



SPAIN

MARKET PROFILE 2025

INBOUND TOURISTS

The island of Ireland welcomed 251,000 Spanish tourists, who spent over €201/£175 million and stayed 2.2 million nights in 2025. This makes Spain the island's fifth-largest source of overseas tourists, the seventh-largest source of nights and the eighth-largest source of overseas revenue.

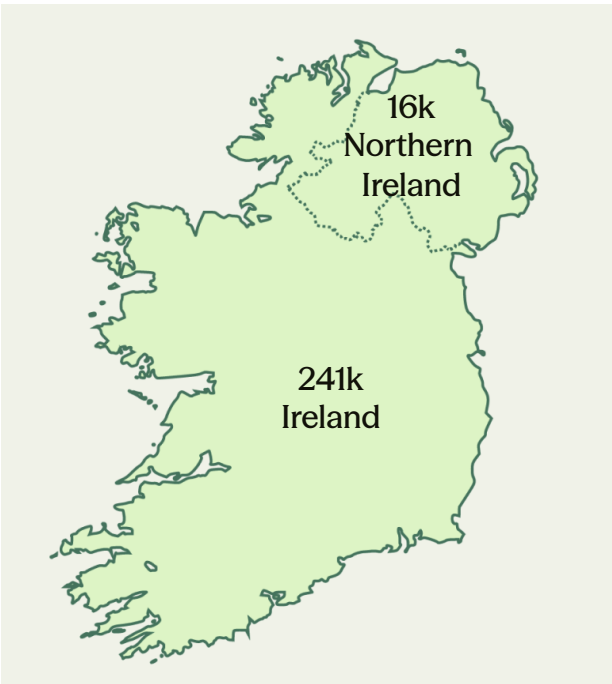


WHERE DID OUR TOURISTS COME FROM?

Spanish tourists visiting the island of Ireland in 2025 are concentrated in Spain's largest urban regions, led by the South, Barcelona and Madrid, which together account for over 60% of visitors.

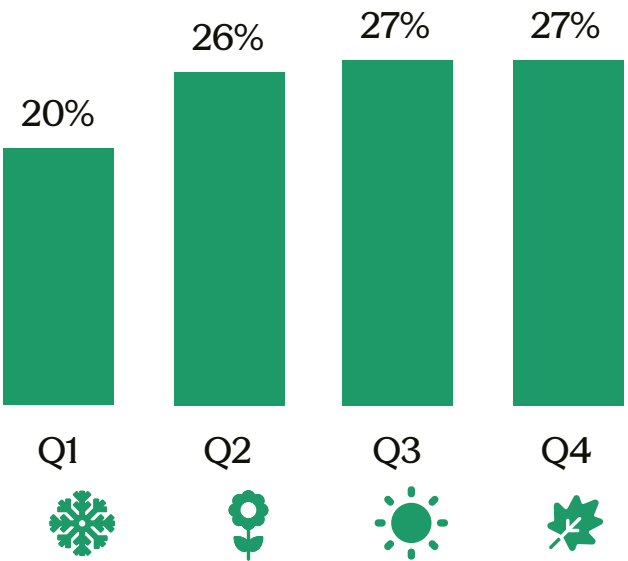
South	Barcelona	Madrid	North-East	North-Centre	East	Centre	North-West
24%	21%	16%	10%	9%	8%	8%	3%

WHERE DID OUR TOURISTS VISIT?



WHEN DID OUR TOURISTS VISIT?

Spanish tourists' visits to the island of Ireland are relatively evenly spread across the year, aside from a quieter Q1 (Jan–Mar).



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Over one-third (36%) of Spanish tourists visiting the island of Ireland in 2025 came for a holiday, accounting for 35% of Spanish tourism revenue. Around 15% were visiting for "other" reasons (including learning English as a foreign language) and they accounted for the second-largest share (30%) of Spanish tourism revenue.

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€71/£62m	35%	91k	36%	509k	23%
	VFR	€37/£33m	19%	89k	35%	596k	27%
	BUSINESS	€32/£28m	16%	35k	14%	282k	13%
	OTHER	€91/£53m	30%	37k	15%	782k	36%

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

In 2025, Spanish tourists stayed an average of 8.7 nights on the island of Ireland and spent €803/£698 per trip, equivalent to €93/£75 per night.



