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Partnership with Conde Nast  
Page views: 853k  
EAV: A\$ 170k



*Vogue - March 2019*  
cover shoot with Anushka Sharma,  
in partnership with Visit Canberra  
EAV: A\$ 780k

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Leveraging FOA,  
Harsha Bhogle's  
visit  
Reach: 11 Mn

# The Airline Marketplace

- Industry-first initiative with 8 airlines to offer compelling reason to visit Australia
- Amplified by Online Travel Agents and Banking Partner
- Campaign optimised over the years
- Over 85,000 bookings during the five phases
- Australian industry invited to be a part of the marketplace
- Now extended to other South East Asian markets

**FIVE AIRLINES. ONE EPIC DESTINATION**  
**THE GREAT AUSTRALIAN AIRFARE SALE IS BACK!**

With these unbeatable airlines, don't let anything stop you from heading to Australia for the most unique holiday yet. Get ready for unmatched natural beauty and wildlife, spirit of adventure or the an hidden secrets found far off the beaten track and boundless excitement everywhere.

<b>AIRASIA</b> From <b>₹25,000*</b> *Excludes of Insurance, Taxes and Fees www.airasia.com	<b>QANTAS</b> Start in Auckland From <b>₹43,300*</b> *See details of Australia with Cruise, Explorer fare www.qantas.com	<b>malaysia airlines</b> From <b>₹45,800*</b> www.malaysiaairlines.com
<b>JET AIRWAYS</b> From <b>₹47,600*</b> www.jetairways.com	<b>INDIGO AIRWAYS</b> From <b>₹51,000*</b> *The only one-stop destination from India to Australia www.indigo.in	<b>BOOK NOW</b>

Attractive cashback offers available on Cleartrip, Goibibo, MakeMyTrip and Yatra  
\*OFFERS END ON: DECEMBER 9<sup>th</sup> 2018 | TRAVEL VALIDITY: UP TO DECEMBER 7<sup>th</sup> 2019

FOR MORE INFORMATION VISIT: [WWW.AUSTRALIA.COM/AIRDEALS](http://WWW.AUSTRALIA.COM/AIRDEALS) OR YOUR NEAREST AUSSIE SPECIALIST TRAVEL AGENT.

\*There is a condition apply. Tourism Australia is not a travel agent. 2018 is not responsible for providing, collecting or facilitating bookings or the other cost of the travel arrangements. Conditions of the sale are provided by individual airlines operators and are subject to the terms and conditions provided by those parties. The above fares are quoted by the airline operator and subject to change without notice. Offer valid from 18 December 2018 until 09 December 2019 and must be used by 07 December 2019. Please refer to the website for more details. \*Excludes of Insurance, Taxes and Fees. \*The only one-stop destination from India to Australia. \*The above fares will not be valid during peak periods or during peak holiday times. \*Check with the airline operator to verify the full terms and conditions and to book this offer. The above fares will not be valid during peak periods or during peak holiday times. \*Check with the airline operator to verify the full terms and conditions and to book this offer. The above fares will not be valid during peak periods or during peak holiday times. \*Check with the airline operator to verify the full terms and conditions and to book this offer.

To the 78% of Indians who say  
**Australia is their dream destination**  
Live the dream with our unbeatable airfare deals

From **₹ 25,000/-**  
Book Now

AUSTRALIA

**Australia.com** Sponsored

Rubik's cube shaped wineries, islands that disappear at low tide, pink lakes, underground towns & selfie-loving animals, have an insta-worthy holiday in Australia!

