

# NORDICS

## MARKET PROFILE

### 2024



## INBOUND TOURISTS

The island of Ireland welcomed around 175,000 Nordic tourists who spent over €162/£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.



## WHERE DID OUR TOURISTS COME FROM?

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



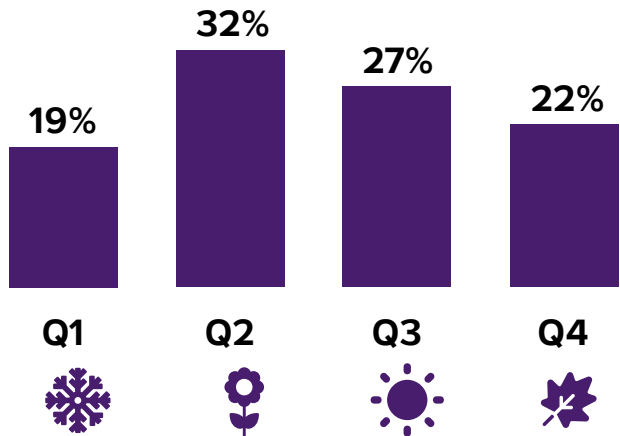
## WHERE DID OUR TOURISTS VISIT?



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

## WHEN DID OUR TOURISTS VISIT?





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



# INBOUND TOURISTS


## 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.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€81/£70m	50%	78k	45%	404k	37%
 VFR	€22/£19m	14%	45k	26%	304k	28%
 BUSINESS	€37/£32m	23%	39k	22%	188k	17%
 OTHER	€22/£19m	14%	15k	9%	195k	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.




€925/£805 (IOI)  
£364 (NI)

Av. spend per trip



€148/£129 (IOI)  
£86 (NI)

Av. spend per night









6.2 (IOI)  
4.2 (NI)

Av. stay (nights)

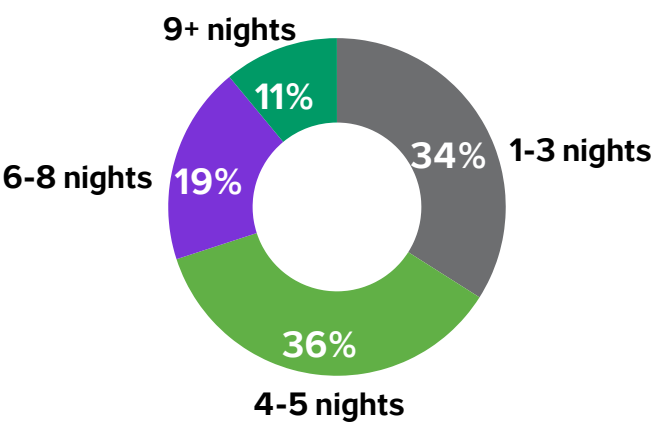
## HOW DID OUR TOURISTS SPEND THEIR MONEY?

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

Food & Drink  35%	Accomm.  29%	Shopping  19%
Transport  9%	Entertainment  7%	Misc.  1%

