

SPAIN

MARKET PROFILE

2024



INBOUND TOURISTS

The island of Ireland welcomed around 263,000 Spanish tourists who spent over €233/£203 million and stayed 2.4 million nights. Spain was the island's fifth-largest source of overseas tourists and nights, and the seventh-largest source of revenue.



WHERE DID OUR TOURISTS COME FROM?

The majority (74%) of Spanish tourists came from Barcelona (27%), the South (23%), Madrid (13%) and North-East (12%).

Barcelona	South	Madrid	North East	East	Centre	Canaries / Balearics	North-West	North-Centre
27%	23%	13%	12%	9%	7%	4%	3%	2%

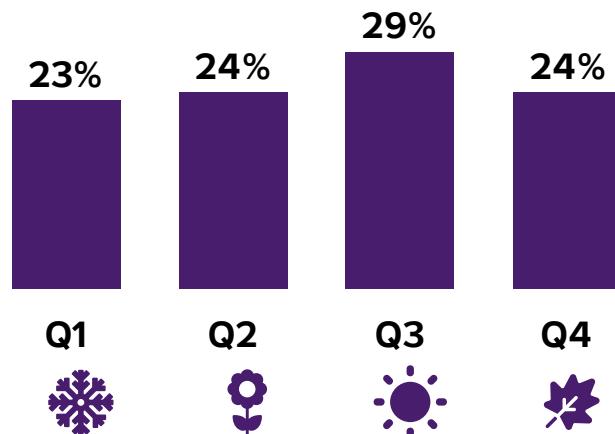
WHERE DID OUR TOURISTS VISIT?



*Visits to Ireland and Northern Ireland total more than the island figure due to tourists overnighting in both.

WHEN DID OUR TOURISTS VISIT?

Over-half (53%) of Spanish tourists visited the island during Q3 and Q4 (July - December).



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Two-fifths (42%) of Spanish tourists visiting the island of Ireland came for a holiday, generating 35% of Spanish tourism revenue. Around one-in-seven (14%) were visiting for "other" reasons and they accounted for the second-largest share (32%) of Spanish tourism revenue.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€82/£72m	35%	110k	42%	633k	26%
 VFR	€40/£35m	17%	84k	32%	667k	28%
 BUSINESS	€35/£31m	15%	33k	12%	271k	11%
 OTHER	€75/£66m	32%	37k	14%	848k	35%

HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average, Spanish tourists spent €887/£771 per trip or €96/£84 per night and stayed 9.2 nights on the island of Ireland.

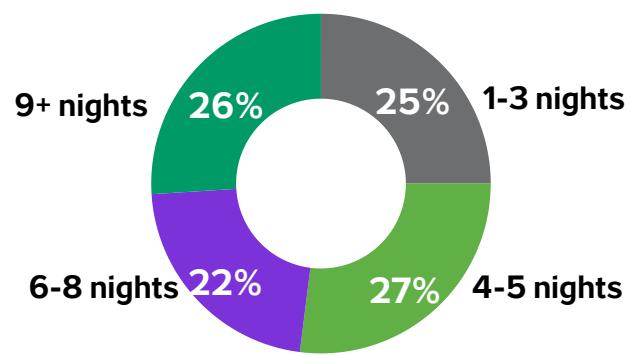
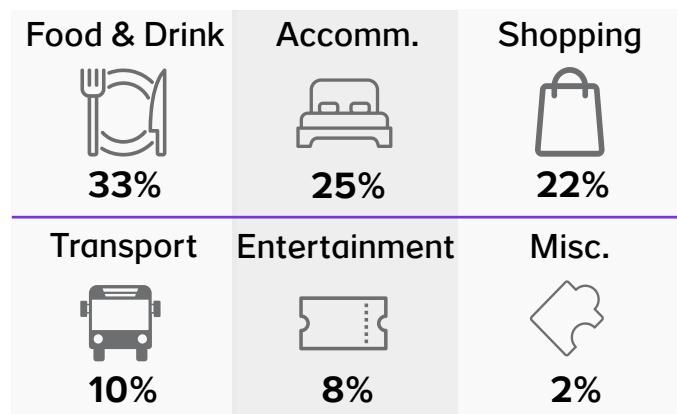


HOW DID OUR TOURISTS SPEND THEIR MONEY?

A third (33%) of Spanish tourists' revenue was spent on food and drink.

