

Activity Trend of Low Cost Carriers in Spain since 2000.

Maria Elena Sedano Santamaría

Instituto de Estudios Turísticos.

Secretaría de Estado de Turismo.

Ministerio de Industria, Turismo y Comercio.

PRESENTATION

The boom of low cost carriers (LCCs) in Spain has been seen as a driving force behind international tourism flows. In general the activity of these companies has been bound up with residential tourism and individual trip organisation; they have also been attributed with an instrumental role in the short-break type of trip.

This paper presents the main low-cost-carrier business figures, as monitored by statistical working up of the records of international flight arrivals at Spanish airports and it also gives information on the sociodemographic and trip-related characteristics of the tourists using companies of this type. This information can then be used to bear out some of the commonplace assumptions made about LCCs, such as a higher use of internet or lower likelihood to use package travels, while also testing other common suppositions, such as these tourists' preference for non-hotel accommodation or their lower trip expenditure than tourists travelling with the other air companies.

The first section deals with the methodology used in writing the paper, section two then continuing with an analysis of the LCC activity trend since 2000 (flights, passengers and occupancy rate). The third section concentrates on the origin and destination relationships of LCC flights. Section four then describes the sociodemographic characteristics of the tourist flying to Spain on low cost carriers during the last four years. The fifth section deals with the trip characteristics of these tourists, the paper then winding up with an annex of the tables showing the main results set forth in the text.

1. Methodology

The low-cost-company analysis made by the Tourism Studies Institute (*Instituto de Estudios Turísticos*: IET), as presented herein, is based on two information sources of a different but highly complementary nature: firstly the records sent monthly to IET by the Spanish Airports and Air Navigation Authority (*Aeropuertos Españoles y Navegación Aérea*: Aena) showing the number of passengers on international flights to Spain; secondly, IET's surveys of foreign tourists arriving in Spain as part and parcel of the Tourism Expenditure Survey (*Encuesta de Gasto Turístico*: Egatur).

- **Aena's Records.** Under the collaboration agreement signed between the General Tourism Secretariat (*Secretaría General de Turismo*) and the corporate public entity *Aeropuertos Españoles y Navegación Aérea* (Aena) in 2000, IET receives thoroughgoing monthly information on the flight- and passenger-traffic from abroad to Spanish airports. Aena's records make it possible to quantify the number of LCC flights and passengers arriving in Spain from abroad throughout the study period. Together with the number of passengers, information is also given on the flight and air company used to get to Spain, the airport of origin and the arrival airport in Spain.

- ***Encuesta de Gasto Turístico* (Egatur).** IET is responsible for running the Egatur survey as one of the Spanish tourism authority's most important instruments for keeping abreast of the characteristics and trend of foreign tourism to Spain.

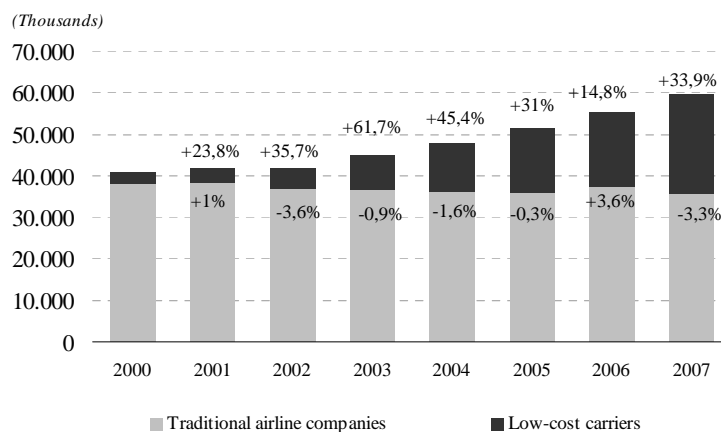
It is a continuous monthly survey included in the National Statistics Plan (*Plan Estadístico Nacional*) 2005-2008 with the number 4245: its aim is to establish the sociodemographic profile and travelling behaviour of foreign visitors arriving in Spain by road, air, rail or sea, paying special attention to their tourism expenditure on these trips. Egatur conducts a minimum of 100,000 annual border surveys of visitors leaving the country, of which 38,400 are carried out on road border-crossing points and 67,600 in Spanish airports. This survey information is grossed up monthly to the population framework provided by the Spanish Inbound Tourism Survey (*Movimientos Turísticos en Fronteras* Frontur) also run by IET, which incorporates the information provided by Aena. In 2007 Egatur conducted about

67,600 surveys on foreign tourists arriving by air, of which about 28,000 involved LCC tourists, while the remaining 36,000 arrived on traditional airline companies. This information backs up the results recorded in the report in relation to the sociodemographic profile of foreign tourists arriving by air (age, income level, professional situation, etc.), their travelling behaviour (use of internet, trip organisation method, trip purpose, type of accommodation used, etc.) and their tourism expenditure (total expenditure, average expenditure per person, average daily expenditure per person, etc.)

2. LCC Activity Trend. (Table 1)

LCC activity has grown non-stop in Spain in the last eight years: the figure of 22 thousand flight arrivals in 2000 had soared eightfold to 177 thousand by 2007. At first the traditional airline companies outnumbered LCCs by over nine flights to one. By 2004 the LCCs accounted for one fifth of the flights, rising further to three out of every ten by 2006 and almost four out of every ten flights by 2007. In general, the 5.6% growth in international flights in this period has been largely fuelled by the constant growth of LCC flights (at an annual rate of 34.2%) since traditional airline companies have not only lost out against LCCs in the total number of flights but have also suffered a 2% drop since 2000.

International passengers arriving by air, broken down by type of company. 2000-2007.



Source: Aena. Drawn up by IET from Aena figures.

In 2000 the number of passengers arriving in Spain by air was 41 million, this figure rising to 60 million by 2007. LCCs chipped in with 3 million in 2000, this figure soaring to 24 million only eight years later. This heady rise contrasts sharply with the 5.1% drop in

passengers brought by traditional airline companies. The trend of passengers arriving by air chimes in with the flight trend itself, so by 2007 four out of every ten passengers were using an LCC for flying to Spain. Likewise, both the number of LCC flights and the number of LCC passengers have increased in every year of the study period, especially in 2003 (flights by 65.4% and passengers by 61.7%). The year-by-year increases fell back slightly after 2003, recording 2006 figures slightly below the 2001 levels (13.1% increase in flights and 14.8% in passengers). It just so happens that it was precisely in the years of more modest LCC growth, in 2001 and 2006, when the number of passengers flown in by traditional airline companies grew, these being the only moments of positive growth recorded by these companies. In 2000 the flights of traditional airline companies grew by 2.9% on the 1999 figure and passengers by 1%, while in 2006 the number of flights grew slightly (1.3%) and the number of passengers by 3.6% on 2005.

