INDIA
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%

1 in 4 net new jobs were created by Travel & Tourism over the last five years

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>Share of Total Economy</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>0%</td>
</tr>
<tr>
<td>Automotive</td>
<td>5%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>10%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>15%</td>
</tr>
<tr>
<td>Retail</td>
<td>20%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>25%</td>
</tr>
</tbody>
</table>

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

INDIA 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

6.8% OF TOTAL ECONOMY
Total T&T GDP = INR13,681.1BN (USD194.3BN)

+4.9%
2019 Travel & Tourism GDP growth vs +4.9% real economy GDP growth

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

39,821.8 JOBS (000's)
(8.0% of total employment)

INTERNATIONAL VISITOR IMPACT

INR2,130.5BN
in visitor spend (5.6% of total exports)
(USD30.3BN)

INBOUND ARRIVALS

1. BANGLADESH 12%
2. UNITED STATES 9%
3. UNITED KINGDOM 6%
4. CANADA 2%
5. AUSTRALIA 2%
REST OF WORLD 69%

OUTBOUND DEPARTURES

1. UNITED ARAB EMIRATES 13%
2. SAUDI ARABIA 8%
3. THAILAND 8%
4. UNITED STATES 7%
5. SINGAPORE 6%
REST OF WORLD 58%

Note: Data are average shares over the 2016-2018 period
Source: Oxford Economics, national sources and UNWTO

SECTOR CHARACTERISTICS (2019)

<table>
<thead>
<tr>
<th>Domain</th>
<th>Share of Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>LEISURE SPENDING</td>
<td>94%</td>
</tr>
<tr>
<td>BUSINESS SPENDING</td>
<td>6%</td>
</tr>
<tr>
<td>DOMESTIC SPENDING</td>
<td>83%</td>
</tr>
<tr>
<td>INTERNATIONAL SPENDING</td>
<td>17%</td>
</tr>
</tbody>
</table>

1All values are in constant 2019 prices & exchange rates
As reported in March 2020