Canada Market Profile

For general Trade enquiries contact:
Helen Cole (Trade & Online Promotions Executive), Tel: +1 4169256368, hcole@tourismireland.com

Size of the Canada market to the island of Ireland

	2005	2006	2007	2008	2009	2010e	2011e
Outbound holiday trips (000)	18,238	19,684	21,886	23,864	23,437	25,687	27,315
Non-US Outbound holiday trips (000)	5,582	6,032	6,633	7,309	7,517	7,995	8,356
Total visits (000)	102	100	103	108	98	98	114
Holiday visits (000)	53	53	43	52	58	50	61
Promotable visitors (000)	55	56	46	55	62	51	70

All Euro (€) / Sterling (£) conversions have been carried out at a rate of €1 = £0.86798
(Revenue does not include carrier receipts or international air and sea fares)
Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)

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

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Holidaymakers at a glance ...

Four-in-five Canadian holidaymakers visited between May and September in 2011.

The most popular length of stay for Canadian holidaymakers is 9-14 nights (42%), though more than one-third (37%) do a short-break of 1-5 night as part of a larger European tour.

Hotels are by far the most preferred accommodation type (44%) though Guesthouses & B&B's are also popular (26%) among Canadian visitors.

Dublin, the South-West and West are the most popular regions visited by Canadian tourists. Canadian tourists tend to tour around and are the most likely group of holidaymakers to have two bases during the course of their vacation.

Just over one-quarter (27%) of Canadian holidaymakers hired a car during their trip on the island of Ireland.

One-third (34%) of Canadian holidaymakers travelled on a package holiday in 2011, more than from any other market.

Two-fifths of Canadian holidaymakers booked some part of the trip online (41%), less than any other market. However, this is a pattern observed with other long haul markets.

A large portion of Canadian holidaymakers (76%) in 2011 were experiencing the island of Ireland for the first time.

Canada provides the island of Ireland with its highest proportion (92%) of ABC1's.

When do holidaymakers arrive?

Month Of Arrival	2005	2006	2007	2008	2009	2010	2011
January - March	***5%***	***3%***	***7%***	***2%***	***9%***	***4%***	***8%***
January	2%	2%	1%	1%	6%	1%	0%
February	0%	0%	1%	1%	2%	1%	5%
March	4%	1%	5%	0%	2%	3%	3%
April	1%	5%	3%	9%	3%	4%	5%
May	25%	16%	25%	14%	12%	19%	18%
June	12%	13%	19%	20%	14%	22%	20%
July	15%	20%	10%	13%	10%	11%	3%
August	17%	21%	12%	17%	25%	9%	17%
September	15%	15%	17%	19%	17%	21%	20%
October	5%	3%	3%	3%	3%	6%	6%
November	5%	2%	2%	0%	3%	2%	2%
December	0%	1%	1%	4%	2%	1%	0%
October - December	***10%***	***6%***	***7%***	***7%***	***9%***	***9%***	***9%***

When did holidaymakers decide to visit?**

Month Decided to visit	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		2%	6%	3%	14%	14%	15%
Oct-December (previous year)		17%	25%	16%	21%	12%	6%
January		17%	6%	6%	8%	15%	7%
February		11%	6%	17%	5%	12%	9%
March		16%	18%	9%	11%	5%	14%
April		13%	22%	15%	10%	16%	11%
May		4%	6%	8%	10%	4%	14%
June		8%	8%	5%	7%	4%	5%
July		5%	1%	12%	5%	9%	5%
August		5%	1%	3%	7%	5%	10%
September		1%	1%	1%	0%	2%	4%
October		0%	0%	0%	1%	0%	0%
November		1%	1%	4%	0%	1%	0%
December		0%	0%	0%	0%	0%	0%

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

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When did holidaymakers make a reservation?**

Month reserved part of trip	2005	2006	2007	2008	2009	2010	2011
Pre-September (previous year)		0%	0%	0%	4%	0%	5%
Oct-December (previous year)		13%	21%	13%	16%	13%	1%
January		16%	7%	5%	5%	5%	8%
February		3%	10%	15%	10%	13%	15%
March		14%	9%	7%	9%	21%	14%
April		19%	15%	16%	13%	19%	10%
May		11%	3%	8%	12%	4%	9%
June		7%	27%	10%	12%	5%	16%
July		8%	4%	14%	8%	10%	5%
August		5%	1%	7%	7%	5%	11%
September*		2%	1%	1%	3%	3%	4%
October*		0%	0%	0%	1%	0%	0%
November*		1%	1%	4%	0%	1%	0%
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	88%	88%	93%	87%	85%	92%	95%
Sea	12%	12%	7%	13%	15%	8%	5%

