Nordics Market Profile

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Size of the Nordic market to the island of Ireland

	2005	2006	2007	2008	2009	2010e	2011e
Outbound holiday trips (000)	19,510	19,677	20,113	21,958	22,173	23,195	24,965
Total visits (000)	166	190	259	228	174	169	187
Holiday visits (000)	134	172	191	107	89	91	96
Promotable visitors (000)	152	187	210	125	89	92	110
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

Tourism Ireland
Marketing the island of Ireland overseas

Holidaymakers at a glance ...

The Nordic holidaymakers represented our largest market of short-breakers with three-quarters of these visitors staying 1-5 nights.

Hotels are very popular among these visitors, more popular than with any other market, with every second (54%) Nordic holidaymaker staying in this type of accommodation in 2011. Approximately two-thirds of Nordic holidaymakers booked their accommodation online.

Dublin was the destination of choice for most (90%) Nordic holidaymakers and the majority of these remained in this region.

Most travel independently and do not use a car during their visit (83%).

It was a first visit for three-quarters of our Nordic holidaymakers in 2011.

The Nordics provided the island of Ireland with the second largest market of C2's (13%), after Great Britain.

Nordic holidaymakers tend to be over 35 years of age and while most are categorised as Sightseers and Culture Seekers, they have the largest share of Social Adventurers and Relaxers, across all markets.

When do holidaymakers arrive?

Month Of Arrival	2005	2006	2007	2008	2009	2010	2011
January - March	***8%***	***8%***	***16%***	***12%***	***14%***	***16%***	***15%***
January	2%	1%	2%	5%	2%	5%	4%
February	0%	1%	5%	3%	4%	4%	7%
March	6%	6%	9%	4%	8%	8%	4%
April	11%	10%	9%	14%	11%	6%	8%
May	9%	16%	11%	1%	11%	16%	7%
June	9%	20%	12%	10%	8%	10%	16%
July	23%	14%	7%	20%	12%	13%	15%
August	18%	9%	18%	11%	12%	15%	10%
September	6%	7%	12%	10%	15%	8%	13%
October	9%	6%	9%	12%	7%	10%	9%
November	6%	5%	5%	8%	6%	3%	5%
December	0%	4%	1%	1%	2%	3%	1%
October - December	***15%***	***15%***	***15%***	***21%***	***16%***	***16%***	***15%***

When did holidaymakers decide to visit?**

Month Decided to visit	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		2%	2%	4%	6%	4%	7%
Oct-December (previous year)		14%	15%	21%	11%	18%	17%
January		14%	13%	9%	8%	18%	9%
February		14%	12%	4%	10%	8%	6%
March		13%	13%	8%	12%	10%	13%
April		12%	6%	12%	14%	11%	11%
May		13%	6%	6%	7%	8%	11%
June		7%	9%	10%	15%	4%	10%
July		3%	8%	11%	4%	9%	7%
August		3%	5%	9%	7%	6%	5%
September		4%	9%	5%	6%	3%	5%
October		2%	1%	0%	2%	0%	1%
November		1%	0%	0%	0%	1%	1%
December		0%	0%	0%	0%	0%	0%

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

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

Jump into Ireland

When did holidaymakers make a reservation?**

Month reserved part of trip	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		1%	1%	0%	4%	3%	1%
Oct-December (previous year)		9%	12%	17%	10%	16%	9%
January		14%	11%	10%	8%	16%	13%
February		14%	10%	5%	10%	10%	7%
March		13%	14%	13%	10%	10%	14%
April		13%	9%	12%	15%	10%	9%
May		13%	9%	6%	6%	8%	12%
June		9%	9%	11%	17%	6%	12%
July		3%	9%	11%	4%	6%	9%
August		4%	5%	9%	9%	10%	6%
September*		4%	10%	7%	5%	4%	6%
October*		2%	1%	1%	2%	0%	0%
November*		1%	0%	0%	0%	1%	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	96%	98%	99%	100%	100%	99%	97%
Sea	4%	2%	1%	0%	0%	1%	3%

