

Assessment of International Media Campaigns of the Ministry of Tourism for United States

Final Report

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Market Research
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Government of India



सत्यमेव जयते
Government of India

ACNielsen ORG-MARG Private Limited

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Executive Summary

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

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

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

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

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

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

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

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CHAPTER ONE INTRODUCTION & METHODOLOGY

1.1 Background of the Study

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

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

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

¹UNWTO Barometer Vol 10, January 2012

²UNWTO Barometer Vol 10, September 2012,

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

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

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

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

Phase I of the study focussed on assessing the reach, quality, effectiveness and perception of people 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 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.

1.2 Terms of Reference

The scope of the study as per the Term of Reference 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

- ii. 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?

B. Interaction with the Tour Operators:

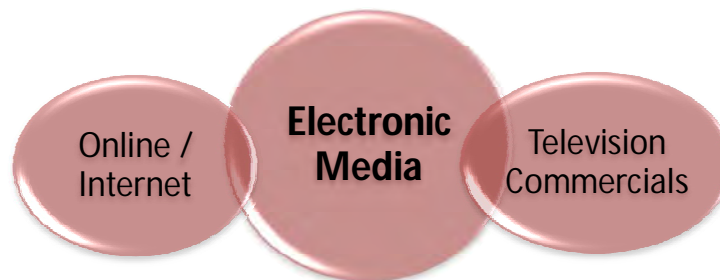
To coincide with phase I, to have an idea about the following:

- 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.

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.

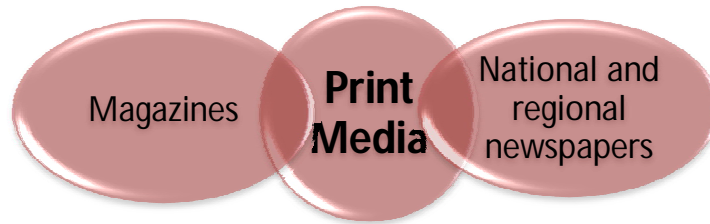
The Foreign Nationals and Outbound / International Tour Operators who are viewers of electronic media and readers of print media were interviewed for the study. Electronic Media consisted of:



Online / Internet - advertisements in

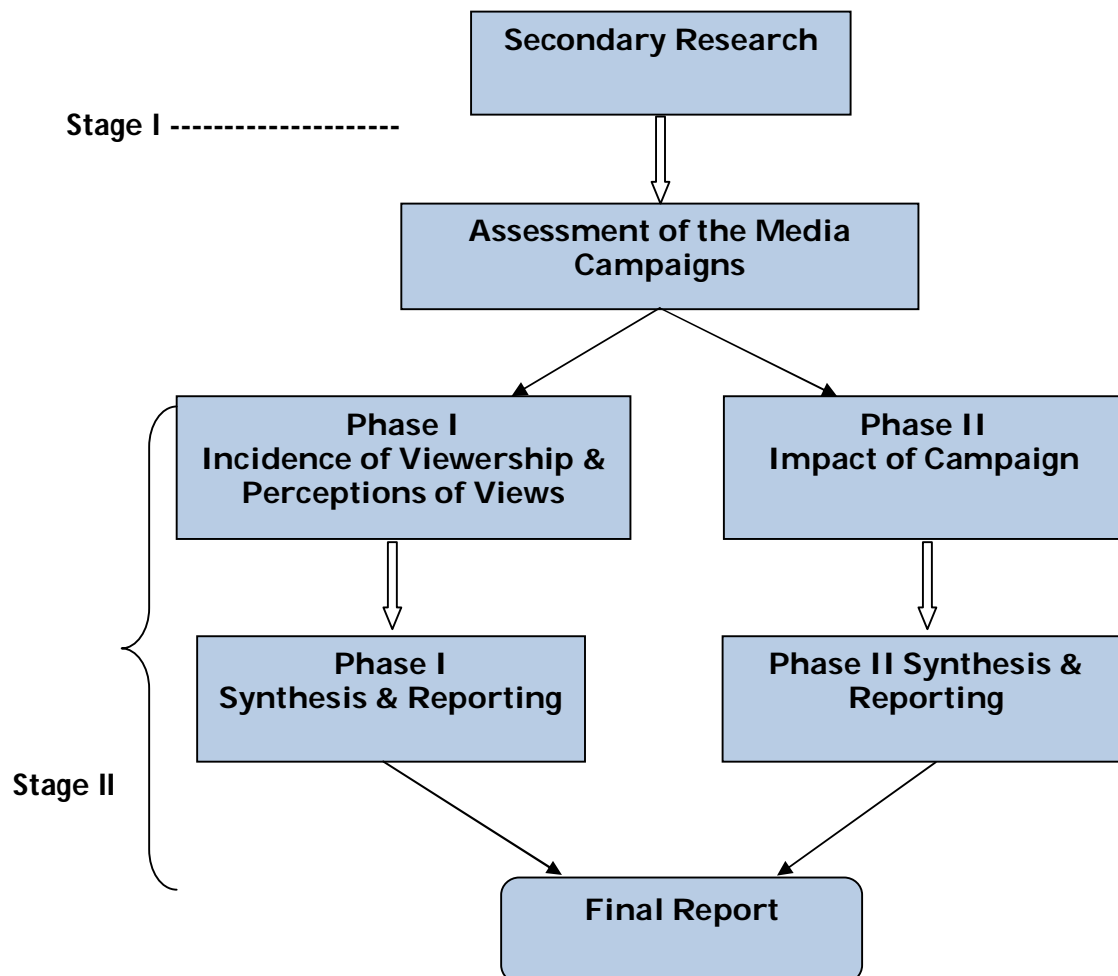
- ✚ Social networking sites like Face book
- ✚ Travel Websites
- ✚ You Tube
- ✚ Search Engines like Google, Yahoo, etc.

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

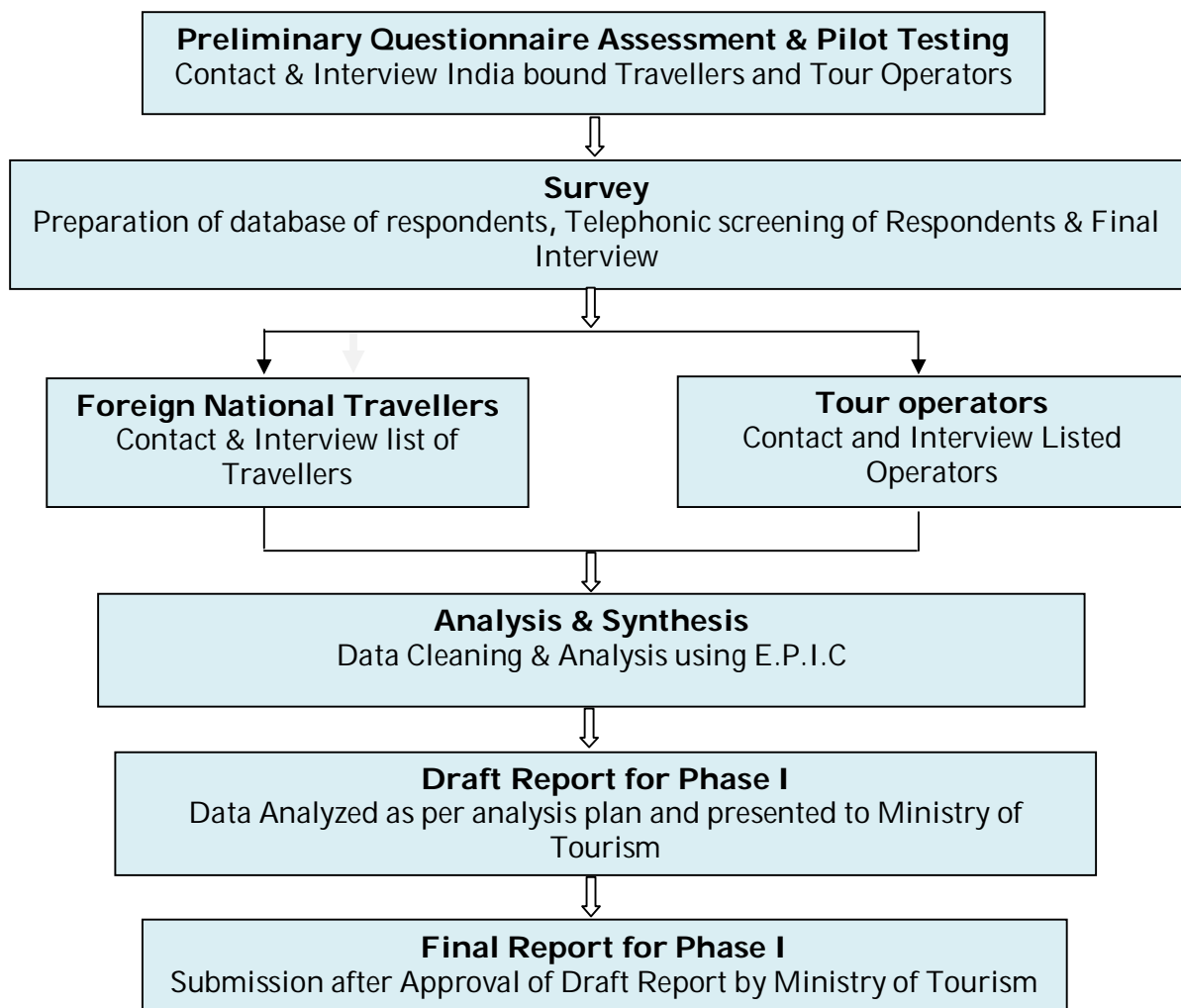
2. Stage II : Assessment of the Media Campaign

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.

1.1 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	
USA	600	458	1058

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

	USA
Completed Sample / Interviews	1058
Targeted Respondents for Achieving Sample	6045
Incidence / Hit Rate	18%

Chapter Two PHASE - ONE

2.1 Brief Introduction to the Country – United States of America



The United States of America, popularly known as USA or US or America is a country comprising of 50 states and a federal district. The US economy is the world's largest national economy and its per capita income is the world's sixth largest. It is the first country to possess nuclear weapons and is a permanent member of the United Nations Security Council. It is a leading economic, political and cultural force in the world. The US has a capitalist mixed economy and possesses abundant natural resources, well developed infrastructure and high productivity. A few of the most well-

known cities of USA are New York, Los Angeles, Chicago, Las Vegas, Boston, Miami, San Francisco with Washington D.C. being its capital.

The United States of America is also one of the most ethnically diverse and multicultural nations of the world due to large scale immigrations. White Americans are the largest racial group; German Americans, Irish Americans, and English Americans constitute three of the country's



four largest ancestry groups. African Americans are the nation's largest racial minority and third largest ancestry group. Asian Americans are the country's second largest racial minority. The presence of immigrants boosted travel to and from US a great deal. USA holds the 2nd rank in the world, in terms of International Tourist Arrivals (2010). Americans constitute the top most slots amongst foreign visitors to India.

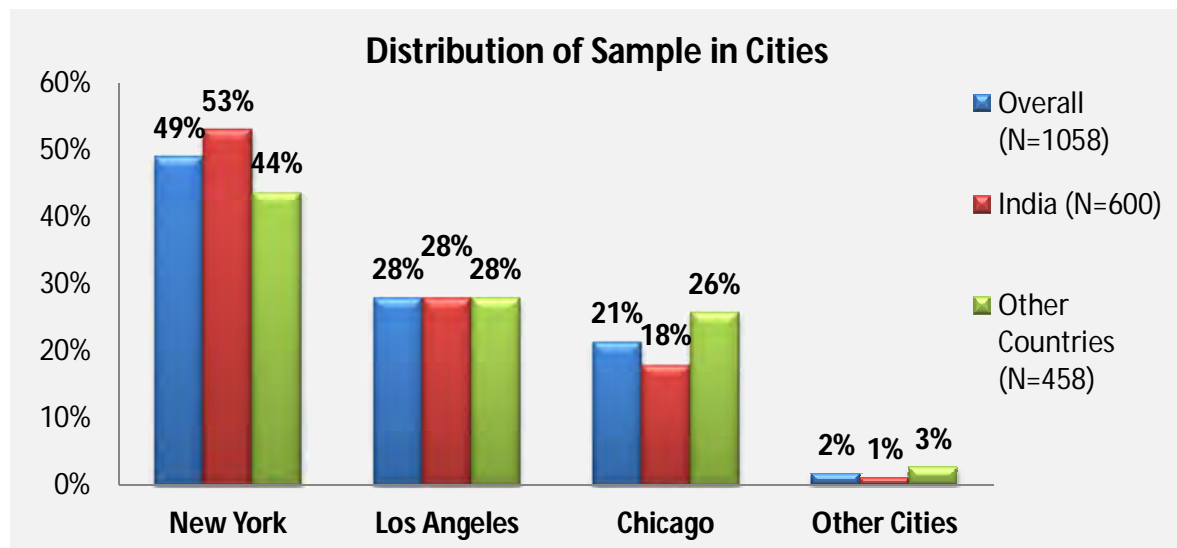
2.2 Primary Study Findings – United States of America

2.2.1 Demography of Travellers

A total of 1058 travellers were interviewed in the country of United States of America. 600 of the 1058 respondents were travelers who have visited India in the past and the remaining 458 were travelers who have visited countries other than India in the past.

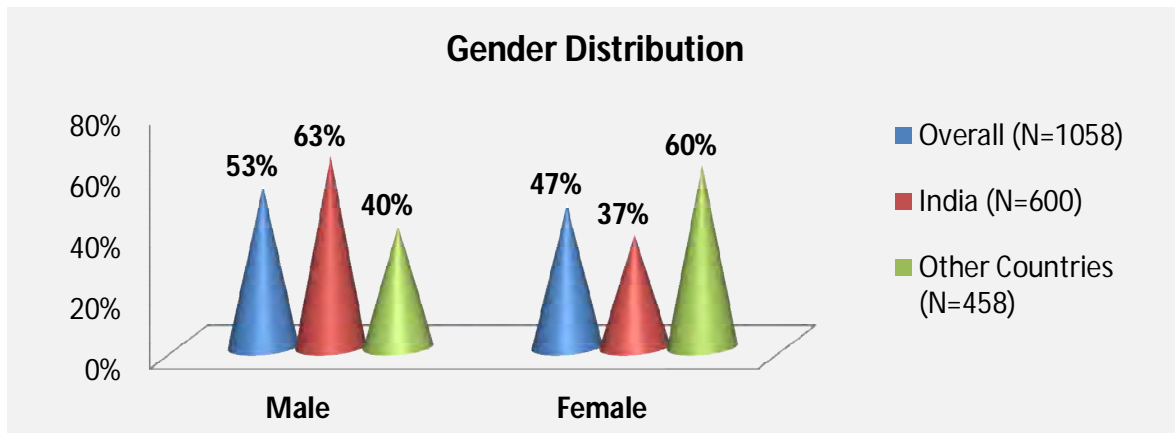
2.2.1.1 Distribution of Travellers in Cities

49% of the travellers (518) were interviewed in New York, followed by 28% travellers (298) in Los Angeles. In Chicago, interviewed travellers consisted of 21% of total and the rest 2% of travellers belonged to other cities like New Jersey and San Francisco. Travellers to India were interviewed more in New York than in the other cities of United States of America.



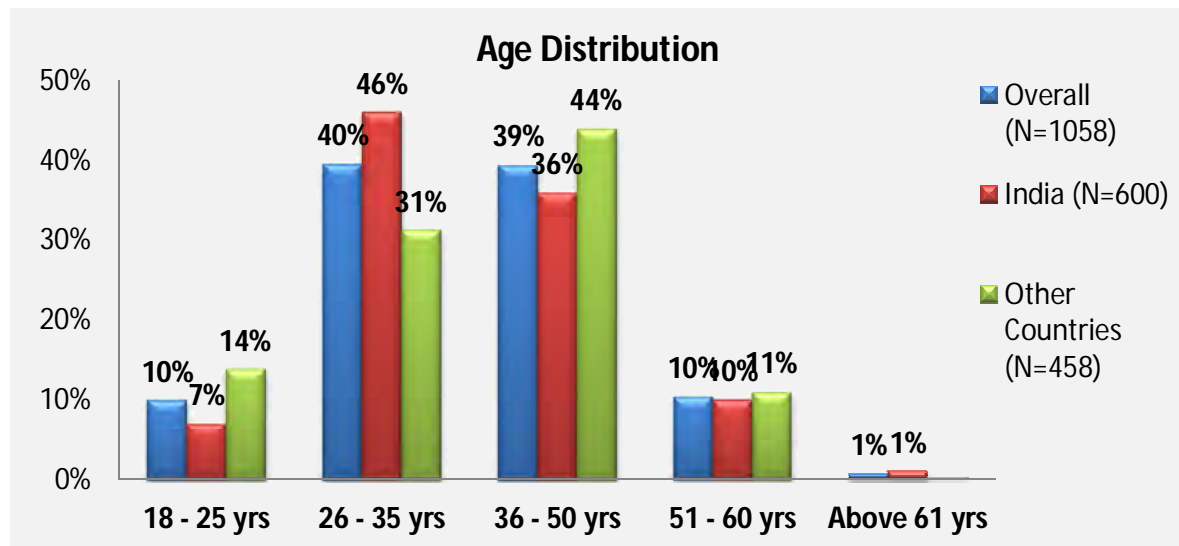
2.2.1.2 Gender Distribution of Travellers

53% of the travellers (559) were males and 47% of the travellers (499) were females. Travellers to other countries were more females (60%) whereas travellers to India were more males (63%).



2.2.1.3 Age Distribution of Travellers

Majority of travellers belong to the age group of 26 to 50 years (79% of total 1058 travellers surveyed in USA). Out of the majority, 40% belongs to the age group of 26-35 years and the rest 39% belong to the age group of 36-50 years. 10% of the travellers each belong to the age group of 18-25 years and 51-60 years. Only 7 travellers interviewed were above 61 years of age. Travellers to countries other than India, lie more in the age group of 36-50 years, whereas, travellers to India lie more in the age group of 26-35 years.



2.2.2 Travel Behaviour

2.2.2.1 Countries Travelled in Past by Travellers

600 travellers (57% of total interviewed in USA) had travelled to India in the past. 458 travellers had travelled to other countries in the past. Out of the other countries visited by 458 travellers from USA, United Kingdom is the top most with 10% (417 visits) of total visits, followed by France, Italy and Germany.

