

SPAIN

MARKET PROFILE 2023



INBOUND TOURISTS

The island of Ireland welcomed around 286,000 Spanish tourists who spent over €264/£230 million and stayed 3.5 million nights. Spain was the island's fifth-largest source of overseas revenue, tourists and nights.



WHERE DID OUR TOURISTS COME FROM?

The majority (64%) of Spanish tourists came from Barcelona (17%), Madrid (17%), the South (16%) and the East (14%).

Barcelona	Madrid	South	East	North-Centre	Centre	North-East	North-West	Canaries / Balearics
17%	17%	16%	14%	10%	9%	8%	5%	4%

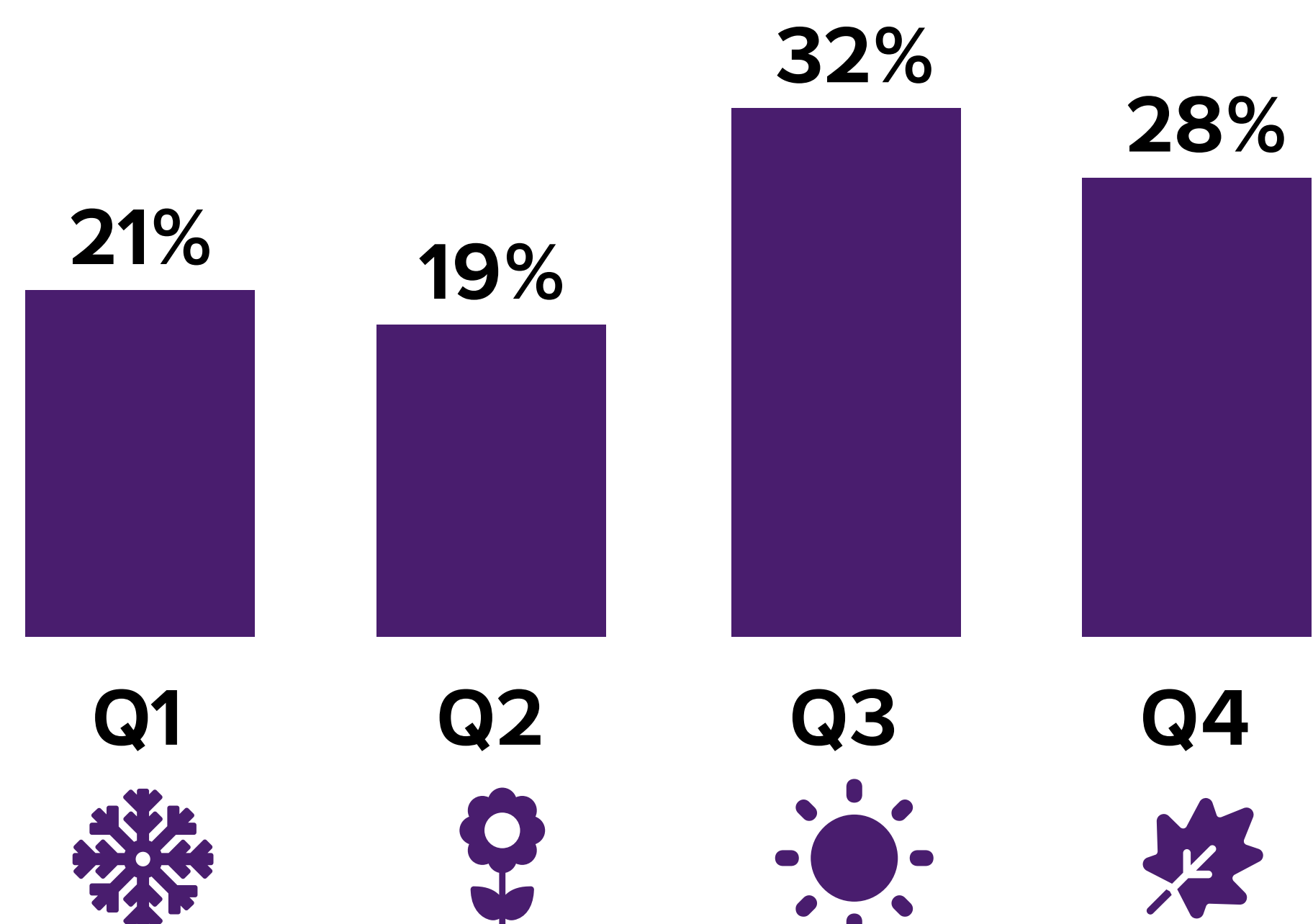
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





Three-fifths (60%) of Spanish tourists visited the island during Q3 and Q4 (July - December).



INBOUND TOURISTS

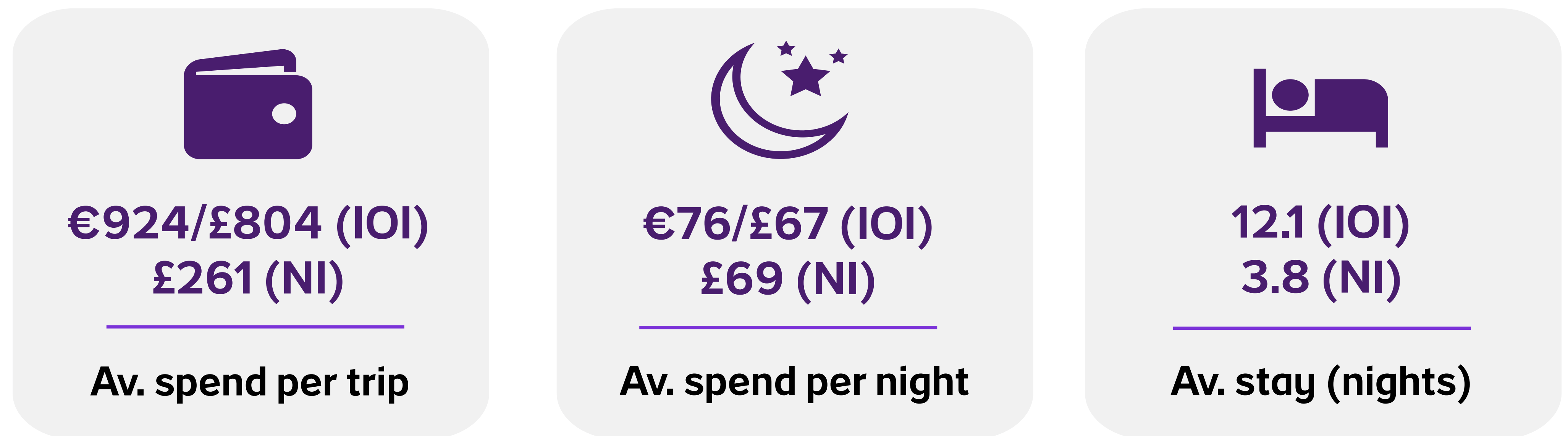
WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Over a third (36%) of Spanish tourists visiting the island of Ireland came for a holiday, accounting for 28% of Spanish tourism revenue. Around one-in-seven (15%) were visiting for "other" reasons and they accounted for the largest share (45%) of Spanish tourism revenue.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€75/£65m	28%	102k	36%	639k	19%
 VFR	€42/£37m	16%	109k	38%	779k	23%
 BUSINESS	€29/£25m	11%	33k	11%	285k	8%
 OTHER	€118/£103m	45%	42k	15%	1.7m	51%

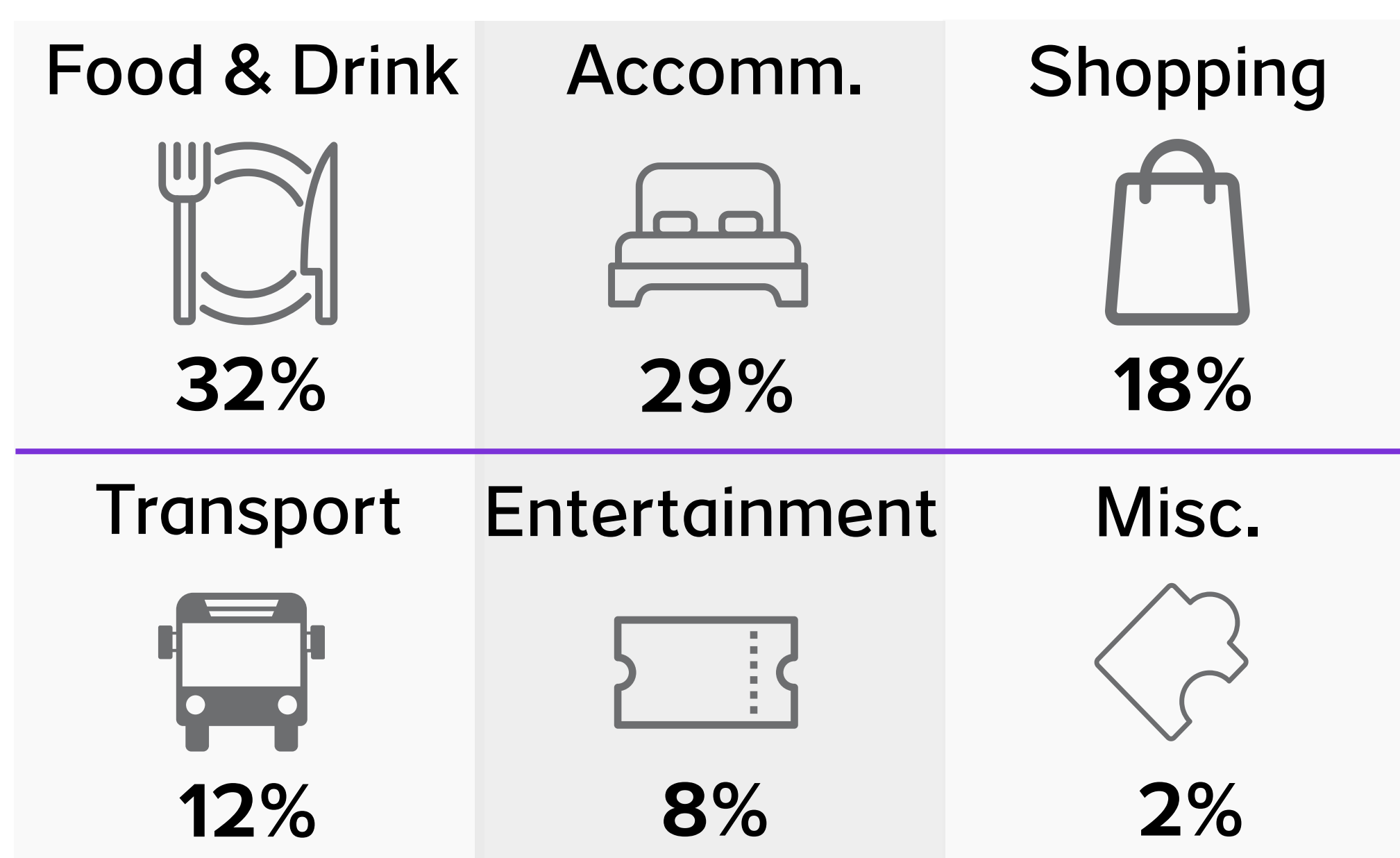
HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average, Spanish tourists spent €924/£804 per trip or €76/£67 per night and stayed 12.1 nights on the island of Ireland.



