

CANADA

MARKET PROFILE

2024



INBOUND TOURISTS

The island of Ireland welcomed around 216,000 Canadian tourists who spent almost €344/£299 million and stayed 2.3 million nights in 2024. Canada was the island's fifth-largest source of overseas revenue, seventh-largest source of nights and the eighth-largest source of tourists.



WHERE DID OUR TOURISTS COME FROM?

Three-fifths (62%) of Canadian tourists came from Ontario while a further 16% came from British Columbia.



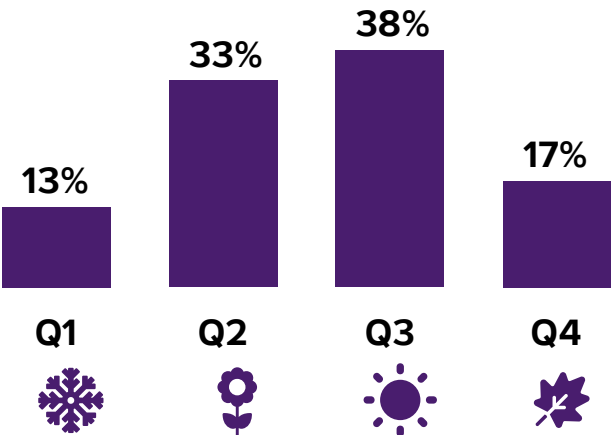
WHERE DID OUR TOURISTS VISIT?



*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 (71%) 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	€237/£206m	69%	133k	62%	1,140k	49%
	VFR	€55/£48m	16%	63k	29%	758k	33%
	BUSINESS	€22/£19m	6%	13k	6%	139k	6%
	OTHER	€30/£26m	9%	13k	6%	289k	12%


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

On average, Canadian tourists spent €1,594/£1,387 per trip or €148/£129 per night and stayed 10.8 nights on the island of Ireland.




€1,594/£1,387 (IOI)
£421 (NI)

Av. spend per trip



€148/£129 (IOI)
£75 (NI)

Av. spend per night









10.8 (IOI)
5.6 (NI)

Av. stay (nights)

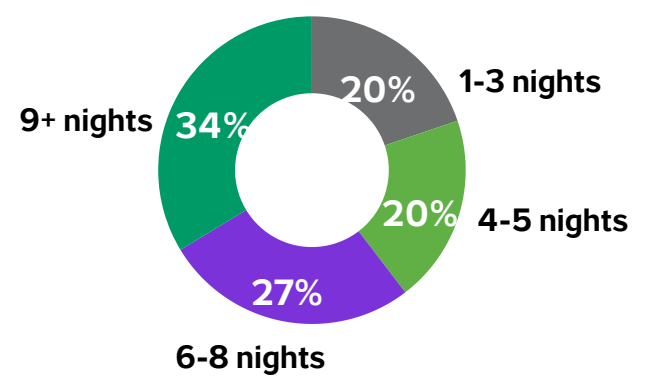
HOW DID OUR TOURISTS SPEND THEIR MONEY?

Three-eighths (37%) of Canadian tourists' revenue was spent on food and drink. A similar share (35%) was spent on accommodation.

Food & Drink	Accomm.	Transport
		
37%	35%	11%
Entertainment	Shopping	Misc.
		
9%	8%	0%

HOW LONG DID OUR TOURISTS STAY?

Four-fifths (80%) stayed four or more nights on the island of Ireland.



