

NORDICS

MARKET PROFILE

2023



INBOUND TOURISTS

The island of Ireland welcomed around 154,000 Nordic tourists who spent over €107/£93 million and stayed 850,000 nights. The Nordics were the island's ninth-largest source of overseas tourists and the tenth-largest source of overseas revenue.



WHERE DID OUR TOURISTS COME FROM?

Two-thirds (67%) of Nordic tourists came from Sweden (36%) and Denmark (31%).



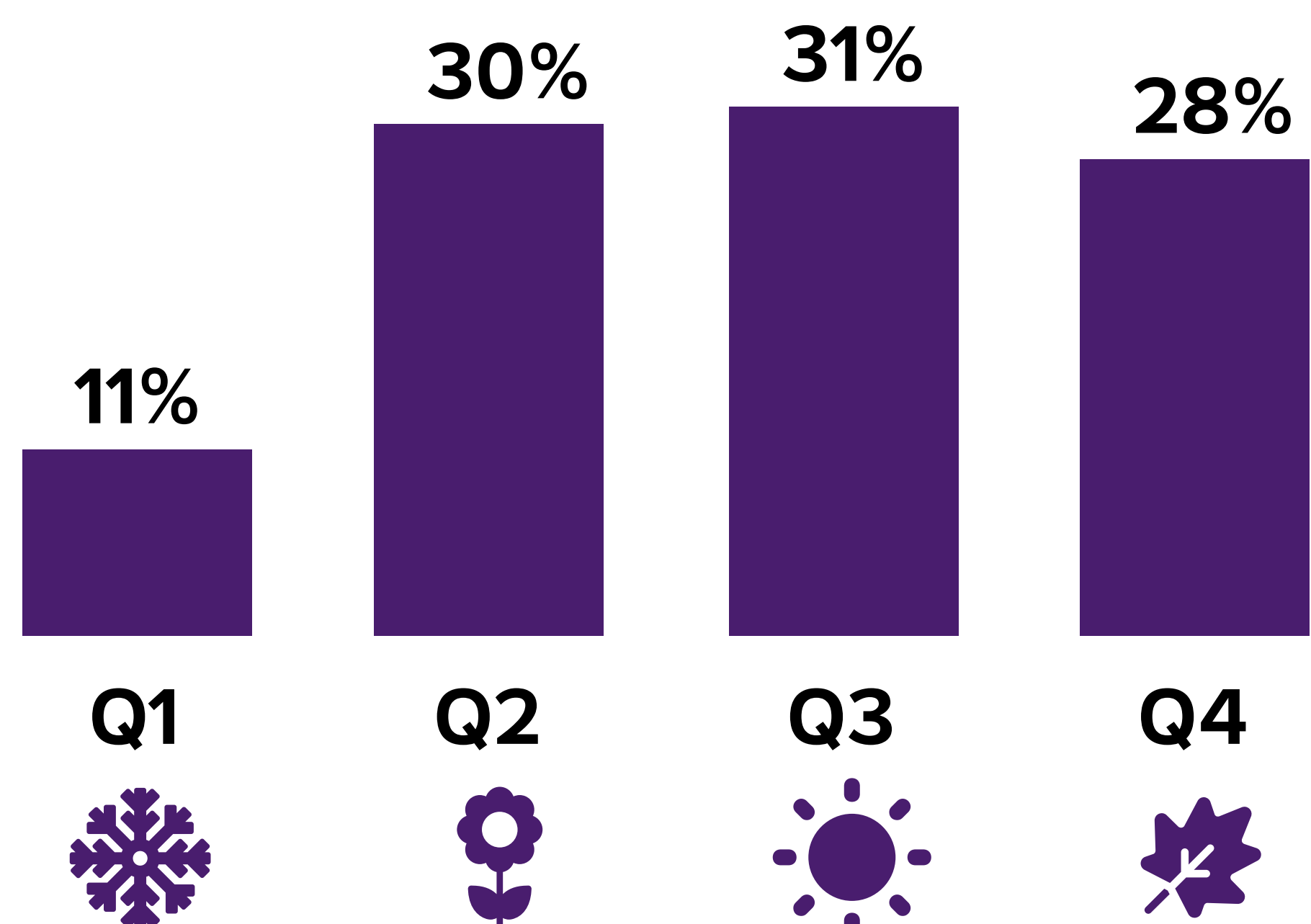
WHERE DID OUR TOURISTS VISIT?



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

WHEN DID OUR TOURISTS VISIT?





Nordic tourists' trips to the island of Ireland were evenly spread among the last three quarters of 2023.



INBOUND TOURISTS

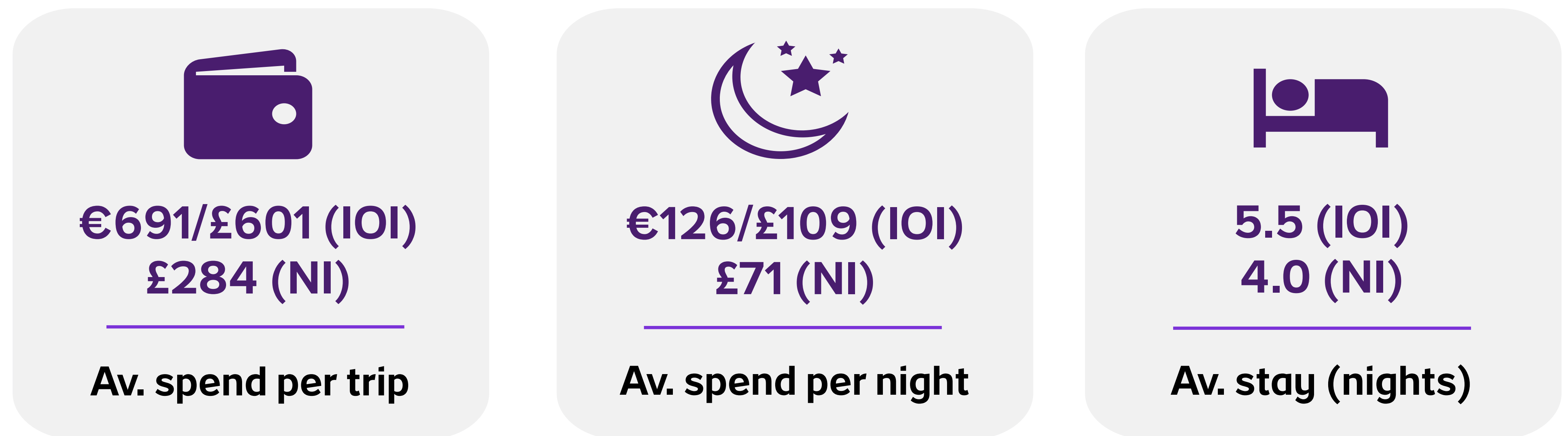
WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Almost two-fifths (38%) of Nordic tourists visiting the island of Ireland came for a holiday, accounting for 47% of Nordic tourism revenue. Nearly a quarter (23%) were visiting for business-related reasons, accounting for the second largest share (25%) of Nordic tourism revenue.

	REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
 HOLIDAY	€50/£44m	47%	58k	38%	317k	37%
 VFR	€21/£18m	20%	50k	32%	327k	38%
 BUSINESS	€27/£23m	25%	36k	23%	126k	15%
 OTHER	€8/£7m	8%	11k	7%	79k	9%

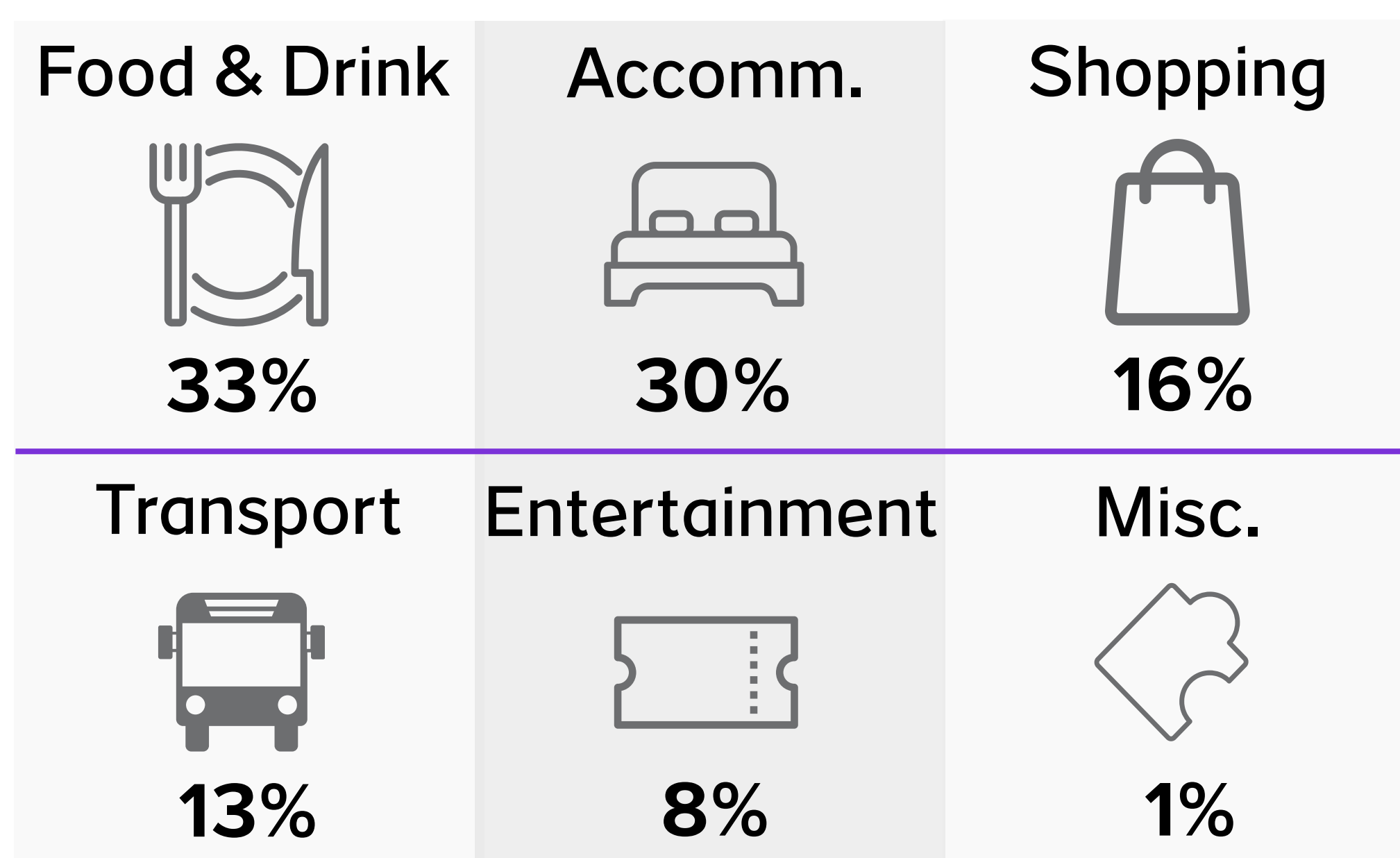
HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average, Nordic tourists spent €691/£601 per trip or €126/£109 per night and stayed 5.5 nights on the island of Ireland.



