

# 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 over half of all Indian visitors to South Australia are here on a Visiting Friends and Relatives (VFR) purpose trip, making it the most dominant purpose of visitation.
- ▶ Long stays with a few stopovers characterise an average India VFR trip to Australia.
- ▶ The Indian leisure travel market is still only small but growing quickly.
- ▶ South Australia is often part of a multi-state itinerary proposition for the Indian market.
- ▶ Generally, when Indians visit Australia for holidays they like to visit as many states as possible.
- ▶ Australia is considered a 'highly aspirational' destination with natural landscapes and wildlife, with a wide range of experiences appealing to families and couples.

### FAST FACTS & FIGURES

Data is based on a 3 year annual average for the years ending Dec 2016 – Dec 2018 for all purpose visitors.

INDIA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	2,000	8,000	2,000	2,000	12,000
Visits (AUS)	90,000	168,000	38,000	53,000	289,000
Nights (SA)	13,000	399,000	34,000	144,000	592,000
Nights (AUS)	873,000	9,742,000	820,000	5,666,000	17,101,000
ALOS - Nights (SA)	7	50	17	72	49
ALOS - Nights (AUS)	10	58	22	107	59
<b>EXPENDITURE</b>					<b>\$31,000,000</b>

### APPEALING EXPERIENCES

- ▶ Adelaide for safety, ease of getting around, vibrant bar and restaurant scene, abundance of local produce and shopping precincts.
- ▶ Adelaide Oval and cricket experiences including RoofClimb.
- ▶ Kangaroo Island's diverse and abundant wildlife.
- ▶ Self-drive journeys including the Southern Ocean Drive (Adelaide to Melbourne touring route including the Limestone Coast).
- ▶ Food and wine regions of Adelaide and surrounds such as the Barossa, Adelaide Hills and McLaren Vale (Fleurieu Peninsula).

### TARGET MARKET PROFILE

- ▶ South Australia targets the 'high value traveller' including families and honeymooners in the affluent middle class from key cities including Delhi, Mumbai and Bangalore.

### AIR ACCESS

- ▶ Airlines which provide access to Adelaide with one stopover include Singapore Airlines, Malaysia Airlines, Cathay Pacific, Emirates and China Southern Airlines.

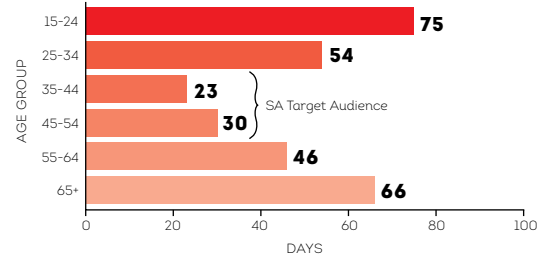
### KEY THEMES

- ▶ Coastal & aquatic
- ▶ Nature & wildlife
- ▶ Food & wine
- ▶ Shopping

### KEY SOUTH AUSTRALIAN OVERNIGHT DESTINATIONS

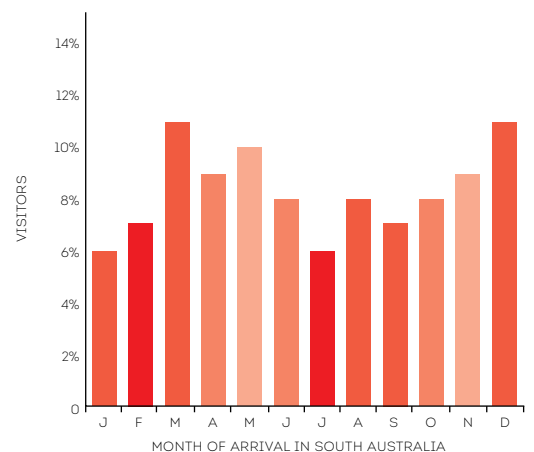


### LENGTH OF STAY IN SOUTH AUSTRALIA BY AGE GROUP



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

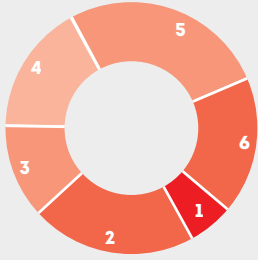
### SEASONALITY



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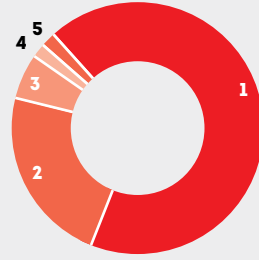
## INDIA

