



## MOVING THE FOCUS IN DIGITAL NOMADISM FROM AGENTS TO PLACES: THE CASE OF THE CANARY ISLANDS

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de Desarrollo Regional  
“Una manera de hacer Europa”

# INTRODUCTION

- 1) **Digital capitalism** has contributed to create new forms of organization, in which work and place have lost weight as identity elements, and delocalization, deregulation and leisure have gained importance.
- 2) In this socio-productive context, new lifestyles linked to residential relocation are appearing, such as **digital nomads** (those digital workers who make mobility the structuring axis of their way of life) and **remote workers** (those who have voluntarily relocated their residence temporarily in favor of some place, where they carry out a lifestyle model in which leisure and work be compatible).
- 3) Both modalities have shown great **strength in the last decade** and a growing trend with the COVID-19 pandemic. The **pandemic has favored** residential relocation and nomadism linked to teleworking.
- 4) As a consequence, in recent years, **an international market of places** for digital nomads and remote workers has developed in which a growing number of Spanish cities and tourist spaces are included. Some Canary cities and tourist destination are relevant part of this emerging market.
- 5) In the conformation of these destinations, the **policies** developed from the national, regional and local scale have had a significative impact.

# OBJETIVES

- 1) Recognize the **level of implementation of digital nomadism and workstation migration in the main Spanish destinations** in times of pandemic, with special attention to the Canary Islands.
- 2) **Analyze local policies** to promote digital nomadism and remote work, as well as their effects.



# HYPOTHESIS

- 1) the pandemic has contributed to consolidate digital nomadism and the settlement of remote workers in certain urban-tourist areas, to the extent that it has become a substitute mobility for tourism.
- 2) the growth in the arrival of digital nomads and remote workers during the pandemic has been one of the factors that have strengthened tourism specialization in the receiving places, since promotional campaigns carried out by the institutions.

# SOURCES AND METHODOLOGY

## Digital nomads and teleworkers:

- 1) It is difficult to track digital nomads and teleworkers by means of traditional statistics, which has oriented the research conducted towards **qualitative** rather than quantitative.
- 2) In correspondence, we have used **archivals of press; forums** and **web portals; semi-structured in-depth interviews** and **participant observation** in digital nomads' social events and co-working and co-living spaces to study the digital nomads and teleworkers (Repeople).

## Destinations:

- 1) We have used **virtual spaces** such as NomadList.com; aecoworking.org or acecanarias.org and **social networks** like “Gran Canaria Digital Nomad” or “Canary Islands Digital Nomads & Remote Workers”, etc.
- 2) Besides, we have worked with a **sample of accommodation** that has carried out business formulas to attract to digital nomads and workation migrants during pandemic.
- 3) Finally, we have analyzed **promotional campaigns, websites and networks promoted by public agents** conducted to increase the presence of this mobility segment.

