Market and Trade Profile: India

April 2021

Destination Bristol ©Gary Newman

Overview

- **'Chapter 1: Inbound market statistics'** provides insights on key statistics about Indian travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **'Chapter 2: Experiences and perceptions'** features details about what visitors from India are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by Indians in general are also highlighted.
- **'Chapter 3: Understanding the market'** takes a close look at consumer trends in India, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach Indian consumers are indicated, too.
- **'Chapter 4: Access and travel trade'** shows how people from India travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the Indian travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

Please note that the majority of this report refers to the market conditions for travel from India to the UK prior to the COVID-19 pandemic, and gives some insight on changes which have resulted from the crisis. An international recovery sentiment tracking survey is available.

Contents

Executive Summary

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1: Inbound market statistics

Chapter summary

- With a new record reached for inbound spend in 2019, India was the UK's 16th largest inbound market by volume, and 11th by spend in that year.
- Due to the COVID-19 outbreak in Q1 2020, visits from India to the UK decreased by 42% in the first three months of 2020 compared to those months in 2019, down to to 69,000**. However, data from UKVI revealed some resilience to travel in 2020, with an increase of student visas issued to Indian nationals in 2020 vs. 2019, and almost 600,000 applications for UK visit visas throughout the year (just over one fifth of those seen in 2019).
- In 2019, Indian visits lasted over twice as long as the all-market average, and visitors spent 57% more per visit.
- Regional England outside London is the leading destination for Indian visitors in Britain, accounting for 47% of visitor nights in 2019, on par with the all-market average. Indians are more likely to spend time in the West Midlands than other visitors, and Birmingham is their fifth most visited city on average (2017-2019).
- Visitors come mainly from Delhi and Maharashtra, and the average visitor has become slightly older in the last few years.
- One third of Indian visits to the UK are to visit friends and relatives, higher than the all-market average; over half of Indian visitor nights are spent staying with friends or relatives.
- India presents some characteristics of an emerging market for visits to the UK, with two thirds of holiday visits made by first-timers*. The UK was the second most visited market in Europe for Indian travellers in 2019.

Source: International Passenger Survey by ONS, UNWTO: *excluding British expats, based on IPS 2015, UKVI ** provisional data for January-March 2020 (latest available at time of writing)

+16%

growth in spend from Indian visitors in the UK from 2018 to 2019

2: Experiences and perceptions

Chapter summary

- Top activities featuring in visits from India to the UK include dining in restaurants, sightseeing and shopping.
- The British countryside is a main draw for Indian leisure visitors, and Indians rank the country's natural beauty significantly higher than other markets do (rank 7 vs. the all-market average of 23 in 2020).
- Films, museums and music are the cultural products that Indians associate the most with Britain. When visiting, they have an above-average propensity to watch live cricket.
- Britain rates well among some competitor destinations for its history/ historic sites, entertainment/ nightlife and visiting world famous sites and places. Indian travellers also have a strong link with Britain, but Australia is the destination that they consider the 'best place' for delivering what they most want from a holiday (nature).

Main reasons why Indian holidaymakers visited Britain:

Wide variety of places to visit, countryside/ natural beauty, and climate/weather

Source: Anholt Nation Brands Index 2020 (powered by Ipsos), Arkenford 2013, International Passenger Survey by ONS, VisitBritain/IPSOS 2016

3: Understanding the market

Chapter summary

- India is the second most populated country in the world, with 1.4bn inhabitants. It is home to the largest young population in the world, with a median age of 29 years in 2020.
- Over the last ten years the number of international outbound visits from India has grown over ten times faster than the population.
- 48% of Indian holiday visitors tend to start thinking about their trip to Britain early; more than half a year in advance. However, almost half of them (46%) decided on Britain as their destination between 3 and 6 months in advance, and about two thirds booked within two months of travelling.
- India and the UK have longstanding ties, and the UK currently has an Indian diaspora of over 1.5 million. The two countries' strategic partnership covers trade, defence, and security, and talks are currently in progress working towards a possible India-UK free trade agreement.
- India's economy saw a profound negative impact due to the coronavirus pandemic, seeing its worst slump since 1996. However, a positive shift took place towards the end of 2020, with recovery prospects looking more favourable than expected. India is home to the world's largest COVID-19 vaccine drive, with the government aiming to inoculate 300 million citizens before August 2021.

Source: Oxford Economics, UN Population Prospects, TCI/VisitBritain/VisitScotland/VisitWales/London&Partners February 2021, VisitBritain/IPSOS 2016, Hindustan Times, LiveMint

Europe

is the global region that Indian travellers are most likely to consider for their next international leisure trip

4: Access and travel trade

Chapter summary

- Most Indian visits to the UK were made by plane (89%) in 2019. A further 6% of visits by sea, and 5% by the tunnel, implying a combined itinerary with another European country.
- Although airline seat capacity has been challenged from 2012 to 2019, more seats on direct, non-stopping routes from India are going to the UK than to anywhere else in Europe.
- Two airlines accounted for 79% of the direct seat capacity between India and Britain in 2019: British Airways and Air India. Jet Airways stopped operating flights to the UK in April 2019. However, SpiceJet and Vistara launched new routes in 2020.
- Due to the COVID-19 outbreak, seat capacity from India to the UK had dropped by 91% by April 2020 compared to the same month in 2019. However, a travel bubble agreement between the two markets put in place in July 2020 did trigger some recovery, with seats at 48% of 2019 levels on average through the year. Departures are planned to stay at a low level for at least H1 2021.
- The online Indian travel trade is becoming more important although many Indians still prefer booking trips abroad via traditional agents, especially for long-haul travel.

89%

Of visits to Britain from India were made by plane in 2019

Source: International Passenger Survey by ONS, Apex Rdc (direct, non-stopping routes only, exluding charter flights operated by TUI/Thomson Airways and Thomas Cook Airlines)

Inbound market statistics

Chapter 1

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1.1 Key statistics

Key insights

- Visitors from India to the UK set a new record for spend in 2019, reaching £753m spent in the country.
- India was Britain's 16th largest source market in terms of visits and 11th most valuable for visitor spending in 2019. It was also the second BRIC market in terms of visits and spend*.
- In 2019, people visiting friends or relatives (VFR) accounted for 51% of the nights spent in the UK by visitors from India, 33% of all visits and 17% of their inbound spend. Holiday visits accounted for 30% of visits; a larger share than business visits.
- Q3 (Jul-Sep) was the most popular quarter for a visit from India to the UK in 2019, but Q2 (Apr-Jun) was not far behind.
- Twice as many visits from Indian holidaymakers were bought as part of a package or an all-inclusive tour as the all-market average.
- Most Indian visitors to the UK are first-time visitors.

$22.9bn

outbound tourism expenditure in 2019

Source: International Passenger Survey by ONS, UNWTO *The four BRIC markets are Brazil, Russia, India and China

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	22.9
Global rank for international tourism expenditure	15
Number of outbound overnight visits (m)	21.7
Most visited destination	UAE
Most visited destination in Europe	France

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+116%	+47%	+142%
2009	320	8,430	311
2010	415	10,927	407
2011	396	9,315	358
2012	366	7,932	362
2013	403	10,153	475
2014	418	9,846	461
2015	458	10,139	480
2016	484	11,295	508
2017	696	13,365	577
2018	680	13,716	647
2019	692	12,356	753
Share of UK total in 2019	**1.7%**	**4.3%**	**2.6%**

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	692	+2%	16
Nights (000s)	12,356	-10%	8
Spend (£m)	753	+16%	11

Due to the COVID-19 outbreak in Q1 2020, visits from India to the UK decreased by 42% in the first three months of 2020 compared to those months in 2019, down to to 69,000*.

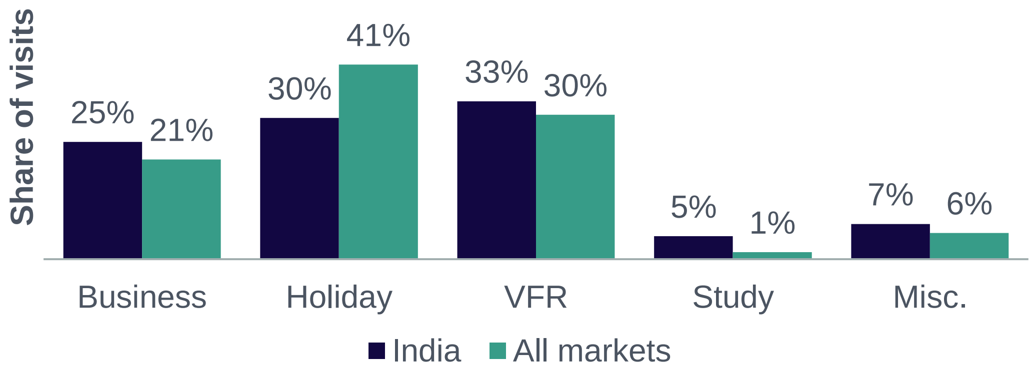
Key metrics by journey purpose (2017-2019)

Averages by journey purpose	Nights per visit	Spend per night	Spend per visit
Holiday	8	£89	£757
Business	14	£98	£1,332
Visiting Friends/ Relatives	29	£21	£612
Study**	68	£53	£3,605
Misc.**	10	£164	£1,611
All visits	19	£50	£956

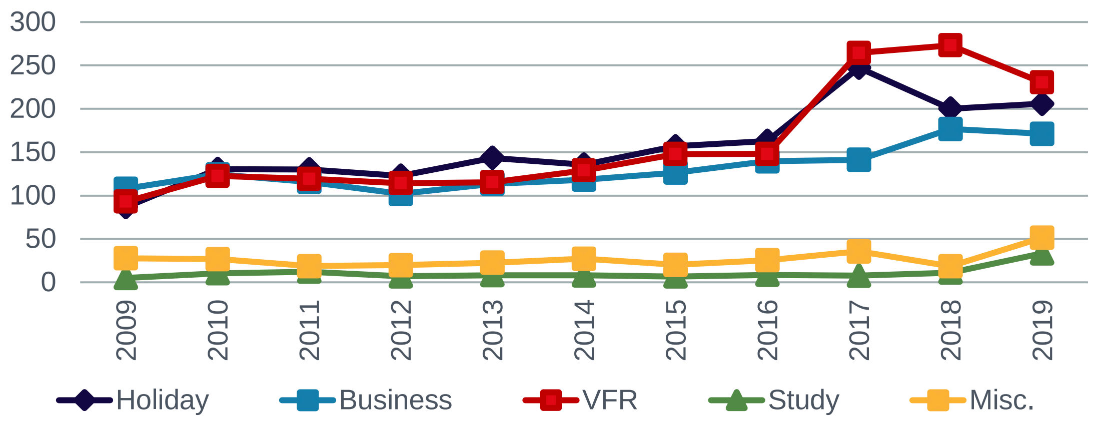
Source: International Passenger Survey by ONS, *provisional data for January-March 2020, latest statistics at time of writing **small base

1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trends (visits 000s)



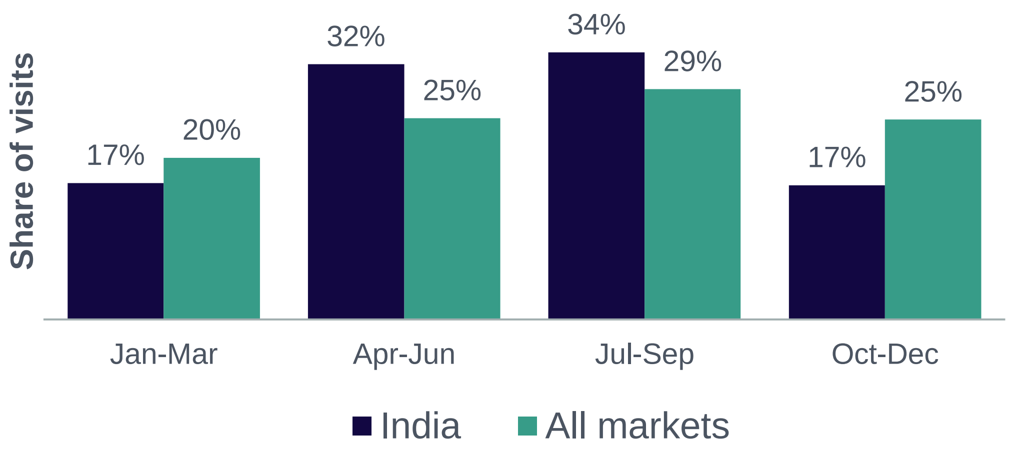
- In 2019, people visiting friends or relatives (VFR) accounted for 51% of the nights spent in the UK by visitors from India, 33% of all visits from India and 17% of their inbound spend.
- Holiday visits accounted for 30% of visits, a slightly larger share than business visits (25%). However, holiday and business visits accounted for 21% and 32% respectively of all the inbound spend from India in 2019.
- Study visitors from India tend to stay longer than all other visitors from India, while business visitors spend more per visit than holiday visitors and those visiting friends and family.

- After a sharp rise in 2017, there was a drop in holiday visits in 2018, and volumes stayed at this level in 2019.
- VFR visits have now been the most common journey purpose for three years in a row. In 2019, 24,000 more Indian visitors came to the UK to visit friends and relatives than for a holiday trip. However, visits, nights and spend for VFR were down in 2019 vs. 2018.
- Business visits were also down by 3% in 2019 vs. 2018. Study visits appeared to significantly rise in 2019; however, small sample sizes mean that this insight should be treated with caution.

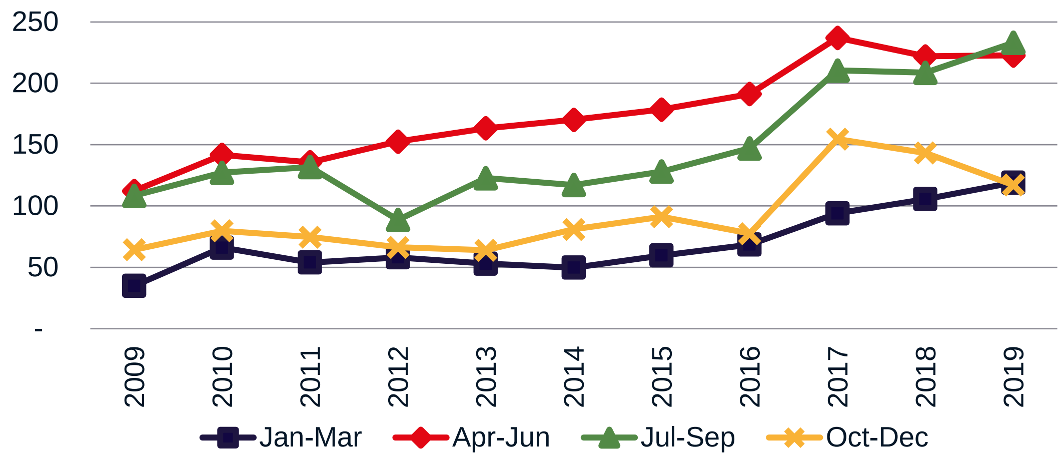
Source: International Passenger Survey by ONS

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)

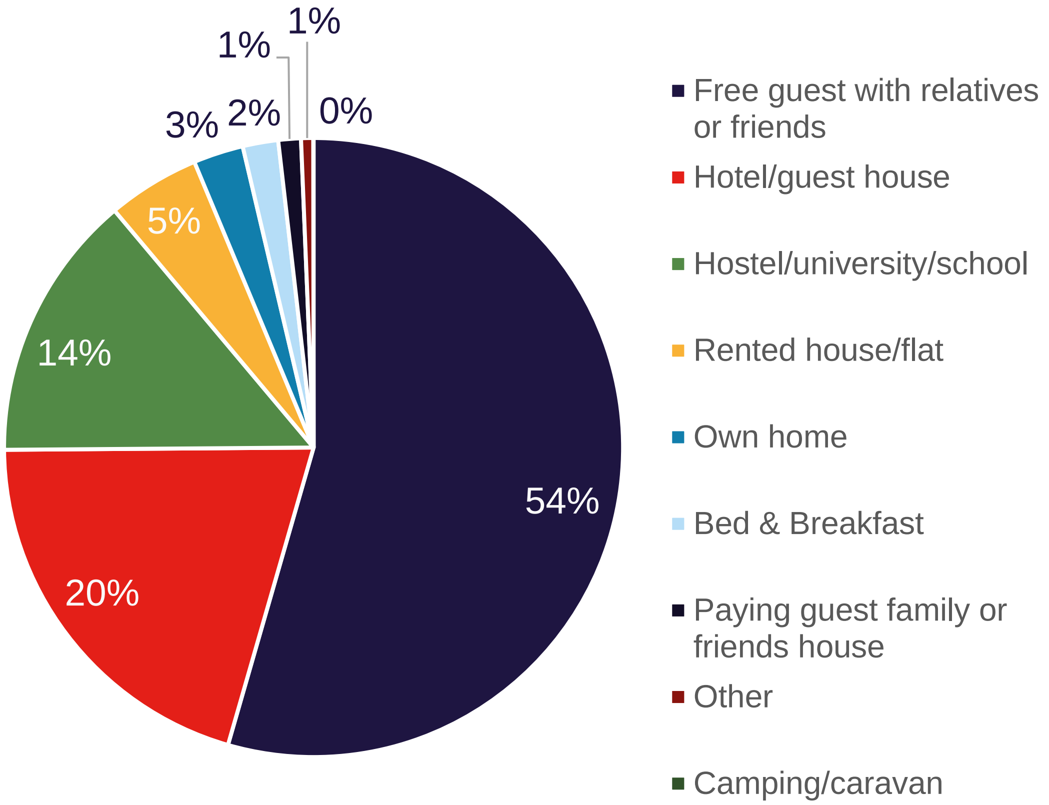


- In 2019, two thirds of the visits from India to the UK were made between April and September.
- Jul-Sep was the most popular time for visits from India to the UK with 34% of all 2019 UK-inbound visits from India taking place during this time; however, Apr-Jun was only 2 percentage points behind. The proportion of visits in these quarters are both well above the all-market average. In 2018, Apr-Jun was the most popular quarter; however, Jul-Sep overtook it in the most recent year.
- Q1 and Q4 have a similar popularity for Indian visitors, with 17% of visits taking place in these months in 2019.

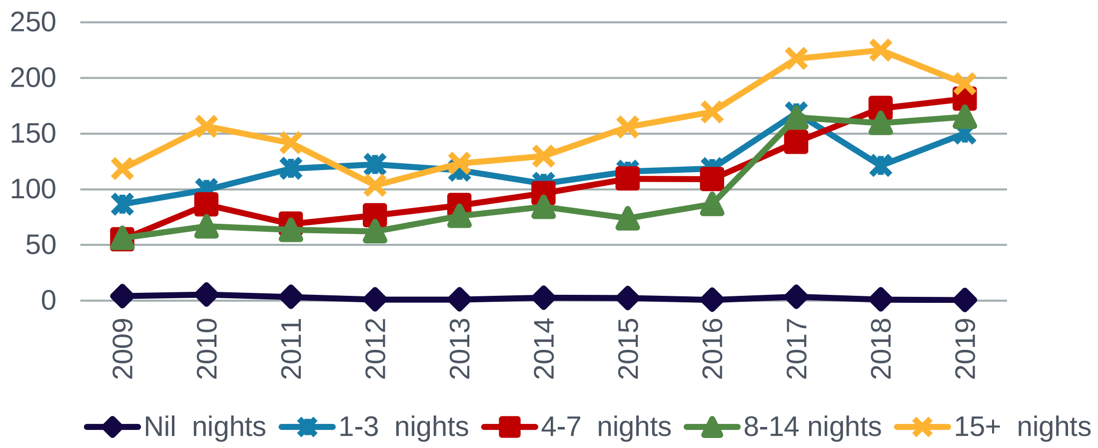
Source: International Passenger Survey by ONS

1.1 Key statistics: length of stay and accommodation

Accommodation stayed in, in 2019 (nights, %share)



Duration of stay trend (visits 000s)

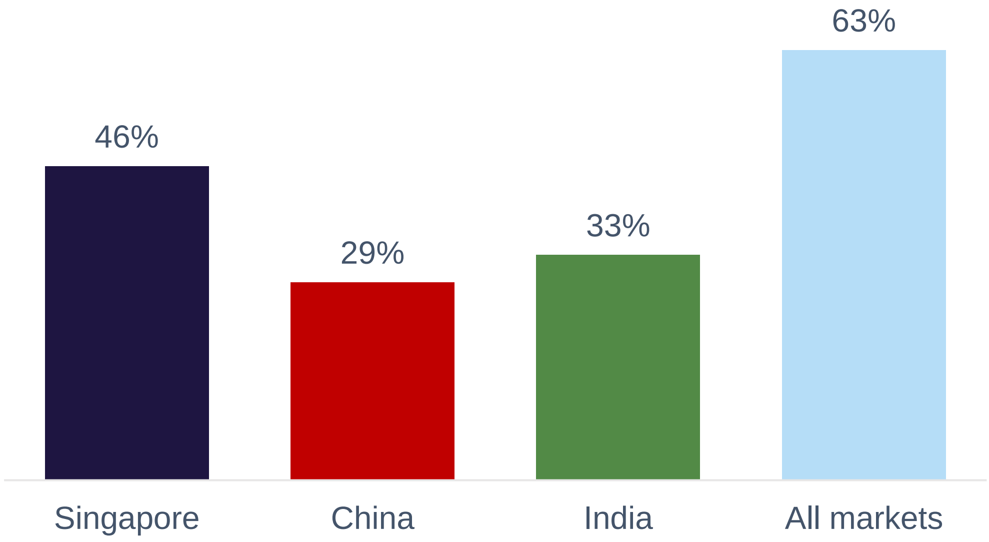


- Indian visitors tend to stay longer than the all-market average visitor, spending 19 nights on average per visit in the UK, compared to just 7 across all markets in 2018. The large volume of 15+ night stays accounts for this.
- The Indian inbound market to the UK is still very much influenced by visits to friends and relatives. This can explain why 54% of nights spent by Indian visitors in the UK in 2019 were spent for free as a guest at friends' or relatives' homes. This is followed as the most common accommodation type by hotel/guest house (20%), and rented house/flat (14%).

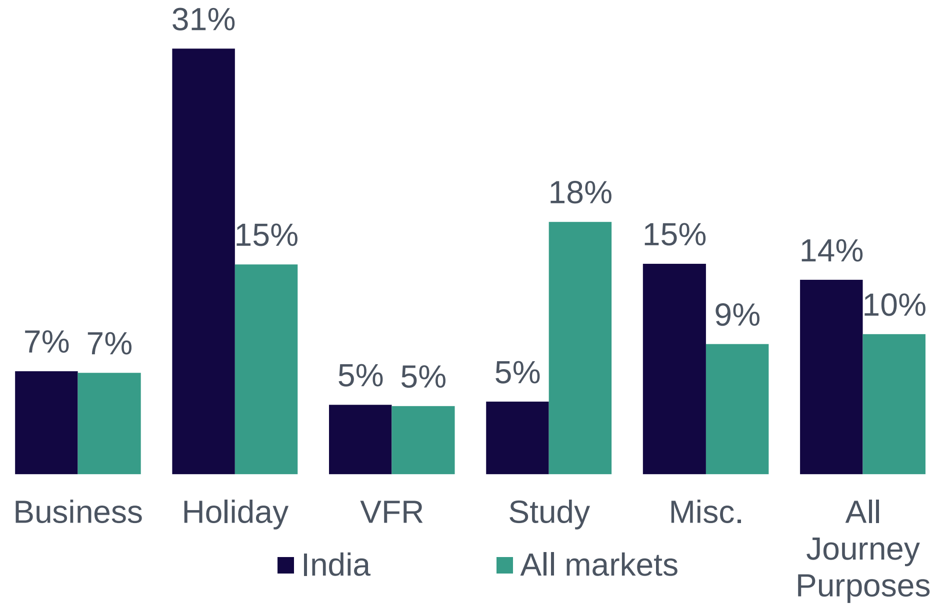
Source: International Passenger Survey by ONS

1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK who have been to the UK before*



Proportion of visits that are bought as part of a package or all-inclusive tour in 2019**



- Only 33% of holiday visits from Indian residents to the UK (excluding UK nationals) were made by repeat visitors in 2015, but this share among VFR visits from India was doubled (66%).
- The proportion of Indian holiday visits to the UK bought as part of a package, or all-inclusive tour is more than double the all-market average in 2019. This shows the importance of tour and packages for a market that is still very much growing, where first-timers outnumber repeat visitors.