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	61%	63%	62%	67%	67%	70%	74%
6-8 nights	26%	27%	23%	15%	24%	23%	17%
9-14 nights	9%	8%	12%	15%	6%	6%	6%
15+ nights	5%	1%	3%	3%	2%	2%	3%
Average number of nights	*6.1*	*5.6*	*5.6*	*5.5*	*5.0*	*5.1*	*4.9*

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2005	2006	2007	2008	2009	2010	2011
Hotels	28%	24%	51%	39%	56%	60%	54%
Guesthouses & B&B's	18%	43%	25%	31%	16%	23%	18%
Rented	20%	7%	7%	4%	7%	6%	11%
Caravan/Camping	3%	2%	3%	0%	1%	1%	2%
Friends & Relatives	26%	22%	5%	7%	8%	2%	5%
Other	5%	3%	9%	20%	12%	8%	11%

Where do holidaymakers visit on the island of Ireland?

Regions visited	2005	2006	2007	2008	2009	2010	2011
Dublin	79%	87%	88%	95%	96%	87%	90%
Midlands East	7%	14%	7%	7%	8%	9%	8%
South Eastern	6%	11%	4%	10%	6%	7%	8%
South West	15%	17%	17%	15%	16%	15%	11%
Midwest	18%	12%	7%	11%	8%	6%	6%
Western	15%	24%	16%	16%	17%	18%	14%
Northwest	5%	3%	6%	4%	5%	3%	6%
Northern Ireland	4%	4%	3%	4%	4%	10%	7%

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How many holidaymakers use a car?

Car Usage	2005	2006	2007	2008	2009	2010	2011
Car Not Used	73%	75%	87%	82%	83%	85%	83%
Car Hire	25%	23%	13%	18%	17%	15%	15%
Car Brought	2%	2%	1%	0%	0%	0%	2%

How do holidaymakers make their travel arrangements?

Travel Arrangement	2005	2006	2007	2008	2009	2010	2011
Package	25%	17%	16%	14%	22%	28%	17%
Independent	75%	83%	84%	86%	78%	72%	83%

Use of internet to book part of trip**

	2005	2006	2007	2008	2009	2010	2011
Yes		75%	79%	90%	86%	81%	90%
No		25%	21%	10%	14%	19%	10%

Items booked online**

	2005	2006	2007	2008	2009	2010	2011
Air-Sea tickets		74%	72%	85%	81%	79%	83%
Accommodation		36%	60%	73%	63%	69%	70%
Car hire		8%	10%	13%	16%	10%	9%
Other		0%	3%	5%	0%	1%	1%

Sites visited if using the internet**

	2005	2006	2007	2008	2009	2010	2011
Travel Agent's website		3%	6%	4%	6%	6%	10%
Specific accommodation provider's website		12%	15%	19%	28%	16%	14%
Specific Air/Sea Carrier's website		57%	49%	55%	63%	62%	52%
General holiday search portal		16%	18%	30%	18%	16%	29%
Tourist Board's website		18%	15%	11%	13%	11%	16%
Other site with general info on Irish holidays		9%	7%	7%	8%	6%	7%
User Generated Sites e.g. Blogs / Trip Advisor		n/a	0%	1%	1%	1%	4%
Car Hire Website		n/a	2%	2%	11%	4%	5%
Social Networking Sites e.g. Facebook		n/a	n/a	n/a	n/a	n/a	1%
Other		1%	8%	4%	0%	1%	2%

Have holidaymakers been to the island of Ireland before?

Familiarity	2005	2006	2007	2008	2009	2010	2011
First visit	78%	76%	71%	73%	76%	78%	74%
Repeat visit	21%	24%	28%	26%	24%	22%	26%
Born on the island of Ireland	1%	0%	1%	1%	0%	0%	0%

What is the social class profile of holidaymakers?

