

Tourism Marketing

The Millennial traveler to India



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Executive Summary

This research has been conducted in order to find out how the Indian government can use marketing expenditures effectively to increase tourism from Millennials in the Netherlands. The travel and tourism industry is the largest service sector and one of the most important sources of income for India. Within this particular industry, the Millennials cover a large part of all international tourists. They are an interesting generation due to their love for travel; they tend to spend more money on holidays, they prefer longer vacations and are open to new travel experiences. Therefore, the youth travelers can make a significant difference in the growth of the tourism sector.

India has been put on the world map, as a travel destination, by the marketing campaign 'Incredible India' which is responsible for promoting India aggressively by various marketing tools such as advertising. That has been a success since numbers have risen in the Indian tourism sector. However, no specific marketing tools are used for any specific target group. The great position in the Asia Pacific region, the various forms of tourism and the price competitiveness, despite of all these major strengths, India is still behind and underperforms on a few very critical aspects such as safety and security which is the most important criterion for the Millennials to choose their holiday preferences on. The generation Y lives in a digital era wherein the Internet and connectivity are highly essential since sharing content is a must even whilst traveling. However, India's ICT readiness is still not up to the mark. Remote – and rural areas are more preferred than the large cities by the youth traveler, yet infrastructure remains a major issue.

Increase of government expenditures in the tourism market is a positive sign. It is suggested to spend the budget effectively therefore the weaknesses need to be tackled first. It is recommended to invest more in police deployment in order to create more safety and security. Also, improvement of infrastructure (ground, port and air) is much needed to increase the accessibility to certain areas. Brand awareness can be gained by reaching out to the target group putting the right content on various social media platforms, since this generation is frequent users of several social media channels and influences also their decision making in choosing a travel destination.

The implementations should be able to put India in a better position in the T&T industry and also to connect more and attract the youth traveler, who can change the travel scene for India positively.

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Preface

This thesis is the final step toward graduation of European Studies. The idea for writing about tourism marketing is because of my interest in the travel and tourism industry. The choice for a country was not a though choice because of my strong affinition and fascination for India. The combination of these two resulted into the topic for this final research report.

This report would not have been possible without the support and help of a few a people, therefore I would like to express my sincere gratitude to my supervisor Jos Schröder for all the time and effort he has put in to guide, motivate and help me throughout the journey of this final report. Secondly, thank you to all the three interviewees for providing me information and increasing my knowledge about the Indian travel industry. At last but not the least, I would like to thank my family and friends for supporting and believing in me.

Thank you once again,
Narges Raoufi

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Introduction

The travel and tourism (T&T) industry is a billion dollar industry which makes it a very influential economic activity for many countries in the world. In fact, it does not only involve economic phenomenon, but also cultural and social. Basically, tourism is the movement of people from one place to another, preferably outside their usual environment for personal or business purposes. Furthermore, tourism also generates directly and indirectly to economic activity (UNWTO, 2014). Therefore, the tourism industry is a highly important source of income, especially for Asian countries. Developing countries with rising economies such as India, Malaysia, Singapore, Thailand and others are quite dependent on the tourism industry. Not only the national tourism but also the inbound of international tourism can boost up to the economic growth.

The Millennials are the new trendsetters for the T&T industry, with new perceptions, different behaviour and attitude towards travel they are able to make some positive changes for the tourism market in India.

1.1 Problem statement

This report brings the international tourism marketing in focus of the South Asian country India. It emphasizes how India is representing itself in the Netherlands in terms of tourism marketing among the (Dutch) Millennials. The T&T industry is the largest service sector in India. Every year millions of tourists visit the country. However, India is still behind in comparison to other South East Asian countries, like Malaysia and Singapore (Bajoria, 2014).

Nowadays, traveling has become more popular within many different age groups. Tourists have a variety of destinations to choose which does not make it easier. Many destinations are becoming more accessible thanks to cheaper flight tickets by relatively low-cost airlines. All of these are positive signs for the travel and tourism industry, but it also means competition is becoming tougher. Nations have to compete more now in order to stand among the thousands of other travel destinations; a difficult, but not an impossible task.

Within this industry there is a large group of potential people who might be beneficial, not only for India, but for the entire travel and tourism industry. This particular group is called 'the Millennials' also referred to as 'Generation Y', born between the 80s and the year 2000, though it can differ per definition. They are more affluent, more ethnically diverse, have a better education too and most importantly are highly interested in traveling. Not only are the Millennials today's tourists but are also the tourists of the new age. They can be critical in their decision making therefore are not an easy target. However with the right marketing tools and content they can be triggered. It is necessary for India to focus on this group since the Millennials are the future of travel and are actually able to make positive changes within the tourism sector and therefore can add to economic growth for India.

1.2 Research questions

In order to attract more foreign travelers to India, the central research question states:

'How can the Indian government use marketing expenditures effectively to increase tourism from Millennials in The Netherlands?'

In order to answer the central research question, the following sub questions are formulated:

Who are the Millennials and what are their interests?

This sub question will explain who the target group is and what sets them apart from other travelers. In order to understand them better, this chapter will also highlight the interests of the Millennials.

What has already been done in terms of tourism marketing by the Indian government?

Research will be done in order to understand the tourism and travel industry on a global level and also what role it plays for India. Furthermore, it is also necessary to know what India (and the Indian government) is doing to promote and represent itself as a travel destination.

What role do social media play in tourism marketing?

Social media plays an important role in the age of digital technology. Many companies, business and organization are using different channels to create brand awareness through social media. This marketing tool has increased immensely in the last few years and by using it efficiently and effectively, a lot can be achieved in terms of marketing goals.

Which marketing tools can be used for the target group and why?

There are many marketing tools to use in order to promote a product or service in its best way. However, not every marketing tool is necessarily beneficial for every product or service; therefore research will be done to see which tools can be used to reach out to the target group and how India can promote itself by using those marketing tools.

The main objective of this report is how to promote India as a travel destination among the (Dutch) Millennials by using the right marketing tools in a more effective way.

1.3 Methodology

In order to answer the central research question, research was done in many different ways.

Desk research

Desk research was done to create a framework in order to understand the current situation about how India is being promoted currently in The Netherlands. Secondary data was retrieved from academic sources, like literature and articles as well as from websites. However, desk research was not sufficient enough to be able to answer the central research question therefore this report also includes primary data by doing field research. That data consisted of how other (Asian) countries are representing themselves in the tourism sector and what role it plays for the countries in the Asia Pacific region. Also, what the competitive countries are and what India can do to compete with its competitors.

Field research

Quantitative methods were used to design a framework of the target group. As a part of this field research, a survey was conducted among (Dutch) Millennials. The purpose of the survey was to understand the wants, needs and interest of this particular target group. Also in addition to the framework of the current situation on tourism marketing, several interviews were held with a representative of the Indian Tourism Office in Amsterdam, The Netherlands, with a travel agent specialized in India tours and with an inbound travel consultant from India. This qualitative research method gave an in-depth look into the tourism marketing field.

1.4 Research objective

The purpose of this research report is to design a marketing plan which will be able to improve the international tourism of India among (Dutch) Millennials by making use of some marketing tools more efficiently and effectively. In the long run, this can lead to more foreign tourists to India which is profitable for the economic growth of the country.

1.5 Limitations

The target group for this research report is the (Dutch) Millennials. A survey will be held among them to measure their interest in traveling to India. However there are some restrictions for the survey. For instance, due to insufficient time and resources, it is not possible to hold survey in other countries among the same target group (Millennials).

1.6 Outline of the report

The second chapter will outline the theatrical framework in brief. It will design a general overview of the global travel and tourism industry and what it means for India. Furthermore, it will also focus on the target group Millennials, who they are, their characteristics and how they can be reached out to by using social media. Thereafter, there will be a chapter about India. It will explain what kind of a country it is in the Asian region. Also, it will zoom in on a specific aspect, the travel and tourism industry in India. It will be followed by the methodology wherein the research methods will be discussed and explained what methods have been used for this research and also why. Next, the internal analysis of India will be portrayed followed by the external analyses which will include the DESTEP model and a competitor analysis. The outcomes of the interview(s) and survey will be illustrated in chapter seven. The internal and external analysis will be combined that will result in the SWOT analysis in chapter eight, which will also include the confrontation mix. In the following chapter, nine, the marketing mix (5Ps) will be discussed and applied accordingly. After that, conclusion will be made on basis of the outcomes and results of the interviews, survey and findings. In addition, recommendations will be given in chapter 11. This research report will end with a list of the used sources, in APA style and at the end a list of all the appendices.

2. Methodology

This report consists of a central research question with four sub questions. In order to be able to answer each question in a justified way, information was obtained from different sources.

The sub questions are as follows:

Who are the Millennials and what are their interests?

To answer this sub question, firstly desk research on Millennials was evaluated. Then the outcomes of this research were used to develop a questionnaire for a survey among (Dutch) Millennials. After that, the outcomes of the survey were compared to earlier research and from there on transferred into developing a marketing plan.

What has already been done in terms of tourism marketing by the Indian government?

In order to answer this sub question, secondary was collected out of several reports on Indian Tourism. In addition, an interview was conducted with the India Tourism Officer from the India Tourism Office in Amsterdam. This was needed to understand more about the tourism marketing strategy for India, as a travel destination, in the Netherlands.

What role do social media play in tourism marketing?

Data from desk research, in combination with literature research, was collected to know and understand the role of the importance of social media in the travel and tourism industry. Also, the interviews and the outcomes of the survey gave additional information about social media marketing in the tourism sector.

Which marketing tools can be used for the target group and why?

For this sub questions it was necessary to know which marketing tools are available and which ones are applicable to attract the specific target group, therefore the outcomes of the survey and information from earlier research were used to make a selection of the marketing tools that can be useful to target the Millennials with the right content and message.

2.1 Interviews

In this report, several forms of research were conducted. The primary data consisted of three interviews. The first interview was with an inbound travel consultant from India. In addition, information was provided by 'Aman Reizen', a travel agency in Rotterdam. And at last, an interview was done with the India Tourist Officer from the India Tourism Amsterdam which gave more in depth information about the current marketing campaign for India in the Netherlands.

2.2 Questionnaire

Besides desk research, field research was also needed to gain more information about the target group therefore, a survey of in total 16 questions, was conducted among 100 respondents in order to know more about who they are, their interests and their attitude towards travel.

2.3 Models used

Apart from the above mentioned research methods, this report also contain other models for outlining additional information which is relevant for the report.

The SWOT analysis is a frequently used tool to design the internal and external analysis of a company. The purpose of a SWOT analysis is to enable a company to identify the internal (strengths and weaknesses) and the external influences (opportunities and threats) (Businessnewsdaily, 2015).

The DESTEP model was used to explain which aspects can be relevant for the target group and which ones could play an important role in the decision making process of Millennials to choose India as a travel destination.

The confrontation matrix in chapter 8.2 was used to make strategic options by putting the internal and external against each other.

At last, the 5Ps (place, product, price, promotion, people) in chapter nine were used to design a marketing plan.

3. Theoretical framework

This chapter will create a framework wherein more insight information will be given about the travel and tourism industry globally, tourism in India, the target group Millennials, travel trends and social media marketing.

3.1 Global tourism

The travel and tourism (T&T) industry, is one of the largest and most important industries in the world and contributes almost seven trillion U.S. dollars to the global economy. The direct economic impact of the industry generates a positive effect on accommodation, entertainment, transportation and attractions. The less known countries are trying to emerge quickly in order to reap the benefits of the industry (Statistacom, 2016). The tourism industry is a key player generating employment; hence it gives a boost to the country's overall economy as well as to the social-cultural development. Almost every year, the tourism industry has seen a steady growth worldwide. In 2005 there were 528 million foreign tourist arrivals (FTAs) and increased to more than 1 billion in 2013. Europe receives the most international tourist arrivals each year and also produced the most travelers which make it the most popular region. Asia Pacific holds the number two position of popular destination region.

In 2013, the global international tourism revenue had reached a humongous number of more than 1 trillion U.S. dollar; almost twice as much since 2005. Countries like China, the United States and Germany had the largest international tourism expenditures respectively. The direct contribution of the travel and tourism industry to the economy was approximately 2 trillion U.S. dollars in 2013. The direct contribution includes transportation, accommodation, entertainment and attractions like accommodation services, services, retail trade, transportation services, food & beverages and cultural, sports and recreational services. The T&T industry has contributed around seven trillion U.S. dollars to the global economy and will most probably reach the eight trillion in 2014. Moreover, it also makes a direct economic impact of more than two trillion U.S. dollars per annual, making it a highly valuable and profitable industry. The European Union contributes the most, followed by North America and North East Asia. Regions like North and Sub Saharan Africa make a much smaller impact, since the tourism industry in these regions are less developed. However, countries like Namibia, Zambia and Angola can be seen as some of the fastest-growing tourism destinations. A reason for this can be due to the realization of the benefits the travel and tourism can provide for the economy of a country. Perhaps also because of the possible growing popularity and interests tourists show for these less-travelled destinations.

This is not harmful for the well-established destinations since the number of tourists in the US still increases by each year.

The South (East) Asia region is growing rapidly and has attracted a large number of international (European) tourists. According to the stats, the Asia Pacific welcomed 263.3 million tourist arrivals which are more than North America and the Middle East had. This means Asia is doing quite well and competing too in travel and tourism on a global level. The T&T industry turned out to be beneficial for India too. Approximately 113 billion U.S. dollars were added to the GDP in India in 2013, which is a good 5% of India's total GDP. Moreover, the industry provided more than 22 million jobs in the same year. This makes India the second largest tourism market in Asia. The country's biggest competitor is China which holds the number one position. The World Travel and Tourism Council (WTTC) ranked India in the twenty fastest-growing tourism destinations worldwide and were placed eleventh in the list. The GDP of India is expected to grow an average of more than 6% per annual between 2014 and 2024 because of the direct contribution of tourism and travel.

3.2 Tourism in India

The inbound travel of India saw a good increase in 2013; the country had almost 7 million foreign tourist arrivals (FTAs). This was a large increase compared to the year 2000 that had only 2.5 million FTAs. Most of those visitors were from the United States, followed by tourists from the United Kingdom.

Out of 20, India is positioned on number eleven in the list of fastest emerging tourism destinations worldwide for 2014 to 2024. This means India is not even in the top 10 whereas competitors like China are on the fifth and Thailand on the ninth position. China had a 7.3% annual growth rate to the GDP by direct contribution of travel and tourism and Thailand 6.7%. India lacked only 0.3% and was therefore not included in the top 10. However, this does not mean India is not growing. On the contrary, it was ranked second highest (22.3%) on the list of countries with the highest employment rate in the travel and tourism industry. Despite being second (China at number one), India left other competitors like Thailand and Indonesia behind.

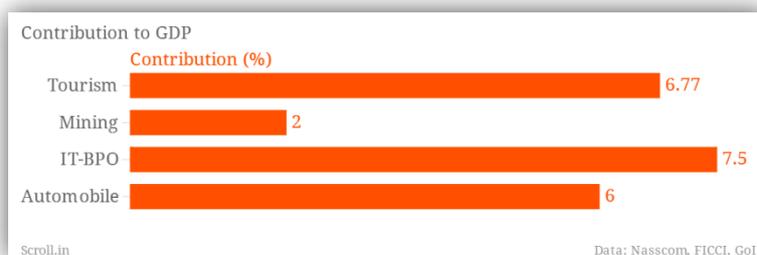


Figure 1 – Contribution to GDP. Data: Nasscom, FICCI, GoI

Figure 1 (above) shows the direct and indirect contribution of the travel and tourism for India. According to a study, the tourism and IT industry contribute almost equally to the GDP of India. Still, India’s competitor Thailand gets more visitors. Despite its less popularity compared to the competitors, the tourism industry remains highly important for the country. The data of the Ministry of Tourism has shown that the travel and tourism industry does indeed have a significant impact on the Indian economy (Venkataramakrishnan, 2014).

As mentioned before, the employment rate has also seen a rise due to the travel and tourism industry. As noted, the Tourism Satellite Account has shown a 4.4% direct share rate of employment in tourism services industry. That can go up to 10% if including the indirect share too. Figure 1.1. below shows the Foreign Tourist Arrivals (FTAs) from the year 2004 till 2013 in India. It started with 3.5 million in 2004 and doubled in 2013. Although the numbers have increased, still it does not give India a reason to rejoice.