AUSTRALIA.COM  
Return airfares start @ **₹25,000\*** [LEARN MORE](#)

232 3 comments 8 shares

Like Comment Share

To the 78% of Indians who say  
**Australia is their dream destination**  
Live the dream with our unbeatable airfare deals

From **₹25,000\***  
Book Now

AUSTRALIA

# Distribution initiatives

- Australia Marketplace: Now the largest offshore TA event
- ASP team delivered over 2,400 trainings
- Interactive webinars
- Trade Events: Corroboree Asia and ATE
- Launch of Premier Aussie Specialist program
- ASP Ambassador Program
- Aim to deliver 'India Ready' webinar for the Australian industry in partnership with ATEC



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# KDP Partnerships

There's Nothing Like Australia  
AUSTRALIA.COM

To the 79% of Indians who think  
**Australia is a daytime destination**  
Think again

Field of Light, Northern Territory

UnDiscover Australia with these unbeatable packages

Customised Holidays

- 10-day Australia & The Ghan  
Visit Cairns, Uluru, Ayers Rock, Adelaide, Melbourne, Sydney & The Ghan
- 11-day Ultimate Australia  
Visit Melbourne, Ayers Rock, Sydney, Cairns & Gold Coast

Enjoy Special Discount of 5% & Choose from a Range of Unique Experiences

Take an Unforgettable Expedition on The Ghan • The Great Southern Rail • Dive into the Vibrant Cairns of the Great Barrier Reef • Witness the Field of Lights • Visit MOG - As I was Crick Stadium • Experience the Penguin Parade at Phillip Island • Enjoy on the Big Old Gwini Island Cruise with EGO

Call: 902 903 4444  
www.sotc.in  
SMS HOLIDAYS to 5667743

**SOTC**  
For Holidays

DELICIOUS DISCOVER THE TRAILS • GORRUPH • GRAND • GRAND • TRAVEL • HOLIDAY SERVICES

Package 23: Accommodation, car hire, standard travel insurance upto 50 years of age, travel, engineering, meals & drinks as per itinerary. Included flights are subject to availability. Travel cost is 2700 USD. Prices are for Mumbai per adult on half board basis. 1 child up to 100 kg will be charged at the rate prevailing on the date of payment. Please refer to our full terms and conditions. Special offer: GST is applicable to all rates. SOTC is a business of SOTC Travel Ltd. (Formerly SOTC Travel Ltd.)

To the 81% of Indians who think  
**Australia is all about the cities...**  
Think again

THOMAS COOK PRESENTS  
**GRAND INDIAN HOLIDAY SALE**  
8th - 17th MARCH

5% cashback on yoco

For more details log on to www.diyotc.com

GREAT BARRIER REEF QUEENSLAND

UnDiscover Australia with these unbeatable packages

**BEST PRICE CHALLENGE**

If you find a lower price, we'll match it and pay double the difference.

AUSTRALIAN EXTRAVAGANZA (10N/11D) | Best Price: ₹2,55,000\* | Flight includes group holiday

**ALSO AVAILABLE**

- #LIVEITUP AUSTRALIA (8N/9D)  
Starting @ ₹2,40,500\*  
Visit: Darwin, Cairns & Sydney  
(Flight includes group holiday)
- AUSTRALIAN DREAMS (11N/12D)  
Starting @ ₹1,45,000\*  
Visit: Adelaide, Kangaroo Island, Melbourne, Cairns & Sydney  
(Customised holiday without flight)

\*Common Inclusions: Accommodation, meals and sightseeing as per itinerary.

For nearest branch, call **1800-2661-500** For online booking **8828840195 thomascook.in**

Terms & conditions apply. Flight inclusive prices mentioned are Ex-Mumbai, on per person & non-sharing basis. ICC calculated as 1 AUL + 10% of the rate of exchange is subject to change and will be charged as per the rate prevailing on the date of payment. GST as applicable. Visa fees not included in Customised holidays. Customised are applicable on certain itineraries. GST 10%000 contribution of upto ₹10,000 to valid on minimum non-refundable value of ₹10,000 on total amount paid through YOCO app. Validity during the period: 100% Cashback is valid for non-refundable items only during the offer period. Flight inclusive group holiday packages are valid from April 2019 till 31st Dec 2019 and flight not included customised holiday packages are valid till 31st Dec 2019. For detailed terms and conditions visit thomascook.in.

