peak, cruise passenger traffic stabilized between **2015** and **2019**, with volumes ranging between **535,082** and **594,974 passengers**. However, the onset of the COVID-19 pandemic in **2020** led to a dramatic decline, with only **152,448 passengers**, reflecting the near-total shutdown of the global cruise industry.

The post-pandemic recovery began in **2021**, with **117,289 passengers**, and accelerated significantly in **2022**, reaching **417,758 passengers**. By **2023**, cruise passenger traffic

rebounded to **624,000 passengers**, highlighting a robust recovery but still falling short of pre-pandemic peaks such as 2014.

From **2013 to 2023**, the **CAGR** for cruise passenger traffic was approximately **2.7%**, demonstrating long-term resilience despite the disruptions. The data indicates that while Madeira's cruise tourism sector has regained momentum, there is room for further growth to return to its peak levels.

Figure 19. Portos dos Madeira –Cruise Passengers. Year 2013-2023



Source: Own elaboration with several annual reports APRAM

Table 51. Portos dos Madeira –Cruise Passengers. Year 2013-2023

Year	Cruise Traffic
2013	476,624
2014	980,794
2015	535,082
2016	522,475
2017	540,588
2018	541,467
2019	594,974
2020	152,448
2021	117,289
2022	417,758
2023	624,000

Source: Own elaboration with several annual reports APRAM

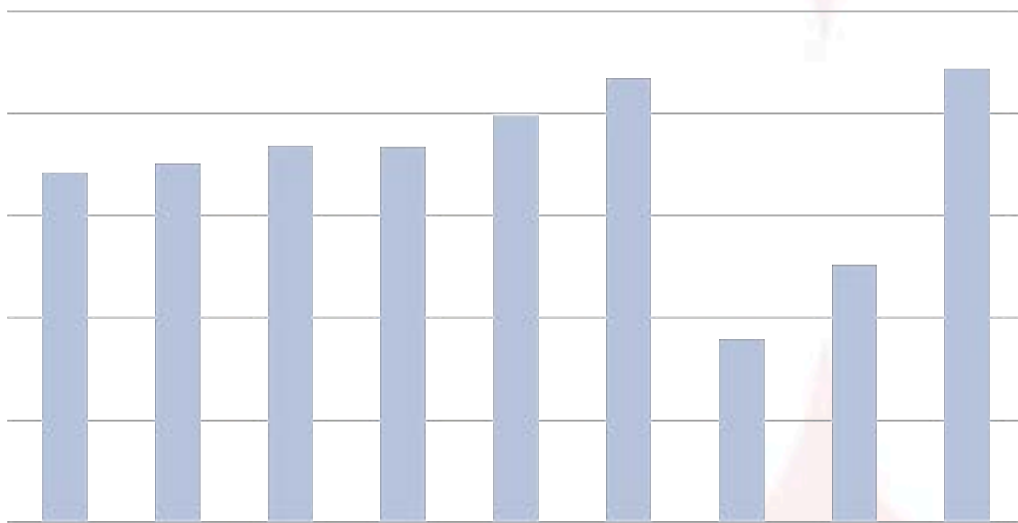


In 2015, the average was 1,715 passengers per call, gradually increasing to a peak of 2,178 passengers per call in 2020, reflecting an increase in passenger volumes relative to the number of ship calls.

However, the impact of the COVID-19 pandemic caused this average to drop to 902 passengers per call in 2021, highlighting the significant disruption in cruise operations. Recovery followed in 2022, with an average of 1,262 passengers per call, and further improvement in 2023, reaching a new high of 2,221 passengers per call.

The average of **1.915 passenger per cruise** over the period 2015-2023 confirms Madeira's position as a reference port for **medium-sized cruise ships**.

Figure 20. Number of passengers per cruise. Year 2015-2023. – APRAM



Source: Own elaboration with several annual reports APRAM

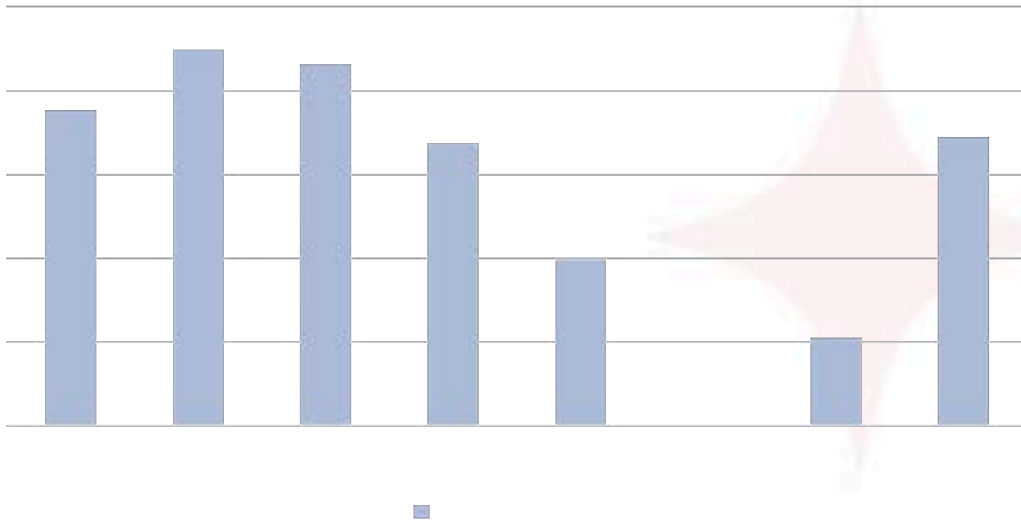
### Martinique

The evolution of cruise ship calls at the Grand Port Maritime de la Martinique reflects strong activity before COVID-19, followed by a significant decline due to the pandemic and a partial recovery in recent years. In 2016, the port welcomed **189 cruise ships**, with the number peaking at **225 calls in 2017** and remaining robust at **216 calls in 2018**.

The pandemic had a severe impact, with **no cruise ship operations recorded in 2020**, marking a complete halt of activity. This unprecedented disruption was followed by a slight recovery in 2021, with only **53 cruise ship calls**, as global restrictions began to ease.

By 2023, the port recorded **173 cruise ship calls**, showing noteworthy progress but still falling short of the pre-pandemic peak years of 2017 and 2018.

Figure 52. Cruise Passenger (Vessels) - GPMM (Martinique)



Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

Figure 53. Cruise At Martinique



In 2016, the Grand Port Maritime de la Martinique recorded 654,097 cruise passengers, followed by a significant increase in 2017 to 897,977 passengers, marking the highest recorded figure in the analysed period. In 2018, traffic remained high at 889,180 passengers, showcasing strong cruise activity before the subsequent decline.

Between 2018 and 2019, cruise passenger traffic dropped to 670,684 passengers. The impact of the COVID-19 pandemic was evident in 2020, with volumes sharply decreasing to 406,090 passengers, and in 2021, operations came to a complete halt, recording zero passengers due to global travel restrictions.

The recovery began in 2022 with a modest 167,873 passengers, accelerating significantly in 2023 to 681,820 passengers. While this represents a rebound and surpasses the pre-pandemic levels of 2019, it still falls short of the peak years of 2017 and 2018, when traffic exceeded 880,000 passengers.

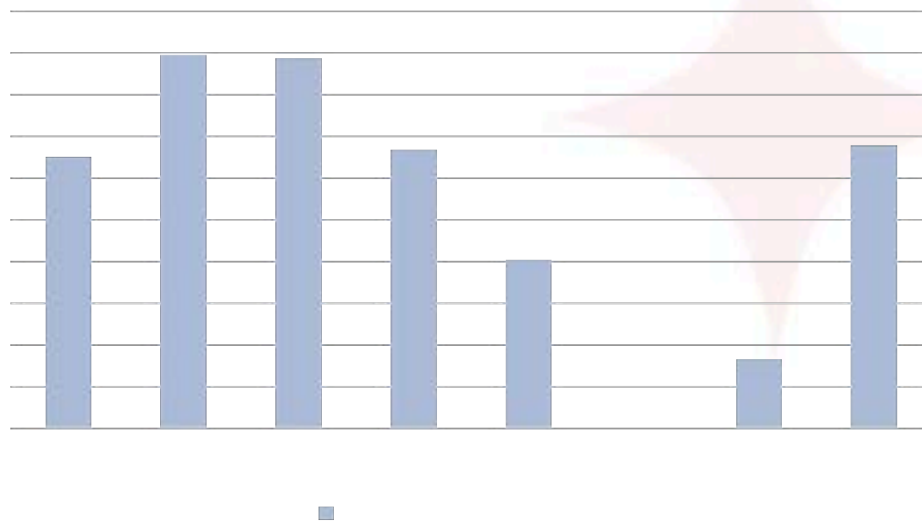
From 2016 to 2023, the Compound Annual Growth Rate (CAGR) was approximately **0.6%**, reflecting a long-term stabilization despite the severe disruptions caused by the pandemic. The data underscores a robust recovery in 2023, with further growth required to fully regain the pre-pandemic highs.

Table 52. Cruise Passengers. Year 2016-2023 - GPMM (Martinique)

Year	Cruise Traffic (Passengers)
2016	654,097
2017	897,977
2018	889,180
2019	670,684
2020	406,090
2021	0
2022	167,873
2023	681,820

Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

Figure 54. Cruise passengers - Martinique



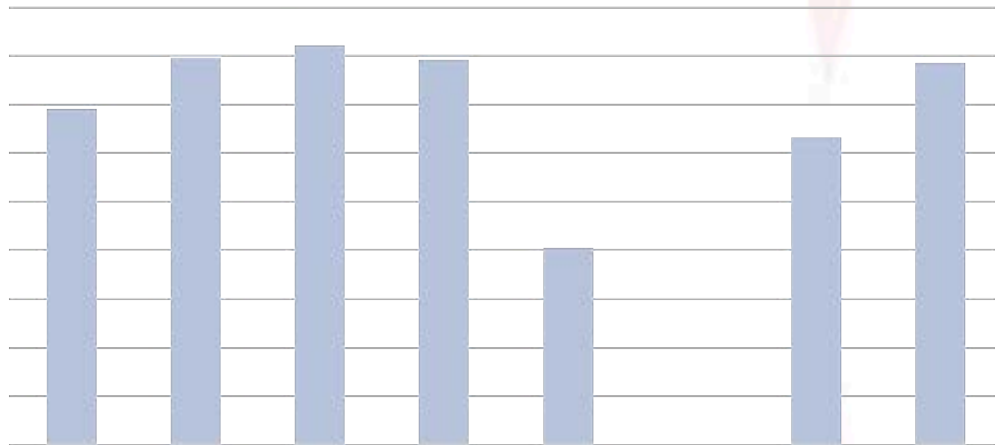
Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

The average number of passengers per cruise ship call at the Grand Port Maritime de la Martinique reveals a clear trend of accommodating **very large cruise ships** over the years with an average of **3.526 passenger per cruise** in 2016-2023. In 2016, the average stood at 3,461

passengers per call, steadily increasing to a peak of 4,117 passengers per call in 2018, reflecting a period when the largest vessels were consistently part of operations. From 2019 onwards, the average slightly declined, reaching its lowest point of 2,037 passengers per call in 2020, a year severely impacted by the COVID-19 pandemic and its associated disruptions.

By 2023, the average rebounded to **3,941 passengers per call**, aligning closely with pre-pandemic levels and reaffirming the port's ability to handle high-capacity cruise ships. This trend underscores the prominence of Martinique as a destination for **very large and mega cruise ships**, maintaining a strong passenger-to-call ratio, which highlights the scale and capacity of the vessels operating in the region.

Figure 55. Average number of passengers per cruise - Martinique



Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

The evolution of cruise passenger traffic at the Grand Port Maritime de la Martinique highlights a clear dominance of transit passengers over homeport passengers. Throughout the analysed period, transit passengers consistently accounted for the majority of total traffic, ranging from 81% to 89% of the total annual volume. In peak years such as 2017 and 2018, transit passengers represented 89% and 87%, respectively, reaffirming Martinique's role as a preferred intermediate stop for cruise itineraries.

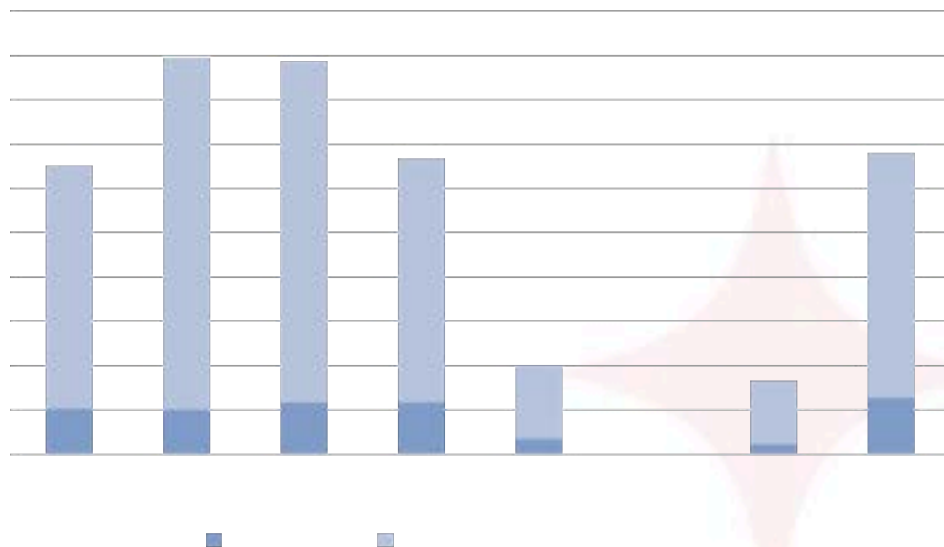
In contrast, homeport traffic, while present, has remained significantly smaller in volume, with its share peaking at 19% in 2023. This distribution underscores **Martinique's positioning as a transit-focused port**, rather than a homeport destination. Over the entire period, the average share of transit passengers is **84%**, solidifying Martinique's vocation as a port of call for mid-journey stops rather than an embarkation or disembarkation hub.

Table 53. GPMM (Martinique) –Cruise Passengers. Breakdown Transit-Homeport Year 2016-2023

Cruise Passenger Traffic				
Year	Homeport	In Transit	Total	% Transit
2016	104,295	549,802	654,097	84%
2017	102,297	795,680	897,977	89%
2018	117,828	771,352	889,180	87%
2019	118,531	552,153	670,684	82%
2020	35,990	167,667	203,657	82%
2021	0	0	0	n/a
2022	23,017	144,856	167,873	86%
2023	128,542	553,278	681,820	81%
Average				84%

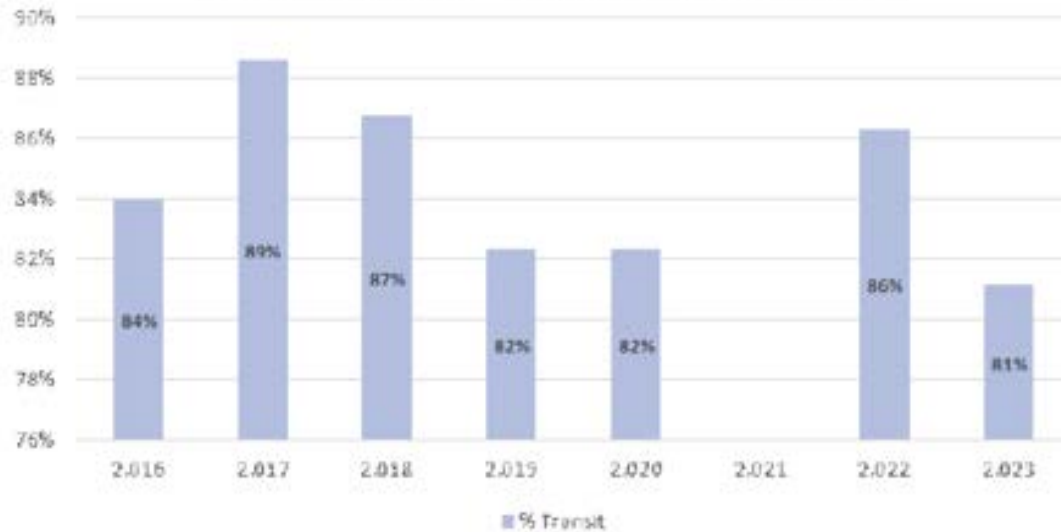
Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

Figure 56. Cruise Passengers. Breakdown Transit-Homeport - GPMM (Martinique)



Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

Figure 57. Cruise Passengers. % Transit – GPMM (Martinique)



Source: Own elaboration based on data collected from Annual Statistic Reports from Grand Port Maritime de la Martinique<sup>20</sup>.

### 9.5.5.3 Port Offer (Cruise Terminals)

#### Key factor on determining port capacity

The port offer and capacity for accommodating cruise traffic is characterized by an integrated system of subsystems that ensure efficient and high-quality service to cruise operators and passengers. These subsystems include the following key elements:

- **Maritime Access Channel:** The port's maritime access channel is a critical component, determining its capacity to safely receive cruise ships. The channel must have sufficient depth, width, and navigational aids to accommodate vessels of diverse sizes, including the largest cruise liners. Additionally, the channel must be free from congestion to allow for timely arrivals and departures, minimizing delays and operational inefficiencies.
- **Port Technical-Nautical Services:** Adequate technical-nautical services, particularly tugboat availability, are essential for safe manoeuvring, docking, and undocking operations. The availability of these services must be appropriately scaled in relation to other commercial port traffic to ensure smooth and efficient operations for all users.
- **Berthing Subsystem:** This subsystem includes the port's berthing infrastructure, such as the number of available berths, their lengths, and their drafts, ensuring they can accommodate cruise ships of different dimensions. The ability to handle simultaneous berths enhances the port's operational efficiency.



- **Landside Subsystem:** Efficient landside logistics are crucial for organizing passenger embarkation and disembarkation processes. This includes the availability of parking areas for buses and taxis to support excursions, as well as facilities for provisioning and refuelling cruise ships.
- **Terminal Facilities:** The terminal must be designed to handle the volume of passengers embarking and disembarking daily. Ports may serve as either transit ports or homeports, each requiring specific customs and security procedures to facilitate smooth operations.


A comprehensive and well-coordinated approach to these subsystems ensures a seamless and satisfying experience for both cruise lines and their passengers while maintaining high operational standards.

In the context of the study area, the first three aspects of the port offer—maritime access channel, port technical-nautical services, and berthing subsystem—do not appear to represent significant limitations for accommodating cruise traffic. These elements are well-developed and adequately meet the operational requirements of modern cruise vessels. As such, a detailed analysis of these aspects is not deemed necessary for this study, allowing the focus to shift toward other subsystems that may have a greater impact on the efficiency and competitiveness of the port offer.

Cruise ships vary significantly in size and passenger capacity, catering to different markets and travel experiences. The following table summarizes the typical ranges of ship length and passenger capacity for different categories of cruise ships:

Table 54. Cruise category and key figures

Cruise Category	Length (meters)	Passenger Capacity
Small Cruises	70 - 200	30 – 1,000
Medium Cruises	200 - 300	1,000 - 2,000
Large and Very Cruises	300 - 350	2,500 - 5,000
Mega Cruises	350 - 365	5,000 - 7,600

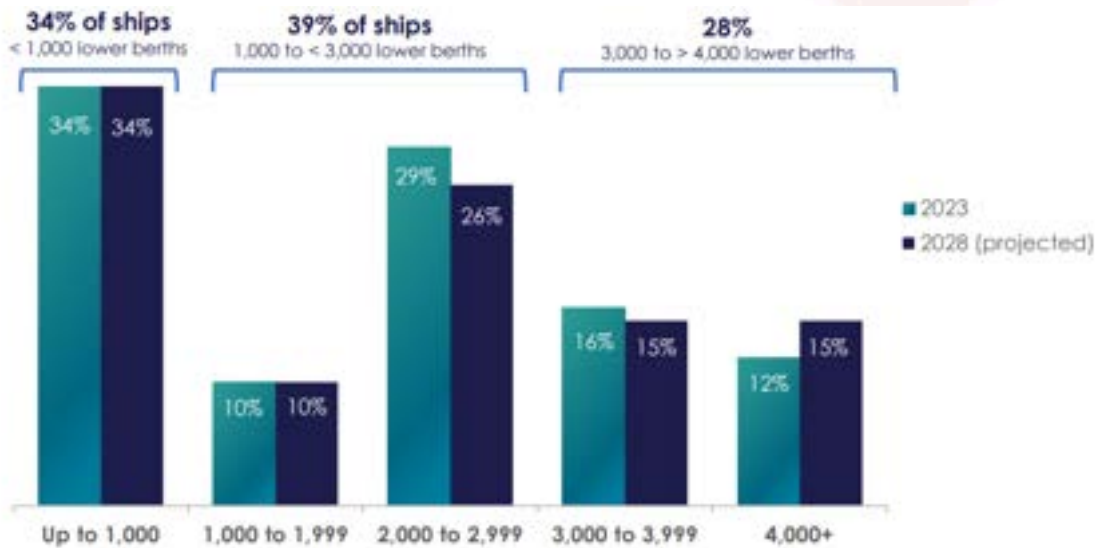


Source: Own elaboration with market information and Royal Caribbean data

These categories are approximate and may vary depending on the cruise line and the specific design of each ship.

The figure below shows that in 2023, the global cruise fleet was distributed as follows: **34%** of ships had a capacity of up to 1,000 passengers (small cruises), **10%** held between 1,000 and 1,999 passengers (medium size), **29%** were in the 2,000 to 2,999 range (large cruises), **16%** in the 3,000 to 3,999 range (very large vessels), and **12%** had capacities over 4,000 passengers (mega cruises). By 2028, the fleet is projected to see stability in smaller segments (up to 1,999 passengers) but a slight decline in the 2,000 to 3,999 categories, while **mega ships** with over 4,000 passengers are **expected to grow to 15%**, reflecting a shift toward larger vessels with increased capacity and amenities.

Figure 58. Cruise category breakdown (current and projected)



Source: CLA<sup>29</sup>

Based on the **maximum length** of each cruise ship category and considering that the dock should be approximately 20% longer to allow for proper mooring line arrangements, the required dock lengths can be determined. **For small cruise ships**, with a maximum length of 200 meters, the dock should be at least **240 meters long**. **Medium cruise ships**, with a maximum length of 300 meters, require docks of at least **360 meters**. **Large cruise ships**, measuring up to 350 meters, need docks of **420 meters**, while **mega cruise ships**, with a maximum length of 365 meters, require docks of at least **450 meters**. This ensures the safe and efficient mooring of ships across all categories.

Another determining factor is the **number of simultaneous calls** that may occur, which establishes the required **number of berths**. In many ports within the region, it is common to observe two simultaneous calls, with the possibility of reaching up to five on the same day.

Determining the optimal **size of terminal building** is essential for efficiently handling passenger movements and associated logistics. While specific standards may vary depending on regional guidelines and port configurations, a general benchmark suggests allocating approximately **1.5 to 2 m<sup>2</sup> per passenger**. This space accounts for areas such as passenger terminals, waiting lounges, check-in counters, baggage handling zones, and security checkpoints.

For instance, a cruise ship accommodating 3,000 passengers would require a landside operational area ranging from 4,500 to 6,000 m<sup>2</sup> to ensure smooth operations and passenger comfort. It is important to note that these figures are approximate and should be adjusted based on specific port layouts, the presence of additional amenities, and the expected flow of passengers during peak times. Additionally, many small cruise terminals in transit ports do not have a permanent and/or proper terminal building.

For mega cruises with a capacity of 7,500 passengers, the terminal building must be dimensioned to accommodate both the peak flow of passengers and the associated operations. Using the standard benchmark of 1.5 to 2 m<sup>2</sup> per passenger for terminal facilities, the building should provide an operational area of approximately 11,250 to 15,000 square meters or even more in case of simultaneity of port calls.

In addition to passenger areas, sufficient space must be allocated for transportation logistics, including parking for buses and taxis, as well as zones for provisioning and refuelling cruise ships. Effective planning and design of these areas are crucial to accommodate the needs of both passengers and service providers, thereby enhancing the overall efficiency and experience at the port. For **landside operations** beyond the terminal building, such as parking areas for buses and taxis, excursion logistics, provisioning zones, and access roads, the required area depends on factors like:

- **Passenger volumes per hour:** Ports handling higher volumes of simultaneous arrivals and departures require proportionally larger staging and circulation areas.
- **Mode of transportation:** The split between buses, taxis, private cars, or other modes significantly affects spatial requirements.
- **Port configuration:** The spatial layout and flow efficiency of landside areas influence the needed dimensions.

#### **9.5.5.4 Operators (Cruise Lines and Terminal Operators)**

In the cruise market, two key players drive the industry's operations: **terminal operators** and **cruise lines**. Terminal operators manage port facilities and invest in port capacity, focusing primarily on terminal buildings and passenger services, while leaving the core infrastructure development to port authorities. On the other hand, cruise lines invest and operate the vessels and play a crucial role in the commercial development of destinations and itineraries. This is done in close coordination with terminal operators to ensure seamless operations and the successful integration of ports into cruise networks, ultimately enhancing the passenger experience and the attractiveness of destinations.

In the cruise terminal sector, there is a noticeable trend of horizontal concentration, where major global operators are expanding their presence across multiple ports through corporate operations within the same industry.

At the same time, cruise lines have adopted a vertical integration strategy by investing directly in port terminals. This dual approach allows both terminal operators and cruise lines to optimize operations, enhance passenger services, and strengthen their competitive positions in the market.

Among the **leading global cruise terminal operators** in terminals are:

- **Global Ports Holding (GPH):** Recognized as the world's largest independent cruise terminal operator, GPH manages an extensive portfolio of terminals across Europe, Asia, and the Americas. Notably, GPH operates three cruise terminals in the Canary Islands under Las Palmas Port Authority concession, in the ports of Las Palmas, Arrecife (Lanzarote), and Puerto del Rosario (Fuerteventura). In the Mediterranean, Global Ports Holding (GPH) manages several terminals across key countries. In Spain, notable ports include Alicante, Málaga, Valencia, Barcelona, Tarragona, Vigo. In Italy, GPH operates terminals in Cagliari, Catania, Crotona, and Taranto. In Turkey, they manage Bodrum and Ege Port. Other Mediterranean terminals include La Goulette in Tunisia, Valletta in Malta, Lisbon in Portugal, Zadar in Croatia and Port of Adria in Montenegro, catering to Adriatic cruise itineraries. In the Caribbean, GPH has a presence in Antigua (Antigua and Barbuda), Saint Lucia, San Juan (Puerto Rico), and Nassau (Bahamas), serving as key hubs for Caribbean cruise itineraries. In North America, GPH operates the Prince Rupert terminal in Canada, marking a strategic entry into this significant market. In the Asia-Pacific region, GPH manages terminals in Ha Long (Vietnam) and Marina Bay (Singapore), highlighting its reach into growing cruise markets in Asia. In Northern Europe, terminals include Kalundborg in Denmark and Liverpool in the United Kingdom, serving as entry points for Northern European and British Isles cruises.
- **Carnival Corporation:** In addition to being one of the largest cruise lines, Carnival owns and operates several key cruise terminals globally. Examples include the Helix Cruise Center at the Port of Barcelona (Spain), the Santa Cruz de Tenerife Cruise Terminal (the Canary Islands, Spain) in Macaronesia, the Dubai Harbour Cruise Terminal (United Arab Emirates), and the Long Beach Cruise Terminal (California, USA).
- **Royal Caribbean Group:** Beyond its extensive fleet of cruise ships, Royal Caribbean invests in and manages numerous terminals worldwide. Key facilities include Terminal A at Port Miami (USA), serving as a major hub for Caribbean operations; the Cape Liberty Cruise Port in Bayonne, New Jersey (USA), a critical home port for New York-area itineraries; and terminals in Europe such as Terminal G at the Port of Barcelona (Spain) and the newly developed terminal in Ravenna (Italy), both hubs for Mediterranean cruises.
- **MSC Cruises:** MSC has invested heavily in the construction and operation of its own terminals across various markets, including another terminal at the Port of Barcelona (Spain), the Durban Cruise Terminal (South Africa), and a state-of-the-art facility at Port Miami (USA).

This growing trend reflects a strong focus on both horizontal and vertical integration within the cruise industry. Terminal operators and cruise lines are aligning their operations more closely with passenger demand, while cruise lines are strategically investing in key hubs worldwide to optimize logistics and enhance their presence in critical markets.

The cruise market, while largely oriented toward a generalist and mass-market audience, also includes distinct submarkets catering to specific traveller preferences. Generalist cruise lines focus on accessible experiences with large fleets and diverse itineraries. Beyond this, premium cruise lines offer higher levels of service and amenities for a more refined experience, while luxury cruise lines provide exclusivity, personalized services, and high-end amenities. Expedition cruise lines specialize in remote destinations and adventure-focused itineraries with smaller ships, and river cruise lines cater to those seeking intimate, culturally immersive experiences along rivers. This segmentation ensures a wide variety of options, meeting the needs and preferences of different traveller profiles.

Table 55. Type of cruises

Types of Cruises	Description	Companies
<b>Conventional or Generalist Cruise Lines</b>	These companies offer accessible experiences and are aimed at the mass market	<ul style="list-style-type: none"> <li>– Carnival Cruise Line</li> <li>– Royal Caribbean International</li> <li>– MSC Crueros</li> <li>– Norwegian Cruise Line</li> <li>– Costa Crueros</li> <li>– Princess Cruises</li> <li>– Celebrity Cruises</li> <li>– Holland America Line</li> <li>– P&amp;O Cruises</li> <li>– AIDA Cruises</li> </ul>
<b>Premium Cruise Lines</b>	They offer a superior level of service and amenities, aimed at passengers looking for a more refined experience.	<ul style="list-style-type: none"> <li>– Cunard Line</li> <li>– Oceania Cruises</li> <li>– Azamara</li> <li>– Windstar Cruises</li> <li>– Viking Ocean Cruises</li> </ul>
<b>Luxury Cruise Lines</b>	They focus on providing exclusive experiences with personalized attention and high-end services.	<ul style="list-style-type: none"> <li>– Seabourn Cruise Line</li> <li>– Silversea Cruises</li> <li>– Crystal Cruises</li> <li>– Ponant</li> <li>– SeaDream Yacht Club</li> <li>– Regent Seven Seas Cruises</li> </ul>
<b>Expedition Cruise Lines</b>	Specializing in trips to remote and adventure destinations, with	<ul style="list-style-type: none"> <li>– Hurtigruten</li> <li>– Lindblad Expeditions</li> </ul>

Types of Cruises	Description	Companies
	smaller ships and a focus on exploration.	<ul style="list-style-type: none"> <li>– Quark Expeditions</li> <li>– Aurora Expeditions</li> <li>– Scenic Eclipse</li> <li>– Hapag-Lloyd Cruises</li> </ul>
<b>River Cruise Lines</b>	They operate on rivers and offer more intimate experiences focused on cultural destinations.	<ul style="list-style-type: none"> <li>– Viking River Cruises</li> <li>– AmaWaterways</li> <li>– Uniworld Boutique River Cruise Collection</li> <li>– Avalon Waterways</li> <li>– Tauck River Cruises</li> </ul>

Source: Own elaboration

While there is a wide variety of cruise types and companies catering to different market segments, as analysed above, the cruise industry shows a remarkable degree of concentration. The most significant players dominate a substantial portion of the market, offering extensive fleets and diverse itineraries. These leading companies are outlined below:

- **Carnival Corporation** is the largest cruise operator globally, with a fleet of **27 ships**. In 2022, the global cruise industry, led by Carnival, generated approximately \$13.6 billion in revenue, with the U.S. as the largest contributor in terms of paying passengers. It is estimated that it served **12 million cruise passengers** in 2023 (≈38% of the market).
- **Royal Caribbean Group** operates **28 ships** as of 2024, with four additional vessels on order and two more planned. It is estimated that the company controlled 14% of the global cruise market by revenue. It is estimated that it served **8 million cruise passengers** in 2023 (≈25% of the market).
- **MSC Cruises** is one of the fastest-growing cruise operators, with a strong focus on expanding its fleet and global reach. MSC currently operates **22 ships**, with plans for new vessels in the near future. Its modern fleet and focus on sustainability make it a prominent player in the cruise industry. In recent years, MSC has prioritized expanding its presence in key markets such as Europe, the Caribbean, and Asia, serving **4 million cruise passengers** in 2023 (≈13% of the market).
- **Norwegian Cruise Line**, the fourth-largest cruise company globally with **19 ships**, has a robust presence in the market. Like its competitors, it contributed to the global industry's \$13.6 billion revenue in 2022. In 2023, Norwegian played a key role in serving **3 million cruise passengers** (≈9% of the market).



These companies collectively represent the dominant forces in the cruise industry, commanding a substantial share of global capacity and shaping market trends and offerings. The top two alone account for over 60% of the passenger market, while this group of four cruise lines collectively controls approximately 85% of the total market share.

The figures below show how four cruise operators craft diverse itineraries, connecting islands within Macaronesia or Martinique to other Caribbean ports. This approach not only allows travellers to explore multiple destinations within a single trip but also highlights the regional diversity and interconnectedness of these islands, catering to various interests such as cultural, ecological, or leisure-focused experiences.

- **Route 1: Martinique and the Caribbean:** The first itinerary focuses on the Caribbean, connecting Martinique with surrounding islands, such as Antigua, St. Kitts, Guadeloupe, St. Maarten, and Tortola. This route offers travellers a rich cultural and scenic journey through the Eastern Caribbean, visiting ports known for their vibrant local heritage, beautiful beaches, and historical significance.
- **Route 2: The Canary Islands and Madeira (Funchal):** The second itinerary links Funchal in Madeira with key Canary Islands destinations like Santa Cruz de Tenerife, Las Palmas, and Arrecife. Additionally, it includes a stop at Agadir, Morocco, showcasing a mix of Atlantic Island culture and North African influences.
- **Route 3: Island-Hopping within Macaronesia:** The third itinerary is a closer exploration of Macaronesia, connecting the Canary Islands (La Gomera, Tenerife, Las Palmas, Santa Cruz de La Palma, and Arrecife) with Madeira (Funchal).

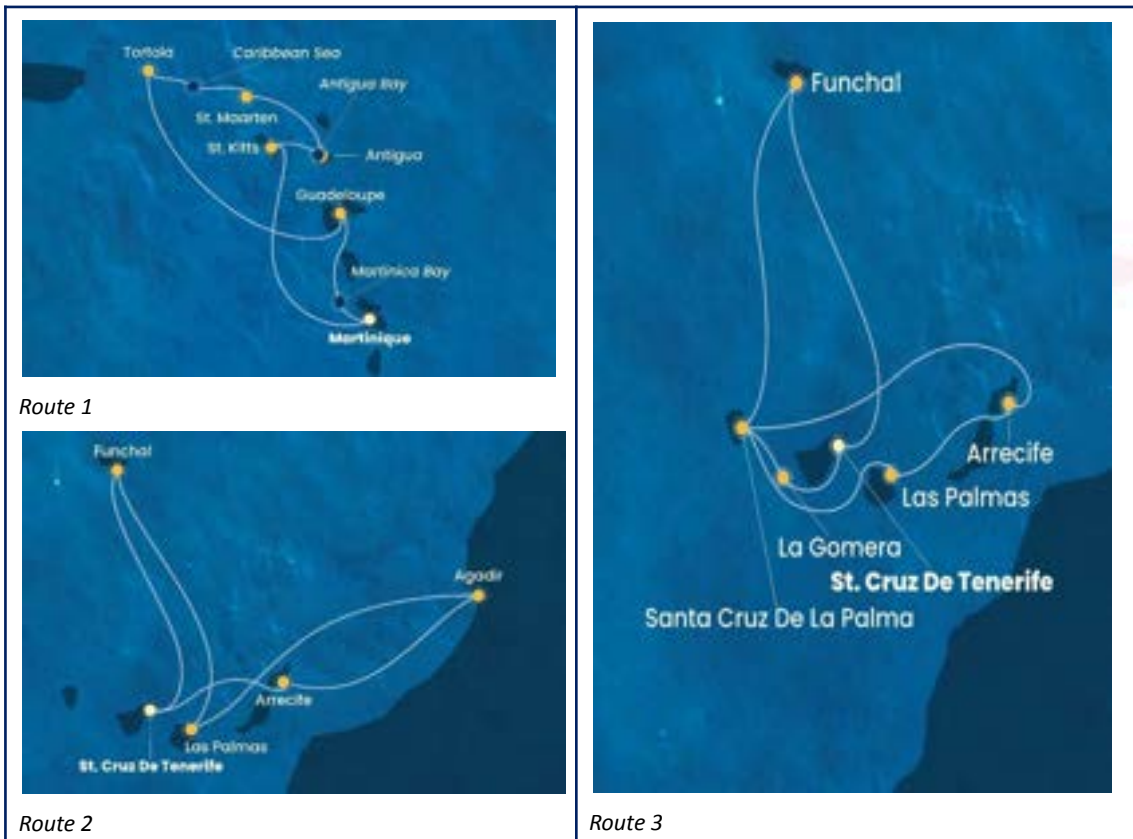
Another dimension of itineraries offered by operators is focussed on routes that connect the Canary Islands, Madeira, and the Azores with mainland ports in the Iberian Peninsula and, in some cases, Northern Europe and Africa. These itineraries cater to travellers seeking longer voyages, blending extended sea days with diverse cultural and scenic stops.