## HOW LONG DID OUR TOURISTS STAY?

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

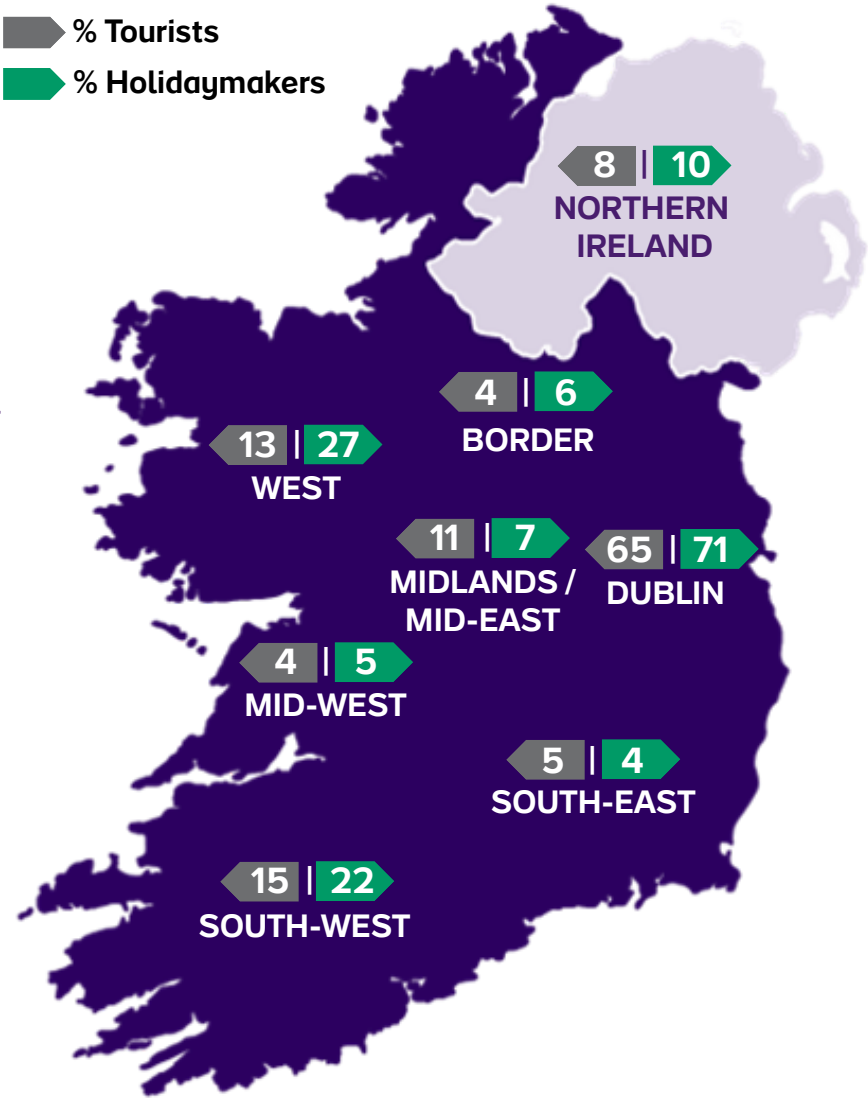


# INBOUND TOURISTS AND HOLIDAYMAKERS

## 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.

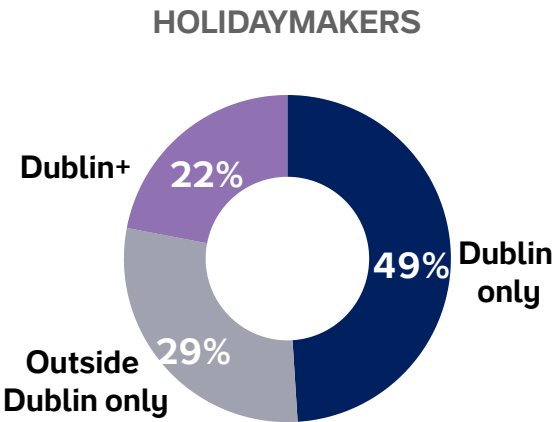
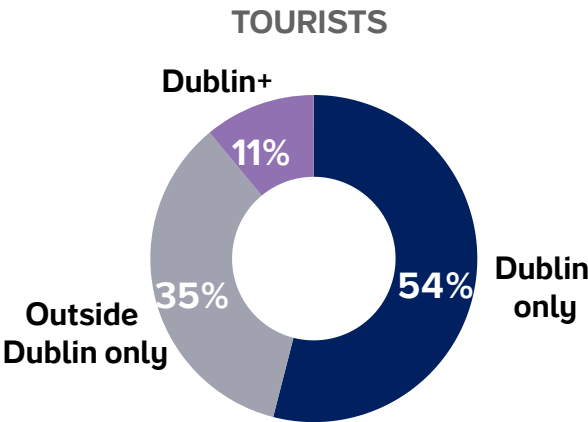
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	West
#3	West	South-West