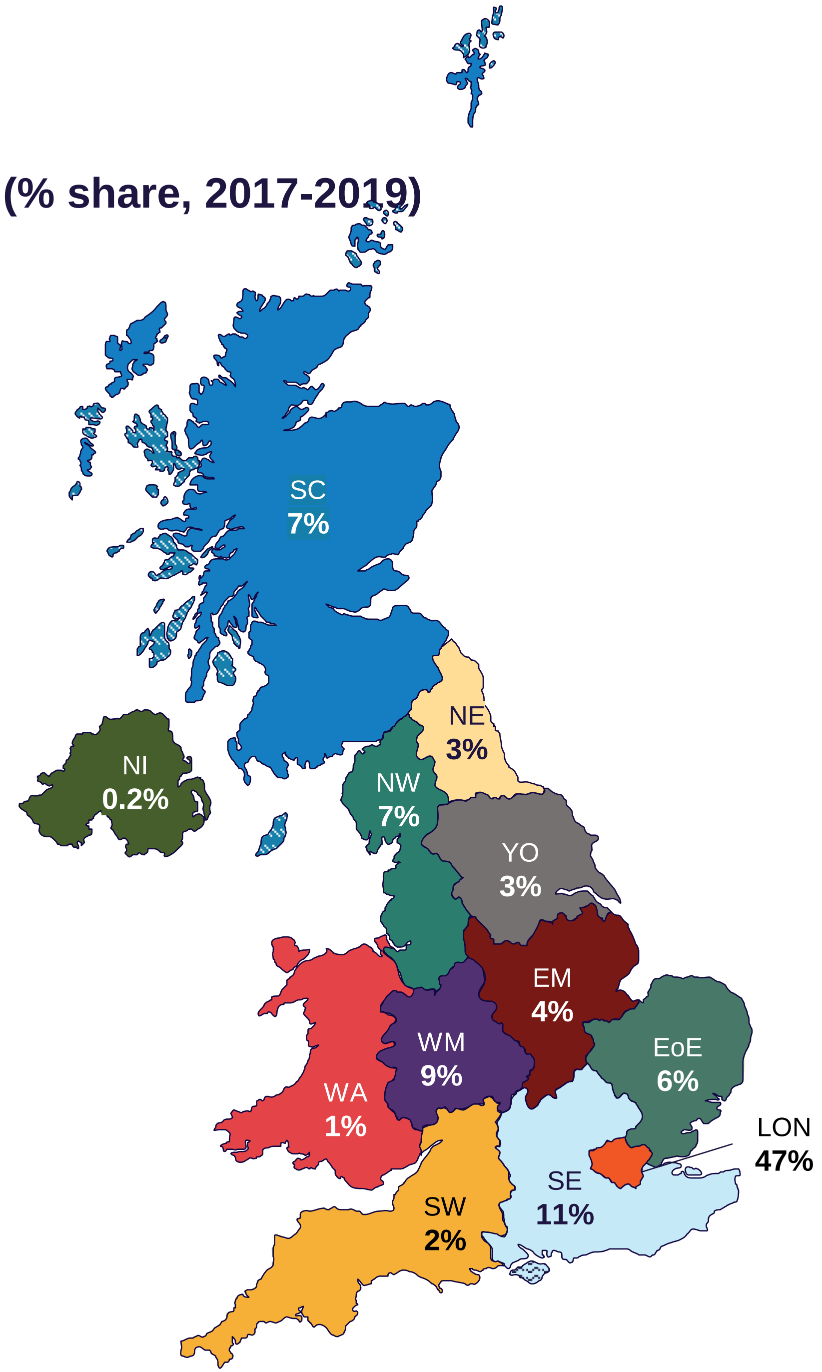
International Passenger Survey by ONS. *2015, excluding British nationals;
**See definition of a package holiday in appendix

1.2 Getting around Britain

Annual visits to the UK (2017-2019 average)

Region	Nights stayed (000)	Visits (000)	Spend (£m)
Total	13,147	690	658
Scotland (SC)	932	67	37
Wales (WA)	142	9	20
Northern Ireland (NI)	21	3	1
London (LDN)	6,161	470	378
North East (NE)	374	7	11
North West (NW)	871	40	41
Yorkshire (YO)	404	17	14
West Midlands (WM)	1,176	47	40
East Midlands (EM)	571	22	15
East of England (EoE)	779	37	26
South West (SW)	288	24	15
South East (SE)	1,428	78	59
Nil nights (Nil)	N/A	2	0.2

Nights (% share, 2017-2019)



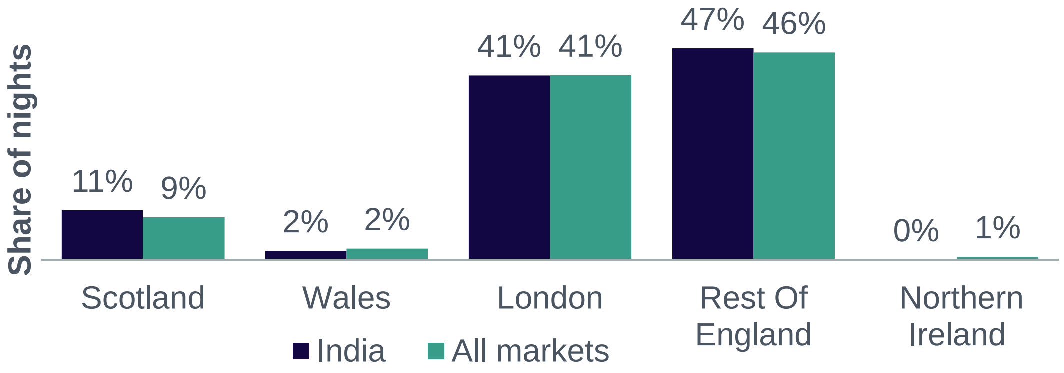
Source: International Passenger Survey by ONS

1.2 Getting around Britain: regional spread and top towns/cities

Top towns and cities visited (2017-2019)

Town	Visits (000s)
London	470
Edinburgh	42
Glasgow	23
Manchester	22
Birmingham	21

Regional spread 2019

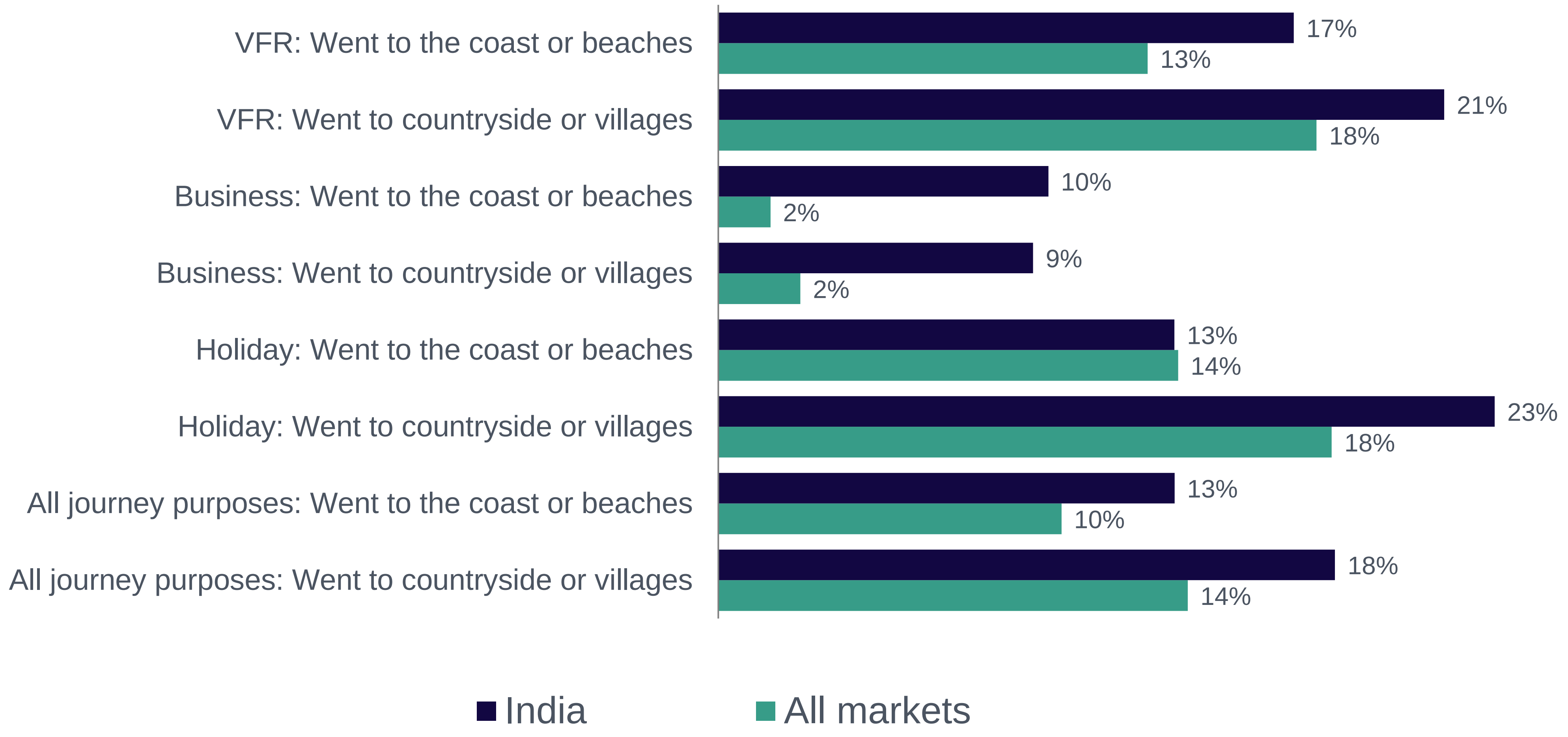


- The Rest of England is the leading destination for a trip to Britain, accounting for 47% of Indian visitor nights in 2019, on par with the all-market average.
- 41% of nights from India were spent in London in 2019, also on par with the all market average.
- Indian visitors are slightly more likely than the average traveller to spend time in Scotland.
- From 2017-2019, Indians were more likely to spend time in the West Midlands than the average inbound visitor (9% of nights, vs. 5% from all markets), and this is also the case for the East Midlands (4% vs. 3%) and the East of England (6% vs. 5%).
- Visits from India have an above-average propensity to feature going to rural and coastal areas of Britain, with Indian holiday visitors particularly likely to visit the countryside and villages.

Source: International Passenger Survey by ONS, FUR Reiseanalyse 2016-2019 * Reiseanalyse 2019

1.2 Getting around Britain: visits to coast, countryside and villages

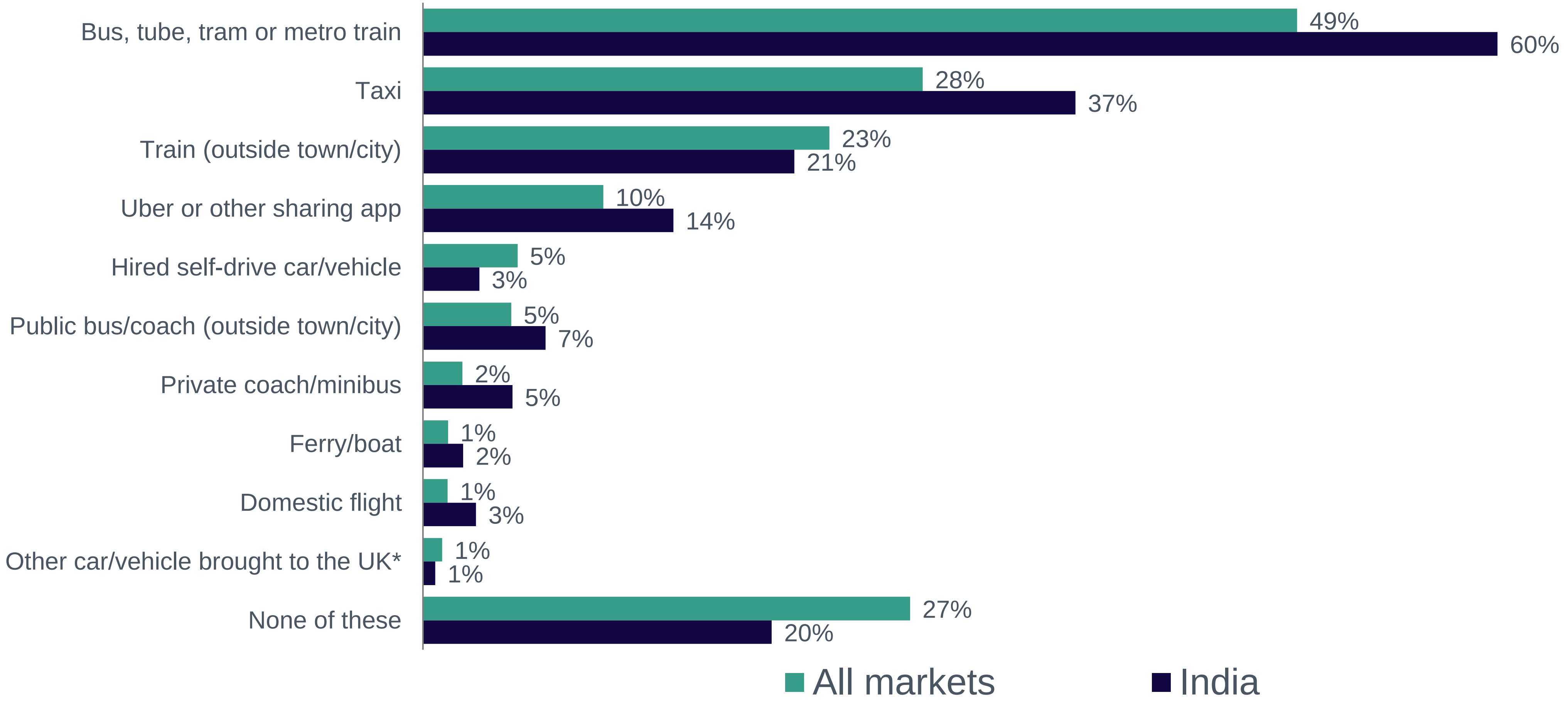
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

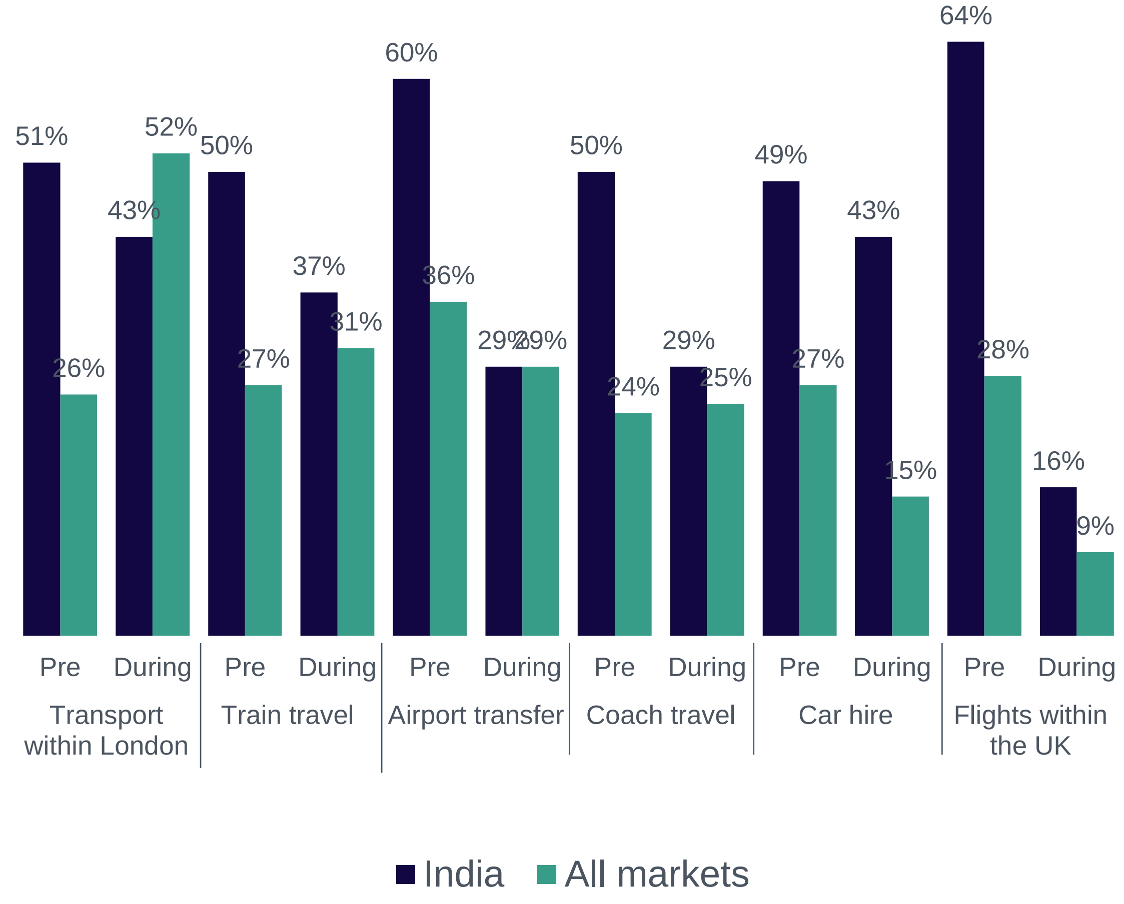
Propensity to use internal modes of transport



Source: International Passenger Survey by ONS 2018; most lorry drivers were not asked this question, and as a consequence, are not taken into account in the results for ‘car/vehicle you/group brought to the UK

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



- Indian visitors are more likely than the average to take taxis or to take public transport when staying in a town or a city, with 37% and 60% respectively doing so, compared to 28% and 49% respectively for the all-market average.
- When getting out of a town or city, they are also more likely to get on a public bus or coach (7%, compared to 5% across all markets), or take a domestic flight (3%, vs 1% for the all-market average).
- Usually they also tend to prefer booking transport services before they travel, with more Indian holiday visitors booking their transport options before the trip than during.

Source: VisitBritain/IPSOS 2016, base: visitors

1.3 Visitor demographics

Visitor characteristics

- 70% of visitors from India are men; significantly higher than the all market average, and visitors for all journey purposes are more likely to be men than women.
- In 2019, almost a third of visitors from India were aged 55+, which is above the all-market average (21%).
- In recent years the share of visitors younger than 35 years old has fallen from 38% of all visits in 2009 to 29% in 2019.
- Almost all visits from Indian residents to the UK are made by Indian nationals (98%).
- Most visits from India to the UK are made from residents of the states of Maharashtra (which contains Mumbai) and Delhi. 53% of visitors to the UK live in those two individual cities.

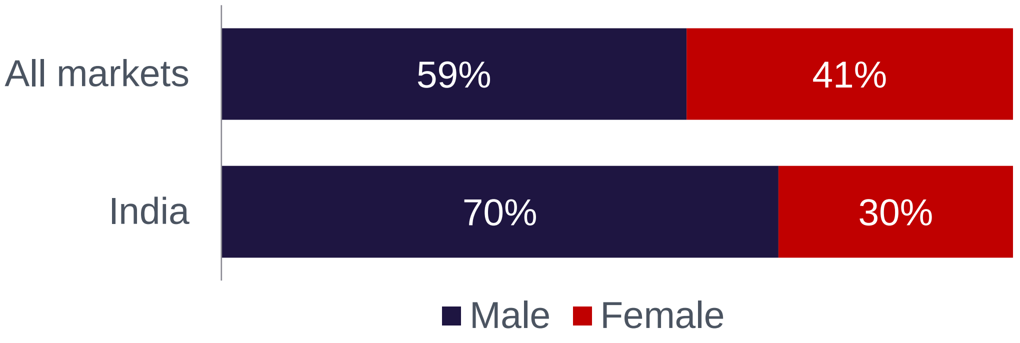
Over 1-in-2

visits from India to the UK were made by people in the Delhi or Maharashtra states

Source: International Passenger Survey by ONS

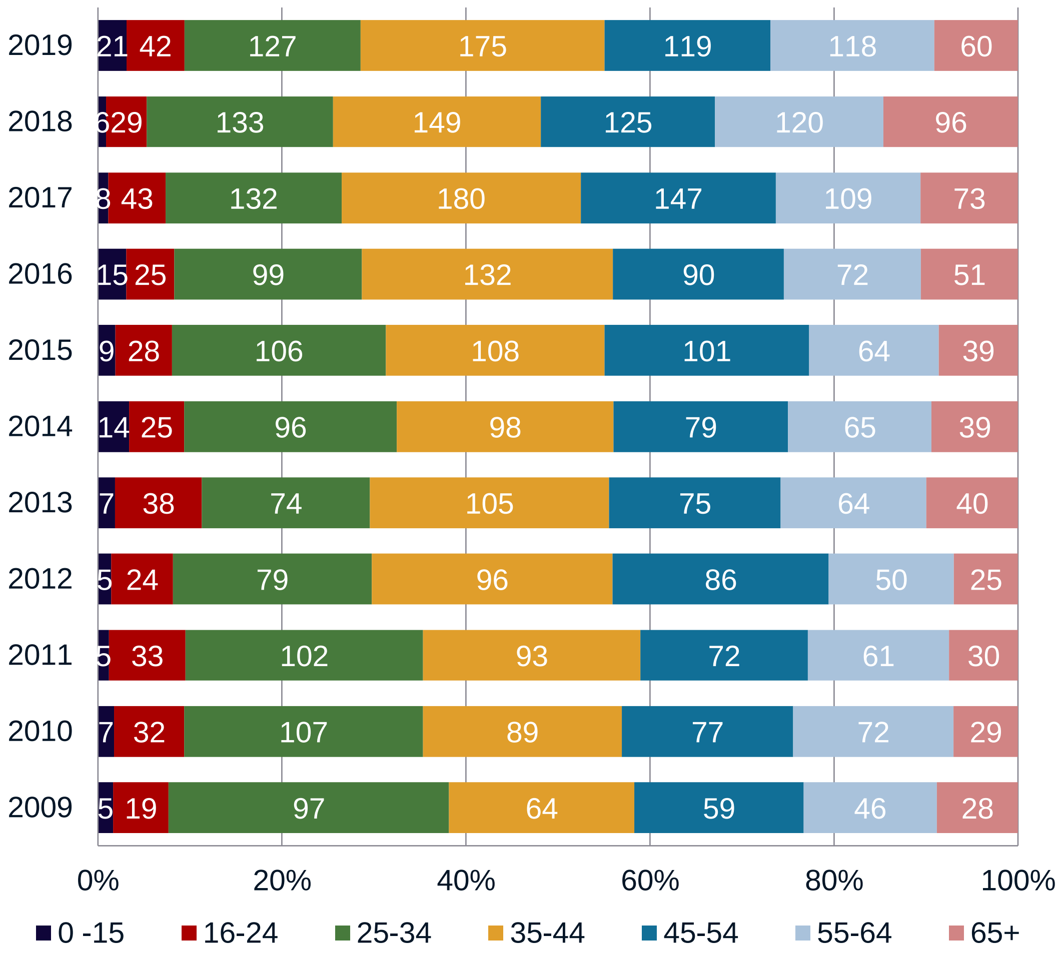
1.3 Visitor demographics: gender and age groups

Gender ratio of visits (2019):



Gender ratio of visits from India by journey purpose (2019):

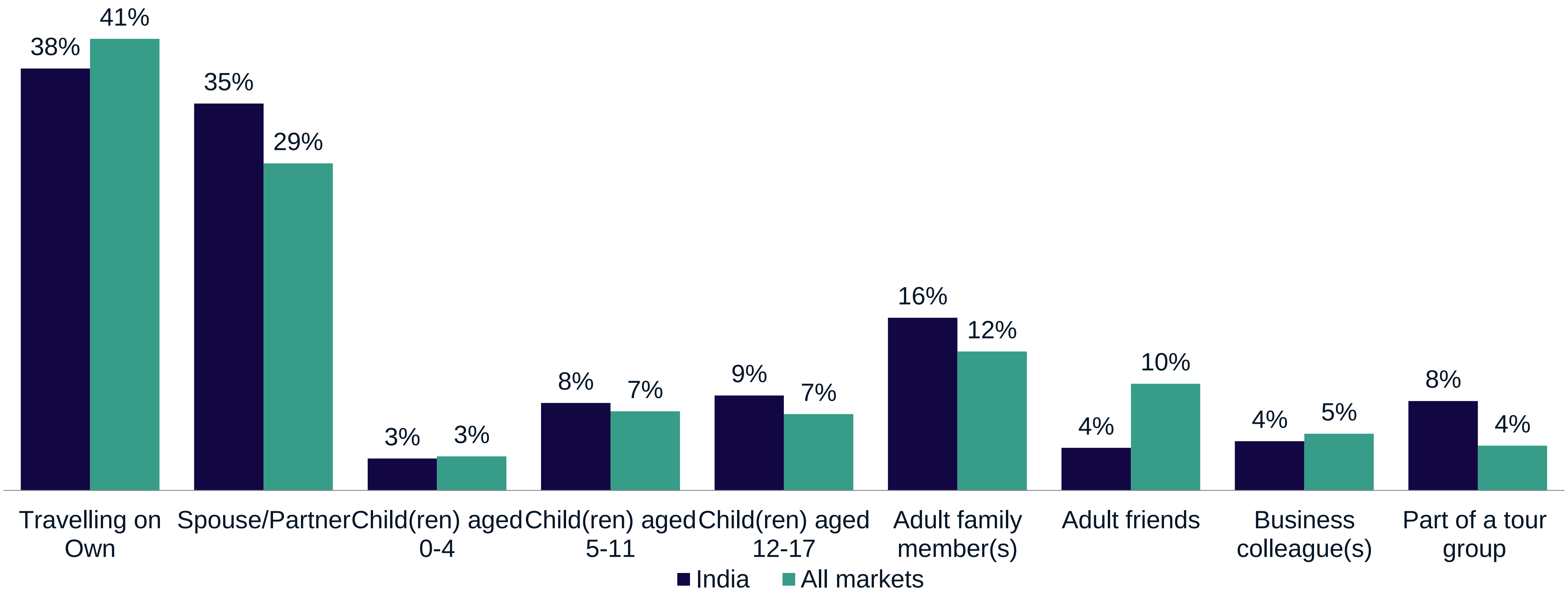
Age group trend (visits in 000s)



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have Indian visitors to the UK travelled with?



Source: International Passenger Survey by ONS, 2017, Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?

1.3 Visitor demographics: Origin

INDIA (cities only)	% OF VISITS FROM INDIA (excluding unknown)	VISITS (000)	NIGHTS (000)	SPEND (£ MILLION)
Ahmedabad	3%	19	347	12
Amritsar	3%	18	406	13
Bangalore	10%	72	1,097	116
Chandigarh	1%	8	227	13
Chennai	7%	49	839	51
Cochin	3%	24	592	29
Delhi (city)	23%	161	2,467	140
Hyderabad	5%	35	854	34
Jaipur	1%	6	131	3
Kolkata	4%	25	462	66
Mumbai	23%	157	2,376	124
Pune	5%	34	635	45
Total where city is known		609	10,433	645
Unknown (regions captured)		79	1,855	6
Unknown		5	69	101
Total India		692	12,356	753

- Over half of the visits to Britain from India were made by people who reside in the state of Maharashtra (around Mumbai and Pune) and in the Delhi area.
- The main urban areas other than Delhi and Mumbai where visitors reside include Bangalore, Chennai and Hyderabad.
- Most of the country, with the exception of some desert and mountain areas in the North, is densely populated, and most of all along the banks of the Ganges in the North.

