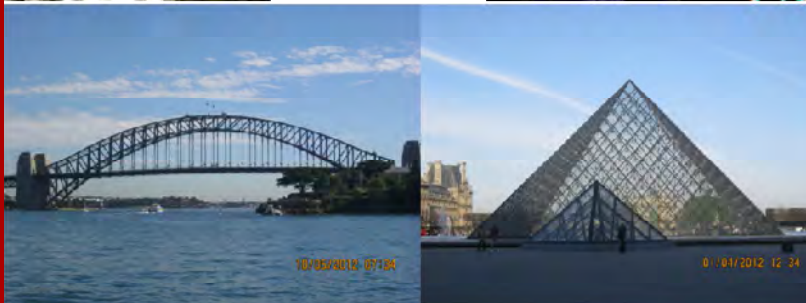


# Assessment of International Media Campaigns of the Ministry of Tourism for France

January 2013

Final Report



Market Research  
Division  
Ministry of Tourism  
Government of India



सत्यमेव जयते  
Government of India

ACNielsen ORG-MARG Private Limited

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Last but not the least we would like to thank our entire team of research professionals as well as our staff in Paris and support team for their co-operation and team spirit for keeping up the momentum and time schedule of the study.

## **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 2012<sup>1</sup>. The first quarter from January to June has reported an increase of +5% (22 million) international arrivals worldwide for the same period in 2011<sup>2</sup>. 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 2010<sup>3</sup>. 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.

<sup>1</sup>UNWTO Barometer Vol 10, January 2012

<sup>2</sup>UNWTO Barometer Vol 10, September 2012,

[http://dtxqt4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto\\_barom12\\_05\\_sept\\_excerpt.pdf](http://dtxqt4w60xqpw.cloudfront.net/sites/all/files/pdf/unwto_barom12_05_sept_excerpt.pdf)

<sup>3</sup><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.

## 1.1 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:

- 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?

### 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.

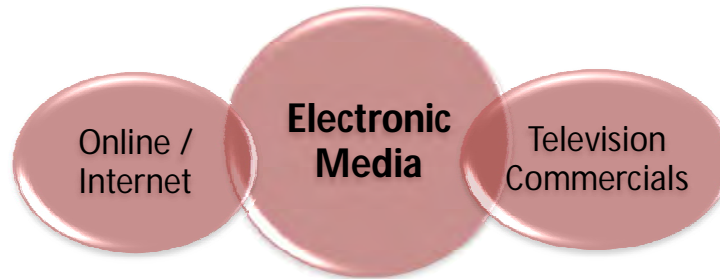


- ii. Desire mapping of the tourists proposing to visit India.
- iii. The inadequacy in the publicity and marketing strategy of India in attracting the tourists.
- iv. Impression of the tour operators in sustainability of the current campaign in terms of Quality and Content.
- v. Role of India Tourism 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.

## 1.2 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.

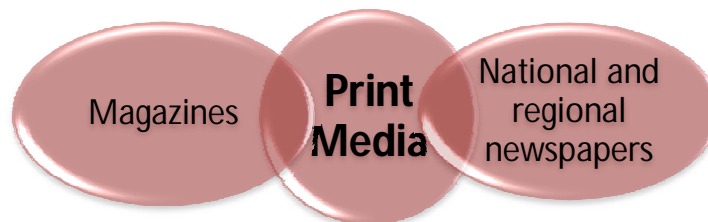
The Foreign Nationals and Outbound / International Tour Operators who are viewers of electronic media and readers of print media were interviewed for the study. Electronic Media consisted of:



Online / Internet - advertisements in

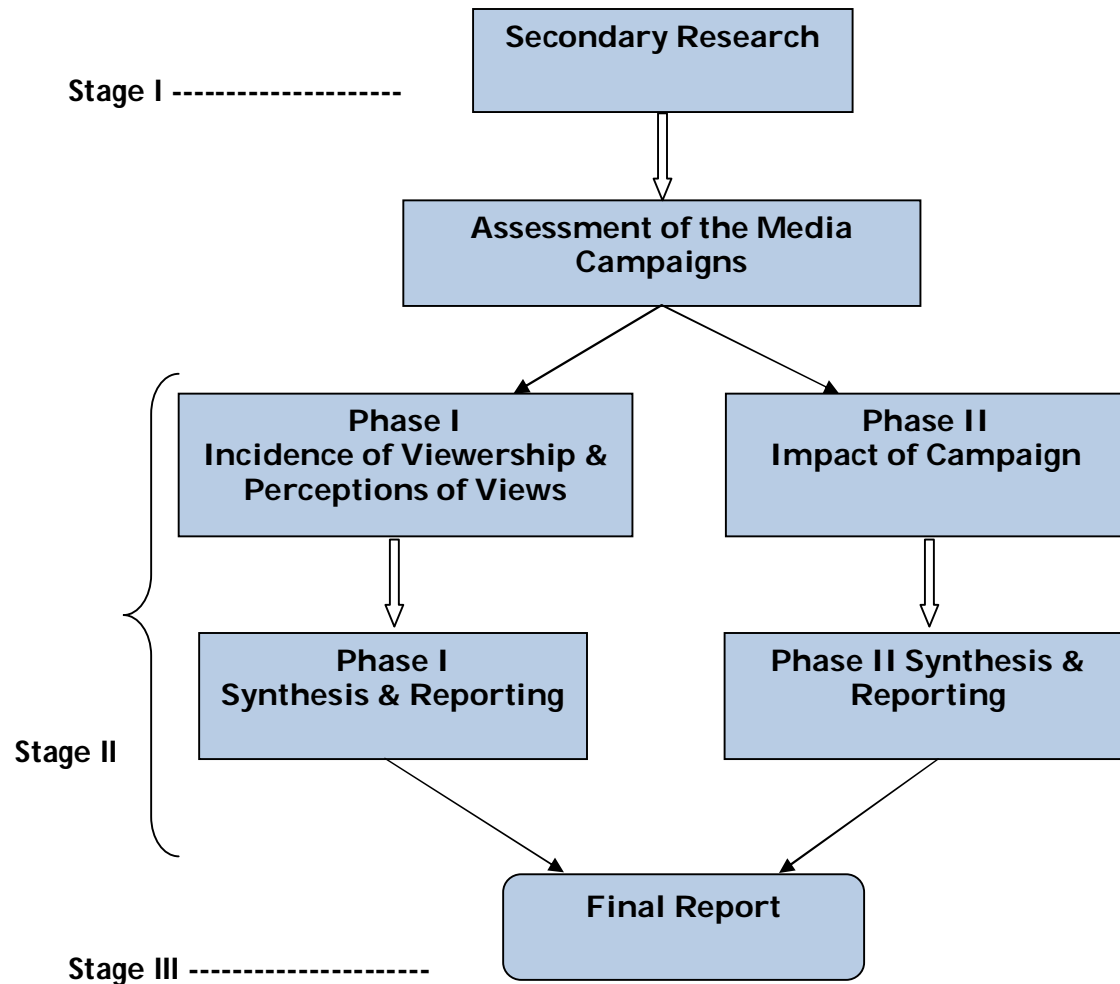
- ✚ Social networking sites like Face book
- ✚ Travel Websites
- ✚ You Tube
- ✚ Search Engines like Google, Yahoo, etc.

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

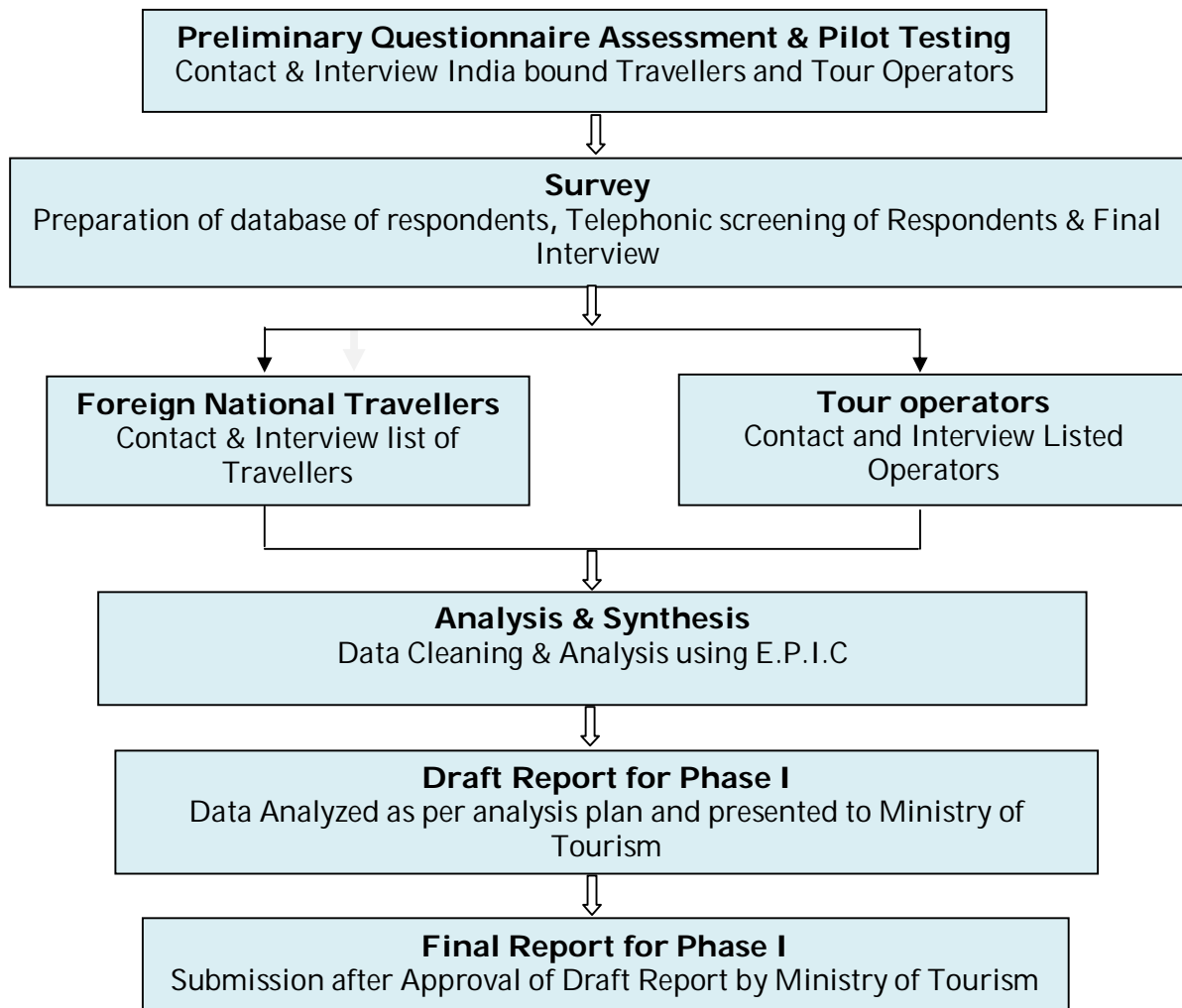
## **2. Stage II : Assessment of the Media Campaign**

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.

### 1.3 Sample Covered

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

Country	Category of Respondents		Total
	Past India Travellers	Past Other Country Travellers	
France	600	457	1057

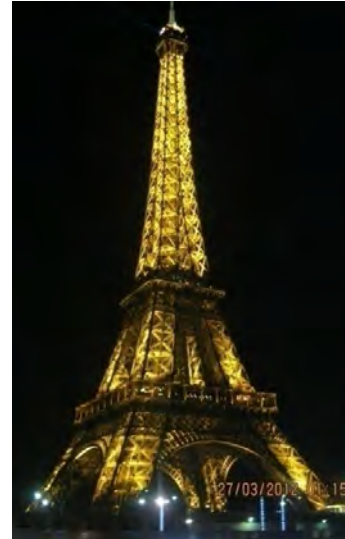
The total number of respondents who were contacted for the survey, are as follows

	FRANCE
Completed Sample / Interviews	1057
Targeted Respondents for Achieving Sample	7009
Incidence / Hit Rate	15%

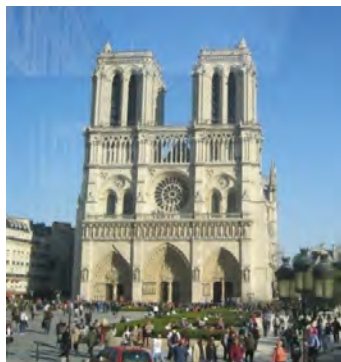
## CHAPTER TWO Phase -I

### 2.1 Brief Introduction to the Country - France

France is one of the world's most developed countries and is the world's fifth largest economy measured by GDP, the ninth-largest economy measured by purchasing power parity and is Europe's second largest economy by nominal GDP. France is the wealthiest nation in the European Union and the fourth wealthiest in the world. France is a founding member of the United Nations and one of the five permanent members of the UN Security Council. It is also a founding and leading member state of the European Union and the largest one by area.



France is renowned for a high standard of living as well as a high public education level, and has also one of the world's longest life expectancies. France is well known for its culture which consists of Painting, Architecture, Fashion, Cinema, Music, Literature, Food, Sports, etc and also famous for the various kinds of wines it produces.



It is the most visited country in the world. France has 37 sites inscribed in UNESCO's World Heritage List and features cities of high cultural interest (Paris being the foremost, but also Toulouse, Strasbourg, Bordeaux, Lyon, and others), beaches and seaside resorts, ski resorts, and rural regions that many enjoy for their beauty and tranquillity. The popular cities of France are Paris, Lyon, Nice, Marseilles, Bordeaux, Cannes, etc.

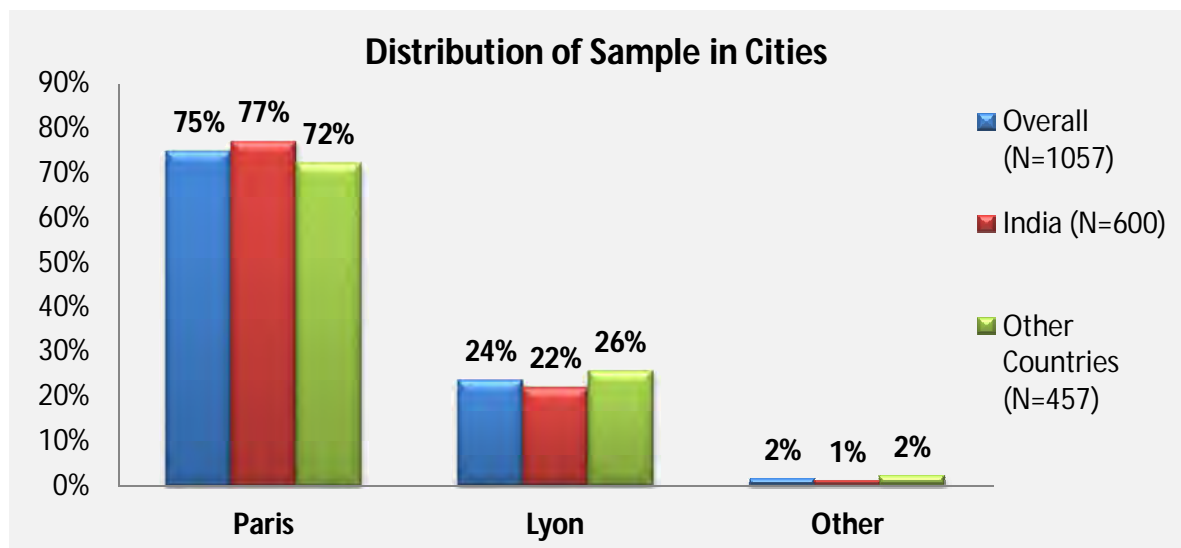
## 2.2 Primary Study Findings - France

### 2.2.1 Demography of Travellers

A total of 1057 travelers were interviewed in the country of France. 600 of the 1057 respondents were travelers who have visited India in the past and the remaining 457 were travelers who have visited countries other than India in the past.

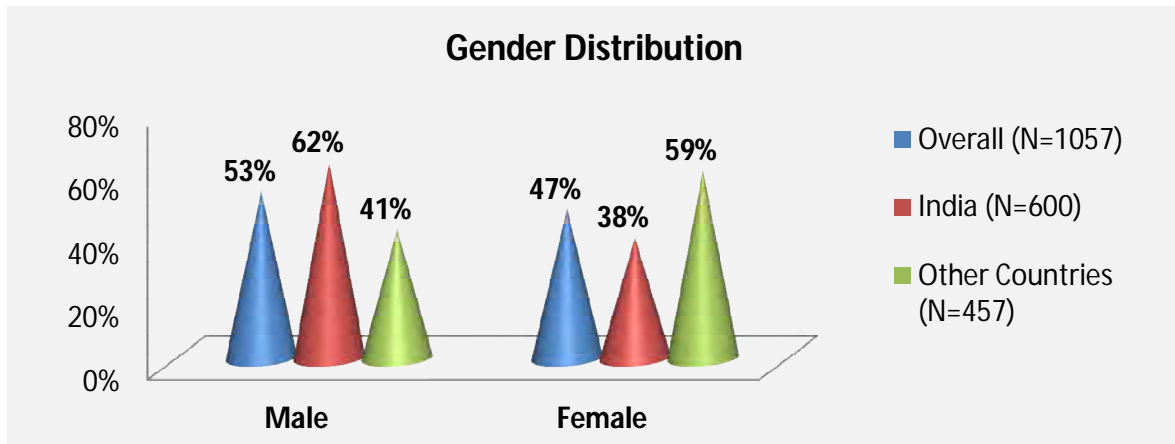
#### 2.2.1.1 Distribution of Travellers in Cities

75% of the travellers (792) were interviewed in Paris, followed by 24% travellers (249) in Lyon. The rest 2% of travellers belonged to other cities. Past travellers to India reside in Paris slightly more than the past travellers to other countries.



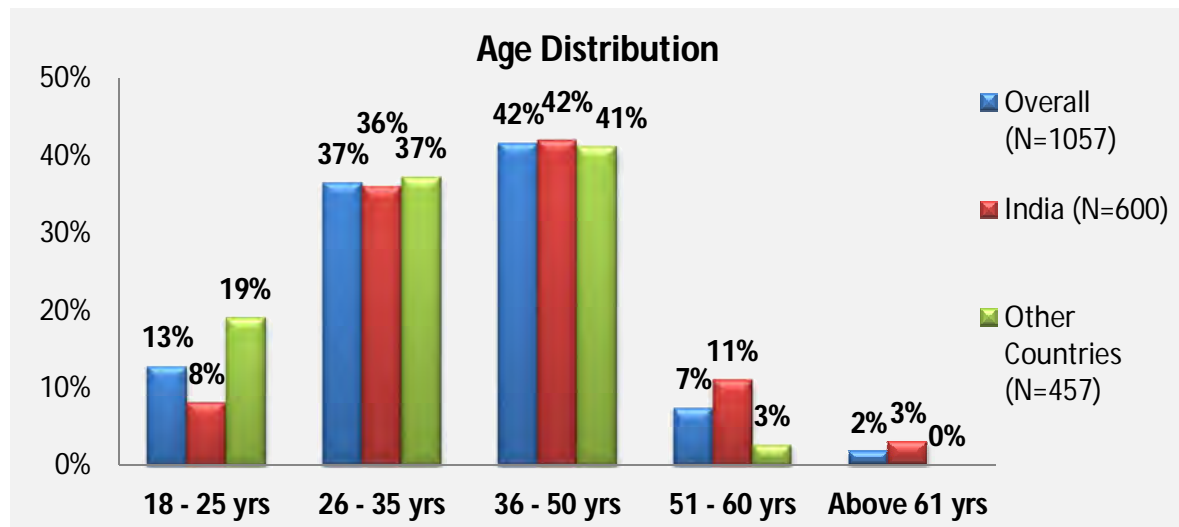
#### 2.2.1.2 Gender Distribution of Travellers

53% of the travellers (558) were males and 47% of the travellers (499) were females. Past travellers to India are more males whereas past travellers to other countries are more females.