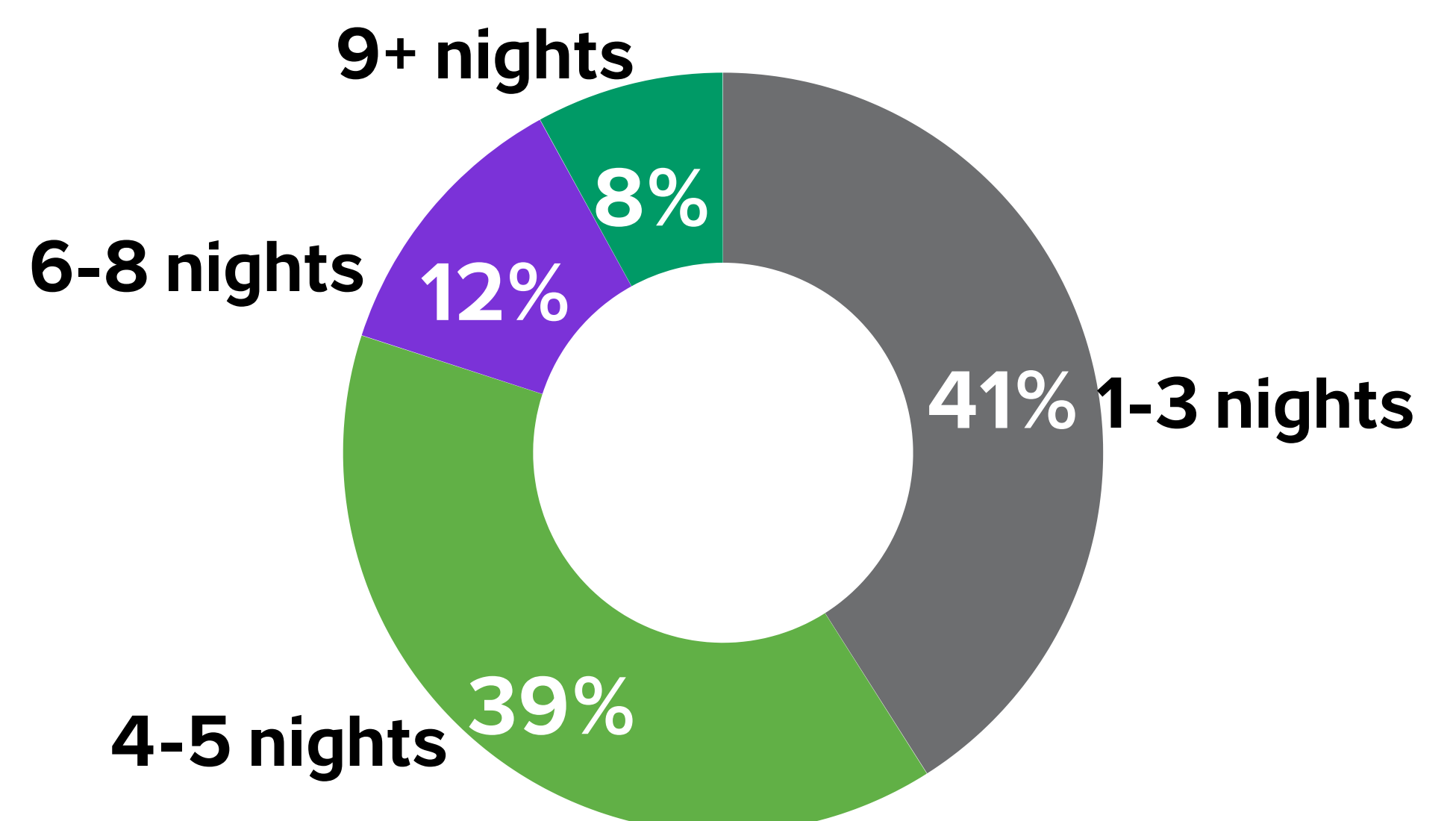
HOW DID OUR TOURISTS SPEND THEIR MONEY?

A third (33%) of Nordic tourists' revenue was spent on food and drink.



HOW LONG DID OUR TOURISTS STAY?

Four-in-five (80%) stayed up to five nights on the island of Ireland.



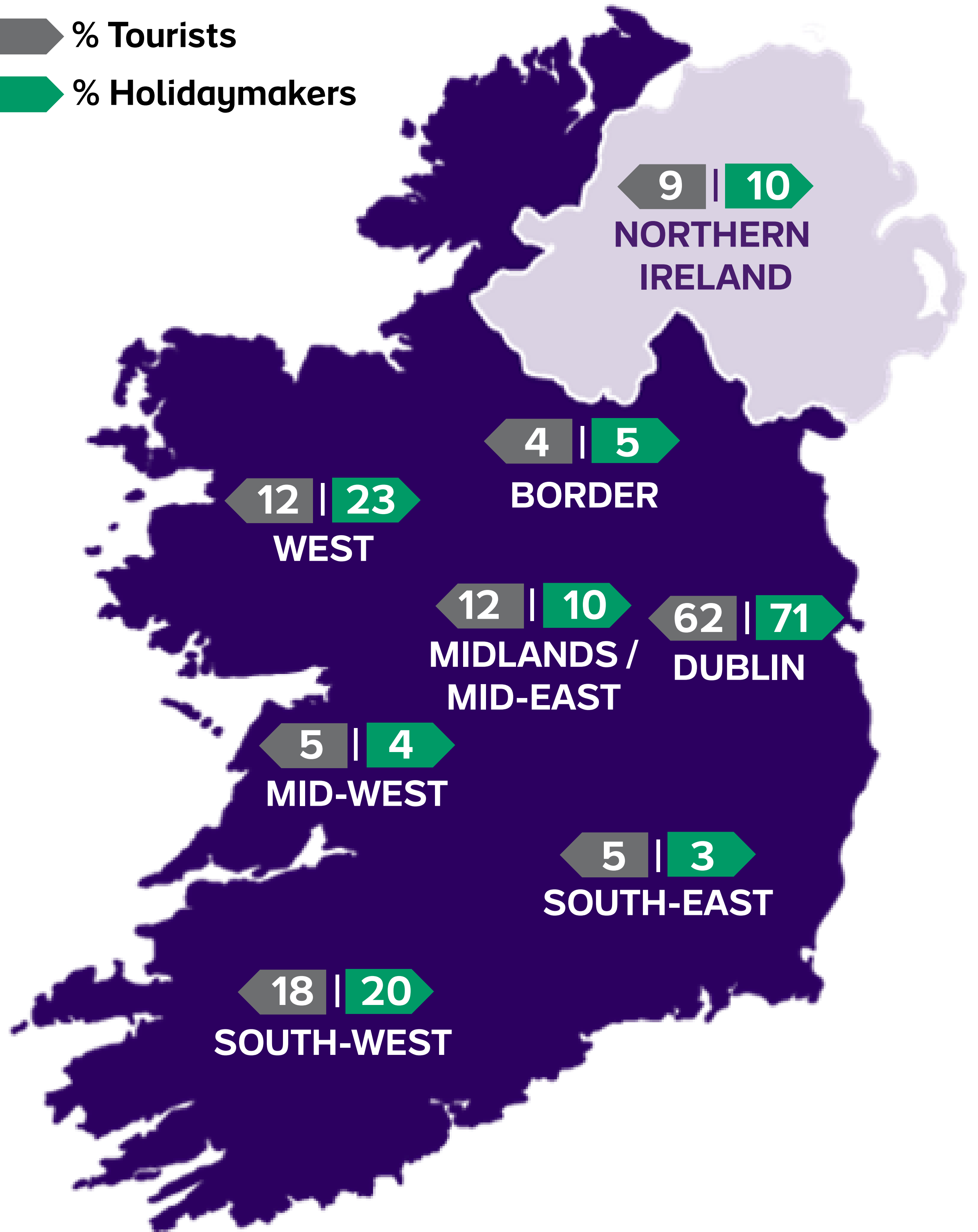
INBOUND TOURISTS AND HOLIDAYMAKERS

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.