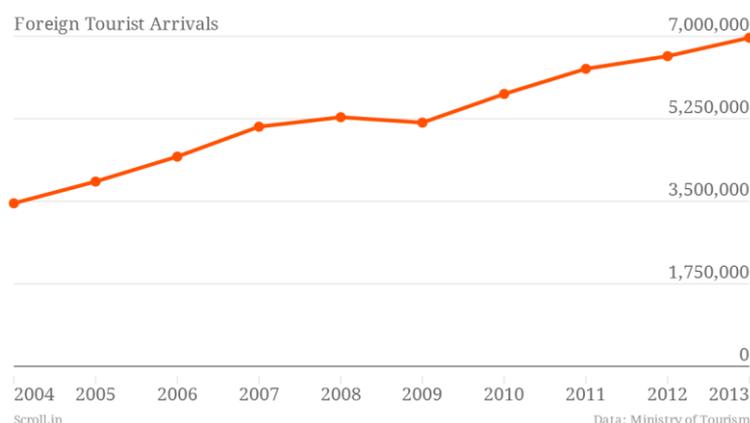


Figure 1.1 – Foreign Tourist Arrivals. Data: Ministry of Tourism

Figure 1.2 (below) shows the FTAs in India in percentage. It started off with 26% and decreased to approximately 6% in 2013, this decrease is truly a matter of concern for India as a travel destination. The economic crisis of 2008 can be seen a reason for this dip, since India received 2.2% less tourists than the year before, but the country itself has many reasons too for the decrease. For instance, visa and paperwork problems are still an issue as well as infrastructure. And there is more; not only do the foreign tourists complain about the above mentioned issues, the concern for safety has also risen in the last few years. Especially female tourist can feel uncomfortable after the numerous of worldwide known rape stories in India.

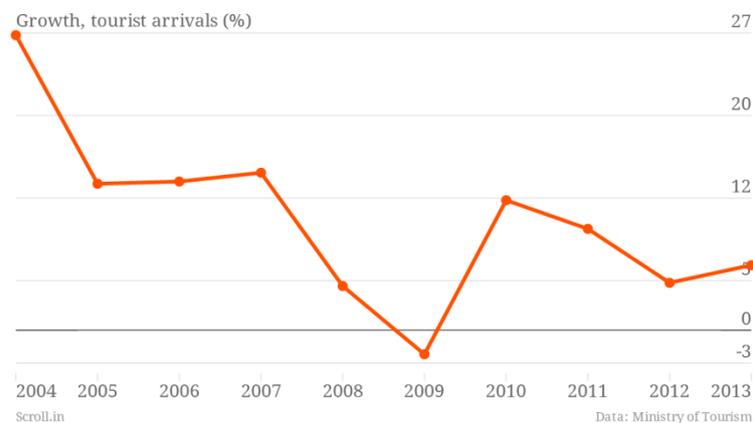


Figure 1.2 – Growth FTAs in %. Data: Ministry of Tourism

The domestic issues are not to be taken lightly, because those are mostly the main reasons why India is still receiving much less FTAs than a few other smaller nations. Figure 1.3 (below) shows India is at the bottom compared to other (Asian) nations. China tops the list but the shocking part is that smaller nations like Thailand and Vietnam, even though having a bad economy, receive much more FTAs than India; the tourism in India is still underperforming (Venkataramakrishnan, 2014).

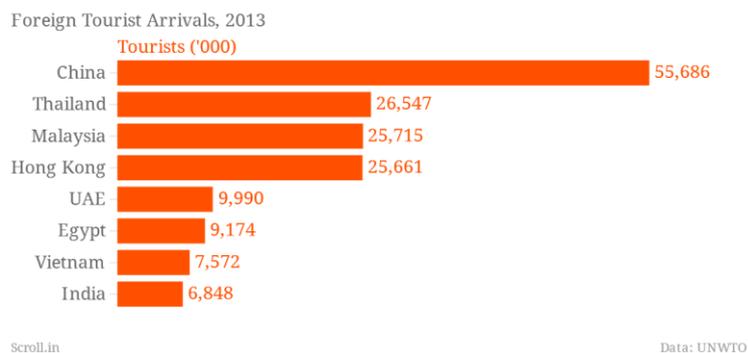


Figure 1.3 – Foreign tourist arrivals, 2013. Data: UNWTO

The travel and tourism industry is a competitive industry. Each and every country constantly tries to bring out the best in order to attract more tourists. The competition is tough on a global scale but the competitiveness per region is even tougher. A huge country like India is facing a rough competition from other south (East) Asian countries like China, Japan, Singapore and Indonesia. Surprisingly, the South-East Asian regions have grown the most in terms of international arrivals due to being highly price competitive in natural capital. Not only this, but the government has understood the importance of a better regulated visa policy. The ASEAN countries are already working on visa facilitation; the aim is to create a visa wherein tourists will be able to travel freely in all the 25 member states. If the pilot of this visa implementation succeeds then, according to the UNWTO, the ASEAN countries can expect an increase of up to 10 million visitors.

3.3 Millennials

The Millennials, also being referred as Generation Y, are a generation born roughly between the year 1980 and 2000, the largest in the Western history. The Millennials play and make a significant difference in the travel and tourism industry; nearly 200 million of all international tourists are young travelers who belong to the Millennials. They generate over 180 billion U.S. dollars in annual tourism revenue (UNWTO, 2012).

The Millennials are born to travel the world and genuinely value travel, especially the international journey. They believe in a good work-life balance, which is why they take all the vacation time they can. They share and spread this excitement for travel to the people they are surrounded by, for instance to their parents. These young travelers tend to change the meaning of international travel as well, since their taste and preferences are different than other generations.

“Millennials are growing up in a world where travel is easier and relatively cheaper than for previous generations and they are taking full advantage of this to travel the globe in search of new experiences,” David Chapman, Director General at WYSE Travel Confederation.

The Millennials have grown up in a world of digital technology; a first one in history. The digital era has shaped their social and cultural attitudes. Some traits are the same as their predecessors and some traits are unique that makes them different. Social media is a part of that digital world and plays an important role in the lives of today's youth. They are a generation who is very involved and interactive on social media which is why they are constantly engaged in content and new information. A smartphone is absolutely a must in their lives; a Millennial checks their smartphone an average of 36 times per day in Europe which is even more than in the United States. Millennials prefer targeted content means they want content related to their field of interests. Preferably, content and/or information should be easy to get and should not take too much time. Not only do they follow certain content but they also like to share what they like on social media. A study has shown that a Millennial shares content on social media six times on average per day and five times per email. This makes social media the most used channel for sending out and circulating content and also a main channel for new discoveries. They are immensely engaged in technology, due to the digital and computer era means everything has to be available at anytime and anywhere (Solomon, 2014).

The Millennials are a potential target group for the travel and tourism industry. Research from Correndon has shown that youth travelers spent mostly their money on food. As mentioned in the previous paragraph, Millennials want constantly to stay connected with the world. Wireless internet, Wi-Fi, plays an important role in their decision making for a travel destination. More than half of the respondents have indicated to choose their travel destination depending on Wi-Fi availability or not. Therefore, even on a holiday, the majority uses social media on daily basis which is not surprising considering the importance they give to social media. Among social media channels, Facebook is the most popular especially within the age group of 18 to 29 years. Twitter, Instagram and LinkedIn are being used too but not as frequently as Facebook. A large part of the youngest age group (18-29) is not active on any social media channel. Safety and security does not seem to be a priority for the Millennials since only 56% check the travel advice for the chosen travel destination.

3.4 Travel trends by Millennials

Throughout the years, a lot is being researched about the Millennials; their characteristics, preferences and travel habits. This sub chapter will give a short but essential overview about some interesting facts of the Millennials. The first set of findings are from a survey conducted in 2014 by The World Youth Student and Educational (WYSE) Travel Confederation, a not for profit organization in Amsterdam, The Netherlands.

- The organization estimates young travelers will take 320 million international trips by 2020 which will be a tremendous 47% increase from 217 million in 2013.
- Young travelers are more interested in exploring remote areas, staying in hostels instead of hotels and also backpacking trips are a favorite. The typical sun, sea and beach holidays are passé.
- International trips are not only meant for leisure but are also used as a form of job training, study opportunities and to gain more work experience.
- Family and friends seem to be the most influential source of information for more than 65% of the respondents.
- Travel reviews seem to have an influence on the decision making and more than half of the respondents share their own travel review too after a trip.
- Money wise 50% of the Millennials tend to spend more than 1000 euros for a trip, which is an average of 100 euros more than other international tourists.
- High usage of mobiles; 43% checks their mobile phones every five minutes.

Another research was done by Chase Card Services with led to the following results:

- Almost all Millennials share their experiences with friends while traveling and do post on social media too.
- Social media is being used to ask for travel opinions by 44% of the Millennials and 73% post on social media on a daily basis while traveling.
- Millennials prefer to book an accommodation near public transportation. A noticeable difference between older travelers who rather stay close to airports or landmarks.
- The youth travelers are also interested in more pet-friendly accommodations.
- Smartphones are often used for doing research about traveling, travel destinations and online bookings.

There is a lot more in addition to the above mentioned facts about Millennials and their love for traveling. Many Millennials choose a longer vacation, with an average trip length of 58 days, that is able to give them more immersive experiences instead of the typical one or two week vacations.

Backpacking seems to be loved by many Millennials since it is apparently the biggest money spender among the youth travelers. Another characteristic is that the Millennial prefers more unique experiences therefore opt to visit remote areas and less traveled destinations/places instead of visiting the larger cities. Also they are more likely to spend the night at hostels and low budget hotels than luxury hotels. Millennials value the cultural aspect of traveling too; they might choose to travel to places where they will be able to interact with locals in a meaningful way. This generation of travelers has a different attitude toward travel; they do not see any point in waiting since they have the time and money, therefore they are ready to see as much as possible from the world and to make memorable unique travel experiences.

3.5 Social media marketing

The travel and tourism industry is not only one of the biggest but also a very competitive service sector. In order to develop the tourism industry in any country it is important to provide good infrastructure, improve the service quality and also to increase customer satisfaction. A marketing campaign is meant to gain loyal and long term customers. There exist different types of instruments and channels in the marketing world in order to achieve the desired objectives. In the digital era, social media plays a crucial role in the successes of businesses. It is a good way for businesses to stay directly connected to their customers. Marketers have become aware that social media is a powerful way to engage more with customers and also to generate more brand awareness; therefore they should select the right social media platform, design the right content and engage the right users. By choosing the right channel and sending the right message chances are higher for a successful marketing campaign. In today's world social media channels like Facebook, YouTube and Twitter are the best and effective platforms for marketing the travel and tourism industry (Tourism Review team, 2013). This type of marketing is rather inexpensive, which is an advantage for small size businesses, and also give the tourism industry a chance to engage with its customers in a more personal way. Furthermore, the customers and visitors are led to the right information by social media and tourist companies can provide their customers with personalized messages and content.

3.6 Preliminary conclusion

The travel and tourism industry is one of the largest sectors in the world and plays an important role for economic growth, especially in developing countries. India is one such country in the Asia Pacific region where the T&T industry is the second biggest sector. India has seen a rise numbers thanks to the 'Incredible India' campaign, an initiative by the Indian Government to promote the country as a travel destination in foreign countries. Despite of all efforts, India is still behind its competitors like Thailand that has relatively a smaller economy.

The Millennials are potentially an interesting target group for the T&T industry; approximately 200 million of all international travelers belong to Generation Y also known as Millennials. Due to their love for traveling, the Millennials have set new travel trends throughout the years; traveling to remote areas, backpacking, staying longer at a destination and also spending more money than previous generations. All these characteristics can be profitable for India since the country has the potential to offer various forms of tourism. The Millennials have grown up in a digital world wherein the internet, social media and connectivity play a big role. It is very important for them to stay connected throughout their travel journey because travel experiences are shared through social media platforms too. In short, the Millennials have changed the travel scene with their behavior and attitude towards travel; a target group that can change the travel and tourism scene for India positively.

4. India

India, officially known as the Republic of India, is located in South Asia being the largest democracy in the world with a population of over more than one billion. China is a neighbor country on the northeast with Nepal and Bhutan on the north. In the west it borders with Pakistan and Bangladesh, and Burma on the east. Having New Delhi as its capital city, the country has other larger cities too such as Mumbai, Chennai, Calcutta, Hyderabad and Bangalore. India is a country with many entities in culture, religion, languages and history, which makes it a rich country in terms of diversity.

The tourism industry is the largest service sector in India, thus making this an important source of income. The tourism can be classified in four categories; North Indian Tourism, East Indian Tourism, West Indian Tourism and South Indian Tourism. Each part of India differs from the rest of the nation. Putting all this together, it has become a brand called 'India Tourism'. The tourism sector has seen a rise in numbers in the recent years due to the improved connectivity to and from the country (CCI.in – tourism report 2015). Moreover, the policies and changes implemented by the Indian Government have also contributed to the boost of Indian tourism and hospitality industry, hence attracting more foreign visitors. However, India is still behind in comparison to other (Asian) countries; it only attracts approximately three million international visitors. Main drivers behind the increase of tourist traffic in India are as follow:

- Successful campaign of 'Incredible India.'
- Development of Rajasthan and Kerala as popular travel destinations with their own distinctive brand image.
- Value for money/economical holiday destination.
- Business cum pleasure destination.
- Better connectivity with many countries with India due to the aviation policy 'Open Skies Policy.'

The economy of a country can be boosted by promoting itself as a prime tourist destination. Therefore, a country has to invest in building infrastructure, maintenance and also marketing. The latter plays a very crucial role in building a brand image for a destination country. The Government of India realized the importance of tourism and therefore certain policy measures; Tourism Policy 1982, seventh five year plan 1985-1989, Tourism Plan of Action 1992 and the five year plan of 1992-1997.

The policy of '82 focused on the development of travel circuits and assigned the responsibility of promoting international and domestic tourism to the Central Government and State Government respectively.

The seventh five year plan of 1985-1989 included:

- Aggressive promotion of domestic tourism.
- Emphasis on creating more beach resorts.
- To create various options for international tourists such as trekking, winter sports and conducting conferences and conventions.

A few years later, The Tourism Plan of Action 1992 was introduced. The main objectives of this plan were:

- To improve the economy by domestic tourism.
- Social and economic development of tourist areas.
- To keep the environment and the national heritage.
- Encouraging international tourism.
- To improve India's share in world tourism.
- To generate more employment in the tourism sector.

These policies of 1985-1989 improved the tourism in India, therefore it continued with the eighth five year plan (1992-1997). This plan was to increase the participation of the private sector in the tourism sector. The various policies were:

- To develop tourists places.
- To develop other forms of tourism such as winter sports, wildlife and beach resorts.
- To bring back the projects of national heritage.
- To provide economy class accommodation in tourists centers.

The forecasts are that the tourism industry will contribute to India (in GDP) by a rise of 7.7% in the time period of 2012-2022. Furthermore, it also contributed to the employment generation in 2011 by 5% and in the future it will probably contribute even more to the total employment by 2022.

One of the main reasons why India is still not as popular as other South Asian countries is because tourists are put off by the unhygienic condition of the country; especially the pollution in the larger cities is a major issue. Moreover, the political tension with Pakistan and the attacks is also what scares the visitors (voorbeginnersinfo.com, 2014). However, India is trying hard to tackle these obstacles. According to the Minister for Culture and Tourism and Civil Aviation, Mahesh Sharma, the government makes Indian tourism a top priority having the main reason to boost the economy.

Currently India has only a mere 0.68% share in the world tourism which is significantly less and therefore they aim to raise that percentage to 1 by 2020. India's competitors Maldives, Singapore and Malaysia are thriving high on tourism while India still lags behind. The vastness and diversity of India bring the country in the advanced position to offer different forms of tourism, in different seasons, which can be attractive to foreign tourists. On one hand India possesses seas, ocean, mountains, rainforest, deserts, valleys, lakes and national parks; all being seen as natural treasures. On the other hand, foreign tourists do also have the options to choose among adventure and rural tourism, cruise tourism, sustainable/eco-tourism and medical tourism.

➤ *Rural tourism*

In 2002-2003 the Ministry of Tourism started a scheme of rural tourism in order to showcase art, rural life and culture to tourists in the villages and rural locations. The intentions were to help the local community economically and socially, but also to facilitate interaction between the local people and the foreign tourists. The Ministry of Tourism sanctioned 169 rural tourism sites in 28 States in 2011. This segment has been doing well ever since; it won the Pacific Asia Travel Association (PATA) award for the best Heritage in 2010.

➤ *Cruise tourism*

This form of tourism is gaining more popularity on a global level in the leisure industry. India can be a wonderful tourist destination for cruise tourism due to its vast coastline, beautiful beaches and paradisiac islands. The Ministry of Shipping initiated The Cruise Shipping Policy, which was approved by the Indian Government in 2008, had the objectives to make India more attracting for cruise tourism and also to attract the right segments of foreign tourists to cruise ship in India.

➤ *Adventure tourism*

Tourists who prefer this kind of tourism like to explore and travel to remote and/or exotic areas. The popularity is rapidly growing since tourists seek different kind of vacations.

➤ *Wellness tourism*

This type of tourism is meant to achieve, to promote or to maintain maximum health and a sense of well-being. India has a medicine system consisting of Ayurveda, Yoga, Rejuvenation therapy and others are one of the most ancient systems of medical treatment, therefore India is a potential market for the health tourism industry.