HOW LONG DID OUR TOURISTS STAY?

Three-quarter (75%) stayed four or more nights on the island of Ireland.



INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

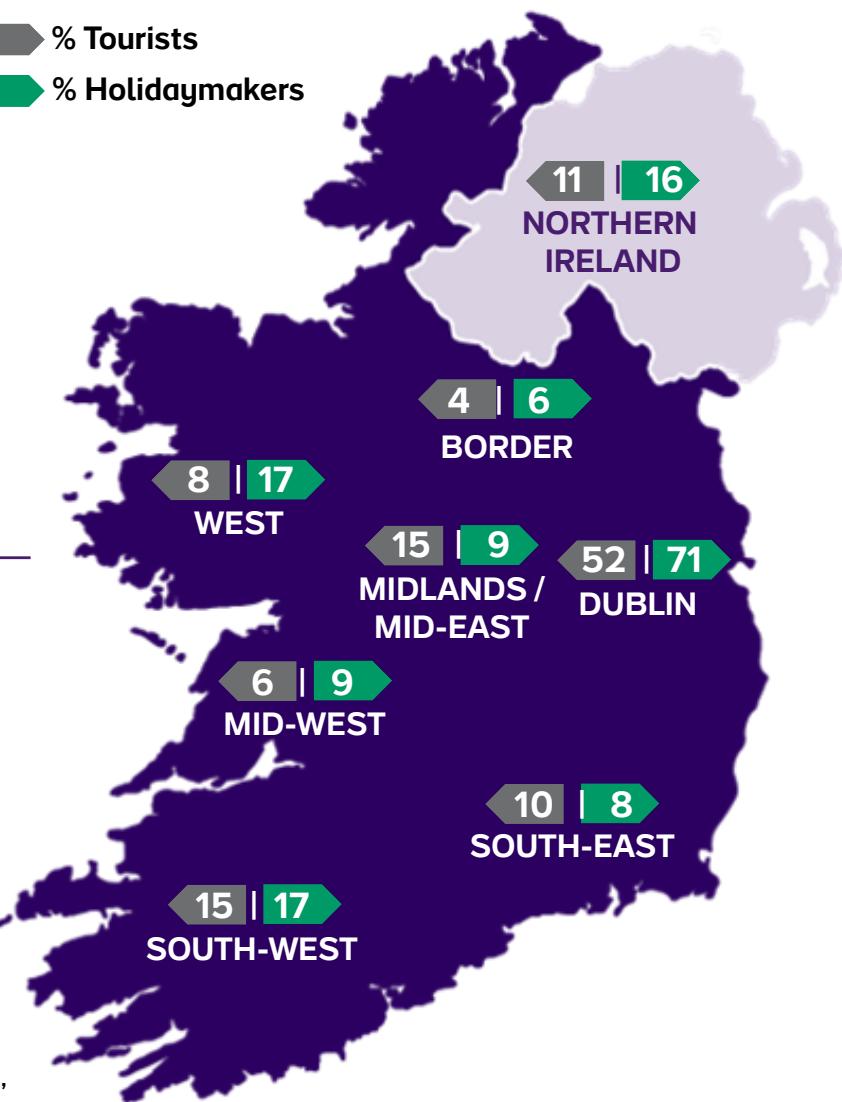
Dublin and the South-West were the most popular regions for Spanish tourists and holidaymakers.

Over 13,000 Spanish tourists and 10,000 holidaymakers included an overnight on both sides of the border.

➤ % Tourists
➤ % Holidaymakers

Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	South-West
#3	Midlands / Mid-East	West

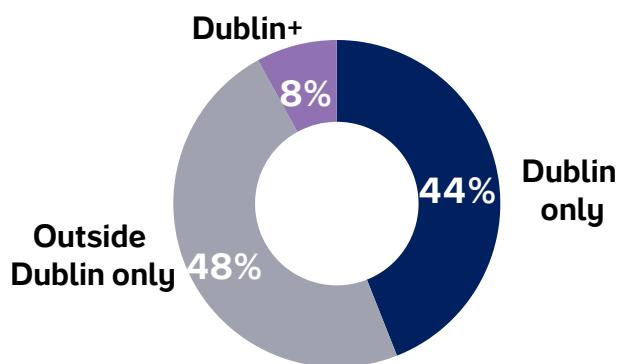
Dublin: Dublin City and County. Midlands / Mid-East: Laois, Longford, Louth, Offaly, Westmeath, Kildare, Meath, Wicklow.
 South-East: Carlow, Kilkenny, Waterford, Wexford.
 South-West: Cork, Kerry.
 Mid-West: Clare, Limerick, Tipperary.
 West: Galway, Mayo, Roscommon. Border: Cavan, Donegal, Leitrim, Monaghan, Sligo.
 Northern Ireland: Antrim, Armagh, Down, Fermanagh, Derry/Londonderry, Tyrone