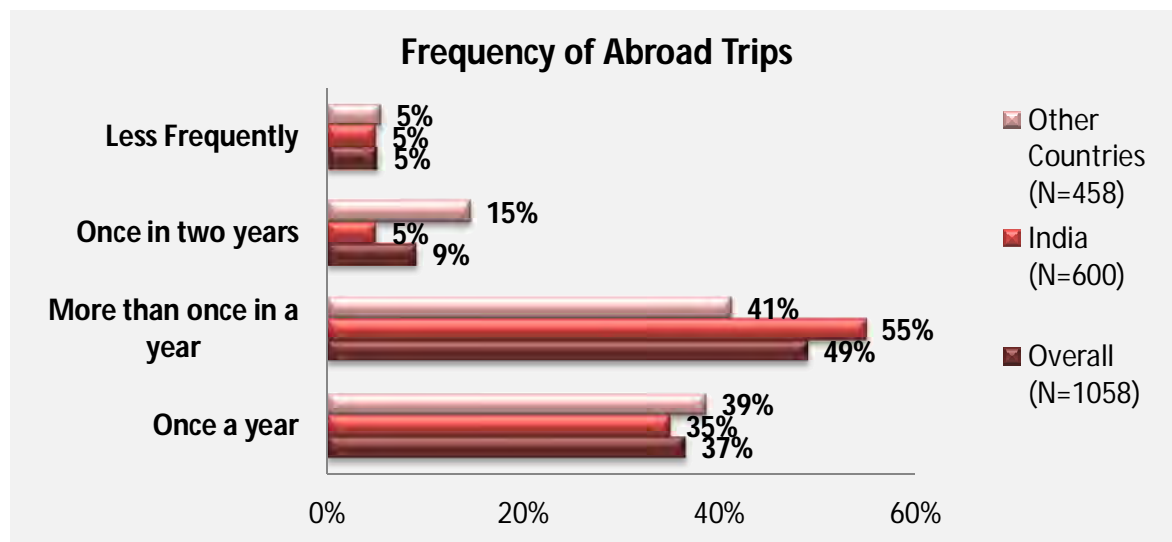
	Frequency	Percent
India	600	57%
Other Countries	458	43%
Total	1058	100%

Country	Frequency	Percent
USA	0	0%
UK	417	10%
France	332	8%
Italy	328	8%
Spain	296	7%
Germany	312	8%
Malaysia	124	3%
Indonesia	173	4%
Thailand	205	5%
China	303	7%
Japan	278	7%

Australia	271	7%
UAE	136	3%
Russia	173	4%
Other North American Countries	216	5%
Latin American Countries	219	5%
Other European Countries	173	4%
Other Middle Eastern Countries	71	2%
Other Asian Countries	79	2%
Total	4106	100%

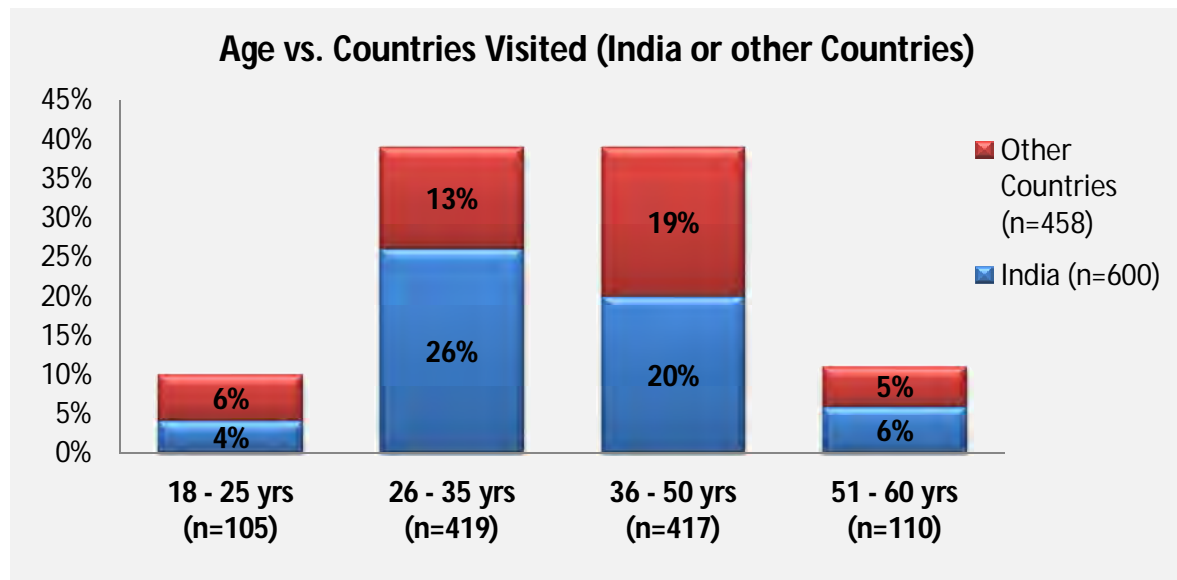
2.2.2.2 Frequency of Abroad Trips by Travellers

Almost half of the travellers from USA (49%) travel more than once in a year. 37% of the total (387 respondents) mentioned that they travel abroad once in a year. 9% of the total respondents from USA travel once in 2 years while the remaining 5% travel abroad less frequently. Past travellers from United States of America to India travel more frequently than travellers to countries other than India.



2.2.2.3 Age of Travellers against Countries Travelled in Past

26% of the total respondents belong to the age group of 26-35 years and have visited India in the past followed by 20% of travellers belonging to age group of 36-50 years and having travelled to India. 19% 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 European countries and Australia (4.5% have travelled to United Kingdom, 4.3% to Italy, 4.2% to France, 3.8% to Spain and 3.8% to Australia). 4.4% of total respondents (180 visits by travellers), belonging to the age group of 36-50 years, have travelled to United Kingdom.

Country	18 - 25 yrs	26 - 35 yrs	36 - 50 yrs	51 - 60 yrs	Above 61 yrs	Total
USA	0	0	0	0	0	0
UK	20	186	180	31	0	417
France	30	173	111	18	0	332
Italy	25	176	104	23	0	328
Spain	26	154	105	11	0	296
Germany	27	146	112	21	6	312
Malaysia	14	58	40	6	6	124
Indonesia	6	107	60	0	0	173
Thailand	22	122	58	3	0	205
China	31	139	111	16	6	303
Japan	17	149	104	8	0	278
Australia	24	156	82	9	0	271
UAE	13	73	43	7	0	136
Russia	15	91	64	3	0	173
Other North American Countries	24	88	68	35	1	216
Latin American Countries	45	68	79	27	0	219

Other European Countries	22	63	48	40	0	173
Other Middle Eastern Countries	9	16	26	20	0	71
Other Asian Countries	7	25	35	12	0	79
Total	377	1990	1430	290	19	4106

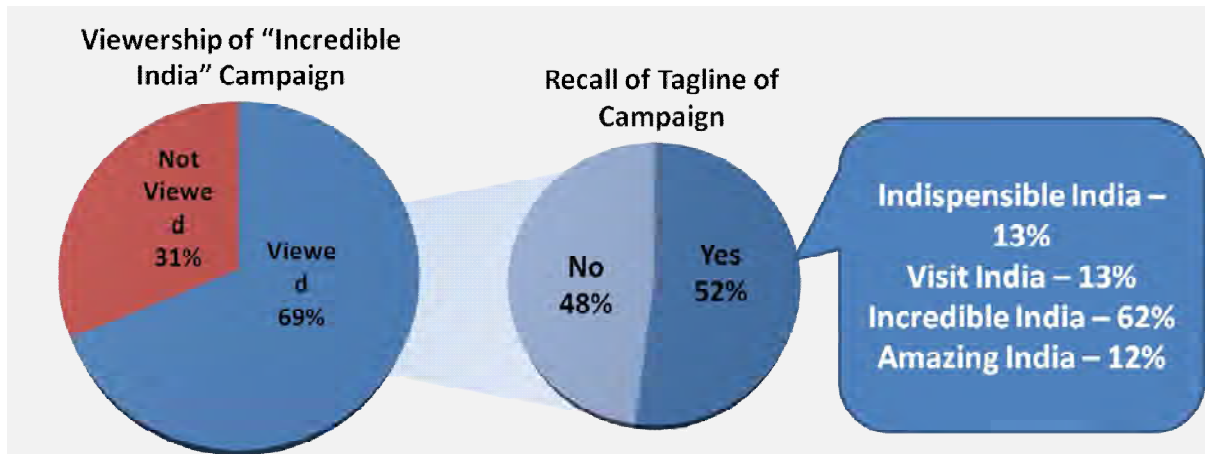
Country	18 - 25 yrs	26 - 35 yrs	36 - 50 yrs	51 - 60 yrs	Above 61 yrs	Total
USA	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
UK	0.5%	4.5%	4.4%	0.8%	0.0%	10.2%
France	0.7%	4.2%	2.7%	0.4%	0.0%	8.1%
Italy	0.6%	4.3%	2.5%	0.6%	0.0%	8.0%
Spain	0.6%	3.8%	2.6%	0.3%	0.0%	7.2%
Germany	0.7%	3.6%	2.7%	0.5%	0.1%	7.6%
Malaysia	0.3%	1.4%	1.0%	0.1%	0.1%	3.0%
Indonesia	0.1%	2.6%	1.5%	0.0%	0.0%	4.2%
Thailand	0.5%	3.0%	1.4%	0.1%	0.0%	5.0%
China	0.8%	3.4%	2.7%	0.4%	0.1%	7.4%
Japan	0.4%	3.6%	2.5%	0.2%	0.0%	6.8%
Australia	0.6%	3.8%	2.0%	0.2%	0.0%	6.6%
UAE	0.3%	1.8%	1.0%	0.2%	0.0%	3.3%
Russia	0.4%	2.2%	1.6%	0.1%	0.0%	4.2%
Other North American Countries	0.6%	2.1%	1.7%	0.9%	0.0%	5.3%
Latin American Countries	1.1%	1.7%	1.9%	0.7%	0.0%	5.3%
Other European Countries	0.5%	1.5%	1.2%	1.0%	0.0%	4.2%
Other Middle Eastern Countries	0.2%	0.4%	0.6%	0.5%	0.0%	1.7%
Other Asian Countries	0.2%	0.6%	0.9%	0.3%	0.0%	1.9%
Total	9.2%	48.5%	34.8%	7.1%	0.5%	100.0%

2.2.3 "Incredible India" Advertisement Campaign

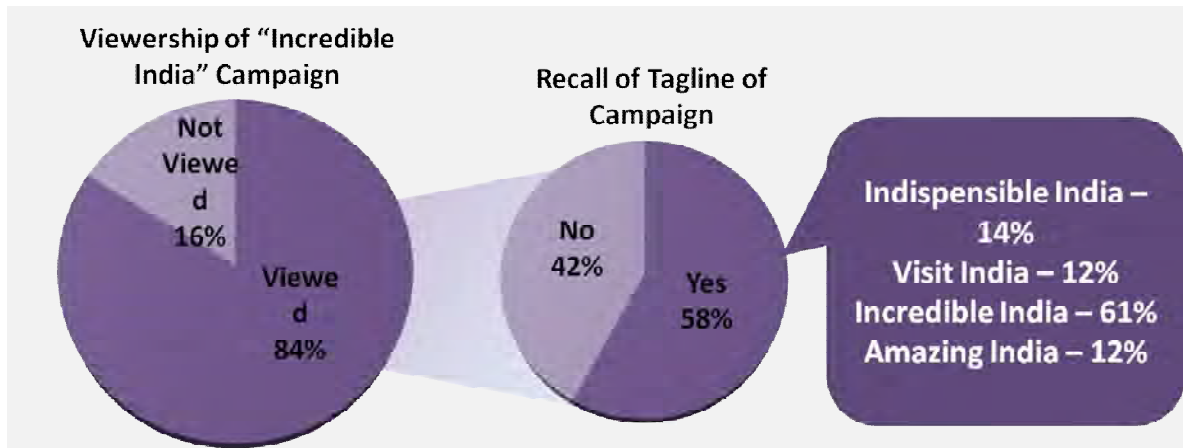
2.2.3.1 Viewership of Any "Incredible India" Campaign

69% of the total 1058 respondents mentioned that they have seen "Incredible India" campaigns. Out of the 69% who have viewed it, 52% mentioned that they could recall the tagline of the campaign. Out of the 52% who could recall the tagline, 62% could recall the Tagline of "Incredible India" exactly. Past travellers to India have viewed more campaigns of "Incredible India" and can recall the tagline more than those travellers who have visited countries other than India.

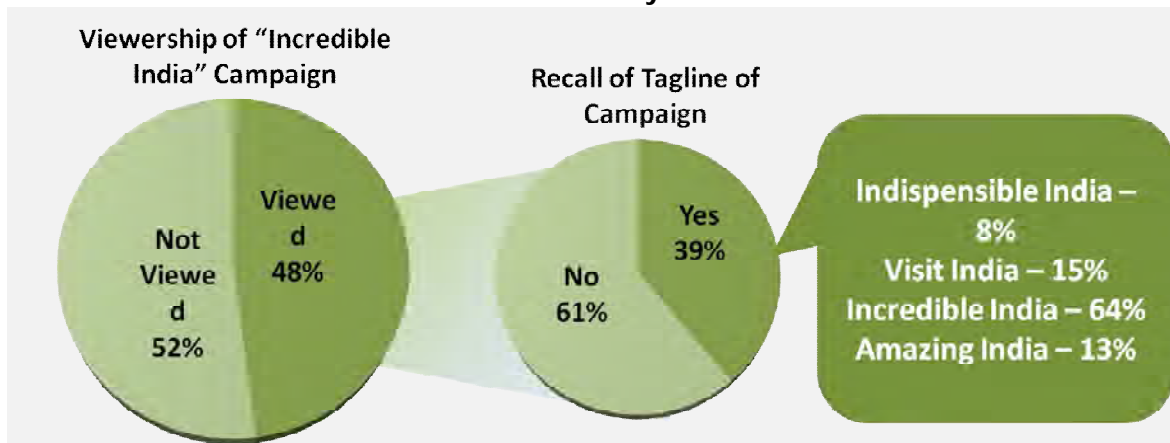
All Travellers



Past India Travellers



Past Other Country Travellers

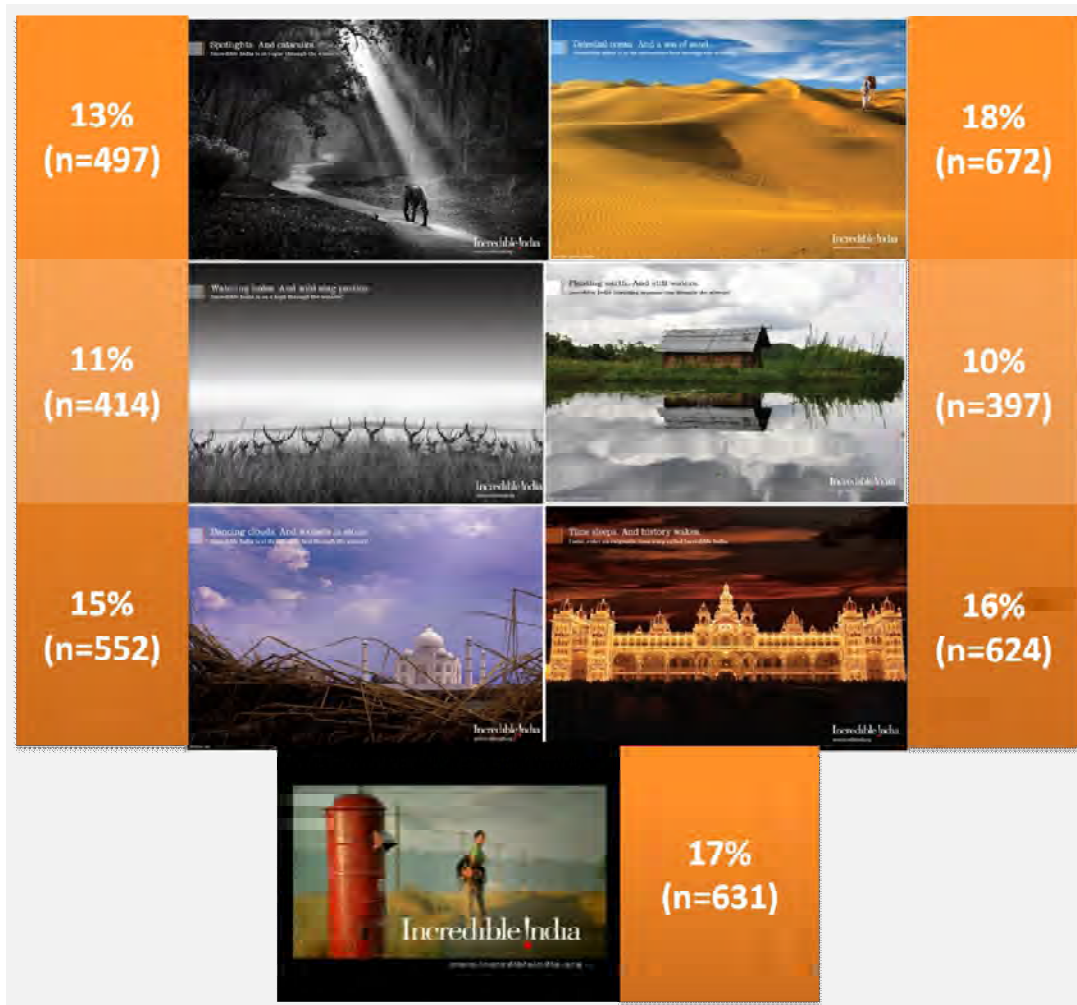


2.2.3.2 Viewership of Current Advertisements of the Campaign

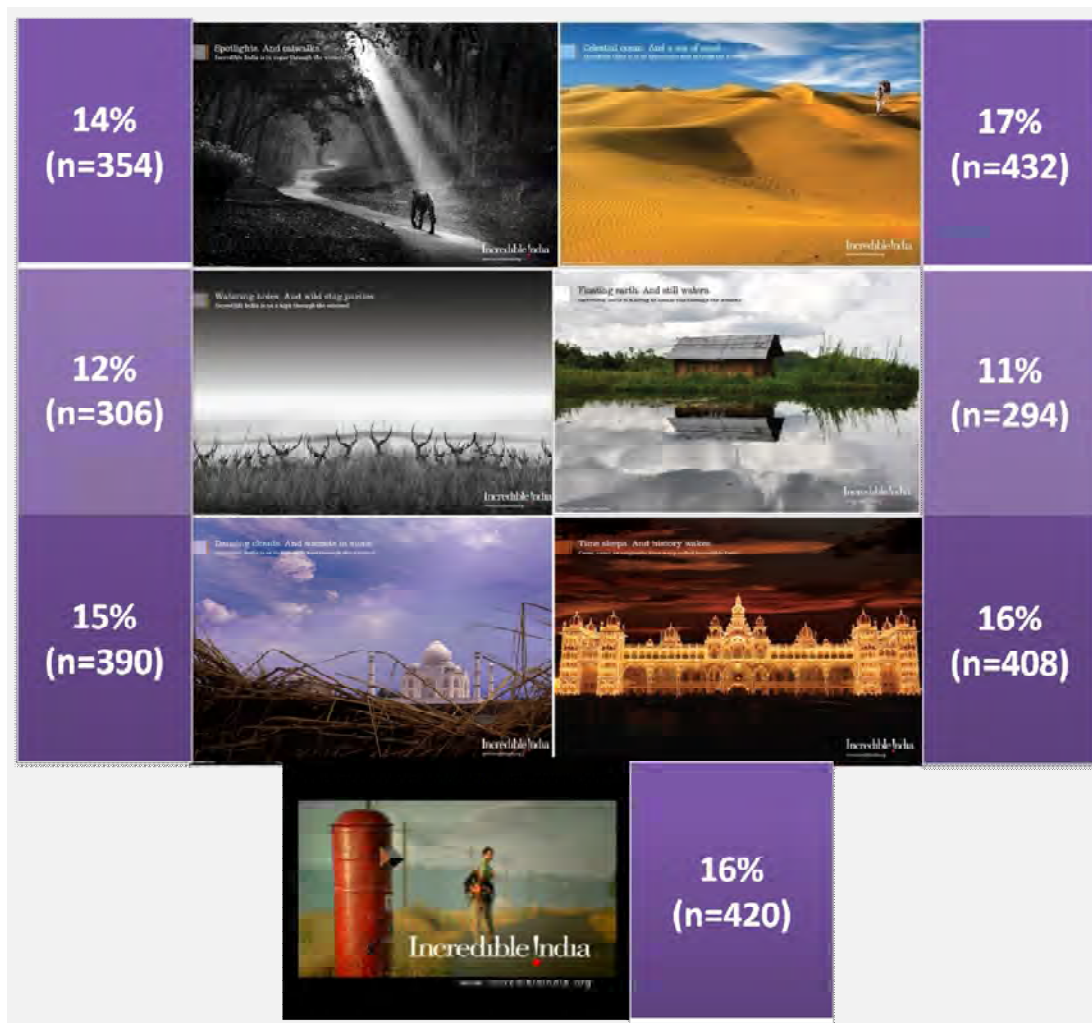
Out of the 6 print advertisements and 1 video advertisement, the most viewed advertisement was the "Celestial Ocean" ad featuring the deserts of India. The second most viewed advertisement was the video (17%),

followed by the Mysore palace (16%) and Taj Mahal (15%). The least viewed advertisement was the print advertisement featuring a single hut in Manipur (10%). No huge variation between the past travellers to India and past travellers to other countries can be observed when it comes to viewing of the advertisements.