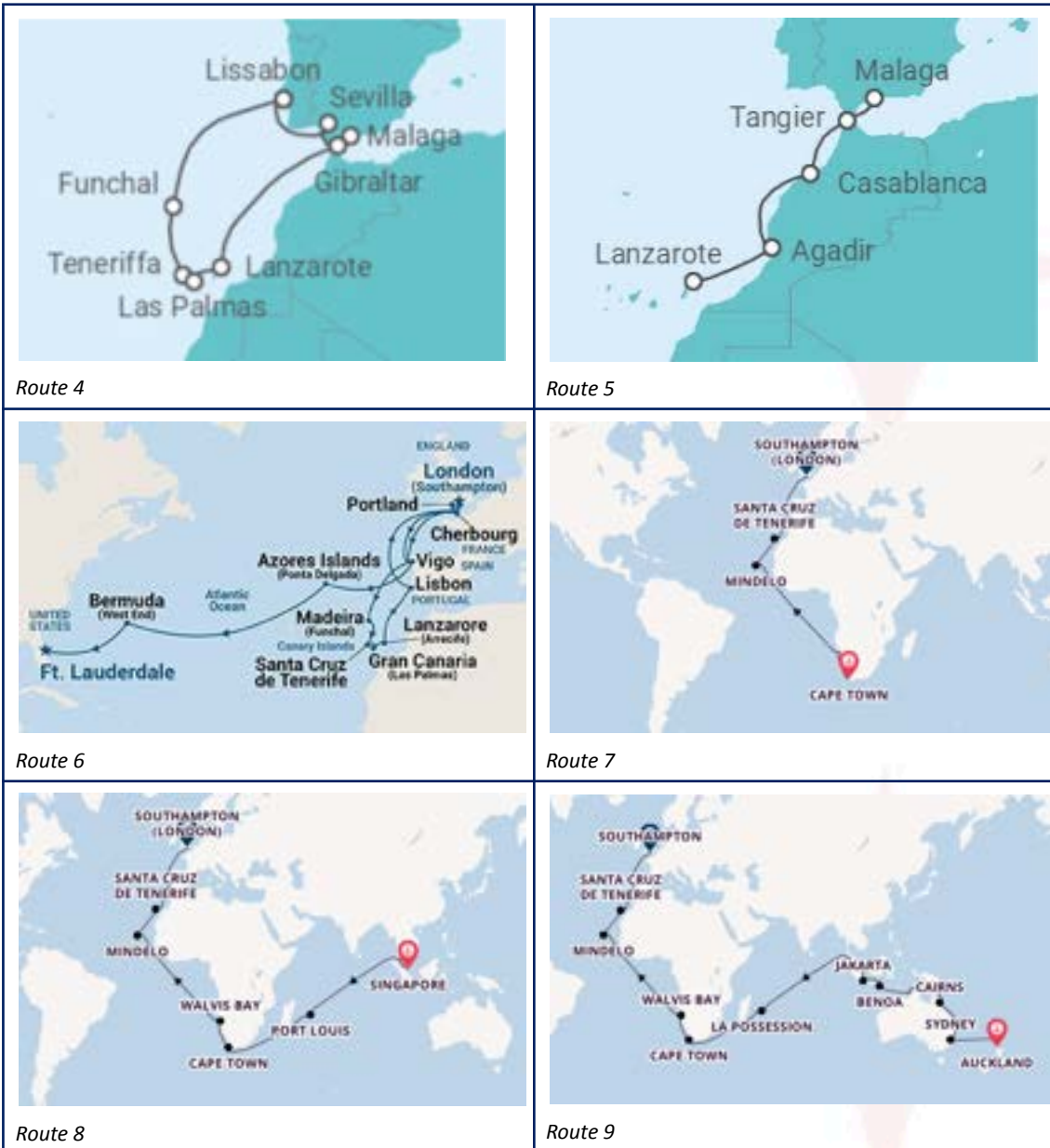
- **Route 4: The Canary Islands, Madeira, and the Iberian Peninsula:** This itinerary links the Canary Islands (Lanzarote, Las Palmas, and Tenerife) with Madeira (Funchal) and prominent ports in the Iberian Peninsula, such as Lisbon, Seville, Málaga, and Gibraltar.
- **Route 5: North Africa and the Iberian Peninsula:** The second route connects Lanzarote in the Canary Islands with North African destinations such as Tangier, Casablanca, and Agadir before continuing to Málaga.

Some cruise itineraries are significantly longer, offering transoceanic journeys that connect England with far-flung destinations such as the Caribbean, South Africa, Australia, or Singapore, while strategically incorporating stops in the Canary Islands and other ports in the region. These itineraries appeal to travellers seeking extended adventures across multiple continents, showcasing the importance of the Canary Islands ports as key links in global cruise networks.

- **Route 6: England to the Caribbean and Beyond (Ft. Lauderdale):** This cruise departs from London (Southampton) and traverses the Atlantic Ocean, making stops at the Azores (Ponta Delgada), Madeira (Funchal), the Canary Islands (Santa Cruz de Tenerife, Gran Canaria, Lanzarote), Lisbon, and Vigo in Spain, before heading to Cherbourg (France), Portland (England), and finally reaching Ft. Lauderdale, USA.
- **Route 7: England to South Africa (Cape Town):** Starting in Southampton, this route travels south, stopping in Santa Cruz de Tenerife in the Canary Islands, Mindelo (Cape Verde), and Walvis Bay (Namibia), before reaching Cape Town, South Africa.
- **Route 8: England to Singapore:** Departing from Southampton, this itinerary explores Santa Cruz de Tenerife, Mindelo, and Walvis Bay, before visiting Port Louis in Mauritius and concluding in Singapore.
- **Route 9: England to Australia (Auckland):** Beginning in Southampton, this extended journey stops in Santa Cruz de Tenerife, Mindelo, Walvis Bay, La Possession (Réunion Island), and Cape Town. The cruise then continues to Jakarta (Indonesia), Benoa (Bali), Cairns and Sydney in Australia, and finally reaches Auckland, New Zealand.

Figure 59. Typical Cruise Itineraries





Source: Information from different tour operators on internet

### 9.5.6 Leisure tourist activities linked to the sea

The ocean provides a wealth of opportunities for unique and enriching leisure experiences, blending adventure, education, and sustainability. Among the most sought-after activities are **cetacean watching**, where visitors can marvel at whales, dolphins, and other marine wildlife in their natural habitat, guided by experts who emphasize conservation and ecological awareness. For underwater enthusiasts, **diving experiences** offer a chance to explore vibrant coral reefs, encounter diverse marine species, and connect with the underwater world like never before. Additionally, the growing trend of **astrotourism on board** combines the tranquillity of the sea with celestial wonder, allowing travellers to stargaze far from urban light pollution, often

accompanied by expert astronomers who provide insights into the night sky. These activities not only create unforgettable memories but also foster a deep appreciation for the natural world and its preservation.

Some of these activities, such as whale and dolphin watching, have a long-standing tradition, with well-established operators and practices that reflect years of experience and a strong focus on sustainability. In contrast, emerging activities like astrotourism on board are relatively new, offering innovative experiences that are still in varying stages of development across the regions analysed.

These activities are frequently complemented by other offerings detailed in the report, such as **boat rentals and charters**, providing flexibility and exclusivity for travellers seeking to customize their marine experiences, or **shore excursions tied to cruise packages**, which seamlessly integrate sea-based adventures into broader itineraries. Together, these experiences create a multifaceted approach to leisure tourism, ensuring unforgettable memories while fostering a deeper appreciation for marine and celestial environments.

**Tour operators** play a crucial role in consolidating and promoting sea-related nautical activities, providing tourists and visitors with the opportunity to explore and book these experiences. By offering a portfolio of activities, they simplify the discovery and selection process for options tailored to different preferences and skill levels. Many of these operators provide online platforms where travellers can browse, compare, and book experiences in advance, ensuring a seamless and enjoyable vacation. This integration of activities into broader tourism packages not only enhances the visitor experience but also supports local providers by increasing their visibility and demand.

These sea-based leisure activities are designed to cater not only to tourists seeking unique experiences but also to the local population and island residents. For visitors, these activities provide a memorable way to connect with the islands' natural beauty and marine ecosystems. For locals, they offer an opportunity to rediscover their surroundings, engage in sustainable tourism practices, and foster a deeper connection to their cultural and environmental heritage. This **dual approach** ensures inclusivity and promotes the value of preserving the islands' unique marine and celestial environments for both residents and visitors alike.

#### **9.5.6.1 Whale and dolphin watching**

Whale and dolphin watching is a deeply ingrained activity in coastal regions, offering a unique blend of recreation, education, and ecological exploration. It has gained significant traction in areas renowned for their rich marine biodiversity and the presence of diverse cetacean species. The study area, including the Canary Islands, the Azores, Madeira, and the French Caribbean islands, is home to some of the most exceptional whale and dolphin watching opportunities in the world. These regions are characterized by their nutrient-rich waters, favourable migration routes, and year-round populations of iconic species like sperm whales, pilot whales, and various dolphin species. This activity not only highlights the natural richness of these areas but also plays a crucial role in promoting sustainable tourism and fostering awareness of marine conservation among locals and visitors alike.



Figure 60. Complementary activities to diving. Underwater photography and spearfishing



This activity is closely linked to the chartering of crewed boats and organized excursions, offering a range of options tailored to the preferences and budgets of tourists. Excursions are conducted on vessels of varying sizes, from small, intimate boats for personalized experiences to larger vessels capable of accommodating groups. These options allow visitors to choose between more exclusive encounters or more affordable group excursions, ensuring accessibility for all. The collaboration between whale-watching operators and boat charter companies not only enhances the tourist experience but also creates synergies within the local maritime tourism sector, contributing to the overall economic vitality of the region.

#### Commercial overview

The prices of whale and dolphin watching tours vary depending on the region and type of experience. In Madeira, standard prices range typically between €40 and €60 per adult, while exclusive or private tours can exceed €100 per person. In the Azores, rates typically range from €50 to €70, with personalized or private boat tours being more expensive. In the Canary Islands, regular excursions are affordable, costing between €30 and €50, but catamaran or luxury experiences can go up to €100. In the French Caribbean, prices range from €40 to €80, especially in Martinique and Guadeloupe, depending on the exclusivity of the tour.

The duration of the activities also varies slightly. Standard tours in Madeira, the Azores, and the Canary Islands usually last between 2 and 3 hours. In the French Caribbean, these activities can extend to half a day or a full day, combining whale watching with snorkelling or beach visits. Private or exclusive experiences, such as those offered by companies in Madeira and the Canary Islands, can last between 4 and 6 hours, tailored to the client's interests.

Regarding included services, all tours provide specialized guides, often marine biologists or naturalists, who educate participants about the observed species and marine conservation. Companies also provide basic safety equipment like life jackets and, in some cases, snorkelling gear. Longer tours often include meals and beverages on board. Some experiences, particularly in Madeira and the Azores, allow swimming with dolphins, always in compliance with local regulations. Submarine viewing boats are also a popular option in the Canary Islands and the Caribbean.

Commercial policies reflect flexibility and sustainability. Most companies allow online bookings and offer discounts for early purchases or large groups. Cancellation policies often include full refunds if weather conditions force activity suspension. Additionally, prices for children are

generally lower, with discounts ranging from 20% to 50% of the regular price. Many companies promote sustainable practices, such as minimizing environmental impact and limiting direct interactions with marine wildlife.

Finally, each region has its unique characteristics. Madeira is known for its catamaran tours and luxury experiences. The Azores prioritize sustainability and environmental education, with diverse offerings depending on the island. In the Canary Islands, the wide range of companies allows visitors to choose between budget-friendly options and exclusive experiences. The French Caribbean integrates activities like snorkelling and beach visits, offering a more comprehensive and relaxing approach.

This analysis highlights the variety of experiences available across different regions, catering to the needs and budgets of diverse visitors.

### Sample of companies

The table below showcases a wide range of companies across the Canary Islands offering whale and dolphin watching experiences. These operators specialize in eco-friendly tours guided by marine biologists and local experts, combining education, sustainability, and cultural insights. Whether it is aboard catamarans, traditional boats, or vessels with underwater viewing capabilities, visitors can explore the rich marine biodiversity of islands such as Tenerife, Gran Canaria, La Palma, Lanzarote, Fuerteventura, el Hierro and La Gomera. These experiences are ideal for nature enthusiasts seeking unforgettable encounters with marine life in a responsible and enriching way.

Table 56. Whale and dolphin watching in the Canary Islands. Sample of companies

Company	Description of services and website to contact them	Island
Bonadea II	It offers ecological whale watching tours in the south of Tenerife, with more than 29 years of experience in responsible observation of marine fauna. <a href="https://bonadea2catamaran.com/web/">https://bonadea2catamaran.com/web/</a>	Tenerife
Ocean Explorer	Take sea excursions to see cetaceans on La Palma, with marine biologist guides and visits to coastal points of interest. <a href="https://oceanexplorer.es/">https://oceanexplorer.es/</a>	La Palma
Multiacuatic	Dedicated exclusively to whale watching, it has the Blue Flag distinction and guides specialized in the marine life of the Canary Islands. <a href="https://dolphinwhales.es/">https://dolphinwhales.es/</a>	Gran Canaria
Spirit of the Sea	It offers dolphin and whale watching excursions in Gran Canaria, with daily departures from Puerto Rico. <a href="https://www.tour2b.com/es/experiencias/avistamiento-de-delfines-y-ballenas-en-gran-canaria-spirit-of-the-sea/">https://www.tour2b.com/es/experiencias/avistamiento-de-delfines-y-ballenas-en-gran-canaria-spirit-of-the-sea/</a>	Gran Canaria
Mar de Ons Tenerife	It organises whale and dolphin watching excursions in Tenerife, providing information about the species sighted and their conservation. <a href="https://www.mardeonstenerife.com/es/">https://www.mardeonstenerife.com/es/</a>	Tenerife
Senda Ecoway	It offers whale watching experiences in Gran Canaria, combining the observation of marine fauna with visits to places of cultural interest. <a href="https://sendaecoway.com/experiencias/avistamiento-cetaceos-gran-canaria-puerto-mogan/">https://sendaecoway.com/experiencias/avistamiento-cetaceos-gran-canaria-puerto-mogan/</a>	Gran Canaria



Company	Description of services and website to contact them	Island
Turmar Canarias	Federation that brings together companies dedicated to tourist and recreational activities on the Canary coast, including whale watching. <a href="https://turmarcanarias.com/">https://turmarcanarias.com/</a>	Canarias
Fancy Submarine Vision	Make maritime excursions with underwater vision for whale watching in La Palma. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	La Palma
OKLanzarote	It offers whale watching tours on the island of Lanzarote, with specialized guides and a focus on marine conservation. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	Lanzarote
Bahía Cat	It organizes catamaran excursions for whale watching in Gran Canaria, offering a comfortable and educational experience. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	Gran Canaria
Nemo La Palma	It provides whale watching trips from the Tzacorte Marina, with personalized attention and respect for the environment. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	La Palma
Eden Catamarán	It offers catamaran excursions for whale and dolphin watching in Tenerife, with a focus on sustainability and environmental education. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	Tenerife
Shogun	Take whale watching tours on an oriental-style boat, providing a unique experience in the waters of Tenerife. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	Tenerife
Fuerteventura Full Experience	Organize whale watching trips in Fuerteventura, with expert guides and commitment to marine conservation. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	Fuerteventura
Ascensión del Señor	It offers whale watching excursions in La Gomera, combining marine wildlife observation with cultural activities. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	La Gomera
Traum Fuerteventura	It provides whale watching experiences in Fuerteventura, with a focus on ecotourism and environmental education. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	Fuerteventura
OkFuerteventura	It offers whale watching tours in Fuerteventura, promoting sustainable practices and respect for the marine environment. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	Fuerteventura
OkGranCanaria	It organises whale watching excursions in Gran Canaria, with specialised guides and commitment to conservation. <a href="https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/">https://www.holaislascanarias.com/avistamiento-de-ballenas-y-delfines/</a>	Gran Canaria

Source: Own elaboration

The table below highlights a variety of companies offering marine wildlife experiences across the Azores archipelago. These services include whale and dolphin watching, diving, and eco-tourism activities, often guided by marine biologists and local experts. With a focus on sustainability and education, these operators provide unique opportunities to explore the diverse marine life around islands such as São Miguel, Pico, Terceira, Faial, Corvo, São Jorge, and Flores.

Table 57. Whale and dolphin watching in the Azores. Sample of companies

Company	Description of services and website to contact them	Island
Futurismo Azores Adventures	It offers whale and dolphin watching excursions with marine biologists, promoting education and conservation. <a href="https://www.futurismo.pt/es/visitas/avistamiento-de-cetaceos-en-ponta-delgada-sao-miguel-azores/">https://www.futurismo.pt/es/visitas/avistamiento-de-cetaceos-en-ponta-delgada-sao-miguel-azores/</a>	São Miguel
Picos de Aventura	Specialized in maritime and nature activities, including whale watching and diving experiences. <a href="https://www.picosdeaventura.com/">https://www.picosdeaventura.com/</a>	São Miguel
Terra Azul	It offers whale watching tours and boat trips around the islets, with a focus on sustainability. <a href="https://www.azoreswhalewatch.com/">https://www.azoreswhalewatch.com/</a>	São Miguel
OceanEmotion	It provides whale and dolphin watching experiences, as well as customized tours on the island. <a href="https://www.oceanemotion.pt/">https://www.oceanemotion.pt/</a>	Terceira
CW Azores	Dedicated to whale watching and diving activities, with emphasis on environmental education. <a href="https://www.cwazores.com/">https://www.cwazores.com/</a>	Pico
Espírito Azul	It offers whale watching excursions and boat trips, highlighting the local marine biodiversity. <a href="https://www.espiritoazul.com/">https://www.espiritoazul.com/</a>	Faial
Nauticorvo	It provides whale watching tours and nautical activities, with experienced local guides. <a href="https://www.nauticorvo.pt/">https://www.nauticorvo.pt/</a>	Corvo
Futurismo Azores Adventures	In addition to São Miguel, it operates in Pico offering whale watching and nature activities. <a href="https://www.futurismo.pt/">https://www.futurismo.pt/</a>	Pico
Sea Adventures	It offers whale watching experiences and maritime tours, promoting ecotourism. <a href="https://www.seadventures.pt/">https://www.seadventures.pt/</a>	São Jorge
Flores Dive Center	It provides diving and whale watching activities, focusing on marine conservation. <a href="https://www.floresdivecenter.com/">https://www.floresdivecenter.com/</a>	Flores

Source: Own elaboration

The table below features a variety of companies specializing in marine wildlife experiences in Madeira and Porto Santo. These services include dolphin and whale watching, birdwatching, catamaran tours, and even the chance to swim with dolphins, all guided by expert biologists and professionals. With a strong emphasis on sustainability, education, and customer experience, these operators provide an ideal way to explore the rich marine biodiversity and stunning landscapes of the region, ensuring memorable adventures for nature enthusiasts and eco-conscious travellers alike.

Table 58. Whale and dolphin watching in Madeira. Sample of companies

Company	Description of services and website to contact them	Island
Rota dos Cetáceos	It offers speedboat excursions with biologists on board, including the possibility of swimming with dolphins. <a href="https://rota-dos-cetaceos.pt/">https://rota-dos-cetaceos.pt/</a>	Madeira
Lobosonda	Company responsible for whale watching, focused on the education and sustainability of the activity. <a href="https://www.lobosonda.com/">https://www.lobosonda.com/</a>	Madeira
Magic Dolphin Sea Safaris	It offers speedboat excursions for whale watching, providing an adventurous experience. <a href="https://www.magic-dolphin.com/">https://www.magic-dolphin.com/</a>	Madeira
VipDolphins	It provides luxury whale and dolphin watching experiences, with exclusive services on board. <a href="https://www.vipdolphins.com/">https://www.vipdolphins.com/</a>	Madeira
Seaborn Catamaran	Take catamaran rides for whale watching, offering comfort and stability during the trip. <a href="https://www.seaborn.pt/">https://www.seaborn.pt/</a>	Madeira
VMT Madeira	It offers catamaran excursions for dolphin and whale watching, with the possibility of swimming in summer. <a href="https://www.vmtmadeira.com/">https://www.vmtmadeira.com/</a>	Madeira
H2oMadeira	Specialized in whale watching tours and marine activities, with a focus on conservation and environmental education. <a href="https://www.h2omadeira.com/">https://www.h2omadeira.com/</a>	Madeira
On Tales	It offers personalized whale watching experiences in small boats, focused on sustainability. <a href="https://www.ontales.com/">https://www.ontales.com/</a>	Madeira
Madeira Wind Birds	Organize excursions for seabird and cetacean watching, combining both experiences in one tour. <a href="https://www.madeirawindbirds.com/">https://www.madeirawindbirds.com/</a>	Madeira
Ventura do Mar	It provides boat trips for whale watching, with guides specialized in marine biology. <a href="https://www.venturadomar.com/">https://www.venturadomar.com/</a>	Madeira
Mar Dourado	It offers boat trips around Porto Santo to observe dolphins and other marine fauna, highlighting the crystal-clear waters and golden sand of the island. <a href="https://visitmadeira.com/pt/o-que-fazer/amantes-de-mar/atividades/observacao-de-cetaceos/observacao-de-cetaceos-no-porto-santo/">https://visitmadeira.com/pt/o-que-fazer/amantes-de-mar/atividades/observacao-de-cetaceos/observacao-de-cetaceos-no-porto-santo/</a>	Porto Santo

Source: Own elaboration

The following table highlights a selection of companies offering a variety of marine wildlife experiences across different French islands in the Caribbean (Guadeloupe, Martinique, Saint Barthélemy, and Saint Martin). These services include whale and dolphin watching, snorkelling, diving, and eco-tourism activities, often with a focus on marine conservation and education.

Table 59. Whale and dolphin watching in French Caribbean Islands. Sample of companies

Company	Description of services and website to contact them	Island
Les Heures Saines	It offers whale and dolphin watching excursions, as well as diving activities, with a focus on marine conservation. <a href="https://www.heures-saines.gp/">https://www.heures-saines.gp/</a>	Guadelupe
Yalus	Specialized in outings to observe cetaceans and sea turtles, promoting ecotourism and environmental education. <a href="https://www.yalus.fr/">https://www.yalus.fr/</a>	Martinique
Nautica Air Services	It provides whale watching tours and scenic flights, offering a unique perspective of marine wildlife. <a href="https://www.nauticaairservices.com/">https://www.nauticaairservices.com/</a>	San Bartolomé
Blue Odyssey	It offers sailing and whale watching experiences, combining luxury and sustainability in its services. <a href="https://www.blueodyssey.com/">https://www.blueodyssey.com/</a>	San Martín
Caraïbes Evasion	It organizes maritime excursions for dolphin and whale watching, with guides specialized in marine biology. <a href="https://www.caraibes-evasion.com/">https://www.caraibes-evasion.com/</a>	Guadelupe
Dauphins Caraïbes	Dedicated to responsible dolphin and whale watching, promoting awareness and protection of cetaceans. <a href="https://www.dauphins-caraibes.com/">https://www.dauphins-caraibes.com/</a>	Martinique
Antilles Sail	It offers private charters and excursions for whale watching, combining navigation and ecotourism. <a href="https://www.antilles-sail.com/">https://www.antilles-sail.com/</a>	Guadelupe
Bleu Marine Excursions	Specialized in whale watching and snorkelling outings, focusing on environmental education. <a href="https://www.bleumarine-excursions.com/">https://www.bleumarine-excursions.com/</a>	San Martín
Madisail	It provides catamaran excursions for whale watching, offering a combined experience of sailing and marine discovery. <a href="https://www.madisail.com/">https://www.madisail.com/</a>	Martinique
Caribbean Cetacean society	Non-profit Non-Governmental Organization (“NGO”) created by Caribbean people in 2020. Their mission is to improve cetacean conservation within the Wider Caribbean Region and beyond. They works on different projects of cooperation, research, conservation and education. <a href="https://www.ccs-ngo.com/?lang=es">https://www.ccs-ngo.com/?lang=es</a>	Martinique
Guadeloupe Evasion Découverte	It organizes whale watching outings and nautical activities, with a focus on respect for the environment. <a href="https://www.guadeloupe-evasion-decouverte.com/">https://www.guadeloupe-evasion-decouverte.com/</a>	Guadelupe

Source: Own elaboration

### Pricing scheme and services

Whale and dolphin watching companies in the Canary Islands offer a variety of experiences tailored to different budgets and service levels. Prices typically range from **€25 to €70 per person**, depending on the duration and included services. Basic **2-hour excursions** cost around **€25 to €30**, providing opportunities to observe dolphins and whales in their natural habitat. More comprehensive experiences of **4-hour tours**, which include drinks and swimming stops,

are priced between **€50 and €70**. Private or personalized tours are also available at higher rates, ideal for families or groups seeking exclusivity. All tours emphasize sustainability and respect for the marine environment.

Whale and dolphin watching companies in Madeira and the Azores offer a range of experiences tailored to different budgets and preferences. Prices typically range from **€35 to €65 per person**, depending on the duration and type of tour. In Madeira prices typically cost around **€50**. For a more complex options for some companies combines marine tours with diving experiences, priced at around **€65**.

Whale and dolphin watching companies in Guadeloupe, Martinique, Saint Barthélemy, and Saint Martin offer a variety of experiences tailored to different preferences and budgets. Prices typically range from **€50 to €90 per person**, depending on the duration and services included. In Guadeloupe, **it is** provided eco-friendly excursions focusing on marine conservation, with prices starting around **€50-55**. In Martinique can be found specialized experiences in observing cetaceans and sea turtles, promoting ecotourism and environmental education, with excursions priced from **€60- €65**. In Saint Barthélemy companies provide unique experiences combining cetacean watching with panoramic flights, offering a distinctive perspective of marine wildlife, with packages starting around **€80**. In Saint Martin, it is typically combined luxury sailing with sustainability, offering navigation and cetacean observation experiences starting at **€90**.

#### **9.5.6.2 Diving activities**

Scuba diving is an activity deeply rooted in coastal regions, combining recreation, sport, and exploration. It has established a strong presence in areas with exceptional marine biodiversity and unique underwater landscapes. The study area, encompassing the Canary Islands, the Azores, Madeira, and the French Caribbean islands, boasts some of the most remarkable diving spots worldwide. These locations are characterized by their volcanic underwater topography, crystal-clear waters, and abundant marine life, making them highly attractive to both amateur and professional divers. The tradition of diving in these regions is not only a reflection of their natural wealth but also a vital component of their tourism appeal and local economies.

Figure 61. Diving activities



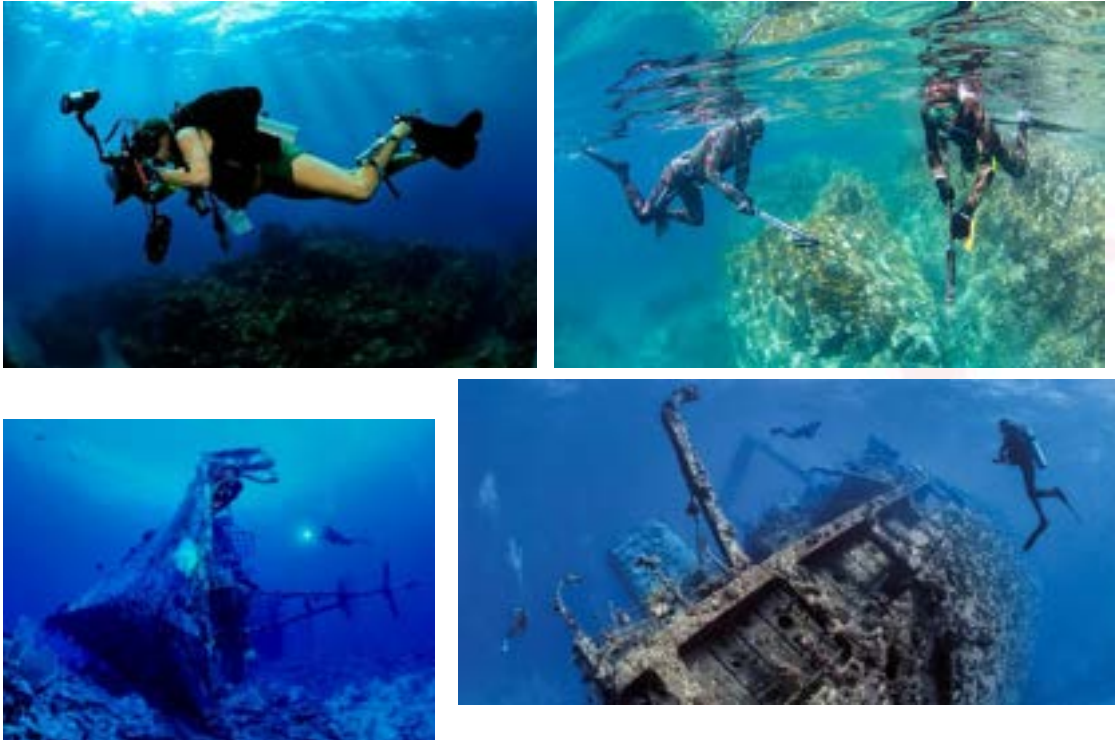
The diving industry in these areas is notably fragmented due to relatively low entry costs, with the main capital investment often being limited to essential diving equipment and certifications. However, the exception lies in the cost of boats, which represent a significant financial burden for many operators. To address this, it is common for diving companies to outsource boats from chartering enterprises rather than owning them outright. This dynamic fosters synergies and complementarities between the diving and chartering sectors, enabling both industries to thrive. These collaborations not only optimize resources but also enhance the range of services available to diving enthusiasts, creating a robust and interconnected tourism ecosystem.

Scuba diving is often complemented by various underwater activities that enhance the marine experience. Among these are spearfishing or underwater photography, and snorkelling. Spearfishing allows enthusiasts to sustainably capture local species, while underwater photography offers a chance to document the rich marine biodiversity and unique geological formations of these areas. Snorkelling provides an accessible option for exploring shallow waters and observing marine life.

Additionally, activities such as freediving, technical diving, and cave diving are also popular, attracting adventurers seeking greater challenges and a deeper connection with the underwater environment. The combination of these activities not only diversifies the tourism offerings but also promotes a broader appreciation of marine ecosystems and encourages sustainable exploration practices.



Figure 62. Complementary activities to diving. Underwater photography, archaeological and spearfishing



### Overview of Diving Companies and Their Offerings

**Diving courses** are foundational services provided by these companies. They are usually designed to cater to different skill levels:

- Beginner Courses: For individuals with little or no prior experience, these often include introductory sessions like "Discover Scuba Diving," which provide hands-on training in controlled environments such as shallow waters or pools.
- Intermediate and Advanced Courses: These courses build on basic skills and introduce divers to more challenging environments. Examples include Advanced Open Water Diver courses, underwater navigation, and night diving.
- Specialized Training: Some centres offer niche programs, such as deep diving, wreck diving, or underwater photography.

Many diving centres operate under internationally recognized organizations like PADI<sup>30</sup>, SSI<sup>31</sup>, or CMAS<sup>32</sup>, offering **certification programs** that allow divers to progress through skill levels. These

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<sup>30</sup> PADI: Professional Association of Diving Instructors

<sup>31</sup> SSI: Scuba Schools International

<sup>32</sup> CMAS: Confédération Mondiale des Activités Subaquatiques

certifications are critical for divers who wish to participate in more advanced excursions or rent diving equipment independently.

Popular certifications include:

- Open Water Diver: The entry-level certification that qualifies divers to explore open water up to 18 meters.
- Advanced Open Water Diver: Allows divers to explore greater depths (up to 30 meters) and participate in specialized dives.
- Rescue Diver and Professional Certifications: Includes rescue techniques and first aid, with some centres offering professional training programs like Divemaster or Instructor certifications.

These companies also organize **guided diving trips** to popular underwater sites. Excursions are typically designed to showcase the region's unique marine biodiversity and landscapes, such as coral reefs, underwater caves, or shipwrecks. Some common types of excursions include:

- Recreational Dives: Designed for certified divers looking to explore local dive spots.
- Eco-Tours: Focus on environmental awareness, allowing divers to observe marine life responsibly.
- Shark or Manta Ray Diving: Highlight encounters with specific marine species.

In addition to core offerings, many companies provide supplementary services to enhance customer experience:

- Snorkelling Tours: For those who prefer surface-level exploration.
- Equipment Rental and Sales: Ensures customers have access to high-quality gear.
- Marine Biology Workshops: Some companies employ marine biologists to lead educational sessions about local ecosystems.
- Boat Charters: Offer private excursions to secluded dive sites.

These companies operate with a dual focus on safety and sustainability:

- Safety First: They emphasize rigorous safety protocols, including equipment maintenance, experienced guides, and small group sizes.

- Environmental Stewardship: Many companies integrate eco-friendly practices into their operations, such as promoting marine conservation and minimizing ecological footprints during dives.

Diving companies play a crucial role in connecting people with the underwater world, offering an array of educational, recreational, and professional services. Their well-structured offerings ensure that divers of all levels can enjoy safe, exciting, and memorable underwater experiences while contributing to the sustainable use of marine environments.

The Canary Islands offer a diverse and well-established selection of diving centers, catering to enthusiasts of all skill levels. From beginner-friendly courses to advanced certifications and unique diving experiences, the region provides access to some of the most stunning underwater landscapes in Europe. Many centers also emphasize ecological and safe diving practices, ensuring a sustainable approach to exploring the marine environment. Below is a representative table showcasing a variety of diving centers across the Canary Islands, detailing their locations and key offerings.

Table 60. Diving Activities in the Canary Islands. Sample of companies

Company Name	Island	Description
Blue Bottom Diving	Tenerife	SSI diving centre offering beginner to advanced courses and guided dives. <a href="https://www.bluebottomdiving.es">https://www.bluebottomdiving.es</a>
Ecological Divers	Tenerife	Focus on safe and ecological diving. Offers SDI and TDI courses. <a href="https://buceo-tenerife.es">https://buceo-tenerife.es</a>
Diving Canarias	Tenerife	Provides shore and boat dives, including underwater scooter dives. <a href="https://divingcanarias.com">https://divingcanarias.com</a>
7 Mares	Gran Canaria	PADI 5-Star IDC centre offering courses from basic to instructor levels. <a href="https://7mares.es">https://7mares.es</a>
Buceo Canarias Dive Center	Gran Canaria	Offers SSI and PADI certifications and beginner-friendly courses. <a href="https://www.buceocanarias.com">https://www.buceocanarias.com</a>
Davy Jones Diving	Gran Canaria	PADI 5* centre offering a variety of courses and dives. <a href="https://divingpass.net">https://divingpass.net</a>
Manta Diving Lanzarote	Lanzarote	PADI 5* centre with a wide range of courses and activities. <a href="https://divingpass.net">https://divingpass.net</a>
Native Diving Lanzarote	Lanzarote	Offers diving courses and unique activities like 'Sea Trek.' <a href="https://divingpass.net">https://divingpass.net</a>
Techno Diving Lanzarote	Lanzarote	Provides courses for all levels and organizes dives. <a href="https://divingpass.net">https://divingpass.net</a>
Abyss Fuerteventura	Fuerteventura	Offers courses for all levels and organizes dives. <a href="https://divingpass.net">https://divingpass.net</a>
Deep Blue Diving	Fuerteventura	PADI 5* center offering courses and daily dives. <a href="https://divingpass.net">https://divingpass.net</a>

Company Name	Island	Description
Fuerte Divers	Fuerteventura	Offers various diving courses and excursions. <a href="https://divingpass.net">https://divingpass.net</a>
Punkfish - La Palma Diving	La Palma	Offers dives directly from the beach and other spots. <a href="https://divingpass.net">https://divingpass.net</a>
Casa de Buceo	La Palma	Provides courses and excursions tailored to experience levels. <a href="https://divingpass.net">https://divingpass.net</a>
La Palma Diving Center	La Palma	Offers courses and activities for all ages. <a href="https://divingpass.net">https://divingpass.net</a>
La Gomera Diving	La Gomera	Offers PADI courses and dives with personalized service. <a href="https://divingpass.net">https://divingpass.net</a>
Gomera Sub	La Gomera	Provides diving courses and excursions for all levels. <a href="https://divingpass.net">https://divingpass.net</a>

Source: Own elaboration

Madeira also offers a range of professional diving centres, providing exceptional opportunities for divers to explore its rich underwater landscapes. With options for all skill levels, these centres specialize in guided dives, training courses, and unique marine experiences in areas like the Garajau Marine Reserve and the biodiverse waters of Caniçal. Many of these centres combine personalized services with sustainable practices, ensuring an unforgettable diving experience in this beautiful Atlantic archipelago. Below is a representative table showcasing key diving centres in Madeira and their distinctive offerings.