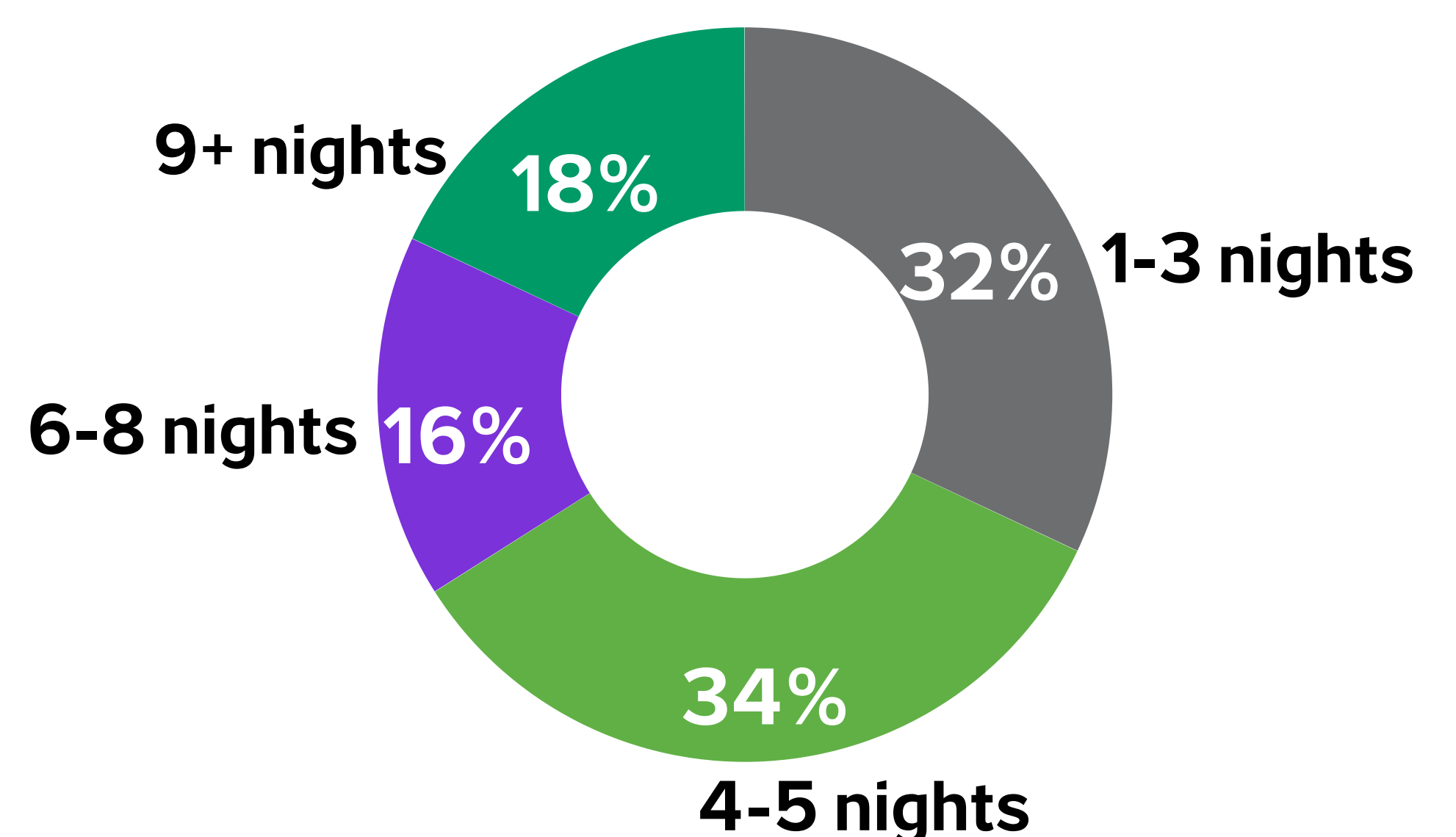
HOW DID OUR TOURISTS SPEND THEIR MONEY?

A third (32%) of Spanish tourists' revenue was spent on food and drink.



HOW LONG DID OUR TOURISTS STAY?

Over two-thirds (68%) stayed four or more nights on the island of Ireland.



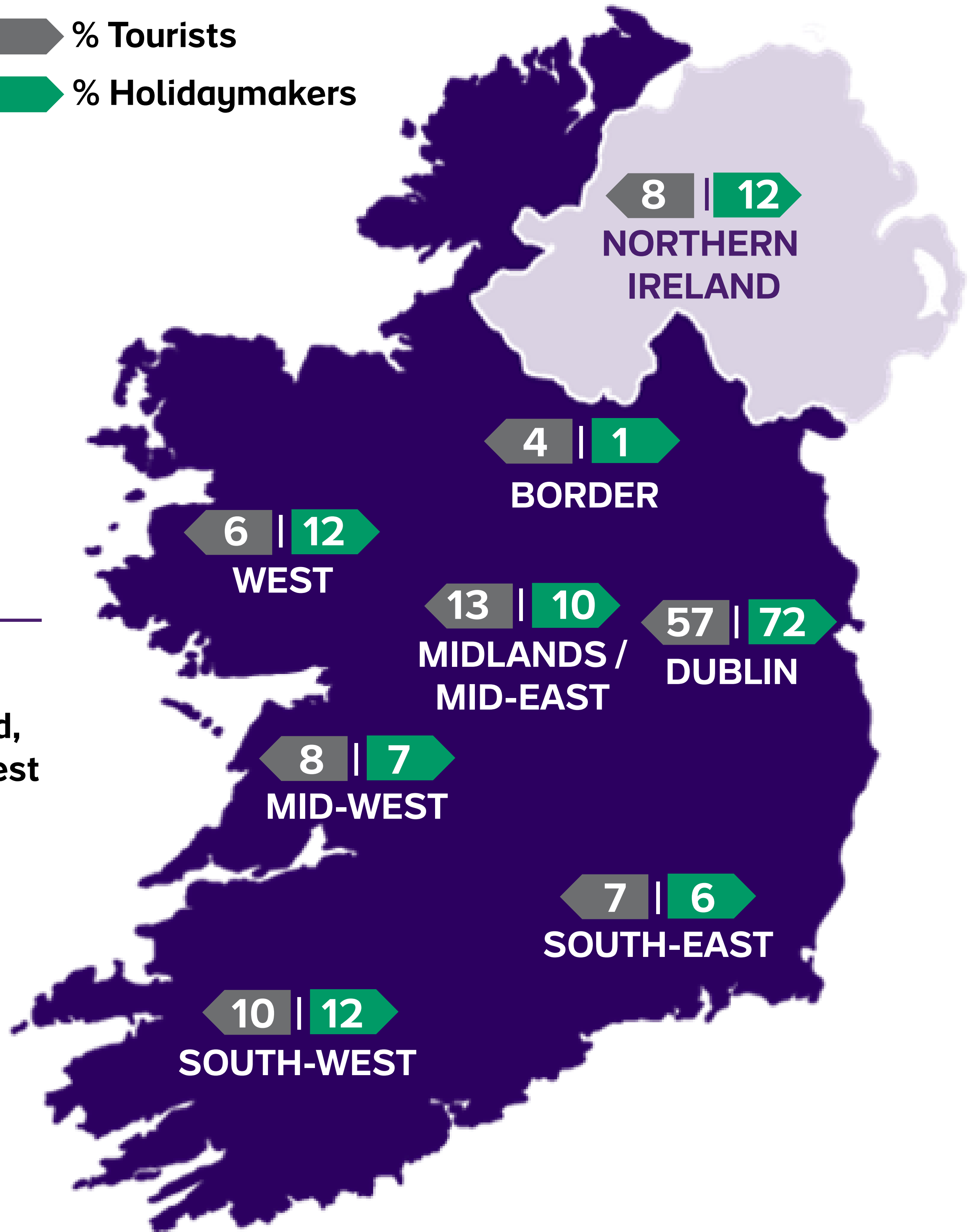
INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was the most popular region for Spanish tourists and holidaymakers.

Spanish tourists were more likely to overnight in the Midlands and Mid-East while Spanish holidaymakers were more likely to overnight in the South-West, West, and Northern Ireland.

