India is one of the world’s fastest growing outbound travel markets, with the United Nations World Tourism Organisation (UNWTO) predicting 50 million outbound travellers by 2020. The India 2020 Strategic Plan was developed to maximise the tourism potential offered by India and to set the foundation for the future, when long haul leisure travel from India becomes more common. Launched in June 2012, at the Australian Tourism Exchange, the India 2020 Strategic Plan was developed by Tourism Australia in collaboration with industry and government stakeholders. It is a key deliverable of the Tourism 2020 ‘Grow Demand from Asia’ strategy, recognising India’s role in driving tourism growth in this ‘Asian Century’. The Tourism 2020 Strategy identifies that India has the potential to be worth between A$1.9 billion and A$2.3 billion by the end of the decade.

The plan identifies four strategic pillars that are pivotal to being competitive and winning market share in India:

1. Knowing the customer
2. A dedicated geographic strategy
3. Delivering quality Australian tourism experiences
4. Building aviation and access

Since the launch of the plan, leisure spend and arrivals from India have grown by 22 per cent and 16 per cent respectively. India is one of Australia’s fastest growing inbound markets and now sits amongst the top 10 source markets for Australian tourism. Visitor numbers to Australia from India grew 7.5 per cent in 2012, reaching 159,400 for the year, and worth A$786 million in overnight expenditure.

INCREASED RESOURCING

Tourism Australia doubled its marketing spend in India during 2012/13. More than 90 per cent of these funds were allocated to activities to directly reach our target customer, to generate demand, build aspiration and improve Australia’s attractiveness as a leisure holiday destination.

Sources:
1. Australian Bureau of Statistics, overseas arrival & departures
2. International Visitor Survey (Tourism Research Australia)
1. KNOWING THE CUSTOMER STRATEGY

Knowing the target customer is the foundation for all Tourism Australia marketing activity. To help Australian tourism achieve its Tourism 2020 goals, an in-depth understanding of the target customer is vital.

<table>
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<tr>
<th>STRATEGY</th>
<th>PROGRESS SNAPSHOT &amp; HIGHLIGHTS</th>
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<tbody>
<tr>
<td>• Identify and target Indian consumers that are predisposed to travel to</td>
<td>• Australian Consumer Demand Research completed amongst potential long haul travellers from India, identifying the ‘triggers’ and experiences important to the consumer when selecting a holiday destination, and results shared with industry</td>
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<tr>
<td>Australia and who will do more and spend more when they visit</td>
<td>• Completed research to improve understanding of the travel needs and behaviours of target customers – a foundation for refining marketing activity, product development and media mix</td>
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<tr>
<td>• Undertake research to gain insights into the Indian target customer</td>
<td>• Campaign Activity Evaluation research revealed high reach, with 91 per cent of the target audience having seen it, and the same number taking some action to travel to Australia</td>
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<td>including:</td>
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<td>• economic potential</td>
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<td>• travel motivations</td>
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<td>• preferred distribution and media channels</td>
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<td>• desired tourism products and experiences</td>
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<td>• Use and share research insights with government and industry to drive</td>
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<td>targeted marketing communications, inform product and experience</td>
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<td>development and to improve media efficiencies</td>
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WHO IS THE TARGET CUSTOMER?

LEISURE

• Affluent couples - men and women who are amongst the wealthiest of India’s population, who live in Delhi and Mumbai, with a secondary reach into the cities of Chennai, Hyderabad, Bangalore and Kolkata.

• Experienced and evolved travellers with an independent travel mindset, who want to explore and experience nature and scenic beauty.

BUSINESS EVENTS

• Business Events travel agents based in the cities of Mumbai and Delhi.

• Indian corporate meeting decision-makers from industry sectors such as direct selling, pharmaceutical, healthcare, fast moving consumer goods (FMCG), insurance and banking.

• Indian event management companies.

GAINING INSIGHTS INTO THE INDIAN TARGET CUSTOMER

TARGET CUSTOMER RESEARCH IN INDIA

Tourism Australia is undertaking a dedicated consumer research project into the long-haul travel behaviour and preferences of Australia’s target leisure travel customers in India. The research will assist the Australian tourism industry in improving its understanding of what drives Indian leisure travel decisions. The findings of the research will be shared with government and industry stakeholders in the second half of 2013.