INBOUND TOURISTS AND HOLIDAYMAKERS

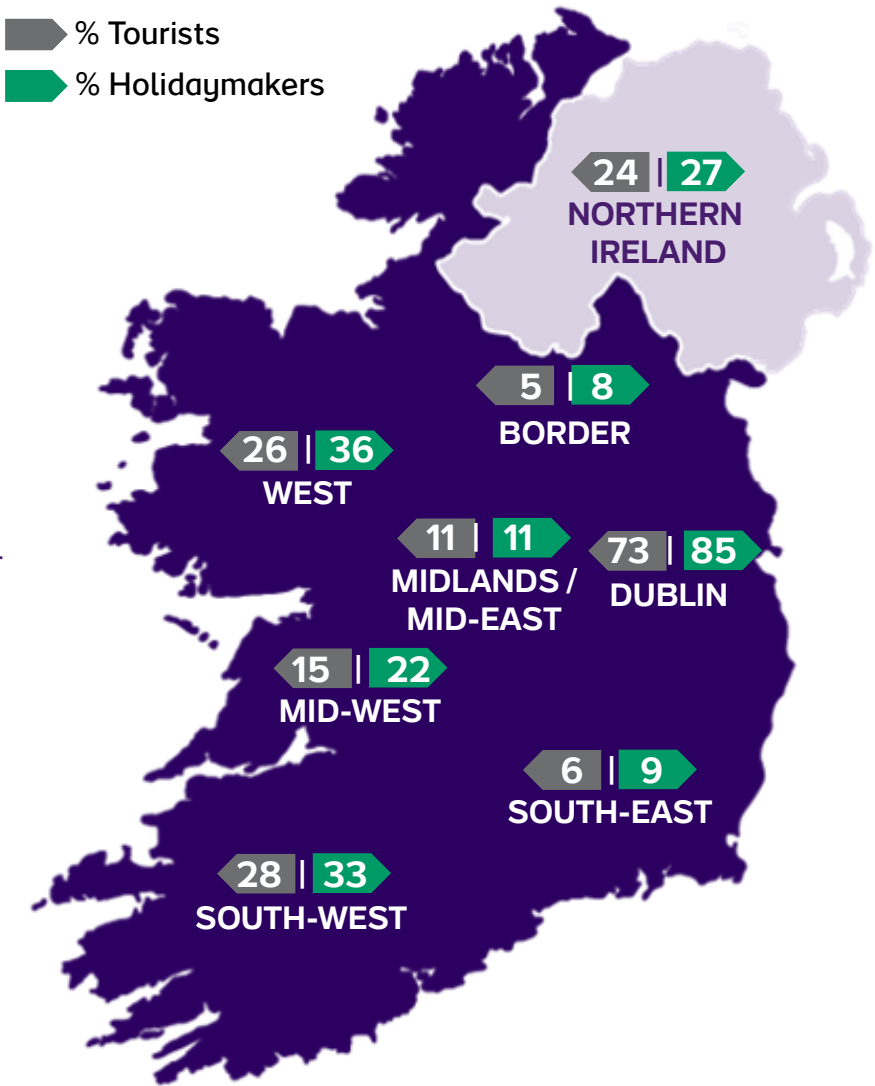
WHAT AREAS DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin, the South West and the West were the most popular regions for both Canadian tourists and holidaymakers, though the order varied—with holidaymakers favouring the West over the South-West.

One-in-five (18%) of Canadian tourists and one-in-four (21%) of holidaymakers overnighted on both sides of the border.

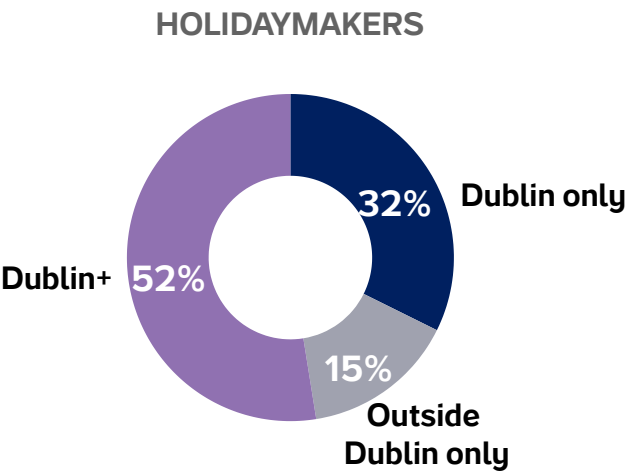
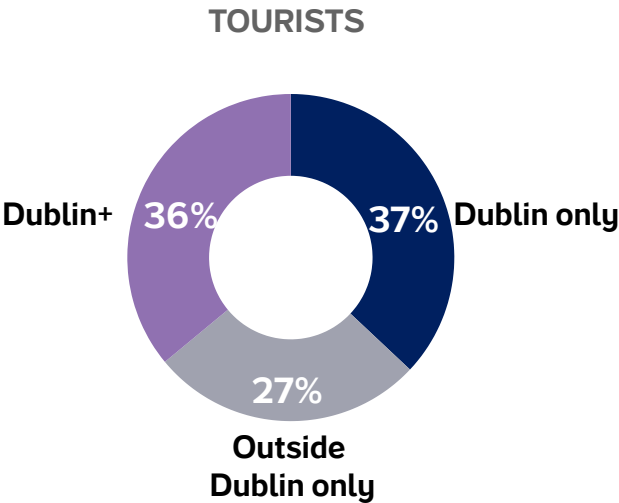
Rank	Tourists	Holidaymakers
#1	Dublin	Dublin
#2	South-West	West
#3	West	South-West