Table 61. Diving Activities in Madeira. Sample of companies

Company Name	Location	Description
Azul Diving Center	Funchal	An SSI and PADI diving center offering personalized diving and snorkelling trips, as well as individual training and small group sessions. They conduct daily boat dives to sites like the Garajau Marine Reserve and the Afonso Cerqueira wreck. <a href="https://www.azuldiving.com/es">https://www.azuldiving.com/es</a>
Atalaia Diving Center	Caniço de Baixo	Established in 1988, this center provides a variety of dive sites accessible directly from the shore, with depths ranging from 3 to 30 meters. They offer courses from beginner to Divemaster levels, emphasizing relaxed dives in small groups. <a href="https://atalaiamadeira.com/es/">https://atalaiamadeira.com/es/</a>
Madeira Divepoint	Funchal	Located within the Pestana Hotel Madeira Carlton, this is the only PADI 5-Star Training Resort and Dive Resort in Madeira. They offer direct access to the sea, with both shore and boat dives starting from their location. <a href="https://www.padi.com/es/centro-buceo/portugal/madeira-dive-point-2/">https://www.padi.com/es/centro-buceo/portugal/madeira-dive-point-2/</a>
Manta Diving Madeira	Caniço	A PADI 5-Star IDC center offering a range of courses from beginner to instructor levels. They provide daily dives in the Garajau Marine Reserve and have access to various dive sites suitable for all experience levels. <a href="https://www.mantadivingmadeira.com">https://www.mantadivingmadeira.com</a>

Company Name	Location	Description
Scorpio Madeira Diving Center	Canical	Offers diving experiences in the rich geological and biodiverse waters of Canical. They provide equipment rental, guided dives, and cater to divers of all skill levels. <a href="https://www.scorpimadeira.com/">https://www.scorpimadeira.com/</a>

Source: Own elaboration

The Azores archipelago, located in the mid-Atlantic, is a renowned destination for divers due to its extraordinary marine biodiversity and unique underwater landscapes. Known for its volcanic seascapes, the Azores offer thrilling diving experiences, including encounters with manta rays, whale sharks, and vibrant coral reefs. Famous diving areas include the submerged volcanic craters of São Miguel, the deep waters around Santa Maria, and the marine biodiversity hotspots near Pico and Faial. Below is a representative table highlighting key diving centres across the Azores and their offerings.

Table 62. Diving Activities in the Azores. Sample of companies

Company Name	Island	Description
Best Spot Azores	São Miguel	The only SSI & PADI Dive Resort in the Azores offering certification courses and dives led by marine biologists. <a href="https://es.bestspotazores.com/">https://es.bestspotazores.com/</a>
Mantamaria Dive Center	Santa Maria	Dedicated to training and certifying divers, offering experiences with manta rays and whale sharks. <a href="https://mantamaria.com/es/home">https://mantamaria.com/es/home</a>
Dive Azores	Faial	PADI 5* Dive Centre offering daily trips and courses for all levels, including certification courses. <a href="http://www.diveazores.net">http://www.diveazores.net</a>
Haliotis Faial	Faial	Recognized centre offering certification courses for all skill levels, known for its professional and friendly staff. <a href="https://www.haliotis.pt/en/centers/faial">https://www.haliotis.pt/en/centers/faial</a>
Azores Sub Dive Center	São Miguel	Offers certification courses in recreational and technical diving, focusing on safety and customer satisfaction. <a href="http://www.azoressub.com/">http://www.azoressub.com/</a>
CW Azores	Pico	Offers certification diving courses and trips, including opportunities to dive with sharks. <a href="http://www.cwazores.com/">http://www.cwazores.com/</a>
Octopus Diving Center	Terceira	Offers a range of certification diving courses and trips. <a href="http://www.octopusdivingcenter.com/">http://www.octopusdivingcenter.com/</a>
ScubAzores	São Miguel	Provides certification diving courses, focusing on safety and marine biodiversity exploration. <a href="http://www.scubazores.com/">http://www.scubazores.com/</a>

Source: Own elaboration

The French Caribbean islands, including Martinique, Guadeloupe, Saint Barthélemy, and Saint Martin, are prime destinations for diving enthusiasts, offering exceptional underwater experiences in tropical waters. Known for their crystal-clear visibility, vibrant coral reefs, and rich marine biodiversity, these islands provide diving opportunities for all skill levels, from beginners to advanced divers. Renowned spots include the

Cousteau Reserve in Guadeloupe, the Natural Reserve in Saint Martin, and the Southwest Natural Reserve in Martinique. Below is a representative table showcasing key diving centres and their offerings across these islands.

Table 63. Diving Activities in Martinique. Sample of companies

Company Name	Island	Description
Antilles Sub Diamond Rock	Martinique	Diving centre offering courses for all levels and dive trips in the south of the island. <a href="https://www.antilles-sub.com/">https://www.antilles-sub.com/</a>
Espace Plongée Martinique	Martinique	Provides underwater explorations and training in recreational and technical diving. <a href="http://www.espaceplongee.com/">http://www.espaceplongee.com/</a>
Alpha Plongée Martinique	Martinique	Specializes in diving in the Southwest Natural Reserve of the island. <a href="https://alphaplongee.com/">https://alphaplongee.com/</a>
Madinina Plongée services	Martinique	Specializing in diving and spearfishing equipment, they offer sales, rentals, and after-sales service for high-quality gear, as well as a workshop for equipment maintenance and repairs. <a href="https://www.madinina-plongee.com/accueil-boutique/">https://www.madinina-plongee.com/accueil-boutique/</a>
Club de Plongée Martinique	Martinique	They focus on teaching diving at all levels, emphasizing respect, availability, and safety, with the motto "Pleasure above all." <a href="https://martinique-plongee.com/">https://martinique-plongee.com/</a>
Oceana Plongée Martinique	Martinique	They offer a variety of underwater activities, including scuba diving, freediving, and snorkeling, tailored to different experience levels. <a href="https://oceana-plongee.com/">https://oceana-plongee.com/</a>
Apnee Madiniba an D'lo	Martinique	Specializing in freediving (amnea), they provide training and excursions to explore the underwater world of Martinique, offering training and excursions to explore the underwater world of Martinique while promoting relaxation, breath control, and marine awareness. <a href="https://www.facebook.com/Apnee.Madinina.Andlo/">https://www.facebook.com/Apnee.Madinina.Andlo/</a>
Les Heures Saines	Guadeloupe	Diving centre in Bouillante, known for dives in the Cousteau Reserve. <a href="https://www.heures-saines.gp/">https://www.heures-saines.gp/</a>
PPK Plongée	Guadeloupe	Offers diving and snorkelling trips in the Grand Cul-de-Sac Marin. <a href="https://www.ppkplongee.com/">https://www.ppkplongee.com/</a>
Blue Odyssey Diving	Guadeloupe	Diving centre in Saint-François offering courses and personalized trips. <a href="https://www.blueodysseydiving.com/">https://www.blueodysseydiving.com/</a>
Scuba Zen	Saint Barthélemy	Offers personalized dives and courses in crystal-clear waters. <a href="https://www.scubazen.fr/">https://www.scubazen.fr/</a>
Serial Divers	Saint Barthélemy	Diving centre offering explorations and training for all levels. <a href="https://www.serialdivers.com/">https://www.serialdivers.com/</a>
Bubble Shop	Saint Barthélemy	Specializes in recreational and technical diving with daily trips. <a href="https://www.bubbleshop.fr/">https://www.bubbleshop.fr/</a>
Sea Dolphin	Saint Martin	Offers PADI diving courses and trips in the Saint Martin Natural Reserve. <a href="https://www.seadolphindiving.com/">https://www.seadolphindiving.com/</a>
Scuba Fun	Saint Martin	Diving centre organizing dives in the best spots of the island.



Company Name	Island	Description
		<a href="https://www.scubafunsm.com/">https://www.scubafunsm.com/</a>
Octopus Diving	Saint Martin	Provides recreational and technical diving as well as courses for all levels. <a href="https://www.octopusdiving.com/">https://www.octopusdiving.com/</a>

Source: Own elaboration

### Pricing and services scheme

Diving centres in regions such as the Canary Islands, Azores, Madeira, and the French Caribbean islands offer a variety of services tailored to different skill levels and interests. These include diving courses, certifications, and excursions, all designed to showcase the rich underwater biodiversity and landscapes unique to these regions.

One of the most popular offerings is an **introductory activity** perfect for beginners. This one-day program allows participants to experience scuba diving under the direct supervision of professionals. Prices typically range between **€55 and €95**.

For those looking to advance their skills, diving centres provide **certification courses**. The Open Water Diver (**OWD**) course is the foundational certification that allows individuals to dive independently up to 18 meters. This course usually lasts three to four days and costs between **€325 and €499**. Advanced certifications, such as the Advanced Open Water Diver (**AOWD**), enable divers to explore greater depths and specialized activities. These courses typically take two to three days and cost around **€225 to €350**, with options like Brave Divers offering courses starting at €225. Additionally, **specialty courses**, such as Nitrox diving or underwater photography, offer focused training over one to two days, with prices ranging from **€160 to €350**.

**Diving excursions** are another major attraction, catering to certified divers seeking guided experiences. Single dives typically last one to two hours and cost **€30 to €50 per dive**. Dive packages offer multiple dives at discounted rates, ranging from €150 to €400 depending on the number of dives. **Night dives**, which provide a unique opportunity to observe nocturnal marine life, are also popular and cost between **€50 and €70 per dive**.

Beyond diving, many centres offer **snorkelling tours**, which are suitable for all ages and range in price from **€30 to €50 per person**. **Equipment rental** is another essential service, with full gear typically available for **€20 to €40 per day**. For those seeking exclusive experiences, **boat charters** are available, **starting at €300**, providing private access to prime dive sites.

Most diving centres emphasize safety and environmental responsibility. Participants are often required to provide medical clearance and meet minimum age requirements, which vary depending on the activity. Prices and availability may also fluctuate with seasonal demand. These centres not only create unforgettable underwater experiences but also contribute to the sustainable use of marine resources through eco-conscious practices and marine conservation efforts.

### 9.5.6.3 Astrotourism Aboard Ships

Astrotourism aboard ships is a niche but growing activity that combines the allure of the open sea with the wonder of stargazing. This activity takes advantage of the minimal light pollution found in offshore areas, providing an unparalleled view of the night sky. Passengers are invited to experience the celestial panorama, often guided by professional astronomers or knowledgeable enthusiasts who explain constellations, planets, and other astronomical phenomena.

This emerging form of tourism has gained popularity in many coastal regions where clear skies and favourable maritime conditions provide ideal settings for stargazing. These locations, known for their pristine natural environments and maritime heritage, have begun to integrate astrotourism experiences into their tourism offerings, appealing to both amateur astronomers and travellers seeking unique, sustainable experiences.

Figure 63. Stargazing at the Canary Islands



In the Canary Islands, astrotourism is particularly well-developed, with a longstanding tradition of land-based stargazing activities. Thus, stargazing sessions are popular on Palma, Tenerife, Fuerteventura and other islands. The region boasts a network of world-class astronomical observatories, including the Roque de los Muchachos Observatory in La Palma and the Teide Observatory in Tenerife. These facilities contribute to the islands' reputation as premier destinations for astronomical observation and education. This well-established infrastructure supports various astrotourism experiences, both on land and at sea, making the Canary Islands a leading destination for such activities.

Figure 64. Roque de los Muchachos astronomical observatory. La Palma (the Canary Islands)



The Canary Islands, internationally recognized for the exceptional quality of their skies for stargazing, have established themselves as a prime destination for astrotourism. This quality is protected by the Law on the Astronomical Quality of the Observatories of the Canary Islands Institute of Astrophysics (IAC) and is reflected in the designation of three Starlight Reserves, certifying the region's low levels of light pollution. Additionally, the Canary Islands government is actively promoting this form of tourism through initiatives that include guided tours of the IAC's international observatories in La Palma and Tenerife, allowing visitors to gain a deeper understanding of the universe in a unique setting. This strategy not only fosters tourism diversification but also promotes the preservation and appreciation of the Canary skies as a valuable natural resource.

Figure 65. Northern Lights in the Canary Islands



Some of the most notable stargazing spots in the Canary Islands include the following<sup>33</sup>:

- Sicasumbre Astronomical Viewpoint (Pájara, Fuerteventura)
- La Muralla Astronomical Viewpoint (Garafía, La Palma)
- Llano de las Ventas Astronomical Viewpoint (Puntagorda, La Palma)
- San Borondón Astronomical Viewpoint (Villa de Mazo, La Palma)
- Las Nieves Astronomical Viewpoint (San Sebastián de La Gomera, La Gomera)
- Guajara Astronomical Viewpoint (Teide National Park, Tenerife)
- Orchilla Astronomical Viewpoint (El Pinar, El Hierro)
- La Sabinilla Astronomical Viewpoint (La Aldea de San Nicolás, Gran Canaria)
- El Palmar Astronomical Viewpoint (Buenavista del Norte, Tenerife)
- Peñas del Chache Astronomical Viewpoint (Haría, Lanzarote)

Astrotourism appears to be a less developed activity in destinations like Madeira, the Azores, and the French Caribbean Islands. However, it holds significant potential as a growth and development vector for these regions, which share similar characteristics with the Canary Islands, such as clear skies, low light pollution, and stunning landscapes ideal for stargazing. These territories could leverage these advantages to diversify their tourism offerings and attract a specialized audience. A notable example is the local Observatory in Casa do Aeiro, Madeira, which organizes experiences featuring the use of astronomical equipment such as binoculars and telescopes, additional amenities, private transportation, parking fees, and entry to the observatory, offering visitors a full immersion into the magic of the night sky.

Some relevant places for stargazing in Madeira are:

- Fanal. UNESCO World Heritage Site, laurel forests at an altitude of 1000 m above sea level, situated in the northwest of Madeira.
- Pico do Arieiro. 1818 m above sea level, the third highest peak of the island.

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<sup>33</sup> A more comprehensive list of stargazing locations can be found on the official website: [Hello Canary Islands - Stargazing](https://www.hellocanaryislands.com/star-gazing/) (https://www.hellocanaryislands.com/star-gazing/)



- São Lourenço in the eastern part of Madeira.

Azores also offers this kind of activity being relevant the Santana Astronomical Observatory<sup>34</sup>, Science Center, part of the Azores' Region Science Center Network, which has science and educational outreach as its main goal, always focusing on the themes of astronomy and space exploration. Their activities are focused on the schools' science educational programs, providing adequate learning bases to all students.

Figure 66. Educational programs link to astrology at Santana Astronomical Observatory (Azores)



In Martinique, astrotourism is an emerging activity that allows you to enjoy the beauty of the starry sky of the Caribbean. Here are some interesting sites for stargazing:

- Mount Pelée: This volcano offers an unobstructed view and often clear skies, ideal for stargazing.
- Caravelle Peninsula: Located in the east of the island, this nature reserve is away from the city lights, offering spectacular night skies.
- Les Anses d'Arlet: Known for its beaches, this region also offers quiet spots to admire the night sky.
- Le Morne Rouge: Located near Mount Pelée, this village offers favorable conditions for astro-tourism.

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<sup>34</sup> Located in Pico de Bode, Santana, Rabo de Peixe, the Santana Astronomical Observatory - Azores (OASA) is a unique institution for the dissemination of scientific knowledge in Ribeira Grande, São Miguel island.. It is a Science Centre, integrated into the regional network of Science Centres, which are distributed across all the islands of the archipelago and are aimed at promoting scientific knowledge and access to technological innovations. From various scientific areas, Ribeira Grande was chosen to receive the only Astronomical Centre in the region, thanks to its extended views of the Northern Hemisphere sky.

The OASA has all the necessary resources to be a meeting point for amateur astronomers and to provide interactive and educational support to school programmes that address science-related topics. So, the OASA is a unique recreation and learning facility for all ages and the general public.

More information at <https://www.ribeiragrande.pt/en/geo/oasa-observatorio-astronomico-de-santana/>

These sites allow you to take full advantage of Martinique's starry nights.

Astrotourism on board is becoming a promising activity for passenger transport vessels operating between islands or connecting islands with mainland Europe. These routes, often traversing remote and dark oceanic areas, provide an excellent platform for stargazing activities during evening journeys. By offering onboard workshops, guided sessions, and access to professional-grade telescopes, passenger ferries and other transport vessels can enhance their service offerings, attract a broader range of travellers, and create added value for night crossings.

Typically offered as part of cruise packages, private charters, or passenger transport services, these experiences may include the use of telescopes, star maps, and multimedia presentations to enhance understanding and engagement. Depending on the region and season, participants may witness rare events such as meteor showers, eclipses, or even the aurora borealis. The combination of the serene ocean environment and the grandeur of the cosmos creates a profound and memorable experience for participants, contributing to the broader trend of sustainable and experiential tourism.

Figure 67. Astrotourism Aboard Ships







### Companies, prices and offer

Several companies in these regions offer astrotourism experiences. Some examples of those can be found in the following table.

Table 64. Astrotourism in the Area of Study. Examples of companies and services.

Islands	Companies
The Canary Islands	<p><b>AstroEduca S.L.:</b> Specializes in astronomical outreach and tourism in Gran Canaria, offering stargazing evenings and management of educational observatories.  <a href="https://www.astroeduca.com/astronomy-tours-stargazing-gran-canaria/">https://www.astroeduca.com/astronomy-tours-stargazing-gran-canaria/</a></p>
	<p><b>AstroLaPalma:</b> Based in La Palma, provides astronomical tours, visits to the Roque de los Muchachos Observatory, and night photography activities as well as rental of telescopes.  <a href="https://lapalmastars.com/">https://lapalmastars.com/</a></p>
	<p><b>ASTERARK®:</b> Located in Tenerife, offers star observation services, consultancy, events, and outreach, guided by certified professionals.  <a href="https://asterark.com/">https://asterark.com/</a></p>
	<p><b>Nauticstar:</b> It offers astronomical tours, visits to observatories and observation on board.  <a href="https://nauticstars.com/es/experiencias/navegar-con-las-stars/">https://nauticstars.com/es/experiencias/navegar-con-las-stars/</a></p>
	<p><b>Astronorte:</b> Based in La Palma, Astronorte provides guided tours of the night sky using professional telescopes, allowing participants to observe constellations, planets, galaxies, and nebulae.  <a href="https://www.astronorte.com">https://www.astronorte.com</a></p>
	<p><b>Teide Stars:</b> They offer packages similar to the previous ones with special focus on particular events  <a href="https://www.teidestars.com/products/teide-stars-tour">https://www.teidestars.com/products/teide-stars-tour</a></p>
	<p><b>Night Skies Tenerife</b>  <a href="https://www.nightskiestenerife.com/">https://www.nightskiestenerife.com/</a></p>
Madeira	<p><b>Viator</b> Offers tours and stargazing activities At the local Observatory in Casa do Aerio</p>

Islands	Companies
	<a href="https://www.viator.com/tours/Madeira/Stargazing-and-Astronomy-in-Madeira/d5392-410282P1">https://www.viator.com/tours/Madeira/Stargazing-and-Astronomy-in-Madeira/d5392-410282P1</a>
Azores	<b>Santana Astronomical Observatory (Azores).</b> Combines tours and visit to tourist with educational programs to local residents. <a href="https://www.ribeiragrande.pt/en/geo/oasa-observatorio-astronomico-de-santana/">https://www.ribeiragrande.pt/en/geo/oasa-observatorio-astronomico-de-santana/</a>
Martinique	<b>The skyline.</b> Offers an observing guide to plan the observation from Sainte-Luce, Martinique. It's divided into three sections, detailing visible objects for post-sunset, nighttime and pre-sunrise viewing. Only objects reaching at least 15° altitude and set/rise at least 15 minutes after/before the Sun are listed. <a href="https://theskylive.com/guide?geoid=3569928">https://theskylive.com/guide?geoid=3569928</a>
	<b>Tropical Sky:</b> In partnership with the <b>CDST</b> (Centre de Découverte des Sciences de la Terre), this association organizes stargazing evenings and special events such as the Night of the Stars. <a href="https://www.martinique.org/en/things-to-do/culture-heritage/centre-de-decouverte-des-sciences-de-la-terre">https://www.martinique.org/en/things-to-do/culture-heritage/centre-de-decouverte-des-sciences-de-la-terre</a>
	<b>Discover Halifax.</b> Offer a combination with stargazing, dinner in a guided tour by the Eastern Shore with a walk in Martinique Beach. <a href="https://discoverhalifaxns.com/itineraries/eastern-shore-stargazing-adventure/">https://discoverhalifaxns.com/itineraries/eastern-shore-stargazing-adventure/</a>
	<b>CDSA (Club de Découverte des Sciences Astronomiques):</b> This association organizes sky observation events and introductory astronomy meetings. They offer regular activities for astronomy enthusiasts <a href="http://www.cieltropical.com/">http://www.cieltropical.com/</a>

Source: Own elaboration

Typical prices for these activities vary by region and service level. Stargazing excursions typically range between €20 and €200 per person, depending on several factors, duration, other services included such as transportation, dinner, and the use of professional binoculars or telescopes.

As an example of astrotourism on board, In La Palma, the Canary Islands, the company Nautic Stars offers the "Sailing with the Stars" tour, combining 1.5 hours of sunset navigation with 1.5 hours of stargazing using professional telescopes at Puerto de Tazacorte.

To book stargazing activities, there are several options. Visitors can make direct reservations through the websites of the companies offering these experiences, ensuring access to specialized services tailored to individual preferences. Alternatively, many tour operators include

**This is a experience that combines navigation with stars & stargazing with telescopes**



**PART 1**

- 1.5 hours boat trip with FLIPPER at dusk from the port of Tazacorte.
- Observation of the Sun, description of the Solar System
- Celestial Navigation, Nautical Stars and Planets.
- Nautical instruments: sextant, astrolabe, GPS.
- Nautical twilight.
- Drinks on board.

**PART 2**

- 1.5 hours of observation with professional telescopes, right in the port of Tazacorte.
- Observation of the Moon, planets, stars and galaxies.
- Observation of constellations with LaserPointer.















stargazing in their packages, combining it with other activities for a more diverse itinerary. Additionally, local tourism offices and public entities actively promote astrotourism and provide links to trusted providers. These resources can be found on official tourism websites, such as [Hello Canary Islands](#), which offer detailed information and guidance for planning your experience under the pristine Canary skies.

Figure 68. Samples of pricing scheme in stargazing (Astrotourism)





The figure displays four examples of stargazing tour pricing and booking interfaces:

- Top Left:** "Stargazing and Astronomy in Madeira". Price: 2 Adults x \$42.90, Total \$85.80. Includes taxes and booking fees. Time: 8:00 PM. Button: "RESERVE NOW & PAY LATER ELIGIBLE".
- Top Right:** "STARGAZING TRANSPORT INCLUDED". Price: 2 Adults x \$67.56, Total \$135.12. Includes taxes and booking fees. Time: 6:00 PM. Button: "RESERVE NOW & PAY LATER ELIGIBLE". Note: "POPULAR" and "Popular option based on the number of bookings on the Tripadvisor site over the past 60 days".
- Bottom Left:** "Observación de estrellas y astronomía en Madeira". Price: Desde 40,00 € por persona. Includes a "Garantía del precio más bajo". Booking date: viernes, 3 de ene de 20... for 2 people. Time selection: "Seleccione una hora". Button: "Comprobar disponibilidad". Notes: "Cancelación gratuita hasta 24 horas antes del inicio de la experiencia (hora local)" and "Reserva ahora y paga después - Reserva plaza manteniendo la flexibilidad".
- Bottom Right:** "Teide Stars". Price: 34.90 € - 24.90 € (En oferta). "Plazas limitadas". Language options: Español, Inglés. Group size options: 24, 16, 8, Privado. Tour options: Básico, Completo.

 <p><b>Mejor elección</b></p> <p>TOUR GUARDO <b>Tenerife: Atardecer y observación de estrellas en el Parque Nacional del Teide</b> 3 - 4 horas • Grupo reducido • Recogido disponible <b>Se agota rápidamente</b> Se reservó 16 veces ayer ★★★★★ 4.6 (101) Desde 35,00 EUR por persona</p>	 <p><b>Excursión de un día más sencilla</b></p> <p>EXCURSIÓN DE UN DÍA <b>Tenerife: Puesta de Sol y Observación de las Estrellas en el Parque Nacional del Teide</b> 3 - 6 horas • Recogido disponible <b>Se agota rápidamente</b> Se reservó 25 veces ayer ★★★★★ 4.2 (101) Desde 40,00 EUR por persona</p>	 <p><b>Mejor valoración</b></p> <p>TOUR GUARDO <b>Parque Nacional del Teide: Excursión guiada para observar las estrellas con el Gran Telescopio</b> 3 horas • Grupo reducido <b>Se agota rápidamente</b> ★★★★★ 4.9 (101) Desde 49,00 EUR por persona</p>	 <p>EXCURSIÓN DE UN DÍA <b>Tenerife: Puesta de Sol y Observación de las Estrellas en el Parque Nacional del Teide</b> 3 - 4.5 horas • Recogido disponible <b>Se agota rápidamente</b> ★★★★★ 4.6 (162) Desde 55,00 EUR por persona</p>
 <p>EXCURSIÓN DE UN DÍA <b>Teide: Excursión guiada nocturna al atardecer y observación de las estrellas con cava</b> 5 horas • Recogido disponible ★★★★★ 4.6 (111) Desde 89,00 EUR por persona</p>	 <p>EXCURSIÓN DE UN DÍA <b>Tenerife: Tour nocturno al atardecer y observación de las estrellas en el Teide - Cava</b> 3 - 6 horas • Recogido disponible ★★★★★ 3.9 (141) Desde 34,00 EUR por persona</p>	 <p><b>Mejor valoración</b></p> <p>TOUR GUARDO <b>Parque Nacional del Teide: Experiencia de observación de estrellas</b> 30 minutos ★★★★★ 4.7 (201) Desde 35,00 EUR por persona</p>	 <p>Originals by GetYourGuide</p> <p>TOUR GUARDO <b>Tenerife: Visita guiada al observatorio del Teide</b> 1.5 horas ★★★★★ 4.6 (132) Desde 21,00 EUR por persona</p>
 <p>EXCURSIÓN DE UN DÍA <b>Tenerife: Excursión Astronómica Observatorio del Teide</b> 8 horas • Recogido disponible ★★★★★ 4.7 (161) Desde 103,00 EUR por persona</p>	 <p>AVENTURA <b>Senderismo Cumbre del Teide de noche para un amanecer y una sombra</b> 10 horas • Grupo reducido • Recogido disponible ★★★★★ 5 (42) Desde 199,00 EUR por persona</p>	 <p>EXCURSIÓN DE UN DÍA <b>Tenerife: Teide y Estrellas - Almuerzo Guachincho - Cava Vip Tour</b> 7 horas • Grupo reducido ★★★★★ 4.6 (171) Desde 95,00 EUR por persona</p>	 <p>TOUR GUARDO <b>Tenerife: Explora el Universo - Experiencia Telescopio Teide</b> 1.5 horas • Grupo reducido ★★★★★ 5 (6) Desde 40,00 EUR por persona</p>





 <p>EXCURSIÓN DE UN DÍA <b>Tenerife: Teide y Estrellas</b> 4,5 - 8 horas - Reservas disponibles</p> <p>★★★★☆ 4,3 (2)</p> <p>Desde 73,00 EUR por persona</p>	 <p>EXCURSIÓN DE UN DÍA <b>Tenerife: Puesta de Sol y Estrellas en el Teide con Teletérico</b> 8 horas - Reservas disponibles</p> <p>☑ Certificado por GetYourGuide</p> <p>★★★★☆ 4,2 (7)</p> <p>Desde 168,00 EUR por persona</p>	 <p>EXCURSIÓN DE UN DÍA <b>Tenerife Bajo las Estrellas</b> 9 horas - Sin cancel - Reservas disponibles</p> <p><b>Nueva actividad!</b></p> <p>Desde 78,00 EUR por persona</p>	 <p>TOUR GUIADO <b>Tenerife: Paseo para observar las estrellas en el Parque Nacional del Teide</b> 2 horas</p> <p>★★★★☆ 5 (2)</p> <p>Desde 27,00 EUR por persona</p>
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## 9.5.7 Sports activities linked to the sea

### 9.5.7.1 Overview

Sea-related nautical sports offer a wide variety of recreational and competitive activities that allow individuals to explore, enjoy, and challenge the marine environment. From riding waves in sports like surfing, windsurfing, or paddleboarding, to diving into the depths through scuba diving or snorkelling, these disciplines blend excitement, a connection with nature, and a unique bond with the ocean. Activities like sailing, kitesurfing, and wakeboarding harness the wind and currents to deliver dynamic, adrenaline-filled experiences. These sports not only promote physical and mental well-being but also encourage respect for marine ecosystems, making them a way to enjoy the sea while protecting its biodiversity.

This ecosystem of sea-related nautical sports not only fosters personal growth and environmental stewardship but also presents significant opportunities for complementary business development within the blue economy. From the creation of specialized equipment and training centres to the expansion of eco-tourism services and sustainable infrastructure, these activities drive innovation and investment in coastal regions. Additionally, they encourage partnerships between industries such as technology, conservation, and hospitality, enabling a synergistic approach to preserving marine environments while boosting local economies and creating jobs.

Sea-related nautical sports are designed to cater to both local residents and tourists, offering a wide range of opportunities to engage with the marine environment. These activities include free equipment rentals for independent exploration, short-duration courses tailored for visitors, and longer, more in-depth training programs for locals. They also encompass extracurricular activities aimed at fostering a love for the ocean among young residents, as well as the organization of events and competitions that range from amateur to professional levels. Additionally, certain events carry cultural or social significance, celebrating maritime traditions and strengthening community ties. This inclusive approach ensures that the benefits of nautical sports extend beyond recreation, enriching local communities and providing diverse opportunities for engagement with the sea.

### 9.5.7.2 Activities and Sports disciplines linked to the sea.

The world of sea-related nautical sports is as diverse as the ocean itself, offering a range of activities that connect individuals with the marine environment in unique and exhilarating ways. This comprehensive list categorizes these sports based on their interaction with water—whether on the surface, within the waves, or beneath the depths. Each discipline provides a distinctive experience, catering to different skill levels and interests, while promoting a deeper appreciation for the sea's vast beauty and challenges. Explore this vibrant array of activities and discover how they contribute to recreation, competition, and the preservation of marine ecosystems.

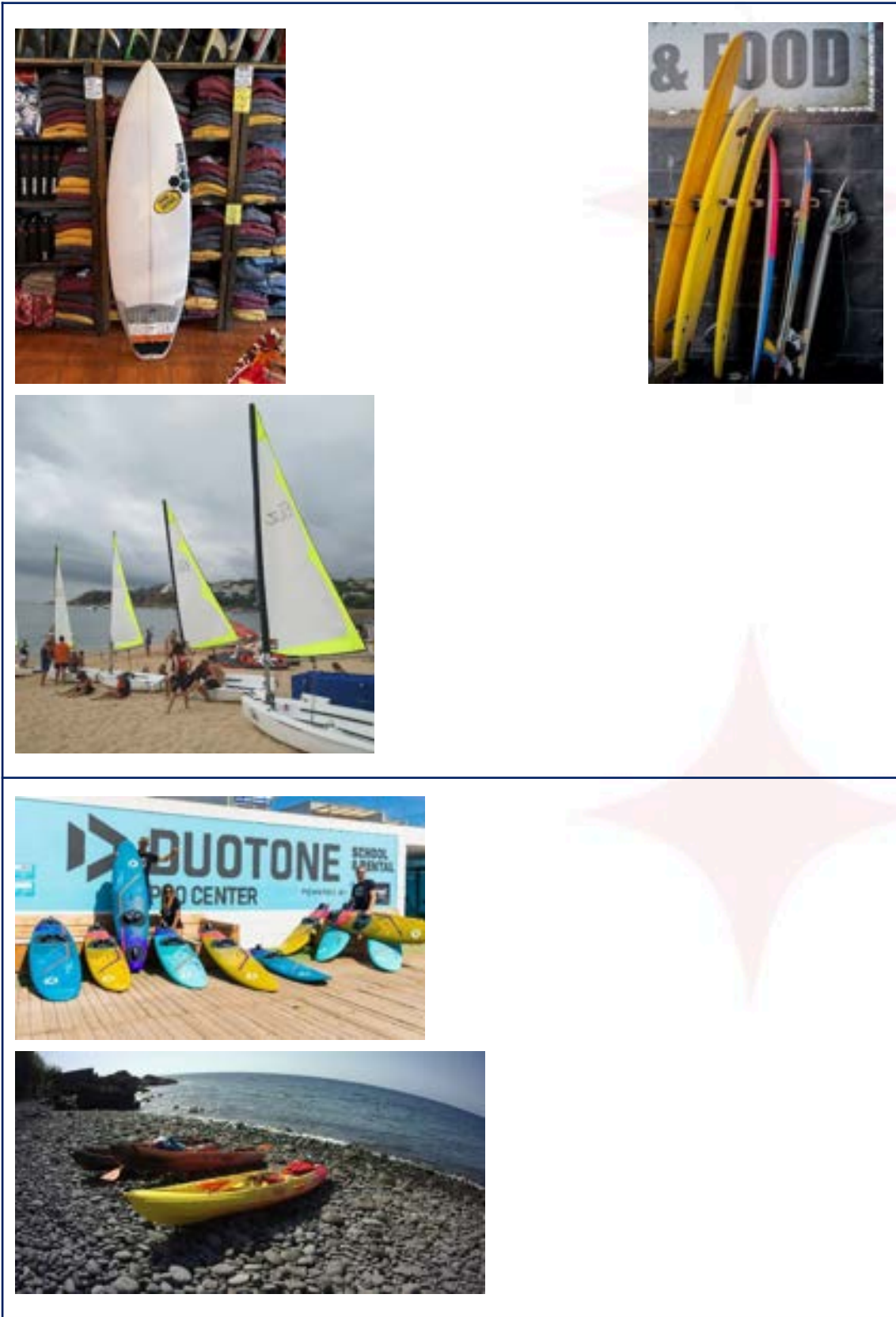


Table 65. Type of sea-related sports and activities

Type	Sport
On the water	<ul style="list-style-type: none"> <li>- <b>Surfing:</b> Riding waves on a board.</li> <li>- <b>Windsurfing:</b> Combining surfing and sailing using a board with a sail.</li> <li>- <b>Kitesurfing:</b> Riding on a board pulled by a kite.</li> <li>- <b>Paddle Surfing (Stand Up Paddle):</b> Standing on a board and paddling.</li> <li>- <b>Bodyboarding:</b> Riding waves lying on a smaller board.</li> <li>- <b>Skimboarding:</b> Gliding on a board over shallow water or the shore.</li> <li>- <b>Sea Kayaking:</b> Navigating in kayaks designed for open water.</li> <li>- <b>Rowing (Sea Rowing):</b> Propelling a boat using oars in open waters.</li> <li>- <b>Sailing:</b> Navigating boats powered by wind in their sails.</li> <li>- <b>Water Skiing:</b> Skiing on water while being pulled by a boat.</li> <li>- <b>Wakeboarding:</b> Riding a wide board while being pulled by a boat.</li> <li>- <b>Wakesurfing:</b> Surfing the wake created by a boat without being attached to a rope.</li> <li>- <b>Flyboarding:</b> Flying above the water using jet propulsion.</li> <li>- <b>Kneeboarding:</b> Kneeling on a board while being towed by a boat.</li> <li>- <b>Canoe Polo (Sea):</b> A team sport combining kayaking and ball-handling in coastal waters.</li> <li>- <b>Dragon Boat Racing (Coastal):</b> Team racing in large, dragon-shaped canoes in the sea.</li> <li>- <b>Fishing (Sport Fishing):</b> Recreational fishing in the sea.</li> <li>- <b>Light Sailing:</b> Navigating small sailing vessels such as dinghies.</li> <li>- <b>Yachting:</b> Recreational or competitive sailing on yachts.</li> <li>- <b>Wing Foiling:</b> Using an inflatable wing and a hydrofoil board to glide over the water.</li> </ul>
In the water	<ul style="list-style-type: none"> <li>- <b>Open Water Swimming:</b> Long-distance swimming in the sea.</li> <li>- <b>Synchronized Swimming:</b> Water choreography performed in teams, usually in pools but also adapted for open water.</li> </ul>
Under the water	<ul style="list-style-type: none"> <li>- <b>Scuba Diving:</b> Exploring underwater using breathing apparatus.</li> <li>- <b>Snorkelling:</b> Swimming on the surface while observing underwater with a mask and snorkel.</li> <li>- <b>Freediving (Apnea):</b> Diving deep without breathing equipment.</li> <li>- <b>Underwater Photography:</b> Capturing images of marine life or seascapes.</li> <li>- <b>Underwater Archaeology:</b> Exploring submerged archaeological sites.</li> <li>- <b>Spearfishing:</b> Hunting fish underwater with spears or harpoons.</li> </ul>

Source: Own elaboration

Figure 69. Landscape of activities and sports disciplines linked to the sea.











### **9.5.7.3 Business structure and pricing**

Similar to diving, from a business perspective, sea-related nautical sports require low initial investment, making it an attractive sector for small and medium-sized enterprises (SMEs) and even individual entrepreneurs. This accessibility fosters a highly dynamic and diverse market, where operators can easily establish themselves. These activities are often strategically distributed along the coastline, taking advantage of key locations such as marinas, popular beaches, or dedicated facilities equipped with ramps and pontoons for loading and unloading equipment. This geographical dispersion not only ensures accessibility for participants but also supports the development of local economies by bringing activity to a wide range of coastal areas.

The prices for each activity may vary depending on the season, demand, location, quality of the equipment and service provider.

In the Canary Islands, renting equipment and services for nautical sports is widely accessible, with prices varying depending on the activity. Surfboards or paddleboards can be rented typically for €15 to €25 per hour, while individual kayaks are typically available for €15-20 per hour and tandem kayaks for €20-30 per hour. Windsurfing and kitesurfing equipment are slightly more expensive, ranging from €30 to €60 per hour, depending on the quality of the gear.

