Spain Market Profile

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Size of the Spanish market to the island of Ireland

	2005	2006	2007	2008	2009	2010e	2011e
Outbound holiday trips (000)	9,878	10,210	11,542	11,983	10,539	12,208	12,570
Total visits (000)	178	219	267	262	262	230	251
Holiday visits (000)	65	77	102	101	98	89	91
Promotable visitors (000)	99	111	130	134	129	131	136
Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)							

All Euro (€) / Sterling (£) conversions have been carried out at a rate of €1 = £0.86798

%'s may not add to 100% due to rounding

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Holidaymakers at a glance ...

More than half (53%) of our Spanish visitors came for a short break holiday in 2011.

Hotels and Hostels provided accommodation for two thirds of Spanish holidaymakers.

Dublin was on the itinerary for the majority (90%) of Spanish holidaymakers and approximately half of these did not venture beyond Dublin.

Spanish holidaymakers tend not to use a car during their visit (71%) and almost all took an independent holiday (92%) and used the internet to book (part of) their holiday (88%).

A quarter of Spanish holidaymakers had previous experience of the island of Ireland in 2011, a trend of many years.
Spanish holidaymakers are more likely to be C1's and younger than those travelling from other markets.

Monuments and museums/art galleries hold more appeal for Spanish holidaymakers than for most markets. Gardens and National parks also hold more appeal for Spanish holidaymakers than for other European visitors. Cycling was more popular among visitors from Spanish than any other market.

A quarter of all holidaymakers from Spain came from the Madrid metropolitan area in 2011.

When do holidaymakers arrive?

Month Of Arrival	2005	2006	2007	2008	2009	2010	2011
January - March	***7%***	***12%***	***18%***	***13%***	***20%***	***11%***	***14%***
January	1%	5%	7%	5%	10%	6%	3%
February	2%	1%	7%	4%	2%	2%	2%
March	5%	6%	4%	4%	8%	3%	9%
April	7%	6%	6%	10%	2%	5%	9%
May	5%	11%	9%	8%	6%	3%	7%
June	12%	15%	6%	7%	6%	11%	11%
July	10%	12%	19%	9%	26%	15%	13%
August	25%	22%	15%	24%	10%	18%	19%
September	8%	5%	9%	10%	12%	9%	6%
October	5%	4%	11%	10%	7%	13%	10%
November	9%	4%	4%	5%	4%	9%	3%
December	11%	7%	3%	5%	7%	8%	8%
October - December	***25%***	***16%***	***17%***	***19%***	***17%***	***29%***	***21%***

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When did holidaymakers decide to visit?**

Month Decided to visit	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		1%	0%	5%	1%	3%	0%
Oct-December (previous year)		9%	12%	11%	18%	13%	16%
January		12%	12%	12%	4%	4%	9%
February		8%	7%	10%	11%	2%	10%
March		14%	9%	8%	7%	8%	11%
April		12%	7%	9%	8%	14%	10%
May		15%	17%	7%	9%	11%	11%
June		10%	8%	12%	16%	11%	11%
July		6%	11%	6%	9%	8%	6%
August		5%	5%	7%	5%	14%	7%
September		4%	9%	8%	7%	7%	8%
October		1%	1%	4%	2%	3%	2%
November		3%	2%	0%	2%	2%	0%
December		0%	0%	0%	0%	0%	0%

* some misattribution into previous year (Pre September and Oct-December)

When did holidaymakers make a reservation?**

Month reserved part of trip	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		1%	1%	2%	0%	1%	0%
Oct-December (previous year)		6%	11%	11%	17%	12%	17%
January		8%	11%	10%	0%	4%	7%
February		9%	9%	8%	11%	2%	10%
March		12%	6%	8%	6%	8%	9%
April		9%	7%	13%	7%	10%	12%
May		16%	15%	10%	10%	15%	8%
June		10%	12%	11%	17%	12%	12%
July		12%	8%	8%	11%	8%	6%
August		6%	10%	8%	7%	14%	11%
September*		5%	9%	8%	8%	8%	6%
October*		1%	1%	3%	3%	3%	2%
November*		3%	2%	1%	3%	2%	1%
December*		0%	0%	0%	0%	0%	0%

* some misattribution into previous year (Pre September and Oct-December)

How do holidaymakers travel to the island of Ireland?

Air vs. Sea	2005	2006	2007	2008	2009	2010	2011
Air	97%	99%	98%	99%	99%	97%	98%
Sea	3%	1%	2%	1%	1%	3%	2%

What is the length of stay for holidaymakers on the island of Ireland?