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



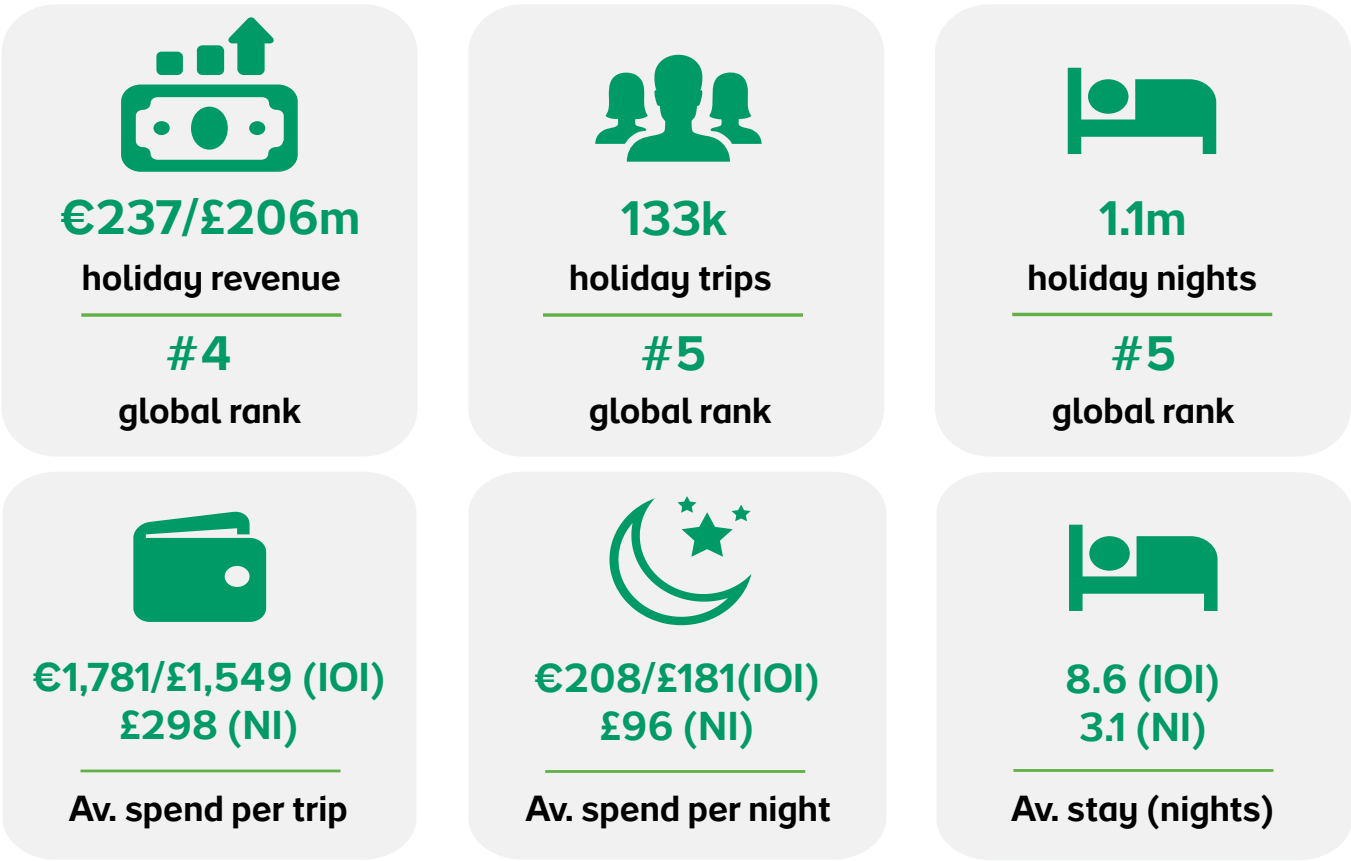
WHERE DID OUR TOURISTS AND HOLIDAYMAKERS VISIT?

Dublin was a must-visit for the majority of Canadian tourists (73%) and holidaymakers (85%).



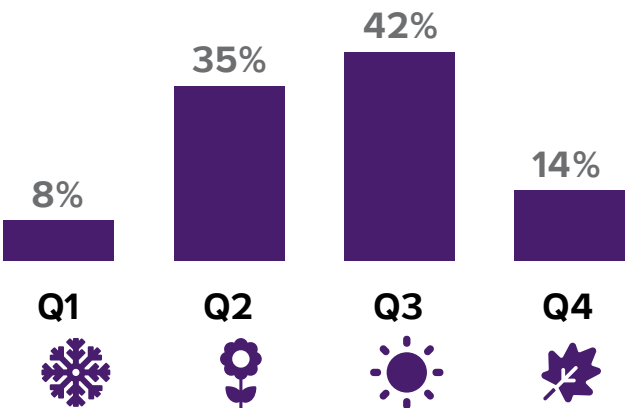
INBOUND HOLIDAYMAKERS

Canada was the island of Ireland’s fourth-largest source of holiday revenue, and the fifth-largest source of holidaymakers and holiday nights. Canadian holidaymakers spend on average €208/£181 per night.