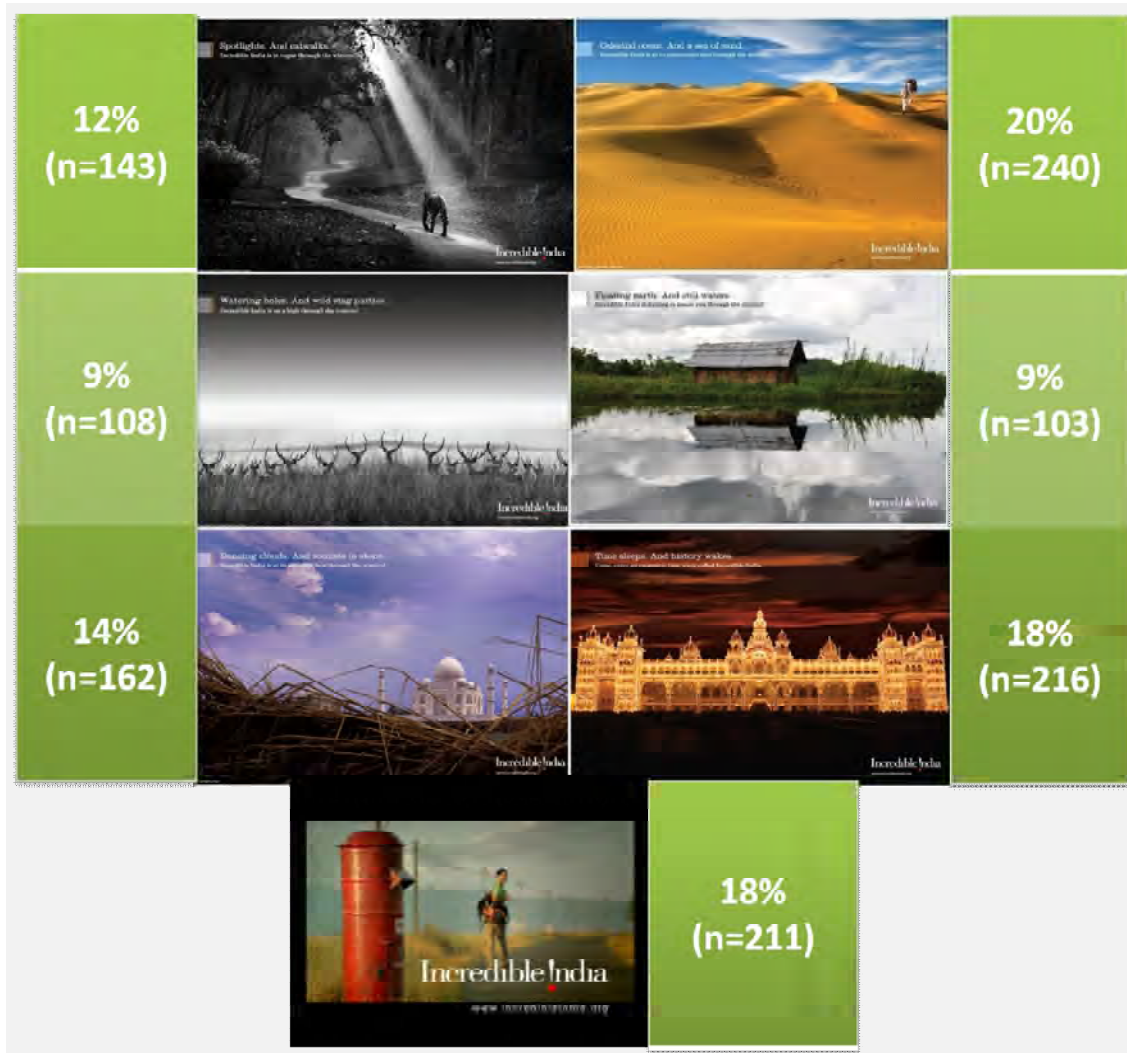
All Travellers



Past India Travellers



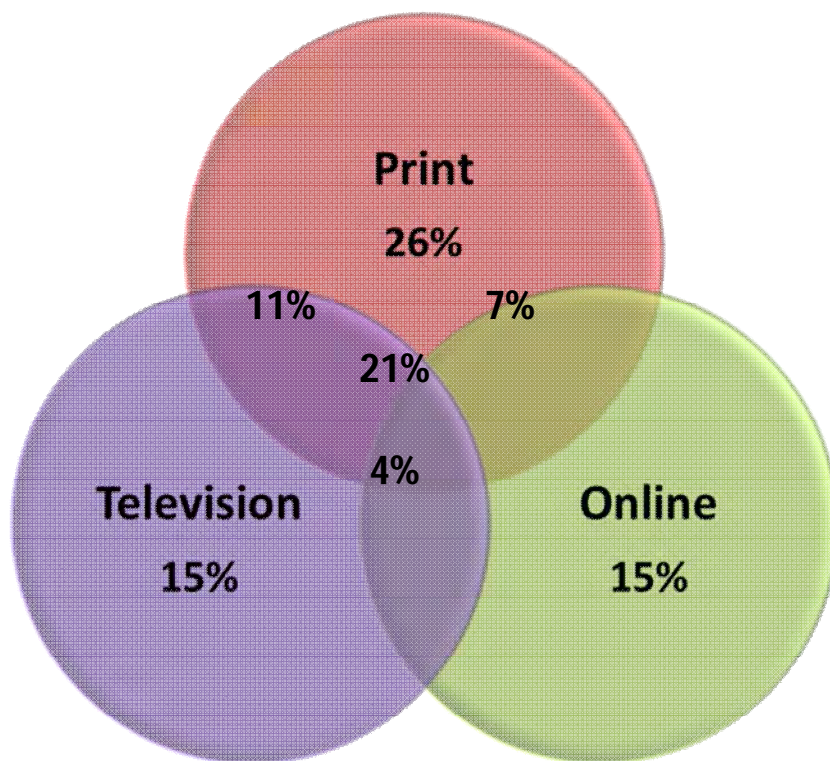
Past Other Country Travellers



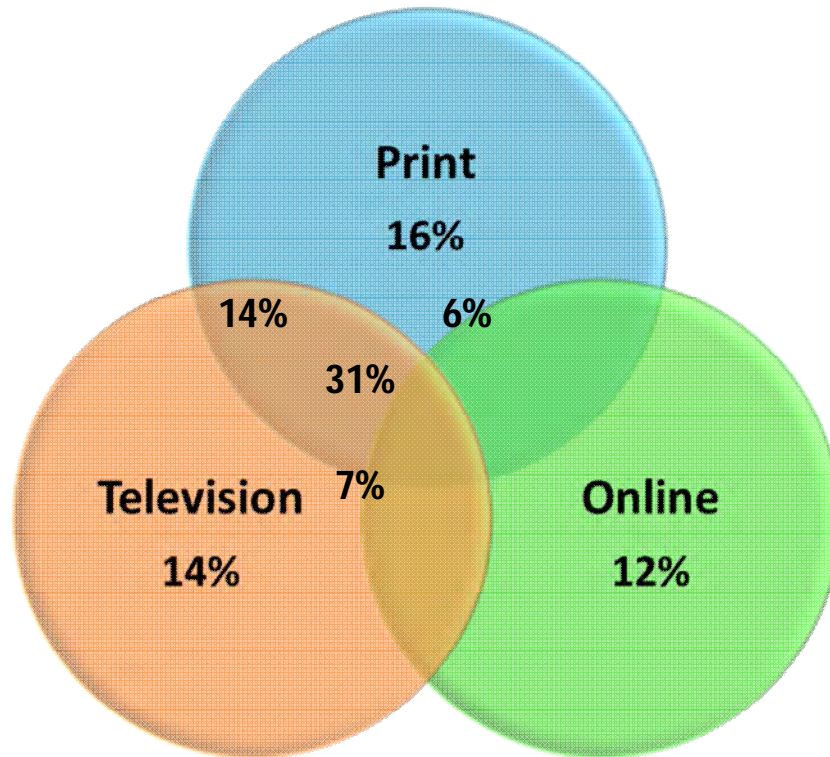
2.2.3.3 Advertisement Viewing Medium

26% of the total 1058 respondents saw the advertisements in the print media only. 21% of the total 1048 respondents saw the advertisements in all the three mediums of print, television and online. 15% of the total 1058 respondents mentioned that they saw the advertisements only online and 15% only in television. The advertisements only in the print medium and in all the three mediums was watched more by past travellers to India from USA. The advertisements only in the online medium and only in television were watched more by past travellers to other countries.

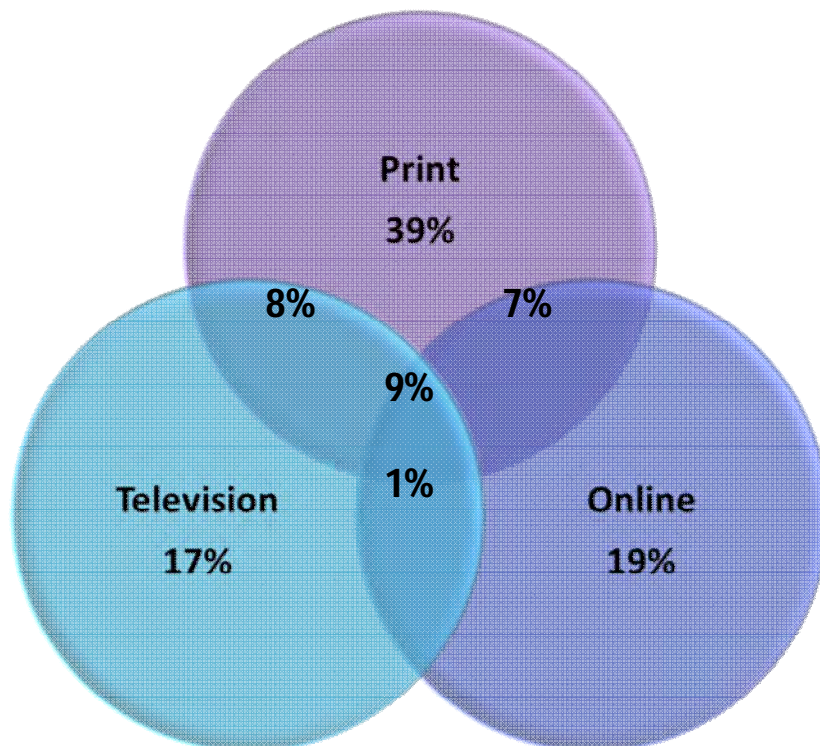
Advertisement Viewing Medium – All Travellers (N=1048)



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



Advertisement Viewing Medium – Past Other Country Travellers (N=458)



2.2.3.4 Television Channel in Which Advertisement was Viewed

In USA, BBC (12%, 373 views) followed by Travel Channel (8%, 257 views) and CNN (8%, 236 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 3% (89 views) of total views of the advertisement was reported. Past travellers to India saw the advertisements more in BBC (12%), whereas, past travellers to other countries, viewed the advertisements more in Travel Channel (16%), BBC (12%) and Discovery (10%).

Television	Overall		India		Other Countries	
	n	%	n	%	n	%
CNN	236	8%	192	7%	44	10%
CNN Airport Network	137	4%	120	5%	17	4%
BBC	373	12%	318	12%	55	12%
Sky News	166	5%	156	6%	10	2%
National Geographic Channel	206	7%	168	6%	38	8%
CBS	180	6%	156	6%	24	5%
Travel Channel	257	8%	186	7%	71	16%
Discovery	201	6%	156	6%	45	10%
Dmax	89	3%	84	3%	5	1%
TLC	164	5%	150	6%	14	3%
History	188	6%	156	6%	32	7%
Veria Health Channel	121	4%	114	4%	7	2%
Animal Planet	149	5%	126	5%	23	5%
Euro News	126	4%	114	4%	12	3%
Euro Sports	122	4%	114	4%	8	2%
CNBC	166	5%	138	5%	28	6%
MTV	164	5%	156	6%	8	2%
Any Other	50	2%	36	1%	14	3%
Total	3095	100%	2640	100%	455	100%

Other Television Channels	Overall		India		Other Countries	
	n	%	n	%	n	%
Cannot remember exactly which channel	35	70%	24	67%	11	79%
MSNBC	1	2%	0	0%	1	7%
Sony	6	12%	6	17%	0	0%
Star India	1	2%	0	0%	1	7%
TV Asia	6	12%	6	17%	0	0%

Zee TV	1	2%	0	0%	1	7%
Total	50	100%	36	100%	14	100%

2.2.3.5 Newspapers / Magazines Where the Advertisements was Viewed

Amongst Global and American print media, American Express publications, majorly Travel & Leisure, was the magazine where the most views (14.1%, 419 views) of the print ads was reported by respondents. The second highest magazine where the print advertisements were viewed was National Geographic Traveller with 7% (206 views). The least views of print ads was reported from Associations & Meeting International (2.3%, 67 views). Amongst “other” mediums where the print advertisements was most viewed was the LA Times Travel Show (6 views).

Print (Global +USA)	Overall		India		Other Countries	
	n	%	n	%	n	%
Harvard Business Review	88	3.00%	84	3.70%	4	0.60%
International Herald Tribune	83	2.80%	72	3.20%	11	1.60%
Conference + Meetings World Magazine	96	3.20%	84	3.70%	12	1.70%
Wall Street Journal Magazine Global	129	4.40%	102	4.50%	27	3.90%
The Economist	144	4.90%	120	5.30%	24	3.50%
Financial Times Worldwide special reports	86	2.90%	78	3.40%	8	1.20%
How To Spend It	100	3.40%	90	4.00%	10	1.40%
Global Traveler	152	5.10%	120	5.30%	32	4.60%
Associations & Meeting International	67	2.30%	60	2.60%	7	1.00%
Harper's Bazaar	74	2.50%	60	2.60%	14	2.00%
Forbes Magazine	91	3.10%	66	2.90%	25	3.60%
New York Times T Magazine	174	5.90%	126	5.50%	48	7.00%
Washington Post Magazine	77	2.60%	72	3.20%	5	0.70%
Chicago Tribune Magazine	136	4.60%	120	5.30%	16	2.30%
Chronicle Magazine	87	2.90%	78	3.40%	9	1.30%
Robb Report	69	2.30%	60	2.60%	9	1.30%
The New Yorker	112	3.80%	78	3.40%	34	4.90%
Fortune US	92	3.10%	84	3.70%	8	1.20%
National Geographic Traveller	198	6.70%	120	5.30%	78	11.30%
Air France In-flight Magazine	85	2.90%	78	3.40%	7	1.00%
Delta Sky (In-flight Magazine of Delta Airlines)	206	7.00%	138	6.10%	68	9.90%

American Express Publications (Travel & Leisure, Food & Wine, Departures and Executive Travel)	419	14.10%	276	12.10%	143	20.70%
Conde Nast Traveler	166	5.60%	96	4.20%	70	10.10%
Any Other	33	1.10%	12	0.50%	21	3.00%
Total	2964	100.00%	2274	100.00%	690	100.00%

French & Australian Print Media	Overall		India		Other Countries	
	n	%	n	%	n	%
Grand Reportage	70	9.00%	66	9.60%	4	4.20%
Elle	76	9.70%	60	8.80%	16	16.70%
Le Nouvel Observateur	69	8.80%	60	8.80%	9	9.40%
Serie Limitee	112	14.40%	108	15.80%	4	4.20%
Australian Gourmet Traveller	87	11.20%	78	11.40%	9	9.40%
Sunday Magazine	103	13.20%	72	10.50%	31	32.30%
The Weekend Australian Magazine	101	12.90%	96	14.00%	5	5.20%
Wish	57	7.30%	54	7.90%	3	3.10%
Reader's Digest	105	13.50%	90	13.20%	15	15.60%
Total	780	100.00%	684	100.00%	96	100.00%

Other Print Media	Overall		India		Other Countries	
	n	%	n	%	n	%
Cannot Recall	16	48%	6	50%	10	48%
Billboard	1	3%	0	0%	1	5%
Budget travel	2	6%	0	0%	2	10%
Bus	1	3%	0	0%	1	5%
India Tribune	2	6%	0	0%	2	10%
LA Times show	6	18%	6	50%	0	0%
New York Times Travel Expo	1	3%	0	0%	1	5%
Time	1	3%	0	0%	1	5%
United Airlines In-flight Magazine	3	9%	0	0%	3	14%
Total	33	100%	12	100%	21	100%

2.2.3.6 Online Media Where the Advertisements was Viewed

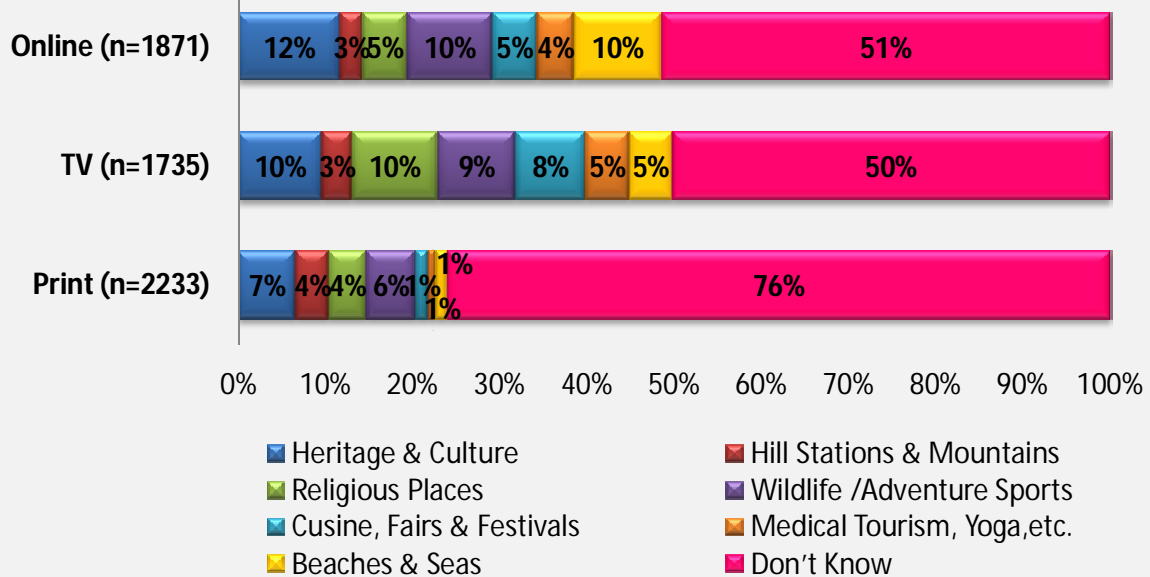
Yahoo (16.1%, 297 views), followed by Facebook (13.6%, 250 views) were the websites where the advertisements were most viewed. Eurosports with 8.2% views (151 views) was the website where the advertisements were least viewed. Yahoo (20.3% and Facebook (15.7%) were the websites through which the past travellers from USA to other countries saw the advertisements more than the past travellers to India.

Online	Overall		India		Other Countries	
	Frequency	Percent	Frequency	Percent	Frequency	Percent
BBC.com	198	10.8%	162	11.0%	36	9.7%
Eurosports.com	151	8.2%	138	9.4%	13	3.5%
CNBC.com	172	9.3%	144	9.8%	28	7.6%
LinkedIn	164	8.9%	150	10.2%	14	3.8%
Facebook	250	13.6%	192	13.1%	58	15.7%
CondeNast Traveller	164	8.9%	138	9.4%	26	7.0%
Trip advisor	211	11.5%	144	9.8%	67	18.1%
Yahoo	297	16.1%	222	15.1%	75	20.3%
You Tube	233	12.7%	180	12.2%	53	14.3%
Total	1840	100.0%	1470	100.0%	370	100.0%

2.2.3.7 What the Advertisements Showcased Against the Viewing Medium

The respondents who viewed the advertisements in the online media felt that the advertisements showcased Heritage & Culture of India (12%) followed by Wildlife/Adventure Sports in India (10%) and beaches and seas (10%). The respondents, who viewed the advertisement in the Television, felt that the advertisement mostly Heritage & Culture (10%), religious places (10%) and Wildlife/Adventure Sports (9%). The respondents who viewed the advertisements in the print media felt that the advertisements primarily showcased Heritage & Culture (7%), followed by Wildlife/Adventure sports (6%). Majority of travellers, irrespective of the medium of viewing the advertisement, couldn't understand or didn't know what the advertisements were trying to showcase.

