

NORDICS

MARKET PROFILE 2025



INBOUND TOURISTS

In 2025, the island of Ireland welcomed 147,000 Nordic tourists, who spent €112/£98 million and stayed 877,000 nights. The Nordics were the island's tenth-largest overseas market by spend and tourist numbers and eleventh-largest source of nights.

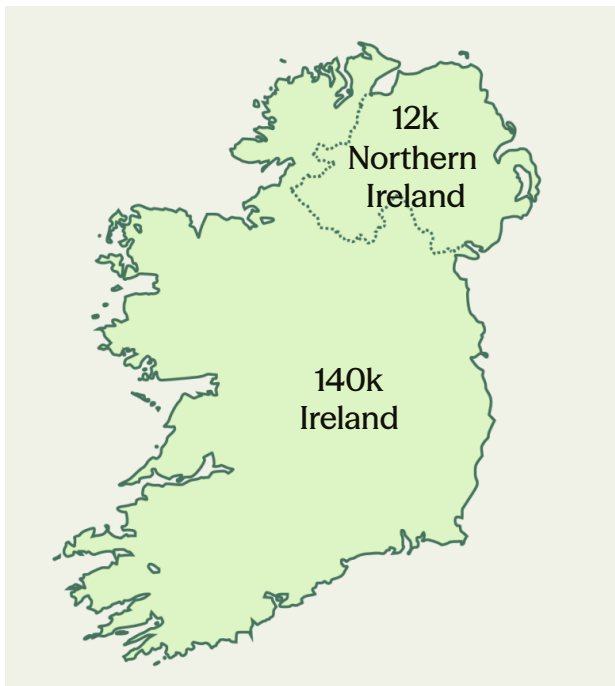


WHERE DID OUR TOURISTS COME FROM?

Denmark and Sweden are the largest Nordic markets, each contributing around three in ten visitors, with Norway contributing a further 22%.

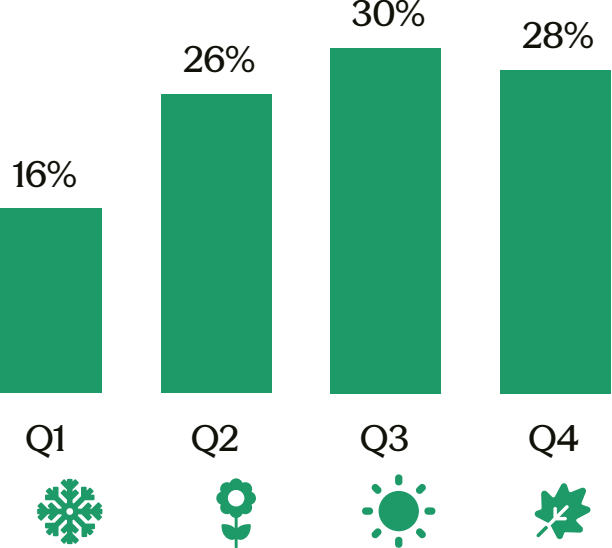
Denmark	Sweden	Norway	Finland	Iceland
31%	30%	22%	14%	2%

WHERE DID OUR TOURISTS VISIT?



WHEN DID OUR TOURISTS VISIT?

Nordic tourism was strongest during the second half of the year, with almost three-fifths (58%) of visits taking place between July and December.



INBOUND TOURISTS

WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Holiday travel remained the primary reason for Nordic visits to the island of Ireland, accounting for almost half (47%) of trips and over half (51%) of tourism revenue.

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€57/£50m	51%	69k	47%	327k	37%
	VFR	€17/£15m	15%	41k	28%	265k	30%
	BUSINESS	€22/£19m	20%	27k	19%	126k	14%
	OTHER	€16/£13m	14%	10k	7%	158k	18%

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

In 2025, Nordic tourists stayed an average of 6 nights on the island of Ireland and spent €766/£666 per trip, equivalent to €128/£111 per night,



€766/£666 (IOI)
£317 (NI)

Av. spend per trip



€128/£111 (IOI)
£78 (NI)

Av. spend per night



6.0 (IOI)
4.0 (NI)

Av. stay (nights)

