

# CANADA

## MARKET PROFILE 2023



### INBOUND TOURISTS

The island of Ireland welcomed around 180,000 Canadian tourists who spent almost €255/£222 million and stayed 1.9 million nights in 2023. Canada was the island's sixth-largest source of overseas revenue and the eighth-largest source of nights and tourists.



### WHERE DID OUR TOURISTS COME FROM?

More than half (56%) of Canadian tourists came from Ontario while a fifth (22%) came from British Columbia.



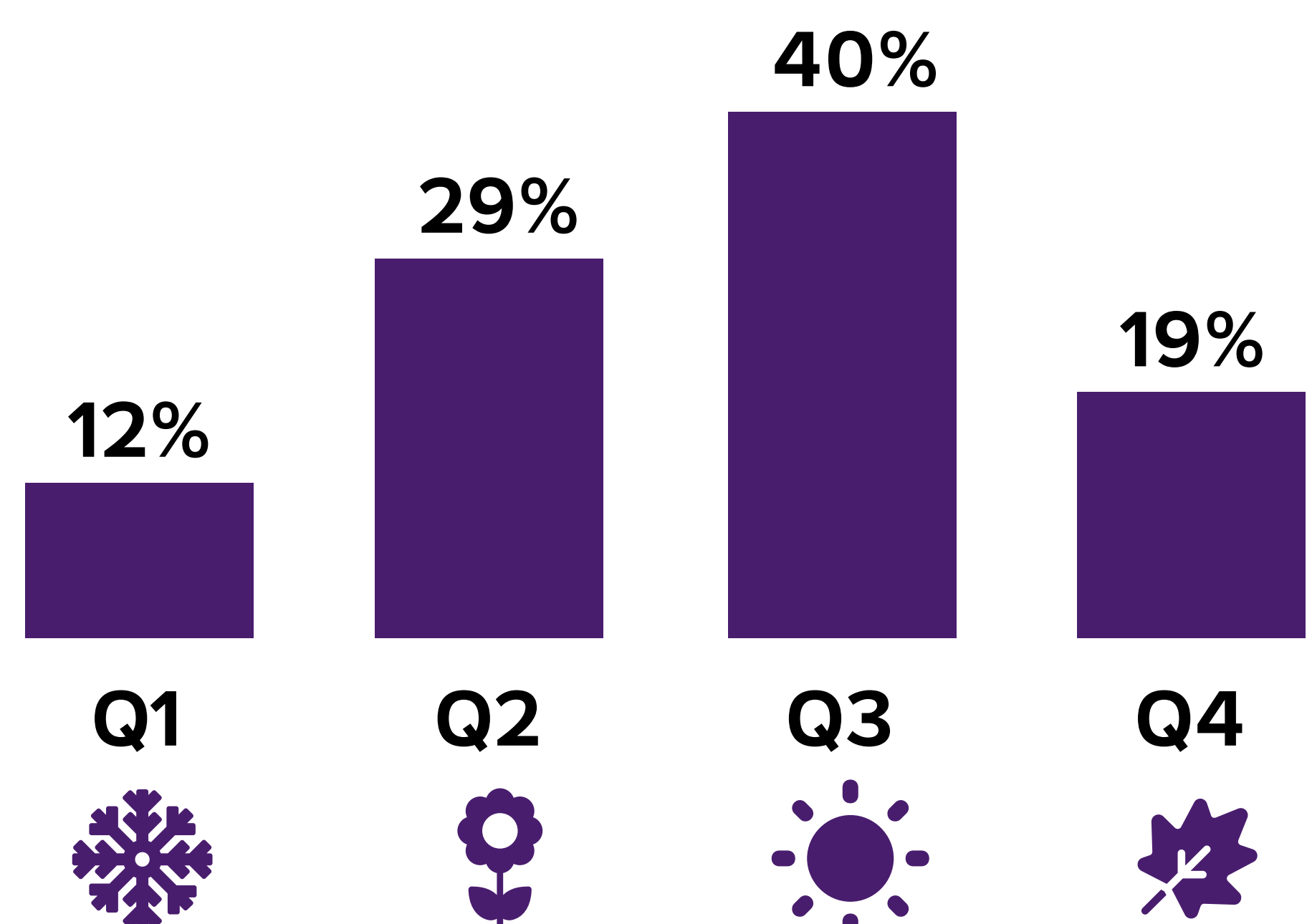
### WHERE DID OUR TOURISTS VISIT?



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

### WHEN DID OUR TOURISTS VISIT?





Seven-in-ten (69%) Canadian tourists visited the island during Q2 and Q3 (April - September).



# INBOUND TOURISTS

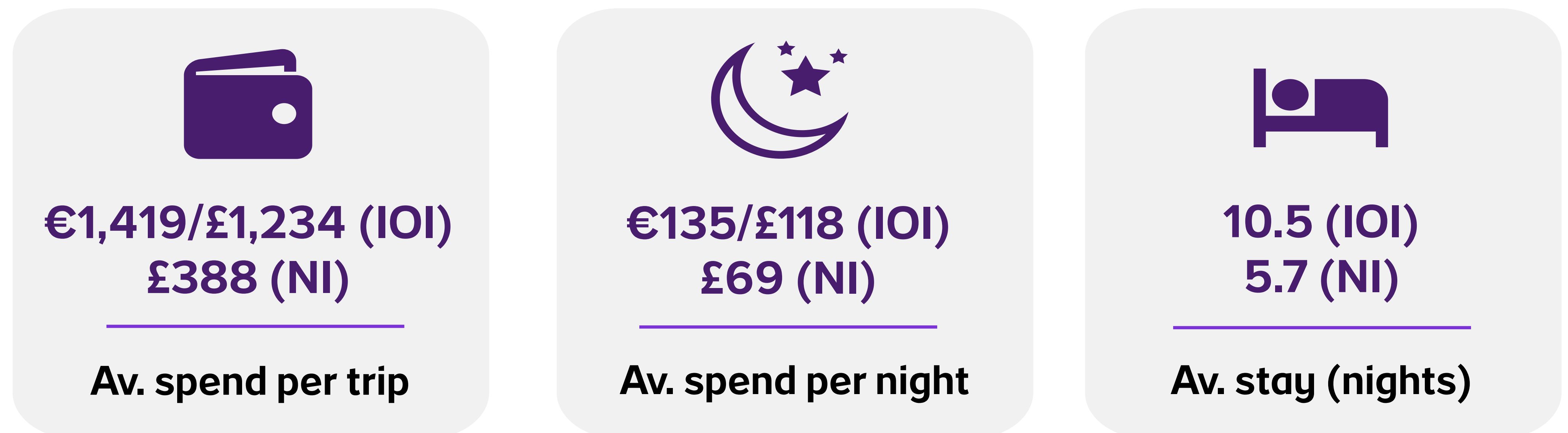
## WHAT WERE OUR TOURISTS' REASONS FOR VISITING?

Around three-in-five (62%) Canadian tourists visiting the island of Ireland came for a holiday, accounting for 69% of Canadian tourism revenue. Almost three-in-ten (29%) were visiting friends and/or relatives.

		REVENUE	SHARE	TRIPS	SHARE	NIGHTS	SHARE
	HOLIDAY	€175/£152m	69%	112k	62%	914k	48%
	VFR	€46/£40m	18%	53k	29%	710k	38%
	BUSINESS	€13/£11m	5%	8k	4%	67k	4%
	OTHER	€21/£19m	8%	10k	6%	195k	10%

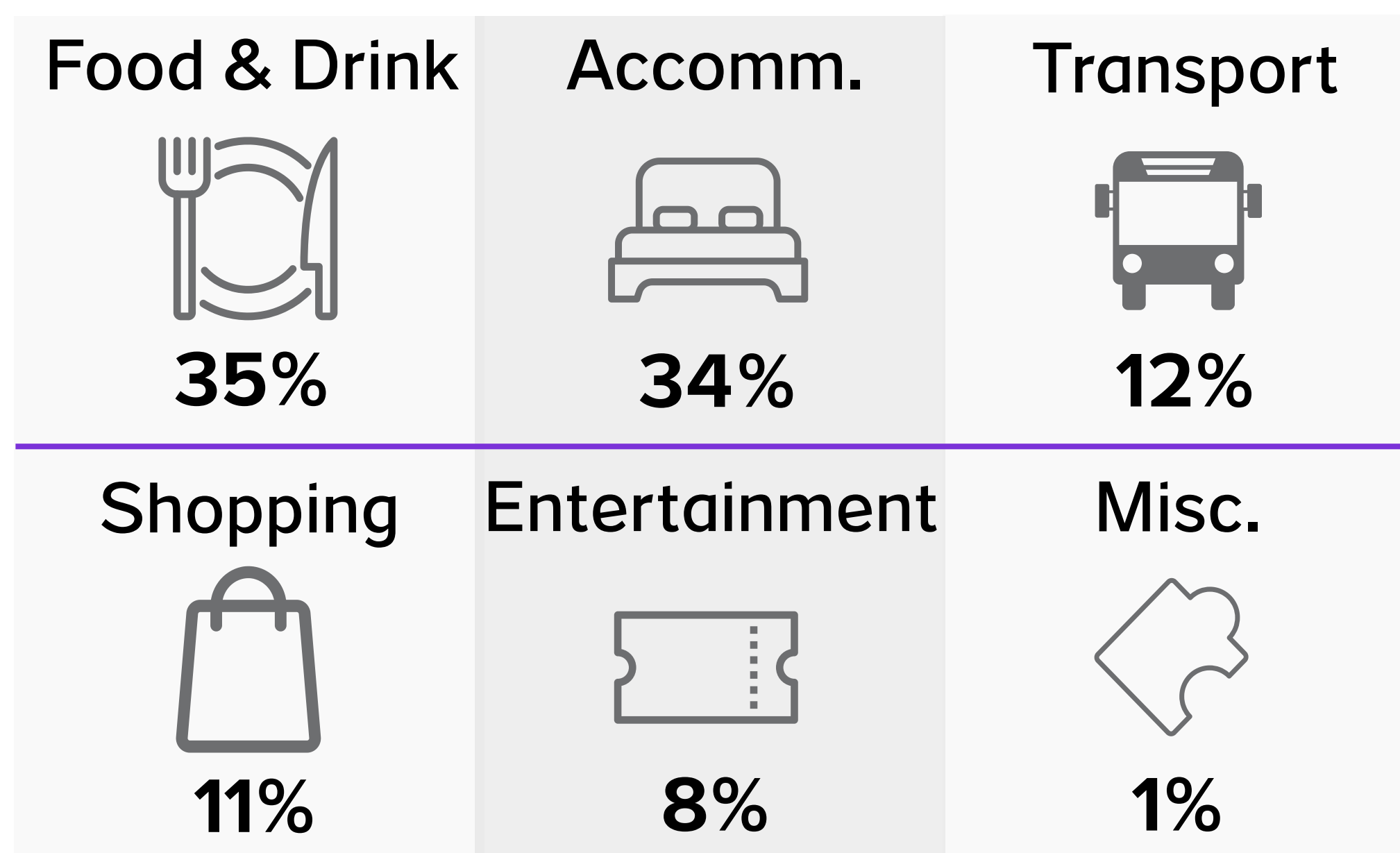
## HOW MUCH DID OUR TOURISTS SPEND AND HOW LONG DID THEY STAY?