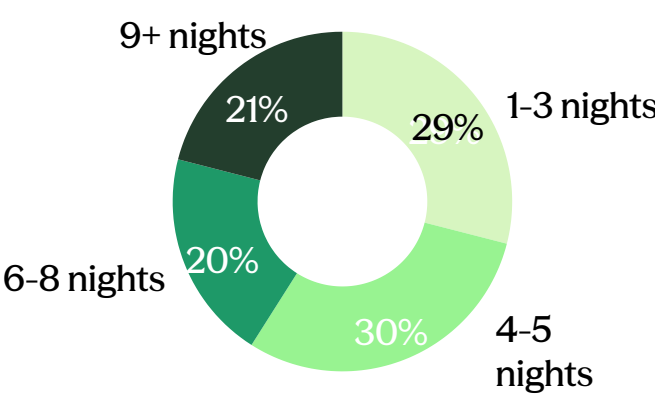
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink accounted for the largest share of Spanish tourist spend, at 33%, ahead of accommodation and all other trip costs.

Food & drink	Accomm.	Shopping
		
33%	24%	21%
Transport	Entertainment	Misc.
		
11%	10%	1%

HOW LONG DID OUR TOURISTS STAY?

Almost three-quarters (71%) visited the island of Ireland for four or more nights.



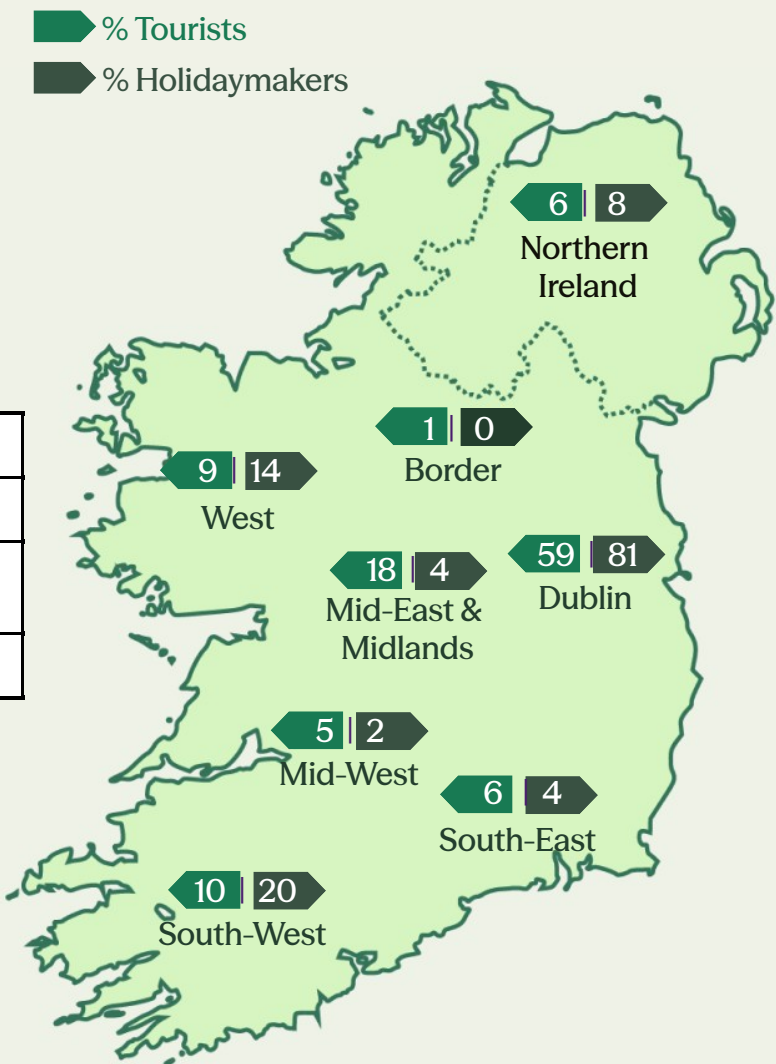
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was the most popular area for both Spanish tourists and holidaymakers.

Almost 6,000 Spanish tourists and 4,000 holidaymakers overnighted on both sides of the border.