Job ID: 140319, Job No.: 2166, Client: Thomas Cook\_Australia GPS\_BA Campaign\_Mumbai\_TOL Size: 16cm x 25cm, New Size, Job Completed: 14/03/19  
ValueNetwork 2019/March/Thomas Cook\_2166\_GPS\_BA\_Campaign

Presenting MAKEMYTRIP HDIC BANK FOREXPLUS CARD!

To the 79% of Indians who think Australia is a daytime destination

10% to 27% Instant Discount on 4 & 5 Star Hotel stays in India

Get FLAT 4% OFF on your bookings

Unlimited Travel Miles

Choose IMPERIAL

make my trip

10 Things To Do In Kangaroo Island, Australia

BEACH

make my trip

LUXURY GETAWAYS

Discover The Land Down Under Differently: Explore The Great Walks of Australia

MakeMyTrip-Flight Hotel Bus Cab IRCTC Rail Booking

Sponsored by

Get gear up for an exciting holiday in Australia next holiday!

Holiday in Australia

BOOK NOW

KDP Partnerships: Bookings: 62,600 (+21%)



## Stars aligned in Australia's favour

---

- Strong foundation set since the launch of the India 2020 Plan
- Consistent increase in Out of Region (OOR) market share
- Relative stability of the Aussie Dollar
- Over 90,000 Indian students currently in Oz
- Doubling of Indian-born Australian population over the past 5 years
- Improved political and trade relations





**Scott Morrison** @ScottMorrisonMP · Jun 29  
Kithana acha he Modi! #G20OsakaSummit



Narendra Modi

5.3K 21K 114K



TOURISM AUSTRALIA



# THE INDIA OPPORTUNITY



# INDIA

TOURISM AUSTRALIA



**“Anything you say about India is true. But so is the opposite.”**

*- Shashi Tharoor*

*Co-existence of the rich & the poor, urban and the rural, literate and the not so educated, modern versus cultural, makes this market truly diverse, extremely fragmented, unique and exciting!*



# Fragmented media environment

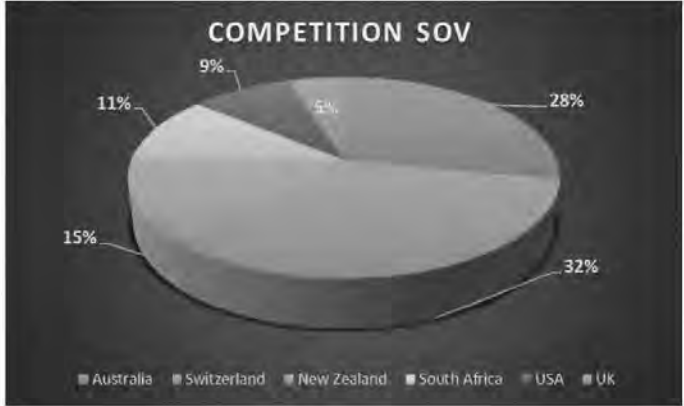
TELEVISION
From Terrestrial to DTH/ Digital TV <b>550+ Channels</b>
ONLINE
Over <b>1.1 bn</b> mobile phone subscribers <b>500 Mn+</b> internet users <b>142 Mn</b> on Social Media

PRINT
From Black&White to daily colour <b>70,000+</b> publications
RADIO
<b>340+ Stations</b>

