



India Market Snapshot

Irish Business with India

- ▶ 90 Indian Companies have made Ireland their home.
- ▶ Six out of top ten IT companies are Indian that includes TCS/Tech Mahindra/ HCL/Infosys and Wipro.
- ▶ Many Pharma companies also have made their mark in Ireland that include Unichem/ Biotech/ Vision care SMPT Crompton Grief/ red Seal/ Deepak fastner.



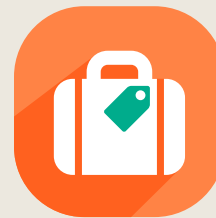
India Business investment into Ireland

Booking lead times?

2-3 months in general however post the British Irish Visa Scheme many travellers especially the VFR take up holidays in Dublin and Belfast during the week while visiting their relatives or children in London.

Visitor mix?

Group Tours, Free Individual Travellers, Families, DINKS, Honeymooners, Visiting Friends and Relatives, MICE.



Marketing/communications - core messages in presenting Ireland to India

- ▶ Ireland as a family destination
- ▶ Gastronomy
- ▶ Shopping
- ▶ Value for money
- ▶ Nightlife
- ▶ Natural Beauty



Promotional & marketing opportunities

India Sales Mission, Joint promotional activities with leading travel trade and airlines, Ireland Specialists Programme.



Popular search engines

Google, MSN, Yahoo

Popular social media platforms

Facebook, Twitter, Instagram, Snap chat, LinkedIn



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Driving tourism business with Indiamarket -



Things to consider

Easy access to visa rules

Easy and frequent air connectivity.

Bollywood or Hollywood movies being shot in that destination.

Popular celebrities visiting the destination.

Investing time and efforts on Destination training.

Having a reliable resource to contact for getting quotations on queries (Indians make quite a lot of changes to the itinerary and choices) so here having a patient approach works well.



Servicing India Market Visitors - cultural norms and preferences

The Indian travellers to Ireland are mostly very evolved and well travelled. They aren't the first time travellers. A few may be very particular on vegetarian/vegan meals where they don't even eat bread. They look for variety across their meals. Indian travellers are very price sensitive yet spend. They love to get value for money deals and are big shoppers. The new generation youth travellers (the honeymooners) not only do a lot of shopping they are also very pro luxury. Nightlife is another option the youth travellers enjoy. Temple bar and Irish pubs that play traditional music are popular. Variety of food and value for money is important to the Indian traveller. To name preferences food (variety), value for money deals are the pointers they would look for.

Contact Information

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India Market Snapshot

INDIA MARKET OVERVIEW

POPULATION	GDP PER CAPITA (US \$)	ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)	MAJOR CITIES	LANGUAGE(S)	CURRENCY
1.35 billion	2,134	7.2%	Delhi Mumbai Bangalore Kolkata Chennai	English Hindi	INR

INDIA OUTBOUND TRAVEL PURPOSE OF TRAVEL (% SHARE OF VISITS)

YEAR	NUMBERS	YEAR ON YEAR GROWTH %	PURPOSE			
			Leisure	Business	VFR	Other
2013	16,630,000	11%	50%	20%	10%	20%
2014	18,330,000	10.3%				
2015	20,380,000	11.1%				
2016	21,870,000	7.3%				
2017	23,000,000	5.2%				



TOP 5 DESTINATIONS TO VISIT

WORLD WIDE

1. Singapore
2. Thailand
3. Malaysia
4. Hong Kong
5. UAE

EUROPE

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



PEAK TRAVEL PERIODS

MONTH	AVERAGE LENGTH OF HOLIDAY
April - June	10 to 15 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 attend. School holidays for these schools differ quite a bit from other Indian schools. School holidays follow the European pattern.

OUTBOUND TRAVEL TO IRELAND

MARKET	2013	YoY increase	2014	YoY increase	2015	YoY increase	2016	YoY increase
India	15,000-25,000	4.4%	16,000 -27,000	7.5%	20,000-30,000	16%	25,000-35,000	20%