Source: International Passenger Survey by ONS 2019, CIA World Factbook 2020

1.4 The UK and its competitors (1)

Market size, share and growth potential

- The UK was the 10th most visited destination by Indian travellers on overnight trips in 2019; however, it was the 2nd most visited within Europe (after France).
- The top five destinations for Indian travellers include two markets in the GCC (UAE, Saudi Arabia), two in Southeast Asia (Thailand, Singapore) and the USA.
- Before 2020, the Indian outbound market was booming; global overnight visits from this market grew by 164% from 2009 to 2019.
- However, due to the COVID-19 pandemic, global overnight visits from India shrank by 74%, and visits to the UK declined by 80%. Visits to the UK are forecast to recover to 2019 levels by 2028.
- Among our competitor set of destinations, Spain saw the largest increase in market share between 2009 and 2019, with a growth of 4 percentage points. However, looking further ahead, the US is forecast to see the most growth up to 2029, at +4 percentage points, while the UK is forecasted to lose 3 percentage points of share in that time.

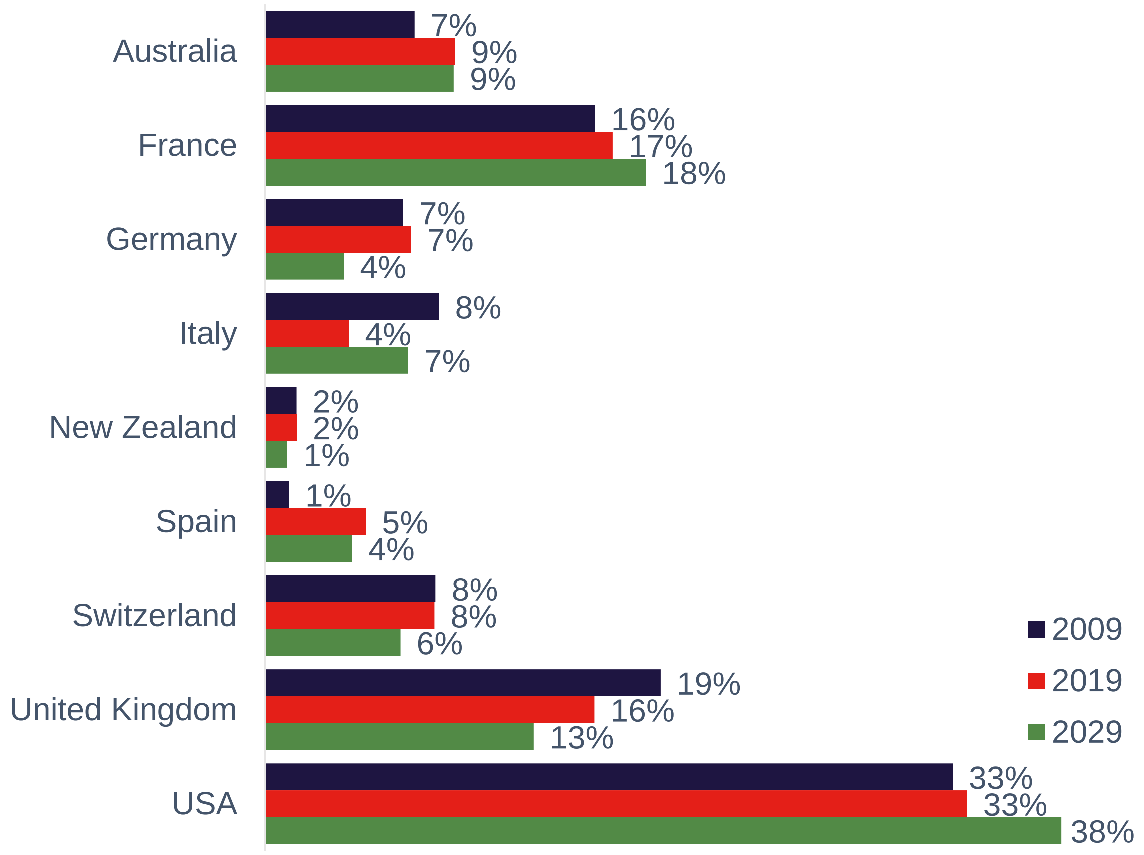
The UK ranked 10th

for Indian outbound overnight visits in 2019

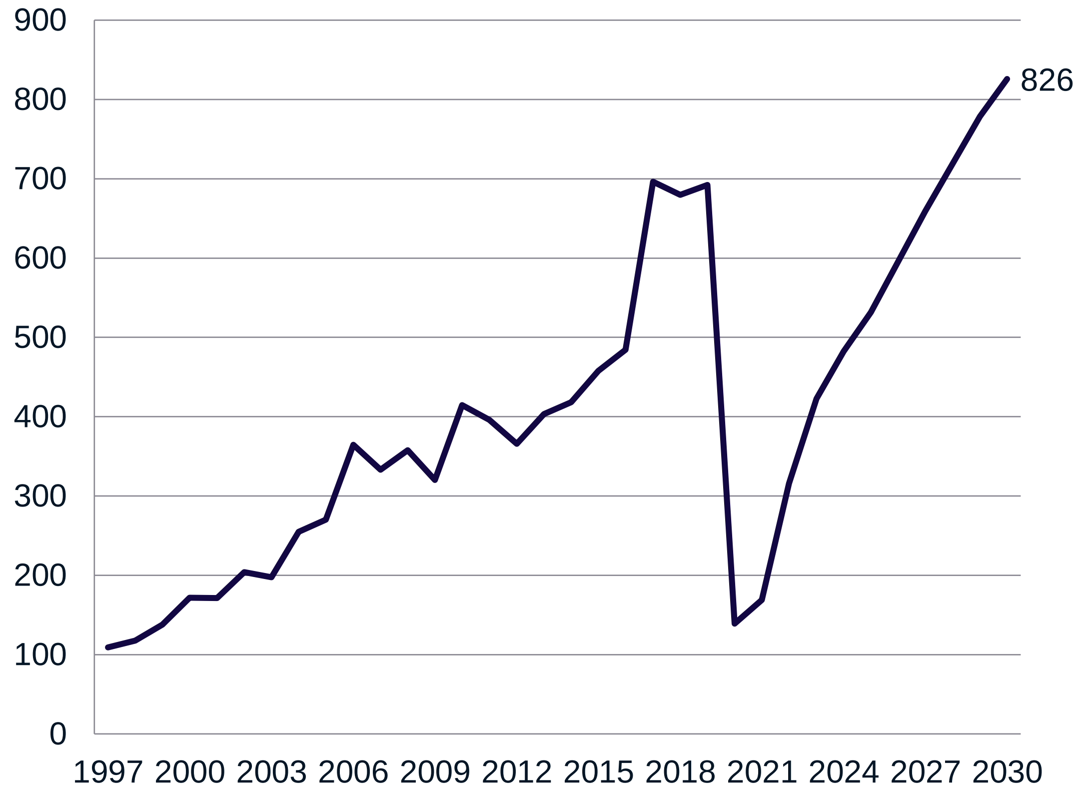
Source: Oxford Economics/VisitBritain

1.4 The UK and its competitors (2)

The UK's market share of Indian visits among competitor set



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations

Experiences and perceptions

Chapter 2

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2.1 Inbound activities: summary

- Dining in restaurants is the number one activity which most visits from India will feature, followed by sightseeing, shopping and visiting parks or gardens.
- Indian visitors like to enjoy the green scenery: they are more likely than the all-market average to visit parks or gardens, or go to National Parks.
- The Indians also have a special interest in watching cricket live in the UK; it is estimated that over 37,000 do so per year*. However, they are less likely than the all-market average to take part in sports related activities themselves.
- Holidaymakers from India are less likely to go shopping in the UK than the average. The items Indian visitors would be most likely to buy would be shoes or clothes.
- Virtually all Indian visitors to the UK felt welcome on their trip and would recommend it for a holiday or short trip.

Top 10 activities for Indian visitors during their visit to the UK

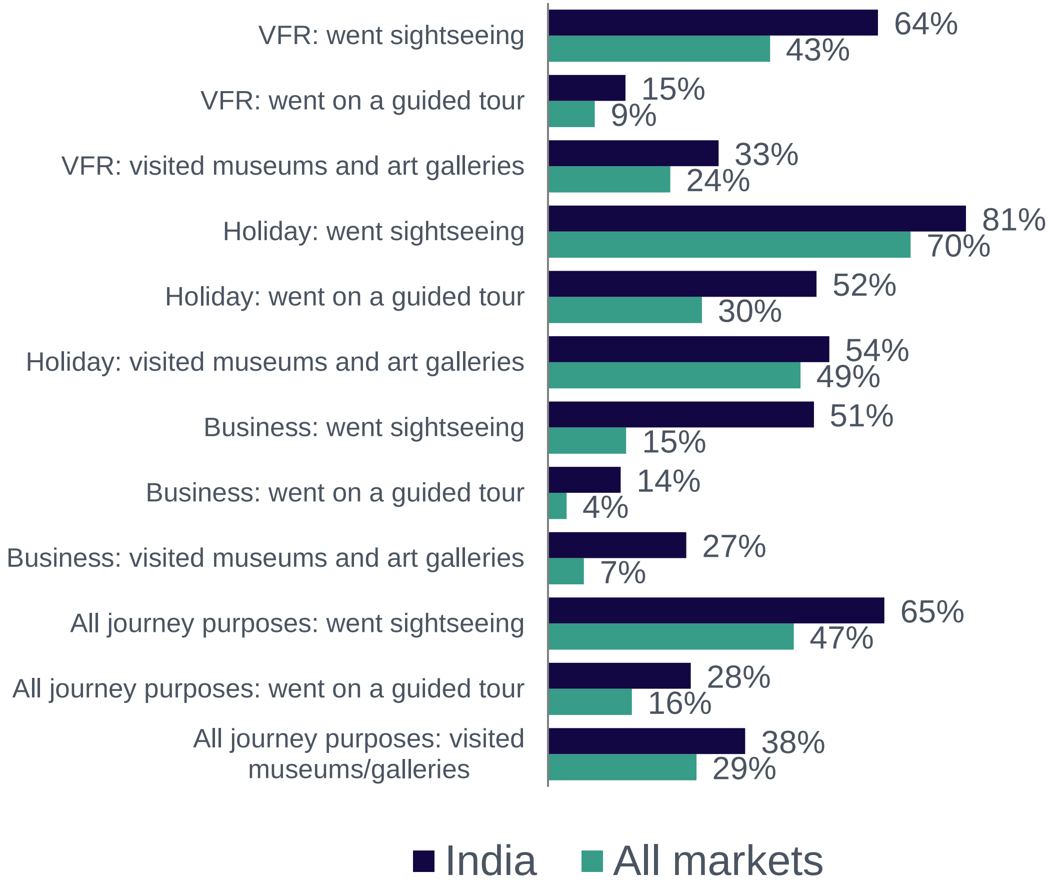
1. Dining in restaurants
2. Sightseeing famous monuments/buildings
3. Shopping
4. Visiting parks or gardens
5. Visiting castles or historic houses
6. Visiting museums or art galleries
7. Visiting religious buildings
8. Going on a guided tour
9. Socialising with the locals
10. Going to the pub

For more information on activities, please visit our webpage of activities undertaken in Britain

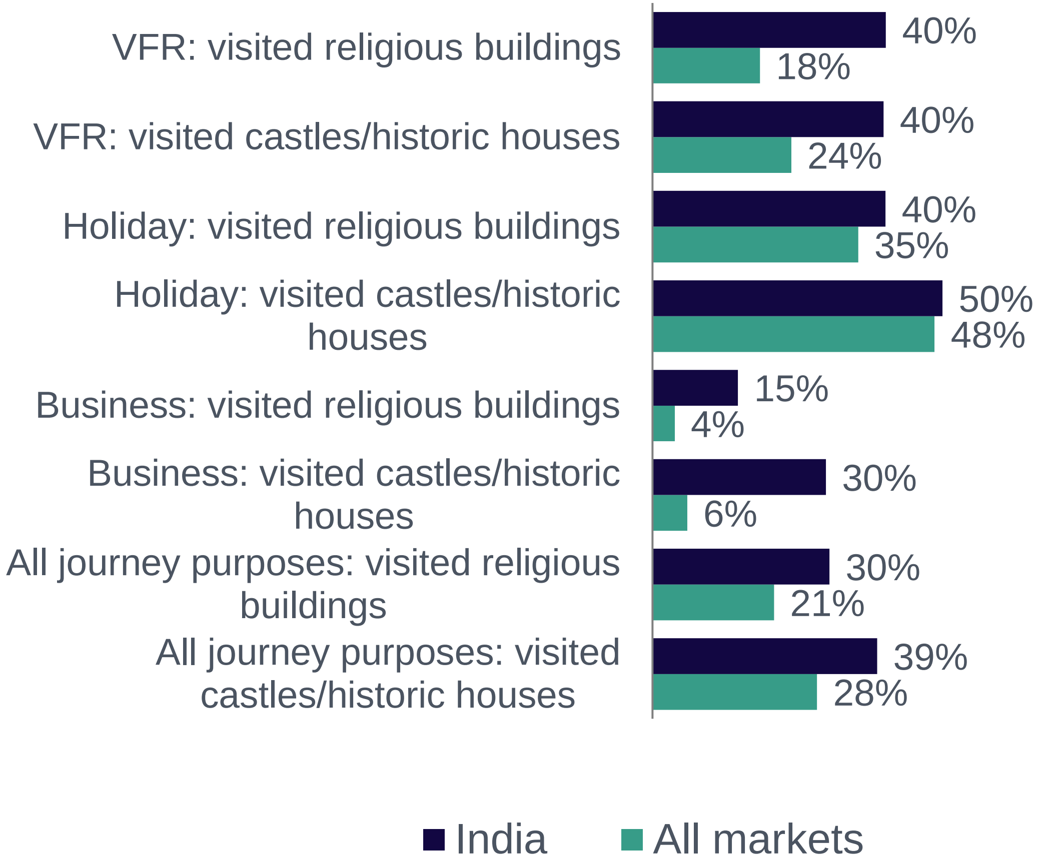
Source: International Passenger Survey by ONS, rankings based on 2006-2019 data, *source data from 2014

2.1 Inbound activities: tourism and heritage

Propensity to visit museums and galleries



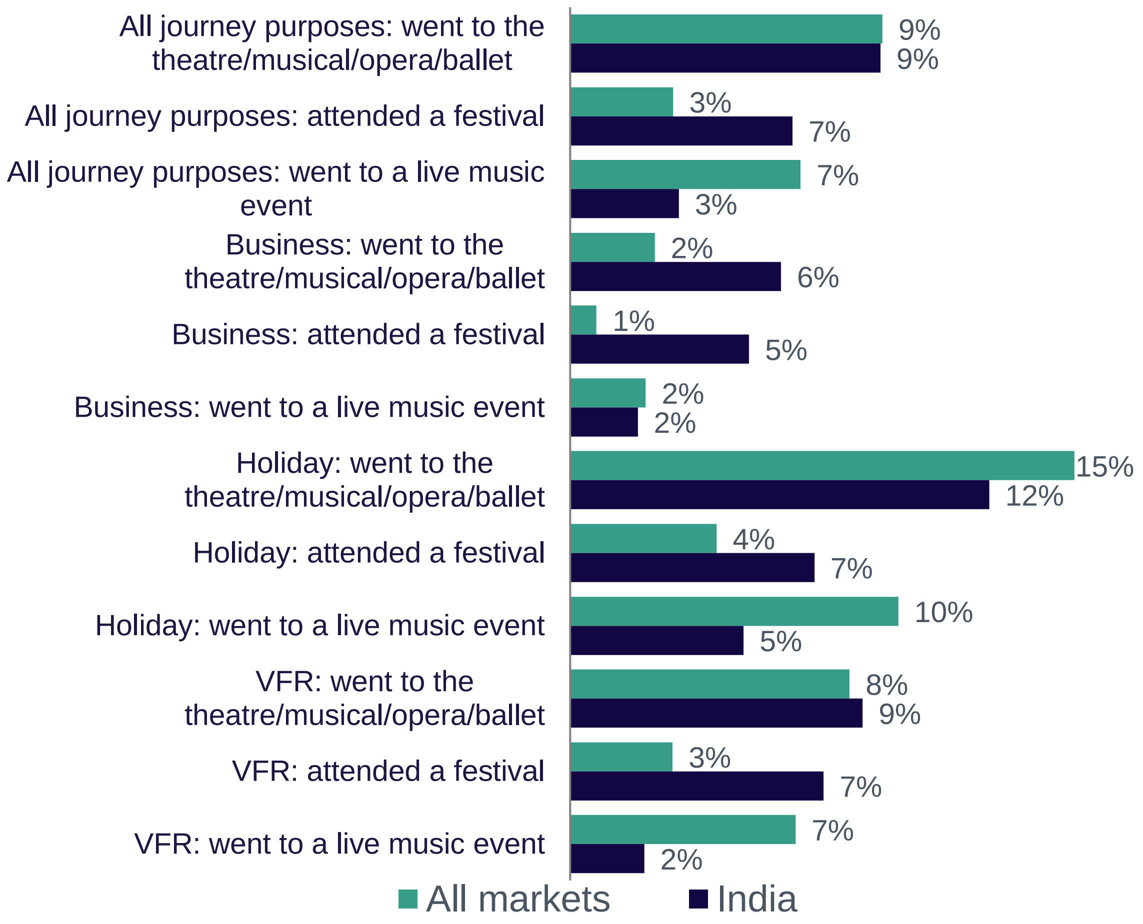
Propensity to visit built heritage sites



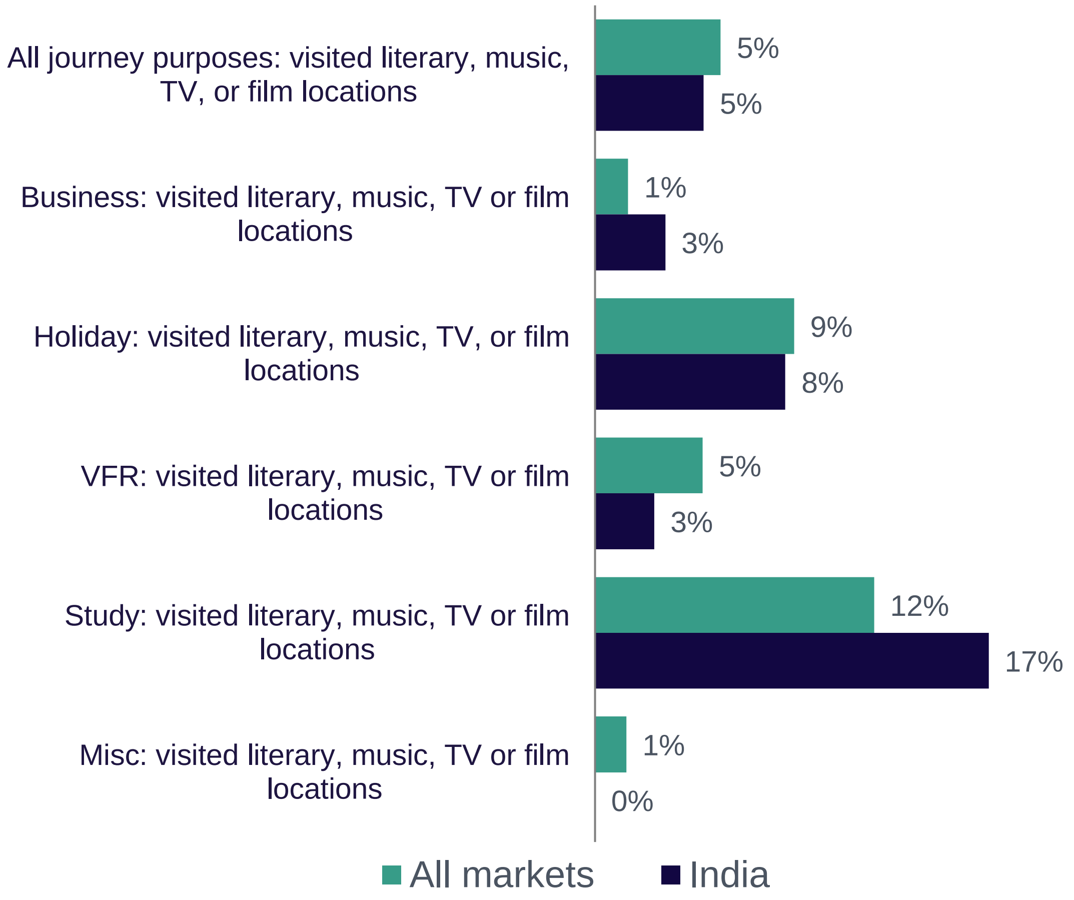
Source: International Passenger Survey by ONS, 2016

2.1 Inbound activities: culture

Propensity to attend the performing arts



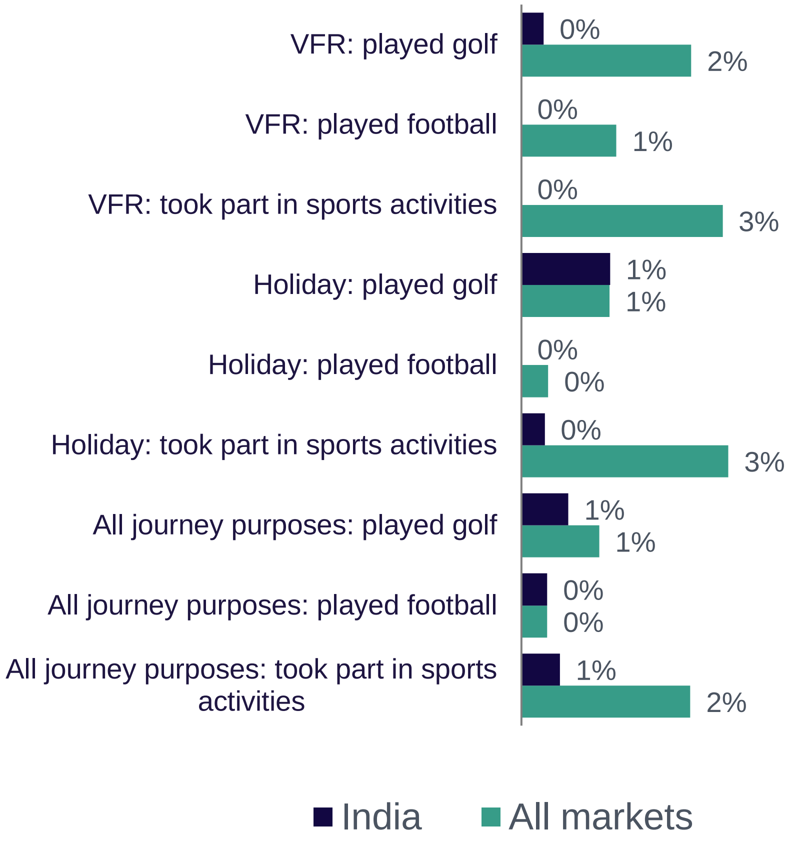
Propensity to participate into other culture-related activities



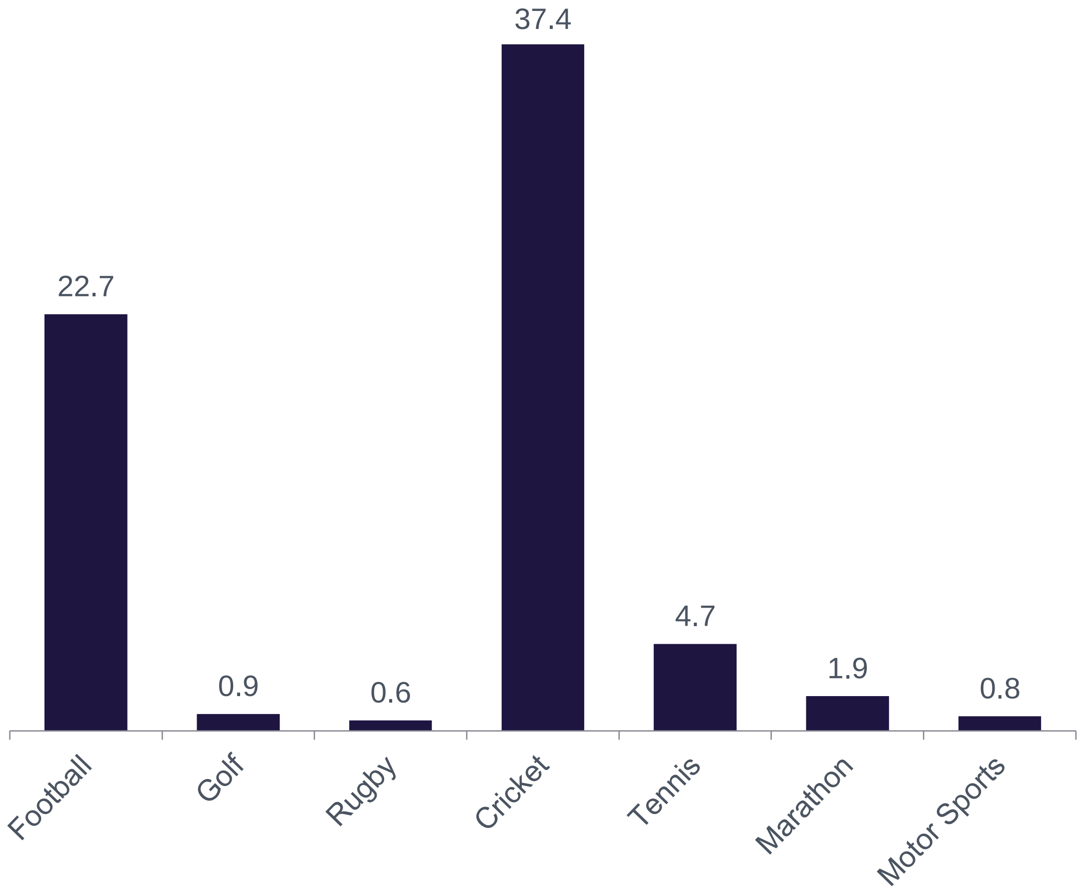
Source: International Passenger Survey by ONS, 2016 & 2017