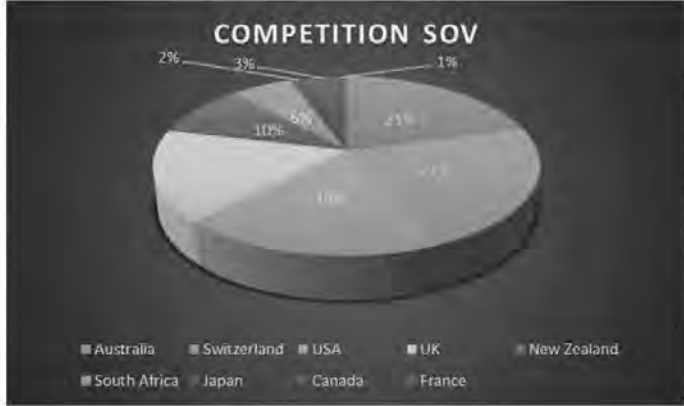
OUTDOOR
From hand painted to 3D Vinyl, Digital <b>Over 1 million sites</b>
CINEMA
From Theatres to Multiplexes Over <b>4,000</b> single screens and <b>1,000</b> Multiplexes

# PR - Share of Voice (SOV)

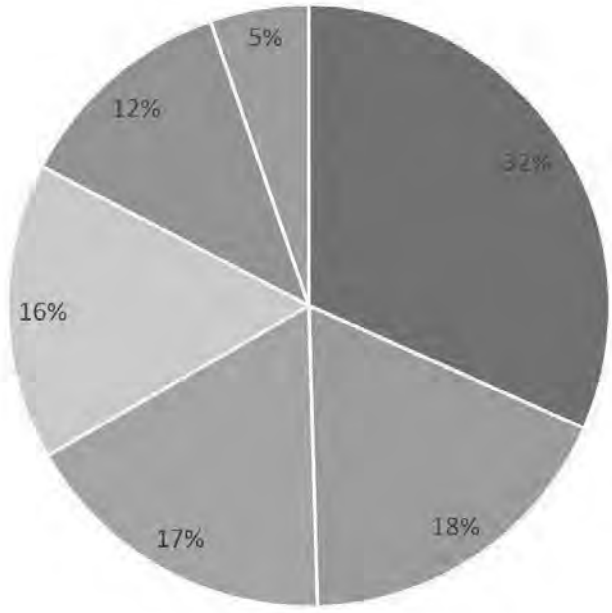
# Media SOV



PR - Print

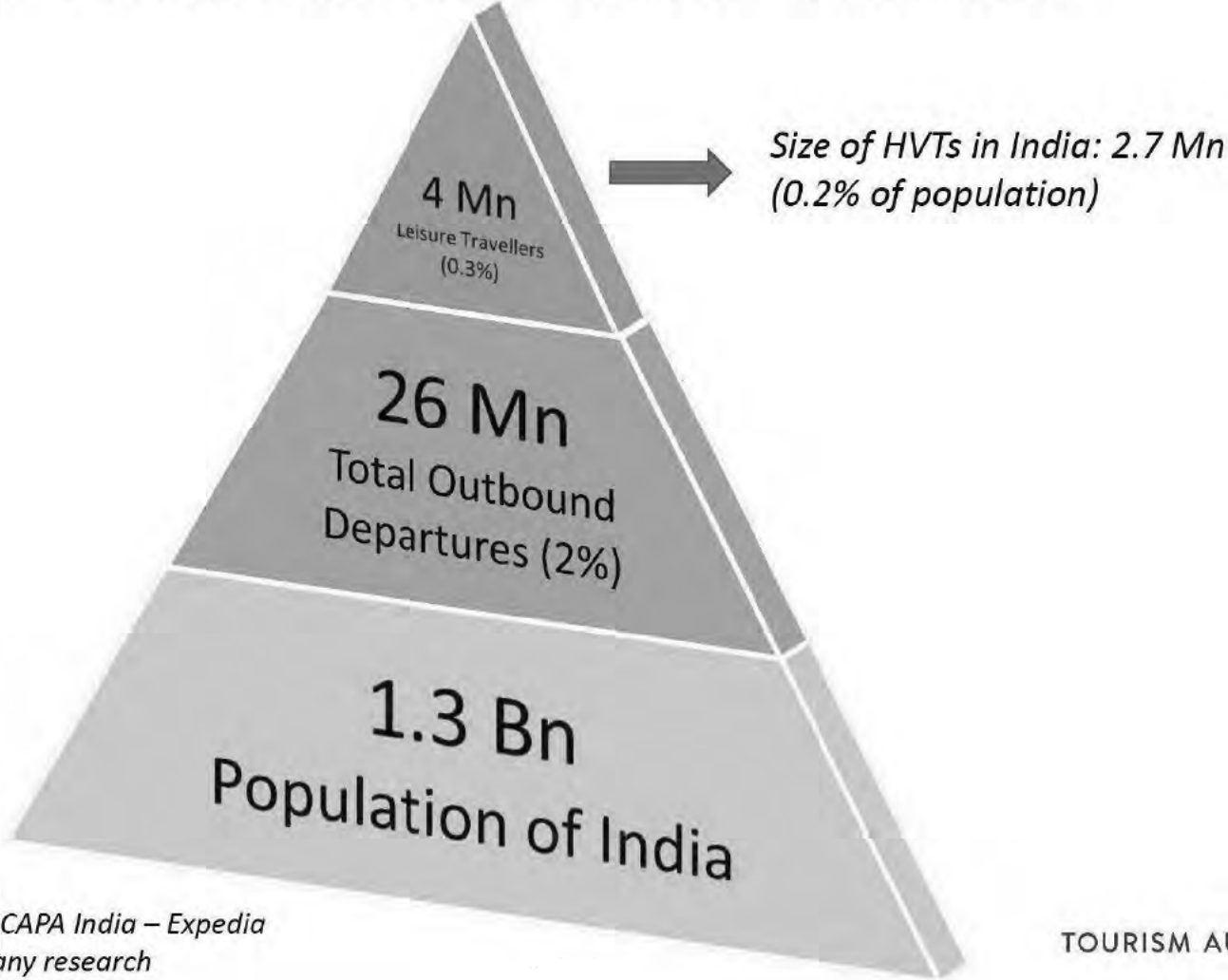


PR - Online



- USA Tourism
- New Zealand Tourism
- South African Tourism
- Tourism Australia
- Switzerland Tourism
- Britain Tourism

# Size of India's Outbound Travel Market



# Incredible India & Indian consumer

1. INDIA - Many countries in One country
2. Media fragmentation & high cost of media
3. Brutal negotiators/ deal seekers
4. High spenders, but value-conscious
5. High service delivery expectations (Average household will have min 4 to 5 assistants)
6. Frugal (smaller SKUs, selling newspapers/ empty bottles)
7. Cash is still the king. Cash to co-exist with digital wallets
8. Low credit card penetration (3% of population - 36 Mn)
9. Less than 2% of population pay income tax
10. MNCs localising campaigns to woo & connect with the Indian consumer (e.g. McDonalds, KFC, Ikea, Google, Samsung, Apple, etc.)
11. Fragmented travel distribution – 80:20 rule does not apply
12. Click & Mortar: Co-existence of traditional & modern, with over 10,000+ agents

# The India Opportunity

- India is the fastest growing economy in the world
  - Strong fundamentals will deliver growth
  - GDP growth estimated to be 7 to 8% over the next few years
- Rising, aspirational middle class: 300 Mn (500 Mn by 2025)
- Fastest growing outbound travel market
  - 26 Mn outbound visits during 2018 (10-year CAGR: 8%)
  - Estimated to grow to 35 Mn by 2020, and 70 Mn by 2035
  - 1.8 bn domestic visits, indicating a strong penchant for travel