In the Azores, prices are similar, with activities like scuba diving priced between €50 and €100 per dive, including equipment, while snorkelling is more affordable at €30 to €50. Kayak and paddleboard rentals are available for €15 to €25 per hour, providing an accessible way to enjoy the archipelago's stunning marine scenery.

In Madeira, nautical sports are also a highlight, with competitive pricing. Surfboards or paddleboards can be rented for €20 to €30 per hour, while kayaks are similarly priced at €15 to €25 per hour.

In Martinique, renting equipment for nautical sports is equally affordable, with surfboards or paddleboards costing €20 to €30 per hour. Kayaks can be rented for €15 to €25 per hour, while windsurfing and kitesurfing equipment ranges from €40 to €60 per hour.

The high degree of fragmentation in the market, coupled with the fact that many of these services do not require online advertising as they are often booked locally, makes it impossible to create comprehensive listings by type of activity. Many providers rely on word-of-mouth, partnerships with nearby accommodations, or on-site visibility at marinas, beaches, and other coastal hotspots to attract customers. This localized approach to marketing reflects the accessibility and spontaneous nature of these activities, but it also poses challenges for compiling centralized or exhaustive directories of service offerings.

### **9.5.7.4 The Economic Contribution of Sea-Related Nautical Sports**

Sea-related nautical sports play a significant role in boosting local economies, especially in coastal and island regions. These activities provide livelihoods to residents by creating opportunities in tourism, hospitality, and services that cater to both locals and visitors. For island communities in particular, these sports help diversify income streams, supporting sustainable development. Tourists and visitors are drawn to destinations offering exciting



marine experiences, which not only enhances the appeal of these locations but also supports complementary industries such as accommodation, dining, and transport. By integrating these sports into local tourism strategies, communities can offer a unique blend of adventure and cultural experiences, ensuring economic growth while preserving their maritime heritage.

The growing popularity of sea-related nautical sports has led to a thriving ecosystem of services and facilities. Many destinations offer courses and certifications in sports like scuba diving, kitesurfing, and sailing, appealing to enthusiasts of all levels. Local clubs and associations provide spaces for community engagement, training, and competitive events, fostering a sense of camaraderie and skill development. Competitions attract participants and spectators, driving tourism and generating income for the region.

For occasional participants or beginners, the availability of equipment rentals for activities such as paddleboarding, snorkelling, or kayaking makes these sports accessible without significant upfront investment. For enthusiasts, the purchase of gear like boards, wetsuits, or diving equipment provides ongoing support to local businesses. Moreover, the demand for training programs and certifications opens avenues for professional instructors, creating sustainable job opportunities.

By investing in the infrastructure for these sports—such as marinas, training centres, and retail outlets—destinations can position themselves as hubs for marine activities. This holistic approach not only benefits residents through employment and business growth but also enriches the experience for tourists, ensuring they return and recommend the destination to others.

## 9.5.8 Marine and Coastal Tourism

### 9.5.8.1 Market Overview, Evolution and Trends

The tourism market is a cornerstone of the global economy, encompassing a wide range of activities and industries that cater to the needs and desires of travellers. It includes everything from transportation, accommodation, and dining to entertainment, cultural experiences, and adventure activities. Over the past two decades, the sector has experienced remarkable growth, fuelled by increased disposable income, improved mobility, and technological advancements that have revolutionized how people plan and book their trips.

Globally, the tourism industry has seen significant expansion, with international arrivals growing from approximately 674 million in 2000 to nearly 1.5 billion by 2019, according to the World Tourism Organization (UNWTO). Although the sector faced unprecedented challenges due to the COVID-19 pandemic, it has demonstrated remarkable resilience. By 2023, international tourism had recovered strongly, with the UNWTO estimating that global arrivals had reached pre-pandemic levels, marking a robust rebound.

This consistent growth over the past two decades has made tourism one of the largest and fastest-growing economic sectors, contributing around 10% to global GDP and accounting for 1 in 10 jobs worldwide. The market's expansion is driven by evolving consumer preferences, the proliferation of low-cost airlines, and the increasing accessibility of digital platforms that simplify travel planning. These factors have not only increased the volume of travellers but also diversified the types of tourism experiences available, from cultural and eco-tourism to adventure and luxury travel, ensuring its continued growth and importance in the global economy.

The tourism sector has undergone significant transformations in recent years, adapting to travellers' changing preferences and technological innovations. Some of the most relevant changes are described below:

- **Specialization and personalization of tourism offers** have become essential as travellers increasingly demand tailor-made experiences that align with their specific interests. This trend has led companies to specialize in areas such as gastronomic tourism, wellness retreats, and adventure tourism, adapting to individual customer preferences.
- **Alternative accommodation options** have gained prominence, driven by platforms on internet, which offer more personalized and often more affordable alternatives to traditional hotels. This shift reflects a growing demand among travellers for unique and customizable lodging experiences that cater to diverse needs and budgets. Among the most popular modalities are vacation rentals, which allow guests to stay in fully equipped homes, apartments, or villas, providing a sense of comfort and familiarity, especially for families or groups. Boutique hotels, known for their intimate settings and curated designs, have also carved out a significant niche, attracting travellers seeking distinctive and luxurious stays. Another emerging trend is co-living spaces, which combine accommodation with community-focused activities, appealing particularly to

digital nomads and long-term travellers. Additionally, glamping (glamorous camping) has revolutionized outdoor accommodations by blending the adventure of camping with the amenities of luxury hotels, offering options like safari tents, yurts, and treehouses. Meanwhile, hostels continue to be a favourite among budget-conscious and younger travellers, often featuring communal areas that foster social interactions. Finally, eco-lodges and sustainable stays have grown in popularity, catering to environmentally conscious tourists by emphasizing renewable energy, low-impact construction, and integration with local ecosystems. Together, these diverse options highlight the evolution of the accommodation sector, driven by an increasing desire for personalization, sustainability, and memorable experiences.

- At the same time, the industry has witnessed **the emergence of new online sales modalities**, where operators provide options for booking accommodations and pre-arranged, remote reservations for excursions. This innovation has greatly simplified travel planning, offering travellers a seamless and convenient way to organize their trips from anywhere in the world. However, this shift has also **compelled tourism product providers to ensure a strong online presence**, driving the digital transformation of the sector. Hotels, vacation rental owners, tour operators, and other service providers now need to leverage digital platforms to remain competitive, adopting online booking systems, dynamic pricing tools, and social media marketing strategies to attract and retain customers.
- This transition has also given rise to **specialized online tour operators** that act as aggregators of experiences and intermediaries between travellers and local service providers. These operators offer a wide range of curated activities, such as cultural tours, adventure sports, wellness retreats, and culinary experiences, tailored to meet the diverse preferences of modern travellers. By consolidating various offerings into a single platform, these companies make it easier for tourists to explore and book activities at their destinations, often providing real-time availability, user reviews, and secure payment options. Additionally, these platforms help small and local service providers gain visibility and access to a global audience, creating opportunities for them to compete in a digital-first market. This digital ecosystem not only enhances the customer experience but also fosters innovation and collaboration across the tourism sector. As a result, the integration of online sales channels and specialized operators has become a fundamental aspect of modern tourism, reshaping the way travel experiences are marketed, purchased, and delivered.
- **Increased mobility and air accessibility** have further propelled the growth of tourism. The expansion of air routes and the rise of low-cost airlines have made previously less accessible destinations easier to reach, increasing travel frequency and allowing tourists to explore a broader range of locations.
- The **cruise industry** has experienced remarkable growth, establishing itself as one of the most rapidly expanding segments within the tourism sector. In 2023, global cruise passenger numbers reached 31.7 million, surpassing 2019 figures by 7%. This upward

trajectory is expected to continue, with projections indicating that passenger numbers could approach 40 million by 2027. This surge is attributed to the allure of all-inclusive travel and the unique opportunity to explore multiple destinations in a single journey, appealing particularly to multi-generational travellers and luxury seekers. To cater to diverse traveller preferences, cruise lines have diversified their offerings, developing specialized cruise experiences. Family-oriented cruises provide amenities such as kids' clubs, water parks, and character meet-and-greets, ensuring an engaging experience for younger passengers. Adventure cruises offer activities like kayaking, hiking, and wildlife exploration, appealing to those seeking immersive experiences in nature. Music-themed cruises feature live performances and interactive sessions with artists, covering genres from country to rock, creating a vibrant atmosphere for music enthusiasts. Additionally, luxury cruises focus on providing high-end services, gourmet dining, and exclusive shore excursions, catering to travellers seeking an opulent experience. This specialization within the cruise industry not only enhances the appeal to a broader audience but also contributes significantly to economic growth. For instance, in Spain, the cruise sector's revenue increased by 14% in 2023, reaching €6.45 billion.

- **The duration of stays** has evolved, with travellers increasingly seeking more intense experiences within shorter periods. This shift has led to a rise in weekend getaways and short trips, facilitated by the availability of low-cost flights and greater workplace flexibility.
- **The inclusion of young people in the tourism sector** has also been transformative. New generations are playing a crucial role in innovating the sector, driving digitalization, and creating more personalized and sustainable experiences. Their familiarity with technology and social media has significantly changed how tourism services are promoted and consumed. Simultaneously, diversification in complementary activities has become a hallmark of modern tourism. Travellers now seek experiences that go beyond merely visiting a destination, embracing activities such as excursions, adventure sports, and cultural engagements.
- Finally, **sustainability and responsible tourism** have gained significant traction. Travellers are increasingly aware of the environmental and social impact of tourism and are seeking sustainable options that respect both the environment and local communities. This growing demand has pushed companies to adopt eco-friendly and socially responsible practices, ensuring long-term benefits for destinations and their residents.

In summary, the tourism market is continuously evolving, driven by the demands of modern travellers, advancements in technology, and global challenges. The industry's focus on innovation, sustainability, and personalization ensures its resilience and relevance in the years to come.

**Coastal and marine tourism** has emerged as one of the most dynamic and fast-growing sectors within the global tourism industry, driven by the increasing demand for experiences that connect travellers with nature. This form of tourism capitalizes on the allure of seaside destinations,

offering visitors the opportunity to engage in a wide range of activities that include relaxation on pristine beaches, exploration of marine ecosystems, and participation in water-based sports and adventure activities. From snorkelling and diving to sailing, kayaking, and surfing, the diversity of experiences tied to the sea makes coastal tourism particularly appealing to adventure seekers and eco-conscious travellers alike. Additionally, coastal areas often host a variety of accommodation options, ranging from luxury beachfront resorts and boutique hotels to vacation rentals and eco-lodges, catering to a broad spectrum of preferences and budgets. These regions are not only favoured for their natural beauty and recreational offerings but also for their accessibility, as they are often equipped with robust infrastructure and proximity to urban centres, enhancing their appeal to both domestic and international tourists. This combination of natural charm, recreational diversity, and accommodation variety positions coastal and marine tourism as a cornerstone of the modern tourism economy.

Following this overview, a specific analysis will now be conducted focusing on **coastal marine tourism**, tailored to the Region. This analysis will examine the supply and demand characteristics of it, highlighting its distinctive features and their implications for the local tourism market.

#### **9.5.8.2 Demand Analysis (Tourist Arrivals and Overnight Stays).**

##### **The Canary Island**

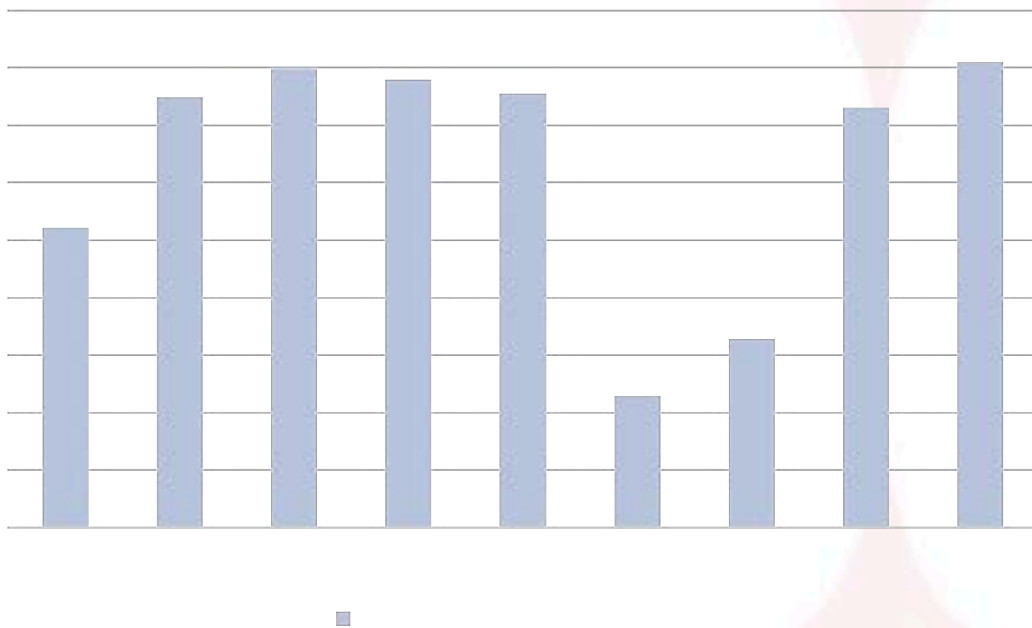
The following sources provide detailed data on the evolution of tourism in the Canary Islands:

- **Instituto Canario de Estadística (ISTAC):** This organization offers comprehensive and official statistics on tourism in the Canary Islands, including data on guest numbers, overnight stays, and occupancy rates across several types of accommodations. The platform also provides historical trends and comparative analyses. ([www.gobiernodecanarias.org/istac](http://www.gobiernodecanarias.org/istac)).
- **Instituto Nacional de Estadística (INE):** The Spanish National Statistics Institute offers broader data that includes detailed statistics on tourism in the Canary Islands as part of national reports, covering aspects such as accommodation, arrivals, and expenditures. ([www.ine.es](http://www.ine.es)).
- **Turismo de Canarias:** This entity focuses on promoting the Canary Islands as a tourist destination and provides market reports, tourism trends, and performance indicators. Their analyses include visitor profiles, economic impacts, and segmentation by nationality and type of trip. ([www.turismodeislascanarias.com](http://www.turismodeislascanarias.com)).

According to data from the Canary Islands Tourism Observatory, the **number of tourists** visiting the Canary Islands in 2023 was **16.2 million**, of which more than 9.5 million visited the islands of the Las Palmas province, and 6.7 million visited Tenerife.

The evolution of tourist arrivals in the Canary Islands from 2010 to 2023, based on data from the Canary Islands Statistics Institute (ISTAC)<sup>35</sup>. It highlights a steady growth in tourist numbers from 10.43 million in 2010 to a peak of 15.98 million in 2017, followed by a slight decline in 2018 and 2019 with 15.59 and 15.11 million tourists, respectively. The impact of the COVID-19 pandemic is evident in the sharp drop to 4.6 million tourists in 2020 and 6.6 million in 2021. However, the data shows a strong recovery starting in 2022 with 14.62 million visitors, culminating in a record high of 16.21 million tourists in 2023. This trend underscores the resilience and recovery of the Canary Islands' tourism industry.

Figure 70. Tourist (millions) – The Canary Islands



Source: The Canary Islands Statistics Institute (ISTAC)

In accordance with the report of Turismo de Gran Canaria<sup>36</sup> these are the key features of the tourism in the Canary Islands:

- **Tourist distribution among islands:** A total of 16,210,911 tourists visited the archipelago, reflecting a 7.25% increase compared to 2019. Tenerife received the most visitors with 6,572,823, marking an 11.60% growth. Gran Canaria followed with 4,340,676 tourists, showing a modest increase of 1.59%. Lanzarote recorded 3,179,036 visitors, a 3.70% rise,

<sup>35</sup> Available at the date of report on [https://www.gobiernodecanarias.org/istac/estadisticas/sintesis/operacion\\_C00075B.html](https://www.gobiernodecanarias.org/istac/estadisticas/sintesis/operacion_C00075B.html)

<sup>36</sup> Turismo de Gran Canaria. ICT Cierre 2023. Available at the date of report on [https://www.grancanaria.com/turismo/fileadmin/PDF/informes/ICT\\_cierre\\_2023.pdf](https://www.grancanaria.com/turismo/fileadmin/PDF/informes/ICT_cierre_2023.pdf)



while Fuerteventura experienced the highest growth rate of 17.66%, welcoming 2,380,581 tourists.

- **Split foreigners / nationals:** In 2023, the distribution of tourists in the Canary Islands shows a clear predominance of foreign visitors across all islands. On Tenerife, 86.3% of tourists were foreigners, while 13.7% were nationals. Gran Canaria recorded a similar pattern, with 87.8% of visitors being foreign and 12.2% national. Lanzarote saw 89.7% foreign tourists and 10.3% national, while Fuerteventura exhibited the highest proportion of foreign visitors at 92.6%, with only 7.4% being domestic tourists.
- **Origin of visitor:** The largest share of visitors comes from the United Kingdom, accounting for 24.86% of the total, followed by tourists from the Nordic countries at 21.96% and Germany at 21.51%. The Netherlands ranks fourth with 7.17%, followed by France with 4.16%, and Italy with 3.33%.
- **Length of Stay:** The majority of visitors stayed for 1 to 7 nights, representing 62.85% of the total, confirming the island's popularity as a destination for short-term vacations. A significant portion, 29.62%, stayed for 8 to 15 nights, indicating a substantial share of medium-length stays. Longer stays of 16 to 31 nights accounted for 5.59%, while only 1.95% of tourists stayed for more than 31 nights. This distribution reflects Gran Canaria's appeal for both short getaways and medium-length vacations, with fewer visitors opting for extended stays.
- **Travel Purpose:** Vacation was the dominant reason for visiting Gran Canaria in 2023, accounting for 95.75% of all tourists, an increase from 92.10% in 2019, reflecting the island's growing appeal as a leisure destination. In contrast, business-related travel represented just 2.34% in 2023, a decline from 5.10% in 2019, likely due to the reduction in professional trips following the COVID-19 pandemic and the widespread adoption of virtual meetings. Other travel purposes, such as visiting friends and family or attending events, made up 1.91%, showing slight stability but remaining secondary to vacation-focused travel.
- **Accommodation Preference:** In 2023, hotels and similar accommodations remained the most popular choice, accounting for 64.38% of tourists, though this represents a decrease from 74.50% in 2019. Apartments gained significant popularity, increasing from 6.45% in 2019 to 18.75% in 2023. Staying with friends and family represented 6.87% of accommodations in 2023, a slight rise from 6.25% in 2019. Cruises accounted for 4.77%, down from 5.65% in 2019, while private homes were used by 2.36% of visitors, showing a small decline from 2.64%. Lastly, the other accommodations category decreased from 4.52% in 2019 to 2.87% in 2023.
- **Package Usage:** The use of travel packages decreased compared to 2019, with 53.64% of tourists opting for a package in 2023.

Figure 71. Origin of visitor to the Canary Island



Figure 72. Length of the Stay in the Canary Islands



Figure 73- Travel Purpose in the Canary Islands

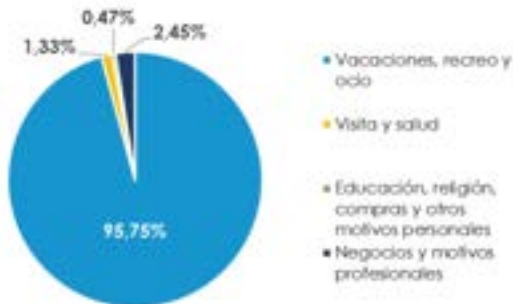


Figure 74- Accommodation Preference in the Canary Islands



Source: Turismo Gran Canaria. ICT Cierre 2023

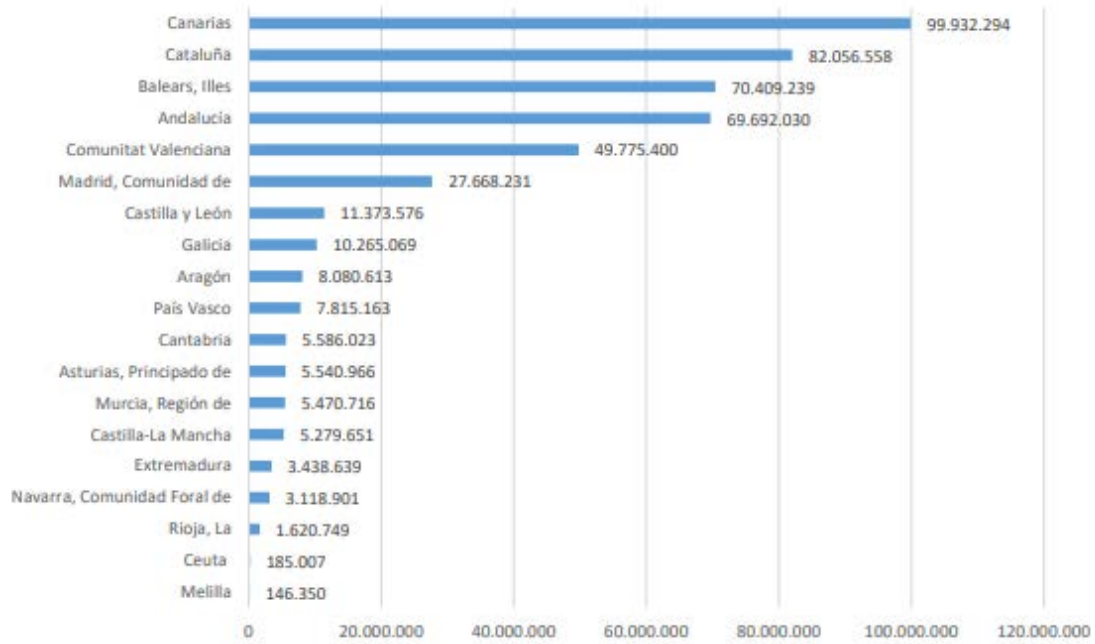
The Diagnostic Report of the National Strategy for Addressing the Demographic Challenge – Floating Population Effects Axis, edited by the Ministry of Territorial Policy and Public Function of the Government of Spain, provides a comprehensive demographic analysis of the Canary Islands in relation to the floating population, examining population trends, seasonality, and the concentration of tourism activity.

This data is essential for better understanding demographic dynamics and their impact on the region's territorial, economic, and social development. In fact, as will be detailed below, this population reaches a significant magnitude, and the demand for goods and services generated by the tourist population must be added to that of the resident population.

In relative terms, the Canary Islands have a high rate of non-resident population linkage, ranking among the Spanish Autonomous Communities with the highest proportion of associated population. Estimating this is necessary to understand the real size of the internal market in terms of total population.

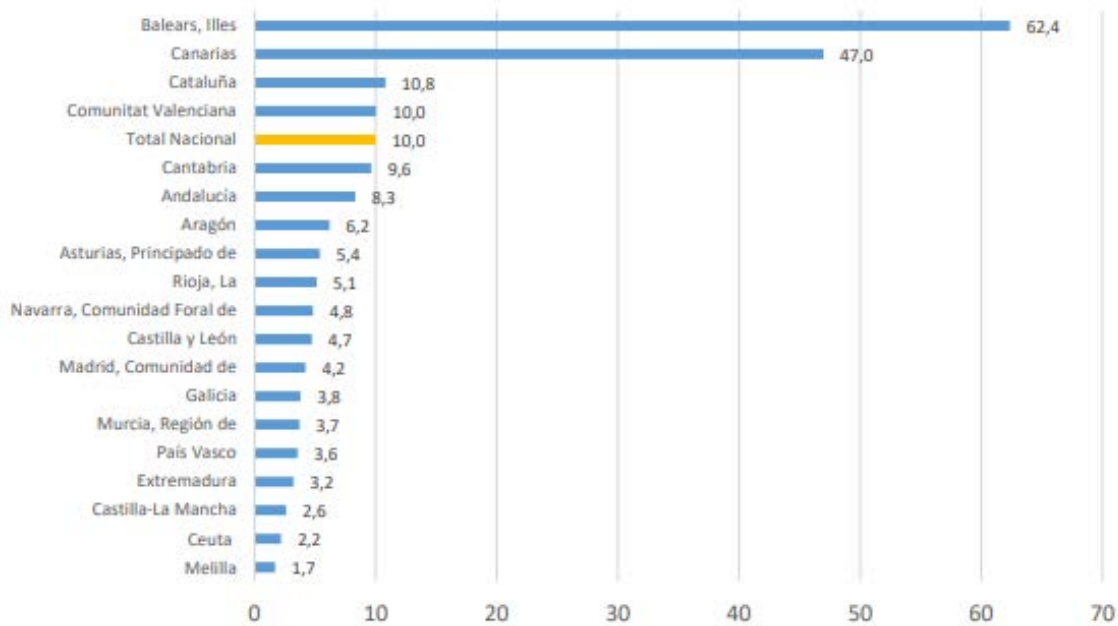
Additionally, data on overnight stays in regulated accommodations in Spain, provided by the Tourist Occupancy Survey by Autonomous Communities, highlights that the Canary Islands is the region with the highest total intensity, with a total of 99,932,294 overnight stays (Figure 72) and a density of 47 overnight stays per inhabitant, second only to the Balearic Islands in this parameter (47 overnight stays per inhabitant, Figure 73).

Figure 75. Overnight stays by Autonomous Community (Spain).



Source: Diagnosis of the National Strategy for the Demographic Challenge – Floating Population Axis. Ministry of Territorial Policy and Public Service

Figure 76. Overnight stays per inhabitant (Spain).

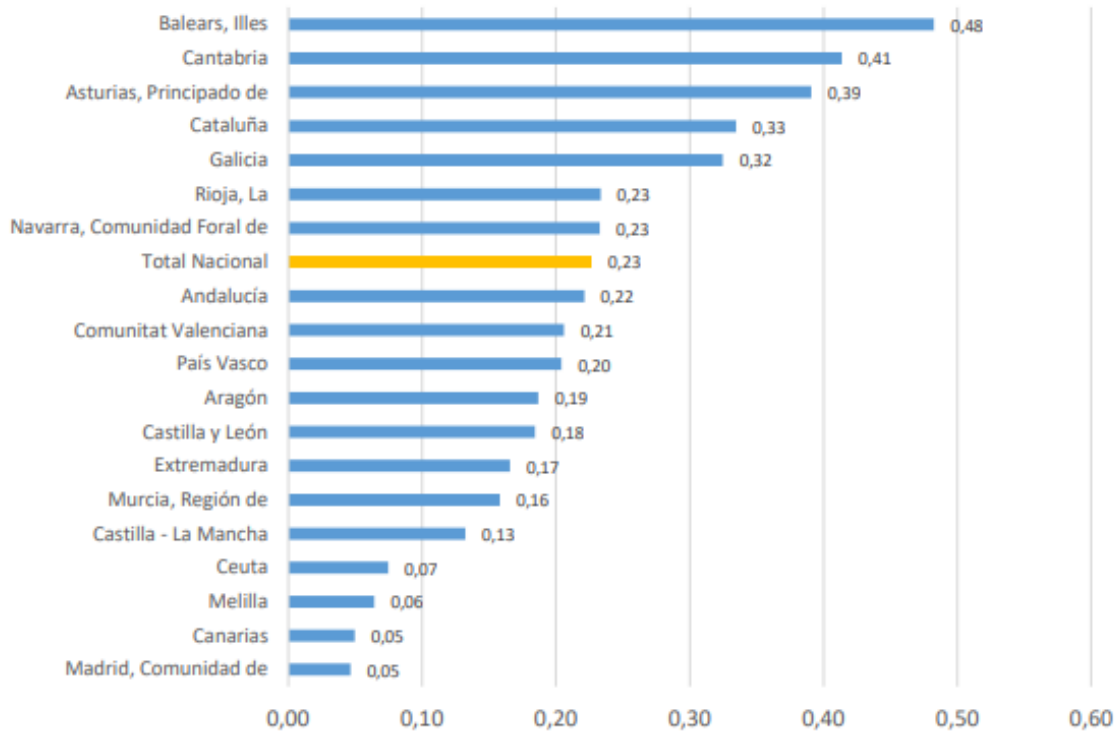


Source: Diagnosis of the Source: Prepared by the authors with data from the Canary Islands Tourism Observatory – Floating Population Axis. Ministry of Territorial Policy and Public Service

Combining the total number of overnight stays (99.9 million) and tourists (16.2 million), it can be estimated that the average stay per tourist in the archipelago is 6.2 days/tourist.

The Gini concentration index<sup>37</sup> for overnight stays in the Canary Islands is 0.05, indicating a very low spatial concentration of tourist activity (Figure 74).

Figure 77. Concentration index of overnight stays by Autonomous Community.

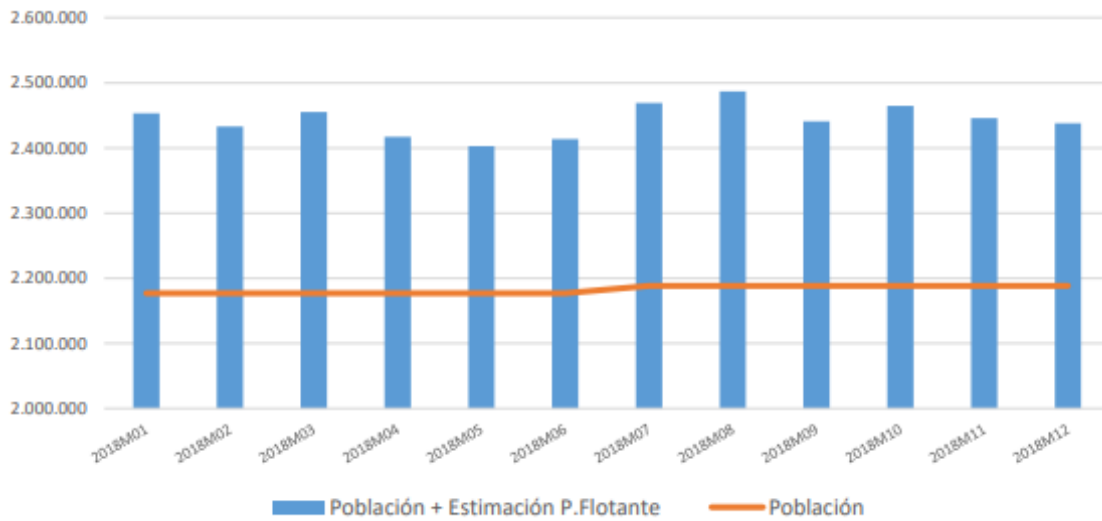


Fuente: *Diagnóstico de la Estrategia Nacional frente al reto demográfico – Eje Población Flotante. Ministerio de Política Territorial y Función Pública*

In fact, according to data from the National Strategy report against the demographic challenge, in the Canary Islands and unlike other tourist regions, the influx of tourists is high throughout the year, with an average population variation of 12%, reaching a peak of 13.6% in August, raising the population from around 2.2 million to rates that are between 2.4 and 2.5 million total. which represents an increase in the range of 200,000-300,000 inhabitants for the archipelago as a whole (Figure 75).

<sup>37</sup> The Gini index is an economic measure that is used to calculate the inequality of a variable (in this case overnight stays) that exists between districts and territories. The value of the Gini Index is 0 and 1, with either being the maximum equality (all territories have the same overnight stays) and 1 being the maximum inequality (all overnight stays occur in a single territory)

Figure 78. Seasonal population. Increase due to the effect of tourism in the Canary Islands



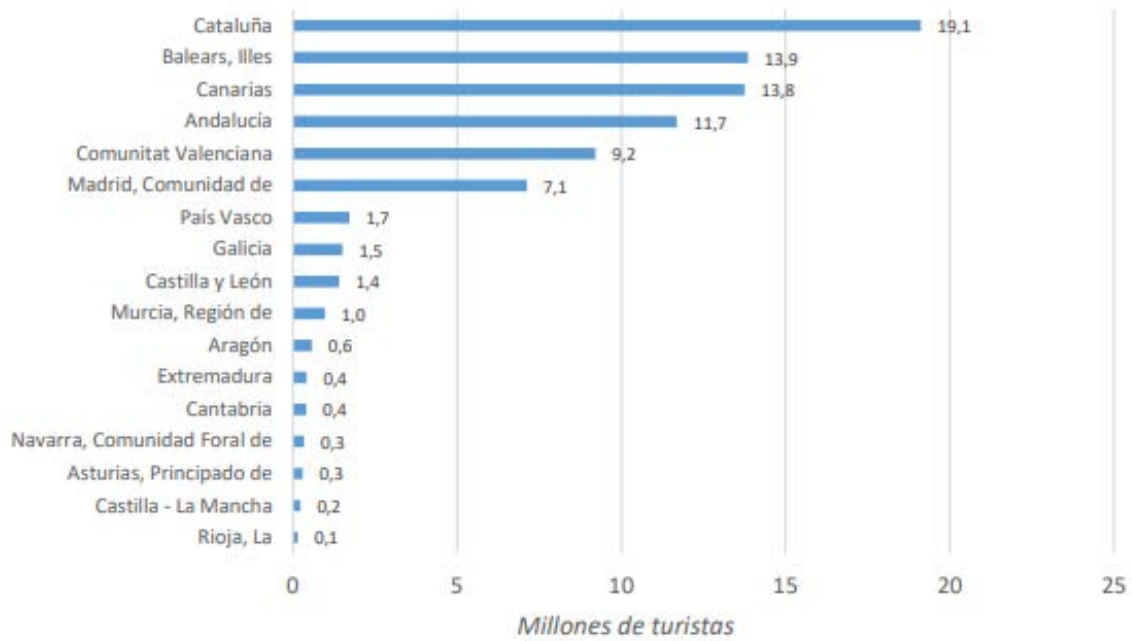
Source: *Diagnosis of the National Strategy for the Demographic Challenge – Floating Population Axis*. Ministry of Territorial Policy and Public Service

**For the purposes of this report, this seasonal stability in relation to the number of visitors with respect to other tourist regions is a strength for all those companies operating in the marine and coastal tourism market that find a flow of potential customers with fewer peaks and, with this, the amortization of investments and the hiring of personnel is facilitated.**

Using data based on border movements statistics, the Diagnosis of the National Strategy for the Demographic Challenge concluded that the number of international tourists reached 13.8 million in the Canary Islands, at the same level as the Balearic Islands and only surpassed by Catalonia (Figure 76), which represents 16.6% of the total in Spain (Figure 77) with an average of 6.5 international tourists per inhabitant, well above the national average and in second place nationally (Figure 78). Although these data should be disregarded as more recent data are available in the Canary Islands Tourism Observatory, they are reflected to give an idea of the significance of tourism in the archipelago in relation to the entire national territory.

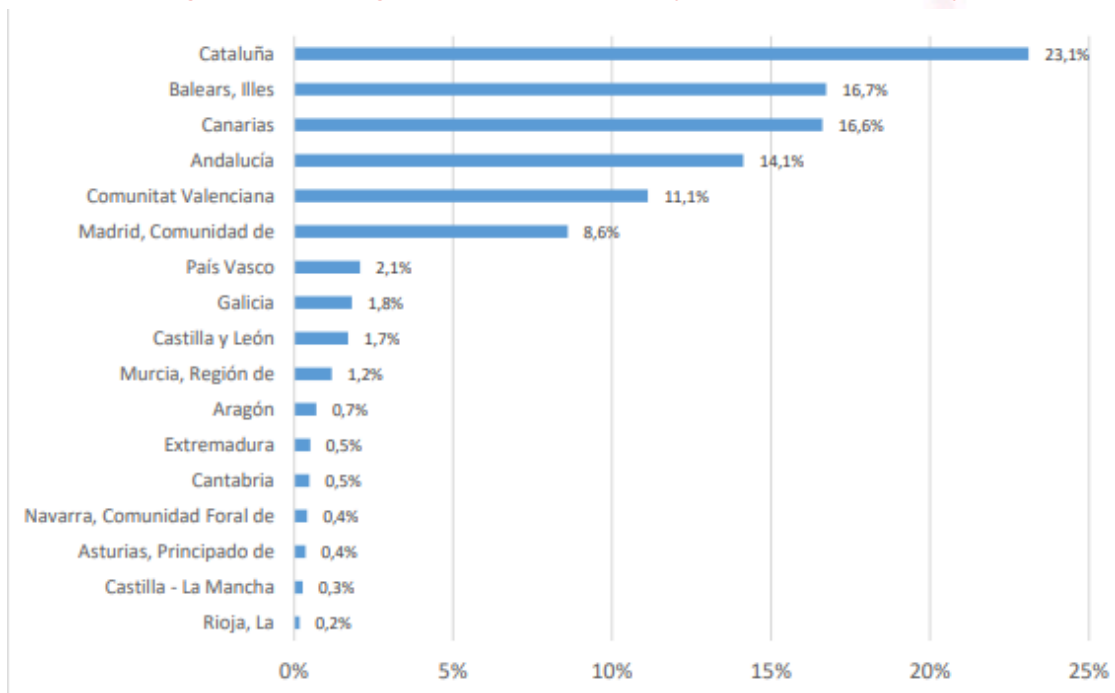
When the tourist population is included, these data raise the real population density to 463.8 people per km<sup>2</sup> (compared to 284.0 people per km<sup>2</sup> without including it), which highlights the high demographic pressure exerted by tourism and places it in third position in the entire national territory, only surpassed by Madrid and the Balearic Islands (Figure 79).

