

INTERNATIONAL MARKET PROFILE

INDIA



Market Overview

India is one of the world's fastest growing outbound travel markets, with the United Nations World Tourism Organisation predicting 50 million outbound travellers by 2020.

Currently almost most half of all Indian visitors to South Australia are here on a Visiting Friends and Relatives purpose trip, making it the most dominant purpose of visitation.

Long stays with few stopovers characterise an average Indian Visiting Friends and Relatives trip to Australia.

The Indian Leisure Tourist market is still only small but growing quickly.

Australia is considered a 'highly aspirational' destination with natural landscapes and wildlife, with a wide range of experiences appealing to families having the most appeal.

Air Access

Airlines that provide access to Adelaide via one stop over include Singapore Airlines, Malaysia Airlines, Cathay Pacific and Emirates.

Key Themes

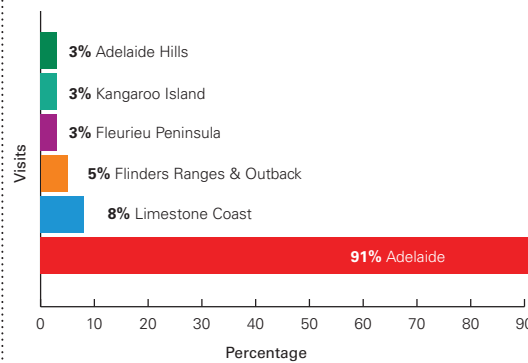
Food and wine; nature and wildlife; coastal; city experiences; shopping; journeys

Fast Facts and Figures

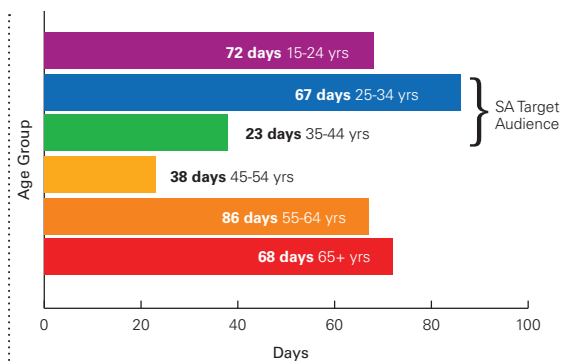
Data is based on a 3 year average for the years ending June 2012 to June 2014 for all purpose visitors.

| INDIA | | | | | |
|---------------------------------|---------|---------|----------|---------|---------------------|
| South Australia | Holiday | VFR | Business | Other | Total |
| Visits | 2,000 | 5,000 | 1,000 | 2,000 | 9,000 |
| Nights | 21,000 | 391,000 | 12,000 | 151,000 | 575,000 |
| Average Length of Stay (nights) | 11 | 78 | 12 | 76 | 64 |
| Expenditure | | | | | \$17,000,000 |

Key South Australian Overnight Destinations



Length of stay in South Australia by age group

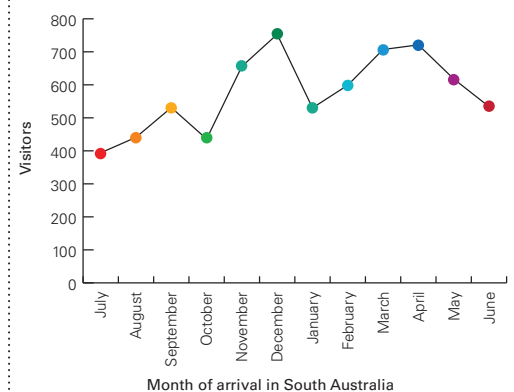


Appealing Experiences

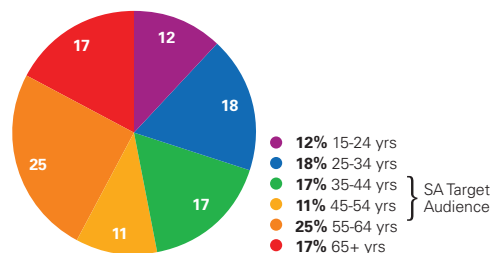
- Adelaide acts as the hub, with strong overnight visitation.
- Kangaroo Island's diverse and abundant wildlife for first time visitors.
- South Australia is a perfect self-drive destination as indicated through visitation on the Limestone Coast as part of the Southern Ocean Drive (Melbourne to Adelaide).

Average length of stay is influenced by longer staying education and VFR sectors.