In these latter years, moreover, the occupancy rate (*) of LCC flights lay between 79% and 81%, while traditional airline companies clocked up occupancy rates of between 76% and 78%, this bearing out one of the characteristic traits of LCC flights.

Low Cost Carriers are defined by a series of characteristic traits that, albeit not shared by all do distinguish them in general from the “traditional” companies.

Direct sale of their aircraft seats	They minimise the aircraft’s ground time
They issue no tickets	They maximise the route buying options (one way, return only, round trip)
They run no offices abroad	They have no business or first class
They have no customer loyalty programmes	They tend to use similar aircraft (mainly 737)
They have no onboard service	They are independent companies (from tour operators and traditional airline companies)
They pare down operational costs (on the strength of higher productivity, lower maintenance costs, type of aircraft and no agency fees, etc..)	They make no connections (prioritising point-to-point flights)
They use mainly scheduled flights	They do not market seats within package travels
They maximise flight occupancy	They use marketing strategies based almost exclusively on low fares
They maximise the use of their aircraft (making a higher number of flights per day on each aircraft)	They have no numbered seats

(*) Occupancy rate: Percentage of aircraft seats finally occupied by passengers in the flights carried out by the airline companies. It is calculated as the quotient between the total number of flight seats and the number of passengers travelling therein.

3. Air Routes

3.1. Destination Regions (Table 2)

In 2000 five of Spain's political regions (*comunidades autónomas*) accounted between them for 95.8% of LCC passenger arrivals: these five *comunidades autónomas* were also the regions with the longest standing international tourism tradition. Headed by the two archipelagos, Balearics and Canaries, this leading group also includes Andalucía (Andalusia), Catalunya (Catalonia) and the Comunidad Valenciana (Valencia Region). In 2007 these *comunidades autónomas* still headed the ranking of LCC destinations, albeit with some changes. In 2003 the Canaries fell to fifth place while, in 2004, Catalunya rose to become the top destination of international LCC passengers, boasting a higher number than the Balearics, which slipped to second place in the LCC destination ranking. Nonetheless, the 2000 concentration of passengers in these *comunidades autónomas* fell away somewhat thereafter, dropping ten percentage points to 86% by 2007. Destinations like Madrid and Murcia have climbed up the ranking in recent years, receiving 6.4% and 3.9% of passengers respectively in 2007, while their 2000 shares had been 4.1% and less than 1% respectively. Other destinations like Galicia, Castilla y León, Cantabria and Asturias have also appeared on the scene; their share is still small, less than 1%, and they have never figured as prominently as the aforementioned *comunidades autónomas* in terms of international tourism; nonetheless they have also benefited from the opening up of new LCC air routes between international airports and Spanish airports. New routes like the ones set up from the airports of Zaragoza, Asturias, Santander or Santiago de Compostela have boosted the arrival of international passengers while also fuelling a continuous increase in the number of trips made by Spanish residents abroad.

The importance of the LCCs in each destination *comunidad autónoma* has also varied over the years. In 2000 traditional companies still outperformed traditional companies but by 2007 eight of the seventeen *comunidades autónomas* received a higher proportion of LCC passengers than traditional airline passengers. In some cases, like Murcia and Cantabria, LCC arrivals accounted for over 85% of the total. Among the main destination *comunidades autónomas*, Catalunya and the Balearics received about five in every ten passengers on LCC flights, while Andalucía and the Comunidad Valenciana recorded levels of 56.2% and 66.9% respectively. Only the Canaries and the Comunidad de Madrid

(Madrid region), two of the regions with the highest proportion of air arrivals, still record a higher share of traditional airline arrivals (76.6% and 84.7% respectively).

3.2. Countries of Origin (Table 3)

A breakdown by country of origin shows a high concentration of LCC passengers in a few countries. Since 2000 three countries have accounted for the bulk of LCC passenger arrivals. Up to 2005 these countries were the UK, Germany and Holland, though their share of passengers fell from 86.4% in 2000 to 81.3% in 2003 and 76% in 2005. As from 2006 Italy became the third biggest market of origin for international LCC passengers, this year together with the United Kingdom and Germany, accounting for 72.2% of passengers, dropping to 70.4% in 2007. There is hence a certain stability in the list of the main markets, with, at the same time, a shuffling of passengers between other countries like Ireland, France and Switzerland.

3.3. Origin-destination

In recent years the most dynamic LCC air routes have been set up between, on the one hand, Germany and the UK and, on the other, the archipelagos and *comunidades autónomas* of the Mediterranean coast. The routes established between the German airports and the airports of the Balearic Islands have always recorded the highest passenger traffic, specifically between German airports like Paderborn, Münster and Dusseldorf with Palma de Mallorca, in 2000 and 2001, and others like Cologne, Hamburg, Stuttgart and also Dusseldorf since 2004. It is curious to note that no route between German and Balearic airports features among the top ten, even though Germany and the Balearics chalk up the highest LCC passenger traffic. This is because there is a broader share-out of passengers flying to the Balearics from German airports, with none standing out over the rest. The UK, for its part, has always kept up its highest passenger flows with Andalucía, especially with Málaga airport, from the airports of Luton and Gatwick and later also from Manchester. Air routes from British airports with Andalucía have always figured among the ten most active. The preferred destinations for most of the passengers from the UK were Andalucía, Canarys and the Balearics in the early years and then the Comunidad Valenciana and Catalunya. The airports of Alicante and Barcelona figure among the main destinations of the British airports of Manchester and Gatwick.

Passengers on the main air routes of low cost carriers. 2000 and 2007.

2000			2007		
Origin	Destination	Passengers	Origin	Destination	Passengers
Germany	Baleares	713,789	Germany	Baleares	2,975,775
Netherlands	Canarias	301,702	United Kingdom	Andalucía	1,931,793
Germany	Canarias	295,908	United Kingdom	C. Valenciana	1,709,090
United Kingdom	Canarias	226,189	United Kingdom	Cataluña	1,689,702
United Kingdom	Andalucía	177,571	Germany	Canarias	1,167,350

Source: Aena. Drawn up by IET from Aena figures.