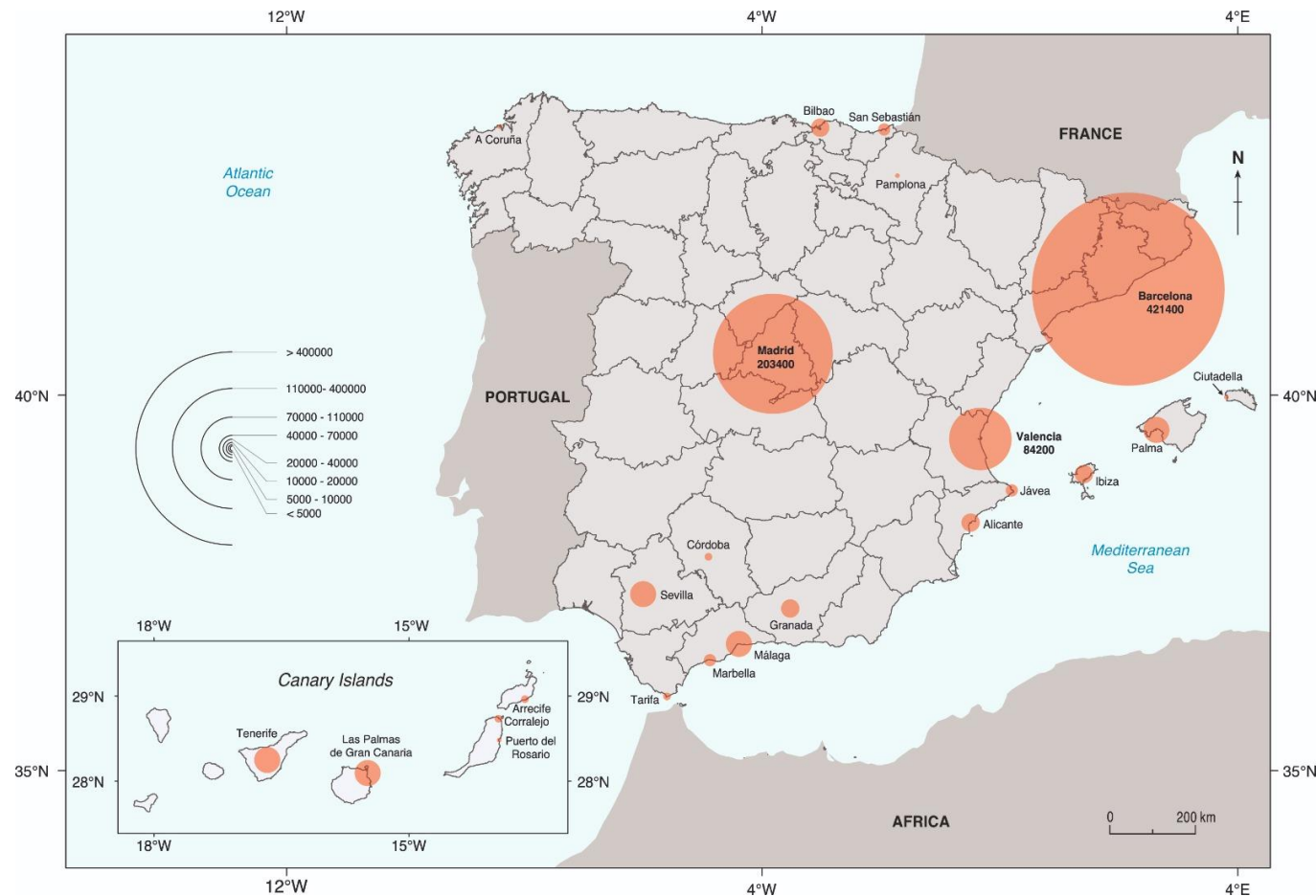
# DIGITAL NOMADS AND TELEWORKERS IN SPAIN

- Spain is a destination of global importance in the reception of digital nomads, with 23 relevant destinations.
- According to social networks, there are three segments:
  - 1) digital nomads in the strict sense (knowledge economy through the Internet + highly mobile). Young people and, in all cases, mobility gives meaning to their way of life.
