

Assessment of International Media Campaigns of the Ministry of Tourism for Australia

Final Report

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Market Research
Division
Ministry of Tourism
Government of India



सत्यमेव जयते
Government of India

ACNielsen ORG-MARG Private Limited

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Executive Summary

More than 150 countries around the world promote tourism as a revenue generating arm of the economy. Tourism, wellness and experience go hand in hand to promote a destination. Publicity and marketing is an important aspect for success of a destination. The Government of India under the Ministry of Tourism has endeavoured to promote sites and destinations in the international market through global advertising campaigns in the Print, Television and Online mediums. The present study was awarded to ACNielsen ORG-MARG as part of a two-phase assignment to carry out an 'Assessment of International Media Campaigns' in three source countries of United States of America (USA), France and Australia.

The study was conducted in two phases, Phase I of the study focussed on assessing the reach, quality, effectiveness and perception of people in the source country. The study findings pointed out to the excellent quality, theme and appearance of the ads while the overall perception towards the ads were rated as good, which was reinforced by past travellers to India. Phase II of the study aimed to assess the impact and the effectiveness of the advertisements in building India's image as a future tourist destination assess the impact of media campaigns on traveller's decisions travelling abroad in the coming one year. The survey findings point out towards a positive impact of Incredible India campaigns on the targeted masses although the same has not translated into immediate travel bookings to India.

The survey findings reveal inclination of significant number of respondent travellers from France and USA to travel to India after watching the ads. The same is not so encouraging in the case of Australia where the respondents preferred traveling to destinations closer at hand such as Fiji and Indonesia. India as a travel destination is high on the list of travellers as mentioned by significant number of travellers, who are travelling to India in the coming one year without watching the advertisements. In the case of Australia a significant number of travellers are planning to visit India, even without watching the ad campaigns.

The survey covered travellers planning to visit other countries in the coming one year, which revealed small but significant impact on respondents, who have decided to change their travel bookings to visit India in the coming one year after watching the Incredible India campaign ads.

Amongst travellers visiting other countries, the Incredible India campaigns, have positively impressed and registered in their minds. According to respondents, they will consider India in their future travel plans although they cannot cancel their trips to their present destinations.

Respondents travelling to other countries either liked the advertisements of the particular destination countries or wanted to visit the country, for which they made bookings for the destination. In the case of Australia, a large number of respondents relied on judgements and experiences of friends and relatives prior to deciding or visiting a destination. India on the other hand is considered as a destination for leisure/holiday which needs long haul visits. Thus, cost and time were other factors that respondents considered while deciding upon destination.

According to respondents, there is a general lack of information and discussion on India in the host countries. The neutral position of media and state tourism departments also becomes an important factor influencing traveller's decisions. Thus, all the year round targeted marketing, promotion and liaising with international tourism bodies such as UNWTO, WTTC, ITB, etc, is required with special focus on new regional and local flavours.

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CHAPTER ONE INTRODUCTION & METHODOLOGY

1.1 Background of the Study

Tourism is the fastest growing service industry across the world, worldwide tourist arrivals expected to cross the one billion mark by the end of 2012¹. The first quarter from January to June has reported an increase of +5% (22 million) international arrivals worldwide for the same period in 2011². Keeping in consonance with the international arrivals, foreign tourist arrivals to India for the same period has also increased by 7.4% (32.75 lakhs) in comparison to 2011 (30.15 lakhs) and a growth of 10.8% over the corresponding period in 2010³. Tourist statistics show a positive growth trend in foreign tourist arrivals to India for the past decade, except for a brief period in 2009 (-2.2%), when the economic recession affected travel statistics around the world. Tourism growth has been consolidated during 2012 (January-June) at 7.4% which is expected to outgrow the modest growth of 8.9% in 2011 and 11.8% in 2010. India ranks 40 sharing 0.59% of total international tourist arrivals in the country.

The government of India has been taking concerted efforts towards holistic tourism development including tourist infrastructure development, domestic and overseas promotion and publicity as well as aided research and capacity development of stakeholders in the country. For the past decade beginning 2002, Ministry of Tourism has been extensively promoting India tourism through the *Incredible India Campaigns* in the domestic and international markets. This encompasses a wide range of marketing activities, including advertising, public relations, promotions, participation in trade and consumer travel shows, production of brochures and related material and area familiarisation tours by travel industry sellers. The specific elements of promotional efforts undertaken overseas include advertising in the print and electronic media, participation in fairs and exhibitions, organising seminars, workshops, road shows and India evenings, printing of brochures and collaterals, brochure support / joint advertising with travel agents / tour operators, inviting the media and travel trade to visit the country under the hospitality programme.

The Incredible India Campaigns have generated positive interest, with desire to visit and experience the culture of India surging on the higher side. The campaigns have been launched in three different formats of television, print and online media's, with a series of commercials and advertisements. The advertisements have brought attention to the different facets and hidden treasures in India's geographic and socio-cultural diversity, belying myths prevalent in the popular mind in many parts of the world. The Incredible India Campaign has been awarded for its ingenuity and ranked the 'Highest Recall Advertisement' worldwide by Travel and Leisure.

¹UNWTO Barometer Vol 10, January 2012

²UNWTO Barometer Vol 10, September 2012,

http://dtxqt4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_barom12_05_sept_excerpt.pdf

³<http://www.incredibleindia.org/index.php/media-section/press-releases/1610-foreign-tourist-arrivals-and-foreign-exchange-earnings-in-june-2012>

Nielsen India Pvt Ltd. was awarded a two-phase assignment, to carry out an “Assessment of International Media Campaigns” in USA, France and Australia. The study aimed to assess coverage, quality and impact of the campaigns on people in three select target countries of United States of America (USA), France and Australia. The campaigns were launched in select, television channels print magazines, newspapers and websites, portals on the internet during the period of August 2011 to March 2012. The assessment focussed on three consolidated campaigns in international markets being carried out by the Ministry of Tourism, viz.

- Global Television Campaign
- Global Print Campaign
- Global Online Campaign

Phase I of the study focussed on assessing the reach, quality, effectiveness and perception of people. The study findings pointed out to the excellent quality, theme and appearance of the ads in the three countries while the overall perception towards the ads were rated as good, which was reinforced by past travellers to India.

2.1 Terms of Reference

The broad objectives and scope of the study is as follows:

A. Interaction with the Foreign Nationals

Phase I

1.1.1 Print Media:

- To assess the incidence of readership of the advertisement in the publication
- To assess the perception of the respondents regarding:
 - Location of the advertisement in the publication
 - Timing of the advertisement in the publication

1.1.2 Electronic Media:

- To assess the viewership of the campaign
- To assess the perception of the respondents regarding:

- ✚ Timing of the slot

1.1.3 Print & Electronic Media:

i. To assess the perception of the respondents regarding:

- ✚ Contents of the campaign
- ✚ Adequacy of information provided in the campaign
- ✚ Quality of the campaign
- ✚ Effectiveness of the campaign
 - Whether the campaign has increased the awareness about India?
 - Whether the campaign has changed the perception of the respondent about India?
- ✚ Whether the campaign is likely to influence the future travel behaviour of the respondents in favour of India?
- ✚ What more information / details Tourists look forward to facilitate them to travel to India?

Phase II

To assess:

- Impact of the campaign on the decision of the tourist to travel to India
- Whether the campaign has resulted in increase in attractiveness of India as travel destination amongst the respondents?

B. Interaction with the Tour Operators:

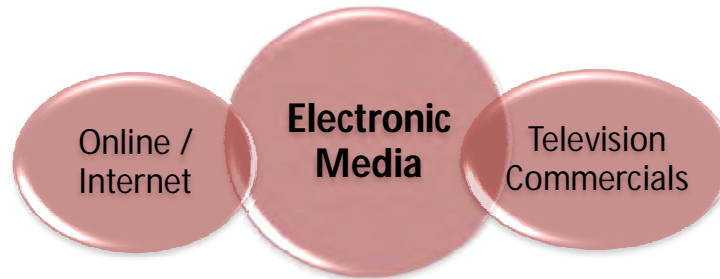
To coincide with phase I, to have an idea about the following:

- i. General desire mapping of the Outbound Tourists from the country.
- ii. Desire mapping of the tourists proposing to visit India.
- iii. The inadequacy in the publicity and marketing strategy of India in attracting the tourists.
- iv. Impression of the tour operators in sustainability of the current campaign in terms of Quality and Content.
- v. Role of India Tourism Offices in promoting India as a destination and their views regarding the role performed by these offices in promoting India as a tourist destination. Highlight the areas which need improvements along with the suggestion for improvements in their working.
- vi. Specific measures to be taken to promote India in the country.

2.2 Methodology

This study was conducted through both secondary and primary research in two phases. In the 1st phase of the study, both foreign nationals and outbound tour operators was interviewed while in the 2nd phase of the study (which will take place in June-July 2012), only foreign nationals of USA, France and Australia will be interviewed.

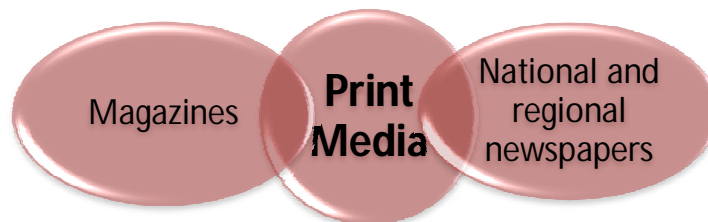
The Foreign Nationals and Outbound / International Tour Operators who are viewers of electronic media and readers of print media were interviewed for the study. Electronic Media consisted of:



Online / Internet - advertisements in

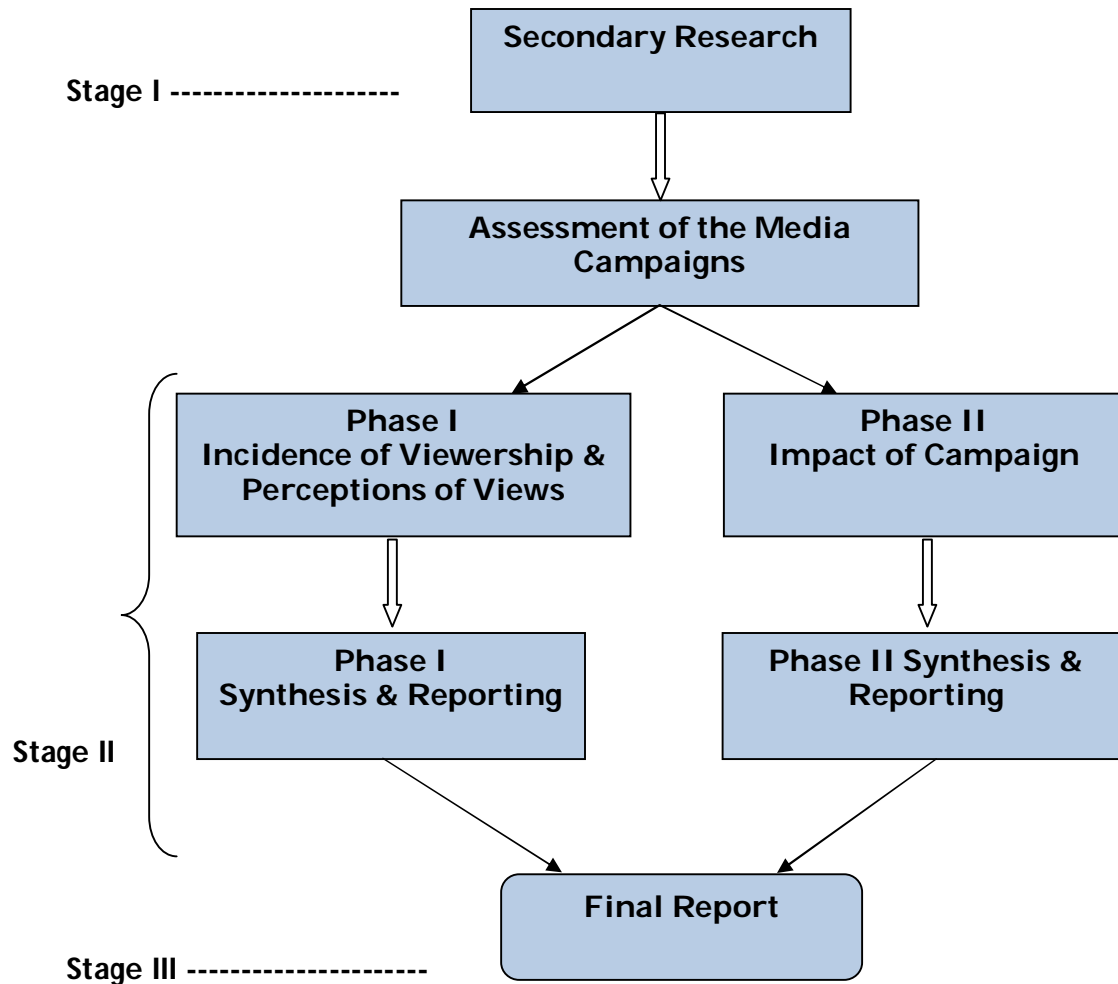
- ✚ Social networking sites like Face book
- ✚ Travel Websites
- ✚ You Tube
- ✚ Search Engines like Google, Yahoo, etc.

Print Media included:



1.3.1 Research Approach

The research approach followed for the study began with the secondary research on the three source countries of USA, France and Australia. The assessment study was carried out, across three countries of USA, France and Australia. The overall approach of the study envisaged the three following stages:



1. Stage I: Secondary Research

This stage was a short stage and created the background of the research. The study idea and implementation and the mode of implementation substantiated the preparation of the study. It constituted research and data collection from secondary sources and preparation of questionnaire. The secondary research covered

- i. Spatial Mapping of the markets / source countries of USA, France and Australia where the research was to be carried out
- ii. Reference to Literature available on -
 - Destination marketing / promotion materials
 - Media materials / Magazines / Journals
 - World Wide Web - Analysis of available online promotional materials
 - Videos

- Photos
- Maps
- Media Assessment Reports by tourism organizations and associations
- Visitor Surveys
- Tour guidebooks

iii. Preparation of Interview Schedule & Questionnaire:

Detailed questionnaires were prepared based on the secondary resources research carried out on promotional material and source market study.

- Questionnaires for travellers to India and abroad in the last two years - administered in Phase 1
- Questionnaires for travellers to India and abroad in the last two years - to be administered in Phase 2

Separate sets of questionnaires for Phase I & Phase II of the study will be prepared and administered as per the objectives of the study.

- In-depth interview questionnaire was prepared for conducting interviews with tour operators in Phase I.

This was administered to interview travel operators in the Phase I of the study

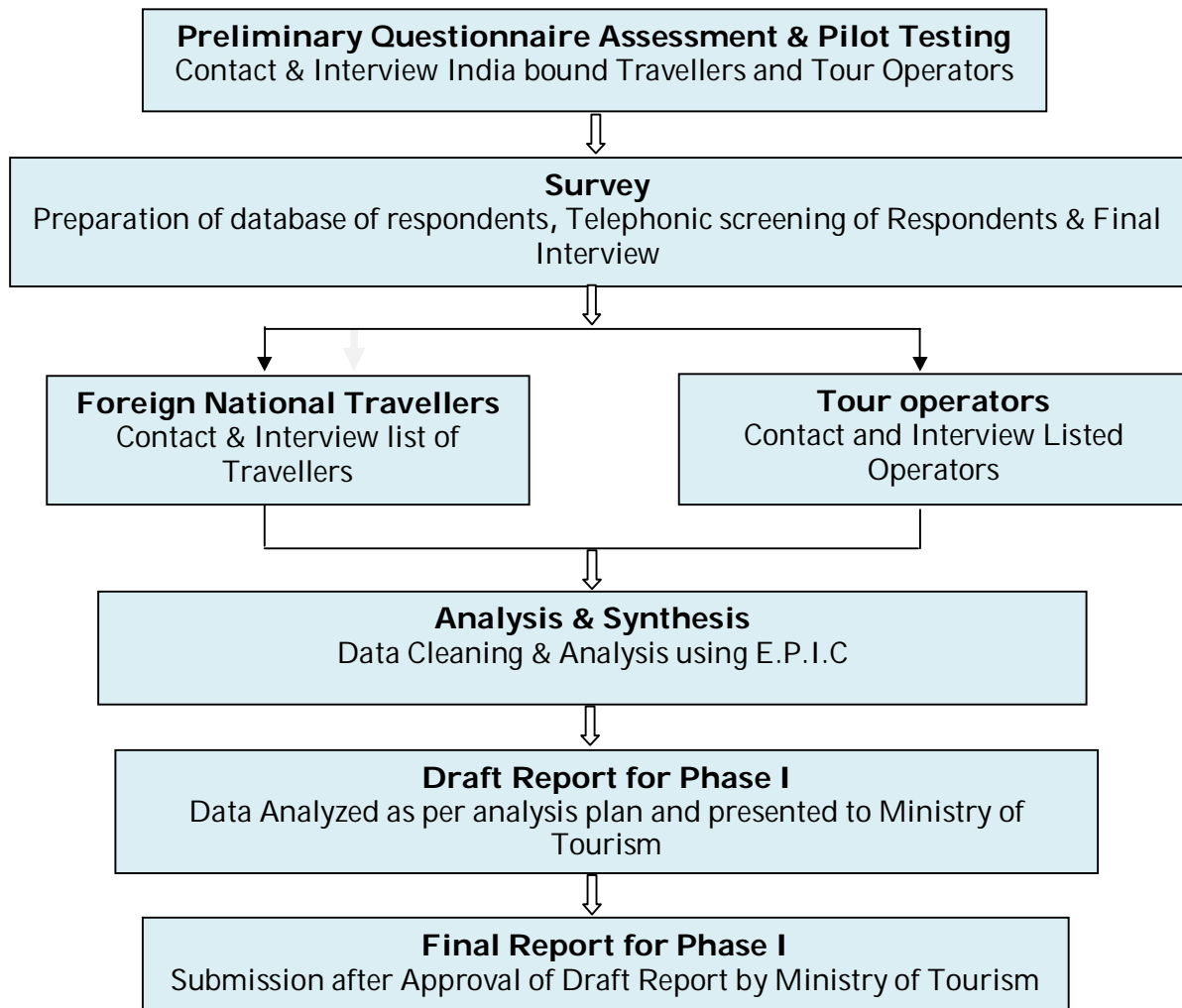
2. Stage II : Assessment of the Media Campaign

The assessment / evaluation of the media campaign will be carried out in two phases:

- Phase I &
- Phase II

A. Operational Methodology For Phase I:

In Phase I the study will research on the incidence of viewership, viewership perception, etc.



a) Selection of Respondents:

The criteria's for selection of respondents are very specific to the objectives of the research, as follows:

- Only those foreign nationals who have viewed the either or both electronic / print adverts was interviewed
- The interviewee should have travelled outside his home state in the last two years either to India or any other country

- The interviewee should be a national of the source country. Non-resident Indians (NRI's) or PIO's were not selected
- Travel being a niche segment, advertisements on travel will be viewed and also recalled by specific individuals who are travel enthusiasts or by intending travellers.

The Phase I also included interviews with Tour Operators. Tour Operators were selected in consultation with the Indian Tourism offices based in USA, France and Australia. Nielsen also relied on its tourism database to identify the source country based tour operators functioning in India. The criteria of selection also depended on whether the operator has viewed media adverts and have knowledge on the same.

b) Research Approach for Phase I:

The primary data collection and evaluation will be carried out in this phase. The primary stage of field survey corresponded with the airing of the media campaigns in the visual, online and print media. The survey was carried out during the first phase for two distinct categories of informants:

- **Conducting Interviews of Respondents:**

∞ Interviews of Past travellers to India or any Other Country

The past travellers to India or any other country were the primary informers in this stage. The survey analysis was undertaken on the feedback provided by the foreign nationals who have viewed the media campaigns. The interviews evaluated the effectiveness and impact of the media campaigns in the print / visual and online mediums by assessing the viewer's perceptions and impact of the advertisements.

Information Areas:

- ✚ Perceptions of viewers on the
 - Location of Advertisement
 - Timing of the Slot
 - Quality of the Campaign

- Effectiveness of the Campaign
- Adequacy of the Campaign
- Impact of the Campaign on the Decision-making of the traveller
- Information sought by the traveller

- **In-depth Interviews with Tour Operators:**

This evaluated the effectiveness of the campaigns as perceived by the tour operators. Tour operators and travel agents exert a very important role in providing vital information to the people in their respective countries. They are in many cases the first point contact for the traveller who is less informed about the country. Their perception of the campaign will further also influence the decision-making of any prospective traveller. Thus, the impression created on the tour operator is also an important indicator to the acceptance levels of the tourist destinations in the source market countries.

Information Areas:

- ✚ Identify the lacunas and highlight areas of improvement along with suggestions for improvements for higher reach Interviews with Operators to assess their perception / views on the
 - Suitability of the Campaign
 - Mapping of the tourists proposed to be visiting India
 - Inadequacy in the publicity & marketing strategy of India in attracting tourists
 - Specific measures to be taken to promote India in the source market country
 - Role of India tourism Offices in promoting India as a tourist destination

- ✚ Interviews with India Tourism Offices to assess

Their role in tourism promotion and development is vital to the growth of the industry. The India tourism offices and the Indian embassy officials were interviewed so as to collect valuable information on

- tourist travel enquiries made during the period of the campaign
- Type of inquiries were sought with respect to the tourist destinations after viewing the campaigns

Process of Conducting the Survey in Phase I:

Viewers in the respective three countries of USA, France & Australia were identified through reliable sources. In the first phase of the interviews viewers were first screened through on basic criteria's of viewership and finally selected for final interviews. The questionnaires were administered on the selected sample by the following processes:

- *Computer Aided Telephonic Interviews (CATI):*

The questionnaires were administered through telephonic interviews, during which the questionnaire were administered and information collected. The final database after screening of the respondents was used for the interviews that were conducted by the CATI method. The final interviews are **90% telephonic and 10% face-to-face interviews**. The ratio of telephonic to face-to-face was the same for all three countries. *Computer Aided Telephonic Interviews (CATI)* is an effective method to reach to the foreign nationals. The respondents in the mentioned locations are more comfortable with providing information telephonically due to their fast lifestyle and lack of time and convenience of not having a visual medium.

- *Face to face Interviews:*

Interviews were also set aside to be administered on foreign nationals willing to give appointment. The questionnaires were filled up by the same on the spot at the time of the appointments. About **10% of the interviews** were conducted **face-to-face**. In the phase of the study tour operators were also interviewed with respect to the efficacy of

the media campaigns. Face-to-face interviews were conducted with 30 tour operators from each country.

2.3 Sample Covered

The sample of respondents covered in the Phase 1 of the study is as follows.

