

INSIGHTS into the service needs of the Indian traveller

India is the second most densely populated country in the world, second only to China, with a population of 1.2 billion people. India is also a very diverse country, consisting of 29 States and seven Union Territories, with a multitude of religions, customs, cuisines, languages, festivals and music.

As one of the world's fastest growing outbound travel markets, the United Nations World Tourism Organisation predicts India will have 50 million outbound travellers by 2020. Specifically for Australian tourism, the industry's Tourism 2020 strategy identifies that India has the potential to be worth between A\$1.9 billion and A\$2.3 billion annually in visitor spend by the end of the decade. Tourism Australia's India 2020 Strategic Plan was developed to maximise the tourism potential offered by India and to set the foundation for the future, when long haul leisure travel from India becomes more common.

The plan identifies four strategic pillars that are pivotal to being competitive and winning market share in India: Knowing the customer, a dedicated geographic strategy, delivering quality Australian tourism experiences, and building aviation and access. Under the pillars of "knowing the customer" and "delivering quality tourism experiences", this document aims to provide Australian industry with key insights on the needs of the affluent Indian traveller. For further information on the India market, see **Tourism Australia's India Market Profile** and **Understanding the Indian Consumer fact sheet**.

FOOD

Geographic location, religious sensibilities, and traditional tastes all influence Indian cuisine which varies from State to State. Despite these differences, vegetarianism is a common thread and around 42 per cent of Indian households are vegetarian and 35 per cent of weekday meals are vegetarian for the remainder of the non-vegetarian population.¹

There are many classifications of vegetarianism in India, for example 'strict or pure' vegetarians also avoid eggs and Jain² vegetarians don't eat root vegetables such as potatoes, onions, garlic, carrots, sweet potato. Many non-vegetarians will also avoid pork and beef due to religious reasons.

Indians are generally late-diners, preferring a late lunch (around 1pm) and dinner at around 8.30pm or later. Table service is expected during lunch and dinner and there is a preference for hot meals over sandwiches or cold canapés.

A TYPICAL DIET INCLUDES:

- Breakfast** > Milk/coffee/tea with idli (type of savoury cake), dosa (type of crepe), and parathas (type of flatbread).
- Lunch** > An assortment of cooked vegetables, rice and wheat chapathis (type of flatbread).
- Snacks** > Tea/coffee with biscuits (Masala Chai/tea is preferred).
- Dinner** > A light dinner consisting of curried vegetables and chapathis, with one or two non-vegetarian dishes.

WHAT CAN I DO?

- > Offer Indian dishes on menus or buffets (especially breakfast and dinner) and use spices in the food.
- > Include vegetarian Indian cuisine as part of your offering, or provide information on where this is available near your product (particularly Jain vegetarian dishes).
- > The preparation of vegetarian dishes with separate kitchenware/utensils and/or an Indian chef are unique selling points for your product.

¹ According to the Food and Agricultural Association of the United Nations, www.fao.org/wairdocs/lead/x6170e/x6170e09.htm

² Jainism is an ancient religion from India and Jains practice strict vegetarianism.



SERVICE NEEDS

Welcoming Indian travellers with a traditional greeting will create a lasting impression. Greet travellers by saying “Namaste” (pronounced na-mahs-tey) with your palms joined and fingers pointing up.

India has many festivals throughout the year and recognising an important religious festival will be appreciated by travellers. Festivals in India are a time for families to get together and many families will often travel overseas on holidays during this time. Some of the popular religious festivals in India include: Makarsankranti (January), Holi (March), Onam (September), Durga Puja (September/October), Dussehra (October) and Diwali (October/November).

Regarding service needs, Indian travellers prefer flexibility in schedules/itineraries. Where strict schedules need to be adhered to it is advisable to remind travellers to be on time. Asking travellers to be ready early is a way to address this. All key information on products or services should also be provided in English or Hindi language.

WHAT CAN I DO?

- > Use the “Namaste” greeting.
- > Recognise India’s religious festivals with themed products, excursions, itineraries etc.
- > If punctuality is a concern, ask travellers to be at ready at least 30 minutes before the intended departure time/check-out time.
- > Provide information on your product in-language or provide Hindi speaking guides.
- > Ensure service staff are familiar with the needs of Indian travellers.

SHOPPING

Indians are keen shoppers, according to Tourism Australia’s consumer research 23 per cent of respondents rank ‘great shopping’ amongst their most important considerations when choosing a holiday destination.³ In addition, India target market research conducted by Tourism Australia in July 2013, showed that 32 per cent of respondents would shop at malls, and 31 per cent would shop at outdoor markets while on an overseas holiday.⁴

Indian travellers like to purchase gifts for their immediate and extended family while on holiday, and in some cases this can extend to work colleagues. Australian souvenirs are popular purchases, particularly those relating to cricket, which provide ‘bragging material’ when they return home.