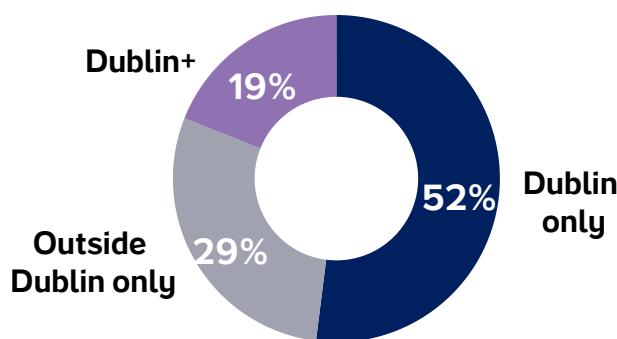
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Spanish tourists (52%) and holidaymakers (71%).

TOURISTS



HOLIDAYMAKERS



INBOUND HOLIDAYMAKERS

Spain was the island of Ireland's ninth-largest source of holiday revenue, the sixth-largest source of holidaymakers and the seventh-largest contributor to holiday nights. Spanish holidaymakers spent €751/£653 per trip (or €130/£113 per night) and stayed on average 5.8 nights.



€82/£72m

holiday revenue

#9

global rank



110k

holiday trips

#7

global rank



633k

holiday nights

#10

global rank



**€751/£653 (IOI)
£264 (NI)**

Av. spend per trip



**€130/£113 (IOI)
£92 (NI)**

Av. spend per night

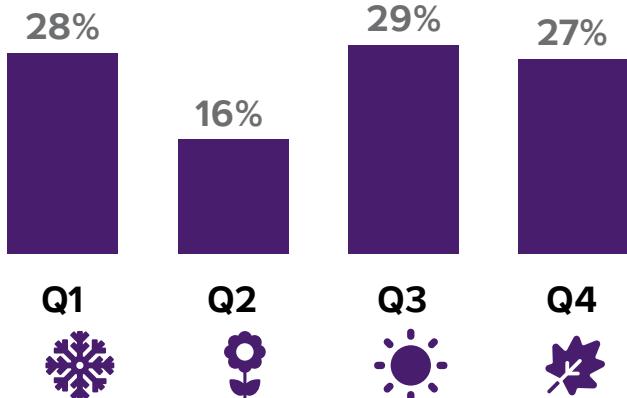


**5.8 (IOI)
2.9 (NI)**

Av. stay (nights)

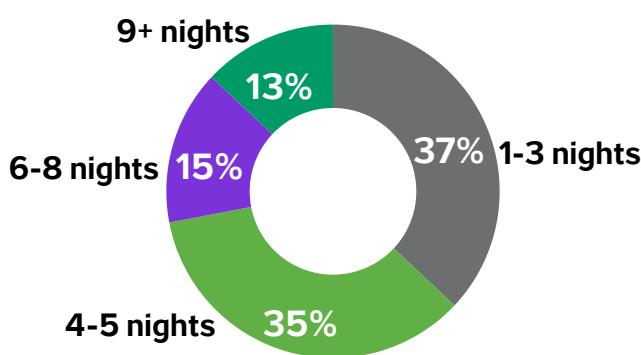
WHEN DID OUR HOLIDAYMAKERS VISIT?