# ***TOURISM 2025***

## ***Realising India's potential***

**FROM:**  
**358,000 visitors**

**A\$ 1.7 Bn**  
**in total spend as at Dec 2018**

**UP TO:**  
**1,000,000 visitors (CAGR: 15.8%)**

**A\$ 5 BN (CAGR: 16.7%)**  
**in total spend by Dec 2025**

# The future:

500k visits & A\$ 2.3 bn spend by 2020

1 Mn visits & A\$ 5 Bn spend by 2025

Arrivals – 2025 CAGR: 15.8%

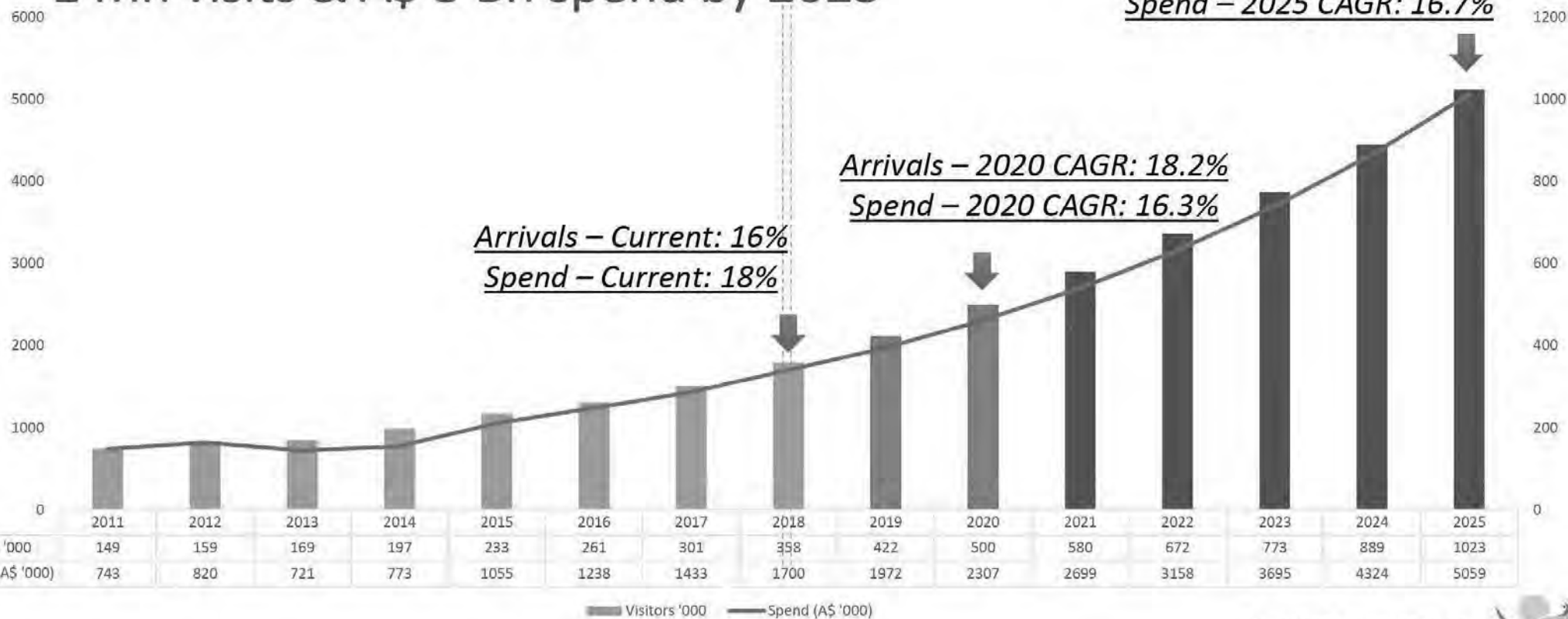
Spend – 2025 CAGR: 16.7%

Arrivals – 2020 CAGR: 18.2%

Spend – 2020 CAGR: 16.3%

Arrivals – Current: 16%

Spend – Current: 18%



# Tourism 2025: 1 Mn Visitors & A\$ 5 bn Spend

## Know the customer

- Capitalise on the ICC T20 CWC 2020 opportunity & launch a bespoke campaign – next phase of TNLA, with an emotional route
- Increased digital thrust, through content and advocacy
- Targeting the high value travellers (HVT)
- Leveraging Friends of Australia (FoA) and influencer network
- Few, Bigger, Better (High Impact)