➤ *Medical tourism*

India is one of the most profitable medical tourism markets in the world. Governmental policies and initiatives, less waiting time and healthcare infrastructure have helped and supported the growth in this sector which can be beneficial for several associated industries like hospitals, medical equipment and pharmaceutical industry.

As mentioned in the previous paragraph, hygiene is a factor that works against India in terms of gaining tourists. The Prime Minister of India, Narendra Modi's vision of a clean India should be able to change the image of an unhygienic India. Two other main key elements are safety and security. Again, according to Sharma, the government is also working on these two issues. A lot of attention is being given to security and it is also in touch with state governments.

4.1 Incredible India

The competition within the travel and tourism industry can be quite fierce to attract international tourists to countries. Proper marketing and promotions can lead to tourism growth in a country. A well-known international campaign is 'Incredible India' which started in 2002-2003 initiated by V. Sunil and Amitabh Kant, joint secretary of the Ministry of Tourism. With an overseas network of 18 Government India Tourism Offices, the main objective of the campaign is to create a distinctive identity for India; to gain more foreign tourists and also to increase the share of India in the global tourism market. These objectives can be achieved by an integrated marketing and promotional strategy, and of course a well understood association with the State Governments, Indian Missions and Travel Trade. The campaign hit off a great start generating an increase of 16% in tourist traffic in its initial year, thus a good start in establishing India as a popular travel destination.

In order to create more brand awareness, to promote and to showcase the tourism products of the country, the Indian Tourism offices in overseas have attended and participated in the major international travel fairs and exhibitions; ITB Asia in Singapore, Arabian Travel Market (ATM) in Dubai, World Travel Market (WTM) in London, ITB in Berlin to name but a few (Ministry of Tourism India, 2015).

In order to promote tourism destinations in India in international markets overseas, the Ministry of Tourism undertakes marketing activities such as advertising. Some of these advertisements cover many regions too and are not necessarily country specific. The expenditures for such promotions and marketing activities come from the budget, which is allocated under the Restructured Scheme of Overseas Promotions & Marketing Development Assistance (OPMD). The stats show expenditures were the highest in the year 2013-2014 with more than 195 crores (Indian rupees). Currently the number for 2015-2016 is at 25 crores (Indian rupees). In addition to those costs, the Ministry of Tourism also provides financial help to the State Governments to promote fairs/festivals and rural activities in the country. These fairs and festivals give cultural glimpses of the different States to foreign tourists and also generate local income and employment, therefore these fairs and festivals play a very positive role in tourism development.

The Indian government is spending a big amount of money on tourism marketing. However, India still does not manage to reach the 10 million foreign tourists. An article by C. Narayan (Business Today, 2015) stated that the less foreign tourist arrivals could be due to the negative visa experiences by tourists and also lack of good infrastructure; mainly poor connectivity between big international – and smaller airports. For instance, Jaipur and Bhopal have good airports, but due to lack of collaboration between airports and airlines, no low-cost airline wants to fly to these cities, which can potentially be beneficial for the tourism growth. Regarding the visa issue, A. Jaitley (Finance Minister) has promised to extend visa on-arrival facilities to 150 countries. These facilities used to be possible in only 43 countries but apparently it turned out to be positive for the inflow of foreign tourists to India. It is yet to be seen whether the planned visa facilities will indeed improve and increase the tourism.

5. Internal analysis

The internal analysis of a company or organization, in this case India, is meant to give a clear picture of what India has to offer (strengths) as a travel destination. Also, what India still needs to improve on (weaknesses).

5.1 Strengths

The biggest democratic nation India, is not only a key player in the South (East) Asian economy but is also quite popular among travelers from all over the world. According to the WTTC, India possesses a competitive advantage with its mystical attraction with an ancient civilization and culture. Nature wise the country has a lot to offer from the world's highest mountains, a vast coastline with beautiful beaches, rich tropical forests to a captivating wild life. The diversity in culture with an authentic cuisine adds to the beauty of India.

1. Wide range of natural attractions

India has a vast coastline with beautiful beaches, waters, lakes and rivers. Furthermore it has deserts, national parks and waterfalls.

2. Investment in infrastructure

Infrastructure is another key player for the Indian tourism industry, thus for the economic growth. Extensive investment in the development of infrastructure will be able to extend and modernize services, but also to improve the safety and to decrease the overcrowding. A good rail network in combination with an extensive range of airports should make it easier and less expensive for travelers to travel to and around the country.

3. Strong location in the Asia Pacific region

India is the second largest country in the Asia Pacific region after China. It fills a major part of the South Asian subcontinent together with six other countries that are India's neighboring countries; China, Bhutan, Nepal, Bangladesh, Pakistan and Sri Lanka. These regional connections make it attractive for a traveler not to only travel through India but also to visit other countries in the South East region.

4. Price competitiveness

India is one of the most inexpensive nations in the world where the cost of living is almost 68% lower than in The Netherlands. Restaurants, groceries, clothing, fuel and more are much cheaper for travelers from The Netherlands. The low labor costs and service costs are also an advantage. The competitiveness index (table 1), showed that India scores well on price competitiveness in comparison to other nations in the Asia Pacific region.

5. Other forms of tourism

As mentioned in chapter four, India offers a variety of different tourism such as wellness, medical, wildlife/nature and rural tourism which should attract different kinds of travelers.

6. Knowledge of the English language

English is a widely spoken language in the world. Due to India's history, of being a British colony, the language is spoken by a large group of Indians. It is commonly used in higher education, corporate world and politics, hence is seen as one of the many official languages. Needless to say, this is a big advantage for India in the travel and tourism industry. Today's travelers, especially Millennials, are very familiar with the language and do speak a high level of English too. All this makes traveling through India easier and more convenient.

7. Increase of government expenditure in tourism sector

More investment in the T&T industry, by the government, means India wants to improve its position in the travel sector and also a travel destination.

5.2 Weaknesses

India, being a developing country with a rising economy, might have some solid strong points and advantages to offer as a holiday destination but it also copes with some major weaknesses whereby it makes the country look less attractive. Among the competitors, India lags behind in a lot of aspects:

1. *Infrastructure in rural and remote areas*

The rural and remote areas are still underdeveloped and not easy accessible, therefore it limits the potential of tourists to visit these areas.

2. *Safety and security*

On a national level, the security in India is under threat from regional terrorist groups. The safety factor is also of concern in India for travelers, especially female.

The many news items of rape, harassment and sexual assaults cases on women are known worldwide which does not portray a good image of India. Furthermore, foreign tourists have been victims of robbing, which is another reason to keep foreign tourists away.

3. *Corruption*

A widespread issue in India is corruption and bribery. The Indians themselves have said that their country is not able to move forward due to corruption. The relationship between private sectors and the state is not good and often corruptions lead to the wrong decisions.

4. *Hygiene*

The low level of cleanliness is another significant unattractive factor. A large part of the population is poor and live either on the streets or in slums – this kind of poverty does create an unhygienic environment for tourists.

5. *Airlines*

This factor can be seen both as strength and a weakness. As noted, Gour Kanjilal (2007-2008), explains that airports are the primary infrastructure facility of any country to offer the tourists. Needless to say, this transport is less time consuming and the domestic flight rates are rather cheap, hence for many it is a most preferred mode of transportation. On the flip side, popular holiday destination like Goa and Jaipur do not have an international airport. Tourists have to travel via Mumbai to reach their final destination. This is time consuming and a major weakness since this can highly effect the tourist's decision of whether to visit those places or not.

6. *ICT unready*

The index score for ICT readiness shows that India is also very much behind with technology, despite having a strong IT market.

5.3 Sub conclusion

The government of India has set the T&T industry as a priority therefore more money is being invested for improvement in the tourism sector as well as in infrastructure. India is able to reach out to a wide range of tourists due to its heritage, natural attractions and various forms of tourism. All these strong points can be seen as competitive advantages which creates a positive image for India. However, the kind of weaknesses India has as a country, such as underdeveloped infrastructure in remote areas, hygiene and especially safety and security, do hold a strong value for the traveler because these are some major aspects a travel destination can be judged upon by travelers.

6. External analysis

In continuation of the internal analyses (chapter 5), this chapter will follow on the external analysis and will discuss the opportunities and threats India can face.

6.1 Opportunities

Besides the strengths and weaknesses, India has also some opportunities that can work in favor for the country's tourism sector:

1. *Emerging economies in the Asia Pacific region*
2. *Expansion of luxury travel market*

This should attract travelers who tend to spend more on their holiday.

3. *More tourists traffic due to less visa restrictions*

The Government of India has introduced a new visa policy named E-visa for 113 countries. This particular visa is meant for international travelers who visit India only for purposes such as sightseeing, casual meetings of friends/family, casual business and short duration of medical treatment. It is an easy and quick online visa application and can be applied twice a year.

4. *Increase of interest in spirituality, health and wellness (yoga)*

Nowadays, people are getting more interested in taking good care of themselves by exercising, proper nutrition and mental peace. Health and wellness are taken more serious. Yoga, an ancient sport from India, is one spiritual sport that is being practiced by more people than a few years ago. This way people are getting more familiar with not only yoga, but also with India.

6.2 Threats

The threats that can have a negative effect on India as a travel destination are as follow:

1. *Negative safety perception in terms of terrorist attacks from neighboring country(ies)*

The relationship with neighboring country Pakistan creates instability in terms of safety and security.

2. *High competitive travel and tourism industry*

There are more countries in the Asia Pacific region that presumably perform better and have a stronger position in the T&T industry.

3. *Crimes against women*

News about crimes, rapes, sexual assault, robbing against international tourist, especially female tourists, can have a negative effect on the inbound tourism.

4. *Extreme weather*

Flooding, due to the monsoon season, can keep international tourists away to visit India in certain seasons.

6.3 DESTEP

A DESTEP model is often used to get a clear picture of relevant demographic, economic, social, technological, ecological and political issues of a country/area where companies intend to start a new business. The DESTEP analysis provides information of the macro-economic factors that can possibly effect the decision making of the tourist, in this case the Millennial traveler.

Demographic aspects

Netherlands, although a small country, has relatively a big population. Schiphol Airport is one of the main airports with connections to all major countries including India. Recently, Jet Airways has announced Schiphol Amsterdam as its new European getaway from March 27, 2016 which provide directs flights to main cities such as Delhi and Mumbai. Also, there are about 4.4 million Dutch Millennials which makes them a big potential group for the tourism sector in the Netherlands.

Economic aspects

The Netherlands belongs to the top economic countries. Although at present a higher unemployment rate, Millennials are still able to find jobs and are relatively well paid compared to other countries which means they have more to spend.

Socio-cultural aspects

People from the Netherlands have a history of traveling and exploring the world. The fact that Millennials like to see not the standard holiday destinations also applies for sure for the Dutch generation Y.

Technological aspects

The Netherlands is one of the countries with the highest internet penetration. People are used to work with computers and social media is integrated in the way of life. Wireless network, Wi-Fi, is available almost anywhere, so a holiday destination is definitely judged by the internet infrastructure.

Ecological aspects

Living in a high populated country has made people in the Netherlands aware that environment is important. People are more and more interested in sustainability and living outside the hectic cities. The way of life in India should offer areas that fulfill this interest.

Political aspects

The Netherlands is a democracy. Being a European Union member, it shows that the country embraces contacts with other countries which mean there are no barriers for its inhabitants to travel. Stable politics assures that at least for the next decennium the Netherlands will remain one of the wealthiest countries. The Dutch people, compared to other countries, have a high number of holidays.

6.4 Industry – tourism analysis

Tourism is social phenomenon which has majorly increased throughout the years; be it for business interest, educational or leisure travel; the human thirst for exploring new regions and countries have grown. Reasons for this are the low communication barriers due to advances technologies. Tourist expenditures induce more employment and keep the economy going because it generates an ongoing effect. (Kulkarni, 2015). The tourism and travel not only contributes to the economy but also to the nation, be it directly and indirectly. Direct contribution is about generation in of employment in various activities involved in the tourism sector like entertainment, accommodation and transportation. The investments being made to develop the destinations to attract the tourist and to increase his stay in the destination are called indirect contribution (Babu, 2014).

6.5 Competitor analysis

The travel and tourism industry is a fiercely competitive industry. The Asia Pacific region, includes South Asia and East Asia, is very heterogeneous. Table 1 (below) shows a competitive index ranking with some of India's major competitors in the Asia Pacific region. The countries have been ranked on eight aspects on a scale of 1 to 7. All the results are from The Travel & Tourism Competitiveness Index Ranking 2015.

Table 1. Competitiveness Index Ranking

Countries	Aspects								
	Business environment	Safety and Security	Health and hygiene	ICT readiness	Prioritization of T&T industry	Price competitiveness	Ground and port infrastructure	Tourist infrastructure	Cultural resources
China	4.25	5.47	5.29	4.15	4.73	5.10	3.91	3.04	6.44
India	4.02	3.82	4.32	2.83	4.14	5.59	4.02	2.90	5.09
Indonesia	4.48	5.16	4.24	3.73	5.61	6.11	3.27	3.07	3.12
Japan	5.12	6.05	6.43	6.00	5.44	3.75	5.29	4.11	5.92
Malaysia	5.60	5.79	5.18	4.52	4.71	5.76	4.50	4.43	2.95
Singapore	6.13	6.40	5.44	5.98	5.95	3.82	6.44	5.17	3.30
Thailand	4.78	3.75	4.87	4.34	4.95	5.06	4.50	4.43	2.95

All performances are compared to the best/worst performers on each pillar, globally.

Color codes

Dark green = very strong

Dark red = very weak

Yellow = average

All other colors = in between

Table 1 (above) shows seven countries being ranked on eight different aspects; business environment, safety and security, health and hygiene, ICT readiness, price competitiveness, ground and port infrastructure, tourist infrastructure and cultural resources.

➤ *Business environment*

Emerging economies like Japan, Malaysia, Singapore and even Thailand score far better than India.

➤ *Safety and security*

One of India's weaknesses (chapter 5.2) is safety and security and the score in the table confirms it with a below average score of 3.82. Thailand scores low as well while all other countries have a higher score.

➤ *Health and hygiene*

Indonesia and India are the only two countries which average scores of 4.24 and 4.32 respectively. The only consolation is that India comes not last in this category.

➤ *ICT readiness*

India scores dangerously low even though the IT sector is an emerging sector in India. China and Indonesia score fairly whereas all other competitors score (very) well.

➤ *Prioritization of T&T industry*

With a mere average score of 4.14, India is the only country in the Asia Pacific region where the T&T industry is not high prioritized. This could be the main reason why India scores poorly on most of the aspects; a major disadvantage.

➤ *Price competitiveness*

One of the very few aspects where India gets a score of 5.89 is the price competitiveness, which is very good. It leaves competitors like Japan and Singapore behind, for a change.

➤ *Ground and port infrastructure*

Poor infrastructure was already mentioned as one of India's weaknesses in chapter 5.2, however according to the table it scores decently with a 4.02 which is higher than Indonesia, Thailand and even China who performs even worse than India. Even Malaysia who has been doing well on other aspects scores average on infrastructure.

➤ *Tourist infrastructure*

India performs very badly on this aspect with the lowest score of 2.90. This does not come as a surprise since India scored not so high on 'prioritization of T&T industry' either.

➤ *Cultural resources*

India scores very good on this aspect due to its rich heritage and (historic) culture. Besides, Japan and China all other countries score below average.

6.5 Sub conclusion

The previous chapter illustrated the internal analysis; this chapter discussed the external analysis in detail. The strong location of India in the Asia Pacific region works as a strength for the nation. In addition to that, the emerging economies in the Asia Pacific regions work in favor of India too. Furthermore, tourist traffic should increase with the introduction and implementation of the new visa policy. The fast-growing interest for yoga can also be seen as another opportunity since the spiritual sport originates from India.

Besides these opportunities, India faces some threats too. Table 1 in chapter 6.3 showed India's low score on safety and security. This is in line with the negative safety perception the outside world has of India, especially in terms of terrorism attacks due to enmity between India and neighbor country Pakistan. Also the news of crimes against women are known worldwide, which only adds to that negative perception this time especially to female travelers. The climate in India is dominated by the monsoon wind which influences the weather a lot. The heavy rains in the monsoon season can cause floods which can keep the international tourists away. India might be located in the Asia Pacific region strongly, however that does not mean it has no competition from other regional countries. The T&T industry is a highly competitive sector especially in the Asia Pacific which is why India faces strong competition from countries like China, Singapore, Malaysia and Thailand. The competitiveness table showed the strong positions of these competitors in the T&T industry. India is behind in a lot of aspects especially in 'safety and security' and 'ICT readiness'. It scores well in only two aspects which are 'price competitiveness' and 'cultural resources' – the only two positives for India as of now.

7. Outcome research

For the primary data of this report, several interviews and a survey were conducted. This chapter will give a brief overview of the main findings. More detailed results can be found in the list of appendices.