On average, Canadian tourists spent €1,419/£1,234 per trip or €135/£118 per night and stayed 10.5 nights on the island of Ireland.



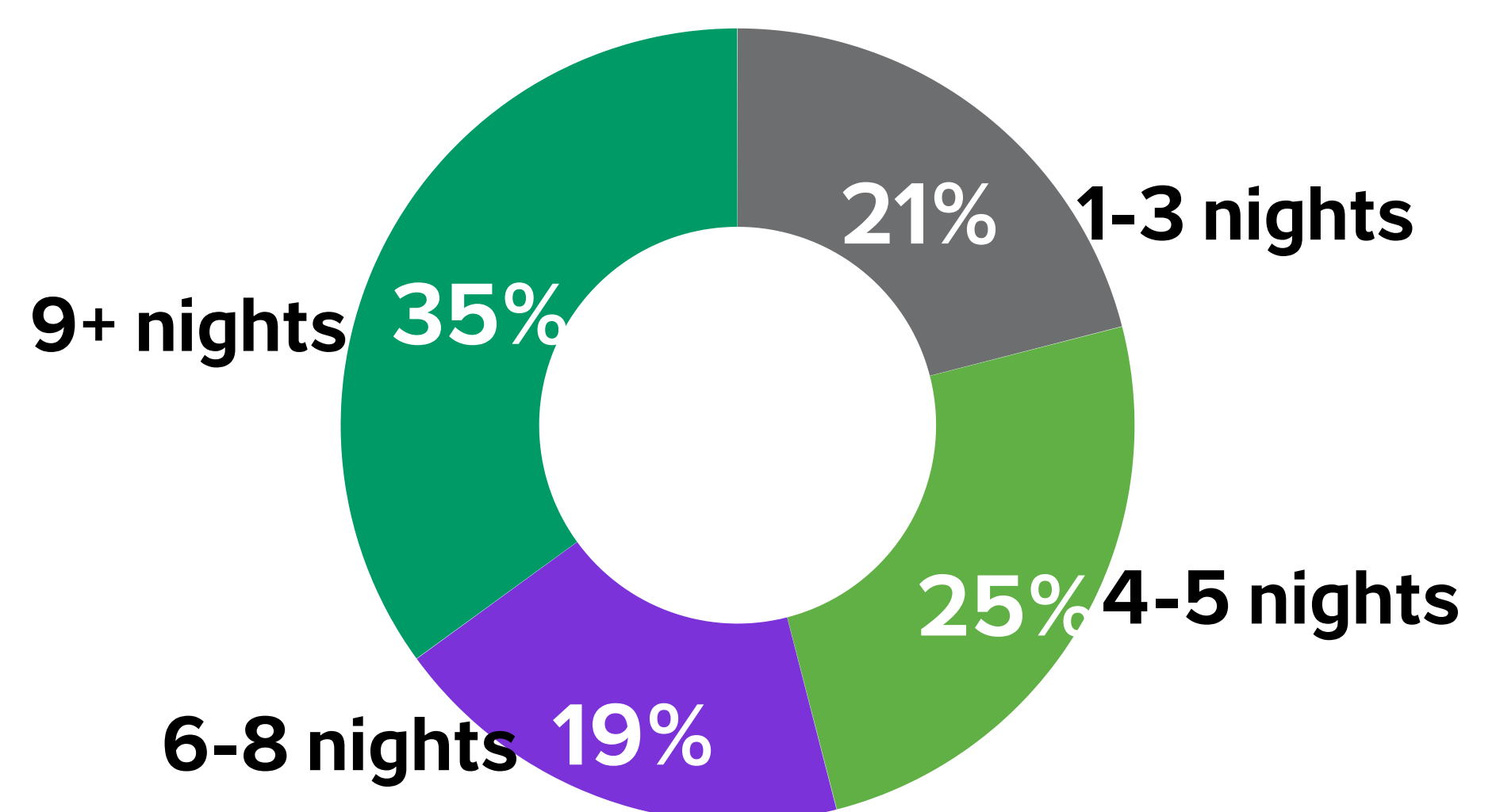
## HOW DID OUR TOURISTS SPEND THEIR MONEY?

Over a third (35%) of Canadian tourists' revenue was spent on food and drink. A similar share (34%) was spent on accommodation.



## HOW LONG DID OUR TOURISTS STAY?

Four-fifths (79%) stayed four or more nights on the island of Ireland.





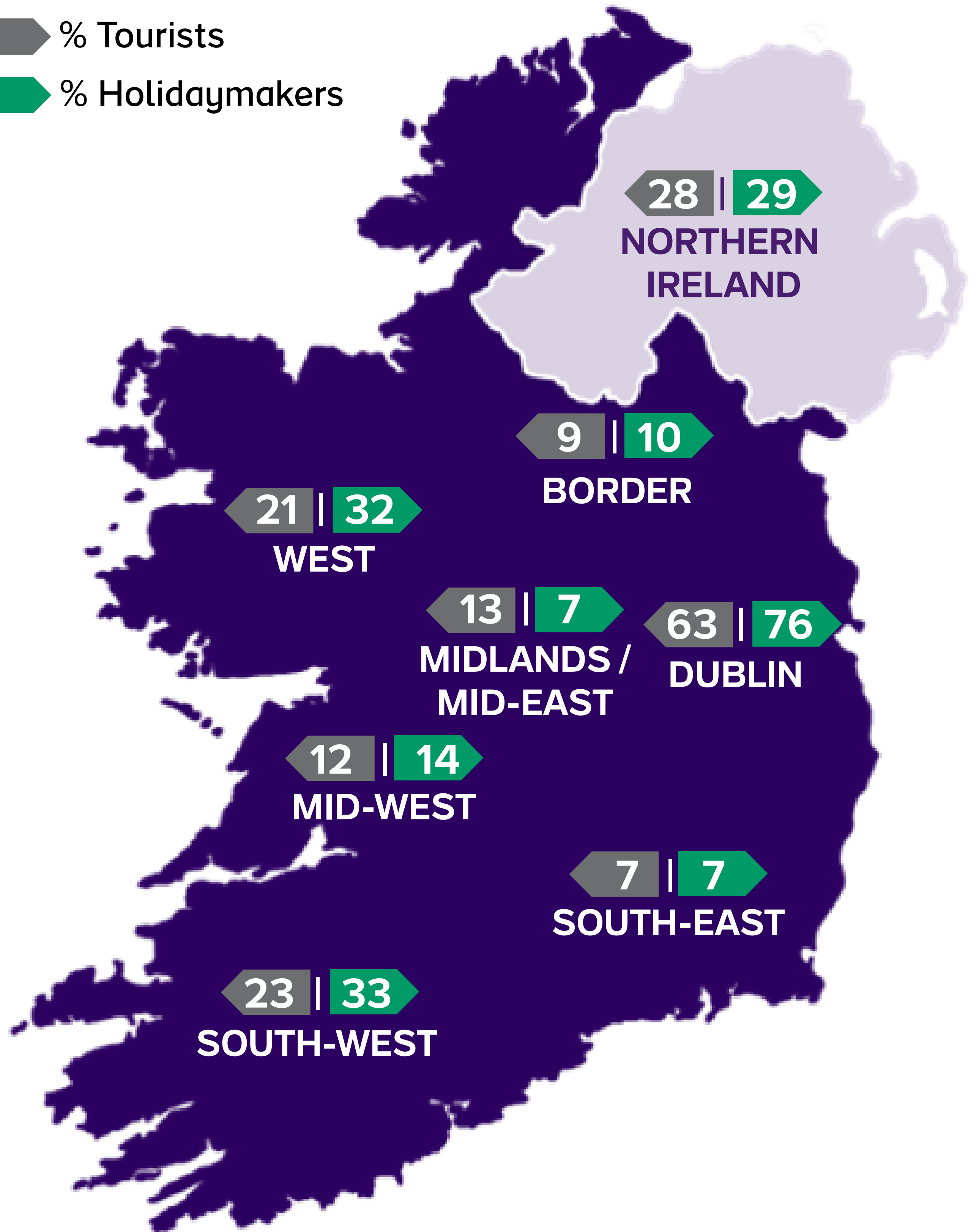
# INBOUND TOURISTS AND HOLIDAYMAKERS

## WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin, the South West, the West and Northern Ireland were the most popular regions for both Canadian tourists and holidaymakers.

One-in-five (21%) of Canadian tourists and one-in-four (26%) of holidaymakers overnighted on both sides of the border.