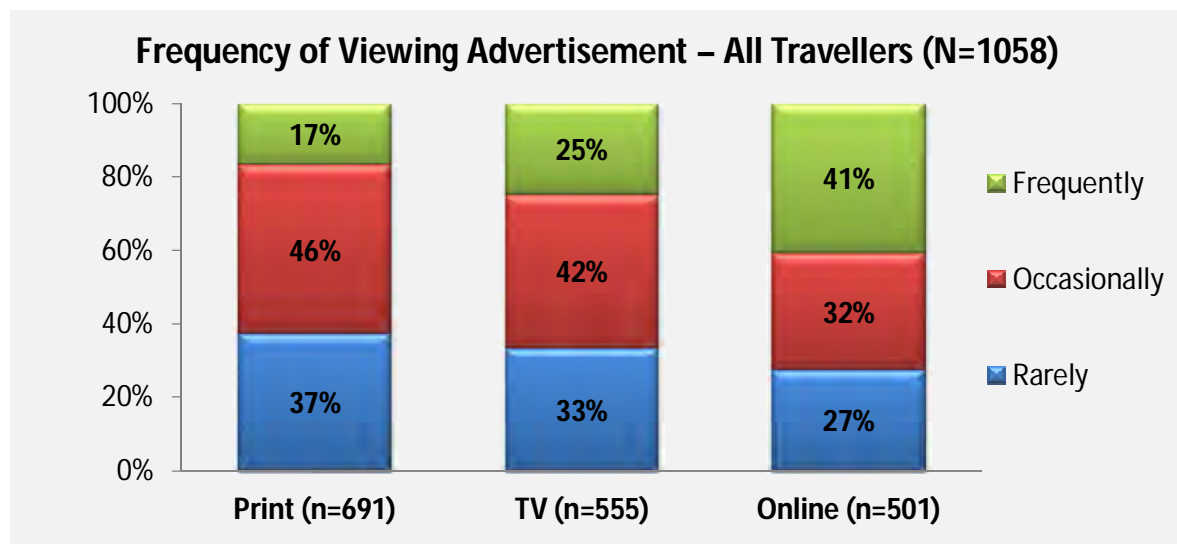
Viewing Medium vs. Ad Showcasing – All Travellers (N=1058)

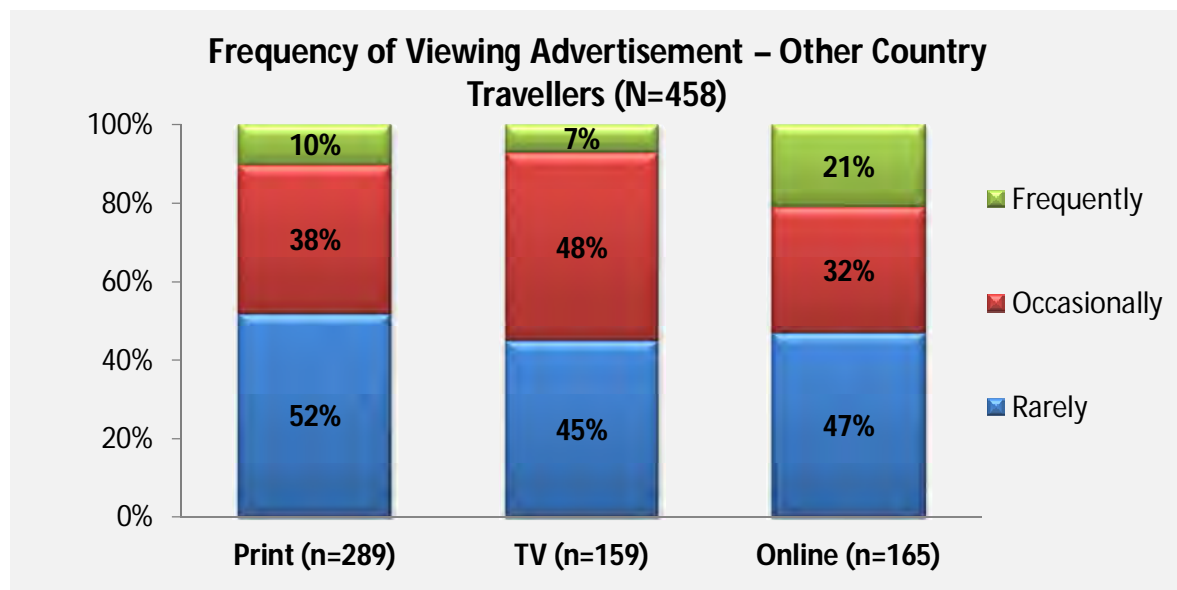
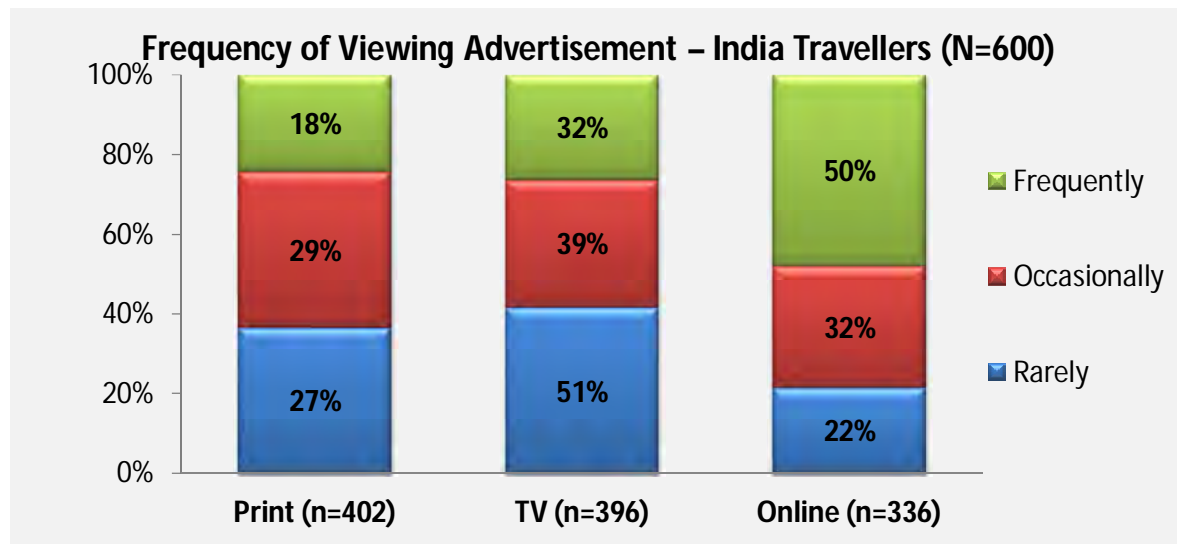


Showcasing of Ad	India (N=600)						Other Countries (N=458)					
	Print		Electronic		Online		Print		Electronic		Online	
	n	%	n	%	n	%	n	%	n	%	n	%
Heritage & Culture	106	7%	104	8%	158	12%	42	5%	63	13%	61	11%
Hill Station, Mountain	58	4%	40	3%	19	1%	27	3%	20	4%	29	5%
Religious Places	64	4%	104	8%	68	5%	31	4%	66	14%	28	5%
Wildlife/Adventure Sports	98	7%	110	9%	116	9%	29	4%	45	10%	67	12%
Cuisine, Fairs/Festivals	22	2%	108	9%	68	5%	10	1%	31	7%	28	5%
Medical Tourism/Yoga/Meditation	9	1%	44	3%	32	2%	10	1%	43	9%	47	8%
Beaches/Seas	16	1%	20	2%	68	5%	15	2%	67	14%	120	21%
Don't Know	1055	74%	736	58%	779	60%	641	80%	134	29%	183	33%
Total	1428	100%	1266	100%	1308	100%	805	100%	469	100%	563	100%

2.2.3.8 Frequency of Viewing Advertisement

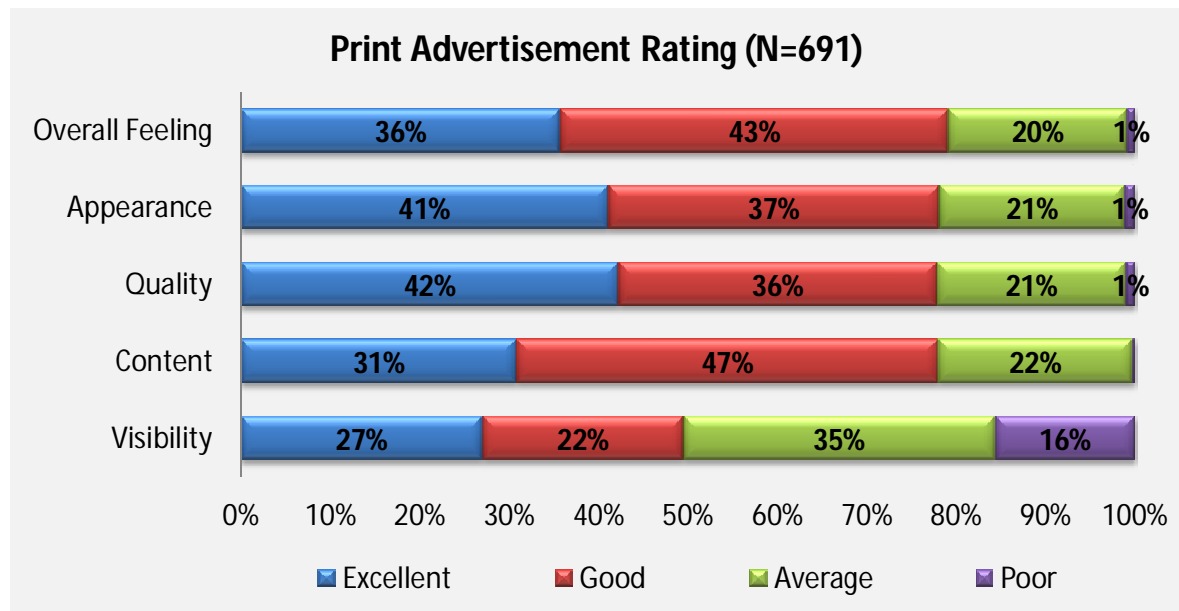
In the online media, the advertisements were the most frequently viewed (41%). In the print media and in television, the advertisements were more occasionally viewed than frequently. 46% of the respondents who viewed the advertisements in the print media said that they sighted the advertisements occasionally and 42% of the respondents who viewed the advertisements in the television, mentioned that they sighted the advertisements occasionally. The advertisements were viewed least frequently in the print media (17%). The past travellers to India from USA mentioned that they saw the advertisements more frequently in all the three mediums, than the past travellers to other countries from USA.





2.2.3.9 Opinion on the Advertisements in the Print Media

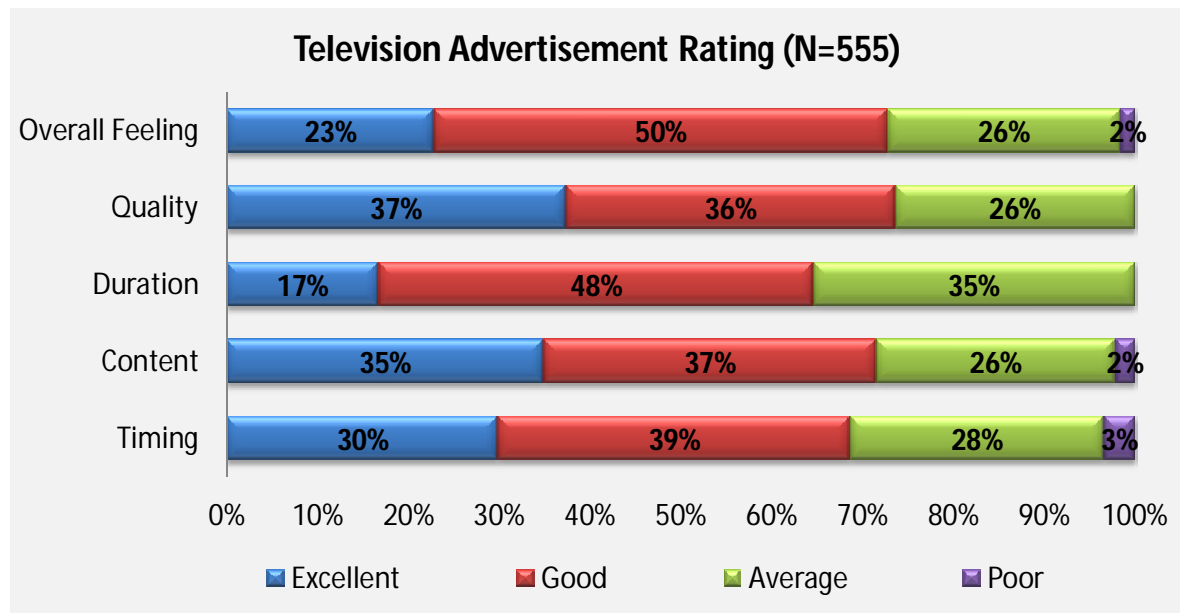
In the print media, the appearance (41%) and quality (42%) of the advertisements were excellent. The content (47%) and overall feeling about the advertisement (43%) of the advertisements in the print media were rated as good. In visibility, the advertisements were (35%). The past travellers to India felt that in only quality, the advertisements were excellent. The past travellers to other countries conveyed that in appearance, the advertisements were excellent.



	Print Media - Percentage- India					Print Media - Percentage - Other				
	Excellent	Good	Average	Poor	Total	Excellent	Good	Average	Poor	Total
Visibility	26%	21%	34%	19%	100%	28%	23%	35%	13%	100%
Content	34%	60%	6%	0%	100%	28%	38%	34%	1%	100%
Quality	48%	44%	6%	2%	100%	38%	29%	33%	0%	100%
Appearance	38%	52%	8%	2%	100%	43%	26%	31%	1%	100%
Overall Feeling	40%	54%	4%	2%	100%	32%	35%	32%	0%	100%
Total	37%	46%	12%	5%	100%	34%	30%	33%	3%	100%

2.2.3.10 Opinion on the Advertisements in the Television

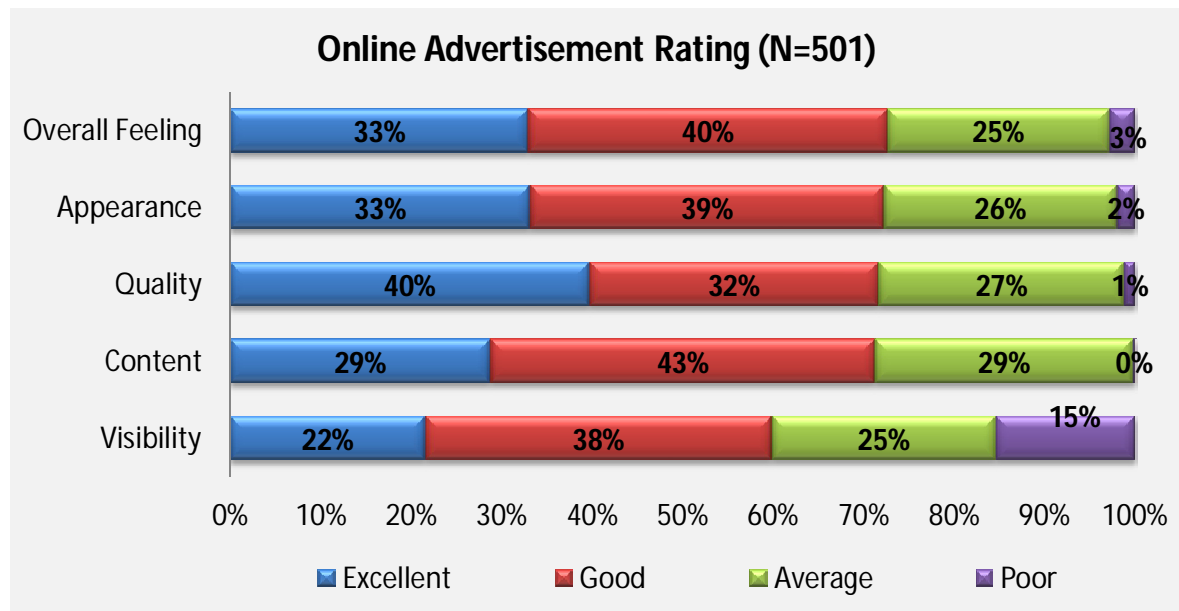
In the television, the quality (37%) was the only aspect that was rated as excellent. The duration of the advertisements (48%), content (37%), timing (39%) and overall feeling about the advertisements (50%) were rated as good. The past travellers to India felt that the advertisements were good in duration and overall feeling; whereas the past travellers to other countries conveyed that the advertisements were good in all the attributes.



	Television Media - Percentage - India					Television Media - Percentage - Other				
	Excellent	Good	Average	Poor	Total	Excellent	Good	Average	Poor	Total
Timing	29%	33%	33%	5%	100%	31%	52%	16%	1%	100%
Content	31%	33%	33%	3%	100%	45%	45%	10%	0%	100%
Duration	13%	45%	42%	0%	100%	27%	53%	19%	1%	100%
Quality	32%	33%	34%	0%	100%	50%	43%	6%	1%	100%
Overall Feeling	19%	48%	31%	2%	100%	33%	53%	11%	2%	100%
Total	25%	39%	35%	2%	100%	37%	49%	12%	1%	100%

2.2.3.11 Opinion on the Advertisements in the Online Media

In the online media quality (40%) of the advertisement was rated as excellent, whereas, appearance (39%), content (43%), visibility (38%) and overall feeling (40%) about the advertisement is rated as good. The past travellers from USA to India felt that the advertisements in the online medium was good in most of the attributes, whereas, the past travellers to other countries conveyed that, the advertisements were excellent in quality and overall feeling.



	Online Media - Percentage - India					Online Media - Percentage - Other				
	Excellent	Good	Average	Poor	Total	Excellent	Good	Average	Poor	Total
Visibility	20%	33%	30%	17%	100%	25%	48%	13%	13%	100%
Content	22%	39%	39%	0%	100%	42%	49%	8%	1%	100%
Quality	35%	27%	37%	2%	100%	50%	42%	7%	0%	100%
Appearance	29%	37%	32%	2%	100%	41%	44%	13%	2%	100%
Overall Feeling	27%	38%	32%	4%	100%	44%	44%	10%	1%	100%
Total	27%	35%	34%	5%	100%	41%	46%	10%	3%	100%

2.2.3.12 Most Striking Aspects of the Advertisements

The most striking aspect of the advertisements viewed in the print media was the beauty of the destinations (370 respondents ranked it number 1). The second most striking aspect of the advertisements viewed in the print media was the concept of the advertisement (119 respondents ranked it as number 1). The most striking aspect of the advertisement viewed in the television was again the beauty of the destinations (243 respondents ranked it as number 1), followed by the concept of the advertisement (109 respondents ranked it number 1). Similarly, the most striking aspects of

the advertisements viewed in the online media are beauty of the destinations (192 respondents ranked it 1), followed by the concept of the advertisement (125 number 1 rankings).

Overall												
THREE 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	84	44	35	163	82	55	31	168	91	30	33	154
Concept of the Ad	119	169	132	420	109	129	60	298	125	110	55	290
Beauty of the destinations	370	97	83	550	243	57	86	386	192	82	58	332
Music in the ad	0	0	0	0	60	122	103	285	50	111	121	282
Emotional attachment	40	160	127	327	45	106	144	295	35	97	106	238
Tagline/ caption of the ad	70	215	302	587	16	83	128	227	8	69	125	202
Other	8	6	12	26	0	3	3	6	0	2	3	5

India												
THREE 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	72	36	24	132	72	48	24	144	78	24	24	126
Concept of the Ad	66	90	54	210	78	90	30	198	90	66	30	186
Beauty of the destinations	168	54	66	288	144	30	72	246	90	54	42	186

Music in the ad	0	0	0	186	48	78	84	210	42	72	102	216
Emotional attachment	36	114	60	210	42	90	96	228	30	72	54	156
Tagline/caption of the ad	54	108	192	354	12	60	90	162	6	48	84	138
Other	6	0	6	12	6	0	6	12	6	0	6	12

Other												
THREE 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	12	8	11	31	10	7	7	24	13	6	9	28
Concept of the Ad	53	79	78	210	31	39	30	100	35	44	25	104
Beauty of the destinations	202	43	17	262	99	27	14	140	102	28	16	146
Music in the ad	0	0	0	0	12	44	19	75	8	39	19	66
Emotional attachment	4	46	67	117	3	16	48	67	5	25	52	82
Tagline/caption of the ad	16	107	110	233	4	23	38	65	2	21	41	64
Other	2	6	6	14	0	3	3	6	0	2	3	5

2.2.3.13 Message Conveyed Through the Advertisements

29% of the total 1058 respondents and 31% of the respondents don't know whether the advertisements were showcasing the Culture & Heritage of India and Variety of Food & Festivals, respectively. 32% of the total respondents somewhat agreed that the advertisements showcased Hospitality of India. Respondents neither agreed nor disagreed with the fact that the advertisements were showcasing developed rail & roads (25%) and 360 days destination (21%). Respondents did not at all agree

with the fact that the advertisements were showcasing yoga/ spiritualism (22%).