▶ % Tourists
▶ % Holidaymakers

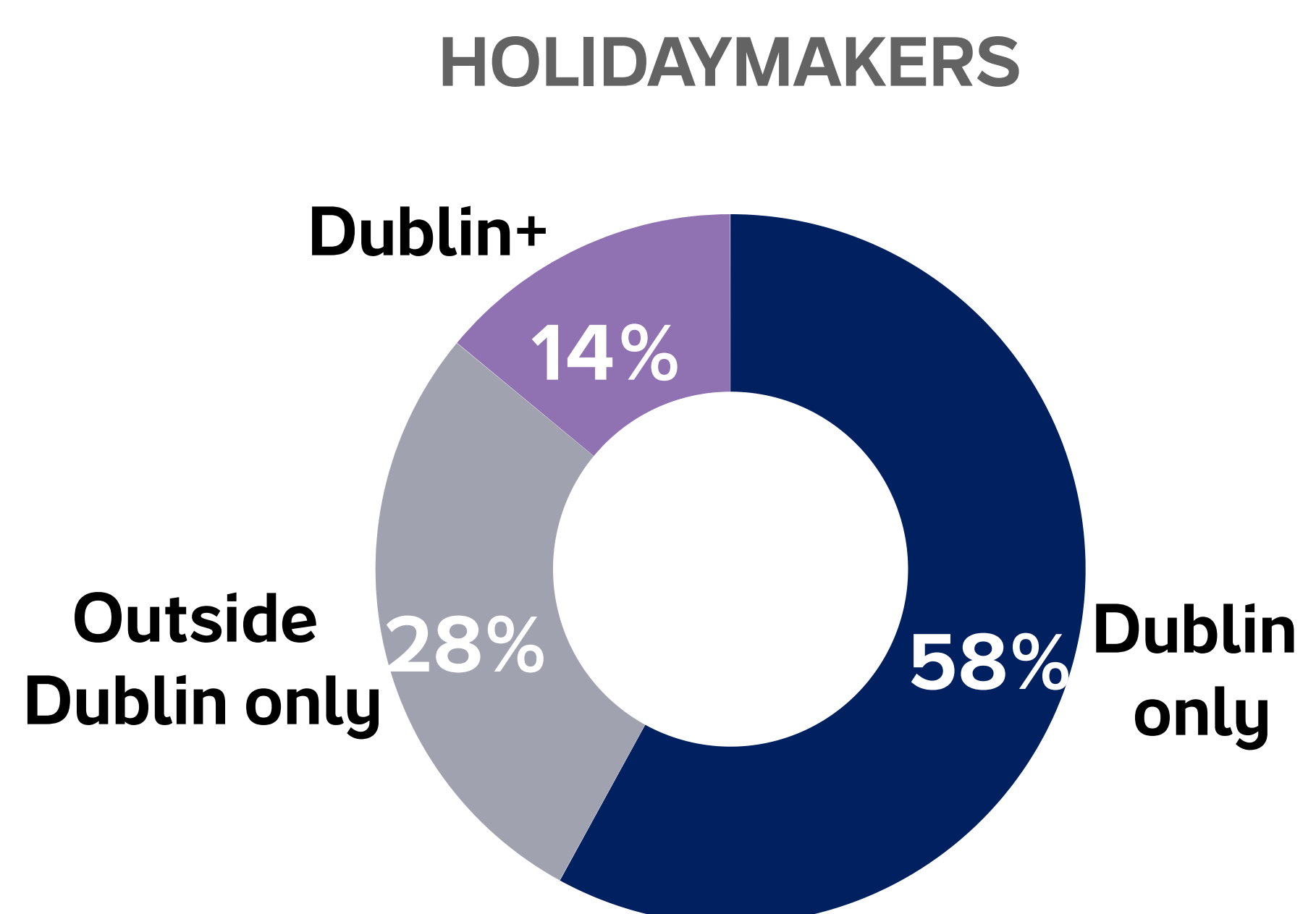
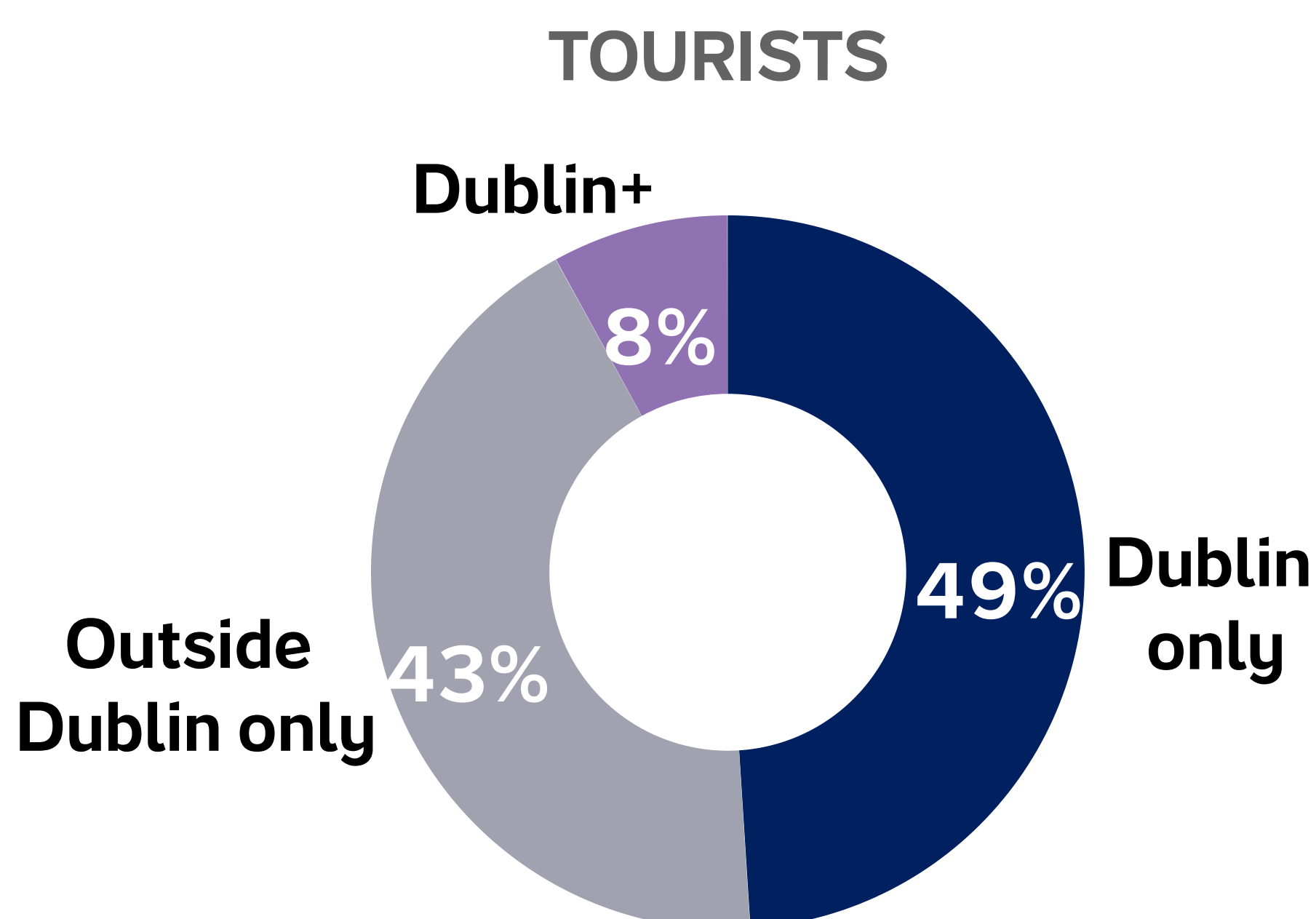


Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	Midlands / Mid-East	Northern Ireland, West, South-West
#3	South-West	Midlands / Mid-East

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

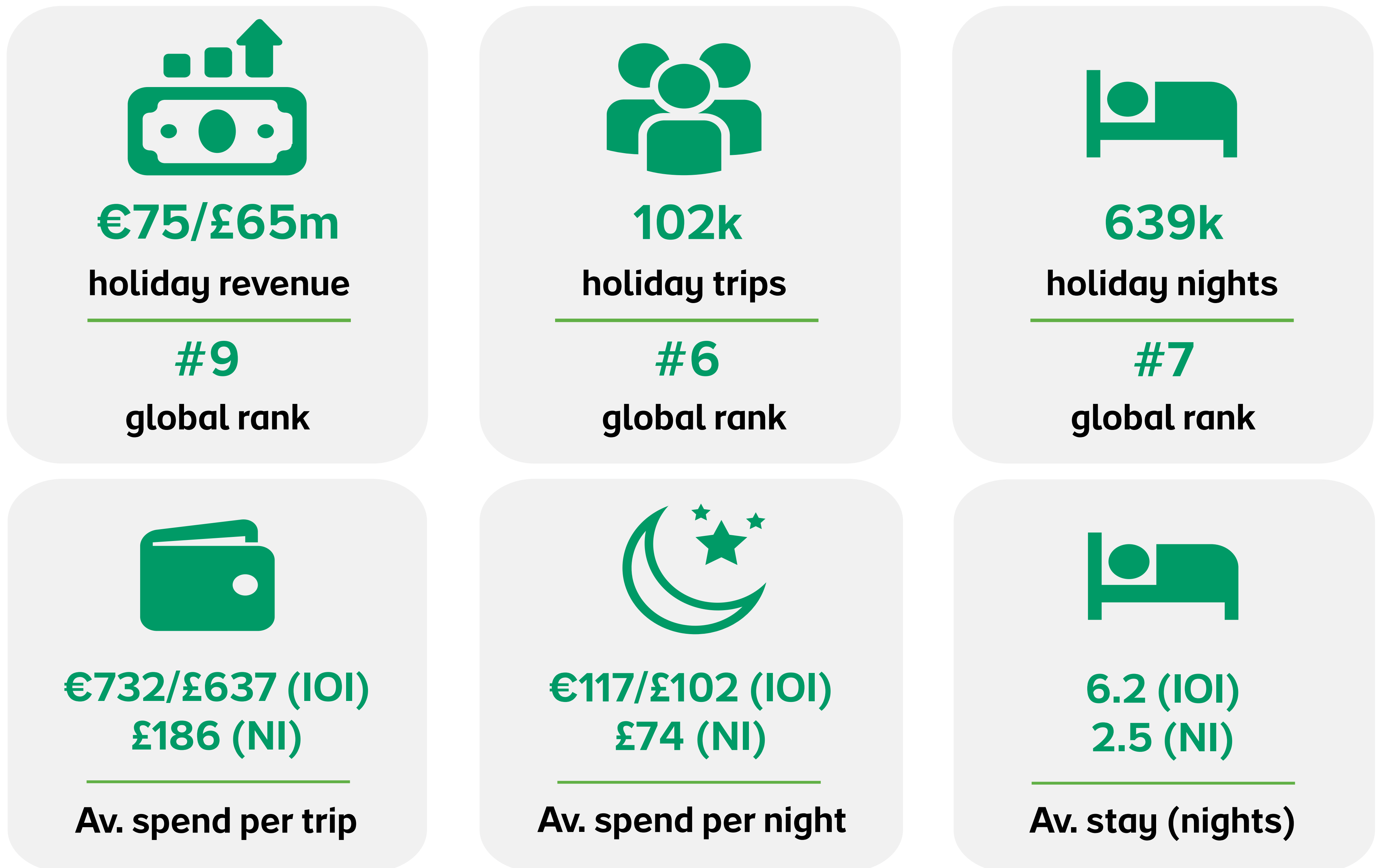
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Spanish tourists (57%) and holidaymakers (72%).