Length of stay	2005	2006	2007	2008	2009	2010	2011
1-5 nights	45%	45%	59%	45%	55%	62%	53%
6-8 nights	31%	26%	23%	27%	19%	20%	28%
9-14 nights	17%	21%	13%	20%	16%	13%	15%
15+ nights	6%	7%	6%	7%	9%	5%	4%
Average number of nights	*7.7*	*7.8*	*6.2*	*7.1*	*7.1*	*6.2*	*6.2*

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2005	2006	2007	2008	2009	2010	2011
Hotels	28%	24%	24%	19%	28%	31%	33%
Guesthouses & B&B's	18%	43%	32%	17%	28%	27%	19%
Rented	20%	7%	1%	16%	4%	6%	10%
Caravan/Camping	3%	2%	1%	2%	2%	1%	0%
Friends & Relatives	26%	22%	22%	14%	18%	12%	7%
Other	5%	3%	21%	32%	21%	23%	30%

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Where do holidaymakers visit on the island of Ireland?

Regions visited	2005	2006	2007	2008	2009	2010	2011
Dublin	80%	84%	90%	88%	88%	89%	90%
Midlands East	7%	5%	8%	3%	7%	6%	5%
South Eastern	13%	10%	6%	9%	11%	5%	8%
South West	32%	34%	25%	36%	27%	18%	21%
Midwest	12%	15%	15%	12%	15%	7%	10%
Western	26%	28%	20%	27%	22%	24%	29%
Northwest	6%	6%	4%	2%	6%	9%	8%
Northern Ireland	6%	9%	5%	11%	8%	14%	20%

How many holidaymakers use a car?

Car Usage	2005	2006	2007	2008	2009	2010	2011
Car Not Used	68%	69%	67%	65%	71%	77%	71%
Car Hire	30%	31%	31%	34%	28%	20%	27%
Car Brought	2%	0%	2%	1%	1%	3%	2%

How do holidaymakers make their travel arrangements?

Travel Arrangement	2005	2006	2007	2008	2009	2010	2011
Package	12%	9%	9%	10%	9%	6%	8%
Independent	88%	91%	91%	90%	91%	94%	92%

Use of internet to book part of trip**

	2005	2006	2007	2008	2009	2010	2011
Yes		84%	84%	91%	94%	84%	88%
No		16%	16%	9%	6%	16%	12%

Items booked online**

	2005	2006	2007	2008	2009	2010	2011
Air-Sea tickets		83%	76%	89%	90%	81%	81%
Accommodation		38%	48%	59%	71%	62%	72%
Car hire		15%	21%	23%	26%	14%	18%
Other		0%	0%	3%	3%	1%	1%

Sites visited if using the internet**

	2005	2006	2007	2008	2009	2010	2011
Travel Agent's website		2%	6%	3%	2%	4%	5%
Specific accommodation provider's website		12%	14%	23%	30%	18%	18%
Specific Air/Sea Carrier's website		58%	44%	58%	65%	69%	64%
General holiday search portal		21%	27%	26%	21%	18%	28%
Tourist Board's website		22%	10%	10%	13%	12%	13%
Other site with general info on Irish holidays		7%	8%	11%	6%	10%	6%
User Generated Sites e.g. Blogs / Trip Advisor		n/a	1%	2%	5%	2%	7%
Car Hire Website		n/a	14%	13%	16%	8%	13%
Social Networking Sites e.g. Facebook		n/a	n/a	n/a	n/a	n/a	1%
Other		4%	3%	2%	0%	0%	1%

Have holidaymakers been to the island of Ireland before?

Familiarity	2005	2006	2007	2008	2009	2010	2011
First visit	68%	69%	79%	76%	70%	73%	75%
Repeat visit	26%	31%	20%	24%	28%	25%	25%
Born on the island of Ireland	7%	0%	1%	0%	2%	1%	0%

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What is the social class profile of holidaymakers?

Social Class	2005	2006	2007	2008	2009	2010	2011
AB	21%	24%	19%	14%	25%	20%	19%
C1	67%	64%	71%	77%	65%	68%	68%
C2	10%	7%	8%	7%	10%	8%	11%
DEF	2%	4%	2%	1%	0%	3%	3%

What age are holidaymakers?