Figure 79. Number of international tourists by Autonomous Community



Source: *Diagnosis of the National Strategy for the Demographic Challenge – Floating Population Axis*. Ministry of Territorial Policy and Public Service

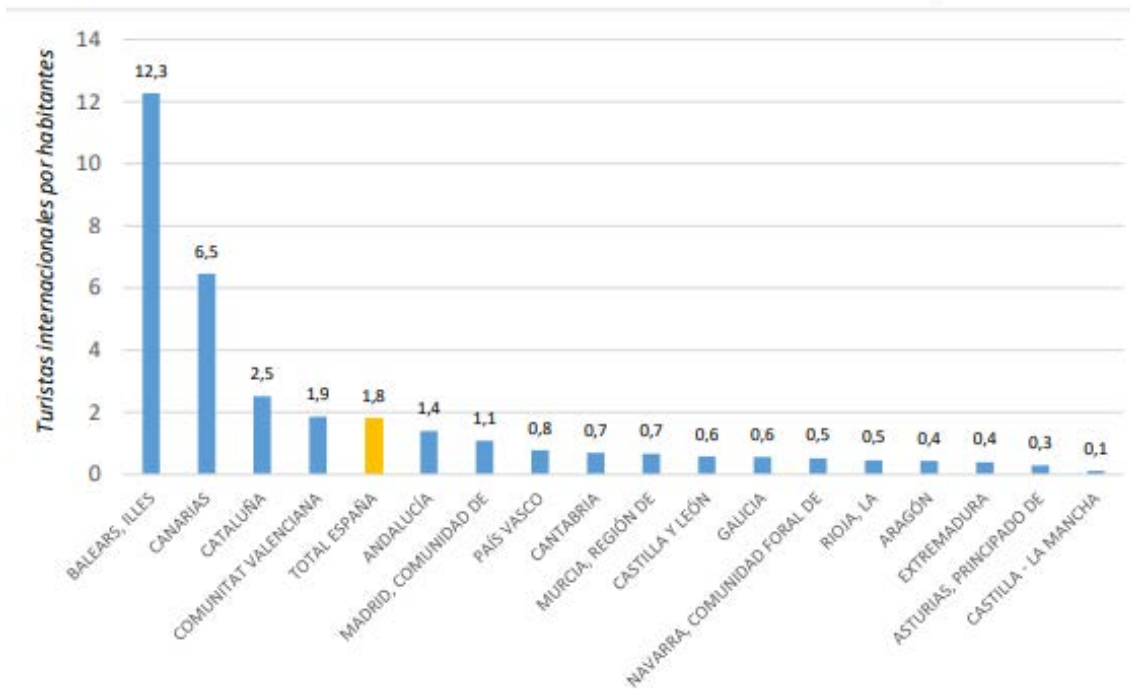
Figure 80. Percentage of international tourists by Autonomous Community



Source: *Diagnosis of the National Strategy for the Demographic Challenge – Floating Population Axis*. Ministry of Territorial Policy and Public Service

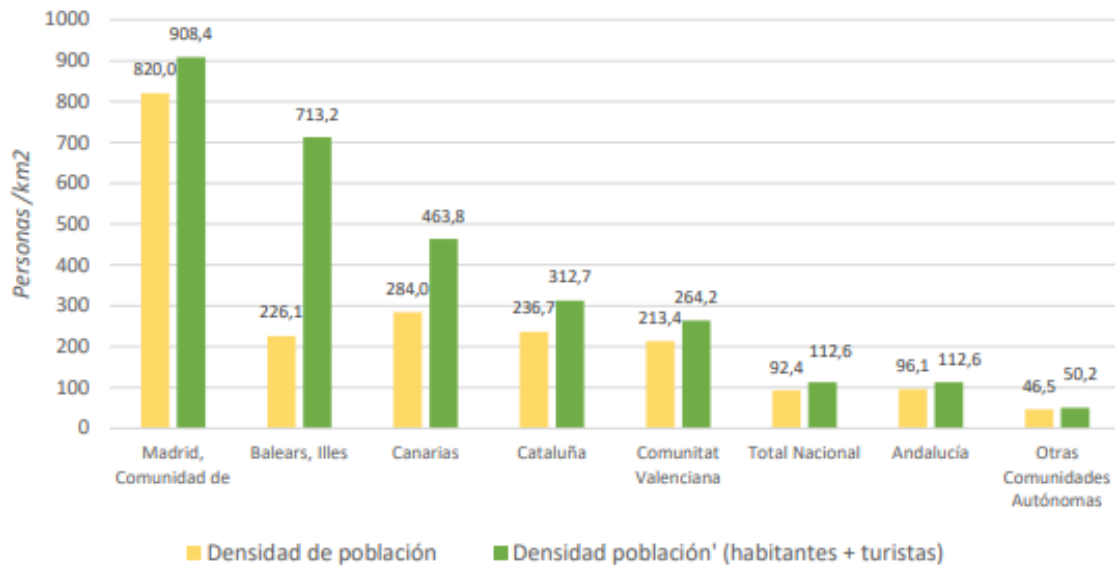


Figure 81. International tourists per capita.



Source: Diagnosis of the National Strategy for the Demographic Challenge – Floating Population Axis. Ministry of Territorial Policy and Public Service

Figure 82. Population density considering tourism.



Source: Diagnosis of the National Strategy for the Demographic Challenge – Floating Population Axis. Ministry of Territorial Policy and Public Service

## Madeira

The following sources provide detailed data on the evolution of tourism in Madeira:

- **Direção Regional de Estatística da Madeira (DREM):** This entity provides official statistics on tourism in Madeira, including updated time series covering the period from 1976 to 2023. The most recent reports, such as the one from July 2024, offer detailed analyses on tourist arrivals, overnight stays, and other key indicators.
- **Secretariat of Tourism of Madeira:** This office publishes periodic reports with tourism statistics, including data on the number of guests and overnight stays by municipality.

Between 2010 and 2019, Madeira experienced a steady increase in international tourist arrivals, peaking at approximately 1.3 million visitors in 2019. However, the COVID-19 pandemic caused a significant decline in 2020, with international arrivals dropping to around 325,000, roughly a quarter of the previous year's figures. The tourism sector began to recover in 2021 and in 2023, the hotel establishments recorded **1.5 million guest entries** and **approximately 8.1 million overnight stays**, growing by 8.5% compared to 2022<sup>38</sup>.

In accordance with the report “Statistics of Tourism 2023” from the Regional Secretariat of Tourism of Madeira<sup>39</sup>, the total number of guests across the entire island of Madeira was **2,344,155**. The municipality of Funchal accounted for the largest share, welcoming 1,431,101 guests, which represents 61.05% of the island's total. Santa Cruz followed with 267,770 guests (11.42%), and Calheta ranked third with 159,665 guests (6.81%). The municipalities of Machico and Porto Santo recorded 71,403 guests (3.05%) and 60,899 guests (2.60%), respectively. These figures underline the dominance of Funchal as the main tourism hub in Madeira, while Santa Cruz and Calheta also play important roles as secondary destinations (Table 66).

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<sup>38</sup> The Regional Directorate of Statistics of Madeira (DREM). Available at the date on the report on <https://estatistica.madeira.gov.pt/en/download-now-3/economic/turismo-gb/turismo-noticias-gb/tourism-press-release-current-gb/4639-08-07-2024-drem-releases-the-final-results-of-tourism-statistics-for-the-year-2023-and-updates-the-time-series-1976-2023.html#:~:text=%2D%20In%202023%2C%20the%20hotel%20establishments,overnight%20stays%20in%20tourist%20accommodation>.

<sup>39</sup> Regional Secretariat of Tourism of Madeira. Statistics of Tourism 2023. Available at the date of the report on [https://www.madeira.gov.pt/Portals/55/Documentos/EstatisticasTurismo/EST240314ResumoMensal\\_DEZ23.pdf?ver=4t1nLkKnVuQDEXodoE3dw%3D%3D](https://www.madeira.gov.pt/Portals/55/Documentos/EstatisticasTurismo/EST240314ResumoMensal_DEZ23.pdf?ver=4t1nLkKnVuQDEXodoE3dw%3D%3D)

Table 66. Guests, bed nights, occupancy rate by municipality in Madeira.

**Hóspedes, Dormidas, Taxa de Ocupação e RevPAR, por Município**  
Guests, bednights, occupancy rate and RevPAR by municipality

2023

Municípios	Hóspedes				Dormidas				Taxa de Ocupação-Cama (%)				RevPAR (€)			
	Mês	Acum. 2023	Var. 2023 mês (%)	Var. 2023 acum. (%)	Mês	Acum. 2023	Var. 2023 mês (%)	Var. 2023 acum. (%)	Mês	Acum. 2023	Var. 2023 mês (p.p.)	Var. 2023 acum. (p.p.)	Mês	Acum. 2023	Var. 2023 mês (%)	Var. 2023 acum. (%)
Calheta	9.030	159.665	8,8	24,4	44.721	765.485	3,8	21,4	30,7	58,4	-5,3	-4,0	50,30 €	74,05 €	6,6	25,3
Câmara de Lobos	2.990	55.718	-6,6	24,8	12.782	252.787	-1,2	21,3	31,4	56,0	-1,9	-6,2	33,42 €	54,15 €	9,3	30,9
Funchal	94.271	1.416.401	-0,3	13,8	455.062	6.929.793	-0,3	10,5	53,8	68,6	-2,3	-5,8	67,39 €	81,22 €	8,1	22,0
Machico	4.908	73.431	17,2	31,4	17.394	245.956	19,5	28,2	51,6	62,3	6,4	7,2	33,94 €	41,90 €	14,3	30,4
Ponta da Sol	3.009	43.057	16,0	28,1	14.353	204.878	13,5	25,8	54,5	64,6	-2,8	-13,4	56,93 €	74,85 €	2,0	16,5
Porto Moniz	3.948	50.542	30,5	18,7	10.359	132.273	28,1	22,8	55,8	64,8	6,8	-2,8	53,89 €	58,65 €	36,8	22,9
Ribeira Brava	2.344	37.142	29,2	50,7	10.292	151.725	33,5	53,4	30,3	45,5	-4,6	-5,2	20,27 €	32,50 €	0,3	34,4
Santa Cruz	16.818	240.196	3,4	16,9	81.036	1.197.875	6,0	14,0	49,7	69,0	1,3	0,9	48,17 €	64,83 €	10,3	27,8
Santana	3.914	63.194	16,0	32,1	10.874	189.809	8,7	30,9	39,0	58,2	0,0	2,1	30,50 €	45,11 €	2,5	22,2
São Vicente	4.103	68.296	30,4	26,5	17.109	274.512	27,5	29,8	41,8	58,3	2,8	-1,9	25,17 €	38,88 €	17,0	13,2
Porto Santo	8.014	127.803	39,7	12,4	17.184	563.447	49,7	8,7	31,7	49,4	19,4	-10,0	17,64 €	58,10 €	19,8	2,3
<b>Total RAM</b>	<b>149.807</b>	<b>2.344.165</b>	<b>-4,8</b>	<b>17,1</b>	<b>691.162</b>	<b>10.927.935</b>	<b>3,8</b>	<b>13,6</b>	<b>49,8</b>	<b>68,2</b>	<b>8,8</b>	<b>-6,6</b>	<b>57,44 €</b>	<b>73,04 €</b>	<b>19,8</b>	<b>22,8</b>

(\*) Corresponds to hotels and establishments of tourist accommodation of local accommodation with capacity inferior to 10 rooms.  
Fonte: SIREM

Source: Regional Secretariat of Tourism of Madeira. Statistics of Tourism 2023<sup>39</sup>

In 2023, Madeira recorded a total of **10,927,935 bed nights**, representing a 13.6% increase compared to the 9,616,001 bed nights in 2022. This growth highlights a strong recovery and continued momentum in the tourism sector. The increase was driven by both domestic and international visitors, with Germany, the United Kingdom, and Portugal being the top contributors. This positive trend underscores Madeira's appeal as a premier tourist destination, attracting a growing number of visitors year over year. (Table 66).

The **accumulated bed occupancy rate** for in 2023 was **65.2%**, a decrease of **5.0 %** compared to 2022. (Table 66).

In 2023, the largest share of bed nights in Madeira came from **Germany**, accounting for **20.4%** of the total. The **United Kingdom** followed with **19.4%**, while nationals from **Portugal** ranked third with **16.5%**. **France** contributed **7.0%**, Poland 5.5%, the Netherlands 3.5%, and Spain 2.0% (Table 67).

The **average length of stay** in Madeira was **4.62 nights**, slightly lower than the 4.64 nights recorded in 2022. Visitors from Finland had the longest average stays, with 9.60 nights, followed by tourists from Austria with 5.17 nights, and Germany with 5.12 nights. Other notable averages included the Netherlands at 4.96 nights and Switzerland at 4.56 nights (Table 67).

Table 67. Bed nights and average length of stay by country of residence in Madeira.

Dormidas no Alojamento Turístico (\*) Segundo os Principais Mercados - Região Autónoma da Madeira  
Bednights per country of residence

Dezembro - December					DORMIDAS Bednights	Janeiro a Dezembro - January to December					ESTADA MÉDIA - Average length of stay (em dias) - (in days)				Ranking Acumulado	
2022	2023	Δ	Quota de Mercado Market Share (%)		Países (Countries)	2022	2023	Δ	Quota de Mercado Market Share (%)		2022	2023	Acumulado		2022	2023
		2023/2022	2022	2023				2023/2022	2022	2023			2022	2023		
109 614	109 425	-1.7%	16.4%	15.7%	Portugal (pt)	1 713 800	1 891 989	8.2%	17.8%	18.0%	3.07	3.08	3.26	3.38	5	5
144 379	152 091	8.3%	21.0%	22.0%	Alemanha (de)	1 849 109	2 231 970	14.7%	20.2%	20.4%	3.86	3.93	3.96	3.94	2	1
9 172	9 893	8.0%	0.9%	1.0%	Áustria (at)	512 900	547 837	10.6%	1.2%	1.4%	4.54	4.78	5.17	4.94	18	16
9 091	7 383	-22.2%	0.9%	0.7%	Bélgica (be)	164 242	191 849	15.7%	1.7%	1.8%	3.88	4.02	4.46	4.20	11	11
10 960	10 400	-5.1%	1.4%	1.3%	Dinamarca (dk)	184 580	189 744	2.8%	2.0%	1.8%	3.74	3.30	3.72	3.22	9	10
17 200	18 237	6.0%	2.4%	2.4%	Espanha (es)	222 280	279 936	25.6%	2.3%	2.8%	3.80	3.71	4.28	4.13	7	7
980	890	-9.2%	0.1%	0.1%	Estónia (ee)	17 290	18 212	4.8%	0.2%	0.1%	4.52	4.58	4.89	4.58	26	25
24 890	18 021	-27.6%	3.2%	2.4%	Finlândia (fi)	181 880	168 027	-7.6%	2.3%	1.7%	3.98	4.02	4.23	4.08	10	14
26 179	23 910	-8.7%	3.6%	3.4%	França (fr)	679 487	769 875	13.3%	7.1%	7.0%	3.80	3.86	4.34	4.01	4	4
9 275	9 894	6.7%	0.9%	1.0%	Hungria (hu)	40 695	104 820	159.0%	0.5%	1.0%	4.37	4.22	4.84	4.37	21	17
9 120	9 180	0.7%	0.9%	0.9%	Irlanda (ie)	80 280	80 910	0.8%	0.8%	0.8%	4.45	4.82	5.03	4.89	18	19
9 054	9 018	-0.4%	1.0%	1.0%	Ítalia (it)	111 238	182 740	64.3%	1.2%	1.7%	3.84	3.25	3.58	3.95	16	12
2 775	2 535	-8.6%	0.4%	0.4%	Luxemburgo (lu)	33 781	33 285	-1.5%	0.4%	0.3%	3.84	3.43	3.64	3.17	23	23
13 828	19 170	38.0%	1.7%	2.8%	Países Baixos (nl)	242 888	384 720	57.2%	3.8%	3.0%	3.73	4.82	4.96	4.81	6	6
33 618	46 757	39.1%	4.6%	6.4%	Polónia (pl)	467 214	603 134	29.1%	4.9%	6.0%	4.80	4.88	5.42	5.22	8	8
100 231	140 578	40.3%	14.3%	20.2%	Reino Unido (gb)	2 091 298	2 122 297	1.5%	21.3%	18.4%	3.72	3.81	3.87	3.78	1	2
6 380	12 234	92.0%	0.7%	1.3%	República Checa (cz)	201 804	270 620	34.2%	2.1%	2.0%	4.04	4.38	4.82	4.37	9	9
2 798	3 884	39.0%	0.4%	0.6%	România (ro)	98 230	19 794	-20.0%	0.9%	0.6%	3.67	3.58	4.32	4.08	19	21
14 172	11 883	-16.2%	1.7%	1.7%	Suécia (se)	117 038	123 413	5.4%	1.2%	1.1%	3.88	3.41	3.88	3.46	14	16
7 108	7 324	3.0%	0.7%	0.7%	Noruega (no)	83 076	85 988	3.5%	0.9%	0.8%	3.88	3.80	4.30	4.02	17	20
3 520	2 340	-33.8%	0.4%	0.3%	Rússia (ru)	29 288	27 542	-6.0%	0.3%	0.3%	3.88	3.79	4.35	3.72	24	24
8 074	10 313	26.3%	1.0%	1.0%	Suíça (ch)	142 628	178 580	25.2%	1.5%	1.6%	4.08	4.30	4.49	4.30	13	13
3 441	3 448	0.2%	0.3%	0.3%	Brasil (br)	40 180	48 410	20.0%	0.4%	0.4%	3.90	3.73	4.00	3.85	22	22
4 940	5 816	18.0%	0.7%	0.8%	Canadá (ca)	59 798	108 447	81.2%	0.6%	0.9%	4.47	4.01	4.25	4.00	20	18
12 371	14 862	19.3%	1.3%	2.2%	USA (us)	143 142	212 322	49.0%	1.5%	2.0%	4.00	3.88	3.89	3.77	12	9
20 354	22 247	10.3%	4.4%	4.8%	Outros (others)	373 828	480 937	28.1%	3.9%	4.4%	4.01	4.32	4.69	4.30		
667 346	691 182	3.6%	100.0%	100.0%	Total	9 818 664	10 927 838	11.1%	100.0%	100.0%	4.84	4.43	4.88	4.66		

Fonte: DARS  
(\*) Inclui Alojamentos Turísticos, Turismo de Habitação e Rural e Alojamento Local

Source: Regional Secretariat of Tourism of Madeira. Statistics of Tourism 2023<sup>39</sup>

The data on total and lodging receipts in Madeira for 2023 reveals a noticeable **seasonality** in tourism revenues. The highest receipts were recorded during the summer months, particularly in **August** (total receipts: € 76,2 million; lodging receipts: € 55,9 million), reflecting the peak tourist season when visitor numbers and spending are typically at their highest. Other strong months include **July** and **September**, with receipts significantly above average. In contrast, the lowest revenues were observed in the early months of the year, such as **January** (total receipts: €36,0; lodging receipts: €24,9 million), highlighting the off-season period. However, these figures still show substantial year-over-year growth, with January alone experiencing an 82.4% increase in total receipts compared to 2022.

Table 68. Total Revenue and Accommodation Revenue in Tourist Lodging in Madeira

Proveitos Totais				Proveitos de Aposento			
	Unidade: euro				Unidade: euro		
	2022	2023	Var. 23/22		2022	2023	Var. 23/22
JAN	19 718 970	35 966 064	82,4%	JAN	13 073 522	24 859 385	90,2%
FEV	21 099 007	37 796 497	79,1%	FEV	13 853 497	26 448 496	90,9%
MAR	33 481 838	48 172 718	43,9%	MAR	22 416 254	34 275 942	52,9%
ABR	43 767 580	53 862 881	23,1%	ABR	30 475 845	38 403 192	26,0%
MAI	49 227 103	58 488 382	18,8%	MAI	34 093 379	41 644 984	22,1%
JUN	53 203 858	59 126 838	11,1%	JUN	36 382 830	41 569 618	14,3%
JUL	61 153 591	69 162 690	13,1%	JUL	43 227 210	49 682 337	14,9%
AGO	65 929 531	76 214 879	15,6%	AGO	47 424 503	55 934 568	17,9%
SET	55 485 355	65 222 025	17,5%	SET	38 634 987	46 153 704	19,5%
OUT	49 336 123	60 082 729	21,8%	OUT	33 820 941	41 303 203	22,1%
NOV	36 632 141	43 562 775	18,9%	NOV	24 934 927	30 005 346	20,9%
DEZ	40 545 599	45 298 019	11,7%	DEZ	26 845 470	30 467 054	13,5%
<b>Acumulado JAN &gt; DEZ</b>	<b>529 580 696</b>	<b>652 956 497</b>	<b>23,3%</b>	<b>Acumulado JAN &gt; DEZ</b>	<b>365 183 365</b>	<b>460 747 829</b>	<b>26,2%</b>

Corresponde a todos os estabelecimentos de alojamento turístico exceto os de alojamento local com capacidade inferior a 10 camas.

Fonte: DREM

Source: Regional Secretariat of Tourism of Madeira. Statistics of Tourism 2023<sup>39</sup>

The bed occupancy rate in Madeira for 2023 also demonstrates a notable variation across the months, reflecting the seasonal nature of tourism on the island. The highest occupancy rates were recorded during the summer, particularly in July (69.0%) and August (68.3%), aligning with the peak tourist season. These months also saw increases in occupancy compared to 2022, with July showing a slight year-on-year growth of 1.3 percentage points (%). In contrast, the lowest occupancy rates were observed in **January** (58.4%) and **December** (48.4%), highlighting the off-season period. However, December experienced a significant year-on-year increase of **19.4 %**, suggesting a growing interest in Madeira as a winter destination. Overall, the cumulative occupancy rate for 2023 stood at **65.2%**, representing a marginal increase of **0.5 %** compared to 2022. While individual months like July and August continue to dominate, the year-round performance indicates steady improvements in occupancy, even during traditionally slower months (Table 69).



Table 69. Occupancy rate by category of accommodation and month in Madeira.

	Acumulado			2023											
	JAN/DEZ			Unidade: %											
	2022	2023	± (p.p.)	JAN	FEV	MAR	ABR	MAI	JUN	JUL	AGO	SET	OUT	NOV	DEZ
<b>TOTAL</b>	<b>61,3</b>	<b>65,2</b>	<b>3,9</b>	<b>61,9</b>	<b>69,0</b>	<b>63,2</b>	<b>67,8</b>	<b>68,4</b>	<b>69,1</b>	<b>72,8</b>	<b>75,3</b>	<b>73,9</b>	<b>67,6</b>	<b>61,0</b>	<b>49,8</b>
<b>HOTELARIA</b>	<b>64,0</b>	<b>67,8</b>	<b>3,9</b>	<b>54,0</b>	<b>61,4</b>	<b>65,4</b>	<b>69,6</b>	<b>70,7</b>	<b>71,8</b>	<b>75,5</b>	<b>79,2</b>	<b>76,9</b>	<b>78,5</b>	<b>64,2</b>	<b>51,8</b>
Hotéis	64,0	66,3	4,2	53,1	60,7	66,0	70,2	72,3	73,8	75,1	78,6	77,6	76,5	65,7	52,1
*****	58,5	60,9	2,4	45,0	47,5	52,0	61,8	65,3	66,2	68,9	73,3	71,2	64,0	62,3	47,4
****	69,0	74,4	5,4	59,5	71,1	74,4	76,2	78,3	79,8	80,6	83,0	83,4	76,8	73,1	57,5
***	63,0	67,6	4,6	53,6	64,9	70,1	75,1	71,5	72,8	73,7	80,4	75,7	66,0	56,8	51,0
**	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
*	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0	0,0
Hotéis-apartamentos	66,9	68,4	2,5	68,1	68,8	68,9	69,4	67,7	67,7	78,8	77,2	76,4	72,8	64,9	50,9
*****	79,0	81,9	2,9	72,1	78,0	76,3	84,0	80,9	82,7	90,2	93,9	86,2	80,8	83,8	66,0
****	64,7	66,4	1,7	59,9	64,8	66,2	66,6	65,0	64,9	77,7	74,3	75,6	72,2	63,7	47,0
***	66,8	72,2	5,4	62,0	70,7	75,9	75,4	74,1	74,5	74,3	84,7	76,5	71,7	64,3	62,2
Apartamentos Turísticos	52,0	55,4	3,4	50,5	44,6	47,4	53,8	53,3	66,5	72,8	72,8	62,6	58,7	35,8	29,7
*****	55,9	0,0	-55,9	0	0	0	0	0	0	0	0	0	0	0	0
****	46,3	59,9	12,6	47,0	55,3	52,7	56,6	55,1	70,7	74,5	71,4	72,7	63,2	47,7	38,4
***	0,0	52,0	52,0	53,6	34,7	42,5	52,1	51,6	62,4	71,2	72,6	52,6	54,6	25,0	42,0
Aldeamentos Turísticos	49,1	52,6	3,5	44,6	58,2	61,1	67,4	49,6	59,6	71,5	79,8	59,7	48,3	36,3	24,2
****	49,1	52,6	3,5	44,0	56,2	61,1	67,4	49,0	50,5	71,5	79,8	59,7	48,3	36,3	24,2
Pousadas e Quintas de Madeira	65,1	67,9	2,8	62,6	67,6	69,6	72,1	76,2	74,8	73,8	75,4	62,2	71,8	60,2	49,9
<b>TURISMO NO ESPAÇO RURAL E DE HABITAÇÃO</b>	<b>51,7</b>	<b>57,0</b>	<b>5,2</b>	<b>43,4</b>	<b>54,4</b>	<b>57,5</b>	<b>60,2</b>	<b>61,8</b>	<b>59,5</b>	<b>62,8</b>	<b>67,3</b>	<b>63,6</b>	<b>58,0</b>	<b>51,2</b>	<b>41,7</b>
<b>ALOJAMENTO LOCAL</b> (menos de 10 camas)	<b>44,1</b>	<b>49,8</b>	<b>5,7</b>	<b>39,4</b>	<b>44,2</b>	<b>49,2</b>	<b>55,4</b>	<b>54,9</b>	<b>52,6</b>	<b>55,9</b>	<b>56,8</b>	<b>56,1</b>	<b>58,4</b>	<b>42,7</b>	<b>39,6</b>

p.p. = pontos percentuais  
Corresponde a todos os estabelecimentos de alojamento turístico exceto os de alojamento local com capacidade inferior a 10 camas.  
Fonte: DREM

Source: Regional Secretariat of Tourism of Madeira. Statistics of Tourism 2023<sup>39</sup>

The bed occupancy rate in Madeira for 2023, analysed by accommodation category, shows improvements across most segments compared to 2022. The overall occupancy rate increased from 61.3% in 2022 to 65.2% in 2023, a growth of 3.9% (Table 69).

- **Hotels** experienced an increase from 64.0% to 67.8%, also gaining 3.9%, with five-star hotels rising from 58.5% to 60.9% (+2.4%) and four-star hotels seeing a larger increase from 64.0% to 69.1% (+5.1%).
- **Aparthotels** achieved the highest occupancy growth, with an increase of 5.4%, climbing from 66.9% to 72.2%, particularly among four-star aparthotels, which rose from 66.4% to 72.4% (+5.9%).
- **Tourist apartments** improved from 52.0% to 55.4%, gaining 3.4%, and tourist villages increased from 49.1% to 52.6%, up by 3.5%.
- **In rural and housing tourism**, the occupancy rate rose from 51.7% to 57.0%, representing an increase of 5.2%, while local accommodation saw a significant jump from 44.1% to 49.8%, with a gain of 5.7%.

## Azores

The following sources provide detailed data on the evolution of tourism in the Azores:

- **Serviço Regional de Estatística dos Açores (SREA)**: This entity provides official statistics on tourism in the Azores, including data on the number of guests and overnight stays in various types of accommodations. ([ine.pt](http://ine.pt))



- **Observatório do Turismo dos Açores (OTA):** OTA offers specialized analyses and updated data on tourism activity in the region. Through its "Regional Tourism Performance Dashboard," users can access statistics on the number of guests, overnight stays, average stays, and other key indicators. ([otacores.com](https://otacores.com))
- **Portal do Turismo dos Açores:** This portal provides statistics on the evolution of the number of guests and overnight stays in the Autonomous Region of the Azores ([turismo.azores.gov.pt](https://turismo.azores.gov.pt))

According with SREA<sup>40</sup>, between 2010 and 2019, the Azores experienced consistent growth in international tourist arrivals, reaching approximately **400,000 visitors** in 2019. However, the COVID-19 pandemic caused a sharp decline in 2020, with arrivals dropping to **125,000**, around a third of the previous year's figures. The tourism sector began recovering in 2021, and by 2023, tourist accommodations recorded **1.220.236 guests**, and **3.876.246 overnight stays**, reflecting an increase of **14.7% and 15.9% respectively** compared to 2022.

According to the report "Tourism Statistics 2023" from the Serviço Regional de Estatística dos Açores (SREA), the total number of visitors (not only guests at tourist accommodations) the entire archipelago was **1,543,200**. The island of São Miguel accounted for the largest share, welcoming **950,000 guests**, which represents **61.55%** of the region's total. Terceira followed with **265,000 guests (17.18%)**, and Faial ranked third with **140,000 guests (9.07%)**. The islands of Pico and Santa Maria recorded **85,000 guests (5.51%)** and **47,200 guests (3.06%)**, respectively (*Source: SREA and OTA*). These figures emphasize São Miguel as the central hub of tourism in the Azores, while Terceira and Faial also play significant roles as secondary destinations.

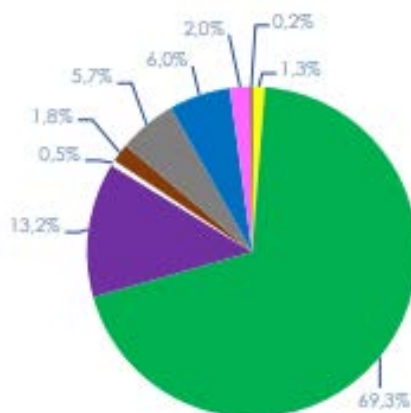
In 2023, the distribution of overnight stays in hotels and local accommodations across the islands of the Azores revealed a significant concentration on **São Miguel**, which accounted for **69.3%** of the total. This highlights São Miguel's dominance as the primary hub for tourism in the archipelago. The second most visited island was **Terceira**, contributing **13.2%** of the overnight stays, followed by **Faial** with **6.0%**, and **Pico** with **5.7%**, emphasizing their roles as important secondary destinations. Smaller shares were recorded on islands such as **São Jorge (2.0%)**, **Santa Maria (1.8%)**, **Flores (1.3%)**, and **Graciosa (0.5%)**. The smallest share was attributed to **Corvo**, representing just **0.2%** of the total overnight stays (Figure 80).

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<sup>40</sup> SREA(2023). ESTATÍSTICAS DO TURISMO AÇORES 2023. Available at the date of report on <https://srea.azores.gov.pt/Conteudos/Media/file.aspx?ida=11865>

Figure 83. Distribution of overnight stays in hotels and local accommodations by island in Azores (2023)

■ Santa Maria ■ São Miguel ■ Terceira ■ Graciosa ■ São Jorge ■ Pico ■ Faial ■ Flores ■ Corvo



Source: SREA (2023)<sup>40</sup>

Overall, total overnight stays increased from **3,345,570** in 2022 to **3,876,246** in 2023, reflecting a growth of **15.9%** year-over-year (Table 70).

In 2023, domestic visitors from Portugal accounted for **1,338,678 overnight stays**, representing **34.5%** of the total. This marks a slight increase of **0.6%** compared to 2022, showcasing the consistent importance of the domestic market to the Azorean tourism industry. While growth in the domestic segment was modest, it remains a vital part of the region's overall tourism activity.

The international market experienced a significant increase in overnight stays, rising from **2,014,487** in 2022 to **2,537,568** in 2023, a growth of **26.0%**. Germany emerged as the largest source of international visitors, contributing **431,300 overnight stays**, which accounted for **11.1%** of the total. This reflects a growth of **17.4%** from 2022. The United States followed as the second-largest market, with **423,148 overnight stays**, representing **10.9%** of the total, and saw a notable increase of **41.3%** year-over-year.

France was another major contributor to international overnight stays, with **267,941 stays** in 2023, comprising **6.9%** of the total, and demonstrating an impressive growth of **29.3%**. The Netherlands accounted for **149,600 overnight stays**, or **3.9%**, reflecting a year-on-year increase of **29.7%**. Spain also made a significant contribution with **129,609 overnight stays**, representing **3.3%** of the total and a growth of **23.9%**.

Smaller markets like Belgium and Canada showed remarkable growth rates as well, with Belgium accounting for **69,497 overnight stays** (or **1.8%**) and growing by **30.5%**, and Canada contributing **53,163 overnight stays** (or **1.4%**) with a growth of **50.1%**.

Table 70. Overnight Stays by Country of Residence in Azores

Country/Region	2022 Overnight Stays	2023 Overnight Stays	2023 Growth (%)
Portugal	1,331,083	1,338,678	0.6
Germany	367,256	431,300	17.4
Austria	39,607	58,238	47
Belgium	49,697	64,697	30.5
Canada	35,393	53,163	50.1
Czech Republic	21,440	29,128	35.9
Denmark	61,917	77,560	25.2
Spain	104,589	129,609	23.9
United States	299,463	423,148	41.3
France	207,222	267,941	29.3
Hungary	26,286	34,719	32.1
Israel	21,662	27,692	27.8
Italy	76,791	85,894	11.8
Netherlands	113,847	149,600	29.7
Poland	120,736	145,313	20.3
United Kingdom	72,707	89,762	23.4
Switzerland	30,270	33,693	11.3
Sweden	27,702	30,109	8.7
Other Countries	174,619	228,297	30.7
<b>Total</b>	<b>3,345,570</b>	<b>3,876,246</b>	<b>15.9</b>

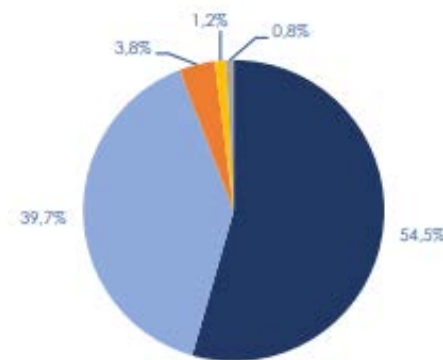
Source: SREA (2023)<sup>40</sup>

In 2023, most overnight stays in the Azores were concentrated in **hotels**, which accounted for **54.5%** of the total. **Local accommodations** were the second most popular choice, representing **39.7%** of all overnight stays, highlighting their growing appeal among visitors seeking more flexible and independent lodging options.

Smaller shares were observed for other types of accommodations, such as **rural tourism** establishments, which accounted for **3.8%**, and **camping parks**, contributing **1.2%**. **Youth hostels** registered the smallest share, with only **0.8%** of total overnight stays.

Figure 84. Overnight stays by type of accommodation. Azores 2023

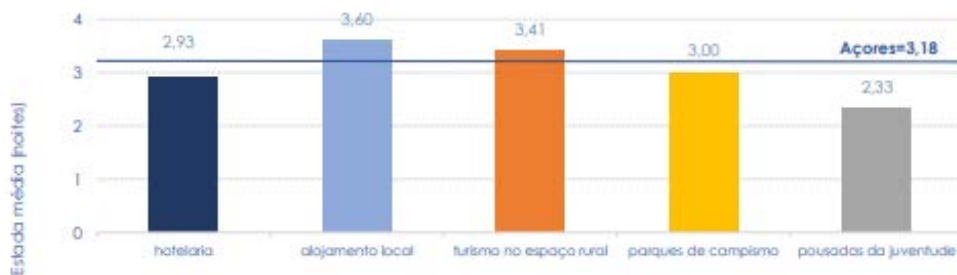
■ hotelaria ■ alojamento local ■ turismo no espaço rural ■ parques de campismo ■ pousadas de juventude



Source: SREA (2023)<sup>40</sup>

In 2023, the **average length of stay** across all types of accommodations in the Azores was **3.18 nights**, reflecting a balanced duration for visitors. Among the diverse types of establishments, local accommodation recorded the highest average stay at 3.60 nights, followed closely by rural tourism accommodations, which had an average of 3.41 nights. Camping parks registered an average stay of 3.00 nights, indicating consistency with the overall average. Hotels, a key component of the region's accommodation infrastructure, had an average length of stay of 2.93 nights, slightly below the general average. Meanwhile, youth hostels experienced the shortest stays, with an average of 2.33 nights. These figures highlight the variation in visitor behaviour across accommodation types, with local and rural options attracting longer stays, likely due to their appeal for immersive and tranquil experiences.

Figure 85. Average stay across all types of accommodation, Azores (2023).



