

Nordics Market Profile 2024

Contents

Inbound Tourists	2
Where did our tourists come from?	2
Where did our tourists visit?	2
When did our tourists visit?	2
What were our tourists' reasons for visiting?	3
How much did our tourists spend and how long did they stay?	3
How did our tourists spend their money?	4
How long did our tourists stay?	4
Regionality: Inbound Tourists and Holidaymakers	5
Definitions	5
What areas did our tourists and holidaymakers visit?	5
Where did our tourists and holidaymakers visit?	6
Inbound Holidaymakers	7
When did our holidaymakers visit?	7
How long did our holidaymakers stay?	7
What age were our holidaymakers?	7
Holidaymaker gender and dependent children	8
Had our holidaymakers been here before?	8
Who did our holidaymakers travel with?	8
Where did our holidaymakers stay?	8
How did our holidaymakers travel and get around	8
What were our holidaymakers' interest and activities?	9
Likelihood to recommend a holiday in Ireland to others	9
Outbound holidaymakers	10
Sources of inspiration, research and planning	10
Enrichment Explorers	11
Who are the Enrichment Explorers as people?	11
What do they look for on a holiday?	11
Top 10 holiday needs	11
Outbound Tourists	11
Access by air	12
Where can our tourists fly from?	12
Who can our tourists fly with?	12

Inbound Tourists

The island of Ireland welcomed around 175,000 Nordic tourists who spent over €162 million / £141 million and stayed 1.1 million nights. The Nordics was the island's ninth-largest source of overseas tourists and the tenth-largest source of overseas revenue and nights

Metric	Value	Global Rank
Revenue	€162 million / £141 million	10th
Trips	175 thousand	9th
Nights	1.1 million	10th

Where did our tourists come from?

Almost two-thirds (63%) of Nordic tourists came from Sweden (32%) and Denmark (30%).

Region	Share of trips
Sweden	32%
Denmark	30%
Norway	20%
Finland	13%
Iceland	4%

Where did our tourists visit?

Country	Trips
Ireland	169,000
Northern Ireland	14,000

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

When did our tourists visit?

Quarter 2 (April - June) was the most popular quarter for Nordic tourists to visit the island of Ireland in 2024.

Quarter	Share of visits
Quarter 1	19%
Quarter 2	32%
Quarter 3	27%
Quarter 4	22%

What were our tourists' reasons for visiting?

Half of all revenue generated from Nordic tourists came from holidaymakers, and they represented 45% of all tourists. Visiting friends and relatives was the second most popular (26%) reason for Nordic tourists visiting, though they only generated 14% of revenue.

Purpose of visit	Revenue	Share of revenue
Holiday	€81 million / £70 million	50%
Visiting friends / relatives	€22 million / £19 million	14%
Business	€37 million / £32 million	23%
Other	€22 million / £19 million	14%

Purpose of visit	Trips	Share of trips
Holiday	78,000	45%
Visiting friends / relatives	45,000	26%
Business	39,000	22%
Other	15,000	9%

Purpose of visit	Nights	Share of nights
Holiday	404,000	37%
Visiting friends / relatives	304,000	28%
Business	188,000	17%
Other	195,000	18%

How much did our tourists spend and how long did they stay?

On average, Nordic tourists spent €925 / £805 per trip or €148 / £129 per night and stayed 5.5 nights on the island of Ireland.

Region	Metric	Value
Island of Ireland	Average spend per trip	€925 / £805
Island of Ireland	Average spend per night	€148 / £129
Island of Ireland	Average length of stay	6.2 nights
Northern Ireland	Average spend per trip	£364
Northern Ireland	Average spend per night	£86
Northern Ireland	Average length of stay	4.2 nights

How did our tourists spend their money?

A third (35%) of Nordic tourists' revenue was spent on food and drink.

Category	Share of spend
Food & Drink	35%
Accommodation	29%
Shopping	19%
Transport	9%
Entertainment	7%
Miscellaneous	1%

How long did our tourists stay?

Seven-in-ten (70%) stayed up to five nights on the island of Ireland.

Length of stay	Share of trips
1-3 nights	34%
4-5 nights	36%
6-8 nights	19%
9+ nights	11%

Regionality: Inbound Tourists and Holidaymakers

Definitions

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

What areas did our tourists and holidaymakers visit?

Dublin, the South-West and the West were the most popular regions for Nordic tourists and holidaymakers - though holidaymakers preferred the West over the South-West.

Region	Share of tourists
Dublin	65%
Midlands / Mid-East	11%
South-East	5%
South-West	15%
Mid-West	4%
West	13%
Border	4%
Northern Ireland	8%

Region	Share of holidaymakers
Dublin	71%
Midlands / Mid-East	7%
South-East	4%
South-West	22%
Mid-West	5%
West	27%
Border	6%
Northern Ireland	10%

Where did our tourists and holidaymakers visit?

Dublin was a must-visit for the majority of Nordic tourists (65%) and holidaymakers (71%).

Region	Share of tourists
Dublin only	54%
Outside Dublin only	35%
Both Dublin and outside Dublin	11%

Region	Share of holidaymakers
Dublin only	49%
Outside Dublin only	29%
Both Dublin and outside Dublin	22%

Inbound Holidaymakers

The Nordics were the island of Ireland's ninth-largest source of holidaymakers and tenth-largest source of holiday revenue and holiday nights. Nordic holidaymakers stayed for an average of 5.2 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 2.6 nights.