➤ % Tourists
➤ % Holidaymakers

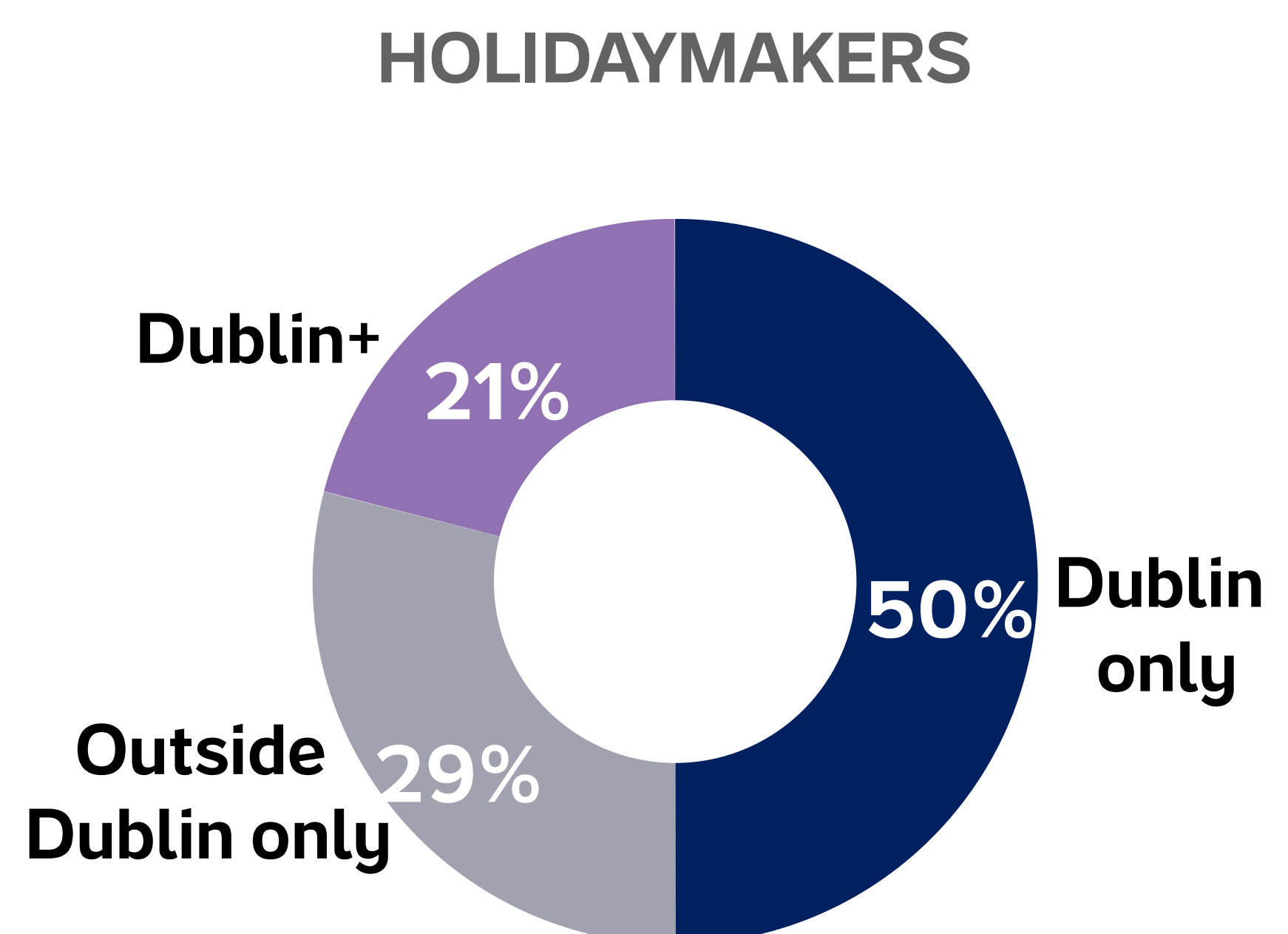
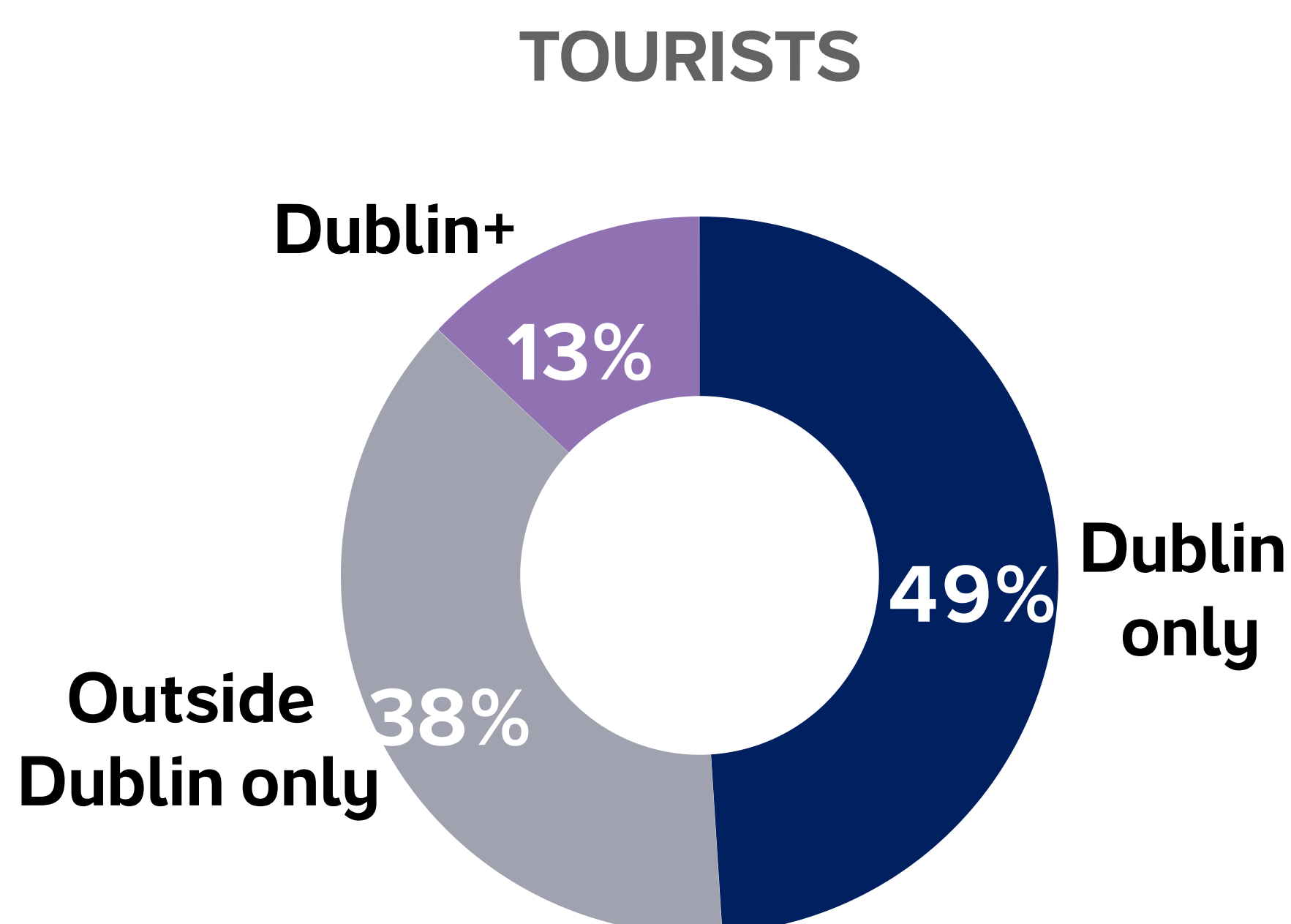
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	West
#3	West	South-West



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

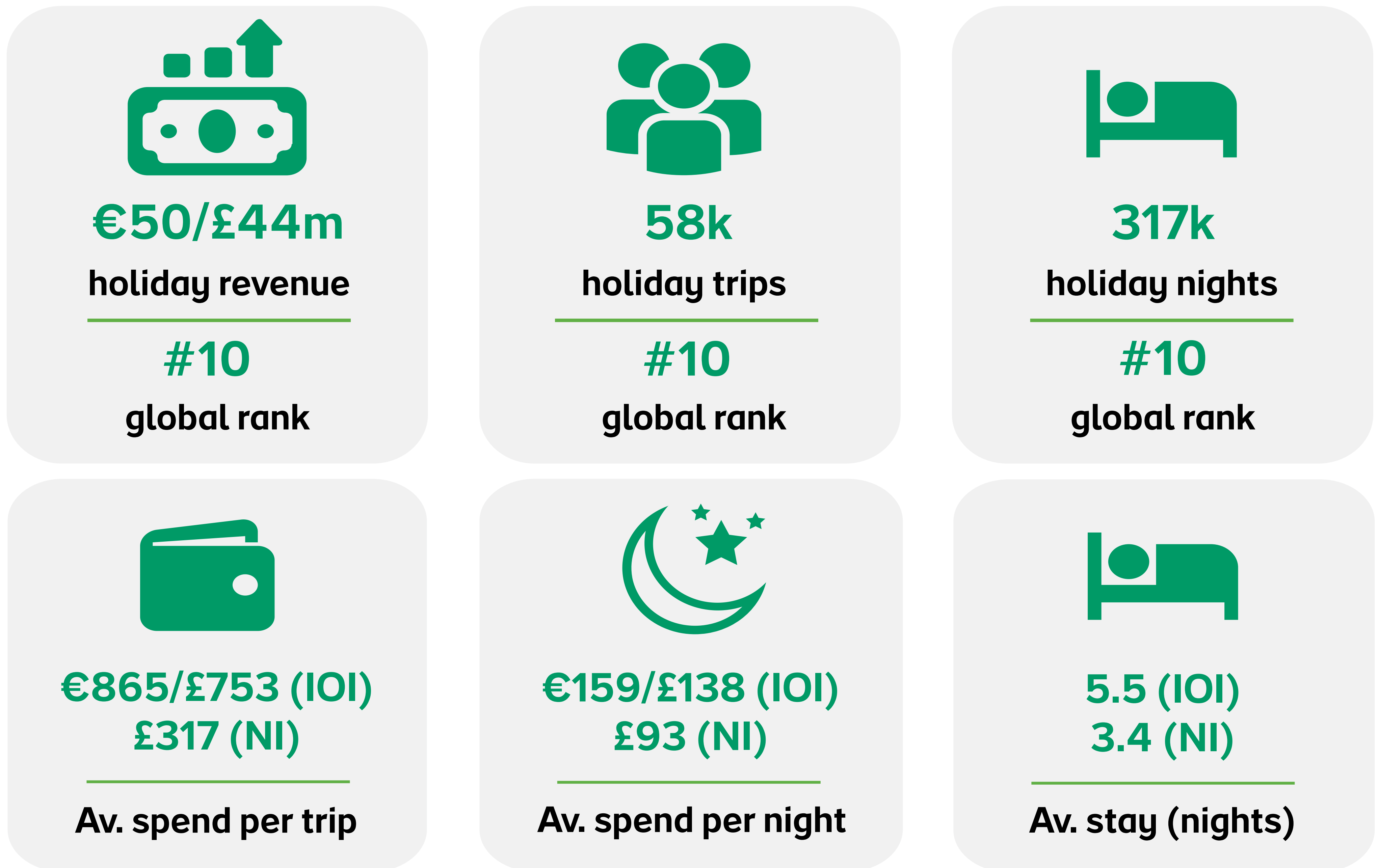
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Nordic tourists (62%) and holidaymakers (71%).



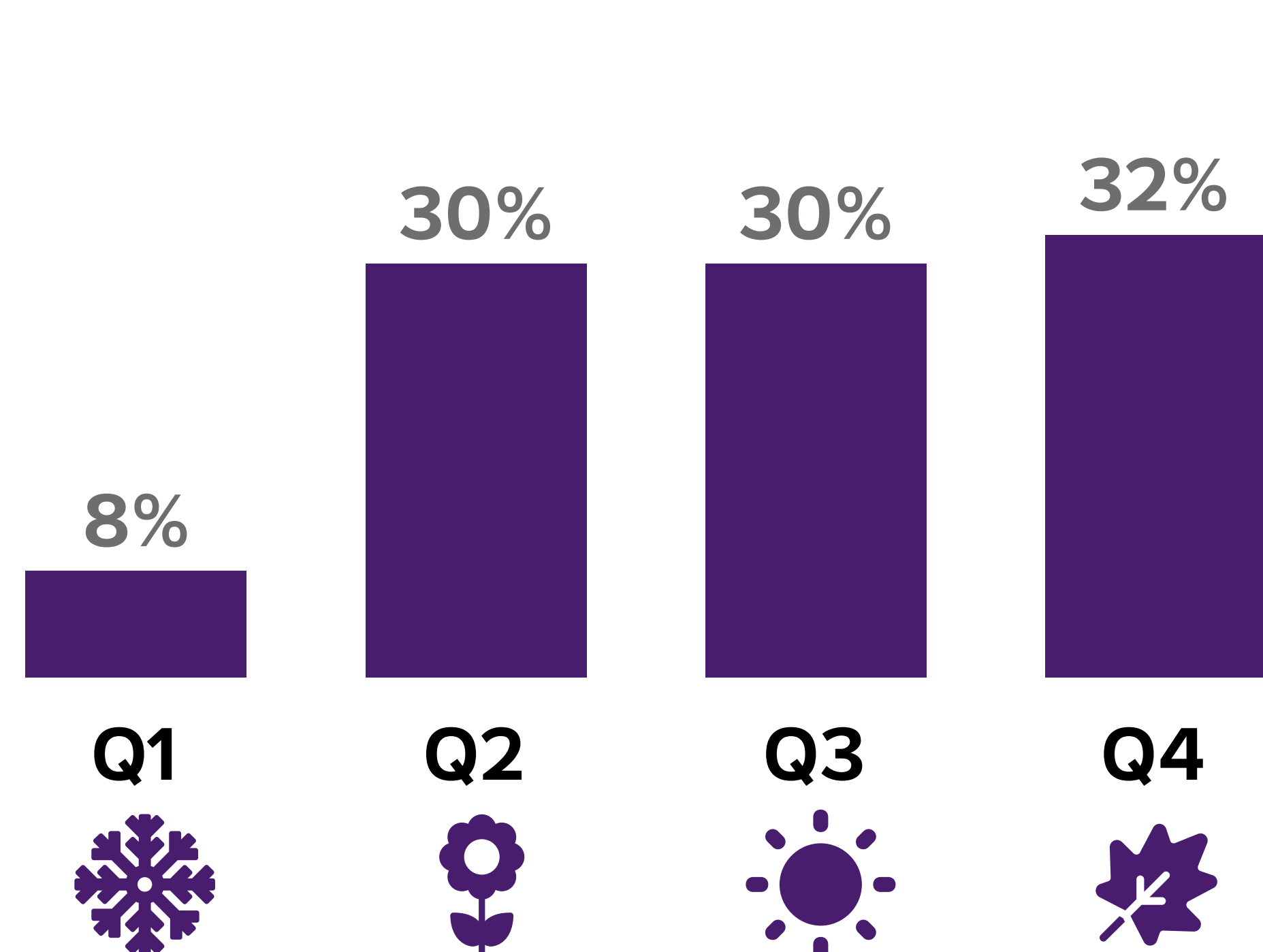
INBOUND HOLIDAYMAKERS

The Nordics were the island of Ireland's tenth-largest source of holiday revenue, holidaymakers and holiday nights. Nordic holidaymakers stayed for an average of 5.5 nights on the island of Ireland. Those visiting Northern Ireland stayed an average of 3.4 nights.