  - 2) nomadic families (couples). A greater incidence in non-school periods (shorter stays) or in longer stays (during an entire academic year).
  - 3) corporate nomads, linked to the increase of teleworking. The segment that has growth with pandemic.

# DIGITAL NOMADS AND TELEWORKERS IN SPAIN

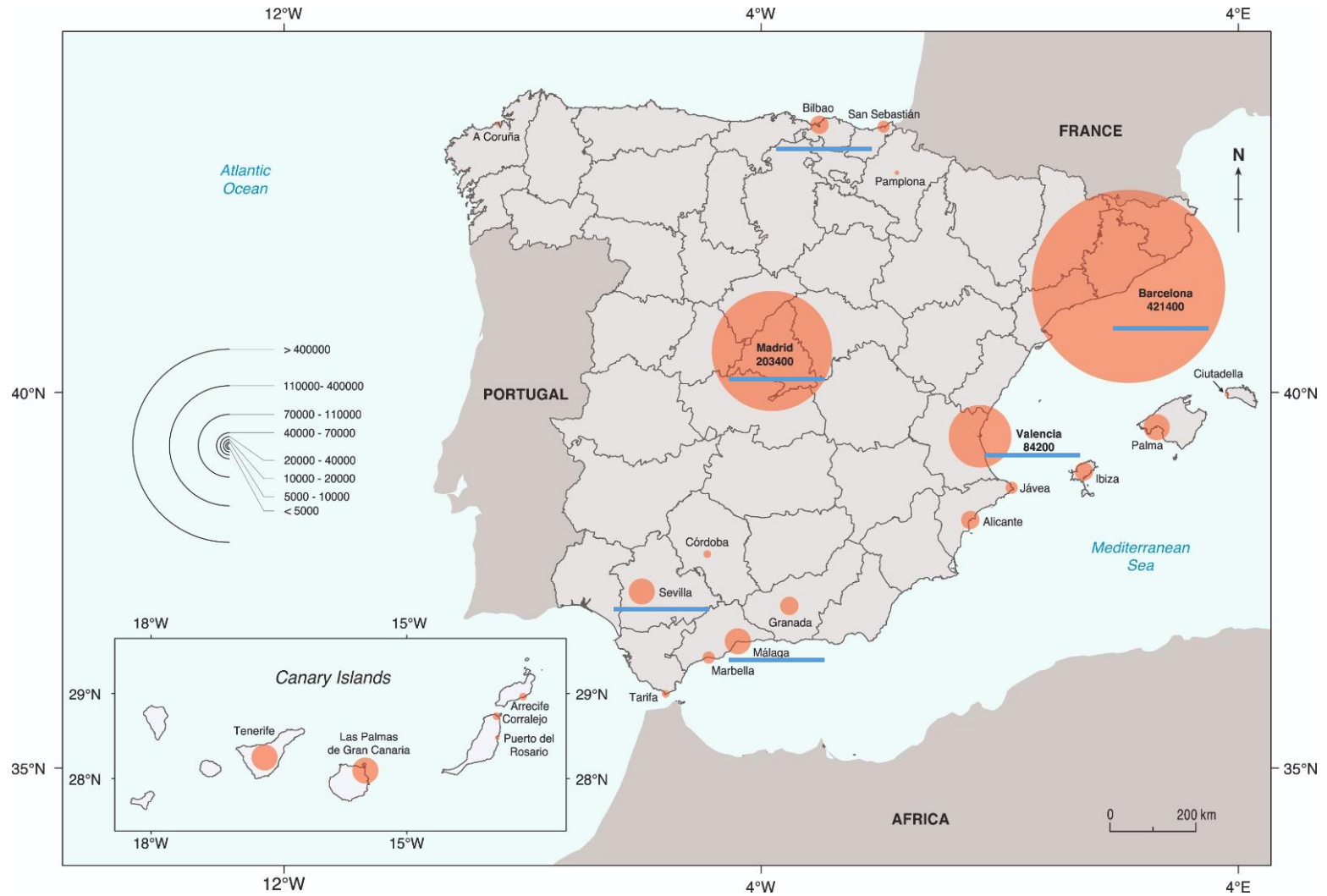
- Most of the destinations of digital nomads and teleworkers are located in coastal areas, coinciding with the main Spanish tourist and urban destinations.

