



# SPAIN - CANARY

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A comparison of 2017 and 2023 air services between Scotland and Spain

# **Key Statistics About Spanish Tourists**

- 5th Largest international inbound market to Scotland by visitors
- 5% of overseas tourists to Scotland are Spanish
- Spanish tourists contribute 3% of overseas tourism spending
- Numbers of Spanish tourists are above pre-pandemic levels but are below 2022 levels

# 2017 DIRECT SPANISH CANARY ROUTES

## Aberdeen Airport

- Gran Canaria - Las Palmas
- Tenerife

## Glasgow Airport

- Lanzarote - Arrecife
- Fuerteventura
- Gran Canaria - Las Palmas
- Tenerife

## Edinburgh Airport

- Lanzarote - Arrecife
- Fuerteventura
- Gran Canaria - Las Palmas
- Tenerife

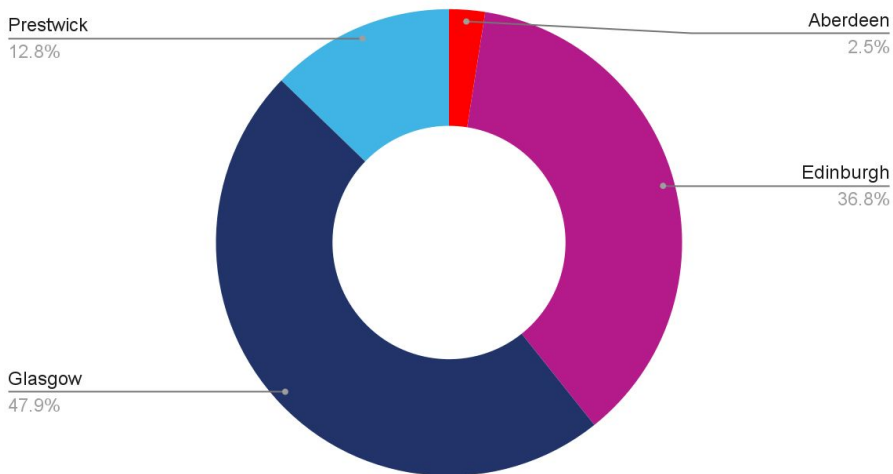
## Prestwick Airport

- Lanzarote - Arrecife
- Fuerteventura
- Gran Canaria - Las Palmas
- Tenerife

# 2017 PASSENGER NUMBERS

- Aberdeen - Gran Canaria = 7,363
- Aberdeen - Tenerife = 25,957
- Edinburgh - Lanzarote = 94,926
- Edinburgh - Fuerteventura = 61,603
- Edinburgh - Gran Canaria = 81,385
- Edinburgh - Tenerife = 253,726
- Glasgow - Lanzarote = 181,123
- Glasgow - Fuerteventura = 86,815
- Glasgow - Gran Canaria = 108,596
- Glasgow - Tenerife = 264,087
- Prestwick - Lanzarote = 33,729
- Prestwick - Fuerteventura = 17,405
- Prestwick - Gran Canaria = 25,810
- Prestwick - Tenerife = 93,674

## 2017 Market Share



**1,336,199 DIRECT PASSENGERS BETWEEN SPANISH CANARY ISLANDS AND SCOTLAND**

# 2017 SUMMARY

- Glasgow had the highest number of passengers travelling to the Spanish Canary Islands, however, no airport in Scotland commanded the majority of the market.
- Gran Canaria and Tenerife were the only two Canary Islands to be served from all 4 airports.

# 2023 DIRECT SPANISH CANARY ROUTES

## Aberdeen Airport

- Tenerife

## Glasgow Airport

- Lanzarote - Arrecife
- Fuerteventura
- Gran Canaria - Las Palmas
- Tenerife

## Edinburgh Airport

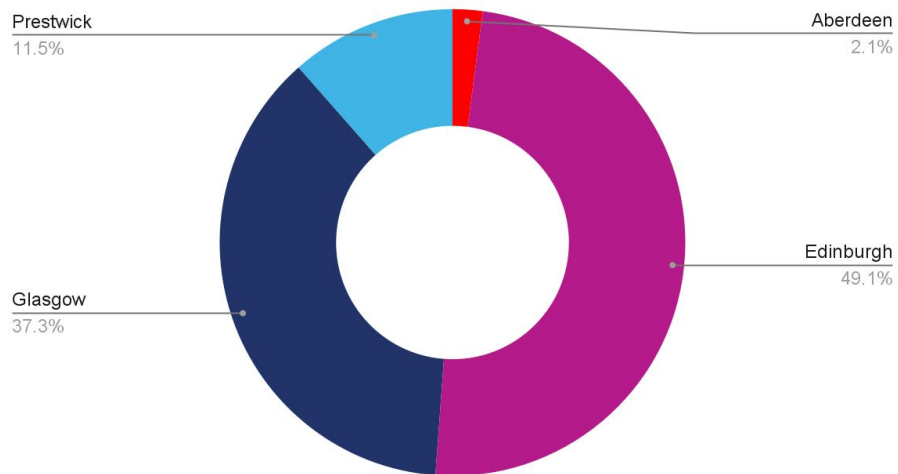
- Lanzarote - Arrecife
- Fuerteventura
- Gran Canaria - Las Palmas
- Tenerife