More than half (55%) of Spanish holidaymakers visited the island of Ireland in Q1 or Q4 (January - March and October - December).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

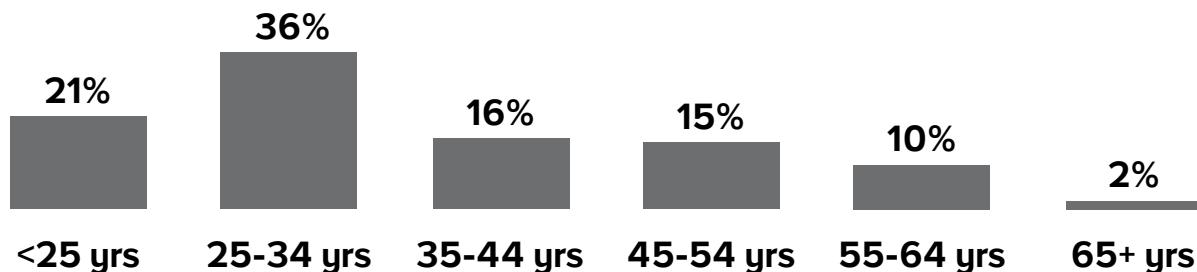
The majority (72%) of Spanish holidaymakers stayed up to five nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

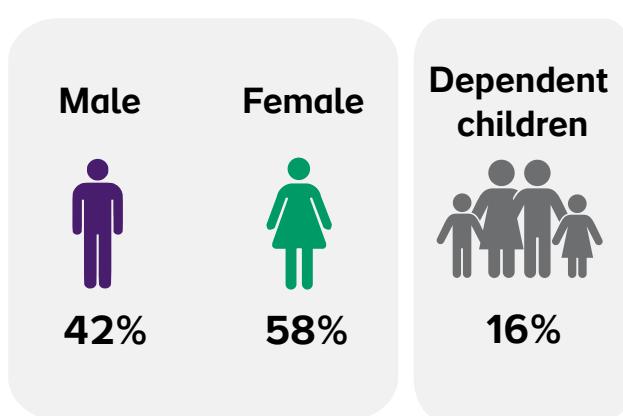
WHAT AGE WERE OUR HOLIDAYMAKERS?

Around six-in-ten (57%) Spanish holidaymakers were under 35 years old.



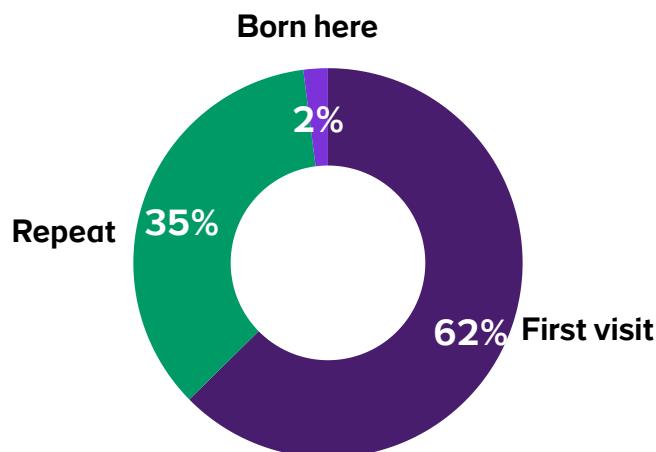
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Around three-fifths (58%) Spanish holidaymakers were female. One-sixth (16%) of Spanish holidaymakers had dependent children in the household.



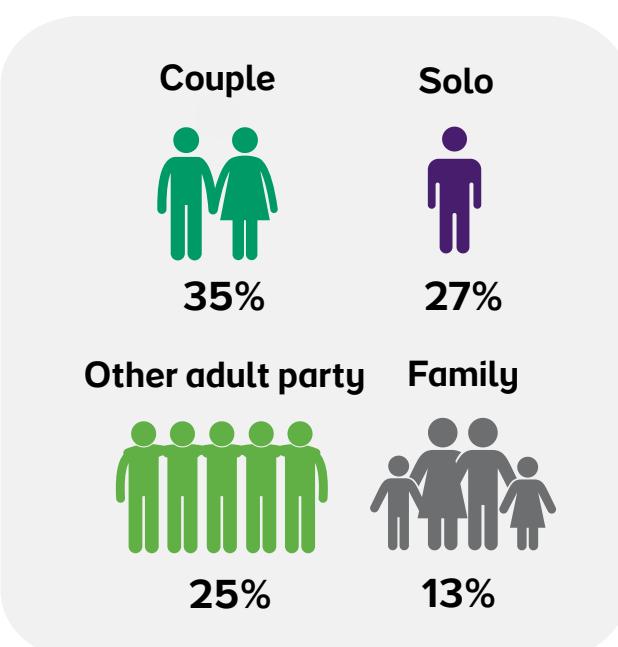
HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit for around three-fifths (62%) of Spanish holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