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

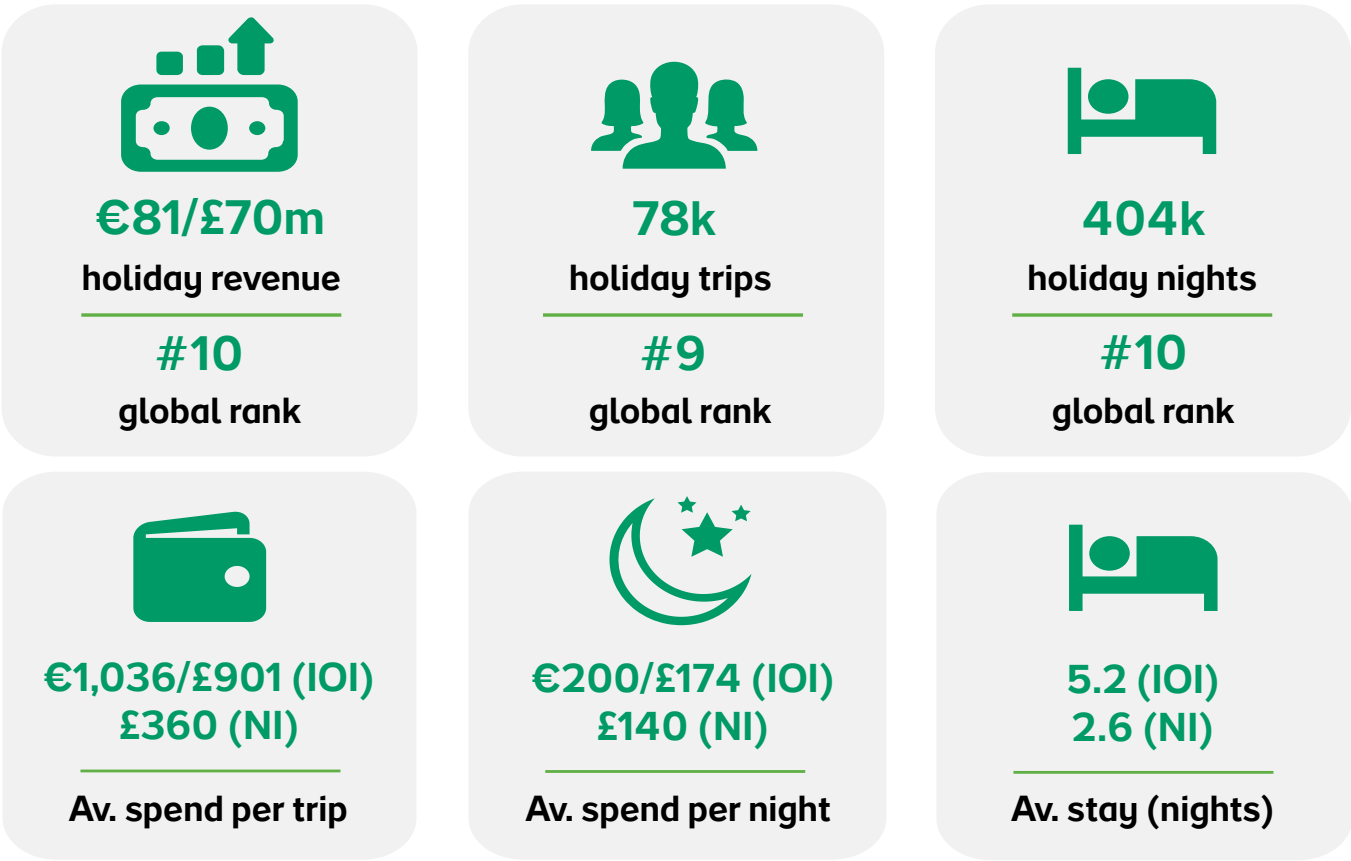
## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

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



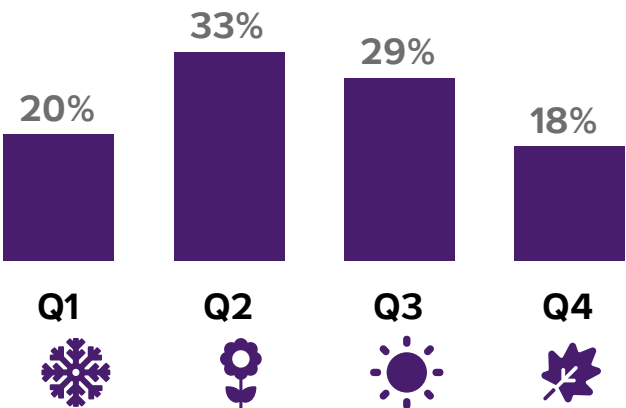
# INBOUND HOLIDAYMAKERS

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.