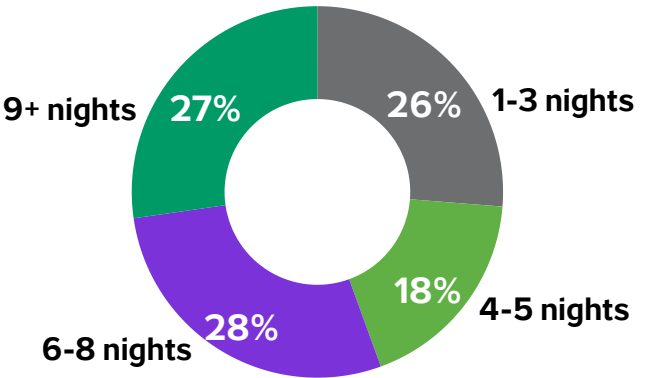
WHEN DID OUR HOLIDAYMAKERS VISIT?

Three-quarters (77%) visited the island of Ireland during Q2 and Q3 (April - September).



HOW LONG DID OUR HOLIDAYMAKERS STAY?

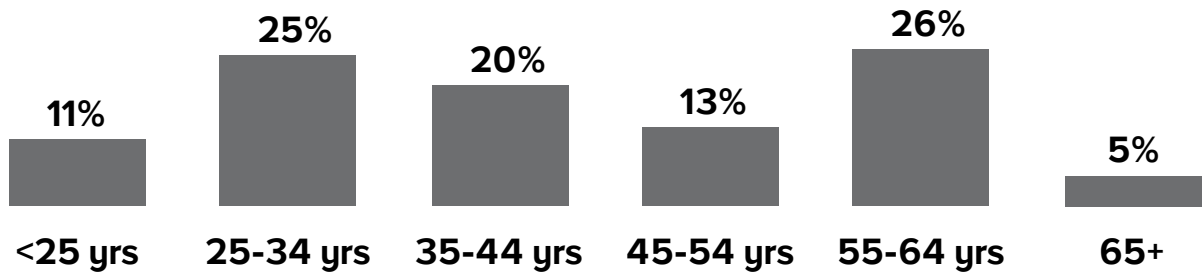
The majority (74%) of Canadian holidaymakers stayed four or more nights on the island of Ireland.



INBOUND HOLIDAYMAKERS

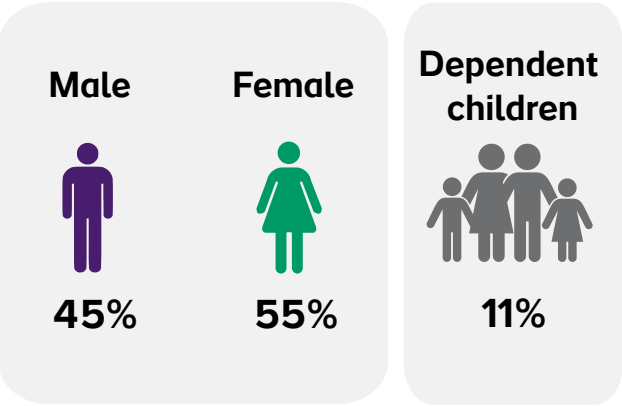
WHAT AGE WERE OUR HOLIDAYMAKERS?

One-quarter (26%) of Canadian holidaymakers were 55-64 years of age.



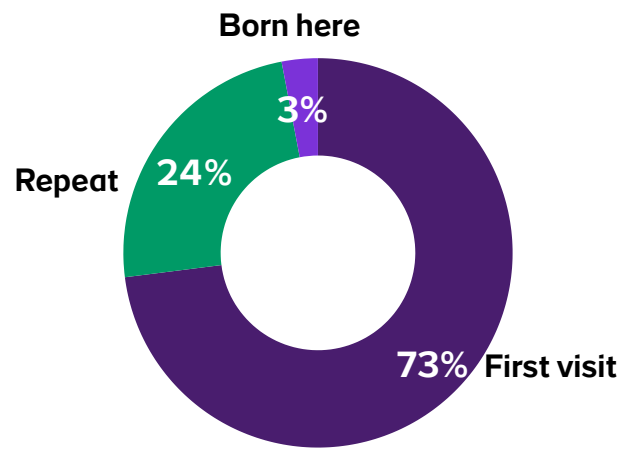
HOLIDAYMAKER GENDER AND DEPENDENT CHILDREN

Over half (55%) of Canadian holidaymakers were female. A minority (11%) of Canadian holidaymakers had children in the household.



HAD OUR HOLIDAYMAKERS BEEN HERE BEFORE?