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	3	0%	52	5%	12	1%	171	16%	2	0%	122	12%	238	22%
Somewhat disagree	115	11%	147	14%	144	14%	214	20%	117	11%	144	14%	166	16%
Neither agree nor disagree	264	25%	167	16%	131	12%	264	25%	270	26%	219	21%	195	18%
Somewhat agree	219	21%	210	20%	341	32%	119	11%	229	22%	155	15%	130	12%
Very Strongly agree	149	14%	158	15%	208	20%	71	7%	123	12%	193	18%	97	9%
Don't Know	308	29%	324	31%	222	21%	219	21%	317	30%	225	21%	232	22%
Total	1058	100%	1058	100%	1058	100%	1058	100%	1058	100%	1058	100%	1058	100%

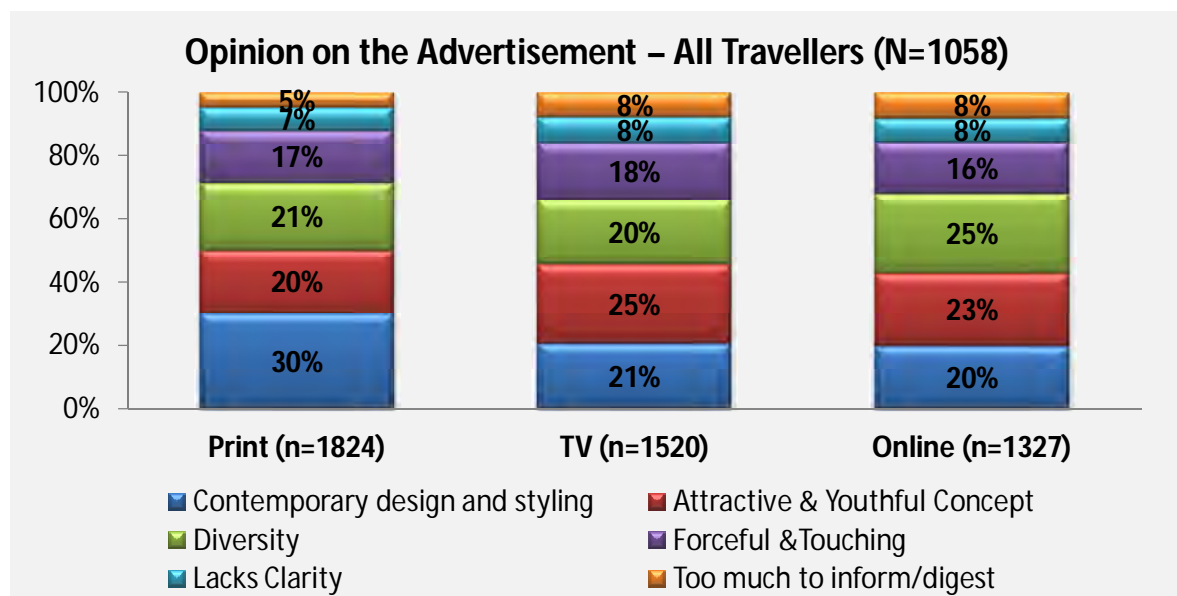
Past India Travellers														
What the Ad is trying to convey	Culture & Heritage		Variety of Foods & Festivals		Hospitality		Developed Rail & Roads		Worth Experiencing		360 Days Destination		Yoga/Spiritualism	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%
Not at all agree	2	0%	28	5%	8	1%	104	17%	1	0%	86	14%	128	21%
Somewhat disagree	56	9%	78	13%	54	9%	132	22%	76	13%	96	16%	104	17%
Neither agree nor disagree	174	29%	96	16%	92	15%	144	24%	164	27%	100	17%	114	19%
Somewhat agree	114	19%	106	18%	194	32%	76	13%	126	21%	118	20%	86	14%
Very Strongly agree	50	8%	76	13%	144	24%	28	5%	78	13%	98	16%	41	7%
Don't Know	204	34%	216	36%	108	18%	116	19%	155	26%	102	17%	127	21%
Total	600	100%	600	100%	600	100%	600	100%	600	100%	600	100%	600	100%

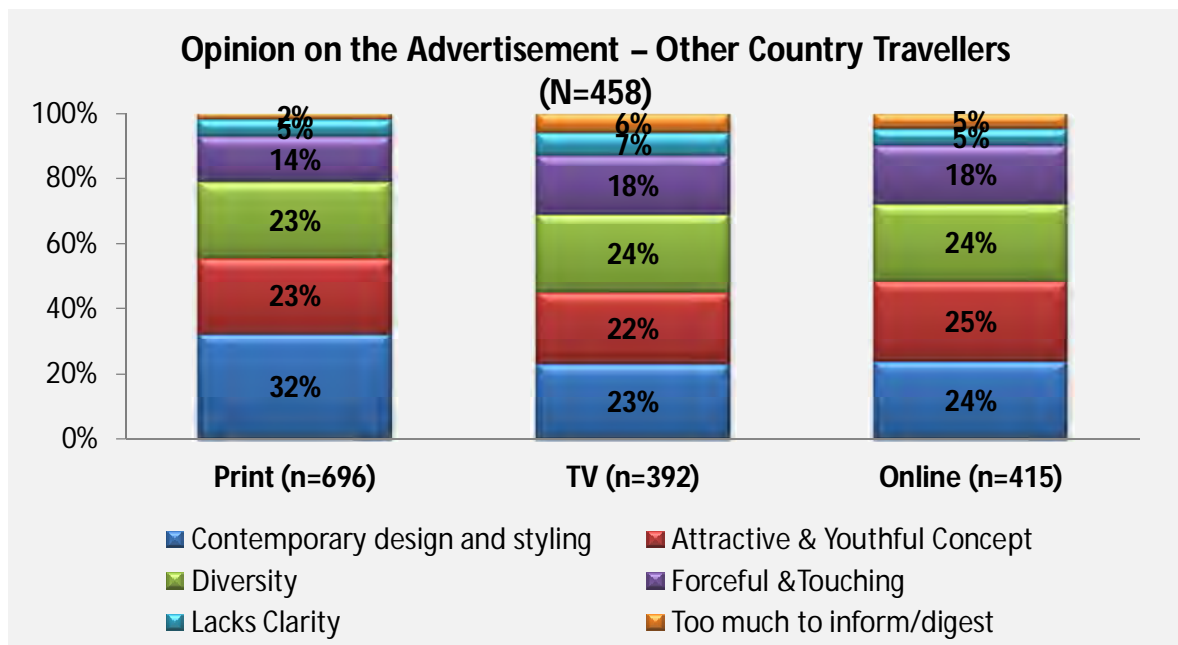
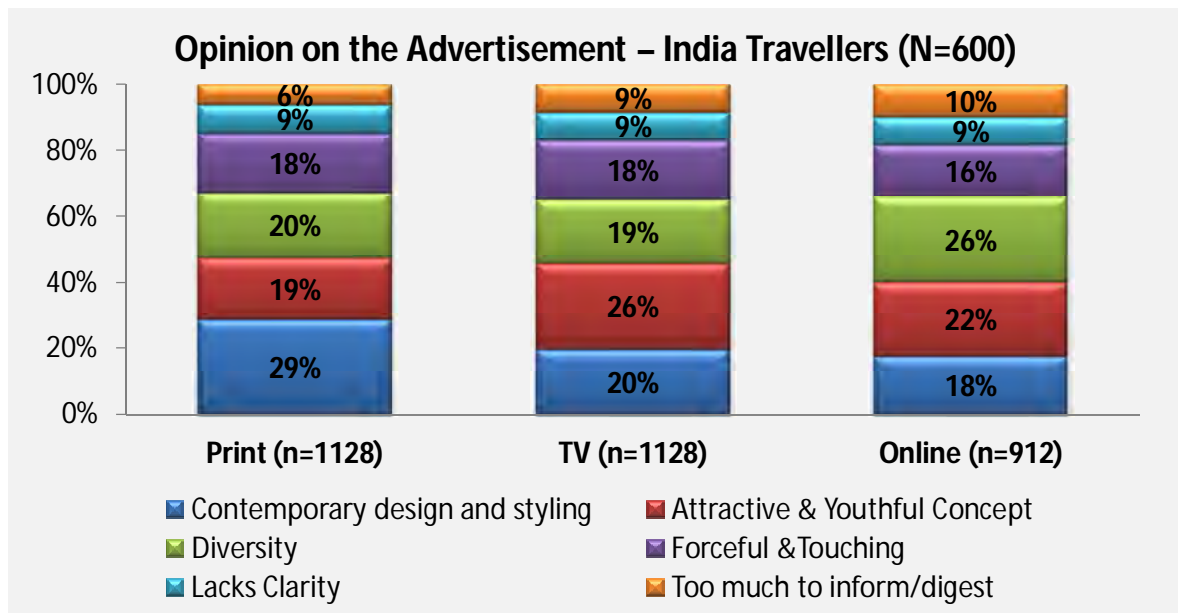
Past Other Country Travellers														
What the Ad is trying to convey	Culture & Heritage		Variety of Foods & Festivals		Hospitality		Developed Rail & Roads		Worth Experiencing		360 Days Destination		Yoga/Spiritualism	
	n	%	n	%	n	%	n	%	n	%	n	%	n	%

Not at all agree	1	0%	24	5%	4	1%	67	15%	1	0%	36	8%	110	24%
Somewhat disagree	59	13%	69	15%	90	20%	82	18%	41	9%	48	10%	62	14%
Neither agree nor disagree	90	20%	71	16%	39	9%	120	26%	106	23%	119	26%	81	18%
Somewhat agree	105	23%	104	23%	147	32%	43	9%	103	22%	37	8%	44	10%
Very Strongly agree	99	22%	82	18%	64	14%	43	9%	45	10%	95	21%	56	12%
Don't Know	104	23%	108	24%	114	25%	103	22%	162	35%	123	27%	105	23%
Total	458	100%	458	100%	458	100%	458	100%	458	100%	458	100%	458	100%

2.2.3.14 Opinion on the Advertisements

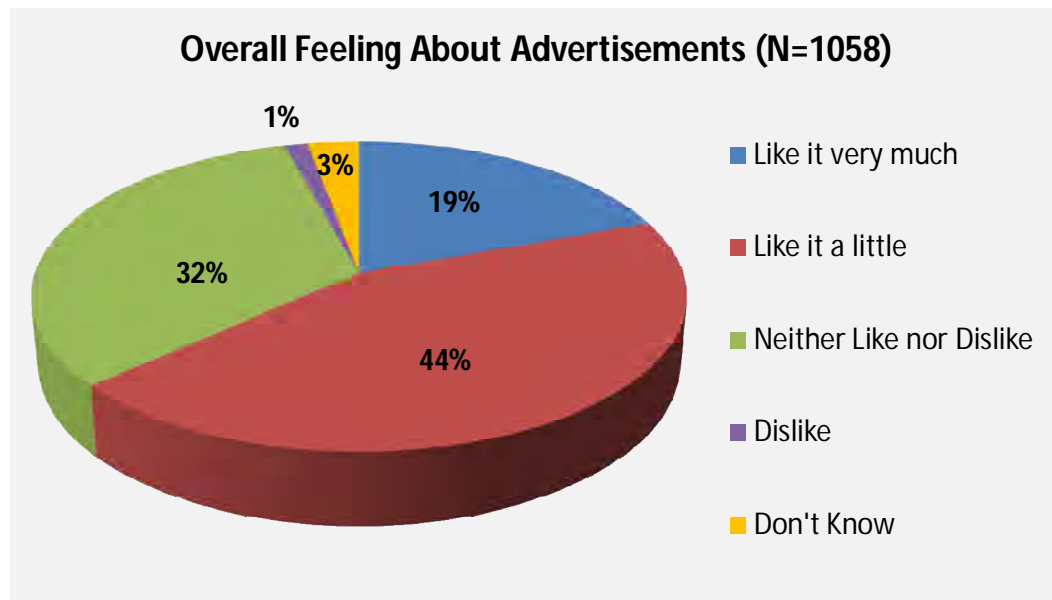
The respondents who viewed the advertisements, irrespective of the medium they viewed it in, felt that the advertisements had contemporary design & styling, had an attractive & youthful concept, presented the diversity of India and was forceful and touching. Both the past travellers to India and the past travellers to other countries are of the view that the advertisements have contemporary design and styling, are attractive & youthful in concept, portray diversity and are forceful and touching.





2.2.3.15 Overall Feeling about the Advertisements

19% of the total 1058 respondents mentioned that they liked the campaign very much, while 44% of the total respondents liked it somewhat. Past travellers to India like the advertisements a lot more than the past travellers to other countries.

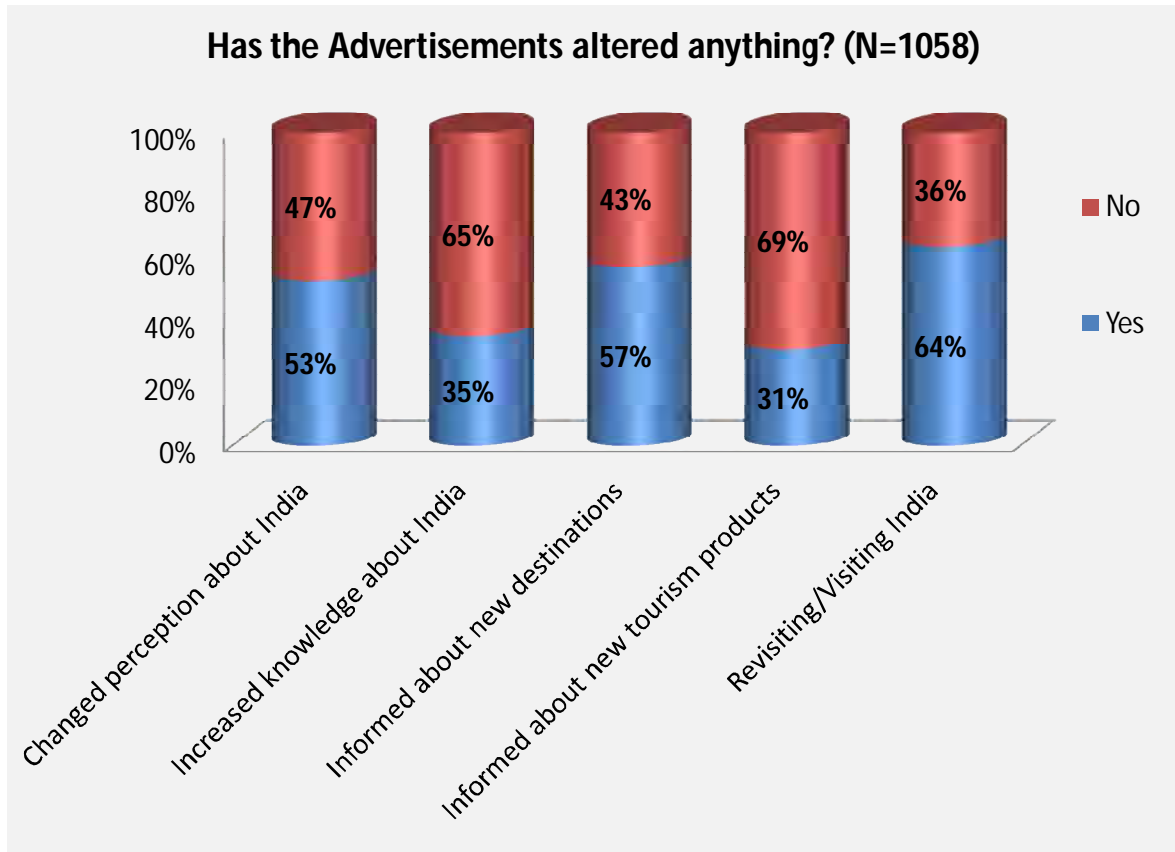


Which of these statements best describe your overall feeling about this advertisement of 'Incredible India'?	India		Other	
	Frequency	Percent	Frequency	Percent
Like it very much	163	27%	42	9%
Like it a little	256	43%	209	46%
Neither Like nor Dislike	158	26%	185	40%
Dislike	10	2%	4	1%
Don't Know	13	2%	18	4%
Total	600	100%	458	100%

2.2.3.16 Alteration through the Advertisements

Majority of the respondents, mentioned that the advertisements has changed their perceptions about India, Informed about new destinations, and majority respondents mentioned that the advertisements also has made them think about revisiting / visiting India. Majority of respondents mentioned that the advertisements have not increased their knowledge about India and also has not informed them about new tourism products. 65% of the past travellers to India mentioned that the advertisements have made them think of revisiting India. 62% of past other country

travellers said that the advertisements have made them think of visiting India.



Has the Advertisements Changed Anything?	India						Other					
	Yes		No		Total		Yes		No		Total	
Changed perception about India	250	42%	350	58%	600	100%	309	67%	149	33%	458	100%
Increased knowledge about India	160	27%	440	73%	600	100%	211	46%	247	54%	458	100%
Informed about new destinations of India	259	43%	341	57%	600	100%	348	76%	110	24%	458	100%
Informed about new tourism products in India	186	31%	414	69%	600	100%	141	31%	317	69%	458	100%
Revisiting/Visiting India	392	65%	208	35%	600	100%	282	62%	176	38%	458	100%

2.3 Qualitative Traveller Inputs – United States of America

- ✚ The US travellers have a bucket list and decide on the basis of that where to travel. The leisure travellers travel once in a year preferably for a 2 week vacation whereas business travellers travel more per year due to work.
- ✚ India is considered an expensive destination and it is visited largely by retired/elderly American travellers who have the money & time to spend and explore destinations. Awareness about India among this population is present and it's a specialized market. Travelling to India, by this specific target group is not an issue; it is affordable as well as attractive but the only constraint is how one can provide the information since the thought of going to India is complex. This needs to be changed and one has to speak the right language to spread the word.
- ✚ For an American traveller other than the Taj print advertisement, none of the images can be associated as nothing "Indian" is seen in the images. The caption needs to be something which creates interest. In all the images there is nothing that gives any desire of seeing that destination or experiences.
- ✚ The Caucasians are still not aware about India and about what is happening /changing in India. The advertisement needs to run in Main stream American television channels. The global channels are less watched than the main stream channels in USA.
- ✚ The thought that comes to the mind of an average American traveller regarding India is "How to reach? How to make that dream of visiting India possible?" Basic information about the India is not much present amongst the general American travellers.
- ✚ Travellers are scared that they will get cheated by locals while touring India and hence are apprehensive about visiting.

- ✚ Frequent travellers are mostly retired elderly travellers who have time and money to spend. Advertisement should be focused on this traveller group.
- ✚ The advertisement should be such that breaks the myth among the American travellers that India is expensive, far to travel, unclean, safe accommodation of high quality is not available etc.

2.4 Tour Operators / Travel Agent Inputs – United States of America

- ∞ Awareness about India is present but not as a regular tourist destination. Visibility of India is not enough. Americans prefer to go to the Caribbean Islands and European countries for their holidays.
- ∞ Most watched print ad is the desert image, but, it cannot be identified as India. Apart from the Taj Mahal (this particular image is not appreciated much) and Tiger print ad, none of the other advertisements resemble India.
- ∞ Trade has not seen any of the print ads and has seen the video only at Tourism Fairs and India Tourism Office presentations.
- ∞ Popular destinations in India are still the Golden Triangle and Kerala.
- ∞ Educational programs for tour operators are missing and are required.
- ∞ Visibility of ad is currently in global channels like CNN. Ad should be present in popular channels like CBS, ABC, and NBC etc. Prime time is morning news shows and late night chat shows.
- ∞ More focus to be given on the traditional aspects of India like - Forts, Palaces, temples, etc. Americans are fond of culture and heritage but do not compromise on luxury and comfort.
- ∞ Journalists, who have visited India, should be led to share their experience in the media. Besides this the Americans are IT savvy hence the best method to market India is through online branding and email blasts.