▶ % Tourists  
▶ % Holidaymakers

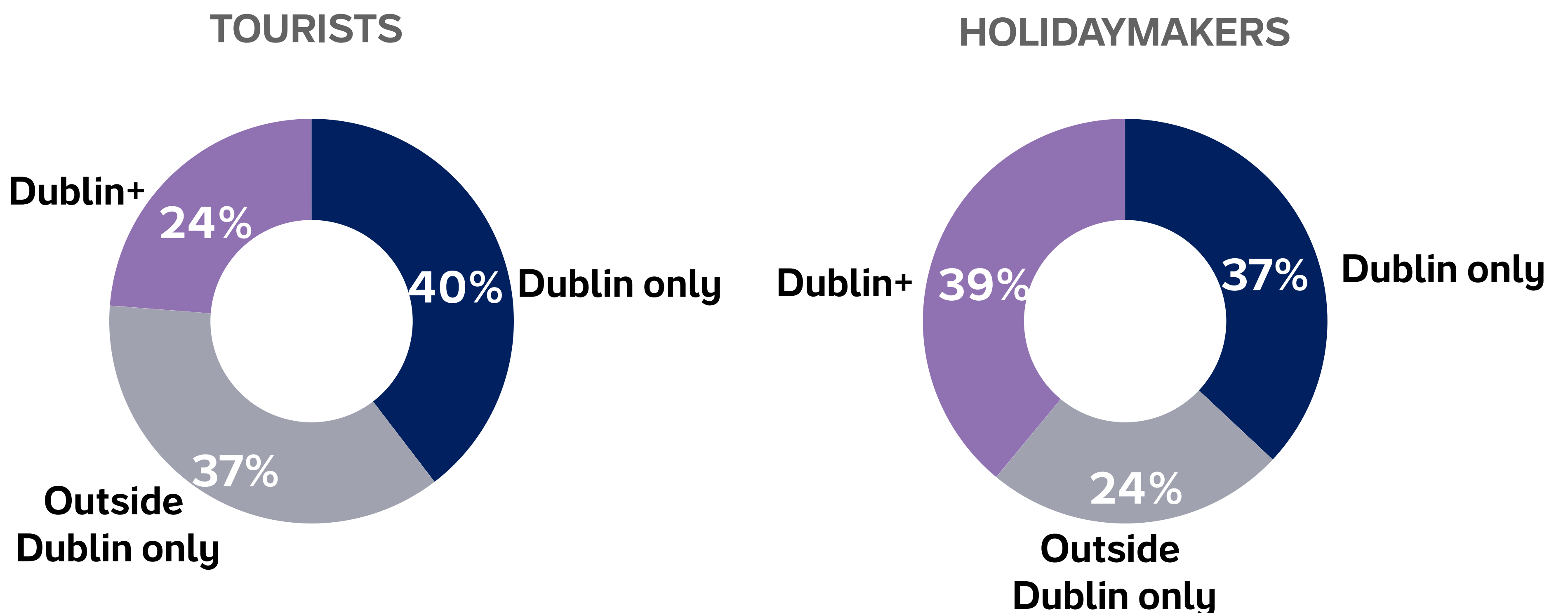


Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	Northern Ireland	South-West
#3	South-West	West

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

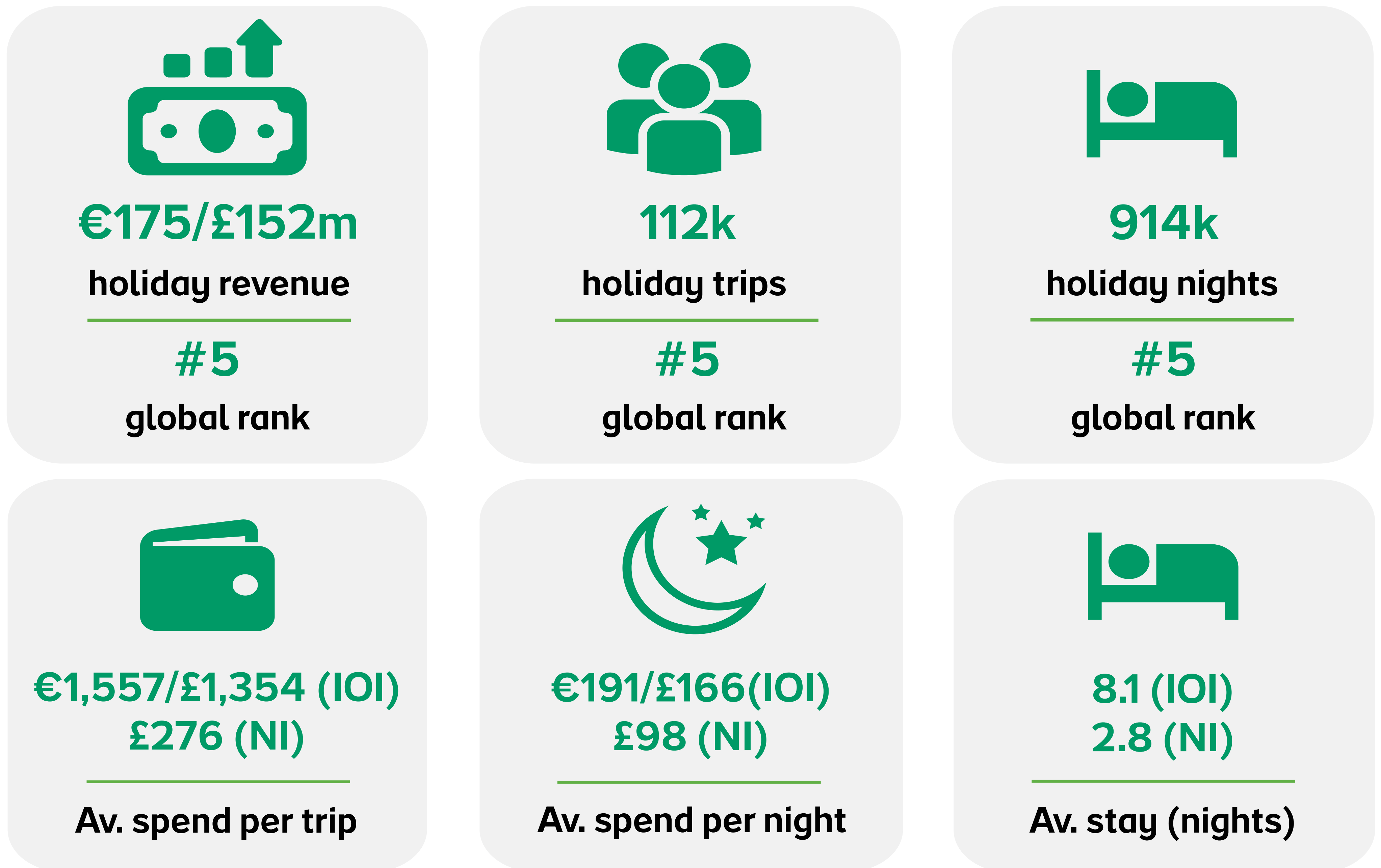
## WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Canadian tourists (63%) and holidaymakers (76%).



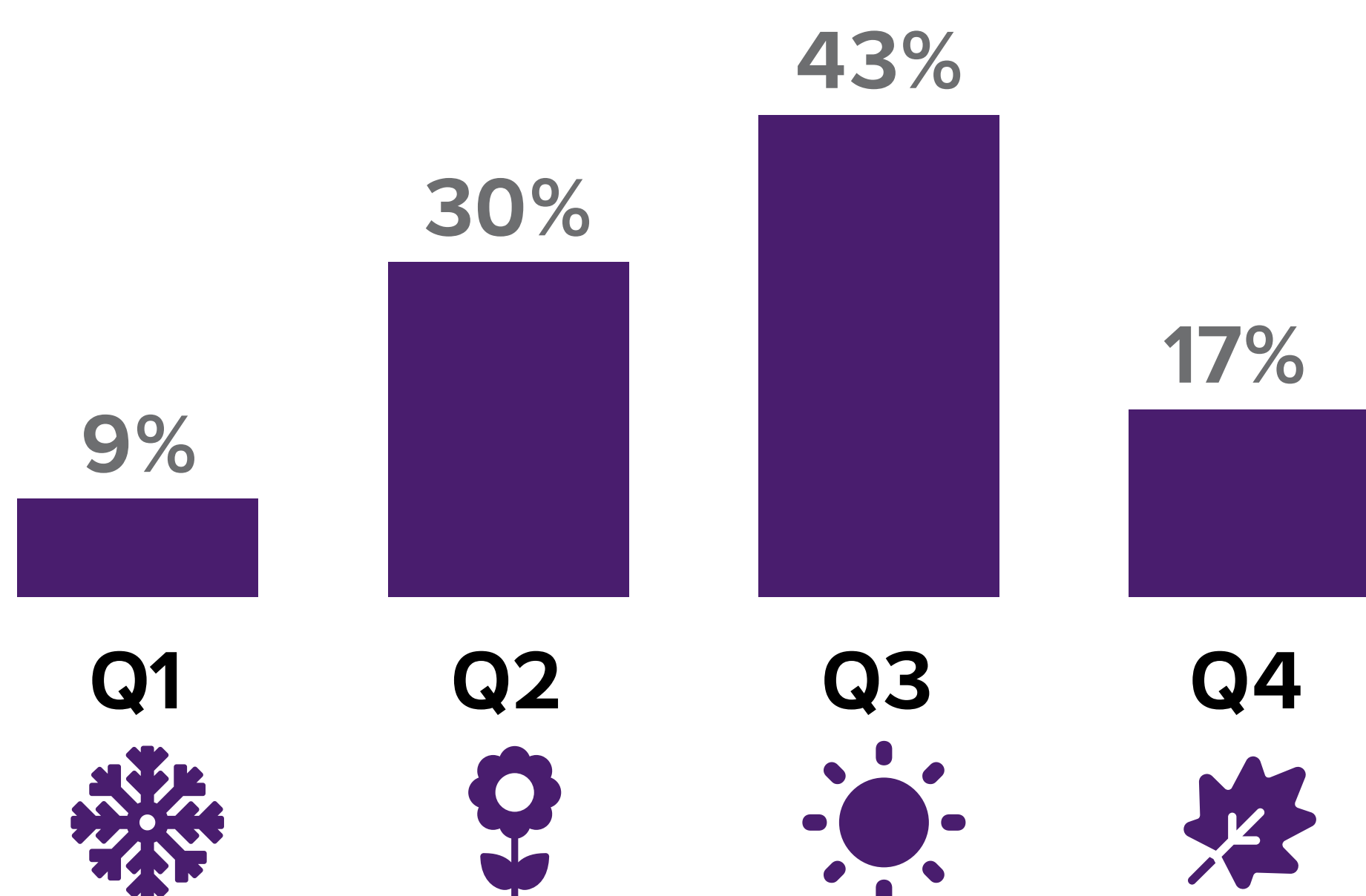
# INBOUND HOLIDAYMAKERS

Canada was the island of Ireland’s fifth-largest source of holiday revenue, holidaymakers and holiday nights. Canadian holidaymakers typically spend more per night (€191/£166) than the average overseas holidaymaker (€150/£130).