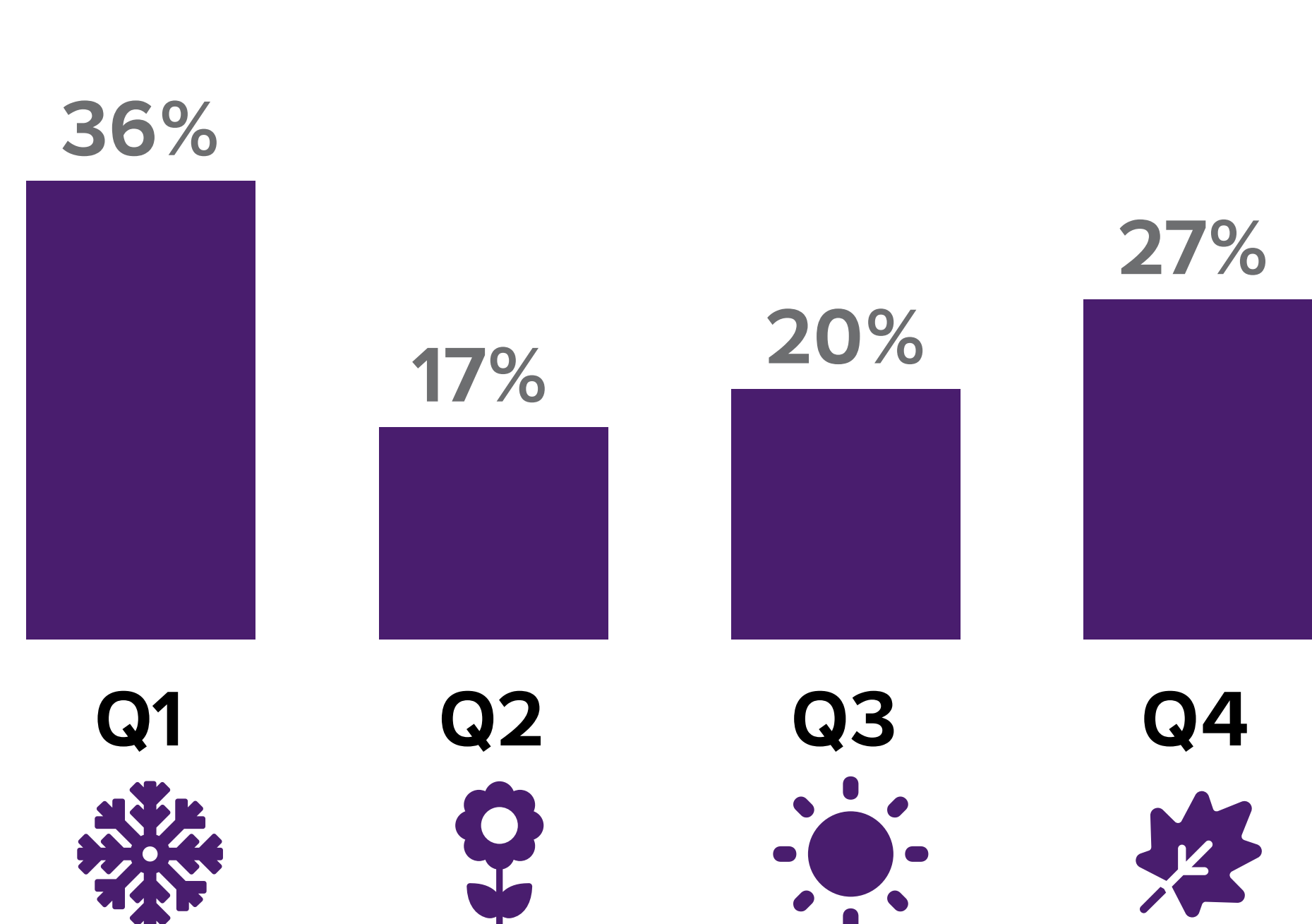
INBOUND HOLIDAYMAKERS

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 €732/£637 per trip (or €117/£102 per night) and stayed on average 6.2 nights.



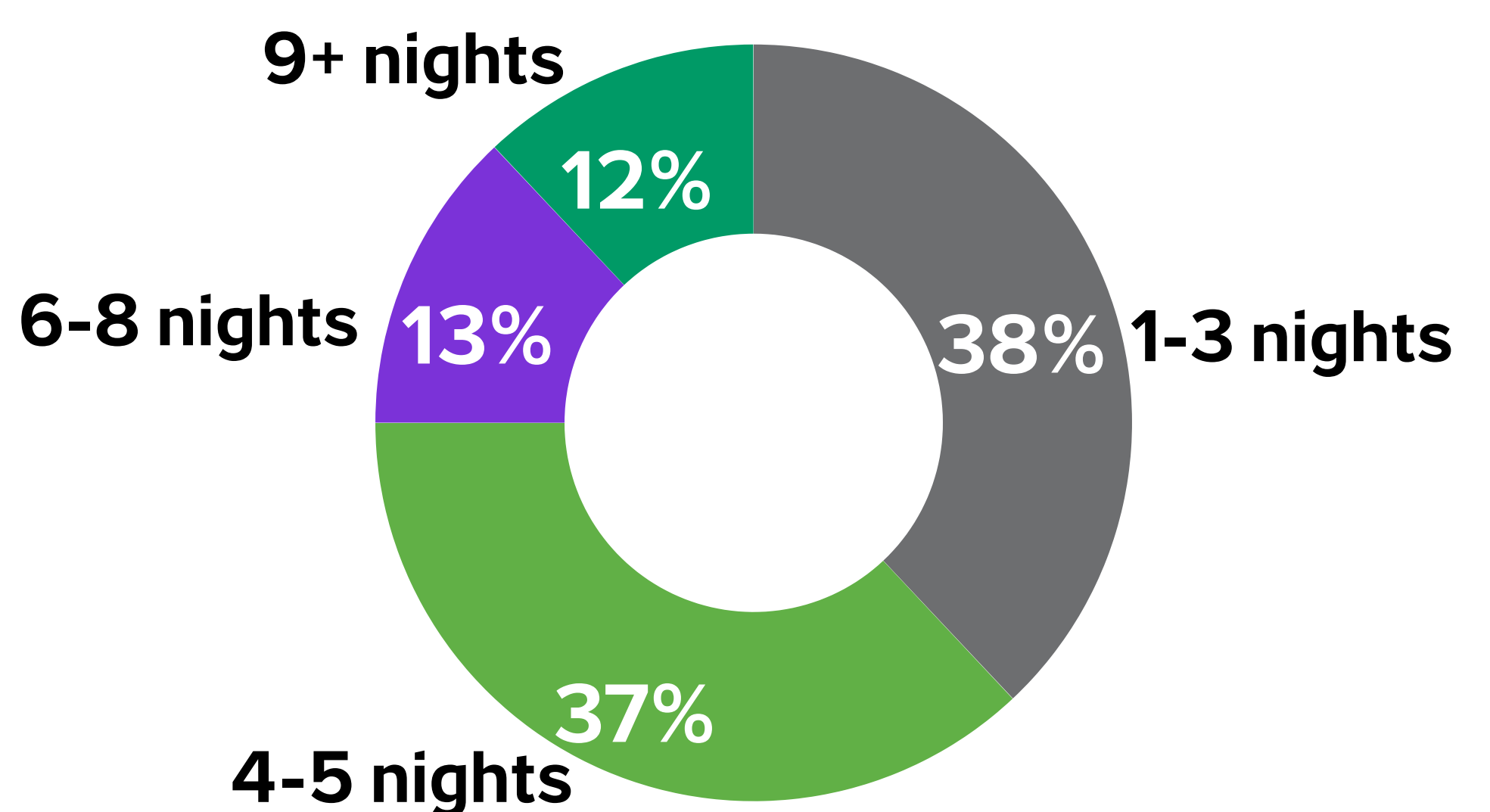
WHEN DID OUR HOLIDAYMAKERS VISIT?

Around three-in-five (63%) visited the island of Ireland in Q1 and Q4 (January - March and October - December).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

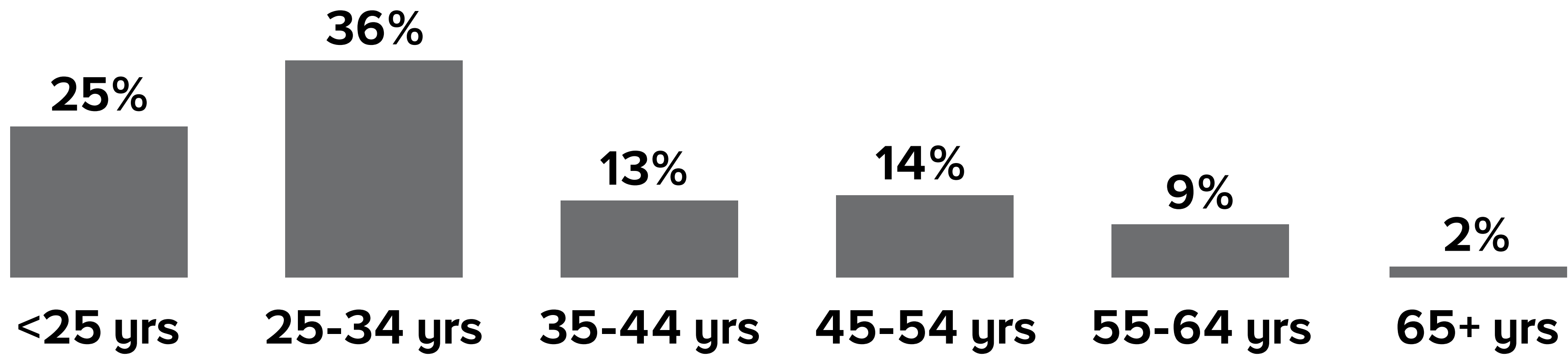
The majority (76%) of Spanish holidaymakers stayed up to five nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