AUSTRALIAN CONSUMER DEMAND RESEARCH FINDINGS

A major tourism research project into how Indian consumers view Australia and what most motivates them to visit was undertaken by Tourism Australia. The research surveyed Indian consumers, who were selected on the basis of their previous long haul travel behavior and/or their intention to travel long haul in the next few years. Research highlights include:

• Australian beaches, wildlife, island experiences, rainforests, the Great Barrier Reef and major Australian cities had the most appeal for Indian travellers.

• Sixty-eight per cent of Indians said that they would use a general internet search as a preferred source when planning a trip to Australia; whilst 43 per cent would use a travel agent to book their Australian holiday.

• Indian visitors ranked amongst those with high expectations and satisfaction from their visit to Australia.

• Australia ranked number one on Food & Wine amongst those Indians who have previously travelled to Australia.

• Indians also showed the highest intention to visit Australia for a holiday amongst Australia’s 11 key competitive, long haul tourism markets.

• Most Indian travellers preferred the months of November and December as the most likely time of the year to take a holiday to Australia.
CONSUMER MARKETING

THERE’S NOTHING LIKE AUSTRALIA LAUNCH, AUGUST 2012

In August 2012, and for the first time ever, Tourism Australia launched its global brand campaign, There’s nothing like Australia in India. In addition to broadcast and print advertising, the campaign also featured a strong digital and out-of-home focus. The media buy was concentrated on the major cities of Delhi and Mumbai. Campaign partners to date have included Destination New South Wales, South Australian Tourism Commission, Tourism Victoria, Tourism and Events Queensland, Singapore Airlines/Silk Air, Malaysia Airlines and key Aussie Specialist Agents.

Brand Content Creation

Tourism Australia produced the ‘Destination Vignette’ campaign showcasing Sydney, Melbourne, Great Ocean Road, Gold Coast, Great Barrier Reef, Kangaroo Island and Uluru through 60 second programs, which aired across 12 television channels.

MASTERCHEF AUSTRALIA

Aired on India’s leading lifestyle channel, Star World, Masterchef Australia is amongst the highest viewed reality shows in India and enjoys a prime-time viewership with Australia’s target customer. Tourism Australia has been the presenting sponsor for this program in India, with the camaraderie between the participants and judges helping to build Australia’s image as a welcoming destination, with warm and friendly people.

INTERNATIONAL MEDIA HOSTING PROGRAM (IMHP)

As a part of the International Media Hosting Program, Tourism Australia hosted renowned freelance travel journalists, travel magazines, social influencers, regional and broadcast media. A total of 17 media visits to Australia were organised in the past year, covering broadcast, print, and new media. This included visits by specialised Business Events media. Some of the IMHP highlights since the launch of the India 2020 Strategic Plan include: the visit of Vir Sanghvi, eminent food critic and editorial director for Hindustan Times, to Sydney and Hamilton Island; popular travel show ‘10 Things To Do Around The World’ on NDTV Good Times with a total of 24 episodes filmed in Sydney and Adelaide; travel magazine Lonely Planet’s extensive feature on Tasmania, and popular Hindi news channel Aaj Tak capturing a well-known Indian TV celebrity couple’s real life honeymoon in Australia. Conde Nast Traveller, India edition, featured Australia’s Food & Wine on the cover of their August 2012 issue. In addition, two prominent publications, Business India & MICE Talk were invited along with a corporate familiarisation to experience and showcase Australia’s Business Events capabilities.

BEGIN YOUR JOURNEY
OF LOVE IN AUSTRALIA

Love will bind you together for a lifetime, but special romantic getaways form unforgettable moments of your relationship. Whether you are newly-weds, or just looking to share memorable couple-time away from home, Australia is your ideal destination for romance.

Rendezvous with one of nature’s greatest wonders, the Great Barrier Reef

A2 record-setting the private image of a viewpoint high observation deck on the border of the Great Barrier Reef, where you can visit the Reef and you can swim with the fish. A close interaction with the activity including some of the most popular snorkeling and diving, a helicopter ride over the Great Barrier Reef. 

AMWAY INDIA LEADERSHIP SEMINAR

The largest ever Business Events delegation from India travelled to Melbourne in December 2012, with more than 4,000 delegates from Amway India participating in their annual leadership seminar. During the five-day visit, the delegation contributed approximately A$21 million to the Australian economy and 21,000 hotel room nights to the local tourism industry.
2. GEOGRAPHIC STRATEGY

Prioritising and focusing resources in key primary cities will enable Tourism Australia to maximise growth opportunities in India.