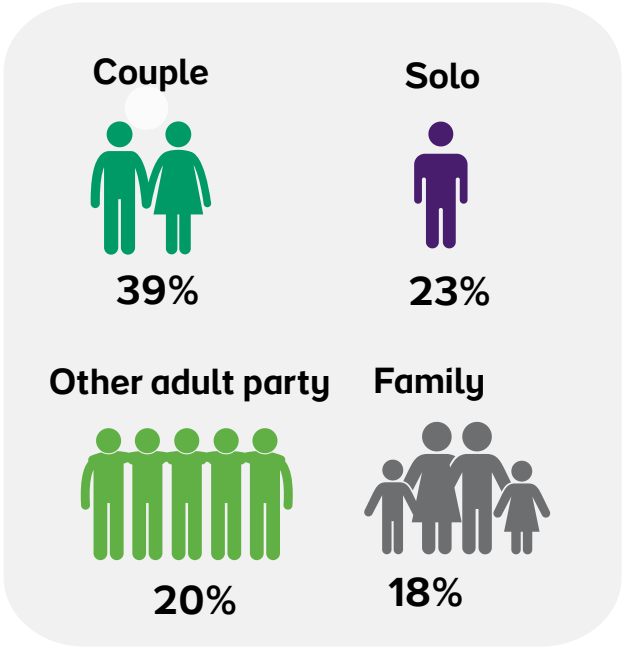
It was a first visit for three-quarters (73%) of Canadian holidaymakers.



WHO DID OUR HOLIDAYMAKERS TRAVEL WITH?

Two-fifths (39%) of Canadian holidaymakers travelled with their spouse/partner.

A quarter (23%) travelled alone and a further one-fifth travelled with an "other adult party".



INBOUND HOLIDAYMAKERS

WHERE DID OUR HOLIDAYMAKERS STAY?

The majority (54%) of nights stayed by Canadian holidaymakers were spent in hotels and around one-in-five (22%) nights were spent in B&Bs or guesthouses.



54%
of nights in
hotels



22%
of nights in
B&Bs or
guesthouses



7%
of nights
with friends
or family



6%
of nights in
rented
accomm.



6%
of nights in
hostels



5%
of nights in
a holiday
home



1%
of nights in
other
accomm.

HOW DID OUR HOLIDAYMAKERS TRAVEL AND GET AROUND?

The majority (92%) of Canadian holidaymakers travelled independently and almost half (46%) used a car while on the island of Ireland.