## Prestwick Airport

- Lanzarote - Arrecife
- Gran Canaria - Las Palmas
- Tenerife

# 2023 PASSENGER NUMBERS

## 2023 Market Share



- Aberdeen - Tenerife = 29,163
- Edinburgh - Lanzarote = 181,656
- Edinburgh - Fuerteventura = 98,252
- Edinburgh - Gran Canaria = 86,992
- Edinburgh - Tenerife = 320,165
- Glasgow - Lanzarote = 126,435
- Glasgow - Fuerteventura = 40,791
- Glasgow - Gran Canaria = 112,001
- Glasgow - Tenerife = 243,250
- Prestwick - Lanzarote = 34,798
- Prestwick - Gran Canaria = 28,498
- Prestwick - Tenerife = 97,718

**1,399,719 DIRECT PASSENGERS BETWEEN THE CANARY ISLANDS  
AND SCOTLAND**

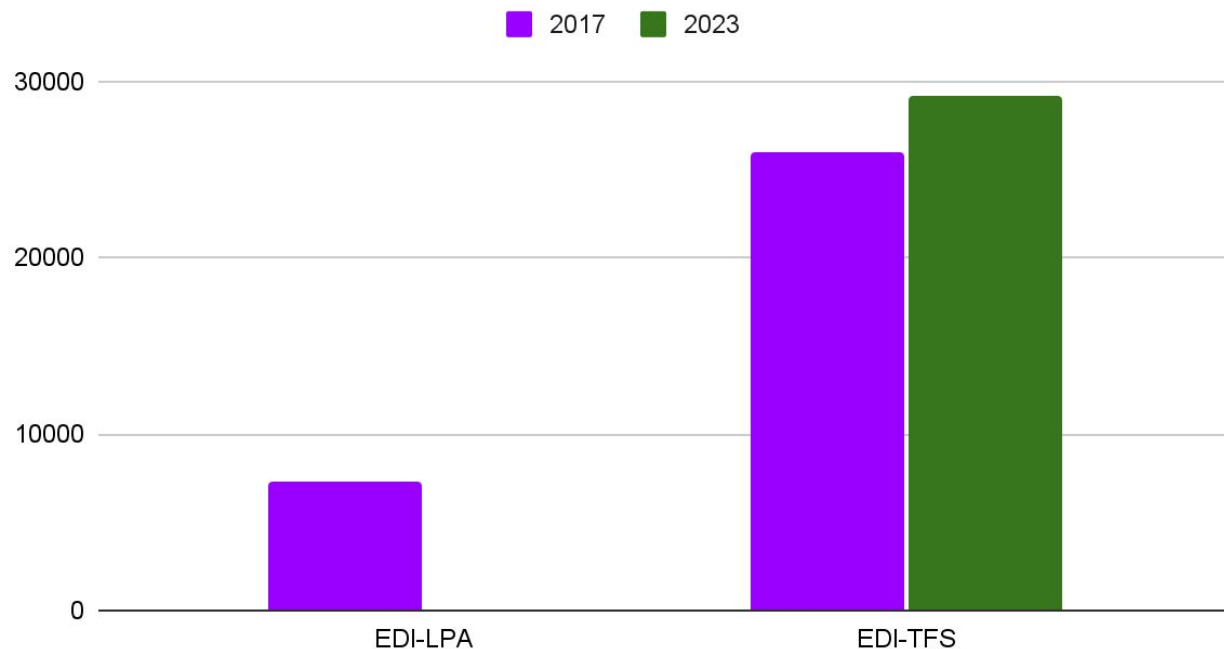
# 2023 SUMMARY

- Edinburgh had the largest % of passengers to the Canary Islands, but narrowly missed out on having the majority of the market.