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



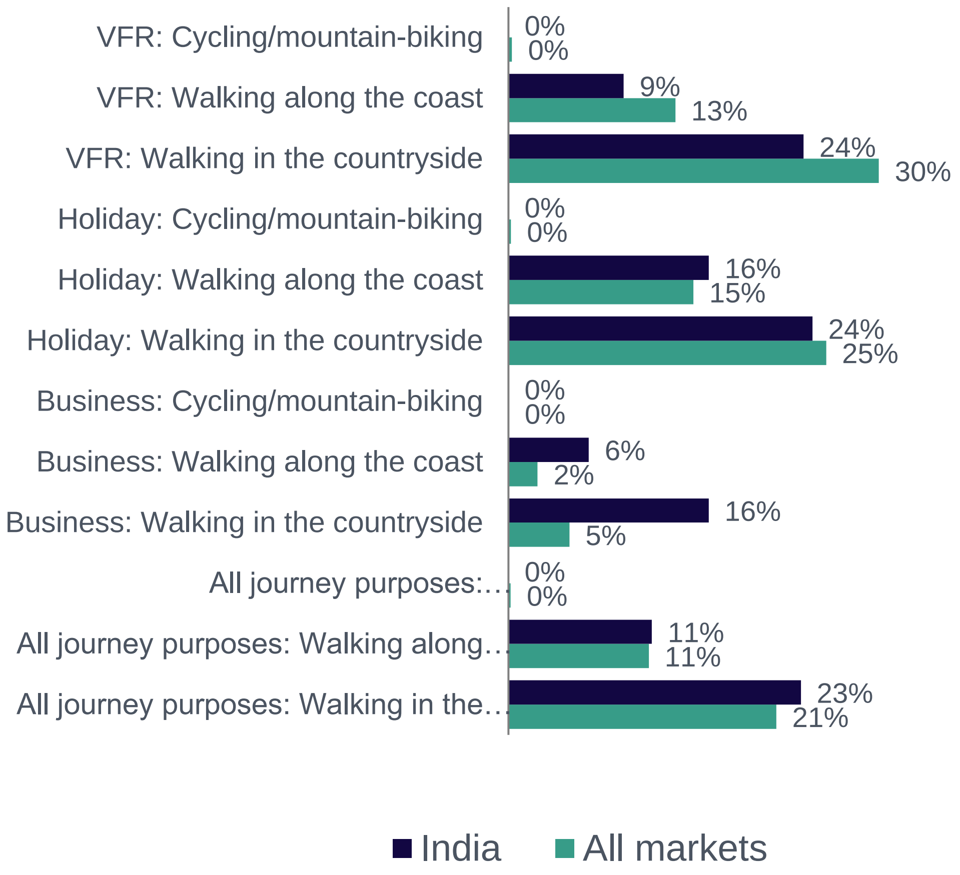
Number who watched sports live during trip (000s)



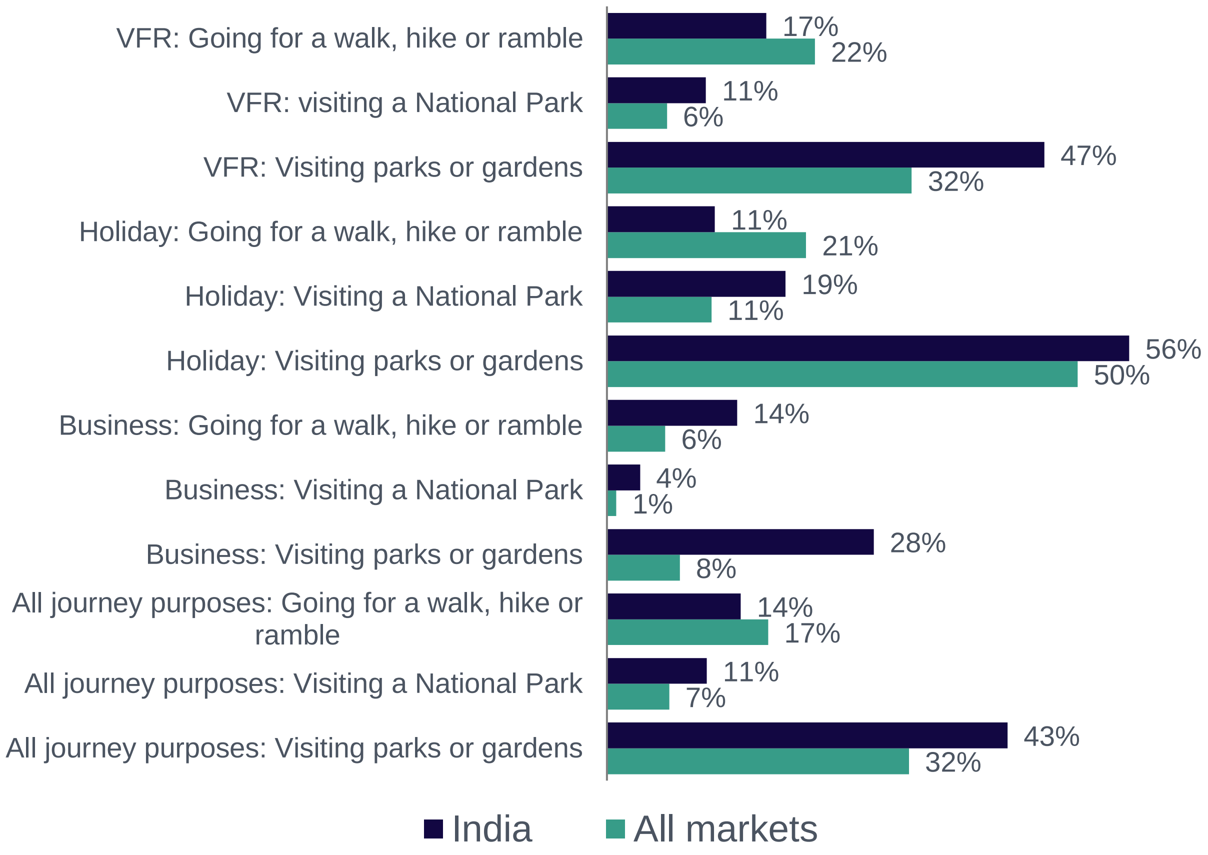
Source: International Passenger Survey by ONS, 2011 & 2014

2.1 Inbound activities: outdoors

Propensity to go for a walk or cycle



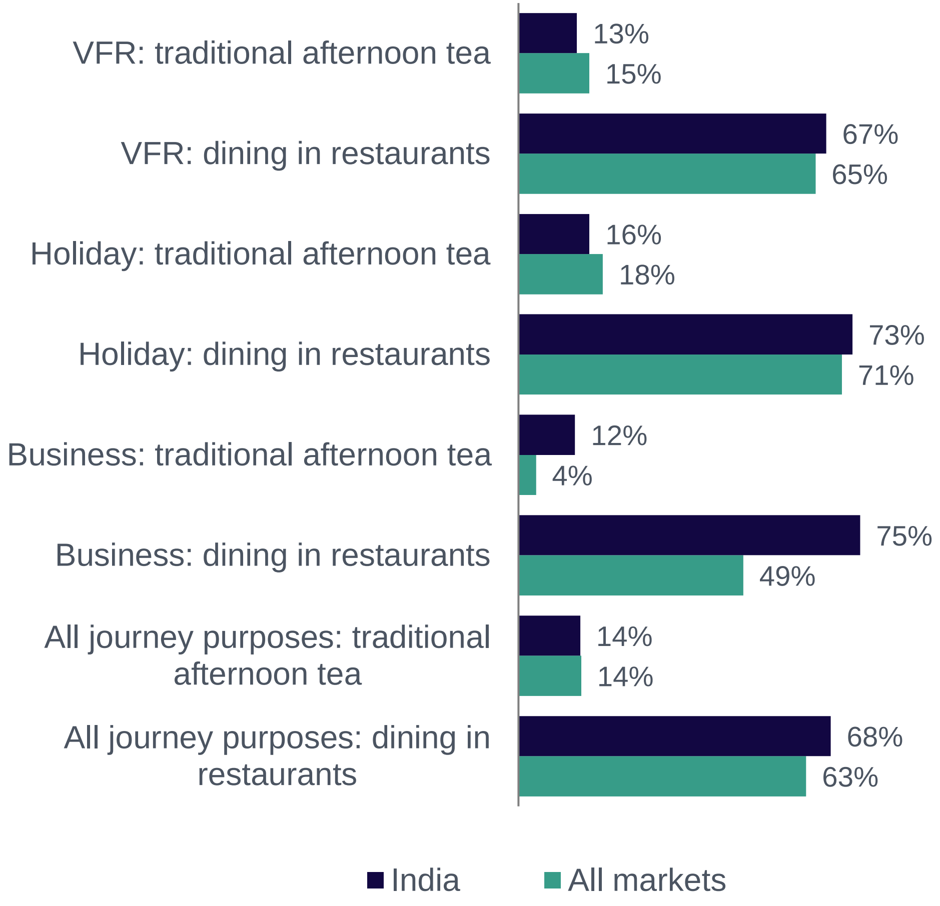
Propensity to enjoy the outdoors



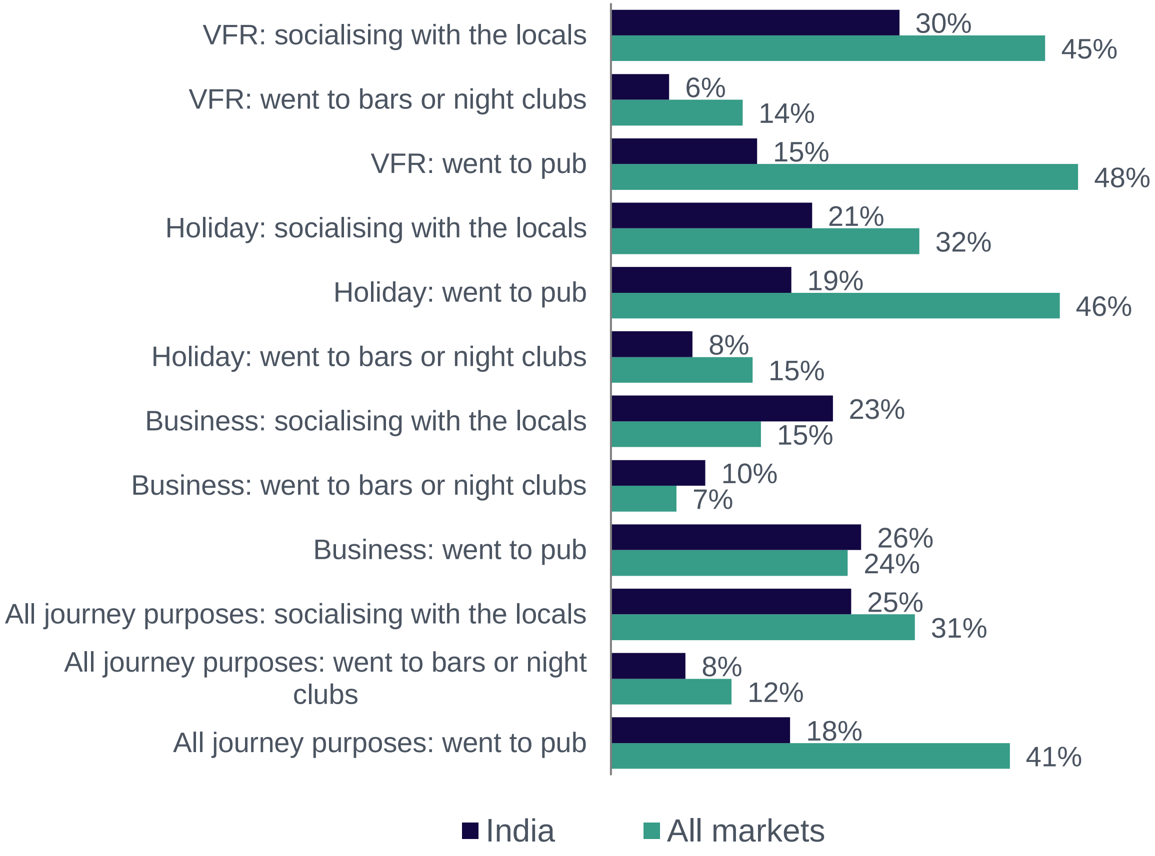
Source: International Passenger Survey by ONS, 2011, 2014, 2016 & 2019

2.1 Inbound activities: going out

Propensity to go to restaurants, or to have a traditional afternoon tea



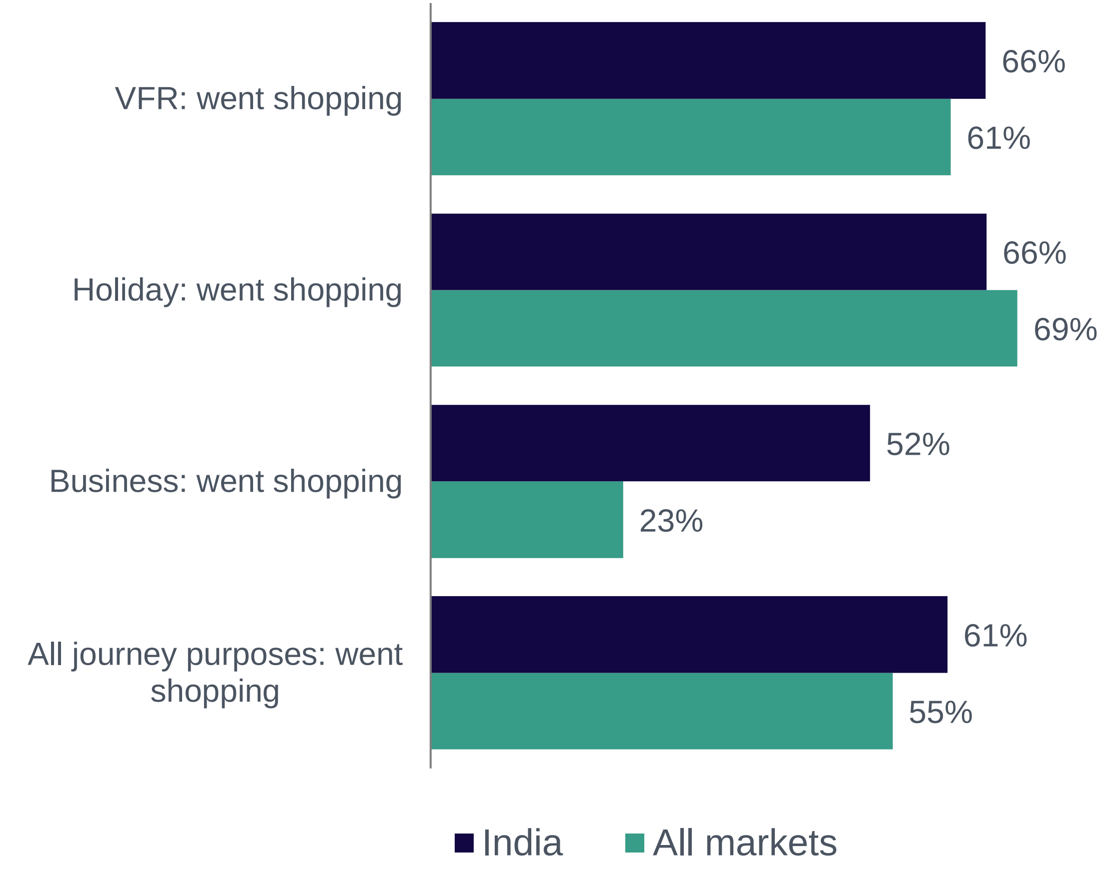
Propensity to go to the pub or bars and night clubs, or to socialise with locals



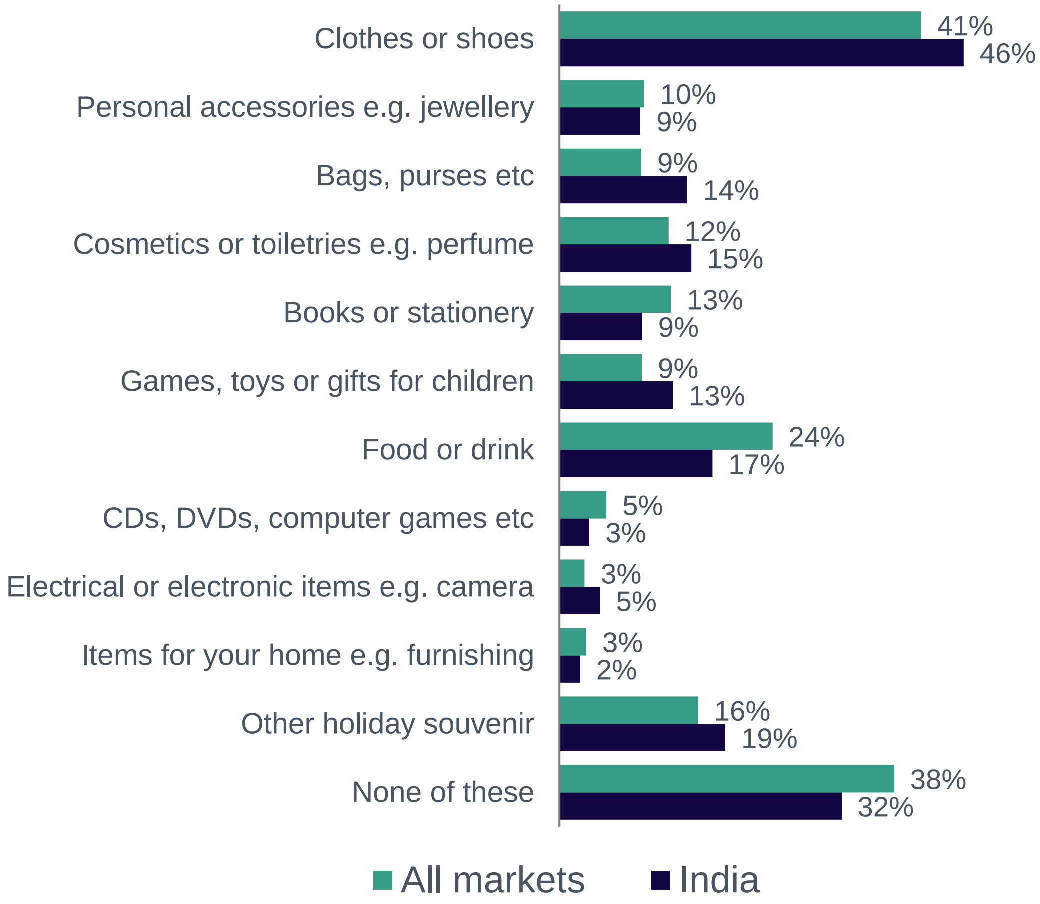
Source: International Passenger Survey by ONS, 2017 & 2019

2.1 Inbound activities: shopping

Propensity to go to shopping



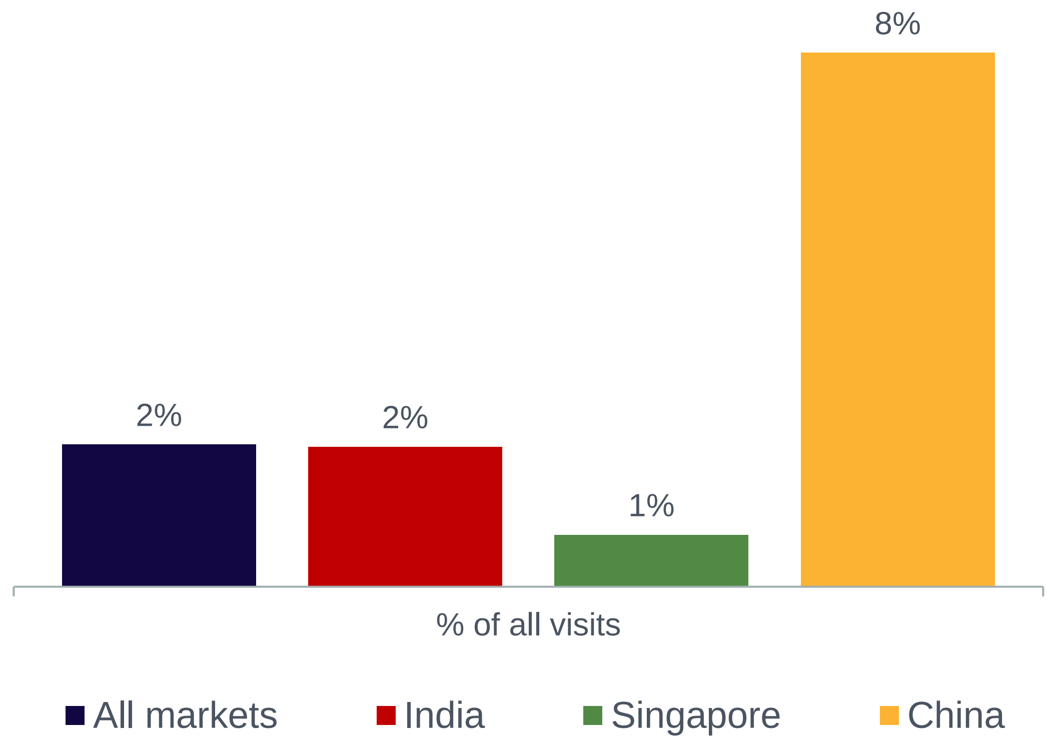
Propensity to purchase selected items



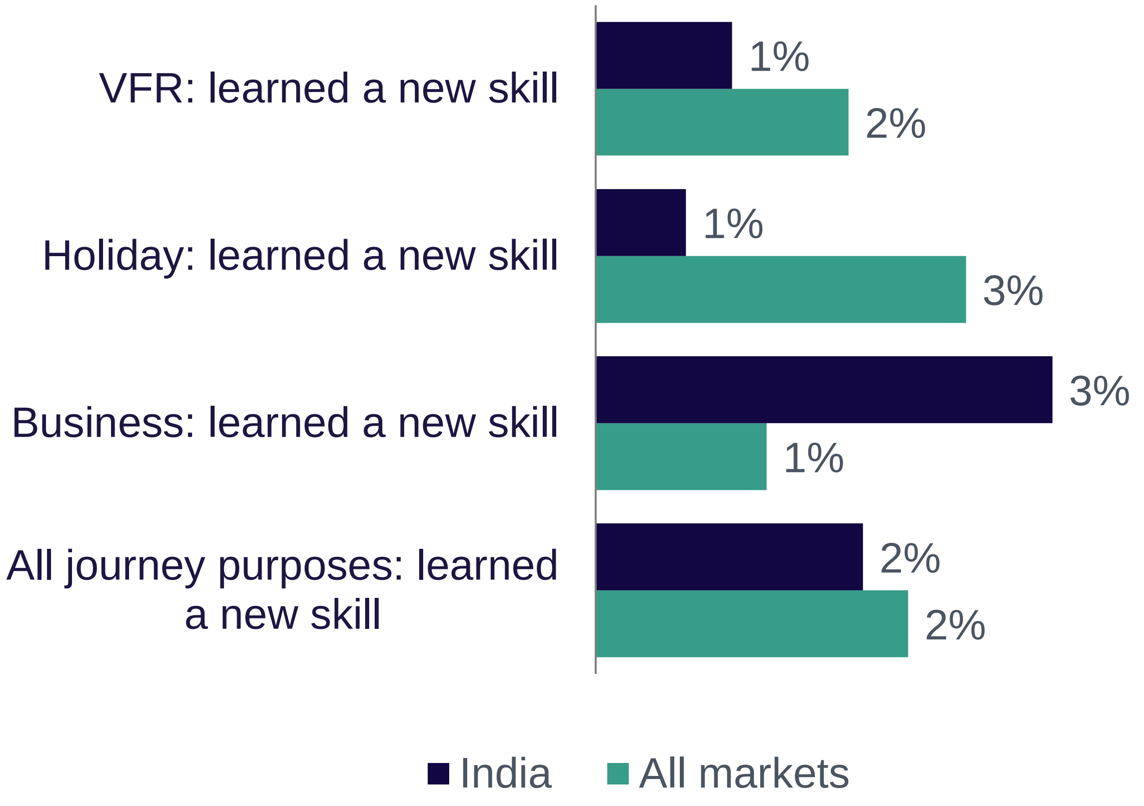
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is yet to be updated given the revision of the 2009-2018 IPS data in May 2020

2.1 Inbound activities: learning

Propensity to participate in an English language course during a visit to the UK



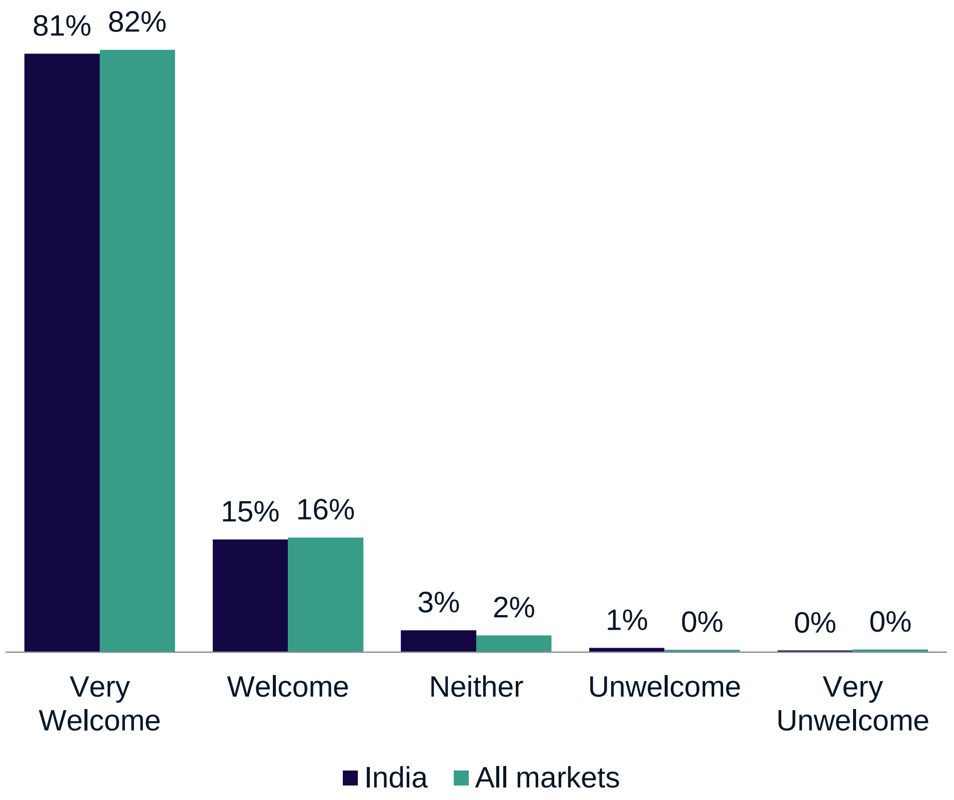
Propensity to learn a new skill or craft



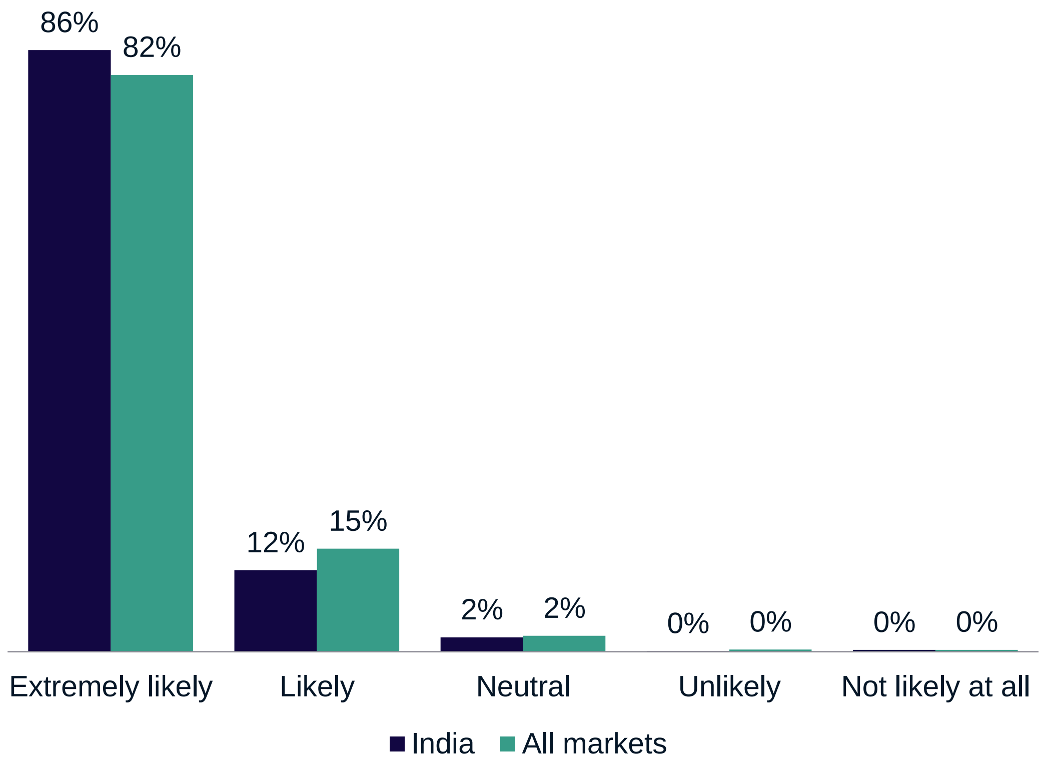
Source: International Passenger Survey by ONS (2018 & 2019), Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.