### 2.2.1.3 Age Distribution of Travellers

Majority of travellers belong to the age group of 26 to 50 years (79% of total 1057 travellers surveyed in France). Out of the majority, 42% belongs to the age group of 36-50 years and the rest 37% belong to the age group of 26-35 years. 13% of the travellers belong to the age group of 18-25 years and 7% are 51-60 years of age. Only 18 travellers interviewed were above 61 years of age. In the age group of 18-25 years, there was more than double the number of past travellers to other countries than past travellers to India. In the age group of 51-60 years consisted of more past travellers to India than past travellers to other countries.



## 2.2.2 Travel Behaviour

### 2.2.2.1 Countries Travelled in Past by Travellers

600 travellers (57% of total interviewed in France) had travelled to India in the past. 457 travellers had travelled to other countries in the past. Out of the other countries visited by 458 travellers from France, Spain is the top most with 12% (558 visits) of total visits, followed by Italy (11%), UK (10%) and USA (10%).

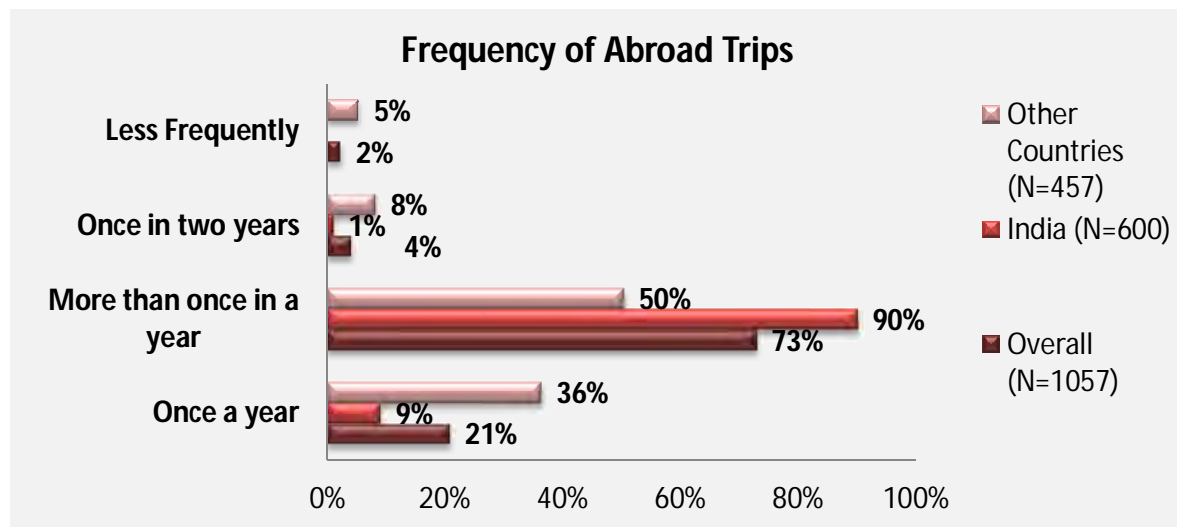
	Frequency	Percent
India	600	57%
Other	457	43%
Total	1057	100%

Country	Frequency	Percent
USA	465	10%
UK	472	10%
France	0	0%
Italy	515	11%
Spain	558	12%
Germany	389	8%
Malaysia	97	2%
Indonesia	153	3%
Thailand	229	5%
China	189	4%

Japan	178	4%
Australia	138	3%
UAE	151	3%
Russia	81	2%
Other North American Countries	132	3%
Latin American Countries	198	4%
Other European Countries	388	8%
Other Middle Eastern Countries	178	4%
Other Asian Countries	166	4%
<b>Total</b>	<b>4677</b>	<b>100%</b>

### 2.2.2.2 Frequency of Abroad Trips by Travellers

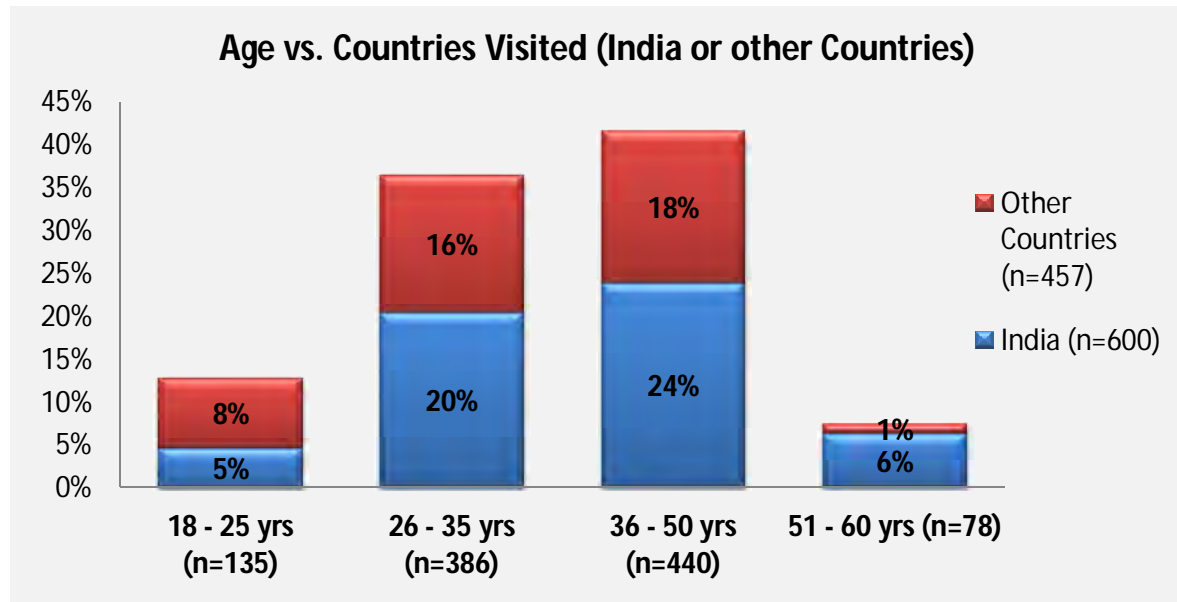
Majority of the travellers from France (73%) travel more than once in a year. 21% of the total (220 respondents) mentioned that they travel abroad once in a year. 4% of the total respondents from France travel once in 2 years while the remaining 2% travel abroad less frequently. Past travellers to India travel more frequently than past travellers to other countries.



### 2.2.2.3 Age of Travellers against Countries Travelled in Past

20% of the total respondents belong to the age group of 26-35 years and have visited India in the past and 24% of travellers belonging to age group

of 36-50 years have travelled to India. 18% of the total travellers have visited countries other than India in the recent past and belong to the age group of 36-50 years.



#### 2.2.2.4 Age of Travellers against Other Countries Travelled

Travellers belonging to the age group of 26-35 years have mostly travelled to Spain (4.2%), Italy (4%), UK (3.7%) and USA (4%). Travellers belonging to the age group of 36-50 years have mostly travelled to Spain (4.9%), Italy (4.6%), UK (4.4%) and USA (4.2%).

Country	18 - 25 yrs	26 - 35 yrs	36 - 50 yrs	51 - 60 yrs	Above 61 yrs	Total
USA	39	187	196	37	6	465
UK	74	172	204	22	0	472
France						0
Italy	68	187	216	32	12	515
Spain	78	195	227	52	6	558
Germany	34	158	158	33	6	389
Malaysia	1	37	47	6	6	97
Indonesia	1	67	59	20	6	153
Thailand	18	66	119	26	0	229

China	4	87	79	13	6	189
Japan	9	78	91	0	0	178
Australia	7	70	54	7	0	138
UAE	8	43	82	12	6	151
Russia	1	34	38	8	0	81
Other North American Countries	6	42	64	14	6	132
Latin American Countries	7	72	101	12	6	198
Other European Countries	38	183	155	6	6	388
Other Middle Eastern Countries	9	55	88	20	6	178
Other Asian Countries	5	52	70	33	6	166
<b>Total</b>	<b>407</b>	<b>1785</b>	<b>2048</b>	<b>353</b>	<b>84</b>	<b>4677</b>

Country	18 - 25 yrs	26 - 35 yrs	36 - 50 yrs	51 - 60 yrs	Above 61 yrs	Total
USA	0.8%	4.0%	4.2%	0.8%	0.1%	9.9%
UK	1.6%	3.7%	4.4%	0.5%	0.0%	10.1%
France	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Italy	1.5%	4.0%	4.6%	0.7%	0.3%	11.0%
Spain	1.7%	4.2%	4.9%	1.1%	0.1%	11.9%
Germany	0.7%	3.4%	3.4%	0.7%	0.1%	8.3%
Malaysia	0.0%	0.8%	1.0%	0.1%	0.1%	2.1%
Indonesia	0.0%	1.4%	1.3%	0.4%	0.1%	3.3%
Thailand	0.4%	1.4%	2.5%	0.6%	0.0%	4.9%
China	0.1%	1.9%	1.7%	0.3%	0.1%	4.0%
Japan	0.2%	1.7%	1.9%	0.0%	0.0%	3.8%
Australia	0.1%	1.5%	1.2%	0.1%	0.0%	3.0%
UAE	0.2%	0.9%	1.8%	0.3%	0.1%	3.2%
Russia	0.0%	0.7%	0.8%	0.2%	0.0%	1.7%
Other North American Countries	0.1%	0.9%	1.4%	0.3%	0.1%	2.8%
Latin American Countries	0.1%	1.5%	2.2%	0.3%	0.1%	4.2%
Other European Countries	0.8%	3.9%	3.3%	0.1%	0.1%	8.3%
Other Middle Eastern Countries	0.2%	1.2%	1.9%	0.4%	0.1%	3.8%
Other Asian Countries	0.1%	1.1%	1.5%	0.7%	0.1%	3.5%
<b>Total</b>	<b>8.7%</b>	<b>38.2%</b>	<b>43.8%</b>	<b>7.5%</b>	<b>1.8%</b>	<b>100.0%</b>

## 2.2.3 "Incredible India" Advertisement Campaign

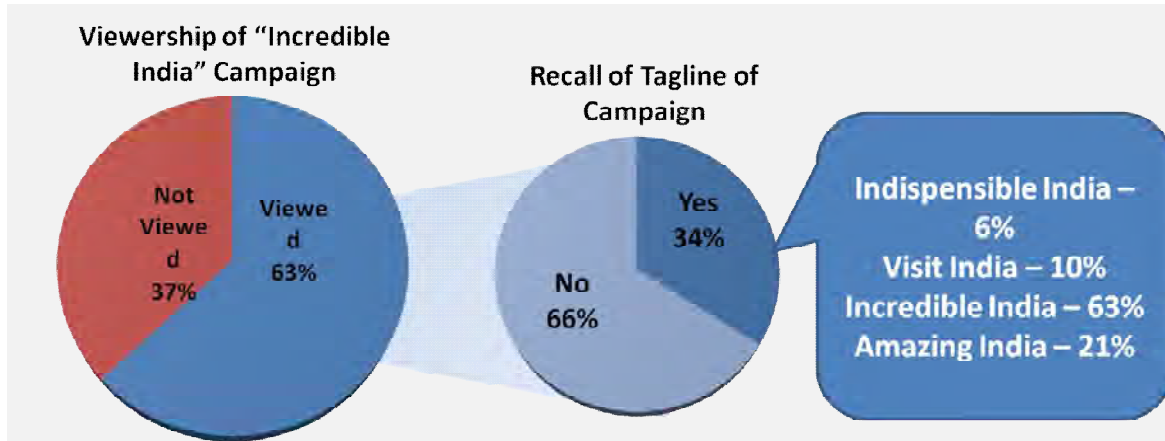
### 2.2.3.1 Viewership of Any "Incredible India" Campaign

63% of the total 1057 respondents mentioned that they have seen "Incredible India" campaigns. Out of the 63% who have viewed it, 34% mentioned that they could recall the tagline of the campaign. Out of the 34% who could recall the tagline, 63% could recall the Tagline of "Incredible India" exactly. Past travellers to India have viewed the

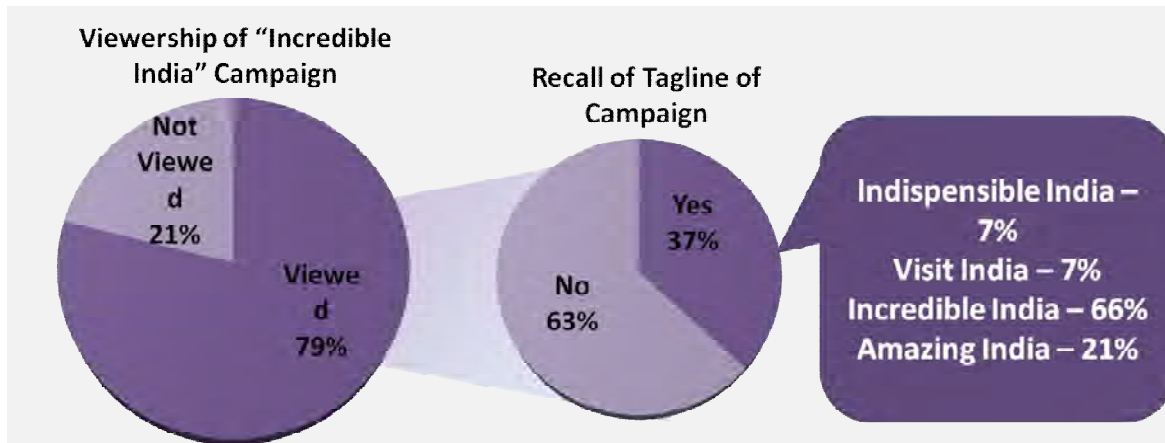


campaigns of "Incredible India" more than the past travellers to other countries.