92%
Travelled
independently



8%
Travelled as
part of a
package

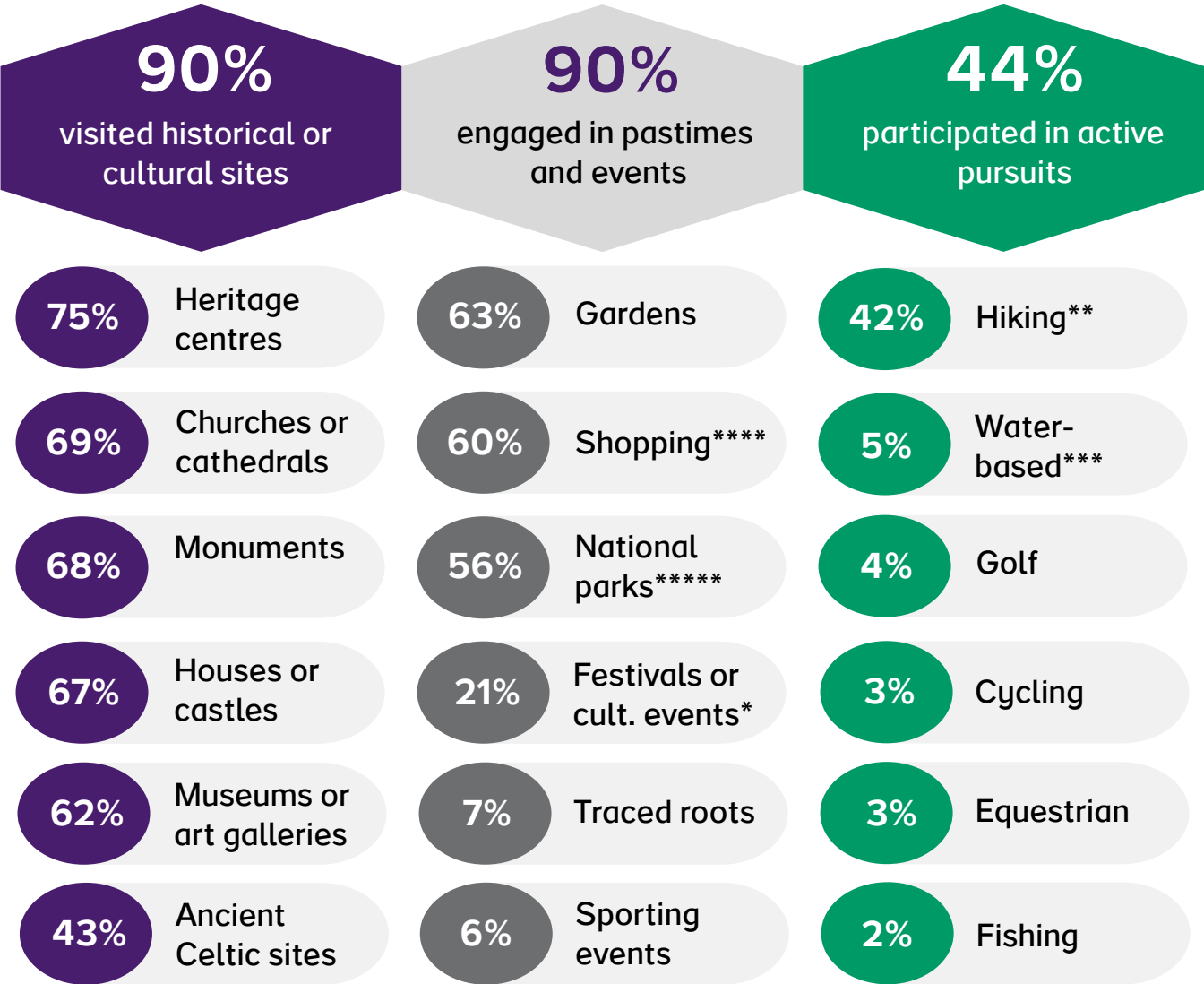


46%
Used a car
44% Rented
2% Borrowed/Other

INBOUND HOLIDAYMAKERS

WHAT WERE OUR HOLIDAYMAKERS' INTERESTS AND ACTIVITIES?

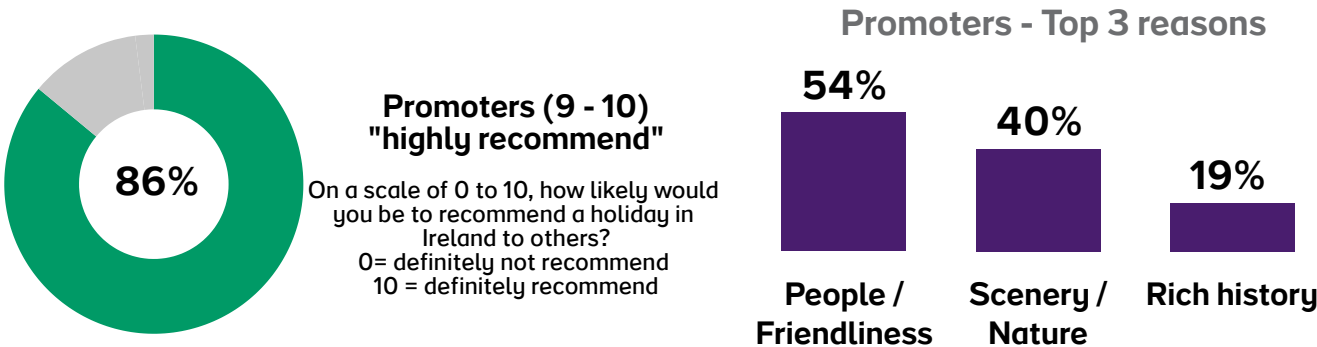
Canadian holidaymakers are active tourists. They explored our historical sites and engaged in multiple events and activities while on the island of Ireland.



*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 (86%) of Canadian holidaymakers would recommend a holiday in Ireland to others. The main reasons given are the friendly people (54%), the scenery and nature (40%) and the rich history (19%).