Number of digital nomads who have visited Spanish destinations.



Source: Nomad List  
(2021)

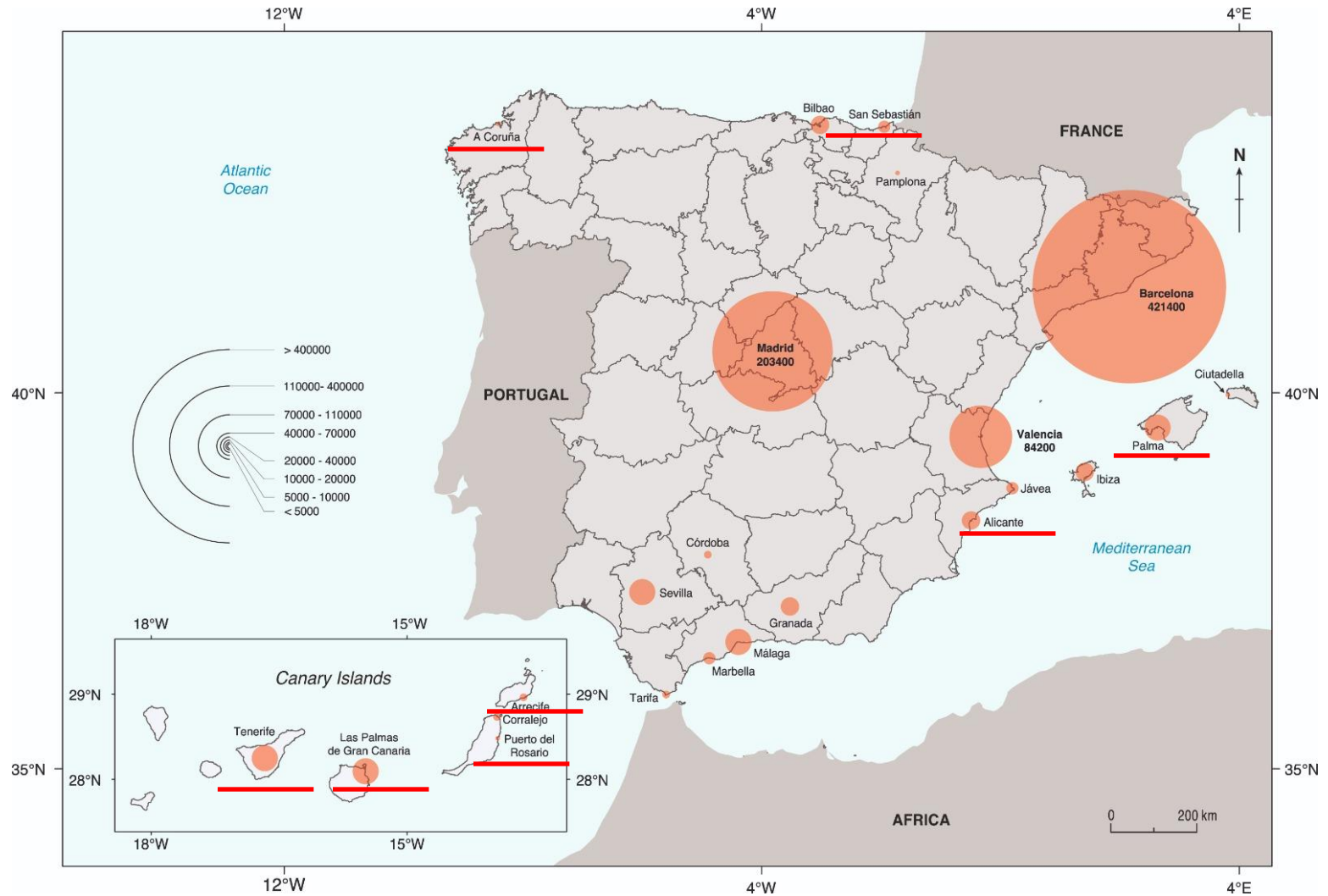
# DIGITAL NOMADS AND TELEWORKERS IN SPAIN