4. Sociodemographic characteristics of international LCC tourists

The sociodemographic information on international visitors^(†) arriving in Spain by air, broken down by type of airline company used, has been gleaned since 2004 from the figures furnished by the *Encuesta de Gasto Turístico* (Egatur), drawn up by the *Instituto de Estudios Turísticos* (IET). Tourists account for almost 100% of visitors, so the analysis will focus on this group. In general, the personal characteristics of foreign tourists entering Spain by air have undergone few changes since 2004: neither is there any sociodemographic trait that clearly distinguishes international LCC tourists arriving in Spain from those arriving on traditional airlines. A closer analysis of the figures, however, does show some differences, especially in their level of studies.

4.1. Age and Sex (Table 4)

The gender breakdown of LCC tourists flying into Spain shows no great differences over these years, with a steady and slight majority of males. Neither are there any significant differences by type of company, perhaps with a higher proportion of males in the case of traditional airline companies.

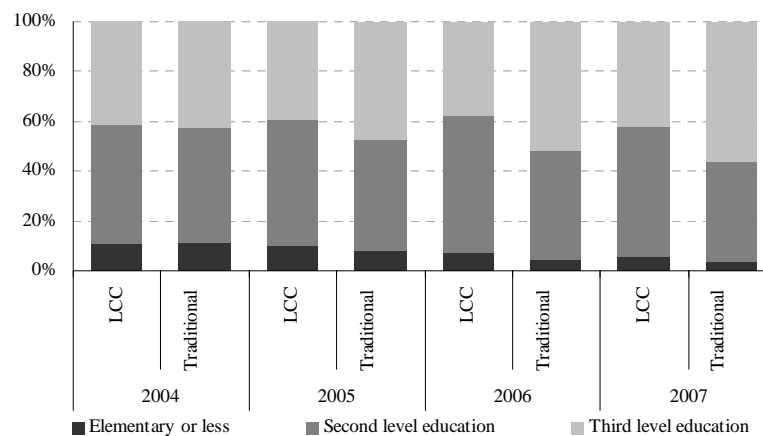
Since 2000 the highest concentration of tourists has been found in the 45 to 64 age bracket, representing about 45% of the total. The next biggest group is the 25 to 44 age bracket, accounting for about one third of the total since 2004.

^(†) Visitor: Any person travelling to a country other than his or her usual residence and outside his or her usual environment for a period of no longer than 12 months. A distinction is made between tourist, who is a visitor staying at least one night in the visited country, and same-day visitor, who does not stay overnight in the visited country. This information comes from the *Encuesta de Gasto Turístico* (Egatur).

4.2. Level of Studies (Table 5)

Most LCC tourists arriving in Spain have been educated up to secondary level: in 2004 this group accounted for 47.8% of the total, rising to 52.1% by 2007. Those with primary education or lower have been losing ground among LCC passengers, falling from 10.6% in 2004 to 5.9% in 2007. Lastly, tourists with higher education recorded similar percentages in 2007 and 2004 (42%), after lower percentages in 2005 and 2006 (39.4% and 37.7% respectively). It is here where the greatest differences are recorded between LCC tourists and those travelling on traditional airlines. Within this group the majority have received higher education (56.2% in 2007), with an increasing gap between the second-ranking group (secondary studies), building up to a 16 percentage point difference in favour of those with higher education. Only in 2004 was the number of tourists with secondary studies three percentage points higher than the group with higher education.

Breakdown of international tourists arriving by air, by level of studies. 2004 - 2007.



Source: IET. Encuesta de gasto turístico (Egatur)

4.3. Working Situation (Table 6)

Most of the LCC tourists flying into Spanish airports are employed, their percentage holding steady over the last four years (ranging from 77% to 79%). Retired people also represent a significant share of international arrivals, albeit with a falling percentage from 2004 to 2007 (12.8% as against 9.7%). A comparison of the working situation among LCCs and traditional airline companies shows that the biggest difference is recorded in the employed group, with a higher percentage in traditional companies, their share rising from 79.3% in 2004 to 82% in 2007. The percentage of retired tourists has always been lower in traditional companies than in the LCCs, likewise recording a similar fall since 2004.

5. Trip characteristics of international LCC tourists

The use of low cost carriers has often and repeatedly been linked with a type of tourist who has a good knowledge of the destination and is repeating his/her visit, often because they own their own holiday dwelling; they rarely take out a package travel and mostly come to Spain to enjoy their holidays or stay for leisure pursuits in general. The figures to hand show that some of these travelling characteristics of the international LCC tourist are different as compared to the tourist travelling on traditional companies, although in some cases the traits of LCC and traditional airline company passengers are converging towards increasing similarity.

5.1. Use of Internet (Table 7)

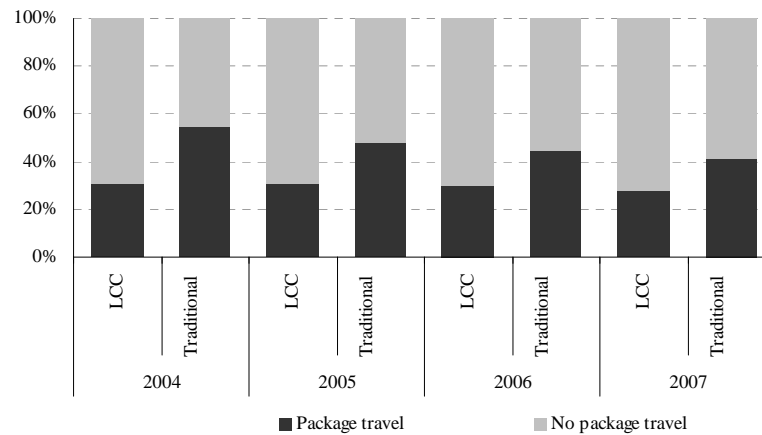
One of the main characteristics of the LCC modus operandi is the online issue of tickets and non intervention of travel agencies in the ticket purchasing processes; rather is it the tourists themselves that buy the flights on internet. Bearing these traits in mind, it stands to reason that a high percentage of international LCC tourists arriving at Spanish airports report the use of internet in the ticket purchasing process. The percentage of internet users rose from 58.1% in 2004 to 72.1% in 2007. Internet use is less widespread among tourists flying on traditional airlines, although a certain change in the travelling behaviour has been observed since 2004. In 2004 fewer than four in ten tourists reported internet use to organise their trips; by 2007 half of the tourists were using it.