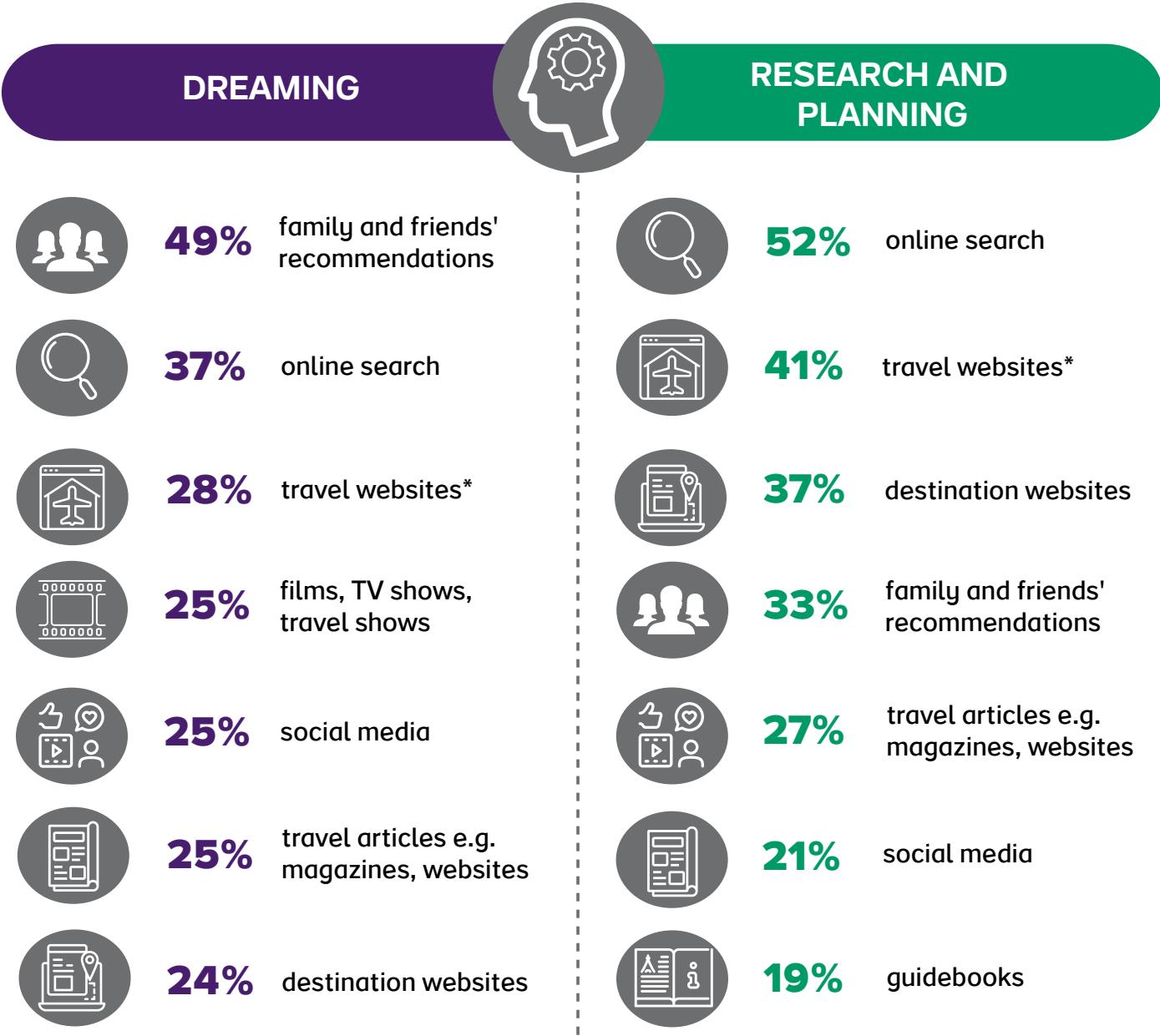
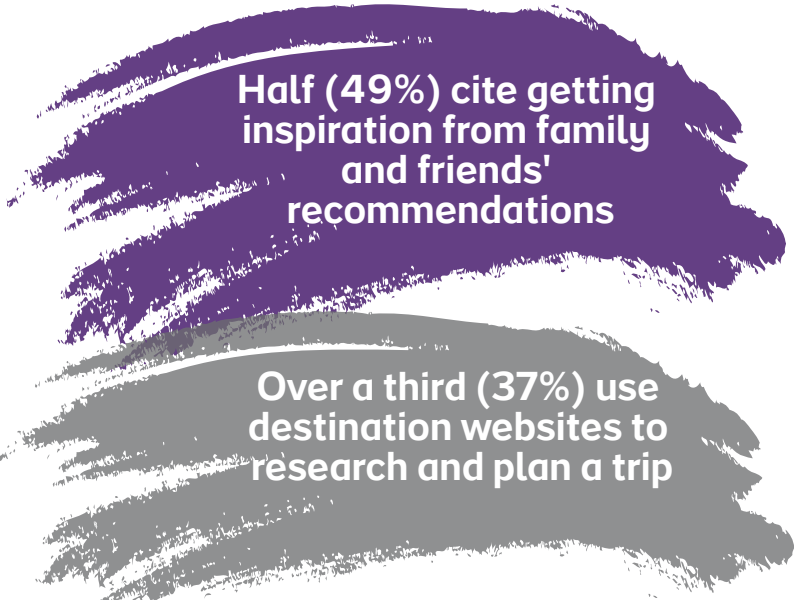


OUTBOUND HOLIDAYMAKERS

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.

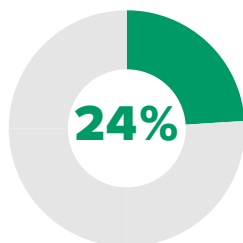
While social media, for example, is cited in its own right, it's often also a channel for the discovery of travel articles and recommendations.