**STRATEGY**
- Identify the primary cities where resources should be prioritised to take advantage of India’s potential for the Australian tourism industry
- Implement roll-out of Tourism Australia’s marketing in these key markets
- Review the geographic strategy at key intervals to ensure effectiveness as the market evolves

**PROGRESS SNAPSHOT & HIGHLIGHTS**
- Key primary and secondary markets identified with 90 per cent of consumer marketing focused on Delhi and Mumbai
- Distribution work actively focused on the six identified priority cities - Mumbai, Delhi, Chennai, Hyderabad, Bangalore and Kolkata
- 2012-13 India Annual Operating Plan developed in alignment with the India 2020 Strategic Plan
- Stakeholders onboard - geographic strategy shared with industry and government partners

Tourism Australia has implemented a tightly focused Geographic Strategy, based on an assessment of aviation, visa access, economic and demographic research, and stakeholder feedback on the top 50 cities in India which highlighted that household wealth is highly concentrated in particular regions in India and will remain so.

In the short term, the focus for Tourism Australia will be on Delhi and Mumbai, ensuring marketing and distribution activities are optimised. By focusing resources on these two major centres, Tourism Australia expects better marketing cut through and greater impact. The four additional cities of Chennai, Hyderabad, Bangalore and Kolkata have been identified for possible targeted marketing activities and strengthening of distribution networks. Tourism Australia will also build the strong network of Aussie Specialist agents in these cities.

The Geographic Strategy will be reviewed over time to look at opportunities beyond these initial six cities. It has also been used to inform the Knowing the Customer work and distribution activity as part of the Quality Australian Experiences Strategy.

3. QUALITY AUSTRALIAN EXPERIENCES

High quality tourism experiences and a strong base of Aussie Specialists will set the foundation for Australia’s competitive advantage.

**STRATEGY**
- Develop and deliver high quality tourism experiences
- Build a robust distribution network of Aussie Specialist agents to promote these experiences
- Encourage tourism operators to increase their understanding of Indian culture and consumers to deliver high quality products and services

**PROGRESS SNAPSHOT & HIGHLIGHTS**
- New products and new destinations introduced including: Luxury Lodges of Australia and Self Drive, Tasmania, Uluru and South Australia. These products and destinations were promoted as a part of the training programs organised in partnership with State and Territory Tourism Organisations
- Improved service delivery. Some hotel chains e.g. Accor have introduced optimum service standards, training staff to better deliver on the expectations of Indian visitors
- India Mega Famil & Workshop, held in September 2012, highly positive feedback and high satisfaction ratings from all delegates
- Growth and development of Aussie Specialist and Premier Aussie Specialist agents. A total of over 2,700 agents registered as of April 2013, an increase of 50% on the previous year and already exceeding targets for the 2012-13 financial year
- Trade development programs delivered to over 700 frontline staff of travel agencies in the six target markets, in partnership with State and Territory Tourism Organisations (STO’s) and Inbound Tour Operators

In the past 12 months, Tourism Australia has worked with industry and STO partners to introduce new products into the India market, including self-drive and luxury experiences, as well as new destinations such as Tasmania and South Australia.

Partnership marketing with leading Premier Aussie Specialist agencies such as Kulin Kumar, Mercury, Makemytrip, Yatra and with airline partners Singapore Airlines and Malaysia Airlines has increased the visibility of Australia in the Indian marketplace, and driven the promotion of new products and experiences.

Complementing this, Tourism Australia has continued to develop the capability of travel sellers through training events like the India Mega Famil and Workshop to ensure the travel distribution channels in India are well-equipped to cater to Indian travellers looking to holiday in Australia.
India’s top selling travel agents for Australian holidays visited Melbourne as part of Tourism Australia’s six-day India Mega Famil and Workshop (IMFW) 2012. Held from September 1 – 6, 2012 at the Melbourne Convention and Exhibition Centre (MCEC), the IMFW provided a platform to showcase quality experiences and Australian tourism products to the participating Indian agents. Sixty-four Australian tourism products met with delegates from 66 Indian travel agencies during the event. The event featured one-to-one meetings between the Indian and Australian delegates and a familiarisation program. As well as this, a dedicated program to showcase the greater Melbourne region through overnight stays was also a core part of the event schedule. Australian cricketing great, Brett Lee, who recently joined Tourism Australia’s ‘Friends of Australia’ advocacy program, attended the farewell function of IMFW 2012 and enthralled the participating Indian delegates with a personalised tour of the Melbourne Cricket Ground.

4. AVIATION DEVELOPMENT

A sustainable aviation environment is critical to the success of the India 2020 Strategic Plan. Approximately 345,000 additional seats are required on the route by the end of the decade. Tourism Australia will continue engagement with existing and potential carriers to build capacity and develop suitable air services.