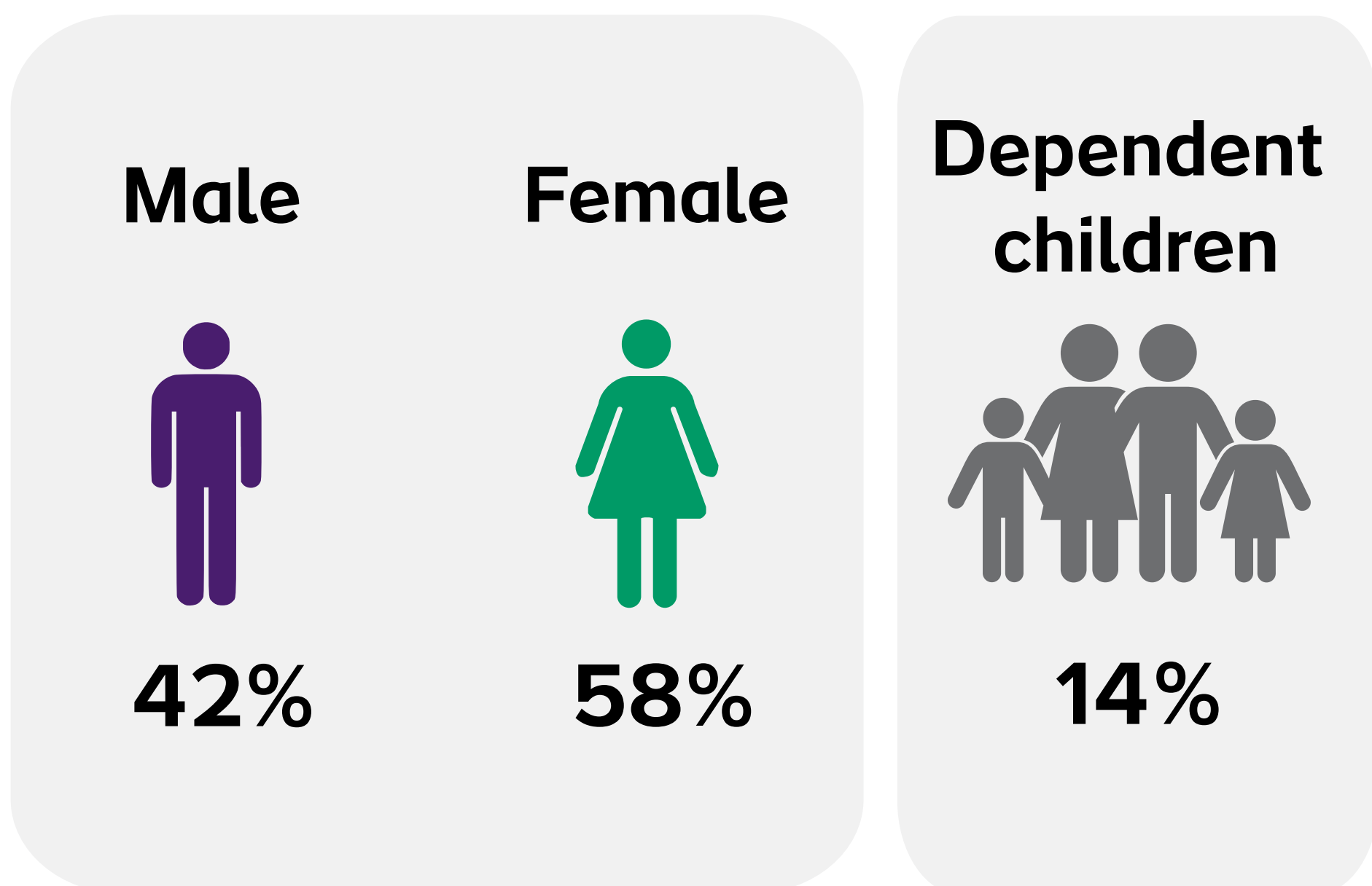
WHAT AGE WERE OUR HOLIDAYMAKERS?

Around six-in-ten (61%) Spanish holidaymakers were under 35 years old.



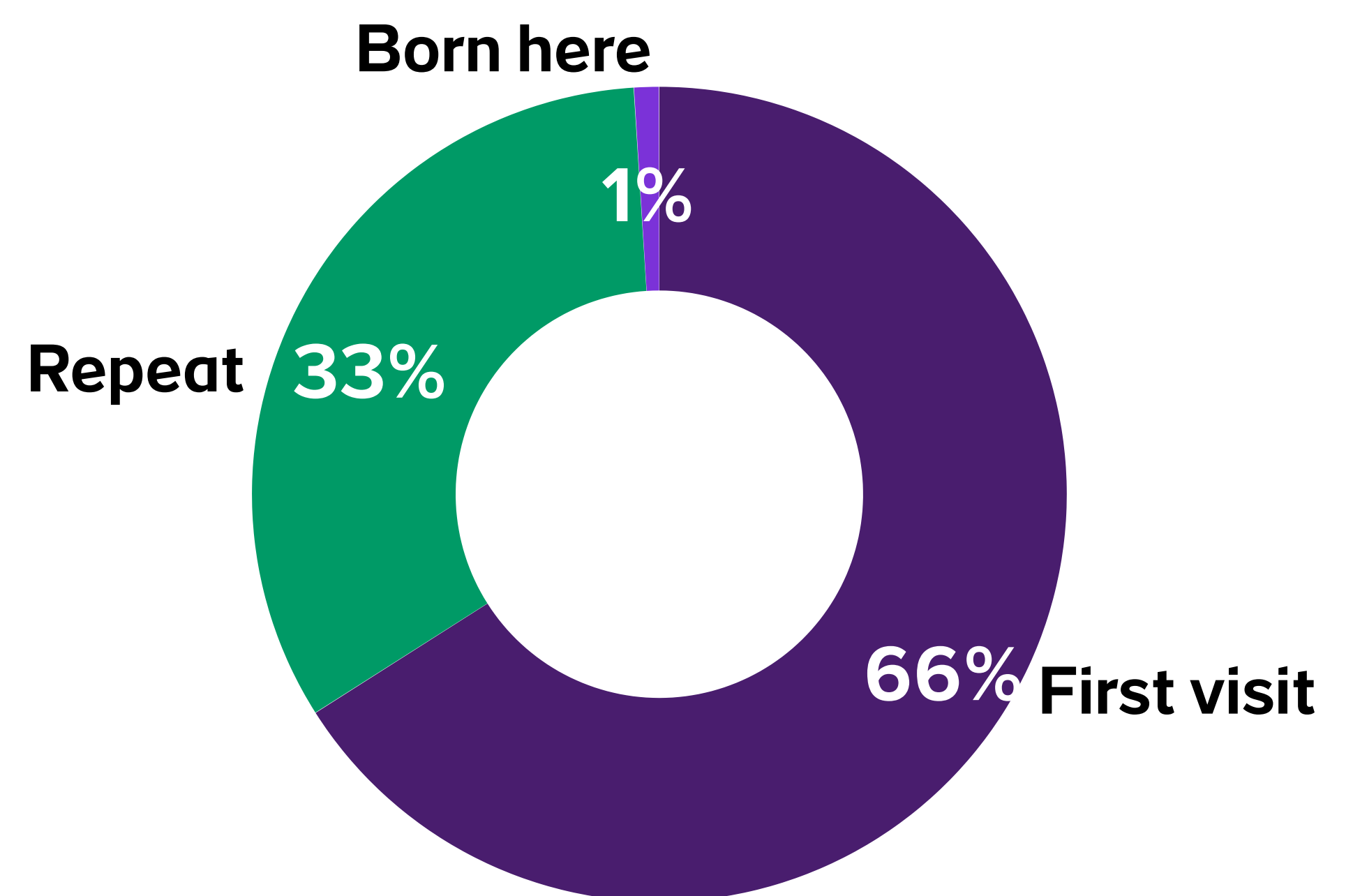
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Around three-in-five (58%) Spanish holidaymakers were female. A minority (14%) of Spanish holidaymakers had dependent children in the household (whether empty nesters or pre-children).



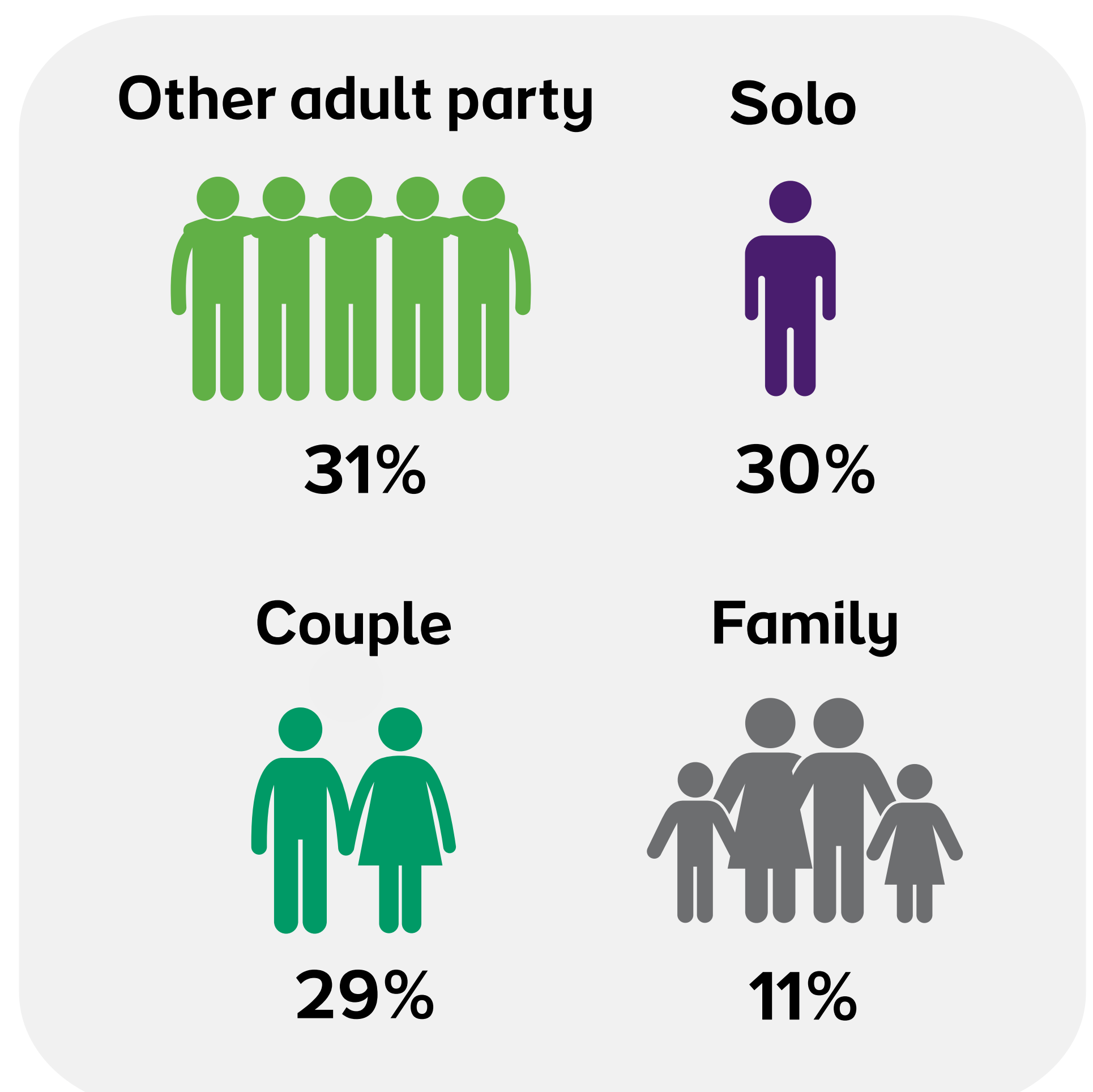
HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

