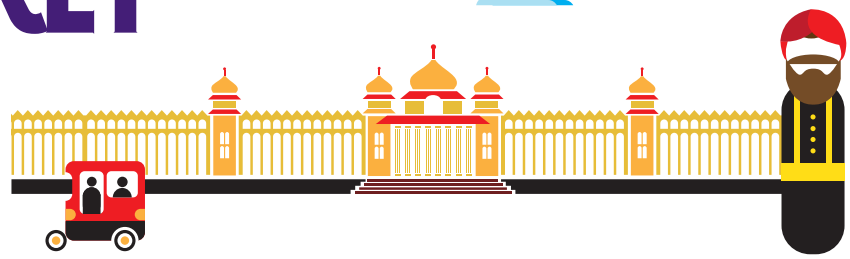
Tourism Ireland

INDIA MARKET SNAPSHOT

INDIA MARKET PROFILE | 2013



INDIA MARKET OVERVIEW

POPULATION	GDP PER CAPITA (US $)	ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)	MAJOR CITIES	LANGUAGE(S)	CURRENCY
1.2 billion	1,106	7%	Delhi Mumbai Kolkata Chennai	English Hindi	INR

INDIA OUTBOUND TRAVEL

YEAR	NUMBERS	YEAR ON YEAR GROWTH %
2010	12,900,000	16%
2011	14,200,000	10%
2012	15,000,000	6%

PURPOSE OF TRAVEL (% SHARE OF VISITS)

PURPOSE	Leisure	Business	VFR	Other
% (ESTIMATE)	50%	20%	10%	20%

TOP 5 DESTINATIONS TO VISIT

WORLD WIDE

1. Thailand
2. Singapore
3. United Arab Emirates
4. USA
5. United Kingdom

EUROPE

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

PEAK TRAVEL PERIODS

MONTH	AVERAGE LENGTH OF HOLIDAY
April - June	40 to 45 days
October – November (Diwali)	10 to 15 days
December	10 to 15 days

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 take admission. School holidays for these schools differ quite a bit from other Indian schools. School holidays follow the European pattern.

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OUTBOUND TRAVEL TO IRELAND

MARKET	2009	2010	2011	2012	2011 V'S 2012 % VARIANCE
India	14,000	14,000	18,000	21,000	17%

Tourism Ireland best estimates

TOURISM IRELAND'S TARGET MARKETS / SEGMENTS

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

WEEKLY FLIGHTS & SEATS FROM KEY CITIES IN INDIA TO IRELAND

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

VISA REQUIREMENTS

TO REPUBLIC OF IRELAND

Irish Visa Required

TO NORTHERN IRELAND

UK Visa Required

DOES THE VISA WAIVER PROGRAMME APPLY?

Yes

IRELAND'S STRENGTHS AND OPPORTUNITIES FOR TARGET MARKET

IRELAND'S STRENGTHS

1. Visa Waiver Programme
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

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TRAVEL TRADE MARKET

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

TRAVEL TRADE MARKET

TRAVEL TRADE	CURRENTLY PROGRAMME IRELAND
1. Cox & Kings	Ireland group and FIT tours
2. Kuoni/SOTC	Ireland group and FIT tours
3. Thomas Cook India Ltd	Ireland FIT tours
4. Mercury Travels	Ireland group and FIT tours
5. Vacations Exotica	Ireland group and FIT tours
6. Make My Trip	Ireland FIT tours
7. Destination Travels	Ireland FIT tours
8. Hi Tours	Ireland FIT tours
9. Aman Travels	Ireland FIT tours
10. Saltours	Ireland FIT tours

TRAVEL TRADE MARKET

TOP 5 MEDIA CHANNELS FOR CONSUMERS

1. Television
   English business news channels, lifestyle channels, English Entertainment channels, English movie channels.
2. Newspapers
   English Dailies – Times of India, Hindustan Times, The Hindu, The Economic Times, Business Standard
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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TOURISM IRELAND COUNTRY CLUB PROGRAMME

Tourism Ireland's Country Club Programme for India was designed to provide you with a platform to easily explore, make contacts and develop business from the new and developing markets which have the greatest long term growth potential for inbound tourism to Ireland.

There are two Country Club packages for the Irish Industry to choose from:

Option 1 THE ADVENTURER €1,000 / £870

Full Country Club membership to include attendance at a Sales Mission

- Participation in the India Sales Mission
- One return economy class flight to India
- Priority on Failte Ireland and Northern Ireland Tourist Board itineraries for media and trade fam trips
- Workshops with visiting travel trade to Ireland
- Cultural awareness training
- A link on www.ireland.com/en-in
- Inclusion in ezines, press releases and social media
- Quarterly intelligence reports – exclusive to Country Club Members

Option 2 THE EXPLORER €450 / £400

A reduced Country Club membership aimed at those who wish to be involved in the market but do not want to attend the Sales Missions.

- Priority on Failte Ireland and Northern Ireland Tourist Board itineraries for media and trade fam trips
- Workshops with visiting travel trade to Ireland
- Cultural awareness training
- A link on www.ireland.com/en-in
- Inclusion in ezines, press releases and social media
- Quarterly intelligence reports – exclusive to Country Club Member

YOUR COMMITMENT TO INDIA

- A commitment from you to work with India for at least three years to build contacts, relationships and clients.
- Offer Failte Ireland and Northern Ireland Tourist Board preferable rates for media visits and trade familiarisation trips.
- Adaption of your product or service as necessary to service the markets needs

Country	Date
India Sales Mission 2014	TBC

For more information or to join Tourism Ireland's Country Club Programme for India, China or GCC please visit:

tourismirelandindustryopportunities.com

CONTACT INFORMATION

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