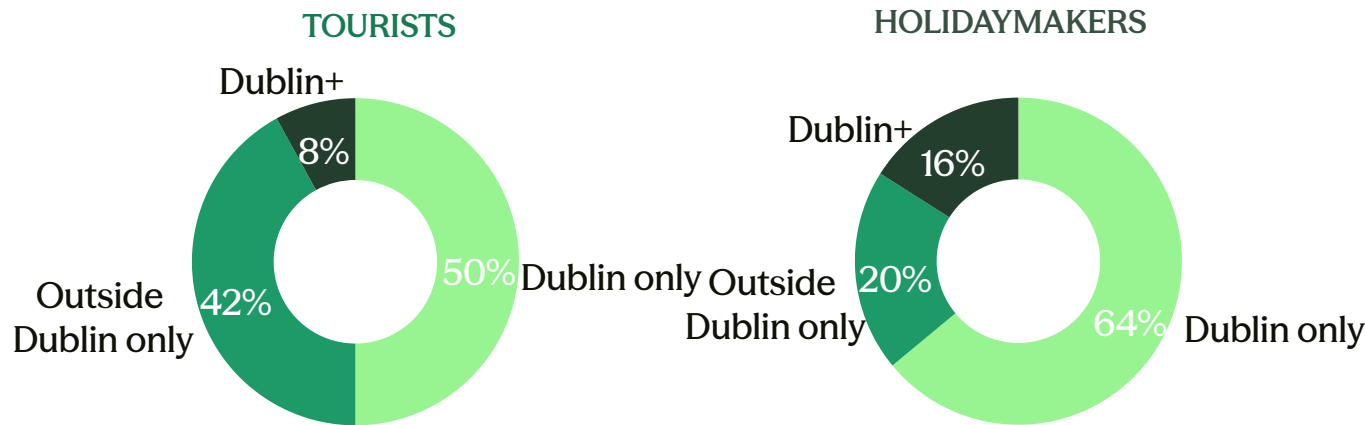
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	Mid-East & Midlands	South-West
3	South-West	West



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 (58%) and holidaymakers (81%).



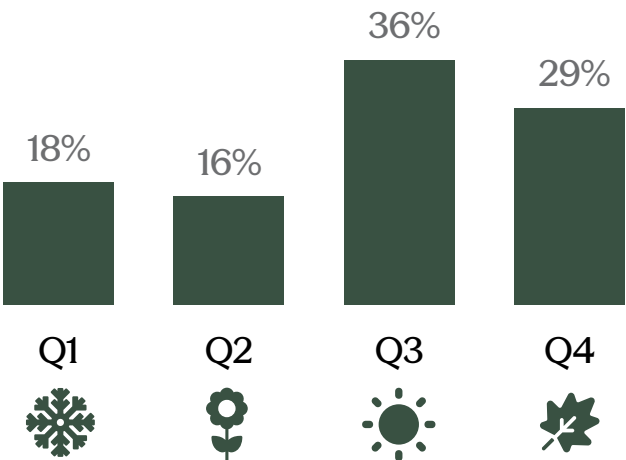
INBOUND HOLIDAYMAKERS

Spain was the island of Ireland’s seventh-largest source of holidaymakers and the ninth-largest source of holiday nights and holiday revenue. Spanish holidaymakers stayed for an average of 5.6 nights on the island of Ireland. Those visiting Northern Ireland stayed for an average of 3.2 nights.



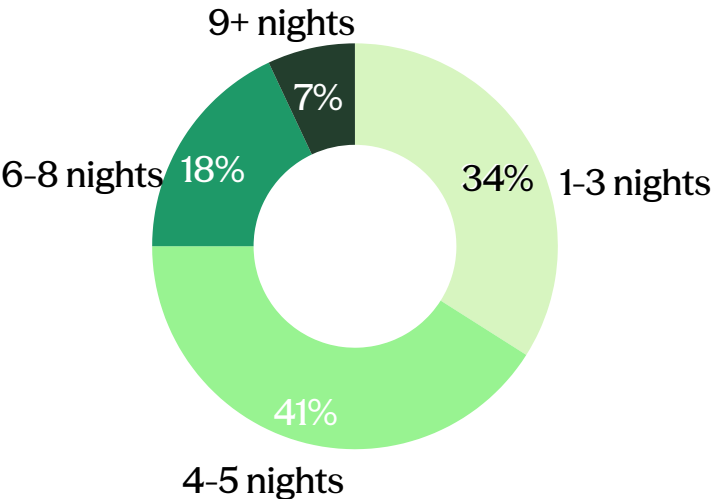
WHEN DID OUR HOLIDAYMAKERS VISIT?