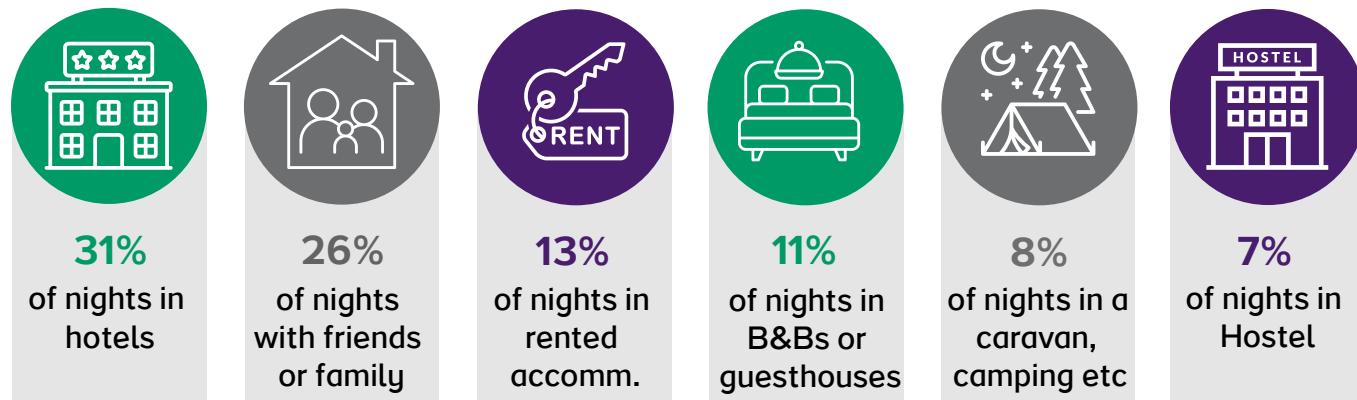
Around one-third (35%) travelled as part of a couple. Around a quarter travelled alone (27%) and a further one quarter travelled with an "other adult party".



INBOUND HOLIDAYMAKERS

WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (56%) of nights spent by Spanish holidaymakers were in hotels (31%) or with friends and family (26%).



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

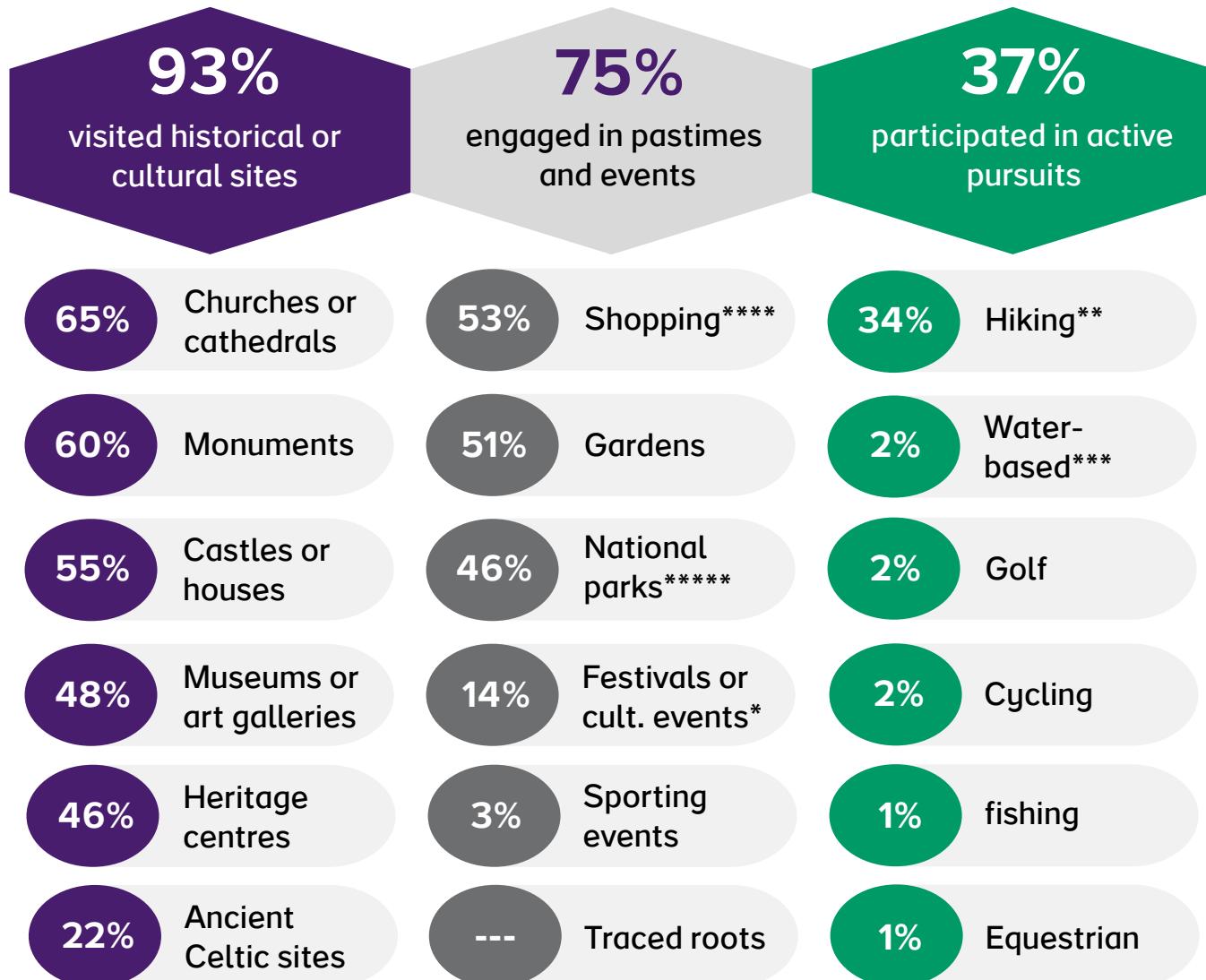
The majority (97%) of Spanish holidaymakers travelled independently and a quarter (28%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

