

- three-fourths of the ACT's electricity comes from large scale renewable power projects;
 - a little more than one-fifth comes from capacity within the ACT; and;
 - the remainder comes from solar power generated from ACT homes.
- The ACT Government's commitment has helped draw in over \$500 million investment in large-scale wind and solar renewable infrastructure for the next 20 years.
- Canberra has the first Australian facility to test 100 per cent hydrogen on existing materials, equipment and work practises to prepare for potential application to the existing gas network. The facility is housed at the Canberra Institute of Technology.
- The ACT Government is heavily invested in medical research and allied health training.
 - The education and health sectors in the ACT together make up approximately one-fifth of the Territory's economy and are Canberra's largest economic sectors after public administration.
 - The ACT Government invests significant funding into health research and health education and training each year.
 - The ACT Government's commitment to supporting health training and research was reinforced by its investment in the University of Canberra Public Hospital (UCPH), a research and training facility located at one of Canberra's flagship universities.
 - The UCPH falls under the auspices of the ACT Government's Health Directorate, which also has responsibility for working with institutions to provide placements for allied health students.
 - The ACT Government has prioritised healthy and active living as a key area for future economic growth and community benefit.
 - There are approximately 2,000 students in the ACT studying health at the postgraduate level.
 - Based on the most recent data, the number of overseas students studying health in the ACT has almost tripled over the last four years (from 160 to 426).

Key questions (General)

- What have been the primary benefits of partnering with UNSW?
- Have any of your partnership activities extended to UNSW Canberra?

Key questions (TERI)

- Are you aware of Canberra's commitment to being 100% reliant on renewable energy?
- Have you heard of the CEAT agri-tech hub in Canberra?
- Have you considered partnerships with the ANU or Commonwealth Scientific and Industrial Research Organisation (CSIRO)?
- What are your criteria for establishing partnerships with universities?

Key questions (George Institute)

- What other university partnerships does TGI have?
- What are your criteria for establishing partnerships with universities?

ADDITIONAL INFORMATION

Under the University's India Growth Strategy, UNSW has made series of targeted and strategic investments in developing transformative partnerships in India.

UNSW + The George Institute

The George Institute for Global Health (TGI) is headquartered in Sydney, with major centres in China, India and the UK, and projects in approximately 50 countries worldwide. In 2018 TGI was ranked the top independent research organisation in Australia, and 33rd overall in the world. The George Institute is focused on improving global health, especially for those at socio-economic disadvantage or living in resource-poor settings.

The UNSW Faculty of Medicine ranks among the world's top 50 medical faculties and among Australia's leaders in medical education and research, addressing some of the most significant health issues facing society. UNSW Medicine's theme-based research strategy focuses resources on identified areas of excellence including cancer; neuroscience, mental health and addiction; infectious diseases, immunity and inflammation; and non-communicable diseases such as cardiovascular disease.

In May 2017, UNSW and TGI entered a new strategic partnership to dramatically boost medical research, both in Australia and overseas. Initial areas of focus included non-communicable diseases and injuries, clinical trials, epidemiology and biostatistics, with plans to collaborate in the emerging field of healthcare 'big data'.

In August 2019, UNSW and TGI launched a program designed to accelerate and scale up health focused start-ups, called Health 10X.

UNSW + TERI

The GRIHA Council is an independent, not-for-profit society jointly set up by The Energy and Resources Institute (TERI), the Ministry of New and Renewable Energy (MNRE) and the Government of India. GRIHA has been acknowledged as a tool to evaluate the reduction in emission intensity through habitats. It forms part of the mitigation strategy for combating climate change in India's Nationally Determined Contributions (NDCs) submitted to the United Nations Framework Convention on Climate Change (UNFCCC).

UNSW was the co-designer, co-creator and co-host of the flagship Green Rating for Integrated Habitat Assessment (GRIHA) Summit in New Delhi with TERI in December 2018. UNSW's partnership with TERI in the Summit complements India's plan of ensuring access to adequate, safe, affordable housing and basic services for all citizens by 2030. It also demonstrates how UNSW's investment in India's education, knowledge exchange and research agenda are contributing to the Australian government's new India Economic Strategy to 2035.

UNSW has been invited by TERI to co-create the 11th GRIHA Summit in December 2019 along with setting up a joint 'Living Lab' in India to showcase world-leading, multi-disciplinary research solutions for transforming India's sustainable development agenda.

INDIA MISSION – SEPTEMBER 2019

BRIEFING NOTE

MEETING:	MEETING WITH TOURISM INFRASTRUCTURE INVESTORS
DATE:	Tuesday, 3 September 2019
MEETING TIME:	8:45am-9:45am
TRAVEL TIME:	Nil
VENUE:	The Imperial Hotel
TO BE MET BY:	TBC
ROLE:	Participant
MEETING PROTOCOL:	Nil
PARTICIPANTS/ATTENDEES:	<p><u>Investors</u></p> <ul style="list-style-type: none"> • 2.2(a)(ii) Mapple Hotels • Mapple Hotels • 2.2(a)(ii) Director of Radisson Chandigarh • Director of Radisson Chandigarh • Director of Radisson Chandigarh • 2.2(a)(ii) Director Clarion Inn Sevilla, Chandigarh/Zirakpur • 2.2(a)(ii) Director Clarion Inn Sevilla, Chandigarh/Zirakpur • 2.2(a)(ii) Managing Director of Surya Funcity Limited and Bonzo Resorts Limited <p><u>ACT Government</u></p> <ul style="list-style-type: none"> • Chief Minister • Mr Deepak-Raj Gupta MLA • Ms Kaarin Dynon • Mr Brendan Smyth • Mr Ash Balaretnaraja
ORDER OF PROCEEDINGS:	TBC
MEDIA OPPORTUNITY	Nil

Overview

The purpose of the meeting is to discuss with potential investors the tourism infrastructure opportunities that are available in Canberra.

Meeting objectives

To brief potential investors on the opportunities that are available in Canberra.

Key messages

- Canberra's potential as a global aviation hub is growing. 14 international air services land in Canberra each week via Singapore Airlines and Qatar Airways.

- As a result, Canberra is currently seeing record international visitation and spend. Visitation is being driven by people coming to the capital to holiday, visit their friends and relatives, and for education purposes.
- With significant growth in international visitation and ongoing investment in new tourism infrastructure, the ACT Government is looking for continued growth from the international airlines that connect with Canberra.
- Aviation partnerships are key to reaching identified international markets.
- International co-operative marketing campaigns have been delivered in partnership with Singapore Airlines in Singapore, Malaysia, India, Hong Kong, China and UK.
- Partnership with Tourism Australia allows VisitCanberra to amplify key messages through their programs and in-market teams.
- Spend by international visitors in Canberra increased to \$603 million for year ending March 2019.
- India is developing into one of the most important international markets for Canberra.
- It is now the fourth largest market by volume behind China, UK and USA. The Indian market provides 6.5 per cent of total international visitors to Canberra.
- Visitation from India grew by 41 percent for the year ending March 2019. The market is performing strongly across leisure, visiting friends and relatives and education.
- VisitCanberra has appointed a full time staff member that is based in Tourism Australia's Singapore office. The resource is dedicated to building and managing key relationships and promoting Canberra to Singapore, Malaysia and India

ADDITIONAL INFORMATION

- Nil

Attachments

- Nil

INDIA MISSION – SEPTEMBER 2019

BRIEFING NOTE

MEETING:	Meeting with Australian Consul-General to Mumbai
DATE:	Wednesday, 4 September 2019
MEETING TIME:	8.00am-9.00am
TRAVEL TIME:	Nil
VENUE:	Vetiver Room, Taj Mahal Hotel
TO BE MET BY:	Mr Brendan Smyth
ROLE:	Participant
MEETING PROTOCOL:	N/a
PARTICIPANTS/ATTENDEES:	<u>Australian Consul-General</u> <ul style="list-style-type: none"> • Mr Tony Huber, Australian Consul-General • Mr Peter Coleman, Trade Commission, Austrade • Mr Matthew Durban, Senior Trade & Investment Commissioner, Austrade <u>ACT Government</u> <ul style="list-style-type: none"> • Chief Minister • Mr Deepak-Raj Gupta MLA • Ms Kaarin Dyonon • Mr Brendan Smyth • Mr Ash Balaretnaraja
ORDER OF PROCEEDINGS:	N/a
MEDIA OPPORTUNITY	N/a

Overview

A meeting with the Australian Consul-General to gain a better understanding of how the current state of Australian-Indian relations impacts the tourism and tertiary education markets.

Meeting objectives.

- To gain a better understanding of the state of Australian-Indian relations;
- To learn whether the Australian government has a view on the Indian government's education reforms, or how it might position Canberra to benefit from India's desire to build international links for education; and,
- To better understand the role played by the Australia India Education Council (AIEC) in setting the policy environment for tertiary education.

Key messagesTourism

- Canberra's potential as a global aviation hub is growing. 14 international air services land in Canberra each week via Singapore Airlines and Qatar Airways.

- As a result, Canberra is currently seeing record international visitation and spend. Visitation is being driven by people coming to the capital to holiday, visit their friends and relatives, and for education purposes.
- With significant growth in international visitation and ongoing investment in new tourism infrastructure, the ACT Government is looking for continued growth from the international airlines that connect with Canberra.
- Aviation partnerships are key to reaching identified international markets.
- International co-operative marketing campaigns have been delivered in partnership with Singapore Airlines in Singapore, Malaysia, India, Hong Kong, China and UK.
- Partnership with Tourism Australia allows VisitCanberra to amplify key messages through their programs and in-market teams.
- Spend by international visitors in Canberra increased to \$603 million for year ending March 2019.
- India is developing into one of the most important international markets for Canberra.
- It is now the fourth largest market by volume behind China, UK and USA. The Indian market provides 6.5 per cent of total international visitors to Canberra.
- Visitation from India grew by 41 percent for the year ending March 2019. The market is performing strongly across leisure, visiting friends and relatives and education.
- VisitCanberra has appointed a full time staff member that is based in Tourism Australia's Singapore office. The resource is dedicated to building and managing key relationships and promoting Canberra to Singapore, Malaysia and India

Tertiary Education

- The last two meetings of the AIEC resulted in affirming the need for institutional partnerships to strengthen collaboration between students, academics and universities.
- The Memorandum of Understanding currently in force between the Australian and Indian governments commits to encouraging the development of such cooperation, to include twinning arrangements between institutions of higher learning and research organisations.
- The MoU currently in force also commits to sharing of information on best practices for education, skills development, and standards development.
- The above goals appear consistent with leveraging Australia-based institutions to support the Indian government as it embarks on the New Education Policy and EQUIP reforms.
 - The EQUIP reforms in particular emphasize the need to improve Indian universities' curricula up to international standards of learning and quality assurance.