Spanish holiday travel to the island of Ireland peaks in the second half of the year, with Q3 (July–September) being the busiest quarter.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

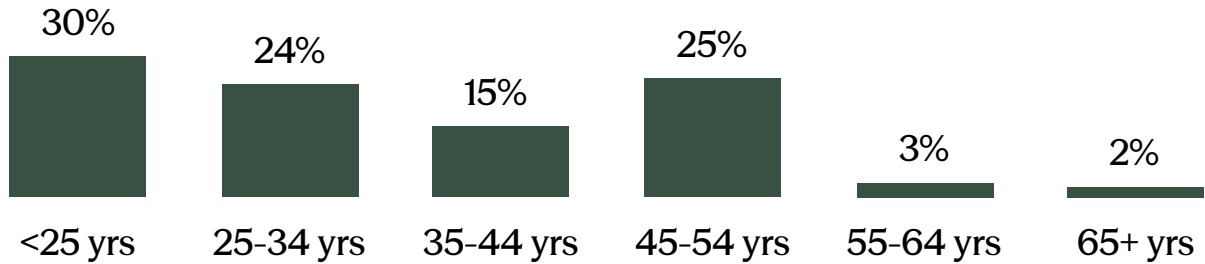
The majority (75%) of Spanish holidaymakers stayed up to five nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT AGE WERE OUR HOLIDAYMAKERS?

Almost all (95%) Spanish holidaymakers visiting the island of Ireland in 2025 were under 55.

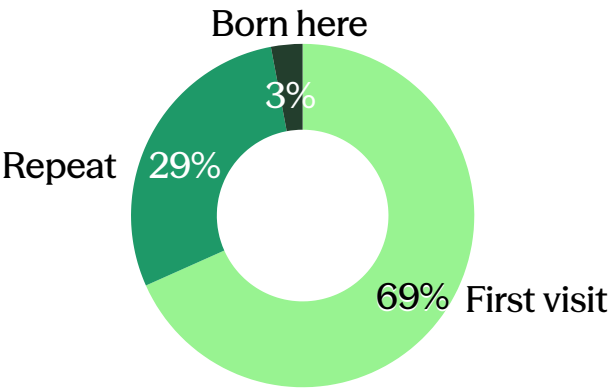
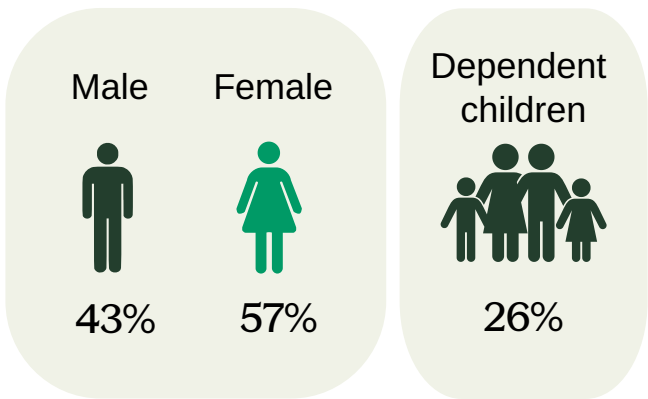


HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

Around one in four (26%) Spanish holidaymakers visiting the island of Ireland had dependent children in their household.

HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

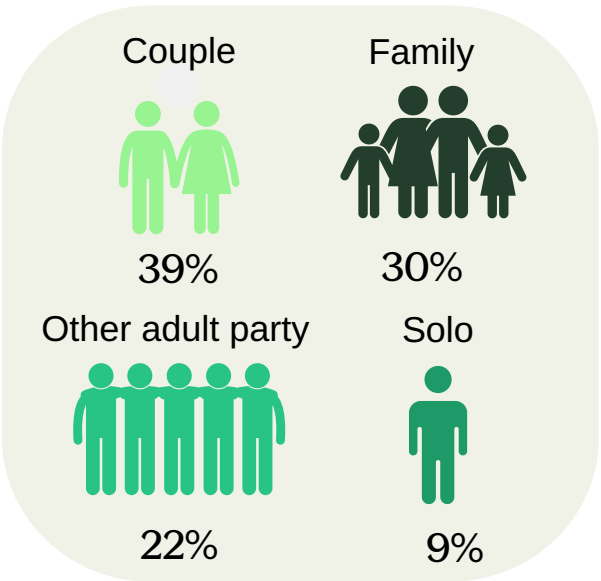
It was a first visit for the majority (69%) of Spanish holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Around two-fifths (39%) of Spanish holidaymakers visited the island of Ireland with their partner/ spouse.