7.1 Interviews

Interview 1 - Angel Annie Koshi, a travel consultant inbound tourism in India.

She works for a B2B company that deals with inbound tourism India. Also, the company promotes India through local agents and looks after all tourism related stuff.

The tourism sector is an important sector for India since it creates more job opportunities for the locals in India. As she stated, the Far East countries are being seen as tough competitors for India. Surprisingly, Turkey is another competitor at present. India had welcomed 7.64 million tourists in 2014 with 20% being foreign tourists from Europe. Only 52 thousand of them were from the Netherlands which is on the low side. The international tourists are not specifically from one age group; India has many forms of tourism to offer such as medical tourism, wildlife, and historic culture tours, therefore it attracts people from all over the world as well as from different age groups. The company she works for does promote India as a travel destination in other foreign countries to increase product awareness, however, marketing is not targeted at one target group. They make use of marketing tools such as trade shows and locally based agents. The Ministry of Tourism, in collaboration with travel agents, uses advertising in promoting India as a travel destination which is being done through various channels like internet, travel magazines and more. Besides on a national level, each state is also involved in promoting tourism by collaborating with leading tour operators. Furthermore, travel fairs like OTM and SATTE (South Asia's leading travel trade show) gives people and travel operators a chance to connect with others on a larger scale.

Interview 2 - Hardeep Singh a travel consultant from the travel agency Aman Reizen in Rotterdam, the Netherlands.

Aman Reizen is a well-established travel agency in the Dutch tourism market for over 15 years. They are specialized in tours to India and their IATA accreditation allows them to book flight tickets at special rates. As a specialized travel agency for India they offer tours, hotels, transfers and complete travel arrangements for tourists as well as for business travelers who wish to travel to South Asian country. Many of the places in India have been visited by the personnel of Aman Reizen, therefore they are able to advise the customer on basis of their own travel experiences.

Their expertise consists of various interesting sights, unique places, local customs, paradisiacal beaches, private transportation and excursions. In short, Aman Reizen will give you a dream trip.

Travel to India has definitely increased in the past recent years, especially among the younger generation who want to visit India to get more connected to the homeland of their ancestors. Most of those youngsters are born and brought up here which is why they want to discover other countries in the world too, as they get older. Over the years, non-Indian people have been more interested in traveling to India, mostly among the age group of 40 years and older so not specifically non-Indian youngster who belong to the Millennials. The most traveled destinations are Delhi and Mumbai, but South India is also gaining more popularity. Goa is known for offering beach holidays, whereas Thrivendrum and Bangalore offer spiritual adventures and experiences. Aman Reizen promotes India as a travel destination by sponsoring, marketing and promoting mostly within the Indian communities. India is a spiritual country with and endless of variety to offer the tourists; endless shopping in Delhi, the city of Bollywood in Mumbai, relaxation in Kerala or the paradise on earth in Jammu Kashmir. Apart from package trips and religious trips, Aman Reizen also offers customized trips according to the wishes of the customer in order to give a memorable holiday.

Interview 3 – Mr. P. Pereira, the Tourist Information Officer India from the India Tourism Office in Amsterdam, the Netherlands.

The Tourism Offices are an initiative by the Government of India and the one in Amsterdam is responsible for the Benelux and the Scandinavian countries. The main objective is to promote India as a travel destination in these European countries – this falls under the umbrella campaign ‘Incredible India’.

The tourism industry in India has seen a rise in number ever since the start of the campaign in 2002 – the campaign is being a success. The marketing strategy of the campaign ‘Incredible India’ consist of advertising, print ads, outdoor, direct marketing, travel magazines and much more. The target groups in the Netherlands include people from Suriname and the Dutch seniors since they have the time and money for traveling. They have been targeting the youth only by promoting adventure tourism in India but no specific marketing tool is being used for this. Surprisingly, no form of social media is being used as a marketing tool. Another surprising fact is that no other South (East) Asian country is being seen as (tough) competition.

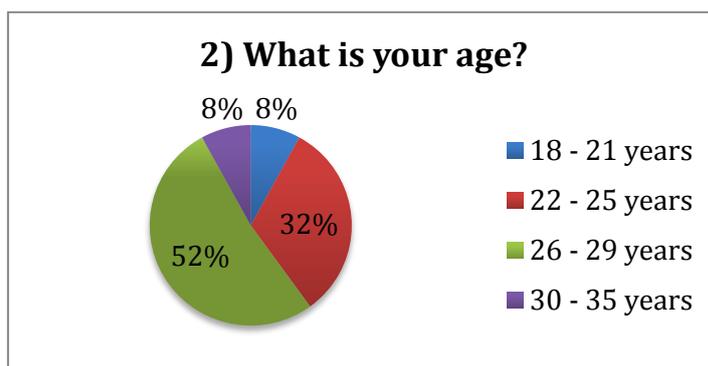
According to P. Pereira, India has a wide range to offer in terms of heritage; beaches, wildlife, forests, desert, hills/mountains therefore it does not compete with any other but its own and wants to offer the best.

7.2 Questionnaire

For this report, a questionnaire was made consisting of 16 questions in total. The survey was conducted among people from my own personal network and not to a particular college or university, due to time limitations. It was only sent out to people who belong to the age group of the Millennials; through the social media platform Facebook with a personalized message requesting them to complete the survey and also to forward it to others. The survey got completed by 100 respondents within a time span of two and a half weeks. The outcomes are by no means influenced. This sub chapter will highlight a few interesting outcomes, the rest can be found in the list of appendices.

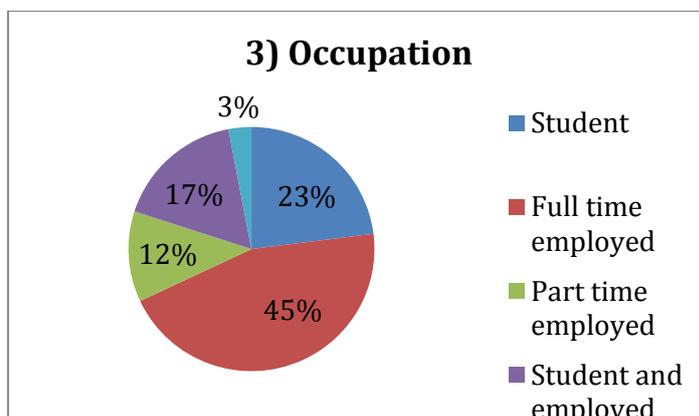
Question 2

Most of the respondents belong to the age group of 26 – 29 years.



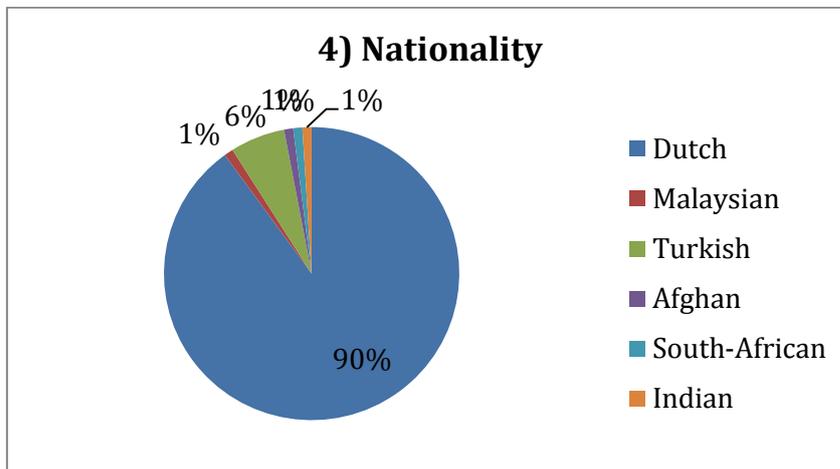
Question 3

Many of the respondents are full time employed, whereas only 3% is still a student. This is understandable since the age of the majority is between 26 -29 years old (outcome of question 2), which is mostly an age group who have already graduated and probably employed as well.



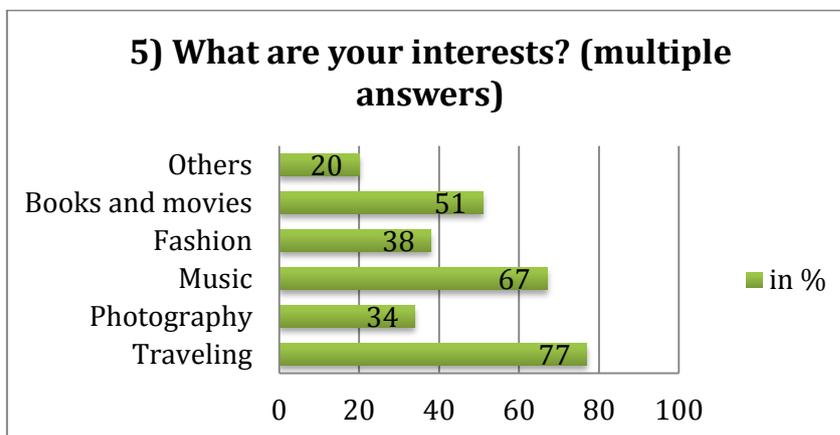
Question 4

Despite having a wide range of nationalities within my personal network, the majority turns out to be Dutch. This can be reasoned by the fact that most of them hold Dutch passports hence are being seen as 'Dutch'.



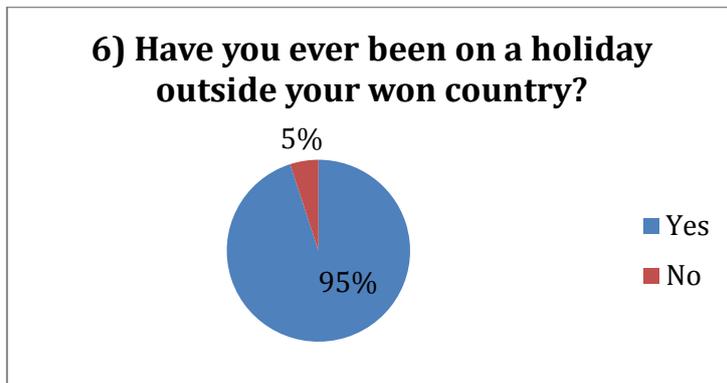
Question 5

Traveling stands out with the highest score of 77% which is line with earlier research on Millennials and their liking for travel.



Question 6

The previous outcome (question 5) showed that many of the respondents are interested in traveling, so it comes as no surprise that almost all of them have been on a holiday outside their country. Some reasons for the remaining 5% could be because of money, time and/or opportunity issues.

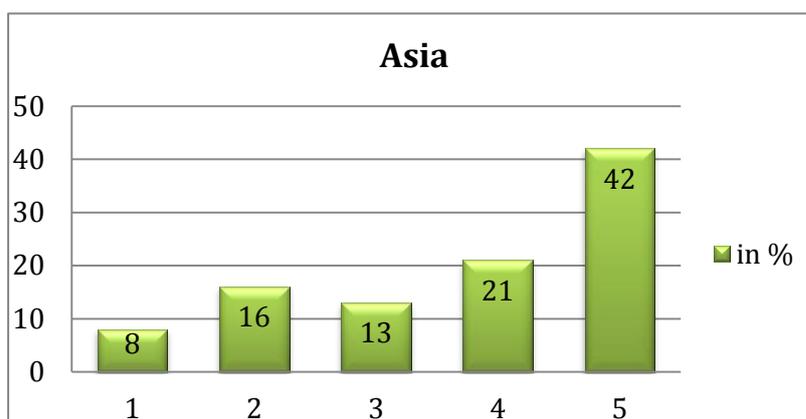


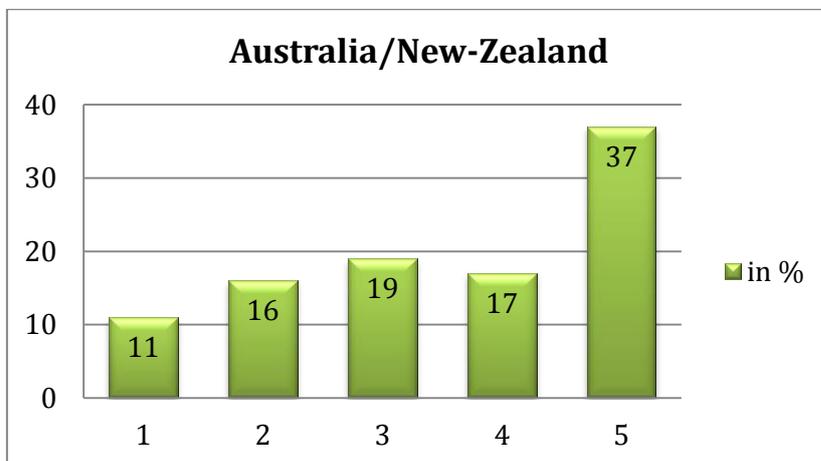
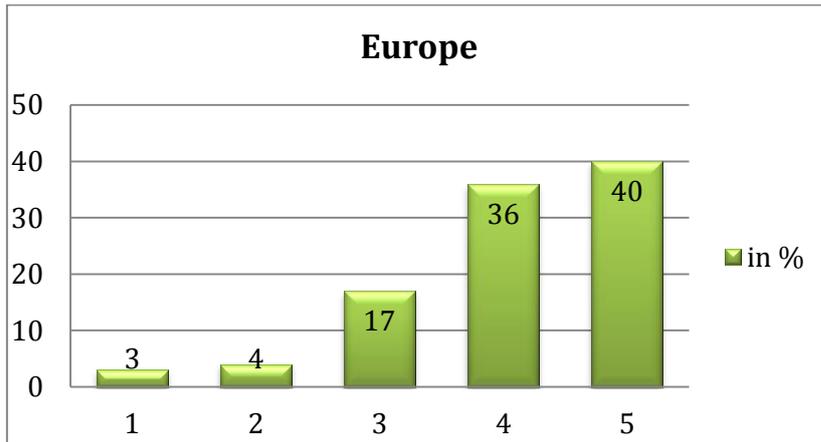
Question 7

Using a scale of 1=not at all interested to 5=very interested, please rate the following on preferences for a holiday destination in a continent.

Continents: Europe – North America – South America – Asia – Africa – Australia/New-Zealand

Asia is the most preferred continent with a 42% score on the highest scale of 5 (very interested), followed by Europe with 40% and Australia/New-Zealand with 37%.