Key questions

- How has the Australian government progressed in meeting the initial recommendations of "An India Economic Strategy to 2035"?
- Did the Indian government have any response to "An India Economic Strategy to 2035"?
- How strongly does the Australian government view growing links between the Australian and Indian tertiary education systems as a priority? What are its main priorities for leveraging India's modernisation?
- What are the primary channels the Australian and Indian governments use to coordinate AIEC activities? Who currently sits on the AIEC?
- How much involvement does the Australian High Commission have with the AIEC?
- What barriers exist, or previously existed, in establishing partnerships between Australian and Indian tertiary education institutions that are addressed by the MoU between the two governments?

- Have other Australian States and Territories been successful in using the MoU to deepen ties to the Indian tertiary education sector?
- Has the Australian government offered any kind of assistance to the Indian government in its pursuit of tertiary education reforms? Is there even a mechanism for providing such assistance, if the Indian government so requested?

ADDITIONAL INFORMATION

- The AIEC has almost no appreciable engagement with Australian State and Territory governments. While its website indicates some limited promotion of particular Australian-Indian study programs at the State and Territory level, there has been effectively no new information posted since 2017.

Attachments

- Memorandum of Understanding between the Government of Australia and the Government of the Republic of India on Cooperation in the fields of Education, Training and Research (August 2015)
- Australia-India Ministerial Dialogue on Education Cooperation Joint Communique (June 2018)

INDIA MISSION – SEPTEMBER 2019

BRIEFING NOTE

MEETING:	MEETING WITH THE CHIEF MINISTER OF MAHARASHTRA, MR DEVENDRA GANGADHARRAO FADNAVIS
DATE:	Thursday 5, September 2019 (TBC)
MEETING TIME:	TBC
TRAVEL TIME:	
VENUE:	TBC
TO BE MET BY:	
ROLE:	Participant
MEETING PROTOCOL:	N/a
PARTICIPANTS/ATTENDEES:	<u>Maharashtra Government</u> <ul style="list-style-type: none"> • Mr Devendra Gangadharrao Fadnavis, Chief Minister <u>Australian Consul-General</u> <ul style="list-style-type: none"> • Mr Tony Huber, Australian Consul-General <u>ACT Government</u> <ul style="list-style-type: none"> • Chief Minister • Mr Deepak-Raj Gupta MLA • Ms Kaarin Dynon • Mr Brendan Smyth • Mr Ash Balaretnaraja
ORDER OF PROCEEDINGS:	N/a
MEDIA OPPORTUNITY	N/a

Overview

The *International Engagement Strategy* details India as one of our ten priority countries. Mumbai, the financial centre of India, is the capital of the State of Maharashtra.

Your meeting with the Chief Minister of Maharashtra, Mr Devendra Fadnavis (biography at [Attachment A](#)) is to discuss opportunities of mutual interest and benefit for both cities.

Meeting objectives.

- A courtesy call on the Chief Minister of Maharashtra to discuss opportunities of mutual interest and benefit for both cities.
- To acquaint the Chief Minister of Maharashtra with the attributes of Canberra
- Areas of interest and opportunity may include
 - Education, training and skills development
 - Water and waste management
 - Research opportunities
 - Agribusiness

- To establish a relationship between the two cities

Key messages

- Canberra is ideally placed to work with Maharashtra Government, businesses and service providers to address the growing needs of Maharashtra's population.
- Canberra is the education and research capital of Australia
- Canberra leads Australia in the use of renewable energy
- Canberra has extensive experience in the management of water resources
- Canberra has innovative approaches to waste management

Key questions

- Does the Maharashtra government have any response to "An India Economic Strategy to 2035"?
- What is the Maharashtra Government's approach to water management?
- Does the Chief Minister have any areas of research on which he would like to cooperate with the ACT on?
- Canberra has a growing agri-business sector. What areas of agriculture research can the ACT assist Maharashtra with?

ADDITIONAL INFORMATION

- Maharashtra is the wealthiest of all the Indian states.
- Maharashtra's per capita income is 50% above the Indian average
- The population of Maharashtra is 112,000,000 people.
- The State Snapshot on Maharashtra from *India Economic Strategy to 2035* is at [Attachment B](#).

Attachments

- [Attachment A](#) – Biography of the Chief Minister of Maharashtra, the Hon.
- [Attachment B](#) – State Snapshot of Maharashtra

Biography of Chief Minister of Maharashtra



Devendra Gangadharrao Fadnavis is the 18th Chief Minister of Maharashtra. His political career began in the mid-nineties and in a short span of time, he has become a respected political leader of the masses. His diverse educational background includes a Graduate Degree in Law, a Post Graduate Degree in Business Management and a Diploma in Project Management from D.S.E. Berlin. His personal ideology is that 'Politics is an instrument for socio economic change' and his political career of 25 years so far reflects the same.

Shri Fadnavis' years of public service are based on his core belief of 'People First' and his drive to serve, stems from his desire to see equitable progress for all in the state. He has essayed multiple leadership roles for both his political party as well as an elected representative of the people of Nagpur, Maharashtra. He has served as an elected member in the Municipal Corporation of Nagpur for two consecutive terms, in 1992 and 1997. He has been elected Member of the Legislative Assembly of Maharashtra State, representing Nagpur, since 1999 and is serving his 4th Term. In his many years as a representative of the people in the Maharashtra State Assembly, he has been a part of several committees.

Knowledge driven policy making, solving root cause of problems, and using technology as key enabler – these are the three pillars of his result driven vision to transform Maharashtra with a 360 degree approach. Ambitious initiatives like JalYukta Shivar, which aims at a Drought Free Maharashtra by 2019, in a state that has been plagued by drought and hardship for decades is an example of how his mission as a leader is to serve and empower the people through sustainable solutions. Under his stewardship and efforts to boost investment and industrialisation, Maharashtra has achieved the feat of attracting 50% of the total FDI inflow into the country in 2016. He has successfully launched the Right to Service Act, a first of its' kind in the country to ensure efficient delivery of Public Services among other initiatives that are aimed at ensuring good governance in the State. 393 services have been brought online and over 2 crore people have benefitted within just a few months of the launch. Shri. Fadnavis' inclusive leadership involves fresh perspective and energy through Youth Participation towards governance and policy making.

As a seasoned public representative, CM Devendra Fadnavis' political acumen and skill has been recognised in several forums, both nationally and internationally. He has been the recipient of many awards, including one from the Commonwealth Parliamentary Association for the 'Best Parliamentarian'. He was awarded the prestigious Nag Bhushan award for the year 2016 for his outstanding work for Vidarbha's cause as well as his contribution in social and political fields.

He is known for his intellectual analysis and thought leadership on several subjects including fiscal issues. Given his keen interest in sustainable growth, he has received invitations to several international conferences to share his views on topics like climate change and energy security. He has also been elected as a secretary of the Global Parliamentarians Forum on Habitat for Asia region.

He is also the first Indian to be selected for an Honorary Doctorate by Osaka City University, Japan for his initiative taken through major reforms for socio-economic development in Maharashtra.

Shri Devendra Fadnavis was sworn in as the 18th Chief Minister of Maharashtra on 31st October 2014 and currently holds the Home, General Administration, Urban Development, Home, Law and Judiciary, Ports, Information and Public Relations portfolios.

INDIA MISSION – SEPTEMBER 2019

MEETING:	University of Canberra Partners' Reception
DATE:	Wednesday, 4 September 2019
MEETING TIME:	12:00pm – 2:00pm
TRAVEL TIME:	Nil
VENUE:	Princes Room, Taj Mahal Palace, Mumbai
TO BE MET BY:	<ul style="list-style-type: none"> - Prof Lawrence Pratchett, Pro Vice Chancellor (Students, Partnerships & International), University of Canberra - Aditya Vaddiparthi, Business Development Manager – South Asia & MENA, University of Canberra
ROLE:	Witness the signing of MoUs and support expansion of University of Canberra's activities in the region
MEETING PROTOCOL:	Nil
PARTICIPANTS/ATTENDEES:	See Attachment A
ORDER OF PROCEEDINGS:	12:00pm: Guests arrive at venue 12:15pm: The Chief Minister arrives at venue 12:20pm: MoU signing ceremony begins with a welcome note by Prof Pratchett 12:25pm: Brief note by the Chief Minister 12:35pm: MoU Signing – Thakur College of Science and Commerce 12:45pm: MoU Signing – KPB Hinduja College of Commerce 12:55pm: MoU Signing – KES Shroff College of Arts and Commerce 1:05pm: Lunch 2:15pm: Event concludes
MEDIA OPPORTUNITY	Nil

Overview

The lunch is hosted by the University of Canberra to sign a Memoranda of Understanding with colleges affiliated with the University of Mumbai.

Meeting objectives.

- to support the partnerships developed by University of Canberra in the region;
- to build relationships with the University of Mumbai; and
- promote Canberra as Australia's location of choice for tertiary education twinning.

Key messages

- University of Canberra's commitment to building partnerships in India is fundamental to the broader strategy that Canberra has for international engagement and for tertiary education.

- Promoting value of Canberra as not only the nation's capital but also the leading knowledge economy in Australia.
- Canberra as the most socially and economically progressive city in Australia.
- A multicultural city that successfully integrates people from different backgrounds, including major social events such as Canberra's annual multi-cultural festival and the annual curry festival.
- Canberra as a growing destination for international students and one of the world's most liveable and student friendly cities – largest proportion of students in any city in Australia (one in five people work or study at one of the educational institutions in the city)

Key questions to ask

- How are the Indian government's new education policies affecting operations across the university and colleges?
- What areas of study are growing? Is there any unmet demand? Are there gaps that we can help in addressing?
- What issues are your students most concerned about in relation to international study, or studying in Australia specifically?
- What perceptions exist about Canberra? Is Canberra well known? What can we do to promote Canberra in Mumbai?

ADDITIONAL INFORMATION

- The University of Mumbai is one of India's largest universities (and the world) with approximately 600,000 students. It has 749 affiliated colleges.
- Over the past two years, University of Canberra has expanded its presence across India by establishing close working relationships with various institutes of repute across India, including the following prominent colleges affiliated to the University of Mumbai:
 - Thakur College of Science and Commerce
 - K.P.B. Hinduja College of Commerce
 - K.E.S Shroff College of Arts and Commerce
- Engagement with these institutions has been limited to articulation of the University of Mumbai programs to University of Canberra, resulting in more than 20 students from these institutions choosing UC since 2017. UC is now keen to build on this relationship by broadening the scope of engagement to explore cross institutional partnerships.