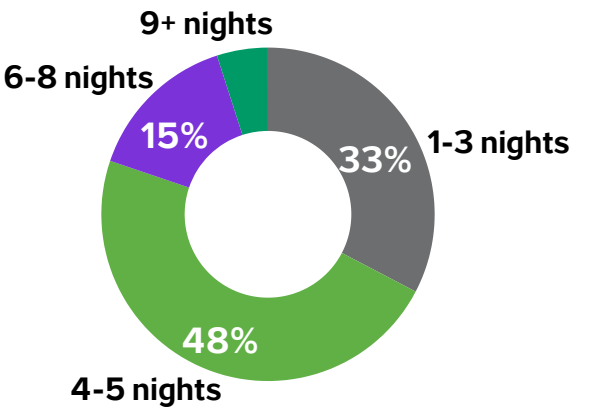
## WHEN DID OUR HOLIDAYMAKERS VISIT?

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



## HOW LONG DID OUR HOLIDAYMAKERS STAY?

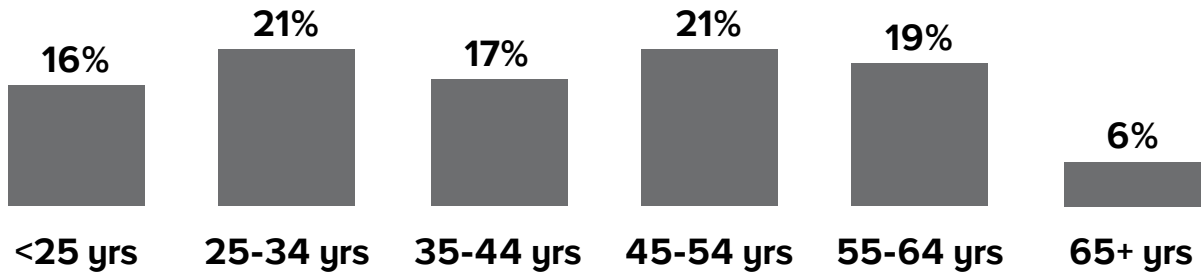
Half (48%) of Nordic holidaymakers stayed four to five nights on the island of Ireland and the majority (80%) stay less than 6 nights.



# INBOUND HOLIDAYMAKERS

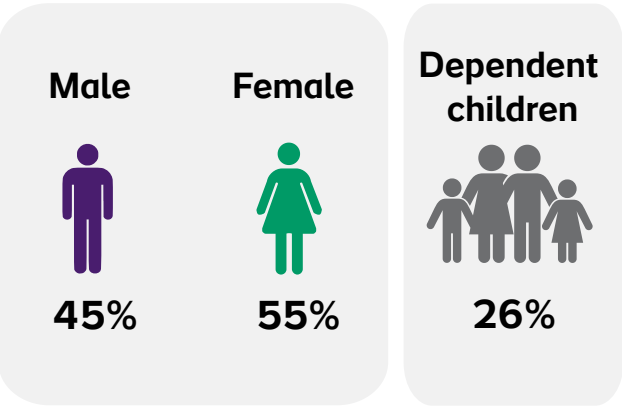
## WHAT AGE WERE OUR HOLIDAYMAKERS?

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



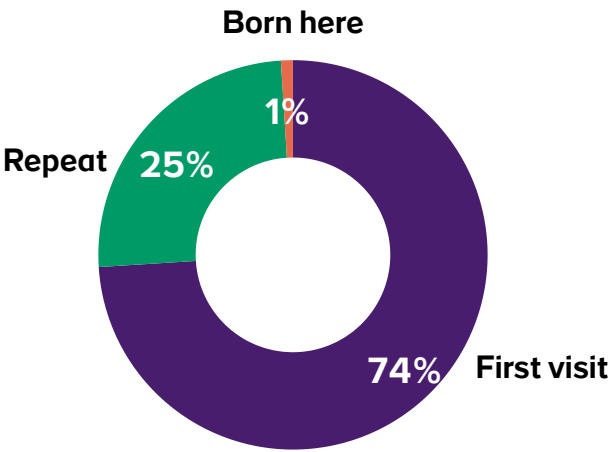
## HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