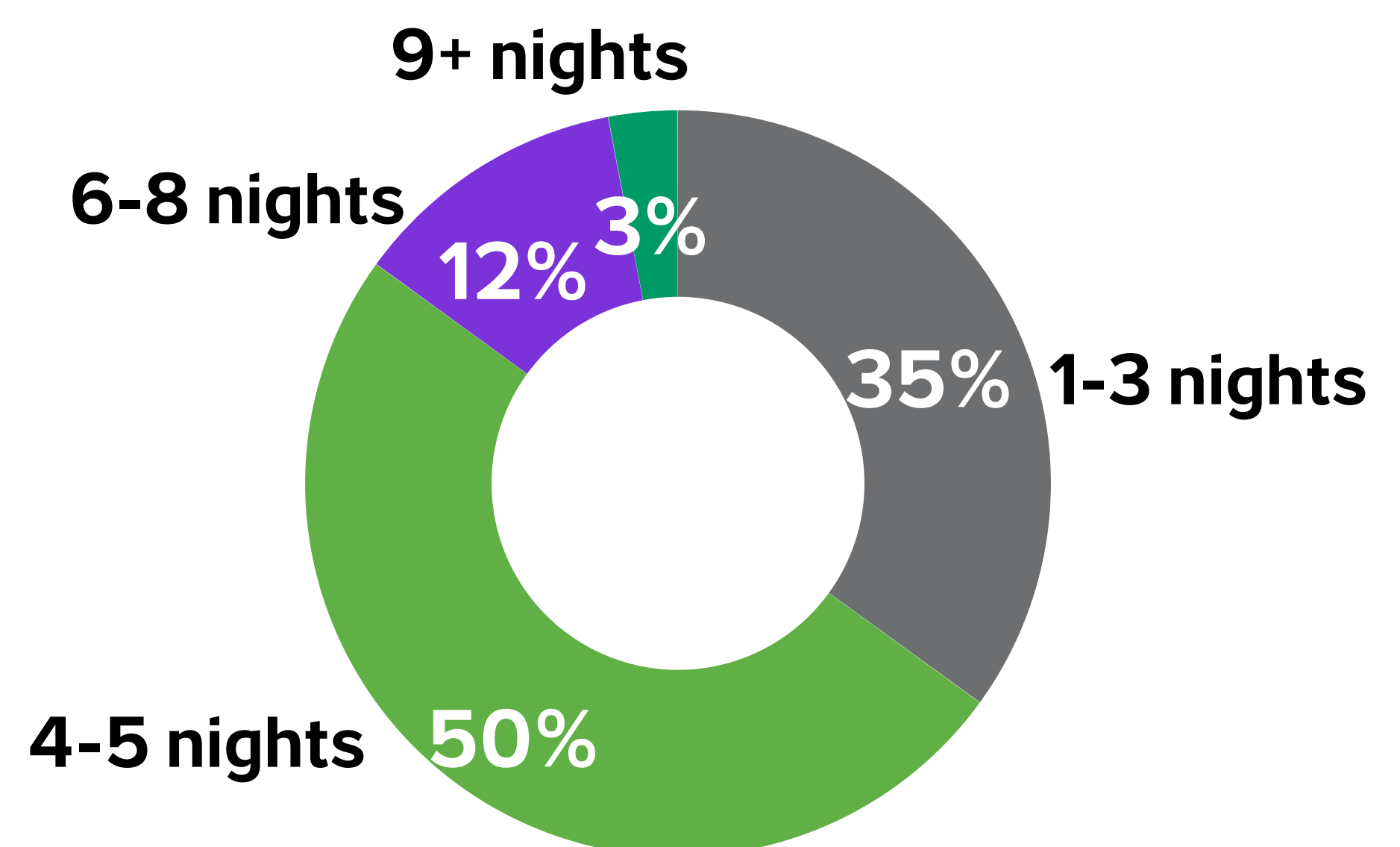
WHEN DID OUR HOLIDAYMAKERS VISIT?

Nordic holidaymakers' trips to the island of Ireland were evenly spread among the last three quarters of 2023.



HOW LONG DID OUR HOLIDAYMAKERS STAY?

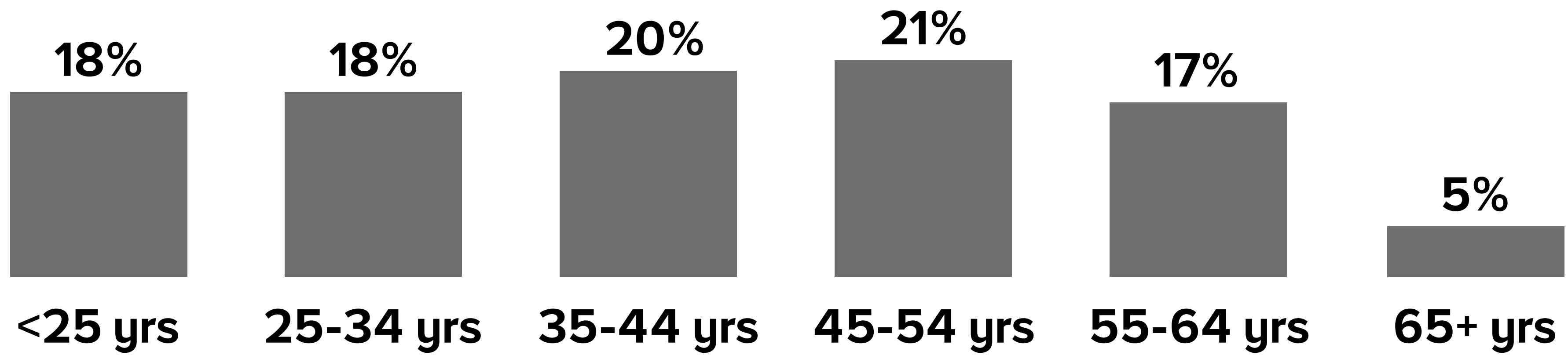
Half (50%) of Nordic holidaymakers stayed four to five nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

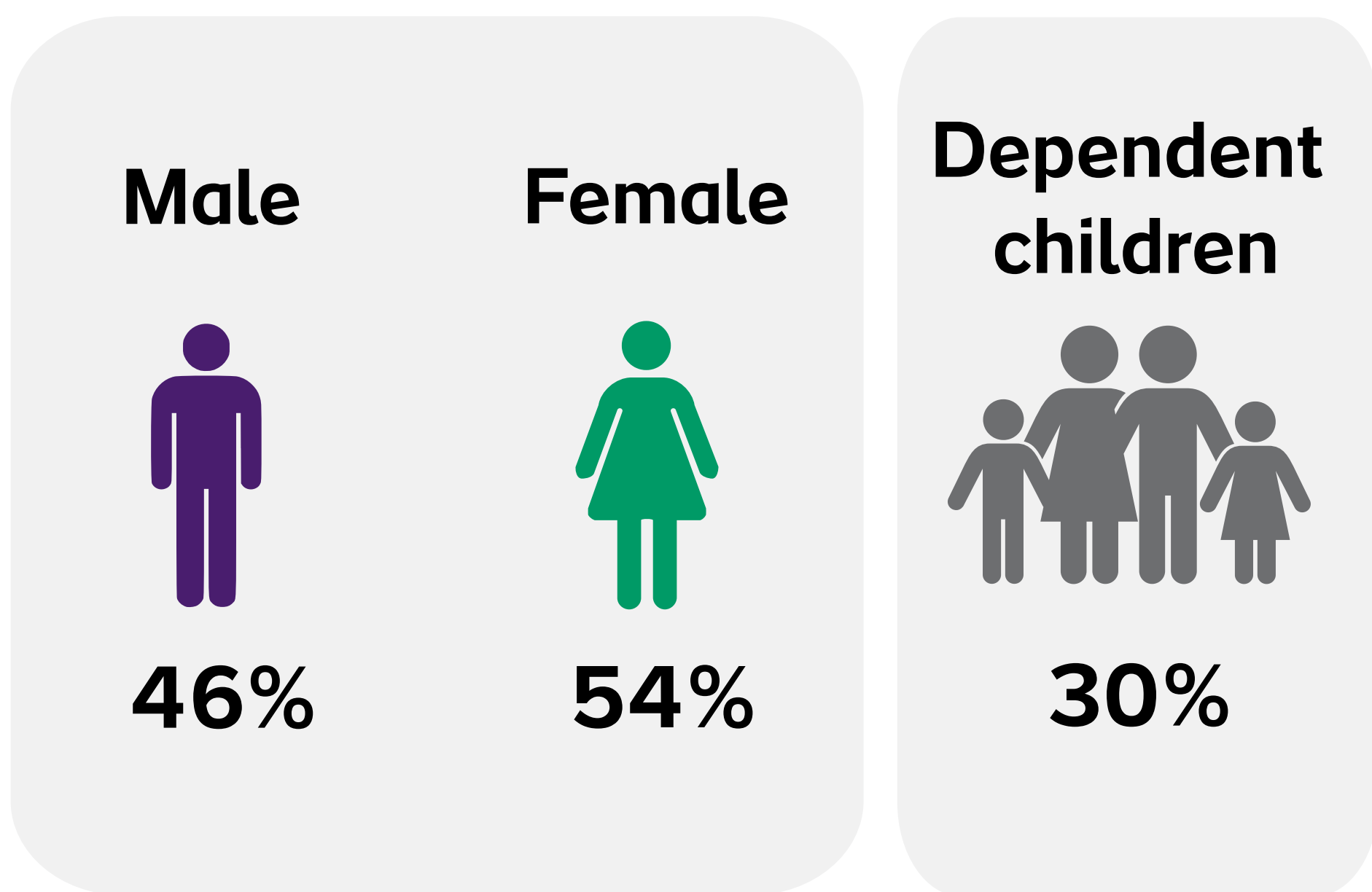
WHAT AGE WERE OUR HOLIDAYMAKERS?

Two-fifths (41%) of Nordic holidaymakers were 35 - 54 years old.