- **Thakur College of Science and Commerce**

Thakur College of Science and Commerce was established in 1997, by the founding members, with the notion of providing an avenue of learning within easy reach to the growing young population of Kandivali and its vicinity. It was a natural augmentation by the Thakur Educational Trust. The college has accomplished significant growth over the last two decades of its journey and has emerged as a leading Higher Educational Institution in Mumbai, with more than 8,000 students enrolled.

The College, in a short span of time has realised a number of significant achievements across number of fields including; skill development, entrepreneurial expertise, industry alliance and collaboration with foreign universities.

- **KES Shroff College of Arts and Commerce**

Established in 1989, KES Shroff College of Arts and Commerce is affiliated to University of Mumbai, it is one of the best institutions in the Mumbai suburbs. It is managed by Kandivali Education Society, which was one of the pioneering educational trusts established in 1939.

The College currently offers undergraduate and postgraduate degrees to more than 8,500 students, incorporating technology, innovation and education excellence to create a dynamic and stimulating learning environment for students. With a special focus on self-discipline and building personal character in students, the College helps students shape their future by achieving their academic, personal and career goals.

- **K.P.B. Hinduja College of Commerce**

K.P.B. Hinduja College of Commerce was established in 1974 by late Shri Parmanand Deepchand Hinduja – founder of the Hinduja Group, an Indian conglomerate established in 1914, involved in trading, motor vehicles, banking and healthcare, among other business. Shri Parmanand Deepchand Hinduja believed in setting aside a portion of the profits from his businesses for charitable activities, especially in the field of education and healthcare, which we considered to be the fundamental right of every human being.

Established in 1974 with 400 students, the College now has 7,000 students across 41 undergraduate, postgraduate and research courses. The integration of academic excellence and professional learning is one of the College's unique strengths. The College strives for high standards in the transmission of knowledge within a dynamic and interactive environment, thereby enabling students gain distinction and honour in their chosen fields. An important aspect of the College's education is imparting a social commitment towards society, inculcating empathy towards various sections, working for environment preservation and sensitizing young minds for active citizenship.

Attachment AUniversity Partners

1. 2.2(a)(ii), Principal, KES Shroff College of Arts and Commerce
2. 2.2(a)(ii), Coordinator, KES Shroff College of Arts and Commerce
3. 2.2(a)(ii), Coordinator, KES Shroff College of Arts and Commerce
4. , Assistant Professor, KES Shroff College of Arts and Commerce
5. 2.2(a)(ii), Trustee, Thakur College of Science and Commerce
6. 2.2(a)(ii), Principal, Thakur College of Science and Commerce
7. 2.2(a)(ii), Trustee, Thakur College of Science and Commerce
8. , Trustee, Thakur College of Science and Commerce
9. 2.2(a)(ii), Trustee, Thakur College of Science and Commerce
10. 2.2(a)(ii), Vice Principal, KPB Hinduja College of Commerce
11. , Assistant Professor, KPB Hinduja College of Commerce
12. 2.2(a)(ii), Assistant Professor, KPB Hinduja College of Commerce
13. , Assistant Professor, KPB Hinduja College of Commerce
14. 2.2(a)(ii), Assistant Professor, KPB Hinduja College of Commerce
15. 2.2(a)(ii), Director, Computrain Information Technologies
16. 2.2(a)(ii), Director, Computrain Information Technologies
17. 2.2(a)(ii), Head – Marketing, Computrain Information Technologies
18. 2.2(a)(ii), Branch Manager, Computrain Information Technologies

Austrade

Mr Peter Coleman, Trade Commissioner, Education

INDIA MISSION – SEPTEMBER 2019

BRIEFING NOTE

MEETING:	Reception hosted by Australia Consul-General
DATE:	Wednesday, 4 September 2019
MEETING TIME:	19:00
TRAVEL TIME:	Nil
VENUE:	Taj Mahal Palace
TO BE MET BY:	Mr Tony Huber, Australian Consul-General
ROLE:	Participant and Speaking role
MEETING PROTOCOL:	N/a
PARTICIPANTS/ATTENDEES:	Please see Attachment B
ORDER OF PROCEEDINGS:	TBC
MEDIA OPPORTUNITY	Nil

Overview

A reception with the Consul-General and other invited guests to formally conclude the mission to India.

Meeting objectives.

- to be formally received in India;
- deliver the speech for the reception ([Attachment A](#));
- to network with key figures who deal with Australian-Indian relations; and
- promote Canberra as a leading tertiary education and research destination for persons engaged with the Indian tertiary education system or in key capability areas.

Key messages

- Canberra is home to several highly ranked universities amongst the world's top 100. Canberra is currently delivering high quality tertiary education qualifications across a range of study areas and has been doing so since the 1946.
- Tertiary education is a core foundation of Canberra's economy and our overall wellbeing, with one in six people in Canberra either working or studying at a tertiary institution and the highest proportion of tertiary educated adults, Canberra is truly Australia's knowledge capital.
- The Australian National University is Australia's number one university and is one of the world's top-25 universities, with the University of Canberra ranked as one of the top-50 global universities less than 50 years old.
- The delivery of tertiary qualifications is reinforced by our strong research credentials and world recognised research organisations. For example, Canberra is home to the Commonwealth Scientific and Industrial Research Organisation (CSIRO), the Australian Government's leading research body.

- Canberra is consistently named as one of the world's most liveable cities and is ranked in the top 25 Best Student Cities globally.
- Our city is multicultural, welcoming and safe, with students contributing greatly to our youthful community and vibrant culture.
- Canberra's tertiary education and research sector accounts for roughly 20 per cent of Canberra's overall economy.
- International education is Canberra's largest export, valued at over \$1 billion in the last financial year.
- Canberra's tertiary education system has resulted in thriving economic sectors for key industries:
 - Space:
 - Canberra is at the centre of Australia's space-based research and mission design. It is built on Canberra's highly technical and scientific workforce. Capabilities include communications technologies, satellite ground stations, Earth observation, and navigation and spatial technologies.
 - UNSW Canberra and ANU have significant and complementary space assets, including the Space Mission Concurrent Design Facility at UNSW Canberra and the ANU National Space Test Facilities.
 - In addition, there are local companies such as EOS Space Systems, Geoplex and Geospatial Intelligence, along with significant space research organisations such as GeoScience Australia, CSIRO, the Space Environment Research Centre and the Deep Space Communications Complex.
 - Agricultural technology:
 - There is an emerging agri-technology hub within the ANU/CSIRO Centre for Entrepreneurial Agri-Technology (CEAT). CEAT is an agri-technology hub designed to bring together the research and development capabilities within the ANU and the CSIRO and industry partners in order to translate research into commercial opportunities. Within its first year of operations, the hub has already attracted a number of innovative agri-tech companies, including international ones that have co-located at the Centre:
 - FluroSat, an award-winning agri-tech start-up company, uses artificial intelligence and satellite-based remote sensing to deliver early, accurate and actionable information on crop health and nutrition to farmers. FluroSat has grown from two to 20 employees over the last 18 months; and as part of this expansion, a development team of six staff moved into the CEAT Innovation Hub.
 - Scientific Instruments Australia (SIA) is an innovative company that designs and manufactures instrumentation and software for plant science, biotechnology and agriculture. It has offices and labs at La Trobe University's Research and Development Park in Melbourne and now at CEAT.
 - Goterra is a Canberra-based livestock feed production and waste management firm that delivers solutions for agriculture and provides regionally based, sustainable waste management solutions. The firm is leading innovation on livestock and aquaculture feed by using insects to convert waste. Goterra is actively seeking partnerships and would be a potential collaborator and supplier of fish feed to a major aquaculture farm.

- automed is a developer of medication delivery solutions for livestock producers, including the automed device, which is an automatic, weight-based dosing system for livestock. Its capability includes data-recording capabilities, ensuring producers have lifetime treatment records for their livestock as well as medication inventory.
- Information and communications technology:
 - Based in Canberra, National Computational Infrastructure (NCI) is Australia's leading high-performance data, storage and computing organisation, providing expert services to benefit all domains of science, government and industry. NCI currently houses the fastest and most integrated supercomputing facility in Australia. The facility is a shared initiative of government and the university sector and supports open research for university, government and commercial clients. The NCI in Canberra has significant storage, computational, visualisation and analysis capabilities unique in Australia.
 - Canberra is home to approximately 65 start-ups, SMEs and multinational corporations engaged in cyber activities employing over 4,000 people. Australia's national security agencies which are all located in Canberra, are significant players in Australia's cyber industry.
 - Canberra is home to a pioneering collaboration in innovation between industry, government and the tertiary research and education sector known as the Canberra Innovation Network. This facility has all of Canberra's major universities as foundation partners along with PwC, Optus, Mallesons, CSIRO and the ACT Government.
- Renewable energy:
 - The ACT Government is committed and on target to achieve its 100 per cent renewable energy target by 2020 with a strong focus on supporting distributed energy storage.
 - The ACT Government's commitment has helped draw in over \$500 million investment in large-scale wind and solar renewable infrastructure over the next 20 years.
 - Canberra has the first Australian facility to test 100 per cent hydrogen on existing materials, equipment and work practises to prepare for potential application to the existing gas network. The facility is housed at the Canberra Institute of Technology.
 - The ANU has attracted \$16 million in funding to research hydrogen fuels.
 - Vtara Energy Group Pty Ltd is a Canberra-based technology company and a champion of a bio-based economy. VTARA has proprietary technologies related to biomass-based energy and bio-based refineries, for the production of advance fuels in a Bio-refinery system. Our major projects are located across two states in India; Karnataka and Maharashtra.
- Allied health:
 - The education and health sectors in the ACT together make up approximately one-fifth of the Territory's economy and are Canberra's largest economic sectors after public administration.

- The ACT Government invests approximately \$20 million into health research each year, and another \$18 million per year in supporting health education and training.
- The ACT Government's commitment to supporting health training and research was reinforced by its investment in the University of Canberra Public Hospital (UCPH), a research and training facility located at one of its flagship universities. The UCPH falls under the auspices of the ACT Government's Health Directorate.
- Based on the most recent data, the number of overseas students studying health in the ACT has almost tripled over the last four years (from 160 to 426).

Key questions

- How do Indian students and their families perceive studying in Australia?
- Do Indian students have any particular views about Canberra specifically?
- What are the main priorities for Indian students who seek to study in Australia?
- What are the main selling points for Indian students who seek to study in Australia?