Source: SREA (2023)<sup>40</sup>

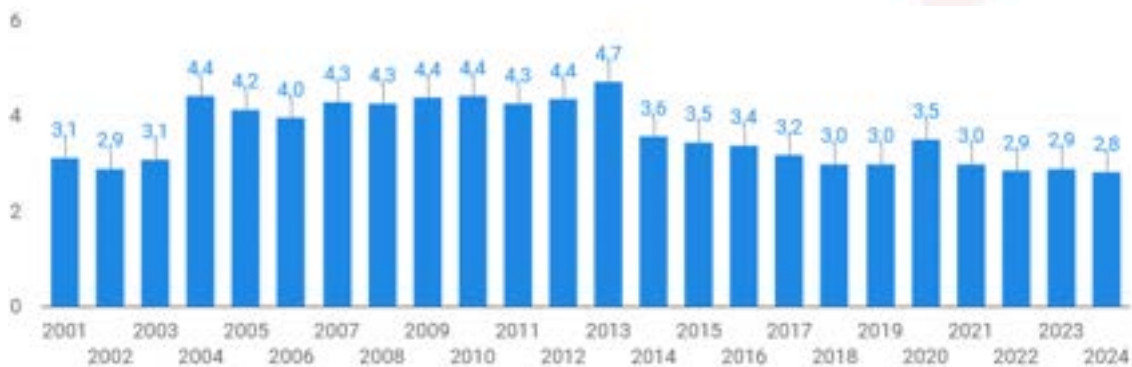
Data from OTA are slightly different who states that in 2023 the average length of stay was 2,8 (instead of 3,2). However, OTA offers data to evaluate the evolution of such a ratio from 2001 to 2024. Over the years, the data reveals a clear downward trend, indicating a steady decline in the average duration of stays.

In the early 2000s, the average length of stay was relatively high, starting at 3.1 nights in 2001 and peaking at 4.7 nights in 2013. Between 2004 and 2013, the duration remained consistently above 4 nights, marking a period when visitors spent more time in the region.

After 2013, however, the trend shifted, with the average stay gradually decreasing. By 2016, it had dropped to 3.2 nights, and further reductions were observed in subsequent years. Between 2018 and 2020, the average length hovered around 3.0 nights, signalling a stabilization at lower levels.

In the post-pandemic period, the decline persisted, with the average length of stay falling to 2.9 nights in 2022 and 2.8 nights in 2024. This ongoing reduction highlights changing visitor behaviours, possibly influenced by the rise of shorter trips and more dynamic travel preferences. The data underscores a shift in tourism patterns, reflecting shorter stays despite a consistent influx of tourists.

Figure 86. Evolution of Average Length of Stay in the Azores (2001-2024)



Source: *Dashboard Desempenho Turístico Regional of OTA*<sup>41</sup>

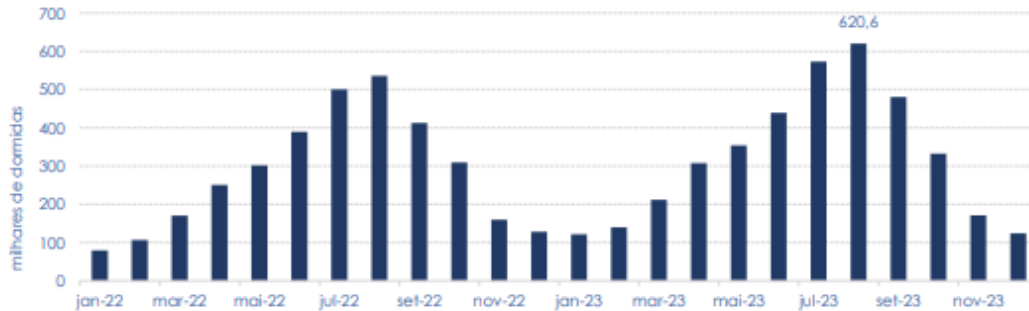
The number of overnight stays in all types of accommodations in the Azores from January 2022 to November 2023, measured in thousands. The data highlights a **clear pattern of strong seasonality** in tourism activity across the region (Figure 84).

Overnight stays consistently peak during the summer months, with the highest figure recorded in July 2023 at 620.6 thousand stays, reflecting the Azores' appeal as a summer destination. Other summer months, such as August and September, also show significantly higher overnight stays compared to the rest of the year.

In contrast, the winter months, including January and February, exhibit much lower overnight stays, reflecting a reduced level of tourism activity during the off-season. This pronounced seasonality demonstrates the region's reliance on summer tourism and highlights the challenges of maintaining consistent tourism activity throughout the year.

<sup>41</sup> Data available on line at <https://otacores.com/estatistica/dashboard-desempenho-turistico-regional/>

Figure 87. Overnight stays in the Azores from January 2022 to November 2023



Source: SREA (2023)<sup>40</sup>

This stationarity it is also observed looking at the total monthly revenues generated by the tourism sector in the Azores.

- August stands out as the most profitable month, generating €26.26 million, followed by July with €24.03 million and September with €21.33 million. These months coincide with the peak tourist season, reflecting the high influx of visitors during this period.
- In contrast, the lowest revenues are recorded during the winter months, with January generating only €4.13 million and February slightly higher at €4.76 million. Revenues begin to rise gradually in the spring, reaching €11.58 million in April and €15.16 million in May, before surging significantly in the summer.
- The trend declines again after September, with October generating €14.06 million, November €6.12 million, and December €5.16 million. These figures highlight the significant impact of seasonality on the Azorean tourism industry, with a clear reliance on summer and early autumn for the majority of annual revenue.

Figure 88. Monthly Total Revenue in the Tourism Sector (Azores). Year 2023



Source: Dashboard Desempenho Turístico Regional of OTA<sup>42</sup>

<sup>42</sup> Data available on line at <https://otacores.com/estatistica/dashboard-desempenho-turistico-regional/>



**SREA** provides comprehensive data on the tourism sector in the Azores from 2001 to 2023, enabling an in-depth analysis of the annual evolution of key indicators. The dataset includes essential metrics such as the number of guests, overnight stays, average length of stay, and tourism revenues, offering valuable insights into the long-term trends and significant turning points in the region's tourism development (Table 71). Some of the most relevant conclusions are:

- The **number of guests** in the Azores has shown significant growth from 2001 to 2023, increasing from 237,609 to 720,051, with a **CAGR of 5.17%**. However, this growth has been punctuated by two major declines due to economic crises. The first occurred during the global financial crisis, leading to a drop from 353,479 guests in 2008 to 327,901 in 2009, with recovery beginning in 2010. The second, more severe decline was caused by the COVID-19 pandemic, which reduced guest numbers dramatically from 643,634 in 2019 to just 199,133 in 2020, representing a near standstill in tourism. Despite these challenges, the sector has rebounded strongly, surpassing pre-pandemic levels in 2022 and reaching its highest recorded number of guests in 2023, showcasing the resilience and growing appeal of the Azores as a tourism destination (Figure 86).
- Parallel to the growth in guest numbers, **overnight stays** also exhibited a similar upward trend, rising from 725,068 in 2001 to 2,110,933 in 2023, with a **CAGR of 4.98%**. This growth was marked by two significant declines due to global crises. The first occurred during the financial crisis, where overnight stays decreased from 1,184,375 in 2007 to 1,004,804 in 2009, reflecting a contraction in tourism activity. The second and sharper drop was observed during the COVID-19 pandemic, as overnight stays plummeted from 1,896,055 in 2019 to only 536,239 in 2020, a stark reduction. Nonetheless, the sector has since recovered, reaching a record high in 2023, underscoring the resilience and recovery of the Azorean tourism industry (Figure 87).
- Similarly, **Incomes from tourism** have followed a similar trajectory, rising from €32,837,383 in 2001 to €158,568,559 in 2023, with a **CAGR of 7.42%**. However, the evolution was interrupted by two major downturns. The first decline occurred during the financial crisis, with incomes dropping from €54,964,538 in 2007 to €49,163,181 in 2009, reflecting reduced spending and tourism activity. The second and far more severe decline was due to the COVID-19 pandemic, as incomes fell sharply from €104,512,473 in 2019 to just €26,359,396 in 2020, a reduction of nearly 75%. Despite these challenges, the sector has demonstrated remarkable resilience, achieving record-high revenues in 2023, underscoring the recovery and growing economic importance of tourism in the Azores (Figure 88).
- As stated above **the average length of stay** has shown a **gradual decline** over the years, decreasing from 3.1 days in 2001 to 2.8 days in 2023, with a CAGR of -0.46%. This downward trend reflects changing travel behaviours, as shorter stays became more common. Despite periods of recovery, such as the stabilization at 3.0 days during the mid-2010s, significant drops were observed during global crises. During the financial crisis, the average length of stay fell from 3.4 days in 2008 to 3.0 days in 2009, while the

COVID-19 pandemic led to an even sharper decline to 2.2 days in 2020. Although the recovery has been gradual, the average stay remains below early 2000s levels, reflecting **shifts toward shorter trips in modern tourism patterns** (Figure 89).

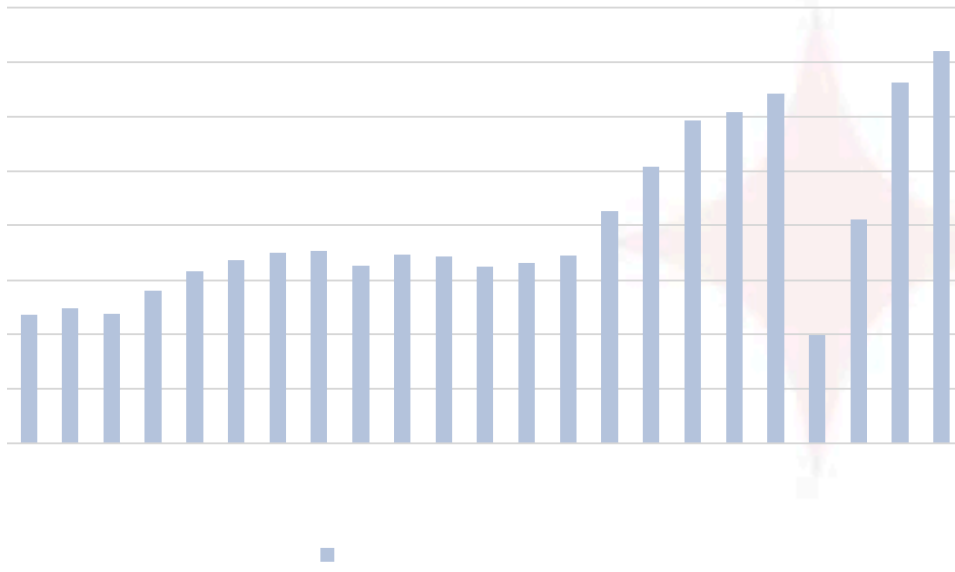
Table 71. Evolution of the tourism in Azores. Key Figures 2001-2023

YEAR	Guests (number)	Overnight stays (number)	Average Length of Stay (days)	Incomes (Euros)
2001	237,609	725,068	3.1	32,837,383
2002	248,725	776,613	3.2	36,031,500
2003	239,797	804,403	3.4	38,500,278
2004	281,409	964,936	3.5	45,278,054
2005	316,961	1,136,452	3.6	52,565,709
2006	337,000	1,179,371	3.4	54,125,629
2007	350,829	1,184,375	3.3	54,964,538
2008	353,479	1,127,513	3.1	54,633,968
2009	327,901	1,004,804	3.0	49,163,181
2010	347,902	1,035,031	2.9	48,904,708
2011	344,595	1,033,525	2.9	46,852,107
2012	326,370	954,740	2.8	41,984,795
2013	331,587	1,050,018	3.0	44,672,444
2014	345,594	1,063,775	2.9	44,620,296
2015	428,012	1,274,207	2.9	54,300,675
2016	509,060	1,543,595	3.0	70,678,957
2017	594,169	1,787,459	2.9	87,622,277
2018	609,859	1,789,349	2.9	94,512,917
2019	643,634	1,896,055	2.9	104,512,473
2020	199,133	536,239	2.2	26,359,396
2021	411,197	1,188,998	2.7	67,651,345
2022	662,286	1,977,834	2.9	128,167,488
2023	720,051	2,110,933	2.8	158,568,559

Source: SREA<sup>43</sup>

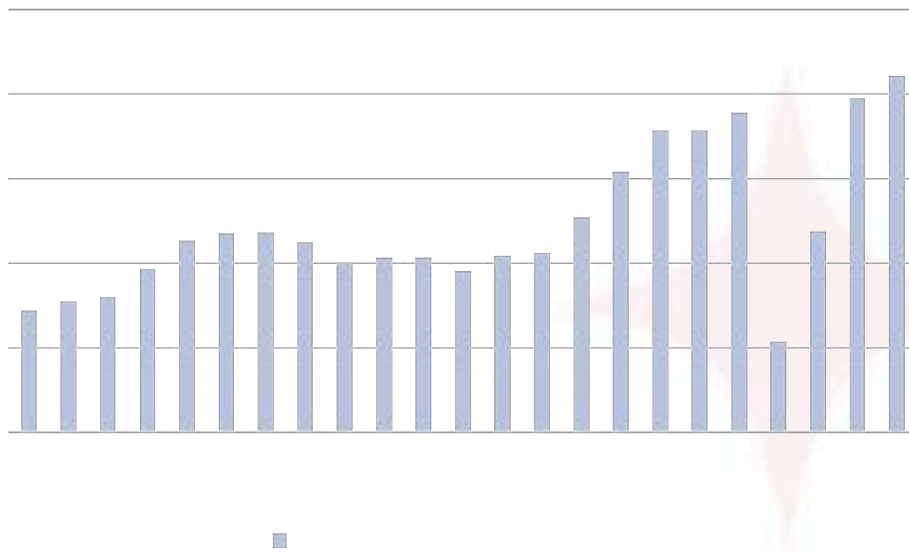
<sup>43</sup> SREA. International Tourism Series. Data available on line on <https://srea.azores.gov.pt/ReportServer/Pages/ReportViewer.aspx?%2fSeries%2fDormidasHotelariaTradicional>

Figure 89. Guest Numbers in Azores. Year 2001-2023



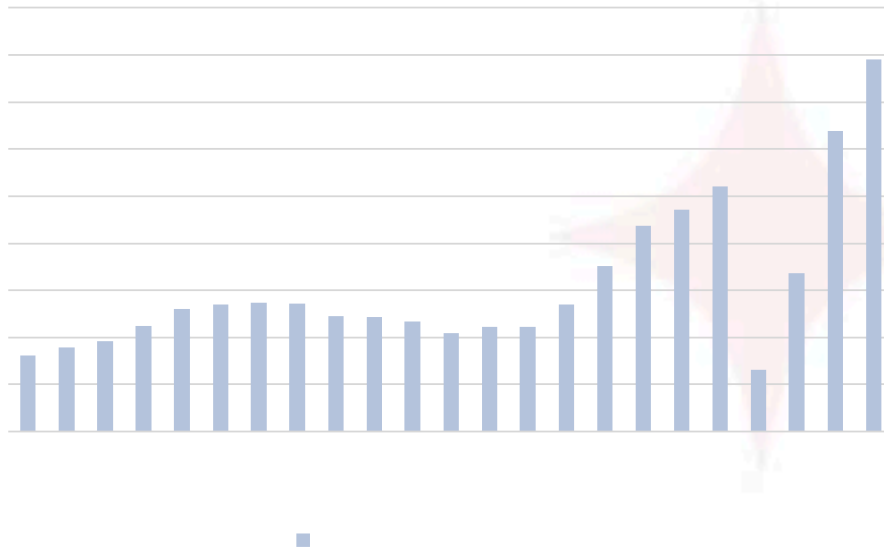
Source: Own elaboration based on SREA<sup>43</sup>

Figure 90. Overnight stays in Azores. Year 2001-2023



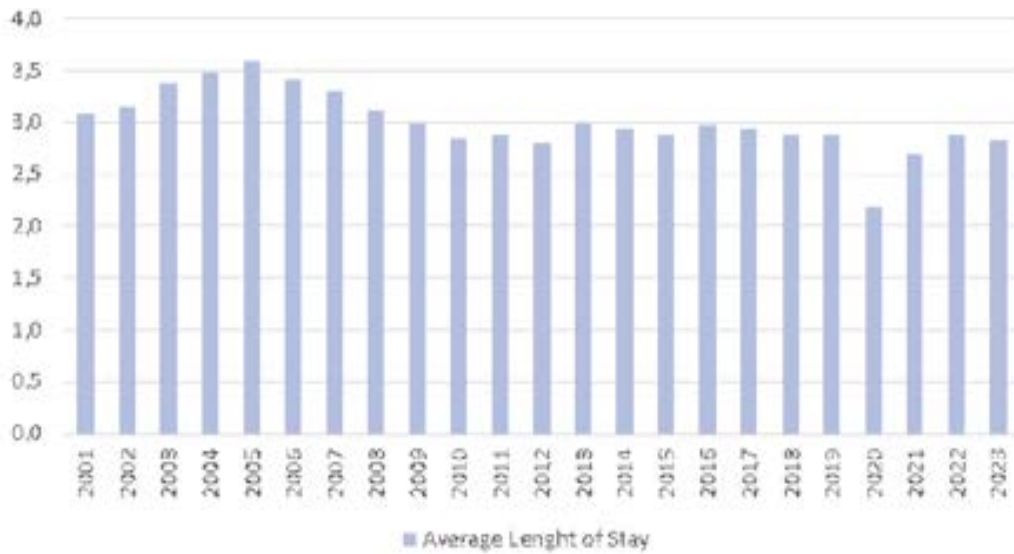
Source: Own elaboration based on SREA<sup>43</sup>

Figure 91. Incomes in accommodation in Azores. Year 2001-2023



Source: Own elaboration based on SREA<sup>43</sup>

Figure 92. Average Length of Stay in Azores. Year 2001-2023



Source: Own elaboration based on SREA<sup>43</sup>

### Martinique

The following sources provide detailed data on the evolution of tourism in Martinique:

- **Institut National de la Statistique et des Études Économiques (INSEE)**: INSEE offers comprehensive statistics on tourism in Martinique, including data on tourist arrivals, overnight stays, and economic impacts. For instance, in 2023, tourist arrivals in Martinique increased by 39% compared to 2022, surpassing one million visitors.
- **Comité Martiniquais du Tourisme (CMT)**: The CMT provides insights into tourism trends, visitor demographics, and satisfaction levels. Their reports detail the distribution of tourists by origin, age, and accommodation preferences, highlighting that in 2023, 68.4% of tourists originated from mainland France.

According with INSEE Martinique welcomed **1,001,854 visitors**, marking a 39% increase compared to 2022 and surpassing pre-pandemic levels by 3.9% (Table 72).

- The data categorizes visitors to Martinique into two main groups: **excursionists** and **tourists**. Excursionists are visitors who do not spend the night on the island, and this group primarily consists of **cruise passengers**, who accounted for the majority of excursionists in 2023, with **290,419 visitors**, representing **77.6%** of all excursionists. The remaining **83,483 excursionists** fall into the category of "other excursionists," which includes day-trippers arriving by ferry or other means of transport.
- On the other hand, **tourists** are visitors who stay overnight in Martinique. Among them, the majority (**556,093 tourists**) consist of those staying in various types of accommodations on the island, reflecting their contribution to longer stays and the local economy. Another smaller subgroup within tourists is **sailing tourists**, who arrive and stay aboard yachts or other private boats, accounting for **71,858 visitors in 2023**. This distinction between excursionists and tourists highlights the significant role of cruise tourism in attracting day visitors while also emphasizing the importance of overnight stays in sustaining the island's tourism economy.

Table 72. Visitors to Martinique. Year 2022-2023

Type of Visitors	2022	2023	Evolution 2022-2023 (%)	Evolution 2019-2023 (%)
<b>Total excursionists</b>	<b>105,098</b>	<b>373,903</b>	<b>255.8</b>	<b>3.1</b>
Cruise passengers	75,355	290,419	285.4	1.9
Other excursionists	29,743	83,483	180.7	7.8
<b>Total tourists</b>	<b>614,904</b>	<b>627,951</b>	<b>2.1</b>	<b>4.4</b>
Overnight stays	556,159	556,093	0	0
Sailing tourists	58,745	71,858	22.3	59.4
<b>Total visitors</b>	<b>720,002</b>	<b>1,001,854</b>	<b>39.1</b>	<b>3.9</b>

Source: INSS

In 2023, the majority of tourists to Martinique originated from **mainland France**, representing **68.4%** of all visitors. This highlights a significant reliance on the domestic market, a trend that is

notably stronger in Martinique compared to regions like the Canary Islands, Madeira, or the Azores, where international visitors comprise a much larger proportion of the total. The **Caribbean region** was the second-largest contributor, accounting for **21.2%** of visitors, emphasizing the island's strong regional appeal and its role as a key destination within the Caribbean network.

Additionally, the distribution of tourists reveals a **higher concentration from Francophone countries**, further underscoring Martinique's cultural and linguistic ties. **Canada** contributed **4.4%**, while **Belgium**, another French-speaking country, accounted for **1.4%**.

Another factor influencing Martinique's visitor profile is its geographic location and the **significant distance in flight to Europe**. Unlike Madeira or the Canary Islands, which are closer to European markets, Martinique's distance makes it **less attractive for short stays**. This geographic challenge tends to favour longer visits, as travellers from Europe are more likely to plan extended stays to make the long journey worthwhile.

In Martinique, the majority of overnight tourists opt for non-hotel accommodations such as villas, apartments, and tourist residences, which account for **51.6%** of the total annual lodging distribution. This figure marks a significant increase compared to **40.7% in 2022** and **45.5% in 2019**, indicating a growing preference for flexible, private lodging options. On the other hand, staying with friends or relatives has decreased, representing **23.5%** of accommodations in 2023, down from **31.5% in 2022**. However, this remains slightly above the **21.6% level recorded in 2019**, showing a steady but reduced role for this type of lodging.

Hotels and vacation resorts together attract **20.6%** of overnight tourists, highlighting their continued relevance, albeit less dominant than private accommodations. Hotels alone account for **14.3%**, while vacation resorts contribute **6.3%** of the lodging distribution. Other types of accommodations, including niche or specialized options, represent a smaller **4.3%** of the total.

Table 73. Breakdown of accommodation per type. Martinique

Accommodation Type	Tourist Distribution (%)
Residences, apartments, and rented villas	51.6
Friends/Relatives	23.5
Hotels	14.3
Vacation resorts	6.3
Others	4.3
Total	100

Source: INSS

The table below presents the percentage data of hotel occupancy in Martinique by month and year, covering the period from 2011 to 2023. Each row represents a specific month, while the columns display occupancy rates for each year, with the last column showing the average monthly occupancy across the entire series. The final three rows summarize the data: AVERAGE indicates the average annual occupancy at the end of each column and the overall average of each month in the last column; MAXIMUM highlights the highest occupancy rate recorded for each year; and MAX. MONTH specifies the month with the highest occupancy for each year.



Table 74. Evolution of occupancy rate. Martinique

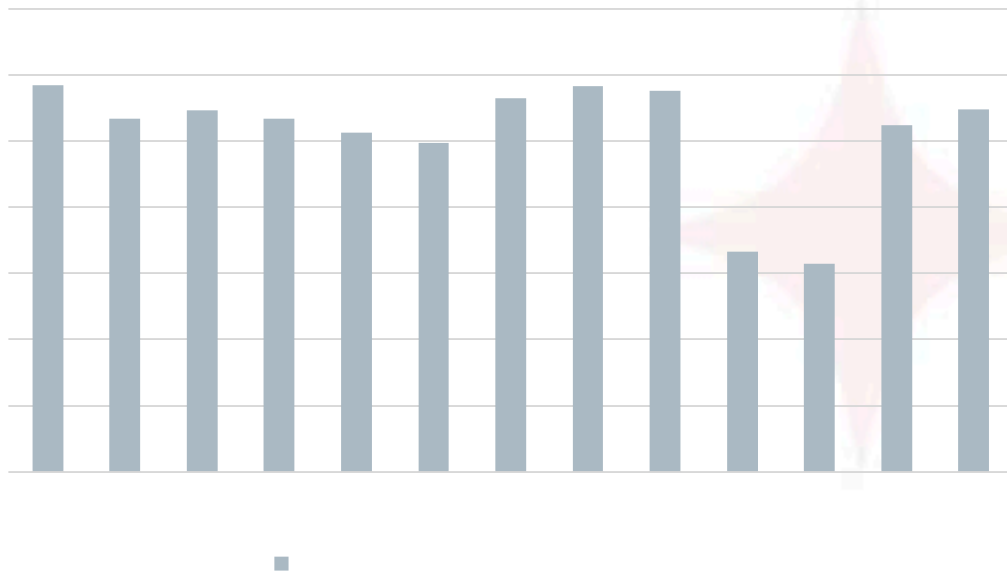
Month	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	AVERAGE
jan	63.0	61.0	62.3	58.2	58.6	59.2	68.0	65.1	70.6	25.8	46.1	60.7	60.0	<b>58.3</b>
feb	59.4	51.2	52.5	48.5	48.6	51.0	58.2	58.8	56.3	14.5	40.1	56.8	57.4	<b>50.3</b>
mar	43.0	36.3	42.8	42.6	40.5	41.1	48.1	43.3	42.6	32.3	33.7	43.0	38.2	<b>40.6</b>
apr	31.5	25.4	26.3	26.1	27.2	24.3	35.5	30.7	26.8	18.7	27.0	25.9	23.7	<b>26.8</b>
may	63.2	59.9	58.8	53.7	50.2	52.6	61.0	62.8	57.2	46.7	36.2	60.1	55.6	<b>55.2</b>
jun	49.9	47.4	45.5	43.0	42.4	43.4	50.0	51.1	48.0	30.2	54.4	55.6	52.0	<b>47.1</b>
jul	43.9	31.3	31.8	33.1	31.6	28.4	32.4	34.1	41.7	10.0	24.5	42.7	38.7	<b>32.6</b>
aug	56.5	49.9	55.6	51.7	50.7	43.3	48.0	53.8	50.5	2.3	21.0	48.4	48.3	<b>44.6</b>
sep	66.3	57.1	62.8	62.7	63.2	51.0	64.5	64.2	65.4	1.7	9.6	61.9	66.0	<b>53.6</b>
oct	75.3	72.7	73.3	74.2	71.3	70.2	75.0	79.3	80.6	63.9	17.8	67.0	73.3	<b>68.8</b>
nov	74.5	73.7	70.9	73.8	67.9	66.7	68.0	76.9	74.6	75.8	24.7	56.2	69.8	<b>67.2</b>
dec	76.1	76.8	74.3	73.9	64.8	66.5	71.0	79.9	78.4	78.5	44.0	52.0	75.3	<b>70.1</b>
<b>AVERAGE</b>	<b>58.5</b>	<b>53.5</b>	<b>54.7</b>	<b>53.5</b>	<b>51.4</b>	<b>49.8</b>	<b>56.6</b>	<b>58.3</b>	<b>57.7</b>	<b>33.4</b>	<b>31.6</b>	<b>52.5</b>	<b>54.9</b>	<b>51.3</b>
<b>MAXIMUM</b>	<b>76.1</b>	<b>76.8</b>	<b>74.3</b>	<b>74.2</b>	<b>71.3</b>	<b>70.2</b>	<b>75.0</b>	<b>79.9</b>	<b>80.6</b>	<b>78.5</b>	<b>54.4</b>	<b>67.0</b>	<b>75.3</b>	<b>70.1</b>
<b>MAX. MONTH</b>														
	dec	dec	dec	oct	oct	oct	oct	dec	oct	dec	jun	oct	dec	dec

Source: Own elaboration based on data of INSS<sup>44</sup>

The **average hotel occupancy** trend in Martinique from 2011 to 2023 shows slight variations over the years, with periods of stability followed by significant declines linked to events such as the COVID-19 pandemic and the global financial crisis. In the years prior to the pandemic, average occupancy rates remained between 50% and 58%, with minor fluctuations. However, in 2020, average occupancy plummeted to 33.4% and 31.6% in 2021. By 2022 and 2023, there was a more robust recovery, with average occupancy rates reaching 52.5% and 54.9%, respectively, close but not at pre-pandemic levels.

<sup>44</sup> Database available at the date of the report on <https://www.insee.fr/fr/statistiques/serie/010609623#Telechargement>

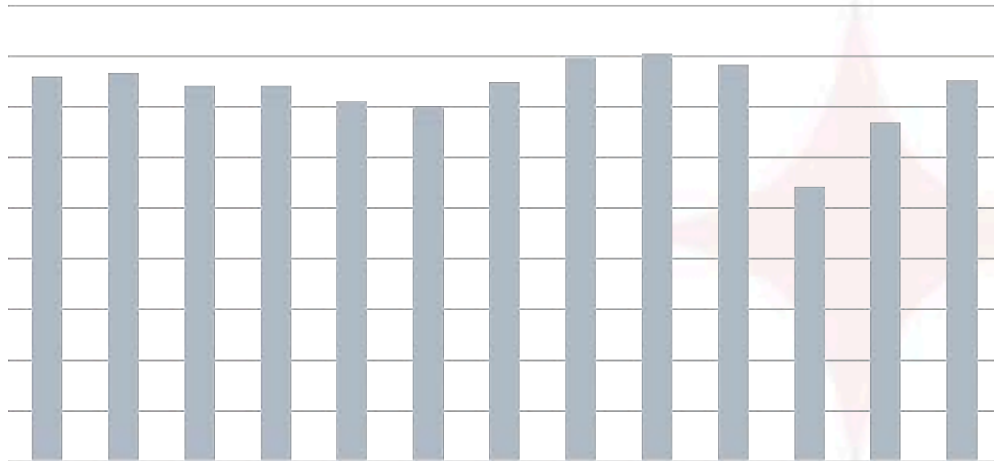
Figure 93. Average hotel Occupancy in Martinique 2011-2023



Source: Own elaboration based on data of INSS<sup>44</sup>

The following graph illustrates the maximum monthly hotel occupancy rates in Martinique for each year from 2011 to 2023, showcasing the highest occupancy achieved annually and its variations over time. Between 2011 and 2019, maximum occupancy rates were consistently high, staying above 70% for most years. The peak was reached in 2018 with a maximum occupancy of **79.9%**, reflecting strong tourism activity during that period. This stability highlights a robust demand for hotel accommodations prior to the global disruptions caused by the COVID-19 pandemic. A significant decline occurred in 2020, when the maximum occupancy dropped to **54.4%**, reflecting the severe impact of the pandemic on the tourism industry due to travel restrictions and health-related uncertainties. While there was a slight recovery in 2021, with a maximum occupancy of **64.4%**, it still remained below pre-pandemic levels, indicating ongoing challenges for the sector. From 2022 onwards, the data shows a notable recovery, with maximum occupancy rising to **67.0%** in 2022 and further improving to **75.3%** in 2023. These figures suggest that the tourism industry in Martinique is rebounding strongly, approaching but not reaching pre-pandemic levels.

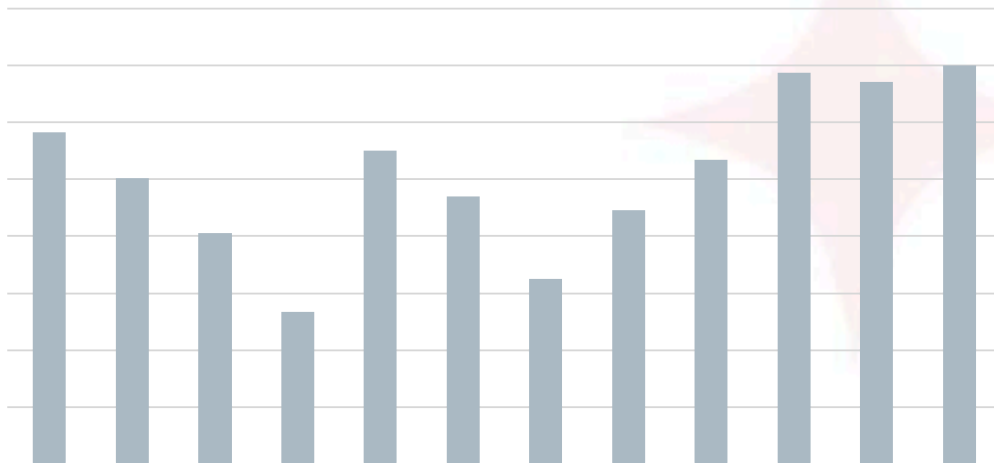
Figure 94. Maximum hotel Occupancy in Martinique 2011-2023



Source: Own elaboration based on data of INSS<sup>44</sup>

Analysing the average monthly occupation during 2011-2023 it is observed a **remarkable seasonality** in Martinique's characterized by clear peaks during the last quarter (October–December) and the lowest demand during the months of April and July. Historically the month with the highest occupancy rate is December, followed by October.

Figure 95. Averaged Monthly hotel Occupancy in Martinique 2011-2023



Source: Own elaboration based on data of INSS<sup>44</sup>

INSEE also provides relevant data regarding the age, motivations and habits of tourists and the length of their stays.

More than half (52.5%) of visiting tourists are between 35 and 54 years old (compared to 50.6% in 2022). The **average age** of accommodated visitors is **42 years**, two years younger than in 2022. The average household income of these visitors reaches €4,100 (€3,900 in 2022). Executives and professionals, including artisans and merchants, account for 24.5% of tourists (down from 26.9% in 2022). Salaried workers remain the largest group among accommodated tourists, representing 30.2% of visitors for the year, although they are no longer the majority (50.8% in 2022).

In 2023, 41.5% of visiting tourists discovered Martinique for the first time during their trip. The **average length of stay** increased to **15.0 days** in 2023 (up from 11.5 days in 2022 and 11.0 days in 2019). On average, tourists visiting Martinique **travel in groups of 2.7 people** (compared to 2.0 people in 2022). For **91.5%** of these visitors, the primary purpose of their trip to Martinique is **leisure** (up from 86.0% in 2022 and 82.6% in 2019). Additionally, 76.1% highly value the quality of the beaches, while 52.0% share the same appreciation for excursions, representing a significant increase from 2022 (26.9%).

### 9.5.8.3 Infrastructural Offer (Hotel Facilities).

#### The Canary Islands

According to the latest data published by the Canary Islands Tourism Observatory, in terms of installed hotel capacity, the Canary Islands offer 509,424 rooms, of which 32% are located on the island of Gran Canaria (161,170 rooms), a number similar to the island of Tenerife (172,032 rooms), with Lanzarote with 15% (78,386 rooms) and Fuerteventura with 14% (71,521 rooms) being the islands that occupy the third and fourth position respectively. Therefore, the province of Las Palmas represents 61% of the archipelago's hotel capacity (Table 75).

Table 75. Hotel capacity in the Canary Islands. Summary by Islands and Provinces

Island / Province	Rooms	% s/total
Gran Canaria	161,170	32%
Lanzarote	78,386	15%
Fuerteventura	71,521	14%
<b>Subtotal Las Palmas</b>	<b>311,077</b>	<b>61%</b>
Tenerife	172,032	34%
La Palma	15,112	3%
La Gomera	8,874	2%
El Hierro	2,329	0%
<b>Subtotal Tenerife</b>	<b>198,347</b>	<b>39%</b>
<b>Total the Canary Islands</b>	<b>509,424</b>	<b>100%</b>

Fuente: Elaboración propia con datos del Observatorio Turístico de Canarias

These hotel capacity data are aligned with those of the floating population that we have indicated in previous sections, with a detailed breakdown by type of accommodation in the following table.