5.2. Form of organising the trip (Table 8)

Package travel takeup has normally been associated with traditional airline companies and has never figured largely in LCC trips. The low rate of package travel use among LCC passengers is closely bound up with one of the distinctive traits of these companies, namely direct customer contact through the respective websites. The LCCs hardly ever work with middlemen such as tour operators or travel agencies, although some overtures have been made in recent years. These companies have stuck to this way of working over the years, with a yearly increase in the proportion of tourists not taking out a package travel, rising from 69.4% in 2004 to 72.2% in 2007. In the case of the traditional companies, the proportion of non package-tour tourists rose from 45.8% in 2004 to nearly 60% by 2007.

International tourists arriving by air, broken down by way of organising the trip.

2004 - 2007.



Source: IET. Encuesta de gasto turístico (Egatur)

5.3. Trip Purpose (Table 9)

The main purpose for international LCC tourists flying to Spain is leisure and holidays. This pattern has remained much the same for the last four years, the percentage of these trips even rising from 85.8% in 2004 to 88.1% in 2007. Next in importance come trips made for personal reasons, to visit relatives or friends, for shopping or for medical treatment, with percentages of about 6% until 2007, when professional purposes (5.7%) outstripped personally motivated trips by 1.4 percentage points. Similar behaviour has been shown over these years by tourists travelling with a traditional company; eight out of ten do so for leisure purposes while those travelling for work or business purposes have been upping their percentage (8.9% in 2004 and 12.8% in 2007). The main difference between these tourists and those using LCCs is that, in the former case, work-related trips have recorded a higher percentage than personally motivated trips every year.

5.4. Trip Accommodation (Table 10)

The most eye-catching feature in the distribution trend of LCC trips since 2004 has been the growing importance of hotel accommodation. In 2004 hotels and similar establishments were used on 57.3% of the trips, this percentage rising to 62.7% by 2007. The main reason for the higher percentage of hotel accommodation is the lower concentration of trips using rented or own dwellings; in 2004 the percentages of these two accommodation options, respectively, were 10.4% and 12.7%, dropping to 8.7% and 9.7% in 2007. Dwellings of relatives or friends make up the second most commonly used accommodation option, holding more or less steady at a trip percentage of 17%. In trips with traditional airline

companies, hotel accommodation has an even higher percentage than on LCC trips, over 70% since 2004. Other types of accommodation recorded a more or less stable performance in the period under study.

5.5. Seasonality and Average Stay (Table 11)

Most of the air trips of international tourists take place in the second and third quarter of the year, especially between July and September. The first quarter of the year, on the contrary, records the lowest activity. This pattern has held steady over the years and is also shared by the two types of airline companies. Likewise, the quarterly distribution of trips is very similar between traditional companies and the LCCs. An analysis of the quarterly share-out of trips by type of airline company shows that the LCC have been gaining ground in all quarters since 2000, especially in Q4.

Since 2004 most of the trips of international tourists arriving in Spain by air have lasted between four and fifteen nights (79.9% in 2004 and 81.1% in 2007). One of the most striking features of this period, however, has been the growing share of shorter stays, lasting from one to three nights (10.7% in 2004 and 12.5% in 2007), while stays lasting longer than fifteen nights have lost ground (falling by three percentage points on the 2004 figure). Hence the fact that the average stay, defined as the number of overnight stays per trip, has fallen in this four-year period, with a narrowing gap between the figures of the LCCs and the traditional airline companies. The 2004 figures of 9.9 nights per trip for LCCs and 9.6 for traditional companies fell to 8.8 and 8.9 nights, respectively, in 2007.

5.6. Destination Loyalty (Table 12)

As we have already seen, the main source countries of tourism to Spain by air have remained the same over the years. There is a destination loyalty among international tourists arriving in Spain with low cost companies. The percentage of those returning to the country for at least a second time grew from 85.6% in 2004 to 88.6% in 2007. Among the repeat visitors, the biggest group is those who have come to Spain ten or more times. According to the figures to hand, LCC tourists show a higher destination loyalty than tourists flying on traditional companies. Although most of the latter are also repeat visitors (80.1% in 2004 and 80.8% in 2007) they repeat less than LCC tourists, up to eight or ten percentage points less. The greatest differences are observed between those who have visited the country on most occasions.

5.7. Tourism Expenditure (Table 13)

As is well known, the total expenditure of tourists travelling on traditional airline companies is higher than those who fly to Spain on low cost carriers. But it is also true that the majority of this expenditure is spent on transport (mainly the trip itself) and especially in traditional companies. Excluding this expenditure, the spending on the other trip components, such as accommodation, restaurants, food, etc, holds steady. Although LCC tourists spend less on their air fare, therefore, in relative terms they spend more on accommodation, food purchases and eating out at restaurants than those travelling with a traditional company.

Another factor that should also be borne in mind here is the fierce fare competition in this market; the traditional airline companies often launch special offers with LCC-like fares. This price convergence is borne out by the fact that the money spent on transport used to be four times higher among traditional airline tourists and has now dropped to only double.

Since 2004 there has been a constant growth in the arrival of international tourists on low cost carriers, both in absolute and relative terms. There has also been a concomitant rise in the expenditure of this class of tourist, but the relative growth in their spending has not matched their growth in numbers. In 2004 LCC tourists represented 22.5% of the total and their spending represented 19.1%, while by 2007 the number of LCC tourists had grown to 40.6% of the total and their expenditure only to 34.2% of total spending.

If the expenditure is broken down into its various components, we see that the spending on transport is the highest, followed by spending on a package travel. As we have already seen, most of the LCC tourists do not take out a package travel (73%); if expenditure on this item is excluded, accommodation would be the second biggest expenditure item. In the years under study transport expenditure accounted for about 24% of the total, while accommodation expenditure has risen from 16% to 19.7%; this is mainly due to the increase of over 100% since 2004 in the number of LCC tourists using hotel accommodation.

The total per capita spending, in relation to the trip duration, peaked in 2004 at €43.6. After an 8% fall in 2005 the next year saw a 6% growth, the expenditure figure then levelling out in 2007. Moreover, the average daily expenditure of LCC tourists has

increased in this period, in relation to the reduction in the average stay, rising from €3.9 to €1.5.