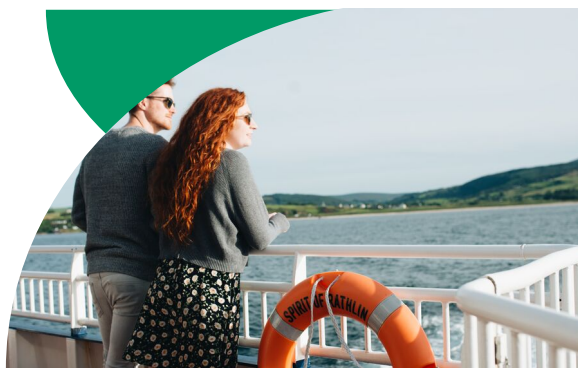
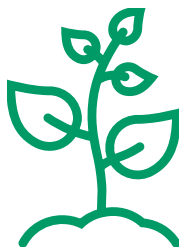
*Travel websites include company websites and booking platforms

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

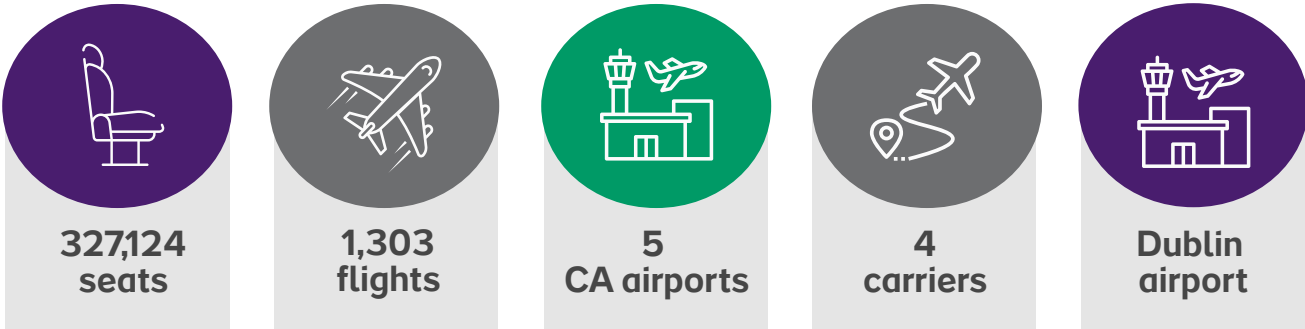
- | | | | | | |
|---|---|--|----|---|---|
| 1 |  | To feel connected to nature | 6 |  | To experience living like a local |
| 2 |  | To broaden and stimulate my mind | 7 |  | To enjoy authentic moments with friendly locals |
| 3 |  | To feel the character of the place and people | 8 |  | To be transported back in history |
| 4 |  | To appreciate historical/modern architecture | 9 |  | To discover and explore somewhere new |
| 5 |  | To experience the vibrancy of the place and people | 10 |  | To enjoy the beauty of the landscape |

OUTBOUND TOURISTS

Canada was the world's eighth-largest outbound market in 2024 and 19% of all outbound trips from Canada were to Europe.

ACCESS BY AIR

There were over 327,000 million direct one-way air seats available on just over 1,000 flights from Canada to the island of Ireland in 2024. There were five gateways from Canada to one airport on the island of Ireland.



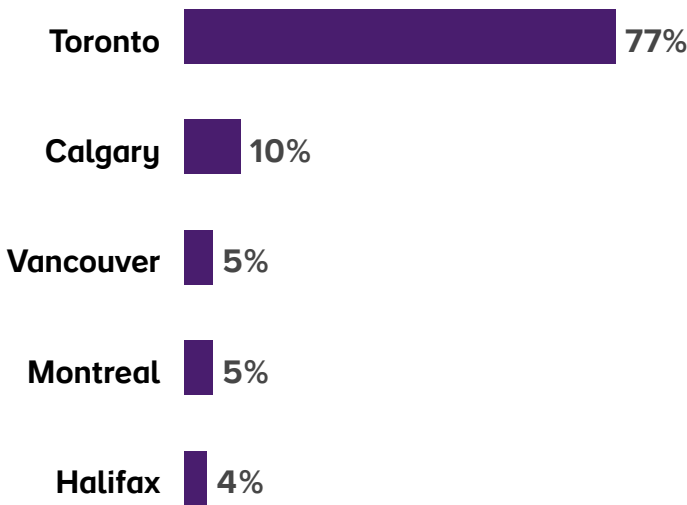
WHERE CAN OUR TOURISTS FLY FROM?

Toronto L. Pearson Airport accounted for the vast majority (77%) of seats in 2024.

WHO CAN OUR TOURISTS FLY WITH?

Four carriers operated between Canada and the island of Ireland. In 2023, Air Canada (38%) and Aer Lingus (28%) were responsible for delivering over two-thirds (66%) of seats to the island of Ireland.

Share of seats by airport



Share of seats by carrier