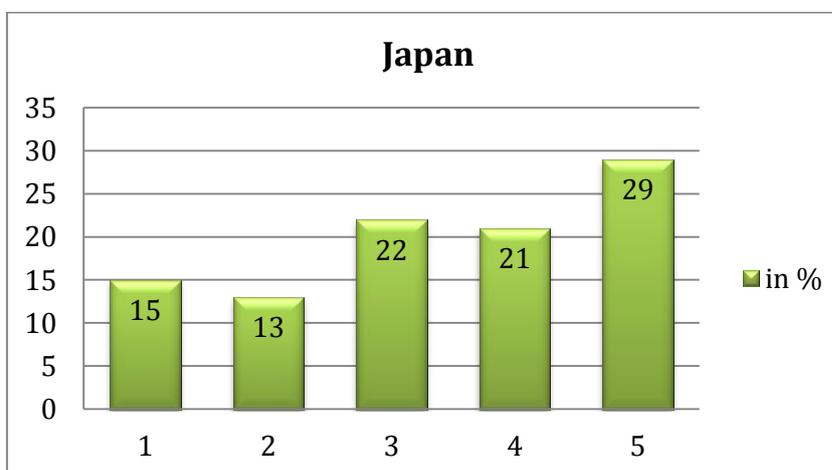
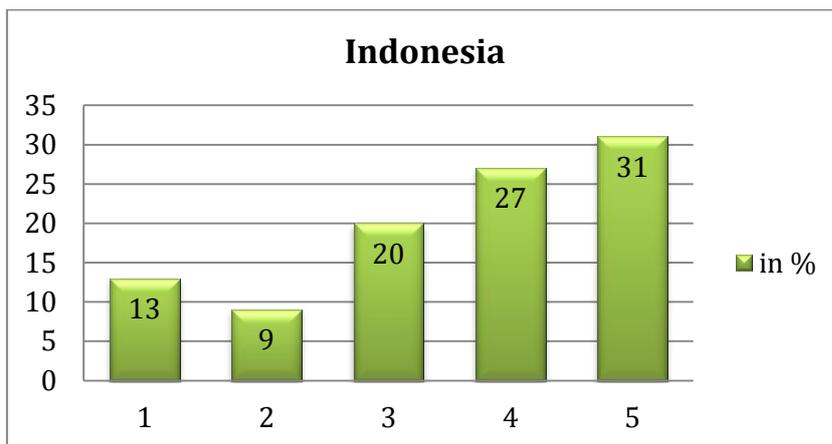


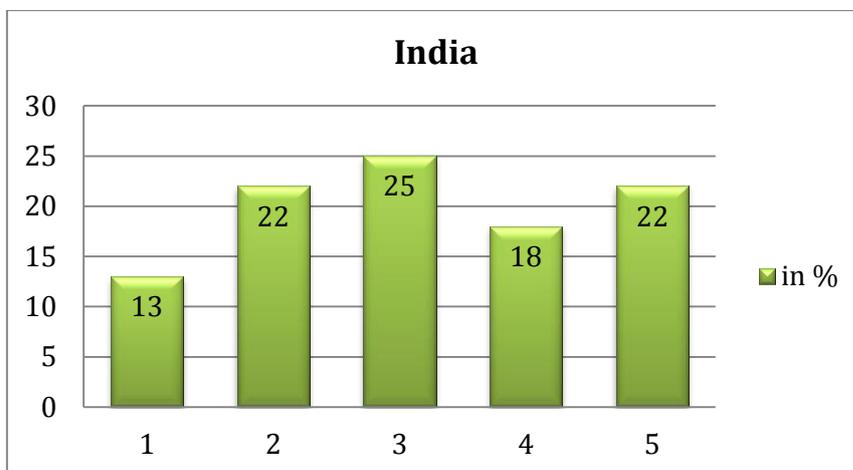
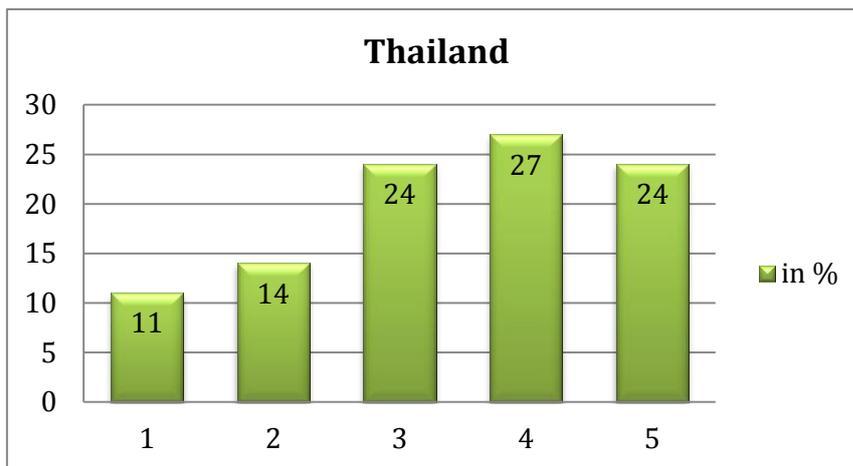
Question 8

Using a scale of 1=not at all interested to 5=very interested, please rate the following countries on preferences for a holiday destination to an Asian country.

India – China – Thailand – Indonesia – Singapore – Malaysia - Japan

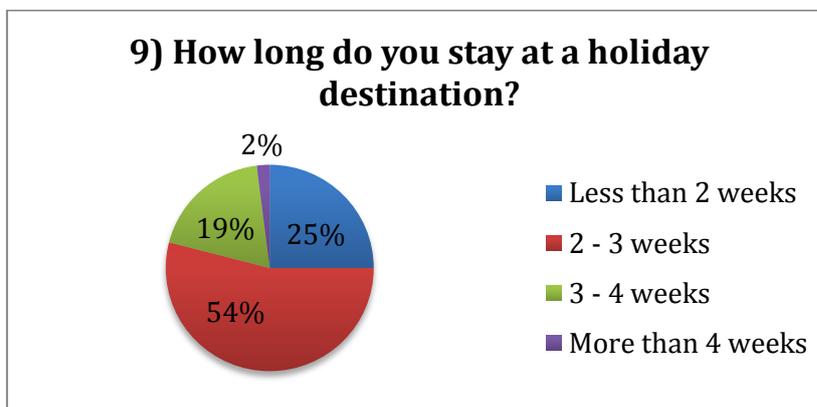
Indonesia scored the highest on an importance level of 5 with 31%, followed by Japan with 29% and Thailand with 24%. All these countries are India's competitors. Respondents are interested in traveling to India; however the highest score for India is on the third scale with only 25%.





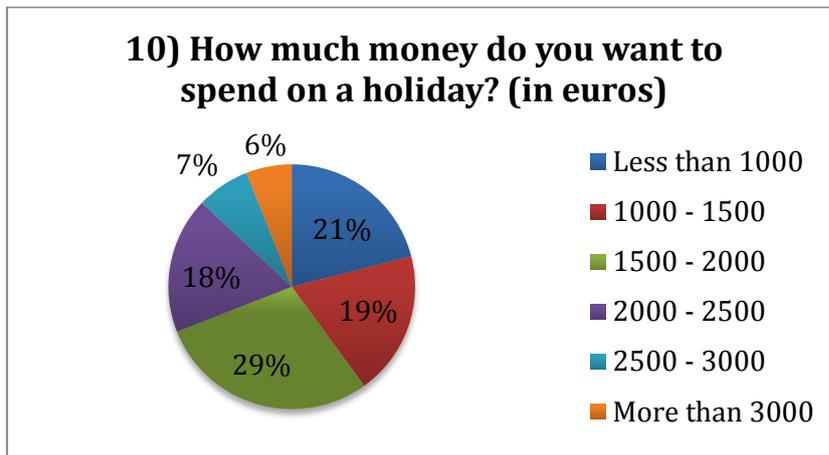
Question 9

Interestingly, the respondents of this survey prefer to stay for 2-3 weeks at the holiday destination, whereas chapter 2.4 of this report states that Millennials rather choose a longer vacation (average of 58 days) which enables to give them more experience instead of the typical two week vacations.



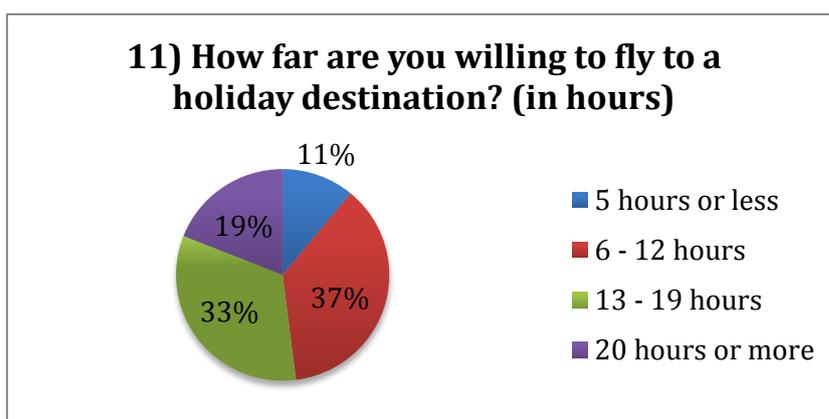
Question 10

Preliminary research showed that half of the Millennials tend to spend more than 1000 euros for a trip. The outcome of this question corresponds to those results. The budget these Millennials want to spend is between 1500 – 2000 euros. Yet, the second largest segment (21%) wants to spend less than 1000 euros.



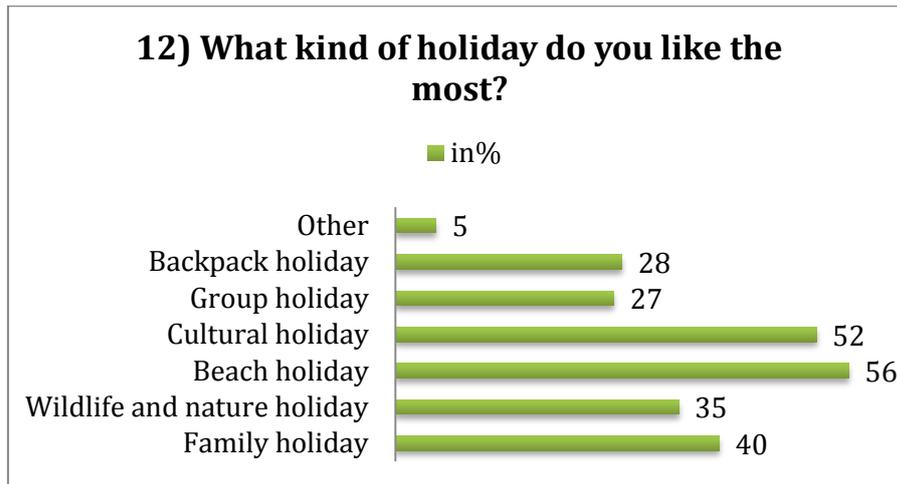
Question 11

Many respondents are interested in traveling to Asia, however the outcome of this question show that 37% of all respondents are willing to fly between 6 – 12 hours. That should be doable provided that flights to Asia are direct flights only. Also, these flights are often more expensive than flights with an intermediate stop. On the contrary, cheaper flights can take longer than 12 hours.

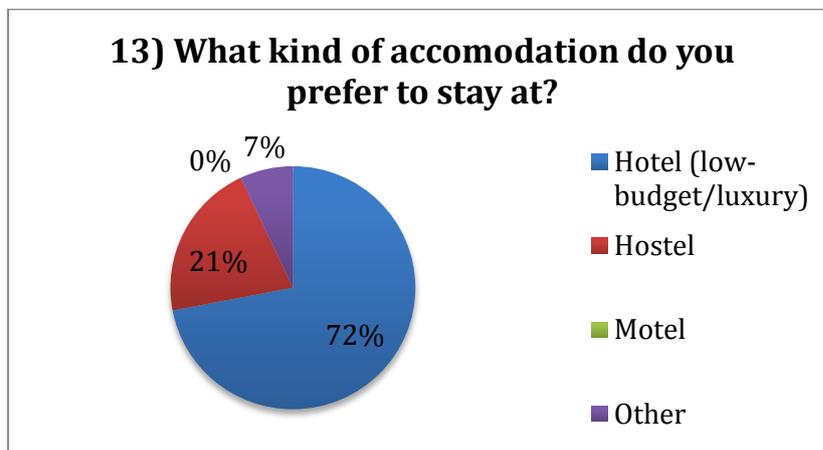


Question 12

Beach, cultural and family holidays are the most liked holidays by the respondents. This is not similar to the findings of previous survey done by WYSE Travel Confederation (chapter 2.5). According to their survey, young travelers are more likely to visit remote and rural areas rather than choosing the typical holidays such as beach holidays and visiting the larger cities. Though, wildlife/nature and backpacking are not disliked but the difference in percentages is quite remarkable.



Question 13

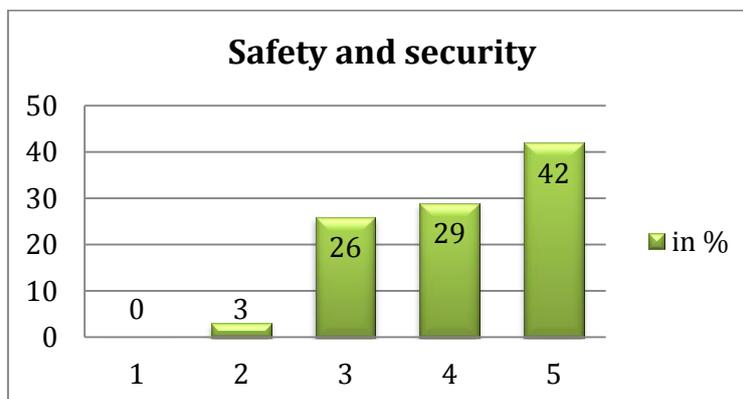


Question 14

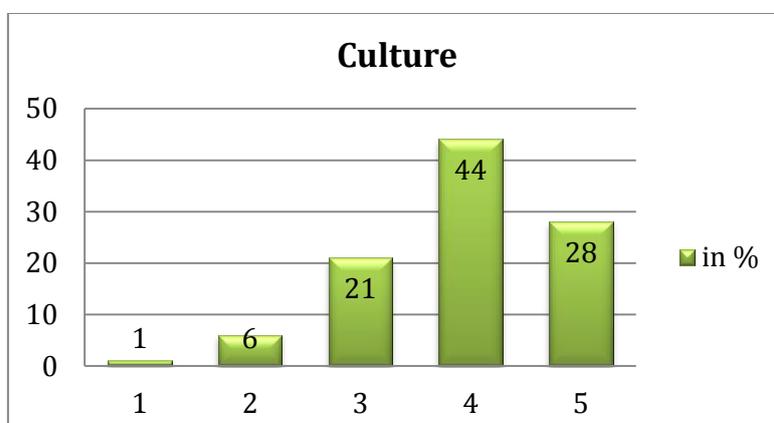
Using a scale of 1=not at all important to 5=very important, please rate the following criteria on importance for a holiday destination.

Criteria: Culture, Food, Infrastructure, Safety and security, Public Transport and Communication in English.

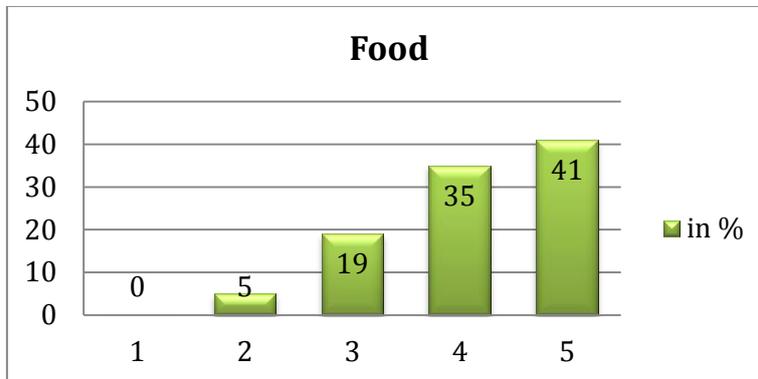
Out of the six criteria (mentioned above) *safety & security* and *food* scored the highest on the level of 5 (very important) along with *culture* (importance level 4). The first one can be seen from two sides; firstly, traveling to remote areas seems to become more popular among the Millennials even though the safety and security might not always be the best in those areas. Secondly, this survey had 57% female respondents. There is a possibility that female travelers are more concerned about their safety, especially in Asian countries for instance India.



Millennials want their trips to be an immersive experience. Culture is probably one of the most important and biggest aspects for international experiences. It might not be the most important aspect for the respondents in this survey but certainly they think it does play a relevant role for a holiday destination.

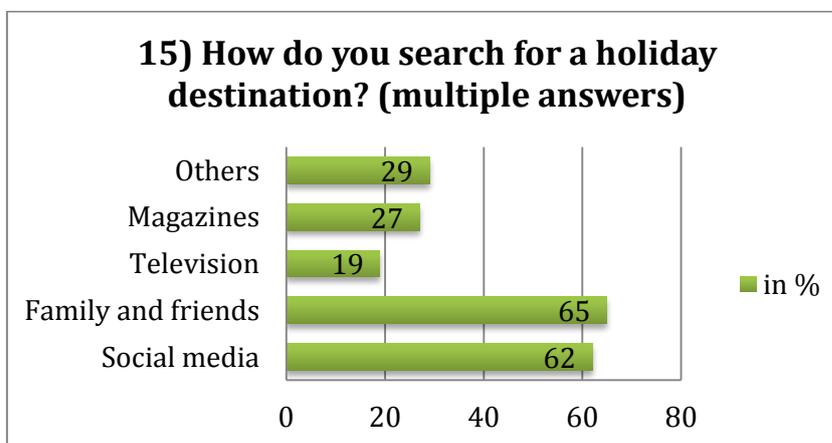


Lots of the respondents see food as a very important criterion which is not shocking since food is of great importance in a culture and the Indian cuisine has some delicious dishes with many herbs and spices.



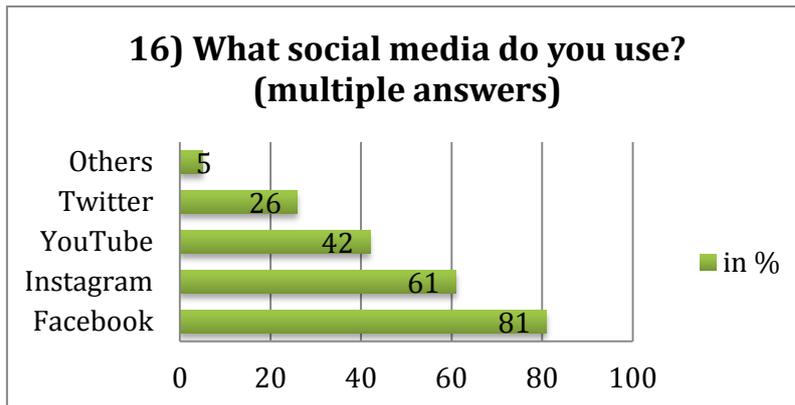
Question 15

Family & friends and social media are by far the most used sources to search for a holiday destination. Millennials are active on social media; therefore it was expected to be a 'search engine'. Possibilities of 'other' options are; the internet (travel websites) and travel blogs and even the traditional search engine such as travel agencies.