Summary

- The growth of LCC activity in Spain has been constant since 2000. The increase in the number of trips has been matched by a concomitant increase in the number of passengers, at an average annual rate of 34%.
- LCC activity continues to favour the arrival of international tourists to the country's most traditional tourism *comunidades autónomas*: the archipelagos and Mediterranean *comunidades autónomas*. But it has also facilitated the arrival of tourists at spots with less of an international tourism tradition. As of today, eight of the seventeen *comunidades autónomas* receive over half their air passengers on an LCC.
- The typical LCC tourist is aged between 45 and 64, has secondary education and is employed.
- The LCC trip characteristics have been changing since 2004, evolving towards a greater use of internet and a lower package travel take-up. Leisure and work-related trips have gained ground and the use of hotel accommodation has become more widespread, with a concomitant increase in accommodation expenditure, although fare expenditure remains the biggest single item.

6. Annex of Tables

Table 1. International passengers arriving by air, flights and occupancy rate. 2000 – 2007

		Passengers	Vertical percentage	Annual growth (%)	Flights	Vertical percentage	Annual growth (%)	Flight's occupancy rate
2000	Traditional airline companies	37,880,400	7.4	-	22,576	7.0	-	-
	LCC	3,007,412	92.6	-	297,897	93.0	-	-
	Total	40,887,812	100.0	-	320,473	100.0	-	-
2001	Traditional airline companies	38,266,970	8.9	23.8	27,632	8.3	22.4	-
	LCC	3,722,380	91.1	1.0	306,414	91.7	2.9	-
	Total	41,989,350	100.0	2.7	334,046	100.0	4.2	-
2002	Traditional airline companies	36,896,583	12.0	35.7	38,391	11.4	38.9	-
	LCC	5,052,910	88.0	-3.6	299,123	88.6	-2.4	-
	Total	41,949,493	100.0	-0.1	337,514	100.0	1.0	-
2003	Traditional airline companies	36,566,765	18.3	61.7	63,487	17.5	65.4	78.8
	LCC	8,169,521	81.7	-0.9	299,045	82.5	0.0	76.9
	Total	44,736,286	100.0	6.6	362,532	100.0	7.4	77.2
2004	Traditional airline companies	35,995,315	24.8	45.4	91,162	23.5	43.6	81.2
	LCC	11,876,741	75.2	-1.6	297,036	76.5	-0.7	76.6
	Total	47,872,056	100.0	7.0	388,198	100.0	7.1	77.7
2005	Traditional airline companies	35,874,718	30.2	31.0	117,186	28.5	28.5	81.4
	LCC	15,558,067	69.8	-0.3	293,457	71.5	-1.2	76.5
	Total	51,432,785	100.0	7.4	410,643	100.0	5.8	77.9
2006	Traditional airline companies	37,176,722	32.4	14.8	132,569	30.9	13.1	81.1
	LCC	17,853,266	67.6	3.6	297,126	69.1	1.3	78.0
	Total	55,029,988	100.0	7.0	429,695	100.0	4.6	79.0
2007	Traditional airline companies	35,940,533	39.9	33.9	176,831	37.7	33.4	80.2
	LCC	23,906,824	60.1	-3.3	292,082	62.3	-1.7	77.3
	Total	59,847,357	100.0	8.8	468,913	100.0	9.1	78.4

Source: Aena. Drawn up by IET from Aena figures

Table 2. International passengers arriving on low cost carriers, broken down by destination region (*comunidad autónoma*). 2000 – 2007

		Passengers	Vertical percentage	Annual growth (%)
2000	Cataluña	382,581	12.7	
	Balears (Illes)	982,687	32.7	
	Andalucía	500,306	16.6	
	C. Valenciana	273,452	9.1	
	Madrid (C. de)	124,038	4.1	
	Canarias	743,307	24.7	
	Rest of regions	1,041	0.0	
2001	Cataluña	499,566	13.4	30.6
	Balears (Illes)	1,280,978	34.4	30.4
	Andalucía	633,946	17.0	26.7
	C. Valenciana	342,855	9.2	25.4
	Madrid (C. de)	199,701	5.4	61.0
	Canarias	764,220	20.5	2.8
	Rest of regions	1,114	0.0	7.0
2002	Cataluña	946,236	18.7	89.4
	Balears (Illes)	1,523,681	30.2	18.9
	Andalucía	947,703	18.8	49.5
	C. Valenciana	422,875	8.4	23.3
	Madrid (C. de)	354,777	7.0	77.7
	Canarias	841,217	16.6	10.1
	Rest of regions	16,421	0.3	1,374.1
2003	Cataluña	1,814,811	22.2	91.8
	Balears (Illes)	2,050,251	25.1	34.6
	Andalucía	1,482,502	18.1	56.4
	C. Valenciana	1,103,357	13.5	160.9
	Madrid (C. de)	450,396	5.5	27.0
	Canarias	1,003,944	12.3	19.3
	Rest of regions	264,260	3.2	1,509.3
2004	Cataluña	3,077,184	25.9	69.6
	Balears (Illes)	2,882,810	24.3	40.6
	Andalucía	1,952,472	16.4	31.7
	C. Valenciana	1,641,093	13.8	48.7
	Madrid (C. de)	503,007	4.2	11.7
	Canarias	1,145,955	9.6	14.1
	Rest of regions	674,220	5.7	155.1
2005	Cataluña	3,794,907	24.4	23.3
	Balears (Illes)	3,458,876	22.2	20.0
	Andalucía	2,705,758	17.4	38.6
	C. Valenciana	2,479,333	15.9	51.1
	Madrid (C. de)	772,387	5.0	53.6
	Canarias	1,217,164	7.8	6.2
	Rest of regions	1,129,642	7.3	67.5
2006	Cataluña	4,292,407	24.0	13.1
	Balears (Illes)	3,918,337	21.9	13.3
	Andalucía	3,067,116	17.2	13.4
	C. Valenciana	2,759,171	15.5	11.3
	Madrid (C. de)	1,142,679	6.4	47.9
	Canarias	1,340,698	7.5	10.1
	Rest of regions	1,332,858	7.5	18.0
2007	Cataluña	5,851,711	24.5	36.3
	Balears (Illes)	5,082,659	21.3	29.7
	Andalucía	3,615,786	15.1	17.9
	C. Valenciana	3,432,345	14.4	24.4
	Madrid (C. de)	2,232,857	9.3	95.4
	Canarias	2,192,084	9.2	63.5
	Rest of regions	1,499,382	6.3	12.5