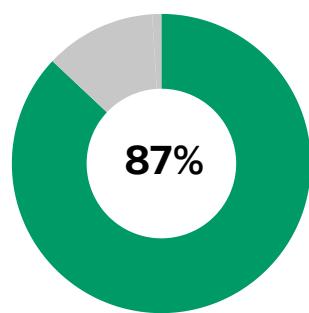
Spanish holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*incl. concerts | **incl. cross country walking | ***excl. fishing and swimming | ****excl. food/drink/souvenirs | *****incl. forests

LIKELIHOOD TO RECOMMEND A HOLIDAY IN IRELAND TO OTHERS

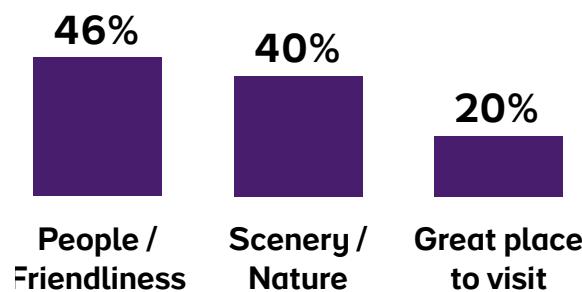
The vast majority (87%) of Spanish holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (46%), the scenery and nature (40%) and that it's generally a great place to visit (20%).



Promoters (9 - 10) "highly recommend"

On a scale of 0 to 10, how likely would you be to recommend a holiday in Ireland to others?
0 = definitely not recommend
10 = definitely recommend

Promoters - Top 3 reasons



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Spain use multiple sources of inspiration when choosing their holiday destination, including family and friends' recommendations, online search and travel websites.

While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.

Online search (45%) was the most important source for researching and planning a holiday

Over a third (35%) use destination websites to research and plan a trip

DREAMING



47% family and friends' recommendations



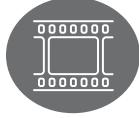
41% online search



31% travel websites*



30% guidebooks



22% destination website



19% social media



17% films, TV shows, travel shows

RESEARCH AND PLANNING



50% online search



39% travel websites*



37% destination websites



35% guidebooks



31% family and friends' recommendations



20% travel articles, blogs



15% social media

*Travel websites include company websites and booking platforms

ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of Spanish
outbound
holidaymakers



WHO ARE THE ENRICHMENT EXPLORERS AS PEOPLE?

Embracing a lifestyle centred around exploration, they exude passion and consistently seek fresh experiences. They place emphasis on human connection which extends to their travels, with great importance placed on engaging with local communities. They have a wide variety of hobbies and interests, with learning and experiencing new things high on their priority list – even during their free time on holiday.