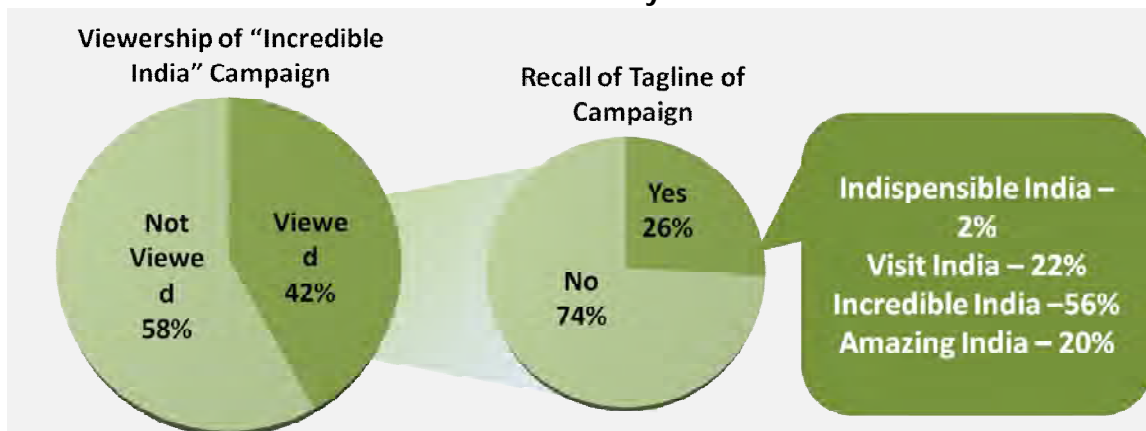
### All Travellers



### Past India Travellers



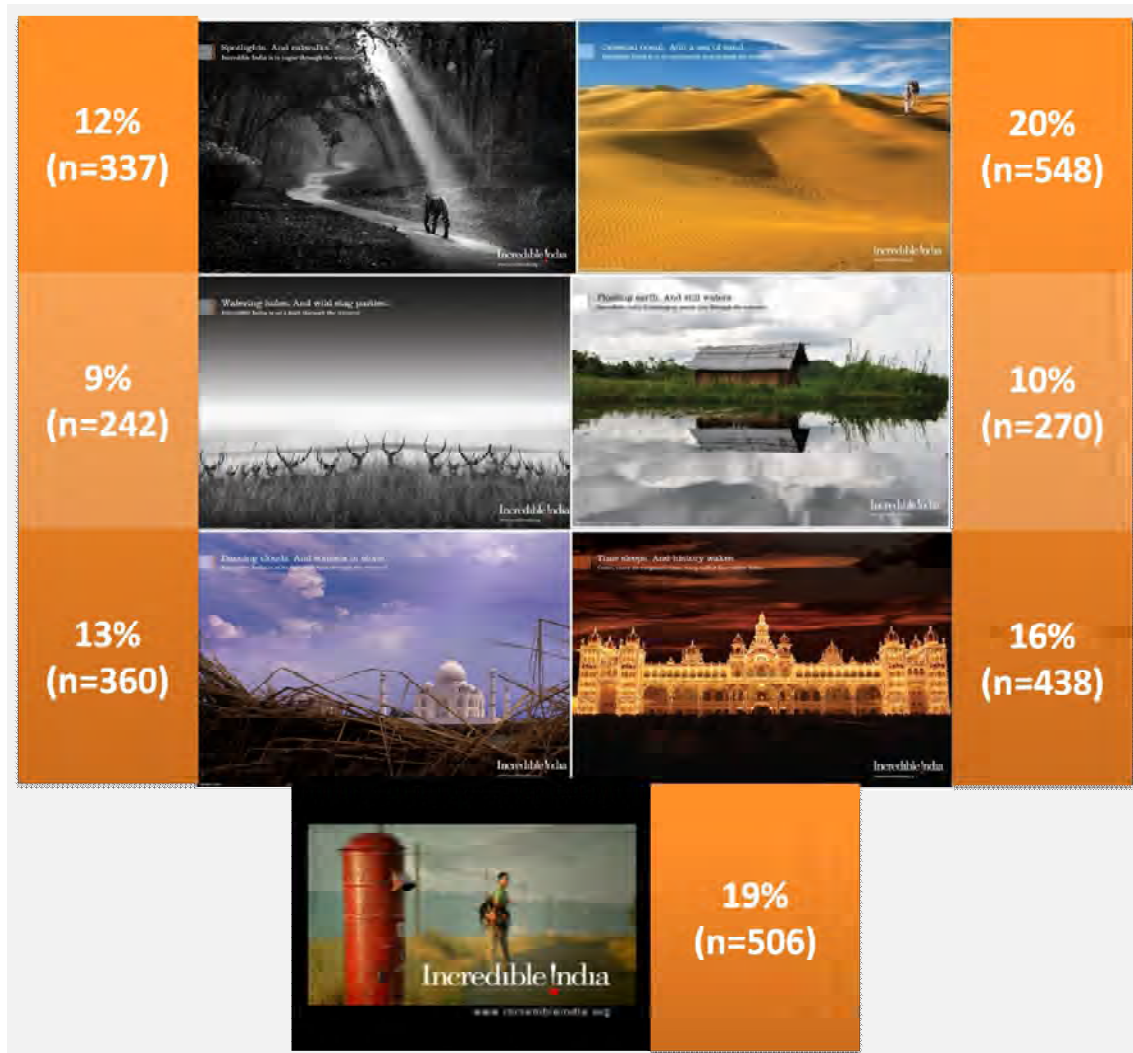
### Past Other Country Travellers



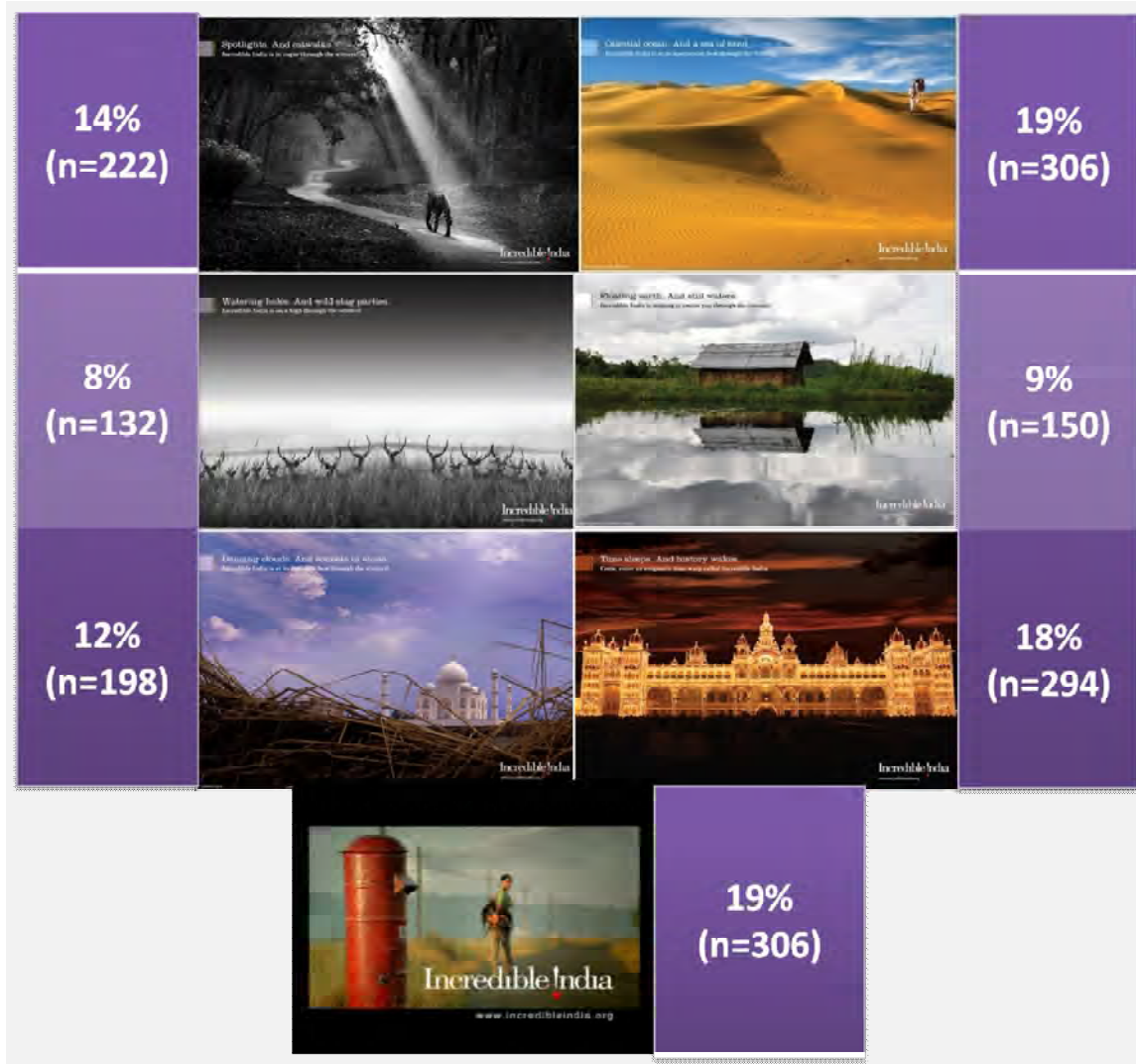
### 2.2.3.2 Viewership of Current Advertisements of the Campaign

Out of the 6 print advertisements and 1 video advertisement, the most viewed advertisement was the “Celestial Ocean” ad featuring the deserts of India. The second most viewed advertisement was the video (19%), followed by the Mysore palace (16%) and Taj Mahal (13%). The least viewed advertisement was the print advertisement featuring stags in Corbett National Park (9%). The past travellers to other countries have watched the video advertisement more than the past travellers to India.

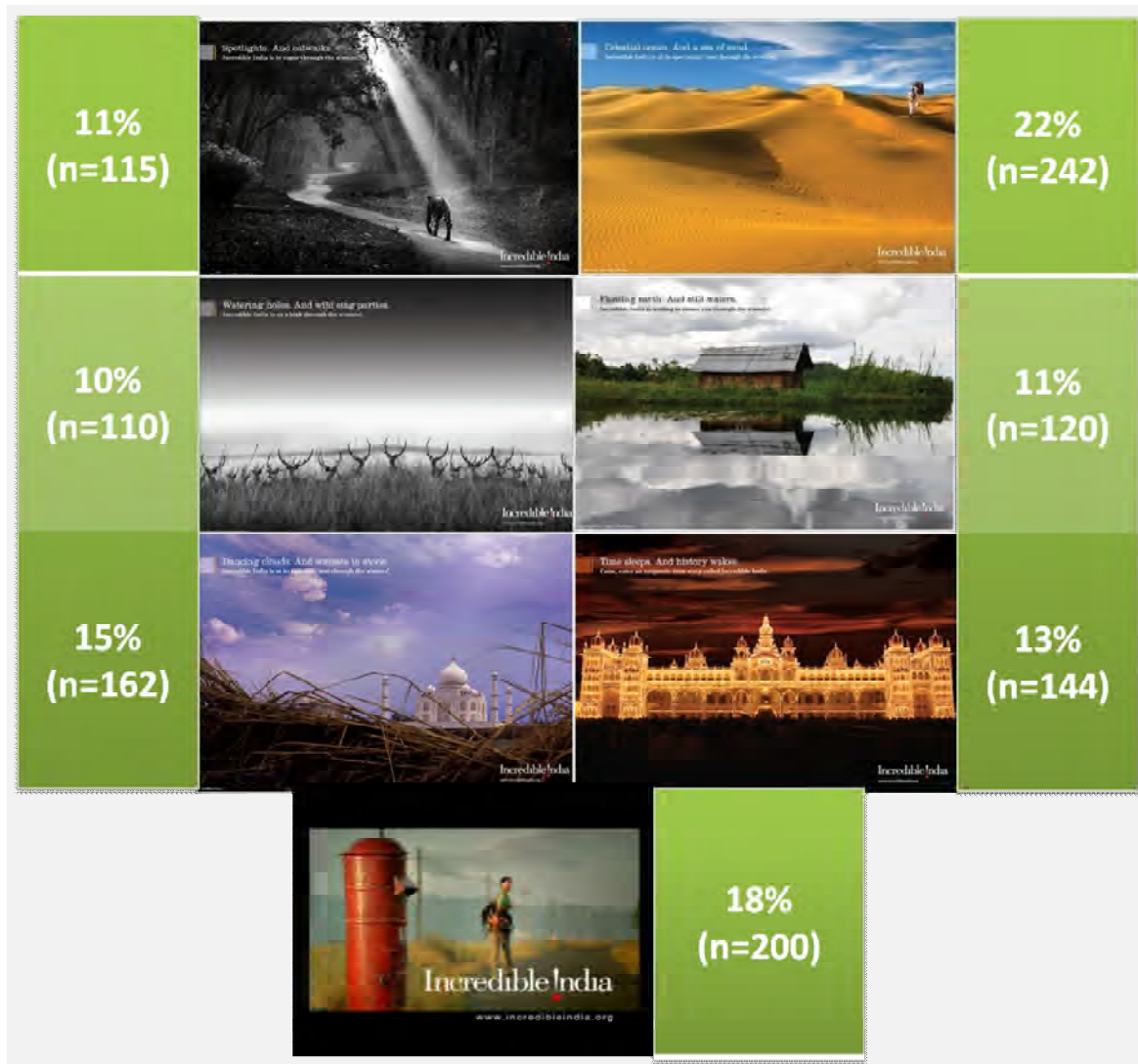
#### All Travellers



### Past India Travellers



### Past Other Country Travellers

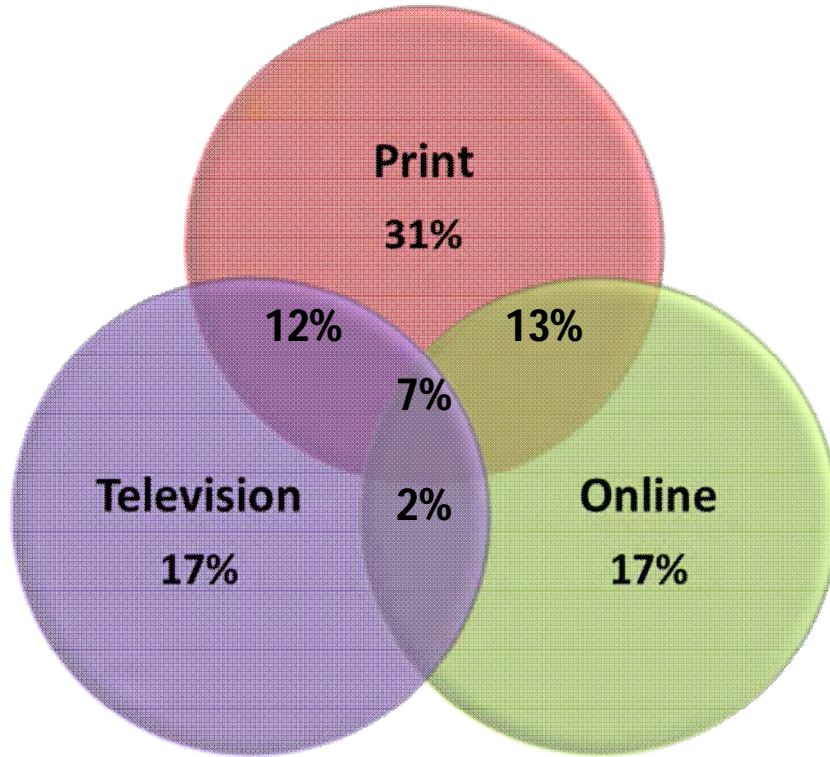


### 2.2.3.3 Advertisement Viewing Medium

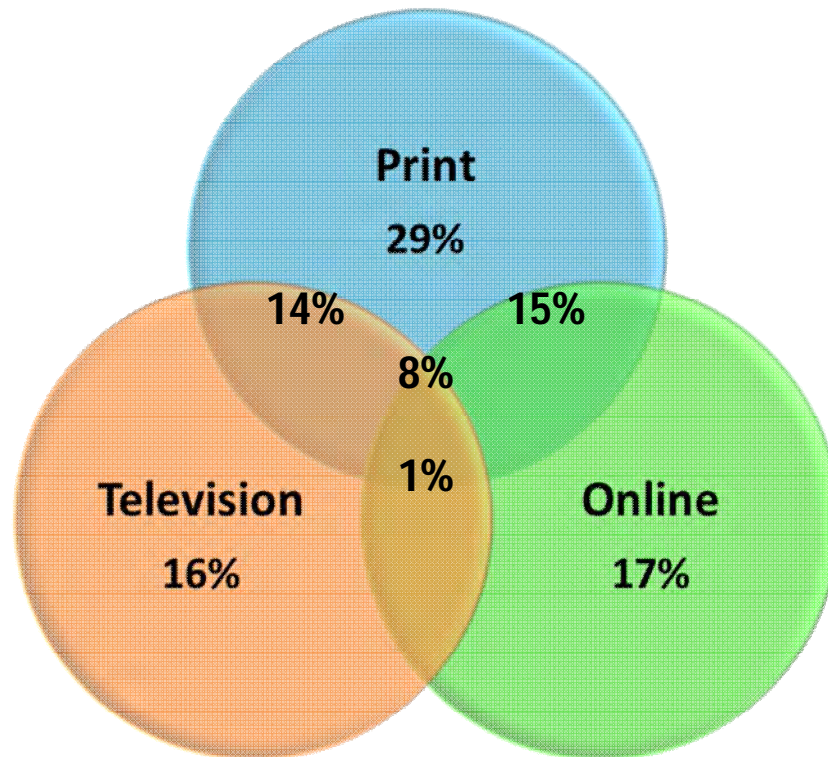
31% of the total 1057 respondents saw the advertisements in the print media only. 7% of the total 1047 respondents saw the advertisements in all the three mediums of print, television and online. 17% of the total 1057 respondents mentioned that they saw the advertisements only online and 17% only in television. Past travellers to other countries have viewed the advertisements more in the print, television and online media exclusively than the past

travellers to India. Past travellers to India watched the advertisements more in dual mediums.

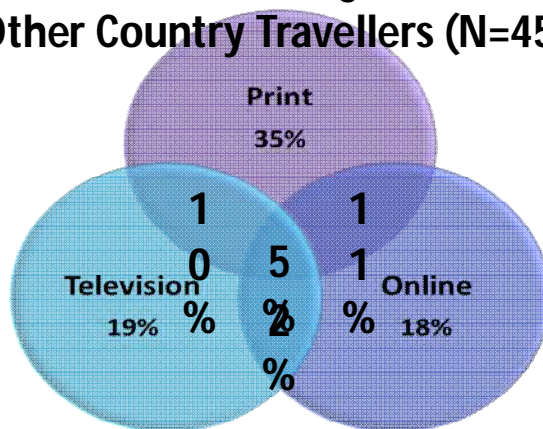
**Advertisement Viewing Medium – All Travellers (N=1057)**



### Advertisement Viewing Medium – Past India Travellers (N=600)



### Advertisement Viewing Medium – Past Other Country Travellers (N=457)



#### 2.2.3.4 Television Channel in Which Advertisement was Viewed

In France, BBC (15%, 169 views) followed by National Geographic (10%, 111 views), were the channels where the video advertisement was most viewed. Apart from the “other” channels, Dmax was the channel where the video advertisement was least viewed, where only 1 view of total views of the advertisement was reported.

Television	Overall		India		Other Countries	
	n	%	n	%	n	%
CNN	103	9%	72	9%	31	9%
CNN Airport Network	35	3%	24	3%	11	3%
BBC	169	15%	126	16%	43	13%
Sky News	72	6%	54	7%	18	5%
National Geographic Channel	111	10%	78	10%	33	10%
CBS	38	3%	30	4%	8	2%
Travel Channel	88	8%	72	9%	16	5%
Discovery	100	9%	72	9%	28	8%
Dmax	1	0%	0	0%	1	0%
TLC	11	1%	6	1%	5	1%
History	42	4%	18	2%	24	7%
Veria Health Channel	9	1%	6	1%	3	1%
Animal Planet	61	5%	42	5%	19	6%
Euro News	97	9%	60	8%	37	11%
Euro Sports	82	7%	54	7%	28	8%
CNBC	27	2%	18	2%	9	3%
MTV	47	4%	30	4%	17	5%
Any Other	32	3%	24	3%	8	2%
<b>Total</b>	<b>1125</b>	<b>100%</b>	<b>786</b>	<b>100%</b>	<b>339</b>	<b>100%</b>

Other Television Channels	Overall		India		Other Countries	
	n	%	n	%	n	%
Cannot remember exactly which channel	12	38%	0	0%	12	60%
Paris Premier	1	3%	0	0%	1	5%
Pas Vue	6	19%	6	50%	0	0%
Planet	1	3%	0	0%	1	5%
TF1	3	9%	0	0%	3	15%
TNT	1	3%	0	0%	1	5%
Voyage	6	19%	6	50%	0	0%
W9	2	6%	0	0%	2	10%
<b>Total</b>	<b>32</b>	<b>100%</b>	<b>12</b>	<b>100%</b>	<b>20</b>	<b>100%</b>

### 2.2.3.5 Newspapers / Magazines Where the Advertisements was Viewed

Amongst Global and French print media, Le Nouvel Observateur, was the magazine where the most views (19.2%, 227 views) of the print ads was

reported by respondents, irrespective of whether they are past travellers to India or to other countries. The second highest magazine where the print advertisements were viewed was Air France In-flight Magazine with 16.9% (200 views). The least views of print ads was reported Harvard Business Review (0.7%, 8 views) and How to Spend It (0.7%, 8 views).

Print (Global + France)	Overall		India		Other Countries	
	n	%	n	%	n	%
Harvard Business Review	8	0.7%	6	0.8%	2	0.5%
International Herald Tribune	63	5.3%	54	7.0%	9	2.2%
Conference + Meetings World Magazine	25	2.1%	24	3.1%	1	0.2%
Wall Street Journal Magazine Global	33	2.8%	18	2.3%	15	3.6%
The Economist	101	8.5%	78	10.1%	23	5.6%
Financial Times Worldwide special reports	31	2.6%	24	3.1%	7	1.7%
How To Spend It	8	0.7%	6	0.8%	2	0.5%
Global Traveler	40	3.4%	18	2.3%	22	5.4%
Associations & Meeting International	13	1.1%	12	1.6%	1	0.2%
Grand Reportage	114	9.6%	72	9.3%	42	10.2%
Elle	149	12.6%	78	10.1%	71	17.3%
Le Nouvel Observateur	227	19.2%	144	18.6%	83	20.2%
Serie Limitee	23	1.9%	12	1.6%	11	2.7%
Air France In-flight Magazine	200	16.9%	126	16.3%	74	18.0%
Delta Sky (In-flight Magazine of Delta Airlines)	106	8.9%	78	10.1%	28	6.8%
Any Other	44	3.7%	24	3.1%	20	4.9%
<b>Total</b>	<b>1185</b>	<b>100.0%</b>	<b>774</b>	<b>100.0%</b>	<b>411</b>	<b>100.0%</b>

USA & Australian Print Media	Overall		India		Other Countries	
	n	%	n	%	n	%
Harper's Bazaar	21	2.8%	18	3.3%	3	1.5%
Forbes Magazine	27	3.6%	18	3.3%	9	4.5%
New York Times T Magazine	69	9.3%	48	8.9%	21	10.4%
Washington Post Magazine	35	4.7%	30	5.6%	5	2.5%
Chicago Tribune Magazine	18	2.4%	12	2.2%	6	3.0%
Chronicle Magazine	20	2.7%	18	3.3%	2	1.0%
Robb Report	9	1.2%	6	1.1%	3	1.5%
The New Yorker	29	3.9%	18	3.3%	11	5.4%
Fortune US	37	5.0%	30	5.6%	7	3.5%
National Geographic Traveller	175	23.6%	108	20.0%	67	33.2%
Australian Gourmet Traveller	22	3.0%	18	3.3%	4	2.0%



Sunday Magazine	39	5.3%	30	5.6%	9	4.5%
The Weekend Australian Magazine	38	5.1%	36	6.7%	2	1.0%
Wish	6	0.8%	6	1.1%	0	0.0%
American Express Publications	132	17.8%	90	16.7%	42	20.8%
Conde Nast Traveler	32	4.3%	30	5.6%	2	1.0%
Reader's Digest	33	4.4%	24	4.4%	9	4.5%
<b>Total</b>	<b>742</b>	<b>100.0%</b>	<b>540</b>	<b>100.0%</b>	<b>202</b>	<b>100.0%</b>

Other Print Media	Overall		India		Other Countries	
	n	%	n	%	n	%
Cannot Recall	38	86%	24	100%	14	70%
Metro	2	5%	0	0%	2	10%
RER	1	2%	0	0%	1	5%
Newsweek	1	2%	0	0%	1	5%
Agency de Voyage	1	2%	0	0%	1	5%
Le Point	1	2%	0	0%	1	5%
<b>Total</b>	<b>44</b>	<b>100%</b>	<b>24</b>	<b>100%</b>	<b>20</b>	<b>100%</b>

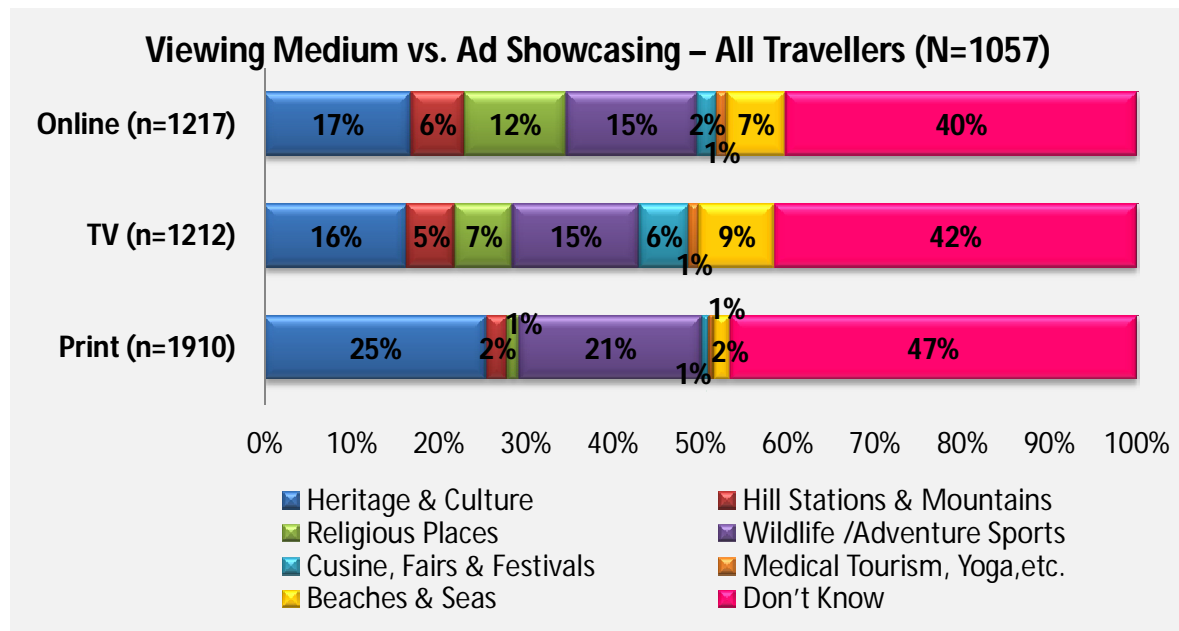
### 2.2.3.6 Online Media Where the Advertisements was Viewed

You Tube (21.3%, 178 views), followed by Facebook (19.7%, 164 views) were the websites where the advertisements were most viewed. CNBC.com with 4.3% views (36 views) was the website where the advertisements were least viewed. Apart from the above websites, BBC.com, LinkedIn and Trip advisor were the sites where past travellers to India viewed the online advertisements more than the past travellers to other countries.