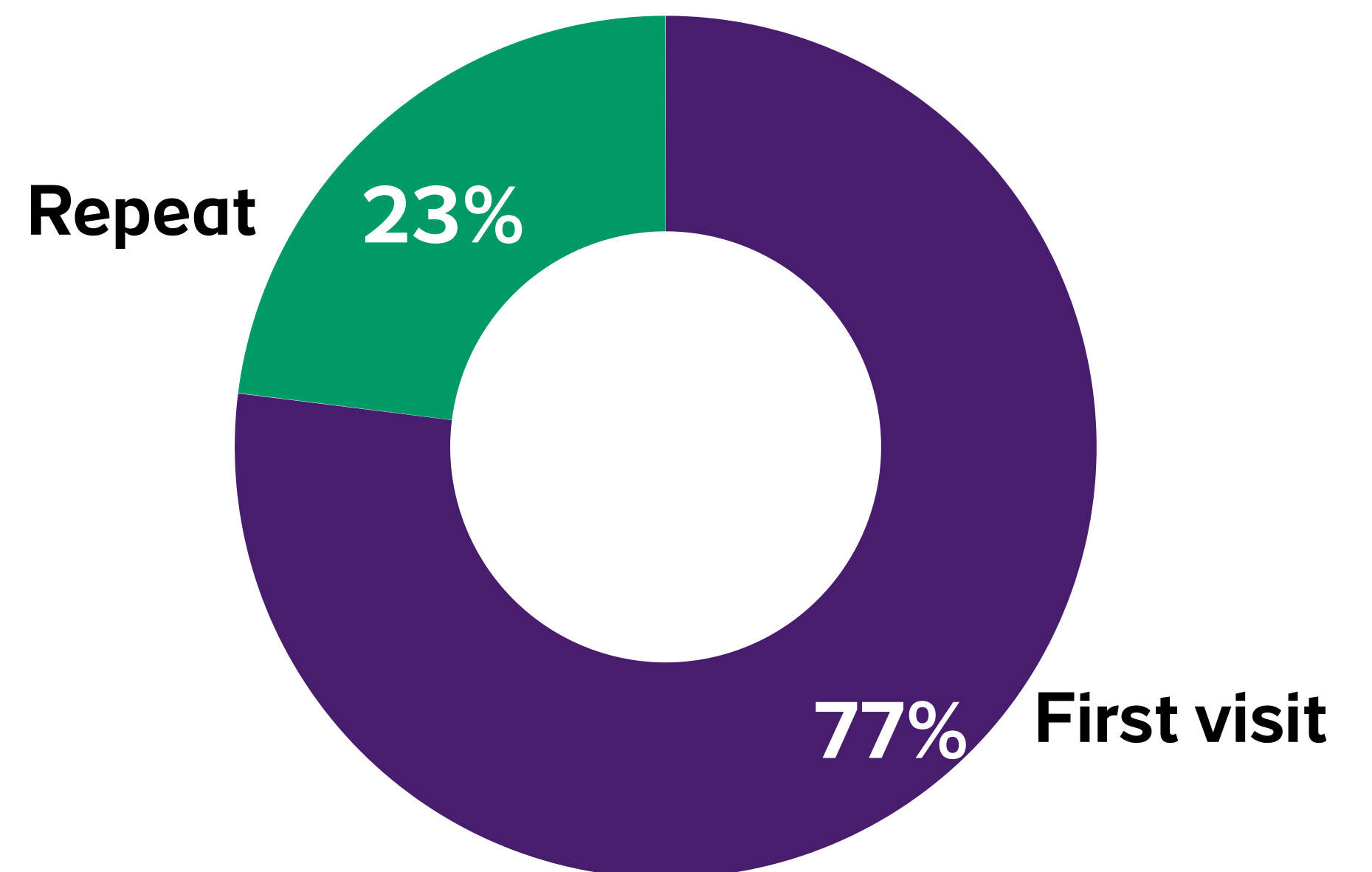
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Three-in-ten (30%) Nordic holidaymakers had dependent children in the household (whether empty nesters or pre-children).



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

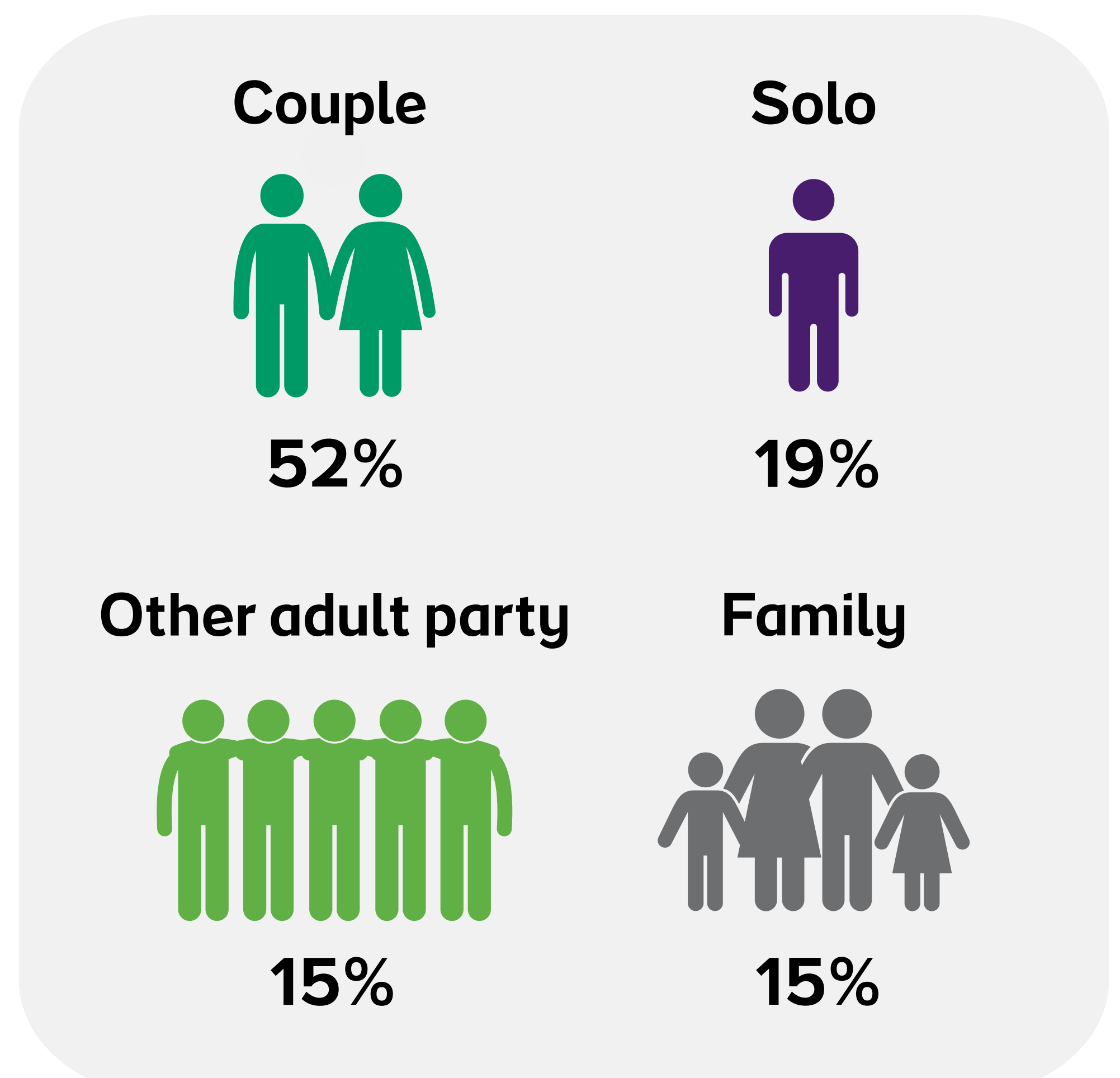
It was a first visit for over three-quarters (77%) of Nordic holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Half (52%) of Nordic holidaymakers travelled with their spouse/partner.

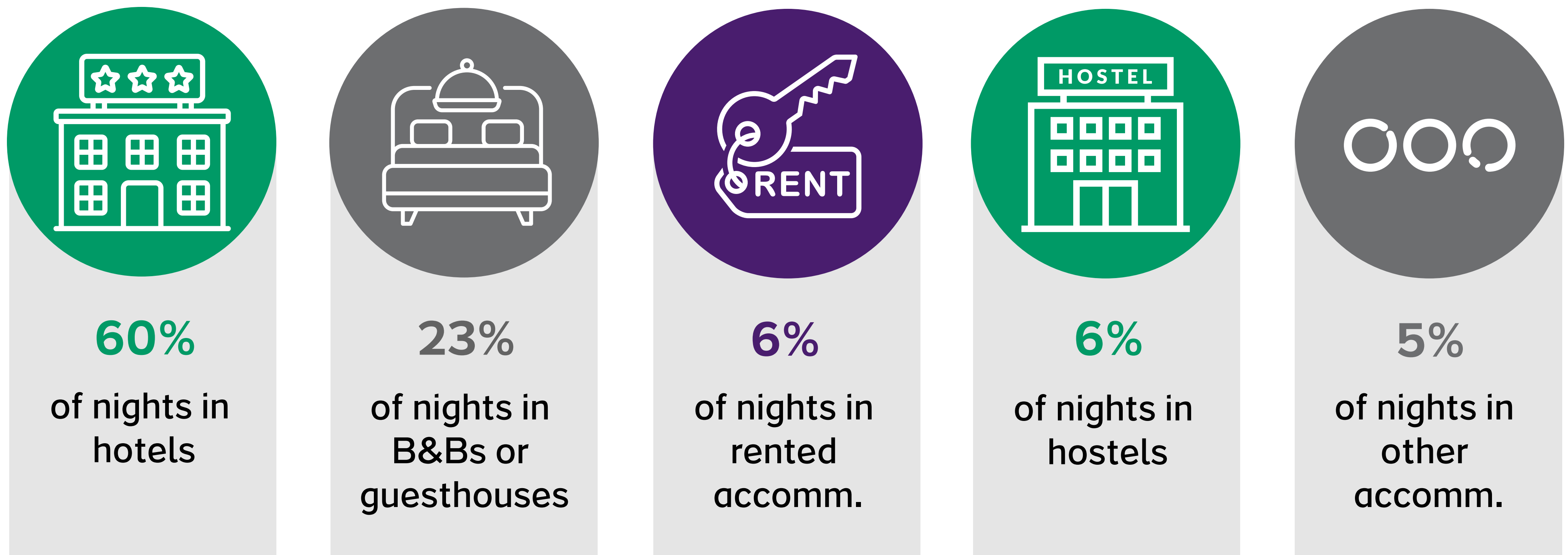
One-fifth (19%) visited on their own.



INBOUND HOLIDAYMAKERS

WHERE DID OUR HOLIDAYMAKERS STAY?

Nordic holidaymakers spent the majority (60%) of nights in hotels and around a quarter (23%) of nights were spent in B&Bs or guesthouses.



HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

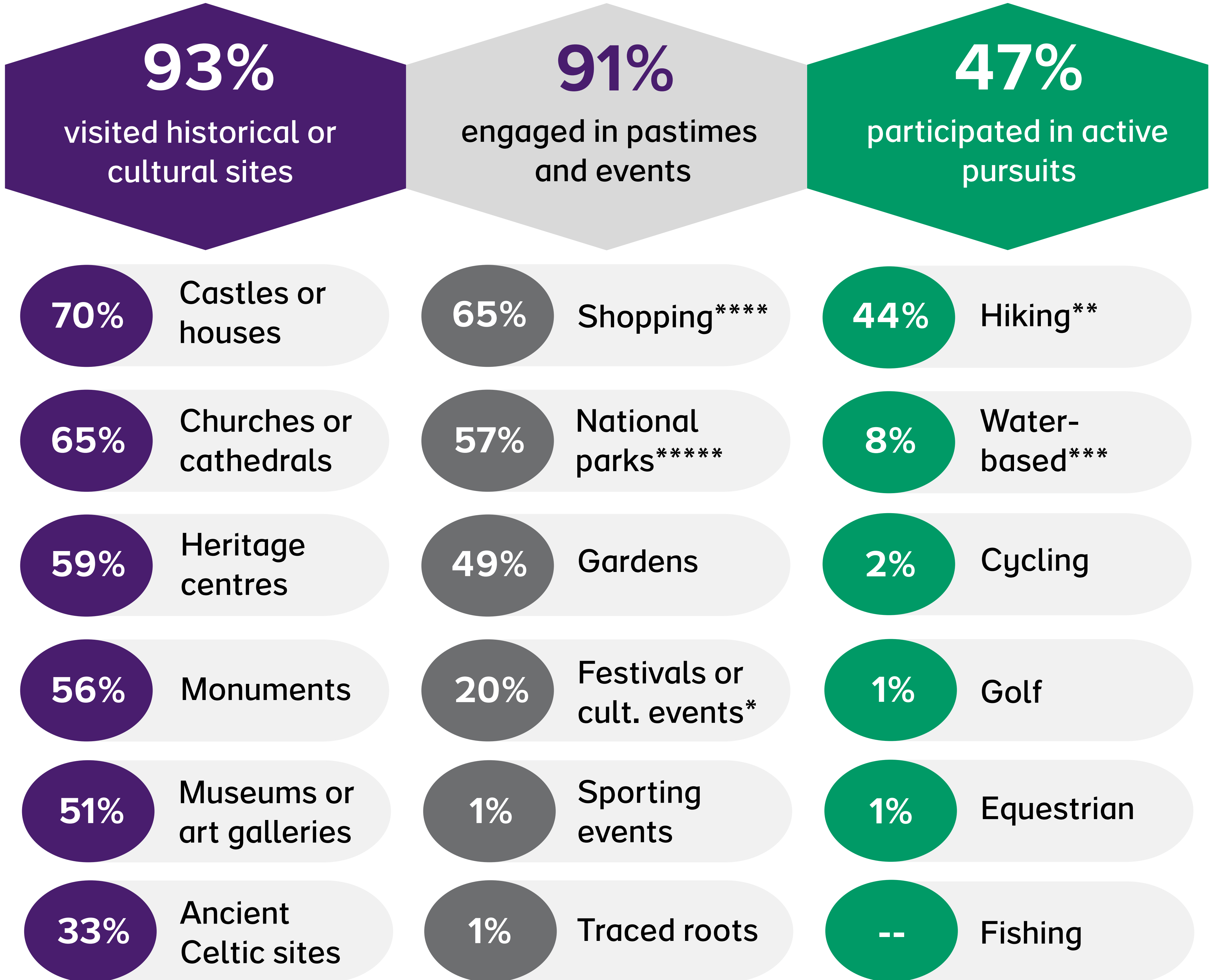
The majority (94%) of Nordic holidaymakers travelled independently and two-fifths (38%) used a car while on the island of Ireland.



INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

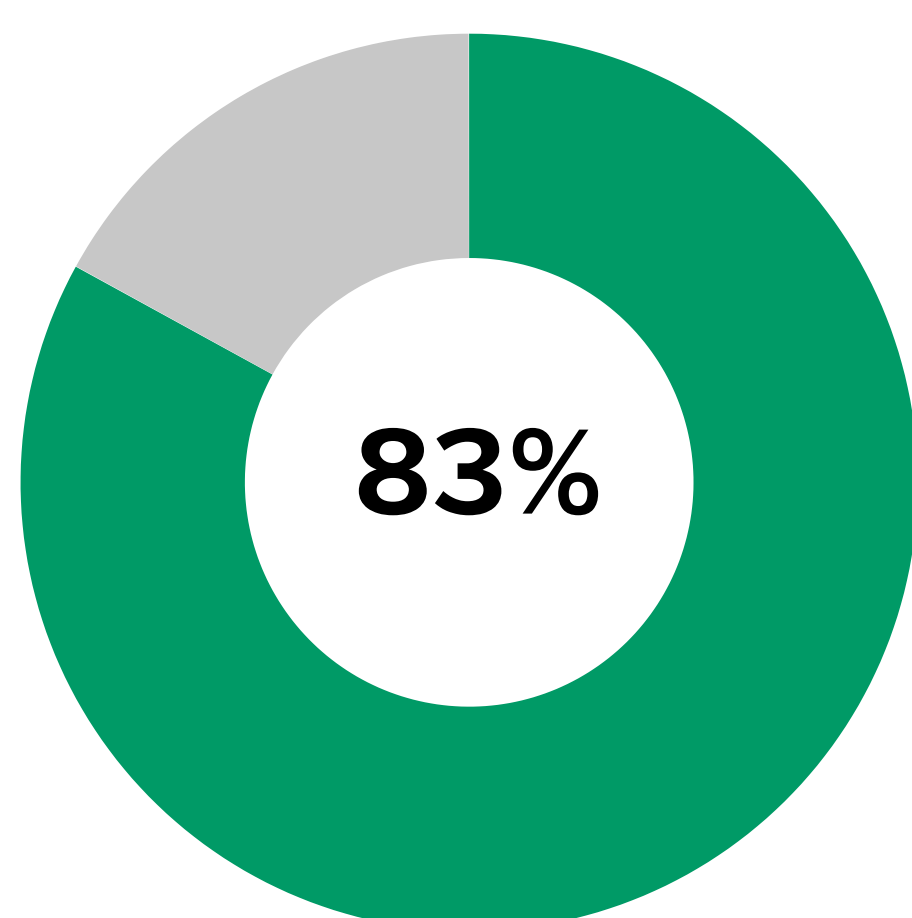
Nordic holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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

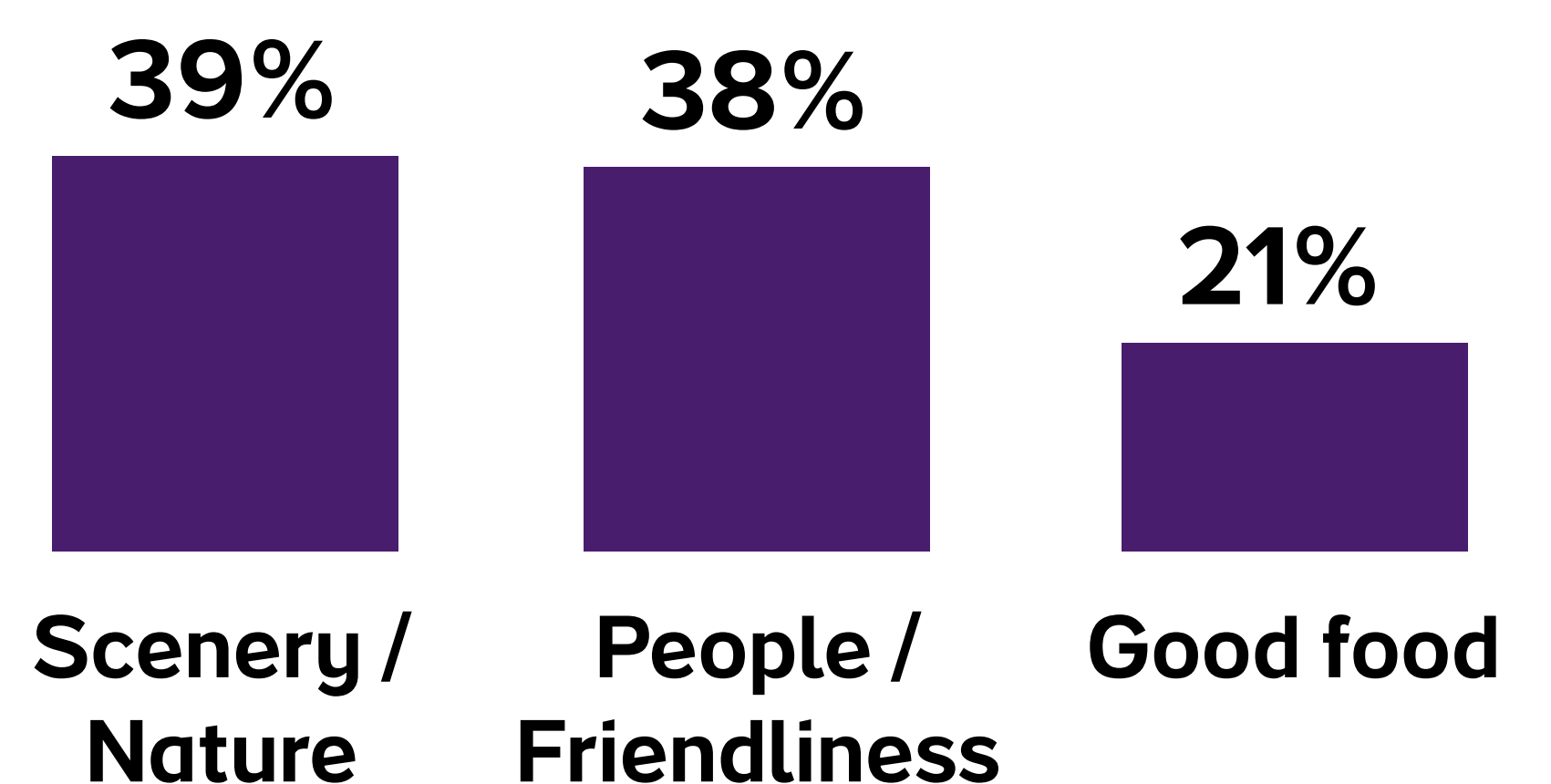
The majority (83%) of Nordic holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the scenery and nature (39%), the friendly people (38%) and good food (21%).