Age	2005	2006	2007	2008	2009	2010	2011
Under 16	6%	5%	6%	13%	8%	2%	6%
16-24	18%	22%	12%	13%	15%	13%	19%
25-34	44%	35%	46%	43%	44%	46%	33%
35-44	20%	19%	14%	19%	18%	17%	20%
45-54	9%	13%	15%	8%	9%	14%	14%
55+	4%	5%	8%	4%	6%	8%	8%

Who do holidaymakers travel with?

Party Composition	2005	2006	2007	2008	2009	2010	2011
Alone	40%	28%	24%	30%	29%	28%	21%
Couple	36%	36%	44%	33%	39%	47%	34%
With family	8%	16%	15%	20%	17%	9%	21%
Other Adult Party	16%	20%	17%	18%	16%	16%	25%

Segments

Best Description of Holiday Needs	2005	2006	2007	2008	2009	2010	2011
S&CS's	74%	84%	80%	83%	68%	74%	81%
Outdoor Actives	1%	0%	1%	2%	4%	3%	2%
Family & Loved Ones	10%	7%	5%	1%	4%	4%	4%
Affinity Groups	2%	0%	0%	2%	6%	3%	2%
Luxury Lovers	0%	0%	0%	0%	0%	0%	0%
Relaxers	10%	8%	11%	10%	9%	13%	7%
Social Adventurers	3%	1%	3%	3%	10%	3%	4%

What sites of historical interest do our holidaymakers visit?**

	2005	2006	2007	2008	2009	2010	2011
Any Of The Below		84%	80%	85%	88%	86%	89%
Historic Houses/Castles		70%	64%	76%	75%	80%	81%
Monuments		67%	63%	72%	73%	72%	79%
Heritage/Interpretative Centres		39%	43%	54%	36%	56%	64%
Museums/Art Galleries		49%	53%	58%	47%	62%	66%
Other Sites Of Cultural Historical Interest		7%	12%	5%	7%	4%	22%
None Of These		16%	20%	15%	12%	14%	11%

What pastimes/events do our visitors engage in?**

	2005	2006	2007	2008	2009	2010	2011
Visited Gardens		29%	13%	40%	53%	52%	66%
Visited National Parks/Forests		n/a	n/a	n/a	44%	44%	63%
Attended An Organised Sporting Event		1%	1%	2%	2%	3%	1%
Tracing Roots/Geneology		0%	0%	0%	0%	0%	0%
Attended Cultural Event/Festival		6%	5%	7%	18%	11%	7%
Used Spa Facilities		0%	1%	0%	3%	2%	1%
None Of These		n/a	n/a	55%	31%	35%	23%

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What activities do our holidaymakers engage in?**

	2005	2006	2007	2008	2009	2010	2011
Fishing		0%	1%	1%	1%	1%	0%
Equestrian Pursuits		0%	2%	0%	1%	2%	1%
Cycling		3%	10%	2%	4%	5%	9%
Golf		0%	2%	1%	0%	1%	1%
Hiking/Cross-Country Walking		6%	13%	6%	24%	10%	15%
Other Water Based Activities		1%	3%	1%	2%	0%	0%

How much travelling do our holidaymakers do in Ireland?**

Regionality Segments	2005	2006	2007	2008	2009	2010	2011
Dublin Only		46%	55%	51%	57%	64%	54%
Tourer		24%	18%	31%	22%	19%	23%
Static Regional		13%	5%	8%	12%	8%	5%
Two Bases		16%	22%	10%	9%	9%	17%

Where do our holidaymakers come from?**

	2005	2006	2007	2008	2009	2010	2011
Barcelona Metropolitan		31%	31%	15%	16%	22%	16%
North East		8%	3%	6%	10%	7%	6%
East		14%	7%	7%	7%	11%	5%
South		15%	10%	10%	8%	10%	13%
Madrid Metropolitan		27%	33%	50%	35%	26%	26%
Centre		0%	7%	3%	5%	7%	11%
North West		3%	4%	5%	6%	7%	4%
North Centre		3%	8%	4%	12%	11%	19%

sources: Failte Ireland's Survey of Travellers (SOT) and NITB / NISRA's Northern Ireland Passenger Survey (NIPS)
** Tables annoted with two stars are extracted from the SOT only ,so while they include holidaymakers who travel to Northern Ireland via the Republic of Ireland, holidaymakers using air or sea ports in Northern Ireland are not included in the statistics.

Ireland's Image

What are the top things people from Spain hope to see, do or experience in Ireland?

source: Tourism Ireland's Global Brand Tracker 2012 - 1000 Spanish people surveyed at home

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