- Main economic centers
- Coastal urban-tourist centers
- Tourist destinations
- Inland heritage cities

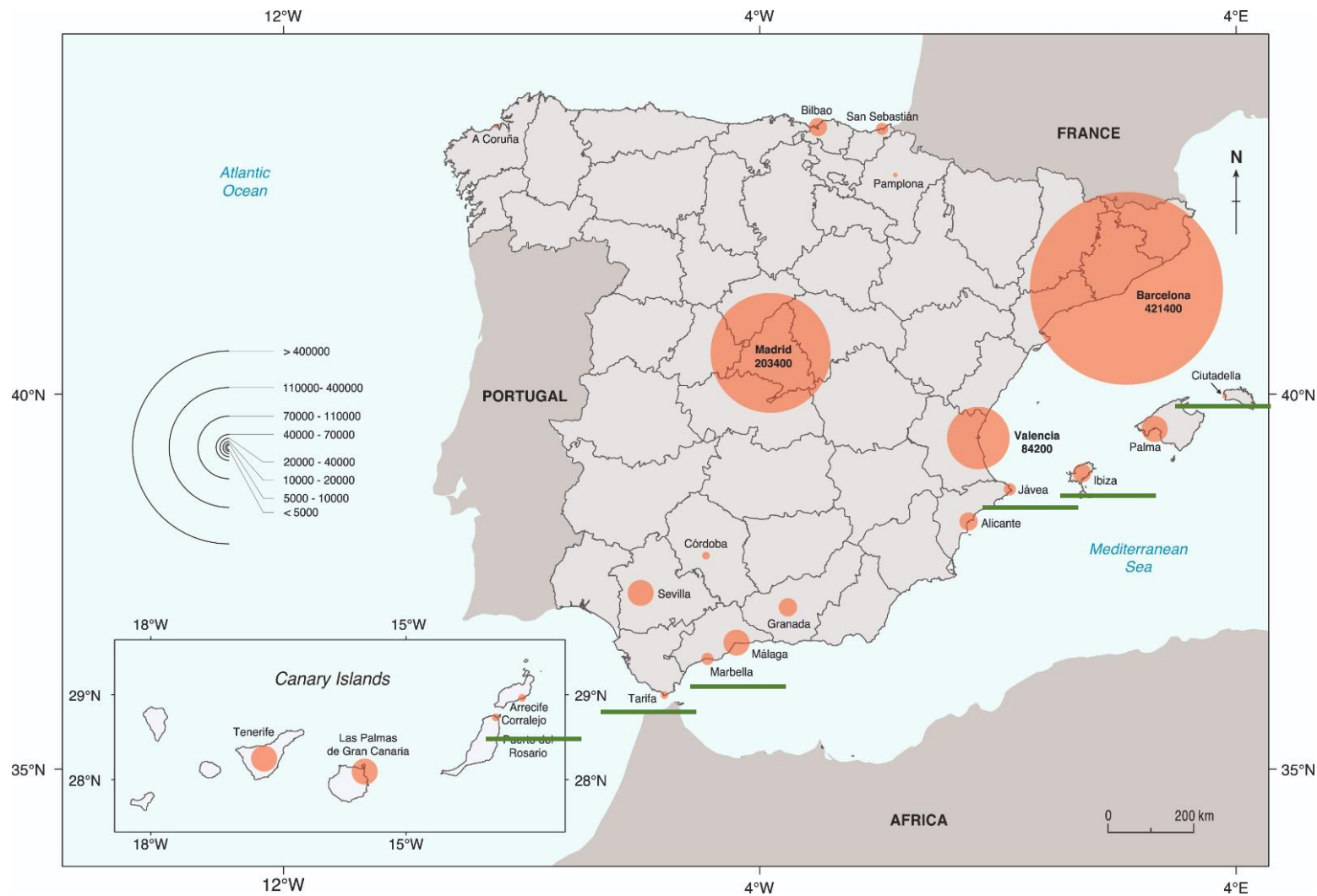


# DIGITAL NOMADS AND TELEWORKERS IN SPAIN



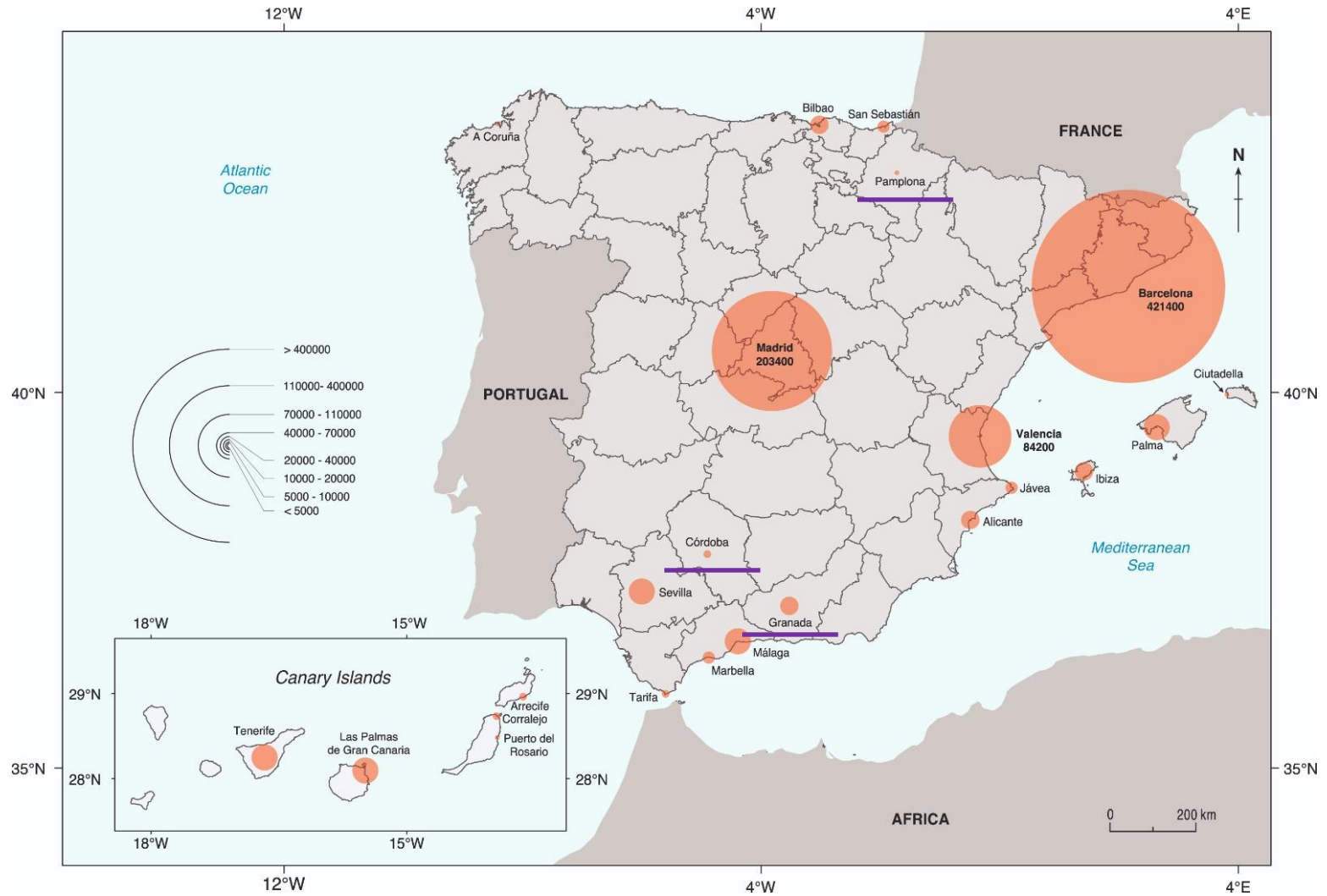
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# DIGITAL NOMADS AND TELEWORKERS IN SPAIN