ATTACHMENTS

- [ATTACHMENT A](#) – Speech
- [ATTACHMENT B](#) – Consul-General Guest List

SPEAKING NOTES FOR THE INDIA WELCOME RECEPTIONS

1800 – 1930 MONDAY 2 SEPTEMBER 2019 - AUSTRALIAN HIGH COMMISSION (DELHI); AND

1800 – 1930 WEDNESDAY 4 SEPTEMBER 2019 – AUSTRALIAN TAJ HOTEL (MUMBAI)

Acknowledgements

- Consul-General Mr Tony Huber
- [insert VIPs]
- Distinguished guests, ladies and gentlemen

Key Points:

- Canberra is Australia's education capital – home to six high quality university campuses, with several among world top 100 rankings.
- International education is Canberra's largest export. Indian students are the second largest international cohort, and one of the fastest growing.
- We are a safe and welcoming community with a great student experience, Canberra has ranked among the top 25 world student cities since 2016.
- Whilst known as Australia's seat of government, Canberra has evolved into a vibrant and diverse city with a world class knowledge economy.
- Our economy is growing over 4%, we have Australia's highest incomes, lowest unemployment, and good job opportunities for graduates – in fact, 2 in 3 jobs are now outside of public administration.
- People of Indian background are not only welcome, but leaders in our community – such as Vice Chancellor Deep Saini of the University of Canberra, and Deepak Raj Gupta, a member of our Legislative Assembly.
- Canberra's institutions are also research intensive, we have a strong innovation ecosystem, and are growing the industries of the future.
- These include tourism, space, renewable energy, health, and agri-tech.

- As Chief Minister of the Australian Capital Territory, home to the city of Canberra, it gives me great pleasure to be here with you today.
- As you may know, Canberra is Australia's capital city. We are a young city, just over 100 years old, established after the former British colony States joined together under federation to form the Commonwealth of Australia.
- Indigenous people have lived in the area for many thousands of years, and in modern times we have come from humble beginnings as farm land, to a vibrant modern city that was responsible for relaying the first images of the moon landing and gave rise to the invention of Wi-fi, to name a few accomplishments.
- Whilst awareness of Canberra hasn't traditionally been high overseas, that is now changing. It is an exciting time for the city, on many fronts.
- Our population is around 430,000 in Canberra itself, and 750,000 including the surrounding region. Whilst very modest by Indian standards, in Australia we are a mid-size city, and were one of the fastest growing through 2018. Over 130,000 Canberrans were born overseas, and of these more than 10,000 were born in India.
- Canberra is also, as we like to say, Australia's education capital. Education is a big part of what we do, alongside innovation, research, and growing the industries of the future.
- Canberra's tertiary education institutions focus on providing a high quality, world class education, which delivers highly employable individuals. Whilst the numbers of students we educate are relatively small by India's standards, our real strength is in the quality of education outcomes, the student experience and employability.

- As the national capital we are the seat of government and are involved in facilitating nationwide change. We are home to Australia's decision makers and we have strong expertise in economic management, social policies, science and research, and host Australia's national cultural institutions.
- We have many people of Indian backgrounds in leadership roles building connections and making a difference to our communities.
- The Vice Chancellor of University of Canberra, Professor H. Deep Saini, was the first Australian University Vice Chancellor of Indian background.
- I was pleased to recently welcome Mr Deepak Raj Gupta, who is here today, as a new local member of our legislative assembly and my Government team. Mr Gupta is the former President of the Australia India Business Council, and instrumental in founding the World Curry Festival, now a regular fixture on our calendar.
- By being a centre for government, tertiary education, research and industries at the forefront of an ever-changing global economy, Canberra is uniquely positioned for a city our size to do remarkable things on the world stage. Many people outside of Canberra were surprised when we were named one of the world's most liveable cities – and, now, the most liveable city in Australia – but it was no surprise to us.
- Another factor that sets us apart is the concentration of highly educated individuals across our city. Canberra has the highest education attainment of any state or territory in Australia, with over 50 per cent of working people having a Bachelors or higher degree. On top of this, Canberrans also have Australia's highest average incomes and lowest unemployment levels.

- Tertiary education and training accounts for almost 10 per cent of our labour force and economy, which we know is a great enabler of social and economic progress.
- In the decade since the GFC, we have been diversifying the economy by supporting key capability areas in future growth industries. In fact, 2 in 3 jobs are now outside of public administration, and our economic growth, ‘State Final Demand’, was up 4.2 per cent in early 2019.
- So, Canberra has evolved from just Australia’s seat of a government into a focused, vibrant and diverse city with a world class knowledge based economy. For example:
 - Next year in 2020, Canberra will be 100 per cent powered by renewable energy. This has spurred investment from multinationals in solar and wind technologies, and other innovative technologies like battery storage and energy trading. We have set a target of being carbon neutral, with net zero emissions, by 2045.
 - In the space industry, Canberra is home to 1 in 4 space jobs. Our major universities have the capability to test space equipment, track satellites and deep space missions, and probe the mysteries of the universe.
 - Last year, we opened a new hospital on the University of Canberra campus, where health students are getting experience treating real patients. Nearby is the Research Institute of Sport and Exercise, and the Australian Institute of Sport.
 - The Australian Government spends over \$6 billion per year on ICT services, and we are home to over 1000 companies including multinationals, the national super computer, and an active cyber security community.

- In agri-tech, we are home to the National Environmental and Agricultural Science Precinct, and Centre for Entrepreneurial Agri-Technology.
- On a per capita basis, Canberra has the highest innovation and entrepreneurship metrics in Australia, which has fueled a vibrant start-up culture with various incubation and mentoring programs through institutions such as Canberra Innovation Network, CSIRO (our national research body), Data 61 (in ICT), the Australian Renewable Energy Agency and Agricultural research bodies, and
- International education is Canberra's largest export at just over \$1 billion – up 220% from 2013 to 2018, or 17% annually.
- And focusing on our relationship with international students for a moment. Canberra's international students come from all corners of the world, but India is actually our second largest source country, and certainly one of the fastest growing.
- A big reason for this is quality. We are home to several highly ranked universities amongst the world's top 100 (including the number 1 university in Australia) as well as outstanding options for school and TAFE (vocational education and training). All of our universities, and our vocational or technical college, the Canberra Institute of Technology, rate strongly on teaching and graduate outcomes.
- So, no matter which institution you go to, you can count on Canberra for a world class education, and opportunities beyond.
- As well as reaching for excellence, we are the most active, healthy and one of the safest communities in the nation.

- We are welcoming and very multicultural, with 1 in 4 people born overseas and over 100 embassies our international communities are strong, contribute to Canberra's social fabric and are growing year by year.
- We have ranked among the world's top 25 student cities by QS for four years - ahead of cities like San Francisco, Washington DC, Ottawa or Amsterdam; and Canberra has been rated the best region to live in the world by the OECD – within two hours you can be on a beautiful beach, or at the snow, skiing in winter.
- This year we were rated Australia's most livable city by a popular polling company Ipsos, and we have the highest participation rates in sport and exercise – 70 per cent of our Territory is nature reserves, and the World Health Organisation has rated us in the top 3 cities for air quality.
- Last year, Lonely Planet ranked Canberra third best city in the world to visit, due to hosting Australia's premier national institutions, world class dining and access to some of the best natural settings Australia has to offer.
- And we are now better connected to the world than ever, with daily flights from Singapore and Qatar, and we are working on other cities too.
- Canberra's potential as a global destination has been significantly enhanced with the opening of Canberra Airport as an international aviation hub. 14 international air services land in Canberra each week via Singapore Airlines and Qatar Airways.
- Singapore Airlines flies daily between Singapore and Canberra creating easy connectivity for travelers from many ports across India.

- India is developing into one of the most important international markets for Canberra.
- It is now the fourth largest market by volume behind China, UK and USA. The Indian market provides 6.5 per cent of total international visitors to Canberra.
- For the year ending March 2019, Canberra welcomed a total of 16,880 visitors from India, an increase of 41.4% on the previous year. The market is performing strongly across leisure, visiting friends and relatives and education.
- Increases in international visitors is supporting new business investment. In recent years new city precincts have opened up, the local food scene is diverse and contemporary, and there is an active calendar of festivals and events in all four seasons.
- Our major institutions guarantee accommodation for international undergraduate students, and in most cases postgraduates – and we are building for the future with a large developments in the pipeline.
- In April this year, my Government was delighted to open the Canberra Metro light rail system, and already rider numbers have well exceeded expectations. At the same time we launched new rapid bus routes that go all over the city, and unlike many other Australian cities, ALL our tertiary students get concessional travel – including international students.
- Through the Study Canberra program, my Government is working with Universities, CIT, and ACT Government schools on a range of projects to promote the benefits of studying in Canberra to international, interstate and local students, and ensure they have a great high quality student experience.

- Our goal, is to build on Canberra's reputation as a center for high quality education, world class research collaboration, innovation, employment outcomes, livability and a great student experience.
- And we are proud of alumni such as Vivek Wadhwa, named in TIME Magazine's top 40 influential minds in tech, who studied at UC.
- Australia and India share more than just a love of cricket, common values of democracy, multiculturalism and intellectual endeavor.
- We have a deep and fruitful relationship on many fronts, but I'm sure we'd all agree there is room for growth with many areas of untapped potential.
- Education is front and center of Australia's future priorities with India, and I am here today because I share that vision. My government and the city of Canberra look forward to the exciting opportunities our shared future holds.
- Thank you.

