

Consumer Demand Project 2019 India Market Fact Sheet



Current Indian Visitation and Expenditure in Australia¹

Indian visitors to Australia grew by 12.2 per cent to 364,000 in the year ending September 2019, with Indian visitor spend up 10.1 per cent to \$1.3b across the same period. These visitors stayed 22.3m nights, up 18.7 per cent year-on-year.



\$1.3b spend
+10.1% year-on-year



364,000 visitors
+12.2% year-on-year



22.3m nights
+18.7% year-on-year

Factors of importance when choosing holiday destination

Natural beauty and wildlife is the most important factor for Indian travellers selecting holiday destinations. Compared to other markets, Indian travellers place more emphasis on a family friendly destination.

Top five importance factors

% ranking each factor in their top five most important



World-class natural beauty and wildlife **49%**
(49%)



A safe and secure destination **43%**
(54%)



A family friendly destination **32%**
(26%)



A destination that offers value for money **32%**
(39%)



World class coastlines, beaches and marine wildlife **28%**
(26%)

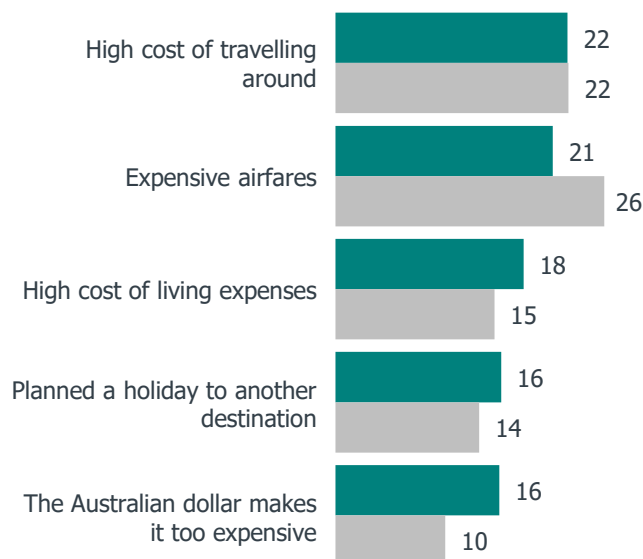
% Indian travellers (%) 11 Market total²

Barriers to visiting Australia

Cost is the biggest barrier to visiting Australia for Indian travellers, with 22 per cent citing the high cost of travelling around and 21 per cent indicating the airfare expense. They were also more likely than other markets to cite the higher Australian dollar as a barrier.

Top five barriers to visiting Australia

% of those not intending to visit Australia



■ Indian travellers ■ 11 Market total²

Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

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India Market Fact Sheet



Current Indian Visitation and Expenditure in Queensland¹

Indian Overnight Visitor Expenditure (OVE) in Queensland increased by 0.9 per cent in the year ending September 2019 to \$140.5m. During the same period, Indian visitor numbers grew by 8.7 per cent to 82,000 and nights increased by 27.5 per cent to 2.6M.



\$140.5m spend
-0.9% year-on-year



82,000 visitors
+8.7% year-on-year



2.6m nights
+27.5% year-on-year

Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked third for consideration, and second for experience awareness and intention. Queensland is the third-most-visited state for Indian visitors.

Queensland's competitive rankings³

ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) ⁴	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

■ 2018 rank ■ 2019 rank

How to read this:
Indian travellers rank Queensland 3rd out of Australian states and territories for consideration

Australia's competitive rankings - India market

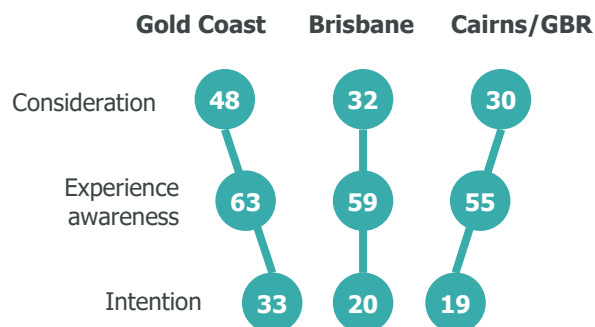
ranking against other international destinations