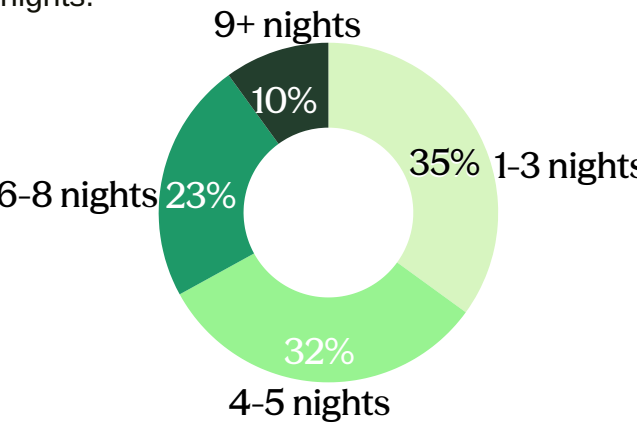
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Food and drink represented the largest share of Nordic tourist spend, at 34%, ahead of accommodation and all other trip costs.

Food & Drink	Accomm.	Shopping
		
34%	27%	20%
Transport	Entertainment	Misc.
		
10%	8%	1%

HOW LONG DID OUR TOURISTS STAY?

Around two thirds (67%) visited the island of Ireland for a short break of up to five nights.



INBOUND TOURISTS AND HOLIDAYMAKERS

WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

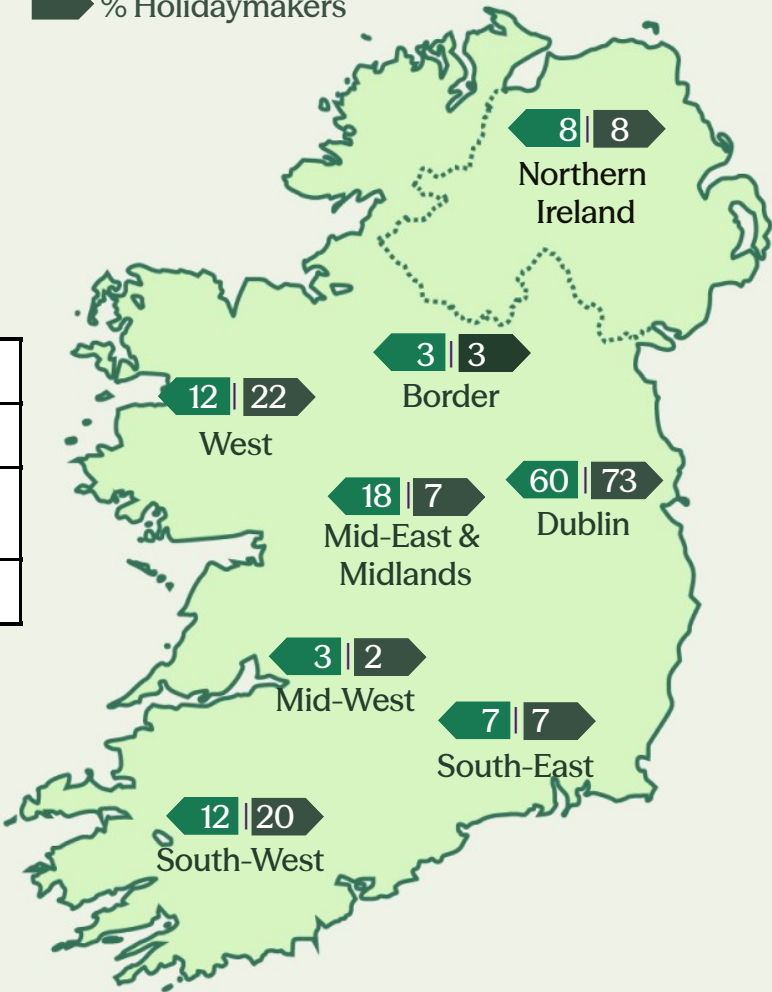
Dublin and the South-West featured in the top three destinations for Nordic tourists and holidaymakers.

% Tourists

% Holidaymakers

Almost 6,000 Nordic tourists and 3,000 holidaymakers overnighted on both sides of the border.