Online	Overall		India		Other Countries	
	n	%	n	%	n	%
BBC.com	77	9.2%	60	11.4%	17	5.6%
Eurosports.com	47	5.6%	36	6.8%	11	3.6%
CNBC.com	36	4.3%	24	4.5%	12	3.9%
LinkedIn	65	7.8%	54	10.2%	11	3.6%
Facebook	164	19.7%	84	15.9%	80	26.1%
CondeNast Traveller	40	4.8%	36	6.8%	4	1.3%
Trip advisor	122	14.6%	90	17.0%	32	10.5%
Yahoo	105	12.6%	60	11.4%	45	14.7%
You Tube	178	21.3%	84	15.9%	94	30.7%
<b>Total</b>	<b>834</b>	<b>100.0%</b>	<b>528</b>	<b>100.0%</b>	<b>306</b>	<b>100.0%</b>

### 2.2.3.7 What the Advertisements Showcased Against the Viewing Medium

17% of the respondents who viewed the advertisements in the online media felt that the advertisements showcased Heritage & Culture of India and 15% felt it showed wildlife and adventure sports, but 40% of the respondents didn't know what exactly it tried to showcase. Similarly, the respondents, who viewed the advertisements in the Television (42%) and in print (47%), didn't understand exactly what the advertisements showcased.

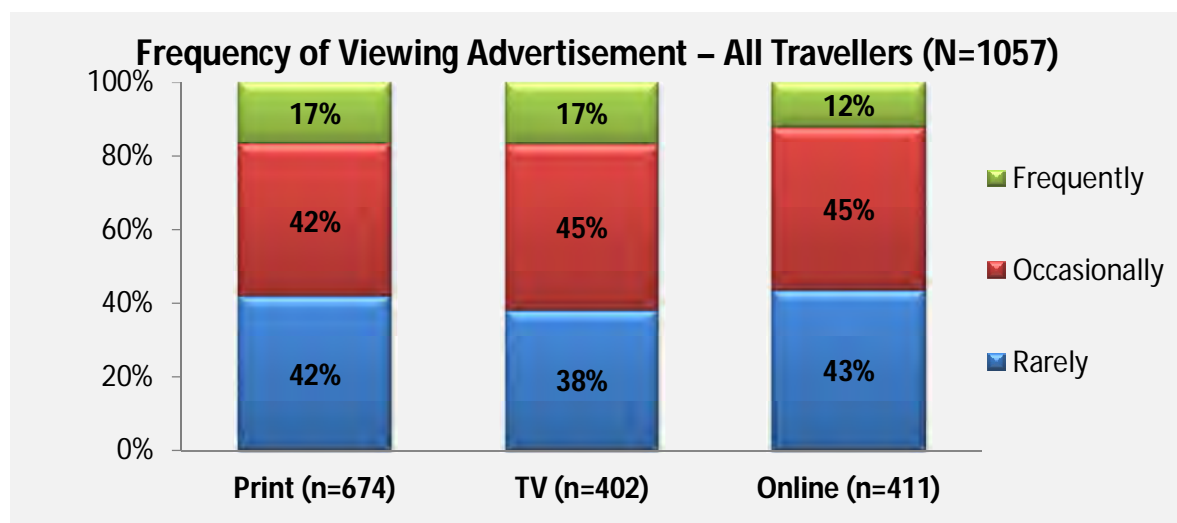


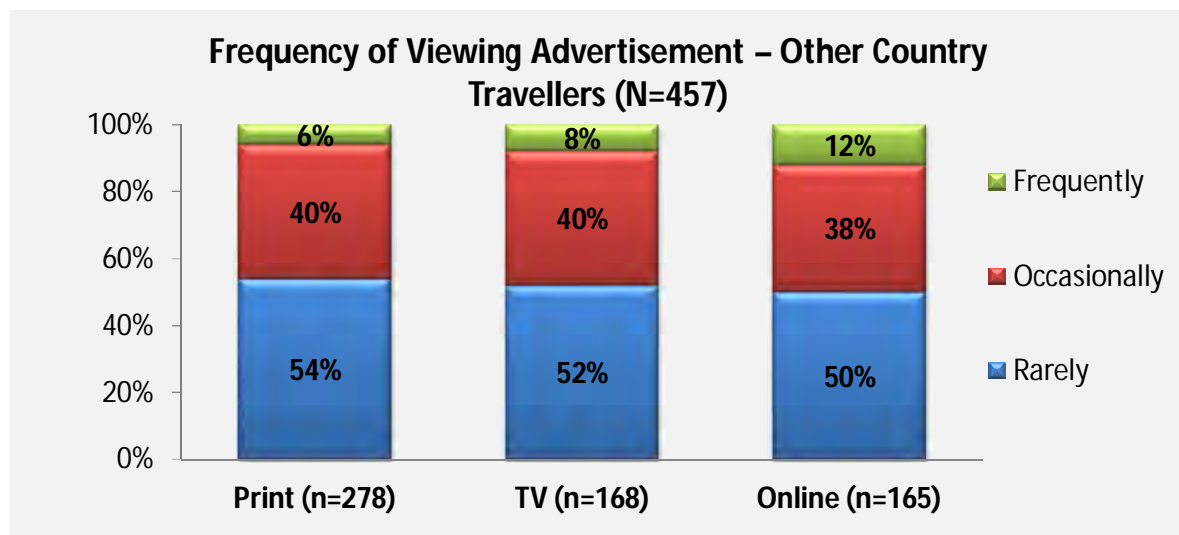
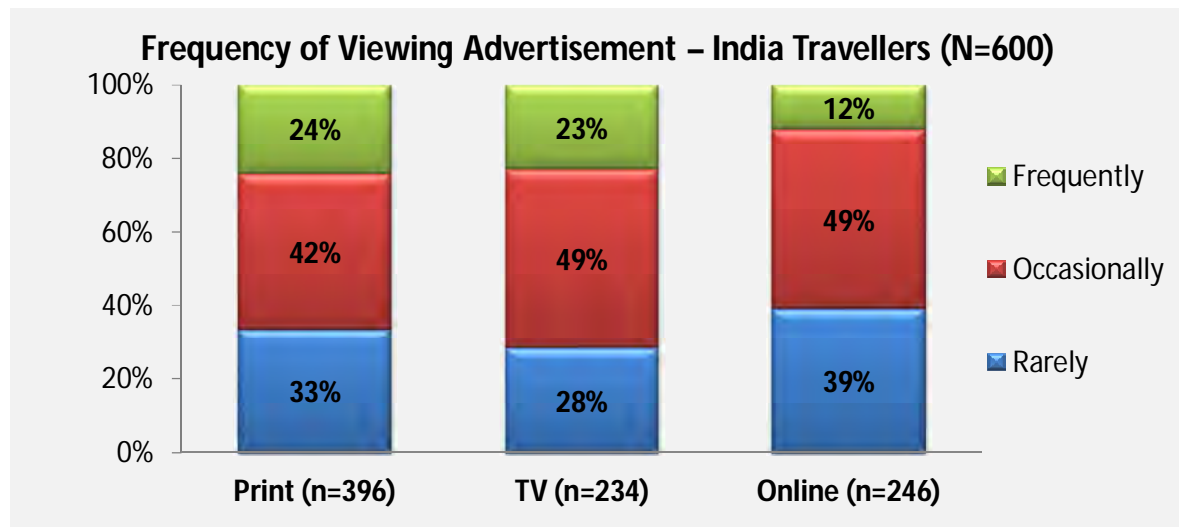
	India						Other					
	Print		Electronic		Online		Print		Electronic		Online	
	n	%	n	%	n	%	n	%	n	%	n	%
Heritage & Culture	212	18%	124	16%	140	20%	275	38%	75	22%	65	12%
Hill Stations & Mountains	10	1%	12	2%	48	7%	36	5%	54	16%	26	5%
Religious Places	12	1%	20	3%	20	3%	13	2%	60	18%	122	23%
Wildlife/Adventure Sports	280	23%	114	15%	102	15%	120	17%	62	19%	81	16%
Cuisine along with Fairs & Festivals	8	1%	14	2%	12	2%	8	1%	55	16%	15	3%

Medical Tourism/Yoga/Spiritualism/Meditation	3	0%	9	1%	4	1%	7	1%	5	1%	10	2%
Beaches & Seas	12	1%	82	11%	50	7%	24	3%	23	7%	32	6%
Don't Know	657	55%	387	51%	320	46%	233	33%	116	35%	170	33%
<b>Total</b>	<b>1194</b>	<b>100%</b>	<b>762</b>	<b>100%</b>	<b>696</b>	<b>100%</b>	<b>716</b>	<b>100%</b>	<b>334</b>	<b>100%</b>	<b>521</b>	<b>100%</b>

### 2.2.3.8 Frequency of Viewing Advertisement

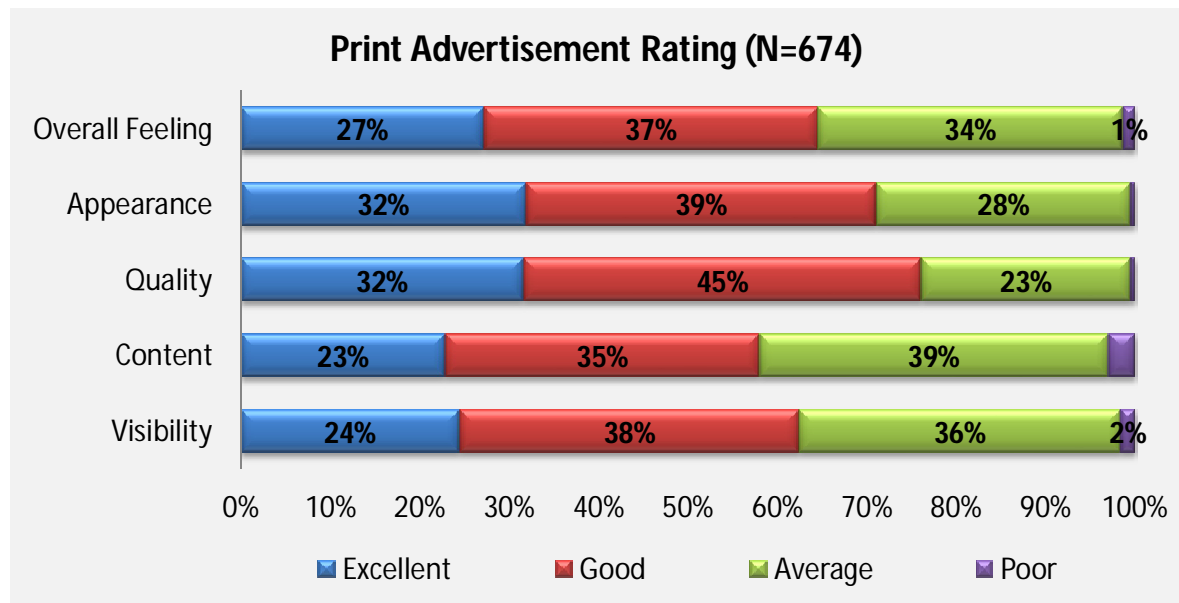
In the online media, the advertisements were the least frequently viewed (12%). In the print media and in television, the advertisements were more occasionally viewed than frequently. 42% each of the total respondents who viewed the advertisements in the print media said that they sighted the advertisements occasionally and rarely. 45% of the respondents, who viewed the advertisements in the television, mentioned that they sighted the advertisements occasionally. In the print and television, the past travellers to other countries reported less frequent sighting of the advertisements than the past travellers to India.





### 2.2.3.9 Opinion on the Advertisements in the Print Media

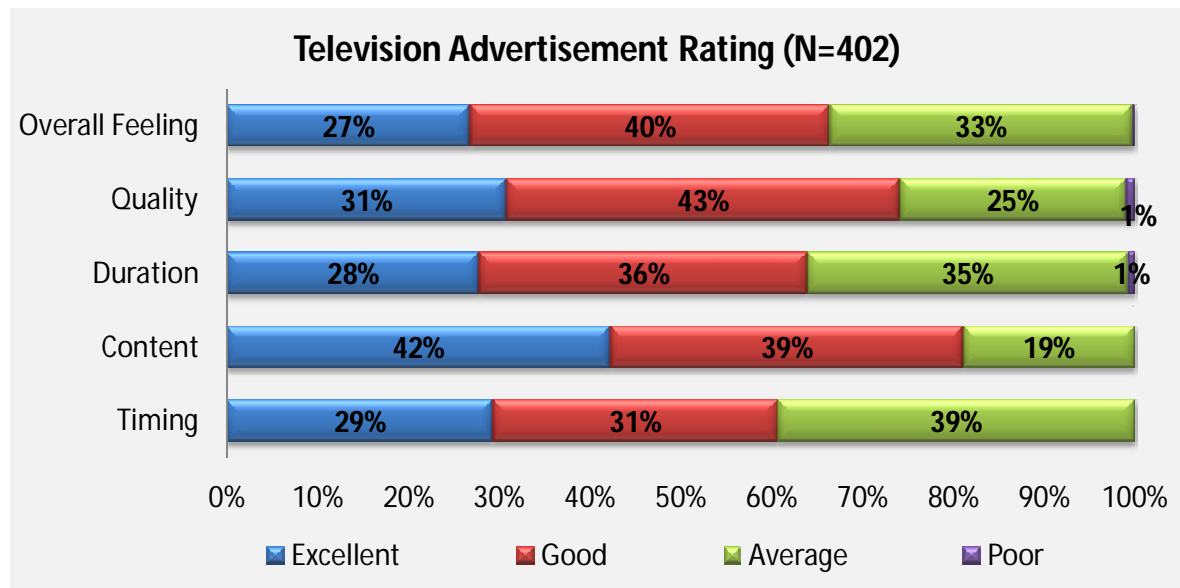
In the print media, the visibility (45%), appearance (47%), quality (47%) and overall feeling (52%) about the advertisements were good. Past travellers to India felt that the print advertisements were good in all the respects. The past travellers to other countries felt that the print advertisements are excellent in appearance.



	Print Media - Percentage- India					Print Media - Percentage - Other				
	Excellent	Good	Average	Poor	Total	Excellent	Good	Average	Poor	Total
Visibility	26%	41%	31%	2%	100%	22%	34%	42%	2%	100%
Content	21%	44%	33%	3%	100%	26%	23%	48%	4%	100%
Quality	30%	47%	23%	0%	100%	33%	41%	24%	1%	100%
Appearance	27%	44%	29%	0%	100%	38%	32%	28%	1%	100%
Overall Feeling	22%	47%	30%	2%	100%	35%	24%	40%	1%	100%
Total	25%	45%	29%	1%	100%	31%	31%	37%	2%	100%

### 2.2.3.10 Opinion on the Advertisements in the Television

In the television, the content of the advertisements were rated as excellent. The timing of the advertisements was rated as average. Only 1% of the respondents found the advertisement as poor in quality and duration. 44% of past India travellers found the television advertisement as excellent in content. Past other country travellers found the advertisement as excellent in content.



	Television Media - Percentage - India					Television Media - Percentage - Other				
	Excellent	Good	Average	Poor	Total	Excellent	Good	Average	Poor	Total
Timing	32%	35%	33%	0%	100%	26%	26%	48%	0%	100%
Content	44%	44%	12%	0%	100%	39%	32%	29%	0%	100%
Duration	33%	56%	10%	0%	100%	20%	8%	70%	2%	100%
Quality	37%	44%	20%	0%	100%	23%	43%	32%	2%	100%
Overall Feeling	26%	51%	22%	0%	100%	27%	23%	49%	1%	100%
<b>Total</b>	<b>35%</b>	<b>46%</b>	<b>19%</b>	<b>0%</b>	<b>100%</b>	<b>27%</b>	<b>26%</b>	<b>45%</b>	<b>1%</b>	<b>100%</b>

### 2.2.3.11 Opinion on the Advertisements in the Online Media

In the online media quality, appearance and overall feeling of the advertisement was rated as good. 3% of the total respondents mentioned that the visibility was poor. Past travellers to India rated the online advertisements as good in all the attributes. Past travellers to other countries rated the advertisements as excellent in appearance.



things in the AD	1	2	3		1	2	3		1	2	3	
Frequency of the Ad	53	8	28	89	47	10	19	76	32	4	6	42
Concept of the Ad	123	144	108	375	59	79	41	179	61	74	51	186
Beauty of the destinations	386	141	36	563	246	74	16	336	239	102	28	369
Music in the ad	0	0	0	0	14	135	81	230	15	117	58	190
Emotional attachment	64	164	159	387	29	78	110	217	50	92	119	261
Tagline/caption of the ad	48	217	339	604	7	20	131	158	14	22	149	185
Other	0	0	4	4	0	6	4	10	0	6	5	11

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	6	18	60	30	6	12	48	24	0	0	24
Concept of the Ad	78	84	42	204	36	48	18	102	30	36	24	90
Beauty of the destinations	192	102	18	312	132	48	6	186	126	72	18	216
Music in the ad	0	0	0	0	6	84	42	132	12	78	30	120
Emotional attachment	54	78	90	222	24	36	66	126	42	48	72	162
Tagline/caption of the ad	36	126	228	390	6	6	90	102	12	12	102	126
Other	0	0	0	0	0	6	0	6	0	6	0	6

Other												
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	17	2	10	29	17	4	7	28	8	4	6	18



of the Ad													
Concept of the Ad	45	60	66	171	23	31	23	77	31	38	27	96	
Beauty of the destinations	194	39	18	251	114	26	10	150	113	30	10	153	
Music in the ad	0	0	0	0	8	51	39	98	3	39	28	70	
Emotional attachment	10	86	69	165	5	42	44	91	8	44	47	99	
Tagline/caption of the ad	12	91	111	214	1	14	41	56	2	10	47	59	
Other	0	0	4	4	0	4	0	4	0	0	5	5	

### 2.2.3.13 Message Conveyed Through the Advertisements

Respondents from France were somewhat agreed on the fact that the advertisements were showcasing the variety of foods and festivals and hospitality of India. Respondents were on the fence on the advertisements trying to convey the developed rail and roads in India, a worth experiencing destination, a 360 days destination and a destination to experience yoga and spiritualism. 29% of the respondents were not clear whether the advertisements were trying to convey the heritage and culture of India. The past India travellers from France were more agreed on the advertisements showcasing variety of food and festivals, India as a 360 days destination and a destination for yoga/spiritualism, than the past travellers to other countries.