STRATEGY

- Partner with airports, States and airlines to facilitate commercially sustainable aviation capacity. Focus on:
  - Collaborating with South East Asian carriers and building capacity through their respective hubs
  - Undertaking cooperative marketing initiatives with aviation partners
  - Continuing to support developments on nonstop direct services

PROGRESS SNAPSHOT & HIGHLIGHTS

- Launched cooperative marketing campaigns with Singapore Airlines/SilkAir and Malaysia Airlines
- Participation of five airline carriers at India Mega Famil and Workshop 2012 to promote their connectivity into Australia, through their respective hubs
- Continue to support airports and State and Territory Tourism Organisations in their efforts to facilitate Air India’s proposed direct flights

Working more closely with key carriers on the routes between India and Australia (including Singapore Airlines/SilkAir, Virgin Australia, Malaysia Airlines and Qantas) has been a key deliverable of the strategy in the last 12 months. Increased partnership marketing and participation in Tourism Australia events by airline partners has provided greater alignment and benefits for Australian tourism. In addition, Tourism Australia continues to support talks with Air India on the airline’s proposed direct flights to Australia.
PARTNERSHIPS

Strengthening partnerships with the Department of Foreign Affairs and Trade (DFAT), Department of Immigration and Citizenship (DIAC), Austrade, other government agencies and industry will be integral as Tourism Australia progresses to achieve the Tourism 2020 India goal.

PROGRESS SNAPSHOT & HIGHLIGHTS

- Visa deregulation and simplification. Training on changes provided to Aussie Specialists agents participating in the Preferred Agency Scheme (PAS) program
- Participation in Oz Fest – the biggest Australian cultural festival ever staged in India
- Ongoing partnership development and stakeholder communications in Australia and India
- Strong bilateral government to government relationship with India
- Participation in Australia India CEO Forum. A high-level dialogue for business leaders and government, to drive and strengthen the bilateral relationship between India and Australia
- Participation in Investment Roundtable. Indian Hotels Company Limited (Taj Group of Hotels), Oberoi, InterGlobe, Lalit, amongst others in attendance

STRATEGY

- Continue to expand and strengthen partnerships with DFAT, DIAC, Austrade, and other government agencies and industry to provide a strong foundation for Australian tourism’s presence in India

OZ FEST

Tourism Australia was the Gold Partner for Oz Fest - the biggest Australian cultural festival ever staged in India. An initiative of the Australian Government along with 24 partners from government and business, Oz Fest was held from October 2012 to February 2013. It provided an opportunity for Indians to experience the vibrancy and innovation of Australia’s contemporary culture and understand its diversity, creativity and outward-looking focus in this ‘Asian Century’.

During Oz Fest, The Hon Simon Crean MP, conferred the Order of Australia to Indian cricket legend, Sachin Tendulkar, for his service to Australia-India relations by promoting goodwill, friendship and sportsmanship through the sport of cricket.

In the past 12 months, Tourism Australia has continued to work in partnership with key government agencies on initiatives such as the Australia India CEO Forum, where Tourism Australia Chairman, Geoff Dixon, met with Indian Prime Minister Manmohan Singh to promote bilateral relations, and the Investment Roundtable, which was organised with Austrade to attract leading Indian hotel chains to invest in tourism infrastructure projects in Australia.

Working in partnership with DIAC, Tourism Australia has also conducted education sessions on the new label-free visa program, introduced in October 2012. The events also included refresher training activities for Aussie Specialist agents participating in the Preferred Agency Scheme (PAS) Program.

NEXT STEPS?

The India 2020 Strategic Plan forms the basis of Tourism Australia’s annual operating plans, and we will continue to work with key stakeholders, industry and governments around Australia on the road to 2020. The plan for 2013/14 continues the roll out in line with this strategy.

WANT TO KNOW MORE?

For more detail, please contact the International Operations team in Sydney

CONTACT:
Monica Armesto
Email: marmesto@tourism.australia.com
Phone: +61(2) 9361 1264

For media enquiries, please contact the Corporate Affairs team in Sydney

CONTACT:
Leo Seaton
Email: lseaton@tourism.australia.com
Phone: +61(2) 9361 1363

Tourism Australia's corporate site www.tourism.australia.com/ssea contains information on the market and the Indian consumer. Updates on Tourism Australia activities and the India market are published in Tourism Australia’s industry newsletter, Essentials.