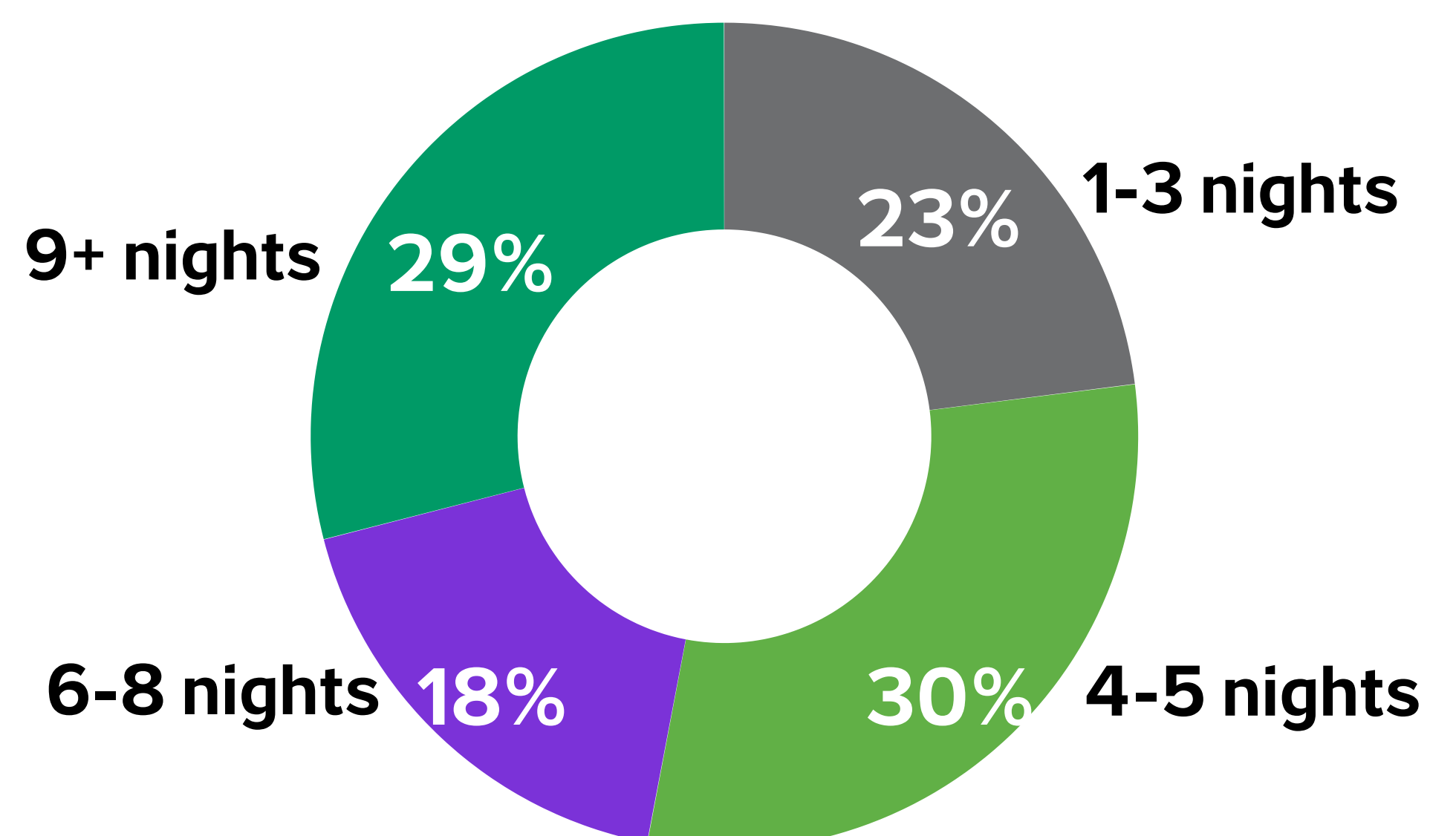
## WHEN DID OUR HOLIDAYMAKERS VISIT?

Almost three-quarters (73%) visited the island of Ireland during Q2 and Q3 (April - September).



## HOW LONG DID OUR HOLIDAYMAKERS STAY?

The majority (77%) of Canadian holidaymakers stayed four or more nights on the island of Ireland.

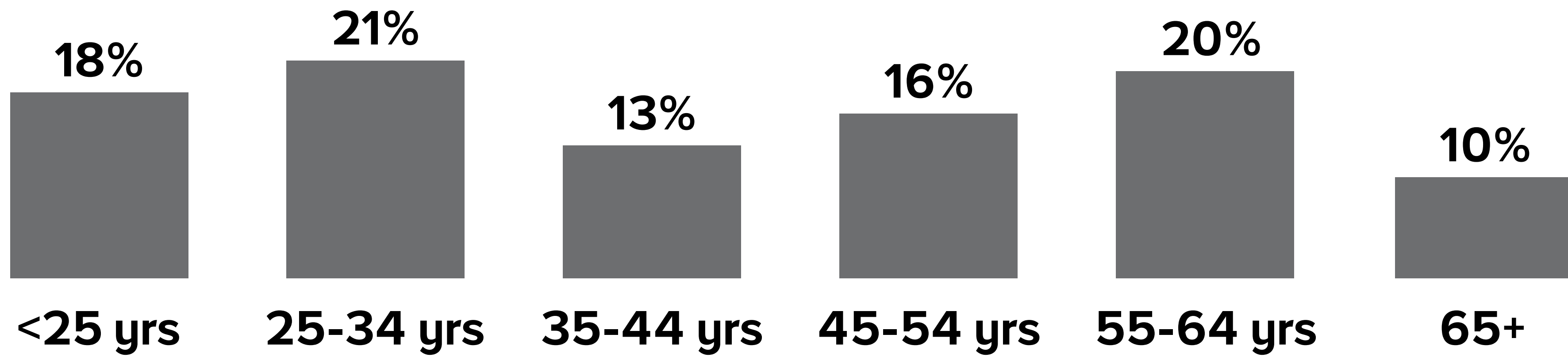




# INBOUND HOLIDAYMAKERS

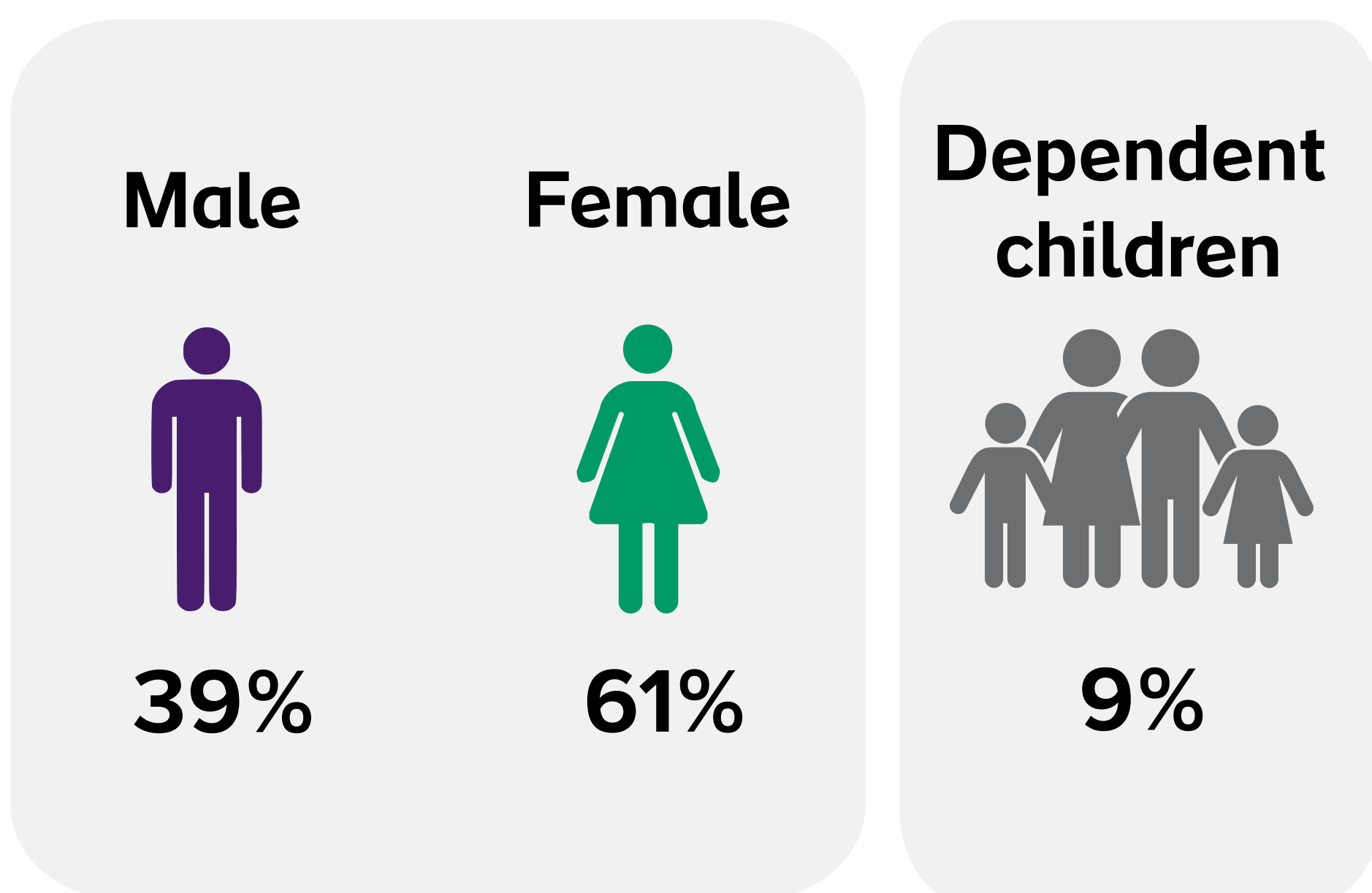
## WHAT AGE WERE OUR HOLIDAYMAKERS?