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	14	1%	23	2%	19	2%	93	9%	18	2%	30	3%	220	21%

Somewhat disagree	148	14%	109	10%	68	6%	192	18%	30	3%	104	10%	219	21%
Neither agree nor disagree	184	17%	277	26%	255	24%	358	34%	383	36%	300	28%	232	22%
Somewhat agree	282	27%	290	27%	364	34%	248	23%	307	29%	219	21%	208	20%
Very Strongly agree	121	11%	134	13%	141	13%	38	4%	189	18%	177	17%	56	5%
Don't Know	308	29%	224	21%	210	20%	128	12%	130	12%	227	21%	122	12%
<b>Total</b>	<b>1057</b>	<b>100%</b>	<b>1057</b>	<b>100%</b>	<b>1057</b>	<b>100%</b>	<b>1057</b>	<b>100%</b>	<b>1057</b>	<b>100%</b>	<b>1057</b>	<b>100%</b>	<b>1057</b>	<b>100%</b>

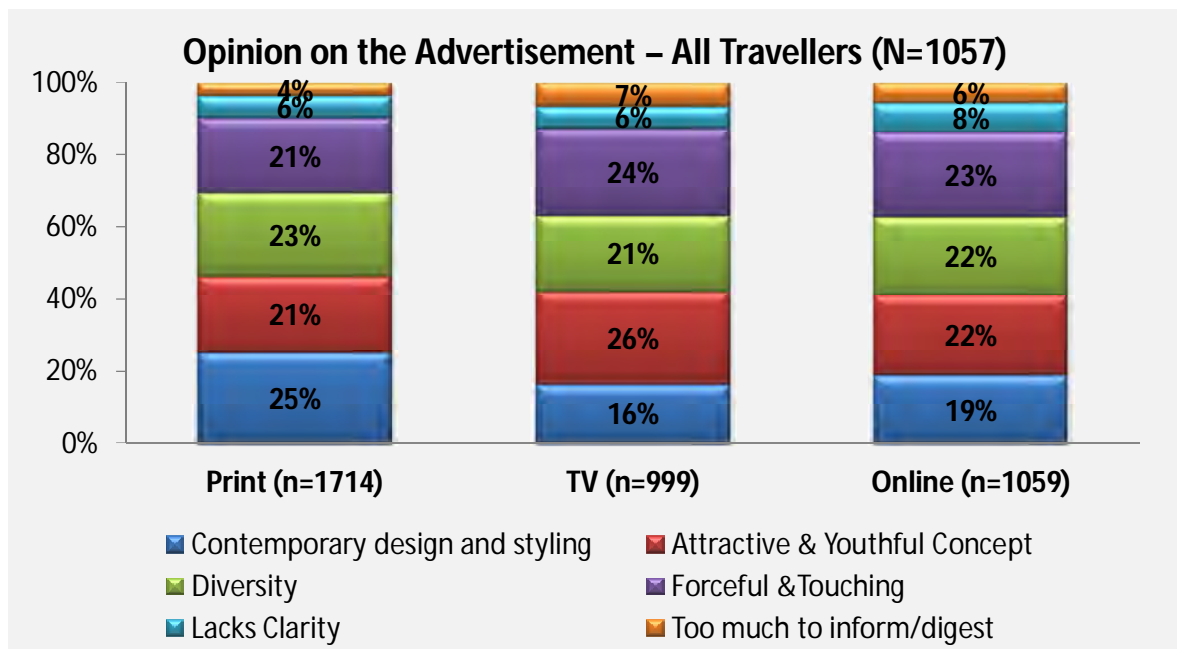
India														
What the Ad is trying to convey	Culture & Heritage		Variety of Foods & Festivals		Hospitality		Developed Rail & Roads		Worth Experiencing		360 Days Destination		Yoga/Spiritualism	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Not at all agree	6	1%	16	3%	4	1%	56	9%	2	0%	18	3%	112	19%
Somewhat disagree	98	16%	58	10%	16	3%	102	17%	11	2%	54	9%	148	25%
Neither agree nor disagree	106	18%	122	20%	108	18%	194	32%	142	24%	162	27%	126	21%
Somewhat agree	144	24%	196	33%	200	33%	136	23%	168	28%	174	29%	154	26%
Very Strongly agree	90	15%	56	9%	76	13%	14	2%	148	25%	80	13%	12	2%
Don't Know	156	26%	152	25%	196	33%	98	16%	129	22%	112	19%	48	8%
<b>Total</b>	<b>600</b>	<b>100%</b>	<b>600</b>	<b>100%</b>	<b>600</b>	<b>100%</b>	<b>600</b>	<b>100%</b>	<b>600</b>	<b>100%</b>	<b>600</b>	<b>100%</b>	<b>600</b>	<b>100%</b>

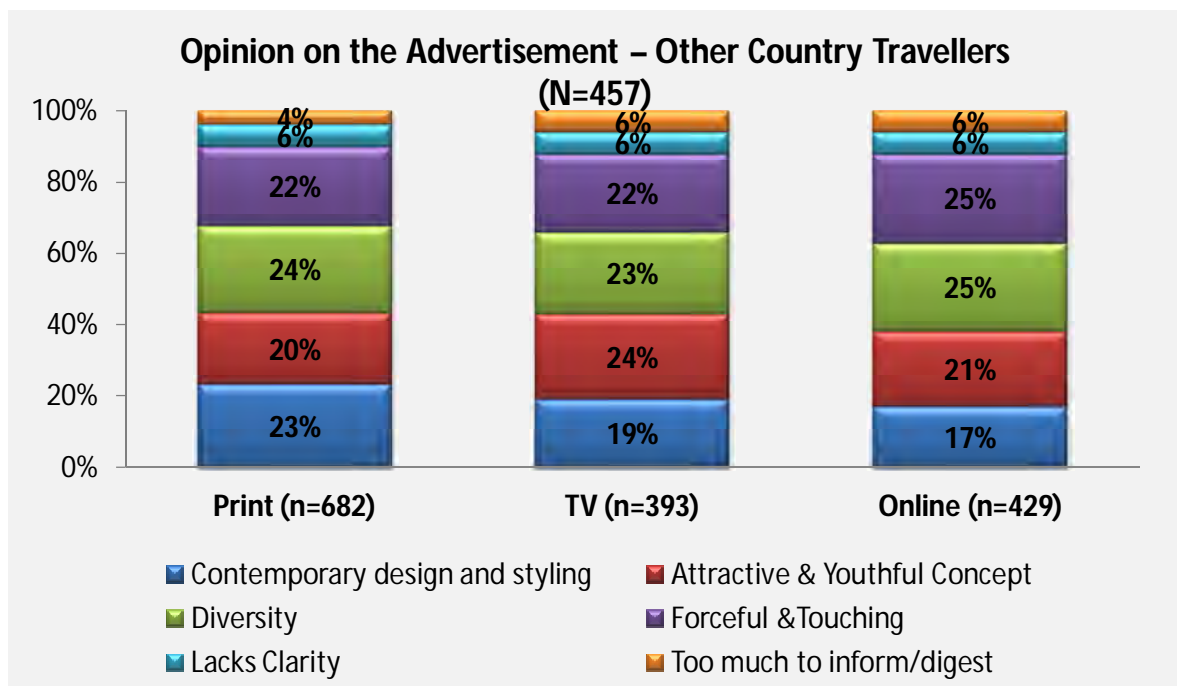
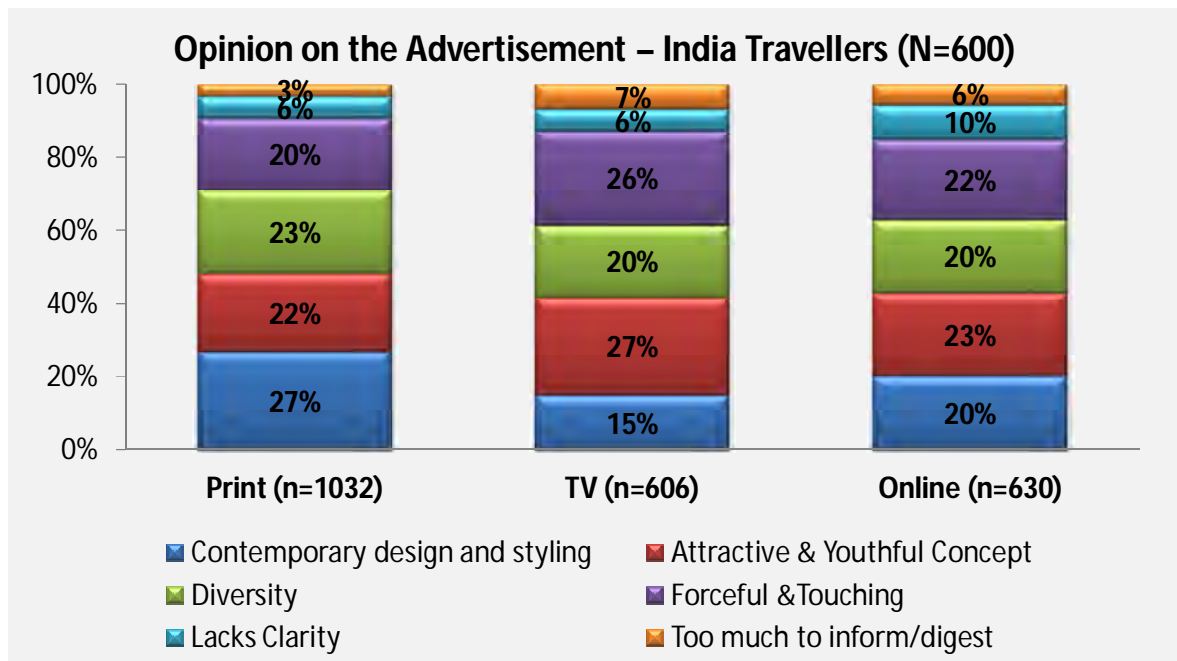
Other														
What the Ad is trying to convey	Culture & Heritage		Variety of Foods & Festivals		Hospitality		Developed Rail & Roads		Worth Experiencing		360 Days Destination		Yoga/Spiritualism	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Not at all agree	8	2%	7	2%	15	3%	37	8%	16	4%	12	3%	108	24%
Somewhat disagree	50	11%	51	11%	52	11%	90	20%	19	4%	50	11%	71	16%
Neither agree nor disagree	78	17%	155	34%	147	32%	164	36%	241	53%	138	30%	106	23%
Somewhat agree	138	30%	94	21%	164	36%	112	25%	139	30%	45	10%	54	12%

Very Strongly agree	31	7%	78	17%	65	14%	24	5%	41	9%	97	21%	44	10%
Don't Know	152	33%	72	16%	14	3%	30	7%	1	0%	115	25%	74	16%
Total	457	100%	457	100%	457	100%	457	100%	457	100%	457	100%	457	100%

### 2.2.3.14 Opinion on the Advertisements

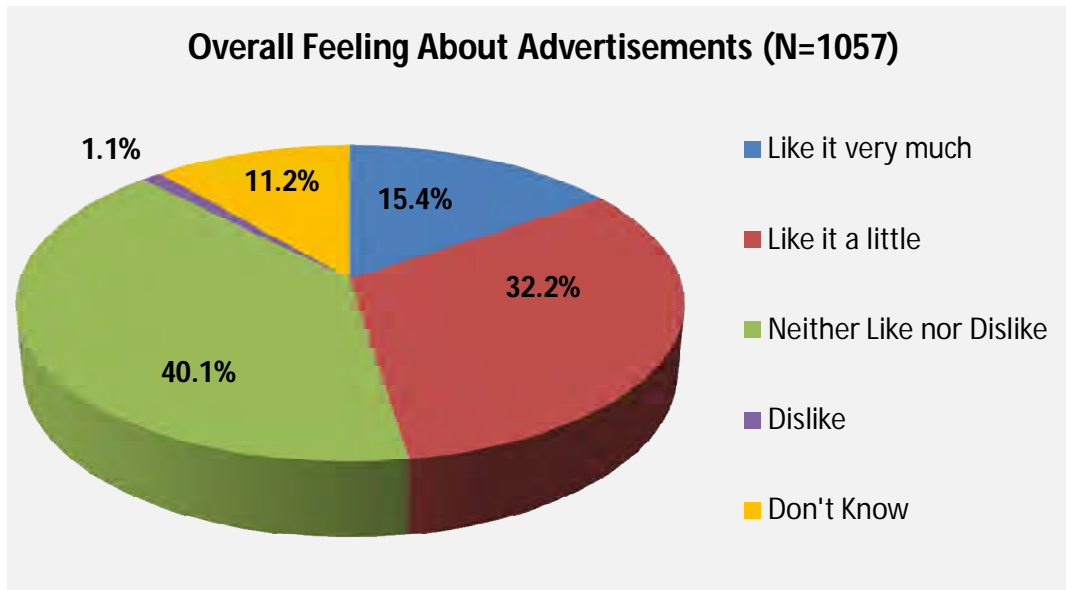
The respondents who viewed the advertisements, irrespective of the medium they viewed it in and irrespective of the country of travel in past, felt that the advertisements had contemporary design & styling, had an attractive & youthful concept, presented the diversity of India and was forceful and touching.





#### 2.2.3.15 Overall Feeling about the Advertisements

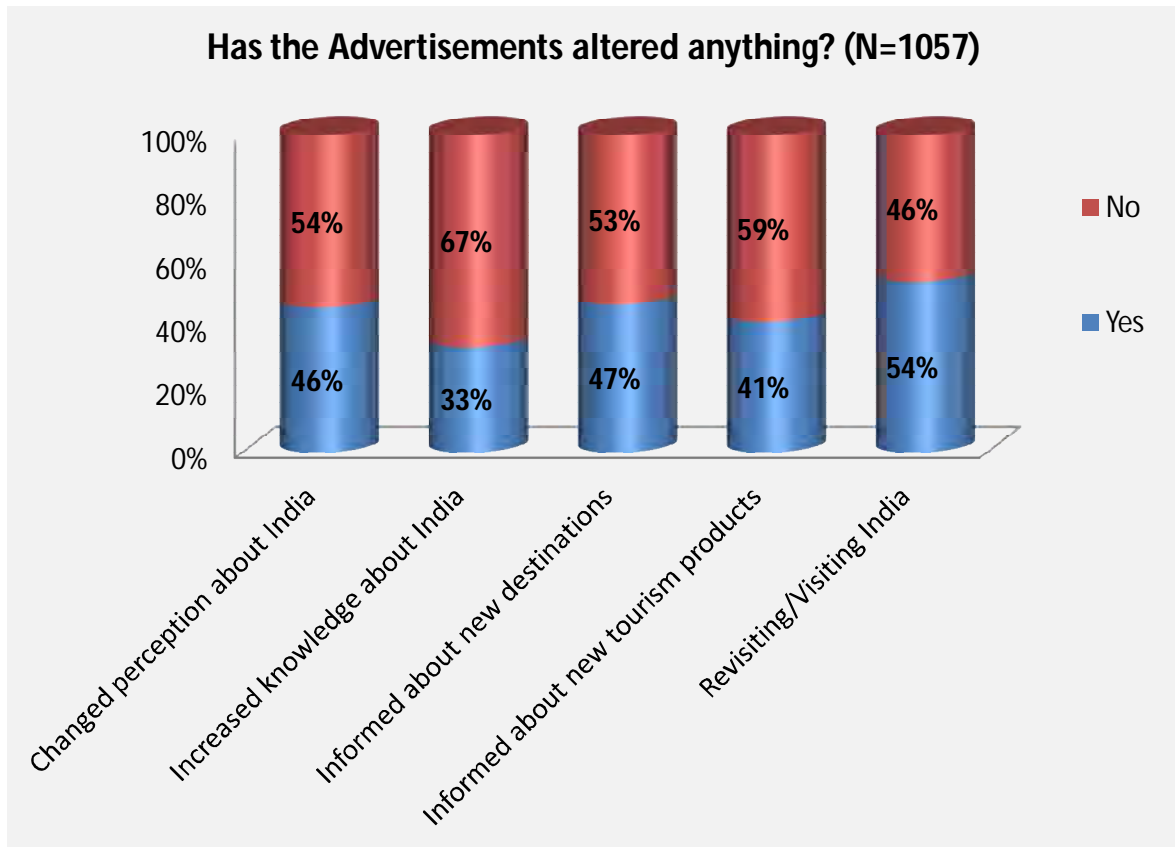
15.4% of the total 1057 respondents mentioned that they liked the advertisements very much, while 32.2% of the total respondents liked it somewhat. More proportion of past travellers to India like the advertisements, than the past travellers to other countries.



Which of these statements best describe your overall feeling about this advertisements of 'Incredible India'?	India		Other	
	Frequency	Percent	Frequency	Percent
Like it very much	102	17.0%	61	13.3%
Like it a little	206	34.3%	134	29.3%
Neither Like nor Dislike	200	33.3%	224	49.0%
Dislike	6	1.0%	6	1.3%
Don't Know	86	14.3%	32	7.0%
<b>Total</b>	<b>600</b>	<b>100.0%</b>	<b>457</b>	<b>100.0%</b>

### 2.2.3.16 Alteration through the Advertisements

Majority of the respondents mentioned that the advertisements has not changed their perception of India, has not increased their knowledge about India, did not inform them about new destinations, did not inform about new tourism products but majority respondents mentioned that the advertisements has made them think about revisiting / visiting India. 54% of the respondents mentioned that the advertisements have not changed their perceptions about India. Majority of the past travellers to India mentioned that the advertisements did not alter their perception about India, whereas for the past travellers to other countries, the advertisements have changed their perception somewhat.



Has the Advertisements Changed Anything?	India						Other					
	Yes		No		Total		Yes		No		Total	
Changed perception about India	222	37%	378	63%	600	100%	261	57%	196	43%	457	100%
Increased knowledge about India	218	36%	382	64%	600	100%	133	29%	324	71%	457	100%
Informed about new destinations of India	274	46%	326	54%	600	100%	220	48%	237	52%	457	100%
Informed about new tourism products in India	236	39%	364	61%	600	100%	198	43%	259	57%	457	100%
Revisiting/Visiting India	338	56%	262	44%	600	100%	232	51%	225	49%	457	100%

## 2.3 Qualitative Traveller Inputs - France

- ✚ The people of France usually travel twice in a year - once a long vacation in summer and a short one during winter /December. During the summer they travel during July /August wherein they largely move with their families outside Europe to USA, Africa / Caribbean, Turkey, Egypt, Asia whereas the short holidays are usually to London, Venice, Spain, Greece, Italy and Mexico. Some travellers from France even go for holidays to South of France towards the west coast while some enjoy skiing holidays with friends.
- ✚ The holidays are well planned in advance - some even plan for their next trip when they return back from the earlier trip but they rely to a great extent on word of mouth (family and friends' recommendation). Besides this, they usually select a destination where some of their friends are residing (other than business travellers).
- ✚ Awareness about India is very less among the French travellers. They still associate India with poverty. They feel that India is too far, expensive and not so safe a destination and they need authentic information.
- ✚ As regards the print advertisements, when showed to the travellers, the first impression they had was that the photography is excellent but there is nothing typical about India which makes one think or awakens their curiosity about India or about the advertisement. The effect of the advertisements, in terms of inquisitiveness about India, is minute on the travellers.
- ✚ There were much better images /pictures already seen by the travellers of the Taj Mahal as well as the Tiger, these particular print advertisements were not at all impressive and they felt that these were not actual images. The sand image looks to be some place in Africa /Sahara, the image of the person in the turban is not to be seen which should have been the focus of the ad. The Palace should have been more depicting the architectural beauty of India, the one shown could be anywhere in London whereas the North eastern image look like a boat in Vietnam, Cambodia etc. None of the image gives a

clear picture that this is India come and experiences. Besides this seeing the same how to go about it, there is no address /website wherein the traveller can connect with.