Source: Aena. Drawn up by IET from Aena figures

Table 3. International passengers arriving on low cost carriers, broken down by country of origin. 2000 – 2007

		Passengers	Vertical percentage	Annual growth (%)
2000	United Kingdom	1,190,490	39.6	
	Germany	649,736	21.6	
	Italy	40,197	1.3	
	Netherlands	759,256	25.2	
	Other countries	367,733	12.2	
2001	United Kingdom	1,683,149	45.2	41.4
	Germany	782,468	21.0	20.4
	Italy	78,323	2.1	94.8
	Netherlands	760,160	20.4	0.1
	Other countries	418,280	11.2	13.7
2002	United Kingdom	1,882,816	37.3	11.9
	Germany	1,276,616	25.3	63.2
	Italy	157,360	3.1	100.9
	Netherlands	846,700	16.8	11.4
	Other countries	889,418	17.6	112.6
2003	United Kingdom	2,588,296	31.7	37.5
	Germany	3,144,098	38.5	146.3
	Italy	370,612	4.5	135.5
	Netherlands	906,000	11.1	7.0
	Other countries	1,160,515	14.2	30.5
2004	United Kingdom	3,427,089	28.9	32.4
	Germany	4,802,649	40.4	52.8
	Italy	765,687	6.4	106.6
	Netherlands	959,850	8.1	5.9
	Other countries	1,921,466	16.2	65.6
2005	United Kingdom	4,003,500	25.7	16.8
	Germany	6,779,001	43.6	41.2
	Italy	1,005,887	6.5	31.4
	Netherlands	1,040,054	6.7	8.4
	Other countries	2,729,625	15.3	42.1
2006	United Kingdom	4,231,902	23.7	5.7
	Germany	7,326,423	41.0	8.1
	Italy	1,326,767	7.4	31.9
	Netherlands	1,262,971	7.1	21.4
	Other countries	3,705,203	20.8	35.7
2007	United Kingdom	6,236,755	26.1	47.4
	Germany	8,233,979	34.4	12.4
	Italy	2,360,679	9.9	77.9
	Netherlands	1,584,088	6.6	25.4
	Other countries	5,491,323	23.0	48.2

Source: Aena. Drawn up by IET from Aena figures

Table 4. International tourists arriving by air, broken down by age. 2004 - 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	Age 0 - 15	387.307	4,3	1.471.034	5,0	1.858.341	4,8
	Age 15 - 24	902.473	10,0	2.815.558	9,5	3.718.031	9,7
	Age 25 - 44	4.082.799	45,4	13.787.953	46,7	17.870.752	46,4
	Age 45 - 64	2.779.240	30,9	8.957.109	30,3	11.736.349	30,5
	Age 64 and over	846.153	9,4	2.493.269	8,4	3.339.422	8,7
2005	Age 0 - 15	615.632	5,1	1.411.376	4,9	2.027.008	5,0
	Age 15 - 24	1.042.368	8,6	2.432.354	8,5	3.474.722	8,5
	Age 25 - 44	5.244.641	43,4	12.673.831	44,2	17.918.472	44,0
	Age 45 - 64	4.110.531	34,0	9.575.940	33,4	13.686.471	33,6
	Age 64 and over	1.065.375	8,8	2.557.782	8,9	3.623.157	8,9
2006	Age 0 - 15	867.335	5,7	1.333.621	4,9	2.200.956	5,2
	Age 15 - 24	1.460.578	9,6	2.034.880	7,5	3.495.458	8,2
	Age 25 - 44	6.329.171	41,5	12.449.970	45,8	18.779.142	44,2
	Age 45 - 64	5.122.469	33,6	9.114.924	33,5	14.237.393	33,5
	Age 64 and over	1.483.583	9,7	2.248.758	8,3	3.732.341	8,8
2007	Age 0 - 15	1.031.515	5,5	1.298.897	5,1	2.330.412	5,3
	Age 15 - 24	1.976.593	10,6	2.112.284	8,2	4.088.877	9,2
	Age 25 - 44	8.324.545	44,7	12.100.610	47,1	20.425.155	46,1
	Age 45 - 64	5.738.245	30,8	8.354.633	32,5	14.092.878	31,8
	Age 64 and over	1.547.678	8,3	1.839.011	7,2	3.386.689	7,6

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 5. International tourists arriving by air, broken down by level of studies. 2004 – 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	Elementary or less	949.599	10,6	3.353.417	11,4	4.303.016	11,2
	Second level education	4.302.915	47,8	13.519.122	45,8	17.822.037	46,3
	Third level education	3.745.458	41,6	12.652.384	42,9	16.397.842	42,6
2005	Elementary or less	1.243.099	10,3	2.399.909	8,4	3.643.008	8,9
	Second level education	6.077.745	50,3	12.780.640	44,6	18.858.384	46,3
	Third level education	4.757.705	39,4	13.470.733	47,0	18.228.438	44,8
2006	Elementary or less	1.039.334	6,8	1.198.828	4,4	2.238.162	5,3
	Second level education	8.472.471	55,5	11.908.732	43,8	20.381.203	48,0
	Third level education	5.751.331	37,7	14.074.594	51,8	19.825.925	46,7
2007	Elementary or less	1.097.300	5,9	1.056.557	4,1	2.153.856	4,9
	Second level education	9.699.779	52,1	10.210.654	39,7	19.910.434	44,9
	Third level education	7.821.497	42,0	14.438.224	56,2	22.259.721	50,2