Country	Category of Respondents		Total
	Past India Travellers	Past Other Country Travellers	
Australia	606	456	1062

The total number of respondents who were contacted for the survey, is as follows

	AUSTRALIA
Completed Sample / Interviews	1062
Targeted Respondents for Achieving Sample	5359
Incidence / Hit Rate	20%

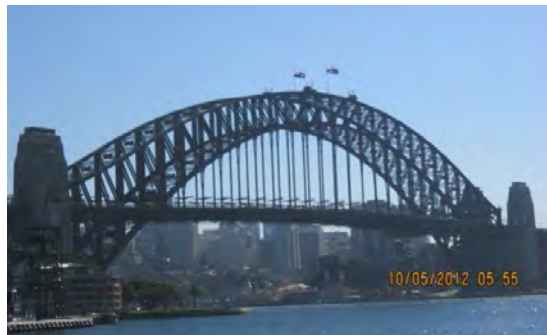
CHAPTER TWO PHASE - I

2.0 Brief Introduction to the Country - Australia

Australia, officially known as the Commonwealth of Australia, is a highly developed country with the world's 13th largest economy. The world's smallest continent and sixth largest country by total area, Australia—owing to its size and isolation—is often dubbed the "island continent", and is sometimes considered the world's largest island. Australia has six states—New South Wales, Queensland, South Australia, Tasmania, Victoria, and Western Australia—and two major mainland territories—the Northern Territory and the Australian Capital Territory (ACT).



Australia has a market economy with high GDP per capita and a low rate of poverty. The Australian dollar is the currency for the nation. Australia was founded with the influx of European settlers just over two hundred years ago, although the original inhabitants, the aborigines, had inhabited the continent for tens of thousands of years before that.



A predominantly urban nation (89% of the total Australian population lived in towns and cities as of 2010), it is estimated that between 2010 and by 2015 the nation will see a 1.2% annual rate of urbanization. The major cities of Australia are Sydney, Melbourne, Adelaide, Brisbane, Perth, Gold Coast, etc and the capital of Australia is Canberra.

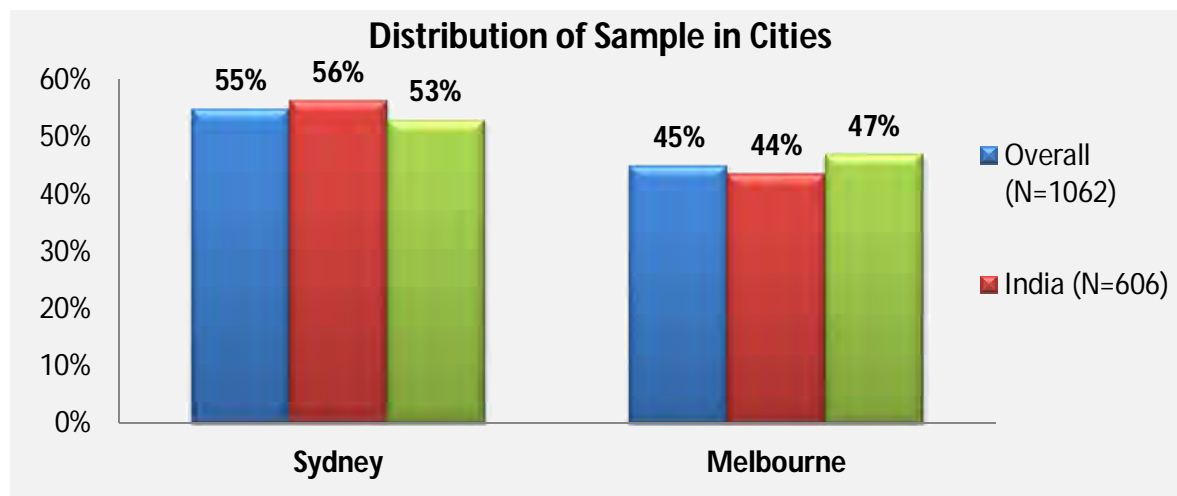
2.1 Primary Study Findings - Australia

2.1.1 Demography of Travellers

A total of 1062 travellers were interviewed in the country of Australia. 606 of the 1062 respondents were travelers who have visited India in the past and the remaining 456 were travelers who have visited countries other than India in the past.

2.1.1.1 Distribution of Travellers in Cities

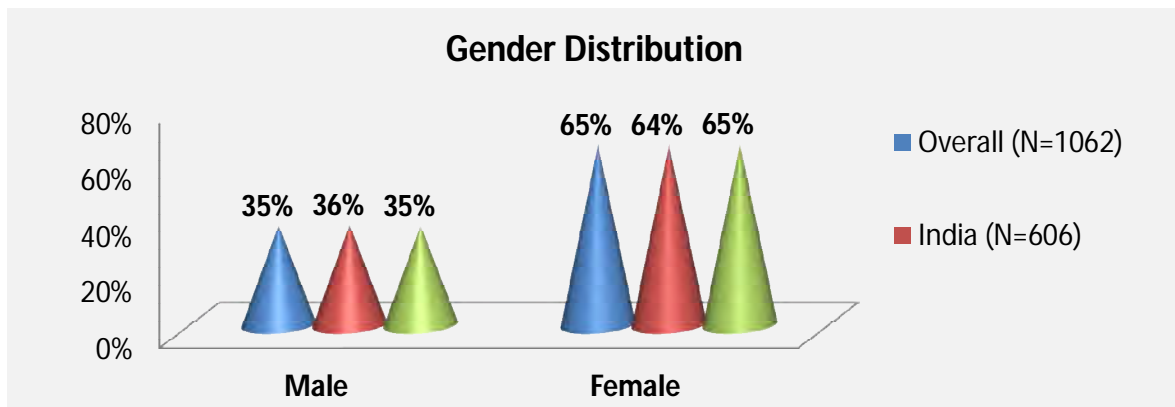
55% of the travellers (584) were interviewed in Sydney and 45% of the travellers (478) in Melbourne. Not much difference exists between past travellers to India and past travellers to other countries with respect to city of residence in Australia.



2.1.1.2 Gender Distribution of Travellers

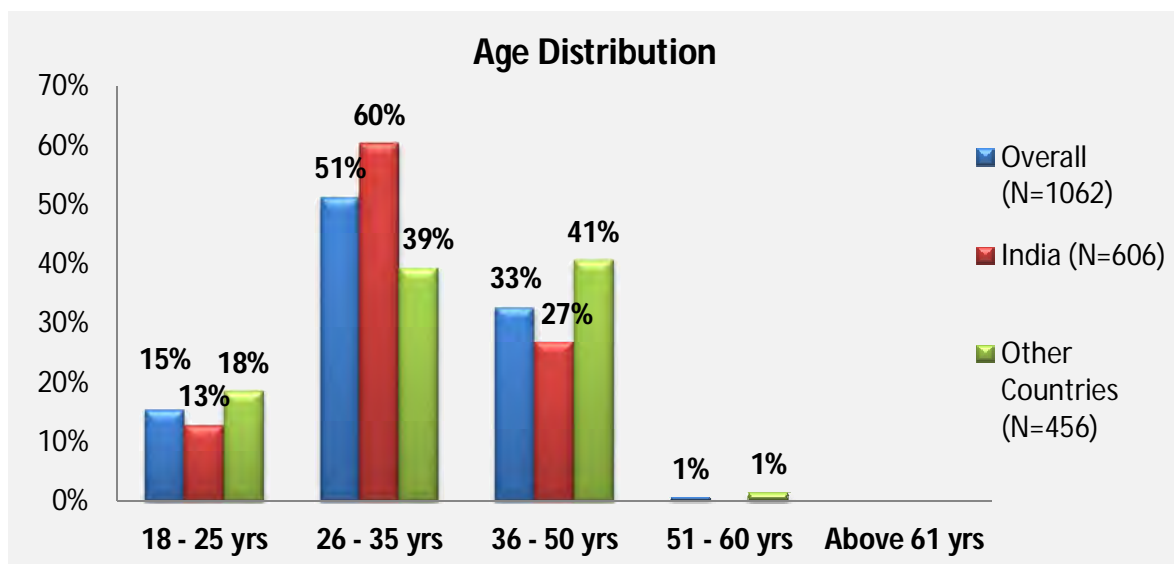
35% of the travellers (377) were males and 65% of the travellers (685) were females. Irrespective of whether the respondents are past travellers

to India or past travellers to other countries, proportion of women is almost double than that of men.



2.1.1.3 Age Distribution of Travellers

Majority of travellers belong to the age group of 26 to 50 years (86% of total 1062 travellers surveyed in Australia). Out of the majority, 51% belongs to the age group of 26-35 years and the rest 33% belong to the age group of 36-50 years. 15% of the travellers each belong to the age group of 18-25 years and 1% was 51-60 years of age. Only 2 travellers interviewed were above 61 years of age. The age group of 26-35 years majorly comprised of past travellers to India, whereas, the age group of 36-50 years comprised more of past travellers to other countries.



2.1.2 Travel Behaviour

2.1.2.1 Countries Travelled in Past by Travellers

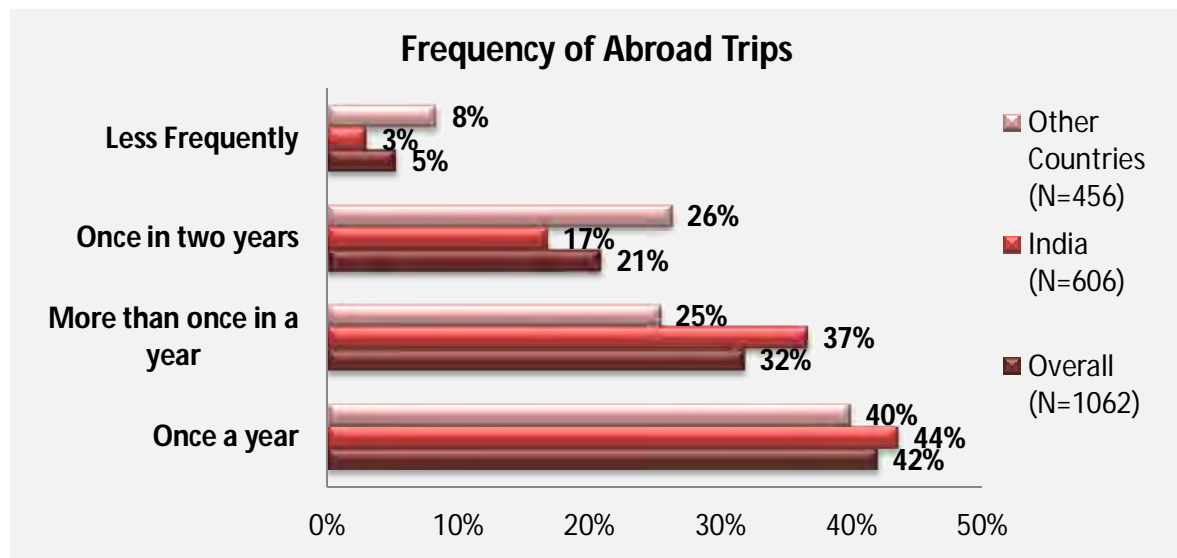
606 travellers (57% of total interviewed in Australia) had travelled to India in the past. 456 travellers had travelled to other countries in the past. Out of the other countries visited by 456 travellers from Australia, Malaysia is the top most with 12% (350 visits) of total visits, followed by Thailand with 10% of total visits (288 visits).

	Frequency	Percent
India	606	57%
Other	456	43%
Total	1062	100%

Country	Frequency	Percent
USA	270	9%
UK	234	8%
France	146	5%
Italy	156	5%
Spain	90	3%
Germany	149	5%
Malaysia	350	12%
Indonesia	131	4%
Thailand	288	10%
China	213	7%
Japan	145	5%
Australia	0	0%
UAE	116	4%
Russia	38	1%
Other North American Countries	74	3%
Latin American Countries	64	2%
Other European Countries	147	5%
Other Middle Eastern Countries	58	2%
Other Asian Countries	272	9%
Total	2941	100%

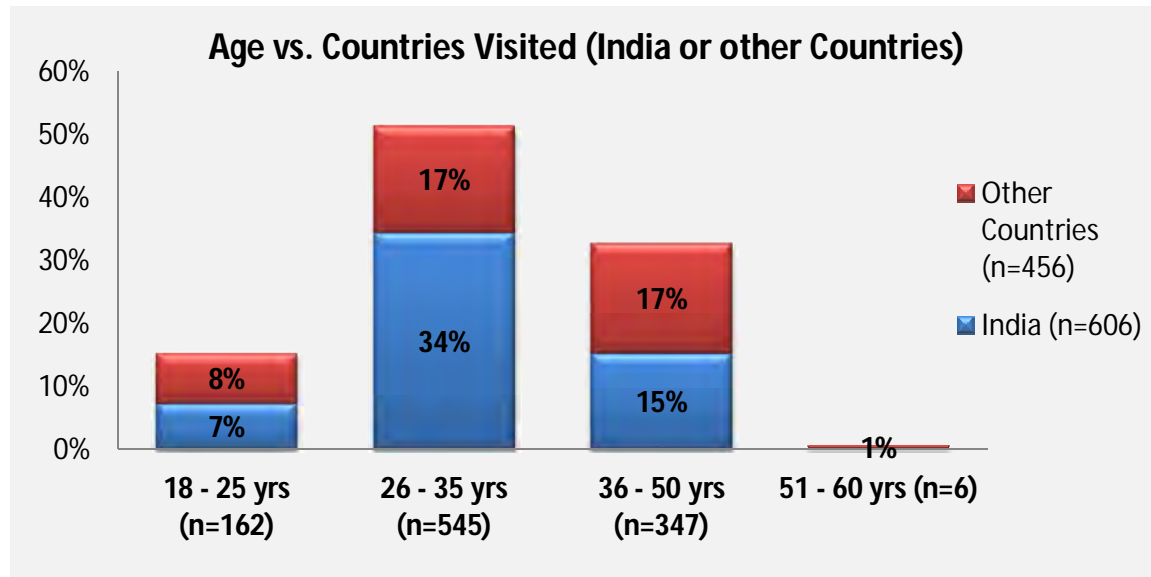
2.1.2.2 Frequency of Abroad Trips by Travellers

32% of the travellers from Australia travel abroad more than once annually. 42% of the total (446 respondents) mentioned that they travel abroad once in a year. 21% of the total respondents from Australia travel once in 2 years while the remaining 5% travel abroad less frequently.



2.1.2.3 Age of Travellers against Countries Travelled in Past

34% of the total respondents belong to the age group of 26-35 years and have visited India in the past followed by 15% of travellers belonging to age group of 36-50 years and having travelled to India. 17% each of the total travellers have visited countries other than India in the recent past and belong to the age group of 26-35 years and 36-50 years.



2.1.2.4 Age of Travellers against Other Countries Travelled

Travellers belonging to the age group of 26-35 years have mostly travelled to Malaysia (6.6%), Thailand (4.8%) and USA (4.6%). 3.7% of total respondents (108 visits by travellers), belonging to the age group of 36-50 years, have travelled to United States of America.

Country	18 - 25 yrs	26 - 35 yrs	36 - 50 yrs	51 - 60 yrs	Above 61 yrs	Total
USA	25	136	108	1	0	270
UK	39	108	85	0	2	234
France	49	54	40	1	2	146
Italy	37	72	46	1	0	156
Spain	16	50	22	2	0	90
Germany	24	78	44	3	0	149
Malaysia	59	193	95	3	0	350
Indonesia	31	62	38	0	0	131
Thailand	44	141	101	2	0	288
China	36	115	59	3	0	213
Japan	13	84	45	3	0	145
Australia	0	0	0	0	0	0
UAE	19	64	33	0	0	116
Russia	6	30	2	0	0	38
Other North American Countries	14	36	23	1	0	74

Latin American Countries	3	39	22	0	0	64
Other European Countries	31	64	52	0	0	147
Other Middle Eastern Countries	2	31	25	0	0	58
Other Asian Countries	65	108	97	2	0	272
Total	513	1465	937	22	4	2941

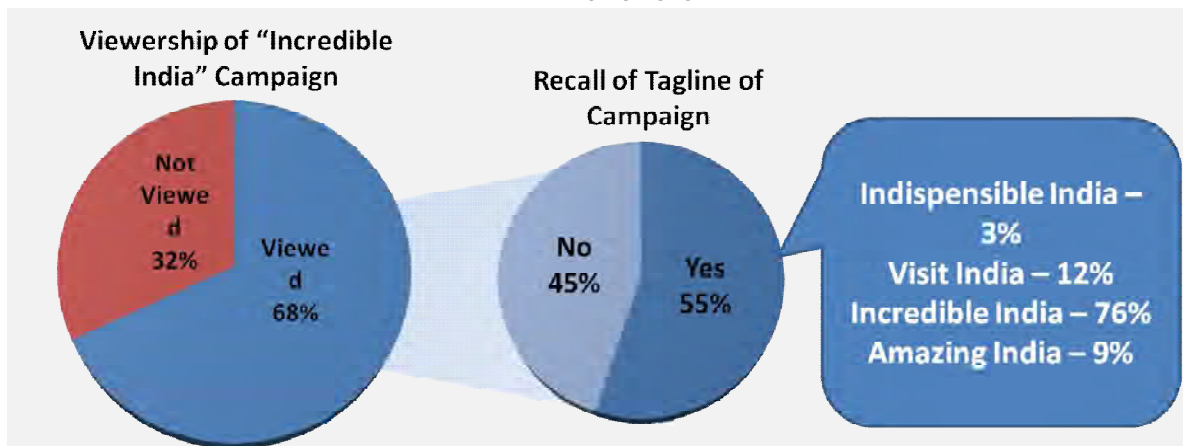
Country	18 - 25 yrs	26 - 35 yrs	36 - 50 yrs	51 - 60 yrs	Above 61 yrs	Total
USA	0.9%	4.6%	3.7%	0.0%	0.0%	9.2%
UK	1.3%	3.7%	2.9%	0.0%	0.1%	8.0%
France	1.7%	1.8%	1.4%	0.0%	0.1%	5.0%
Italy	1.3%	2.4%	1.6%	0.0%	0.0%	5.3%
Spain	0.5%	1.7%	0.7%	0.1%	0.0%	3.1%
Germany	0.8%	2.7%	1.5%	0.1%	0.0%	5.1%
Malaysia	2.0%	6.6%	3.2%	0.1%	0.0%	11.9%
Indonesia	1.1%	2.1%	1.3%	0.0%	0.0%	4.5%
Thailand	1.5%	4.8%	3.4%	0.1%	0.0%	9.8%
China	1.2%	3.9%	2.0%	0.1%	0.0%	7.2%
Japan	0.4%	2.9%	1.5%	0.1%	0.0%	4.9%
Australia	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
UAE	0.6%	2.2%	1.1%	0.0%	0.0%	3.9%
Russia	0.2%	1.0%	0.1%	0.0%	0.0%	1.3%
Other North American Countries	0.5%	1.2%	0.8%	0.0%	0.0%	2.5%
Latin American Countries	0.1%	1.3%	0.7%	0.0%	0.0%	2.2%
Other European Countries	1.1%	2.2%	1.8%	0.0%	0.0%	5.0%
Other Middle Eastern Countries	0.1%	1.1%	0.9%	0.0%	0.0%	2.0%
Other Asian Countries	2.2%	3.7%	3.3%	0.1%	0.0%	9.2%
Total	17.4%	49.8%	31.9%	0.7%	0.1%	100.0%

2.1.3 “Incredible India” Advertisement Campaign

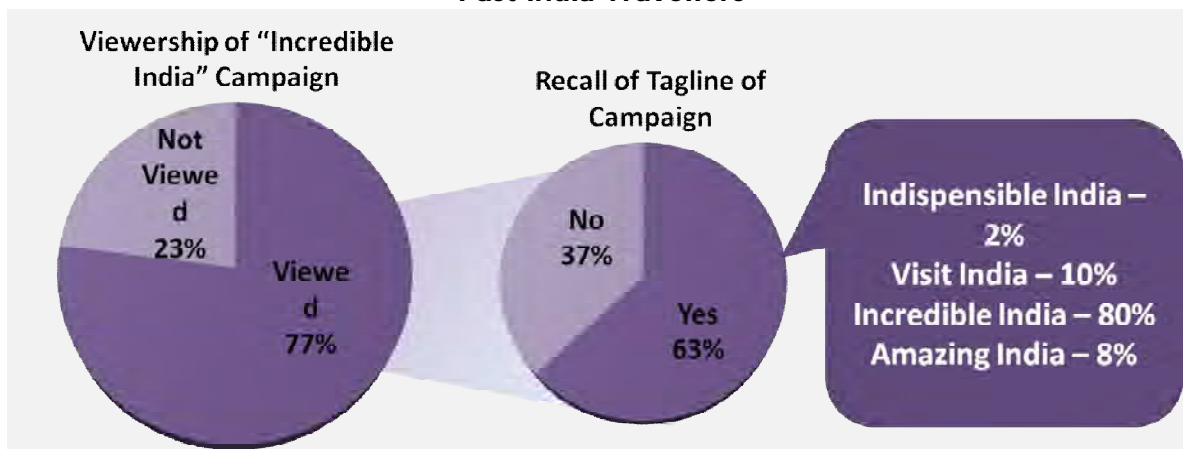
2.1.3.1 Viewership of Any “Incredible India” Campaign

68% of the total 1062 respondents mentioned that they have seen “Incredible India” campaigns. Out of the 68% who have viewed it, 55% mentioned that they could recall the tagline of the campaign. Out of the 55% who could recall the tagline, 76% could recall the Tagline of “Incredible India” exactly. Past travellers to India from Australia viewed past campaigns of “Incredible India” and could recall the tagline more than the past travellers to other countries.