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



## HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

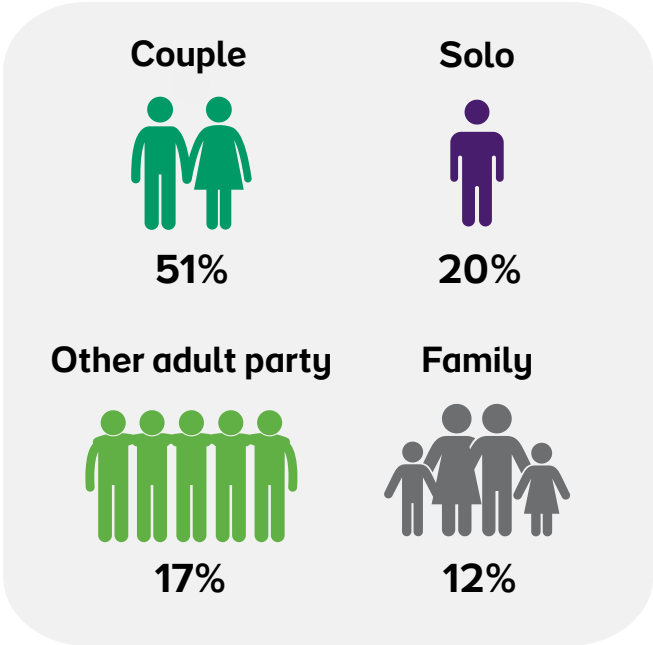
It was a first visit for three-quarters (74%) of Nordic holidaymakers.



## WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Half (51%) of Nordic holidaymakers travelled with their spouse/partner.

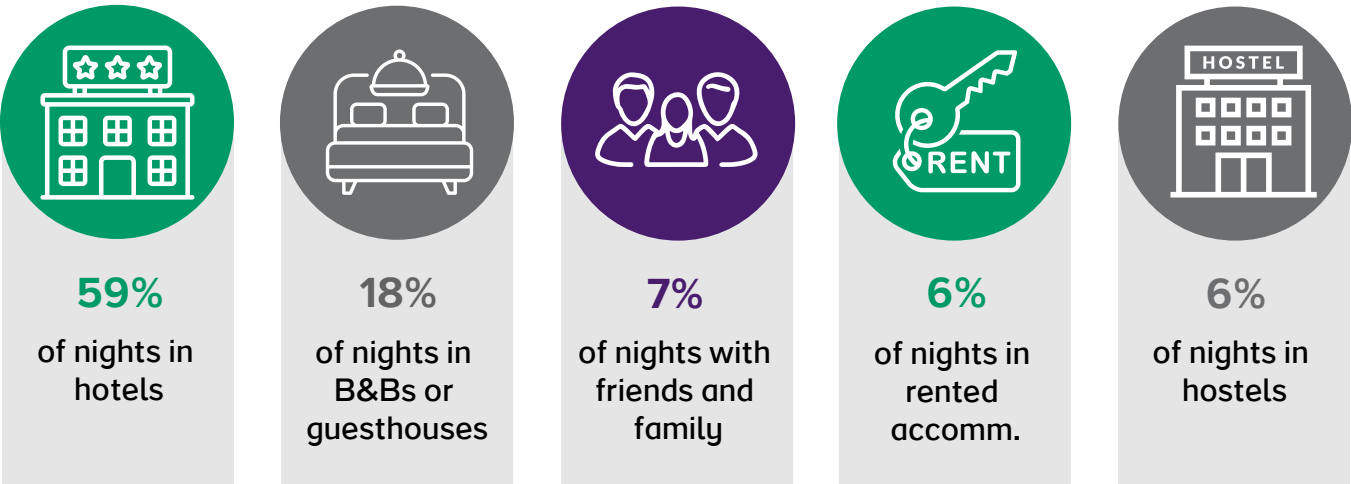
One-fifth (20%) visited on their own.