Three in ten (30%) travelled with family.

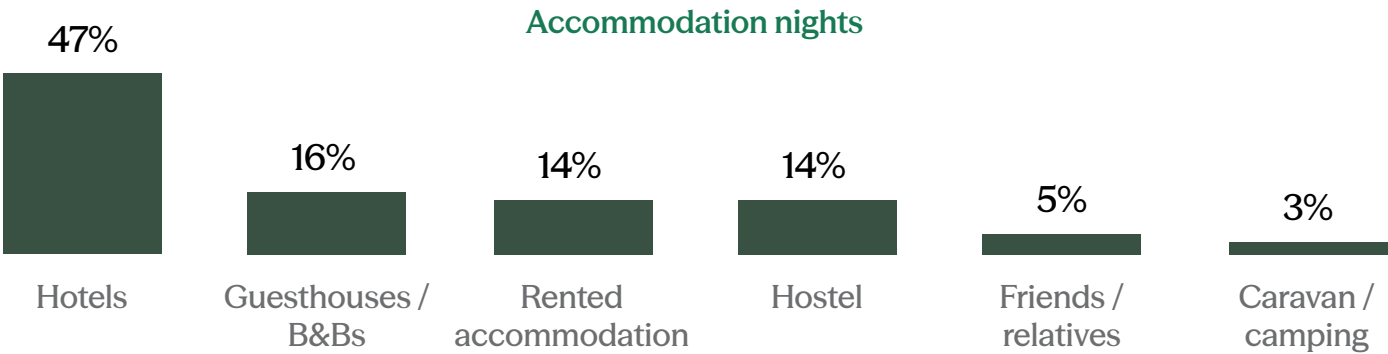


*Survey of Overseas Travellers only

INBOUND HOLIDAYMAKERS

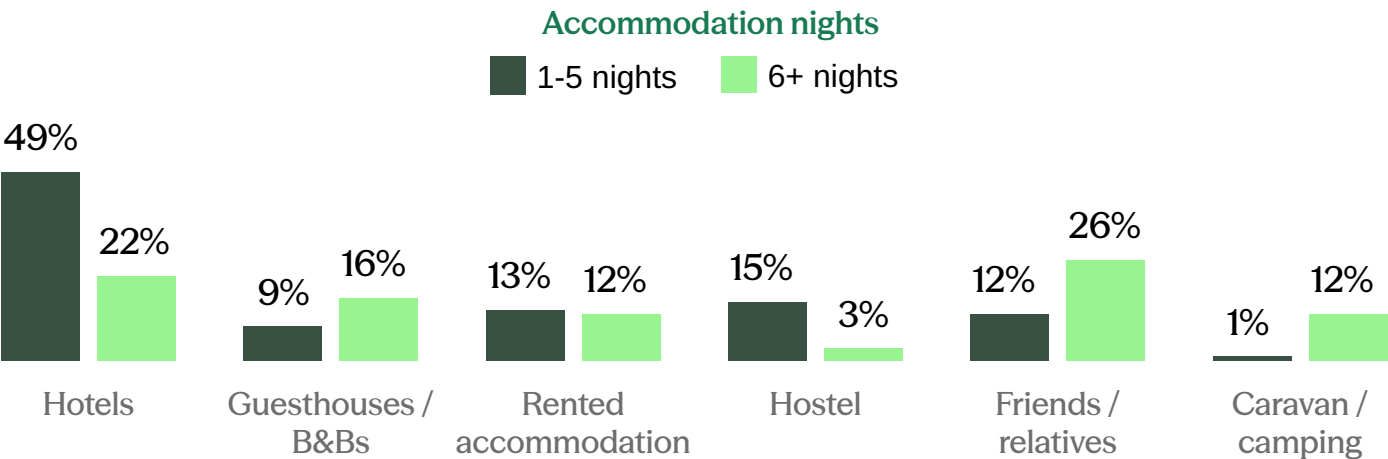
WHERE DID OUR HOLIDAYMAKERS STAY?