### VISITOR AGE PROFILE



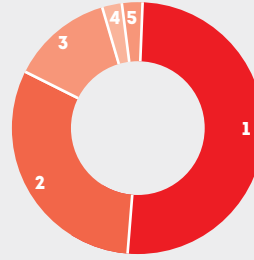
- 1 15-24 **6%**
- 2 25-34 **21%**
- 3 35-44 **12%**
- 4 45-54 **17%**
- 5 55-64 **27%**
- 6 65+ **18%**

### ACCOMMODATION USED



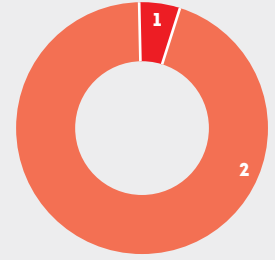
- 1 Home of friend/relative **68%**
- 2 Rented house/apartment/unit/flat **23%**
- 3 Hotel/resort/motel/motor inn **6%**
- 4 Other **2%**
- 5 Other non-commercial property **2%**

### TRAVEL PARTY DESCRIPTIONS



- 1 Unaccompanied **52%**
- 2 Adult couple **31%**
- 3 Family group **13%**
- 4 With friends/relatives travelling together **2%**
- 5 Business **2%**

### PACKAGE TOURS



- 1 Package tour **6%**
- 2 Non-package tour **94%**

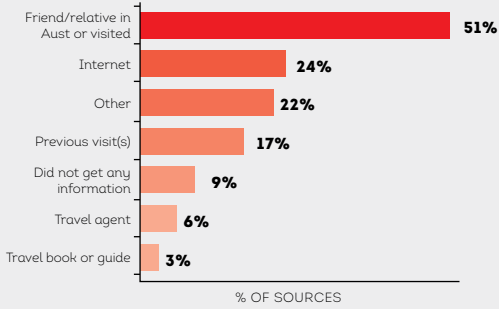
### MARKET INSIGHTS

- ▶ First time leisure visitors to Australia generally want to join group tour packages that visit as many states and destinations as possible. Therefore, trade partners are extremely important for delivering arrivals to South Australia.
- ▶ Indians living in Australia are a large pool of influencers whose impact on itinerary planning should not be underestimated.
- ▶ Indian travellers are extremely value conscious. 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.
- ▶ 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.
- ▶ 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. Halal is another dietary requirement among Indian travellers to be mindful of.
- ▶ Indians often prefer to eat late dinners. Hot meals are always preferred.
- ▶ 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.
- ▶ Indian travellers must apply for a Visitor Visa, which can take up to two months to process.

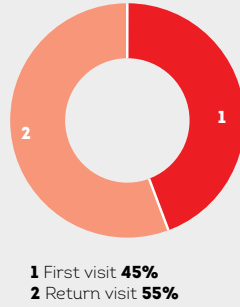


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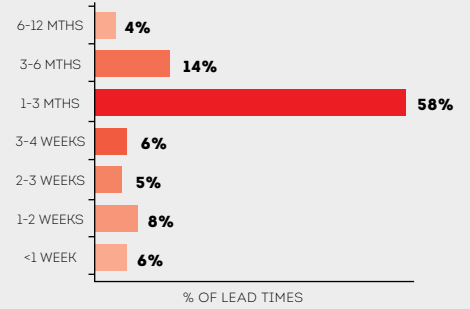
## INFORMATION SOURCES



## FIRST OR RETURN VISIT



## BOOKING LEAD TIMES



## KEY DISTRIBUTION PARTNERS

- THOMAS COOK

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- SOTC

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- MAKEMYTRIP.COM

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- MERCURY TRAVEL

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- FCM TRAVEL SOLUTIONS / FLIGHT SHOP

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- OTTLA

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- COX & KINGS

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- VEENA WORLD

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- YATRA.COM

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## TOP TRAVEL WEBSITES

- MAKEMYTRIP.COM
- TRIPADVISOR.IN
- GOIBIBO.COM
- CLEARTRIP.COM
- BOOKING.COM
- YATRA.COM
- JETAIRWAYS.COM
- HOLIDAYIQ.COM
- AIRINDIA.COM

## SOCIAL MEDIA

 Find our Facebook page at [SeeSouthAustralia](https://www.facebook.com/SeeSouthAustralia)

## CONTACTS

### MARKETING

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### DISTRIBUTION

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Source: International Visitor Survey Dec 16, Dec 17 & Dec 18 conducted by Tourism Research Australia. Unless otherwise stated, all data refers to the Annual Average results for the 3 years from Dec 2016 to Dec 2018. Totals may not add to 100% due to rounding. np = not published due to small sample size. VFR = Visiting Friends and Relatives, ALOS = Average Length Of Stay (Nights). 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. Produced by the South Australian Tourism Commission April 2019.