# INBOUND HOLIDAYMAKERS

## 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.



## HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

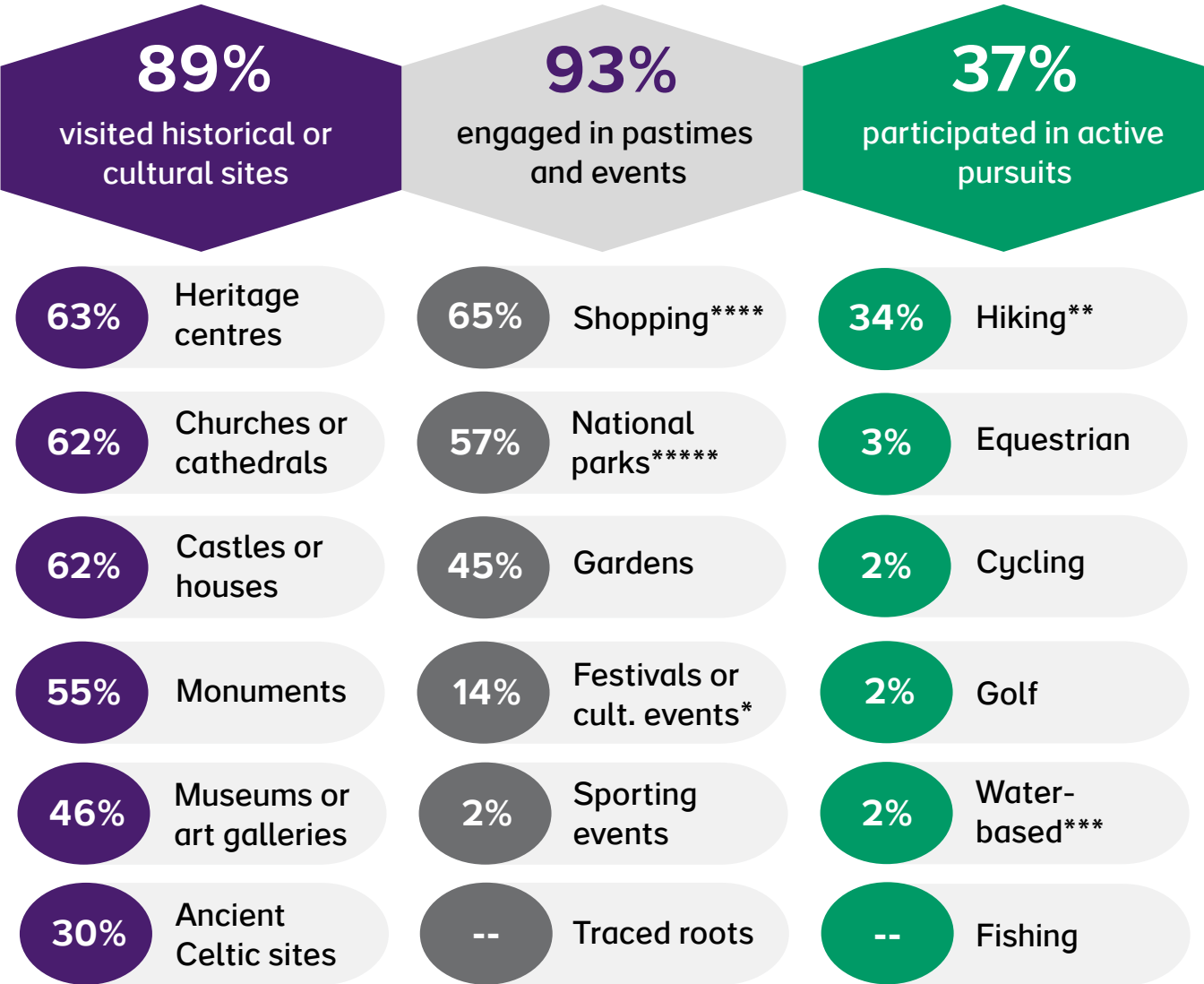
The majority (93%) of Nordic holidaymakers travelled independently and a third (34%) used a car while on the island of Ireland.



# INBOUND HOLIDAYMAKERS

## WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

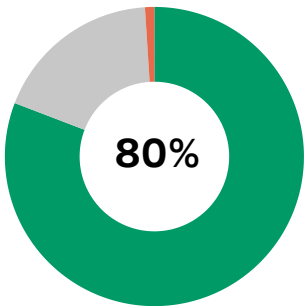
Nordic holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



\*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

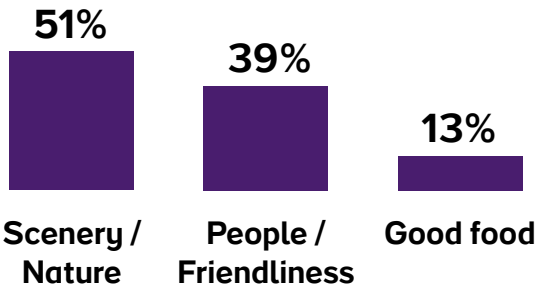
The majority (80%) of Nordic holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (51%), the friendly people (39%) and good food (13%).



