REMARKABLE ROCKS
KANGAROO ISLAND

2024 INTERNATIONAL MARKET UPDATE

INDIA

MARKET OVERVIEW

Results based on year ending June 2024

- India is South Australia's fifth largest inbound market with visitor expenditure up by 93% and visitation up by 7% compared to pre-Covid.
- Currently 65% 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.
- The Indian holiday travel market is still only small but growing quickly.
- Long stays with a few stopovers characterise an average India VFR trip to Australia.
- Key demand driving experiences include nature and wildlife, shopping, coastal and aquatic, food and wine.
- Australia is considered a 'highly aspirational' destination with natural landscapes and wildlife, with a wide range of experiences appealing to families and couples.
- As cricket is the most popular sport in India, Indians have a strong awareness of Adelaide Oval, which provides a basic reference point.
- 65% of Indian visitors to South Australia have been to Australia before.

SNAPSHOT OF CURRENT STATISTICS

Results based on year ending June 2024

VISITORS

31k

NIGHTS

2m#

EXPENDITURE

$113m

AVERAGE SPEND

$54 PER NIGHT

$3,673# PER VISITOR

AVERAGE LENGTH OF STAY

68 nights#

#A high average due to VFR.

INTERNATIONAL RANKING IN SOUTH AUSTRALIA

#5 FOR VISITORS

#2 FOR NIGHTS

#2 FOR EXPENDITURE

AIR ACCESS

INDIA

Key Connecting Airlines

Qantas Airways (QF)

Singapore Airlines (SQ)

Malaysia Airlines (MH)

Qatar Airways (QR)

Emirates (EK)

Multiple airlines offering connections via other Australian Airports

FAST FACTS & FIGURES

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

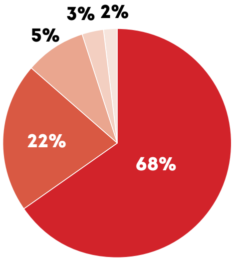
INDIA	HOLIDAY	VFR	BUSINESS	OTHER	TOTAL
Visits (SA)	4	11	1	2	18
Visits (AUS)	101	195	44	58	332
Nights (SA)	24	447	29	177	677
Nights (AUS)	1,015	10,735	998	6,520	19,268
ALOS - Nights (SA)	6	41	29	89	38
ALOS - Nights (AUS)	10	55	23	112	58
Expenditure					**$41M**

(000's)

ALOS = Average Length Of Stay. VFR = Visiting Friends and Relatives.

VISITOR ACCOMMODATION TYPE & TRAVEL PARTY DESCRIPTIONS

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

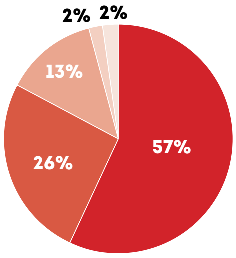


Visitor accommodation type (in SA)

- Friends or relatives property
- Rented house/apartment/flat or unit
- Hotels and similar accommodation
- Edudcation institution (university/school dormitory or college)
- Other

Travel party description (to SA)

- Unaccompanied
- Adult couple
- Family group
- Friends/relatives travelling together
- Business



VISITOR DISPERSAL†

Annual average of 2017-2019 figures - current year samples not yet sizeable enough

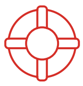
22%
REGIONAL SOUTH AUSTRALIA

Adelaide Hills	8%
Barossa	15%
Clare Valley	2%
Eyre Peninsula	4%
Fleurieu Peninsula	4%
Flinders Ranges & Outback	27%
Kangaroo Island	9%
Limestone Coast	20%
Murray River, Lakes & Coorong	6%
Riverland	2%
Yorke Peninsula	3%

†Data includes visitors who travelled to multiple regions

IMPORTANCE FACTORS

Data from Consumer Demand Project (CDP) report - August 2023

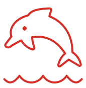


44%
Safety and security
VS. **53%** GLOBAL AGGREGATE

40%
World class beauty and nature
VS. **40%** GLOBAL AGGREGATE

30%
Value for money
VS. **37%** GLOBAL AGGREGATE

30%
Family friendly
VS. **26%** GLOBAL AGGREGATE



28%
World-class aquatic and coastal
VS. **37%** GLOBAL AGGREGATE

GLOBAL AGGREGATE: This is from the Consumer Demand Project research conducted quarterly by Tourism Australia in 12 key international markets for Australia. Global aggregate refers to the average across all these markets.