Question 16

As discussed, social media is a part of a Millennial's life and they are highly active on different social media platforms. Facebook is the winner, followed by Instagram which seems to be more popular than Twitter. Both platforms are an easy and quick way to share content and experiences on and to stay in touch with family and friends whilst traveling.



7.3 Sub conclusion

The tourism marketing for India is being done a large scale overseas. The Government of India has successfully managed to increase the numbers of international tourists throughout the years, by the implementation of the marketing campaign 'Incredible India' in its international tourism offices. Promotion is being done by advertising, direct marketing, sponsorships, travel fairs and trades, collaboration with travel agencies/operators and more. India attracts people from all over world of different age groups since the country offers tourism in many forms such as wellness, wildlife/nature, medical, historic/cultural tourism. Tourism marketing in the Netherlands is being done by the India Tourism Office Amsterdam by using different marketing tools which reaches out to the Dutch people, especially to the Surinamese, because of their history with India and the senior age group since they have the time and money. Marketing is not specifically done for the Millennials; the only way the youth travelers are targeted is by promotions of adventurous trips to India. Despite of no specific marketing strategy for the Millennials, the interest in traveling to India has increased among the young traveler over the years mainly because of cultural interest in the homeland of their ancestors.

The outcomes of the survey showed that some of the characteristics and preferences of the Dutch Millennials are quite similar to other researches on the Millennials earlier in this report. Though there are some differences in the kind of holidays they like and the length of the stay. A small segment of the respondents are interested in yoga which is a surprising fact since this is an ancient spiritual sports originated from India. The use of social media is as important for the Dutch Millennials as for any other Millennial.

8. Confrontation analysis

The internal and external analysis have been discussed in detail in chapter five and six, respectively. The following chapter will combine both and will create the SWOT matrix, thereafter both analyses will be put against each other in the confrontation analysis.

8.1 SWOT analysis

Strengths	Weaknesses
<ol style="list-style-type: none"> 1. Wide range of natural attractions 2. Investment in infrastructure 3. Strong location in the Asia Pacific region 4. Price competitiveness 5. Forms of tourism 6. English language 7. Increase of government expenditure in tourism industry 	<ol style="list-style-type: none"> 1. Underdeveloped infrastructure in remote areas 2. Safety & security 3. Corruption 4. Hygiene 5. Airlines 6. ICT unready
Opportunities	Threats
<ol style="list-style-type: none"> 1. Emerging economies in the Asia Pacific region 2. More tourist traffic due to less visa restrictions 3. Increase of interest in spirituality, health and wellness (yoga) 	<ol style="list-style-type: none"> 1. Negative safety perception in terms of terrorist attacks from neighboring country(ies) 2. High competitive travel and tourism industry 3. Crimes against women/female travelers 4. Extreme weather

8.2 Confrontation mix

The confrontation mix is a component whereby the internal analysis will be confronted with the external analysis in order to develop a good strategy. Table 2 (below) gives an overview of several combinations that can be beneficial.

Table 2. Confrontation matrix

		Opportunities			Threats			
		1. Emerging economy in the Asia Pacific region	2. More tourist traffic due to less visa restrictions	3. Increase of interest in spirituality, wellness and yoga	1. Negative safety perception in terms of terrorist attacks from neighboring country(ies)	2. High competitive travel and tourism industry	3. Crimes against women/female travelers	4. Extreme weather
Strengths	1. Wide range of natural attractions	1	1	2		1		1
	2. Investment in infrastructure	2	2			2		1
	3. Strong location in the Asia Pacific region	2	2	1				
	4. Price competitiveness	2	2			2		0
	5. Forms of tourism	2	2	2		1		1
	6. Knowledge of English language	2	2			2		0
	7. Increase of government expenditure in tourism industry	2	2	2	2	2	2	
Weaknesses	1. Underdeveloped infrastructure in remote areas		1	-2		-1	-1	-2
	2. Safety and security				-2	-2	-2	
	3. Corruption					-2		0
	4. Health and hygiene					-1		
	5. Airlines	-1			0	-2		
	6. ICT unready	-2			0	-1		

Note:

- Very positive effect = +2
- Positive effect = +1
- No effect = 0
- Negative effect = -1
- Very negative effect = -2

8.3 Recommendations – strategic options

On the basis of the confrontation matrix, the following strategic options can be made:

➤ *Increase of government expenditure in tourism industry*

Increase of government expenditure in the tourism industry will make it able to tackle almost all threats. Safety and security is a major issue in India according to the competitor analysis in chapter 6.3, table 1. This got also confirmed by the outcomes of the survey wherein the majority of the respondents find safety and security the most important criterion for a travel destination. This issue can be tackled by more law enforcement; the increase of police deployment will costs more money and awareness of more tourist safety needs financial sources too, however in order to portray a safe and secure feeling for the foreign tourist, this expenditure is very much needed. Moreover, the crimes against female travelers should decrease as well by making India a safer place for foreign tourists.

➤ *Investment in infrastructure*

A good infrastructure is crucial for economic growth as well as for the T&T industry. India scored exceptionally low on tourist infrastructure compared to its competitors in the Asia Pacific region. Also, poor infrastructure might give the foreign traveler a more unsafe feeling which again does not portray a safe image of India. Not to mention the ground and port infrastructure in India is just about average. In addition, remote and rural areas are also not easy accessible due to undeveloped infrastructure. Investment in all these aspects should be able to bring improvement because it is a necessity for generating more tourist traffic. Improvement of ground/port, air and tourist infrastructure should make India able to compete with the Asian competitors.

➤ *Wide range of natural attractions*

Foreign tourists have more to spend in countries with an emerging economy; India belongs to those economies. Due to the restricted visa policy, tourist traffic will increase which means more potential tourists for the natural attractions in India. The fast-growing popularity of yoga also work as an advantage for India since the country is well known for being close to nature.

➤ *Investment in ICT*

Shockingly, India seems to lack in technology even though earlier research had shown that the country is making progress in digital technology in terms of Wi-Fi hotspots and also the government plans to invest more money in the IT industry, especially in the rural areas to get better connectivity. This issue is not to be taken lightly, because internet and other digital technological facilities are becoming more important in today's life. Especially the Millennials who are frequently users of internet and social media and therefore want to stay connected even while traveling.

9. Marketing Mix

In this chapter the marketing mix will be used by applying the 5 Ps in order to target the youth traveler.

9.1 Product

The product for this marketing strategy is India as a travel destination. It is very important to highlight the positives of the country because that will attract the travelers so also the Millennials. The survey has shown that Millennials are interested in various types of holidays; beach, cultural and wildlife. However, backpacking is also loved by them according to other researches. As mentioned in chapter 2, India does offer a range of various forms of tourism which is an advantage. The Indian government could respond to these specific preferences by investing more money for the development of these forms of tourism in order to attract more Millennials to India.

9.2 Place

Place in this aspect is more than a physical distribution and also includes the use of social media. The digital technology can be beneficial for any kind of company/organization, providing that the social media channels are being used effectively. The survey for this report has shown that the Millennials use different types of 'search engines' for looking up travel destination. A large part of the respondents have said to be active on social media like Facebook, Twitter and the emerging Instagram. However, this does not mean that the target group makes their final decision based on these channels but these social platforms definitely work as a trigger to gain the attention of the Millennials and develop interest for travel and also for a particular form of travel.

9.3. Price

The range of the age group of the Millennials starts at 18 to 35. An 18 year old does not necessarily have to be a student nor is a 35 a fulltime employee. Though, a full time employee does have the ability to spend more money on a holiday than someone who is either a student or part time employed. In addition, Millennials tend to spend more on a holiday than other travelers. In order to be able to target the different segments within the target group, it is better to offer various holiday trips within different price ranges. This way it does not only focus on the 'rich traveler' but also targets other segments within the target group.

9.4 Promotion

The Millennials is a generation who is constantly in touch with social media and its various platforms which was confirmed by the outcome of the survey; more than 70% of the users are active on social media. The survey also showed traveling is a field of interest for the majority and respondents are also interested in traveling to Asia. India scored fairly, however in order to increase the interest and grab the attention from these youth travelers, it might be useful to put India as a travel destination on social media such as Facebook and Instagram provided that the pages are being updated with content about travel tips, news, experiences from other travelers, to make things more interesting for the viewer and trigger them to travel to India.

9.5 People

The India Tourism Office is already promoting India quite aggressively; they attend travel fairs and trades but there is still not much involvement with the youth travelers. In order to engage more with the Millennials, The India Tourism Office can collaborate with student associations at colleges/ universities and take part into cultural activities where they can represent India as a travel destination. Also the spiritual sport yoga, which originates from India, has become more popular in the recent years. In fact, the survey has shown some of the respondents were interested in yoga as well. This can be seen as an opportunity to work hand in hand with yoga institutions for promotions. Travel blogs have rapidly grown in the current digital era; many people like to write about their travel experiences and put it online to share it with, not only family and friends, but also with the outside world. These websites (travel blogs) get their popularity from social media. According to the stats of the survey, family and friends are still the most reliable source to search for a travel destination. This means recommendations made by those people still have an impact therefore the traditional marketing tool of word to mouth is still of great importance for any kind of marketing; it can change the 'negative' perception of India as a travel destination, if travelers have experienced India positively.

10. Conclusion

Looking at tourism countries are compared by the tourism index on business environment, safety and security, health and hygiene, ICT readiness, prioritization of T&T industry, price competitiveness, ground and port infrastructure, tourist infrastructure and cultural resources. On the basis of table 1 in chapter 6.3, the following conclusions can be made:

India has the lowest score for tourist infrastructure. It scores averagely on aspects such as business environment, health and hygiene, prioritization of T&T industry and ground and port infrastructure. The only two aspects India scores well is for price competitiveness and cultural resources. This shows the country is very much behind in almost every aspect in comparison to its competitors. Though, according to the internal analysis in chapter 5, the Indian government does invest more money in the tourism sector and also for the improvement of infrastructure.

Interviews with experts of the tourism market, chapter 7.1, show that India is doing well in the T&T industry; numbers have increased since the marketing campaign 'Incredible India' which has been a success till now. However, India can improve its marketing strategy and promotions especially to reach out the Millennials since no specific marketing tool is being used to target the youth travelers.

Looking at the specific target group the Millennials, the survey (chapter 7.2), shows some similarities with previous information in chapter 2.4 Millennials and chapter 2.5 travel trends by Millennials. The majority of the respondents are the most interested in traveling. Social media is being used by many too and also as a search engine to search for travel destinations. The survey also resulted into a few new findings. For instance, beach, cultural and family holidays is still very much liked by the (Dutch) Millennials whereas previous research had shown backpacking is becoming trendier among the youth travelers. Competitors such as Japan and Indonesia are more preferred as travel destinations than India. Also safety and security is the most important criterion for a travel destination according to (Dutch) Millennials.

The confrontation mix in chapter 8.2 (table 1.2) resulted into a few strategic options to strengthen the position of India within the T&T industry in the Asia Pacific region. Issues as safety and security and increase of government expenditures in the tourism market should be beneficial for India.

11. Recommendations

After thorough research, desk and field research, and collecting all the data (primary and secondary) the following recommendations can be made for India with the aim to attract more foreign tourists, the Millennials to India:

First of all, India understands the importance of the T&T industry by investing more money in the tourism sector. However this is in contrast with the competitiveness index table in chapter 8.2 which shows an average score on prioritization of T&T industry in India. Nevertheless, the government needs to spend its expenditures effectively. Therefore it is advisable to start with improving the safety and security scene. Clearly, this is a major issue in India which has already created a rather unsafe image of India mainly for female travelers. In order to change and improve it, the Indian government needs to invest money in law enforcement; more police deployment is needed to make India a safer place for foreign tourists.

Secondly, infrastructure of any kind (ground and port, tourist and air) also demands improvement. Not to forget, the undeveloped infrastructure in the rural and remote areas also needs to be improvement. Especially since the Millennial traveler has set a new trend of traveling; visiting remote and rural areas instead of the bigger well-known cities. Proper infrastructure can make traveling from and to those less-known areas easier. Money should also be invested in air infrastructure. As researched, one of India's weaknesses is the airlines. Cities like Goa and Jaipur who are becoming more popular do not have international airports, that means foreign tourists have to take internal flights which is highly time consuming.

Thirdly, in the world of digital technology, social media marketing is becoming more and more important for reaching out to the younger generation, the Millennials. The marketing campaign 'Incredible India' has been a success and is still going strong. Though, social media marketing is still not practiced by the India Office Tourism in Amsterdam which was confirmed by The India Tourist Officer, Mr. P. Peirera. Therefore it is suggested to make use of social media tools, such as a Facebook page in order to reach out to the Millennial traveler. Besides this, more involvement with the youth traveler can be done by taking part in cultural activities and festival in colleges/universities. This way there will be direct connection with the target group.

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List of Appendices

Appendix 1 – Interview one

This interview was done with Angel Annie Koshi (inbound travel consultant India).

- 1) *How important is tourism for India?*
Tourism plays a vital role in revenue generation for India. Also this gives more job opportunities to locals in India.
- 2) *Which countries are being seen as competitors?*
Far East countries and Turkey at present.
- 3) *How many tourists visit India per annual?*
Millions of tourists. As recorded in in 2014- 7.64 million tourist visited India.
- 4) *How many of these tourists are from Europe?*
20% approx.
- 5) *How many of those are from The Netherlands?*
Approx. 52 thousand.
- 6) *What kind of people are they? (young, old, couple, singles, group)*
All age groups.
- 7) *Does your company have a marketing campaign to promote India as a holiday destination in foreign countries?*
Yes.
- 8) *If so, what exactly is the campaign about?*
Product awareness.
- 9) *If not, why? And what does it do to attract more tourists?*
N/A
- 10) *Is the campaign being targeted at any specific group?*
No general market. India being a vast country has lots to offer tourists of different age group, example: adventure tourism, medical tourism, historic culture tours, hills and wildlife etc. This brings in tourists of different age groups from all over the world.
- 11) *How do you reach the target group? Which marketing tools are being used and why?*
Trade shows, locally based agents, company appointed local sales agents, word of mouth, and media etc. Advertising is used as a tool wherein Indian tourism ministry and travel agents work hand in hand in promoting India as a destination.

A follow up was done after a few days with the following question:

- *You said that advertising is being used as a tool to promote India as a travel destination. Is social media being used as well? If yes, which channels? And can you give some examples please.*

Advertising is thru various channels as in television, Internet, travel magazines, hoardings etc. apart from India tourism each state is also involved in promoting them. They work hand in hand with leading tour operators and work out offers and awareness about a state. Apart from this there are various travel fairs example OTM, SATTE in India which gives a fair chance for people n travel operators to connect with one another on a larger scale.

Appendix 2 – Interview two

This interview was done with Hardeep Singh (travel consultant at travel agency Aman Reizen in Rotterdam, the Netherlands) by email.

Background information about Aman Reizen

Aman reizen is een reisbureau al ruim 15 jaar bekend op de nederlandse markt. Vanaf het moment dat wij zijn begonnen zijn wij gespecialiseerd in reizen naar india. Wij boeken als IATA agent onze eigen vliegtickets met speciale tarieven en zijn aangesloten op de SGR. Als india- specialist verzorgen wij ook tours, hotels, transfer en complete reisarrangementen, voor zowel toeristen als zakelijke reizigers die naar india wensen te reizen.

De meeste medewerkers van Aman Reizen hebben veel bestemmingen persoonlijk bezocht en kunnen u op basis van eigen reiservaringen adviseren. Onze expertise betreft niet alleen uitstekende en meestal kleinschalige accommodaties, maar ook interessante bezienswaardigheden, plaatselijke gewoontes, unieke plaatsen, paradijselijke stranden en uw persoonlijke vervoer en excursies. Wij stellen alles in het werk om uw reis tot een droomreis te maken.

Questions

- 1) *Hoeveel mensen reizen er per jaar naar India? En hoeveel hiervan zijn jongeren (leeftijd tussen 18-35) Mochten er niet veel jongeren reizen naar India, waarom denkt u dat die interesse er niet ligt bij hen?*

De exacte cijfers van mensen die reizen naar india kan ik helaas niet veel over zeggen, omdat wij maar een gedeelte van de reizigers hebben. De markt naar india is in jaren ontzettend gegroeid. Voornamelijk binnende indiaase cultuur, zijn het dat de jongeren meegaan met hun ouders om het thuisland te bezoeken. Veel van de jongeren zijn hier opgegroeid, krijgen denederlandse cultuur mee, dus hebben naar mate ze ouder worden ook interesse om andere landen te ontdekken.

- 2) *Naar welke provincies/steden zijn de reizigers het meest geïnteresseerd in?*

Meeste van onze klanten bezoeken delhi, punjab of mumbai. Maar ook het zuiden van india is heel erg in trek bij klanten. Voor strand bestemmingen is goa heel erg in trek en voor spirituele belevenissen naar Thrivendrum en Bangalore.