2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain



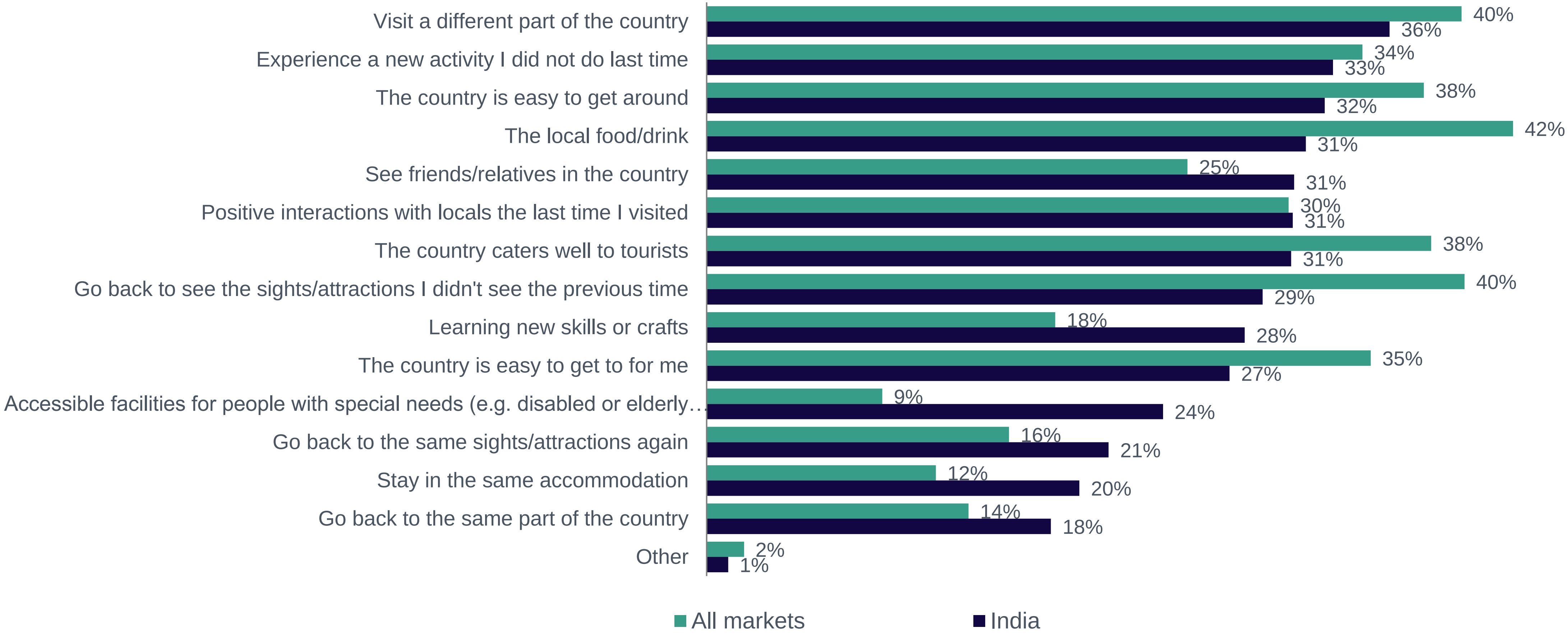
Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017

2.2 Reasons to return to a holiday destination

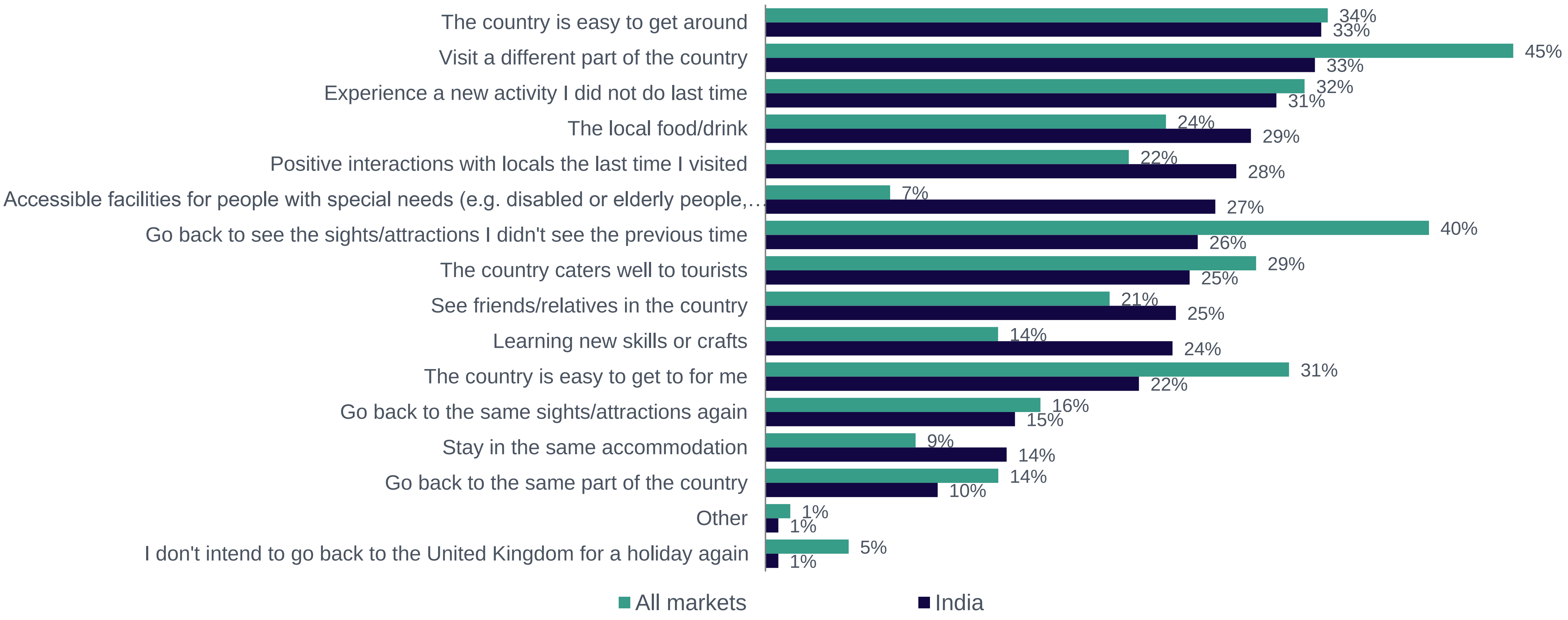
Reasons to return to a destination in general



Source: Anholt Nation Brands Index, powered by Ipsos 2019

2.2 Reasons to return to the UK

Reasons to return to the UK



Source: Anholt Nation Brands Index, powered by Ipsos 2019

2.3 Perceptions of the UK (1)

- Overall, Indians tend to rank Britain highly over other nations. They rank Britain 3rd for its people, rich cultural heritage, contemporary culture, historical buildings/monuments, and for vibrant city life.
- They see Britain as an educational place to visit, associating it mostly with films, museums and music.
- When asked the most important reasons for choosing Britain as a holiday destination, Indian visitors chose the wide variety of places to visit, the countryside/natural beauty, and the climate/weather, followed by cultural attractions and the possibility of visiting friends or relatives, as well as security/safety and the variety and quality of the accommodation options.
- Australia is the destination that Indians consider the 'best place' for delivering what they most want from a holiday: enjoying the beauty of the landscape and feeling connected to nature.
- Areas of strength for Britain include visiting places with a lot of history/historic sites, entertainment/nightlife and visiting world famous sites and places. They also tend to have a strong link with Britain: compared to other destinations (France, Italy, Australia, USA and Germany), they also view Britain as the best place to revisit places of nostalgic importance to them.

Biggest draws for Indian holiday visitors:

Wide variety of places to visit, countryside/ natural beauty, and climate

Source: Arkenford 2013, VisitBritain/IPSOS 2016, Anholt Nation Brands Index, powered by Ipsos, 2020

2.3 Perceptions of the UK (2)

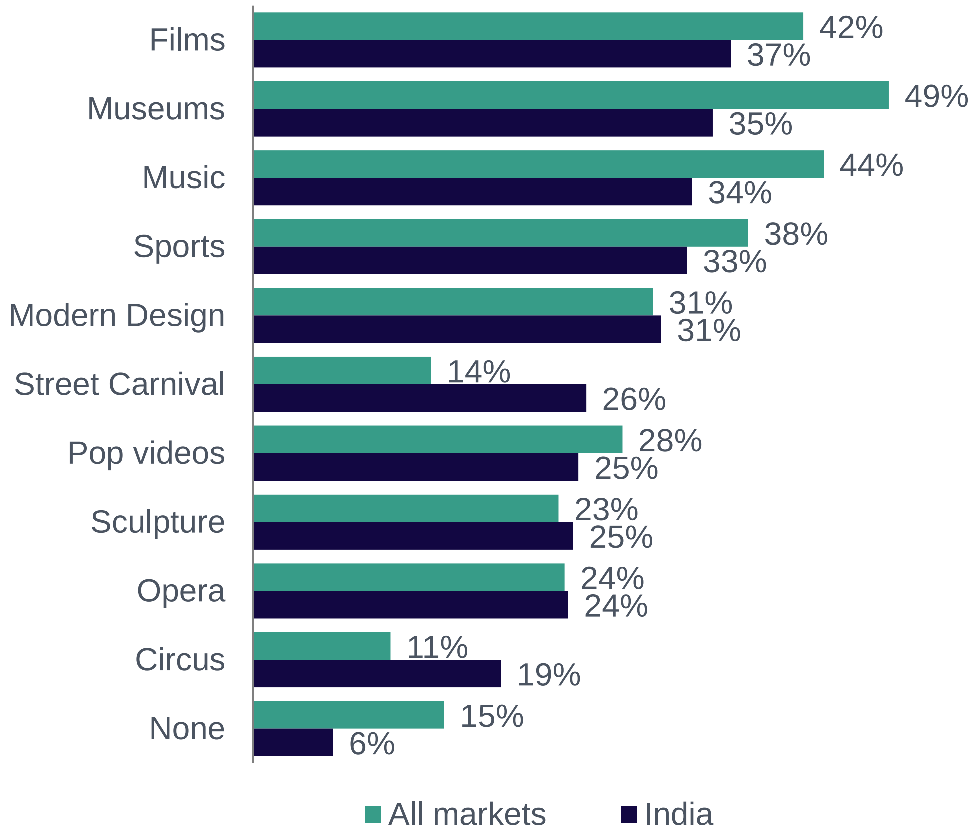
UK’s ranking (out of 50 nations)

Measure	Indian respondents	All respondents
Overall Nation Brand	**4**	**2**
Culture (overall)	**4**	**3**
The country has a rich cultural heritage	3	6
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	3	4
The country excels at sports	8	3
People (overall)	**3**	**4**
If I visited the country, the people would make me feel welcome	4	11
Tourism (overall)	**4**	**4**
Would like to visit the country if money was no object	6	5
The country is rich in natural beauty	7	23
The country is rich in historic buildings and monuments	3	5
The country has a vibrant city life and urban attractions	3	4

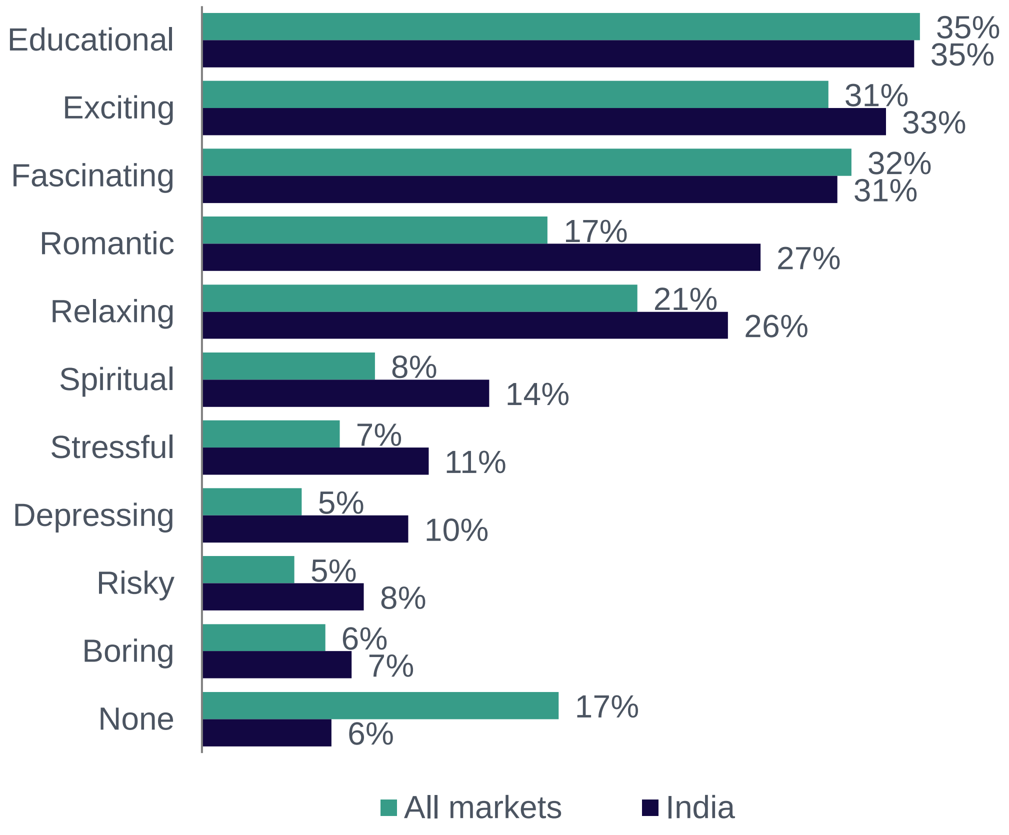
Source: Anholt Nation Brands Index, powered by Ipsos 2020

2.3 Perceptions of the UK (3)

Cultural associations



Adjectives describing a potential trip to the UK



Source: Anholt Nation Brands Index, powered by Ipsos 2020

2.3 Perceptions of the UK (4)

Holiday wants and % saying destination is best place for… top 20

Importance	Perception	GB	FR	IT	AU	US	GE
6.18	Enjoy the beauty of the landscape	45%	47%	42%	59%	42%	29%
6.13	Feel connected to nature	45%	39%	40%	50%	37%	25%
6.1	Offers good value for money	41%	37%	35%	49%	53%	29%
6.09	Do something the children would really enjoy	51%	43%	35%	60%	68%	34%
6.07	Have fun and laughter	29%	29%	22%	36%	53%	10%
6.07	Enjoy peace & quiet	30%	41%	37%	43%	34%	25%
6.06	See world famous sites and places	55%	51%	48%	42%	60%	35%
6.05	The people are friendly and welcoming	43%	41%	37%	45%	60%	34%
6.02	Be physically healthier	47%	45%	38%	56%	54%	37%
6.01	It offers unique holiday experiences	48%	50%	46%	57%	61%	38%
6	A good place to visit at any time of year	40%	41%	36%	54%	56%	30%
5.99	Provides a wide range of holiday experiences	50%	45%	39%	59%	67%	34%
5.94	Explore the place	31%	39%	49%	56%	42%	36%
5.93	Experience things that are new to me	37%	31%	31%	44%	50%	27%
5.89	Broaden my mind/ Stimulate my thinking	45%	48%	33%	49%	61%	37%
5.87	Enjoy high quality food and drink (gourmet food)	41%	48%	49%	49%	59%	29%
5.86	Enjoy local specialities (food and drink)	39%	48%	50%	36%	46%	17%
5.8	Have dedicated time with my other half	47%	59%	49%	58%	59%	38%
5.79	Experience activities/places with a wow factor	40%	46%	47%	56%	55%	29%
5.77	Easy to get around by public transport	52%	37%	30%	44%	57%	36%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (5)

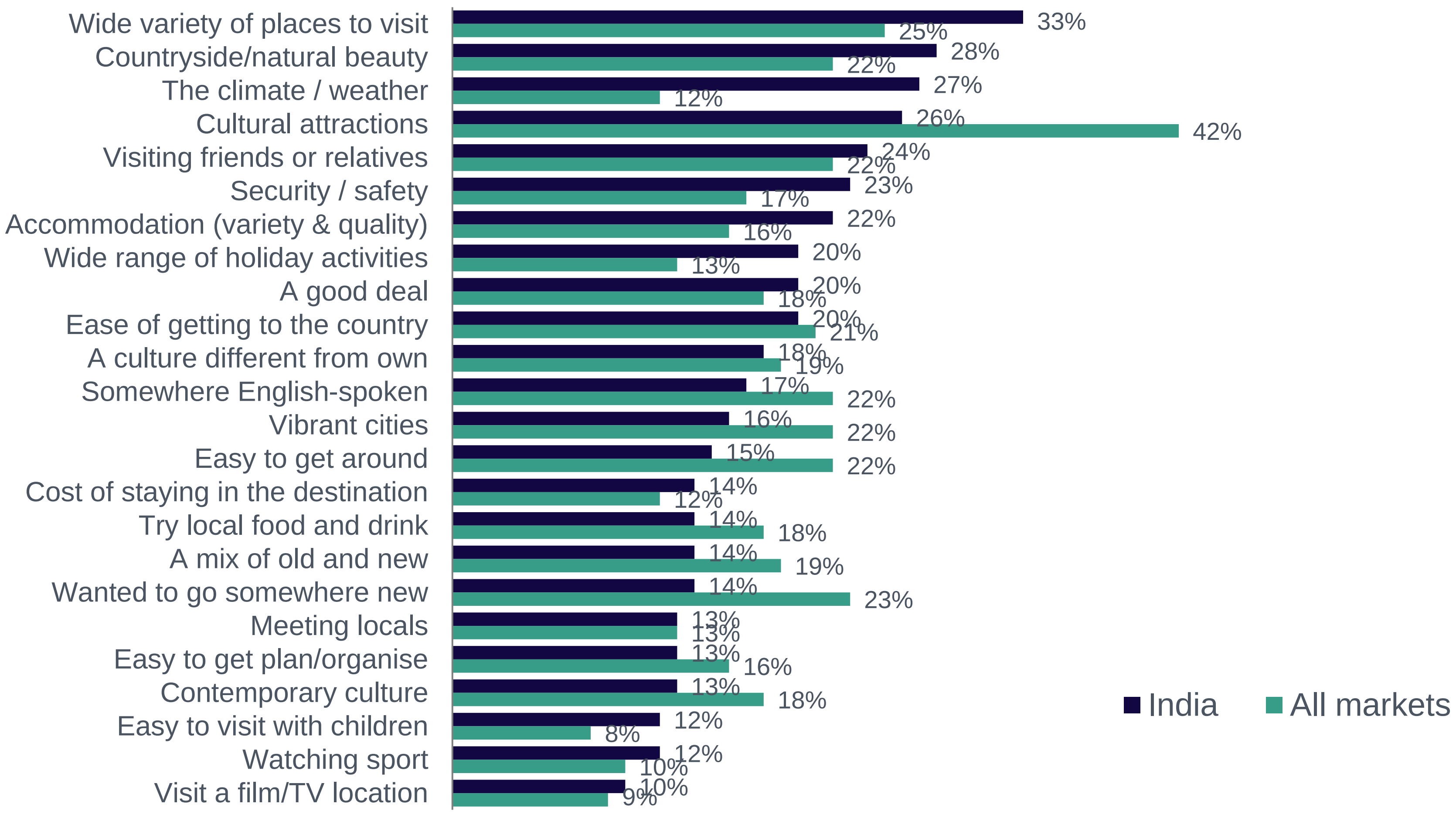
Holiday wants and % saying destination is best place for… bottom 20

Importance	Perception	GB	FR	IT	AU	US	GE
5.7	Do something environmentally sustainable/ green	27%	22%	29%	47%	59%	22%
5.68	Visit a place with a lot of history/historic sites	59%	55%	55%	37%	43%	45%
5.67	Good shopping	39%	51%	31%	45%	65%	33%
5.65	Do what I want when I want spontaneously	28%	40%	20%	43%	58%	24%
5.59	Chill/ slow down to a different pace of life	37%	40%	33%	47%	51%	21%
5.57	Visit places important to my family's history	39%	39%	29%	37%	43%	28%
5.57	Revisit places of nostalgic importance to me	51%	32%	45%	37%	45%	25%
5.49	Soak up the atmosphere	40%	41%	22%	42%	48%	41%
5.43	Meet and have fun with other tourists	34%	5%	17%	44%	64%	34%
5.41	Go somewhere that provided lots of laid on entertainment/nightlife	55%	50%	41%	63%	69%	38%
5.33	Party	40%	49%	39%	56%	65%	34%
5.32	Meet the locals	23%	52%	57%	44%	69%	40%
5.3	Feel special or spoilt	37%	40%	33%	50%	55%	23%
5.26	Get some sun	45%	29%	32%	58%	54%	29%
5.24	To participate in an active pastime or sport	36%	37%	26%	55%	41%	26%
5.23	Fashionable destination	47%	61%	44%	41%	62%	29%
5.21	Experience adrenalin filled adventures	29%	29%	39%	38%	48%	18%
5.16	Do something useful like volunteering to help on a project	53%	38%	41%	49%	46%	32%
5.12	Get off the beaten track	28%	43%	24%	62%	44%	31%
5.07	Watch a sporting event	43%	33%	26%	55%	51%	29%

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (6)

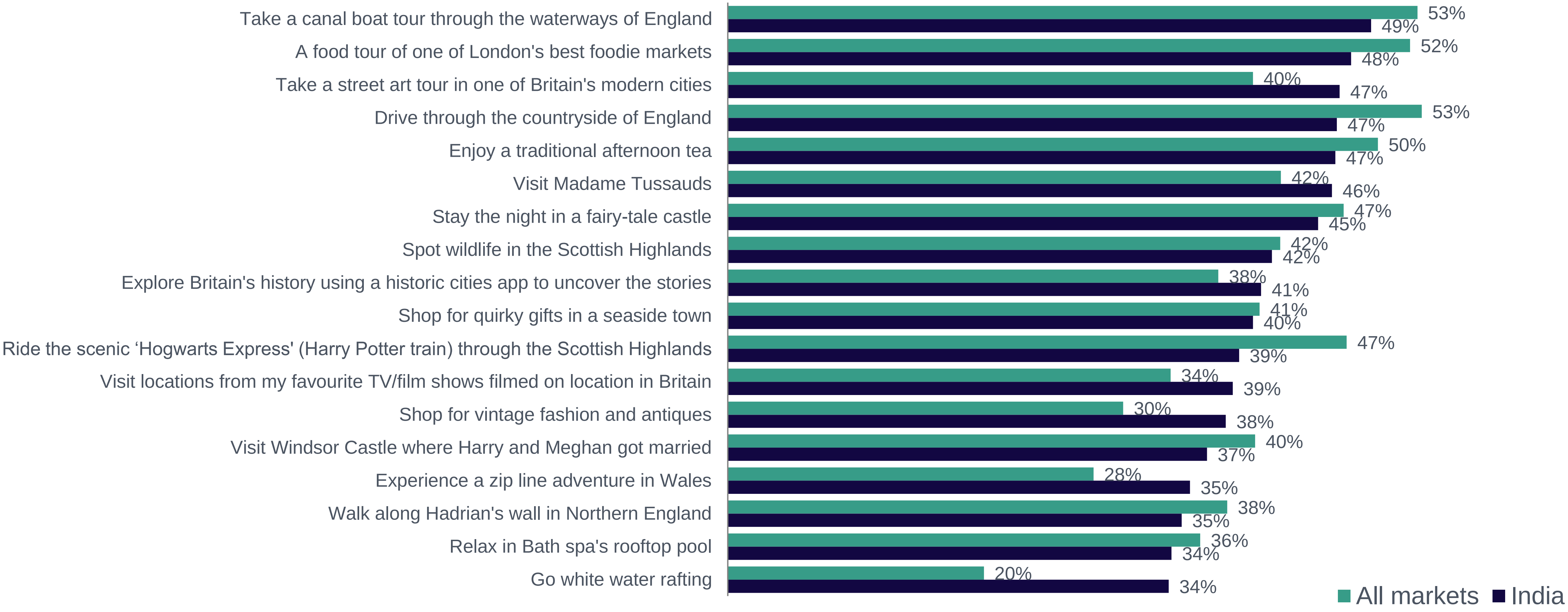
Motivations for choosing Britain as a holiday destination



Source: VisitBritain/IPSOS 2016, adjusted data, base: visitors (Market scores have been adjusted so that the sum of all motivations for each market is equivalent to the global total, to enable meaningful comparisons)

2.3 Perceptions of the UK (7)

Sought-after Britain activities – top 18



Source: Anholt Nation Brands Index, powered by Ipsos 2020; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets

2.3 Perceptions of the UK (8)

Sought-after Britain activities – bottom 17

Source: Anholt Nation Brands Index, powered by Ipsos 2020; Rankings based on market-level scores that have been adjusted so that the sum of all activities for each market is equivalent to the all-market total, to enable meaningful comparisons, including across markets

Understanding the market

Chapter 3

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3.1 Structural drivers

- India is the second-most populated country in the world with 1.4bn inhabitants. It is also among the 10 largest countries in the world. India boasts mega-cities – Delhi and Mumbai are in the top 5 most populated in the world and most of the country is densely populated. However, only just over 1-in-3 people live in a city. Despite the service sector driving economic growth, half of the population work in agriculture, and the overall average income is still quite low.
- The country is vast, so it is difficult to talk about one India only. Cultures, but also languages and economic activities, vary across states. India became a federal parliamentary republic in 1950. Strong links with British culture inherited from the colonial period have remained. English is very important: it has the status of a subsidiary official language but is widely used for national, political and commercial issues.
- There are a minimum of 12 paid holidays in India; public holidays vary according to the region. On average, only a low share of household income is spent on services, including recreation/leisure.
- India’s GDP contracted by 7% in 2020 due to the coronavirus pandemic; however, the recovery trajectory has so far been more positive than expected.