ENDS

ATTACHMENT B – Consul-General Guest List

SR NO	Name of the Corporate	Person
1	IITB Monash	2.2(a)(ii)
2	University of Mumbai	
3	Tata Institute of Social Sciences	
4	Tata Institute of Social Sciences	
5	Tata Institute of Social Sciences	
6	Tata Consultancy Service	
7	Tata Consultancy Service	
8	Tata Consultancy Service	
9	Xavier's College	
10	Xavier's College	
11	Macquarie University	
12	Macquarie University	
13	University of NSW	
14	Bombay Stock Exchange	
15	Oberoji International	
16	Aditya Birla Academy	
17	Narsee Monjee Educational Trust's - Jamnabai Narsee School	
18	Cathedral and John Connon	
19	JB Petit High School	
20	St Mary's High School	
21	SVKM International School	
22	Billabong High International School	
23	Wockhardt Global school	
24	Sulochanadevi School	
25	Podar International School	
26	Nahar International School	
27	Rustomjee Cambridge International School	
28	Bombay Scottish	
29	Ecole Mondiale World School	
30	Mumbai Education Trust	
31	Dhirubhai Ambani International School	
32	Ram Ratna International School	
33	HVB Global Academy	
34	Bombay Cambridge School - Andheri (W)	
35	MISA	
36	Universal School, Ghatkopar	
37	Ryan International School, Kharghar	
38	K.E.S. International School	

39	Panbai International School	2.2(a)(ii)
40	Panbai International School	
41	G D Somani Memorial School	
42	Bunts Sangha's S.M Shetty International School	
43	Shailesh Mehta-School of Mgmnt	
44	Wellingkar school of Mgmnt	
45	ITM group of Institutions	
46		
47	D Y Patil school of Mgmnt	
48	National Institute of Industrial Engineering, Mumbai	
49	S. P. Jain school of Mgmnt	
50		
51	NMIMS University	
52	Jai Hind college of Science	
53	Chetna institute of research and Management	
54	Jamnalal Bajaj Institute of Management Studies	
55	MET institute of management	
56	Amity university	
57	Xavier Institute of Management & Research (XIMR) - Mumbai	
58	Xavier Institute of Management & Research (XIMR) - Mumbai	
60	KJ Somaiya Institute of Management Studies and Research, Mumbai	
61	Sydenham Institute of Management Studies, Research and Entrepreneurship Education, Mumbai	
62	I.T.M. Trust's Institute for Technology & Management	
63	S.I.E.S College of management Studies	
64		
65	K C College of Management	
66	H R College of Commerce	
67	Future Group	
68	CII	
69	CII	
70	Indian Merchant chambers	
71	BSE Institute	
72	Aditya Birla	
73	Zone Start-up	
74	Larsen & Toubro Ltd., Leadership Development Academy,	

75	Institute of Chemical Technology –Centre of learning & Research	2.2(a)(ii)	
76	Tata Chemicals-Centre of Research		
77	HVB Global Academy		
78	Ecole Mondiale		
79	BD Somani		
80	BD Somani		
81	Aditya Birla learning academy		
83	Bikram KS		
84	NIIT Imperia		
85	CII Godrej Center of excellence		
86	Wellingkar Institute		
87	Dhirubhai Ambani International School		
88	Dhirubhai Ambani International School		
89	AIYD		
90	AAERI		

INDIA MISSION – SEPTEMBER 2019

BRIEFING NOTE

MEETING:	MEETING WITH SINGAPORE AIRLINES
DATE:	Thursday 5 September 2019
MEETING TIME:	10:30am-11:00am
TRAVEL TIME:	Nil
VENUE:	Taj Palace Hotel Location TBC
TO BE MET BY:	Mr David Lim
ROLE:	Participate in discussion with Singapore Airlines
MEETING PROTOCOL:	Nil
PARTICIPANTS/ATTENDEES:	<u>Singapore Airlines</u> <ul style="list-style-type: none"> • Mr David Lim, General Manager Singapore Airlines , India <u>ACT Government</u> <ul style="list-style-type: none"> • Mr Andrew Barr • Mr Deepak Raj Gupta • Ms Kaarin Dynon • Mr Brendan Smyth
ORDER OF PROCEEDINGS:	Nil
MEDIA OPPORTUNITY	Nil

Overview

- David Lim is the current General Manager for India and has been in this role since 2016.

Campaign activity in India

- VisitCanberra, in partnership with Singapore Airlines, runs cooperative marketing campaigns in key markets including India to raise awareness of the destination and its key experiences.
- The spend for cooperative marketing with Singapore Airlines for India in 2018/19 was 2.2(a)(xi) 2.2(a)(xi) VisitCanberra contribution and 2.2(a)(xi) Singapore Airlines contribution).
- Planned spend for 2019/20 has been confirmed at 2.2(a)(xi) (including rollover of 2.2(a)(xi) from 2018/19) demonstrating VisitCanberra's continued focus on India as a key market. This amount has been communicated to the India team and campaign planning for the year has commenced.
- Recent marketing activity undertaken in India includes:

Campaigns:

- Three phases of campaign activity in 2018/19, aligned with Tourism Australia's marketing activity, and featuring a mix of print advertising in major newspapers supported by a comprehensive digital buy across Facebook, Instagram and Yahoo. A partnership with trade partner Travel Tours (FCM Travel), accompanied the third phase of the campaign to promote ground packages for Canberra.
 - Campaign Duration: six months over three phases: August-September 2018; November-December 2018; February-March 2019
 - Results:

Phase 1: 12million impressions; 94,223 clicks; 1.567million readers for print reach.
 Phase 2: Facebook ad reach resulted in click through of 19.23% (benchmark 0.02%).
 Phase 3: 17.8% year on year growth for ticket sales during campaign period; 70% for campaign period + 30 days; and 28% for campaign period + 60 days.

Vogue India:

- In partnership with Tourism Australia and Vogue India, VisitCanberra recently hosted top Bollywood actress and first-lady of Indian cricket, Ms Anushka Sharma, for a cover shoot featuring Lake Burley Griffin and the National Gallery of Australia. This project earned significant destination coverage for Canberra across Vogue India's channels, Tourism Australia's channels, and Ms Sharma's own social channels (25.2 million reach on Instagram).
 - Results:
 - 8-10 page cover story in Vogue print – Editorial coverage on Vogue platforms including content on social media channels
 - 4.8 million combined social media reach, + 50,000 print reach

Australia Marketplace India:

- VisitCanberra attended Tourism Australia's Australia Marketplace India (formerly India Travel Mission) from 8-11 August 2019 including one-on-one meetings with 90 key travel trade already actively selling Australia.

Singapore Airlines in-kind:

- 30 second television commercial on Krisworld inflight entertainment with a potential reach of 1.6 million passengers a month. Campaign duration: January – March 2019.
- Double page spread in Silverkris inflight magazine with an approximate readership of 74% of passengers. Campaign duration: February 2019.
- Silverkris online content and banner advertising with expected 290K monthly page views. Campaign duration: January – February 2019

Meeting objectives

The ACT Government would like to discuss opportunities afforded by the daily Singapore Airlines flights into Canberra.

Targeted Outcomes

- To gain an understanding of Singapore Airlines overall India strategy including marketing.
- To provide an overview of Canberra, it's economy and attractiveness as a key tourist destination in Australia.
- Seek ongoing support from Singapore Airlines India to continue raising awareness of the flight to Canberra from India as key market.

Key messages

- Canberra's potential as a global aviation hub is growing. 14 international air services land in Canberra each week via Singapore Airlines and Qatar Airways.
- As a result, Canberra is currently seeing record international visitation and spend. Visitation is being driven by people coming to the capital to holiday, visit their friends and relatives, and for education purposes.
- With significant growth in international visitation and ongoing investment in new tourism infrastructure, the ACT Government is looking for continued growth from the international airlines that connect with Canberra.
- Aviation partnerships are key to reaching identified international markets.
- International co-operative marketing campaigns have been delivered in partnership with Singapore Airlines in Singapore, Malaysia, India, Hong Kong, China and UK.
- Partnership with Tourism Australia allows VisitCanberra to amplify key messages through their programs and in-market teams.

- Spend by international visitors in Canberra increased to \$603 million for year ending March 2019.
- India is developing into one of the most important international markets for Canberra.
- It is now the fourth largest market by volume behind China, UK and USA. The Indian market provides 6.5 per cent of total international visitors to Canberra.
- Visitation from India grew by 41 percent for the year ending March 2019. The market is performing strongly across leisure, visiting friends and relatives and education.
- VisitCanberra has appointed a full time staff member that is based in Tourism Australia's Singapore office. The resource is dedicated to building and managing key relationships and promoting Canberra to Singapore, Malaysia and India.

Sensitivities/Issues

- Singapore Airlines has requested the ACT Government maintain the highest level of confidentiality regarding the terms of the agreement. Briefing material and contracts need to be treated as 'commercial in confidence'.

ADDITIONAL INFORMATION

Past Meetings

- The Chief Minister, VisitCanberra and Canberra Airport met with Singapore Airlines in Sydney on Friday 21 June 2019.
- Meeting was attended by;
 - Mr Greg McJarrow, Area Manager for NSW & ACT
 - Ms Karl Schubert, Public Relations Manager
- The Chief Minister last met with Mr Goh Choon Phong, Chief Executive Officer, Singapore Airlines on 09 July 2018.

Attachments

- Attachment A– Summary International Visitor Survey, year ending March 2019.
- Attachment B– Passenger Card Overview Jan-Dec 18.

MARCH 2019

Visitation to the ACT

2020 snapshot

\$2.5b GOAL: OVERNIGHT VISITOR EXPENDITURE BY 2020

\$2.412b CURRENT: INTERNATIONAL & DOMESTIC OVERNIGHT EXPENDITURE

International snapshot

YEAR ENDING MAR 19



QUARTER ENDING MAR 19



YEAR ENDING MAR 19

LEISURE (HOLIDAY & VFR)



BUSINESS



EDUCATION



ACT'S TOP INTERNATIONAL MARKETS

	CHINA	SHARE OF ACT MARKET 19.6%	\uparrow 11.8%
	UNITED KINGDOM	SHARE OF ACT MARKET 8.4%	\downarrow 1.5%
	UNITED STATES OF AMERICA	SHARE OF ACT MARKET 7.8%	\downarrow 14.3%
	INDIA	SHARE OF ACT MARKET 6.5%	\uparrow 41.4%
	NEW ZEALAND	SHARE OF ACT MARKET 6.3%	\downarrow 7.2%
	GERMANY	SHARE OF ACT MARKET 4.4%	\uparrow 2.8%
	CANADA	SHARE OF ACT MARKET 3.4%	\uparrow 53.8%
	SINGAPORE	SHARE OF ACT MARKET 3.0%	\downarrow 7.7%
	TAIWAN	SHARE OF ACT MARKET 3.0%	\uparrow 82.4%
	MALAYSIA	SHARE OF ACT MARKET 2.7%	\uparrow 0.3%

VISITCANBERRA.COM.AU



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Passenger Card Overview

January 2018 to December 2018 | Passengers aged 15+ | Country of Residence



to



to



Singapore	23%
India	18%
United Kingdom	11%
China/HK	6%
Malaysia	5%
Indonesia	5%
Other Asia	10%

United Kingdom	17%
Germany	8%
France	5%
Qatar	5%
Spain	5%
Italy	5%
Iran	5%
USA	4%
Other Europe	20%