Two-fifths (39%) Canadian holidaymakers were under 35 years old.



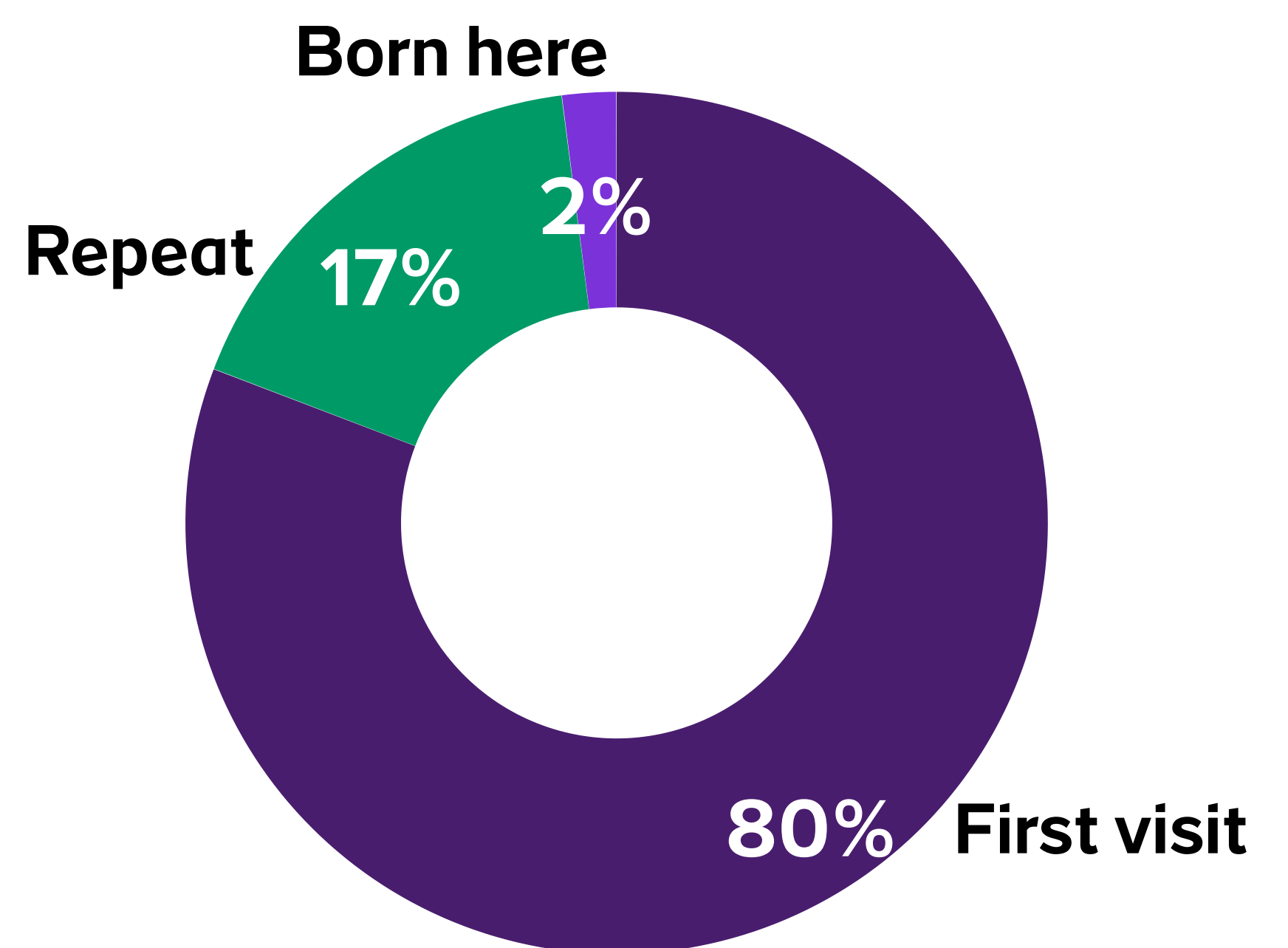
## HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Around three-in-five (61%) Canadian holidaymakers were female. A minority (9%) of Canadian holidaymakers had children in the household.



## HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

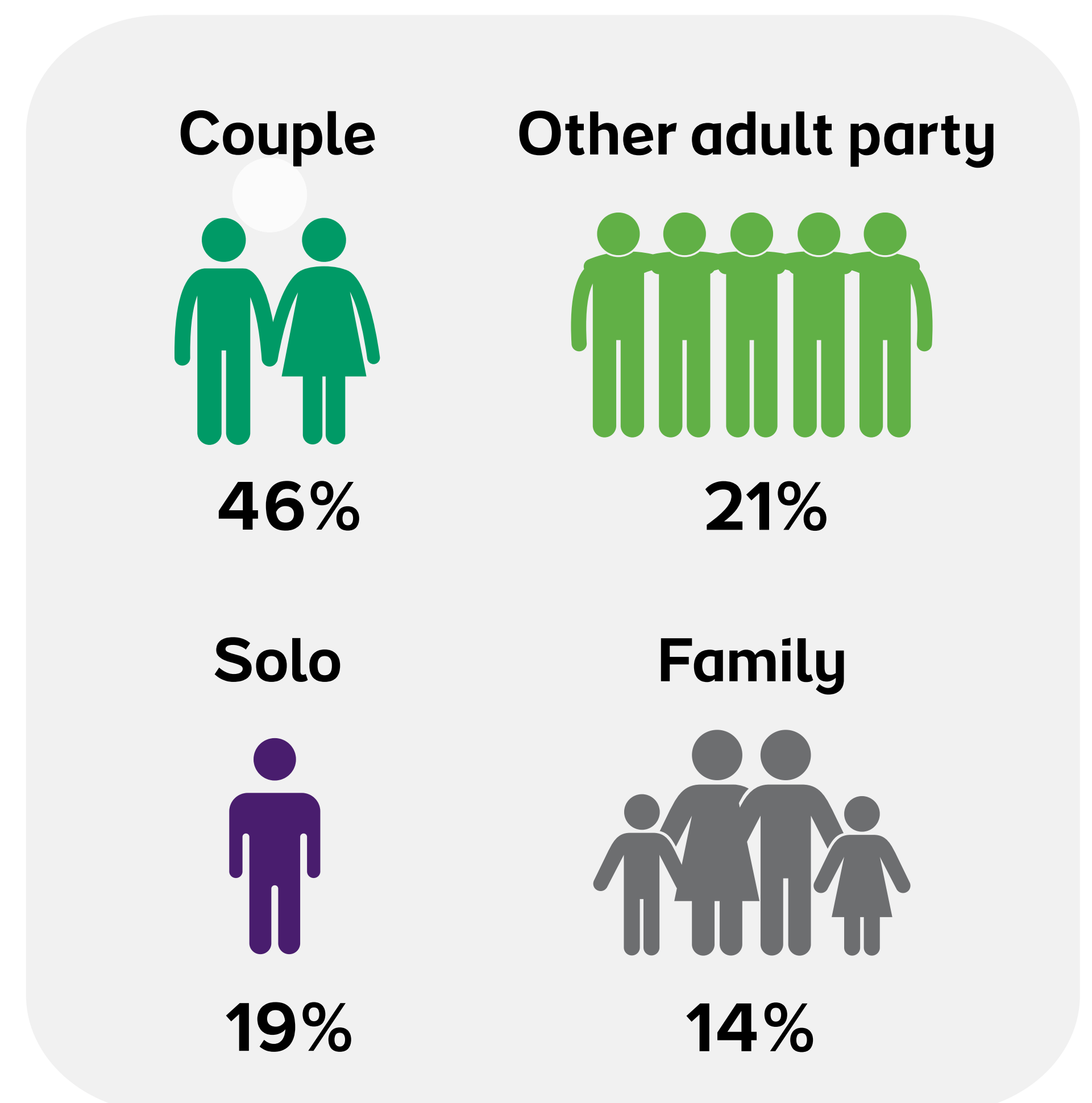
It was a first visit for four-fifths (80%) of Canadian holidaymakers.



## WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Almost half (46%) of Canadian holidaymakers travelled with their spouse/partner.

A fifth (21%) travelled with an "other adult party", while a similar proportion (19%) visited on their own.



## INBOUND HOLIDAYMAKERS

### WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (59%) of nights stayed by Canadian holidaymakers were spent in hotels and around one-in-six (16%) nights were spent in B&Bs or guesthouses.



**59%**

of nights in  
hotels



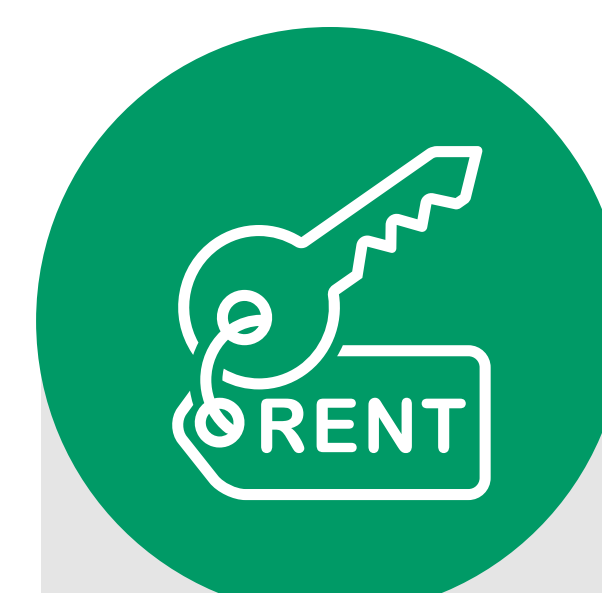
**16%**

of nights in  
B&Bs or  
guesthouses



**7%**

of nights  
with friends  
or family



**6%**

of nights in  
rented  
accomm.



**5%**

of nights in  
hostels



**5%**

of nights on  
campus



**2%**

of nights in  
other  
accomm.

### HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (86%) of Canadian holidaymakers travelled independently and two-fifths (41%) used a car while on the island of Ireland.



