India

Inbound tourism overview

Annual visits

<table>
<thead>
<tr>
<th>Year</th>
<th>Visits</th>
</tr>
</thead>
<tbody>
<tr>
<td>2014</td>
<td>418,000</td>
</tr>
<tr>
<td>2015</td>
<td>458,000</td>
</tr>
<tr>
<td>2016</td>
<td>484,000</td>
</tr>
<tr>
<td>2017</td>
<td>696,000</td>
</tr>
<tr>
<td>2018</td>
<td>680,000</td>
</tr>
<tr>
<td>2019</td>
<td>692,000</td>
</tr>
</tbody>
</table>

Global ranking for inbound visits to the UK in 2019: #16

Seasonal spread of travel (2019)

<table>
<thead>
<tr>
<th>Season</th>
<th>Visitor Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jan–Mar</td>
<td>17%</td>
</tr>
<tr>
<td>Apr–Jun</td>
<td>32%</td>
</tr>
<tr>
<td>Jul–Sep</td>
<td>34%</td>
</tr>
<tr>
<td>Oct–Dec</td>
<td>17%</td>
</tr>
</tbody>
</table>

Annual visitor spend

2019 average spend per visit: £1,088

Global ranking for inbound spend in the UK in 2019: #11

Purpose of travel (2019)

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Visitor Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>VFR*</td>
<td>33%</td>
</tr>
<tr>
<td>Business</td>
<td>25%</td>
</tr>
<tr>
<td>Holiday</td>
<td>30%</td>
</tr>
<tr>
<td>Study</td>
<td>5%</td>
</tr>
<tr>
<td>Misc</td>
<td>7%</td>
</tr>
</tbody>
</table>

Regional spread of travel (2017-2019)

Departure & destination airports** (2019)

- Birmingham
- London Heathrow
- London Stansted
- Delhi
- Mumbai
- Hyderabad
- Chennai
- Bengaluru
- Ahmedabad
- Amritsar

Average flight seats per week** (2019): 22,737

Average length of stay: 18 nights

Sources: International passenger Survey (IPS), Apex.
India

Visitor profile

Key demographics: age (2017-2019)

- 0-15: 2% (3%)
- 16-24: 6% (12%)
- 25-34: 20% (22%)
- 35-44: 25% (22%)
- 45-54: 19% (21%)
- 55-64: 17% (13%)
- 65+: 11% (7%)

Travel companions (2017)

- On their own: 38% (41%)
- Spouse/Partner: 35% (29%)
- With children under 18: 16% (14%)
- With other adult family members: 16% (12%)
- With friends: 8% (4%)
- With a tour group: 4% (10%)

All above data shown as % of all respondents who visited Britain from...

Top three activities in the UK (2006-2019)

- Dining in restaurants
- Sightseeing famous monuments/buildings
- Going shopping

Visitors nationalities (2017-2019)

- India: 97%
- UK: 1%
- Others: 2%

Priority market segment & attributes

Buzzseekers
Looking for action and adventure, and for an exciting and rewarding holiday

Visitors’ origin* (2015)

Business visitors (2019)

171,000

Spend from Business visitors (2019)

£238m

Perceptions of Britain (2019)

Britain is ranked highly (within the top 10 countries) by the Indian for:

- Historic buildings
- Vibrant cities
- Contemporary culture
- Sports
- Cultural heritage

86% of visitors from India were 'extremely likely' to recommend Britain in 2017

Source: International Passenger Survey (IPS), Nation Brands Index (Ipsos)