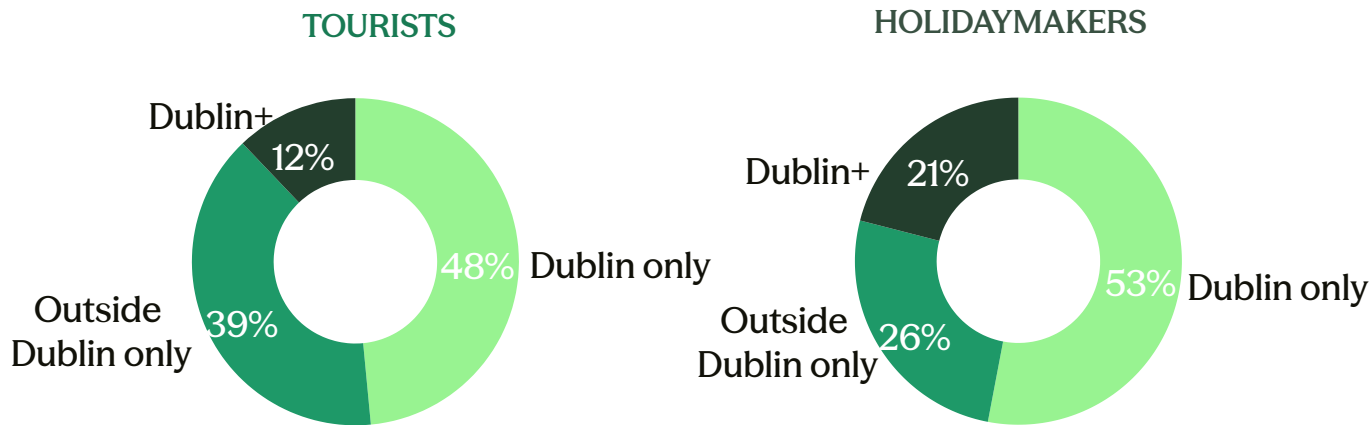
Top	Tourists	Holidaymakers
1	Dublin	Dublin
2	Mid-East & Midlands	West
3	South-West	South-West



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

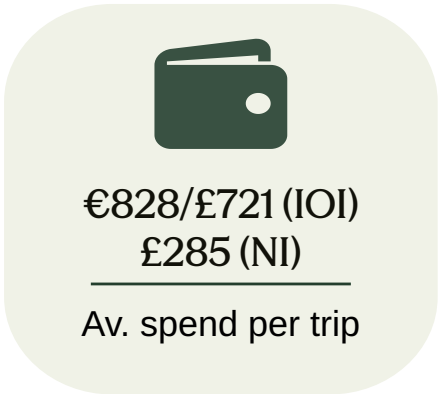
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin featured in the majority of Nordic itineraries, visited by 60% of tourists and 73% of holidaymakers



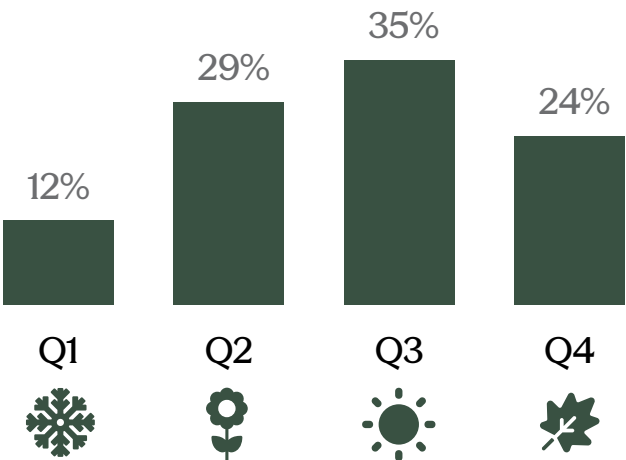
INBOUND HOLIDAYMAKERS

The Nordics remained an important holiday market for the island of Ireland in 2025, ranking tenth for holiday revenue, holiday trips and holiday nights. Nordic holidaymakers typically came for short breaks, staying an average of 4.7 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 2.8 nights.



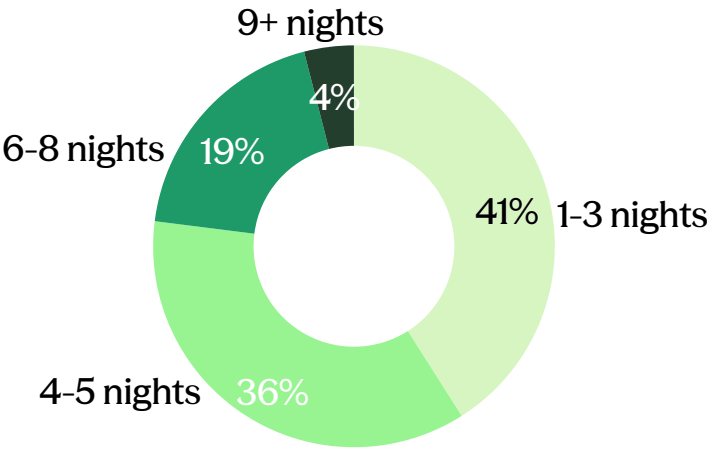
WHEN DID OUR HOLIDAYMAKERS VISIT?