## Quality Experiences

- All 8 STOs: New products, experiences and destinations to drive dispersal & yield
- Culture training to be India ready
- New segments: BE, Special Occasions, Students/ Education tours, Sport tours
- Trade events, ASP and Premier ASP

## Geographic Strategy

- Focus on top 10 Indian cities, that contribute to 80% of affluent households & visitor arrivals into Australia
- Leverage KDP and OTA distribution network to increase reach

## Aviation and Access

- Visas:
  - Reduce processing timeline to a week
  - New products: 10-year, multiple entry at the same cost, Family Visa, Documentation waiver for BE.
  - Re-introduce Preferred Agency Scheme or a similar scheme
- Work with Indian/ Australian carriers, Australian airports and STOs to facilitate direct access
- Continue 'One-Voice' partnerships with AI, SQ, MH (primary), QF & TG/ CX (secondary), and the STOs



# Key issues & challenges for India

- Supply-side constraints: Aviation & Visas
  - Drop in holiday purpose of visitation
  - Working closely with immigration (enhanced comms, media interactions, webinar, industry updates)
- Competition – Increased spend and localisation with Bollywood celebs
- Fragmented distribution
- Measuring spend of the Visiting Friends & Relatives (VFR) segment
- Conversion research findings:
  - Australian icons less iconic & hence sharable
  - Time, price & distance the major barriers
  - Lingering perception of 2009/ 10 incidents involving Indian students & on-field rivalry between the cricket teams make Australia less inviting & welcoming



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The road ahead...

# Key Objectives FY 19/20

Maintain  
double-digit  
growth in  
arrivals & spend

Achieve  
A\$ 2.1 bn  
Spend

Maintain out of  
region market  
share



# The next big thing...

- Dual objectives:
  - Leverage the contextual media opportunity to create aspiration and raise Australia's appeal
  - Driving visitation to the tournaments
- Bespoke campaign to be launched in October 2019



# ICC T20 CRICKET WORLD CUP 2020

Television and Digital Live Stream

ESPNCricinfo

Cricketer & PR Engagements

FOA Engagement

Content Partnerships

KDP/ OTA Partnerships





# Driving aspiration and demand

- Targeting the High Value Travelers (HVTs), through online initiatives
- Focus on top 8 cities of India
- Promote Signature Experiences of Australia
- Collaborate with key distribution partners (KDPs)
- Partner with DFAT for 'Australia India Business Xchange (AIBX)' – Feb 2020'