India Market Snapshot

India Market Profile

TOURISM IRELANDS TARGET MARKETS / SEGMENTS

NAME	AGE	PROFILE	% OF TOTAL POPULATION	HOW DO THEY BOOK THEIR HOLIDAY?	ACCOMMODATION 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	<ul style="list-style-type: none"> - High net-worth individuals - Self Employed Professionals - CEO, Senior Corporate Executives - Double income households - Empty Nesters 	2%	<ul style="list-style-type: none"> - Travel agents - Online 	<ul style="list-style-type: none"> 5 star 4 star 3 star 	<ul style="list-style-type: none"> - Group tours - Self drive - Chauffeur service 	<ul style="list-style-type: none"> - 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	ONE-STOP AIRLINES
Mumbai	1118	19,980	Etiihad Airways, Emirates Airlines, Qatar Airways, Air France, British Airways, Jet Airways, KLM, Lufftansa, Swiss Air, Turkish Airlines, Virgin Atlantic
New Delhi	92	15,300	Air France, British Airways, Emirates, Etihad Airways, Qatar Airways, Jet Airways, KLM, Lufftansa Airways, Swiss Air, Turkish Airways, Virgin Atlantic
Bangalore	58	9,180	Air France, British Airways, Emirates, Etihad Airways, Jet Airways, KLM, Lufftansa Airways, Swiss Air, Turkish Airways, Virgin Atlantic
Chennai	49	7,560	Air France, British Airways, Emirates, Etihad Airways, Qatar Airways, Jet Airways, KLM, Lufftansa Airways, Swiss Air, Turkish Airways, Virgin Atlantic

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. Screen Tourism
 - Game of Thrones/Star Wars
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



India Market Snapshot

Routes to 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

1. Thomas Cook
2. Cox & Kings
3. SOTC
4. Make My Trip
5. Veena World
6. Kulin Kumar Holidays
7. Otila International
8. FCM
9. Kesari/Strawberi Holidays
10. Destination Travels

CURRENT IRISH PROGRAMMES

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

TRAVEL TRADE MARKET

TOP 5 MEDIA CHANNELS FOR CONSUMERS

1. Online
2. Television
English business news channels, lifestyle channels, English Entertainment channels, English movie channels.
3. Newspapers
English Dailies – Times of India, Hindustan Times, The Hindu, The Economic Times, Business Standard
4. Radio
Radio One Hit FM 5.
5. Magazines
Business – Business Today, Business India, Forbes, Fortune
Travel – Jetwings, Cond Nast Traveller, Lonely Planet

TOP 5 MEDIA CHANNELS FOR TRAVEL TRADE

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



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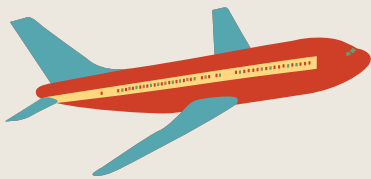
Sales channels & travel intermediaries - major offline channels & major online channels

Major offline Channels :

- ▶ Thomas Cook
- ▶ SOTC/Kuoni
- ▶ Cox and Kings
- ▶ Mercury Travels
- ▶ FCM
- ▶ N Chirag
- ▶ Paras Holidays
- ▶ Dpauls
- ▶ Holiday Boosters etc

Major Online Channels:

- ▶ MakeMyTrip
- ▶ Yatra
- ▶ Cleartrip
- ▶ Expedia



Why Indian visitors choose Ireland?

Ireland has always attracted Indian visitors because of its warm hospitality and natural beauty. The close proximity to UK and good air connectivity make it even better. Though there aren't any direct flights to Dublin or Belfast yet the Gulf connections and connections from UK have been convenient thus helpful. British Irish Visa Scheme made it even better with Indian consumers who prefer travelling more destinations in one trip. Post British Irish Visa Scheme the combinations of London, Scotland and Dublin/ Belfast have picked up well. The well travelled Indian today looks for newer destinations in easy proximity and Ireland meets up this criterion well.

Metasearch; peer review; GDS?

Amadeus/ Travelport/ Galileo

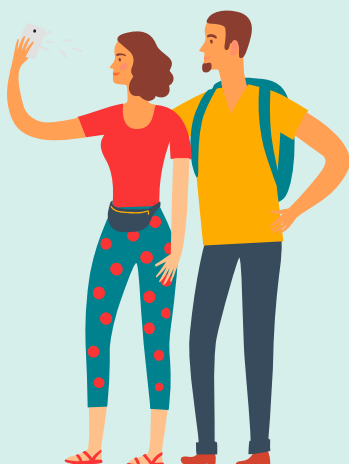
E-Commerce/mobile wallet payments?

Consumers:

- ▶ Bank remittance
- ▶ cash
- ▶ cheque

Suppliers:

- ▶ Bank remittance



Stages/Influences in the Travel Journey for India market - inspiration, planning, booking, etc

Inspiration: An Indian Traveller is inspired by several means to choose a destination. That can be a popular movie being shot in there for example Game of Thrones has made Northern Ireland very popular amongst the youth. Ek tha tiger movie has made Trinity a popular name and many more add up to the list. Indians are inspired by advertisements (all mediums), word of mouth and recommendations by their trusted travel agent.

Planning: take place at home where the kids and women of the house play a very vital role. This takes a lot of time and goes back and forth many times.

Booking: can be made either online or through a travel agent or in parts through both the medium. Then the travellers travels and posts a lot of it on social media where another inspiration begins to continue the cycle.