Hotels accounted for almost half (47%) of nights spent by Spanish holidaymakers, followed by guesthouses/B&Bs (16%). Rented accommodation and hostels each accounted for about one in seven nights.



HOW DID ACCOMMODATION CHOICE VARY BY LENGTH OF STAY?*

Hotels were especially popular among Spanish holidaymakers (49%) on short breaks (1–5 nights), while staying with friends and family, guesthouses/B&Bs and camping were more popular among longer-staying holidaymakers.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?*

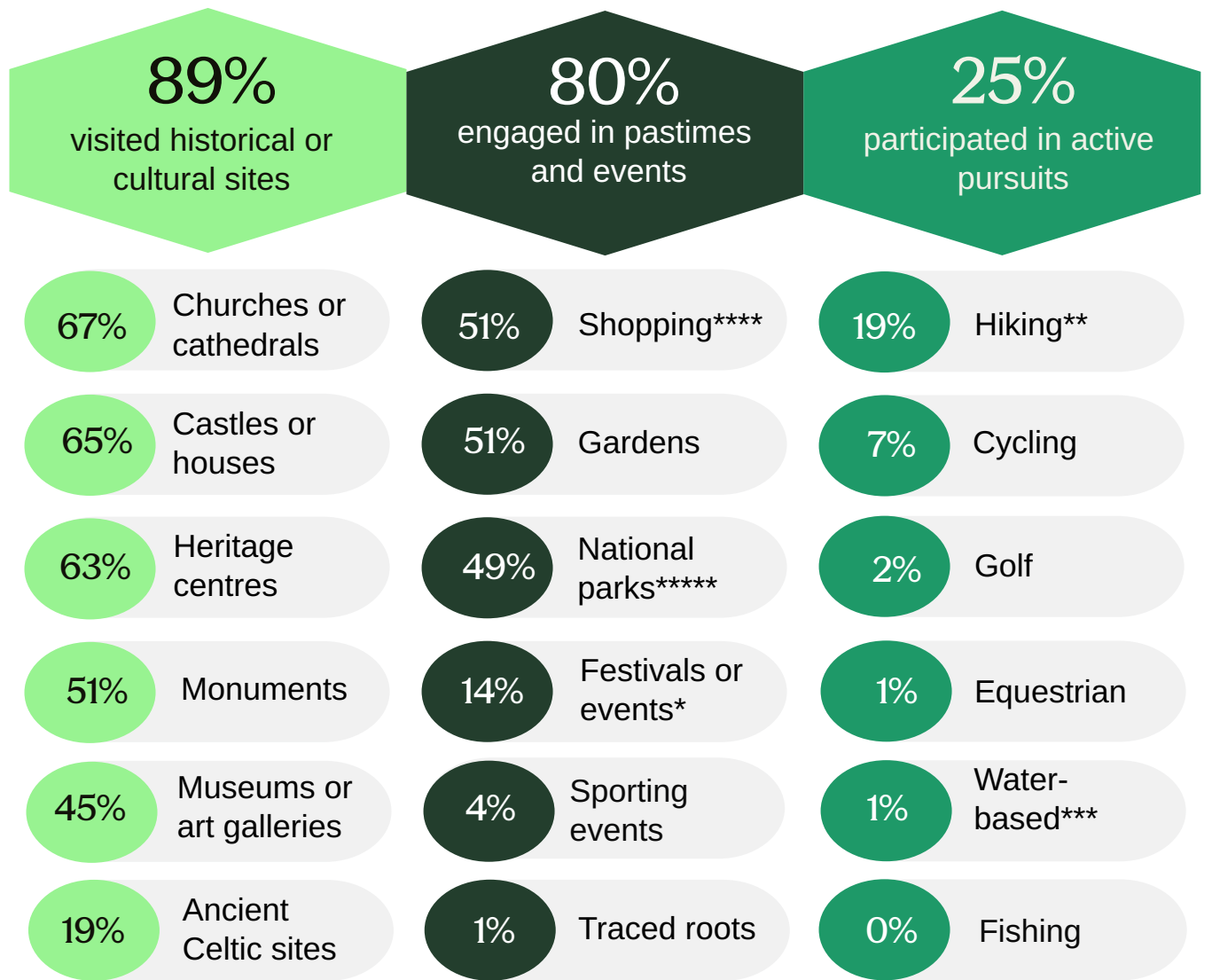
The majority (98%) of Spanish holidaymakers travelled independently and almost one in four (29%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