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	27%	15%	26%	37%	26%	28%	37%
6-8 nights	21%	32%	33%	30%	33%	26%	17%
9-14 nights	32%	43%	25%	22%	26%	35%	42%
15+ nights	20%	10%	17%	11%	14%	11%	3%
Average number of nights	*13.7*	*9.0*	*10.8*	*8.8*	*9.2*	*10.8*	*8.1*

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2005	2006	2007	2008	2009	2010	2011
Hotels	28%	24%	58%	33%	24%	35%	44%
Guesthouses & B&B's	18%	43%	15%	22%	20%	16%	26%
Rented	20%	7%	17%	6%	12%	31%	7%
Caravan/Camping	3%	2%	2%	1%	2%	1%	0%
Friends & Relatives	26%	22%	4%	12%	17%	5%	2%
Other	5%	3%	6%	26%	24%	11%	21%

Where do holidaymakers visit on the island of Ireland?

Regions visited	2005	2006	2007	2008	2009	2010	2011
Dublin	79%	75%	84%	75%	74%	71%	86%
Midlands East	24%	12%	20%	10%	7%	13%	11%
South Eastern	36%	36%	47%	37%	21%	29%	18%
South West	57%	66%	39%	56%	35%	49%	53%
Midwest	43%	37%	10%	30%	28%	40%	23%
Western	32%	51%	34%	33%	28%	40%	32%
Northwest	14%	15%	5%	9%	10%	12%	14%
Northern Ireland	36%	30%	47%	22%	27%	36%	25%

How many holidaymakers use a car?

Car Usage	2005	2006	2007	2008	2009	2010	2011
Car Not Used	52%	56%	58%	63%	67%	54%	70%
Car Hire	42%	41%	38%	36%	32%	44%	27%
Car Brought	5%	4%	4%	1%	1%	2%	3%

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How do holidaymakers make their travel arrangements?

Travel Arrangement	2005	2006	2007	2008	2009	2010	2011
Package	27%	22%	23%	22%	21%	34%	34%
Independent	73%	78%	77%	78%	79%	66%	66%

Use of internet to book part of trip**

	2005	2006	2007	2008	2009	2010	2011
Yes		49%	71%	87%	73%	61%	59%
No		51%	29%	13%	27%	39%	41%

Items booked online**

	2005	2006	2007	2008	2009	2010	2011
Air-Sea tickets		42%	60%	79%	58%	55%	44%
Accommodation		25%	43%	68%	58%	47%	44%
Car hire		12%	22%	22%	12%	17%	11%
Other		3%	2%	0%	2%	8%	0%

Sites visited if using the internet**

	2005	2006	2007	2008	2009	2010	2011
Travel Agent's website		14%	1%	9%	8%	2%	9%
Specific accommodation provider's website		11%	13%	16%	18%	9%	12%
Specific Air/Sea Carrier's website		26%	29%	36%	48%	34%	23%
General holiday search portal		15%	21%	26%	11%	13%	15%
Tourist Board's website		23%	8%	16%	14%	8%	21%
Other site with general info on Irish holidays		1%	2%	0%	5%	2%	1%
User Generated Sites e.g. Blogs / Trip Advisor		n/a	1%	1%	6%	1%	2%
Car Hire Website		n/a	12%	10%	1%	3%	6%
Social Networking Sites e.g. Facebook		n/a	n/a	n/a	n/a	n/a	5%
Other		2%	3%	4%	3%	2%	0%

Have holidaymakers been to the island of Ireland before?

Familiarity	2005	2006	2007	2008	2009	2010	2011
First visit	84%	79%	85%	81%	82%	71%	76%
Repeat visit	15%	20%	14%	18%	16%	27%	21%
Born on the island of Ireland	1%	1%	2%	1%	2%	2%	3%

What is the social class profile of holidaymakers?

Social Class	2005	2006	2007	2008	2009	2010	2011
AB	21%	34%	22%	9%	18%	25%	35%
C1	59%	56%	62%	76%	74%	54%	57%
C2	14%	6%	10%	15%	6%	17%	4%
DEF	7%	3%	6%	1%	2%	4%	3%

What age are holidaymakers?

Age	2005	2006	2007	2008	2009	2010	2011
Under 16	2%	0%	1%	6%	4%	6%	1%
16-24	16%	10%	18%	25%	22%	11%	19%
25-34	12%	10%	16%	20%	20%	8%	26%
35-44	11%	8%	4%	11%	8%	11%	9%
45-54	21%	25%	18%	22%	18%	26%	6%
55+	39%	47%	43%	16%	28%	38%	39%

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Jump into Ireland

Who do holidaymakers travel with?