Summer remained the key travel period for Nordic holidaymakers, with almost two-thirds (64%) visiting between April and September.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

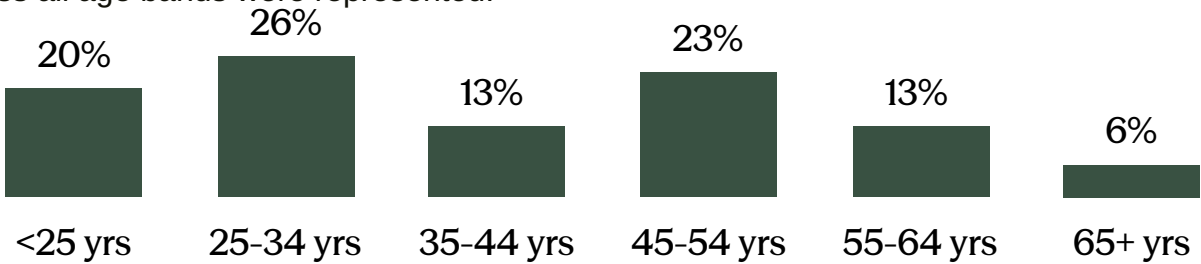
Short breaks were most popular, with three in four (77%) Nordic holidaymakers staying for up to five nights.



INBOUND HOLIDAYMAKERS

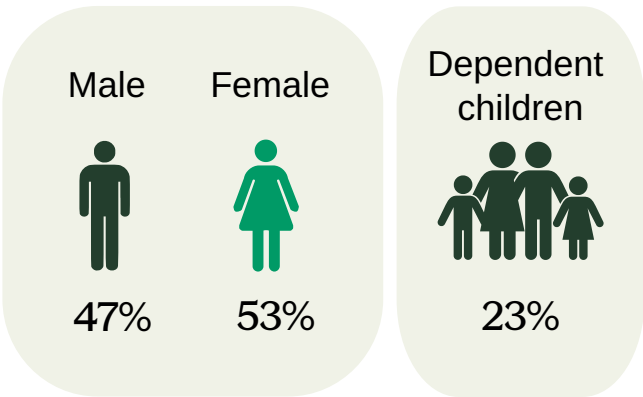
WHAT AGE WERE OUR HOLIDAYMAKERS?

Almost half of all Nordic holidaymakers (46%) were aged under 35, though a good spread across all age bands were represented.



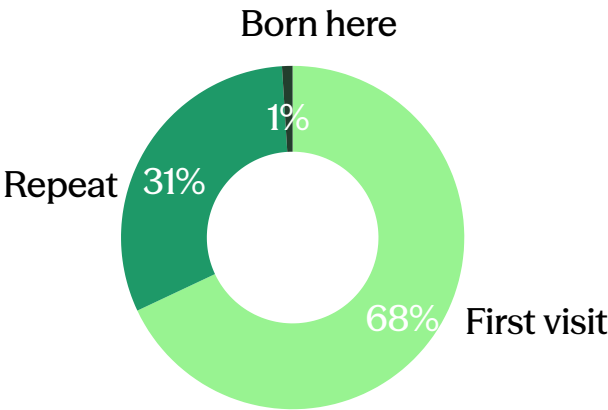
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN*

Around one in four Nordic holidaymakers visiting the island of Ireland (23%) had dependent children in their household.



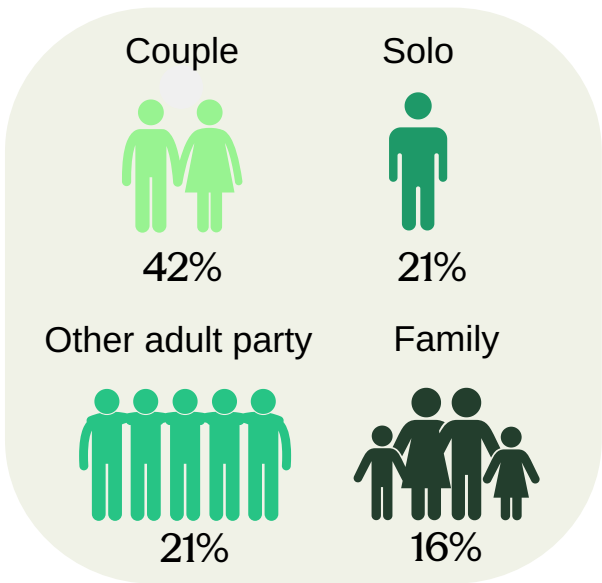
HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

For more than two-thirds (68%) of Nordic holidaymakers, 2025 marked their first visit to the island of Ireland.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Couples represented the largest travel party type, accounting for just under two-fifths (42%) of Nordic holidaymakers, twice as many travelling solo (21%) or with other adults (21%).