Seasonality



Visitor Age Profile



Target Market Profile

Midlife travellers or Families aged between 35 and 54 with a household income greater than 2.7m Rupee (\$50,000), in the affluent middle class, from Delhi or Mumbai, who have prior experience of Australia, travelling as a couple or with their family.

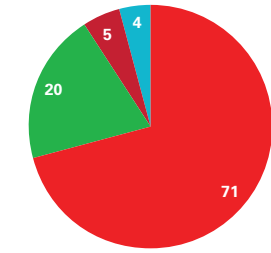


Key Distribution Partners

| Key Distribution Partners |
|---------------------------|
| SOTC Kuoni |
| Cox & Kings |
| Thomas Cook India |
| Ottila International |
| JTB Travels |
| Mercury Travels |

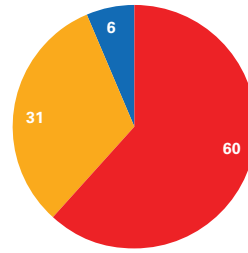
| Top Travel Websites |
|---------------------|
| MakeMyTrip |
| Yatra Online |
| TripAdvisor |
| Ezeego1 |
| Expedia |

The Inbound Tour Operators servicing the market are the recommended first point of contact.



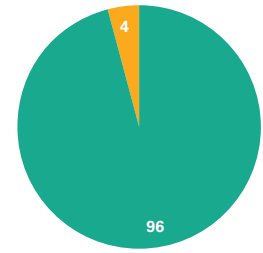
Accommodation used (visitor nights)

- 71% Home of friend/relative
- 20% Rented house/apartment/unit/flat
- 5% Other
- 4% Hotel/resort/motel/motor inn



Travel party description

- 60% Unaccompanied
- 31% Adult couple
- 6% Family Group



Package Tours

- 96% Non Package Tour
- 4% Package Tour

This data includes Education and VFR purpose sectors.

Market Insights

- Due to sheer scale of the Indian market, the South Australian Tourism Commission (SATC) aims to drive demand through social media strategies, international media hosting and leveraging relationships with Tourism Australia. The SATC will target Mumbai and Delhi.
- Indians living in Australia are a large pool of influencers whose impact on itinerary planning should not be underestimated.
- The Indian travel trade is highly fragmented and differs between regional areas, so extremely challenging to target.
- The SATC's partner activities are limited to annual trade show engagement and working with a key airline partners.
- Offer discounts or value-add options on products, such as: kids stay/eat free, family packages, bundling attractions together, complimentary upgrades, free WiFi, food included in the cost, stay 3 nights pay 2 nights, offering room discounts across multiple cities etc.
- Be prepared to offer rates to Indian buyers at key trade events such as the Australian Tourism Exchange (ATE), Tourism Australia's India Travel Mission, Dreamtime, and State/Territory hosted travel trade missions. Communicate rates to agents at least three to four months before the commencement of the travel season, i.e. by November or December for travel during April to June.
- It is likely within a group of Indians there will be a variety of dietary requests. Many Indians are vegetarian and there are many different types of vegetarianism common in India. Hot meals are always preferred.
- Indians often prefer to eat late dinners.
- India has many festivals throughout the year and recognising an important religious festival will be appreciated by travellers.
- Provide clear and visible information on the location and opening/closing hours of nearby key shopping areas. This includes the locations of discount/outlet shops and centres if nearby.

Social Media

Facebook: www.facebook.com/indialovessouthaustralia

Contacts

Marketing

Sibil Jhaveri, Manager Publicity and Public Relations, Adelaide
sibil.jhaveri@sa.gov.au

Inbound Distribution

Marc Leopold
 Business Manager Inbound Distribution
marc.leopold@sa.gov.au

Source: International Visitor Survey, Tourism Research Australia, Canberra | Department of Immigration and Citizenship (DIAC) | VFR = Visiting Friends and Relatives
 Definition of Package Tour: Where the international airfares plus some other travel component (transport, accommodation, tour) are paid for before arrival in Australia.

Disclaimer: This summary has been prepared by the South Australian Tourism Commission (SATC) in good faith. While every care has been taken in preparing the information, the SATC does not represent or warrant that it is correct, complete or suitable for the purposes for which you wish to use it. By using this information you acknowledge that it is provided by SATC without any responsibility on behalf of the SATC and agree to release and indemnify the SATC for any loss or damage that you or any third party may suffer as a result of your reliance on this information.