**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

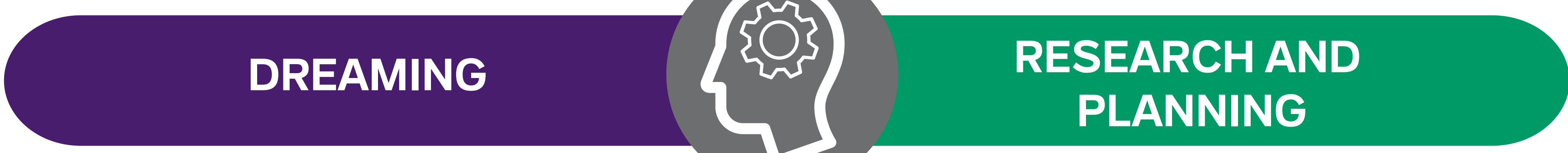
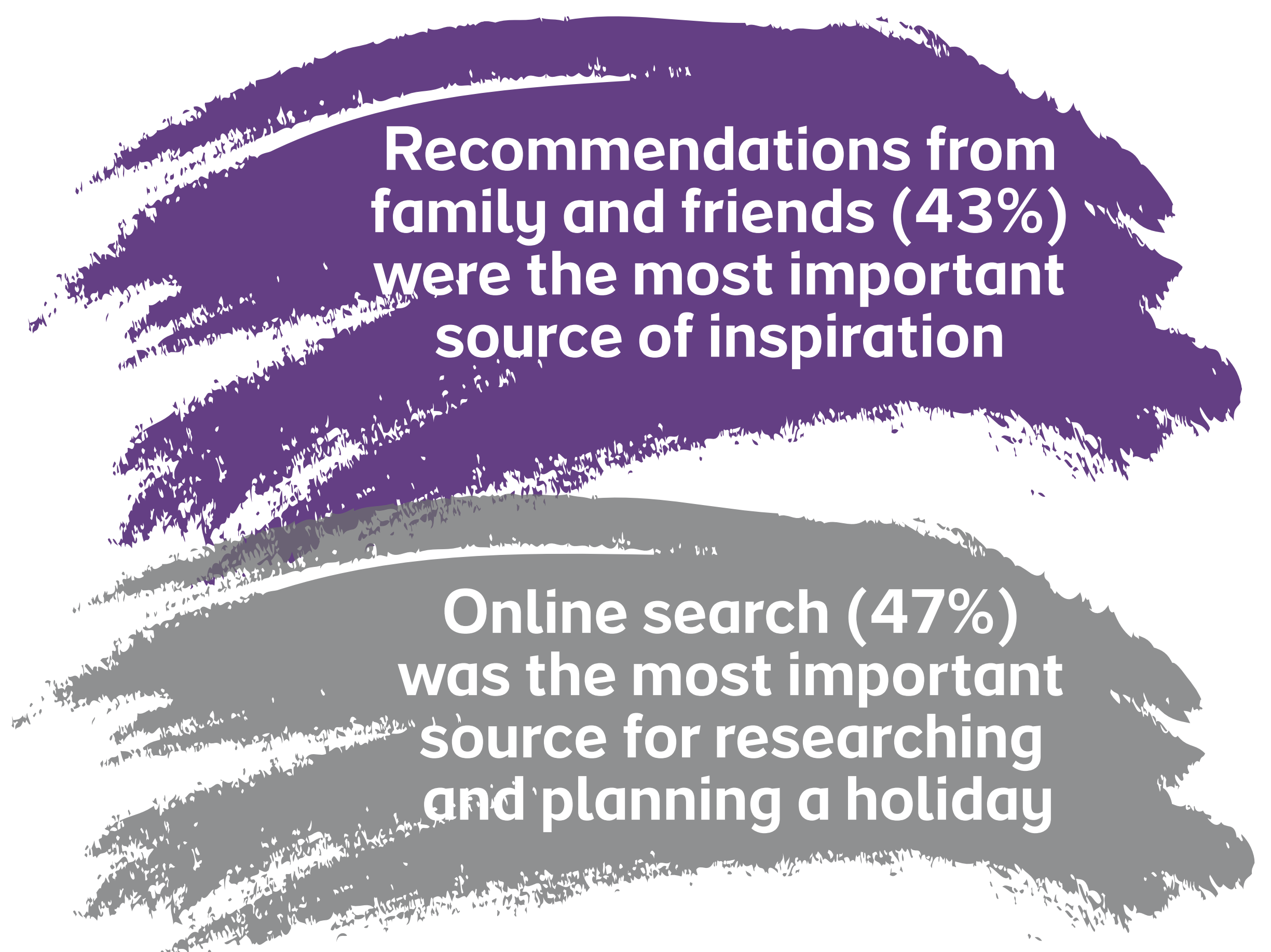






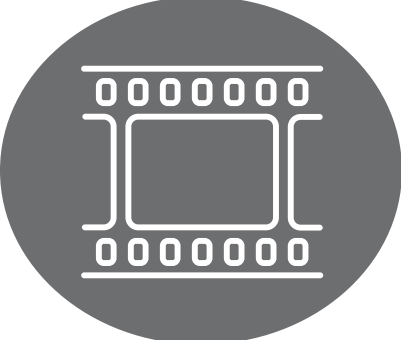


OUTBOUND HOLIDAYMAKERS





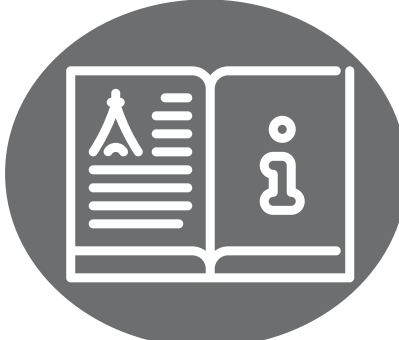


SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Mainland Europe* 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.



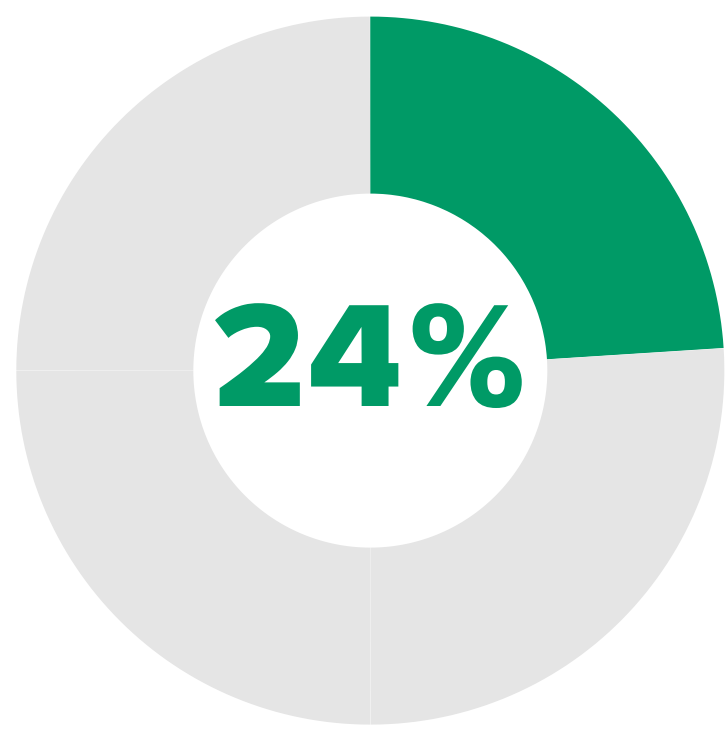
-  **43%** family and friends' recommendations
-  **38%** online search
-  **29%** travel websites**
-  **27%** travel articles e.g. magazines, websites
-  **26%** films, TV shows, travel shows
-  **20%** social media
-  **19%** travel blogs

-  **47%** online search
-  **33%** destination websites
-  **31%** travel websites**
-  **27%** family and friends' recommendations
-  **23%** guidebooks
-  **19%** online travel agencies
-  **18%** travel articles e.g. magazines, websites

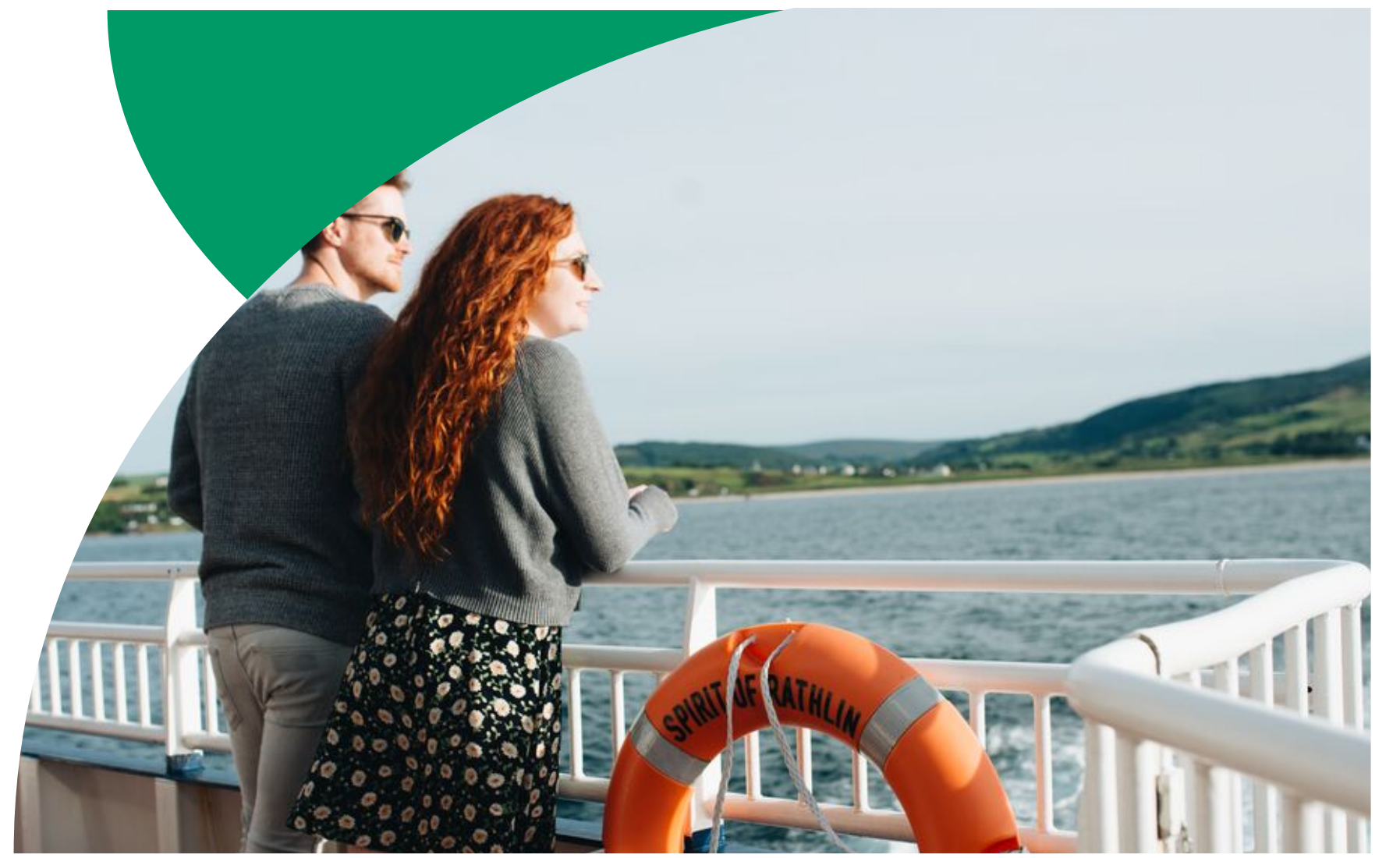
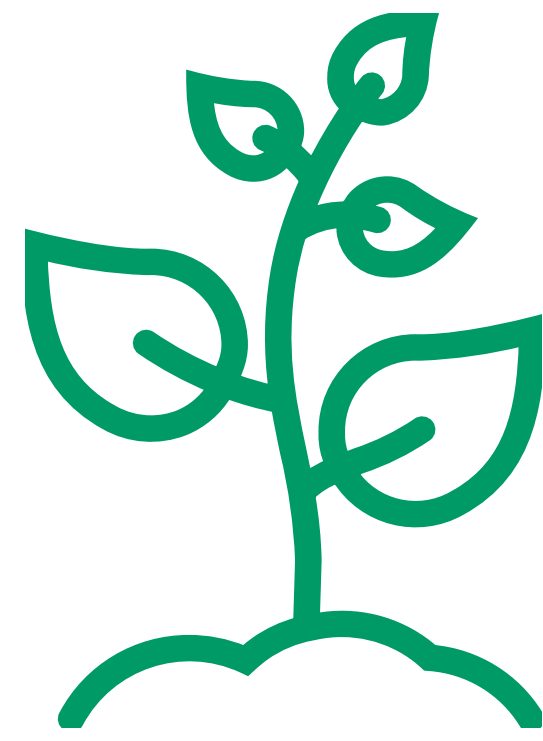
**Travel websites include company websites and booking platforms