INDIA MISSION – SEPTEMBER 2019

BRIEFING NOTE

MEETING:	TOURISM AUSTRALIA MARKET BRIEFING, ROUND TABLE AND LUNCH
DATE:	Thursday 5 September 2019
MEETING TIME:	11.30am – 2.00pm
TRAVEL TIME:	N/A
VENUE:	The Chambers, Taj Palace Hotel
TO BE MET BY:	Mr Nishant Kashikar
ROLE:	Participate in discussion with Tourism Australia and invited guests
MEETING PROTOCOL:	Nil
PARTICIPANTS/ATTENDEES:	<u>Tourism Australia</u> <ul style="list-style-type: none"> • Mr Nishant Kashikar, Country Manager, India and Gulf <u>ACT Government</u> <ul style="list-style-type: none"> • Mr Andrew Barr • Mr Deepak Raj Gupta • Ms Kaarin Dynon • Mr Brendan Smyth • Mr Ash Balaretnaraja
ORDER OF PROCEEDINGS:	11.00 – 11.30 – India market briefing with Tourism Australia 11.30am – Round table guest arrival and networking 11.40am – Nishant Kashikar, Tourism Australia, opens discussion and introduces guests, Chief Minister and ACT delegation. 11.50am – Chief Minister opening address (talking points provided at Attachment A) 12.00am – Brendan Smyth delivers presentation on Canberra and the region 12.10am – Nishant Kashikar facilitates discussion with invited guests and ACT delegation. 12.30pm – Wrap up and move to lunch. 12.30pm – 2.00pm – Networking lunch.
MEDIA OPPORTUNITY	Nil

Overview

- Mr Nishant Kashikar, Country Manager for India and Gulf, Tourism Australia.
- Tourism Australia will provide a detailed India market briefing for the Chief Minister ahead of the round table.

- Nishant Kashikar will facilitate a one hour round table event with senior agents and distribution partners from the Indian market.
- The round table discussion will be followed by a networking lunch with no additional formalities.
- The event provides an opportunity to promote Canberra and the region to a group of Tourism Australia’s key partners in the Indian market.
- Tourism Australia managed the invitations and event format in consultation with VisitCanberra.
- Confirmed attendees include

<i>First name</i>	<i>Second name</i>	<i>Company</i>	<i>Designation</i>
2.2(a)(ii)		SOTC	President & Country Head - Leisure
		Thomas Cook	CMO
		Beacon Holidays	Director
		Veena World	Director
		NAGSRI	Director
		Singapore Airlines	General Manager – India

Meeting objectives

- Promote Canberra and the region as a destination for the Indian market to senior representatives of the Indian travel trade.
- To provide an overview of Canberra, it’s economy and attractiveness as a key tourist destination in Australia.

Targeted Outcomes

- Support effort to increase visitor numbers from India to Canberra.
- Greater understanding of the ease of connection from major Indian cities to Canberra on Singapore Airlines.
- Foster a greater understanding of Canberra and the diversity of experiences in the city and surrounding region.
- Establish a foundation for ongoing engagement with Tourism Australia and key distribution partners.
- Seek ongoing support from companies represented to sell Canberra and a destination to their client base.

Key messages

- Canberra’s potential as a global aviation hub is growing. 14 international air services land in Canberra each week via Singapore Airlines and Qatar Airways.
- As a result, Canberra is currently seeing record international visitation and spend. Visitation is being driven by people coming to the capital to holiday, visit their friends and relatives, and for education purposes.
- With significant growth in international visitation and ongoing investment in new tourism infrastructure, the ACT Government is looking for continued growth from the international airlines that connect with Canberra.
- Aviation partnerships are key to reaching identified international markets.
- International co-operative marketing campaigns have been delivered in partnership with Singapore Airlines in Singapore, Malaysia, India, Hong Kong, China and UK.

- Partnership with Tourism Australia allows VisitCanberra to amplify key messages through their programs and in-market teams.
- Spend by international visitors in Canberra increased to \$603 million for year ending March 2019.
- India is developing into one of the most important international markets for Canberra.
- It is now the fourth largest market by volume behind China, UK and USA. The Indian market provides 6.5 per cent of total international visitors to Canberra.
- Visitation from India grew by 41 percent for the year ending March 2019. The market is performing strongly across leisure, visiting friends and relatives and education.
- VisitCanberra has appointed a full time staff member that is based in Tourism Australia’s Singapore office. The resource is dedicated to building and managing key relationships and promoting Canberra to Singapore, Malaysia and India.

Sensitivities/Issues

NIL

ADDITIONAL INFORMATION

Recent notable campaign activity in India

- VisitCanberra, in partnership with Singapore Airlines, runs cooperative marketing campaigns in key markets including India to raise awareness of the destination and its key experiences.
- Vogue India:
 - In partnership with Tourism Australia and Vogue India, VisitCanberra recently hosted top Bollywood actress and first-lady of Indian cricket, Ms Anushka Sharma, for a cover shoot featuring Lake Burley Griffin and the National Gallery of Australia. This project earned significant destination coverage for Canberra across Vogue India’s channels, Tourism Australia’s channels, and Ms Sharma’s own social channels (25.2 million reach on Instagram).
 - Results:
 - 8-10 page cover story in Vogue print – Editorial coverage on Vogue platforms including content on social media channels
 - 4.8 million combined social media reach, + 50,000 print reach
- Australia Marketplace India:
 - VisitCanberra attended Tourism Australia’s Australia Marketplace India (formerly India Travel Mission) from 8-11 August 2019 including one-on-one meetings with 90 key travel trade already actively selling Australia.

Attachments

- Attachment A – Talking points
- Attachment B – India Market Briefing

Talking points – Round table discussion

Visit Canberra's key marketing messages in India:

- Recently listed by Lonely Planet as the third best city to visit in 2018, we believe a visit to Australia isn't complete without a trip to its capital city, Canberra.
- Australia's capital, Canberra, provides an incredibly diverse range of experiences within close proximity to each other— whether it's world-class wining and dining, iconic museums and galleries or breathtaking outdoor adventures, everything you're after is just moments away.
- Canberra is a city in a park and a nature-lover's dream. Discover waterfalls, gorges, rivers, lookouts and in winter snow-capped mountains just a short drive from the city centre. Australian native animals and scenic flora are frequently encountered in the city's natural surrounds.
- Canberra's foodie scene is continually gaining attention for all the right reasons. The national capital is spoiled for choice when it comes to cafés and restaurants. Its award-winning status is well deserved, with chefs lovingly creating menus using the freshest, local produce.
- Canberra is the perfect base for exploring the picturesque surrounding region. Within a few hours' drive you can be in Australia's high country exploring the Snowy Mountains, or the beautiful unspoilt coastline of the South Coast. Stop in at quaint country towns, villages and vineyards along the way.
- For all these reason the ACT Government through Visit Canberra promotes the Canberra region as a place that truly offers one good thing after another.

India Market:

- Canberra's potential as a global destination has been significantly enhanced with the opening of Canberra Airport as an international aviation hub. 14 international air services land in Canberra each week via Singapore Airlines and Qatar Airways.
- Singapore Airlines flies daily between Singapore and Canberra creating easy connectivity for travellers from many ports across India.
- As a result, Canberra is currently seeing record international visitation and spend. Visitation is being driven by people coming to the capital to holiday, visit their friends and relatives, and for education purposes.
- With significant growth in international visitation and ongoing investment in new tourism infrastructure, the ACT Government is looking for continued growth from the international airlines that connect with Canberra.
- Aviation partnerships are key to reaching identified international markets.

Attachment A

- International co-operative marketing campaigns have been delivered in partnership with Singapore Airlines in India as well as Singapore, Malaysia, Hong Kong, China and UK.
- The strong partnership with Tourism Australia allows VisitCanberra to amplify key messages through their programs and in-market teams.
- India is developing into one of the most important international markets for Canberra.
- It is now the fourth largest market by volume behind China, UK and USA. The Indian market provides 6.5 per cent of total international visitors to Canberra.
- For the year ending March 2019, India was Canberra's fourth largest inbound market for visitor arrivals. Canberra welcomed a total of 16,880 visitors from India, an increase of 41.4% on the previous year. The market is performing strongly across leisure, visiting friends and relatives and education.
- VisitCanberra leads the ACT tourism industry to create and implement a range of marketing and development programs aimed at raising awareness of Canberra amongst target audiences in key source markets, including India.
- VisitCanberra's target international audience are 'High Value Travellers', as identified by Tourism Australia. These travellers are likely to spend more, stay longer and disperse more. They travel long haul on a regular basis and have a preference for Australia as a holiday destination.
- The visiting friends and relatives of students from India who study in Canberra are also an important market.

Marketing to India:

- VisitCanberra continues to undertake a range of consumer marketing activities in India to raise awareness of the destination amongst target consumers.
- In 2019/20, VisitCanberra will deliver a number of cooperative campaigns in partnership with Singapore Airlines to promote Canberra's range of experiences and daily flight connectivity.
- VisitCanberra will also work closely with Tourism Australia to leverage its campaigns and public relations activities during 2019/20.
- For example, in partnership with Tourism Australia and Vogue India, VisitCanberra recently hosted top Bollywood actress and first-lady of Indian cricket, Ms Anushka Sharma, for a cover shoot featuring Lake Burley Griffin and the National Gallery of Australia.
- Celebrity advocacy is an important marketing medium for India, and this project earned significant destination coverage for Canberra across Vogue India's channels, and Ms Sharma's own social channels.

Attachment A

- VisitCanberra is committed to the continued growth of the India market. It has engaged the ACT Government's first internationally based employee – Ms Jacqueline Lee, Business Development Manager for Singapore, Malaysia and India, based in Tourism Australia's Singapore Office.
- This role is critical for working with trade partners in India, including key travel agencies and online travel platforms, to ensure Canberra can be promoted and booked as part of an Australian itinerary.
- VisitCanberra has successfully established a strong and growing community of more than 120,000 Facebook fans on its VisitCanberra page. VisitCanberra is using this channel to amplify campaign activity in India, including targeted advertising to this fan group to promote Singapore Airlines sales fares.
- Looking ahead there are many new reasons to consider travelling to Canberra with an impressive line-up of major events and blockbuster exhibitions in 2019 and beyond. This includes major sporting events such as the ICC Women's T20 World Cup which comes to Australia and Canberra in February next year. Canberra will host 5 matches in the tournament.