Table 76. Capacity Hotels of the Canary Islands. Detailed breakdown by categories

Isla	Modality	Category	Beds	Beds per Island	% Total per island		
El Hierro	Other (not hotels)	Unique category	1,287	2,329	55.26		
		*****	4	2,329	0.17		
		***	26	2,329	1.12		
		1 key	425	2,329	18.25		
		2 keys	140	2,329	6.01		
		4 keys	4	2,329	0.17		
			60	2,329	2.58		
	Hotels	**	155	2,329	6.66		
		***	128	2,329	5.50		
		One star	100	2,329	4.29		
		<b>Total Beds/Island:</b>		<b>2,329</b>	<b>100,00</b>		
	Fuerteventura	Other (not hotels)	Unique category	13,622	71,521	19.05	
			****	2,312	71,521	3.23	
			***	8,061	71,521	11.27	
*** provisional			182	71,521	0.25		
1 key			4,149	71,521	5.80		
2 keys			9,693	71,521	13.55		
			15	71,521	0.02		
Hotels		*****	876	71,521	1.22		
		***** Grand Luxury	502	71,521	0.70		
		****	25,745	71,521	36.00		
		**** provisional	618	71,521	0.86		
		**	256	71,521	0.36		
		***	4,629	71,521	6.47		
		One star	142	71,521	0.20		
		2 palm trees	65	71,521	0.09		
		5 - stars luxury	654	71,521	0.91		
		<b>Total Beds/Island:</b>		<b>71,521</b>	<b>100,00</b>		
		Gran Canaria	Other (not hotels)	Unique category	25,842	161,170	16.03
				*****	51	161,170	0.03
				***** provisional	26	161,170	0.02
****	937			161,170	0.58		
***	11,816			161,170	7.33		
*** provisional	445			161,170	0.28		
1 key	26,306			161,170	16.32		
2 keys	31,615			161,170	19.62		

Isla	Modality	Category	Beds	Beds per Island	% Total per island	
	Hotels		337	161,170	0.21	
		Unique category	201	161,170	0.12	
		*****	8,650	161,170	5.37	
		***** Grand Luxury	181	161,170	0.11	
		***** Grand Luxury provisional	408	161,170	0.25	
		***** provisional	845	161,170	0.52	
		****	30,504	161,170	18.93	
		**** provisional	1,287	161,170	0.80	
		**	1,876	161,170	1.16	
		***	17,587	161,170	10.91	
		*** provisional	1,186	161,170	0.74	
		One star	860	161,170	0.53	
		One star provisional	57	161,170	0.04	
		1 palm tree	60	161,170	0.04	
		2 palm trees	93	161,170	0.06	
		<b>Total Beds/Island:</b>			<b>161,170</b>	<b>100,00</b>
La Gómera	Other hotels) (not	Unique category	2,581	8,874	29.08	
		***	439	8,874	4.95	
		1 key	2,316	8,874	26.10	
		2 keys	1,057	8,874	11.91	
			407	8,874	4.59	
	Hotels	Unique category	17	8,874	0.19	
		****	1,168	8,874	13.16	
		**	244	8,874	2.75	
		***	265	8,874	2.99	
		One star	264	8,874	2.97	
		1 palm tree	100	8,874	1.13	
		2 palm trees	16	8,874	0.18	
		<b>Total Beds/Island:</b>			<b>8,874</b>	<b>100,00</b>
	La Palma	Other hotels) (not	Unique category	4,941	15,112	32.70
			***	2,106	15,112	13.94
			1 key	1,611	15,112	10.66
2 keys			1,318	15,112	8.72	
			1,222	15,112	8.09	
Hotels		Unique category	102	15,112	0.67	
		****	2,962	15,112	19.60	



Isla	Modality	Category	Beds	Beds per Island	% Total per island
		**	139	15,112	0.92
		***	513	15,112	3.39
		One star	191	15,112	1.26
		1 palm tree	7	15,112	0.05
		<b>Total Beds/Island:</b>	<b>15,112</b>	<b>100,00</b>	
<b>Lanzarote</b>	Other hotels) (not hotels)	Unique category	10,420	78,386	13.29
		Unique category provisional	126	78,386	0.16
		****	1,494	78,386	1.91
		**** provisional	168	78,386	0.21
		***	11,738	78,386	14.97
		*** provisional	99	78,386	0.13
		1 key	4,753	78,386	6.06
		2 keys	16,728	78,386	21.34
			311	78,386	0.40
	Hotels	Unique category	74	78,386	0.09
		*****	2,279	78,386	2.91
		***** provisional	818	78,386	1.04
		****	20,352	78,386	25.96
		**** provisional	444	78,386	0.57
		**	90	78,386	0.11
		***	6,036	78,386	7.70
		One star	597	78,386	0.76
		2 palm trees	94	78,386	0.12
		5 - stars luxury	1,765	78,386	2.25
		<b>Total Beds/Island:</b>	<b>78,386</b>	<b>100,00</b>	
<b>Tenerife</b>	Other hotels) (not hotels)	Unique category	33,299	172,032	19.36
		*****	1,000	172,032	0.58
		****	2,105	172,032	1.22
		**** provisional	281	172,032	0.16
		***	25,328	172,032	14.72
		*** provisional	706	172,032	0.41
		1 key	6,989	172,032	4.06
		2 keys	12,226	172,032	7.11
			635	172,032	0.37
	Hotels	Unique category	102	172,032	0.06
		*****	8,825	172,032	5.13
		***** Grand Luxury	4,977	172,032	2.89

Isla	Modality	Category	Beds	Beds per Island	% Total per island
		***** Grand Luxury provisional	962	172,032	0.56
		***** provisional	582	172,032	0.34
		****	50,686	172,032	29.46
		**** provisional	2,397	172,032	1.39
		**	2,053	172,032	1.19
		** provisional	19	172,032	0.01
		***	16,145	172,032	9.38
		*** provisional	674	172,032	0.39
		One star	1,200	172,032	0.70
		1 palm tree	173	172,032	0.10
		2 palm trees	338	172,032	0.20
		5 - stars luxury	330	172,032	0.19
		<b>Total Beds/Island:</b>		<b>172,032</b>	<b>100,00</b>
		<b>Total the Canary Islands:</b>		<b>509,424</b>	

Fuente: Oen elaboration with data from Observatorio Turístico de Canarias

### Madeira

In 2023, Madeira had a total of **440 tourist accommodations**, comprising **17,405 rooms** and an accommodation capacity of **38,930 beds**, served by **8,145 employees**. This figure includes all categories of accommodations, from hotels to local lodging, demonstrating Madeira's robust tourism infrastructure.

**Hotels** represent the largest segment of tourist accommodations in Madeira, with **138 establishments** (31.4% of the total), providing 14,556 rooms and an accommodation capacity of 32,668 beds. This category employs 7,175 workers, making it the most significant contributor to the island's tourism employment. The breakdown by Star Rating is as follows:

- 5-star hotels: 17 establishments (12.3% of hotels) with 3,788 rooms and a capacity of 9,020 beds, employing 2,370 staff.
- 4-star hotels: 45 establishments (32.6% of hotels) with 5,489 rooms and a capacity of 11,822 beds, employing 2,781 staff.
- 3-star hotels: 18 establishments (13.0% of hotels) with 949 rooms and a capacity of 2,067 beds, employing 358 staff.
- 2-star hotels: 8 establishments (5.8% of hotels) with 193 rooms and a capacity of 402 beds, employing 85 staff.
- 1-star hotels: 2 establishments (1.4% of hotels) with 34 rooms and a capacity of 66 beds, employing 3 staff.

There are **28 aparthotels** (6.4% of total accommodations), offering 3,091 rooms and a capacity of 7,177 beds, employing 1,120 staff. The breakdown is shown below:

- 5-star aparthotels: 1 establishment (3.6% of aparthotels) with 174 rooms, 388 beds, and 133 employees.
- 4-star aparthotels: 20 establishments (71.4% of aparthotels) with 2,276 rooms, 5,378 beds, and 810 employees.
- 3-star aparthotels: 7 establishments (25% of aparthotels) with 641 rooms, 1,411 beds, and 177 employees.

Madeira has **10 tourist apartment** establishments (2.3% of total accommodations), comprising 339 rooms, an accommodation capacity of 728 beds, and 59 employees. This is the breakdown:

- 5-star tourist apartments: 1 establishment (10% of apartments) with 19 rooms, 38 beds, and 13 employees.
- 4-star tourist apartments: 3 establishments (30% of apartments) with 160 rooms, 336 beds, and 20 employees.
- 3-star tourist apartments: 6 establishments (60% of apartments) with 160 rooms, 354 beds, and 25 employees.

There is 1 **tourist village** (0.2% of total accommodations), classified as 4-star, providing 213 rooms, a capacity of 438 beds, and 32 employees.

**Pousadas and Quintas da Madeira** includes **9 establishments** (2.0% of the total), offering 459 rooms and a capacity of 947 beds, employing 367 staff.

**Rural and housing tourism** consists of **63 establishments** (14.3% of total accommodations), with 570 rooms, a capacity of 1,255 beds, and 343 employees.

**Local lodging** accounts for **239 establishments** (54.3% of total accommodations), with 2,279 rooms, a capacity of 5,007 beds, and 627 employees. This category includes accommodations with more than 10 beds, highlighting its significant contribution to Madeira's tourism landscape.

Table 77. Capacity Hotels of Madeira. Detailed report by categories

Category	Establishments	Rooms	Accommodation Capacity	Staff at Service
<b>HOSPITALITY INDUSTRY</b>	<b>138</b>	<b>14,556</b>	<b>32,668</b>	<b>7,175</b>
<b>Hotels</b>	<b>90</b>	<b>10,454</b>	<b>23,378</b>	<b>5,597</b>
*****	17	3,788	9,020	2,370
****	45	5,489	11,822	2,781
***	18	949	2,067	358

Category	Establishments	Rooms	Accommodation Capacity	Staff at Service
**	8	193	402	85
*	2	34	66	3
<b>Aparthotels</b>	<b>28</b>	<b>3,091</b>	<b>7,177</b>	<b>1,120</b>
*****	1	174	388	133
****	20	2,276	5,378	810
***	7	641	1,411	177
<b>Tourist apartments</b>	<b>10</b>	<b>339</b>	<b>728</b>	<b>59</b>
*****	1	19	38	13
****	3	160	336	20
***	6	160	354	25
<b>Tourist villages</b>	<b>1</b>	<b>213</b>	<b>438</b>	<b>32</b>
****	1	213	438	32
<b>Pousadas e Quintas da Madeira</b>	<b>9</b>	<b>459</b>	<b>947</b>	<b>367</b>
<b>TOURISM IN RURAL AREAS AND HOUSING</b>	<b>63</b>	<b>570</b>	<b>1,255</b>	<b>343</b>
<b>LOCAL ACCOMMODATION (excluding properties with a capacity of fewer than 10 beds)</b>	<b>239</b>	<b>2,279</b>	<b>5,007</b>	<b>627</b>
<b>TOTAL TOURIST ACCOMMODATION (excluding those with a capacity of fewer than 10 beds)</b>	<b>440</b>	<b>17,405</b>	<b>38,930</b>	<b>8,145</b>

Source: DREM, Survey on the stay of guests in hotels and other accommodations (IPHH)<sup>45</sup>.

### Azores

In accordance with the Dashboard Desempenho Turístico Regional of OTA<sup>46</sup> in 2023, the total accommodation capacity across the Azores increased to **3,217 beds**, reflecting a **5.93% growth** compared to the 3,037 beds available in 2022. Among the categories, hotels experienced a 5.40% growth, rising from 1,092 beds in 2022 to 1,151 beds in 2023, maintaining their significant role in the region's infrastructure.

**Alojamiento Local** (local accommodations) showed the highest absolute increase, growing from **1,895 beds** in 2022 to **2,012 beds** in 2023, with a growth rate of **6.17%**, highlighting its rising importance as a flexible and popular option among visitors. Meanwhile, **Colonias de**

<sup>45</sup> Direcao Regional de Estatística de Madeira (DREM), Survey on the stay of guests in hotels and other accommodations (IPHH)  
<https://estatistica.madeira.gov.pt/en/download-now-3/economic/turismo-gb/turismo-publicacoes-gb/category/40-turismo-publicacoes.html>

<sup>46</sup> Data available on line at <https://otacores.com/estatistica/dashboard-desempenho-turistico-regional/>

**Ferías** (holiday camps) grew modestly by **8.00%**, from **50 beds** in 2022 to **54 beds** in 2023, remaining a niche category. This distribution underscores the expanding capacity in local accommodations, which now account for **62.5%** of the total, compared to hotels at **35.8%**, reflecting a shift in visitor preferences and the diversity of lodging options available in the Azores.

Table 78. Capacity of accommodation by category. Azores as of December of 2022 and 2023.

Category of accommodation	2022	2023	% Growth
Hotels	1,092	1,151	5.4%
Alojamiento Local (local accommodations)	1,895	2,012	6.2%
Colonias de Ferias (holiday camps)	50	54	8.0%
<b>Total</b>	<b>3,037</b>	<b>3,217</b>	<b>5.9%</b>

Source: Dashboard Desempenho Turístico Regional of OTA<sup>46</sup>

Using the same database above of OCA it is observed that in 2023 the distribution of accommodation capacity across the Azores shows a clear dominance by São Miguel, which accounts for 59.1% of the total capacity. Terceira follows with 18.4%, while Faial and Pico contribute 7.2% and 5.5%, respectively. The smaller islands, including São Jorge (3.3%), Santa Maria (3.0%), Graciosa (1.6%), and Flores (1.6%), provide more limited capacity. Corvo, the smallest island, represents only 0.3% of the total. This distribution highlights São Miguel's centrality in the region's tourism infrastructure, with Terceira and Faial serving as secondary hubs.

Currently, there are no official statistics available either from the SREA, OTA, Portal do Turismo dos Açores or other regional tourism authorities that provide a detailed breakdown of hotels by category (e.g., star ratings). As a result, it is not possible to conduct a direct comparison between the Azores and other regions such as Madeira or the Canary Islands, for which detailed data on hotel classifications have been presented earlier. This limitation highlights a gap in the available data, restricting the ability to analyse and benchmark the Azores hotel infrastructure in relation to these comparable tourism destinations.

### Martinique

Hotels and vacation resorts together attract **20.6%** of overnight tourists in Martinique, highlighting their continued relevance, albeit less dominant than private accommodations. Hotels alone account for **14.3%**, while vacation resorts contribute **6.3%** of the lodging distribution. Other types of accommodations, including niche or specialized options, represent a smaller **4.3%** of the total.

Table 79. Breakdown of accommodation per type. Martinique

Accommodation Type	Tourist Distribution (%)
Residences, apartments, and rented villas	51.6
Friends/Relatives	23.5
Hotels	14.3

Vacation resorts	6.3
Others	4.3
Total	100

Source: INSS

Despite an intensive search, no official statistics have been found in Martinique regarding the type of hotel accommodations or their categorization, such as the number of stars. This lack of detailed data limits the ability to analyse the diversity and quality of accommodations available on the island.

#### 9.5.8.4 Market Operators and Service Offer.

**Tourism market operators** play a crucial role in shaping the travel experience in the Region. These destinations are characterized by for their stunning natural beauty, warm climates, and unique cultural heritage. Operators in these markets act as **intermediaries between travellers and service providers**, offering tailored packages that include accommodations, transportation, guided tours, and other essential services. Their expertise ensures that visitors can enjoy a seamless and enriching experience, while also benefiting local economies through job creation and the promotion of local businesses.

The tourism market in these regions is segmented into two primary groups: large international operators and specialized local providers. **International operators** offer comprehensive travel packages that connect these destinations to a global network of travellers, ensuring seamless experiences that often include flights, accommodations, and guided tours. On the other hand, **local operators** bring an in-depth understanding of their specific regions, tailoring their offerings to highlight unique cultural, natural, and historical aspects. This dual structure ensures a wide range of options for travellers, from standardized packages for global audiences to personalized experiences that showcase the distinct charm of each destination.

A growing trend in the tourism market is the preference among visitors **to design their own travel experiences** by independently booking flights, accommodations, and activities through online reservation platforms. This shift empowers travellers with greater flexibility and customization, often bypassing traditional package deals offered by tour operators. As a result, the tourism industry faces increased competition on globalized platforms like Booking.com, Expedia, and Airbnb, where convenience and transparency drive consumer choice. To remain competitive, service providers must strengthen their presence on these intermediaries, leveraging advanced digital tools, competitive pricing strategies, and engaging content to attract tech-savvy travellers. Adapting to this trend is essential for ensuring visibility and relevance in an increasingly digital marketplace.

The **range of services provided by tourism operators** in these regions is diverse and often customized to meet the needs of various traveller profiles. In all these regions operators offer services ranging such as luxury resort stays, adventure excursions in volcanic landscapes, activities marine and coastal oriented activities, lush greenery and wine culture, hiking, and cultural festivals (i.e, Carnivals in the Canary Island), eco-conscious travellers activities such a whale-watching trips, geothermal spa visits, and sustainable tourism initiatives, stunning beaches, heritage tours, culinary experiences, and water sports activities.



Across these destinations, operators **collaborate closely with local communities** to showcase the unique characteristics of each region while maintaining sustainable tourism practices.

Some samples of Tour Operators in each region are shown below:

- In the **Canary Islands**, several prominent tour operators have a significant presence in the media and the market. Companies like TUI, Thomas Cook, My Travel, JMC, First Choice, Rebel, and Altus play a crucial role in shaping tourism in the region. Additionally, national operators such as Iberojet, Marsans, Soltour, El Corte Inglés, Globalia (Halcón Viajes), and Vacaciones (Spanair) have also established themselves as key players in the Canary Islands tourism sector.
- In **Madeira** companies such as Eurohike, G Adventures, and Explore! are well-known for organizing hiking and trekking circuits on the island, offering experiences that range from self-guided walks to expert-led tours by local guides. Additionally, local agencies like Intertours, with over four decades of experience, provide personalized travel solutions for individuals, groups, and businesses, covering everything from airfare and accommodations to complete tour packages and cruises.
- In the **Azores** operators such as Portugal Travel Center, Destination Services Portugal, G Adventures, Wingbuddy, and Futurismo Azores Adventures are notable for organizing comprehensive tours across the archipelago. These operators provide experiences ranging from cultural explorations and hiking adventures to wildlife observation, including whale and dolphin watching, which the Azores are renowned for. Additionally, local agencies like Futurismo Azores Adventures specialize in active adventures, wildlife tours, and hiking experiences, offering both guided and self-guided options to accommodate different preferences.
- In **Martinique**, companies such as ALMA Voyages, Cœur des Îles, and Voyager Vrai are notable for organizing comprehensive tours across the island. These operators provide experiences ranging from cultural explorations and historical tours to adventure activities and beach excursions, ensuring that visitors can fully immerse themselves in the rich heritage and natural beauty of Martinique. Additionally, platforms like tourHQ, ToursByLocals and La Pirogue Kalina connect travellers with private local guides, offering personalized and customizable tours that highlight the island's unique attractions and hidden gems.

The tourism operator **market is highly fragmented and remarkably diverse in its range of specialties**, reflecting the wide variety of traveller preferences and regional offerings. Operators range from large-scale international companies providing all-inclusive packages to small, niche providers focused on unique cultural, adventure, or eco-tourism experiences. This vast diversity makes it impractical to compile an exhaustive list of all operators, as each destination is served by countless entities catering to different segments of the market. Instead, the industry's strength lies in its ability to offer tailored solutions that meet the varied needs of travellers, while continuing to innovate and adapt to changing demands.

#### **9.5.8.5 Combination with other leisure activities apart from marine and coastal tourism**

Activities related to the marine environment and the coast can be seamlessly combined with a wide range of leisure activities available in the Region, creating synergies for tour operators and service providers. This integration offers an opportunity to enhance the appeal of the destination through coordinated efforts among local stakeholders. In the future, the collaboration between these agents to develop combined commercial offers could become a key focus, allowing them to share logistical and marketing costs while providing a more diverse and attractive experience for visitors.

A non-exhaustive list of the most popular experiences in the Region are the following:

- **Volcanism and Geotourism:** Explore geological wonders related to volcanic activity, such as Teide National Park in the Canary Islands, Sete Cidades Crater in Sao Miguel Island and the Capelinhos vulcano in Faial Island both in the Azores, or Mount Pelée in Martinique.
- **Birdwatching:** Enjoy observing diverse bird species, including the Madeiran storm-petrel in Madeira or the endemic Azores bullfinch.
- **Caving:** Discover caves like Gruta das Torres in the Azores or volcanic tunnels in Lanzarote, the Canary Islands.
- **Wildlife Spotting:** Observe fauna such as the green monkeys of Martinique or unique lizard species in the Canary Islands.
- **Hiking:** Embark on trails like the Levada walks in Madeira, the Caldeira trail in the Azores, or the Anaga mountains in Tenerife.
- **Culinary Experiences:** Participate in food tours and cooking classes featuring dishes like "mojo" sauce in the Canary Islands, Creole cuisine in Martinique, or bolo do caco in Madeira.
- **Wine Tourism:** Enjoy wine tastings at volcanic vineyards in Lanzarote, Madeira wine tours, or local wineries in Pico, Azores.
- **Rum Distilleries and Cocktails:** Visit distilleries like Rhum J.M in Martinique or enjoy cocktails featuring Madeiran sugarcane rum.
- **Adventure Tourism:** Engage in activities like paragliding in Tenerife, canyoning in Madeira, or kayaking in Martinique's mangroves.
- **Nature Parks and Botanical Gardens:** Nature Parks and Botanical Gardens in these regions offer a wealth of breathtaking landscapes and protected areas to explore. In

Madeira, highlights include the Monte Palace Tropical Garden, the Laurisilva Forest (a UNESCO World Heritage Site), Ribeiro Frio Natural Park, and the Madeira Botanical Garden. The Canary Islands boast iconic spots such as Parque Nacional del Teide in Tenerife, Parque Nacional de Garajonay in La Gomera, Timanfaya National Park in Lanzarote, Caldera de Taburiente in La Palma, and Jandía Natural Park in Fuerteventura. The Azores are home to stunning locations like the Furnas Valley and Sete Cidades Crater Lake in São Miguel, the Pico Island Vineyard Culture Landscape (a UNESCO World Heritage Site), and the Faial Botanical Garden. In Martinique, must-visit sites include the Jardin de Balata, the Caravelle Peninsula Nature Reserve, the Mount Pelée Nature Reserve, and Les Salines Natural Reserve, offering a mix of lush tropical flora and diverse ecosystems.

- **Theme Parks:** Enjoy attractions like Siam Park or Loro Parque in the Canary Islands.
- **Historical Towns:** Explore villages like La Laguna in Tenerife (the Canary Islands), Funchal in Madeira, Angra do Heroísmo in the Azores, or Saint-Pierre in Martinique, once called "the Paris of the Caribbean" before the Mount Pelée eruption.
- **Aerial Tours:** Experience rides in paragliders over Tenerife, helicopter tours in Madeira, or ultralight flights over volcanic craters in the Azores.
- **Local Crafts Fairs and Festivals:** Attend events like the Carnivals in the Canary Island, Madeira Flower Festival, or Martinique's La Fête des Cuisinières.
- **Concerts and Cultural Events:** Enjoy live music and cultural performances at venues across the islands, such as the Madeira Classical Orchestra or traditional Creole dances in Martinique.
- **Events and Conferences:** Participate in professional gatherings in most of the Islands.
- **Activities for Specific Groups:** Tailored experiences like LGBTI, cruises in the Canary Islands, eco-tours for naturalists in the Azores, or motor sports events in Madeira.
- **Land-Based Sports Competitions:** Join or spectate marathons, cycling races, triathlons, and other sporting events.

### 9.5.9 The blue Flag Program

The **Blue Flag Program** is an international initiative created in 1985 by the Foundation for Environmental Education (**FEE**) with the aim of promoting sustainability in the tourism sector through environmental education, environmental protection, and the implementation of responsible practices. This award is granted annually to **beaches, marinas, and tourist vessels** that meet a series of strict criteria in different areas.



This program was originally launched in France and expanded across Europe in 1987. Today, more than 50 countries on five continents participate in this initiative, which is supported by United Nations agencies, such as the World Tourism Organization (UNWTO) and the United Nations Environment Programme (UNEP).

This award aims to educate for sustainable development in coastal, river, and lake beaches, marinas, recreational ports, and eco-tourism and recreational vessels that apply and meet a set of criteria related to Environmental Information and Education, Bathing Water Quality, Environmental Management, Safety and Services, Social Responsibility, and Community Involvement.

The Blue Flag is a symbol of quality that distinguishes the efforts of various entities in enabling the coexistence of local development alongside environmental respect, raising awareness among citizens in general and decision-makers in particular about the need to protect the marine, coastal, and freshwater environments.

The right to hoist and maintain the Blue Flag by beach, marina, and vessel owners/operators/managers means that it has recognized, at the time of awarding, compliance with a series of strict environmental, educational, safety, and accessibility criteria. After receiving the award, the respective owners/operators/managers assume the responsibility of continuously ensuring compliance with all the underlying criteria.

Table 80. The Blue Flag Program. Criteria

Category	Description
<b>Bathing Areas</b>	<p>To receive the Blue Flag, a beach must satisfy criteria grouped into four main categories:</p> <ul style="list-style-type: none"> <li>– Water Quality: Ensuring that bathing waters are safe and meet high-quality standards.</li> <li>– Environmental Information and Education: Providing information about local ecosystems and conducting educational activities to raise environmental awareness.</li> <li>– Environmental Management: Implementing measures for the proper management and conservation of the beach environment.</li> <li>– Safety and Services: Ensuring the presence of basic services and safety measures for visitors.</li> </ul>

Category	Description
<b>Recreational Ports and Marinas</b>	<p>Marinas that aspire to the Blue Flag distinction must meet specific criteria, including:</p> <ul style="list-style-type: none"> <li>– Environmental Education and Information: Installing information boards about the marina and coastal ecosystems, as well as organizing educational activities.</li> <li>– Environmental Management: Developing an environmental policy and an action plan that promote sustainable practices.</li> <li>– Safety and Services: Providing safe and high-quality facilities for users and vessels.</li> </ul>
<b>Boats</b>	<p>The program also recognizes tourist vessels that operate under sustainable policies and are committed to environmental education and protection. The criteria for these vessels cover areas such as environmental management, education and information, safety and services, social responsibility, and responsible wildlife interaction.</p> <p>This recognition applies to various activities, including birdwatching, recreational diving, and fishing tourism and specific criteria apply to vessels for Bird Watching, Cage Diving, Recreational Diving, Recreational Fishing, Seal Watching, and Whale Watching.</p>

Source: *Foundation for Environmental Education*<sup>47</sup>

In Portugal, the Blue Flag Program is promoted by the Associação Bandeira Azul de Ambiente e Educação (ABAAE), the Portuguese section of the Foundation for Environmental Education (FEE), while in Spain is managed and awarded by the Asociación de Educación Ambiental y del Consumidor (ADEAC), which serves as the Spanish branch of the FEE. In the case of Martinique, a French overseas territory, the program is administered by the Office Français de la Fondation pour l'Éducation à l'Environnement en Europe (of-FEEE).

Thanks to the Blue Flag Program, more than 5,000 beaches, marinas, and tourist vessels worldwide actively contribute to sustainable development goals, promoting responsible tourism and environmental conservation. In the territory covered by the report there are 118 beaches, 14 marinas and 11 vessels awarded with Blue Flag.

Table 81. The Blue Flag Program. Awards by category in the Canary Islands, Azores, Madeira and Martinique

Territory	Beaches Awarded	Marinas Awarded	Boats Awarded	Total Awarded
<b>Canary Island</b> <sup>48,49,50</sup>	56	4	0	60
<b>Azores</b> <sup>51</sup>	45	6	4	55
<b>Madeira</b> <sup>51</sup>	17	3	7	27

<sup>47</sup> Available on <https://www.fee.global/>

<sup>48</sup> Number of beaches awarded in the Canary Islands available on <https://www.banderaazul.org/sites/default/files/archivos/rueda-de-prensa/2024/RELACION%20DE%20PUESTOS%20GALARDONADOS%202024.pdf>

<sup>49</sup> Number of marinas awarded in the Canary Islands Available on <https://www.banderaazul.org/sites/default/files/archivos/rueda-de-prensa/2024/RELACION%20DE%20PLAZAS%20GALARDONADAS%202024.pdf>

<sup>50</sup> Number of boats awarded in the Canary Islands Available on <https://www.banderaazul.org/sites/default/files/archivos/rueda-de-prensa/2024/RELACION%20EMBARCACIONES%20TURISTICAS%202024.pdf>

<sup>51</sup> Information of awarded in Portugal available on <https://bandeiraazul.abaee.pt/galardoados/galardoados-2024/>



Territory	Beaches Awarded	Marinas Awarded	Boats Awarded	Total Awarded
<b>Martinique<sup>52</sup></b>	0	1	0	1
	118	14	11	

Source: ABAAE, ADEAC y of-FEEE

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<sup>52</sup> Information available in France on <https://pavillonbleu.org/actus/entree/decouvrez-le-palmares-pavillon-bleu-2024.html>



## 10 STRATEGIC POSITIONING

### 10.1 SWOT ANALYSIS

A SWOT analysis (Strengths, Weaknesses, Opportunities, and Threats) is a strategic tool used to assess the internal and external factors that influence a specific sector or industry. It helps identify key advantages that can be leveraged, challenges that need to be addressed, potential areas for growth, and external risks that may impact development.

In this report, a SWOT analysis is conducted in relation to the development of coastal and marine tourism, structured across four key dimensions:

- Infrastructure and Services (Table 82),
- Sustainability and Alignment with Sustainable Development (Table 83),
- Digital Transformation of the Sectors (Table 84), and
- Human Capital and Staff Training (Table 85).

Each of these dimensions plays a crucial role in shaping the future of coastal and marine tourism in the Region, ensuring its resilience, competitiveness, and alignment with evolving industry standards and environmental considerations.



It is important to highlight that the present SWOT analysis represents an initial approach that incorporates the perspective of the consultant hired to carry out the study, based on their prior knowledge of the sector and the analysis conducted in the first phase of the study. However, it does not necessarily reflect the opinion of individual consortium members or a consensual view among them. Instead, it serves as a preliminary analysis document subject to refinement and future improvement.

### 10.1.1 Infrastructure and Services Dimension

Table 82. SWOT Analysis. Infrastructures and Services Dimension

 <b>WEAKNESSES</b>	 <b>THREATS</b>
<ol style="list-style-type: none"> <li>1. Outermost position and associated costs</li> <li>2. Fragmentation of the tourism sector and associated difficulties in joint initiatives</li> <li>3. Additional costs due to insularity</li> <li>4. Lower relative income levels compared to their respective nations hinder the growth of activities for the local market</li> <li>5. Difficulty in attracting large cruise ship calls in certain islands</li> <li>6. Lack of significant ship repair services in some islands, hampering the development of specific sectors</li> <li>7. Problems integrating land and maritime transport</li> <li>8. Lack of charging stations for electric ships</li> <li>9. High maintenance costs for coastal port infrastructure due to marine environment aggressiveness</li> <li>10. Challenges in managing maritime traffic (recreational and commercial boating) concerning safety aspects</li> <li>11. Fragmented competencies among different administrations in coastal management, urban planning, and tourism</li> <li>12. Infrastructure inadequately adapted to climate change</li> </ol>	<ol style="list-style-type: none"> <li>1. Emerging position of alternative destinations in West Africa (Macaronesian region)</li> <li>2. Strong regional competition from multiple alternative destinations in the Caribbean (e.g., Martinique)</li> <li>3. High operating costs in certain segments (e.g., chartering)</li> <li>4. High dependence on air transport, which may impact costs and limit sector growth potential</li> <li>5. Competition with other exotic destinations: Maldives, Southeast Asia, etc.</li> <li>6. Economic crises restricting tourism (number of tourists and/or tourist spending)</li> <li>7. Pandemics</li> <li>8. Risk of increased tourism-related taxes and fees</li> <li>9. Infrastructure obsolescence due to difficulties in developing new facilities</li> <li>10. Social opposition to mass tourism</li> </ol>

Table 82. SWOT Analysis. Infrastructures and Services Dimension



 <b>STRENGTHS</b>	 <b>OPPORTUNITIES</b>
<ol style="list-style-type: none"> <li>1. Port infrastructure with international connections to key markets</li> <li>2. Operational hotel facilities adapted to different price ranges and customer profiles</li> <li>3. Strategic Location: Proximity to North American (Martinique) and European Markets (Macaronesia)</li> <li>4. Consolidated tourist offer with long-term tradition</li> <li>5. Internal competition that drives sector competitiveness</li> <li>6. Low initial investment required to start businesses related to the sector</li> <li>7. The region's historical tradition in tourism</li> <li>8. Entrepreneurial culture linked to the tourism sector</li> <li>9. Extensive port infrastructure network</li> <li>10. Exceptional weather conditions for marine tourism development</li> <li>11. Wide range of activities and experiences related to the sea and coast, catering to different customer profiles</li> <li>12. Low seasonality compared to other tourist destinations</li> <li>13. Perceived appropriate pricing</li> <li>14. Diverse tourism offerings: availability and range of prices and quality levels</li> <li>15. The destination is perceived as safe and stable</li> <li>16. Efficient inter-island connections and adequate terminals for such travel</li> <li>17. Support infrastructure network (museums, interpretation centers, eco-tourism, etc.)</li> <li>18. Professional and diversified tourism services</li> </ol>	<ol style="list-style-type: none"> <li>1. Availability of European funds for infrastructure and service development</li> <li>2. Existence of complementary and synergistic tourism offerings beyond coastal and marine activities</li> <li>3. Development of bundled tourism packages combining coastal/marine tourism with other activities</li> <li>4. Active industry associations and business organizations in social and institutional settings</li> <li>5. Strong growth in the cruise sector</li> <li>6. Increasing youth tourism, with a focus on nature, sports, and adventure activities</li> <li>7. Growth in sports tourism and leisure/marine tourism variants related to this sector</li> <li>8. Expansion of adventure tourism and leisure/marine tourism variants in this domain</li> <li>9. Positioning in the emerging megayacht market</li> <li>10. Sports competitions associated with the coast and marine environment</li> <li>11. Small size and limitations of certain marinas and yacht ports to attract larger vessels</li> <li>12. Transit and Atlantic crossing market for recreational boating</li> <li>13. Infrastructure for sustainable luxury tourism</li> </ol>

### 10.1.2 Sustainability and alignment with Sustainable Development Goals and 2030 Agenda objectives

Table 83. SWOT Analysis. Sustainability and alignment with SDG and 2030 Agenda objectives

 <b>WEAKNESSES</b>	 <b>THREATS</b>
<ol style="list-style-type: none"> <li>1. Difficulty in physical expansion of marinas and yacht ports due to environmental restrictions</li> <li>2. Pressure on marine ecosystems: Nautical and adventure tourism can negatively impact protected or sensitive areas and species</li> <li>3. Difficulty managing and Pollution from waste and plastics in coastal tourist areas: Need to develop efficient strategies to reduce waste generation on beaches, in ports, and during maritime activities</li> <li>4. Carbon footprint of transportation: Dependence on air and maritime transport with high CO<sub>2</sub> emissions, making it challenging to align with emission reduction targets</li> <li>5. Overexploitation of marine resources: Certain activities, such as sport fishing and diving tourism, may contribute to species and ecosystem degradation</li> <li>6. Challenges in enforcing environmental regulations</li> <li>7. Difficulty integrating clean energy sources into the sector</li> <li>8. Environmental impact of large-scale port and airport infrastructure development</li> <li>9. Low environmental awareness among some tourists and operators</li> <li>10. Coastal and shoreline areas are limited resources subject to competing interests, sometimes conflicting with tourism needs</li> </ol>	<ol style="list-style-type: none"> <li>1. Impact of climate change and vulnerability to extreme weather events (hurricanes and tropical storms) (e.g., Martinique)</li> <li>2. Stricter environmental regulations in EU territories imposing competitiveness barriers</li> <li>3. Risk of ecosystem saturation and degradation: Overexploited tourism areas may suffer biodiversity loss and environmental deterioration</li> <li>4. High economic dependence of these regions on the tourism sector</li> <li>5. Potential shift of tourism activity to alternative coastal uses</li> </ol>

Table 83. SWOT Analysis. Sustainability and alignment with SDG and 2030 Agenda objectives

 <b>STRENGTHS</b>	 <b>OPPORTUNITIES</b>
<ol style="list-style-type: none"> <li>1. Natural wealth of the region.</li> <li>2. High marine biodiversity and unique landscapes (Presence of emblematic species such as sea turtles, cetaceans, and corals, as well as protected marine reserves and volcanic ecosystems that make the tourism offering unique)</li> <li>3. Growing commitment to sustainability (Increase in eco-certifications such as Blue Flag and Biosphere, and conservation projects within the tourism sector)</li> <li>4. Abundance of natural parks and protected areas with tourism appeal (Extensive network of protected natural areas enabling the development of ecotourism and adventure tourism with controlled impact)</li> <li>5. Potential for regenerative and low-impact tourism (Growing interest in blue tourism and initiatives that combine environmental education with sustainable tourism experiences)</li> <li>6. Unique complementary tourism forms with synergistic potential (Agritourism, geotourism, volcanism, astrotourism, birdwatching, etc.)</li> </ol>	<ol style="list-style-type: none"> <li>1. Emerging tourism trends driving nature-based leisure activities</li> <li>2. Institutional support for the development of new forms of sustainable tourism</li> <li>3. Availability of European funds for sustainable tourism development</li> <li>4. Integrated offering of multiple leisure tourism variants linked to the coast and sea</li> <li>5. Greater coordination between public administrations and the private sector: Unified regional sustainability strategy</li> <li>6. Promotion of ecotourism and regenerative tourism (Growing interest in tourism experiences that contribute to marine ecosystem conservation and the regeneration of degraded areas)</li> <li>7. Use of renewable energy in the tourism sector. Onshore Power Supply (OPS) in Ports (supply of electricity to vessels) and Electric boats</li> <li>8. Expansion of sustainable tourism certifications (Increasing demand for tourism operators with certifications such as Blue Flag, Biosphere, or Green Key, enhancing sector competitiveness)</li> <li>9. Development of marine conservation projects funded by tourism (Creation of programs where tourists can participate in activities such as beach cleanups, reef restoration, or species monitoring)</li> <li>10. Integration of circular economy practices in tourism (Use of recycled materials in tourism infrastructure, reduction of plastic use, and waste repurposing in coastal gastronomy).</li> <li>11. Circular economy: Strategies to reuse materials, reduce waste, and optimize resource use in the industry.</li> <li>12. Diversification towards regenerative and sustainable tourism models.</li> <li>13. Positive contribution of the sector to various sustainable development goals and the social impact of valuing these efforts.</li> </ol>

### 10.1.3 Digital Transformation of the sectors

Table 84. SWOT Analysis. Digital Transformation Dimension of the sectors





 <p><b>WEAKNESSES</b></p>	 <p><b>THREATS</b></p>
<ol style="list-style-type: none"> <li>1. Difficulty in digitizing certain activities within the sector.</li> <li>2. Low digitalization of small businesses and local operators.</li> <li>3. Limited use of emerging technologies in the sector (augmented reality, virtual reality, or artificial intelligence to enhance the tourist experience).</li> <li>4. Weak data analysis culture: Lack of Big Data utilization and analytical tools to personalize tourism offerings and improve strategic decision-making.</li> <li>5. Low implementation of IoT and technology in vessels: Limited adoption of smart sensors to enhance safety, sustainability, and maintenance of boats and nautical equipment.</li> <li>6. Limitations in digital connectivity: Some maritime and remote areas may lack reliable internet coverage.</li> <li>7. Resistance to change: Business culture in some tourism operators does not prioritize digital transformation and still relies on manual and traditional processes.</li> </ol>	<ol style="list-style-type: none"> <li>1. Cybersecurity and data protection gap: Risk of cyberattacks or customer data breaches due to insecure IT systems or lack of proper protocols.</li> <li>2. Digital gap compared to other sectors.</li> <li>3. High dependence on global booking platforms and their negotiation power.</li> </ol>