**86%**

Travelled  
independently



**14%**

Travelled as  
part of a  
package



**41%**

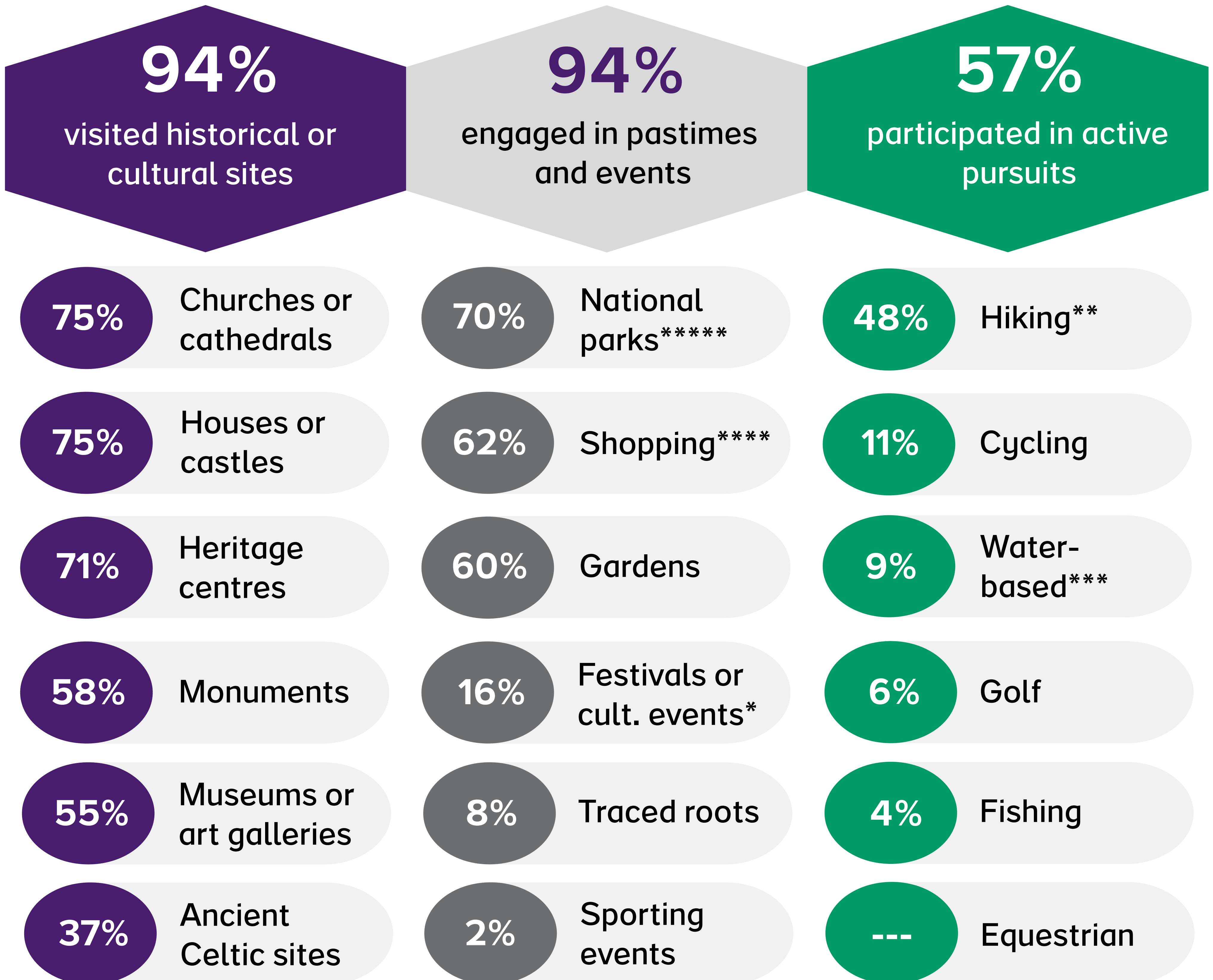
Used a car  
39% Rented  
2% Borrowed/Other



# INBOUND HOLIDAYMAKERS

## WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

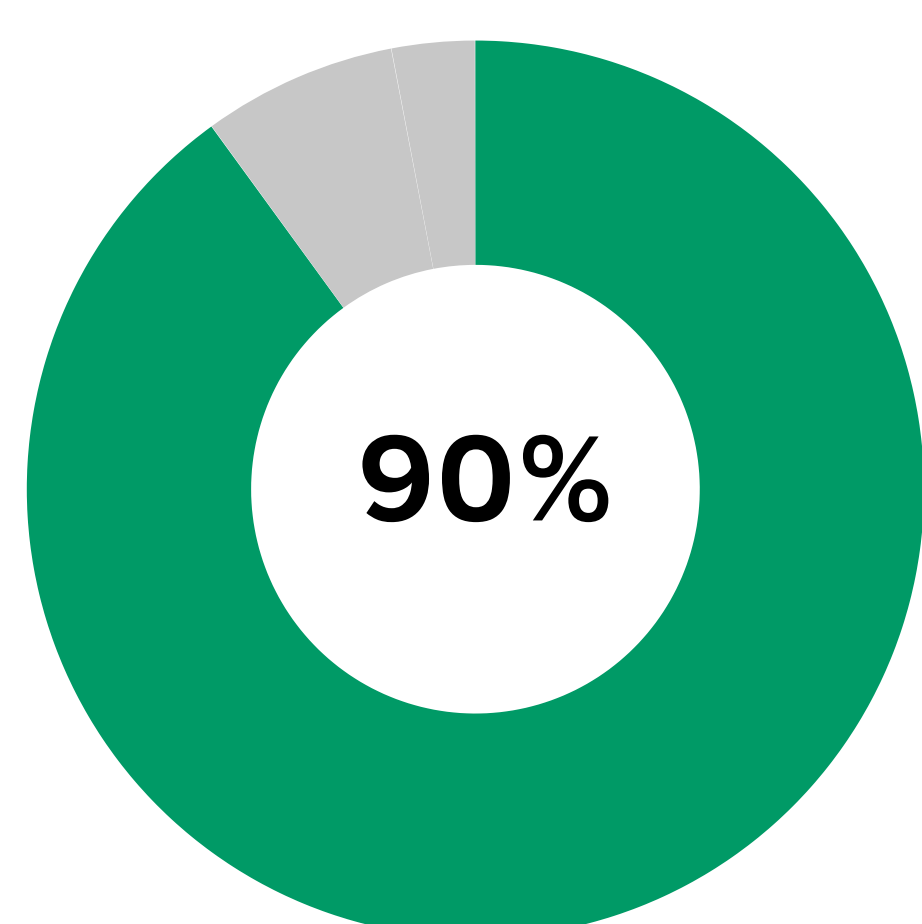
Canadian holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



\*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

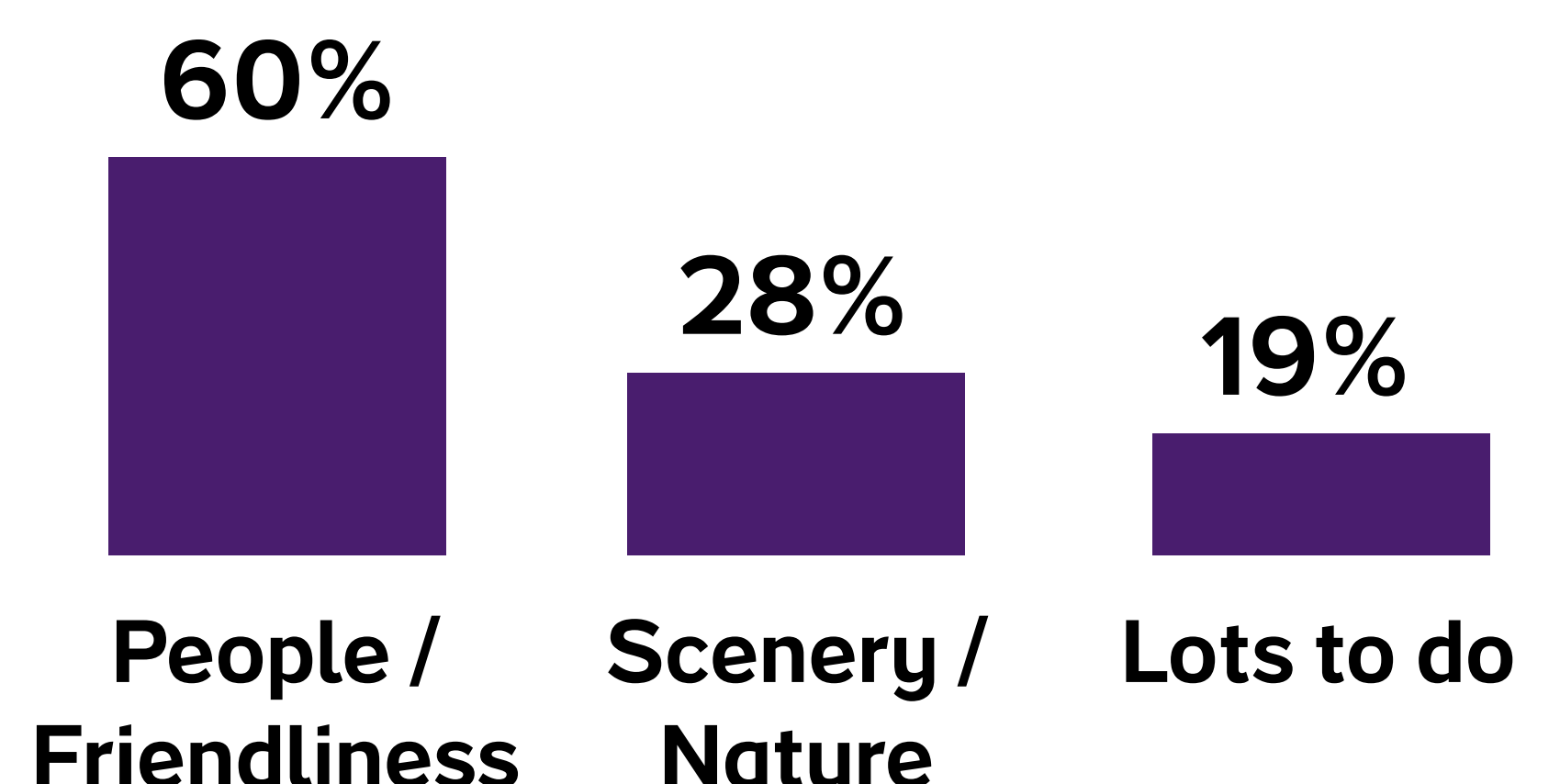
The majority (90%) of Canadian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (60%), the scenery and nature (28%) and that there's lots to do (19%).