INBOUND HOLIDAYMAKERS

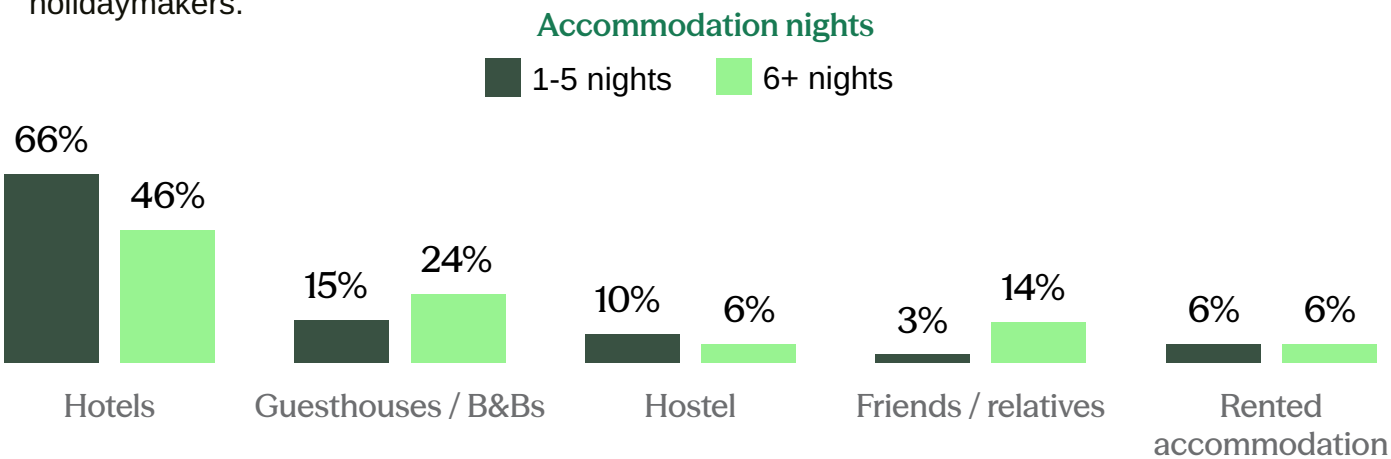
WHERE DID OUR HOLIDAYMAKERS STAY?

Hotels remained the preferred accommodation type among Nordic holidaymakers, accounting for over half (56%) of all nights spent on the island of Ireland.



HOW DID ACCOMMODATION CHOICE VARY BY LENGTH OF STAY?*

Although hotels accounted for the largest share of Nordic holiday nights on the island of Ireland, they were especially dominant for short breaks (1- 5 nights) while guesthouses and B&Bs and staying with friends and family had a higher share of nights for longer-staying holidaymakers.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?*