Table 84. SWOT Analysis. Digital Transformation Dimension of the sectors

 <b>STRENGTHS</b>	 <b>OPPORTUNITIES</b>
<ol style="list-style-type: none"> <li>1. Commercialization of products and services through new digital channels</li> <li>2. Remote booking of tourism offerings using digital platforms</li> <li>3. Highly consolidated tourism service aggregation platforms</li> <li>4. Integrated online booking platforms</li> <li>5. Digitalization of maritime tourism services (Platforms enabling real-time booking of activities such as diving, boat excursions, and sport fishing)</li> </ol>	<ol style="list-style-type: none"> <li>1. Availability of specific European funds to drive the sector's digital transformation.</li> <li>2. Utilization of Artificial Intelligence and other emerging technologies in the sector.</li> <li>3. Innovation and modernization of the sector.</li> <li>4. Advanced digital strategies (Automated marketing, influencers, or immersive experiences)</li> <li>5. Optimization of tourism management through technology (Use of smart platforms to manage tourist flows in ports and beaches, enhancing visitor experiences and preventing infrastructure overload)</li> <li>6. Growth of digital experiential tourism (Use of virtual reality and augmented reality to offer immersive complementary experiences about marine life and the history of tourist destinations)</li> <li>7. Implementation of Artificial Intelligence in personalized experiences (Development of virtual assistants that recommend aquatic activities and customized routes based on tourist interests)</li> <li>8. Expansion of IoT for sustainable tourism (Sensors in marinas and beaches to monitor water quality, detect pollution, and optimize resource consumption)</li> <li>9. Application of blockchain in sustainable certifications (Use of blockchain to ensure transparency and traceability of ecological certifications in the tourism sector)</li> <li>10. Data-driven tourism and experience personalization (Increasing use of Big Data and Artificial Intelligence to offer personalized travel packages based on traveler preferences)</li> </ol>

### 10.1.4 Human Capital Dimension and Staff Training

Table 85. Human Capital Dimension and Staff Training





 <p><b>WEAKNESSES</b></p>	 <p><b>THREATS</b></p>
<ol style="list-style-type: none"> <li>1. Lack of specialized training programs in the tourism sector</li> <li>2. Difficulty in attracting human capital due to the challenges of ultra-peripheral location and insularity</li> <li>3. Small and, in some cases, underprofessionalized business structures</li> <li>4. Challenges in training specialized personnel: Shortage of guides and instructors with international certifications in diving, navigation, and sustainable tourism</li> <li>5. Difficulty and high cost of attracting digital talent: Lack of professionals with experience in digital transformation applied to maritime tourism</li> </ol>	<ol style="list-style-type: none"> <li>1. Overregulation and frequent legislative changes making difficult for human capital to adapt to (associated costs, compliance challenges, and lack of awareness in the sector)</li> <li>2. Lack of specialized personnel in certain niche sectors (e.g., chartering)</li> <li>3. Strict environmental regulations</li> <li>4. Difficulties in talent retention and employment seasonality (Many tourism workers hold seasonal jobs, which hinders job stability and long-term skill development)</li> <li>5. Non-Integration of local communities into the tourism industry (Ensuring coastal communities benefit economically through inclusive initiatives)</li> <li>6. Challenges in adapting to new tourism models and uncertainty in transition processes due to a lack of qualified personnel</li> </ol>

Table 85. Human Capital Dimension and Staff Training

	
<ol style="list-style-type: none"> <li>1. High level of multilingualism in the sector (A significant portion of tourism personnel speaks multiple languages—English, French, German, Spanish, Portuguese—facilitating communication with international tourists).</li> <li>2. Well-established tourism culture and hospitality expertise (The islands have decades of experience managing international tourism, with well-prepared operators and high-quality standards).</li> <li>3. Inclusion and equity in tourism development.</li> </ol>	<ol style="list-style-type: none"> <li>1. Availability of specific European funds for training and capacity-building initiatives</li> <li>2. Growing demand for training in sustainable tourism (Increasing interest in educational programs on ecological tourism management, marine biology applied to tourism, and sustainability practices)</li> <li>3. Expansion of employment in emerging blue tourism sectors (Growth of job opportunities in ecotourism, scientific tourism, and activities related to marine ecosystem conservation)</li> <li>4. Implementation of digital training programs in tourism (Development of courses on digital transformation for local tourism operators, improving their competitiveness and global market reach)</li> <li>5. Greater integration of local communities into the tourism industry (Promotion of community-based tourism models where economic benefits are equitably distributed among coastal populations)</li> <li>6. Promotion of female leadership in the tourism sector (Creation of programs to increase women's participation in leadership positions within maritime and sustainable tourism)</li> <li>7. Growth of education in sustainable tourism and digitalization (Universities and specialized centers are expanding their course offerings in ecological tourism and technology applications in the sector)</li> <li>8. Availability of a skilled workforce in tourism and hospitality (A strong supply of professionals trained in tourism, with experience in customer service and tourism activity management due to the sector's long-standing presence in the job market)</li> <li>9. Potential for startup development and digital blue economy (Opportunities for new companies to innovate in sustainable tourism, digitalization, and circular economy in marine environments)</li> <li>10. Employment opportunities for local communities</li> <li>11. Employment opportunities for young people</li> </ol>

## 10.2 ACTION PLAN. CAME ANALYSIS

### 10.2.1 CAME analysis

A **CAME analysis** (Correct, Adapt, Maintain, and Explore) is a strategic planning tool used to develop actionable strategies based on the findings of a SWOT analysis. It serves as a complementary approach by transforming the identified **Weaknesses into areas for improvement (Correct)**, **Threats into challenges to be addressed (Adapt)**, **Strengths into key assets to be maintained (Maintain)**, and **Opportunities into avenues for growth and innovation (Explore)**.

In this report, CAME tables are presented to provide concrete strategies for addressing the insights derived from the SWOT analysis.

These tables outline specific actions aimed at correcting weaknesses, adapting to threats, mitigating risks, and capitalizing on opportunities, ensuring a structured and effective approach to the development of coastal and marine tourism.

It is important to emphasize that the present CAME analysis serves as an initial approach, incorporating the perspective of the consultant hired to conduct the study. This perspective is based on their prior knowledge of the sector and the findings from the first phase of the study. However, it does not necessarily represent the views of individual consortium members or a collectively agreed-upon opinion. Rather, it functions as a preliminary analytical document, open to refinement and future improvement.

#### 10.2.1.1 Actions to Correct Weaknesses

The following table outlines the potential actions that can be implemented to correct the identified weaknesses. These measures aim to address existing challenges, enhance operational efficiency, and strengthen the overall competitiveness of the sector by leveraging strategic improvements and targeted interventions.

Dimension	Weaknesses	Corrective Actions (CAME)
<b>Infrastructure and Services Dimension</b>	Ultrapерipheral position and associated costs	Further development of <b>tax incentives</b> and subsidies to offset logistical costs
	Fragmentation of the tourism sector and difficulty in joint actions	Promote <b>collaboration networks</b> among operators and regional associations
	Additional costs associated with insularity	Offer <b>financial aid programs for tourism</b> businesses to mitigate extra costs
	Lower relative income levels hinder local market activity growth	Create <b>local economic stimulation</b> plans to boost purchasing power

Table 86. Actions to Correct Weaknesses

Dimension	Weaknesses	Corrective Actions (CAME)
	Difficulty in attracting large cruise ship calls in certain islands	<b>Enhance port infrastructure</b> and provide <b>incentives for cruise operators</b>
	Lack of significant ship repair services in some islands, hindering sector growth	<b>Encourage private investment in ship repair facilities</b>
	Poor integration between land and maritime transport	Improve transport infrastructure to ensure <b>seamless connectivity</b>
	Lack of electric boat charging stations	Encourage <b>investment in electric boat</b> charging infrastructure
	High maintenance costs for coastal port infrastructure due to marine aggressiveness	Develop <b>innovative coatings and maintenance technologies</b> for port and coastal structures
	Challenges in managing maritime traffic (recreational and commercial)	Implement <b>smart maritime traffic control</b> systems
	Dispersion of responsibilities among different administrations	<b>Streamline inter-administrative coordination</b> in tourism management
	Infrastructure poorly adapted to climate change	<b>Upgrade infrastructure</b> to withstand climate change impacts
<b>Sustainability and alignment with SDG and 2030 Agenda objective</b>	Difficulty in physical expansion of marinas and sports ports due to environmental restrictions	Advocate for regulatory <b>flexibility ensuring administrative agility in project processing / permitting</b> for sustainable expansion projects
	Pressure on marine ecosystems from nautical and adventure tourism	Implement stricter <b>regulations and monitoring for eco-tourism</b> activities
	Pollution from waste and plastics: Lack of effective reduction strategies	Develop <b>waste management and recycling programs</b> for tourism zones
	High carbon footprint from air and maritime transport	Incentives to promote <b>sustainable aviation and maritime alternatives</b>
	Overexploitation of marine resources (e.g., sport fishing and diving tourism)	Establish <b>sustainable</b> fishing and marine resource <b>management policies</b>
	Challenges in applying environmental regulations	Strengthening environmental <b>oversight and compliance mechanisms</b>
	Difficulty integrating clean energy into the sector	<b>Incentivize the use of renewable energy</b> sources in tourism facilities
	Impact of large-scale port and airport infrastructure projects	Conduct <b>environmental impact assessments</b> and <b>mitigation strategies</b>

Table 86. Actions to Correct Weaknesses

Dimension	Weaknesses	Corrective Actions (CAME)
	Low environmental awareness among some tourists and operators	<b>Enhance eco-awareness campaigns targeted at tourists</b> and businesses in key areas of the islands
	Coastal areas under pressure from competing interests	Establish <b>balanced land-use policies</b> that protect coastal areas
	Difficulty managing waste in coastal tourist areas	Deploy <b>efficient waste collection and treatment systems</b> in tourist areas
<b>Digital Transformation Dimension of the sectors</b>	Difficulty in digitalizing certain sector activities	Launch <b>digitalization assistance programs</b> for tourism SMEs
	Low digitalization among small businesses and local operators	Provide <b>financial and technical support for digital adoption</b> in small businesses
	Limited use of emerging technologies (AR, VR, AI) in tourism	Encourage <b>research and investment in AR, VR, and AI tourism experiences</b>
	Weak data analysis culture: Lack of Big Data usage in tourism strategies	Develop <b>training programs in data analytics</b> for tourism professionals
	Low IoT adoption in vessels: Few smart sensors for safety and maintenance	Promote <b>IoT adoption with subsidies</b> for smart maritime technology
	Limited digital connectivity in maritime and remote areas	<b>Expand broadband infrastructure</b> in key maritime areas
	Resistance to change: Some operators rely on traditional, manual processes	<b>Educate and incentivize operators to transition to digital processes</b>
<b>Human Capital Dimension and Staff Training</b>	Lack of specialized training programs in the tourism sector	Establish <b>specialized training centers</b> and tourism academies
	Difficulty in attracting human capital due to ultraperipherality and insularity	Provide <b>incentives and career programs</b> to attract skilled professionals
	Small and underprofessionalized business structures in some cases	Support <b>business development programs</b> to enhance professionalism
	Shortage of specialized personnel: Lack of guides and instructors with international certifications	Implement <b>scholarship programs and partnerships with international certification bodies</b>
	Difficulty and cost in attracting digital talent in maritime tourism	Create <b>funding schemes to attract digital experts</b> to the tourism sector



### 10.2.1.2 Actions to Address Threats

The following section presents the possible actions that can be taken to address the identified threats. These measures focus on mitigating risks, enhancing resilience, and ensuring long-term sustainability by implementing strategic solutions and proactive interventions

Dimension	Threats	Addressing Measures (CAME)
Infrastructure and Services Dimension	Emerging competition from alternative destinations in West Africa (Macaronesian region)	<b>Differentiation Strategies:</b> Develop <b>unique tourism branding and value-added services</b> to differentiate from competitors.  Institutional <b>Destination Marketing Plans</b> and Participation in <b>Tourism Industry Fairs</b>  <b>Strategic Alliances</b> within Macaronesia key players for <b>Cruise and Megayacht Sector Offerings</b>
	Strong regional competition from multiple Caribbean destinations (e.g., Martinique)	Create <b>strategic alliances</b> with regional destinations for <b>joint tourism promotions.</b>
	High operating costs in certain segments (e.g., chartering)	Optimize operational costs through <b>efficiency programs and technology adoption.</b>
	High dependence on air transport, affecting costs and limiting sector growth	<b>Enhance maritime connectivity</b> with new ferry and cruise routes to reduce air travel dependency.
	Competition with other exotic destinations (Maldives, Southeast Asia, etc.)	<b>Promote the region</b> as a <b>sustainable and exclusive alternative</b> with eco-tourism experiences.
	Economic crises restricting tourism (number of tourists and/or spending)	Develop <b>tourism resilience programs</b> to withstand economic downturns.

	Pandemics impacting tourism flow	Adopt <b>health security certifications</b> and <b>crisis management strategies</b> .
	Risk of increased tourism-related taxes and fees	Advocate for <b>fair taxation policies</b> that <b>maintain</b> the <b>region's competitiveness</b> .
	Infrastructure obsolescence due to difficulties in developing new facilities	Secure European <b>funding</b> and private investments to <b>modernize infrastructure</b> .
	Social opposition to mass tourism	Implement <b>sustainable tourism policies</b> to <b>balance visitor flow and local interests</b> .
<b>Sustainability and alignment with SDG and 2030 Agenda objective</b>	Vulnerability to extreme climate events (hurricanes, tropical storms) (Martinique)	Improve <b>climate resilience infrastructure</b> and <b>develop emergency response plans</b> .
	Impact of climate change	Implement <b>sustainable tourism strategies</b> to mitigate climate change impact.
	Higher environmental requirements in EU territories that impose competitiveness barriers	<b>Lobby for balanced regulatory policies</b> that ensure competitiveness while maintaining sustainability.
	Risk of saturation and ecosystem degradation: Overexploited areas may suffer biodiversity loss and environmental deterioration	Implement carrying capacity regulations and <b>conservation programs for sensitive areas</b> .
	Strong economic dependence on the tourism sector in these regions	Promote <b>economic diversification</b> throughout the blue economy to reduce dependency on tourism alone and gaining <b>synergies among activities</b> .
	Stricter environmental regulations	<b>Monitor and comply</b> with evolving regulations while ensuring <b>business adaptability</b> .
	Extreme climate phenomena and their impact on tourism	Develop <b>climate adaptation strategies</b> and <b>emergency preparedness plans</b> .

<b>Digital Transformation Dimension of the sectors</b>	Cybersecurity and data protection gap: Risk of cyberattacks or customer data leaks due to insecure systems	Strengthen <b>cybersecurity infrastructure</b> and establish strict data protection protocols, while also promoting <b>specialized training programs</b> in cybersecurity for tourism operators. Additionally, develop <b>shared protection services and collaborative security frameworks</b> to enhance resilience against cyber threats across the sector
	Digital gap between tourism and other sectors	Invest in <b>digital transformation initiatives</b> to bridge the technological gap.
	High dependence on global booking platforms and their negotiating power	Encourage <b>local booking platforms and alternative reservation networks.</b>
<b>Human Capital Dimension and Staff Training</b>	Overregulation and frequent legislative changes (costs, compliance difficulties, lack of knowledge)	<b>Advocate for legal stability and simplification of bureaucratic processes.</b>
	Lack of specialized personnel in certain sectors (e.g., chartering)	Invest in <b>specialized training programs and partnerships with educational institutions.</b>
	Strict environmental regulations	Promote environmental best practices and incentives for eco-friendly businesses.
	Difficulties in talent retention and seasonal employment in the sector	Create <b>stable employment programs</b> and promote <b>year-round tourism activities.</b>
	Integration of local communities in the tourism industry	Foster <b>community engagement projects</b> to integrate locals into the tourism economy.
	Challenges in adapting to new tourism models and uncertainty in transition processes due to lack of qualified personnel	Provide <b>upskilling programs and transition pathways</b> for workforce adaptation.

### 10.2.1.3 Actions to Maintain Strength

The following table outlines the key actions to maintain and strengthen the existing strengths of coastal and marine tourism in the region. These measures aim to preserve competitive advantages, enhance service quality, and ensure the long-term sustainability of the sector. By implementing strategic initiatives and continuous improvements, the region can reinforce its position as a leading destination for maritime tourism while adapting to evolving market demands and environmental and digital transformation challenges.

Table 88. Actions to Maintain Strengths

Dimension	Strengths	Maintaining Measures (CAME)
Infrastructure and Services Dimension	Port infrastructure with international connections to key markets	Strengthen <b>promotional strategies emphasizing the region's connectivity</b> advantages.  Strategic management of <b>partnerships with air operators</b> and the implementation of an <b>attractive tariff scheme</b> at regional airports to enhance connectivity and competitiveness
	Operational hotel facilities adapted to different price ranges and customer profiles	Ensure <b>continuous investment in upgrading and maintaining</b> hotel infrastructure to adapt to evolving customer needs.
	Proximity to North American markets (Martinique)	Leverage proximity to North American markets with <b>targeted marketing campaigns</b> and partnerships and <b>customized experiences for North American tourists</b>
	Proximity to European markets (Macaronesia)	Leverage proximity to European markets with <b>targeted marketing campaigns</b> and expand European market outreach through <b>customized experiences for European tourists.</b>
	Internal competition that drives sector competitiveness	Encourage a <b>healthy competitive environment</b> by supporting innovative tourism initiatives.
	Low initial investment required to start tourism-related businesses	<b>Facilitate entrepreneurship by offering financial incentives</b> and business support programs.

Table 88. Actions to Maintain Strengths

Dimension	Strengths	Maintaining Measures (CAME)
	Historical tradition of tourism in the region	<b>Preserve and promote the region's historical tourism heritage</b> through cultural initiatives and events.
	Entrepreneurial culture linked to the tourism sector	Support and enhance <b>entrepreneurial programs tailored for tourism professionals.</b>
	Extensive port infrastructure network	<b>Upgrade and modernize port infrastructure</b> to maintain its global competitiveness.
	Exceptional climate conditions for marine and coastal tourism development	Promote the <b>destination as a year-round tourism option</b> leveraging its exceptional climate.
	Diverse range of activities and experiences related to the sea and coast, catering to different tourist profiles	<b>Enhance and diversify tourism activities</b> catering to various <b>demographic groups and preferences.</b>
	Low seasonality compared to other tourist destinations	Develop <b>seasonal tourism events</b> and <b>specialized promotional campaigns</b> to <b>attract visitors during off-peak periods</b> , including cultural festivals, sports competitions, and wellness retreats
	Perceived fair pricing	Ensure <b>competitive pricing strategies</b> while <b>maintaining high-quality services.</b>
	Wide variety of tourism offerings: availability of diverse pricing and quality levels	Expand <b>dynamic pricing strategies</b> to cater to <b>different market segments</b> and improve accessibility.
	Perception of the region as a safe destination	<b>Reinforce security measures</b> and crisis management protocols to <b>maintain the region's reputation</b> as a safe destination.
	Efficient inter-island connections and well-equipped terminals	<b>Continue investing</b> in improving inter-island transport efficiency and accessibility.

Table 88. Actions to Maintain Strengths

Dimension	Strengths	Maintaining Measures (CAME)
	Network of supporting infrastructure (museums, interpretation centers, eco-tourism facilities)	<b>Enhance the accessibility, preservation, and promotion</b> of cultural and eco-tourism facilities through digitalization, interactive experiences, and increased collaboration with local communities to enrich visitor engagement.
	Professionalized and diversified tourism services	Offer <b>continuous training programs</b> to maintain high service standards in the tourism sector.
	Strategic location and international connectivity (airports well connected to Europe and America)	Enhance <b>international marketing campaigns</b> to strengthen the region's global positioning.
	Favorable year-round climate (mild temperatures and ideal conditions for aquatic activities in all seasons)	Leverage favourable climate conditions to <b>promote year-round tourism activities</b> and reduce seasonality.
	Well-developed tourism infrastructure (hotels, resorts, marinas, and ports compared to other island destinations)	Ensure <b>continuous investment</b> in the maintenance and modernization of tourism facilities.
Sustainability and alignment with SDG and 2030 Agenda objective	Natural wealth and biodiversity of the region	Develop <b>conservation programs</b> to protect and highlight the region's biodiversity.
	Rich marine biodiversity and unique landscapes (presence of emblematic species like marine turtles, cetaceans, coral reefs, and volcanic ecosystems)	Implement <b>marine protection initiatives</b> and responsible <b>tourism guidelines</b> to safeguard fragile ecosystems.
	Growing commitment to sustainability (increase in ecological certifications like Blue Flag, Biosphere, and conservation initiatives in tourism)	Encourage businesses to obtain <b>sustainability certifications</b> and implement <b>eco-friendly practices</b> .
	Abundance of natural parks and protected areas with tourist appeal (a vast network of protected spaces for ecotourism and adventure tourism)	Promote <b>responsible</b> tourism models while promoting this option to balance visitor influx and conservation efforts.
	Potential for regenerative and low-impact tourism (rising interest in blue tourism and initiatives combining environmental education with sustainable tourism experiences)	Foster <b>partnerships with research and conservation organizations</b> to promote regenerative tourism initiatives.



Table 88. Actions to Maintain Strengths

Dimension	Strengths	Maintaining Measures (CAME)
Digital Transformation Dimension of the sectors	Commercialization of tourism products and services through digital channels	Enhance <b>digital marketing campaigns</b> to boost online visibility and direct sales.
	Remote booking of tourism services via digital platforms	<b>Improve the user experience</b> of online booking platforms and expand service offerings.
	Well-established platforms concentrating on tourism offers and services	<b>Continue innovating</b> in tourism aggregators to <b>simplify access to bundled services</b> for travelers.
	Integrated online booking platforms	Develop <b>seamless integration</b> between <b>different online booking systems</b> for better customer experience.
	Digitalization of maritime tourism services (real-time booking platforms for diving, boat excursions, and sport fishing)	Invest in <b>digital transformation initiatives</b> to optimize maritime tourism services and real-time bookings.
Human Capital Dimension and Staff Training	Commitment to inclusion and equity in tourism development	<b>Promote policies ensuring equitable access</b> to tourism development opportunities for all stakeholders.
	High level of multilingualism in the sector (tourism personnel fluent in English, French, German, Spanish, Portuguese, and more)	Expand <b>language training programs</b> for tourism staff to maintain a high level of multilingual service.
	Established tourism culture and extensive hospitality experience	<b>Preserve and celebrate local tourism traditions</b> while enhancing service quality through professional development programs.

#### 10.2.1.4 Actions to Exploit Opportunities

The following table presents key actions to capitalize on identified opportunities in coastal and marine tourism. These measures aim to enhance the region's competitive advantages, attract new market segments, and drive sustainable growth. By leveraging emerging trends, technological advancements, and strategic partnerships, the region can further strengthen its position as a premier tourism destination while ensuring long-term economic and environmental sustainability.

Dimension	Opportunities	Exploiting Measures (CAME)
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<b>Infrastructure and Services Dimension</b>	Availability of European funds for infrastructure and service development	<b>Leverage EU funding</b> to enhance sustainable infrastructure projects and tourism services.
	Existence of complementary and synergistic tourism offerings linked to coastal and marine tourism	Create <b>integrated tourism experiences</b> that combine marine, cultural, and adventure tourism.
	Organization of complementary tourism packages combining marine, beach, and other activities	Establish <b>partnerships to offer multi-experience tourism packages</b> that blend marine and land-based tourism.
	Active industry associations supporting social and institutional tourism initiatives	<b>Strengthen the role of industry associations</b> in advocating for policies that support sustainable tourism growth.
	Significant growth in the cruise sector	Invest in <b>modernizing and expanding cruise port facilities</b> to attract new cruise routes.
	Increase in youth tourism focused on nature, sports, and adventure activities	Develop <b>targeted youth tourism programs</b> that promote outdoor sports and nature activities.
	Growth of sports tourism and leisure/marine tourism variants	Improve <b>infrastructure and event organization to support the expansion</b> of sports tourism.
	Expansion of adventure tourism and coastal/marine leisure tourism	Promote <b>adventure and high-adrenaline tourism activities</b> to attract thrill-seekers.
	Positioning in the emerging megayacht market	Invest in <b>high-end marina facilities</b> to attract the megayacht sector and luxury travelers.
	Increase in sporting events linked to coastal and marine environments	Expand <b>sporting events that integrate</b> water sports, sailing, and beach competitions.
	Optimization of small marinas and port facilities to attract larger vessels	<b>Upgrade small marina facilities</b> to accommodate growing demand for premium boating experiences.
	Development of luxury sustainable tourism infrastructure	Enhance <b>luxury tourism infrastructure</b> with sustainable, high-quality developments.
Investment in sustainable infrastructure and modernization of marinas	Increase investments in <b>eco-friendly marina</b> modernization projects.	

	Improvements in inter-island connectivity	Strengthen <b>inter-island transportation links</b> to improve regional mobility.
	Development of cruise tourism packages (itineraries in Macaronesia and the Caribbean)	Expand <b>thematic cruise packages</b> that showcase the unique attractions of Macaronesia and the Caribbean.
	Expansion of nautical and luxury tourism	Develop <b>premium nautical tourism services</b> to attract high-end visitors.
	Development of accessible infrastructure (adaptation of beaches, marinas, and tourism services)	Improve <b>accessibility in coastal tourism infrastructure</b> for inclusive travel experiences.
	Promotion of eco-tourism and regenerative tourism	Promote conservation-based tourism models that contribute to marine ecosystem protection.
<b>Sustainability and alignment with SDG and 2030 Agenda objective</b>	New forms of tourism promoting nature-based leisure activities	Develop <b>eco-tourism initiatives</b> that align with the growing interest in nature-based activities.
	Institutional support for the development of new sustainable tourism models	Enhance <b>public-private collaborations</b> to foster sustainable tourism innovation.
	Availability of European funds for sustainable tourism development	Optimize the use of <b>European funds for green and sustainable tourism</b> initiatives.
	Emergence of new leisure tourism variants related to coastal and marine tourism	<b>Diversify tourism products</b> by incorporating innovative coastal and marine leisure experiences.
	Implementation of eco-certifications: incentives for tourism operators to adopt sustainability seals such as 'Blue Flag' or 'Biosphere'	Provide <b>financial incentives and recognition programs</b> for sustainable tourism certifications.
	Greater coordination between administrations and the private sector: unified regional sustainability strategy	Develop <b>cross-sector cooperation platforms</b> to align sustainability initiatives at a regional level.
	Introduction of electric vessels	Support the transition to electric marine transportation by <b>providing funding and infrastructure</b> .
	Circular Economy: Strategies to reuse materials, reduce waste, and optimize resource use in the industry	Encourage <b>circular economy initiatives</b> by promoting waste reduction and resource optimization.
	Diversification towards regenerative and sustainable tourism models	Create <b>policy frameworks that incentivize regenerative tourism</b> and sustainability efforts.

	Positive contribution of the tourism sector to sustainable development goals and social impact	<b>Highlight the role of tourism</b> in social responsibility and sustainable economic development.
	Use of renewable energy in the tourism sector	Facilitate <b>renewable energy integration</b> in tourism businesses and infrastructure.
	Expansion of sustainable tourism certifications	<b>Encourage</b> more tourism operators to obtain <b>sustainability certifications</b> .
	Development of marine conservation projects funded by tourism	Develop <b>programs where tourists actively participate</b> in marine conservation efforts.
	Integration of circular economy practices in tourism	Encourage sustainable tourism businesses to integrate <b>circular economy models</b> .
	Potential for integrating local communities into sustainable tourism	Support <b>local tourism initiatives</b> that <b>align with community</b> development goals.
<b>Digital Transformation Dimension of the sectors</b>	Specific European funds for the digital transformation of the tourism sector	Accelerate digital transformation in the tourism sector through <b>targeted investment programs</b> .
	Use of Artificial Intelligence and other new technologies in the tourism industry	Adopt <b>AI-driven solutions to optimize customer experience</b> and personalize tourism offerings.
	Innovation and modernization of the tourism sector	Encourage investment in <b>tourism innovation hubs</b> to foster digital and technological advancements.
	Advanced digital strategies including automated marketing, influencers, and immersive experiences	Support businesses in adopting <b>cutting-edge digital marketing and immersive experience</b> technologies.
	Optimization of tourism management through technology (smart platforms to manage tourist flows in ports and beaches)	Implement <b>smart tourism management solutions</b> to optimize visitor distribution and resource use.
	Growth of experiential digital tourism (use of virtual and augmented reality for immersive experiences)	Introduce <b>virtual reality and AR technologies to enhance visitor engagement</b> in tourism experiences.
	Implementation of AI for personalized tourism experiences (virtual assistants recommending personalized aquatic and coastal activities)	Develop <b>AI-powered platforms for personalized tourism recommendations</b> and guided experiences.

	Expansion of IoT applications for sustainable tourism (sensors in marinas and beaches to monitor water quality)	Deploy <b>IoT-based monitoring systems</b> to improve sustainability practices in marine tourism.
	Use of blockchain for sustainable certifications (ensuring transparency in the certification process)	Adopt <b>blockchain technologies to enhance transparency and credibility</b> in sustainability certifications.
	Job opportunities for local communities	Facilitate <b>job creation initiatives in local coastal communities.</b>
<b>Human Capital Dimension and Staff Training</b>	Specific European funds for training and capacity-building programs	Expand <b>professional training programs</b> to upskill the workforce for the evolving tourism industry.
	Increased demand for sustainable tourism training programs	Expand <b>sustainable tourism certification programs</b> and training initiatives.
	Growth of employment in emerging 'blue economy' sectors (eco-tourism, scientific tourism, marine conservation)	Foster <b>employment opportunities in marine conservation, eco-tourism, and research</b> sectors.
	Implementation of digital training programs for tourism operators	Develop <b>digital literacy and innovation training programs</b> for tourism entrepreneurs.
	Greater integration of local communities in the tourism industry	<b>Empower local communities</b> to take an active role in sustainable tourism projects.
	Promotion of female leadership in the tourism sector	Promote <b>diversity and gender equality</b> by supporting <b>women in leadership roles</b> in tourism.
	Growth in training programs for sustainable tourism and digitalization	Increase <b>academic and professional training programs</b> focused on sustainable tourism and digitalization.
	Availability of skilled workforce in tourism and hospitality	Leverage the skilled tourism workforce to maintain service quality and innovation.
	Potential for developing startups and blue digital economy businesses	Create startup incubators and funding opportunities for tourism tech and sustainability ventures.
	Growth of data-driven tourism and personalized experiences	Utilize <b>Big Data and AI to provide tailored tourism experiences.</b>
	Job opportunities for young people	Promote <b>job placement programs for young professionals</b> in the tourism sector.

## 10.2.2 Approaches to ensure that the marine and ocean-related tourism sector actively contributes to achieving the Sustainable Development Goals

The **Sustainable Development Goals (SDGs)**, established by the United Nations as part of the **2030 Agenda for Sustainable Development**, serve as a global framework to address pressing environmental, social, and economic challenges.

These **17 interconnected goals** aim to promote prosperity while protecting the planet, focusing on critical issues such as climate action, responsible consumption, economic growth, and sustainable resource management. In the context of coastal and marine tourism, the SDGs emphasize the need for sustainable practices that balance economic development with environmental conservation and social well-being.

The following **table outline key approaches to ensure that the marine and ocean-related tourism sector actively contributes to achieving the SDGs**. This table presents strategic actions and best practices aligned with the SDGs, helping to promote sustainable tourism that fosters economic opportunities, protects marine ecosystems, and enhances the resilience of coastal communities throughout the Region.



Table 89. Contribution to achieving the Sustainable Development Goals	
SDG NUMBER 	ACTIONS & APPROACHES  <b>Actions &amp; Approaches to ensure that the marine and ocean-related tourism sector actively contributes to achieving the Sustainable Development Goals.</b>
<b>SDG 1: No Poverty</b> 	<ul style="list-style-type: none"> <li>✓ <b>Promote local employment</b> in sustainable marine activities (eco-tour guides, diving instructors, marine conservation jobs).</li> <li>✓ <b>Support coastal communities</b> by creating economic opportunities linked to responsible tourism.</li> <li>✓ <b>Develop community-based tourism projects</b> where profits are reinvested in education and social development.</li> </ul>
<b>SDG 2: Zero Hunger</b> 	<ul style="list-style-type: none"> <li>✓ <b>Encourage sustainable fishing</b> through eco-certifications and support for local fishermen.</li> <li>✓ <b>Promote the use of sustainable seafood</b> in tourist gastronomy.</li> <li>✓ <b>Support responsible aquaculture</b> and integrate it into the tourism sector.</li> </ul>



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<p><b>SDG 3: Good Health and Well-being</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Promote nautical and sports activities</b> (diving, surfing, paddleboarding, swimming) as part of healthy tourism.</li> <li>✓ <b>Enhance maritime safety and rescue systems</b> for tourists and workers.</li> <li>✓ <b>Reduce water and air pollution</b> in tourist destinations.</li> </ul>
<p><b>SDG 4: Quality Education</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Develop environmental awareness programs</b> for tourists and operators on marine biodiversity and conservation.</li> <li>✓ <b>Provide specialized training</b> in sustainable tourism, marine biology, and ocean conservation.</li> <li>✓ <b>Collaborate with universities</b> to develop applied research in marine tourism.</li> </ul>
<p><b>SDG 5: Gender Equality</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Promote female employment</b> in maritime activities (female captains, diving instructors, marine researchers).</li> <li>✓ <b>Support local women entrepreneurs</b> in sustainable tourism businesses.</li> <li>✓ <b>Ensure equal pay and leadership opportunities</b> in the sector.</li> </ul>
<p><b>SDG 6: Clean Water and Sanitation</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Reduce plastic use</b> on beaches, boats, and tourist activities.</li> <li>✓ <b>Implement efficient wastewater management</b> in marinas and coastal hotels.</li> <li>✓ <b>Encourage Blue Flag certifications</b> for beaches, marinas and boats.</li> </ul>
<p><b>SDG 7: Affordable and Clean Energy</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Integrate renewable energy sources</b> in coastal tourism infrastructure.</li> <li>✓ <b>Develop sustainable boats</b> powered by solar or electric energy.</li> <li>✓ <b>Optimize energy consumption</b> in hotels and marine tourism centers.</li> </ul>



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<p><b>SDG 8: Decent Work and Economic Growth</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Promote stable and well-paid jobs</b> in the marine tourism sector.</li> <li>✓ <b>Encourage regenerative tourism initiatives</b> that benefit the local economy.</li> <li>✓ <b>Support fair trade and local suppliers</b> in tourism-related businesses.</li> </ul>
<p><b>SDG 9: Industry, Innovation, and Infrastructure</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Develop sustainable port infrastructure</b> with low environmental impact.</li> <li>✓ <b>Implement IoT technologies</b> to enhance tourist experiences and maritime safety.</li> <li>✓ <b>Support tourism startups</b> using digital innovation for marine tourism.</li> </ul>
<p><b>SDG 10: Reduced Inequalities</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Ensure accessibility in tourism activities</b> for people with disabilities.</li> <li>✓ <b>Diversify tourism offerings</b> to cater to different population segments.</li> <li>✓ <b>Support small tourism businesses</b> to compete with large operators.</li> </ul>
<p><b>SDG 11: Sustainable Cities and Communities</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Control overtourism</b> to prevent the degradation of coastal areas.</li> <li>✓ <b>Develop sustainable mobility plans</b> in tourist destinations.</li> <li>✓ <b>Preserve the cultural identity</b> of coastal communities.</li> </ul>

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<p><b>SDG 12: Responsible Consumption and Production</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Reduce waste in hotels, boats, and tourist restaurants.</b></li> <li>✓ <b>Promote eco-tourism</b> and responsible tourism experiences.</li> <li>✓ <b>Encourage sustainable certifications</b> for marine tourism operators.</li> </ul>
<p><b>SDG 13: Climate Action</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Reduce the carbon footprint</b> of transport and tourist accommodation.</li> <li>✓ <b>Protect coastal ecosystems</b> from climate change impacts.</li> <li>✓ <b>Use technology to monitor the environmental impact</b> of tourism.</li> </ul>
<p><b>SDG 14: Life Below Water</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Conserve marine biodiversity</b> through responsible tourism practices.</li> <li>✓ <b>Implement strict regulations</b> on aquatic activities to protect sensitive habitats.</li> <li>✓ <b>Support coral reef and mangrove restoration programs.</b></li> </ul>
<p><b>SDG 15: Life on Land</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Protect coastal areas and dunes</b> from erosion.</li> <li>✓ <b>Encourage nature tourism</b> in harmony with biodiversity.</li> <li>✓ <b>Support mangrove reforestation projects</b> to preserve coastlines.</li> </ul>
<p><b>SDG 16: Peace, Justice, and Strong Institutions</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Ensure transparency and governance</b> in marine tourism.</li> <li>✓ <b>Promote community participation</b> in tourism management.</li> <li>✓ <b>Combat illegal activities</b> such as poaching or marine species trafficking.</li> </ul>

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<p><b>SDG 17: Partnerships for the Goals</b></p> 	<ul style="list-style-type: none"> <li>✓ <b>Foster public-private partnerships</b> to drive sustainable tourism.</li> <li>✓ <b>Engage in international networks</b> for responsible tourism.</li> <li>✓ <b>Encourage knowledge exchange</b> with other sustainable island regions.</li> </ul>



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