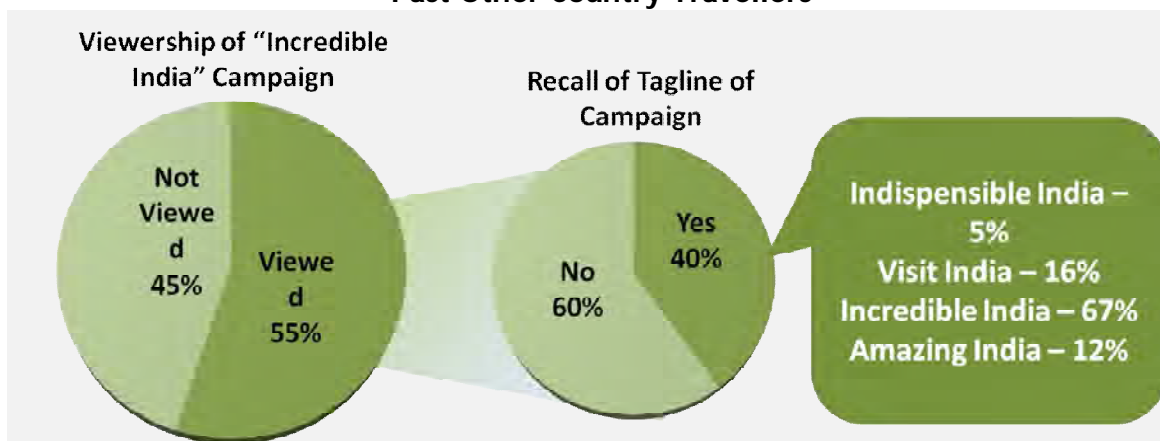
All Travellers



Past India Travellers



Past Other Country Travellers

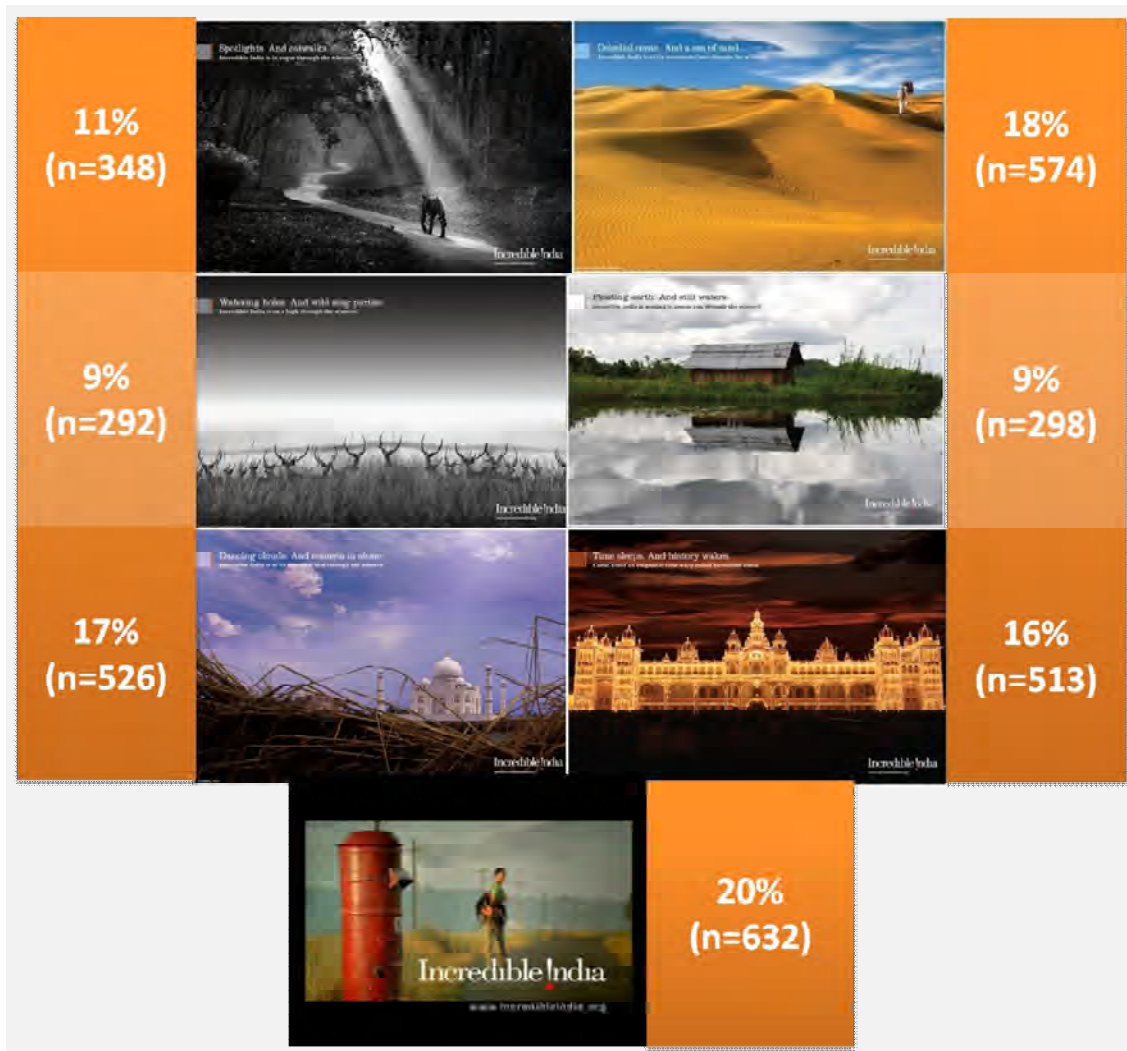


2.1.3.2 Viewership of Current Advertisements of the Campaign

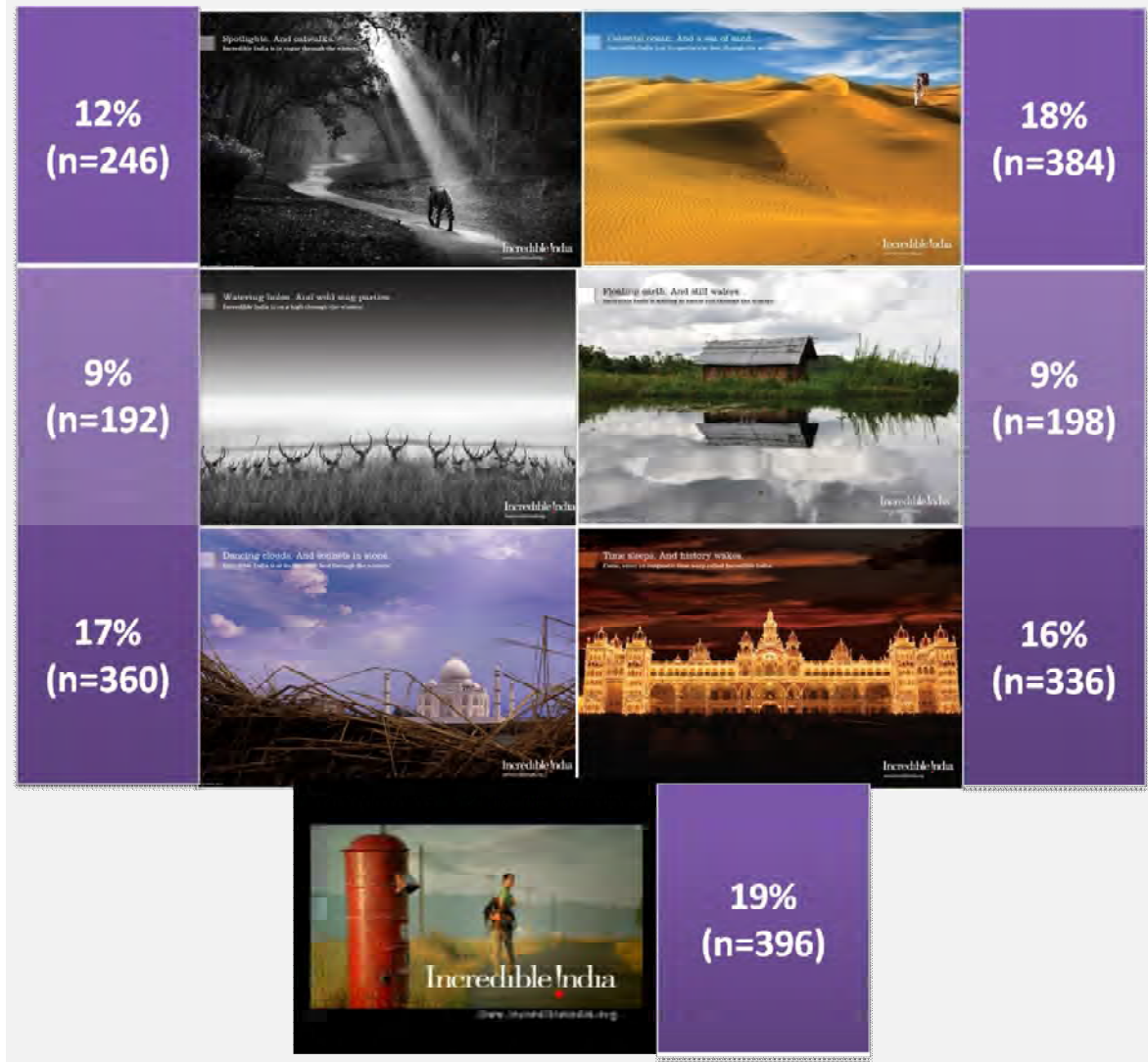
Out of the 6 print advertisements and 1 video advertisement, the most viewed print advertisement and second most viewed advertisement of all,

was the “Celestial Ocean” ad featuring the deserts of India. The most viewed advertisement was the video (20%), the third most viewed advertisement was the Taj Mahal (17%) followed by Mysore palace (16%). The least viewed advertisement was the print advertisement featuring stags in Corbett national Park (9%, 292 respondents viewed it). Past travellers to other countries from Australia viewed the video advertisement more than the past travellers from Australia to India.

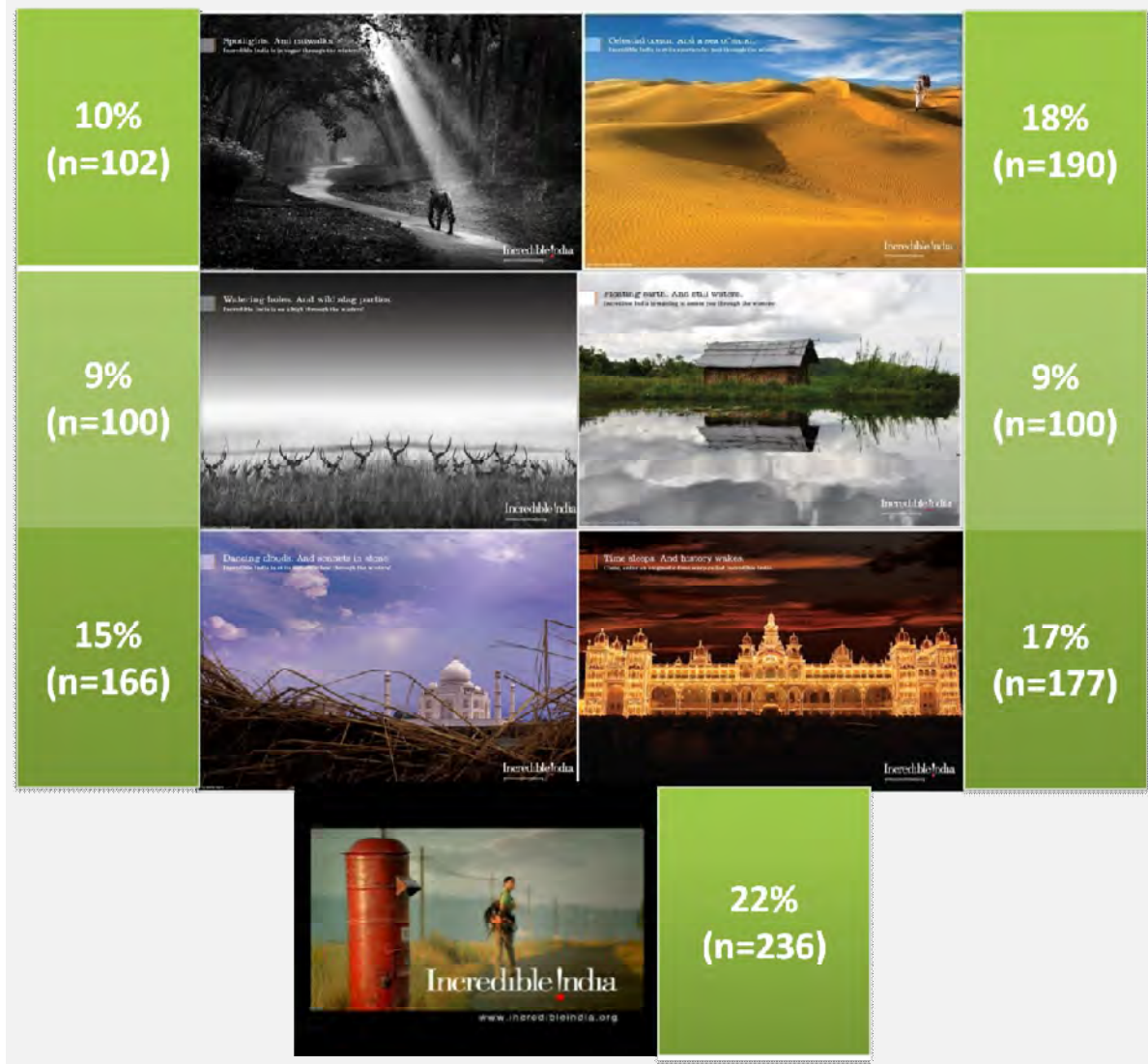
All Travellers



Past India Travellers



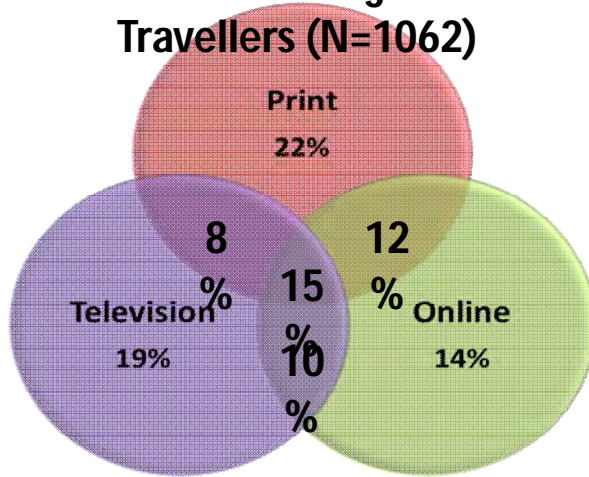
Past Other Country Travellers



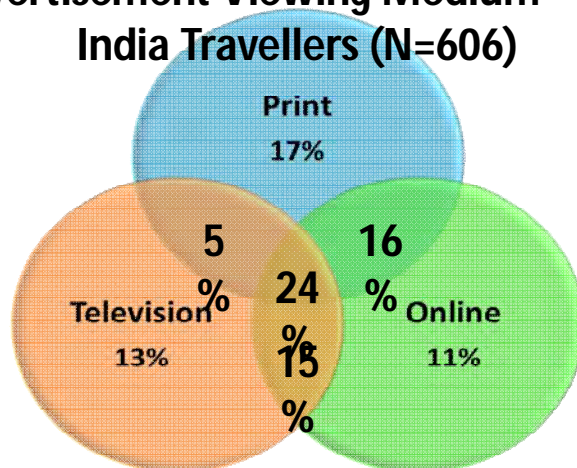
2.1.3.3 Advertisement Viewing Medium

22% of the total 1062 respondents saw the advertisements in the print media only. 15% of the total 1062 respondents saw the advertisements in all the three mediums of print, television and online. 14% of the total 1062 respondents mentioned that they saw the advertisements only online and 19% only in television. Past travellers to other countries viewed the advertisements more in only print, television and online mediums, whereas, past travellers to India watched the advertisements more in all the three mediums simultaneously.

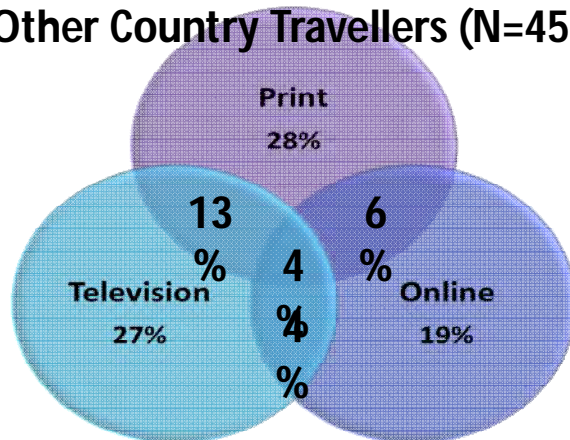
Advertisement Viewing Medium – All Travellers (N=1062)



Advertisement Viewing Medium – Past India Travellers (N=606)



Advertisement Viewing Medium – Past Other Country Travellers (N=456)



2.1.3.4 Television Channel in Which Advertisement was Viewed

In Australia, BBC (15%, 264 views) followed by National Geographic Channel (15%, 254 views) and Travel Channel (14%, 238 views), were the channels where the video advertisement was most viewed. Euro News and Euro Sports were the channels where the video advertisement was least viewed, where only 1% (23 and 22 views respectively) of total views of the advertisement was reported. Past travellers to other countries viewed the advertisement most in Discovery and the past travellers to India watched the advertisement more on BBC.

Television	Overall		India		Other Countries	
	n	%	n	%	n	%
CNN	89	5%	66	5%	23	5%
CNN Airport Network	47	3%	36	3%	11	2%
BBC	264	15%	198	16%	66	14%
Sky News	57	3%	30	2%	27	6%
National Geographic Channel	254	15%	186	15%	68	14%
CBS	61	4%	48	4%	13	3%
Travel Channel	238	14%	168	13%	70	14%
Discovery	229	13%	156	13%	73	15%
Dmax	24	1%	18	1%	6	1%
TLC	28	2%	18	1%	10	2%
History	78	5%	60	5%	18	4%
Veria Health Channel	28	2%	24	2%	4	1%
Animal Planet	95	5%	72	6%	23	5%
Euro News	23	1%	18	1%	5	1%
Euro Sports	22	1%	12	1%	10	2%
CNBC	44	3%	36	3%	8	2%
MTV	58	3%	48	4%	10	2%
Any Other	94	5%	54	4%	40	8%
Total	1733	100%	1248	100%	485	100%

Other Television Channels	Overall		India		Other Countries	
	n	%	n	%	n	%
Cannot remember exactly which channel	34	36%	6	11%	28	70%
ABC	1	1%	0	0%	1	3%
Channel 7	29	31%	24	44%	5	13%
Channel 9	8	9%	6	11%	2	5%
SBS	20	21%	18	33%	2	5%
Ten	2	2%	0	0%	2	5%

Total	94	100%	54	100%	40	100%
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2.1.3.5 Newspapers / Magazines Where the Advertisements was Viewed

Amongst Global and Australian print media, The Sunday Magazine (15.2%, 167 views) of the print ads was reported by respondents. The second highest magazine where the print advertisements were viewed was The Weekend Australian Magazine with 14.8% (163 views). The least views of print ads was reported from Associations & Meeting International (1.4%, 15 views). Amongst "other" mediums where the print advertisements was most viewed were Indian Magazines and Newspapers (12 views). The Weekend Australian Magazine was one of the newspaper/magazine, where the print advertisements were more sighted by past other country travellers.

Print (Global + Australia)	Overall		India		Other Countries	
	n	%	n	%	n	%
Harvard Business Review	27	2.5%	24	3.1%	3	1.0%
International Herald Tribune	57	5.2%	48	6.2%	9	2.9%
Conference + Meetings World Magazine	30	2.7%	24	3.1%	6	2.0%
Wall Street Journal Magazine Global	38	3.4%	30	3.8%	8	2.6%
The Economist	39	3.5%	30	3.8%	9	2.9%
Financial Times Worldwide special reports	16	1.5%	12	1.5%	4	1.3%
How To Spend It	25	2.3%	18	2.3%	7	2.3%
Global Traveler	104	9.4%	78	10.0%	26	8.5%
Associations & Meeting International	15	1.4%	12	1.5%	3	1.0%
Reader's Digest	38	3.4%	18	2.3%	20	6.5%
Australian Gourmet Traveller	156	14.2%	102	13.1%	54	17.6%
Sunday Magazine	167	15.2%	102	13.1%	65	21.2%
The Weekend Australian Magazine	163	14.8%	114	14.6%	49	16.0%
Wish	19	1.7%	12	1.5%	7	2.3%
Air France In-flight Magazine	50	4.5%	42	5.4%	8	2.6%
Delta Sky (In-flight Magazine of Delta Airlines)	94	8.5%	66	8.5%	28	9.2%
Any Other(specify)	64	5.8%	48	6.2%	16	5.2%
Total	1102	100.0%	780	100.0%	306	100.0%

USA & French Print Media	Overall	India	Other Countries
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	n	%	n	%	n	%
Harper's Bazaar	42	5.6%	30	5.7%	12	5.3%
Grand Reportage	13	1.7%	6	1.1%	7	3.1%
Elle	22	2.9%	18	3.4%	4	1.8%
Le Nouvel Observateur	8	1.1%	6	1.1%	2	0.9%
Serie Limitee	28	3.7%	24	4.5%	4	1.8%
Forbes Magazine	32	4.2%	24	4.5%	8	3.6%
New York Times T Magazine	34	4.5%	24	4.5%	10	4.4%
Washington Post Magazine	17	2.3%	12	2.3%	5	2.2%
Chicago Tribune Magazine	14	1.9%	12	2.3%	2	0.9%
Chronicle Magazine	39	5.2%	36	6.8%	3	1.3%
Robb Report	19	2.5%	12	2.3%	7	3.1%
The New Yorker	35	4.6%	24	4.5%	11	4.9%
Fortune US	24	3.2%	18	3.4%	6	2.7%
National Geographic Traveller	145	19.3%	102	19.3%	43	19.1%
American Express Publications	265	35.2%	168	31.8%	97	43.1%
Conde Nast Traveler	16	2.1%	12	2.3%	4	1.8%
Total	753	100.0%	528	100.0%	225	100.0%

Other Print Media	Overall		India		Other Countries	
	n	%	n	%	n	%
Cannot Recall	29	45%	0	0%	29	85%
Air Asia Magazine	6	9%	6	20%	0	0%
Indian Embassy	6	9%	6	20%	0	0%
Indian Magazine/Newspaper	12	19%	12	40%	0	0%
Herald Sun	2	3%	0	0%	2	6%
Qantas	6	9%	6	20%	0	0%
The Age	3	5%	0	0%	3	9%
Total	64	100%	30	100%	34	100%

2.1.3.6 Online Media Where the Advertisements was Viewed

You Tube (22.6%, 328 views), followed by Yahoo (20.8%, 302 views) were the websites where the advertisements were most viewed. Eurosports.com with 3.5% views (51 views) was the website where the advertisements were least viewed. Amongst past travellers to India, Yahoo and You tube was the websites where they viewed the advertisements the most. For past travellers to other countries, YouTube followed by

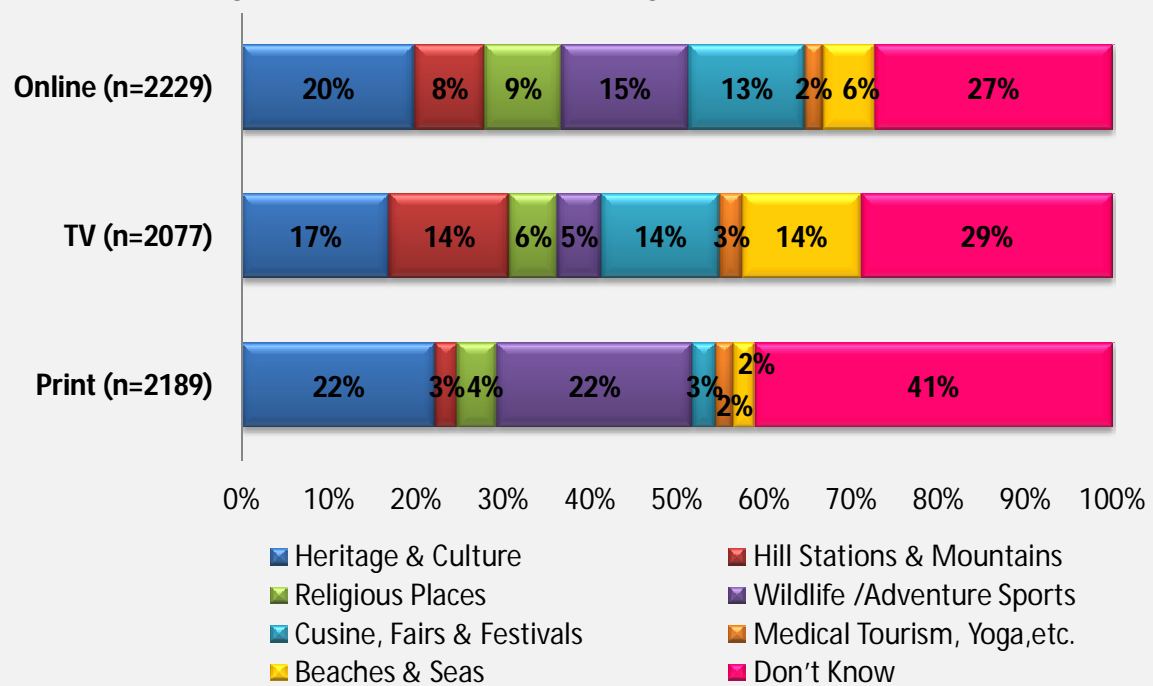
Facebook were the websites where they viewed the advertisements the most.