- ☞ The print images are not viewed much, but the video is engaging to the Americans. The trade and travellers both feel that the video is meant for backpackers as it involves fun music and diversity and not for luxury travellers. So target audience should be clearly defined.
- ☞ The print adverts are in “Landscape” format whereas the magazines are in portrait - this creates a problem for the reader.
- ☞ A huge part of the spending population in USA consists of NRIs and PIOs. Focus should be present in advertising India to them too through Indian channels there.
- ☞ Element of engagement is missing between trade and Ministry of Tourism, in the current promotional strategy. It is essential to remove that disconnect which is there because it is the trade which connects to the consumer and unless the trade is educated, made familiar with the destinations (its pros & cons), made aware about the new India, it shall be difficult to remove the myth that it is an expensive destination.
- ☞ The advertisement content should focus on culture, food, festivals, night life, shopping, star properties/ facilities, yoga and ayurveda to engage more prospective travellers.
- ☞ During the evenings /festival gathering/dinner meeting being organized invite actual travellers to share their live experience and interaction had while in India which is the most effective tool of marketing India as a destination.

Print Advertisements



The tiger in the advertisement clearly takes the mind of the viewer to India, but, the tiger being in black and white is not instantly identifiable and hence the advertisement cannot be associated with India instantly. The tiger is also small and is not in a proper profile to be positively identified as a TIGER. If the

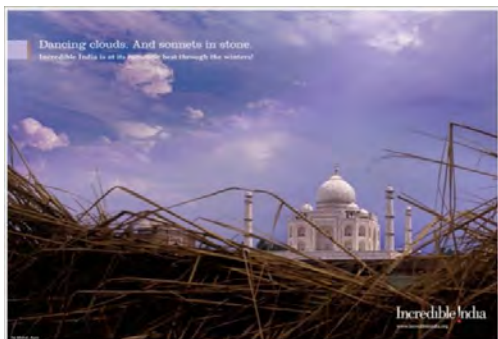
“Incredible India” tagline was not present in the advertisement, the image would have looked like that of a tiger in any national park in the world. The website

(www.incredibleindia.org) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.



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) 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) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.



This advertisement was the most viewed print advertisement in all the countries of USA, France and Australia. The advertisement, at the first instant reminded viewers of the African desert, Morocco, UAE, Dubai, etc, but not India. If the

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



This advertisement was one of the least viewed print advertisements in the countries of USA, France and Australia. The message that is being conveyed through the advertisement is not understandable by the viewers. The advertisement is drab and not at all representative of India. This hut in an island can

be anywhere in the world. If the “Incredible India” tagline was not present in the advertisement, the image would have looked like that of a hut in Laos or any other South Asian country. The website (www.incredibleindia.org) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.



This advertisement is also partially representative of India. Some viewers felt that if the architecture was clearly visible, it would have been identified as India. Although most viewers could identify the image as from India, some conveyed that, if the “Incredible India” tagline was not present in the advertisement, the

image would have looked like that of a palace in United Kingdom or Russia. The website (www.incredibleindia.org) is not legible at all. The small caption in the advertisement being in English was the reason why the advertisement was not liked by the French nationals.

Video Advertisement



The video advertisement is more representative of India. It shows the colours, costumes, festivals and experiences that constitute India. This video due to its typical Indian music is interesting and engaging to watch, but this video particularly aims at the young generation of travellers to visit India and is targeting backpackers. The video should feature a young family and / or an elderly couple, and then it will appeal to all categories of travellers. The tagline of “Incredible India” should be present throughout the video clip as the first 15-20 seconds of the video could be anywhere in Asia and cannot be directly connected to India.

General Feedback on the “Incredible India” Campaign

USA:

- Awareness about India is present but not as a regular tourist destination. Americans prefer to go to the Caribbean Islands and European countries for their holidays.
- Trade has not seen any of the print ads and has seen the video only at Tourism Fairs and India Tourism Office presentations.
- Travelers perceive India as a long haul but exotic & luxurious destination. Travelers are scared that they will get cheated by locals while touring India and hence are apprehensive about visiting.
- Frequent travelers are mostly retired elderly travelers who have time and money to spend. Advertisement should be focused on this traveler group.
- Popular destinations in India are still the Golden Triangle and Kerala.
- Educational programs for tour operators are missing and are required.
- Visibility of ad is currently in global channels like CNN. Ad should be present in popular channels like CBS, ABC, and NBC etc. Prime time is morning news shows and late night chat shows.

- More focus to be given on the traditional aspects of India like - Forts, Palaces, temples, etc. Americans are fond of culture and heritage but do not compromise on luxury and comfort.
- Journalists, who have visited India, should be led to share their experience in the media. Besides this the Americans are IT savvy hence the best method to market India is through online branding and email blasts.
- The print adverts are in "Landscape" format whereas the magazines are in portrait - this creates a problem for the reader.
- A huge part of the spending population in USA consists of NRIs and PIOs. Focus should be present in advertizing India to them too through Indian channels there.
- Element of engagement is missing between trade and Ministry of Tourism, in the current promotional strategy. It is essential to remove that disconnect which is there because it is the trade which connects to the consumer and unless the trade is educated, made familiar with the destinations (its pros & cons), made aware about the new India, it shall be difficult to remove the myth that it is an expensive destination.
- The advertisement content should focus on culture, food, festivals, night life, shopping, star properties/ facilities, yoga and ayurveda to engage more prospective travelers.

Promotional Activities by Other Tourism Boards



- All the present medium of promotions is traditional in nature, whereas, other tourism boards have started marketing through various online media like email blasts, webinars, etc. India is lagging behind in that respect.

- To increase travellers to India, travel agents, who are the direct contacts with travellers planning a vacation, need to be educated about India. Workshops and seminars and in some cases familiarization trips would also help travel agents know about India and recommend India to travellers by alleviating their fears. Many other tourism boards are currently conducting regular webinars and online workshops for Tour Operators and Travel Agents and in some cases also

incentivizing by offering familiarization trips to the travel agents who participate in workshops and webinars.

- A few of the tourism boards have started collaborating with tour operators to send email blasts to their database of clients in an effort to make their marketing more direct. New modes of marketing should be explored by the India Tourism Offices to interest more travellers to visit India.



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



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



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

Chapter Three

PHASE – II

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 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.

3.1.1 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	
USA	955	955

The total number of respondents who were contacted for the survey, in the countries of United States of America, France and Australia, are as follows:

	USA
Completed Sample / Interviews	955
Targeted Respondents for Achieving Sample	8337
Incidence / Hit Rate	11%

3.2 Survey Findings - United States of America

3.2.1 Distribution & Demography of Travelers

The primary survey was carried out among **955 travellers** in United States of America who planned to travel abroad in the coming one year and beyond. The CATI interviews covered 90% (860) of the target group while 10% (95) of in-depth face-to face interviews were conducted by Nielsen research team at the various ports of departure in the United States.

The survey findings were divided into

- Respondents travelling to India - 326
 - Travellers who have not watched the ads - 65
 - Travellers who had watched the ads - 261
- Respondents travelling to other countries and who have watched the ads - 629
 - Travellers who will not change their bookings - 568
 - Travellers who will change the bookings - 61

The following chart gives the final distribution of travellers in the United States of America as per their choice of destinations.

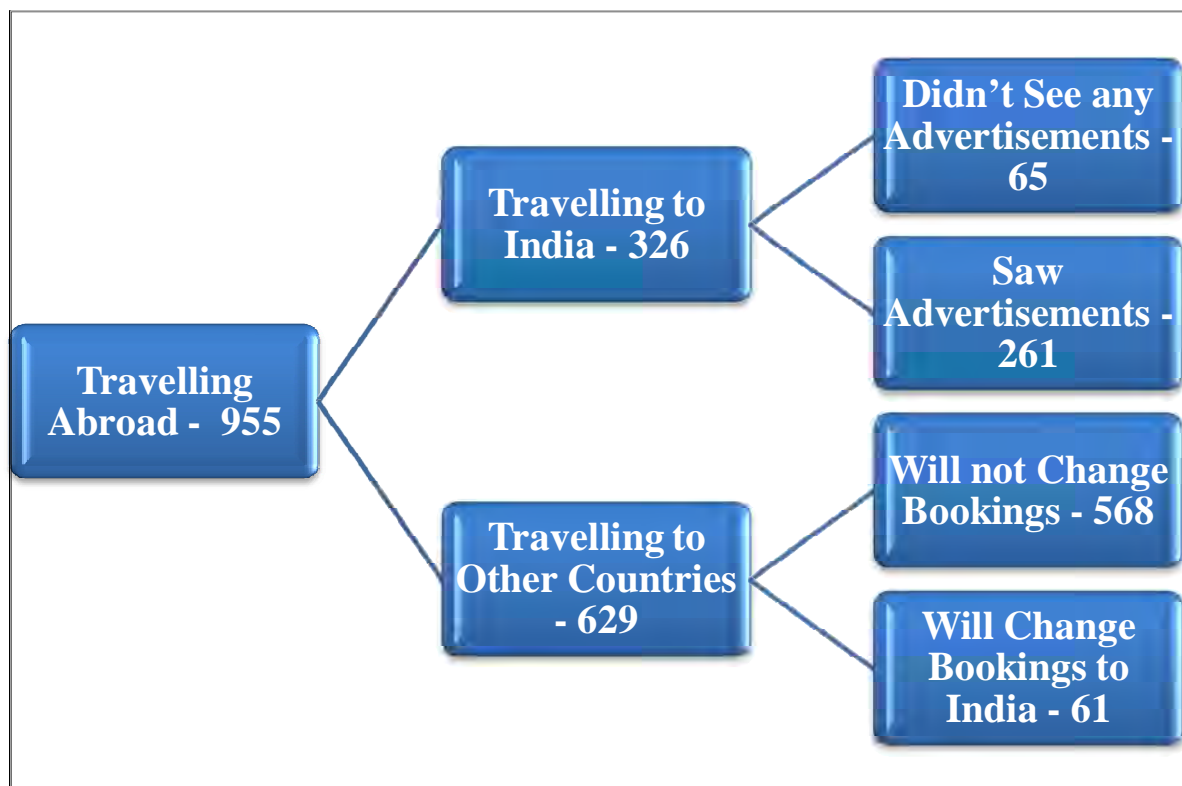


Figure 2.1: Distribution of Travellers

The category of travellers who have not seen the ads but are travelling to India was chosen to find out the motivating factor behind choosing India as the travelling destination. The detailed findings of the survey are presented in the following pages.

i. Distribution of Travellers by City of Residence

The survey was conducted in various cities in the USA, where 35% of the travellers were interviewed in New York, followed by 34% travellers in Los Angeles. In Chicago, interviewed travellers consisted of 26% of total and the rest 5% of travellers belonged to other cities like New Jersey and San Francisco. Out of the total number of travellers interviewed, 5% of the respondents were males and 48% of the travellers were females.



Figure 2.2: City of Residence of Travellers

ii. Age Distribution of Travellers

The age group of outbound travellers from USA is varied between above 18 years, while there were a sizeable number of travellers 19%, in the category of above 61 years who travelled abroad. The survey the target groups were covered began at 18 years and above. The largest number of travellers 26% belonged to the age group of 26-35 years among all the travellers surveyed in USA. This was followed by travellers in the age bracket of 26 - 35 years at 23%.

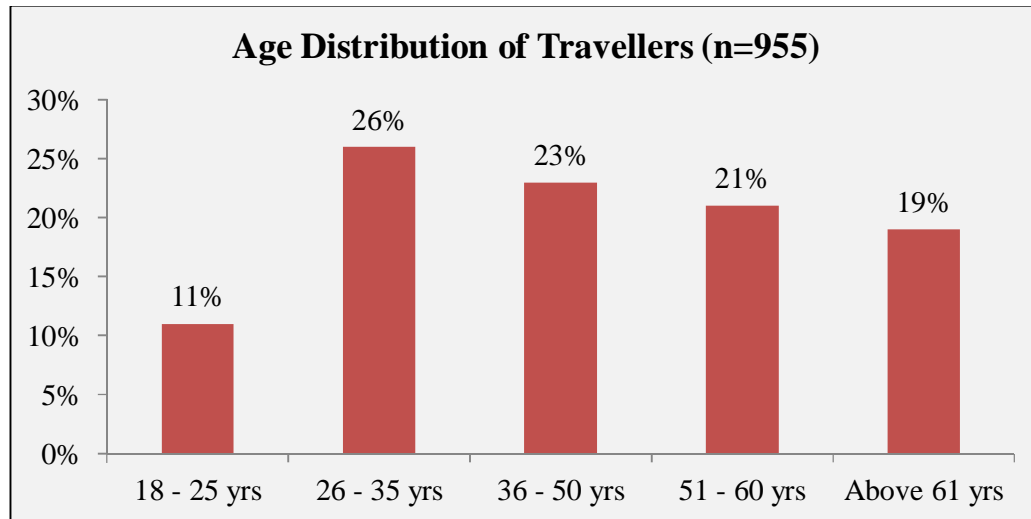


Figure 2.3: Age Distribution of Travellers

iii. Marital Status of Travellers

The number of travellers who were single comprised only 25% of the sample where as the largest group (63%) comprised of travellers who were married and travelled with their families. About 12% of the total respondents were widowed, divorced or separated, etc.

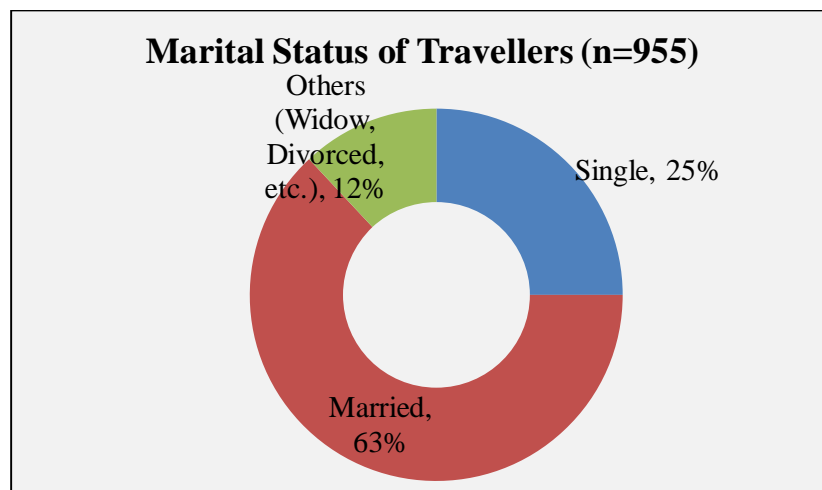


Figure 2.4: Marital Status of Travellers

3.2.2 Advertisement Viewing Particulars

3.2.2.1 Viewership of Any "Incredible India" Campaign

During the present survey, out of the total 955 respondents covered in the USA, 93 % (890) of the respondents said they have watched at least one the Incredible India campaigns in the past few months, while 7% of the travellers had not watched any

advertisement but were still travelling to India. This category of travellers had already decided to travel to India without even seeing the advertisements of any kind.

The survey further found that, out of the 4 print advertisements and 1 video advertisement being aired in the USA, the most viewed (23%) ad was the video ad that was introduced in 2011 of the total number (93%) of viewerships. The second most viewed ad was the Mysore palace ad (21%) closely followed by the “Celestial Ocean” print advertisement (21%). The least viewed advertisement was the print advertisement featuring stags in Corbett National Park (15%).



Figure 2.5: Viewership of Ads by Travellers (n = 890)

3.2.2.2 *Time of Viewership of Advertisement Prior to Interview*

The time of viewership of the advertisements ranged between the most recent as in a few days back to more than a month back. The frequency of viewership was on the higher side with 30% of the respondents (of the 93%) having watched a month back while only 17% of the respondents said they had viewed the ad a few days which was less than a week at the time.

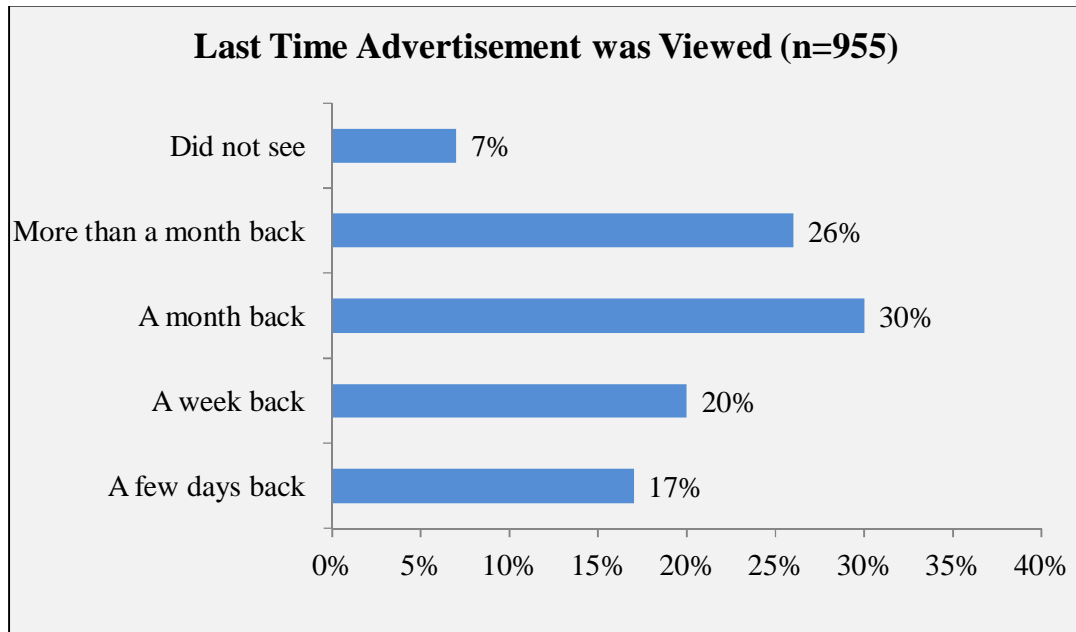


Figure 2.6: Advertisement Last Viewed by Traveller

3.2.2.3 Advertisement Viewing Medium

The survey points out to the popularity and higher prevalence of online medium (37%) in gathering information and choosing of final destinations for travel in the USA (among 890 viewer respondents). About 27% of respondents also made online bookings for future travel. The viewership for print media is the lowest at 20%, which was often cited to be due to lack of time and busy schedules which made it convenient to read, surf and connect online easier. Technology and social media thus, play an important role in influencing traveller opinions and perceptions. Only 8% of the respondents said they were in touch with all the three, print, television and online formats.

Medium of Viewership (n = 890)

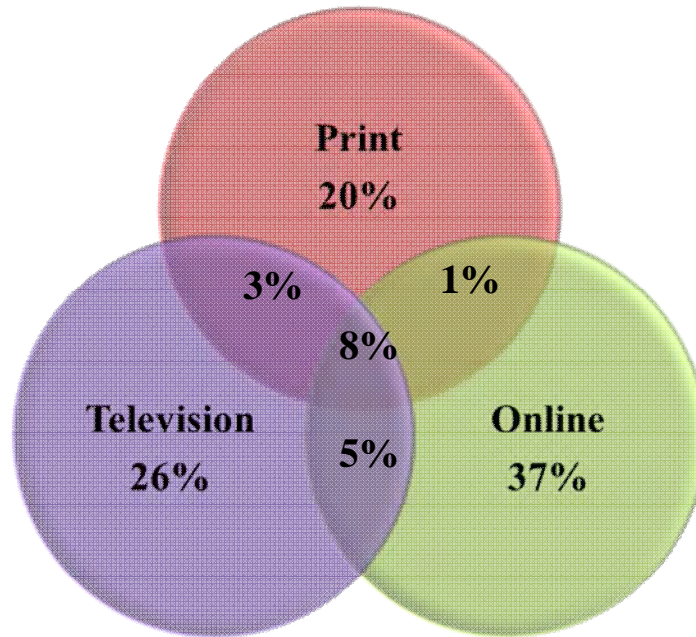


Figure 2.7: Medium of Viewership

3.2.2.4 Most Effective Viewing Medium

Respondents (all 955) surveyed in USA have said television (51%) is the most effective medium followed by the online internet medium (21%). The preference for television as said by respondents is based on the fact that people of all age groups watch television shows in the day with families or friends.