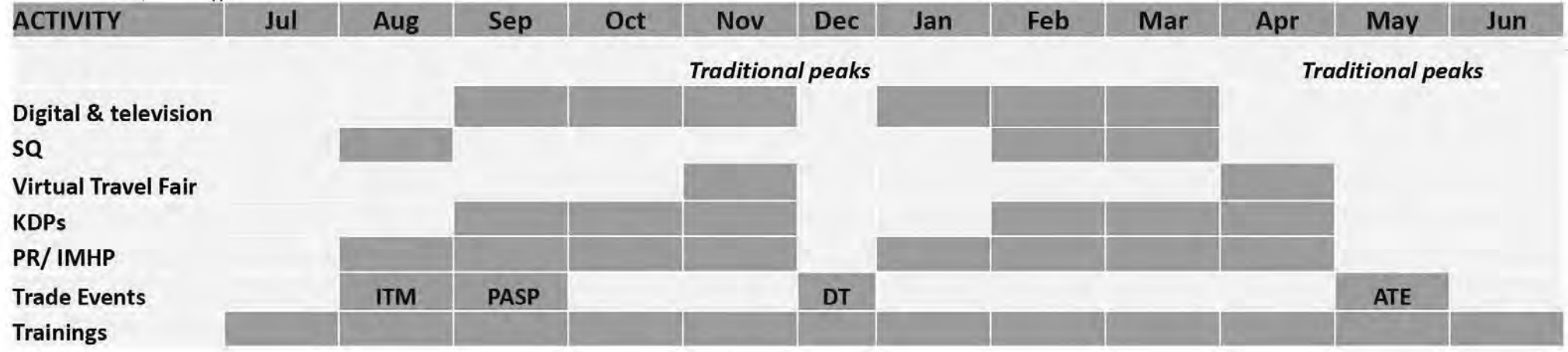
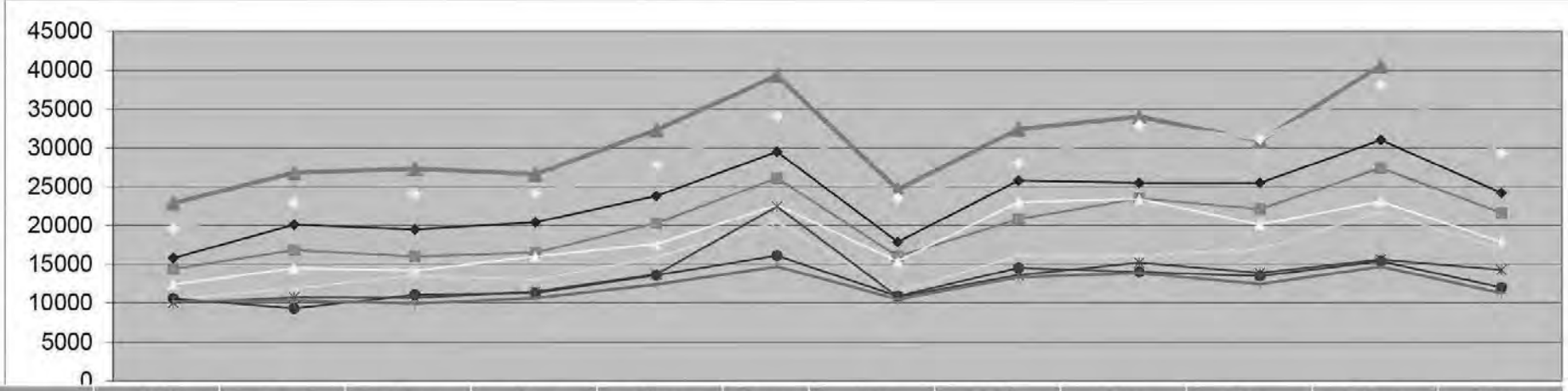
# Aviation & Access

- Cooperative partnerships with Singapore Airlines
- Airline Marketplace in Nov'19 and Apr'20
- Working with STOs and State Governments to encourage Indian carriers to fly to Australia
- Work closely with Department of Home Affairs and government relations team to facilitate access and reduce processing timelines

# Distribution initiatives

- Trade events – AMI'19, Premier ASP famil, Dreamtime (Perth, Dec 2019), and ATE 2020, Melbourne
- Launch of new products, experiences and destinations, leveraging on the Aussie Specialist Program
  - Face to face trainings and webinars
- Explore new segments:
  - Celebrating special occasions in Oz (Milestones, anniversaries, birthdays, pre-wedding shoots)
  - Education tours for students. Support Austrade to promote Education in Oz
  - Club exchange programs for sports (Cricket, Hockey & other sports)
- Business Events
- Getting India ready

# Activity calendar - 19/20



## In summary:

- India's rise is inevitable. Capitalise on the India opportunity
- India can exceed expectations and achieve 500k and 1 Mn visitation by 2020 and 2025 respectively
- Work on fewer, better, bigger ideas, increase Investment, and leverage the ICC T20 CWC, to translate this dream into reality

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THANK YOU

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# DISCOVER CANBERRA



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# Australia's national capital city



Sydney

Melbourne

Canberra



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One of the most beautiful, clean, secure and hospitable capital cities in the world



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Canberra is a rare treat among Australian cities, providing a kaleidoscope of colour, activity and experiences based around four distinct seasons



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# **Singapore Airlines operates daily flights from Singapore to Canberra (SQ288), connecting to all major ports across India**