- ✚ The tag line if not seen , no idea its India, secondly the message /description mentioned on the top of each image is not giving any indication of travelling to India or anything about the location.
- ✚ The images have to be such that they can associate it with India, it should be colourful, show people, traditional dress/saris, festivals, food/dances. Things that identify this is India.

## 2.4 Tour Operators / Travel Agent Inputs – France

- ✚ Some of the operators have India in their portfolio and market India as one of the destinations to high end travellers but the awareness is lacking among the average French Traveller.
- ✚ Except for 2 images, the rest of the images give no idea where are these pictures of, they do not convey that this is India. The images are not lively and there are no people. These are the two characteristics of India in the minds of the French. The images should be speaking of/portraying a destination in the lines of 'Dream holidays -come and experience it'. The French nationals have very less idea about what to see, how long to stay, when it comes to visiting India.
- ✚ Portrayal a destination is important and which is seen on other tourism board's advertisements but not in case of India. What the destination has to offer to travellers should also be merged with the advertisements. For example, what is there for children when they visit India?
- ✚ Brochures /posters are no longer used to promote a destination, 90% of the clients are on the web and it should be highly utilized to promote.
- ✚ A Tour Operator commented "Show the French travellers what they know, try to communicate and remove the fear which they have in mind which is no



longer true - it is not too far, not much jet lag, not so expensive, portray both types of India -modern India, the image needs to be refreshed. The message should be in French”.

- ☞ The video consists of too many images (lack of identification) and is too fast. The video has too much of nature, rather should be showing culture, tradition, festivals, colours, food, temples, beaches, mountains, jungles, etc.
- ☞ The images should be associated with India. For example images of Festivals, Colour, People, Food, Turbans /Saris or something typical about India would be identifiable instantly. The quality of the print images is good but the visibility is very low. The nationals have no idea that India has wild life and adventure that is shown in the images as well as the video.
- ☞ All through the video the Tagline “Incredible India” is not present. Hence the viewers cannot instantly identify the advertisement as India’s. The first 15-20 seconds of the advertisement is not typically representative of India.
- ☞ Consumers before making any travel plan or deciding on any destination for vacation, do their own homework by searching on the net.
- ☞ Awareness about India as a tourist destination is very low. The French nationals do not know what all India has to offer as a tourist destination apart from the Taj Mahal, Rajasthan and Kerala. In the travellers’ minds, doubt /fear to travel to India exists, which needs to be removed.
- ☞ The French still associate India with poverty, crowded, unsafe, dirty, beggars. They have minimal idea that India has transformed over the years as there is no communication regarding the same.
- ☞ Ministry of Tourism, Government of India should advertise in local magazines (IN French) and local French channels. Aversion to English as language is prevalent in France; hence, communication in French is essential

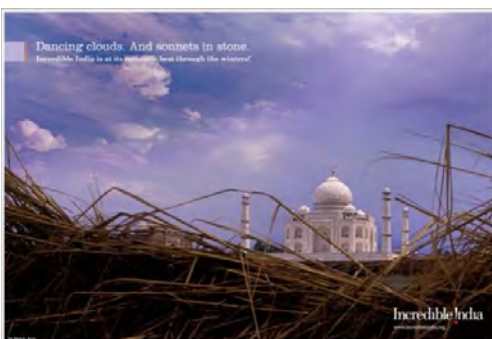
## Print Advertisements



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](http://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 black and white background of the image results in portraying a dark impression and the image cannot be connected to that of India as India is colourful and vibrant in the minds of the viewers of the geographies of study. If the “Incredible India” tagline was not present in the advertisement, the advertisement would have looked like that of an advertisement for Africa or Canada. The website ([www.incredibleindia.org](http://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.



This advertisement was one of the most watched advertisements in the countries of USA, France and Australia. The presence of the Taj Mahal makes this image irrefutably as of India's. There were mixed reactions to image. Most viewers felt that the beauty of the Taj has been eclipsed by the hay in front and that there are several beautiful pictures of 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](http://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](http://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](http://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](http://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**

#### ***France:***

- The images do not convey India in the minds of the viewer. The viewers are of the opinion that the shots & photography is excellent but the images are not lively and hence do not depict India. The print images do not convey any message to come and visit India. The images should be associated with India. For

example images of Festivals, Color, People, Food, Turbans /Saris or something typical about India would be identifiable instantly.

- The message and the tag line in the print images, as well as the video footage, should be in local language - French.
- The website address is not legible due to the small font.
- Respondents think India is very far. Communication on proximity of India is not present and is essential for changing the mindset.
- Quality of TV commercial is good but the duration is too long.
- The nationals have no idea that India has wild life and adventure that is shown in the images as well as the video.
- Consumers before making any travel plan or deciding on any destination for vacation, do their own homework by searching on the net. 90% of the travelers have web access.
- Awareness about India as a tourist destination is very low. The French nationals do not know what all India has to offer as a tourist destination apart from the Taj Mahal, Rajasthan and Kerala. In the travelers' minds, doubt /fear to travel to India exists, which needs to be removed. The French still associate India with poverty, crowded, unsafe, dirty, beggars. They have minimal idea that India has transformed over the years as there is no communication regarding the same.
- Ministry of Tourism, Government of India should advertise in local magazines (IN French) and local French channels. Aversion to English as language is prevalent in France; hence, communication in French is essential.

## CHAPTER THREE PHASE -II

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.

### 3.1 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	
France	954	954

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

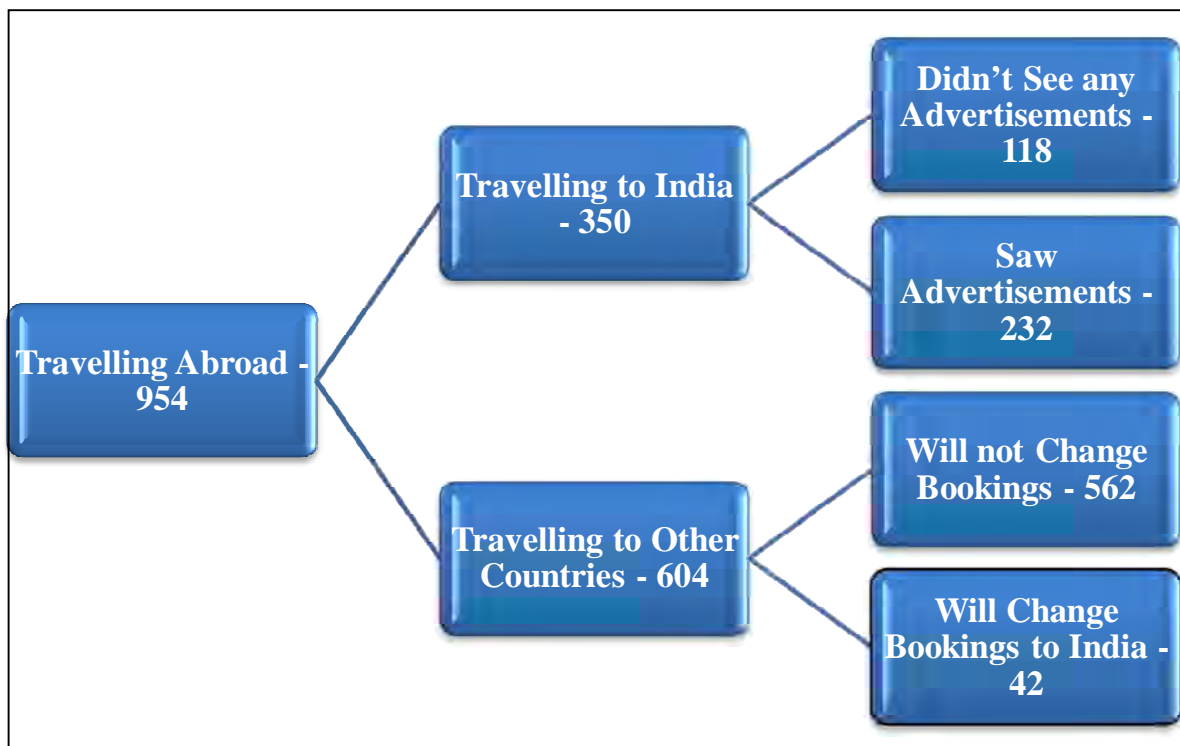
	FRANCE
Completed Sample / Interviews	954
Targeted Respondents for Achieving Sample	9902
Incidence / Hit Rate	10%



### 3.2 Primary Survey Findings - France

#### **Distribution and Demography of Travelers**

The primary survey was carried out among a total of **954 travelers** who were traveling abroad were interviewed in France. Of the total number of respondents 954 interviewed, 350 (37%) respondents have decided to visit India in the next one year and the remaining 604 were travelers who have decided to visit countries other than India in the next one year. Out of 350 respondents travelling to India 118 respondents are travelling to India without watching the advertisements.



*Figure 3.1:* Distribution of Respondents

#### *i. Distribution of Travellers by City of Residence*

Majority of respondents were interviewed in Paris 52%, followed by 28% travellers in Lyon. The rest 20% of travellers belonged to other cities.

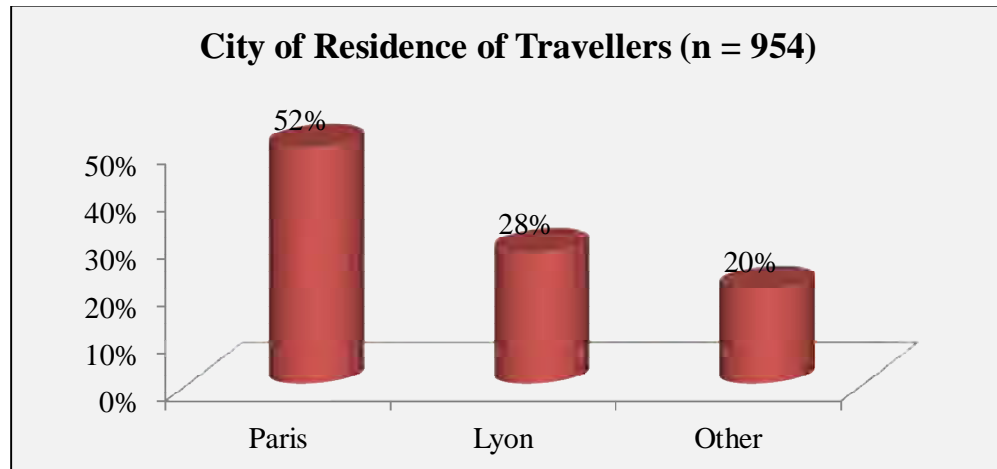


Figure 3.2: City of Residence of Respondents

ii. **Age Distribution of Travellers**

A quarter of travellers belong to the age group of 36 to 50 years (25% of total 954 travellers surveyed in France). Only 11% travellers interviewed were above 18 to 25 years of age. Amongst the other age groups, a fair distribution of future travellers can be observed. 55% of the travellers were males and 45% of the travellers were females.

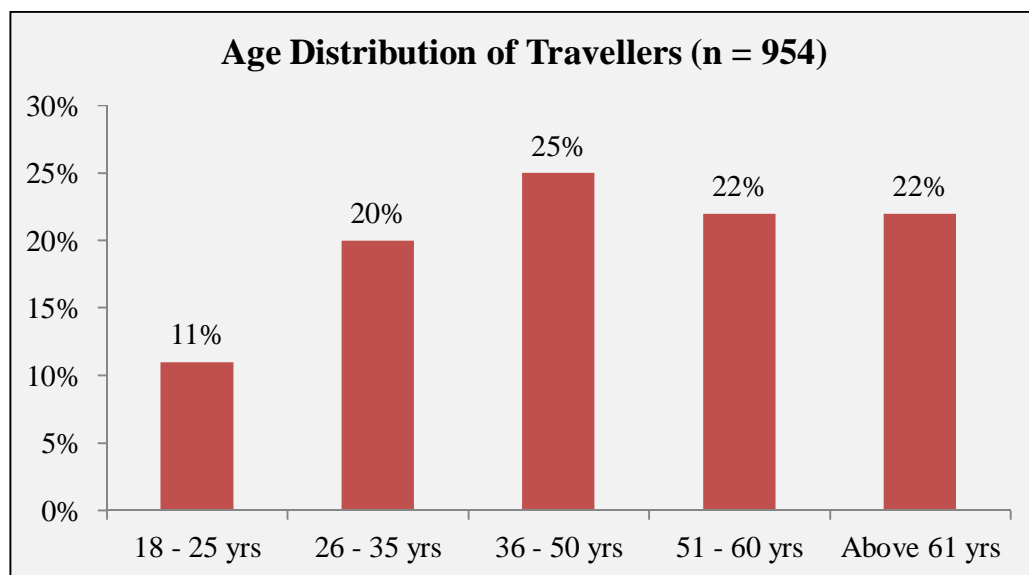
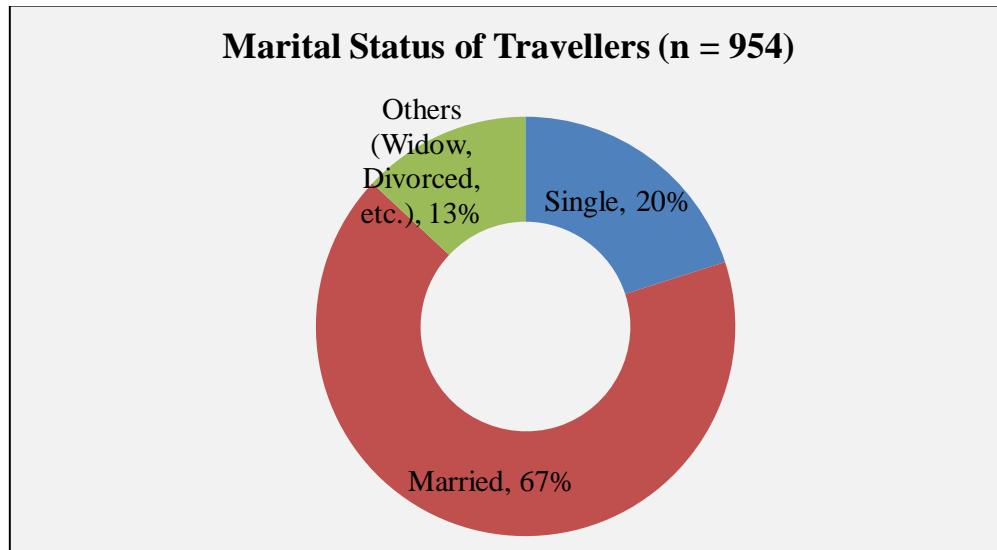


Figure 3.3: Age Distribution of Travelers

iii. **Marital Status of Travellers**

Majority of travellers, 67% out of 954 surveyed respondents, were married, whereas, 20% of the total respondents were single and the rest 13% were either divorced, separated, widowed etc. 55% of the travellers were males and 45% of the travellers were females.



*Figure 3.4: Marital Status of Travelers*

### **3.2.2 Advertisement Viewing Particulars**

#### **3.2.2.1 *Viewership of Any "Incredible India" Campaign***

87% (836) of the total 954 respondents said that they have seen "Incredible India" campaigns in the past in France. 12% (118) mentioned that they have not viewed any of the "Incredible India" advertisement campaign in the past. Out of the 4 print advertisements and 1 video advertisement, the most viewed advertisement was the desert advertisement (23%). The second most viewed advertisement was the video (22%) closely followed by the "History Sleeps" print advertisement (22%). The least viewed advertisement was the print advertisement featuring stags in Corbett National Park (15%).



Figure 3.5: Viewership of Ads by Travellers (n = 836)

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

Majority of respondents 36% of 836 respondents mentioned that they last viewed the advertisements of this campaign a month back while 23% of travellers had viewed the campaigns more than a month back.

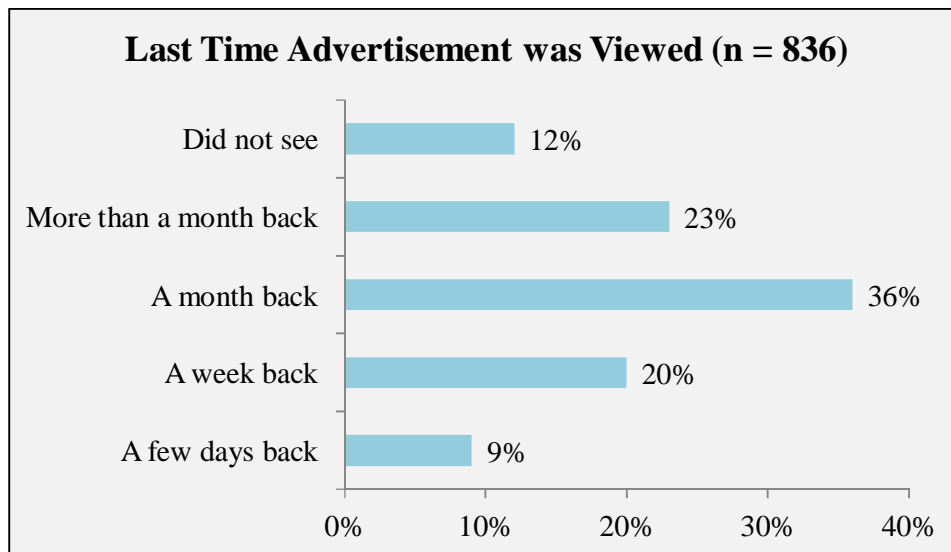
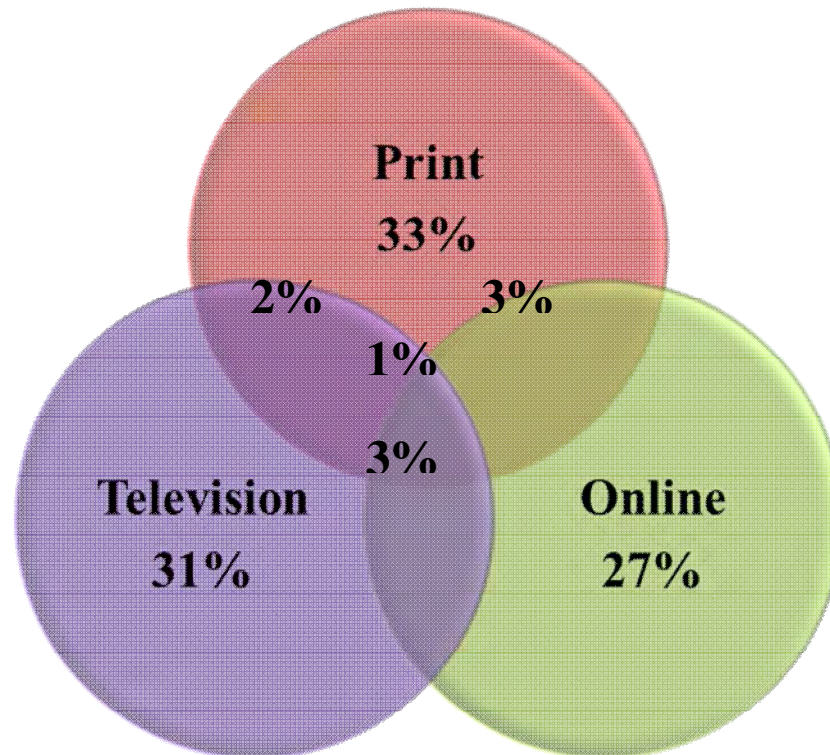


Figure 3.6: Figure 3.5: Time when Advertisement was Last Viewed

### 3.2.2.3 *Advertisement Viewing Medium*

Of the total respondents interviews 33% of the total 836 respondents saw the advertisements in the print media only. Only one percent of respondents saw the advertisements in all the three mediums of print, television and online. 27% of the total 836 respondents said that they saw the advertisements only online and 31% only on television.

