Canada Market Profile

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Size of the Canada market to the island of Ireland

	2006	2007	2008	2009	2010	2011	2012
Total Outbound holiday trips (000)	19,684	21,886	23,864	23,437	25,687	27,315	28,995
Non-US Outbound holiday trips (000)	6,032	6,633	7,309	7,517	7,995	8,356	8,804
Total visits (000)	100	103	108	98	98	109	120
Holiday visits (000)	53	43	52	58	50	60	75
Promotable visitors (000)	56	46	55	62	51	69	85
Revenue (€mn)	77	87	74	74	85	85	110
Revenue (£mn)	63	71	61	60	75	76	98

All Euro (€) / Sterling (£) conversions have been carried out at a rate of €1 = £0.815
(Revenue does not include carrier receipts or international air and sea fares)
Promotable visits = Holiday, Conference/Incentive & EFL (English as a foreign language)
Data source: Tourism Ireland fact card 2012.

Holidaymakers at a glance ...

When do holidaymakers arrive?

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

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

When did holidaymakers decide to visit?**

Month Decided to visit	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%

** In all cases, tables with two stars indicates that data excludes direct holidaymakers to Northern Ireland.

When did holidaymakers make a reservation?**

Month reserved part of trip	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	2006	2007	2008	2009	2010	2011	2012
Air	88%	93%	87%	85%	92%	95%	75%
Sea	12%	7%	13%	15%	8%	5%	25%

What is the length of stay for holidaymakers on the island of Ireland?

Length of stay	2006	2007	2008	2009	2010	2011	2012
1-5 nights	15%	26%	37%	26%	28%	36%	31%
6-8 nights	32%	33%	30%	33%	26%	17%	34%
9-14 nights	43%	25%	22%	26%	35%	43%	27%
15+ nights	10%	17%	11%	14%	11%	3%	9%
Average number of nights	*9.0*	*10.8*	*8.8*	*9.2*	*10.8*	*8.3*	*15.4*

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

Where do holidaymakers stay? (Distribution of bednights)

Accommodation	2006	2007	2008	2009	2010	2011	2012
Hotels	42%	58%	33%	24%	35%	44%	34%
Guesthouses & B&B's	34%	15%	22%	20%	16%	26%	33%
Rented	17%	17%	6%	12%	31%	7%	13%
Caravan/Camping	0%	2%	1%	2%	1%	0%	1%
Friends & Relatives	3%	4%	12%	17%	5%	2%	2%
Other	4%	6%	26%	24%	11%	21%	17%

Where do holidaymakers visit on the island of Ireland?

Regions visited	2006	2007	2008	2009	2010	2011	2012
Dublin	75%	84%	75%	74%	71%	85%	72%
Midlands East	12%	20%	10%	7%	13%	11%	13%
South Eastern	36%	47%	37%	21%	29%	18%	21%
South West	66%	39%	56%	35%	49%	53%	50%
Midwest	37%	10%	30%	28%	40%	23%	21%
Western	51%	34%	33%	28%	40%	32%	43%
Northwest	15%	5%	9%	10%	12%	14%	14%
Northern Ireland	30%	47%	22%	27%	36%	30%	23%

How many holidaymakers use a car?

Car Usage	2006	2007	2008	2009	2010	2011	2012
Car Not Used	56%	58%	63%	67%	54%	69%	47%
Car Hire	41%	38%	36%	32%	44%	29%	42%
Car Brought	4%	4%	1%	1%	2%	2%	12%

How do holidaymakers make their travel arrangements?

Travel Arrangement	2006	2007	2008	2009	2010	2011	2012
Package	22%	23%	22%	21%	34%	36%	28%
Independent	78%	77%	78%	79%	66%	64%	72%

Use of internet to book part of trip**

	2006	2007	2008	2009	2010	2011	2012
Yes	49%	71%	87%	73%	61%	59%	60%
No	51%	29%	13%	27%	39%	41%	40%

Items booked online**

	2006	2007	2008	2009	2010	2011	2012
Air-Sea tickets	42%	60%	79%	58%	55%	44%	52%
Accommodation	25%	43%	68%	58%	47%	44%	46%
Car hire	12%	22%	22%	12%	17%	11%	18%
Other	3%	2%	0%	2%	8%	0%	0%

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Sites visited if using the internet**

	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	2006	2007	2008	2009	2010	2011	2012
First visit	79%	85%	81%	82%	71%	78%	61%
Repeat visit	20%	14%	18%	16%	27%	20%	30%
Born on the island of Ireland	1%	2%	1%	2%	2%	3%	8%

What is the social class profile of holidaymakers?

Social Class	2006	2007	2008	2009	2010	2011	2012
AB	34%	22%	9%	18%	25%	33%	28%
C1	56%	62%	76%	74%	54%	61%	62%
C2	6%	10%	15%	6%	17%	4%	7%
DEF	3%	6%	1%	2%	4%	2%	3%

What age are holidaymakers?

Age	2006	2007	2008	2009	2010	2011	2012
Under 16	0%	1%	6%	4%	6%	2%	0%
16-24	10%	18%	25%	22%	11%	19%	19%
25-34	10%	16%	20%	20%	8%	25%	12%
35-44	8%	4%	11%	8%	11%	8%	11%
45-54	25%	18%	22%	18%	26%	6%	19%
55+	47%	43%	16%	28%	38%	40%	38%

Who do holidaymakers travel with?