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 6. International tourists arriving by air, broken down by working situation. 2004 - 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	Employed	6.892.309	76,6	23.404.716	79,3	30.297.024	78,6
	Student	565.028	6,3	1.582.683	5,4	2.147.711	5,6
	Retired	1.147.581	12,8	3.005.791	10,2	4.153.372	10,8
	Houseworker	277.138	3,1	1.069.312	3,6	1.346.450	3,5
	Unemployed	51.681	0,6	245.691	0,8	297.372	0,8
	Others	64.236	0,7	216.731	0,7	280.967	0,7
2005	Employed	9.550.941	79,1	22.906.945	80,0	32.457.886	79,7
	Student	594.986	4,9	1.370.765	4,8	1.965.751	4,8
	Retired	1.350.730	11,2	2.924.520	10,2	4.275.250	10,5
	Houseworker	433.941	3,6	1.014.786	3,5	1.448.727	3,6
	Unemployed	73.509	0,6	317.176	1,1	390.684	1,0
	Others	74.441	0,6	117.090	0,4	191.531	0,5
2006	Employed	11.944.416	78,3	22.095.487	81,3	34.039.903	80,2
	Student	793.988	5,2	1.286.300	4,7	2.080.289	4,9
	Retired	1.714.318	11,2	2.575.094	9,5	4.289.412	10,1
	Houseworker	621.858	4,1	959.013	3,5	1.580.871	3,7
	Unemployed	98.178	0,6	146.924	0,5	245.103	0,6
	Others	90.378	0,6	119.335	0,4	209.712	0,5
2007	Employed	14.730.929	79,1	21.077.890	82,0	35.808.819	80,8
	Student	1.180.628	6,3	1.311.875	5,1	2.492.503	5,6
	Retired	1.812.738	9,7	2.090.833	8,1	3.903.571	8,8
	Houseworker	685.684	3,7	979.653	3,8	1.665.337	3,8
	Unemployed	97.186	0,5	127.178	0,5	224.364	0,5
	Others	111.411	0,6	118.006	0,5	229.417	0,5

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 7. International tourists arriving by air, broken down by way of organising the trip. 2004 - 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	Package travel	2.752.754	30,6	15.992.316	54,2	18.745.070	48,7
	No package travel	6.245.218	69,4	13.532.607	45,8	19.777.825	51,3
2005	Package travel	3.663.628	30,3	13.626.047	47,6	17.289.675	42,4
	No package travel	8.414.920	69,7	15.025.235	52,4	23.440.155	57,6
2006	Package travel	4.574.836	30,0	12.050.492	44,3	16.625.328	39,2
	Not package travel	10.688.300	70,0	15.131.662	55,7	25.819.962	60,8
2007	Package travel	5.172.922	27,8	10.600.187	41,2	15.773.109	35,6
	No package travel	13.445.654	72,2	15.105.248	58,8	28.550.902	64,4

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 8. International tourists arriving by air, broken down by use of internet. 2004 – 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	Uses internet	5.231.483	58,1	11.533.551	39,1	16.765.034	43,5
	Doesn't use internet	3.766.489	41,9	17.991.373	60,9	21.757.862	56,5
2005	Uses internet	7.326.816	60,7	10.817.640	37,8	18.144.456	44,5
	Doesn't use internet	4.751.733	39,3	17.833.642	62,2	22.585.375	55,5
2006	Uses internet	9.723.543	63,7	11.198.159	41,2	20.921.702	49,3
	Doesn't use internet	5.539.593	36,3	15.983.995	58,8	21.523.588	50,7
2007	Uses internet	13.430.164	72,1	12.803.471	49,8	26.233.635	59,2
	Doesn't use internet	5.188.412	27,9	12.901.964	50,2	18.090.376	40,8

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 9. International tourists arriving by air, broken down by trip purpose. 2004 - 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	Holidays, leisure	7.716.883	85,8	24.685.260	83,6	32.402.143	84,1
	Business and professional	482.484	5,4	2.633.601	8,9	3.116.085	8,1
	Education and training	104.380	1,2	427.599	1,4	531.979	1,4
	Personal *	549.462	6,1	1.251.949	4,2	1.801.410	4,7
	Others	144.763	1,6	526.515	1,8	671.278	1,7
2005	Holidays, leisure	10.489.804	86,8	23.589.451	82,3	34.079.254	83,7
	Business and professional	567.623	4,7	3.009.465	10,5	3.577.088	8,8
	Education and training	84.346	0,7	326.634	1,1	410.980	1,0
	Personal *	799.042	6,6	1.239.891	4,3	2.038.933	5,0
	Others	137.734	1,1	485.841	1,7	623.575	1,5
2006	Holidays, leisure	13.462.342	88,2	22.380.421	82,3	35.842.763	84,4
	Business and professional	675.802	4,4	3.067.243	11,3	3.743.045	8,8
	Education and training	103.193	0,7	306.833	1,1	410.026	1,0
	Personal *	844.697	5,5	1.045.787	3,8	1.890.484	4,5
	Others	177.102	1,2	381.870	1,4	558.971	1,3
2007	Holidays, leisure	16.402.113	88,1	20.995.705	81,7	37.397.817	84,4
	Business and professional	1.060.557	5,7	3.286.877	12,8	4.347.433	9,8
	Education and training	128.340	0,7	283.735	1,1	412.075	0,9
	Personal *	805.969	4,3	795.349	3,1	1.601.318	3,6
	Others	221.598	1,2	343.769	1,3	565.366	1,3

*Personal includes: Visiting relatives or friends, medical treatment and shopping.

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 10. International tourists arriving by air, broken down by accommodation type.

2004 – 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	Private tourism accommodation	3.841.879	42,7	7.617.569	25,8	11.459.447	29,7
	Dwellings rented	936.692	10,4	1.992.231	6,7	2.928.923	7,6
	Owned dwellings	1.146.056	12,7	1.896.729	6,4	3.042.786	7,9
	Accommodation provided without charge by relatives or friends	1.492.813	16,6	2.986.504	10,1	4.479.317	11,6
	Others	266.317	3,0	742.105	2,5	1.008.422	2,6
	Hotels and similar establishments	5.156.094	57,3	21.907.354	74,2	27.063.448	70,3
2005	Private tourism accommodation	5.048.635	41,8	7.689.005	26,8	12.737.640	31,3
	Dwellings rented	1.165.614	9,7	2.257.360	7,9	3.422.974	8,4
	Owned dwellings	1.327.442	11,0	1.733.295	6,0	3.060.737	7,5
	Accommodation provided without charge by relatives or friends	2.271.862	18,8	3.038.870	10,6	5.310.732	13,0
	Others	283.717	2,3	659.480	2,3	943.197	2,3
	Hotels and similar establishments	7.029.913	58,2	20.962.277	73,2	27.992.190	68,7
2006	Private tourism accommodation	6.314.730	41,4	7.434.965	27,4	13.749.695	32,4
	Dwellings rented	1.604.772	10,5	2.127.458	7,8	3.732.230	8,8
	Owned dwellings	1.699.494	11,1	1.637.074	6,0	3.336.568	7,9
	Accommodation provided without charge by relatives or friends	2.649.142	17,4	3.008.229	11,1	5.657.371	13,3
	Others	361.322	2,4	662.205	2,4	1.023.526	2,4
	Hotels and similar establishments	8.948.406	58,6	19.747.189	72,6	28.695.595	67,6
2007	Private tourism accommodation	6.939.071	37,3	6.531.483	25,4	13.470.554	30,4
	Dwellings rented	1.618.478	8,7	1.824.811	7,1	3.443.289	7,8
	Owned dwellings	1.812.500	9,7	1.443.675	5,6	3.256.175	7,3
	Accommodation provided without charge by relatives or friends	3.065.152	16,5	2.686.770	10,5	5.751.921	13,0
	Others	442.942	2,4	576.227	2,2	1.019.170	2,3
	Hotels and similar establishments	11.679.505	62,7	19.173.952	74,6	30.853.456	69,6