#### **Advertisement Viewing Medium – All Travelers (n = 836)**

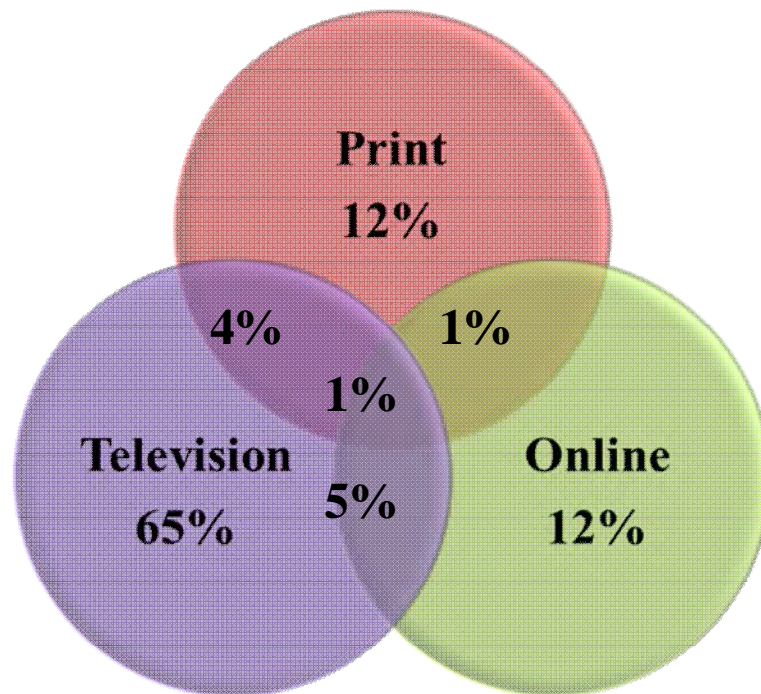


*Figure 3.7: Medium of Viewership*

### 3.2.2.4 *Most Effective Viewing Medium*

In France respondents said television only (65% of 954 respondents), followed by online media only (12% of 954 respondents) are the most effective mediums of advertisement.

**Most Effective Advertisement Medium – All Travelers (n = 954)**



**Figure 3.8:** Most Effective Viewing Medium

**3.2.2.5 Television Channel in which Advertisement was Viewed**

In France, Euro News (23%, 130 views) followed by CNN (17.9%, 103 views) and Discovery (16.2%, 93 views), were the channels where the video advertisement was most viewed. Sky News was the channel where the video advertisement was least viewed with 3.3% (19 views) reporting viewership for the channel.

Television Channels	Frequency	Percentage
CNN	103	17.9
BBC	75	13.0
Travel Channel	54	9.4
Discovery	93	16.2
CNBC	28	4.9
Sky News	19	3.3
Euro News	130	22.6
Euro Sports	73	12.7
<b>Total</b>	<b>575</b>	<b>100</b>

**Source:** Nielsen Primary Survey

**Table 3.1:** Television Channels airing Ads

### 3.2.2.6 **Print Media where Advertisement was Viewed**

Amongst Global and French print media the advertisements were viewed most in La Nouvel Observateur magazine (23.5%, 243 views) by respondents. The second highest viewership of print advertisements was in Elle magazine with 20.2% (208 views). The least views of print ads were reported from Conference + Meetings World Magazine and Financial Times Worldwide Special Reports (both with 0 views).

Print Media	Frequency	Percentage
Harvard Business Review	10	1.0
International Herald Tribune	9	0.9
Conference + Meetings World Magazine	0	0.0
Wall Street Journal Magazine Global	28	2.7
The Economist	48	4.6
Financial Times Worldwide special reports	0	0.0
How To Spend It	19	1.8
Global Traveler	55	5.3
Associations & Meeting International	10	1.0
Grand Reportage	170	16.5
Elle	208	20.2
Le Nouvel Observateur	243	23.5
Serie Limitee	9	0.9
Air France In-flight Magazine	195	18.9
Delta Sky (In-flight Magazine of Delta Airlines)	28	2.7
<b>Total</b>	<b>1032</b>	<b>100</b>

**Source:** Nielsen Primary Survey

**Table 3.2:** Print Media Ads Viewership

### 3.2.2.7 **Online Media where the Advertisements was Viewed**

You Tube (29.2%, 315 views), followed by Facebook (24%, 259 views) were the websites where the advertisements were most viewed. CNBC.com and CondeNast Traveller had least views 2.5% and 1.8% respectively as reported by respondents.

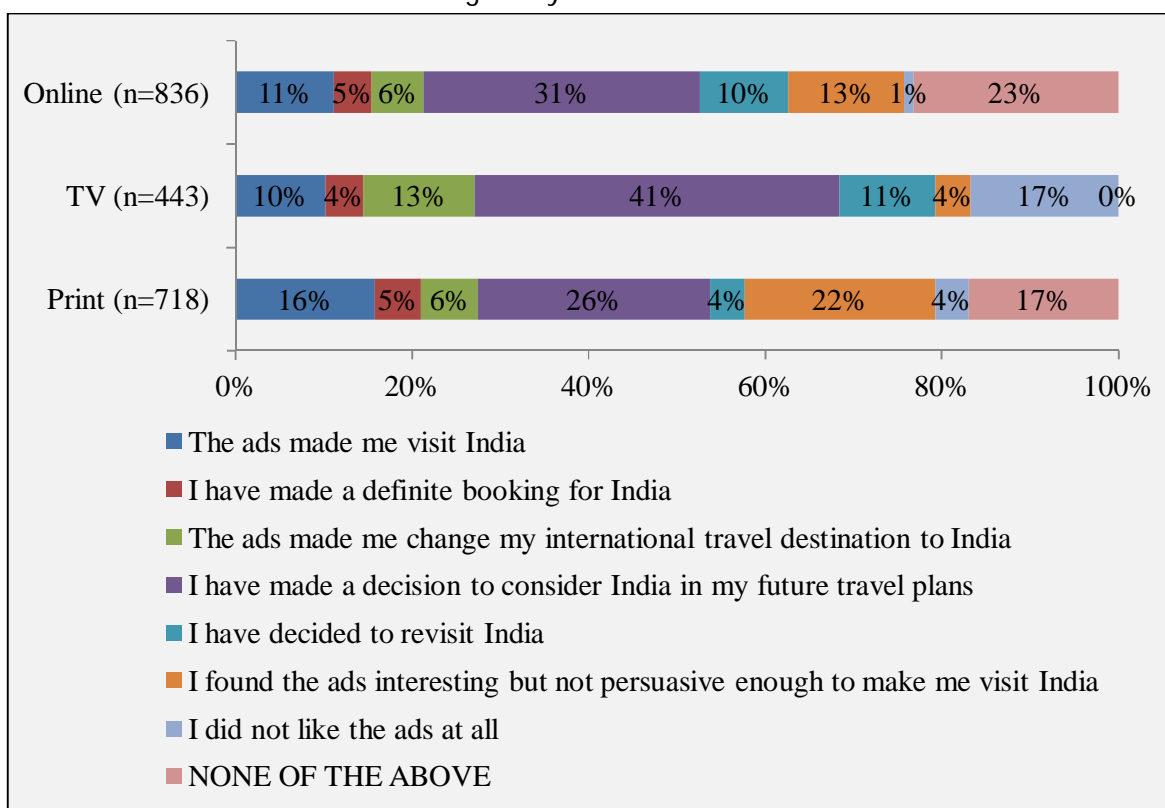
Online Media	Frequency	Percentage
BBC.com	47	4.4
Eurosports.com	113	10.5
CNBC.com	27	2.5
LinkedIn	47	4.4
Facebook	259	24.0
CondeNast Traveler	19	1.8
Trip Advisor	113	10.5
Yahoo	138	12.8
You Tube	315	29.2
<b>Total</b>	<b>1078</b>	<b>100</b>

*Source:* Nielsen Primary Survey

**Table 3.3:** Online Ads Viewership

### 3.2.2.8 **Impact of Advertisements on Decision Making of Travellers**

The immediate impacts of the advertisements have been positive where in 11%, 10% & 16% (in online, television and print Medias respectively) of respondents said the ads made them visit India. Respondents who viewed the advertisements in the print medium (26% of 718 respondents) said they have made a decision to consider India in their future travel plans after viewing the advertisement. Respondents (41% of 443 respondents) who watched the advertisements on television and 31% of 836 respondents viewing the online medium said they too have made a decision to consider India in their future travel plans). Of the total respondent viewership in online, television and print formats **6%, 13% and 6%** of respondents said the ads made them **change their travel destinations** to India in the coming one year.

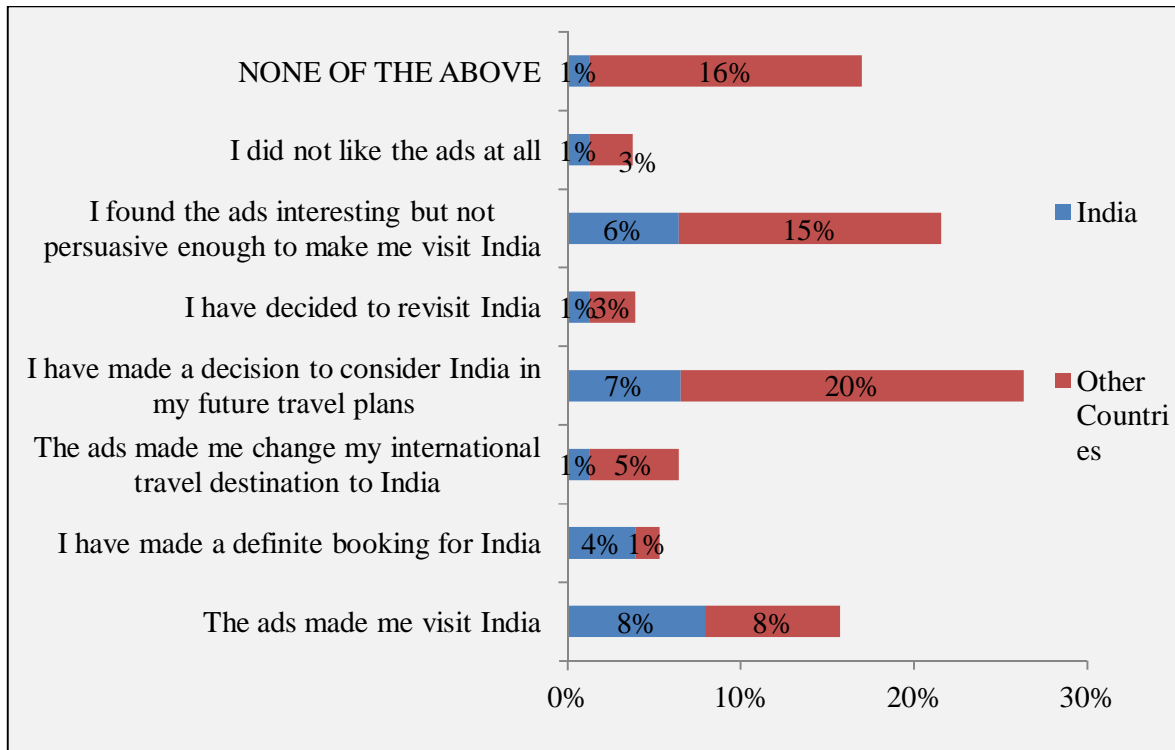


**Figure 3.9:** Impact of Advertisements on Decision-making of Travellers

#### i. **Impact of Advertisements in Print Media on Travellers Decisions**

5% of all travellers said the Incredible India ads made them change their minds and their present travel destinations. 20% of the total 718 respondents who had viewed print advertisements said that they are planning to travel to other countries in the next one year and the advertisements have made them consider India as a future travel destination.





**Figure 3.10:** Impact of Print Media on Travellers Decisions

**ii. Impact of Advertisements on Television on Travellers Decisions**

Of the total viewers of ads on television (443) 13% of respondents said that the ads made them change their international travel destination to India, while 33% of the total respondents, who viewed the video advertisement on television, said the advertisements have made them consider India as a future travel destination, although this coming year they will be travelling to other countries.

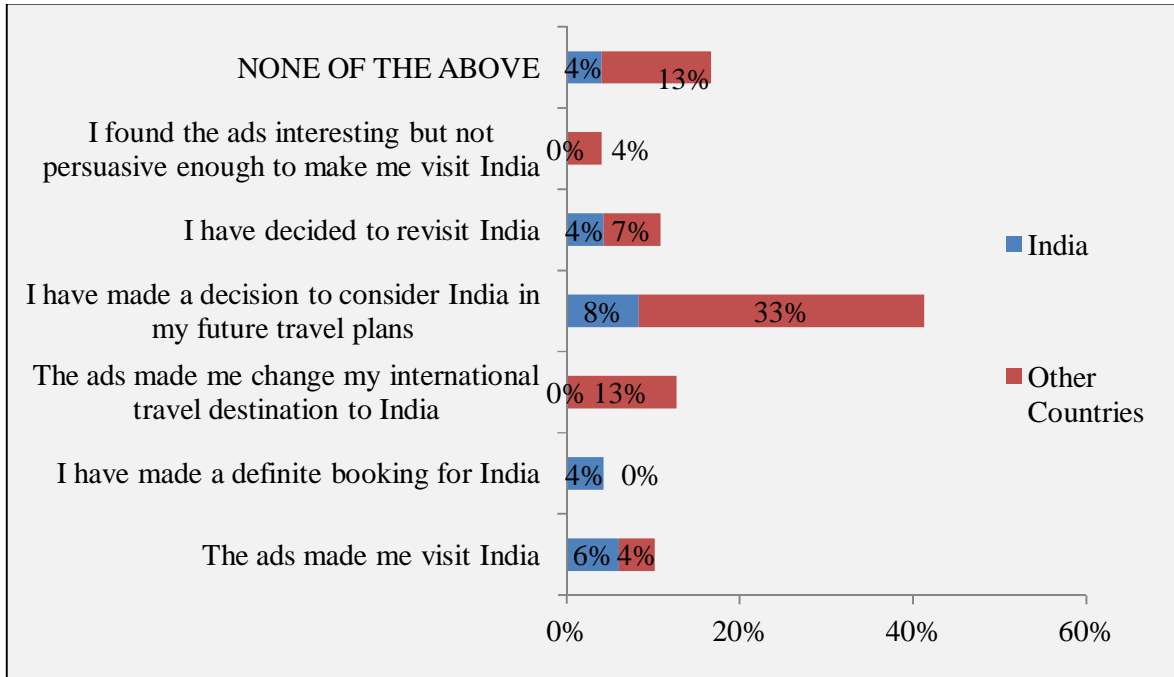


Figure 3.11: Impact of Television on Travellers Decisions

**iii. Impact of Advertisements in the Online Media on Travellers Decisions**

22% of total 836 respondents who viewed the advertisements in the online media are slated to travel to other countries in the next 1 year and mentioned that after viewing the advertisements they will be considering India as travel destination in the future.

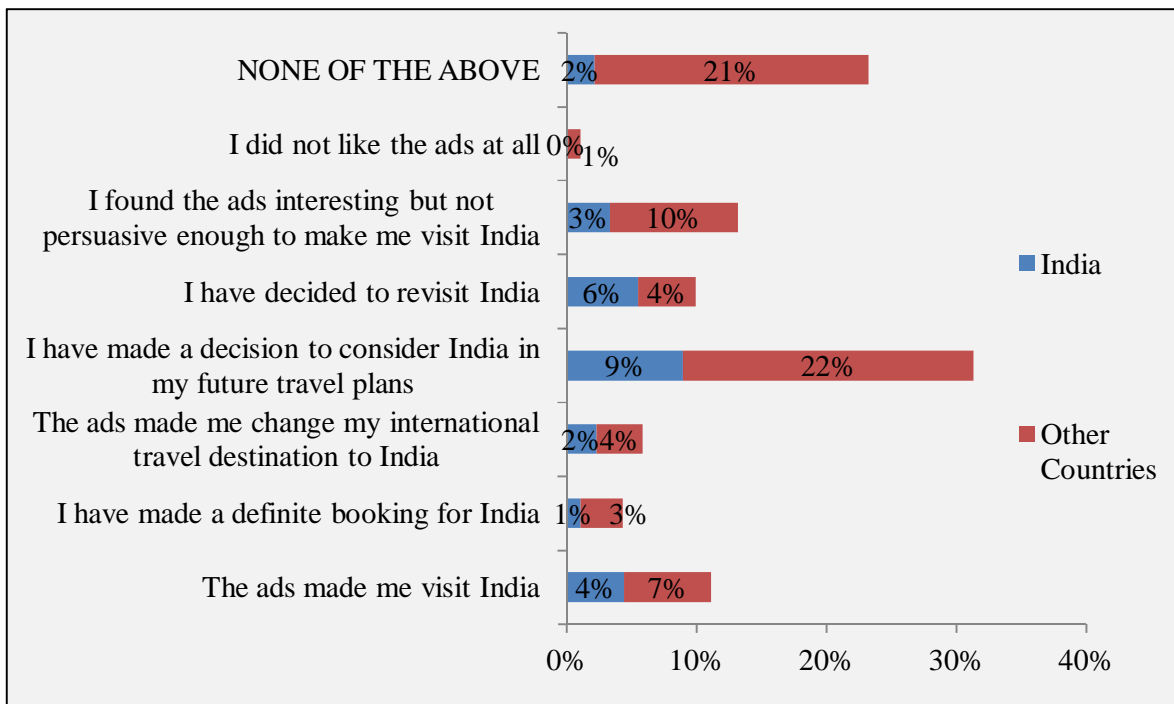
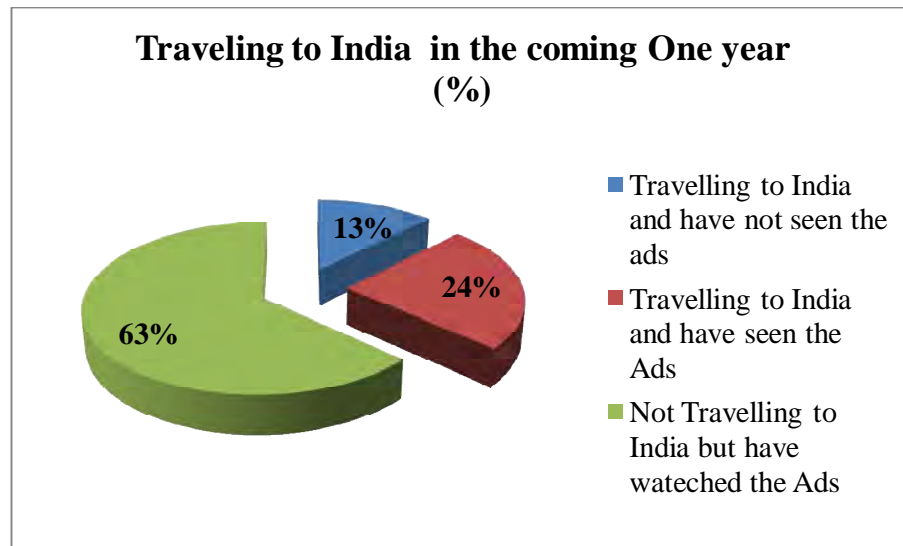


Figure 3.12: Impact of Online Media on Travellers Decisions

### 3.2.3 Future Travel Particulars

#### 3.2.3.1 *Country of Future Travel*

37% of the total 954 respondents interviewed have said that they have already made definite plans to visit India in the next one year. The rest 63% of the 954 respondents interviewed, mentioned that they are travelling to other countries within the next one year. 24% of travelers had decided to visit India after watching the advertisements in any of the three formats while 13% of travelers are visiting India without watching any of the advertisements.



