**INDIA MARKET SNAPSHOT**

**INDIA MARKET PROFILE**

### INDIA MARKET OVERVIEW

<table>
<thead>
<tr>
<th>POPULATION</th>
<th>GDP PER CAPITA (US $)</th>
<th>ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)</th>
<th>MAJOR CITIES</th>
<th>LANGUAGE(S)</th>
<th>CURRENCY</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.27 billion</td>
<td>1,165</td>
<td>6%</td>
<td>Delhi Mumbai Bangalore Kolkata Chennai</td>
<td>English Hindi</td>
<td>INR</td>
</tr>
</tbody>
</table>

### INDIA OUTBOUND TRAVEL

<table>
<thead>
<tr>
<th>YEAR</th>
<th>NUMBERS</th>
<th>YEAR ON YEAR GROWTH %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2012</td>
<td>15,000,000</td>
<td>6%</td>
</tr>
<tr>
<td>2013</td>
<td>16,630,000</td>
<td>11%</td>
</tr>
<tr>
<td>2014</td>
<td>18,330,000</td>
<td>10.3%</td>
</tr>
<tr>
<td>2015</td>
<td>20,380,000</td>
<td>11.1%</td>
</tr>
</tbody>
</table>

### PURPOSE OF TRAVEL (% SHARE OF VISITS)

<table>
<thead>
<tr>
<th>PURPOSE</th>
<th>Leisure</th>
<th>Business</th>
<th>VFR</th>
<th>Other</th>
</tr>
</thead>
<tbody>
<tr>
<td>% (ESTIMATE)</td>
<td>50%</td>
<td>20%</td>
<td>10%</td>
<td>20%</td>
</tr>
</tbody>
</table>

### TOP 5 DESTINATIONS TO VISIT

**WORLD WIDE**

1. Thailand
2. Singapore
3. Malaysia
4. UAE
5. USA

**EUROPE**

1. United Kingdom
2. Germany
3. Switzerland
4. France
5. Austria

### PEAK TRAVEL PERIODS

<table>
<thead>
<tr>
<th>MONTH</th>
<th>AVERAGE LENGTH OF HOLIDAY</th>
</tr>
</thead>
<tbody>
<tr>
<td>April - June</td>
<td>10 to 15 days</td>
</tr>
<tr>
<td>October – November [Diwali]</td>
<td>10 to 15 days</td>
</tr>
<tr>
<td>December</td>
<td>10 to 15 days</td>
</tr>
</tbody>
</table>

**Diwali Holidays** – Apart from the regular summer holidays from April – June, schools in India are also closed for one of the biggest festivals in India celebrated in either October or November. The dates are selected as part the Hindu calendar and hence the dates differ every year but most likely during the months of October/November.

**International Schools** – International schools are the new genre of schools in India, where students who belong to the HNI section attend. School holidays for these schools differ quite a bit from other Indian schools. School holidays follow the European pattern.
OUTBOUND TRAVEL TO IRELAND

<table>
<thead>
<tr>
<th>MARKET</th>
<th>2013</th>
<th>YoY increase</th>
<th>2014</th>
<th>YoY increase</th>
<th>2015</th>
<th>YoY increase</th>
</tr>
</thead>
<tbody>
<tr>
<td>India</td>
<td>15,000-25,000</td>
<td>4%</td>
<td>16,000-27,000</td>
<td>7.5%</td>
<td>20,000-30,000</td>
<td>16%</td>
</tr>
</tbody>
</table>

Tourism Ireland best estimates

TOURISM IRELAND’S TARGET MARKETS / SEGMENTS

<table>
<thead>
<tr>
<th>NAME</th>
<th>AGE</th>
<th>PROFILE</th>
<th>% OF TOTAL POPULATION</th>
<th>HOW DO THEY BOOK THEIR HOLIDAY?</th>
<th>ACCOMMODATION TYPE WHILE ON HOLIDAYS</th>
<th>HOW DO THEY LIKE TO TRAVEL WITHIN IRELAND?</th>
<th>KEY REQUIREMENTS FROM IRISH INDUSTRY FOR THIS SEGMENT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leisure and MICE Travel</td>
<td>25-55</td>
<td>High net-worth individuals, Self Employed Professionals, CEO, Senior Corporate Executives, Double income households, Empty Nesters</td>
<td>2%</td>
<td>Travel agents, Online</td>
<td>5 star, 4 star, 3 star</td>
<td>Group tours, Self drive, Chauffeur service</td>
<td>Flexibility in pricing as India is a very price sensitive market, Cater for Vegetarians</td>
</tr>
</tbody>
</table>