It was a first visit for around two-thirds (66%) of Spanish holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

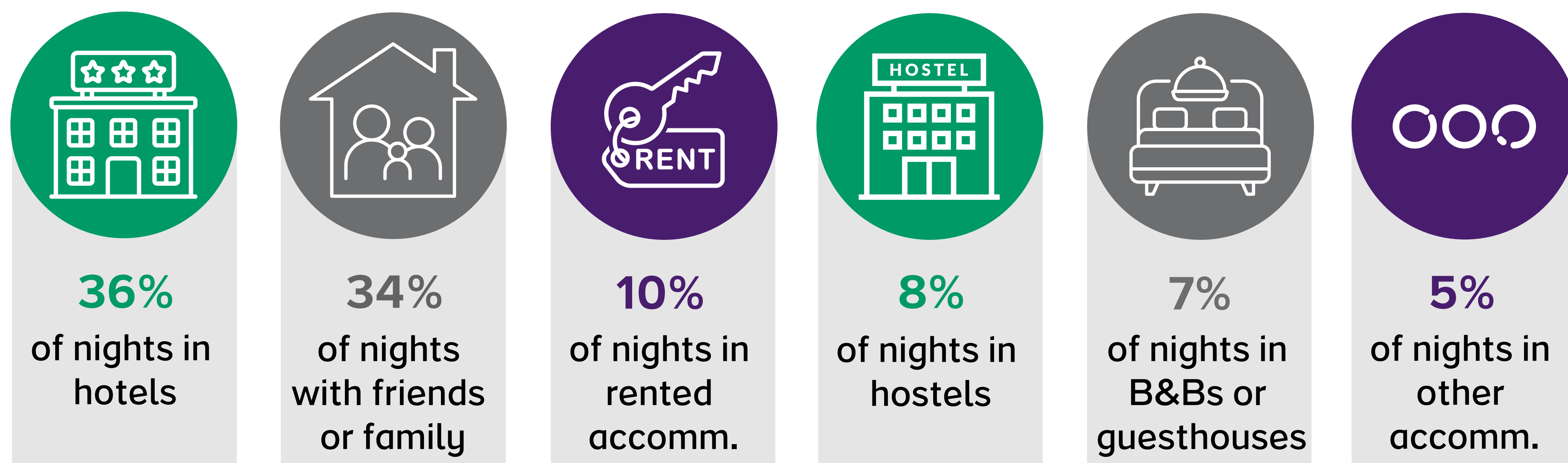
Three-in-ten (31%) travelled with an "other adult party" and similar proportions travelled alone (30%) or with their spouse or partner (29%).



INBOUND HOLIDAYMAKERS

WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (69%) of nights stayed by Spanish holidaymakers were in hotels (36%) and with friends or family (34%).



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

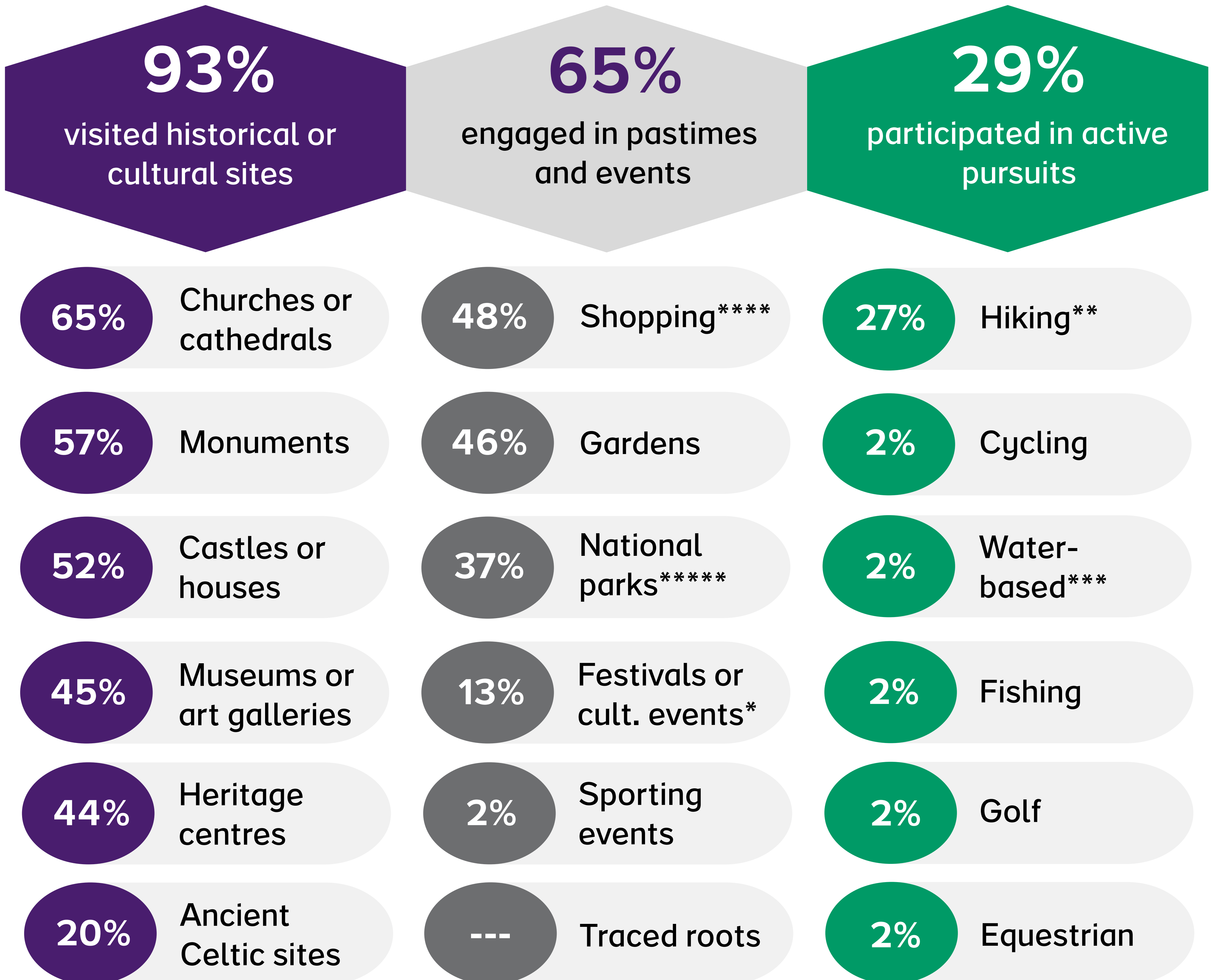
The majority (96%) of Spanish holidaymakers travelled independently and a quarter (24%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

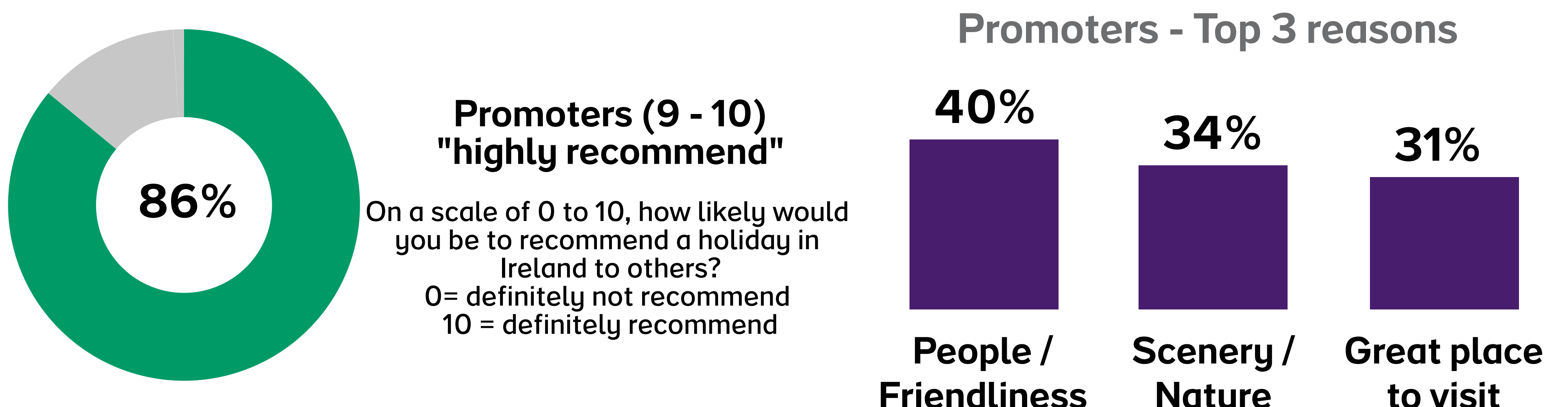
Spanish holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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 majority (86%) of Spanish holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (40%), the scenery and nature (34%) and that it's generally a great place to visit (31%).