1.4bn

Indian population

Source: Oxford Economics, CIA World Factbook 2021, McKinsey ‘Urban World: Global Consumers to watch’, Thomson Reuters‘ Practical Law

3.1 Structural drivers: general market overview

- As of 2019, India was the world's fifth fastest growing economy, and third largest in terms of purchasing power parity. The World Bank observes that India's 'long term GDP growth has become more stable, diversified and resilient'. The Indian economy has seen significant progress since the early 1990s when economic liberalisation was initiated.
- India's GDP has a 17% contribution from agriculture, fishing and forestry, and 29% comes from industry (the bulk of which is services, which is the sector which most drives growth).
- India is expected to become a high middle income country by 2030.
- India's economy saw a profound negative impact due to the coronavirus pandemic, seeing its worst slump since 1996. India imposed one of the world's strictest lockdowns in 2020, disrupting business and boosting unemployment.
- However, a combination of festive demand, a receding coronavirus wave and positive vaccine developments signalled a positive shift towards the end of 2020. Oxford Economics forecasts a favourable outlook for 2021, but recovery will be relatively slow.
- India is home to the world's largest COVID-19 vaccine drive, with the government aiming to inoculate 300 million citizens before August 2021.

Key demographic and economic data

Measure (2020)	India
Population (m)	1.4bn
GDP per capita PPP (US$)	6,240
Annual average GDP growth over past decade (%)	5.2
Annual average GDP growth in 2020 (%)	-8.1

Economic indicators (%)

Indicator	2019	2020	2021	2022
Real GDP growth	4.7	-7.0	11.8	6.1
Real consumer spending growth	6.7	-9.1	11.3	6.3
Unemployment rate	6.0	10.1	7.3	6.5

Source: Oxford Economics, CIA World Factbook 2021, BBC, Nasdaq

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	2020
Population growth rate (2021)	+1.0%
Predicted growth rate from 2020 to 2024	+3.8%
Urban population	35%
Urbanisation rate (2015-2020)	2.4% per annum

Indicator	2010	2020	2030	2040
Median age (in years)	25.1	28.4	31.7	35.0

- With almost 1.4 billion inhabitants, India is the second most populated country in the world, after China. It is forecast to overtake the latter by 2024.
- The Indian population is still very young at the moment. However, its median age is forecast to increase from 28.4 years old in 2020 to 31.7 years old in 2030 and 35.0 by 2040.
- Just over a third of the population lives in urban areas (35% in 2020). Most of the country, with the exception of some desert and mountain areas in the North, is densely populated – especially along the Ganges in the North. The main urban areas include Delhi, Mumbai, Kolkata, Bangalore, Chennai and Hyderabad.
- India still has some challenges in education to face: the literacy rate* is an estimated 78% (compared to 97% in China). However, basic sanitation coverage rose from 38.7% in 2014 to 98.9% in 2019.
- Capgemini's World Wealth Report suggests that in 2019, India ranked 12th globally for its HNWI volume**, with 256,000 HNWIs.

Source: Oxford Economics, UN revised World Population Prospects, CIA World Factbook 2021, Capgemni World Wealth Report 2019, Hindustan Times
* percentage of the population aged 15 and over that can read and write;
** HNWI stands for High Net Worth Individual, definition in appendix

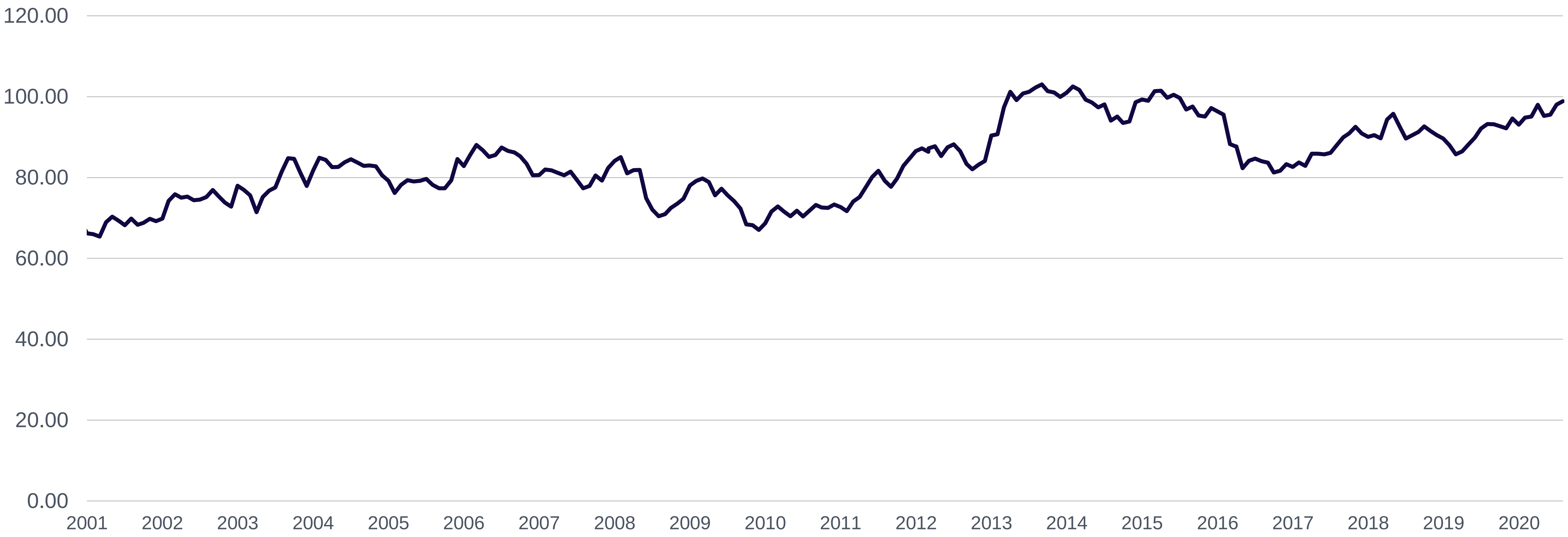
3.1 Structural drivers: India-UK relationship

- India and the UK have longstanding ties spanning hundreds of years, and a strong partnership between the two countries continues to this day.
- The United Kingdom has an Indian population of over 1.5 million; the largest of any diaspora and dubbed a 'living bridge'. This Indian diaspora contribute 6% to the UK's GDP, and there are 850 Indian companies operating in the UK, employing over 100,000 people.
- Interest in coming to the UK is strong from India: there are more UK visa centres in India than anywhere else in the world. Also, in 2019, Indians emerged as the fastest growing nationality of UK student visa applications. There was a 93% increase in Study visas granted to Indian students in 2019 compared to the previous year.
- When it comes to diplomatic activity, the UK has more diplomatic posts in India than any other government, with eight missions, compared to five for each of the next highest countries. Key areas of this partnership include trade, defence, and security.
- Bilateral trade between the two countries has prospered recently. India is the UK's sixth largest non-EU trading partner, with the relationship supporting more than 500,000 UK jobs.
- Looking to the future, representatives from India and the UK met in summer 2020 to explore opportunities for an enhanced trade partnership and subsequently a free trade agreement. Talks aimed at working towards removing additional barriers, and working together to ensure that both countries maximise the potential of their digital economies. As of February 2021, the groundwork was still being laid to cement this deal.
- At the start of the COVID-19 pandemic, the UK and India co-drafted the G20 COVID-19 action plan, aimed at funding vaccine development, slowing the spread of the disease around the world and managing economic damage.

Source: British High Commission New Delhi, Hindustan Times, Grant Thornton, LiveMint, VFS Global, House of Commons Foreign Affairs Committee paper 'Global Britain & India', UK Government

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in INR)



Please find the most up-to-date exchange rate trend based on monthly averages on our website.

Source: Bank of England

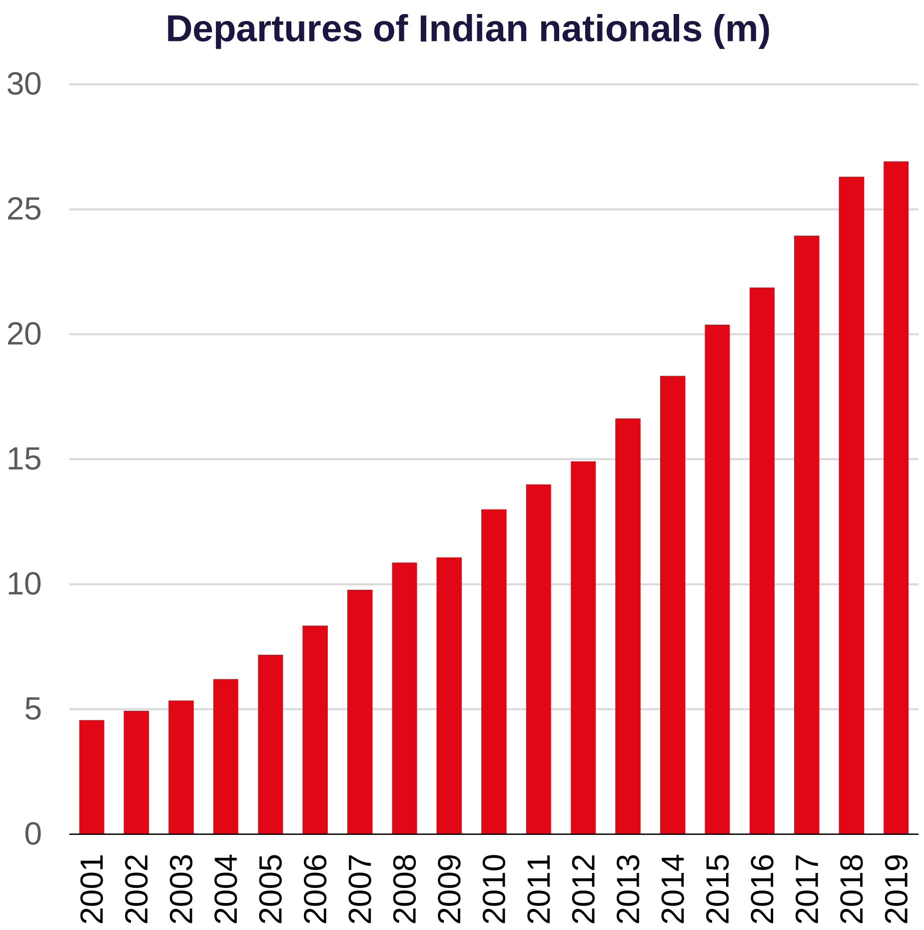
3.2 Consumer trends

- The Indian outbound market shows signs of growth in both volume and spend.
- According to the latest report from the Indian Ministry of Tourism, outbound departures of Indian nationals reached 26.9m in 2019, after many years of consistent growth.
- In 2019 international tourism expenditure in India reached US$22.9 billion, ranking 15th globally.
- Bookings for long-haul travel from India are still mainly influenced by travel agents. However, online sources of information and social media already play a key role in the decision process. As mobile data access takes over on using laptops or desktops, the travel market is slowly transitioning towards more online transactions.
- Rapid growth in demand for international holidays has been seen in recent years from Tier 2 and Tier 3 cities, meaning that travel operators should be prepared to meet the particular needs of these new travellers.
- Total visits from India to the UK were estimated to be down by 80% in 2020 due to the COVID-19 pandemic.
- However, sentiment research reveals strong travel sentiment from India, with 92% of Indian respondents 'definitely' or 'probably' considering taking an international leisure in the next 12 months. Europe is also popular, but Britain faces strong competition within the continent to attract post-pandemic travellers.

26.9m
Indian nationals departures in 2019

Source: UNWTO, Oxford Economics, India Tourism Statistics 2020, BCG/Google 'Demystifying the Indian online traveler', TCI/VisitBritain/VisitScotland/VisitWales/London&Partners February 2021

3.2 Consumer trends: overall travel trends pre COVID-19



- Up to 2019, both domestic tourism and outbound tourism in India were booming according to official data. However, domestic tourism is still growing at a faster pace than the volume of outbound departures.
- With a growing middle class, Indian nationals were travelling more and more. Word-of-mouth is very important and they try to liaise with people they know or use recommendations from friends or relatives in the country they intend on visiting.
- International tourism expenditure has also increased in recent years, with the value of this outbound market having more than doubled between 2010 and 2019 (USD10.5bn and USD22.9bn respectively).
- An increasing trend towards dual or multi-purpose travel is being observed among Indian outbound travellers. For example, Indian VFR travellers often extend travel plans to include independent leisure time and activities. Business travellers are also combining business and leisure (bleisure) on their trips abroad.
- Indian travellers have traditionally gone on holiday in family groups, often with extended members of the family. However, this is changing as growth in outbound travel is being drive by millennials, who prefer travelling with friends or alone. Noticeably, solo female travel and all-female groups are an emerging trend in India, especially among younger, urban professional women who are exploring more adventurous locations.

Source: India Tourism Statistics 2020, UNWTO, BCG/Google 'Demystifying the Indian online traveler', ETC Snapshot of Indian Outbound Travel Market

3.2 Consumer trends: travel from tier 2 and tier 3 cities

- Travellers across age groups from smaller towns in India are increasingly opting for foreign holidays, driving growth and sales for travel operators.
- Thomas Cook, SOTC and MakeMyTrip have reported that some 30-40% of their business comes from tier 2 and 3 towns and cities. Apparently, growth from these towns and cities is much higher than in the largest cities year on year.
- Especially highlighted are Lucknow, Visakhapatnam, Coimbatore, Trichy and Nagpur.
- Increased disposable income, as well as improved airport infrastructure and air connectivity have been identified as reasons for this trend. Also, aspirations for international travel are spurred by social media thanks to rocketing smartphone penetration.
- Compared to travellers from metro cities, travel operators warn that visitors from smaller towns may require heightened service in terms of overseas assistance, itinerary briefings, pick up, drop-offs and food preference support. And language barrier continues to be a major concern.

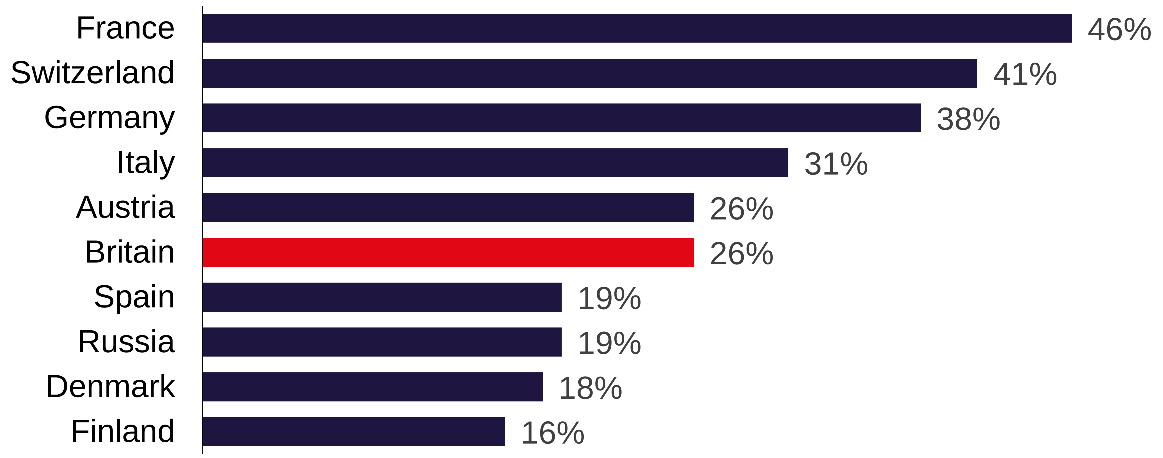
According to visa services provider VFS global:

- Demand for delivery of doorstep visas across India grew by 144% in one year after the service launched in 2016
- The highest number of applications processed by VFS global in 2018 was in Nagpur, followed by Indore
- Highest demand for doorstep visa delivery came from Goa, Lucknow, Nagpur, Bhubaneswar, Mangaluru and Gurgaon
- Smaller cities registered a demand for destinations like Dubai, Southeast Asia, Europe, Egypt and Australia

Source: LiveMint, Times of India

3.2 Consumer trends: impact of COVID-19

Top European destinations for an international leisure trip*



Key activators for an international leisure trip

	India	All markets
Hygiene and safety protocols in place at destination	49%	34%
The availability of a vaccine/treatment against coronavirus	40%	41%
A significant decrease in coronavirus cases at destination	36%	38%
Your government's advice on international travel	36%	26%
An attractive offer e.g. discounts on flights or accommodation	32%	27%

- Due to the COVID-19 outbreak, visits from India to the UK decreased by 42% in the first three months of 2020 compared to those months in 2019**, and Oxford Economics estimates that total visits were down by 80% throughout the year.
- The first wave of VisitBritain's International Recovery Sentiment tracker (fieldwork 2nd-16th December 2020) reveals strong travel sentiment from India, with 92% of Indian respondents 'definitely' or 'probably' considering taking an international leisure in the next 12 months.
- Of these, 42% are considering travelling to Europe, and 11% are considering Britain. Britain is only ranked sixth within Europe for consideration, demonstrating the competition that the UK faces from other nearby destinations.
- Indian travellers' top activators for an international trip vary slightly from the all-market average, with more importance placed on hygiene and safety protocols, deals and discounts, and particularly government advice on international travel (a difference of 10 percentage points vs. the global trend).

Source: IPS, Oxford Economics/VisitBritain, TCI/VisitBritain/VisitScotland/Visit Wales/London&Partners February 2021 *percentages show proportion within those considering a trip to Europe **provisional data for January-March 2020, latest statistics at time of writing. Note: Sentiment data is from a tracking study, and results may change in subsequent waves

3.3 Booking and planning

- Many Indian holiday visitors start thinking about their trip early with almost half doing this as early as half a year or more in advance.
- However, later steps in the booking process show shorter lead-times than the all-market averages.
- Over 7-in-10 Indian visitors decided on Britain as their destination between 1 and 6 months in advance of travelling, compared to 57% for all markets.
- Two thirds of Indian visitors booked within two months of travelling, versus about half for all markets.
- Slightly more Indian visitors booked their travel face to face than the global average. They are also more likely to stay with friends or relatives than average.
- Overall, Indian visitors are more likely to book an activity in the UK than the all-market average and more would do so before their trip rather than during.

66%

of Indian visitors booked their trip to Britain within two months of travelling

Source: VisitBritain/IPSOS 2016

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	India	All markets
Online	77%	85%
Face-to-face	14%	10%
By phone	6%	4%
Don't know	2%	1%

- Indian travellers are more likely than the global average to book their holiday face to face (14% vs. 10%), and tend to demonstrate a stronger affinity to brick and mortar travel agents compared to other markets. They are also slightly more likely to book via phone, and this is particularly emphasised when booking accommodation.
- More Indians stay with friends/relatives than the global average.

How trips to Britain were booked: accommodation only

Booking method	India	All markets
Online	67%	70%
Face-to-face	7%	6%
By phone	6%	3%
Did not book/stayed with friends/relatives	20%	18%
Don't know	0%	2%

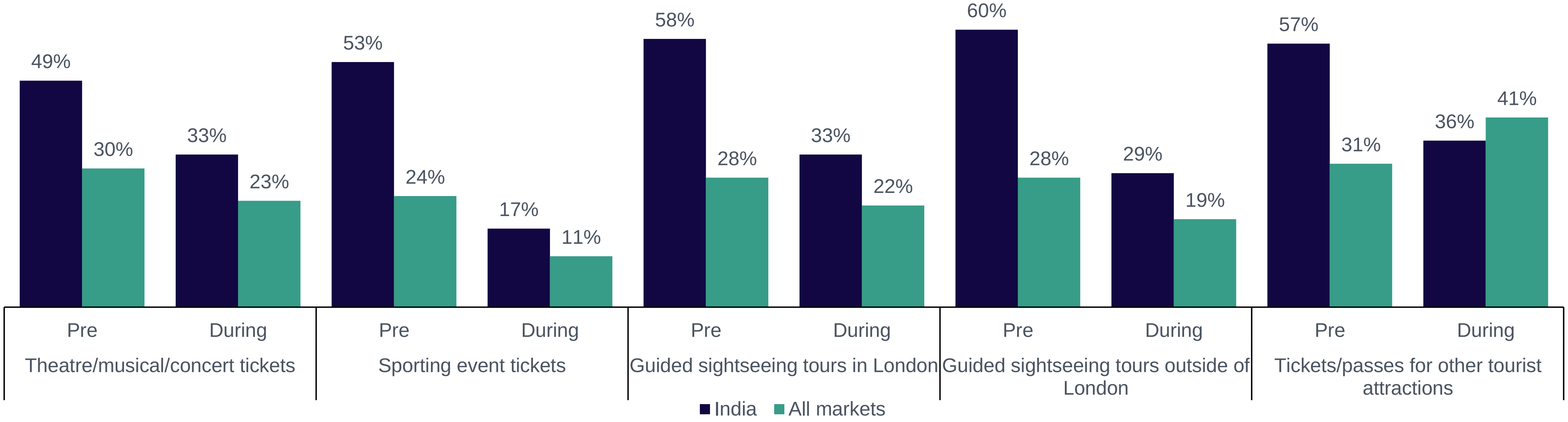
How trips to Britain were booked: travel + accommodation

Booking method	India	All markets
Online	76%	64%
Face-to-face	16%	26%
By Phone	8%	9%
Don't know	0%	1%

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip



- Indian visitors are more likely to book an activity in the UK before their trip than during. They are more likely than the all-market average visitor to have bought activities to undertake in Britain.
- The most popular activities bought are tickets or passes to other tourist attractions and guided sightseeing tours in or out of London.

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	India	All markets
6+ months	48%	49%
3-6 months	34%	31%
1-2 months	12%	13%
Less than 1 month	4%	5%
Don't know	2%	3%

Deciding on the destination

Lead time	India	All markets
6+ months	18%	32%
3-6 months	46%	38%
1-2 months	27%	19%
Less than 1 month	7%	7%
Don't know	2%	3%

Looking at options/prices

Lead time	India	All markets
6+ months	12%	21%
3-6 months	30%	37%
1-2 months	40%	27%
Less than 1 month	15%	12%
Don't know	3%	4%

Booking the trip

Lead time	India	All markets
6+ months	10%	14%
3-6 months	20%	32%
1-2 months	35%	28%
Less than 1 month	32%	21%
Don't know	3%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

Decision lead-time for visiting Britain: commentary (tables on previous page)

- Almost half of Indian holiday visitors tend to start thinking about their trip to Britain early: 48% started to think about going on holiday more than half a year in advance. A further 34% of them did so between three and six months ahead of their trip. This compares to a similar 49% and 31% respectively across all markets.
- However, while Indian visitors started to think about their trip roughly at the same time as the all-market average, they had a shorter lead time for deciding on their destination, looking at options and booking.
- 46% of Indian visitors decided on Britain as their destination between 3 and 6 months in advance of travelling; and 27% did so only one to two months ahead of their journey. On average across all markets, a total of 57% of visitors to the UK did so in the same time frame (1-6 months).
- 70% of Indian visitors researched options and prices between one and six months before travelling, compared to a global average of 64%.
- Finally, two thirds of Indian visitors booked within two months of travelling, versus about half for all markets.
- About half of bookings are made through travel agent/ tour operators/travel comparison websites rather than direct with the carrier.

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 Reaching the consumer

- Print media is still very important in India, especially in top- and lower-tier cities. Tour operators still mostly advertise their products for FIT and GIT through print.
- Television, cinema and digital lead the growth of the media and entertainment sector in India. The most recent figures show that penetration of television reached 66%, while India ranked as the 2nd largest internet market in the world.
- Indians prefer to access the internet on their mobile devices rather than on desktops (75% of web traffic vs. 25% for desktops).
- As word-of-mouth is still a key influencing factor in this market, the role of advocacy on social media and review websites should not be underestimated. Indians are slightly more likely to be influenced by films or TV series than the global average when picking their destination.