Online	Overall		India		Other Countries	
	n	%	n	%	n	%
BBC.com	120	8.3%	96	8.3%	24	8.1%
Eurosports.com	51	3.5%	48	4.2%	3	1.0%
CNBC.com	72	5.0%	60	5.2%	12	4.0%
LinkedIn	90	6.2%	78	6.8%	12	4.0%
Facebook	282	19.4%	216	18.8%	66	22.1%
CondeNast Traveller	64	4.4%	54	4.7%	10	3.4%
Trip advisor	141	9.7%	96	8.3%	45	15.1%
Yahoo	302	20.8%	252	21.9%	50	16.8%
You Tube	328	22.6%	252	21.9%	76	25.5%
Total	1450	100.0%	1152	100.0%	298	100.0%

2.1.3.7 What the Advertisements Showcased Against the Viewing Medium

41% of the respondents who viewed the advertisements in the print media didn't find clarity at all in what the advertisements were showcasing. Less number of respondents, who viewed the advertisements in the online (27%) and television (29%) mediums, felt the same way. Past India travellers who viewed the advertisements in print and online media, felt that the advertisements showcased Heritage and Culture of India and also the wildlife and adventure sports in India. Past other country travellers who viewed the advertisement in television, felt that the advertisement showcased the heritage and culture of India and the hill stations and mountains in India.

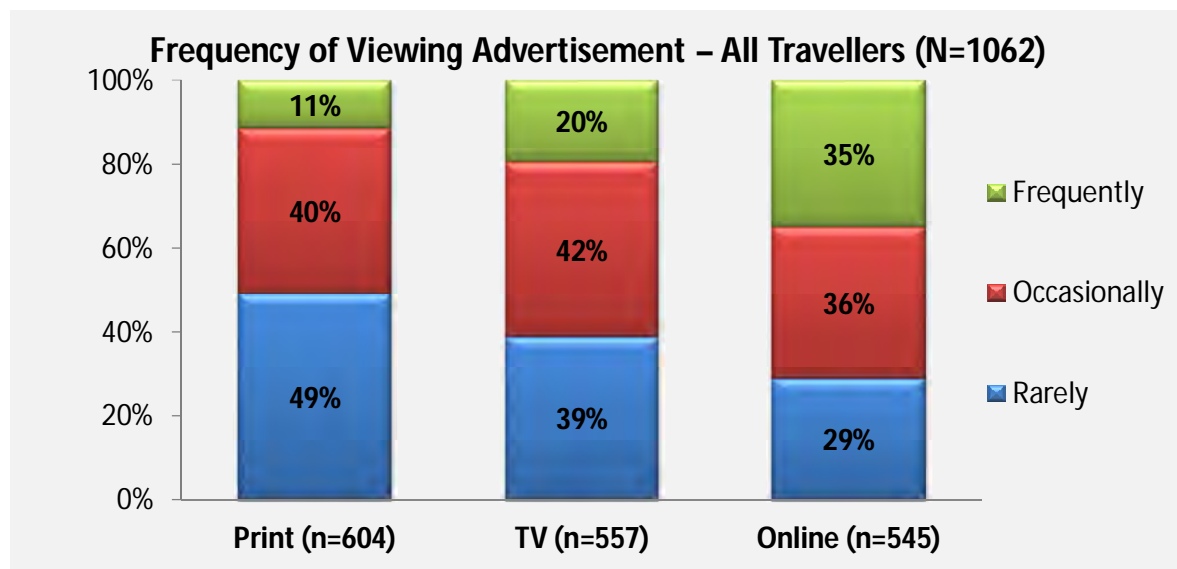
Viewing Medium vs. Ad Showcasing - All Travellers (N=1062)

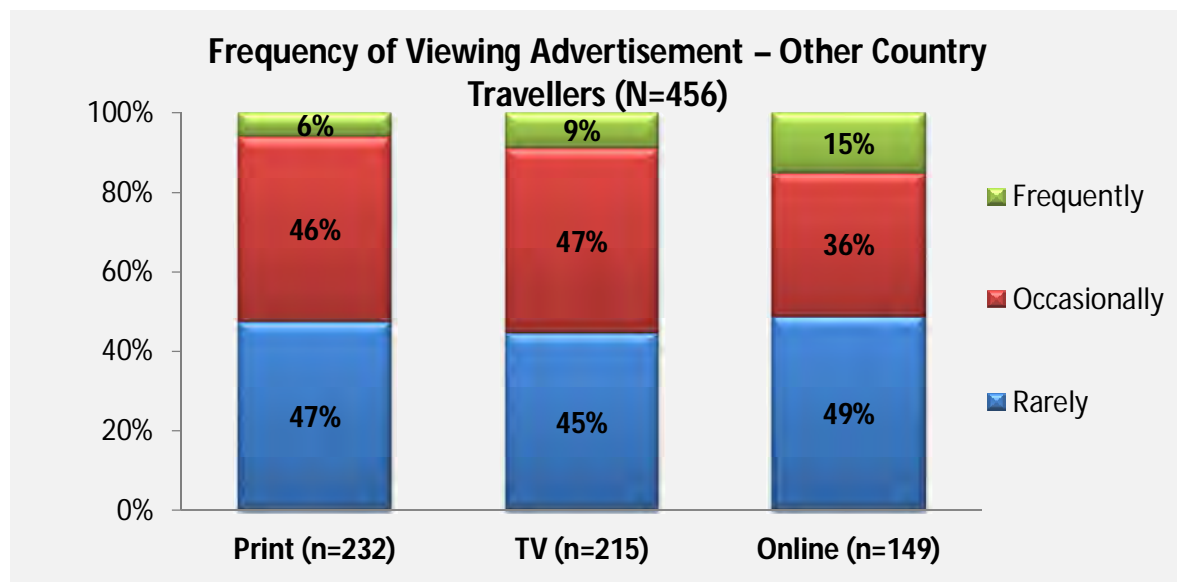
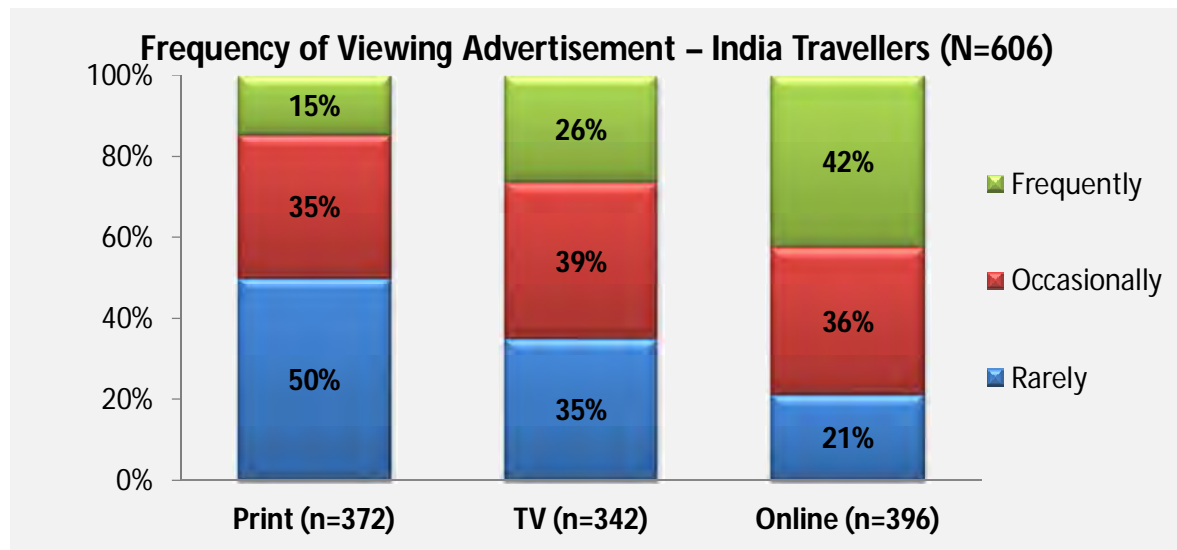


	India						Other					
	Print		Electronic		Online		Print		Electronic		Online	
	n	%	n	%	n	%	n	%	n	%	n	%
Heritage & Culture	416	28%	216	16%	330	19%	70	10%	136	19%	113	23%
Hill Stations & Mountains	28	2%	192	14%	134	8%	29	4%	94	13%	45	9%
Religious Places	29	2%	94	7%	122	7%	69	10%	21	3%	74	15%
Wildlife/Adventure Sports	386	26%	98	7%	252	14%	106	15%	6	1%	74	15%
Cuisine, Fairs & Festivals	12	1%	196	15%	240	14%	47	7%	88	12%	57	12%
Medical Tourism/Yoga/Spiritualism/Meditation	18	1%	28	2%	20	1%	25	4%	24	3%	26	5%
Beaches & Seas	25	2%	144	11%	64	4%	29	4%	140	19%	68	14%
Don't Know	580	39%	382	28%	584	33%	320	46%	218	30%	26	5%
Total	1494	100%	1350	100%	1746	100%	695	100%	727	100%	483	100%

2.1.3.8 Frequency of Viewing Advertisement

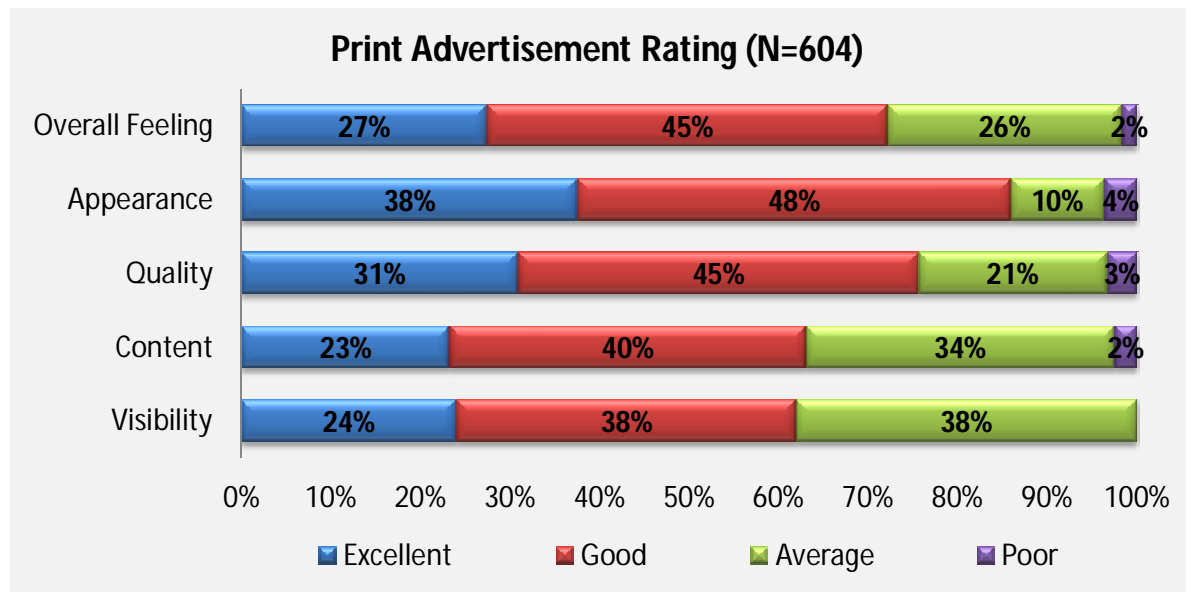
In the online media, the advertisements were the most frequently viewed (35%). In the print media and in television, the advertisements were more occasionally viewed than frequently. 49% of the respondents who viewed the advertisements in the print media said that they sighted the advertisements rarely and 42% of the respondents who viewed the advertisements in the television, mentioned that they sighted the advertisements occasionally. The advertisements were viewed least frequently in the print media (11%). Past travellers to India conveyed that the advertisements were more frequent in all the three mediums. Past travellers to other countries sighted the advertisements rarely in print and online media and occasionally on television. Overall, almost majority of travellers reported sighting the advertisements rarely in the print media.





2.1.3.9 Opinion on the Advertisements in the Print Media

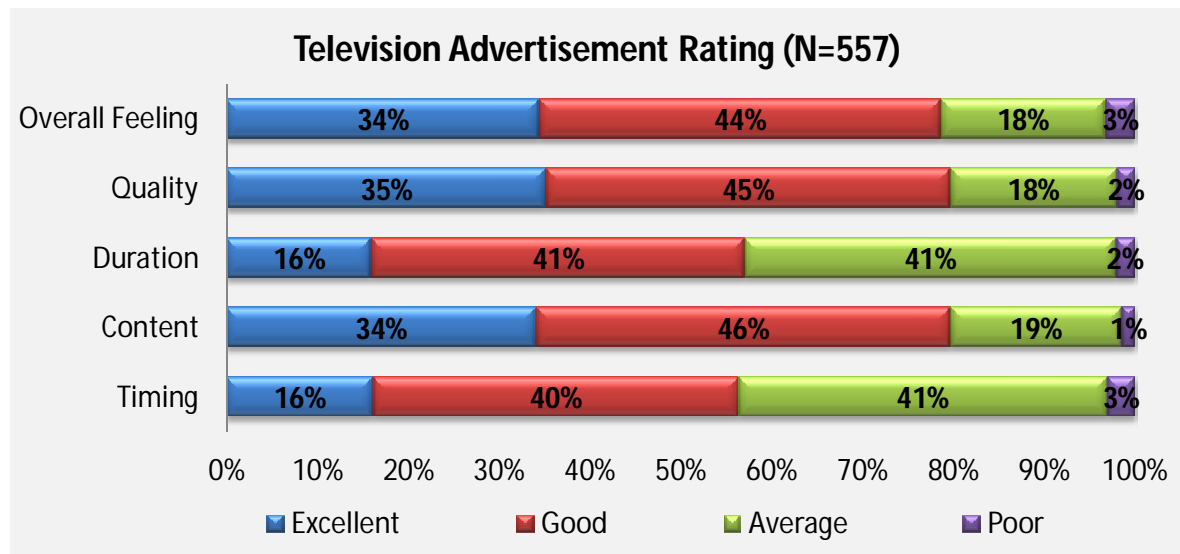
In the print media, all the aspects of the print advertisements were rated as good. 38% of the total respondents rated the visibility of the print advertisements as average. The past travellers to India conveyed that the print advertisements were good in all the respects. The past travellers to other countries mentioned that in content, the print advertisements were average but in all the other aspects the print advertisements were good.



	Print Media - Percentage- India					Print Media - Percentage - Other				
	Excellent	Good	Average	Poor	Total	Excellent	Good	Average	Poor	Total
Visibility	25%	37%	39%	0%	100%	23%	40%	37%	1%	100%
Content	17%	47%	33%	3%	100%	34%	28%	36%	1%	100%
Quality	25%	41%	30%	5%	100%	41%	51%	7%	1%	100%
Appearance	34%	49%	12%	5%	100%	44%	47%	7%	2%	100%
Overall Feeling	23%	41%	34%	2%	100%	34%	51%	13%	2%	100%
Total	25%	43%	30%	3%	100%	35%	43%	20%	1%	100%

2.1.3.10 Opinion on the Advertisements in the Television

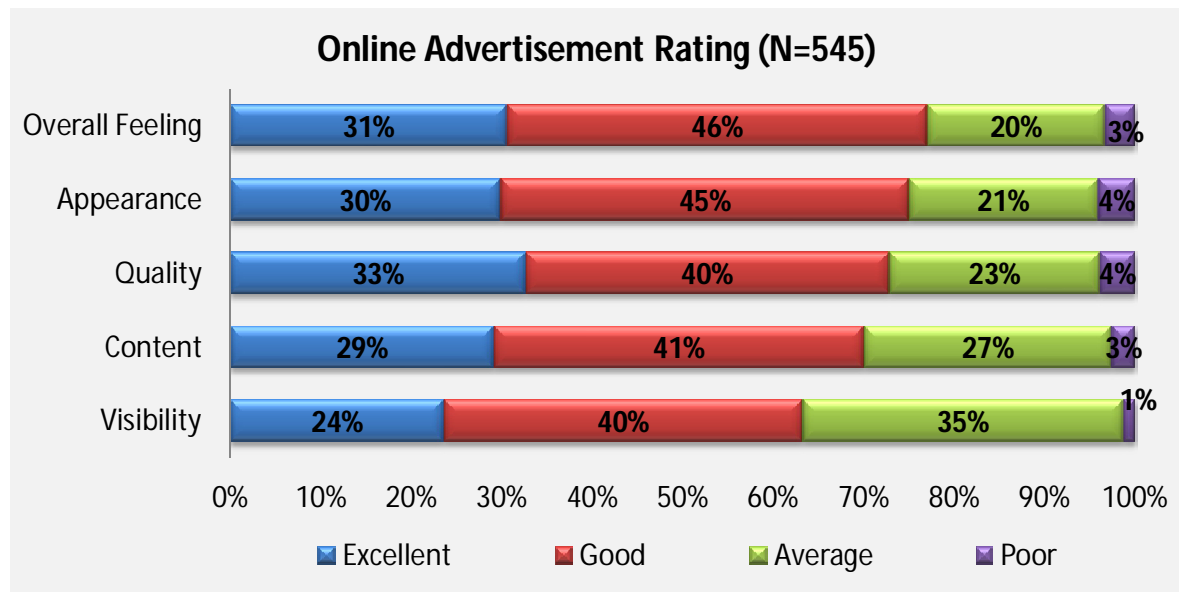
In the television, all the aspects of the advertisements apart from timing were rated as good. 41% of the total respondents mentioned that the timing of the advertisement in television was average. Past travellers to other countries found the timing and duration of the television advertisement as average. Past travellers to India found the television advertisement good in all aspects.



	Television Media - Percentage - India					Television Media - Percentage - Other				
	Excellent	Good	Average	Poor	Total	Excellent	Good	Average	Poor	Total
Timing	17%	55%	26%	2%	100%	15%	17%	63%	5%	100%
Content	30%	40%	29%	2%	100%	41%	55%	3%	1%	100%
Duration	13%	51%	34%	2%	100%	21%	25%	52%	3%	100%
Quality	30%	43%	27%	0%	100%	43%	47%	5%	5%	100%
Overall Feeling	34%	43%	18%	5%	100%	35%	47%	18%	0%	100%
Total	25%	46%	27%	2%	100%	31%	38%	28%	3%	100%

2.1.3.11 Opinion on the Advertisements in the Online Media

In the online media, all the aspects of the advertisements were rated as good. Past travellers to India too found the online advertisements good in all the aspects. 73% of the past travellers to other countries found the online advertisements average in visibility, while they found the advertisements good in all the other aspects.



	Online Media - Percentage - India					Online Media - Percentage - Other				
	Excellent	Good	Average	Poor	Total	Excellent	Good	Average	Poor	Total
Visibility	29%	50%	21%	0%	100%	10%	12%	73%	5%	100%
Content	28%	38%	31%	3%	100%	33%	49%	17%	1%	100%
Quality	31%	39%	26%	5%	100%	38%	44%	17%	2%	100%
Appearance	29%	46%	21%	5%	100%	33%	43%	21%	3%	100%
Overall Feeling	33%	43%	21%	3%	100%	23%	56%	17%	4%	100%
Total	30%	43%	24%	3%	100%	27%	41%	29%	3%	100%

2.1.3.12 Most Striking Aspects of the Advertisements

The most striking aspect of the advertisements viewed in the print media was the beauty of the destinations (3690 respondents ranked it number 1). The second most striking aspect of the advertisements viewed in the print media was the concept of the advertisement (102 respondents ranked it as number 1). The most striking aspect of the advertisement viewed in the television was again the beauty of the destinations (271 respondents ranked it as number 1), followed by the concept of the advertisement (134 respondents ranked it number 1). Similarly, the most striking aspects of the advertisements viewed in the online media are beauty of the destinations (279 respondents ranked it 1), followed by the concept of the advertisement (92 number 1 rankings).