**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

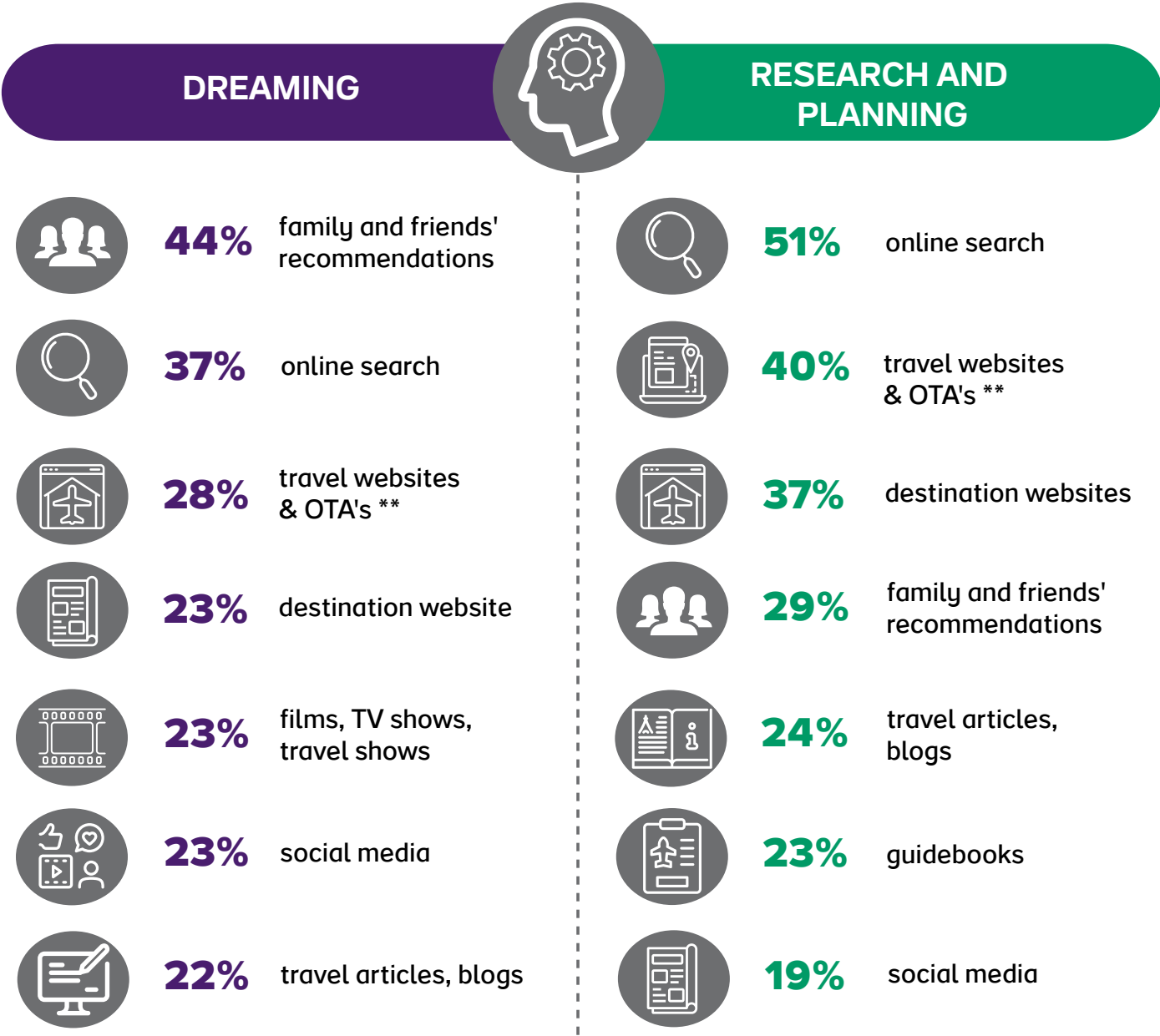


# OUTBOUND HOLIDAYMAKERS

## SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers 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.

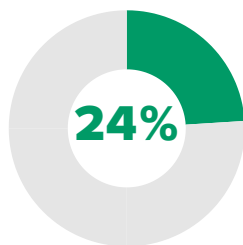


\*\*Travel websites include company websites and booking platforms

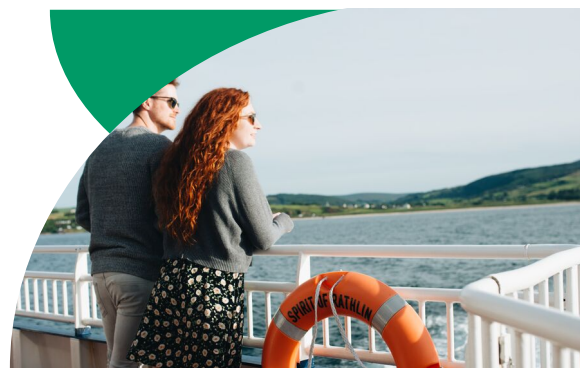


# ENRICHMENT EXPLORERS

## OUR TARGET SEGMENT



Global share of  
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            |

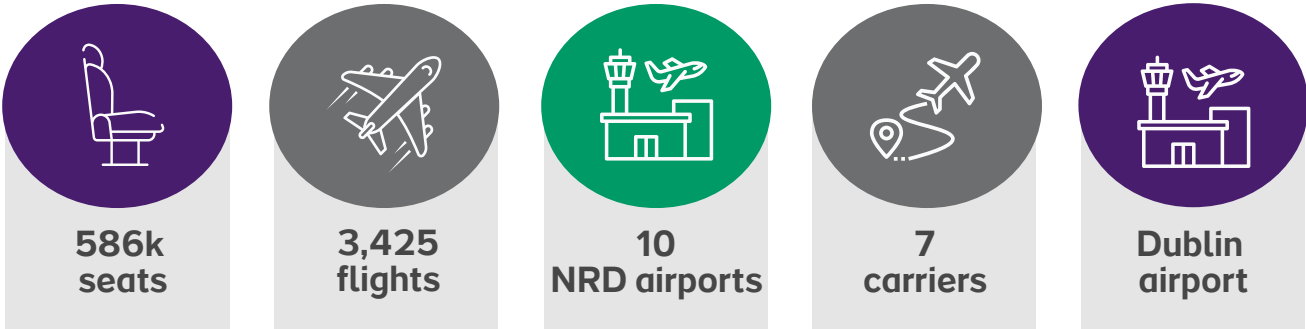