WEEKLY FLIGHTS & SEATS FROM KEY CITIES IN INDIA TO IRELAND

<table>
<thead>
<tr>
<th>DEPARTURE CITY</th>
<th>NO. OF FLIGHTS PER WEEK</th>
<th>NO. OF SEATS</th>
<th>INDIRECT AIRLINES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mumbai</td>
<td>111</td>
<td>19,980</td>
<td>Air France, British Airways, Emirates, Etihad Airways, Jet Airways, KLM, Lufthansa Airways, Swiss Air, Turkish Airways, Virgin Atlantic</td>
</tr>
<tr>
<td>Delhi</td>
<td>85</td>
<td>15,300</td>
<td>Air France, British Airways, Emirates, Etihad Airways, Jet Airways, KLM, Lufthansa Airways, Swiss Air, Turkish Airways, Virgin Atlantic</td>
</tr>
<tr>
<td>Bangalore</td>
<td>51</td>
<td>9,180</td>
<td>British Airways, Emirates, Etihad Airways, Lufthansa Airways</td>
</tr>
<tr>
<td>Chennai</td>
<td>42</td>
<td>7,560</td>
<td>British Airways, Emirates, Etihad Airways, Lufthansa Airways</td>
</tr>
</tbody>
</table>

VISA REQUIREMENTS

TO REPUBLIC OF IRELAND
- Irish Visa Required

TO NORTHERN IRELAND
- UK Visa Required

British Irish Visa Scheme
- Two Destinations One Visa
  The new British Irish Visa Scheme (BIVS) allows a short stay applicant from India to travel to and around both the UK and Ireland with only one visa. Whether this visa is a UK visa or an Irish visa is dependent on the country you visit first. For more information visit the Irish Naturalisation and Immigration Service (INIS) website (www.inis.gov.ie).

IRELAND’S STRENGTHS AND OPPORTUNITIES FOR TARGET MARKET

IRELAND’S STRENGTHS
1. British Irish Visa Scheme
2. Bollywood ‘Ek Tha Tiger’
3. No language barrier
4. Drive on the same side of the road
5. Friendly & fun loving people

IRELAND’S OPPORTUNITIES
1. More Irish DMC’s and MICE in Indian market
2. Increase consumer awareness
3. Themed itineraries to Ireland
4. Motivating iconic experiences
5. Adapt product for Indian market

TOP 5 ATTRACTIONS
1. Giant’s Causeway
2. Cliffs of Moher
3. Dublin City/Trinity College
4. Belfast/Titanic Belfast
5. Ring of Kerry
TRAVEL TRADE MARKET

<table>
<thead>
<tr>
<th>TRAVEL TRADE</th>
<th>OVERVIEW</th>
<th>% OF TOURISM IRELAND’S TARGET MARKETS BOOKING THROUGH THIS PROVIDER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tour Operators / Wholesalers</td>
<td>Based in key cities across India</td>
<td>50%</td>
</tr>
<tr>
<td>Travel Agents</td>
<td>There are a few national operators but most travel agents are small, independent businesses</td>
<td>30%</td>
</tr>
<tr>
<td>MICE</td>
<td>Large tour operators have separate MICE divisions. Exclusive MICE agents are also growing.</td>
<td>10%</td>
</tr>
<tr>
<td>Online Travel Agents</td>
<td>OTAs are a growing sector as the outbound market grows. The top OTAs - Yatra, Make My Trip, Expedia, Cleartrip, Travelocity</td>
<td>5%</td>
</tr>
<tr>
<td>Online direct with airlines &amp; hotels</td>
<td>Experienced travellers have now started to book directly with airlines and hotels</td>
<td>5%</td>
</tr>
</tbody>
</table>

TRAVEL TRADE

1. Cox & Kings  
2. SOTC/Kuoni  
3. Thomas Cook India Ltd.  
4. Mercury Travels  
5. Vacations Exotica Balmer Lawrie Travel  
6. Make My Trip  
7. Yatra Online  
8. Kesari Tours  
9. Flight Shop/FCM  
10. Ottila International

CURRENT IRISH PROGRAMMES

Ireland group and FIT tours  
Ireland group and FIT tours  
Ireland group and FIT tours, MICE  
Ireland FIT tours  
Ireland group and FIT tours  
Ireland group and FIT tours  
Ireland group and FIT tours, MICE  
Ireland FIT tours

TOP 5 MEDIA CHANNELS FOR CONSUMERS

1. Television  
   English business news channels, lifestyle channels, English Entertainment channels, English movie channels.  
2. Newspapers  
3. Magazines  
   Business – Business Today, Business India, Forbes, Fortune  
   Travel – Jetwings, Condenast Traveller, Lonely Planet  
4. Radio  
   Radio One, Hit FM  
5. Online

TOP 5 MEDIA CHANNELS FOR TRAVEL TRADE

1. Express Travel World  
2. Travel Trends Today  
3. Trav Talk  
4. Travel Biz Monitor  
5. Voyager’s World
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