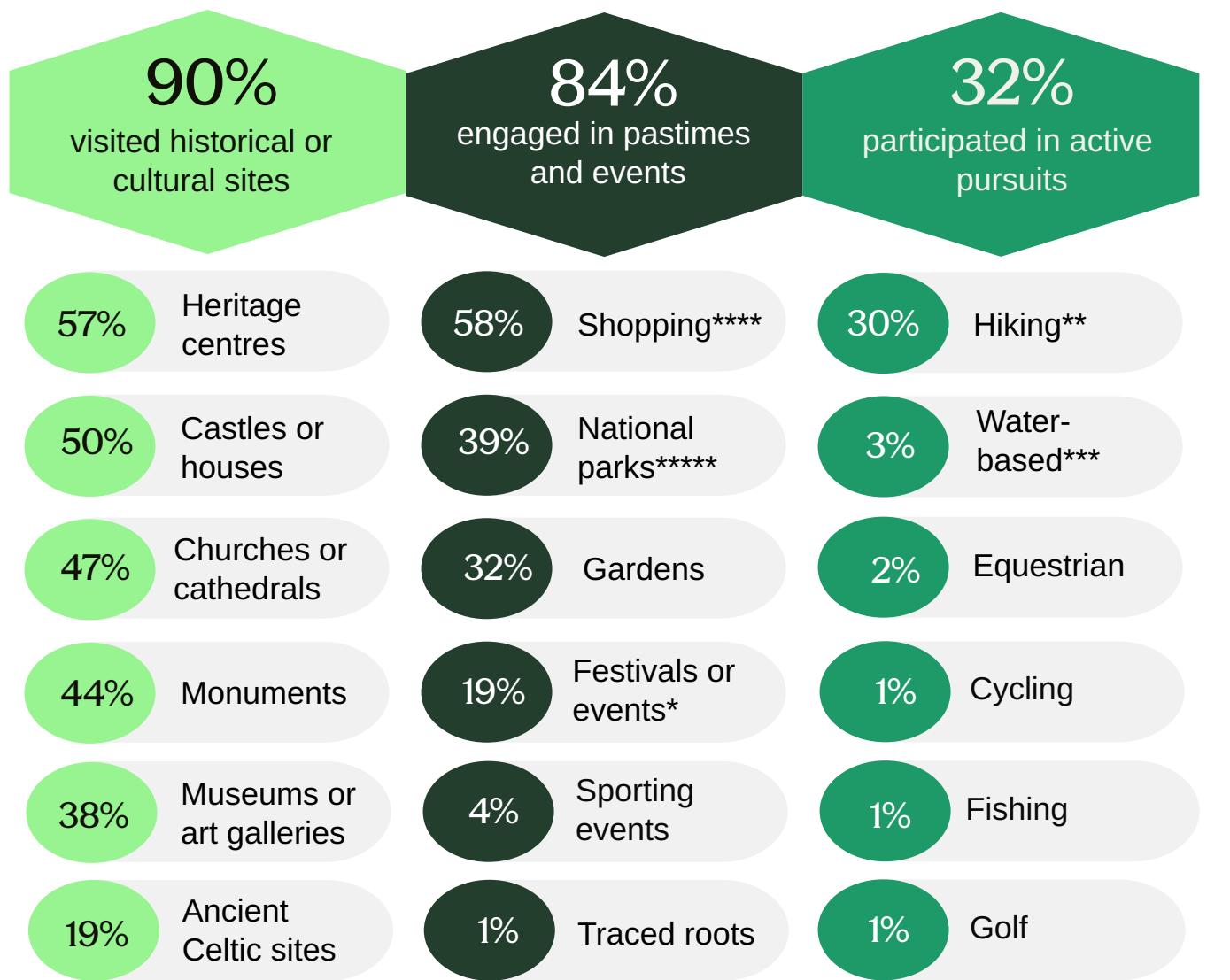
Independent travel dominated the market, with almost all Nordic holidaymakers (96%) organising their trip independently.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?*

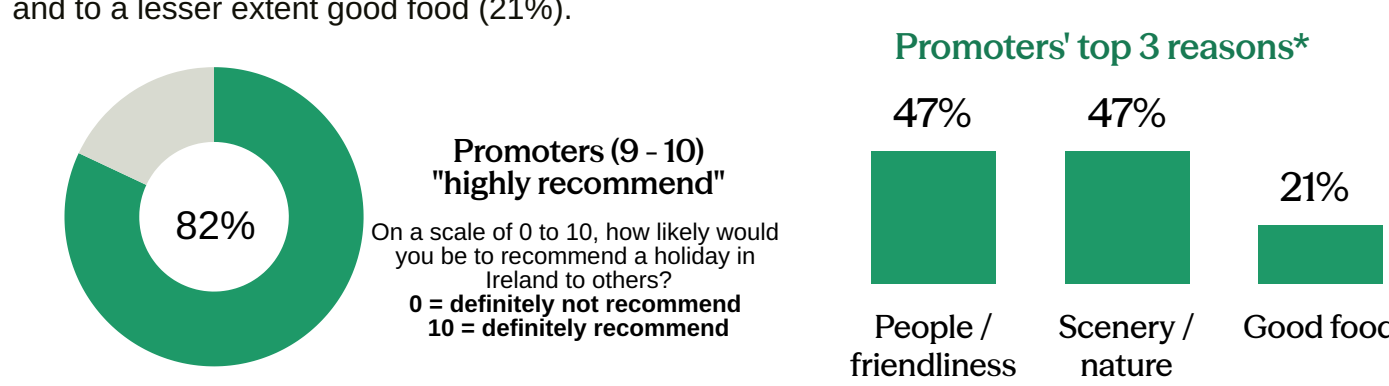
Nordic holidaymakers are highly engaged visitors, combining cultural sightseeing with a broad range of recreational and outdoor activities during their trip



*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

Four in five Nordic holidaymakers would recommend a holiday on the island of Ireland to others. The main reasons given are the friendly people (47%), our scenery and nature (47%) and to a lesser extent good food (21%).