Overall												
3 MOST Striking things in the AD	Print				Television				Online			
	Rank 1	Rank 2	Rank 3	Total	Rank 1	Rank 2	Rank 3	Total	Rank 1	Rank 2	Rank 3	Total
Frequency of the Ad	50	27	20	97	68	13	11	92	61	31	20	112
Concept of the Ad	102	127	130	359	134	97	92	323	92	122	94	308
Beauty of the destinations	369	117	39	525	271	128	51	450	279	125	46	450
Music in the ad	0	0	0	0	40	171	105	316	39	125	118	282
Emotional attachment	29	144	183	356	36	109	169	314	47	116	169	332
Tagline/caption of the ad	48	188	230	466	8	38	125	171	21	26	96	143
Other	6	1	2	9	0	1	4	5	6	0	2	8

India												
3 MOST Striking things in the AD	Print				Television				Online			
	Rank 1	Rank 2	Rank 3	Total	Rank 1	Rank 2	Rank 3	Total	Rank 1	Rank 2	Rank 3	Total
Frequency of the Ad	36	18	12	66	48	6	6	60	48	24	12	84
Concept of the Ad	66	54	84	204	102	48	42	192	78	72	54	204
Beauty of the destinations	204	84	24	312	132	90	36	258	180	102	36	318
Music in the ad	0	0	0	0	24	102	54	180	24	84	96	204
Emotional attachment	24	108	114	246	30	78	120	228	42	96	132	270
Tagline/caption of the ad	36	108	138	282	6	18	84	108	18	18	66	102
Other	6	0	0	6	6	0	0	6	6	0	0	6

Other												
3 MOST Striking	Print				Television				Online			
	Rank	Rank	Rank	Total	Rank	Rank	Rank	Total	Rank	Rank	Rank	Total

things in the AD	1	2	3		1	2	3		1	2	3	
Frequency of the Ad	14	9	8	31	20	7	5	32	13	7	8	28
Concept of the Ad	36	73	46	155	32	49	50	131	14	50	40	104
Beauty of the destinations	165	33	15	213	139	38	15	192	99	23	10	132
Music in the ad	0	0	0	0	16	69	51	136	15	41	22	78
Emotional attachment	5	36	69	110	6	31	49	86	5	20	37	62
Tagline/ caption of the ad	12	80	92	184	2	20	41	63	3	8	30	41
Other	0	1	2	3	0	1	4	5	0	0	2	2

2.1.3.13 Message Conveyed Through the Advertisements

Culture & Heritage of India (25%), Variety of Food & Festivals (37%) and Hospitality (35%) are the messages that respondents somewhat believed that the advertisements were trying to convey. Respondents neither agreed nor disagreed with the fact that the advertisements was showcasing developed rail & roads (29%) and did not at all agreed that the advertisements was conveying Yoga/ spiritualism (29%).

Overall														
What the Ad is trying to convey	Culture & Heritage		Variety of Foods & Festivals		Hospitality		Developed Rail & Roads		Worth Experiencing		360 Days Destination		Yoga/Spiritualism	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Not at all agree	15	1%	15	1%	22	2%	161	15%	6	1%	21	2%	311	29%
Somewhat disagree	138	13%	149	14%	124	12%	142	13%	117	11%	154	15%	166	16%
Neither agree nor disagree	250	24%	160	15%	234	22%	311	29%	275	26%	203	19%	234	22%
Somewhat	266	25%	392	37%	375	35%	214	20%	276	26%	166	16%	125	12%

agree														
Very Strongly agree	186	18%	135	13%	97	9%	16	2%	105	10%	93	9%	6	1%
Don't Know	207	19%	211	20%	210	20%	218	21%	283	27%	425	40%	220	21%
Total	1062	100%	1062	100%	1062	100%	1062	100%	1062	100%	1062	100%	1062	100%

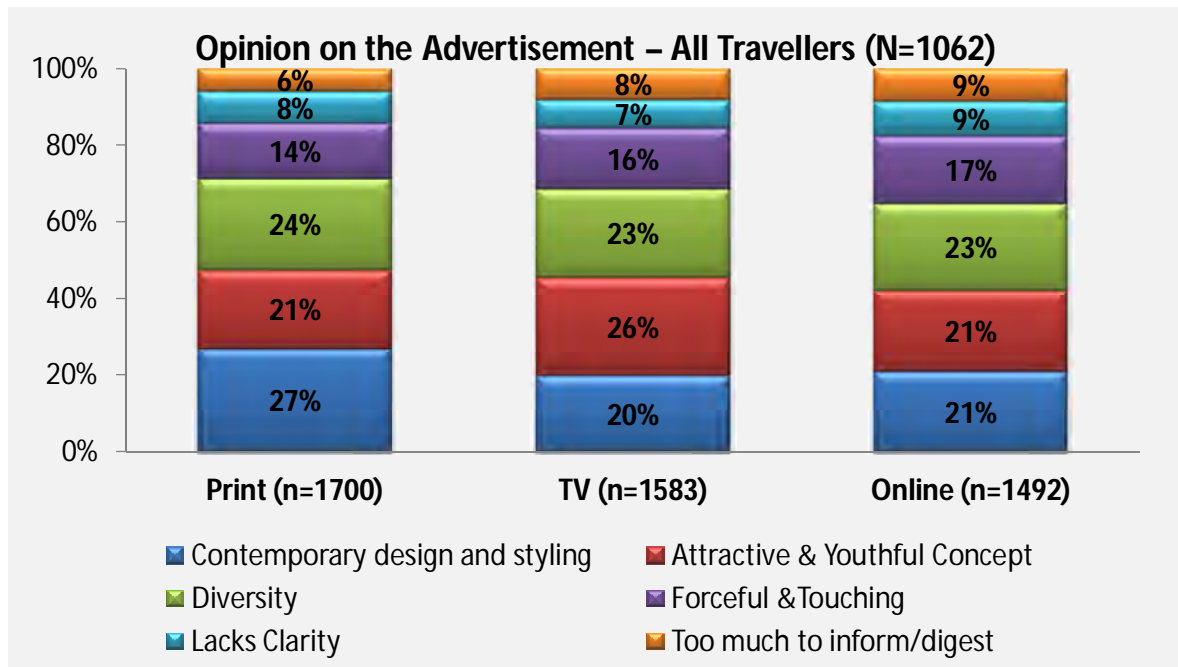
India														
What the Ad is trying to convey	Culture & Heritage		Variety of Foods & Festivals		Hospitality		Developed Rail & Roads		Worth Experiencing		360 Days Destination		Yoga/Spiritualism	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Not at all agree	6	1%	7	1%	9	1%	90	15%	1	0%	10	2%	210	35%
Somewhat disagree	24	4%	94	16%	66	11%	70	12%	46	8%	84	14%	106	17%
Neither agree nor disagree	130	21%	102	17%	90	15%	174	29%	144	24%	100	17%	118	19%
Somewhat agree	126	21%	210	35%	256	42%	120	20%	159	26%	114	19%	44	7%
Very Strongly agree	120	20%	90	15%	82	14%	10	2%	46	8%	62	10%	2	0%
Don't Know	200	33%	103	17%	103	17%	142	23%	210	35%	236	39%	126	21%
Total	606	100%	606	100%	606	100%	606	100%	606	100%	606	100%	606	100%

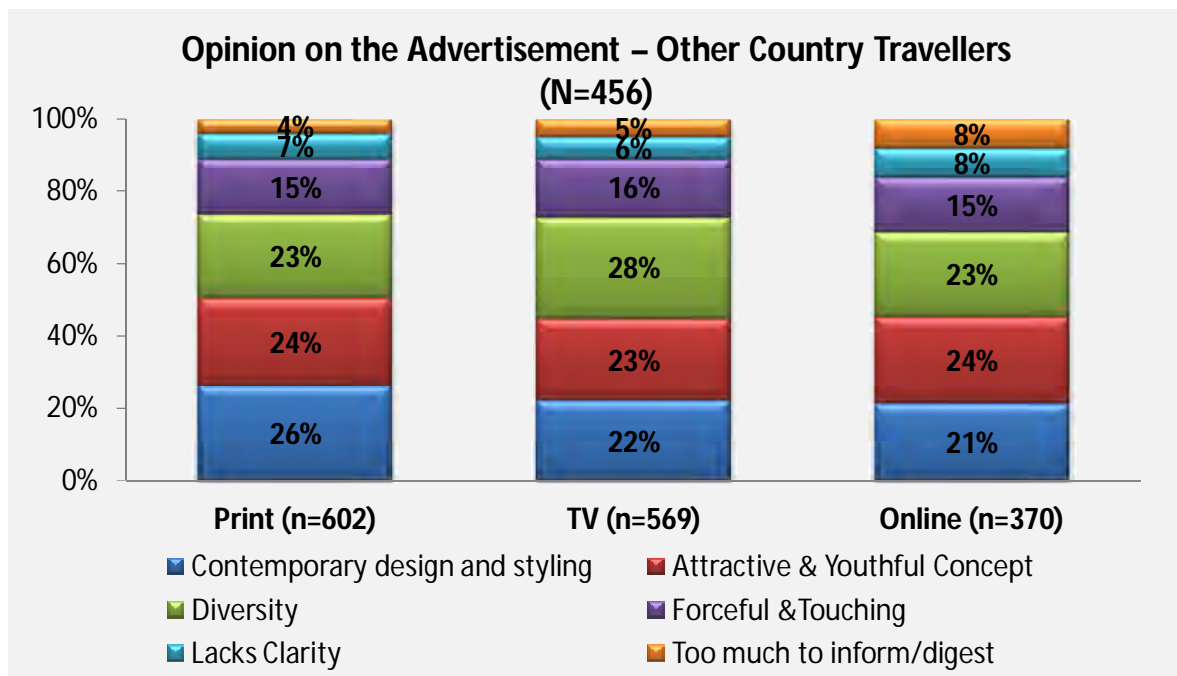
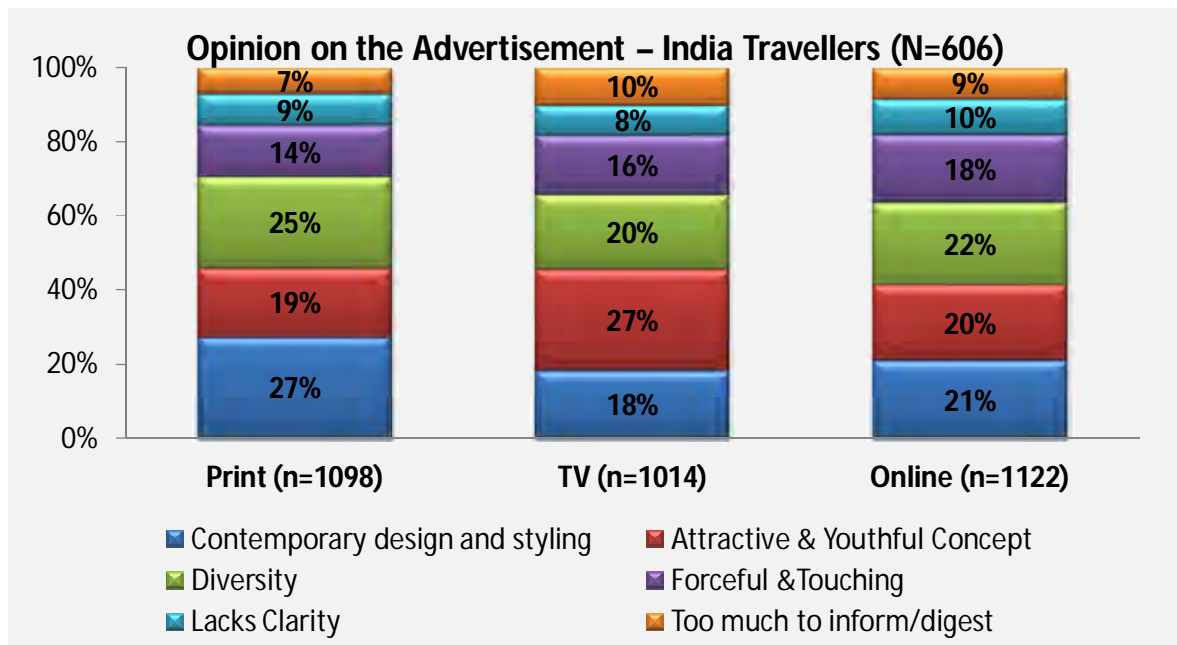
Other														
What the Ad is trying to convey	Culture & Heritage		Variety of Foods & Festivals		Hospitality		Developed Rail & Roads		Worth Experiencing		360 Days Destination		Yoga/Spiritualism	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Not at all agree	9	2%	8	2%	13	3%	71	16%	5	1%	11	2%	101	22%
Somewhat disagree	114	25%	55	12%	58	13%	72	16%	71	16%	70	15%	60	13%
Neither agree nor disagree	120	26%	58	13%	144	32%	137	30%	131	29%	103	23%	116	25%
Somewhat agree	140	31%	182	40%	119	26%	94	21%	117	26%	52	11%	81	18%
Very Strongly agree	66	14%	45	10%	15	3%	6	1%	59	13%	31	7%	4	1%
Don't	7	2%	108	24%	107	23%	76	17%	73	16%	189	41%	94	21%

Know														
Total	456	100%	456	100%	456	100%	456	100%	456	100%	456	100%	456	100%

2.1.3.14 Opinion on the Advertisements

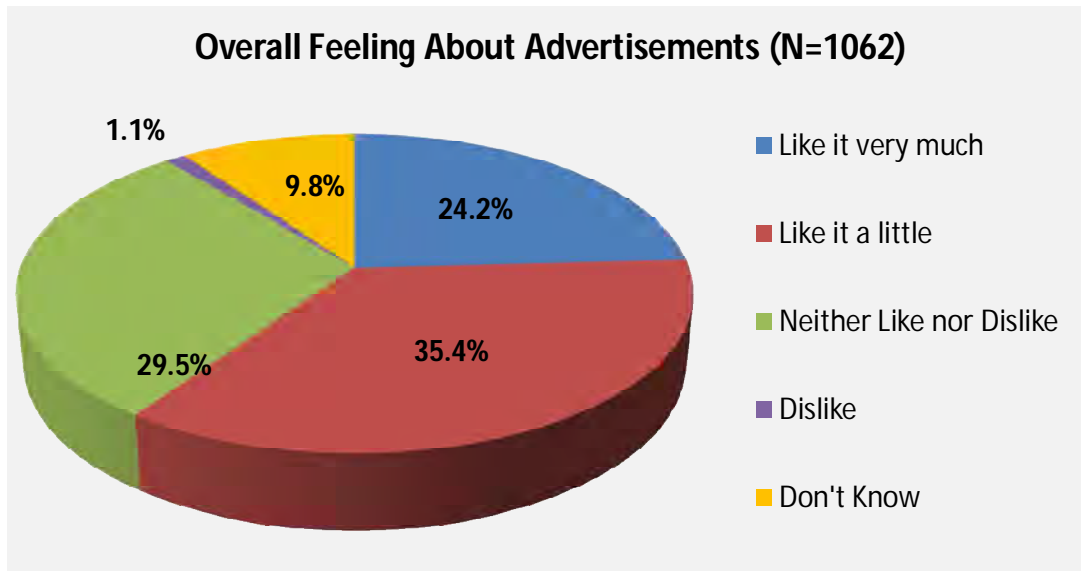
The respondents who viewed the advertisements, irrespective of the medium they viewed it in and irrespective of their past travel countries, felt that the advertisements had contemporary design & styling, had an attractive & youthful concept, presented the diversity of India and was forceful and touching.





2.1.3.15 Overall Feeling about the Advertisements

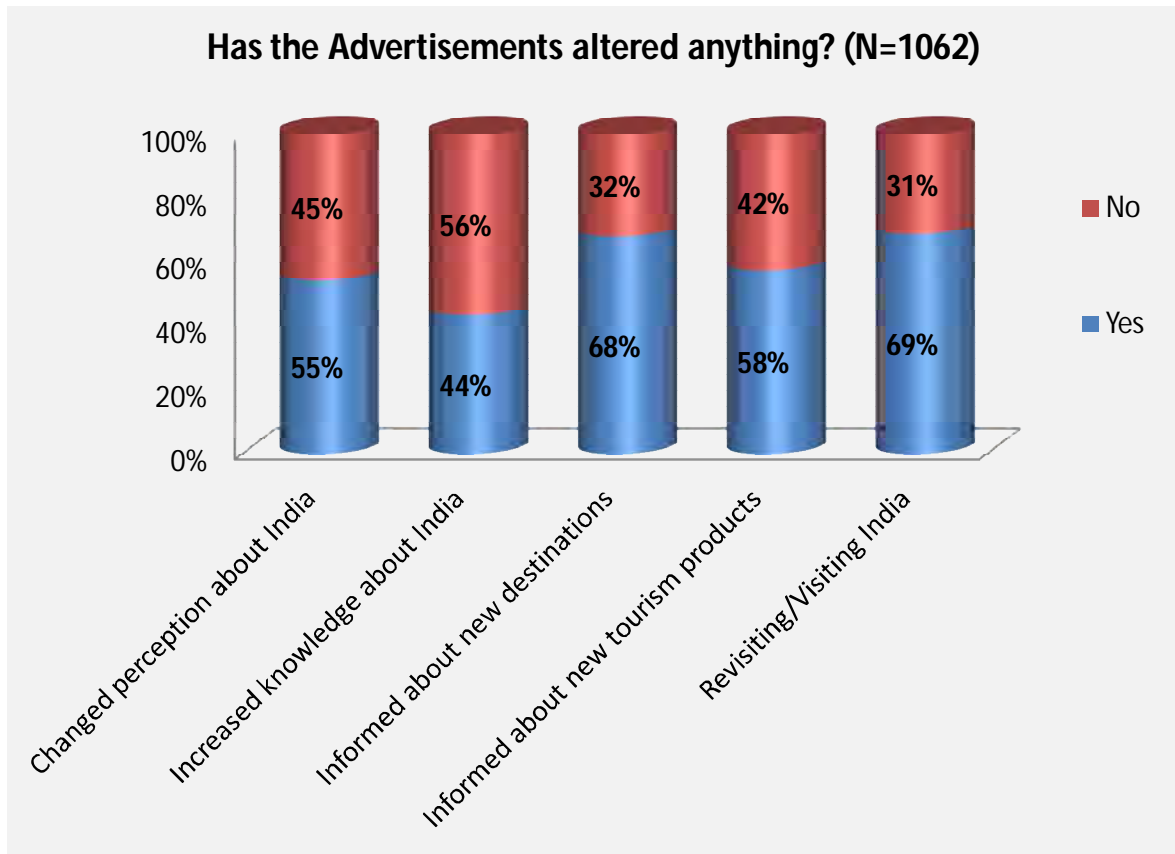
24.2% of the total 1062 respondents mentioned that they liked the campaign very much, while 35.4% of the total respondents liked it a bit. Past travellers to India liked the advertisements a lot more than the past travellers to other countries.



Which of these statements best describe your overall feeling about this Advertisements of 'Incredible India'?	India		Other	
	n	%	n	%
Like it very much	156	25.7%	101	22.1%
Like it a little	254	41.9%	122	26.8%
Neither Like nor Dislike	136	22.4%	177	38.8%
Dislike	6	1.0%	6	1.3%
Don't Know	54	8.9%	50	11.0%
Total	606	100.0%	456	100.0%

2.1.3.16 Alteration through the Advertisements

Majority of the respondents, both past travellers to India and past travellers to other countries, mentioned that the advertisements has Informed them about new destinations, informed about new tourism products and majority respondents mentioned that the advertisements also has made them think about revisiting / visiting India. More number of the past travellers to other countries mentioned that the advertisements have changed their perception about India, than the past travellers to India did.



Has the Advertisements Changed Anything?	India						Other					
	Yes		No		Total		Yes		No		Total	
Changed perception about India	262	43%	344	57%	606	100%	317	70%	139	30%	456	100%
Increased knowledge about India	296	49%	310	51%	606	100%	167	37%	289	63%	456	100%
Informed about new destinations of India	366	60%	240	40%	606	100%	358	79%	98	21%	456	100%
Informed about new tourism products in India	374	62%	232	38%	606	100%	237	52%	219	48%	456	100%
Revisiting/Visiting India	436	72%	170	28%	606	100%	297	65%	159	35%	456	100%

2.2 Qualitative Traveller Inputs - Australia

- ✚ The travellers in Australia are very aware about India as a tourism destination and consider it exotic. At the same time, they do not find India as a regular destination where they can visit year after year, but as a “once in a lifetime” destination. The reason behind this is summed up by a traveller as “Visiting India is such a hassle. Starting from getting visa till the end of the trip. I don’t know what to expect when I am there. Also the flights to India are very expensive. I will visit some years later”.
- ✚ The average Australian travellers still thinks India as dirty and unhygienic, full of poverty and beggars and touts. They want hassle free holidays and hence are apprehensive about visiting India.
- ✚ The popular image of India that comes to the mind of Australians is the Taj Mahal, the forts and palaces of Jaipur and the Palace on Wheels Luxury train.
- ✚ The popular destinations for Australians are Europe, Malaysia, Thailand, Bali, Vietnam, Singapore, Fiji, New Zealand, Hawaii, etc. They prefer visiting Europe due to the similarity in culture, cuisine, etc. Malaysia, Thailand, Bali, Singapore etc. are preferred as they offer cheap holidays and also connectivity is good to these places along with less expensive flight prices.
- ✚ The advertisements, the travellers felt, had excellent images, but they couldn’t relate to the images with India (apart from Taj Mahal and the tiger). The images according to them are dark, whereas India is colourful like no other place on earth. The tagline of “Incredible India” was the only linking factor between the images and India.
- ✚ The travellers commented that the video is more vibrant, represents India more correctly and was interesting and captivating for them to watch. The only apprehension that the travellers have after watching the video is that, they felt that the video was made for the young generation solo travellers and not for travellers who usually take family vacations.

2.3 Tour Operators / Travel Agent Inputs – Australia

- ☞ The tour operators feel that the brand of “Incredible India” is very strong in Australia, and although the visibility of India is okay, the promotional campaigns need to be stepped up and become more main stream. A “call to action” is required otherwise the advertisement gets lost amidst the other commercials and is also more interactive in that case. The tour operators are also of the opinion that a price point needs to be present in the advertisement as in the current price sensitive times, the price of the destination is more important than the destination itself.
- ☞ The advertisements are inspirational but don’t attract a person to travel to India. There is no person interacting in the images and hence a traveller wouldn’t feel connected to the advertisement. The print images do not say “India”. India is colourful and vibrant but the images do not show that. A tour operator said “the black and white images do not do justice to the beauty of India”.
- ☞ Regarding the video advertisement, a tour operator quipped, “The video captures people’s imaginations”. The video is interesting, interactive and shows everything that is India. The “Incredible India” tagline should be present throughout the video as the first half of the video could be anywhere in Asia. The music of the video is typically Indian and is very catchy. The downside of the video is that it shows a single man travelling in India and seems to be targeting the backpackers. This gives viewers an impression that India is only for young males to travel to. A similar video with a family and with an elderly couple would create the correct impression.
- ☞ The tour operators feel that getting a visa to India is a hassle for the Australians as the visa is not cheap and photo specifications are different than other countries and not mentioned properly. Smoothing of the visa process or introduction of visa on arrival (which is present for New Zealand citizens but not Australian citizens) would increase the traffic from Australia to India considerably.