Metric	Value	Global Rank
Revenue	€81 million / £70 million	10th
Trips	78 thousand	9th
Nights	404 thousand	10th

Region	Metric	Value
Island of Ireland	Average spend per trip	€1,036 / £901
Island of Ireland	Average spend per night	€200 / £174
Island of Ireland	Average length of stay	5.2 nights
Northern Ireland	Average spend per trip	£360
Northern Ireland	Average spend per night	£140
Northern Ireland	Average length of stay	2.6 nights

When did our holidaymakers visit?

Quarter 2 (April - June) was the most popular quarter for Nordic holidaymakers to visit the island of Ireland in 2024.

Quarter	Share of visits
Quarter 1	20%
Quarter 2	33%
Quarter 3	29%
Quarter 4	18%

How long did our holidaymakers stay?

Half (48%) of Nordic holidaymakers stayed four to five nights on the island of Ireland and the majority (80%) stay less than 6 nights.

Length of stay	Share of trips
1-3 nights	33%
4-5 nights	48%
6-8 nights	15%
9+ nights	4%

What age were our holidaymakers?

Three-fifths (59%) of Nordic holidaymakers were 25 - 54 years old.

Age	Share of trips
<25 years	16%
25-34 years	21%
35-44 years	17%
45-54 years	21%
55-64 years	19%
65+ years	6%

Holidaymaker gender and dependent children

One-quarter (26%) of Nordic holidaymakers had dependent children in the household.

Gender	Share of trips
Female	55%
Male	45%

Had our holidaymakers been here before?

It was a first visit for three-quarters (74%) of Nordic holidaymakers.

Visitor type	Share of trips
First visit	74%
Repeat visit	25%
Born in Ireland	1%

Who did our holidaymakers travel with?

Half (51%) of Nordic holidaymakers travelled with their spouse/partner. One-fifth (20%) visited on their own.

Party composition	Share of trips
Solo	20%
Couple	51%
Family	12%
Other adult party	17%

Where did our holidaymakers stay?

Nordic holidaymakers spent the majority (59%) of nights in hotels and around a fifth (18%) of nights were spent in B&Bs or guesthouses.

Accommodation type	Share of nights
Hotel	59%
Guesthouse / B&B	18%
Friends / family	7%
Rented accommodation	6%
Hostels	6%

How did our holidaymakers travel and get around

The majority (93%) of Nordic holidaymakers travelled independently, 7% travelled as part of a package, and a third (34%) used a car while on the island of Ireland.

Car use	Share of trips
Hired a car	32%
Brought own car	1%
Borrowed a car/Other	2%
Did not use a car	66%

What were our holidaymakers' interest and activities?

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

89% visited historical or cultural sites.

Type of activity	Share of trips
Heritage centres	63%
Churches or cathedrals	62%
Castles or houses	62%
Monuments	55%
Museums or art galleries	46%
Ancient Celtic sites	30%

93% engaged in pastimes and events.

Type of activity	Share of trips
Shopping excluding food, drink, and souvenirs	65%
National parks including forests	57%
Gardens	45%
Festivals or cultural events including concerts	14%
Sporting events	2%
Traced roots	

37% participated in active pursuits.

Type of activity	Share of trips
Hiking including cross-country walking	34%
Equestrian	3%
Cycling	2%
Golf	2%
Water-based activities excluding fishing and swimming	2%
Fishing	

Likelihood to recommend a holiday in Ireland to others

The majority (80%) of Nordic holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (51%), the friendly people (39%) and good food (13%).

Outbound holidaymakers

Sources of inspiration, research and planning

Outbound holidaymakers 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.

Channel	Share of holidaymakers' inspiration
Family and friends' recommendations	44%
Online search	37%
Travel websites including company websites and booking platforms	28%
Destination websites	23%
Films, TV shows, travel shows	23%
Social media	23%
Travel articles, blogs	22%

Channel	Share of holidaymakers' research and planning
Online search	51%
Travel websites including company websites and booking platforms	40%
Destination websites	37%
Family and friends' recommendations	29%
Travel articles, blogs	24%
Guidebooks	23%
Social media	19%

Enrichment Explorers

Our target segment makes up 24% of all Global 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
2. To broaden and simulate their 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

Combined, the Nordics represented the world's sixth-largest outbound market in 2024 and 90% of all outbound trips from the Nordics were to other parts of Europe.

Access by air

There were 586 thousand direct one-way air seats available on 3,425 flights from the Nordics to the island of Ireland in 2024. There were 10 gateways from the Nordics, operated by 7 carriers to Dublin airport.

Where can our tourists fly from?

Copenhagen Kastrup (30%), Reykjavík (21%) and Stockholm (17%) accounted for the majority (67%) of seats in 2024. Denmark accounted for the largest (32%) share of seats among Nordic countries.

Airports in the Nordics	Share of seats
Copenhagen	30%
Reykjavík	21%
Stockholm	17%
Oslo	13%
Helsinki	11%
Rovaniemi	3%
Bergen	3%
Billund	2%
Goteborg	1%
Kittila	0.2%

Who can our tourists fly with?

Seven carriers operated between the Nordics and the island of Ireland. In 2024, SAS and Ryanair were responsible for delivering the majority (57%) of seats to the island of Ireland.

Carrier	Share of seats
SAS	34%
Ryanair	23%
Icelandair	12%
Finnair	11%
Fly Play	9%
Norwegian	8%
Wideroe	3%