**Most Effective Advertisement Medium – All Travellers
(n = 955)**

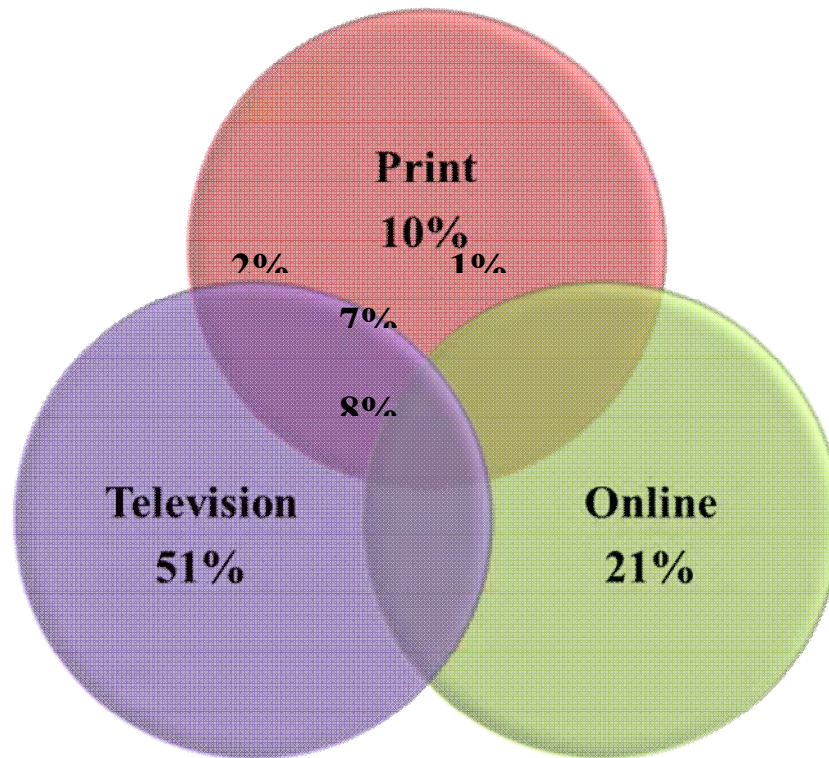


Figure 2.8: Most Effective Viewing Medium

3.2.2.5 Television Channel in which Advertisement was Viewed

In USA, Travel Channel (25%, 319 views) followed by Discovery (15.8%, 202 views) and CNN (15.3%, 196 views), were the channels where the video advertisement was most viewed. Veria Health Channel and Animal Planet were the channels where the video advertisement was least viewed, with only 5.2% (66 views) of total views of the advertisement was reported.

Television Channels	Frequency	Percentage (%)
CNN	196	15.3
CNN Airport Network	75	5.9
CBS	114	8.9
Travel Channel	319	24.9
Discovery	202	15.8
History	158	12.3
Veria Health Channel	66	5.2
Animal Planet	66	5.2

CNBC	84	6.6
Total	1280	100

Source: Nielsen Primary Survey

Table 3.1: Television Channels airing Ads

3.2.2.6 **Print Medias where Advertisement was Viewed**

Amongst all the newspapers and magazines in the USA, 13.9% and 10.9% of respondents said they had seen and read the advertisements in National Geographic Traveller (279 views) and Global Traveller (233 views) respectively. The least viewed print ads were reported from Conference + Meetings World Magazine (1.7%, 37 views).

Print Media	Frequency	Percentage
Harvard Business Review	66	3.1
International Herald Tribune	66	3.1
Conference + Meetings World Magazine	37	1.7
Wall Street Journal Magazine Global	114	5.4
The Economist	93	4.4
Financial Times Worldwide Special Reports	57	2.7
How to Spend It	46	2.2
Global Traveller	233	10.9
Associations & Meetings International	66	3.1
Harper's Bazaar	101	4.7
Forbes Magazine	56	2.6
New York Times Magazine	170	8.0
Washington Post Magazine	66	3.1
Chicago Tribune Magazine	111	5.2
Chronicle Magazine	56	2.6
Robb Report	57	2.7
The New Yorker	150	7.0
Fortune US	74	3.5
National Geographic Traveller	279	13.1
Air France In-flight Magazine	56	2.6
Delta Sky (In-flight Magazine of Delta Airlines)	65	3.1
American Express Publications (Travel & Leisure, Food & Wine, Departures and Executive Travel)	46	2.2
Conde Nast Traveller	64	3.0
Total	2129	100

Source: Nielsen Primary Survey

Table 2.2: Print Media Viewership

3.2.2.7 Online Media where Advertisement was Viewed

Yahoo (16.4%, 280 views), followed by Facebook (15.1%, 258 views) were the websites where the advertisements were most viewed. Eurosports with 5% views (85 views) was the website where the advertisements were least viewed.

Online Media	Frequency	Percentage
BBC.com	244	14.3
Eurosports.com	85	5.0
CNBC.com	204	11.9
LinkedIn	112	6.5
Facebook	258	15.1
CondeNast Traveler	167	9.8
Trip Advisor	167	9.8
Yahoo	280	16.4
You Tube	195	11.4
Total	1712	100

Source: Nielsen Primary Survey

Table 2.3: Online Media Viewership

3.2.2.8 Impact of Advertisements on Decision Making of Travellers

After viewing the print ads, 21% out of 767 respondents have said they will consider India as a destination in their future travels. Respondents who had watched the television ads 33% out of 567 said that they would consider India as a future travel destination. Out of the respondents who viewed the advertisements in the online medium, 31% of 890 respondents mentioned that will be considering visiting India in the future after seeing the advertisements.

The immediate impacts of the ads have been overall positive and encouraging as the following represents. Of the total sample for online advertisements viewership's 63% of respondents out of 890 have been positively influenced by the ads to go to India (12%) and changing their decisions to visit India (51%). Among print viewers, 74% of respondents have been positive influenced while 23% of respondents will be definitely visiting India, while for 51% of respondents the ads have been positively influenced to visit India in the near future. In the case of print media 27% of respondents said the ads have influenced them to visit India, 33% of respondents have said the ads have positively influenced them to consider India as their future travel destination. Respondents watching television reported no negative impact of the ads while 2% each of the respondents said they did not like the ads among the online and print viewership respondents.

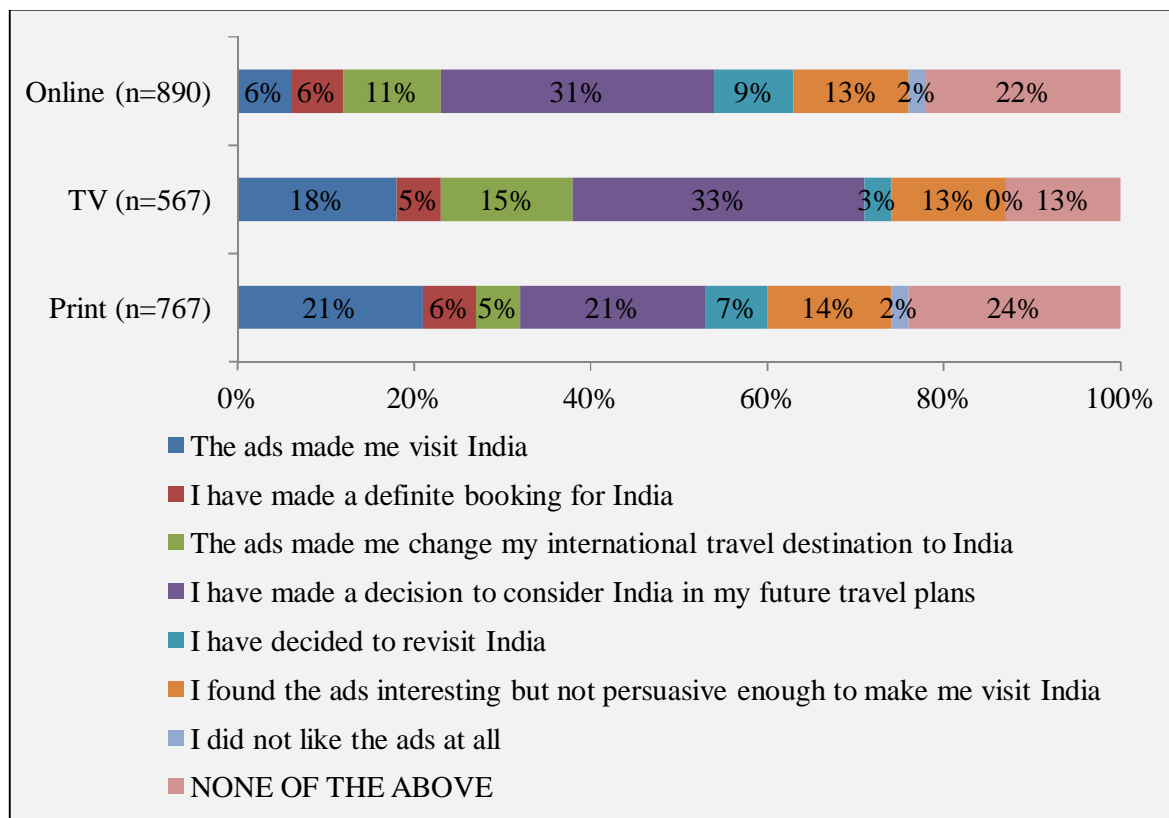


Figure 2.9: Impact of Advertisements on Decision-making of Travellers

i. Impact of Advertisements in Print Media on Travellers Decisions

Out of the total respondents who had viewed the advertisements in the print medium, 21% (out of 767) of travellers visiting other countries have been positively influenced to change their decision to visit India in their future travels. Of the 21% respondents travelling to other countries 18% have decided to consider India as a future destination for travel, while 3% of respondents have already changed their bookings to travel to India after watching the advertisements. 15% (out of 767) of respondents mentioned that they are planning to visit India in the next 1 year and the advertisements have made them choose India as a destination.

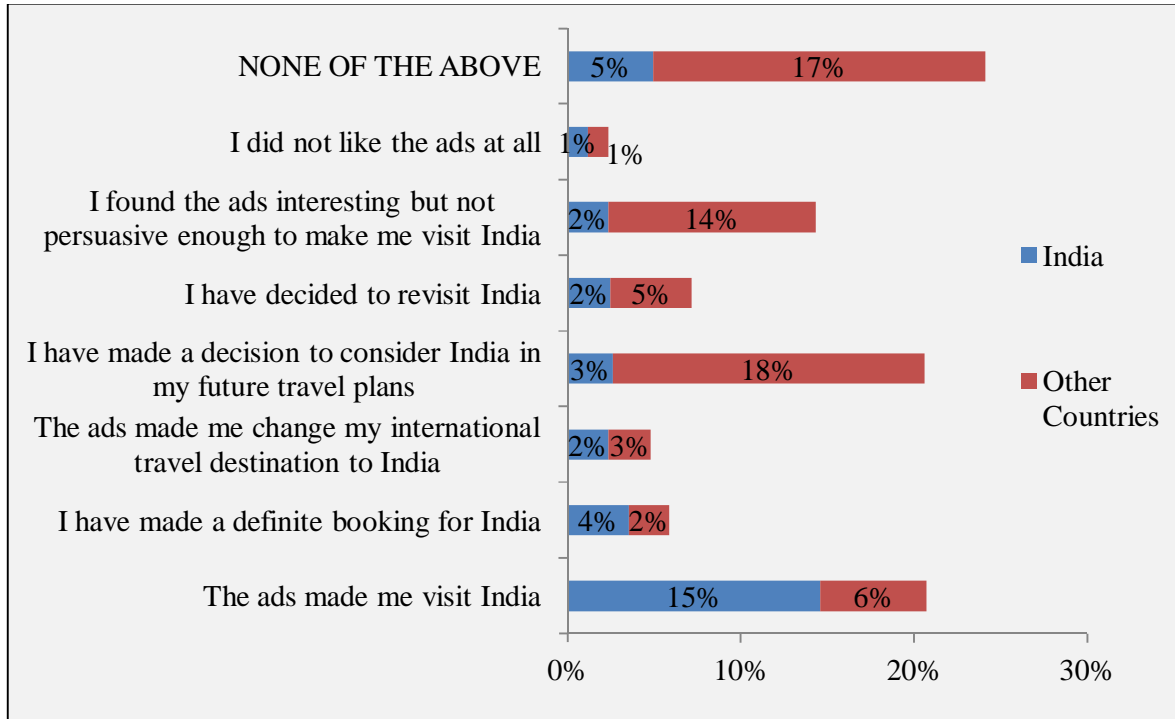


Figure 2.10: Impact of Print Media on Travellers Decisions

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

Out of the total 567 respondents viewing television, 28% respondents travelling to other countries said they will consider India in their future travel plans. 3% of respondents travelling to other countries said the ads made them change their upcoming international travel destination to India. 6% of respondents said the ads have made them visit India.

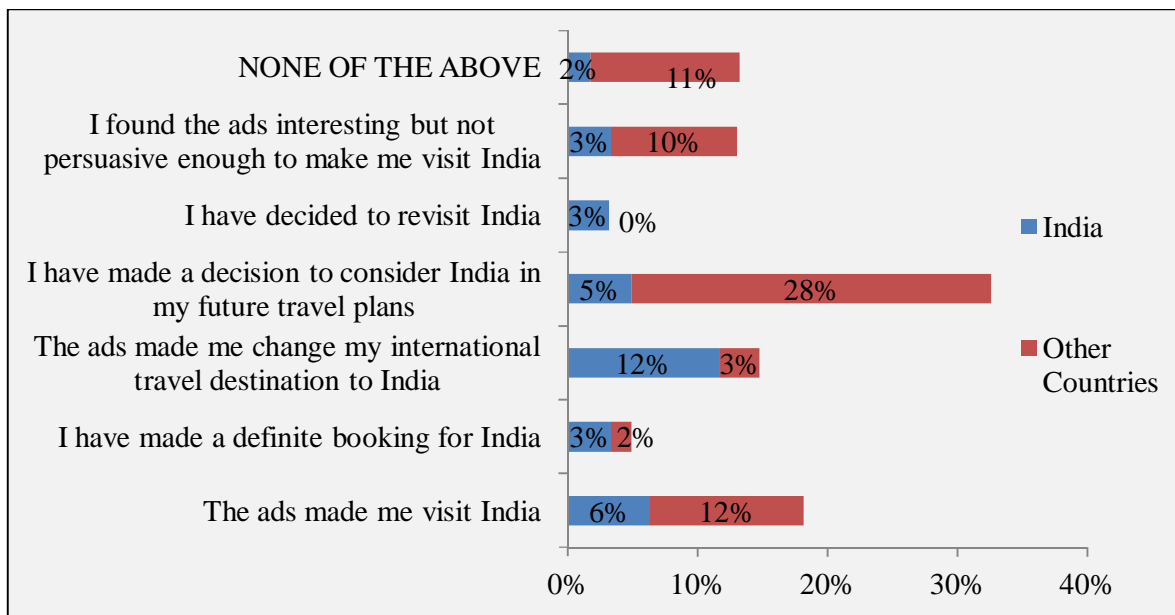


Figure 2.11: Impact of Television on Travellers Decisions

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

6% respondents have been positively influenced to change their international travel destinations to India, while 4% of the respondents said that the ads made them visit India. 24% of the total 890 respondents, who viewed the advertisements in the online media, mentioned that the advertisements have made them consider India as a future travel destination.

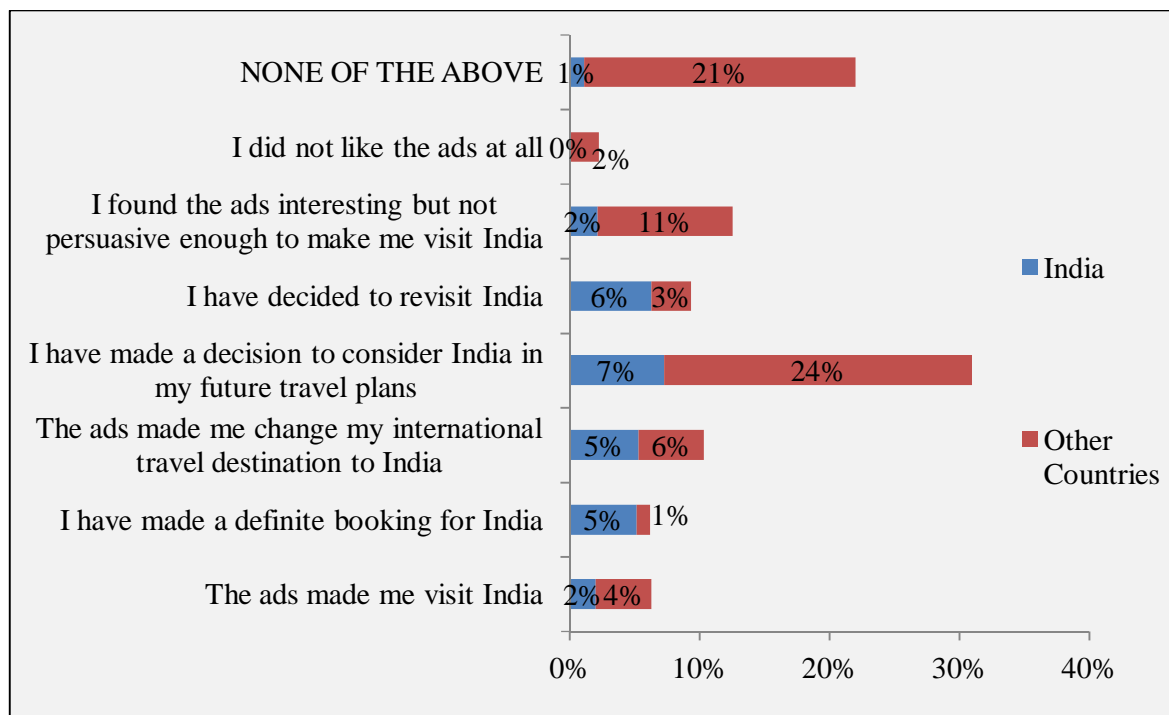


Figure 2.12: Impact of Online Media on Travellers Decisions

3.2.3 Future Travel Particulars

3.2.3.1 Country of Future Travel

Out of the total number of respondents (955) covered for the survey 34% respondents said that they will be travelling to India. Among respondents visiting India, 7% respondents have not seen the ads but have still made bookings to travel to India. While 27% of travellers have seen the ads and they have already made definite plans to visit India in the next one year. The rest 66% of the 955 respondents interviewed, mentioned that they are travelling to other countries within the next one year. Among those not travelling to India in the coming one year, 6% of travellers have changed their international travel destinations to India after viewing the ads, while 60% of respondents are travelling to other countries.