- 3) *Doen jullie ook aan promotie voor India binnen Nederland? Zo ja, op welke manier?*

Wij doen ook aan promotie via sponsoringen, marketing en promoten in de meeste gevallen binnen de indiaase gemeenschappen.

- 4) *Welke soort reizen bieden jullie aan? (groepsreizen, individuele reizen, culturele, backpack etc)*

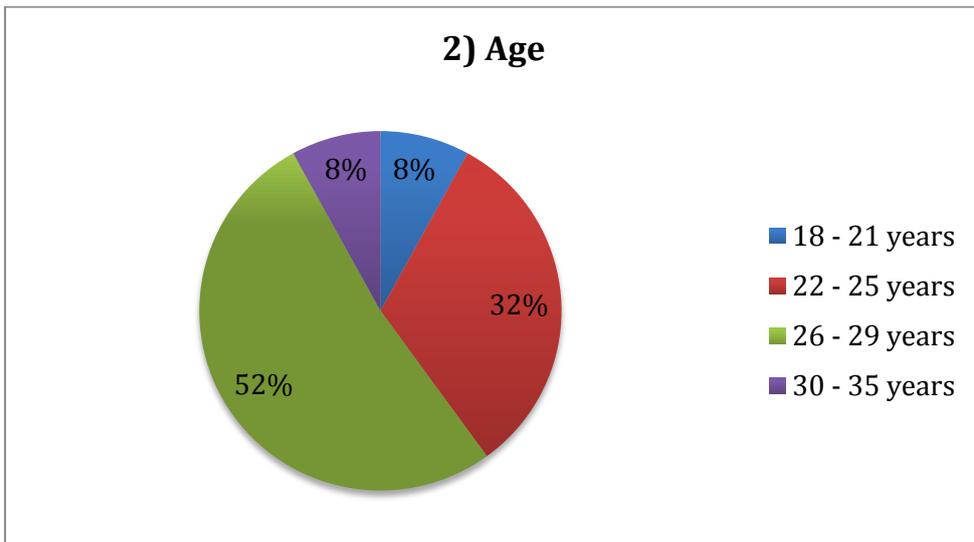
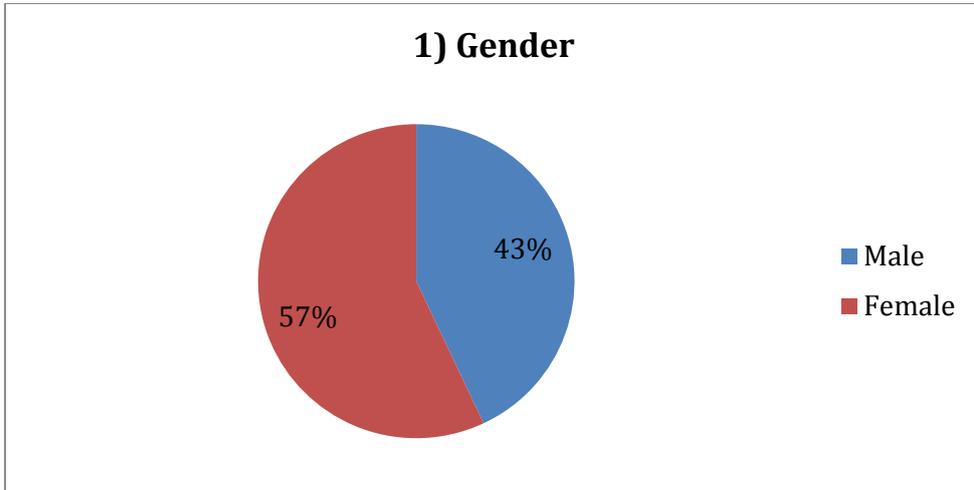
Wij bieden voornamelijk individuele (pakket)reizen aan, maar ook religieuze reizen. Al onze reizen zijn op maat gemaakt en geheel naar wens van de klant.

- 5) *Is de belangstelling bij het Nederlandse volk naar India gestegen in de afgelopen jaren? Zo ja, waarom?*

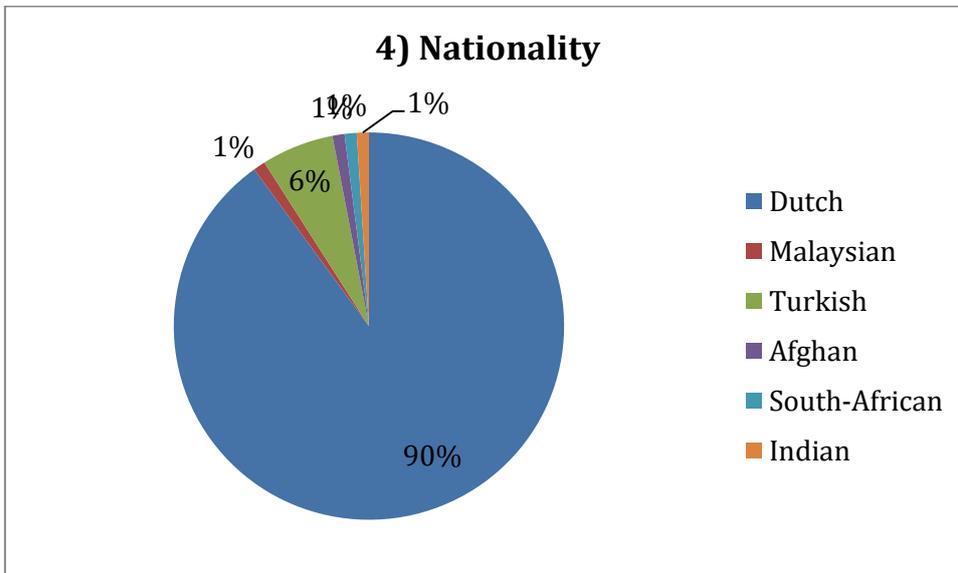
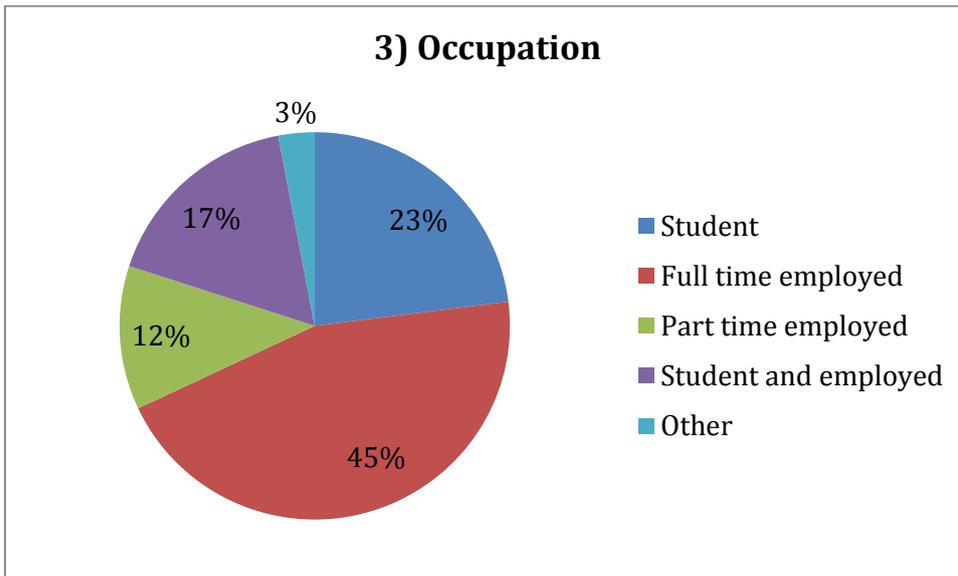
Het is moeilijk om te peilen in welke maten de belangstelling is gestegen naar India. Op basis van onze kantoor gegevens is de belangstelling voor non-indiaase mensen wel wat gestegen, vooral bij de wat oudere reiziger (40+). India is een ontzettend spirituele land, met ongekende mogelijkheden en variatie. Of je nou wilt shoppen in delhi, Bollywood wilt bekijken in Mumbai, je innerlijke rusten vinden in Kerela of natuur in Jammu kashimir wilt ontdekken. Het is een land wat heeft voor iedereense wil.

Appendix 3 – Survey results

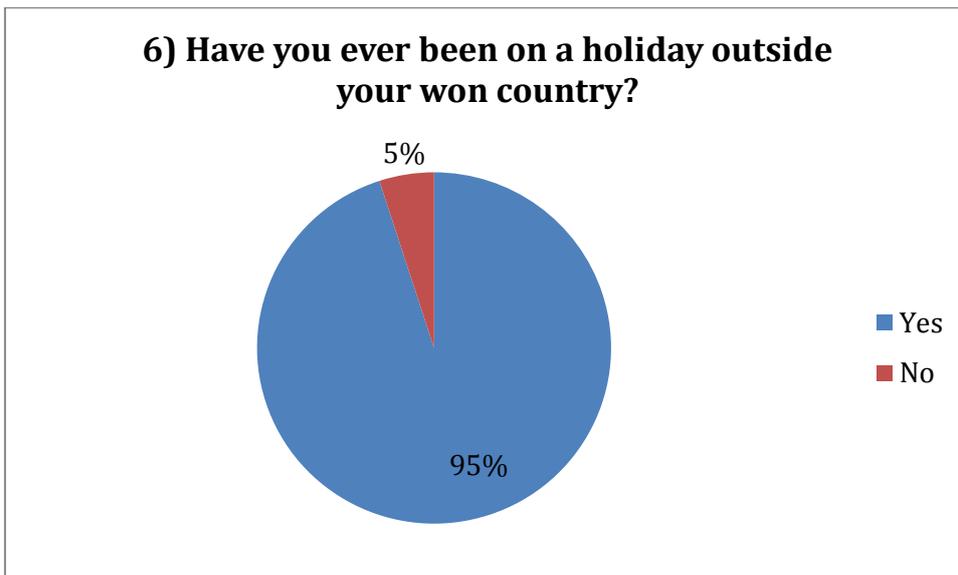
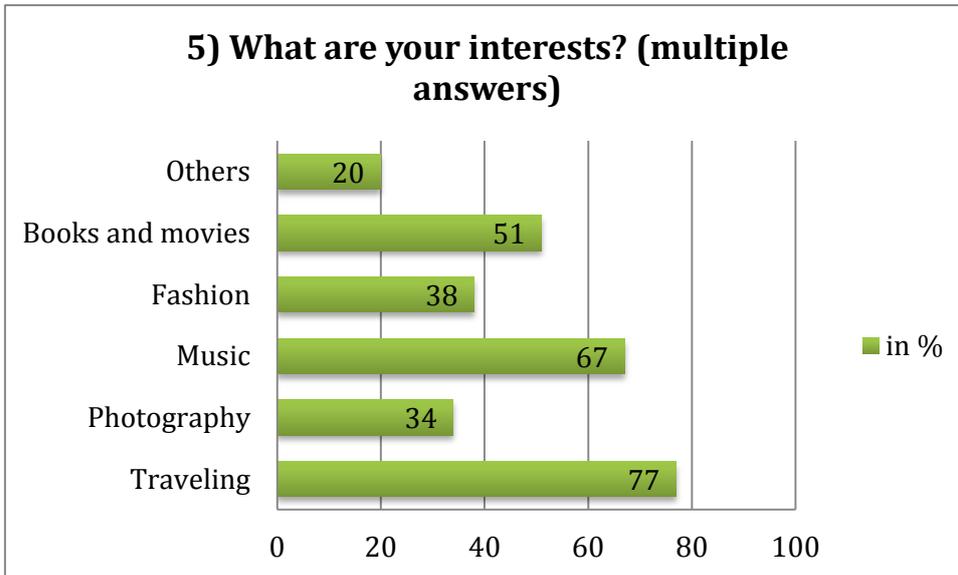
Appendix 3.1 Questions 1 and 2



Appendix 3.2 Questions 3 and 4

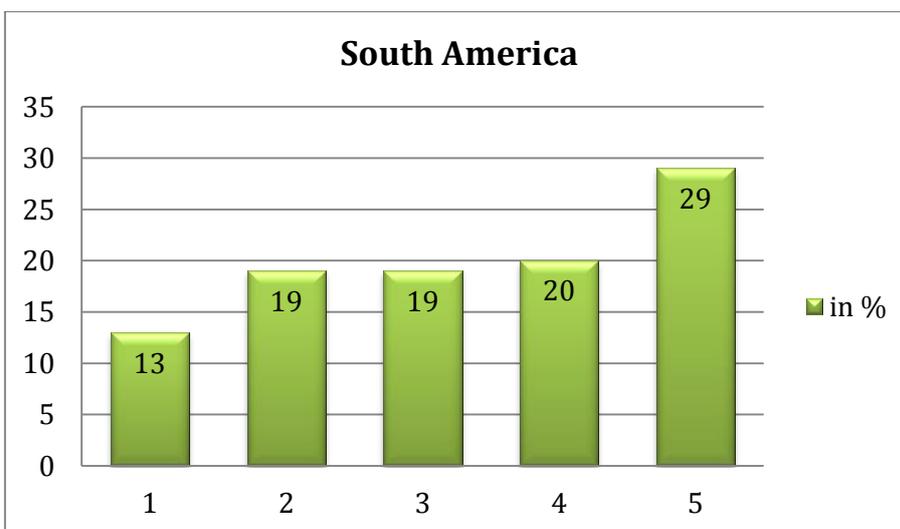
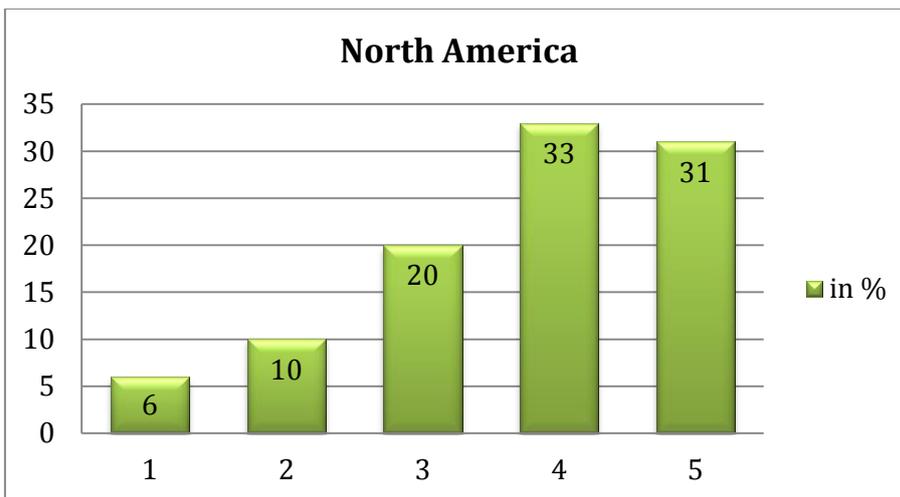
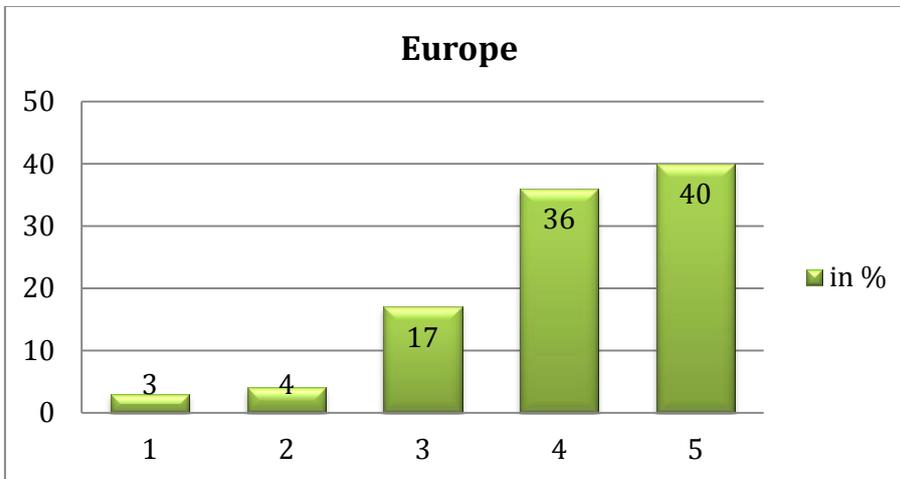