Social Class	2005	2006	2007	2008	2009	2010	2011
AB	26%	19%	25%	16%	19%	20%	25%
C1	61%	65%	63%	66%	62%	62%	57%
C2	10%	10%	8%	12%	17%	14%	13%
DEF	2%	6%	4%	5%	2%	4%	6%

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What age are holidaymakers?

Age	2005	2006	2007	2008	2009	2010	2011
Under 16	2%	4%	3%	2%	6%	3%	5%
16-24	15%	11%	10%	15%	16%	13%	14%
25-34	16%	26%	12%	26%	18%	19%	18%
35-44	26%	17%	29%	15%	15%	17%	22%
45-54	17%	23%	24%	17%	24%	18%	19%
55+	23%	19%	23%	25%	21%	30%	23%

Who do holidaymakers travel with?

Party Composition	2005	2006	2007	2008	2009	2010	2011
Alone	19%	24%	19%	26%	15%	14%	19%
Couple	44%	44%	43%	42%	39%	35%	40%
With family	14%	14%	11%	15%	17%	15%	20%
Other Adult Party	23%	18%	27%	17%	29%	36%	21%

Segments

Best Description of Holiday Needs	2005	2006	2007	2008	2009	2010	2011
S&CS's	64%	80%	77%	77%	75%	78%	71%
Outdoor Actives	6%	2%	5%	3%	3%	1%	2%
Family & Loved Ones	3%	7%	3%	4%	0%	3%	2%
Affinity Groups	4%	0%	0%	2%	6%	3%	2%
Luxury Lovers	0%	0%	0%	0%	0%	1%	0%
Relaxers	19%	10%	11%	11%	12%	12%	12%
Social Adventurers	3%	2%	3%	3%	3%	2%	11%

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

	2005	2006	2007	2008	2009	2010	2011
Any Of The Below		77%	81%	65%	79%	80%	89%
Historic Houses/Castles		60%	51%	48%	65%	64%	73%
Monuments		51%	45%	44%	57%	57%	60%
Heritage/Interpretative Centres		41%	36%	42%	47%	47%	54%
Museums/Art Galleries		44%	52%	42%	40%	54%	58%
Other Sites Of Cultural Historical Interest		12%	23%	17%	15%	10%	22%
None Of These		23%	19%	35%	21%	20%	11%

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

	2005	2006	2007	2008	2009	2010	2011
Visited Gardens		17%	15%	11%	27%	31%	38%
Visited National Parks/Forests		n/a	n/a	n/a	24%	37%	39%
Attended An Organised Sporting Event		1%	4%	1%	2%	3%	3%
Tracing Roots/Geneology		1%	1%	1%	0%	0%	1%
Attended Cultural Event/Festival		6%	9%	3%	6%	9%	14%
Used Spa Facilities		0%	1%	0%	1%	1%	2%
None Of These		n/a	n/a	85%	60%	50%	41%

What activities do our holidaymakers engage in?**

	2005	2006	2007	2008	2009	2010	2011
Fishing		1%	1%	0%	0%	0%	0%
Equestrian Pursuits		2%	1%	0%	1%	0%	1%
Cycling		1%	3%	2%	1%	2%	0%
Golf		4%	2%	2%	3%	2%	3%
Hiking/Cross-Country Walking		5%	6%	4%	8%	12%	12%
Other Water Based Activities		1%	1%	1%	0%	0%	0%

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

Regionality Segments	2005	2006	2007	2008	2009	2010	2011
Dublin Only		53%	66%	67%	70%	62%	69%
Tourer		21%	16%	19%	21%	14%	13%
Static Regional		8%	8%	4%	2%	5%	6%
Two Bases		18%	10%	10%	7%	18%	13%

Where do our holidaymakers come from?**

	2005	2006	2007	2008	2009	2010	2011
Norway	16%	18%	29%	26%	31%	35%	39%
Sweden	36%	42%	33%	35%	32%	30%	38%
Denmark	21%	24%	22%	19%	26%	25%	16%
Finland/Iceland	27%	16%	16%	19%	12%	9%	7%

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.

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Ireland's Image

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

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

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