OUTBOUND HOLIDAYMAKERS

SOURCES OF INSPIRATION, RESEARCH AND PLANNING

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

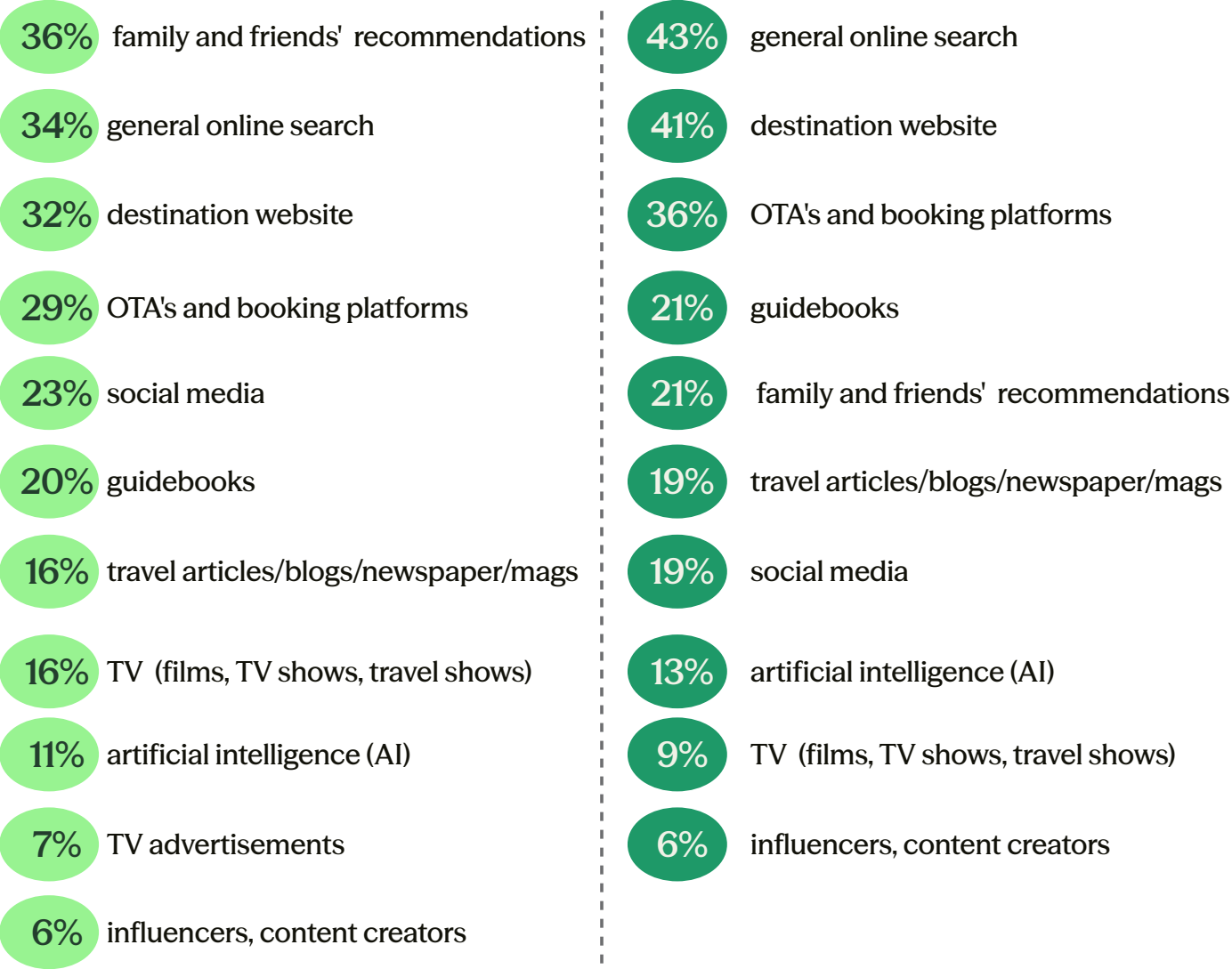
While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.