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 11. International tourists arriving by air, broken down by trip duration. 2004 – 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	1 to 3 nights	964.419	10,7	3.107.699	10,5	4.072.118	10,6
	4 to 15 nights	7.193.421	79,9	24.372.086	82,5	31.565.508	81,9
	15 nights and over	840.131	9,3	2.045.138	6,9	2.885.270	7,5
2005	1 to 3 nights	1.265.878	10,5	3.337.170	11,6	4.603.048	11,3
	4 to 15 nights	9.958.957	82,5	22.755.140	79,4	32.714.096	80,3
	15 nights and over	853.714	7,1	2.558.972	8,9	3.412.686	8,4
2006	1 to 3 nights	1.500.108	9,8	3.397.725	12,5	4.897.833	11,5
	4 to 15 nights	12.673.805	83,0	21.865.859	80,4	34.539.663	81,4
	15 nights and over	1.089.224	7,1	1.918.570	7,1	3.007.793	7,1
2007	1 to 3 nights	2.294.130	12,3	3.164.193	12,3	5.458.323	12,3
	4 to 15 nights	15.101.171	81,1	20.890.327	81,3	35.991.498	81,2
	15 nights and over	1.223.275	6,6	1.650.915	6,4	2.874.190	6,5

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 12. International tourists arriving by air, broken down by destination loyalty.

2004 – 2007

		Low-cost carriers		Traditional airline companies		Total	
		Tourists	Vertical percentage	Tourists	Vertical percentage	Tourists	Vertical percentage
2004	First time	1.295.282	14,4	5.862.115	19,9	7.157.396	18,6
	Not the first time	7.702.691	85,6	23.662.808	80,1	31.365.499	81,4
	Once	396.007	4,4	1.557.714	5,3	1.953.722	5,1
	Twice	700.189	7,8	2.463.642	8,3	3.163.832	8,2
	Three times	790.250	8,8	2.687.297	9,1	3.477.547	9,0
	4 to 6 times	1.822.069	20,2	6.175.101	20,9	7.997.169	20,8
	7 to 9 times	861.947	9,6	2.325.900	7,9	3.187.847	8,3
	10 times and over	3.132.229	34,8	8.453.154	28,6	11.585.382	30,1
2005	First time	1.540.126	12,8	6.249.271	21,8	7.789.397	19,1
	Not the first time	10.538.422	87,2	22.402.011	78,2	32.940.433	80,9
	Once	362.534	3,0	1.295.809	4,5	1.658.343	4,1
	Twice	837.131	6,9	1.937.441	6,8	2.774.572	6,8
	Three times	997.602	8,3	2.417.674	8,4	3.415.275	8,4
	4 to 6 times	2.521.740	20,9	6.068.713	21,2	8.590.454	21,1
	7 to 9 times	1.458.028	12,1	2.430.690	8,5	3.888.718	9,5
	10 times and over	4.361.387	36,1	8.251.684	28,8	12.613.072	31,0
2006	First time	1.894.283	12,4	5.314.331	19,6	7.208.615	17,0
	Not the first time	13.368.853	87,6	21.867.822	80,4	35.236.675	83,0
	Once	537.237	3,5	1.180.424	4,3	1.717.661	4,0
	Twice	1.196.380	7,8	2.137.297	7,9	3.333.676	7,9
	Three times	1.220.389	8,0	2.615.699	9,6	3.836.087	9,0
	4 to 6 times	3.116.482	20,4	5.906.665	21,7	9.023.147	21,3
	7 to 9 times	1.681.651	11,0	2.419.466	8,9	4.101.117	9,7
	10 times and over	5.616.714	36,8	7.608.272	28,0	13.224.986	31,2
2007	First time	2.130.949	11,4	4.941.718	19,2	7.072.668	16,0
	Not the first time	16.487.627	88,6	20.763.716	80,8	37.251.343	84,0
	Once	831.400	4,5	1.501.554	5,8	2.332.954	5,3
	Twice	1.632.373	8,8	2.578.987	10,0	4.211.360	9,5
	Three times	1.951.721	10,5	2.849.685	11,1	4.801.407	10,8
	4 to 6 times	4.217.774	22,7	5.484.844	21,3	9.702.618	21,9
	7 to 9 times	1.694.542	9,1	1.951.446	7,6	3.645.988	8,2
	10 times and over	6.159.817	33,1	6.397.200	24,9	12.557.017	28,3

Source: IET. Encuesta de Gasto Turístico (EGATUR)

Table 13. Expenditure of international tourists arriving by air (€). 2004 - 2007

		Total expenditure (millions)	Expenditure by person	Daily expenditure by person
2004	Traditional airline companies	31,046.2	843.6	83.9
	LCC	7,590.7	1,051.5	103.0
	Total	38,636.8	1,003.0	98.6
2005	Traditional airline companies	31,082.7	775.8	82.8
	LCC	9,371.0	1,084.9	107.1
	Total	40,453.7	993.2	100.3
2006	Traditional airline companies	29,167.6	823.0	87.1
	LCC	12,561.4	1,073.0	108.4
	Total	41,729.0	983.1	100.9
2007	Traditional airline companies	28,185.7	823.1	91.5
	LCC	15,324.2	1,096.5	113.5
	Total	43,509.8	981.6	104.6

Source: IET. Encuesta de Gasto Turístico (EGATUR)