- ☞ The tour operators also feel that introduction of direct flight connectivity between India and Australia will greatly increase the traffic from Australia to India. But the pricing also needs to be competitive as currently the South Asian destinations are doing well due to low flight prices. A tour operator quips “currently the flight ticket cost to Europe and India is almost the same. The customer then prefers to go to Europe at the same price than India”.
- ☞ The tour operators mention that India is not the first place that Australians want to go for a holiday. The reason is the perception of risk in visiting India. The impression of India in the minds of Australians is still a backward country that poor and populous.
- ☞ The tour operators are of the opinion that education of travel agents about India is essential as the actual selling of destinations is done by the travel agents. The tour operators are of the opinion that India Tourism office in Sydney should undertake regular workshops for travel agents and familiarization trips for agents.
- ☞ Other tourism boards which are very active and successful in Australia, in the eyes of the tour operators are Oman, Abu Dhabi and China. They are frequent with commercials and conduct online workshops and webinars for travel agents. Sometimes a travel agent has to go through an online workshop, undergo an exam to win a familiarization trip to the particular country .Tour operators feel that India Tourism Office in Sydney should also start on the similar lines.

Print Advertisements



- ☞ The tiger in the advertisement clearly takes the mind of the viewer to India, but, the tiger being in black and white is not instantly identifiable and hence the advertisement cannot be associated with India instantly. The tiger is also small and is not in a proper profile to be positively identified as a TIGER. If the “Incredible India” tagline was not present in the advertisement, the image would have looked like that of a tiger in any national park in the world. The website (www.incredibleindia.org) is not legible at all. The small

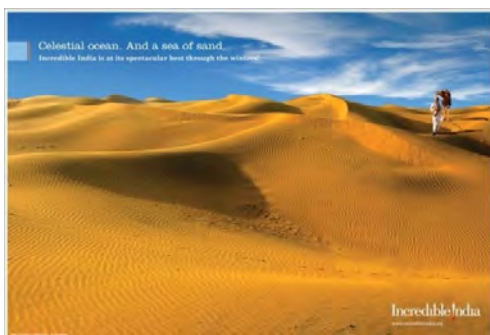
caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.



advertisement for Africa or Canada. The website (www.incredibleindia.org) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals. The wordings "Wild Stag Parties" has a different connotation for Australians and should be looked into properly.



Taj that would attract and interest travellers more. A small portion of viewers felt that the image captured Taj in a "not seen before" angle and was portraying a different angle to see India. The website (www.incredibleindia.org) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.



This advertisement was the most viewed print advertisement in all the countries of USA, France and Australia. The advertisement, at the first instant reminded viewers of the African desert, Morocco, UAE, Dubai, etc, but not India. If the man with the camel was bigger and closer to the eyes, then by his

costume, viewers would have understood it as an India Tourism advertisement. But the costume of the man, when far away, looks like a white robe that Arabs wear. If the “Incredible India” tagline was not present in the advertisement, the image would have looked like that of desert in the Middle East or Africa. The website (www.incredibleindia.org) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.



☞ This advertisement was one of the least viewed print advertisements in the countries of USA, France and Australia. The message that is being conveyed through the advertisement is not understandable by the viewers. The advertisement is drab and not at all representative of India. This hut in an island can be anywhere in the world. If the “Incredible India” tagline was not present in the advertisement, the image would have looked like that of a hut in Laos or any other South Asian country. The website (www.incredibleindia.org) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.



☞ This advertisement is also partially representative of India. Some viewers felt that if the architecture was clearly visible, it would have been identified as India. Although most viewers could identify the image as from India, some conveyed that, if the “Incredible India” tagline was not present in the advertisement, the image would have looked like that of a palace in United Kingdom or Russia. The website (www.incredibleindia.org) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.

Video Advertisement



☞ The video advertisement is more representative of India. It shows the colours, costumes, festivals and experiences that constitute India. This video due to its typical Indian music is interesting and engaging to watch, but this video particularly aims at the young generation of travellers to visit India and is targeting backpackers. The video should feature a young family and / or an elderly couple, and then it will appeal to all

categories of travellers. The tagline of “Incredible India” should be present throughout the video clip as the first 15-20 seconds of the video could be anywhere in Asia and cannot be directly connected to India.

General Feedback on the “Incredible India” Campaign

- Awareness about India is present but not as a regular tourist destination. Australians mostly travel to their neighbouring country New Zealand, United States of America, Thailand, United Kingdom, etc.
- The trade is not at all aware about the new advertisements of the “Incredible India” campaign and has not sighted them in their own country.
- Old advertisements of Taj Mahal (with sari clad ladies offering prayers, with camels in front of the Taj Mahal) are more watched than the current advertorial with Taj Mahal.
- The average Australian travellers still thinks India as dirty and unhygienic, full of poverty and beggars and touts. They want hassle free holidays and hence are apprehensive about visiting India.
- The popular image of India that comes to the mind of Australians is the Taj Mahal, the forts and palaces of Jaipur and the Palace on Wheels Luxury train.
- In the television medium, the India Tourism advertisement was most noticed in channels like National Geographic Channel, Discovery, Travel Channel, etc.

- The newspapers and magazines where the Incredible India advertisements were most viewed are Global Traveller, National Geographic Traveller, Australian Gourmet Traveller, Sunday Magazine, The Weekend Australian Magazine, Travel and Leisure, etc.
- You Tube and Facebook are the most common online mediums, where the Australian nationals saw the Incredible India advertisements.

Promotional Activities by Other Tourism Boards



- All the present medium of promotions is traditional in nature, whereas, other tourism boards have started marketing through various online media like email blasts, webinars, etc. India is lagging behind in that respect.
- To increase travellers to India, travel agents, who are the direct contacts with travellers planning a vacation, need to be educated about India. Workshops and seminars and in some cases familiarization trips would also help travel agents know about India and recommend India to travellers by alleviating their fears. Many other tourism boards are currently conducting regular webinars and online workshops for Tour Operators and Travel Agents and in some cases also incentivizing by offering familiarization trips to the travel agents who participate in workshops and webinars.
- A few of the tourism boards have started collaborating with tour operators to send email blasts to their database of clients in an effort to make their marketing more direct. New modes of marketing should be explored by the India Tourism Offices to interest more travellers to visit India.



- A print advertisement by Egypt (it has a crossword puzzle) - engaging the reader with a "call to action"



- A print advertisement by Thailand - several images and a brief description



- A print advertisement by South Africa -image of destination and a brief description

CHAPTER THREE PHASE -II

3.1 Terms of Reference

The scope of the study as per the Term of Reference is as follows:

Phase II - To assess

- a. Impact of the campaign on the decision of the tourist to travel to India
- b. Whether the campaign has resulted in increase in attractiveness of India as travel destination amongst the respondents?

3.1.1 Methodology

The present study aims to assess the impact of the ad campaigns focusing on the electronic and print Medias. The electronic media further constitutes of television and online internet mediums. Thus, the study has focused on all the three popular formats of

- Print – Newspapers & Magazines
- Visual Media – Television commercials on different channels
- Online – Internet sites & web pages including social networking sites like Facebook, Travel websites, You Tube, Search engines like Google, Yahoo, etc

The research made extensive coverage of all the above mentioned mediums using qualitative and quantitative methods of research in the three target countries.

Research Approach

The second phase of study constituted of two distinct parts of secondary and primary research. The study has also used standard quantitative (SPSS) and qualitative methods for analysis of interviews.

i. Selection of Interviewees:

The target groups for the study were identified on two pre-conditions in the three countries–

- Travelers planning to travel abroad in the coming one year and beyond commencing from August 2012.
- Only those nationals have been identified and interviewed, who have watched the four print ads and one video advertisement that were aired under the Incredible India Campaign (exception has been made in this case for prospective travellers to India who have not viewed any of the advertisements, to find out the motivating factor for them to choose India as a travel destination)
- The interviewee should be a national of the source country. Non-resident Indians (NRI's) or PIO's were not selected

ii. Information Areas:

The second phase has focussed on the following points:

- ❖ Effectiveness of the Campaign
- ❖ Adequacy of the Campaign
- ❖ Impact of the Campaign on the Decision-making of the traveller
- ❖ Perception of the viewer on the different advertisements

3.1.2 Operational Methodology

a. Secondary Research:

The secondary research was carried out by the Nielsen research team based in New Delhi. For this purpose,

- The outbound tourist & travel markets in the respective countries were mapped by exhaustive research on the various mediums used and data bases on travellers in the respective countries.
- Detailed questionnaires were prepared to be used in conducting interviews. The same has been approved by the Ministry officials before launching the field work.
- Interview schedules were also prepared which were to be administered during face-to-face interviews.
- The Phase I of the study had yielded information on the populations and helped the Nielsen research team in identifying nationals planning to travel in the coming one year.

b. Primary Survey:

The data base of travellers for the respective countries was prepared and questionnaires were administered using Computer Aided Telephonic Interviews (CATI) and face-to-face interviews.

- Computer Aided Telephonic Interviews (CATI):

The questionnaires were administered through telephonic interviews, conducted by Nielsen research team. The final database after screening of the respondents was used for the interviews that were conducted by the CATI method. About **90% of interviews were conducted telephonically respectively in each of the three countries of USA, France and Australia**. The ratio of telephonic to face-to-face interviews conducted was the same for all three countries. *Computer Aided Telephonic Interviews (CATI)* is an effective method to reach to the foreign nationals. The respondents in the mentioned locations are more comfortable with providing information telephonically due to their fast lifestyle and lack of time and convenience of not having a visual medium.

- Face to face Interviews:

Besides CATI interviews, face to face In-depth interviews, which was **10% of total sample**, were conducted at important tourist outflow destinations/cities in the three respective countries. Prior to conducting the actual interviews a pilot was administered to cross check the effectiveness of the questionnaire. In the process of conducting the actual interviews, the eligibility of the respondent was first ascertained through a screening process, where the respondents had to share their travel plans in the near future.

3.1.3 Sample Covered

The sample covered in Phase II is as follows:

Country	Category of Respondents	Total
	Future Travellers	
Australia	952	952

The total number of respondents who were contacted for the survey, are as follows:

	AUSTRALIA
Completed Sample / Interviews	952
Targeted Respondents for Achieving Sample	7725
Incidence / Hit Rate	12%

Phase II of the study has been carried out in the month of August 2012, after the advertisements have been run through the period from August 2011 to March 2012. The study aims to assess the impact and the effectiveness of the advertisements in building India's image as a future tourist destination

3.2 Primary Survey Findings - Australia

3.2.1 Distribution and Demography of Travelers

A total of **952 travelers** were interviewed from Australia. 250 (26%) of respondents have decided to visit India in the coming one year and the remaining 702 (74%) respondents have decided to visit countries other than India in the coming one year. The figure below shows the distribution of respondents based on their preference to visit India.

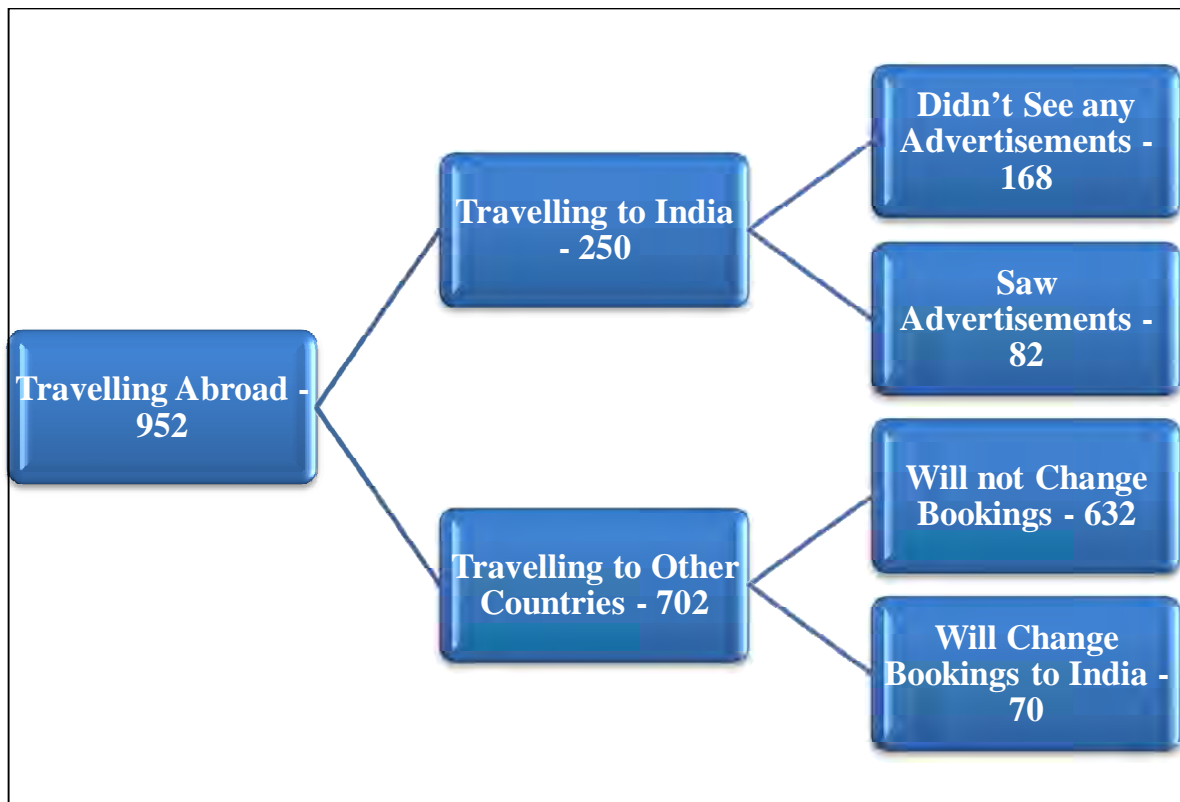


Figure 4.1: Distribution of Respondents

i. Distribution of Travellers by City of Residence

50% of the travellers were interviewed in Melbourne, followed by 49% travellers in Sydney. The rest 1% of travellers belonged to other cities. 79% of the travellers were males and 21% of the travellers were females.

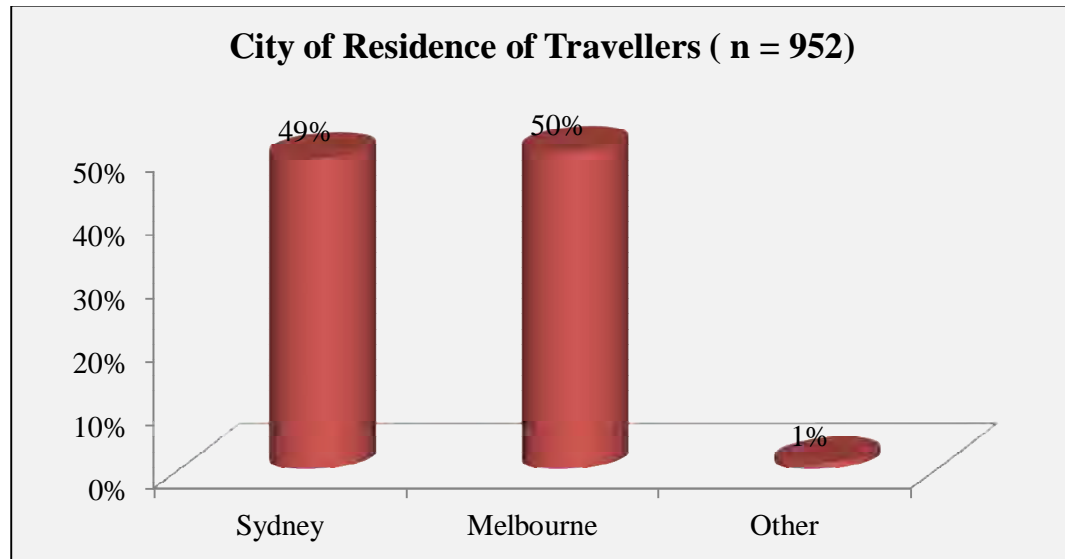


Figure 4.2: City of Residence of Respondents

ii. Age Distribution of Travellers

Majority of travellers belong to the age group above 61 years, 31% of total 952 travellers surveyed in Australia. The next major age group for travellers surveyed was the age group of 36 to 50 years.

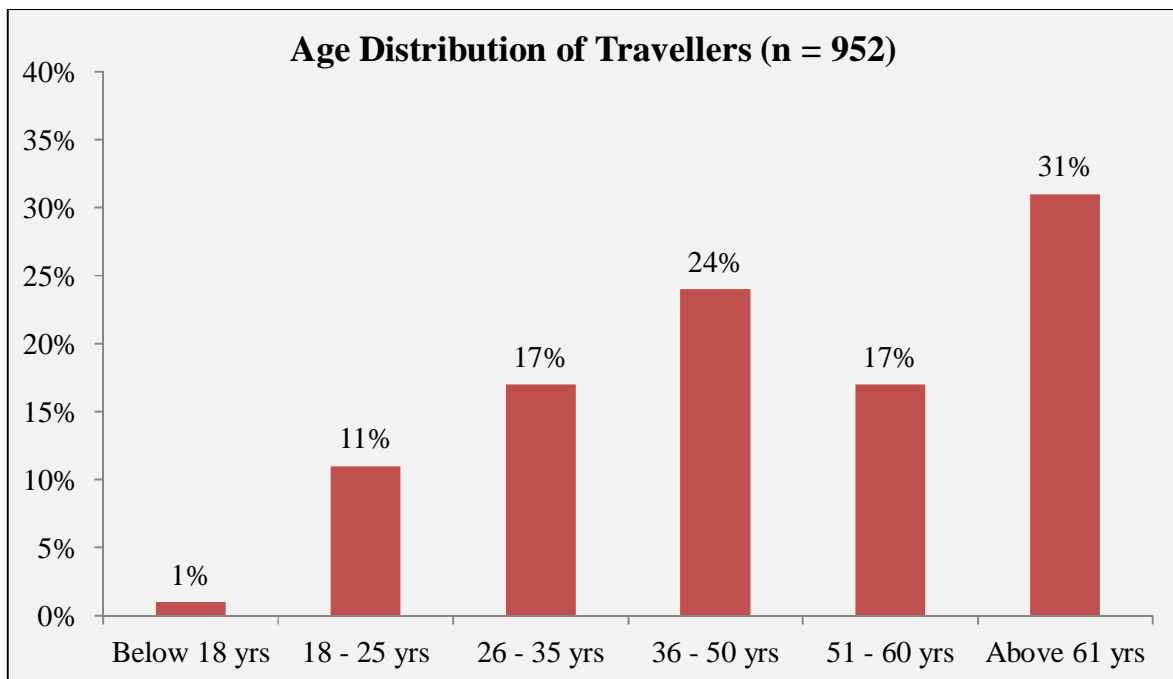


Figure 4.3: Age Distribution of Travelers

iii. Marital Status of Travellers

71% of the total 952 travellers were married and 21% of the total 952 travellers were single. The rest 8% of the travellers are divorced, separated or widowed.

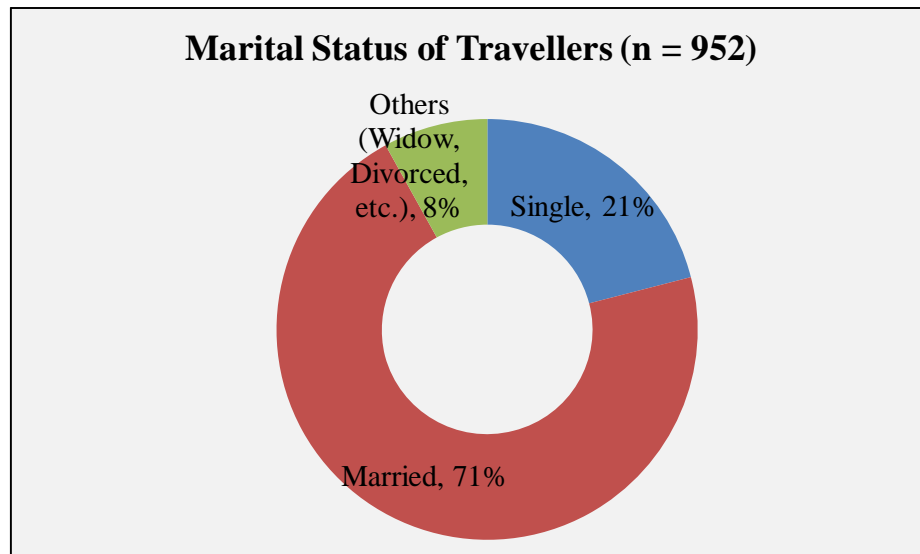


Figure 4.4: Marital Status of Travelers

3.2.2 Advertisement Viewing Particulars

3.2.2.1 *Viewership of Any “Incredible India” Campaign*

65% of the total 952 respondents mentioned that they have seen “Incredible India” campaigns in the past in Australia. 35% mentioned that they have not viewed any of “Incredible India” advertisement campaign in the past. Out of the 4 print advertisements and 1 video advertisement, the most viewed advertisement was the Mysore palace advertisement. The second most viewed advertisement was the Desert (22%) closely followed by the video advertisement (19%). The least viewed advertisement was the print advertisement featuring stags in Corbett National Park (18%).



Figure 3.5: Viewership of Ads by Travellers (n = 784)

3.2.2.2 *Time of Last Viewership of Advertisement Prior to Interview*

The highest number of respondents in Australia said that they had last viewed the advertisements of this campaign more than a month back (28% of 952 travellers). 18% of respondents said they had not watched the advertisements at all but still had already decided to visit India in the coming one year.

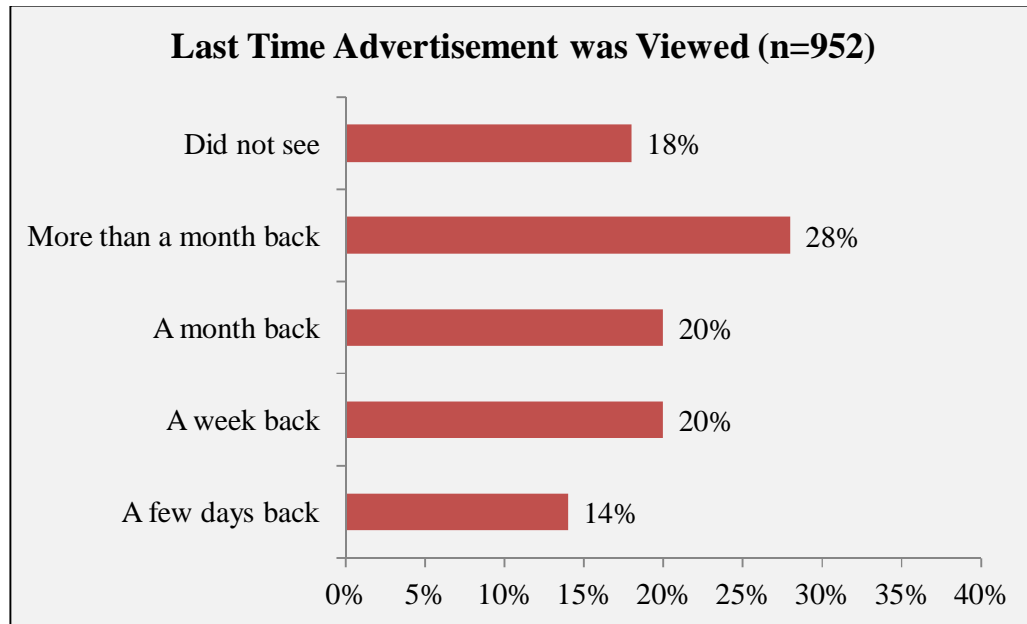


Figure 4.6: Time when Advertisement was Last Viewed

3.2.2.3 Advertisement Viewing Medium

Of the total number of respondents, 29% of the total 784 respondents saw the advertisements in the print media only. 4% respondents watched the advertisements in all the three mediums of print, television and online. 30% of respondents said they watched the advertisements only online and 30% only in television.