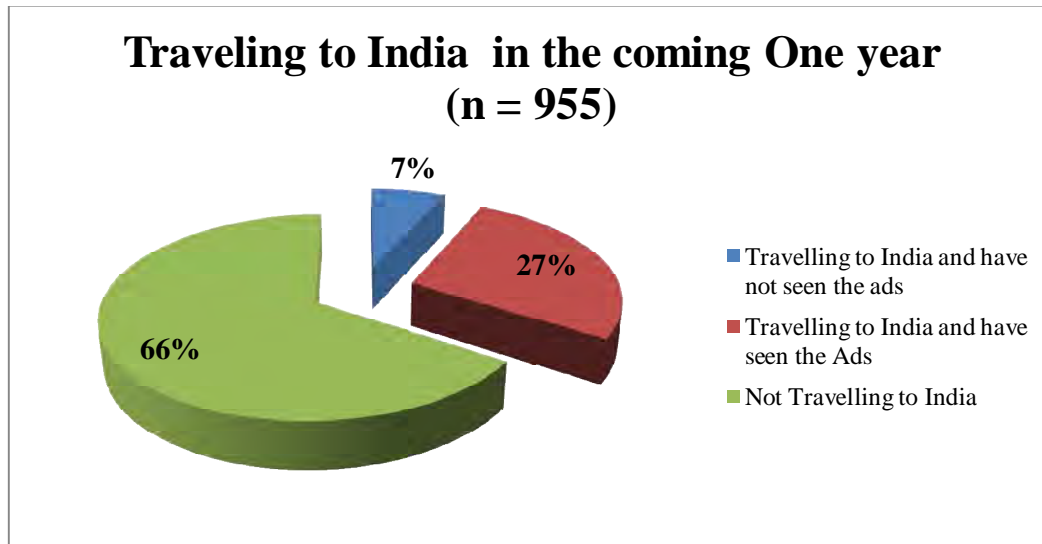


Figure 2.13: Impact of Advertisements and Travel Patterns

Future Travel Destination	Frequency	Percentage
A trip to Ireland and England	9	0.9
AFRICA and ANTARTICA	9	0.9
Africa India	13	1.4
After viewing the beauty of India I must go there	1	0.1
Alaska, Rhine River from Amsterdam to Budapest, Israel	9	0.9
Asia	9	0.9
Australia, Africa	9	0.9
Bali	9	0.9
Brazil	18	1.9
California	9	0.9
Canada	9	0.9
Canada and Caribbean	9	0.9
Cancun, and Costa Rica	10	1.0
Caribbean	20	2.0
Caribbean, France	9	0.9
central America	9	0.9
Chennai	19	2.0
China	10	1.0
Costa Rica	19	2.0
Delhi	27	2.8
Dominican Republic	9	0.9
Dubai	18	1.9
England	9	0.9
Europe	64	6.7
Europe New Zealand	10	1.0

Europe--Italy, France, England Africa--Egypt Asia---India	7	0.7
France	18	1.9
Germany	9	0.9
Greece	18	1.9
Hong Kong , London	9	0.9
I would like to go to India & New Zealand	1	0.1
We are thinking of Europe, but India is a close second. Cost is a factor.	9	1.9
India	160	16.8
India, Asia	9	0.9
India, Italy	9	0.9
Ireland	11	1.2
Israel	9	0.9
Italy	20	2.1
Japan	28	2.9
Kolkata	18	1.9
Mexico	57	6.0
Middle East/Palestine	9	0.9
Mumbai	39	4.1
New Zealand	10	1.0
Panama	10	1.0
Paris London, Italy Rome Florence Hong Kong	17	1.8
Rome	16	1.7
Russia	8	0.8
SOUTH ASIA	10	1.0
Spain, Italy, France	10	1.0
St.Lucia	9	0.9
Surat	9	0.9
TAJ MAHAL & Bangladesh	7	0.7
The Caribbean, Europe, Australia	12	1.3
The Caribbean, California, Europe	10	1.0
The Island, London, and Europe	11	1.2
Ukraine, England, Poland, Italy, Russia, France	13	1.4
Ukraine, India	7	0.7
Vietnam	10	1.0
Total	955	100

Source: Nielsen Primary Survey

Table 2.4: Future Travel Destinations

3.2.3.2 *Reasons for Travelling to Other Countries*

22% of respondents travelling to other countries/destinations out of the total 955 respondents mentioned that they loved the advertisements of the destinations/countries that made them choose to travel there. The second important reason for choosing the destination for the travellers (22%) was that the destination fits their budget.

Reasons	Frequency	Percent
I saw and loved the advertisements of this destination	213	22.3
I have friends / relatives there	138	14.5
It is an Office/ business trip	37	3.9
The tourism products there is very attractive	182	19.1
The destination fits my budget	208	21.8
Visa is not required	18	1.9
The destination has tourism products suitable for my family	65	6.8
Any other	94	9.8
Total	955	100

Source: Nielsen Primary Survey

Table 2.5.i: Reasons for Travelling to Other Countries

Other Reasons	Frequency	Percent
Always wanted to go	9	10
Have wanted to go there for some time	12	14
I have been there before and liked it.	9	9
I want to see the world	9	9
I'VE BEEN AND WANT TO GO AGAIN	9	9
It is next on my list	20	21
There during the war	10	11
Visit family	9	9
Where I want to go	7	8
Total	94	100

Source: Nielsen Primary Survey

Table 2.5.ii: Reasons for Travelling to Other Countries

Other reasons for not travelling to India cited were India was on the list but only after visiting the present destination (19%). Other reasons were respondents (10%) had not got the chance to visit India, although they have wanted to do so for some time.

3.2.3.3 Travelling to India – Without Viewing any of the Advertisements

65 (7%) respondents out of the total 955 respondents interviewed in United States of America, had already decided to travel to India, without having seen the chosen set of advertisements being tested. 42% of the respondents out of total 65 respondents travelling to India said they always wanted to travel to India. The second reason (29%) for visiting India without having seen the advertisements, is that the trip is an official or business trip.



Figure 2.14: Reason for Travelling to India

3.2.3.4 Travellers to Other Countries

Out of total 995 travellers interviewed 629 (66%) travellers have made definite bookings for travel to other countries in the next one year. Amongst these travellers (629), only 10% (61) respondents said that they have decided to change their bookings to India after watching the advertisements. 90% (529) respondents mentioned that they won't change their current bookings in favour of India, but shall consider India in their future travel plans.

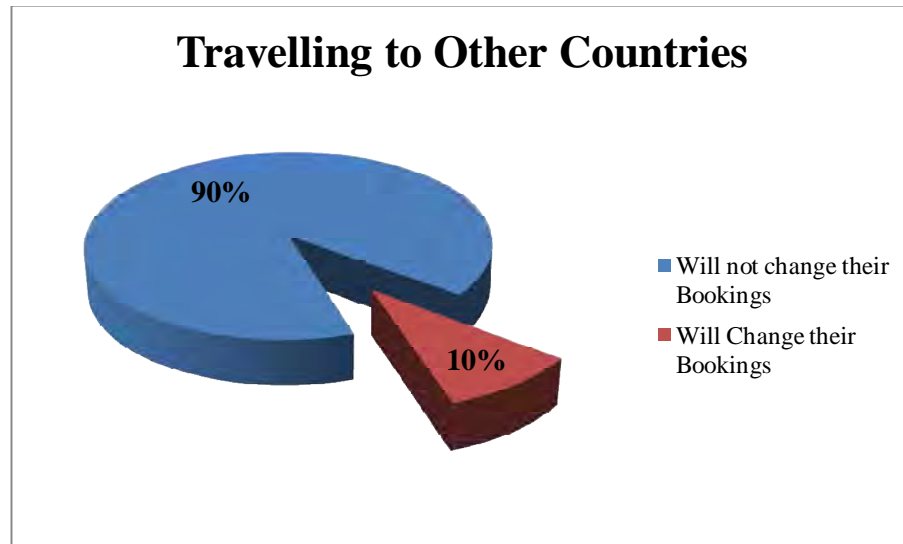


Figure 2.15: Impact on Travellers to Other Countries

The primary reason for not changing travel bookings is that they are happy with the destination and do not want to change (43%). Respondents (11%) also said they need time to visit India, while 18% of respondents are travelling very soon, thus cannot cancel their travel bookings. Similarly, 10% of respondents said changing travel bookings would cost them more money.

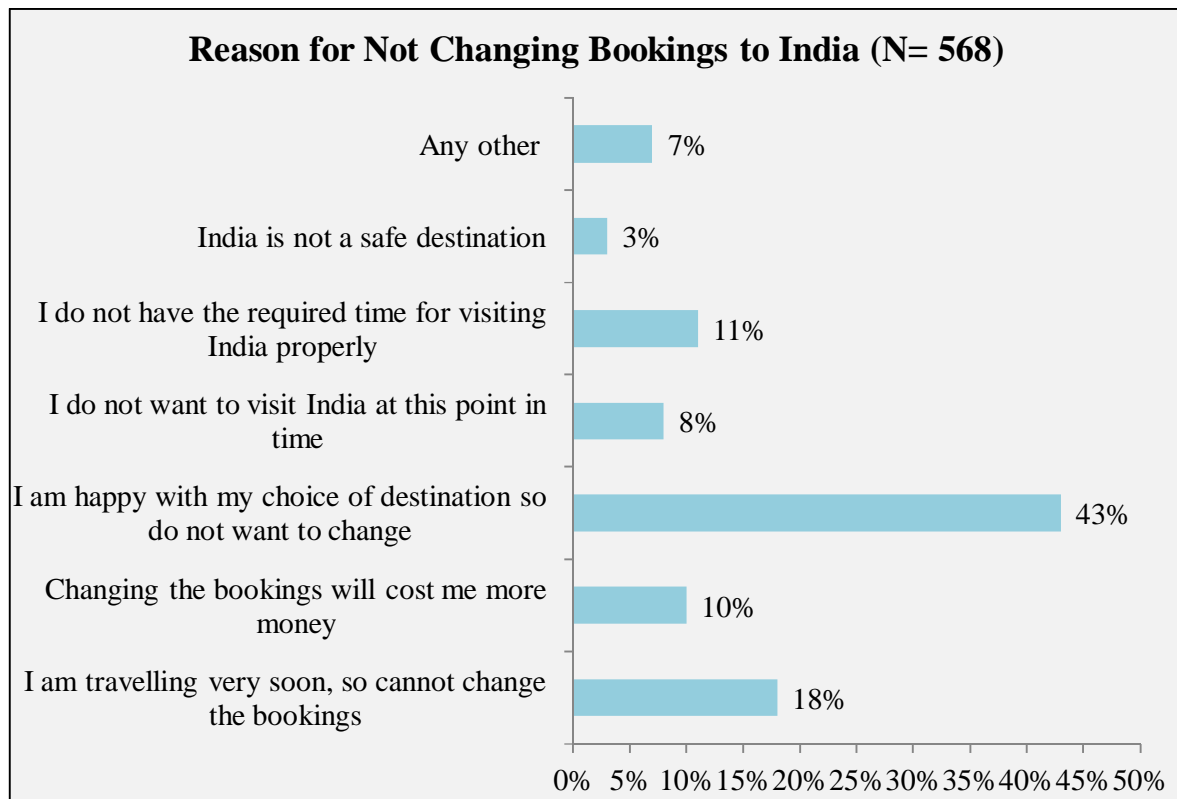


Figure 2.16: Reasons for not changing Travel Bookings to India

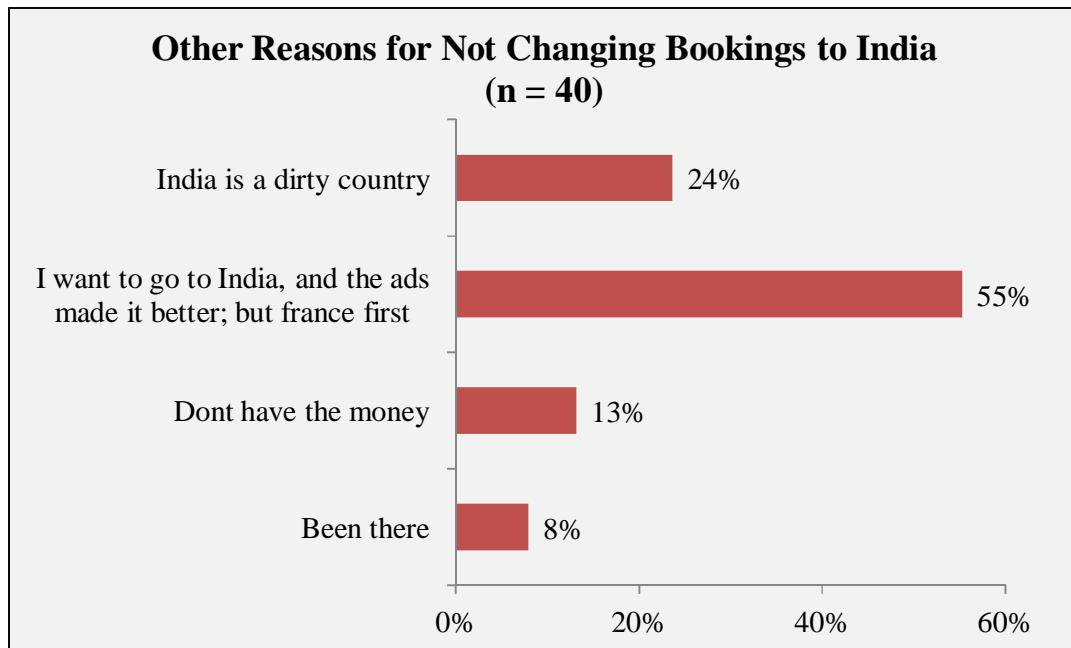


Figure 2.17: Other Reasons for not changing Travel Bookings to India

When probed further some of the other important reasons for not changing bookings to India cited were, India as second on their list (55%), after the country they were presently travelling to, while 24% have a perception that India is a dirty country.

Of the respondents visiting other countries who will not change their present bookings (568), 83% of respondents after viewing the advertisements said that they would consider visiting India in the future.

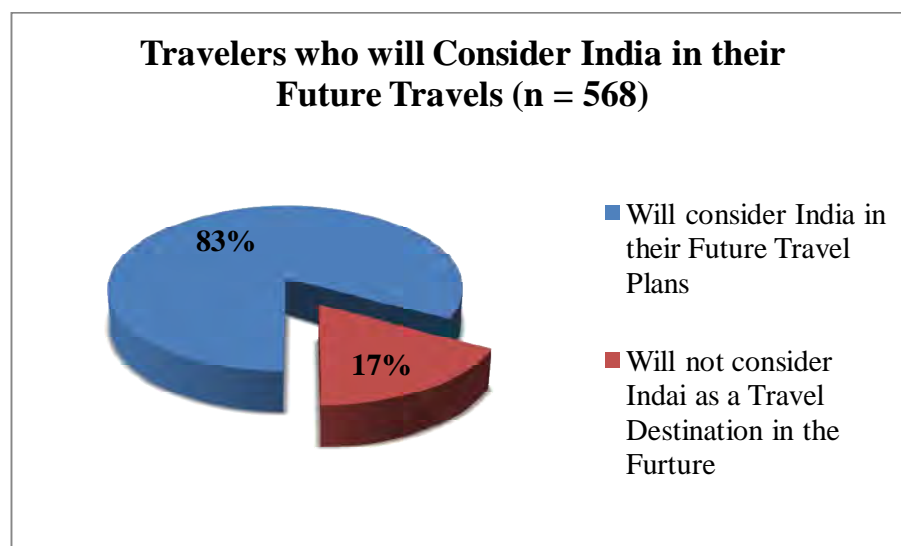


Figure 2.18: Respondents who will consider India in their Future Travels

3.3 Conclusion - Impact of Media Campaigns on Travellers in USA

The *Incredible India* campaigns have been watched on three formats of print, television and online media. The primary survey covered 955 respondents. Some of the key findings of the survey are:

- Key source markets for outbound travel from the US are New York (35%) closely followed by Los Angeles (34%)
- India as a travel destination has been identified by 7% of travellers who are visiting India even without watching the ads, while 27% of travellers have watched the ads and have made definite bookings for India out of the total sample of respondents.
- The ads have positively influenced 6% of travellers among respondents who will change their bookings to visit India in the coming one year. Amongst respondents travelling to other countries (568, 59%), 49% of respondents have mentioned they will consider India as a travel destination in the future
- Respondents (43%) travelling to other countries were reluctant to change their travel bookings since the destination they were visiting is on their priority list and they have wanted to visit the destination for long. Respondents mentioned the advertisements were appealing, but they do not have the time to change their travel bookings which would cost them more.
- Travel bookings are made a minimum of three to six months in advance, including airfare, accommodations, etc; hence last minute cancellations and bookings are an extra cost not affordable to many respondents.
- Respondents have the perception that India is a dirty country and hygiene is thus one important reason for not visiting India. According to respondents the socio-cultural and standard of living in Europe is similar to theirs thus, making it a natural choice for travel to these countries.
- Of all the three Medias, respondents from the USA said television (51%) followed by online media (21%) were the best channels of communication with people, although the survey pointed out higher hits for Incredible India campaign ads online (37%) followed by Television (26%). The latest video is the most watched (23%) ad campaign in the USA.
- The impact has been positive although it has not immediately translated into travel bookings to India. 18% of respondents travelling to other countries from the print media have said they shall consider India for their future travel plans, while 3% of respondents have changed their travel bookings after watching the ads. In the television and online media 28% & 24% of respondents said they will consider India in their future travel plans, while 6% and 3% of viewers respectively, have changed travel plans after watching the ads. The content of advertisements respondents said was appealing but not persuasive enough to change their travel plans.

- Respondent's perceptions of Indian travel destinations are limited to India being limited to the Golden Triangle and Kerala. The most identified monument being the Taj Mahal.
- The coverage and ranking of India as a must see destination in the print and visual medias, state information and tour operators guilds besides the Incredible India campaigns is limited. The information flow on Indian destinations and diversity in culture other than the campaigns is negligible.

CHAPTER FOUR CONCLUSION & RECOMMENDATIONS

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

4.1 Recommendations

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

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

respondents prefer travelling during the Christmas in the winters when they have a number of days in hand. Similarly, French prefer travelling during August to September and during Christmas. Australians prefer travelling during August to December. The ads thus have to be aired aggressively from March to June to influence traveller decisions.

4. 39% of outbound trips in the USA are for leisure/recreation/holiday, while the top leisure activities include visiting historical places, visiting small towns and villages, sightseeing and touring the countryside and visiting cultural heritage. The promotional campaigns should be able to capture the imagination of the tourist by promoting the multi-dimensional and diverse socio-cultural milieu in India. **Exploring and Experiencing India** through **Adventure** could be the themes for promoting lesser known destinations of the North-East, Chhattisgarh, Sikkim, etc. The ads should also focus on the architecture, archaeology and heritage as other themes that respondents said they would be interested to visit in India.
5. The age group of travellers varies from 18 years and beyond. There is a sizeable population of above 61 years travelling to India from the USA (19%), Australia (31%), and France (22%). The needs and purpose and consumption patterns of travellers thus varies with age. Key targets groups should be identified as per needs and ads should be accordingly aired. The advertisements while promoting India as an interesting destination should also convey the appropriateness of India as a travel destination to all age groups.
6. The food and cultural heritage of different parts of India should be promoted to give information on the diversity and richness of Indian culture and heritage.
7. People in countries of France, America and Australia are geographically and culturally separated, distinct and diverse communities in comparison to India. India's image is thus, differently placed in the psyche of people in all the three countries. The most common perception/myths aired by interviewees are India's poverty and concerns for health & hygiene conditions in the country. The media advertisements should thus be prepared keeping these in mind showcasing the infrastructural and economic development taking place in the countries. Documentaries, short films or five to ten minute videos showcasing the same can be aired to meet the expectations of prospective tourists.
8. 51% of American outbound tourists are women. A large chunk of our respondents (48%, USA and 45%, France) being women, safety and security was an oft-repeated theme of discussions during interviews. The ads should also convey a sense of safety and well-being to prospective tourist who could be travelling to India alone or with families.

9. India is not considered as hassle-free destinations as respondents cited less information on modes of travel and accommodation available or conveyed through these ads. There is a need to bridge the gap with specific adequate information on easy to access transport and grades of affordable accommodation suitable to different budgets at various sites being promoted and special features with respect to each of these sites and destinations.
10. On the other hand, India is considered as an extensive leisure destination, where respondents wanted to spend longer periods visiting different regions at a stretch at leisure. The notion of leisure travel that is being promoted should be thus strengthened to give a positive impression of the various leisure activities available.
11. An important source of information, which influences travellers decisions to travel abroad is word-of-mouth assurances/appreciation and experiences shared by friends and relatives travelling to that particular destination. Respondents from Australia shared their views of Vietnam, Bali, Cambodia which had been conveyed by friends and relatives who had previously visited these destinations. The India tourism offices and the Ministry of Tourism should give higher emphasis to improve the tourist experience and nature of propaganda generated from visits.
12. The primary survey and in-depth interviews in all the three countries have pointed out to information gap about India, other than the campaigns and related activities being carried out by the India Tourism offices. The neutrality of local media and state information boards does not position India as a prime or must see destination. In order to generate greater interest and positive visits to the country, the Ministry of Tourism through its various tourism offices should liaise and lobby with the local media and host nation tourism departments to promote India as a must see destination. The Ministry should also promote and liaise with international tourism bodies such as UNWTO, WTTC, ITB, etc to strengthen India's standing and ranking in the international market.
13. UNWTO highlights 2011 points to localized regional or inter-continental travel in the rise in the world due to recession and changes in geo-political situations in past half decade. The campaigns thus should also be targeted to India's neighbours China and South-East Asia. China has shown incredible growth in inbound as well as outbound (18.5% CAGR for 2000-2010⁴) tourist travel. The campaigns thus, should also target prospective growth markets in addition to traditional source markets of Europe and America.

⁴ China Outbound Tourism, HVS Global Hospitality Services, 2011