MARKET INSIGHTS

- Indians living in Australia are highly influential, and their impact on itinerary planning should not be underestimated.
- Indian travellers can be value conscious. Some examples of value add options are discounts on products, such as: kids stay/eat free, family packages, bundling attractions together, complimentary upgrades, food included in the cost, stay 3 nights pay 2 nights, offering room discounts across multiple cities etc.
- Developing relationships with key trade at events such as the Australian Tourism Exchange (ATE), Tourism Australia's Marketplace, G'Day Australia and other trade events and missions is critical for business success. Invest the time and be remembered.
- 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 some 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.
- Most travellers from India are now granted a three year visa, which allows multiple entries. This creates an excellent opportunity to capture repeat visitation and wider dispersal.

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.

BOOKING PREFERENCES

Data from Consumer Demand Project (CDP) report - March 2024

59%	37%	35%	27%	12%	1%
Online Travel Agent (e.g. Expedia)	Retail Travel Agent/ Tour Operator	Direct with Airline	Direct with Accommodation	Direct with Experienced Provider	Other

TOP 3 BARRIERS TO VISITING AUSTRALIA

Data from Consumer Demand Project (CDP) report - August 2023

High cost of travelling around

Other places I would prefer to go

Expensive airfares

INDIA CHECKLIST

Consider the following points when targeting travellers from India:

- **As a strong VFR market**, the local Indian community can have a huge influence on the travel plans of their visitors. Targeting this market first could provide an efficient entry point into the market.
- If food is part of your offering, note that many Indians are vegetarian and even non-vegetarians will often only eat some meats. They prefer hot meals and generally eat late. **Checking (and double checking) dietary requests and preferences** is strongly recommended.
- **The Inbound Tour Operators who service the market are a critical link** in the chain and collectively service thousands of agents across India. Engaging them as a first step is important to target the holiday segment.
- Indian visitors rarely visit one state and they're likely to be **combining South Australia with at least one or two more states**. They are limited on time so make it clear why they must include your product in their itinerary. Be uniquely South Australian.
- **Be prepared for buyers to want to negotiate on the rate**. This is a normal course of doing business in the market.

KEY TRADE PARTNERS

INBOUND TOUR OPERATORS

The Inbound Tour Operators who service the market highly influence product selection. They often have offices both in Australia and India and service the trade right across the market. Any operators interested in the market should be engaging with the inbound Tour Operators as a first step. Below is a list of some of the key ones but this grows and changes regularly.

- Australia & Beyond Holidays
- AOT Inbound
- Australia & Worldwide Travels
- ATM
- Pacific Vacations Australia
- Travel Maestro Inbound
- Turtle Down Under
- Xplore Australia

IN-MARKET KEY DISTRIBUTION PARTNERS

As defined by Tourism Australia, the Key Distribution Partners are as per below. Whilst this is a useful reference point, it is important to note that the Indian travel trade is characterised by hundreds of small agents – too many to name in this document – each who have the ability to send small numbers to Australia. It is these smaller agents who may have more appetite to put forward itineraries to Australia that go beyond the East Coast cities.

- Flamingo Travels
- Kesari Tours
- Kulin Kumar Holidays
- Makemytrip.com
- Pickyourtrail.com
- SOTC
- Thomas Cook India Ltd
- Veena World

ONLINE TRAVEL AGENTS

make my trip

pickyourtrail

Booking.com

yatra

Tripadvisor

cleartrip

klook*

*Currently small but growing market presence

CONTACT

ADELAIDE

Martin Kaesler
Manager, Global Markets
martin.kaesler@sa.gov.au

SOUTH AUSTRALIA

Government of South Australia
South Australian Tourism Commission

Disclaimer: Source: International Visitor Survey Dec 2017, Dec 2018, Dec 2019, and June 2024 conducted by Tourism Research Australia, Consumer Demand Project (CDP) Aug 2023 and 2024. Totals may not add to 100% due to rounding. VFR = Visiting Friends and Relatives. ALOS = Average Length of Stay (Nights).