WHAT DO THEY LOOK FOR ON A HOLIDAY?

Passionate about travelling, these holidaymakers enjoy going off the tourist trail to get the most authentic experience. Regardless of the destination, Enrichment Explorers aspire to immerse themselves in the country's richness, exploring wildlife and nature and discovering their passion for art, history and culture.

They are less likely to have children and most likely to travel with a partner

TOP 10 HOLIDAY NEEDS

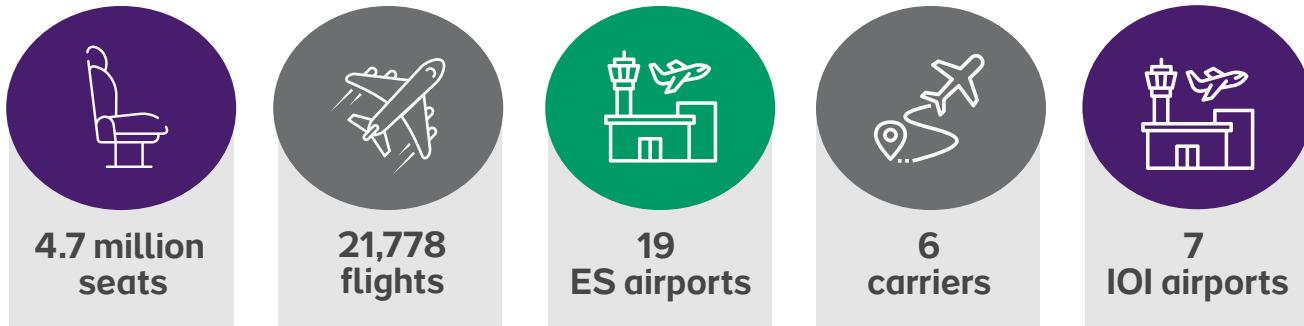
1		To feel connected to nature	6		To experience living like a local
2		To broaden and stimulate my mind	7		To enjoy authentic moments with friendly locals
3		To feel the character of the place and people	8		To be transported back in history
4		To appreciate historical/modern architecture	9		To discover and explore somewhere new
5		To experience the vibrancy of the place and people	10		To enjoy the beauty of the landscape

OUTBOUND TOURISTS

Spain was the world's twelfth-largest outbound market in 2024 and 78% of all outbound trips from Spain were to other parts of Europe.

ACCESS BY AIR

There were 4.7 million direct one-way air seats available on almost 22,000 flights from Spain to the island of Ireland in 2024. There were 19 gateways from Spain to airports on the island of Ireland.



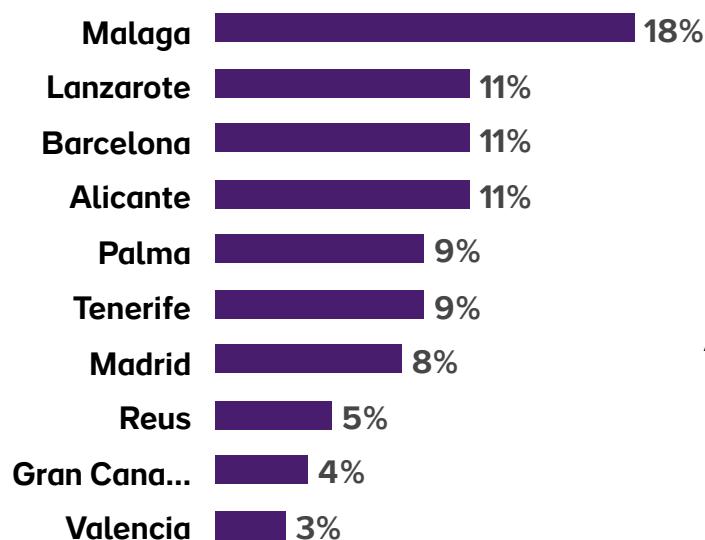
WHERE CAN OUR TOURISTS FLY FROM?

The top ten Spanish airports accounted for the majority (87%) of seats in 2024. Malaga accounted for nearly one-in-five (18%) seats.

WHO CAN OUR TOURISTS FLY WITH?

Seven carriers operated between Spain and the island of Ireland. In 2024, Ryanair was responsible for delivering almost three-fifths (58%) of seats to the island of Ireland.

Share of seats by airport (Top 10)



Share of seats by carrier