How to read this: Australia comes 1st in the list of destinations Indian travellers intend to visit, but ranks 6th in terms of actual visitation

Queensland destinations - India market

% of travellers considering Australia



How to read this: 48% of Indian travellers considering visiting Australia have considered visiting the Gold Coast, but only 33% intend to actually visit

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)
³ INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany
⁴ Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

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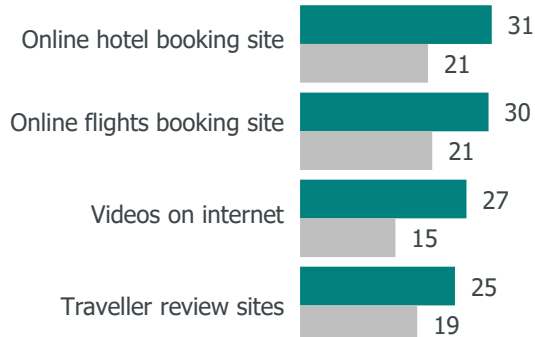


Sources for travel planning

Compared to other markets, Indian travellers are more likely to use travel websites and apps during the travel booking cycle. They are also more likely to source inspiration from online booking sites, internet videos, and traveller review sites.

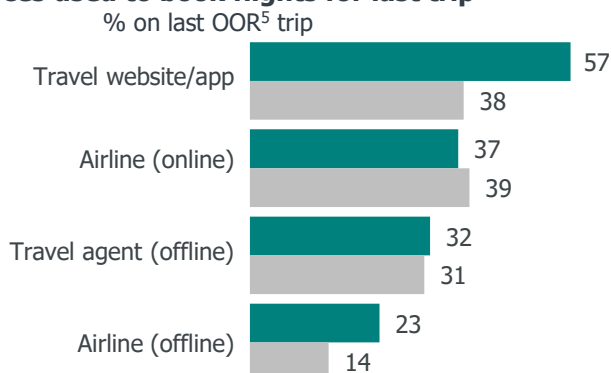
Sources of inspiration for last trip

% on last OOR⁵ trip



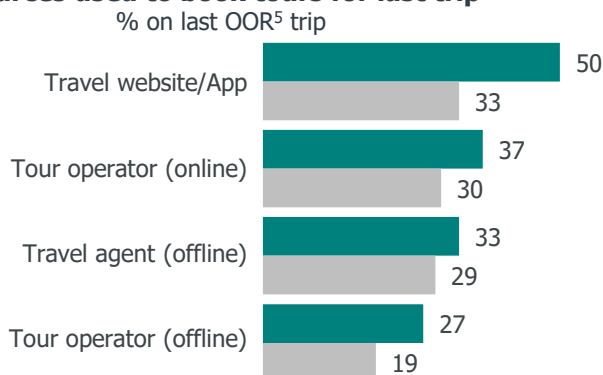
Sources used to book flights for last trip

% on last OOR⁵ trip



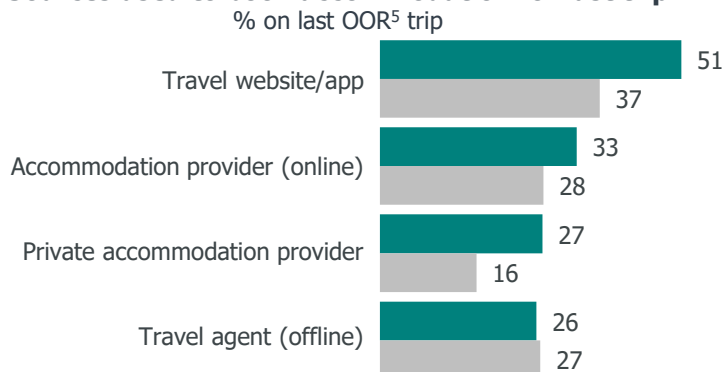
Sources used to book tours for last trip

% on last OOR⁵ trip



Sources used to book accommodation for last trip

% on last OOR⁵ trip



■ Indian travellers ■ 11 Market total²



² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

⁵ OOR Trip – Out of Region Trip (Indian travelling outside South Asia or South East Asia [excl. Guam])