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India Market Update

ACT Chief Minister, Andrew Barr's India visit – Sep 2019

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Contents

- Key achievements
- Trends
- Key initiatives
- The India Opportunity
- The Road Ahead

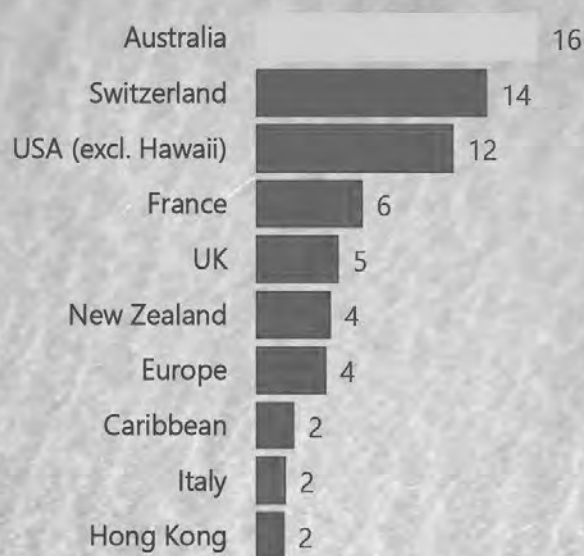
Key achievements

1. India continues to be the fastest growing inbound markets for Tourism Australia
 - Arrivals: 372,000 (+11% YE Jun'19)
 - Spend: A\$ 1.7 bn (+12% YE Mar'19)
2. Five consecutive years of double-digit growth in Arrivals and Spend
 - Arrivals (5-year CAGR): +16%. Spend (5-year CAGR): +18%
3. Achieved top 5 out of region (OOR) ranking in 2018

Sources: International Visitor Survey, Tourism Research Australia.
Overseas Arrivals and Departures, ABS. Consumer Demand Project, BDA Research.

Quarterly brand tracker results (High Value Travellers)

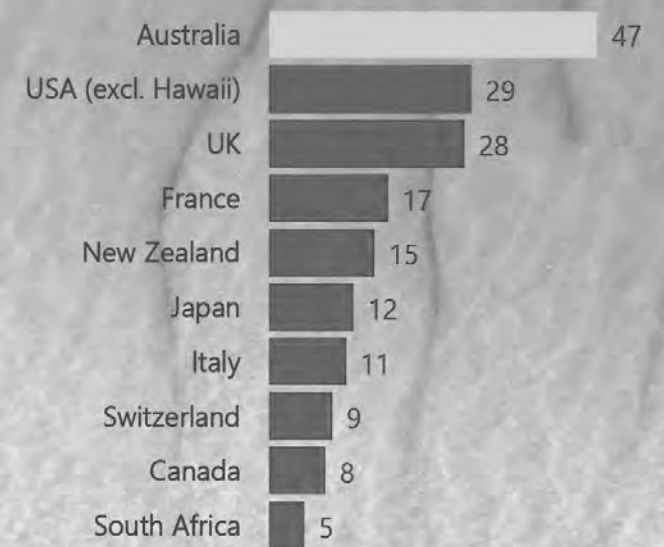
Australia enjoys the highest destination brand index, with highest awareness, aspiration, consideration, intention to visit, and Ad-recall.



DESIRABILITY



FASHIONABILITY



AD RECALL

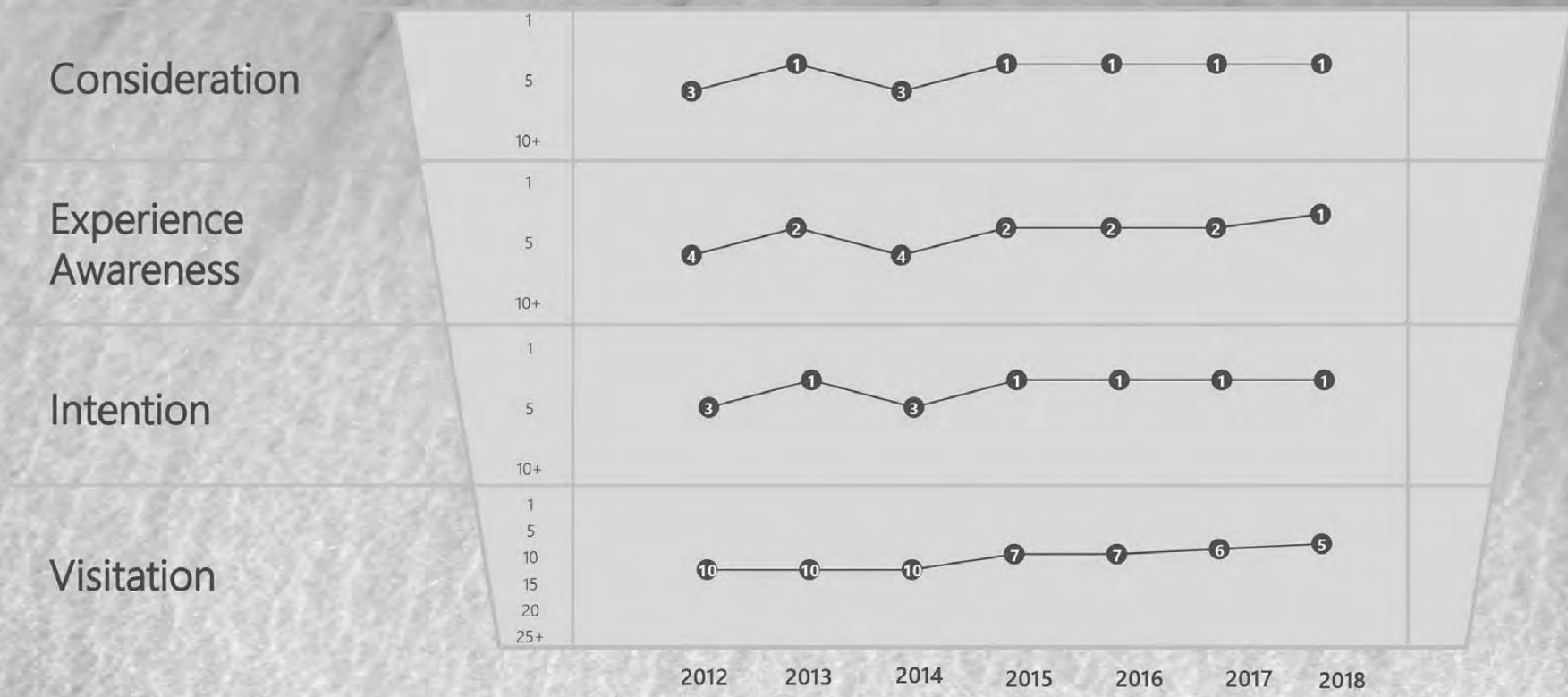




Competitive purchase funnel rankings

Australia is now #1 for intention, experience awareness and intention. Visitation ranking now holding at 5th.

Australia's Competitive OOR Rankings India OOR Travellers



Which of the following destinations are you considering travelling to in the next 4 years? How aware would you say you are of the holiday experiences on offer in the following destinations? Which of the following destinations are you actively planning to visit for a holiday in the next 2 years? Visitation derived from Tourism Economics data YE 2011-2017



India: Consideration & intention

Australia maintains its position as the clear leader, with a big gap to Switzerland (2nd). USA drops back this year, with France and UK now the 3rd and 4th top contenders.