On average, Indians enjoy shopping around for offers and deals, with bargaining part of the shopping experience for travellers especially at local markets. Shopping in the evenings is preferred, so travellers need to be advised of opening and closing times for retail areas in advance to avoid disappointment. Personal shoppers or assisted shopping services are also popular choices for Indian travellers.

WHAT CAN I DO?

- > Provide clear and visible information on the location and opening/closing hours of nearby key shopping areas. This includes the locations of discount/outlet shops and centres if nearby.
- > Provide information on shopping locations where bargaining is acceptable.

³Tourism Australia, Australian Consumers Demand Research, conducted by BDA Marketing Planning, 2013.

⁴Tourism Australia, Knowing the Customer in India, April 2013.

PLANNING AND PURCHASING TRAVEL

India is a late booking market, with travellers planning their holiday about two to three months prior to departure.

When choosing a holiday destination, Indian consumers look for safety and security, world-class natural beauty, value for money, good food and wine and interesting attractions to visit. Upon planning the trip, Indian consumers preferred sources include: general internet searches, reviewing flight booking websites, and speaking to friends and relatives and travel agents.³ Being a late booking market and with value for money a key consideration, Indian travellers have an affinity for price-point buying and will shop around for what they determine to be the best deals.

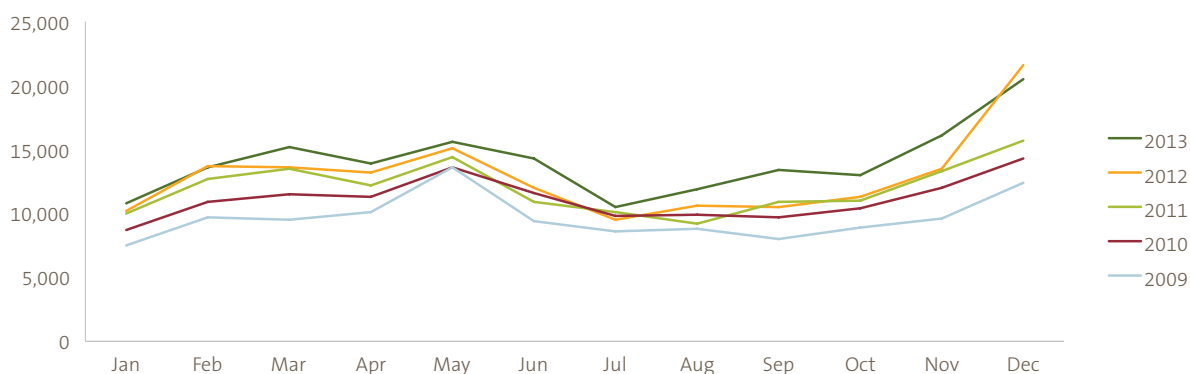
The Indian travel distribution system is highly fragmented and varied across the country. Whilst there are a few national retail agencies, most agents are small, independent businesses and contribute a varying percentage of business to Australia. Anecdotally, the 80-20 rule does not apply in India, with 10 per cent of agents contributing 20 per cent of the business to Australia, and 90 per cent of agents contributing 80 per cent of business.

While Indian consumers are researching and booking their trips using a combination of traditional travel agencies and online options, retail agencies still handle the majority of outbound travel from India. For more information on the distribution system in India, see **Tourism Australia's India Market Profile**.

India target market research conducted by Tourism Australia in July 2013, showed a preference for an eight to 15 day stay, covering three to four cities, when visiting Australia. Tailor-made packages⁵ were preferred over independent bookings or group tours as they were perceived as more relaxing, with free time able to be built into the itinerary.

Australia is currently packaged and sold later than a number of competing destinations. Providing early offers with rates for the Indian market can address this challenge and assist in promoting Australia at the booking periods in the market. Peak travel times to Australia from India are during school holidays, festivals and the Christmas/New Year period. School holidays (April to June), festivals (October/November) and the Christmas/New Year period.

SEASONALITY OF INDIAN VISITORS TO AUSTRALIA



Source : Overseas Arrivals & Departures, Australian Bureau of Statistics

WHAT CAN I DO?

- > Offer discounts or value-add options on products, such as: kids stay/eat free, family packages, bundling attractions together, complimentary upgrades, free WiFi, food included in the cost, stay 3 nights pay 2 nights, offering room discounts across multiple cities etc.
- > Be prepared to offer rates to Indian buyers at key trade events such as the Australian Tourism Exchange (ATE), Tourism Australia's India Travel Mission, Dreamtime, and State/Territory hosted travel trade missions. Communicate rates to agents at least three to four months before the commencement of the travel season, i.e. by November or December for travel during April to June.

⁵ 'Package' in the research referred to flights, transfers, accommodation and tickets for some activities being pre-booked for one lump sum price, and may include some/all food at the accommodation.



WANT TO KNOW MORE?

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Tourism Australia's corporate site www.tourism.australia.com/ssea contains information on the market and the Indian consumer. Updates on Tourism Australia activities and the India market are published in Tourism Australia's industry newsletter, *Essentials*.