86%

of Indian consumers' decisions are influenced by some digital information

Source: ITA Media and Entertainment Top Markets Report (USA Department of Commerce), Statista 2019, BCG/Google 'Demystifying the Indian online traveler', Broadcast India Survey, GlobalStats, Hootsuite Digital 2020

3.4 Reaching the consumer: print media landscape

- India's press is lively and there are around 17,000 newspaper titles. Driven by a growing middle class, the cumulative newspaper circulation figure is more than 400 million.
- While the newspaper industry is dwindling worldwide, India is one of the few countries where print media is not only dominant, but also growing in all aspects including circulation, readership and sales. India is the largest global market for print newspapers based on revenues.
- A spurt in literacy rates along with a renewed focus on regional language publications have been the main drivers of this growth. There is also a socio-culturally embedded routine of having newspapers delivered to the doorstep amongst a large section of society.
- As the younger population is increasingly embracing news on their screens, the challenge for India's newsprint industry is to be able to retain their audiences through digital platforms.

Newspapers	Other information
The Times of India	Mumbai based daily
The Hindu	Chennai based daily
The Hindustan Times	New Delhi based daily
The Pioneer	New Delhi based daily
The Indian Express	New Delhi based daily
The Statesman	Kolkata based daily
Deccan Herald	Bangalore based daily
The Asian Age	New Delhi based daily
India Today	New Delhi based news magazine
Outlook	New Delhi based news magazine

Travel trade publications
Travel Talk
Travel Trends Tabloid
Today's Traveller
Travelbiz Monitor
Express Travel World
SellingWorld Travel
Premier
News Wire
Travel Span
Plaza Times
The World of Travel and Tourism
Go Now/ Hospitality India
World of Travel
Xpress Travel and Tourism

Source: BBC Media Profile, Audit Bureau of Circulations, Statista

3.4 Reaching the consumer: broadcast media landscape

TV

- The movie industry in India is big business and box office revenues are growing steadily. Indians' main pastimes include movie-going and watching cricket.
- Television has an estimated 66% penetration rate which makes it a powerful media in India. Its viewership is growing too, with subscriptions to over-the-top (OTT) services, digitised cable TV and direct-to-home services booming.
- Since deregulation in 1991 there has been considerable growth in local, national and international offerings.
- The spread of television has resulted in greater awareness of global events and different international lifestyles, thereby shaping aspirations and attitudes, especially those of the young.
- As of 2021, 35% of the Indian population are estimated to live in urban areas. Therefore a growing proportion of people have access to cinema showings.
- The cinema industry in India is dominated by the influence of the movies produced in Hindi in Bollywood, Mumbai, and those produced in Tamil in Kollywood in Chennai (Tamil Nadu region).
- TV streaming (OTT) platforms have grown in popularity in urban areas, and, as of 2020, across the country. As of December 2020, India reported 355 million OTT viewers, a +35% year on year growth.

Radio

- Radio also remains a major media in India. It is also affected by a change in distribution methods, with more digitised channels.
- The publically owned All India Radio reach more than 99% of the population, and daily radio consumption is around 16 minutes on average across India in 2020.

TV channels	Radio stations	Top OTT platforms
Doordarshan	All India Radio	Netflix
CNN News18	Radio One	Amazon Prime
New Delhi TV	Radio Mirchi	Hotstar
Star TV	Radio City	ALTBalaji
Zee TV	Red FM	Zee 5
Aaj Tak		Voot
		SonyLIV
		Viu
		Hoichoi

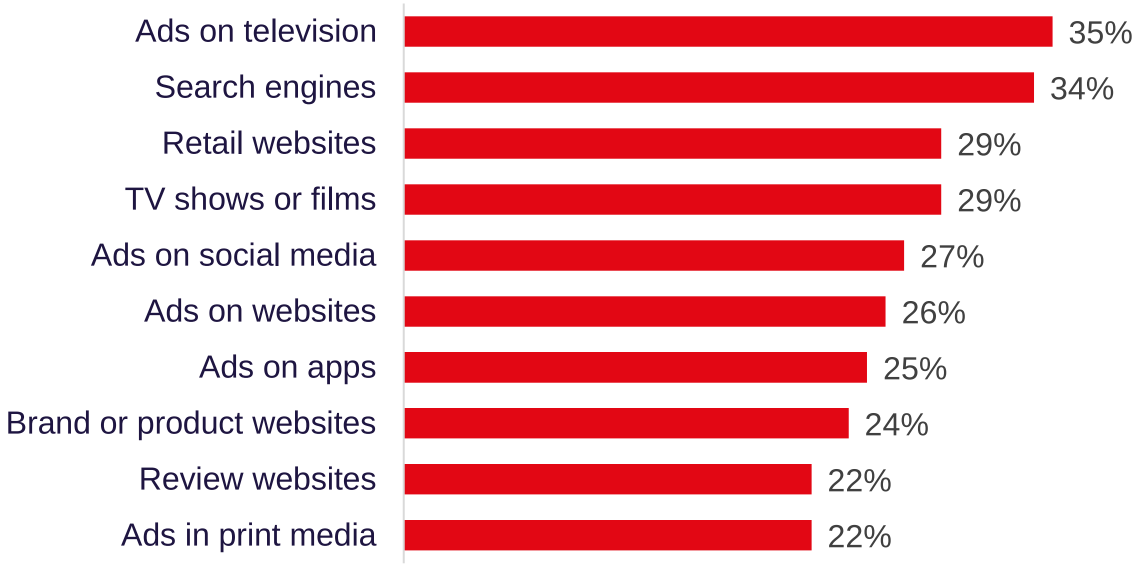
Source: BBC Media Profile, CIA Factbook, ITA Media and Entertainment Top Markets Report (USA Department of Commerce), Statista, "Outbound travel – a digital overview" by Google, BCG/Google 'Demystifying the Indian online traveler', Nielsen, Techradar, Grabon

3.4 Reaching the consumer: internet and social media

- India is ranked as the second largest internet market in the world, after China, with 688 million internet users and an Internet penetration rate of about 50% in early 2020. The volume of internet users is booming, with a growth of 23% between 2019 and 2020.
- Internet users aged 16-64 are most likely to access the net via mobile, with mobile phone ownership at 91% among this group compared to 62% for laptop or desktop computers.
- Indian users are most likely to spend their time online watching online videos and streaming music.
- Social media penetration was at 29% in early 2020, with 130 million more social media users when comparing 2019-2020 (a growth rate of 48%), and an average of 10 social media accounts per internet user.

Most used social media platforms	Social media channel reach (m)*	Mobile app rankings
YouTube	448	WhatsApp Messenger
Facebook	320	Facebook
WhatsApp	-	TrueCaller
Instagram	140	Facebook Messenger
FB Messenger	140	Shareit
Twitter	18	Amazon
LinkedIn	71	MX Player
TikTok	-	Instagram
Pinterest	-	PayTM
Skype	-	Hotstar

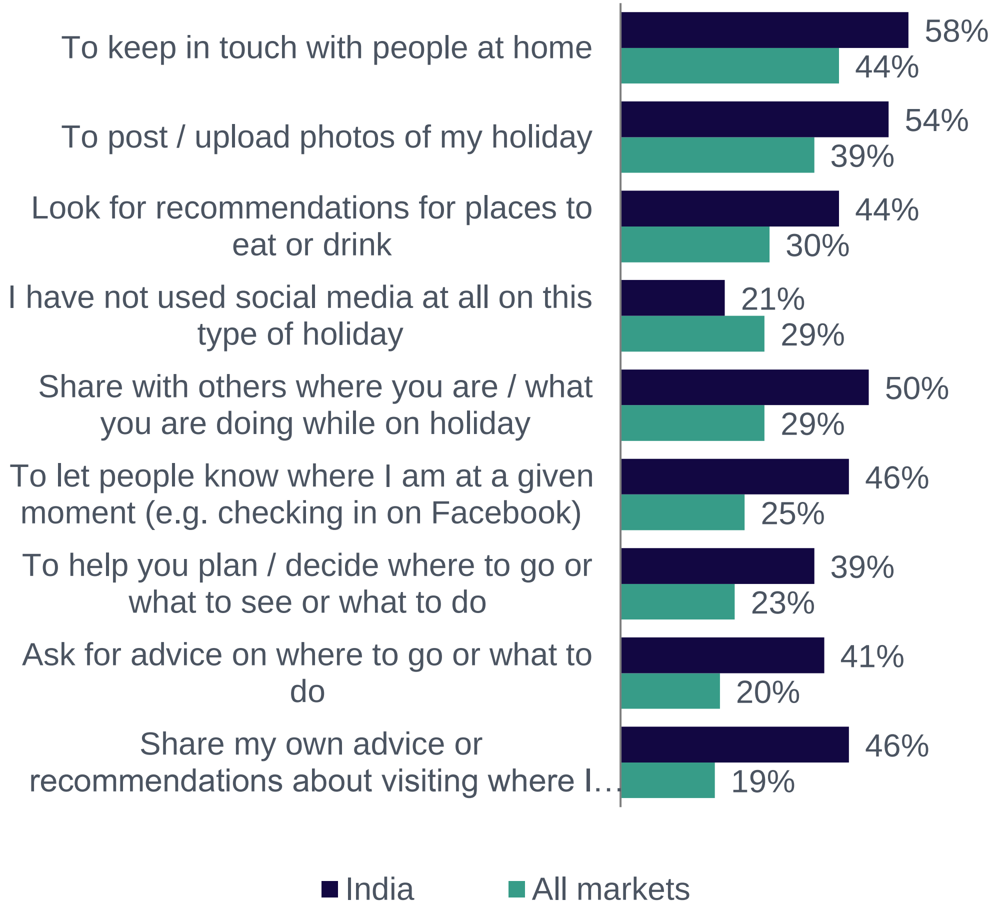
Sources of new brand discovery



Source: Hootsuite Digital 2020 *This data is not available for all most used platforms

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

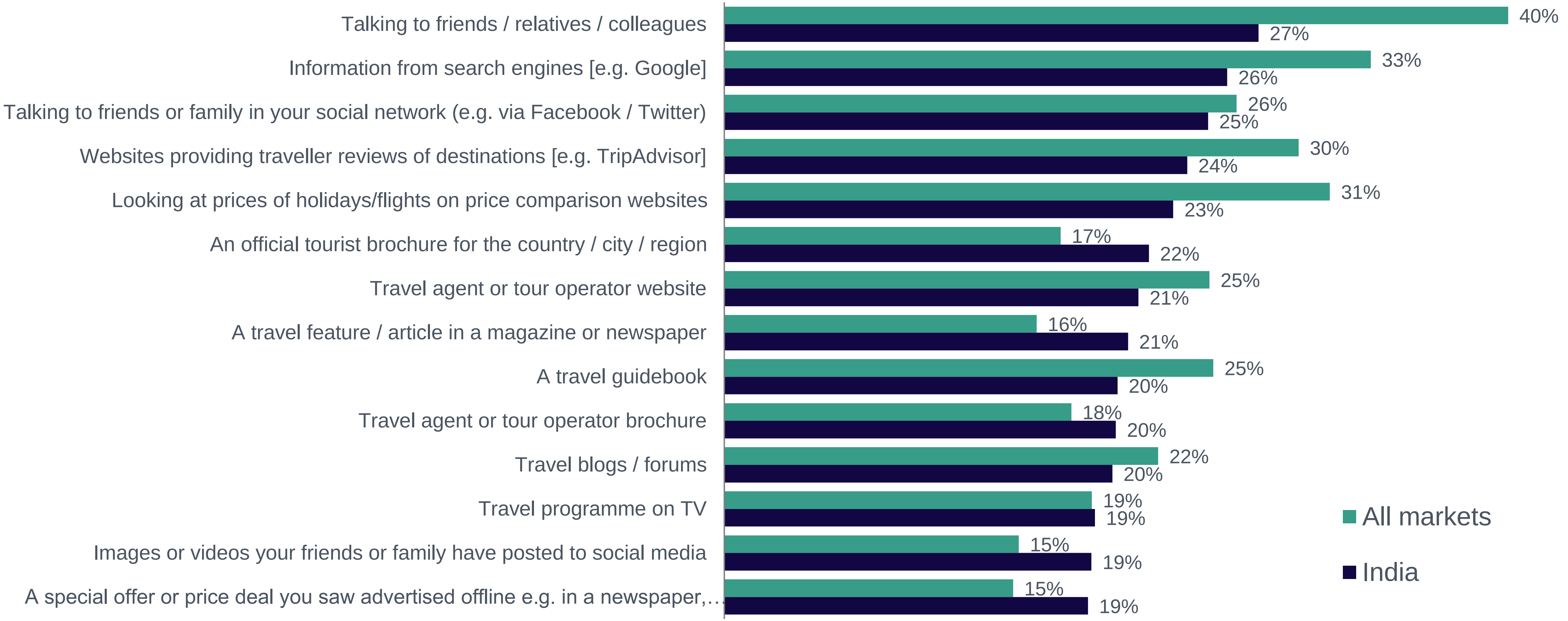


- 58% of Indian travellers like to keep in touch with people at home, 54% like to post/upload their holiday photos, and 50% like to share with others where they are and what they are doing.
- 88% like to stay connected whilst they are on holiday and 9-in-10 visitors regard their smartphone as an essential item whilst they go on holiday (compared to 73% all-market average).
- 90% of Indian travellers love to take photos when they are on holiday which is above the all-market average (78%).
- 74% of Indian travellers have taken and shared holiday photos online, and 67% have taken and shared online videos on holiday.
- Indian respondents are twice as likely to have used social media to ask for advice on where to go or what to do whilst on holiday. 8-in-10 Indian travellers trust the reviews of other tourists on social media.
- They are also much more likely to share their own advice or recommendations about the place they visited on social media (46% against 19% on average across all markets).

Source: VisitBritain/IPSOS 2016, base: all respondents: Have you used social media in any of the following ways whilst on your last holiday to Britain (visitors) /on your last holiday to a foreign destination (considerers)?

3.4 Reaching the consumer: influences (top 14)

Influences on destination choice – top 14

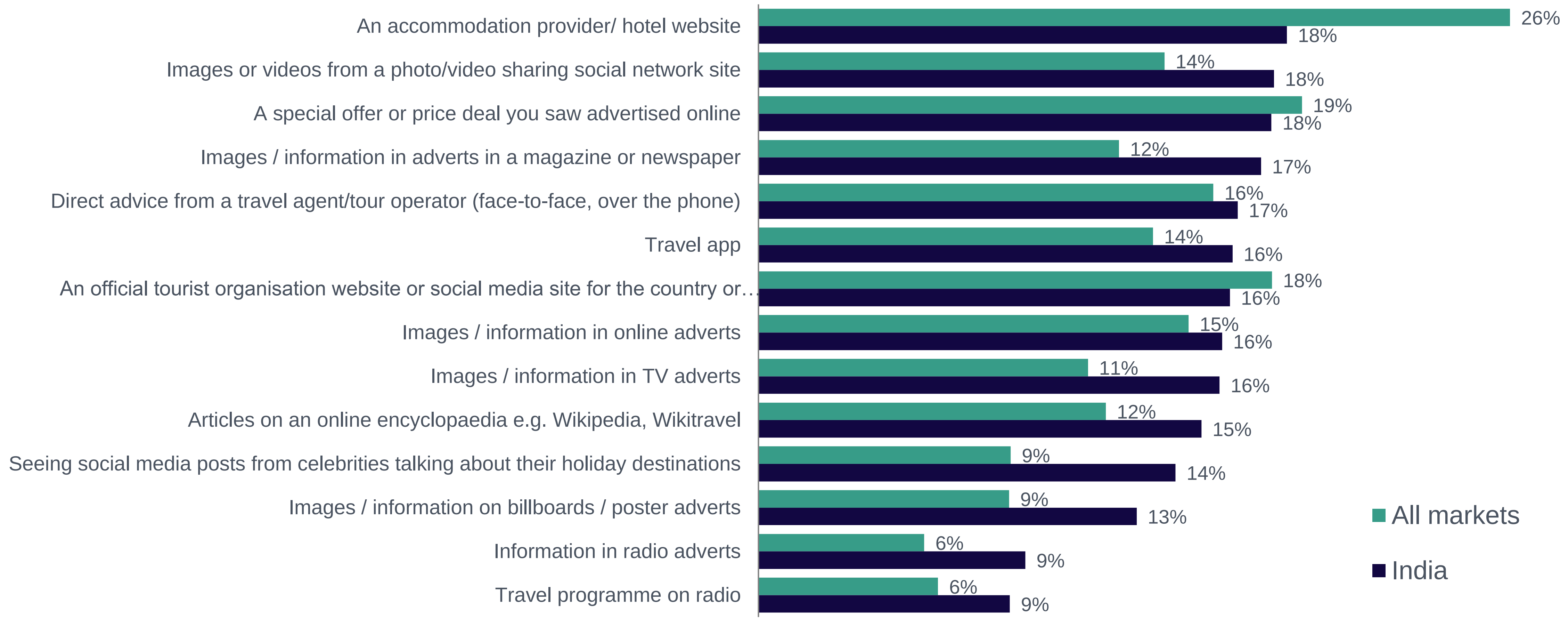


Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

VisitBritain VisitEngland

3.4 Reaching the consumer: influences (bottom 14)

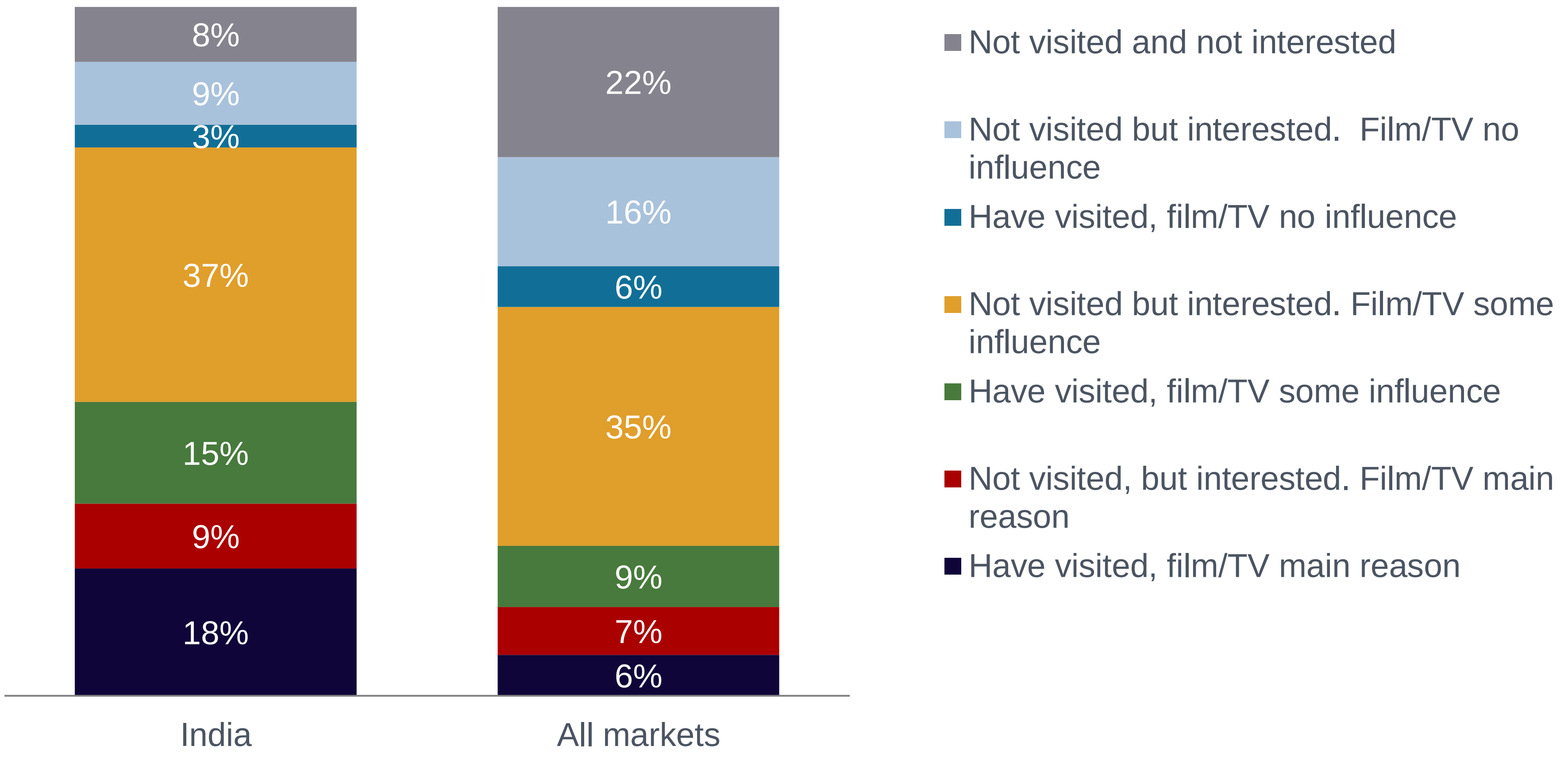
Influences on destination choice – bottom 14



Source: VisitBritain/IPSOS 2016, base visitors & considerers. Which of the following sources influenced your choice of destination? (Market scores have been adjusted so that the sum of all influences for each market is equivalent to the global total, to enable meaningful comparisons)

3.4 Reaching the consumer: influences

Likelihood to visit a place featured in a movie, TV series or book



Source: Anholt Nation Brands Index 2017: Have you ever visited a film or TV location whilst on a holiday/vacation abroad? If yes: To what extent was the film or TV location a reason for you choosing to take a trip to that destination? If no but would be interested: To what extent would a film or TV location be the reason for you choosing to take a trip to a specific destination?

Access and travel trade

Chapter 4

Getty Images/ Gordon Edgar Images

4.1 Access: key facts

- In 2019, 89% of Indian visitors departed the United Kingdom by plane. The Air Passenger Duty for those visitors is £80.
- In 2019, 7 airports in India (Ahmedabad, Amritsar, Bengaluru, Chennai, Delhi, Hyderabad and Mumbai) served direct routes to four airports in the UK (Birmingham, Manchester, London Stansted and London Heathrow).
- In 2019, flights from Delhi and Mumbai comprised 72% of the seat capacity, and those to Heathrow 93%.
- Jet Airways stopped operating flights to the UK in April 2019. However, SpiceJet and Vistara launched new routes in 2020.
- Direct seat capacity between India and the UK has seen some challenges since 2012, and the loss of Jet Airways significantly impacted metrics in 2019.
- However, connecting routes on Middle Eastern carriers have been growing fast in recent years. The trade reports that they account for a third of the traffic between India and Britain today. They offer more regional options in both countries.

Due to the COVID-19 outbreak, seat capacity from India to the UK had dropped by 91% by April 2020 compared to the same month in 2019. However, a travel bubble agreement put in place in July 2020 did trigger some recovery, with seats at 48% of 2019 levels on average through the year. Departures are planned to stay at a low level for at least H1 2021.