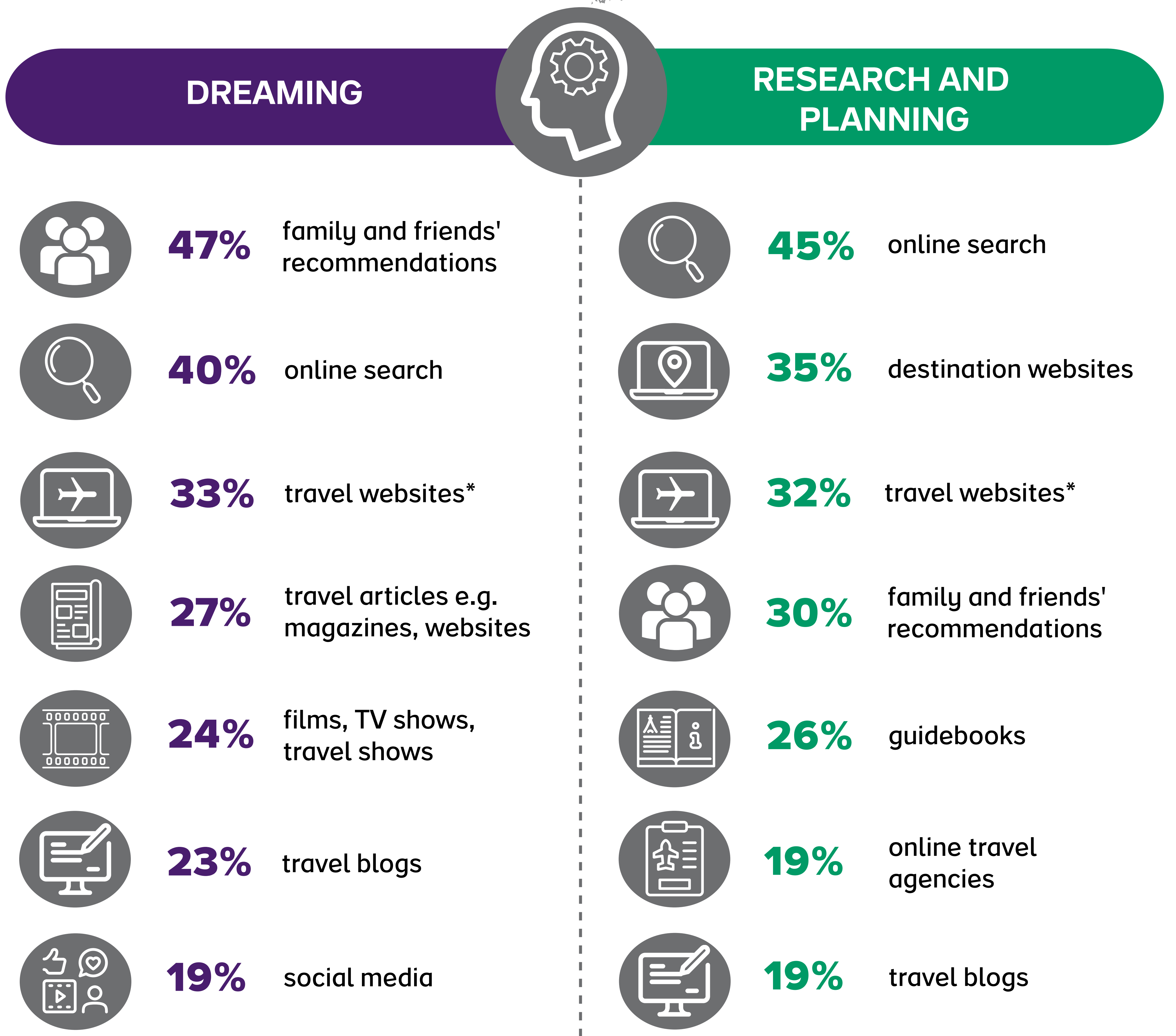


OUTBOUND HOLIDAYMAKERS

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.

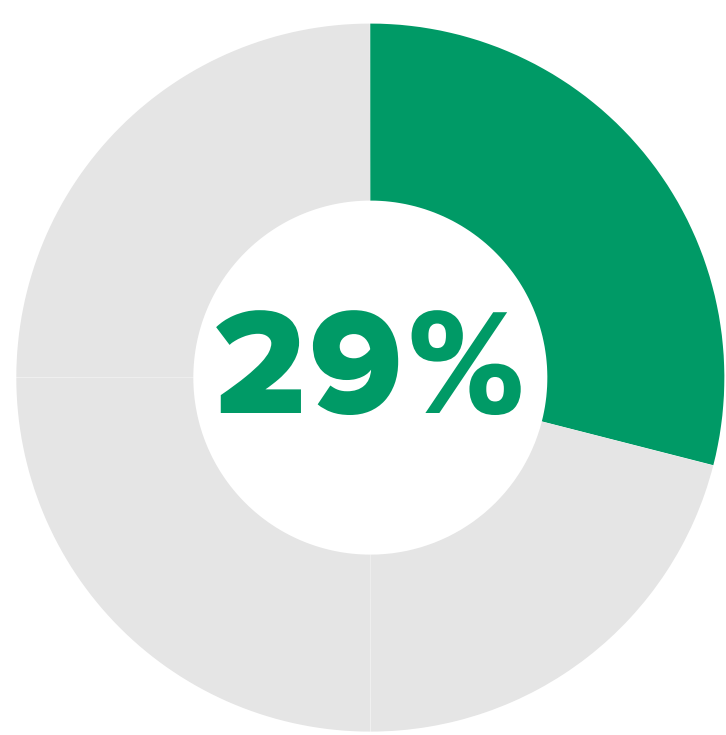
While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.



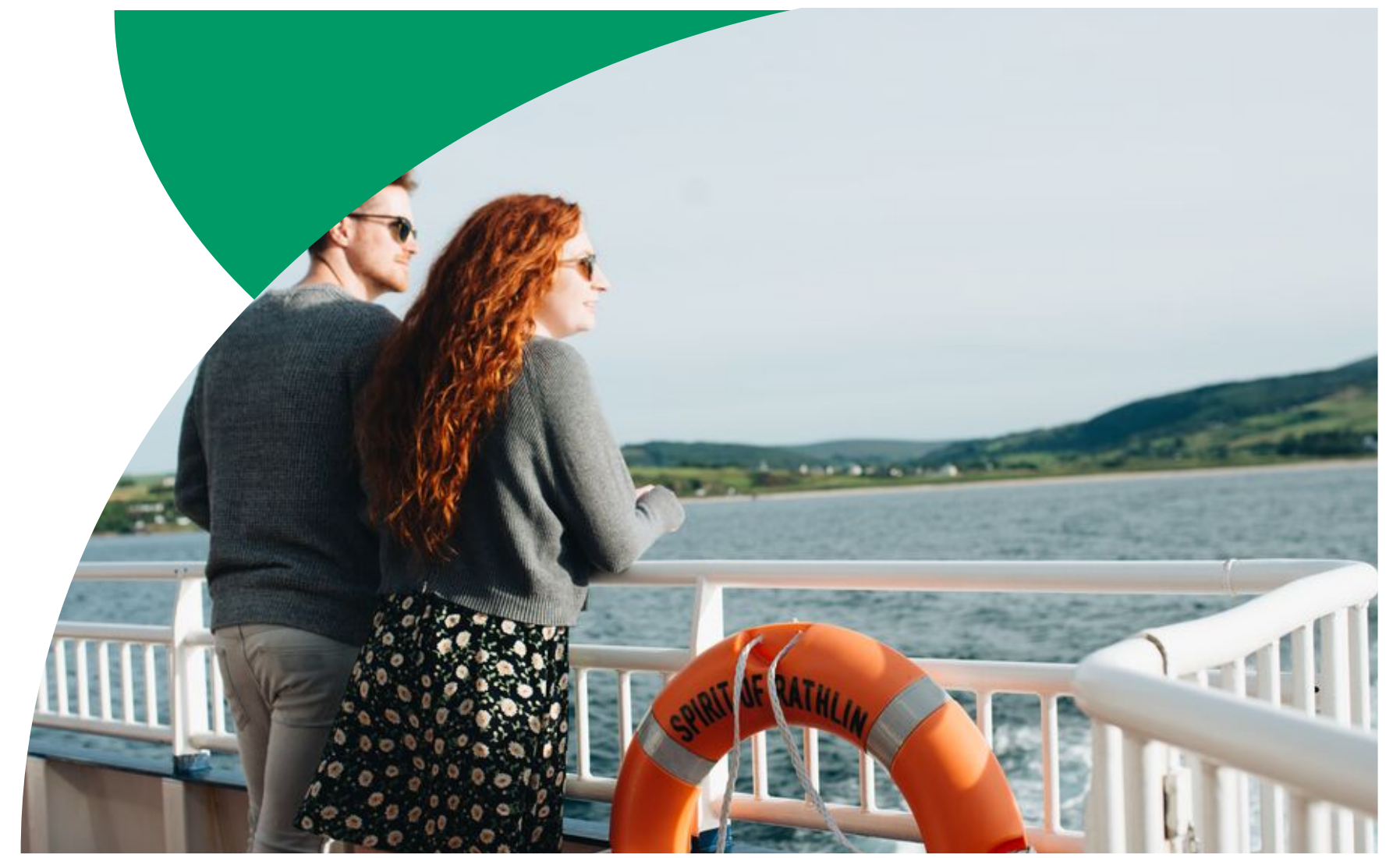
*Travel websites include company websites and booking platforms

