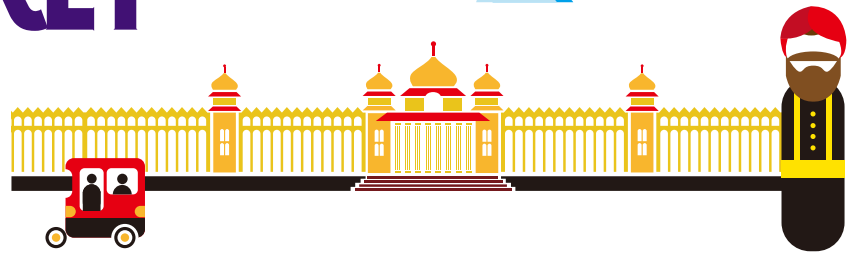


INDIA MARKET SNAPSHOT

INDIA MARKET PROFILE | 2015



INDIA MARKET OVERVIEW

POPULATION	GDP PER CAPITA (US \$)	ANNUAL AVERAGE GDP GROWTH OVER PAST DECADE (%)	MAJOR CITIES	LANGUAGE(S)	CURRENCY
1.27 billion	1,165	6%	Delhi Mumbai Bangalore 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%
2013	16,630,000	11%



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. Malaysia
4. UAE
5. USA

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.

INDIA MARKET SNAPSHOT

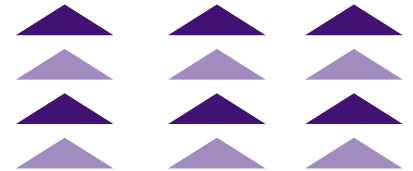
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OUTBOUND TRAVEL TO IRELAND

MARKET	2013	2014	2013 V'S 2014 % VARIANCE
India	20,000	22,000	10%

Tourism Ireland best estimates



TOURISM IRELAND'S 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"> - A 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	INDIRECT AIRLINES
Mumbai	111	19,980	Air France, British Airways, Emirates, Etihad Airways, Jet Airways, KLM, Lufthansa Airways, Swiss Air, Turkish Airways, Virgin Atlantic
Delhi	85	15,300	Air France, British Airways, Emirates, Etihad Airways, Jet Airways, KLM, Lufthansa 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

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

INDIA MARKET SNAPSHOT

INDIA MARKET PROFILE | 2015

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

1. Cox & Kings
2. Kuoni/SOTC
3. Thomas Cook India Ltd
4. Mercury Travels
5. Vacations Exotica Balmer Lawrie Travel
6. Make My Trip
7. Destination Travels
8. Hi Tours
9. Ambe World Travels
10. Ottila International

CURRENT IRISH PROGRAMMES

- Ireland group and FIT tours
- Ireland group and FIT tours
- Ireland group and FIT tours
- Ireland FIT tours
- Ireland group and FIT tours
- Ireland FIT tours
- Ireland FIT tours
- Ireland FIT tours
- Ireland FIT tours
- 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, Condensast Traveller, Lonely Planet
4. Radio
Radio One Hit FM
5. Online

TOP 5 MEDIA CHANNELS FOR TRAVEL TRADE

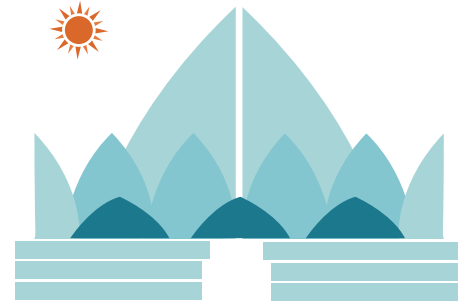
1. Express Travel World
2. Travel Trends Today
3. Trav Talk
4. Travel Biz Monitor
5. Voyager's World





INDIA MARKET SNAPSHOT

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