- **Attraction Factors:**
  - **Good weather** and air quality
  - **Differentiation based on local recourses (beaches, cultural life, cosmopolitan environment, urban life...)**
  - **Low cost of living**
  - High internet speed and good open connectivity in public spaces
  - Good value for money in collaborative workplaces and availability
  - Leisure activities and environmental and cultural attractions
  - Safety and tolerant urban environment for women, foreigners or LGBTQ+
  - Good educational and health level
  - Facilities for investment
  - Good level of remuneration in relation to the cost of living
  - Ease of using English in everyday life
  - Possibility of moving around cities on foot
  - Good public transport links
  - Low traffic levels



# DIGITAL NOMADS AND TELEWORKERS IN SPAIN

- Attraction Factors:
  - **Good weather and differentiation based on local resources**



Corralejo, Fuerteventura



Las Palmas de  
Gran Canaria



# DIGITAL NOMADS AND TELEWORKERS IN SPAIN

- Attraction Factors:

- **Low cost of living.**

This has a great weight in the valuation of destinations, which indicates that we are not dealing with a mobility of the privileged but a mobility in which transnational disparities in the cost of living become a factor for attraction.

The price of accommodation is the main factor that conditions the differences in costs.

The cost of living is a key factor in the disparities according to length of stay. The average is 10.7 days in Spain, but in cheapest cities such as Las Palmas de Gran Canaria, Tenerife, Corralejo or Jávea, stays exceed 25 days.

# POLICY AGENDA AND DIGITAL NOMADISM

- In recent years, destinations around the world have responded to the new phenomenon of digital nomadism and started to market and project themselves as being digital nomad friendly sites
- From the perspective of the states, the first measure implemented prior to the COVID-19 pandemic useful to digital nomad was: the e-Residency of Estonia.
- In 2020 Estonia introduced the digital nomad visa (a maximum stay of one year in the country for location-independent workers who perform their duties remotely using telecommunications technology. The Barbados government introduced a “12-month Barbados Welcome Stamp” to invite remote workers to stay on the island.
- In 2022, the number of countries with specific visas rose to 33 and in the coming months the number will continue to increase.
- In all these cases, it is for a foreigner who teleworks for a company or for his own company without the company being registered in the country and without performing any services for employers in the country.

Alemania	↑	36	100 \$	Si	Si
Anguila	↓	12	2000 \$	Si	Si
Antigua Barbuda	↓	24	1500 \$	Si	Si
Aruba	↔	3	75 \$	Si	No
Barbados	↔	12	2000 \$	Si	Si
Bermuda	↔	12	260 \$	Si	Si
Brasil	↔			Si	Si
Cabo Verde	↓	6	60 \$	Si	Si
Costa Rica	↔	24	550 \$	Si	Si
Croacia	↔	12	155 \$	Si	Si
Curaçao	↓	6	300 \$	Si	No
Chipre	↑	12	65 \$	Si	Si
Dominica	↓	18	900 \$	Si	Si
Ecuador	↑	24	450 \$	Si	Si
Emiratos Árabes	↑	12	610 \$	Si	Si
Estonia	↑	12	100 \$	Si	Si
Georgia	↔	12	35 \$	Si	Si
Granada	↔	12	1500 \$	Si	Si
Grecia	↔	12	90 \$	Si	Si
Islandia	↓	6	60 \$	Si	Si
Islas Caimán	↓	24	1470 \$	Si	Si
Islas Seychelles	↑	12	50 \$	Si	Si
Malta	↑	6	315 \$	Si	Si
Mauricio	↔	12	0 \$	Si	Si
México	↑	12	45 \$	Si	Si
Montserrat	↔	12	500 \$	Si	Si
Noruega	↔	48	630 \$	Si	Si
Panamá	↑	9	300 \$	Si	Si
Portugal	↑	12	165 \$	Si	Si
República Checa	↑	12	165 \$	Si	Si
Rumanía	↑	12	125 \$	Si	Si
Santa Lucía	↔	12	70 \$	Si	Si
Sri Lanka	↔	12	500 \$	Si	Si

# POLICY AGENDA AND DIGITAL NOMADISM

- In Spain, to date, most non-EU digital nomads reside with a tourist visa, which extends up to three months when required.
- It is expected that by the end of 2022 the preliminary draft of the Law for the Promotion of the Startup Ecosystem will have been approved, which contemplates the creation of a new visa for remote workers and digital nomads working for foreign companies and residing in the country.
- However, most of the digital nomads that Spain receives come from European Economic Area (Schengen Area) and visa is not required.
- Therefore, the stimulus measures for attracting digital nomads at regional and local level have had the greatest impact. Unlike state action, these institutions have developed numerous initiatives to attract both national and international digital nomads, especially following the onset of the pandemic.