# OUTBOUND TOURISTS

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 almost 586,000 direct one-way air seats available on over 3,400 flights from the Nordics to the island of Ireland in 2024. There were ten gateways from the Nordics to Dublin airport serviced by seven carriers.



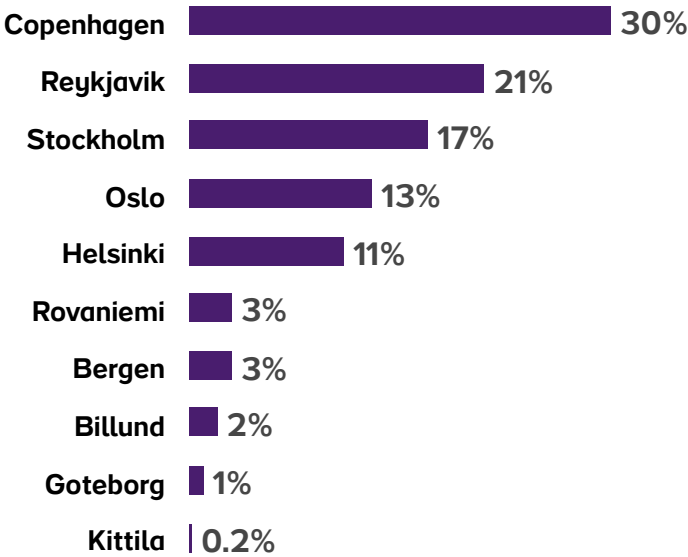
### WHERE CAN OUR TOURISTS FLY FROM?

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.

### 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.

Share of seats by airport



Share of seats by carrier