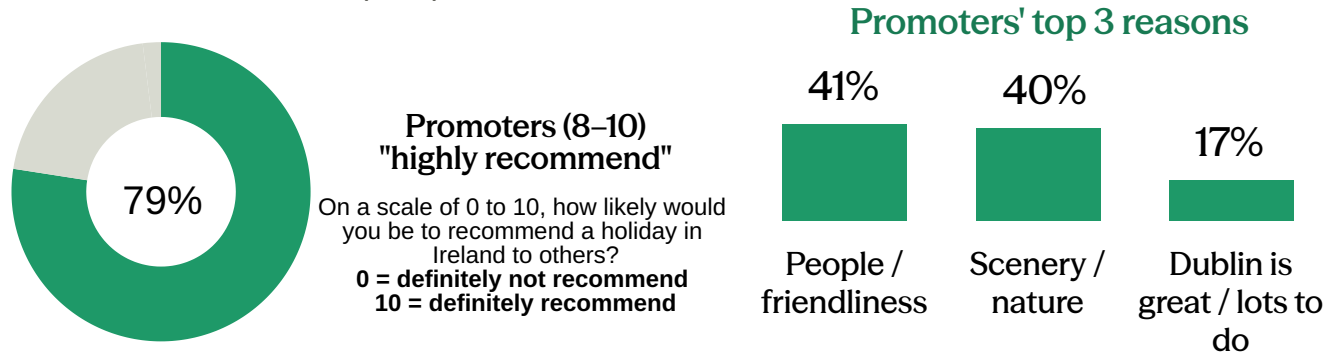
Spanish holidaymakers are engaged tourists. They explored our historical sites and engaged in multiple pastimes while on the island of Ireland.



*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 majority (79%) of Spanish holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (41%), our scenery and nature (40%) and, to a lesser extent, to visit Dublin (17%).



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Spain use multiple sources of inspiration when choosing a holiday destination, including family and friends' recommendations and general online searches.

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.