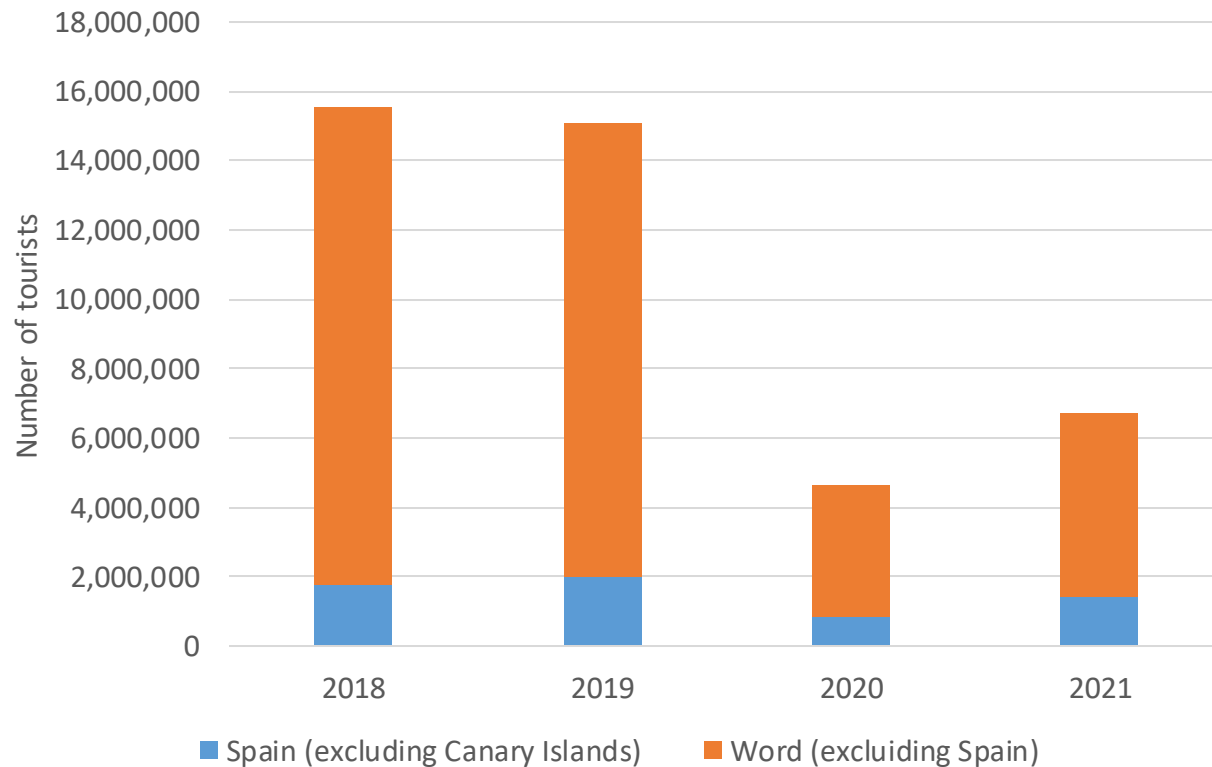




# POLICY AGENDA AND DIGITAL NOMADISM

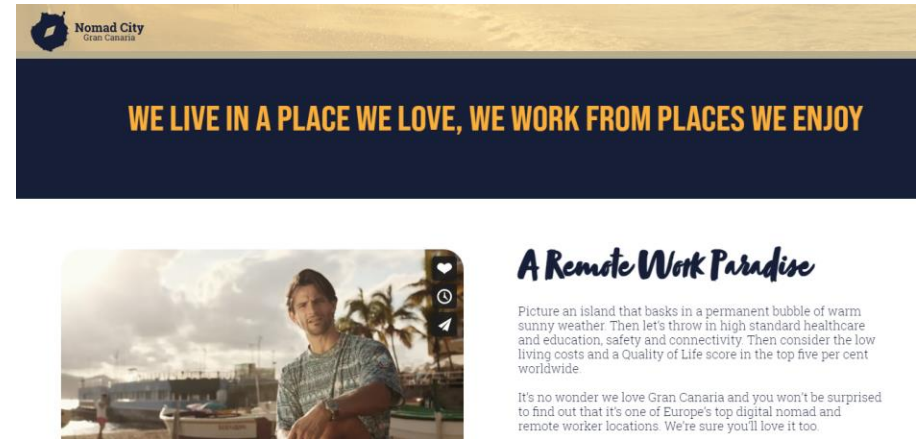
- An example of what has been done in the main destinations of the Canary Islands is that these actions have treated the mobility of these workers as a subtype of tourist mobility, replacing part of the traditional tourist flows that ceased to be received with the pandemic.