*Figure 3.13: Impact of Advertisements and Travel Patterns*

Other Countries of Travel	Frequency	Percentage
South Africa	32	3.4
America Asia	28	2.9
Central America	12	1.3
South America	13	1.4
Latin America	17	1.8
Angleterre, USA, Allemagne, Spain	7	0.7
Australia	29	3.0
Berlin	12	1.3
Berlin, Budapest, Italy, India South Asia, Japan	9	0.9
Mumbai	26	2.7
Brazil, India, Japan	9	0.9
Cambodia	8	0.8
Canada	57	6.0
Canada, Spain	10	1.0

<b>Canada, Thailand, USA</b>	12	1.3
<b>CANADA GREECE</b>	14	1.5
<b>India</b>	108	11.3
<b>China, Canada, USA</b>	15	1.6
<b>Croatia</b>	18	1.9
<b>Croatia, Egypt</b>	9	0.9
<b>Delhi</b>	31	3.2
<b>Egypt</b>	9	0.9
<b>Spain, Seychelles, India</b>	9	0.9
<b>Ethiopia USA Madagascar</b>	10	1.0
<b>Europe</b>	15	1.6
<b>Gabon</b>	9	0.9
<b>Greece</b>	19	2.0
<b>Africa</b>	20	2.1
<b>Mauritius</b>	10	1.0
<b>India, Canada, Spain</b>	12	1.3
<b>India Thailand</b>	11	1.2
<b>India, Africa</b>	9	0.9
<b>India, Australia, Patagonia</b>	10	1.0
<b>India, China</b>	8	0.8
<b>India, Latin America</b>	7	0.7
<b>India Pakistan Bangladesh</b>	3	0.3
<b>India Pakistan</b>	8	0.8
<b>India, Australia</b>	19	2.0
<b>India, Cambodia, Morocco Namibia</b>	18	1.9
<b>India, USA</b>	15	1.6
<b>Israel</b>	9	0.9
<b>Japan</b>	18	1.9
<b>Kirghizstan</b>	9	0.9
<b>India, South America</b>	9	0.9
<b>Australia, Bahamas, Amazon</b>	10	1.0
<b>Norway, Ireland, Thailand</b>	12	1.3
<b>Thailand India, Jordan Dubai</b>	18	1.9
<b>Rajasthan</b>	18	1.9
<b>Vietnam</b>	9	0.9
<b>Malaysia</b>	15	1.6
<b>Malta</b>	9	0.9
<b>Morocco</b>	11	1.2
<b>Mediterranean Country</b>	9	0.9
<b>Mexico</b>	17	1.8
<b>NEW DELHI</b>	10	1.0

<b>Peru</b>	7	0.7
<b>India, Peru</b>	10	1.0
<b>Tunisia</b>	10	1.0
<b>Turkey</b>	12	1.3
<b>USA</b>	35	3.7
<b>Total</b>	<b>954</b>	<b>100</b>

*Source:* Nielsen Primary Survey

**Table 3.4:** Future Travel Destinations

### 3.2.3.2 *Reasons for Travelling to Other Countries*

24% of the total 954 respondents said they loved the advertisements of the destinations and hence chose to travel there. The second reason for choosing the destination was that the tourism products of the destination are very attractive.

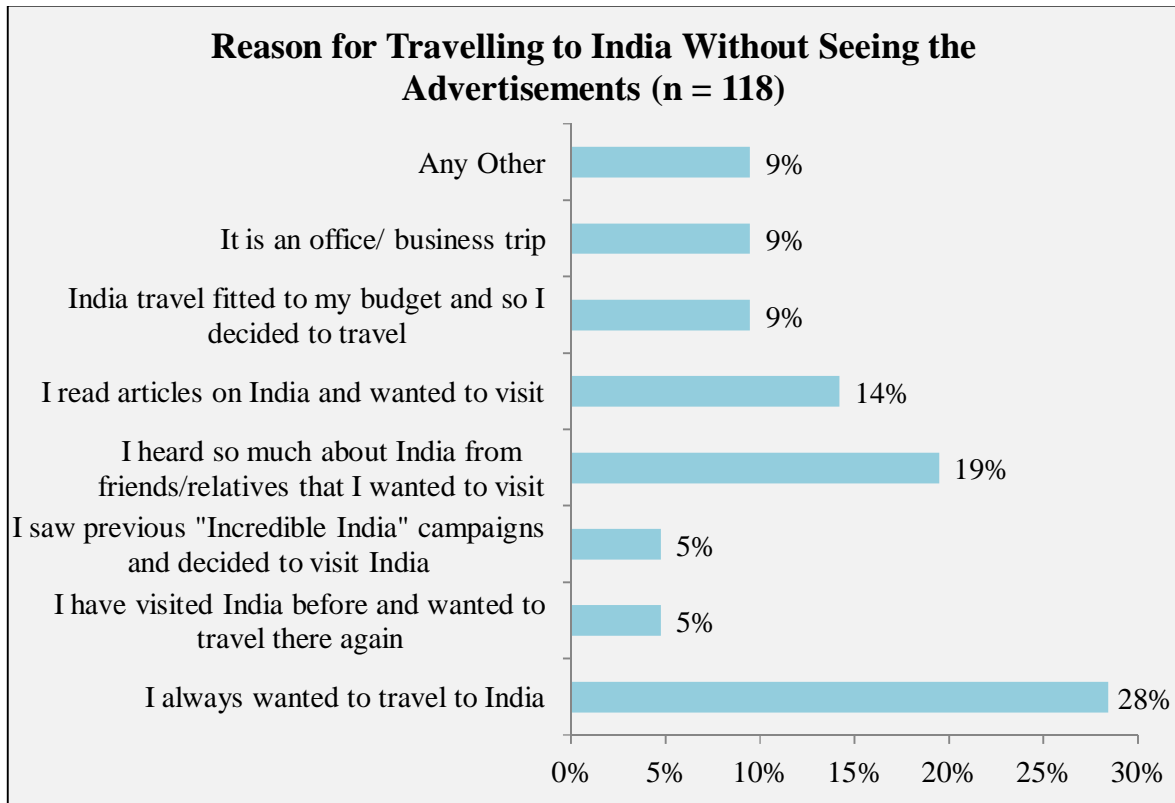
<b>Reason for Visiting</b>	<b>Frequency</b>	<b>Percentage</b>
<b>I saw and loved the advertisements of this destinations</b>	224	23.5
<b>I have friends / relatives there</b>	101	10.6
<b>It is an Office/ business trip</b>	9	.9
<b>The tourism products there is very attractive</b>	185	19.4
<b>The destination fits my budget</b>	177	18.6
<b>Visa is not required</b>	19	2.0
<b>The destination has tourism products suitable for my family</b>	83	8.7
<b>Any other</b>	156	16.4
<b>Total</b>	<b>954</b>	<b>100.0</b>

*Source:* Nielsen Primary Survey

**Table 3.5:** Reasons for Travelling to Other Countries

### 3.2.3.3 *Travelling to India -Without Viewing any of the Advertisements*

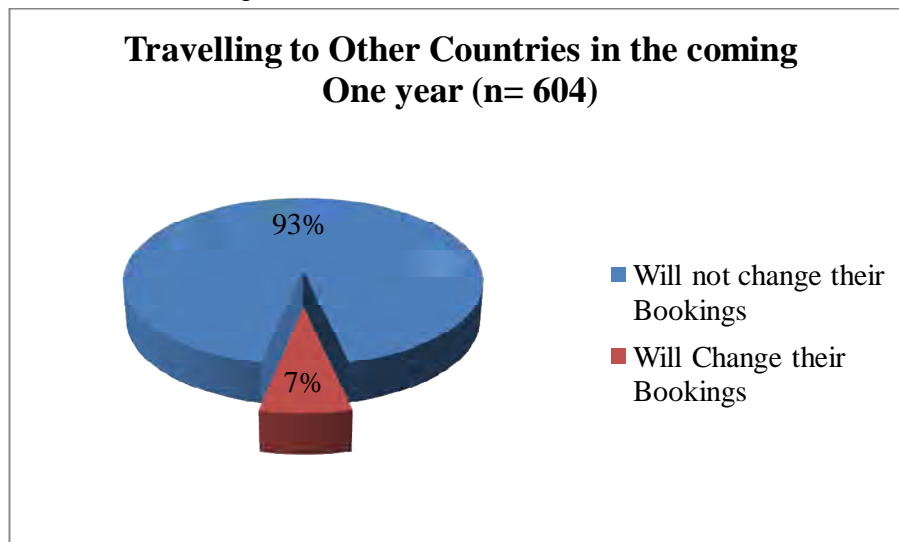
118 (13%) respondents out of the total 954 respondents interviewed in France, had already decided to travel to India, without having seen the chosen set of advertisements being tested. 28% of 118 respondents said their primary reason for visiting India, without the aid of the current advertisements is that they had always wanted to travel to India. The second reason (19% respondents of 118) for visiting India without having seen the advertisements is that the respondents have heard many things about India from their friends and relatives hence they decided to travel to India.



**Figure 3.14:** Reason for Travelling to India without viewing the ads

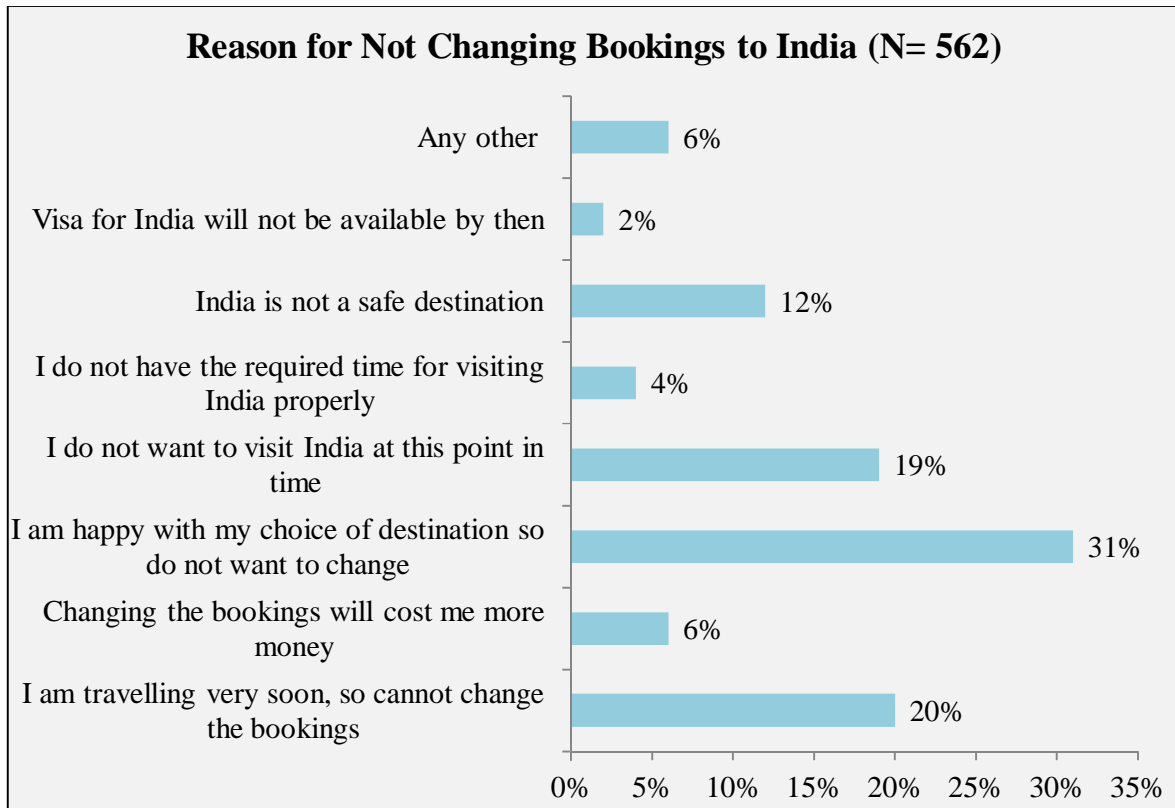
### 3.2.3.4 Travellers to Other Countries

Out of 604 travellers, who had made definite booking for travelling to other countries in the next one year, 7% (of 604) said they have decided to change their bookings for India after seeing the advertisements. 93% respondents mentioned that they won't change their current bookings in favour of India.

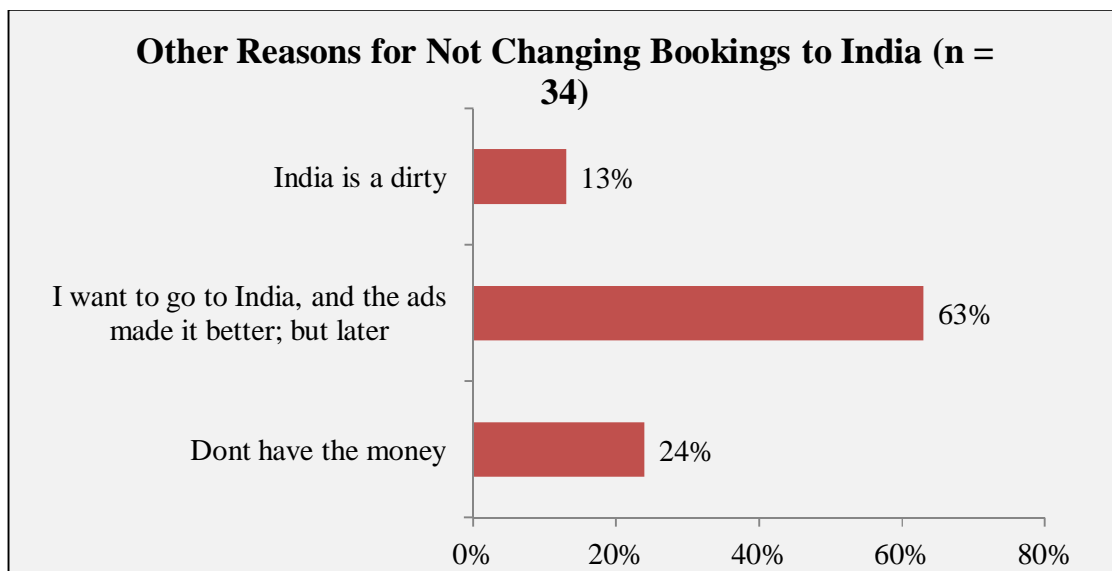


**Figure 3.15:** Impact on Travellers to Other Countries

The primary reason for travellers not to change their bookings were they are happy with the destination and do not want to change (31%), they are travelling soon, therefore cannot change their travel plans and bookings (20%). Other reasons cited for not changing bookings by respondents (63%) is that India is on their list of must see destinations but only after their present visits are made.

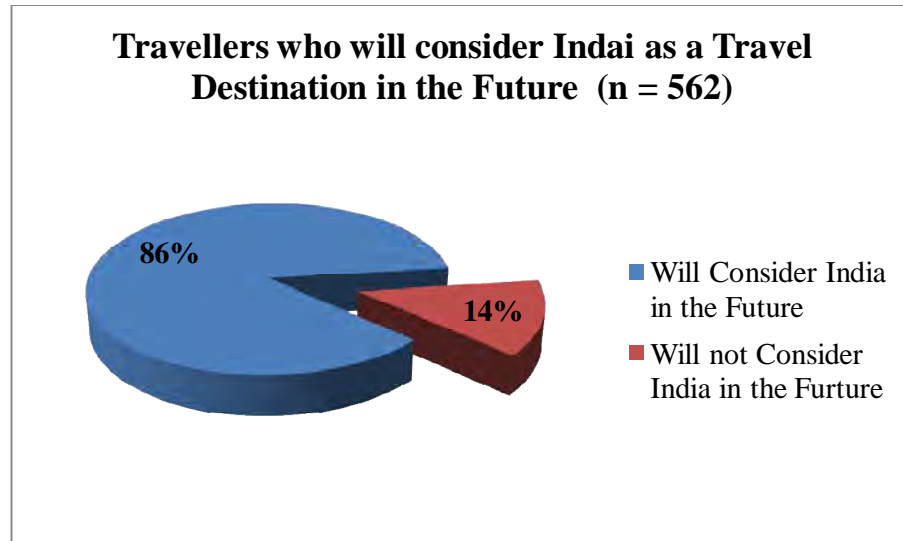


**Figure 3.16:** Reasons for not changing Travel Bookings to India



**Figure 3.17:** Other Reasons for not Changing Travel Bookings

Out of total respondents travelling to other countries and who are not going to change their bookings in favour of visiting India, 86% mentioned that they will consider visiting India for their future travel plans.



**Figure 3.18:** Travellers who will consider India in the Future

### 3.3 Conclusion - Impact of Media Campaigns on Travellers in France

The interviews and questionnaires have pointed out to a positive influence of the Incredible India campaigns over respondents. A total of 954 travellers were interviewed in France, of which 37% are travelling to India in the coming one year, while 12% of respondents have decided to travel to India without watching any of the advertisements. Some of the identifiable impacts of campaigns from the survey are given below:

- There is a gradual but sure impression of the *Incredible India* campaigns which have resulted in 24% of respondents saying they are travelling to India after watching the advertisements, while 6%, 13% and 6% of respondents travelling to other countries in online (836) television (443) and print (718) formats to change their travel destinations to India in the coming one year after watching the ads. On the whole, 4% of total respondents (954) have decided to change their travel bookings to India after watching the Incredible India advertisements.
- Of the same number of respondents, **22%, 33% and 20%** of respondents in online, television and print Medias respectively, have made a **decision to consider India in their future travel plans**. On the whole, **86%** of travellers have decided to consider India as a future travel destination after watching the advertisements.



- Some of the reasons cited for not travelling to India where, 23% (out of 954) respondents said they loved the advertisements of their present travel destinations, secondly, the tourism products seemed attractive (19.4%).
- India as a destination is appealing to tourists with 13% of tourists travelling to India without watching any of the advertisements.
- Print media was the most viewed media at 33% people having viewed the ads on television, followed by television (31%) and online (27%) mediums.
- Paris is the key port of exit and maximum number of respondents (53%) residing in the city.
- India according to respondents is a favoured destination since it highly appreciated by friends and relatives who have been to the country. Thus, the word of mouth propaganda has helped create a positive image for India. At the same time, in the course of discussions respondents said they had to visit the Americas as they had friends and relatives in the country.
- According to respondents there is a general lack of information and discussion on India other than the *Incredible India* campaigns and activities undertaken by the India tourism offices. The Indian culture, food and textile as well as Indian cinema i.e. Bollywood garner a lot of interest among the French people.

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## CHAPTER FOUR CONCLUSION & RECOMMENDATIONS

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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 2000-2010<sup>4</sup>) tourist travel. The campaigns thus, should also target prospective growth markets in addition to traditional source markets of Europe and America.

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<sup>4</sup> China Outbound Tourism, HVS Global Hospitality Services, 2011