One in two were inspired by recommendations from family and friends

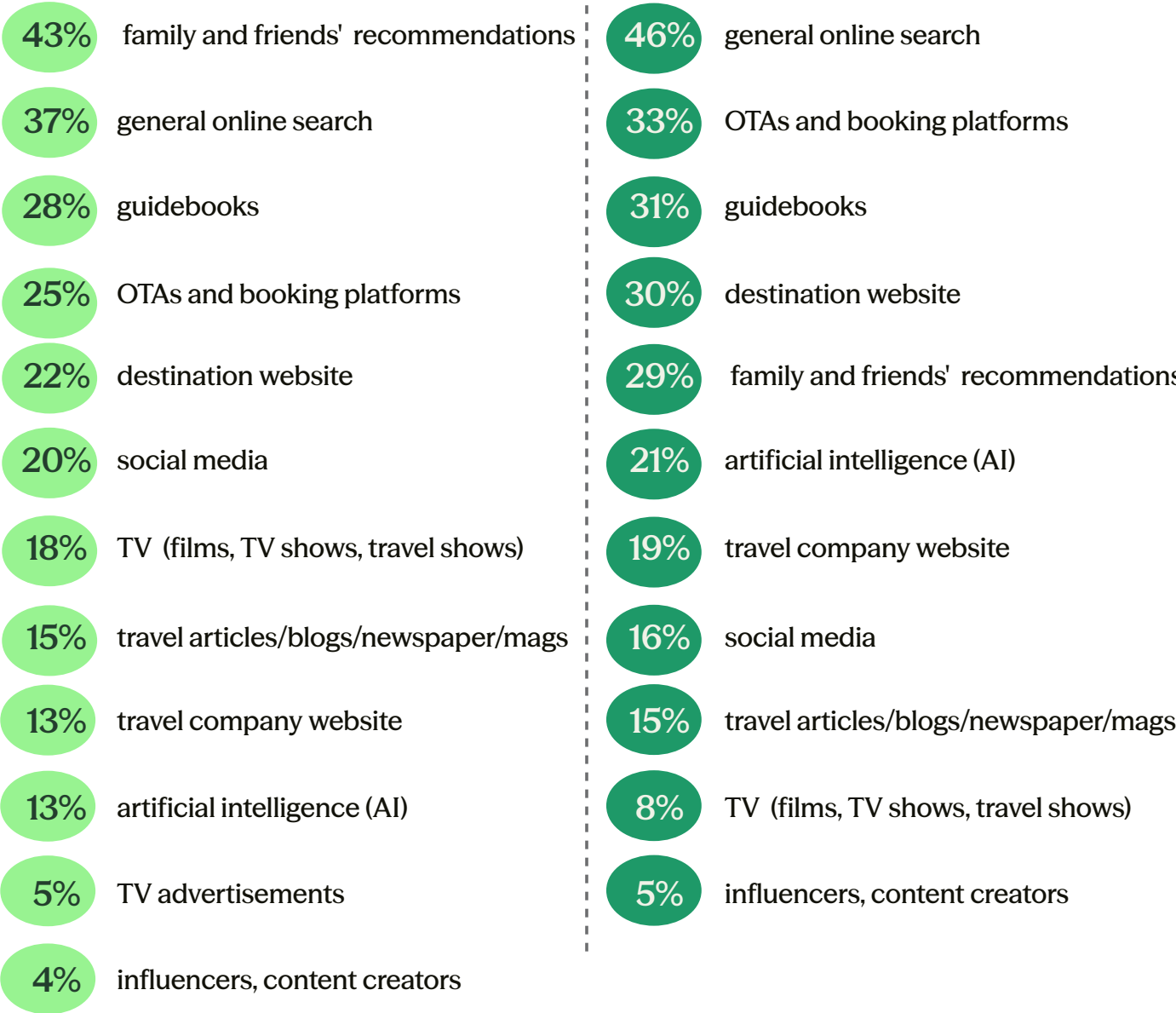
Many holidaymakers (46%) use general online search to plan their trip

DREAMING



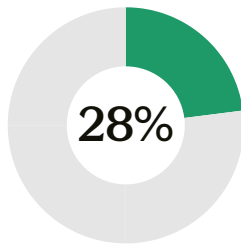
RESEARCH AND PLANNING

BASED ON RESPONDENTS' TOP 3 SOURCES



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 obtain the most authentic experience**. Regardless of the chosen 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

In 2025, Spain was the world’s thirteenth-largest outbound market, with 77% of its outbound trips going to other parts of Europe.

ACCESS BY AIR

In 2025, there were more than 4.4 million direct one-way air seats available on over 23,000 flights from Spain to the island of Ireland. There were 19 gateways from Spain to airports on the island of Ireland.



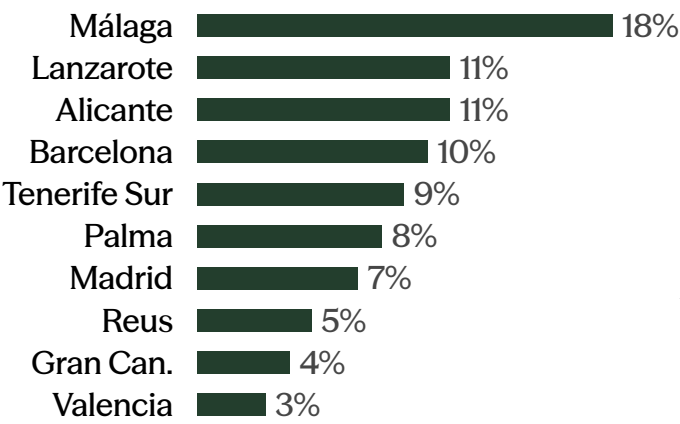
WHERE CAN OUR TOURISTS FLY FROM?

The top ten Spanish airports accounted for the majority (86%) of seats in 2025. Málaga accounted for nearly one in five (18%) seats.

WHO CAN OUR TOURISTS FLY WITH?

Seven carriers operated routes between Spain and the island of Ireland. Three key carriers provided most seats (89%): Ryanair (60%), Aer Lingus (21%) and easyJet (8%).

SHARE OF SEATS BY AIRPORT (TOP 10)



SHARE OF SEATS BY CARRIER