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

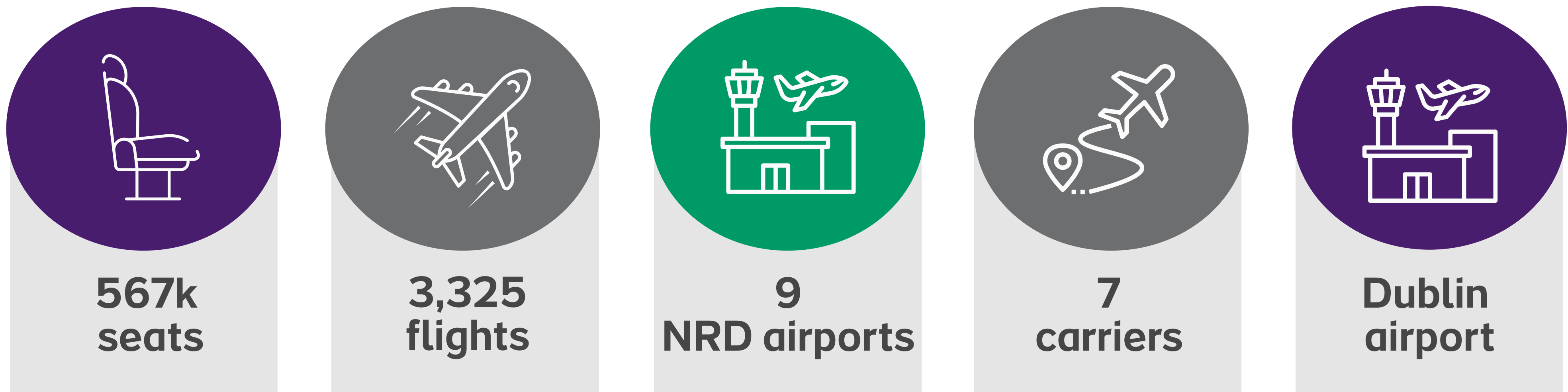
- 1  To feel connected to nature
- 2  To broaden and stimulate my mind
- 3  To feel the character of the place and people
- 4  To appreciate historical/modern architecture
- 5  To experience the vibrancy of the place and people
- 6  To experience living like a local
- 7  To enjoy authentic moments with 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

Combined, the Nordics represented the world's eighth-largest outbound market in 2023 and 90% of all outbound trips from the Nordics were to other parts of Europe.

ACCESS BY AIR

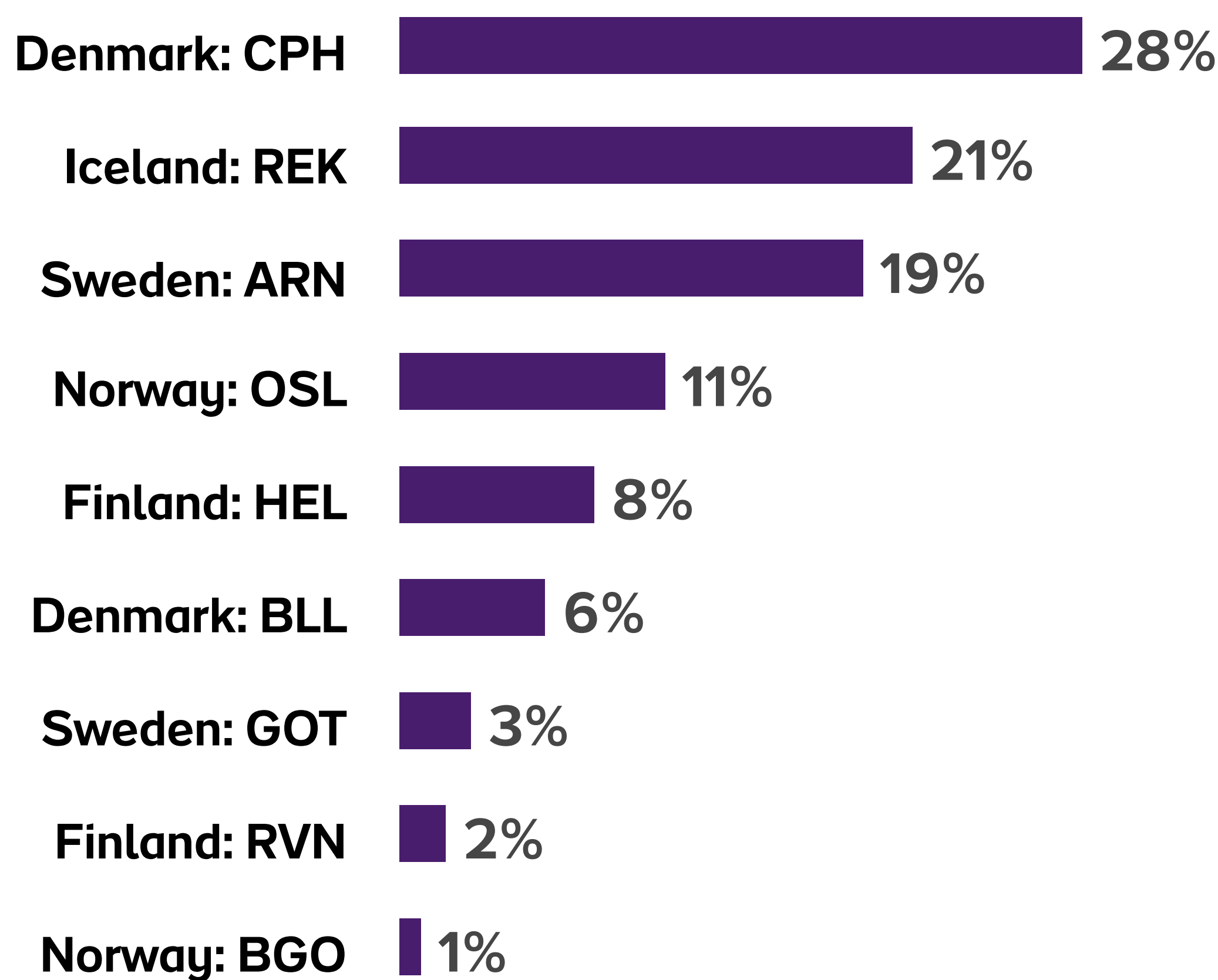
There were almost 567,000 direct one-way air seats available on over 3,000 flights from the Nordics to the island of Ireland in 2023. There were nine gateways from the Nordics to Dublin airport.



WHERE CAN OUR TOURISTS FLY FROM?

Copenhagen Kastrup (28%), Reykjavík (21%) and Stockholm (19%) accounted for the majority (67%) of seats in 2023. Denmark accounted for the largest (34%) share of seats among Nordic countries.

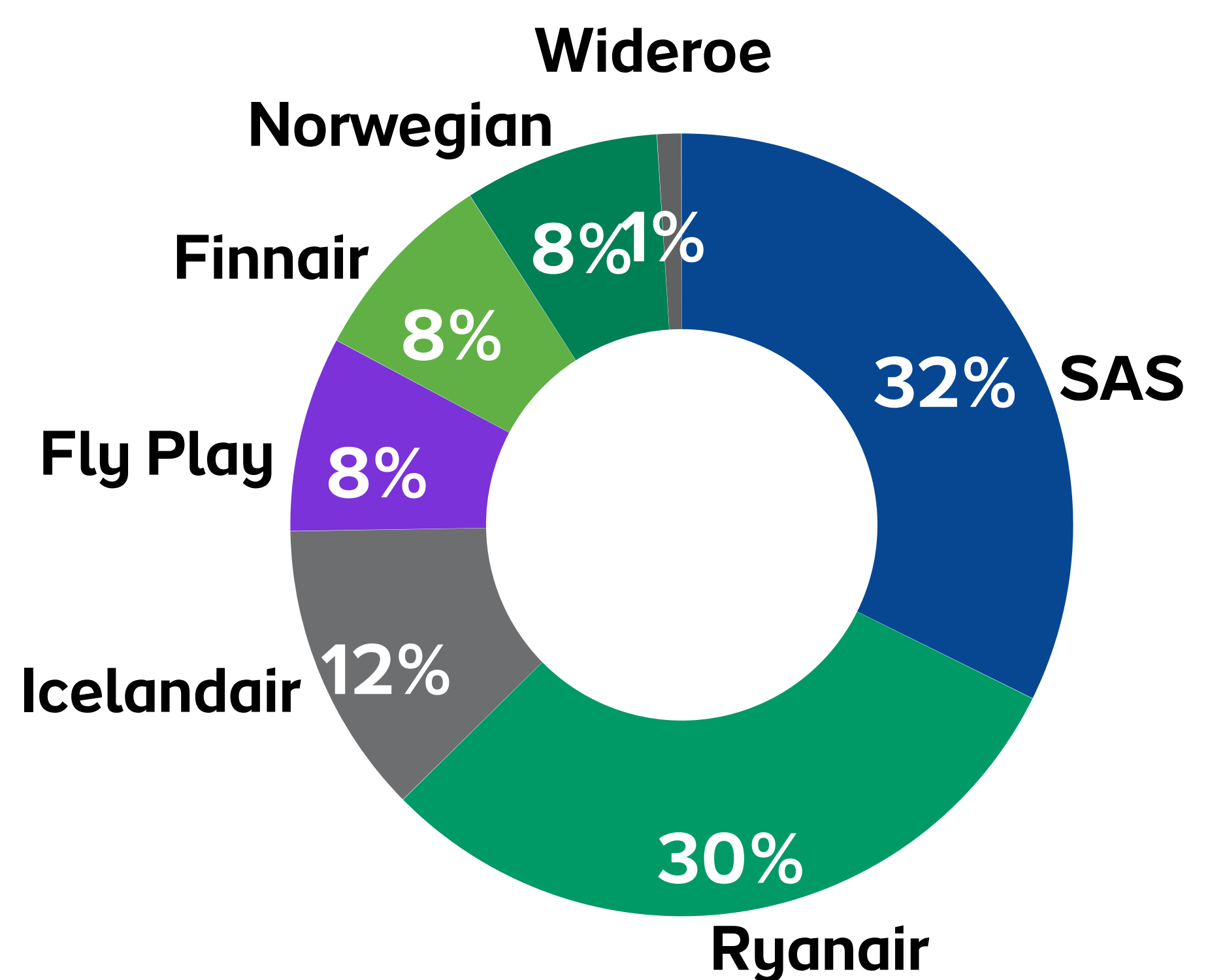
Share of seats by airport



WHO CAN OUR TOURISTS FLY WITH?

Seven carriers operated between the Nordics and the island of Ireland. In 2023, SAS and Ryanair were responsible for delivering the vast majority (62%) of seats to the island of Ireland.

Share of seats by carrier



CPH: Copenhagen Airport (DNK), RKV: Reykjavík (ISL), ARN: Stockholm Arlanda Airport (SWE), OSL: Oslo Gardermoen Airport (NOR), HEL: Helsinki Airport (FIN), BLL: Billund Airport (DNK), GOT: Gothenburg Airport (SWE), RVN: Rovaniemi Airport (FIN), BGO: Bergen Airport (NOR)