**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



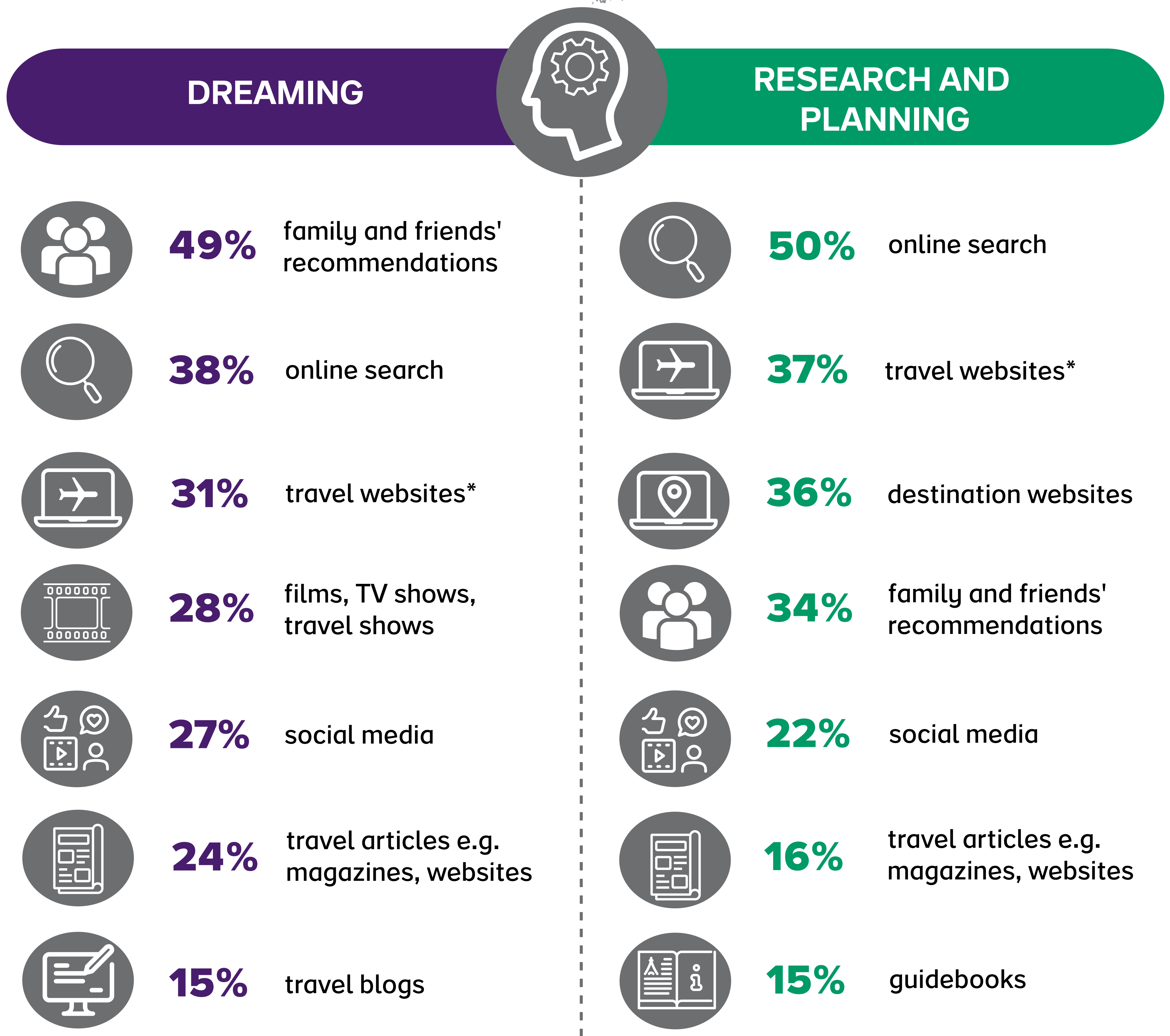
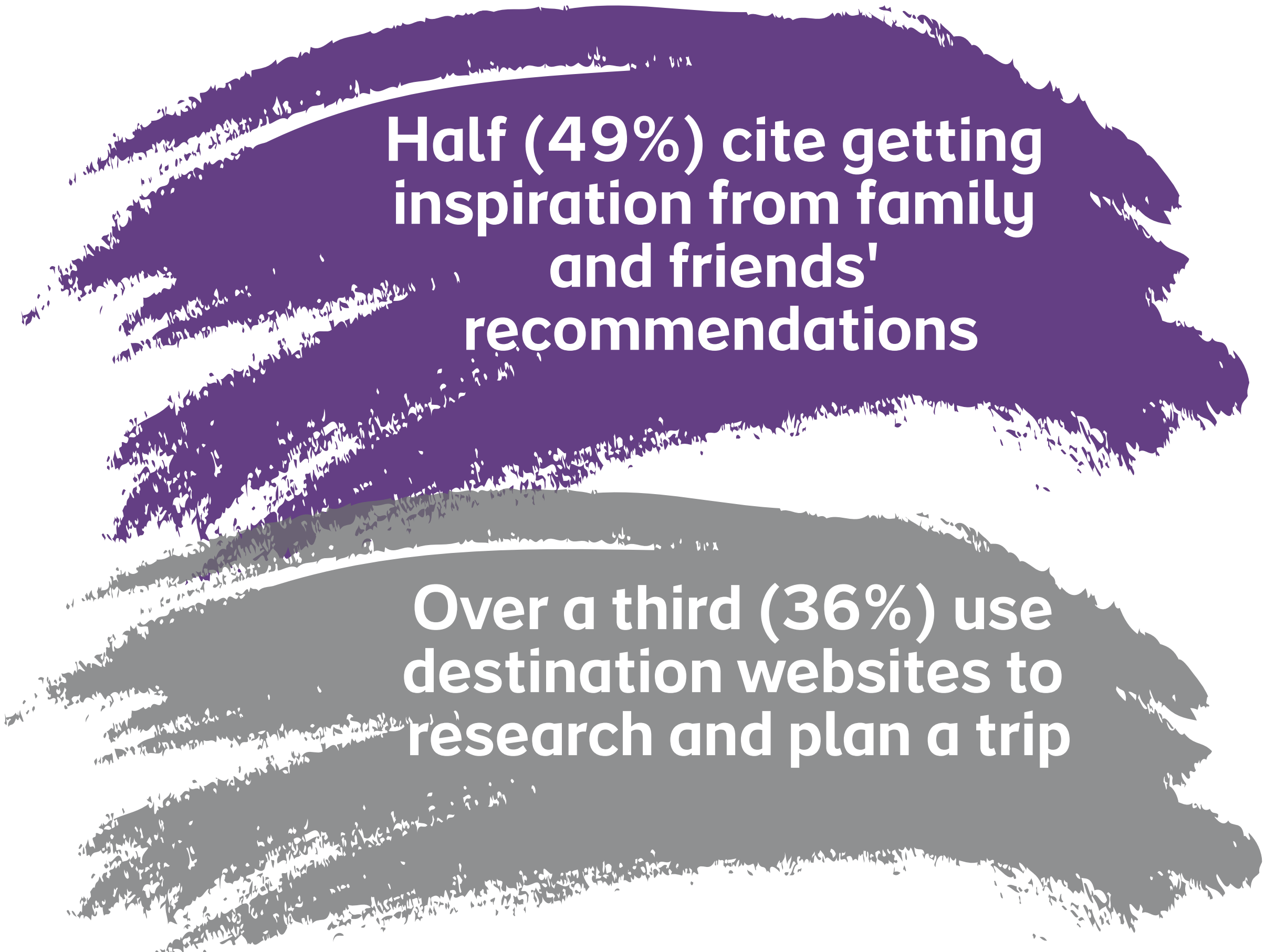


# OUTBOUND HOLIDAYMAKERS

## SOURCES OF INSPIRATION, RESEARCH AND PLANNING

Outbound holidaymakers from Canada 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.