# 2017/2023 COMPARISON - ABZ ONLY

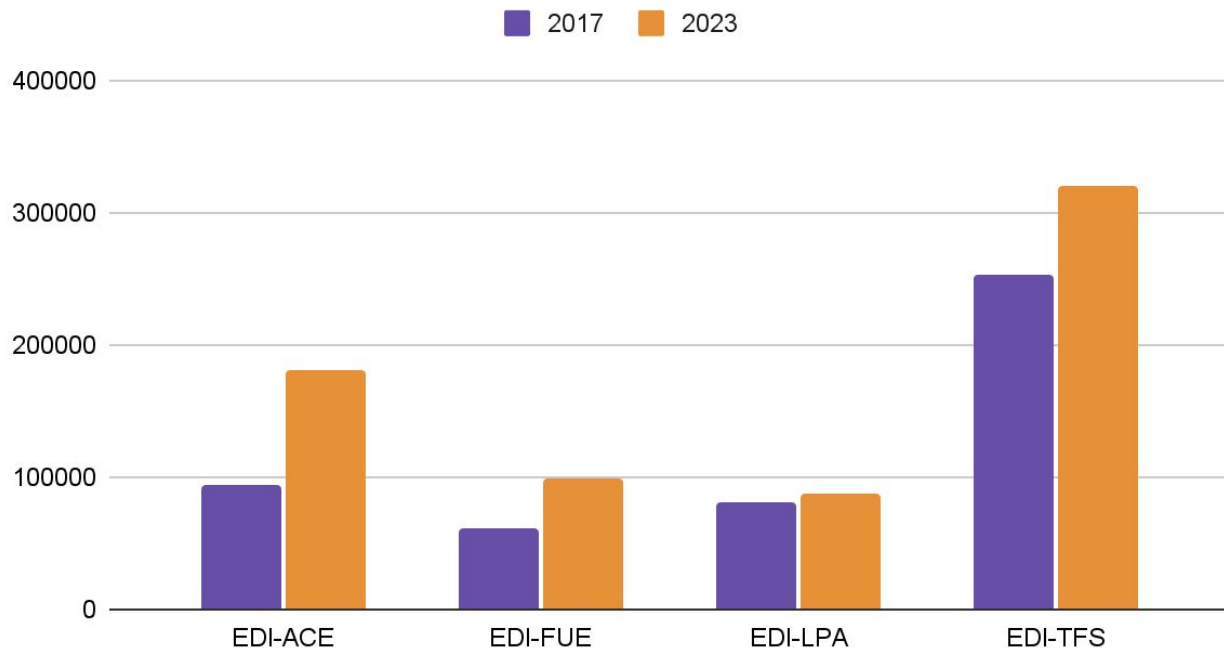
## 2017/2023 Comparison - ABZ Only



**ABZ** = Aberdeen  
**LPA** = Gran Canaria  
**TFS** = Tenerife

# 2017/2023 COMPARISON - EDI ONLY

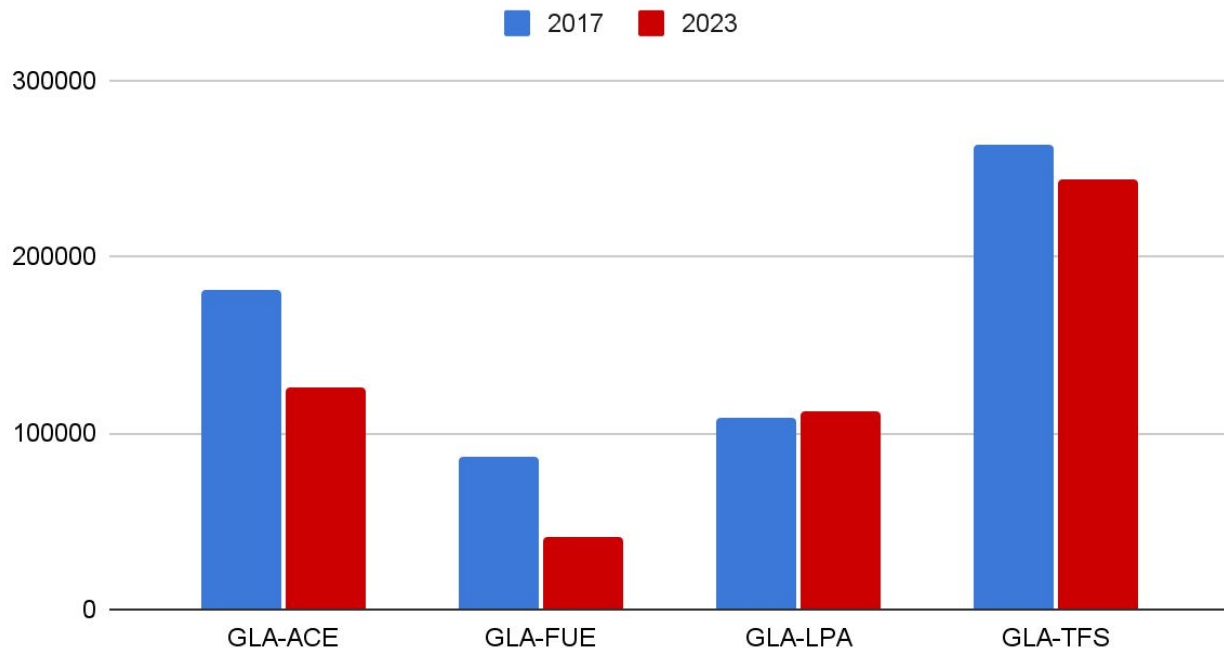
## 2017/2023 Comparison EDI Only



**EDI** = Edinburgh  
**ACE** = Lanzarote  
**FUE** = Fuerteventura  
**LPA** = Gran Canaria  
**TFS** = Tenerife

# 2017/2023 COMPARISON - GLA ONLY

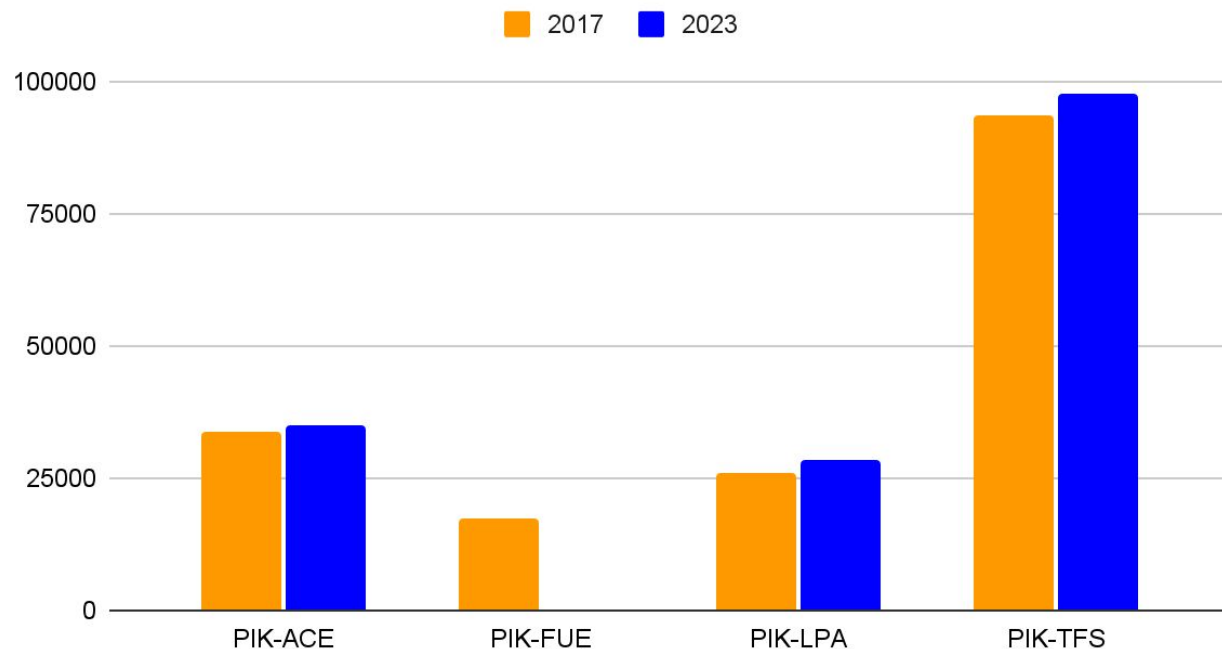
## 2017/2023 Comparison - GLA Only



**GLA** = Glasgow  
**ACE** = Lanzarote  
**FUE** = Fuerteventura  
**LPA** = Gran Canaria  
**TFS** = Tenerife

# 2017/2023 COMPARISON - PIK ONLY

## 2017/2023 Comparison - PIK Only



**PIK** = Prestwick  
**ACE** = Lanzarote  
**FUE** = Fuerteventura  
**LPA** = Gran Canaria  
**TFS** = Tenerife

# 2017/2023 COMPARISON - NOTES

- The following routes that operated in 2017 did not operate in 2023;
  - **Aberdeen** to Gran Canaria
  - **Prestwick** to Fuerteventura
- Edinburgh has overtaken Glasgow as the market leader for the Canary Islands, but even in 2023 there was no single airport holding the majority of the market.
- One significant factor that cannot be overlooked is the collapse of Thomas Cook in 2019 which significantly impacted the package holiday market to Spain.
  - Extra easyJet, TUI and Ryanair capacity has been added, but has not yet offset the lost TM capacity

# LOOKING AT 2024

- **Edinburgh;** A summary of the changes are below
  - No new routes to the Canary Islands have been introduced in 2024, however, Jet2 will use larger A321 aircraft from the end of October on some flights
- **Glasgow;** easyJet will introduce 2 new winter sun routes to the Canary Islands in October;
  - Fuerteventura will operate 2x week
  - Lanzarote will operate 2x week
    - These 2 routes being introduced will mean that Glasgow is the only airport in Scotland that has an easyJet service to all 4 Canary Islands.