Advertisement Viewing Medium – All Travellers (N=784)

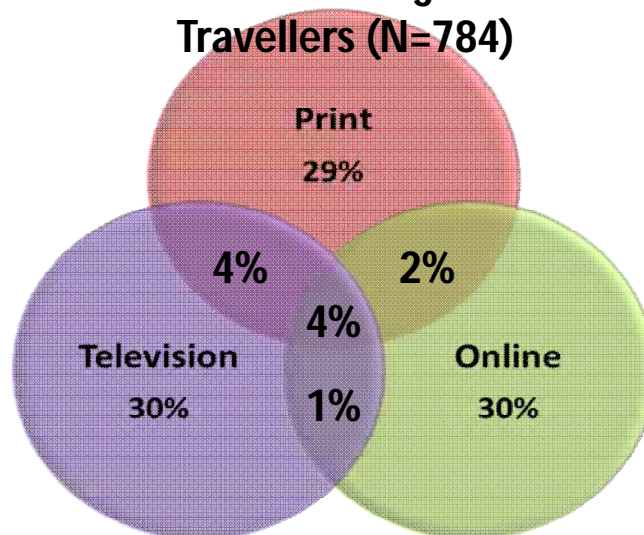


Figure 4.7: Medium of Viewership

3.2.2.4 Most Effective Viewing Medium

The Television only (63% of 952 respondents), followed by print media only (12% of 952 respondents) are considered the most effective mediums of advertisement by the sample of 952 respondents from Australia.

Most Effective Advertisement Medium – All Travellers (N=952)

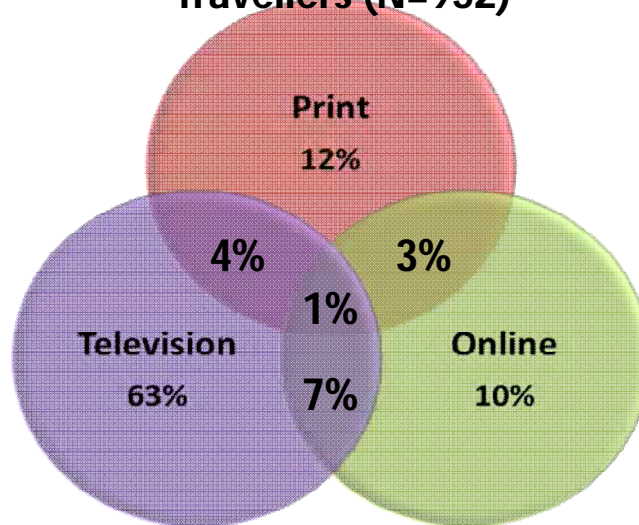


Figure 4.8: Most Effective Viewing Medium

3.2.2.5 Television Channel in which Advertisement was Viewed

In Australia, Discovery (31%, 181 views) followed by National Geographic Channel (25%, 142 views) and BBC (16%, 92 views), were the channels where the video advertisement was most viewed. TLC was least viewed with only 2% (9 views) of total views of the advertisement was reported.

Television Channels	Frequency	Percentage
CNN	67	12
BBC	92	16
National Geographic Channel	142	25
Discovery	181	31
TLC	9	2
Animal Planet	58	10
CNBC	9	2
MTV	17	3
Total	575	100

Source: Nielsen Primary Survey **Table 4.1:** Television Channels airing Ads

3.2.2.6 *Print Media where Advertisement was Viewed*

The Sunday Magazine (27%, 275 views) was the most viewed of print ads as reported by respondents. This was followed by Global Traveller magazine with 20% (206 views) magazine of respondents having watched the ads in it. The least views of print ads were reported from Conference + Meetings World Magazine and Air France In-flight magazine both with zero views.

Print Media	Frequency	Percentage
Harvard Business Review	19	2
International Herald Tribune	75	7
Conference + Meetings World Magazine	9	1
Wall Street Journal Magazine Global	19	2
The Economist	39	4
Financial Times Worldwide special reports	19	2
How To Spend It	9	1
Global Traveler	206	20
Associations & Meeting International	0	0
Reader's Digest	57	6
Australian Gourmet Traveller	120	12
Sunday Magazine	275	27
The Weekend Australian Magazine	122	12
Wish	30	3
Air France In-flight Magazine	0	0
Delta Sky (In-flight Magazine of Delta Airlines)	9	1
Total	1008	100

Source: Nielsen Primary Survey

Table 4.2: Print Media Ads Viewership

3.2.2.7 *Online Media where Advertisement was Viewed*

You Tube (20%, 220 views), followed by Yahoo (18%, 198 views) were the websites where the advertisements were most viewed. Eurosports with 4% views (38 views) was the website where the ads were least viewed.

Online Media	Frequency	Percentage
BBC.com	171	16
Eurosports.com	38	4
CNBC.com	56	5
LinkedIn	9	1
Facebook	185	17
CondeNast Traveler	58	5

Trip Advisor	140	13
Yahoo	198	18
You Tube	220	20
Total	1075	100

Source: Nielsen Primary Survey

Table 4.3: Online Ads Viewership

3.2.2.8 Impact of Advertisements on Decision Making of Travellers

Those who viewed the advertisements in the print medium mentioned that they have made a decision to consider India in their future travels plans after viewing the advertisement (29% of 708 respondents). Those respondents, who watched the advertisements in television, mentioned that they too have made a decision to consider India in their future travel plans (33% of 434 respondents). Out of the respondents who viewed the advertisements in the online medium, 30% of 784 respondents mentioned that will be considering visiting India in the future after seeing the advertisements.

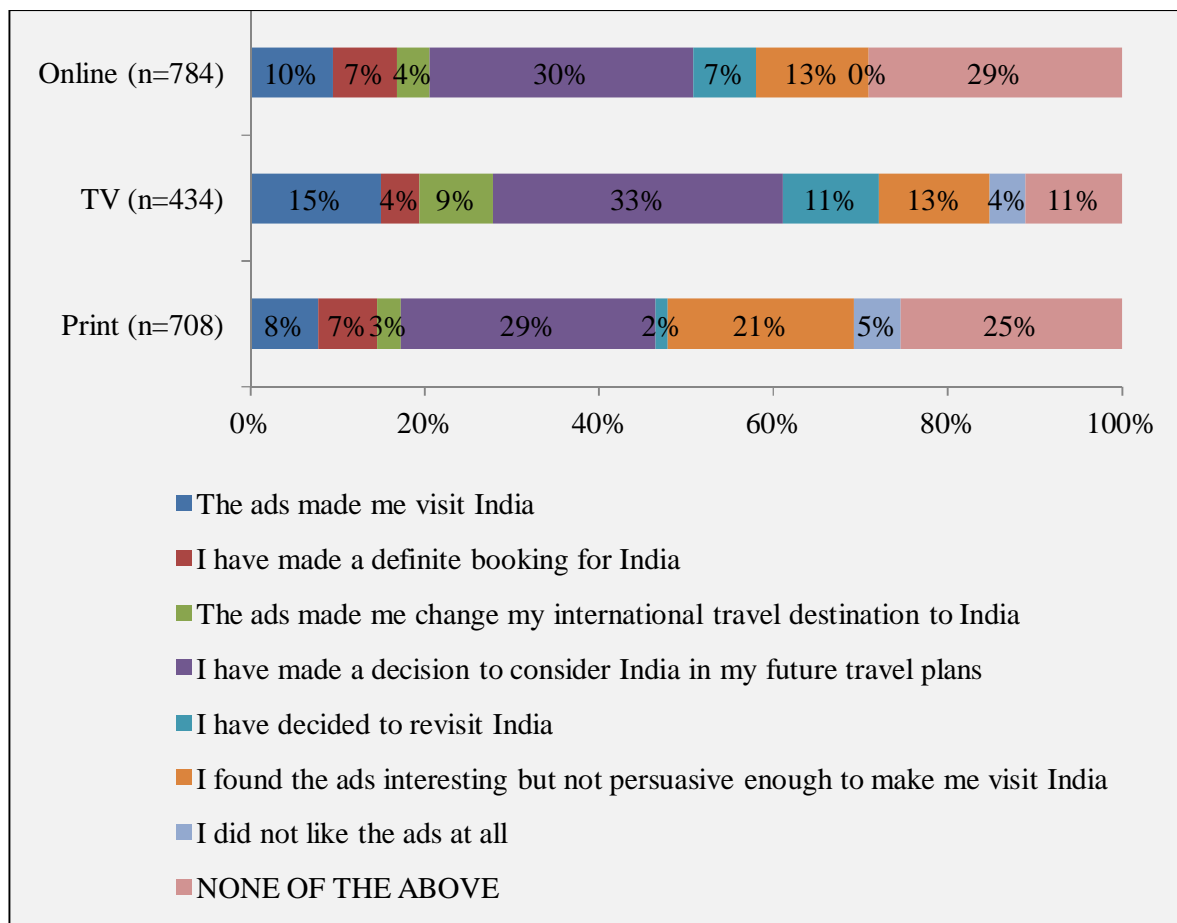


Figure 4.9: Impact of Advertisements on Decision-making of Travellers

i. Impact of Advertisements in Print Media on Travellers Decisions

20% of the total 708 respondents who viewed the advertisements in the print medium are slated to travel to countries other than India in the coming one year and mentioned that the advertisement have made them consider India as a future travel destination.

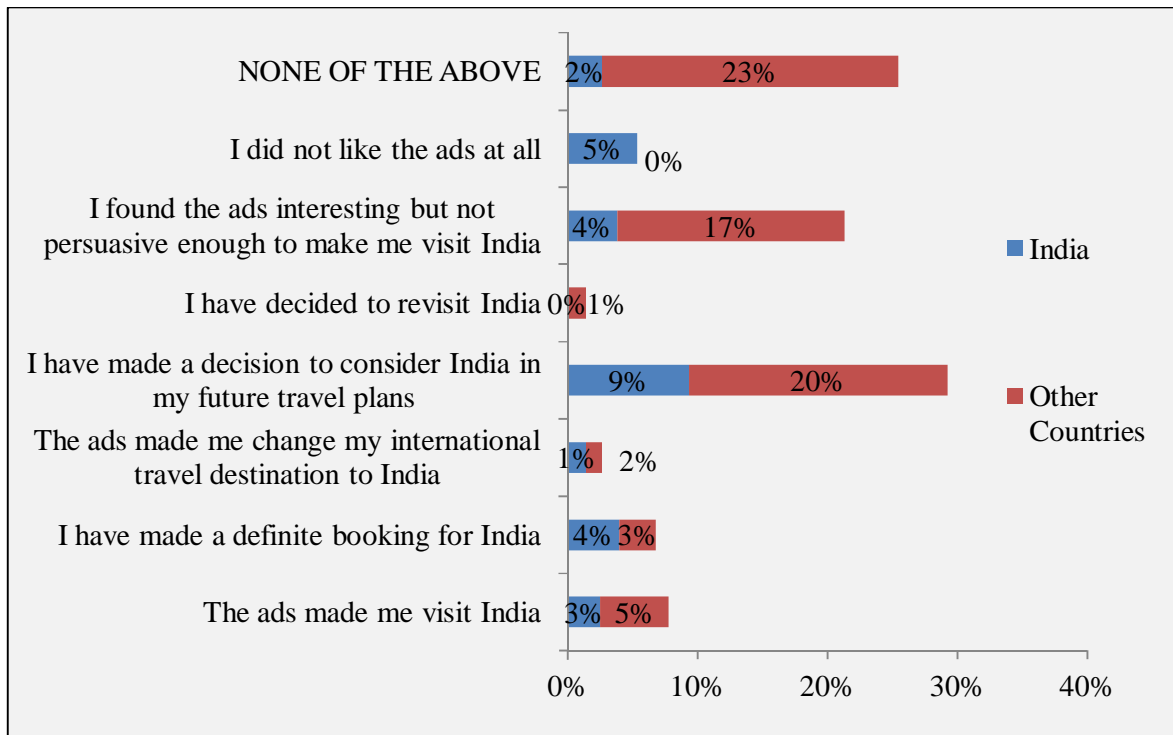


Figure 4.10: Impact of Print Media on Travellers Decisions

ii. Impact of Advertisements on Television on Travellers Decisions

24% of the total 434 respondents who viewed the advertisement on television and are planning to travel to countries other than India in the next 1 year, mentioned that the advertisement has made them consider India as choice amongst future travel destinations.

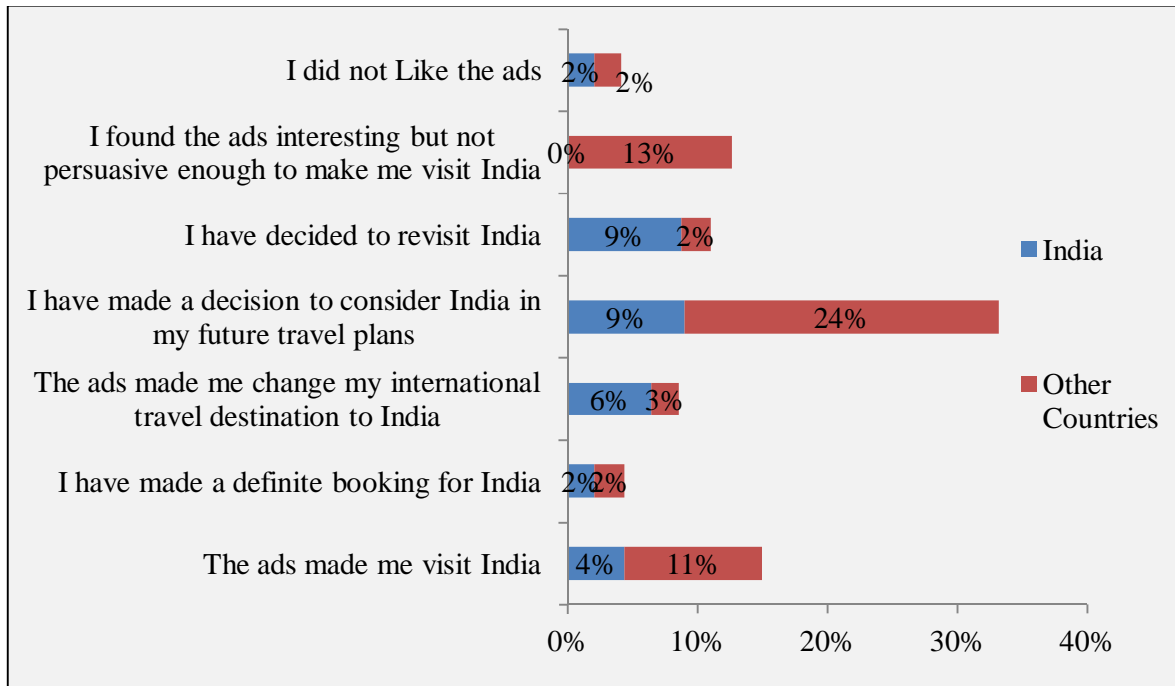


Figure 4.11: Impact of Television on Travellers Decisions

iii. Opinion on the Advertisements in the Online Media

None of the respondent mentioned that they didn't like any of the advertisements and 11% of the total 784 respondents who would be travelling to other countries in the next 1 year, mentioned that they found the advertisements interesting but not persuasive enough to make them visit India.

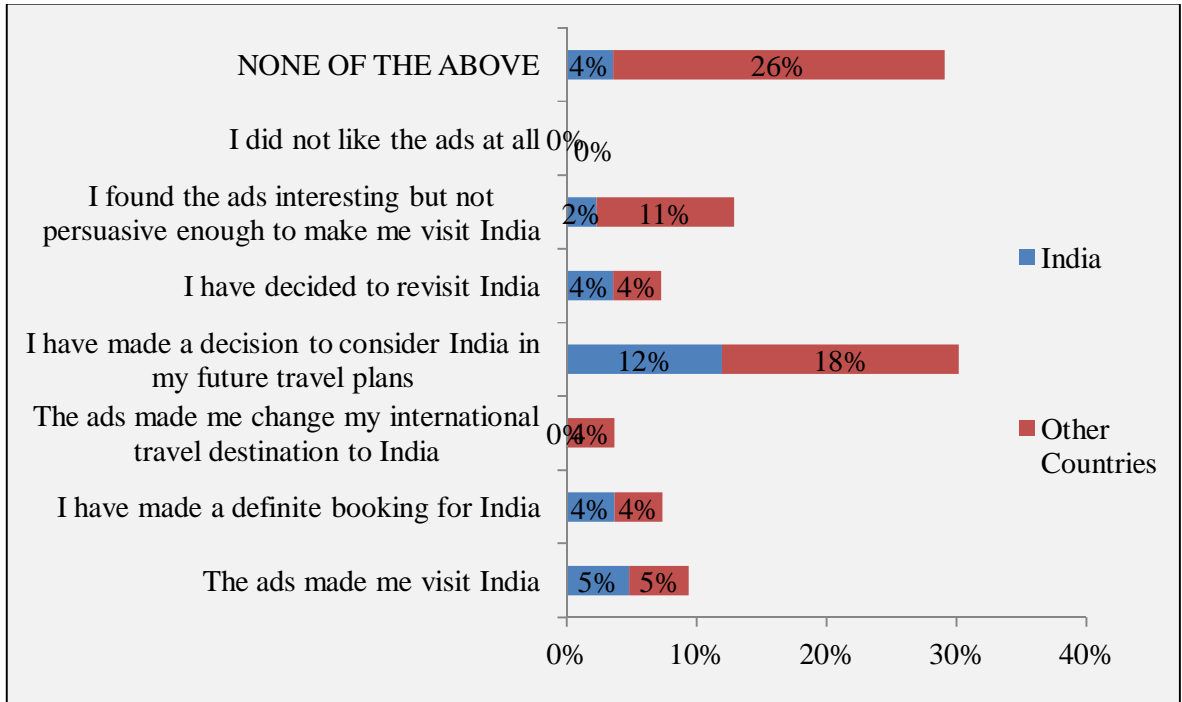


Figure 4.12: Impact of Online Media on Travellers Decisions

3.2.3 Future Travel Particulars

3.2.3.1 Country of Future Travel

26% of the total 952 respondents mentioned that they have already made definite plans to visit India in the next one year. The rest 74% of the 955 respondents interviewed, mentioned that they are travelling to other countries within the next one year. 8% travelers had decided to visit to India after watching the advertisements.

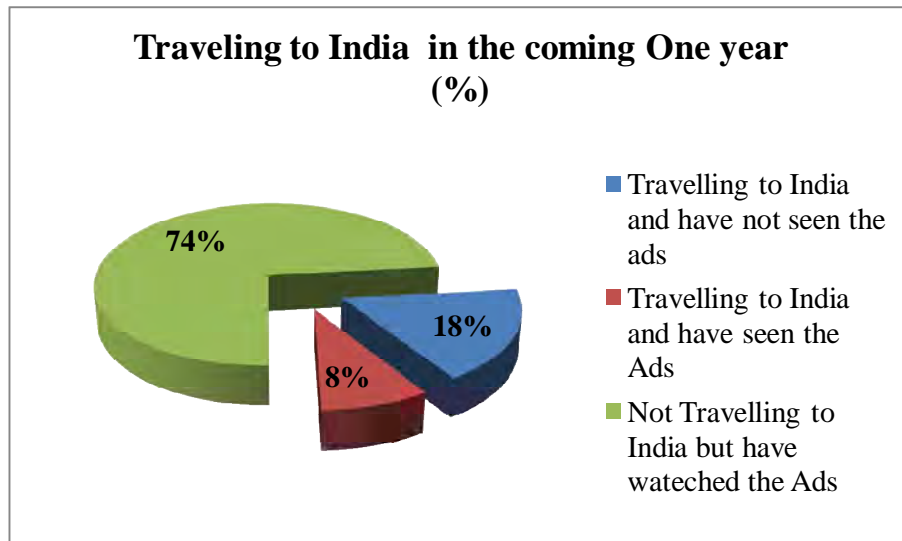


Figure 4.13: Impact of Advertisements

Other Countries of Travel	Frequency	Percentage
Africa	28	2.9
America	29	3.0
Asia	37	3.9
Bali	21	2.2
Cambodia	27	2.8
Canada. Alaska. Vienna. Zurich. London. Berlin.	11	1.2
China then India then Africa	2	0.2
Delhi	46	4.8
Delhi and Mumbai	8	0.8
EUROPE	98	10.3
Europe and Caribbean	17	1.8
Europe, Asia, Australia, America, Canada	13	1.4
Europe South Africa	12	1.3
Fiji, New Zealand, India, Egypt	2	0.2
France and Croatia	12	1.3
France, UK, Ireland	11	1.2
Goa	10	1.1
Greece	9	0.9
Gujarat, Rajasthan, Maharashtra, Jammu & Kashmir	12	1.3
Hong Kong	29	3.0
I am planning to return to southern India	2	0.2
India	68	7.1
India and Thailand	8	0.8
India, Dubai, china	2	0.2
India, Nepal	3	0.3
India, US	1	0.1
India, Singapore, Malaysia	4	0.4
INDIA/ PAKISTAN BORDER	1	0.1
India, Germany & Italy	3	0.3
Japan OR India	2	0.2
Japan, New Zealand, United States, Europe	8	0.8
Kashmir	1	0.1
Kerala and Delhi	8	0.8
Kolkata	9	0.9
Sri Lanka	19	2.0
Mumbai	36	3.8
Nepal	27	2.8

New Delhi, South India	4	0.4
New Zealand	50	5.3
New Zealand this year & Thailand in August 2013	2	0.2
New Zealand. Considering India At Some Stage.	2	0.2
Mt. Everest	1	0.1
Pacific Islands Cruising	14	1.5
Portugal and Morocco	11	1.2
Rajasthan, Delhi, Gujarat	8	0.8
south east Asia, Vietnam and Cambodia	26	2.7
Southern part of India	2	0.2
Sri Lanka or India	3	0.3
Sri Lanka Singapore, Malaysia	21	2.2
Taj Mahal	3	0.3
Thailand	39	4.1
Thailand, Korea, Spain	12	1.3
United Kingdom, Pacific Islands, New Zealand	11	1.2
USA	65	6.8
USA Hawaii Fuji Vanuatu	10	1.1
USA, HongKong	12	1.3
Vietnam or Greece	11	1.2
Vietnam, Cambodia, Chile and Italy	9	0.9
Total	952	100

Source: Nielsen Primary Survey

Table 4.4: Future Travel Destinations

3.2.3.2 Reason for Travelling to Other Countries

Of the total respondents (952), 22% said they have friends and relatives at the destinations and hence chose to travel there. The second reason (20.8%) for choosing a destination was that they loved the advertisements of the destination and wanted to travel there.