Recommendations from friends and family was the most influential source of travel inspiration

General online search was the most important tool used when planning their trip

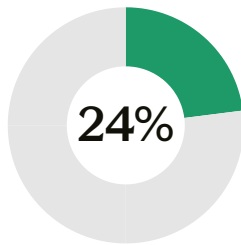


BASED ON RESPONDENTS' TOP 3 SOURCES

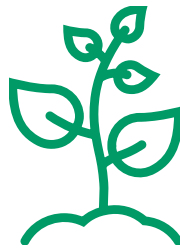


ENRICHMENT EXPLORERS

OUR TARGET SEGMENT



of Nordic
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

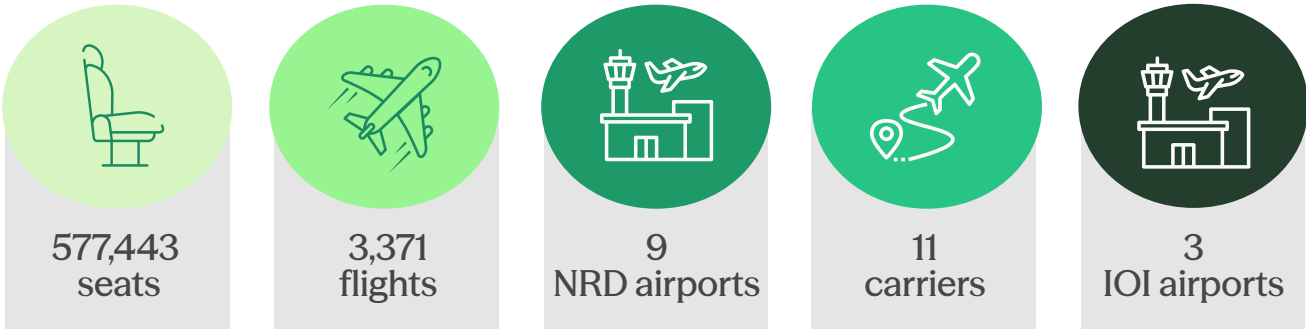
- | | | | | | |
|---|---|--|----|---|---|
| 1 |  | To feel connected to nature | 6 |  | To experience living like a local |
| 2 |  | To broaden and stimulate my mind | 7 |  | To enjoy authentic moments with friendly locals |
| 3 |  | To feel the character of the place and people | 8 |  | To be transported 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, the Nordics was the world’s eighth-largest outbound market, with X% of its outbound trips going to other parts of Europe.

ACCESS BY AIR

More than 577,000 direct one-way seats connected the Nordics and the island of Ireland in 2025, delivered across over 3,300 flights from nine Nordic gateways.



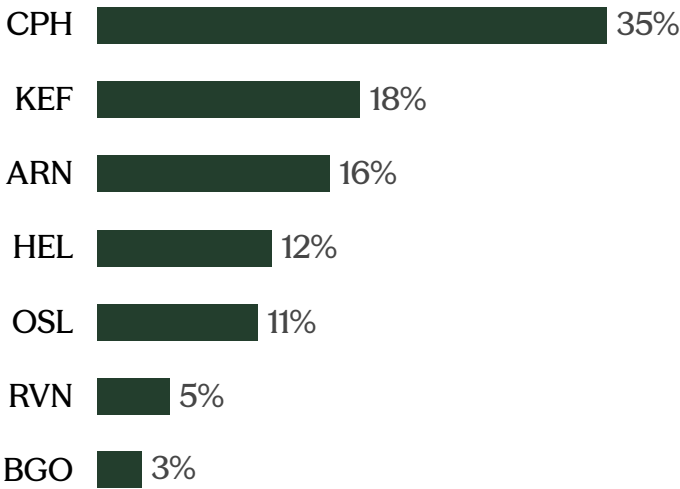
WHERE CAN OUR TOURISTS FLY FROM?

Copenhagen, Reykjavík and Stockholm were the principal Nordic gateways, together accounting for around 70% of available seat capacity.

WHO CAN OUR TOURISTS FLY WITH?

Eleven carriers operated between the Nordics and the island of Ireland. In 2025, SAS and Ryanair remained the dominant carriers serving the market, together providing almost three-fifths (59%) of available seat capacity.

SHARE OF SEATS BY AIRPORT (TOP 10)



CPH – Copenhagen Kastrup Airport;
KEF – Reykjavík Keflavík International Airport;
ARN – Stockholm Arlanda Airport;
HEL – Helsinki-Vantaa Airport; OSL – Oslo Gardermoen Airport
RVN – Rovaniemi Airport; BGO – Bergen Airport

SHARE OF SEATS BY CARRIER