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

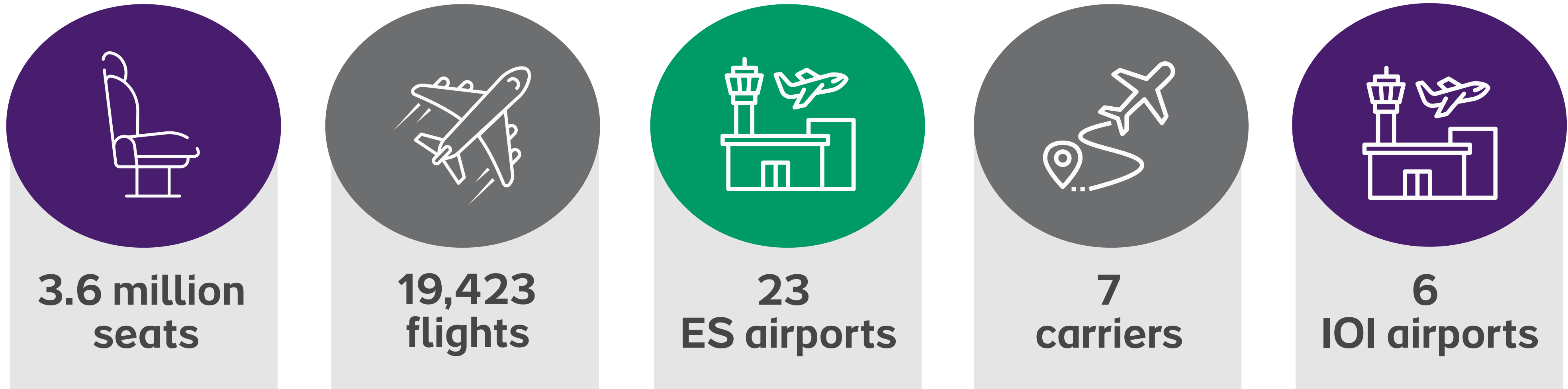
- 1  To feel connected to nature
- 2  To broaden and stimulate my mind
- 3  To feel the character of the place and people
- 4  To appreciate historical/modern architecture
- 5  To experience the vibrancy of the place and people
- 6  To experience living like a local
- 7  To enjoy authentic moments with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

OUTBOUND TOURISTS

Spain was the world's thirteenth-largest outbound market in 2023 and 80% of all outbound trips from Spain were to other parts of Europe.

ACCESS BY AIR

There were 3.6 million direct one-way air seats available on over 19,000 flights from Spain to the island of Ireland in 2023. There were 23 gateways from Spain to airports on the island of Ireland.



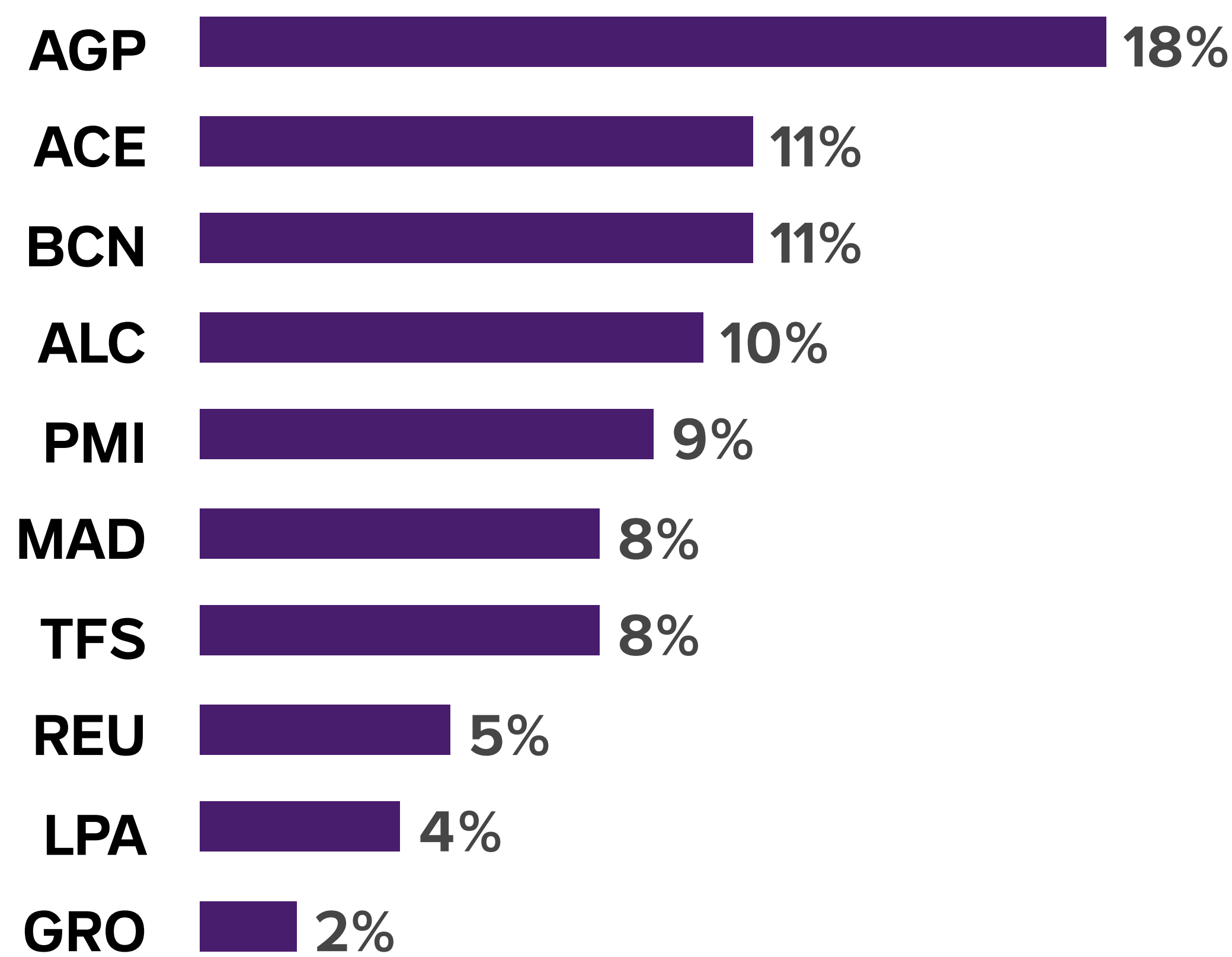
WHERE CAN OUR TOURISTS FLY FROM?

The top ten Spanish airports accounted for the majority (86%) of seats in 2023. Malága (AGP) accounted for nearly one-in-five (18%) seats.

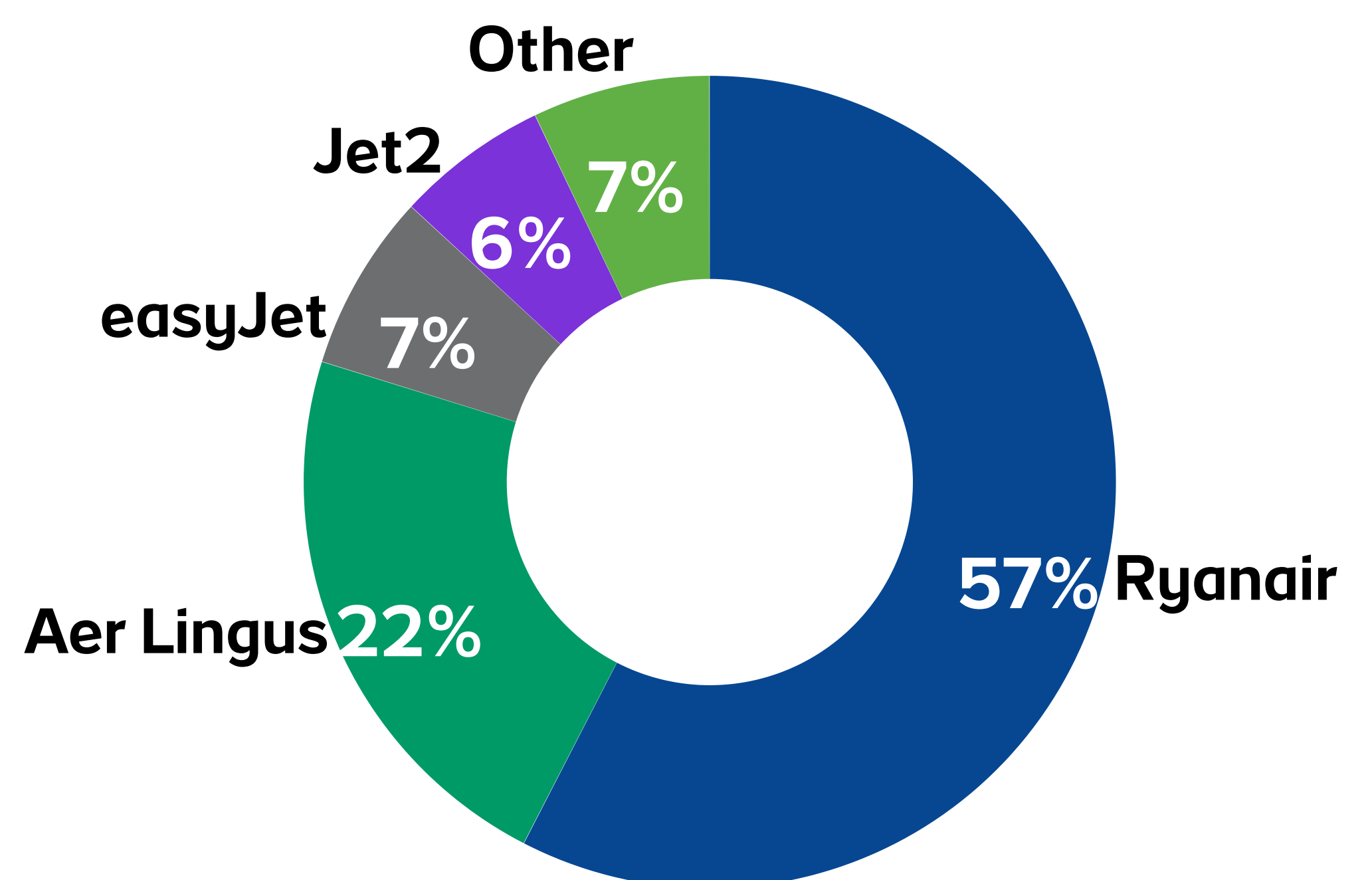
WHO CAN OUR TOURISTS FLY WITH?

Seven carriers operated between Spain and the island of Ireland. In 2023, Ryanair was responsible for delivering over half (55%) seats to the island of Ireland.

Share of seats by airport (Top 10)



Share of seats by carrier



AGP: Málaga-Costa del Sol, ACE: Lanzarote, BCN: Josep Tarradellas Barcelona-El Prat, ALC: Alicante-Elche, PMI: Palma de Mallorca Airport, MAD: Adolfo Suárez Madrid-Barajas, TFS: Tenerife South Airport, REU: Reus, LPA: Gran Canaria, GRO: Girona-Costa Brava