Reasons	Frequency	Percentage
I saw and loved the advertisements of this destinations	198	20.8
I have friends / relatives there	206	21.6
It is an Office/ business trip	8	.8
The tourism products there is very attractive	156	16.4
The destination fits my budget	183	19.2
Visa is not required	19	2.0
The destination has tourism products suitable for my family	59	6.2
Any other (please specify)	123	12.9
Total	952	100

Source: Nielsen Primary Survey

Table 4.5i: Reasons for Travelling to Other Countries

Other Reasons	Frequency	Percentage
ASIA	10	1.1
Going with a group	9	.9
have been to Goa but not Mumbai	10	1.1
LIKE INDIAN ARMY	9	.9
Not Sure	9	.9
Now it is cheap	10	1.1
RESEARCH	9	.9
safe	10	1.1
safety, health	9	.9
Still to decide	10	1.1
unsure yet	10	1.1
Visit friends	10	1.1
London Olympics make me feel like visiting London	8	0.8
Total	952	100

Source: Nielsen Primary Survey

Table 4.5ii: Other Reasons for Travelling to Other Countries

3.2.3.3 Travelling to India – Without Viewing any of the Advertisements

A total of 168 respondents out of the total 952 respondents interviewed in Australia, had already decided to travel to India, without having seen the chosen set of advertisements being tested. 27% of respondents said they had always wanted to visit India. Secondly 19% of respondents said they have already visited India and loved it when they had visited before, therefore they are revisiting again.

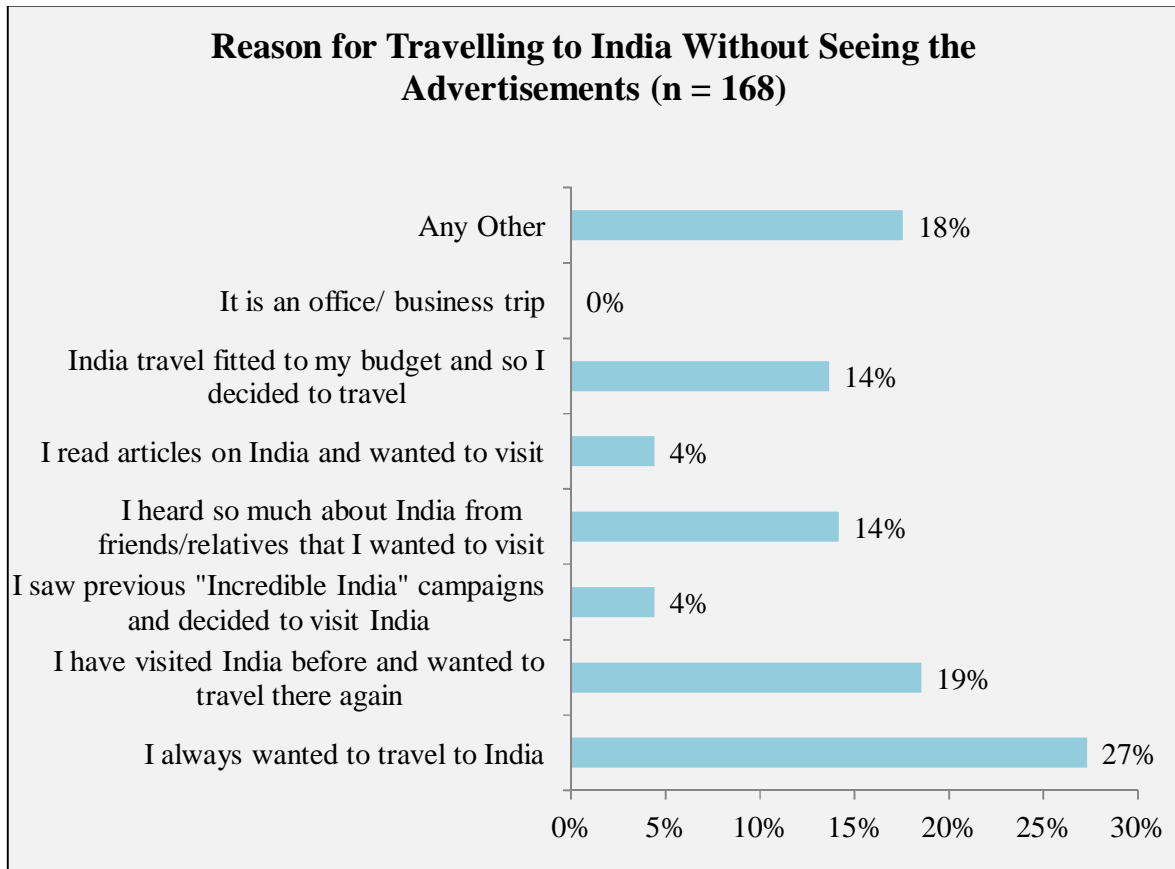


Figure 4.14: Reason for Travelling to India without viewing the ads

3.2.3.4 Travellers to Other Countries

Among the total number of respondents (952), 74% (702) of travellers had made definite bookings to travel to other countries. Only 10% of respondents among 702 respondents said they have decided to change their international travel bookings to India after they had watched the advertisements. 90% respondents mentioned that they won't change their current bookings in favour of India.

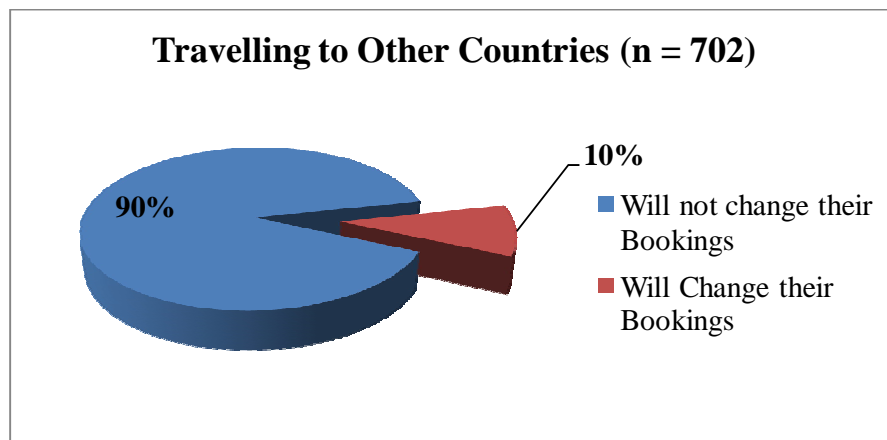


Figure 4.15: Impact on Travellers to Other Countries

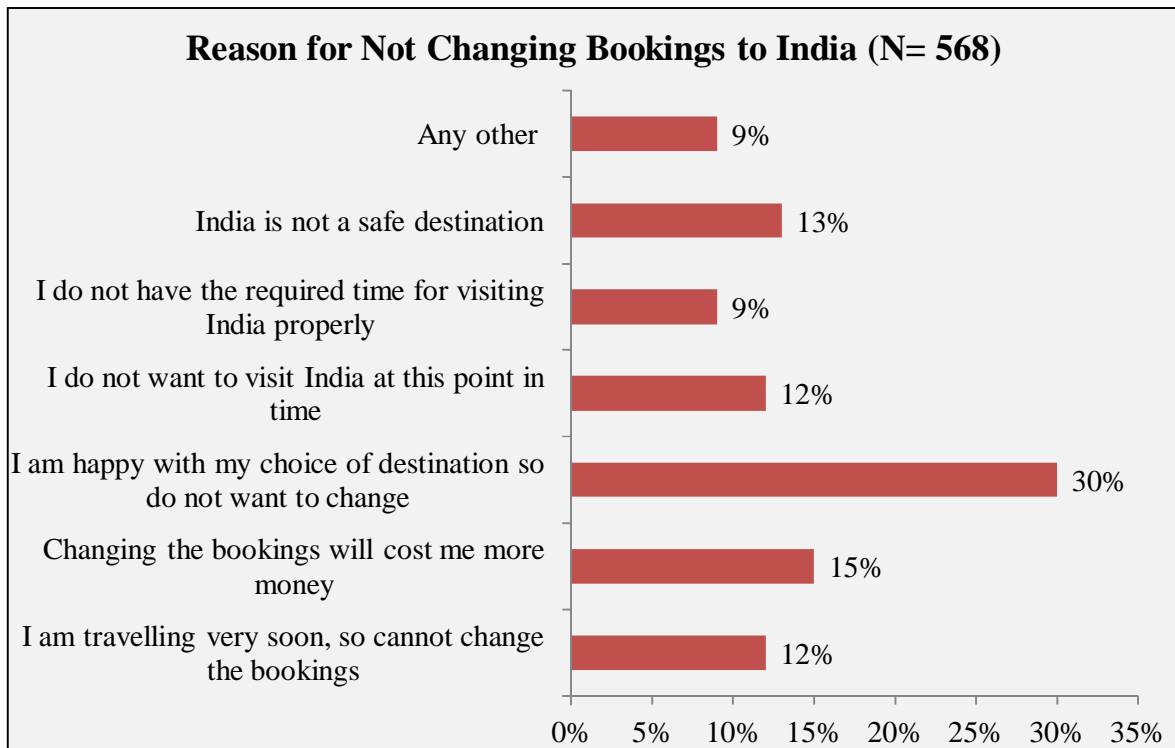


Figure 4.16: Reasons for not changing Travel Bookings to India

30% of travellers said they were happy with the destination they were travelling to and thus do not want to change.

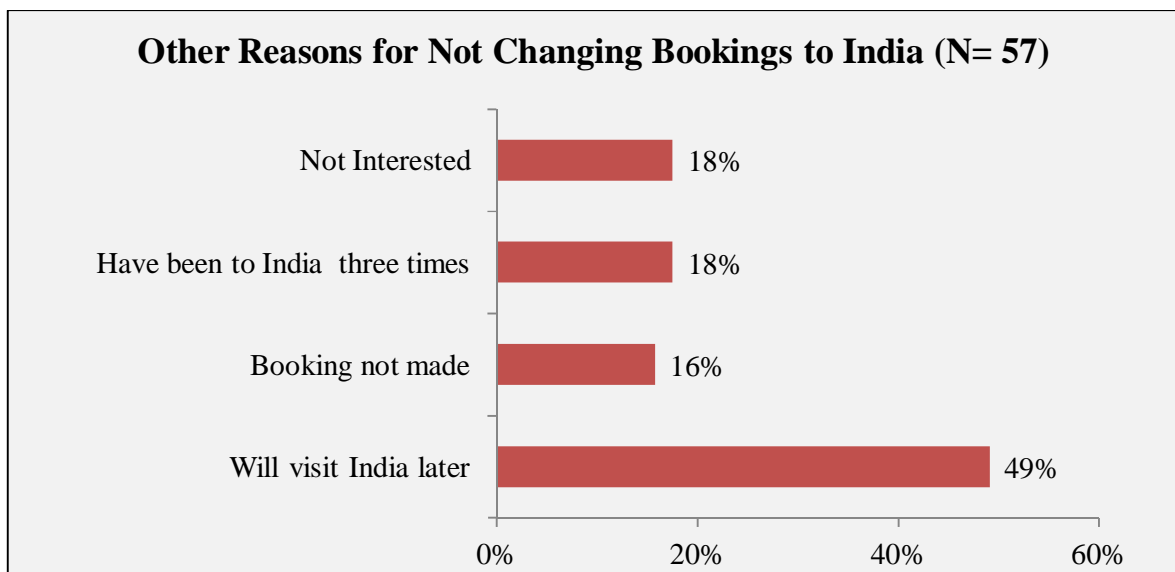


Figure 4.17: Other Reasons for not Changing Travel Bookings

After watching the Incredible India advertisement 80% of travellers said they would consider India in their future travel plans.

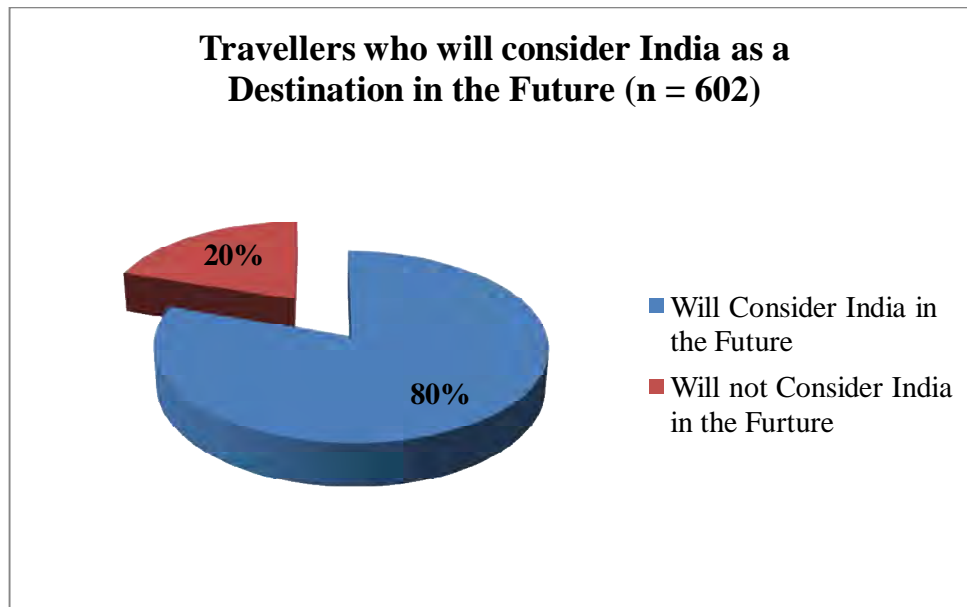


Figure 4.18: Travellers who will consider India in the Future

3.3 Conclusion – Impact of Media Campaigns on Travellers in Australia

There has been a continuous growth in outbound travel from Australia in the past decade. As a positive impact, the Incredible India campaigns have registered in the respondents minds and as some respondents said it has made them think/plan to visit India in the near future or in the coming year. Some of the important features of the survey carried out in Australia are:

- India is considered as a long period leisure/holiday/vacation destination by most Australian respondents interviewed. According to respondents, the constraint in travelling to India is the cost and time they would like to spend for such trips.
- Sydney (49%) and Melbourne (50%) are the main cities of residence and departure for respondent travellers in Australia. About 31% of respondents covered belonged to the age group of above 61 years which indicates a variance in travel and consumption patterns in comparison to France and UK.
- In Australia the most viewed advertisements were the Mysore Palace advertisement (22%) followed by the desert ad (22%). Online and television were the two important mediums of viewership as reported by respondents, while 63% of respondents said television is the most effective medium of communication and advertisement. Electronic medias especially the online media has been highly recommended as a medium the people are convenient with due to their hectic lifestyles during personal interviews.
- Impact of advertisements on respondents:
 - Of all the viewership's in the different mediums 10%, 15% and 8% of respondents said the ads made them visit India in the online (784), television (434) and print

(708) medias respectively. For the same sample the positive impacts of the advertisements can be gauged where 4%, 9% and 3% of respondents have said that they changed their international travel bookings after viewing the advertisements respectively. On the whole, 7% of respondents have said the ads made them change their travel bookings, while 9% of respondents are travelling to India after watching the advertisements out of the total sample of 952 respondents.

- Respondents 30%, 33% and 29% for online (784), television (434) and print (708) have said they will consider India as a future travel destination, after watching the ads. On the whole 80% of respondents have said they will consider India as future travel destination.
- According to respondents, India as a travel destination is very much there in the list, but they travel to other countries/destinations as 21.6% of people cited they have friends and relatives in those countries. Secondly, the advertisements were more appealing to the respondents (21%). In the face to face interviews the common concerns cited were the similarities in cultures with New Zealand, America, etc, while countries like Indonesia, Fiji were closer in geography and have been suggested by friends and relatives for travel to these countries.
- Important concerns expressed by respondents during interviews were the health and hygiene conditions and climate in India. Most respondents were unaware of the varied geography and natural resource wealth of India. Some respondent's even went on to say that they kind of understand Indian culture, since it has been demystified by the presence of the Indian diaspora in Australia.
- India on the other hand is considered as a difficult destination due to lack of information on forms of travel, accommodation, etc. Most of the respondents interviewed personally said they would like to visit India but in the coming years citing various reasons such as expenses in travel, health issues, family, etc.
- According to respondents there is very little information on India in the media which has a neutral position on the same. There is no information other than the campaign and activities undertaken by the India tourism offices. On the other hand, destinations like Fiji, Africa run advertisements on a regular basis.

CHAPTER FOUR CONCLUSION & RECOMMENDATIONS

The Incredible India campaign has generated a positive image of India as a must see and interesting destination. The myths with respect to India in some cases have not been addressed although the ads make an appealing persuasive impact to visit India as reported by respondents in the primary survey. American travellers remain the largest foreign tourist arrivals in India. Europe and Western Europe followed by the Americas remain the important source markets for tourism and travel industry around the world. Of all the three source countries under study, Australia has emerged as a booming outbound market which sustained a growth of 8.2% even during the recession of 2008-09 growing to a high of 13.2% in 2010.

4.1 Recommendations

Recommendations to make higher impact on target groups based on inputs of surveyed respondents:

1. Aggressive round the year marketing and promotion activities should be the focus of the campaign strategy for India in all the three countries. The promotional activities have to be carried out in all the three formats with higher focus on the electronic media's. The survey endorses online media through social networking sites and independent web pages as a powerful and effective tool to reach out to prospective audiences in the future in all the three countries. Television is a powerful medium of expression in America and France, thus television ads should be prominently aired in these countries. Print media is an effective medium for consumers in the age group of 45 and above, thus, the advertisements in this medium should have special focus over this population.
2. The advertisements should be shot and prepared based on the country in which it is to be aired. As observed in the case of the three source countries under study, all of them are three different geographies with distinct cultural habit, etc, the common point being all the three countries are developed and have a high standard of living. But again the perceptions and social, economic and political situations are completely different in all the three countries. Thus, there is a need to run country specific advertisements, which appeals to the general consciousness of the population of the country with which they can identify with.
3. According to respondents, travel bookings in all the three countries are made a minimum of three to six months prior to travel to save costs. The advertisements and campaigns thus, have to be aggressively aired round the year as well as during specific crucial months to influence traveller decisions. For example, respondents prefer travelling during the Christmas in the winters when they have a number of days in hand. Similarly, French prefer travelling during August to September and during Christmas. Australians prefer

travelling during August to December. The ads thus have to be aired aggressively from March to June to influence traveller decisions.

4. 39% of outbound trips in the USA are for leisure/recreation/holiday, while the top leisure activities include visiting historical places, visiting small towns and villages, sightseeing and touring the countryside and visiting cultural heritage. The promotional campaigns should be able to capture the imagination of the tourist by promoting the multi-dimensional and diverse socio-cultural milieu in India. *Exploring and Experiencing India* through *Adventure* could be the themes for promoting lesser known destinations of the North-East, Chhattisgarh, Sikkim, etc. The ads should also focus on the architecture, archaeology and heritage as other themes that respondents said they would be interested to visit in India.
5. The age group of travellers varies from 18 years and beyond. There is a sizeable population of above 61 years travelling to India from the USA (19%), Australia (31%), and France (22%). The needs and purpose and consumption patterns of travellers thus varies with age. Key targets groups should be identified as per needs and ads should be accordingly aired. The advertisements while promoting India as an interesting destination should also convey the appropriateness of India as a travel destination to all age groups.
6. The food and cultural heritage of different parts of India should be promoted to give information on the diversity and richness of Indian culture and heritage.
7. People in countries of France, America and Australia are geographically and culturally separated, distinct and diverse communities in comparison to India. India's image is thus, differently placed in the psyche of people in all the three countries. The most common perception/myths aired by interviewees are India's poverty and concerns for health & hygiene conditions in the country. The media advertisements should thus be prepared keeping these in mind showcasing the infrastructural and economic development taking place in the countries. Documentaries, short films or five to ten minute videos showcasing the same can be aired to meet the expectations of prospective tourists.
8. 51% of American outbound tourists are women. A large chunk of our respondents (48%, USA and 45%, France) being women, safety and security was an oft-repeated theme of discussions during interviews. The ads should also convey a sense of safety and well-being to prospective tourist who could be travelling to India alone or with families.
9. India is not considered as hassle-free destinations as respondents cited less information on modes of travel and accommodation available or conveyed through these ads. There is a need to bridge the gap with specific adequate information on easy to access transport and grades of affordable accommodation suitable to different budgets at various sites being promoted and special features with respect to each of these sites and destinations.
10. On the other hand, India is considered as an extensive leisure destination, where respondents wanted to spend longer periods visiting different regions at a stretch at leisure.

The notion of leisure travel that is being promoted should be thus strengthened to give a positive impression of the various leisure activities available.

11. An important source of information, which influences travellers decisions to travel abroad is word-of-mouth assurances/appreciation and experiences shared by friends and relatives travelling to that particular destination. Respondents from Australia shared their views of Vietnam, Bali, Cambodia which had been conveyed by friends and relatives who had previously visited these destinations. The India tourism offices and the Ministry of Tourism should give higher emphasis to improve the tourist experience and nature of propaganda generated from visits.
12. The primary survey and in-depth interviews in all the three countries have pointed out to information gap about India, other than the campaigns and related activities being carried out by the India Tourism offices. The neutrality of local media and state information boards does not position India as a prime or must see destination. In order to generate greater interest and positive visits to the country, the Ministry of Tourism through its various tourism offices should liaise and lobby with the local media and host nation tourism departments to promote India as a must see destination. The Ministry should also promote and liaise with international tourism bodies such as UNWTO, WTTC, ITB, etc to strengthen India's standing and ranking in the international market.
13. UNWTO highlights 2011 points to localized regional or inter-continental travel in the rise in the world due to recession and changes in geo-political situations in past half decade. The campaigns thus should also be targeted to India's neighbours China and South-East Asia. China has shown incredible growth in inbound as well as outbound (18.5% CAGR for 2000-2010⁴) tourist travel. The campaigns thus, should also target prospective growth markets in addition to traditional source markets of Europe and America.

⁴ China Outbound Tourism, HVS Global Hospitality Services, 2011