Party Composition	2005	2006	2007	2008	2009	2010	2011
Alone	32%	26%	30%	16%	25%	18%	27%
Couple	37%	34%	35%	35%	37%	49%	26%
With family	12%	21%	14%	21%	18%	15%	16%
Other Adult Party	19%	19%	21%	28%	20%	18%	31%

Segments

Best Description of Holiday Needs	2005	2006	2007	2008	2009	2010	2011
S&CS's	82%	79%	79%	90%	85%	71%	74%
Outdoor Actives	1%	0%	4%	0%	2%	6%	6%
Family & Loved Ones	7%	5%	7%	1%	2%	4%	5%
Affinity Groups	4%	5%	1%	0%	4%	4%	5%
Luxury Lovers	0%	0%	0%	0%	0%	0%	0%
Relaxers	4%	10%	9%	9%	4%	12%	5%
Social Adventurers	2%	0%	0%	0%	3%	3%	7%

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

	2005	2006	2007	2008	2009	2010	2011
Any Of The Below		95%	94%	95%	94%	87%	82%
Historic Houses/Castles		91%	89%	86%	87%	82%	74%
Monuments		81%	73%	79%	74%	72%	63%
Heritage/Interpretative Centres		51%	54%	63%	62%	70%	56%
Museums/Art Galleries		51%	47%	46%	58%	58%	56%
Other Sites Of Cultural Historical Interest		5%	17%	15%	12%	3%	12%
None Of These		5%	6%	5%	6%	13%	18%

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

	2005	2006	2007	2008	2009	2010	2011
Visited Gardens		22%	35%	33%	42%	35%	37%
Visited National Parks/Forests		n/a	n/a	n/a	42%	44%	36%
Attended An Organised Sporting Event		5%	9%	0%	4%	4%	1%
Tracing Roots/Geneology		6%	2%	0%	5%	11%	1%
Attended Cultural Event/Festival		5%	16%	11%	8%	11%	6%
Used Spa Facilities		3%	1%	0%	0%	0%	3%
None Of These		n/a	n/a	63%	41%	38%	46%

What activities do our holidaymakers engage in?**

	2005	2006	2007	2008	2009	2010	2011
Fishing		0%	1%	0%	1%	2%	0%
Equestrian Pursuits		0%	1%	0%	1%	0%	0%
Cycling		6%	4%	4%	3%	2%	0%
Golf		5%	3%	1%	4%	14%	5%
Hiking/Cross-Country Walking		21%	10%	9%	23%	25%	12%
Other Water Based Activities		0%	1%	0%	1%	6%	2%

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

Regionality Segments	2005	2006	2007	2008	2009	2010	2011
Dublin Only		14%	14%	21%	28%	15%	32%
Tourer		63%	48%	55%	42%	57%	46%
Static Regional		9%	13%	13%	10%	16%	0%
Two Bases		12%	25%	11%	19%	8%	22%

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What other countries do holidaymakers visit as part of their trip to the Republic of Ireland?**

Regions visited	2005	2006	2007	2008	2009	2010	2011
NI			5%	2%	14%	8%	8%
England/Isle of Man/Channel islands			22%	42%	33%	27%	29%
Scotland			9%	12%	8%	19%	10%
Wales			0%	0%	2%	5%	9%
France			13%	13%	20%	11%	18%
Germany			6%	9%	11%	5%	8%
Italy			5%	14%	15%	2%	0%
Benelux			19%	6%	15%	4%	3%
Scandinavia			0%	5%	5%	2%	1%
Other European			4%	8%	16%	9%	6%
Elsewhere			1%	0%	4%	1%	5%

Where do our holidaymakers come from?**

	2005	2006	2007	2008	2009	2010	2011
Quebec (Montreal, Quebec)	7%	11%	10%	1%	4%	4%	23%
Newbrunswick(St.John)	6%	0%	0%	4%	0%	0%	0%
Nova Scotia(Halifax)	1%	6%	0%	0%	1%	5%	4%
Newfoundland/Labrador(St.John)	0%	0%	10%	9%	3%	4%	0%
Ontario(Toronto, Ottawa)	50%	52%	19%	40%	66%	69%	40%
Manitoba(Winnipeg)	3%	2%	0%	2%	6%	0%	2%
Saskatchewan(Regina, Prince Albert)	1%	5%	1%	8%	0%	1%	0%
Alberta (Calgary, Edmonton)	10%	8%	29%	22%	12%	9%	10%
British Columbia(Vancouver)	23%	14%	31%	14%	7%	9%	19%
North West Territories (Yellow Knife)	n/a	n/a	n/a	n/a	n/a	n/a	3%

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.

Ireland's Image

What are the top things Canadians hope to see, do or experience in Ireland?

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

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