Party Composition	2006	2007	2008	2009	2010	2011	2012
Alone	26%	30%	16%	25%	18%	26%	36%
Couple	34%	35%	35%	37%	49%	26%	39%
With family	21%	14%	21%	18%	15%	15%	11%
Other Adult Party	19%	21%	28%	20%	18%	33%	14%

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

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

	2006	2007	2008	2009	2010	2011	2012
Any Of The Below	95%	94%	95%	94%	87%	82%	91%
Ancient Celtic sites	N/A	N/A	N/A	N/A	N/A	N/A	26%
Churches/Cathedrals	N/A	N/A	N/A	N/A	N/A	N/A	63%
Historic Houses/Castles	91%	89%	86%	87%	82%	74%	70%
Monuments	81%	73%	79%	74%	72%	63%	45%
Heritage/Interpretative Centres	51%	54%	63%	62%	70%	56%	56%
Museums/Art Galleries	51%	47%	46%	58%	58%	56%	48%
Other Sites Of Cultural Historical Interest	5%	17%	15%	12%	3%	12%	29%
None Of These	5%	6%	5%	6%	13%	18%	9%

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

	2006	2007	2008	2009	2010	2011	2012
Visited Gardens	22%	35%	33%	42%	35%	37%	21%
Visited National Parks/Forests	n/a	n/a	n/a	42%	44%	36%	20%
Attended An Organised Sporting Event	5%	9%	0%	4%	4%	1%	0%
Tracing Roots/Geneology	6%	2%	0%	5%	11%	1%	1%
Attended Cultural Event/Festival	5%	16%	11%	8%	11%	6%	9%
Used Spa Facilities	3%	1%	0%	0%	0%	3%	4%
None Of These	n/a	n/a	63%	41%	38%	46%	60%

What activities do our holidaymakers engage in?**

	2006	2007	2008	2009	2010	2011	2012
Fishing	0%	1%	0%	1%	2%	0%	6%
Equestrian Pursuits	0%	1%	0%	1%	0%	0%	0%
Cycling	6%	4%	4%	3%	2%	0%	2%
Golf	5%	3%	1%	4%	14%	5%	9%
Hiking/Cross-Country Walking	21%	10%	9%	23%	25%	12%	9%
Other Water Based Activities	0%	1%	0%	1%	6%	2%	0%

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

Regionality Segments	2006	2007	2008	2009	2010	2011	2012
Dublin Only	14%	14%	21%	28%	15%	32%	10%
Tourer	63%	48%	55%	42%	57%	46%	42%
Static Regional	9%	13%	13%	10%	16%	0%	16%
Two Bases	12%	25%	11%	19%	8%	22%	32%

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

Regions visited	2006	2007	2008	2009	2010	2011	2012
NI		5%	2%	14%	8%	8%	12%
England/Isle of Man/Channel islands		22%	42%	33%	27%	29%	33%
Scotland		9%	12%	8%	19%	10%	18%
Wales		0%	0%	2%	5%	9%	17%
France		13%	13%	20%	11%	18%	5%
Germany		6%	9%	11%	5%	8%	0%
Italy		5%	14%	15%	2%	0%	5%
Benelux		19%	6%	15%	4%	3%	4%
Scandinavia		0%	5%	5%	2%	1%	1%
Other European		4%	8%	16%	9%	6%	12%
Elsewhere		1%	0%	4%	1%	5%	2%

Where do our holidaymakers come from?**

	2006	2007	2008	2009	2010	2011	2012
Quebec (Montreal, Quebec)	11%	10%	1%	4%	4%	23%	11%
Newbrunswick(St.John)	0%	0%	4%	0%	0%	0%	0%
Nova Scotia(Halifax)	6%	0%	0%	1%	5%	4%	2%
Newfoundland/Labrador(St.John)	0%	10%	9%	3%	4%	0%	1%
Ontario(Toronto, Ottawa)	52%	19%	40%	66%	69%	40%	57%
Manitoba(Winnipeg)	2%	0%	2%	6%	0%	2%	0%
Saskatchewan(Regina, Prince Albert)	5%	1%	8%	0%	1%	0%	5%
Alberta (Calgary, Edmonton)	8%	29%	22%	12%	9%	10%	11%
British Columbia(Vancouver)	14%	31%	14%	7%	9%	19%	9%
North West Territories (Yellow Knife)	n/a	n/a	n/a	n/a	n/a	3%	1%

sources: Failte Ireland's Survey of Travellers (SOT) and NITB / NISRA's Northern Ireland Passenger Survey (NIPS)

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What do Holidaymakers think of Ireland?

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

Did the desire for these experiences influence Canadian holidaymakers' decision to visit?*

source: Failte Ireland's Visitor Attitude Survey 2012

* NB: Northern Ireland attractions such as the Giant's Causeway not included in this question

% Holidaymakers who said yes	Canada
	%
An Irish pub	90%
An Irish castle	75%
Dublin's heritage and culture	72%
The Cliffs of Moher	54%
The Ring of Kerry	41%
Connemara	40%
The Rock of Cashel	20%

Canadians have a wide variety of experiences they want to have on their holiday on the island of Ireland. Pubs, castles, scenery and the culture of the city, with both Dublin and Belfast getting a call-out.

Did you experience any of the following on your holiday in Ireland?*

source: Failte Ireland's Visitor Attitude Survey 2012

* NB: Northern Ireland attractions such as the Giant's Causeway not included in this question

% Holidaymakers who said yes	Canada
	%
Have you tasted Guinness?	87%
Have you listened to live music in a pub?	87%
Have you visited coastal towns?	86%
Have you visited food or craft markets?	54%
Have you took part in a city tour?	53%
Have you followed a literary trail?	19%

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