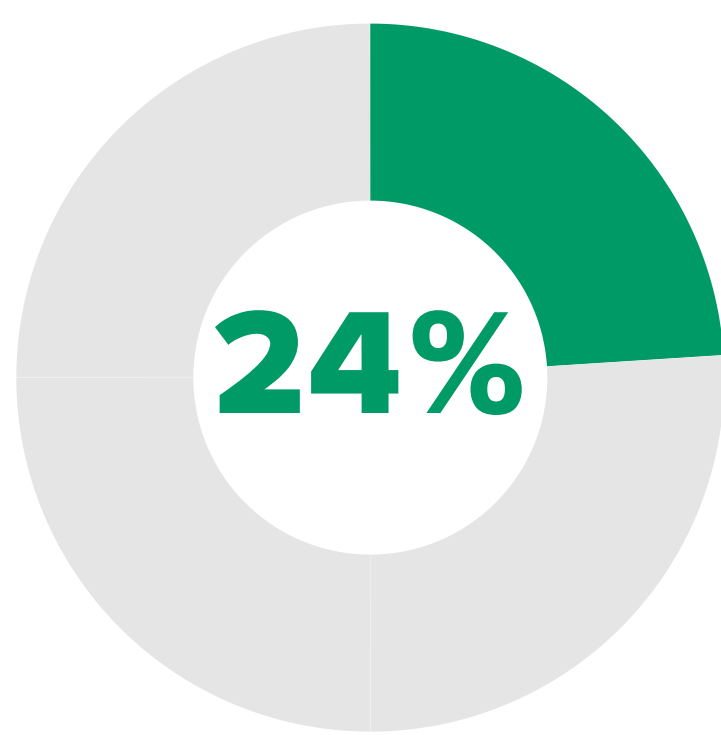


\*Travel websites include company websites and booking platforms

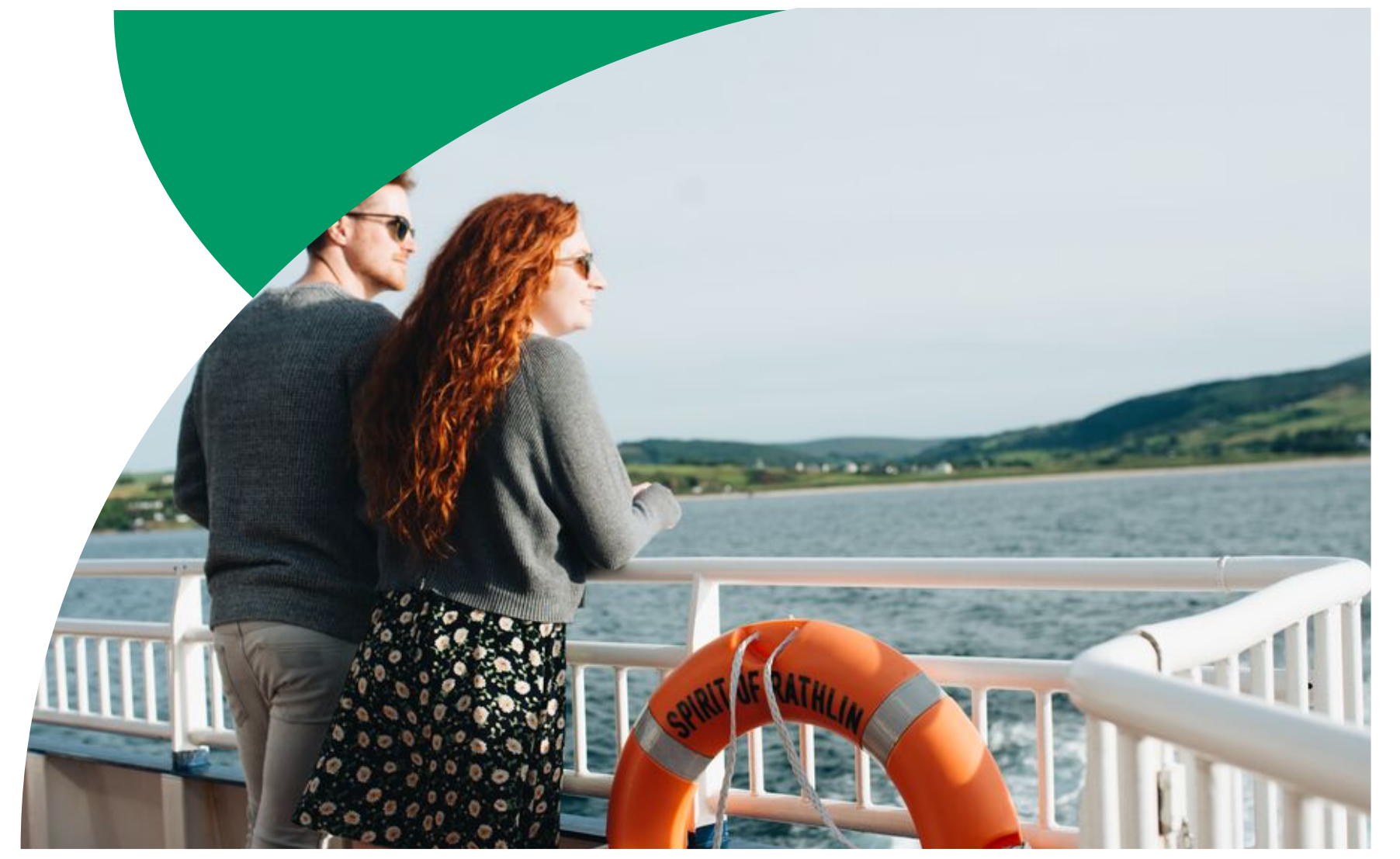


# ENRICHMENT EXPLORERS

## OUR TARGET SEGMENT



of Canadian  
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

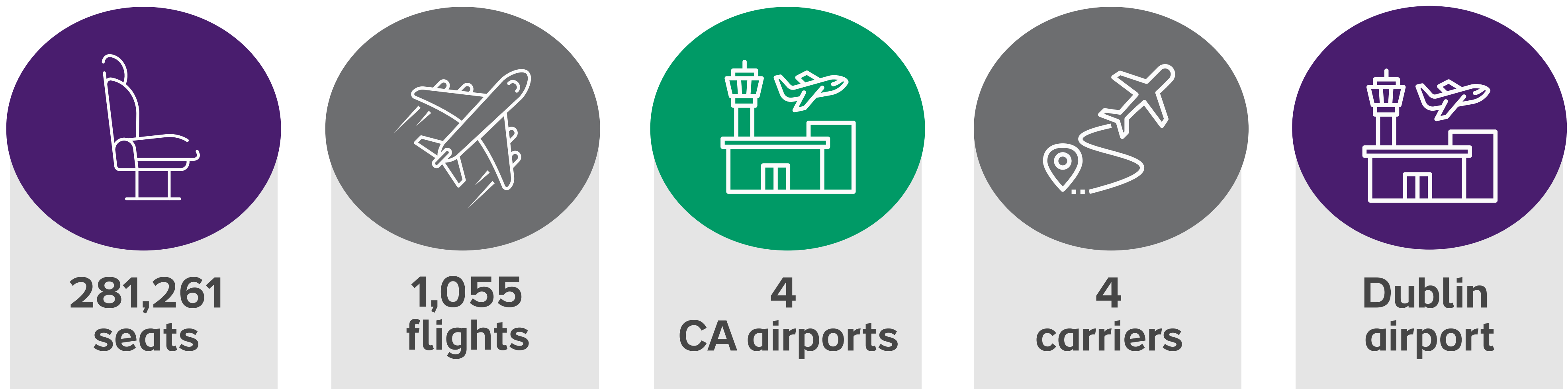


# OUTBOUND TOURISTS

Canada was the world's sixth-largest outbound market in 2023 and 19% of all outbound trips from Canada were to Europe.

## ACCESS BY AIR

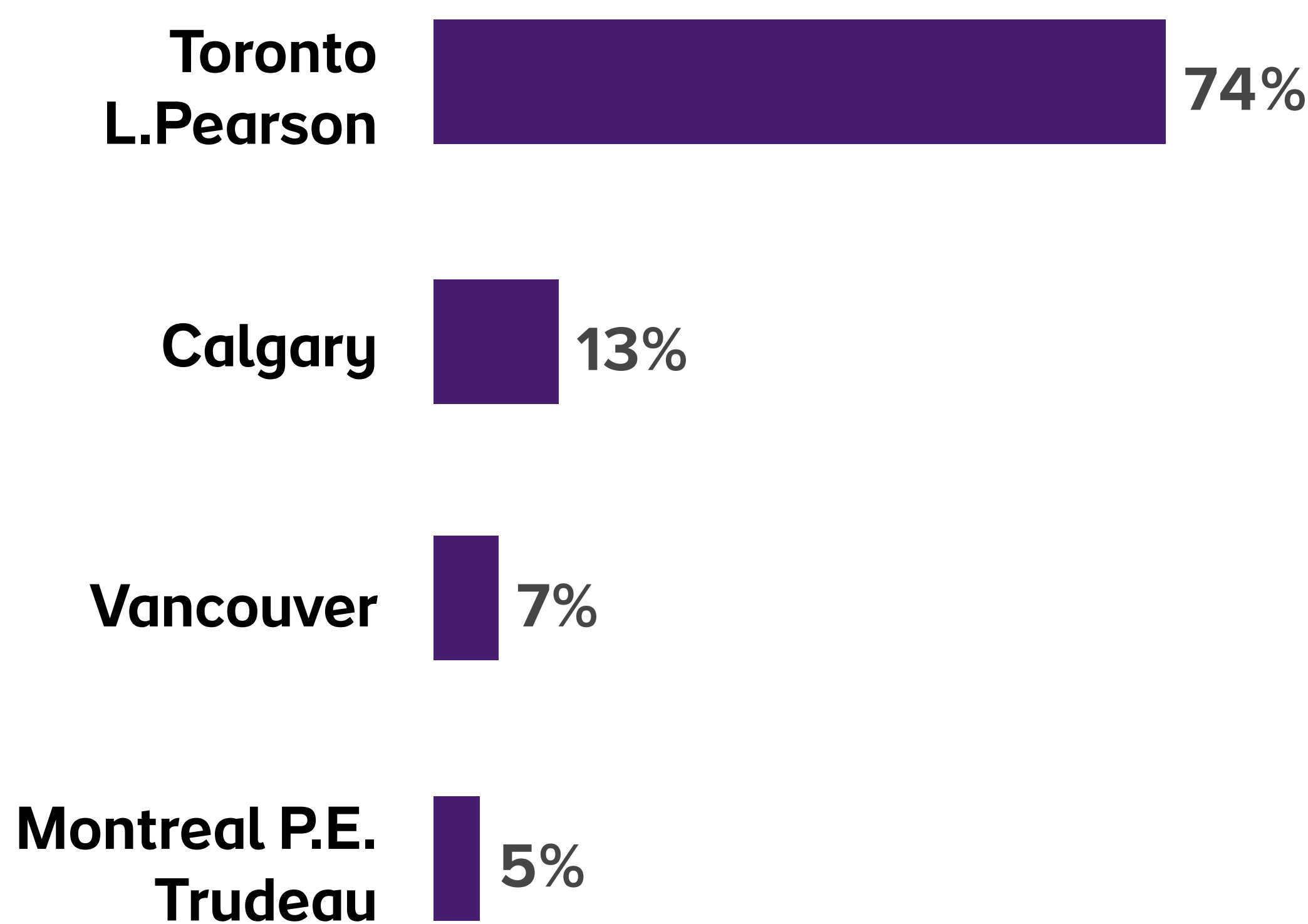
There were over 281,000 million direct one-way air seats available on just over 1,000 flights from Canada to the island of Ireland in 2023. There were four gateways from Canada to one airport on the island of Ireland.



### WHERE CAN OUR TOURISTS FLY FROM?

Toronto L. Pearson Airport accounted for the vast majority (74%) of seats in 2023.

Share of seats by airport



### WHO CAN OUR TOURISTS FLY WITH?

Four carriers operated between Canada and the island of Ireland. In 2023, Air Canada (45%) and Aer Lingus (32%) were responsible for delivering over three-quarters (77%) of seats to the island of Ireland.

Share of seats by carrier