Tourist arrivals to The Canary Islands, 2018-2021



# POLICY AGENDA AND DIGITAL NOMADISM

- The first actions date back to 2014 and were carried out by the Repeople company, in coordination with the Gran Canaria Tourist Board and the City Council of Las Palmas de Gran Canaria.
- That year, this company created a platform for information on resources and promotion of the destination for digital nomads (**Nomad City Gran Canaria**)
- In 2016 it undertook the annual organization of a thematic conference that has ended up consolidating itself as that with the greatest impact on the European market (**Repeople Conference**).











# POLICY AGENDA AND DIGITAL NOMADISM

- In Tenerife, the public action was coordinated under the umbrella of the **Tenerife Work & Play** brand. The initiative has focused on information and promotion, involving information on accommodation, workspaces, visa procedures, residence permits, health, education, learning Spanish and practical information on the destination, etc.
- A joint administrative orientation action has been created (**Landing Package**) and a welcome program (**Welcome Pass**) with information and discounts on various leisure services and the organization of welcome and socialization events.
- The creation of groups has also been stimulated with the **Digital Nomads Tenerife space and others in social networks** (Tenerife Remote Workers & Digital Nomads Meetup, Slack and Facebook). The latter had more than 17,000 members at the beginning of 2022.



Groups you might want to join

	<b>Tenerife Remote Workers &amp; Digital Nomads</b> Facebook group
	<b>Tenerife Remote Workers &amp; Digital Nomads</b> Meetup group
	<b>Tenerife Remote Workers &amp; Digital Nomads</b> Slack group
	<b>Workeamos virtual coworking</b> Slack Group
	<b>Remote Workers &amp; Startups Tenerife</b> Meetup group
	<b>Tenerife Tech &amp; Biz</b> Meetup group
	<b>Blockchain Tenerife</b> Meetup group
	<b>TenerifeDev</b> Meetup group

# POLICY AGENDA AND DIGITAL NOMADISM

- In 2020, with the pandemic, the regional government has initiated other actions, which are justified by the need to diversify the tourism model of the islands. Specific, the Canary Islands Government launched a promotion and information campaign aimed at attracting 30,000 remote workers with the purpose of having them settle on the islands for 1 to 3 months (“The office with the best climate in the world”). The usual means of tourism promotion, media and specialized online spaces such as WIFI Tribe were used. In this year, the number of digital nomads and remote workers had increased by 10%. In 2021, the number of digital nomads grew 67%

**“The office with the best climate in the world wants remote worker” achieves 31.5 million impacts in media and social media**



# POLICY AGENDA AND DIGITAL NOMADISM

- The most significant impact has been the creation of **long-term tourism products by private agents**, based on the **reduction of hiring prices** and the **incorporation of services demanded by remote workers**. Besides, **new accommodation** targeted to remote workers is appearing.

ART Las Palmas G.C.



Playa del Sol Hotel

## El hotel donde no hay crisis en Canarias gracias al teletrabajo y los nómadas digitales

En medio de la incertidumbre turística y con una Semana Santa bajo mínimos, hay empresas que se reinventan. En Gran Canaria un hotel roza el lleno gracias a alemanes, ingleses, franceses y suizos convertidos en nómadas digitales



▲ Klaus, alemán que antes del virus vivía entre Barcelona y Múnich, decidió trasladarse a Gran Canaria cuando se endurecieron las restricciones. Ahora paga 650 euros al mes por su apartamento en Playa del Inglés FOTO: LAURA DE PABLO / LA RAZÓN

# Conclusions

- Digital nomadism has become increasingly important in recent years. In Spain, international tourism destinations, such as the main urban centers, urban-tourist areas and areas of coastal tourism specialization, as well as some inland heritage cities, also receive most of the flows of digital nomads and workation migrants.
- This is not a mobility of the privileged, in general term. Its distribution on an international scale is conditioned by the disparity of salaries between territories. Digital nomadism behaves in a similar way to other mobilities, such as tourism or lifestyle migrations, which are based on differences in purchasing power between regions and countries.
- This mobility has proved to be more resilient than tourism in times of pandemic, which is why initiatives have been launched to attract digital nomads. The fact that the destinations of nomads and tourists coincide has led to the consolidation of digital nomadism as a temporary substitute for tourist mobility during pandemic.
- In Spain, the public action has been carried out by regional or local institutions and by groups of tourism entrepreneurs as an tourist adaptive strategy, unlike other countries.
- In summary, in the current context of digital capitalism and specifically during the pandemic, the analysis of digital nomadism and workation migrations in Spain, from the perspective of place and the policies developed, allows to reflect on the blurred boundaries between tourist, labor and lifestyle mobility, and on the relationship between regional socioeconomic imbalances and labor migrations.





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