89%

of Indian visitors travel to the UK by plane

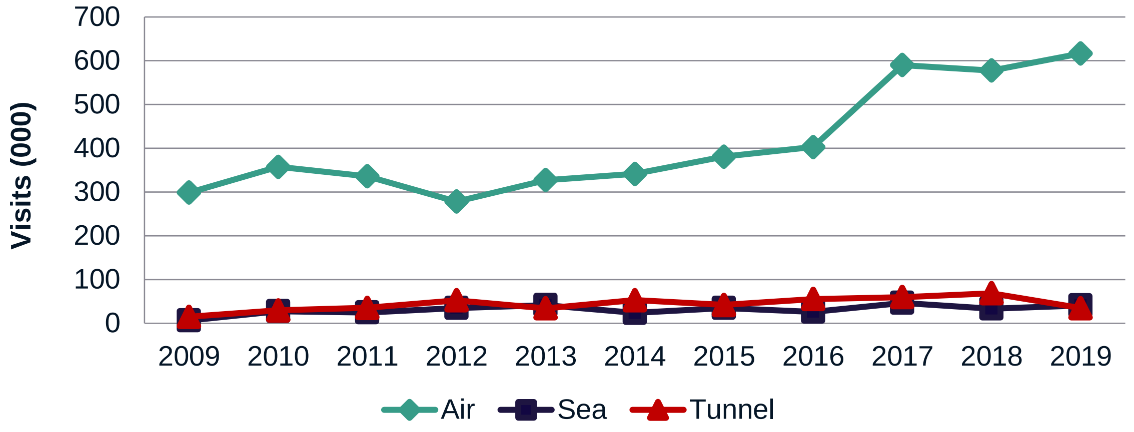
Access to Britain

Measure	2019
Weekly aircraft departures	92
Weekly seat capacity	22,737
Airports with direct routes in India	7
Airports with direct routes in Britain	3

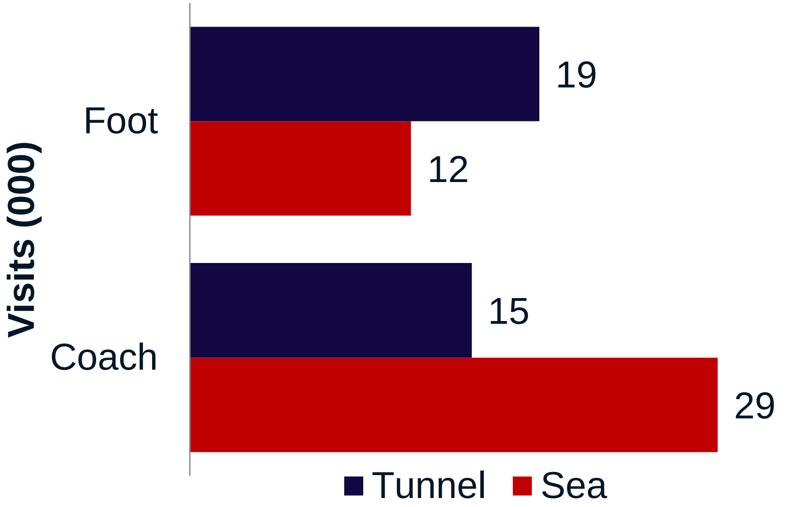
Source: Apex 2019, non-stop flights only, excluding charter flights (Tui/Thomson Airways, Thomas Cook Airlines)

4.1 Access: mode of transport

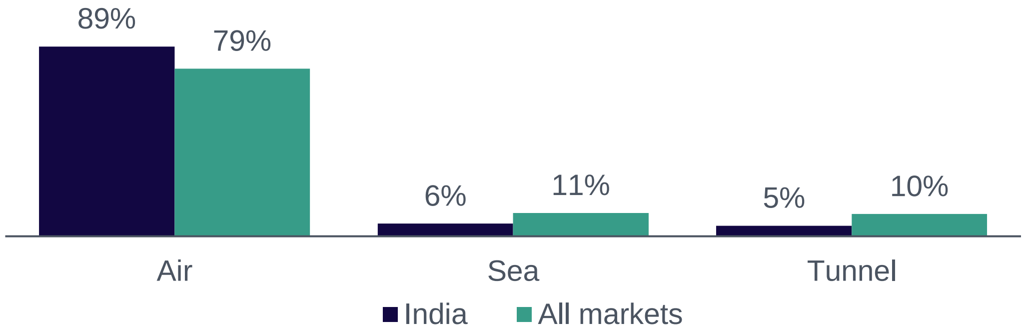
Visits by mode of transport



Sea and tunnel travel (000s) in 2019



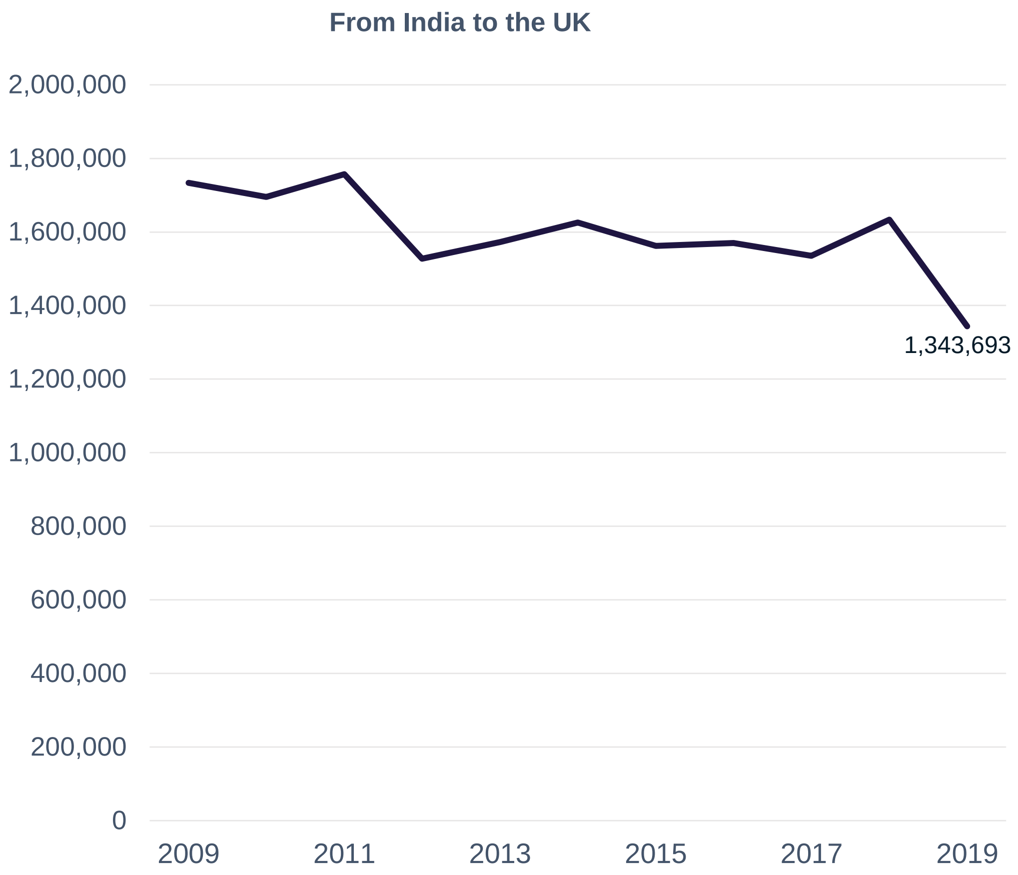
Annual share by mode (2019)



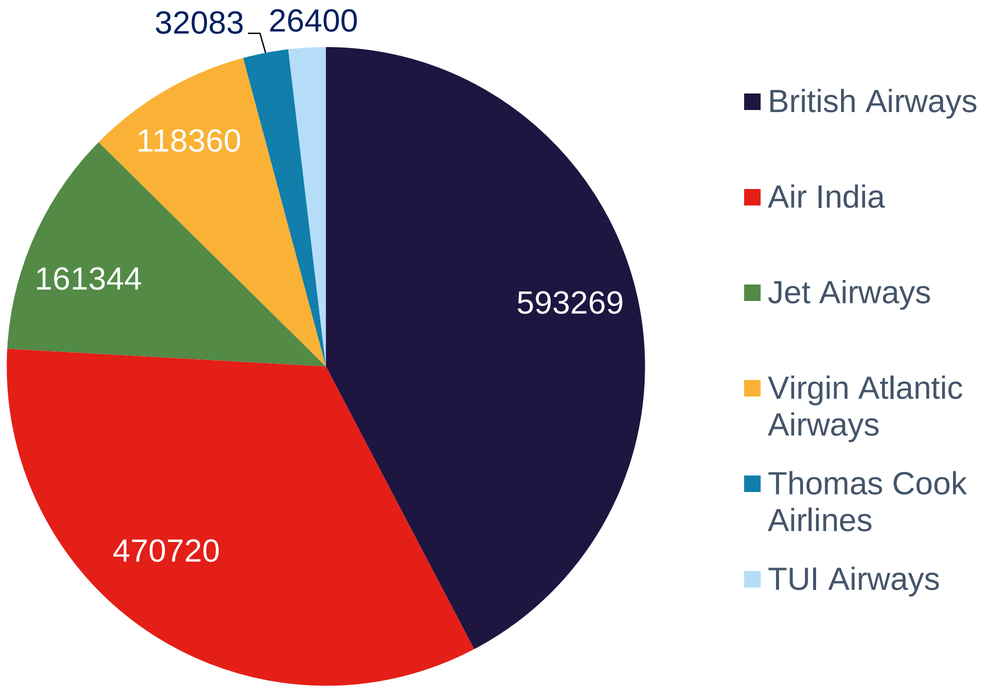
Source: Apex 2019, non-stop flights only, excluding charter flights (Tui/Thomson Airways, Thomas Cook Airlines)

4.1 Access: capacity (1)

Annual airline seat capacity trends



Airline seat capacity by carrier (2019)

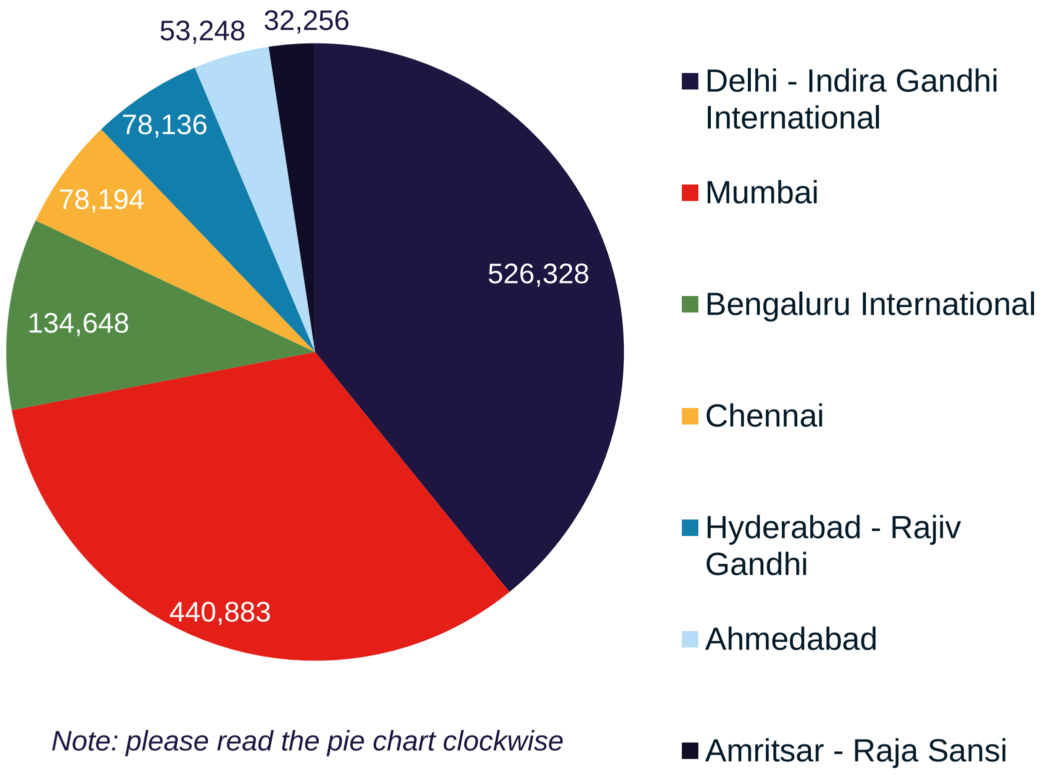


Note: please read the pie chart clockwise

Source: Apex 2019, non-stop flights only, excluding charter flights (Tui/Thomson Airways, Thomas Cook Airlines)

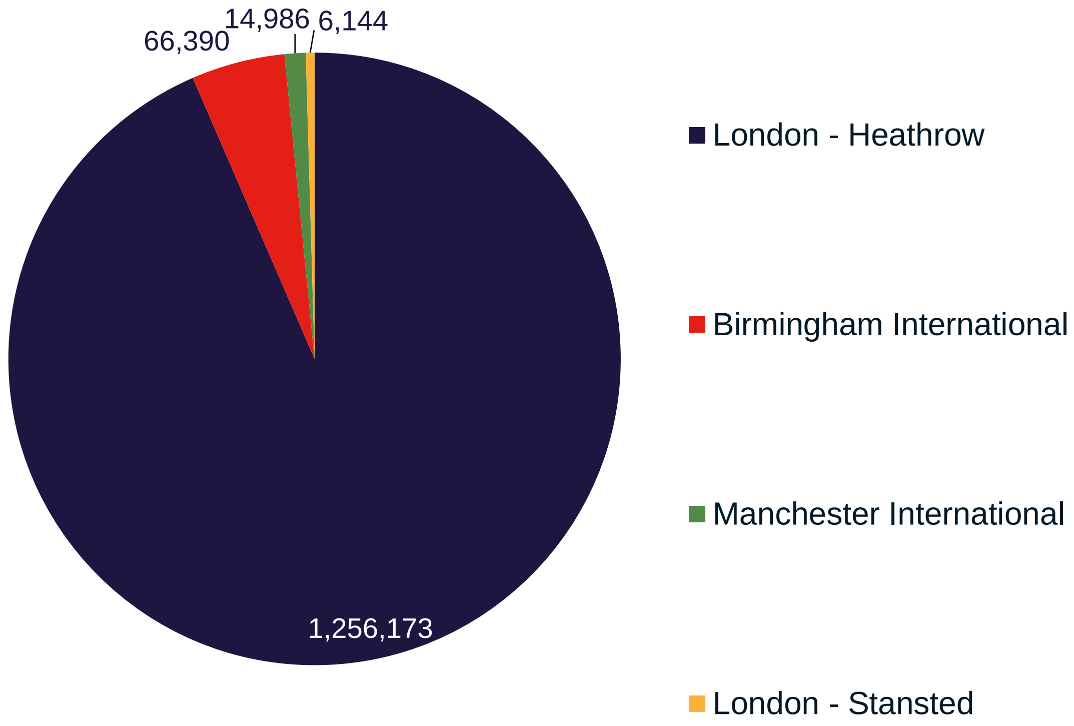
4.1 Access: capacity (2)

Origin airport annual seat capacity (2019)



Note: please read the pie chart clockwise

Destination airport seat capacity (2019)



Note: please read the pie chart clockwise

Source: Apex 2019, non-stop flights only, excluding charter flights (Tui/Thomson Airways, Thomas Cook Airlines)

4.2 Travel trade: general overview

- The travel trade in India is highly fragmented, with a large number of players in an unorganised sector handling the bulk of outbound travel business. The organised sector represents less than 5% of overall outbound travel from India.
- Despite the rising trend in online bookings, retail agencies still handle the majority of outbound travel from India.
- There are about 150 key travel agents in the five metro cities of Delhi, Mumbai, Chennai, Bangalore and Kolkata that promote international destinations, including Europe. Some of the smaller agents and tour agents from across India also include Europe in their portfolio.
- Most Indian travel companies operate across all segments of travel, including group tours, FIT, business events and luxury travellers.

Traditional and online distribution systems will continue to co-exist over the next few years as the Indian outbound market grows and matures

Source: ETC Snapshot of the Indian Outbound Travel Market

4.2 Travel trade: Indian tour operators

Major operators with pan-India presence
Thomas Cook (India)
SOTC
Kesari Tours
Veena World
D’Paul’s Travels & Tours
JTB Travels
Vacations Exotica
TUI
FCM Travel Tours
Riya Travels and Tours
Akbar Travels
Ebix Cash

Top online travel agencies
Makemytrip.com
Cleartrip
Yatra.com
EaseMyTrip
VIA.com

- OTAs have become a major force in the distribution of domestic travel. Their presence in the international segment is smaller, but rising, with an estimated 14% of international flight bookings. Indian travellers prefer to use OTAs rather than airline/hotel websites because of ‘ease of booking’, ‘ability to compare prices’ and ‘better deals’.
- Beyond the top OTAs listed in the table on the left, international sites such as Expedia, TripAdvisor, Wego, hotels.com agoda.com, booking.com and Trivago are also popular.
- Wider broadband and smartphone coverage and increasing familiarity with digital channels is anticipated to increase bookings through OTAs in the coming years, with residents of smaller towns playing an important part in this growth.
- It is anticipated that traditional and online distribution systems will continue to co-exist over the next few years as the Indian outbound market grows and matures.
- There are three main travel trade associations in India with the largest numbers of members:
    - The Indian Association of Tour Operators (IATO): over 1,600 members
    - The Travel Agents Association of India (TAAI): over 1,800 members
    - The Travel Agents Federation of India (TAFI): 800 members

Source: ETC Snapshot of the Indian Outbound Travel Market

4.2 Travel trade: Indian holidays

National public holidays

Date	National Holiday
26/01	Republic Day
15/08	Independence Day
02/10	Mahatma Gandhi's Birthday

- There are only 3 days of national public holidays in India. However, there are a lot of religious holidays that are observed regionally depending on the states throughout the year. Most states observes New Year's day, Diwali, and the main Islamic and Christian holidays too.
- The exact dates of some of these holidays and festivals can change from year to year, and the number of days it is observed for can change from one state to the other.
- On average, Indians receive 24 days of paid vacation a year. They are also entitled to 15-20 paid public holidays, depending on the region/state of residence.

Source: Officeholidays.com

4.2 Travel trade: practical information

General information:

- The top ten agents of most airlines are consolidators, operating on high volume and low margins through a network of sub-agents. There are two sorts of consolidators: the ticketing wholesalers (Akbar Travels of India for example) and the hotel/tour package wholesalers (GTA for example).
- The emergence of agencies servicing the individual travellers for their travel-related services is a relatively new phenomenon, though some incentive and business agents control the bulk of the market. Online booking is becoming increasingly popular, most of all for domestic travel. Some traditional agencies now have an online presence and the OTA market is becoming more mainstream overall.
- Competition can be quite fierce between the larger travel agents. Those tend to invest in IT solutions that reduce the operating costs, resulting in cheaper options for travellers.
- Many of the smaller agents tend to deal with niche segments which can often be those generating the greatest spend per visit.
- Mid-April to the end of June is the peak season for leisure groups to Britain. Some will be restricted to two or three nights in London on a 14-day European coach tour, with the option for extra days to be added on an independent basis.

Trade exhibition:

- Indian agents will often travel to trade fairs, including some held in Britain, so can be contacted at these events. In India there are many trade fairs that are worth considering attending, including OTM, SATTE, the TTF events (Travel & Tourism Fair), and some Travel Mart events such as KTM (Kerala Travel Mart) or IITM one (India International Travel Mart).

Planning cycle:

- The trade starts to receive enquiries for travel during the peak summer months in January; brochures are therefore planned and produced by December or January at the latest.
- You can engage with operators as early as a year in advance as they are usually happy to start discussions quite early.
- However, itinerary finalisation and price negotiations continue almost until the time of departure and last-minute changes happen frequently. Approaching the Indian travel trade in October-November, when the outbound programme of the next year is actually being planned, is still a valid option.
- Face-to-face meetings are the best way to make an impact, as the trade prefers to deal with people they have met.
- Mumbai, Delhi, Bangalore and Hyderabad are the key cities to visit, followed by Kolkata, Chennai, Amritsar and Ahmedabad depending on budget and time.

4.2 Travel trade: doing business

Practical information

- **Time difference:** India is 5.5 hours ahead of GMT (UK winter time), but 4.5 hours ahead of BST (British Summer Time).
- **Climate:** October to February is the best time to visit weather-wise. Avoid April to September.
- **Business hours:** during the week tend to be 10.30am until late, often 8pm, which can be convenient for contacting the trade from Britain. Most travel agents work all day Saturday, as well.
- **Transport:** The best way to travel between appointments is to hire a taxi with a driver.

Cultural differences

- India has a hierarchical culture. Titles such as Professor, Doctor and Engineer should be used when relevant, instead of ‘Sir’ or ‘Madam’.
- People should be greeted and bid farewell individually.
- Shaking hands is common practice. However, because of some religious beliefs, it may be preferable to wait for your host to extend their hand first.
- Business attire is quite conservative.
- Offering gifts to business partners is not unusual. But gifts are not to be opened when received. Religious or cultural differences should be considered when selecting the gift too.

Meetings & business negotiations

- Appointments should be made 1 to 2 months in advance. The best time for a meeting is late morning or early afternoon. Last-minute cancellations are common: reconfirm your meeting the week before and call again that morning.
- Punctuality is highly valued, but you should keep your schedule flexible for last-minute changes.
- Business cards are to be exchanged at the beginning of a meeting. Use the right hand to give and receive them. Always present yours so that the recipient may read it as it handed to them.
- Building relationships comes first: meetings might start with a great deal of getting-to-know-you talk.
- Business in India becomes smoother if meetings are well documented. It is best to send a detailed agenda in advance, as well as back-up materials and charts as this allows everyone to review and become comfortable with the material prior to the meeting. After the meeting, do send an overview of what was discussed, agreements reached, and next steps.
- Many Indians expect concessions in both price and terms. It is acceptable to expect concessions in return for those that you grant. It is best not to appear overly legalistic during negotiations, as trust in one’s word is usually highly valued.

4.3 Caring for the consumer: etiquette

Understanding the culture and etiquette

- Family plays an extremely important role in Indian life. Many Indians will be mindful of the needs of children or elder family members who will be travelling as part of the group when planning a holiday.
- The ‘Namaste’, the greeting with folded hands, is the Indian form of salutation and its use is appreciated, although men, especially in the cities, will not hesitate to shake hands with you if you are a man. However, because of some religious and cultural differences within the country, it can be best for you to wait for your guest to extend their hand first to shake it.
- Addressing people by first name does not come naturally to many Indians, and it might also be preferred to use 'Sir', 'Madam', 'Miss', 'Mrs.' or 'Mr.’ when addressing them.
- Telephone contact and face-to-face interaction is appreciated, as well as additional brochures for the family to mull over and make choices of where to go.
- Expectation levels for standards and service are high – any issues should be resolved promptly.
- It is customary for many Indians to shake their head in the course of conversation or taking instructions. This movement does not necessarily signify disagreement and can simply mean that they are hearing you.
- Indians are inquisitive by nature and come up with questions at all stages. They do not mean to be intrusive by doing this. For an Indian, ‘getting-to-know-you’ questions are made in good faith, and with a genuine interest in developing a relationship.

4.3 Caring for the consumer: hospitality

Accommodation

- With increasing affluence and greater travel experience, many Indian travellers now prefer to stay in hotels rather than with friends or relatives when on holidays. They may, however, save on accommodation in order to have more spending money. Indian travellers in London, particularly the more affluent families staying for two to three weeks, are likely to rent apartments during their visits.
- Indian travellers often request interconnecting and family rooms. They also prefer in-suite facilities like TV, refrigerator and walk-in closets. Indians often ask for late check outs, unless they are on a structured tour.
- Leisure visitors from India are less likely than those from the average market to use a credit card while in Britain.

Language

- Given the number of regional languages in India, translating brochures and materials for Indian visitors is not realistic.
- Although most Indians speak excellent English and have good awareness of English literature, it is important to communicate clearly and simply as some may have issues understanding slang or accents.

Food and drink

Many Indians are vegetarian, or teetotallers. There is a wide range of dietary restrictions in India:

- Hindus do not eat beef and many are vegetarians,
- Muslims do not eat pork or drink alcohol,
- Sikhs do not eat beef but can drink alcohol and do not limit their meal to vegetarian options,
- Jain vegetarians might not eat vegetarian food if it is cooked in the same kitchen that cooks food that is unacceptable to them.

A good variety of vegetarian options should be on menus; no non-vegetarian elements should be mixed in the preparation or presentation of meals. Lamb, chicken, and fish are the most commonly served main courses for non-vegetarian meals as they avoid the religious meat restrictions. At meal time Indians expect water to be served and to have large portions of bread/rice served with gravy-based dishes.

Most Indians do not mind eating European or British vegetarian food, but will want a truly Indian meal now and then. Some Indian tour groups travel with their own chef.

Indians tend to prefer tea to coffee, which is commonly drunk mid-morning and around 5pm. Whisky, beer, vodka and rum are the most popular alcoholic beverages among those who drink alcohol. Dishes are often shared among a group. Dinner time is usually late, not before 9pm in many cases.

Useful links and further information

Appendix

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Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

- Digital and social media such as through Twitter, our Facebook page – Love GREAT Britain, or Pinterest.
- Press and PR by sending us your newsworthy stories or partnering to host journalists, influencers, and broadcast shoots
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Retailing your product through the VisitBritain shop
- Joining the Tourism Exchange GB platform – giving you access to a wide range of international customers, via connected distributors. Connection to the platform is free.
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our:

Opportunity search or trade website

or contact the B2B events team
(Email: events@visitbritain.org)

or campaign partnerships team
(Email: partnerships@visitbritain.org)

or trade support team
(Email: tradesupport@visitbritain.org)

or VisitBritain shop team
(Email: product@visitbritain.org)

Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our **'I Travel For…'** marketing campaign.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

VisitBritain also develops and promotes products for Business Events, food & drinks, rail, luxury, regional gateways, and the Discover England Fund. Find out more at our Discover England Fund page.

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

'I Travel For…' campaign

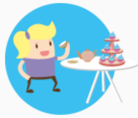
The tourism sector deal

Appendix 1: Working with VisitBritain (3)

VisitBritain’s global audience segments

- From 2017, VisitBritain has carried out a research project across all its main inbound target markets to define global audience segments and identify best opportunities in each of those international travellers’ market. On the right is a summary of VisitBritain’s 5 global audience segments. To learn more visit our page on understanding our customers.

- In India, VisitBritain focuses on one audience segment among the international travellers aged 25+:
  - **Buzzseekers in India:** looking for action and adventure, and for an exciting and rewarding holiday.

Segments (& global attributes)	**Global market share**	**Market share in India**
 **Buzzseekers** (free spirited and spontaneous, they like holidays full of action and excitement)	38%	67%*
 **Explorers** (they enjoy outdoors, must-see sites, and embracing local cultures at a more relaxed pace)	23%	7%
 **Adventurers** (they live to go off the beaten track, spending time outdoors and trying out new experiences)	16%	11%
 **Sightseers** (they prefer staying within comfort zone, preferring cities to countryside, planning in advance)	12%	6%
 **Culture Buffs** (image and brand conscious, travel is seen as a status symbol; they like well-known, safe destinations)	12%	8%

Source: VisitBritain/Kubi Kalloo, 2017, * Buzzseekers aged 25+ represent 22% of all respondents from India

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

- Latest monthly, quarterly overall and quarterly by area data from the International Passenger Survey by ONS.
- Inbound Tourism Trends by Market
- Inbound activity data
- Inbound nation, region and country data
- Inbound town data
- Sector-specific research which includes topics such as accomodation, countryside and coast, culture heritage and attractions, food and drink, football tourism, shopping, transport and visits with a health condition or impairment.
- 2021 Inbound Tourism Forecast
- Britain's competitiveness

We are here to support you and look forward to working with you.

To find out more about India or other inbound markets browse our:

Markets & segments

Inbound research & insights

Inbound COVID-19 sentiment tracker

Or contact us directly
(Email: research@visitbritain.org)

Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

- Perceptions of Britain overseas
- Planning, decision-making and booking cycle of international leisure visitors to Britain
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
- Food & drink research

We are here to support you and look forward to working with you.

To find out more about India or other inbound markets browse our:

Markets & segments

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Or contact us directly
(Email: research@visitbritain.org)

Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the March 2021 update of the 'Global Travel Service' databank.
- **Apex** data was last updated with April 2021 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, March 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Anholt Nation Brands Index** (NBI), now powered by Ipsos, was carried out online in July/August 2020 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** journey purpose means Miscellaneous – other journey purposes.
- In IPS, to be defined as a **package**, a holiday must be sold at an inclusive price covering both fares to and from the UK and the cost of at least some accommodation. Neither the respondent nor the travel agent from whom the package was bought will know how much of the inclusive price is accounted for by fares or by accommodation.
- **High Net Worth Individuals**, or HNWIs, are people with liquid assets valued over USD1million.

Other useful information

- **Top 10 activities in Britain** is based on propensity for visitors to have undertaken activities whilst in Britain, data having been collected between 2006 and 2019. Where an activity was asked about more than once, only the most recent answers were taken into account.
- **Repeat visits** are visits made by people who had already visited the UK before; British expats have been excluded for better representation of the market's propensity to visit Britain repeatedly. IPS question asked in 2015.
- **Likelihood to recommend Britain** as a destination is based on holiday visits, of at least one night, excluding British expats.

Market and Trade Profile: India

April 2021

Destination Bristol ©Gary Newman