2013: INDIA OOR



2014: INDIA OOR



2015: INDIA OOR



2016: INDIA OOR



2017: INDIA OOR

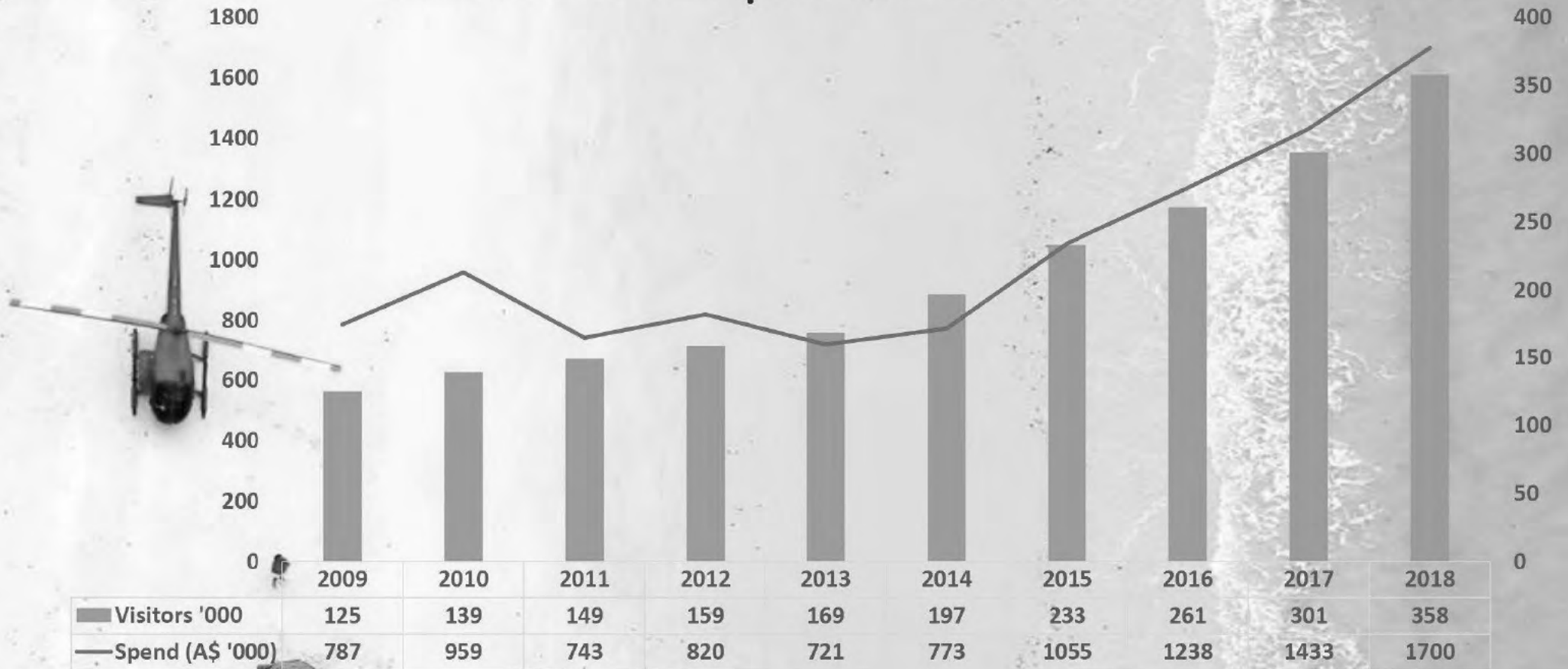


2018: INDIA OOR



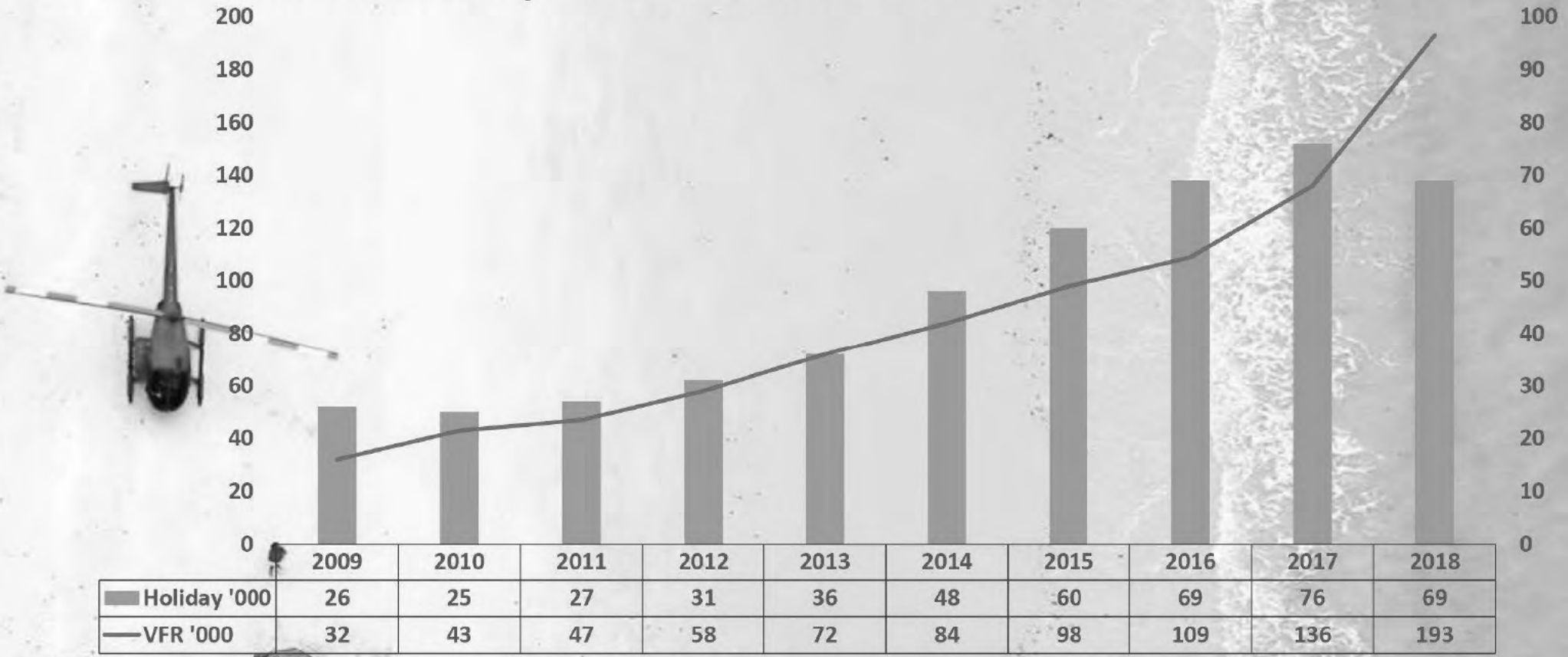
Which of the following destinations are you considering travelling to in the next 4 years? Which of the following destinations are you actively planning to visit for a holiday in the next 2 years? Top 12 destinations are chosen for each origin and CDP phase on the basis of combined consideration & intention. Index: 100 against these 12 destinations only.

Arrivals & Spend: 2009-18



Sources: International Visitor Survey, Overseas Arrivals and Departures, ABS

VFR and Holiday arrivals: 2009-18



Sources: International Visitor Survey, Overseas Arrivals and Departures, ABS

Arrivals by Indian States

Arrivals	Visitors	YOY %	Visitor Share
Maharashtra	63,000	3%	18%
Delhi	46,400	30%	14%
Karnataka	35,800	12%	10%
Punjab	29,350	37%	9%
Tamil Nadu	26,200	0%	8%
Gujarat	18,100	-6%	5%
Kerala	16,800	-21%	5%
Andhra Pradesh	15,300	22%	4%
Telangana	11,700	64%	3%
West Bengal	11,000	7%	3%
Haryana	10,400	12%	3%
Uttar Pradesh	10,000	92%	3%
Chandigarh	9,400	24%	3%

Source: International Visitor Survey, YE Mar 2019

Arrivals by Australian States

State	Visitors	YoY%
Victoria	170,819	9.9%
New South Wales	162,975	4.1%
Queensland	77,123	-3.6%
Western Australia	30,507	8.8%
Canberra	16,880	41.4%
South Australia	15,890	31.6%

Source: International Visitor Survey, YE Mar 2019

Aviation Update



Airlines visitors use to travel to Australia (2017-2019)

Year	2017	2018	2019
Airline name	May	May	May
Singapore Airlines	24.51%	25.18%	24.21%
Malaysia Airlines	12.25%	13.36%	14.26%
Qantas Airways	14.42%	12.42%	10.17%
Air India	12.52%	11.48%	9.68%
Air Asia X	7.33%	7.40%	6.62%
Thai Airways	8.39%	6.20%	6.57%
Cathay Pacific	4.82%	4.11%	5.90%
China Southern Airlines	2.28%	2.74%	4.09%

Source: Department of Home Affairs

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Key Initiatives

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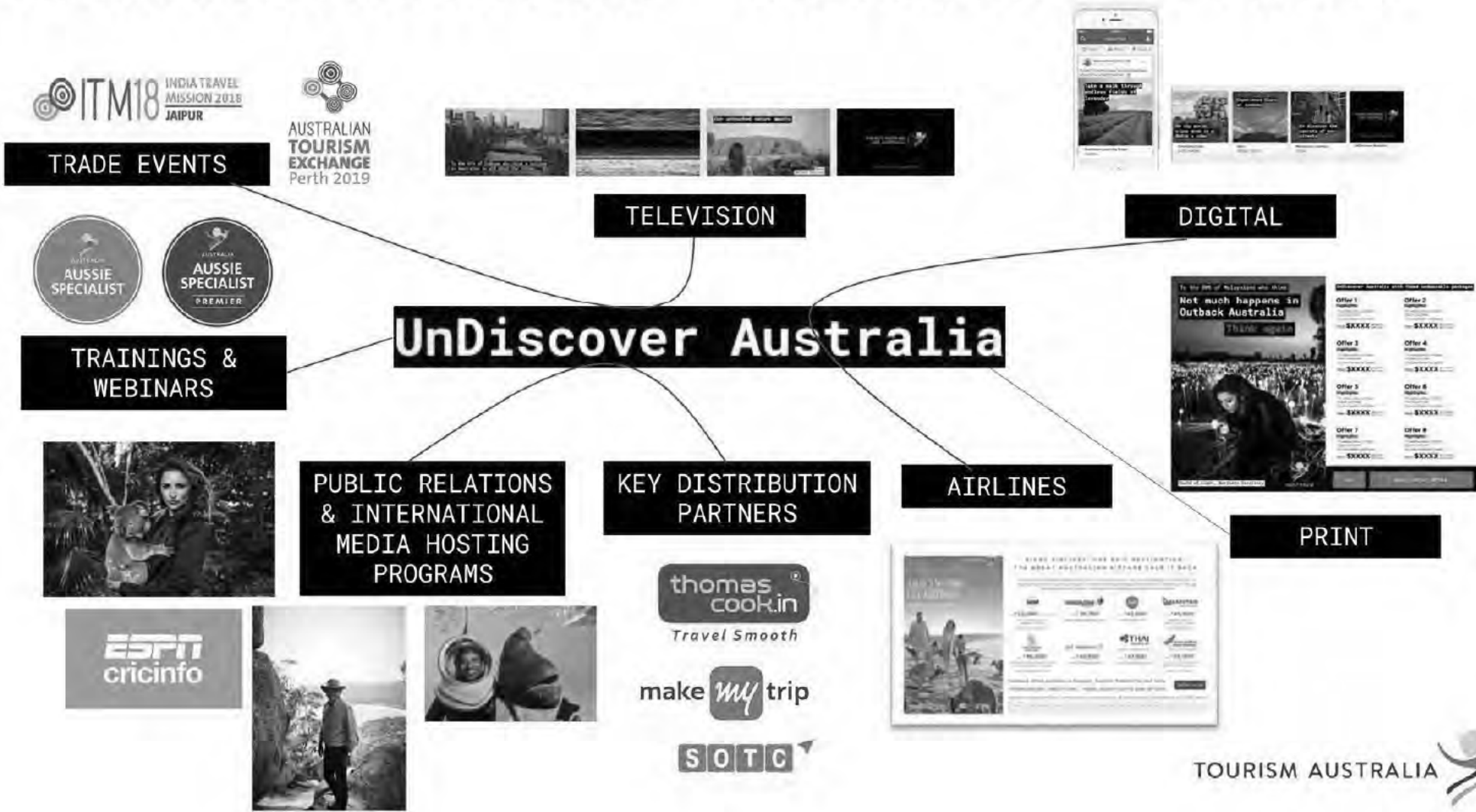
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The collage features a variety of promotional materials for Australia:

- Magazines:** Condé Nast Traveller (Asia & beyond!), Lonely Planet (Great Cities), and Australia (5 EASY).
- Social Media:** Facebook posts from @Australia, @UnDiscoverAustralia, and @TourismAus.
- Events & Sports:** ICC Cricket World Cup 2015 Australia vs New Zealand, Melbourne Amway InQTA, and various travel-related events.
- Travel & Tourism:** Restaurant Australia, World Prostate, and various scenic and cultural images.
- Partnerships:** Logos for ESPN cricinfo, Sony Six, and Sony Liv.
- Other:** yatra.com logo and various promotional photos of people and landscapes.

UNDISCOVER AUSTRALIA – THE ECOSYSTEM MODEL



AND EXTENDED THIS OUT TO INDIA'S CRICKET TOUR OF OZ

Television and Digital Live Stream



ESPNCricinfo



Shibani Dandekar – Host, model and actor

Cricketers & WAGs



FOA Engagement



Media Visits



KDP Partnerships



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Media event
with Shikhar
Dhawan
Reach: 29 Mn
EAV: A\$ 74k



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ESPN
cricinfo

of Videos: 22
Views: 9.9 Mn
EAV: A\$ 2 Mn

TOURISM AUSTRALIA