Appendix 3.3 Questions 5 and 6

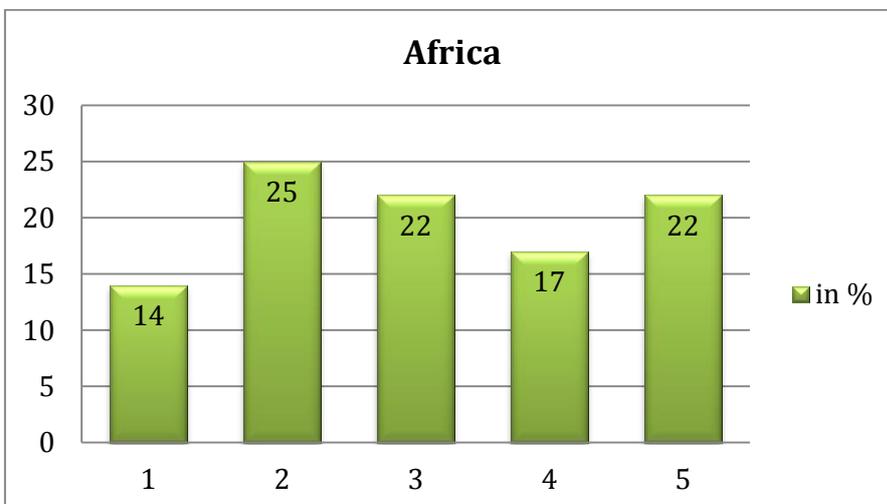
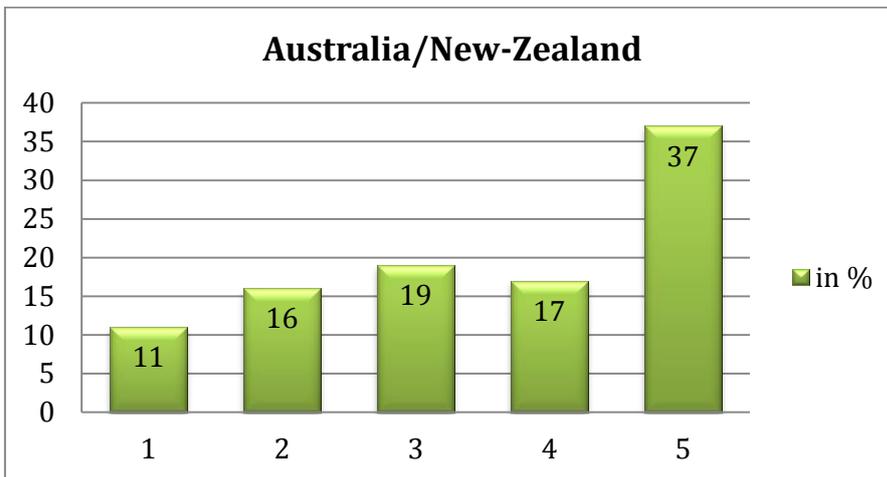
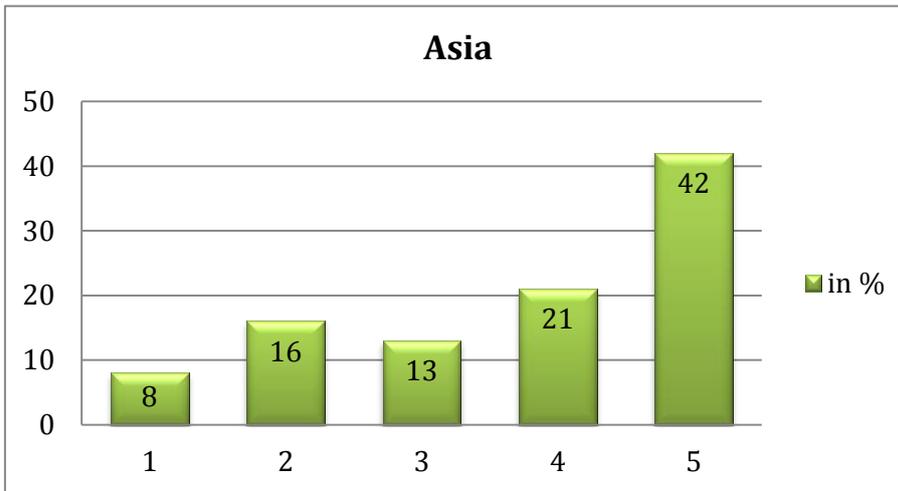


Appendix 3.4 Question 7 - part 1

Using a scale of 1=not at all interested to 5=very interested, please rate the following on preferences for a holiday destination in a continent.

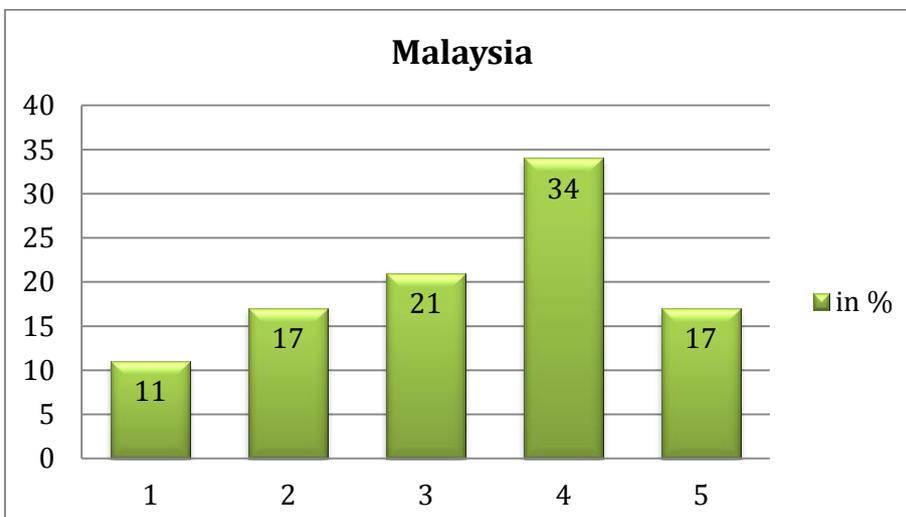
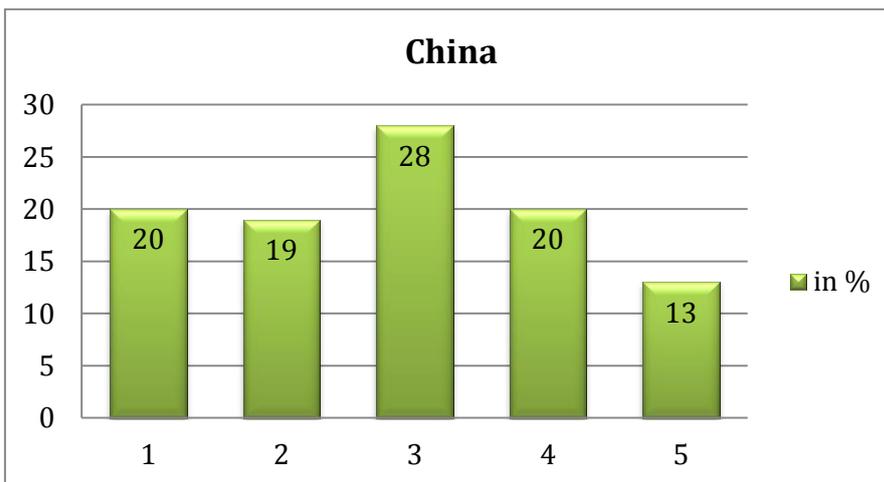
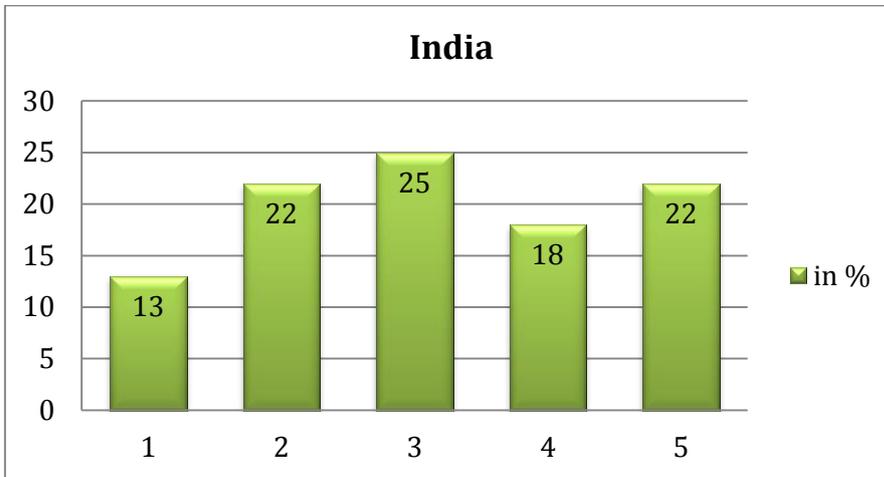


Appendix 3.5 Question 7 – part 2

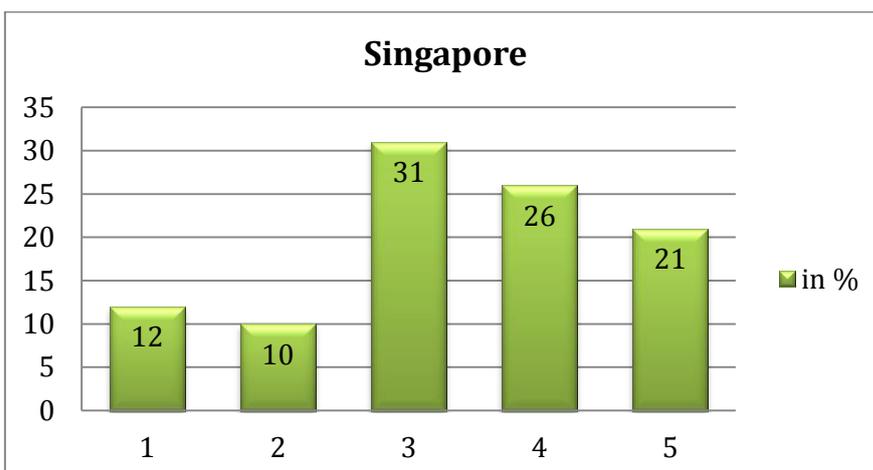
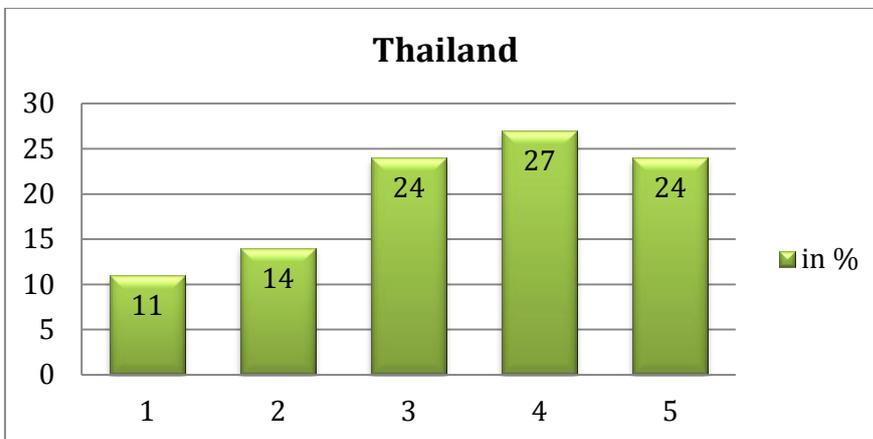
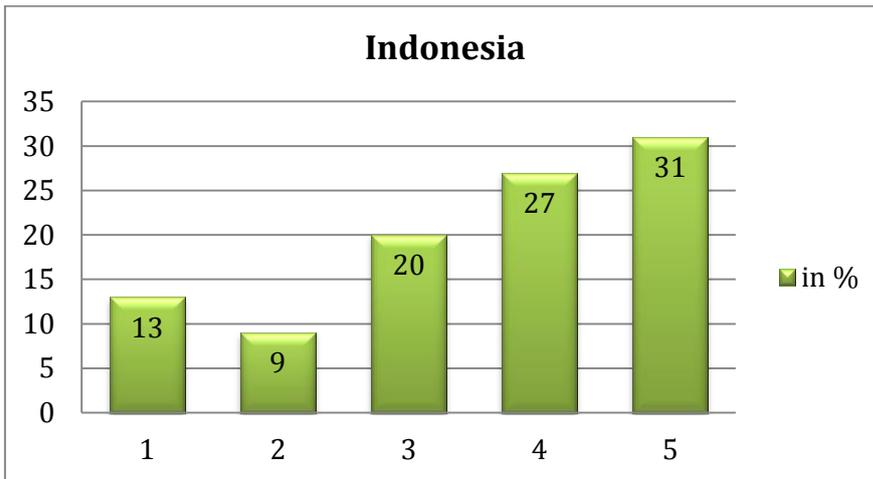


Appendix 3.6 Question 8 – part 1

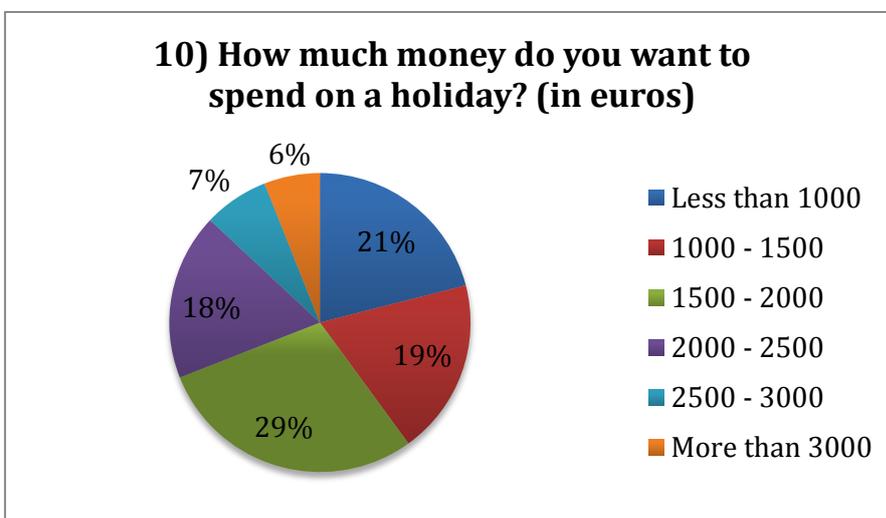
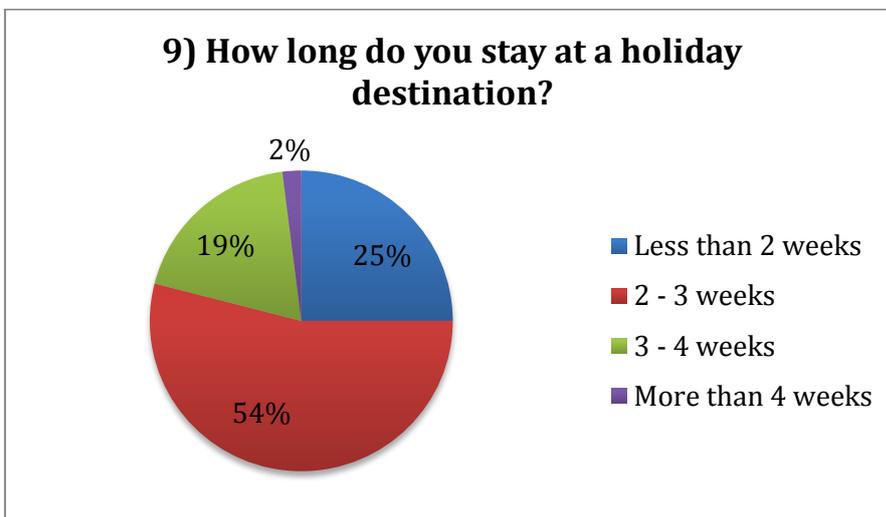
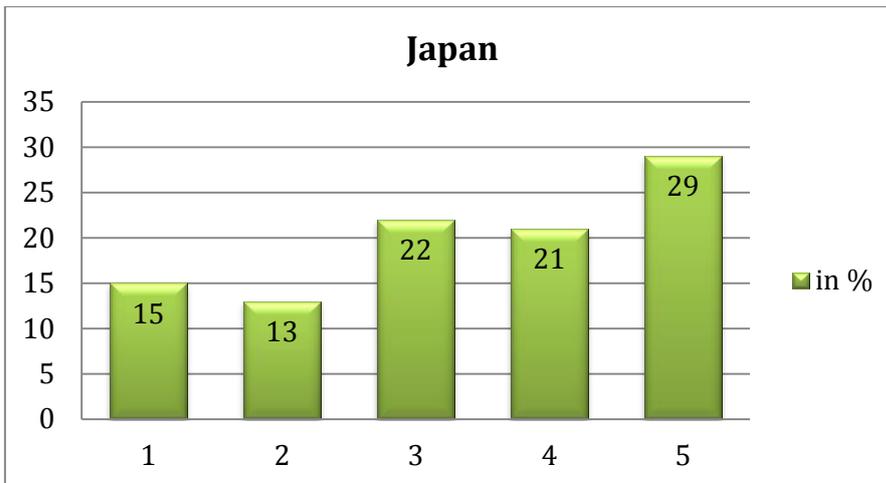
Using a scale of 1=not at all interested to 5=very interested, please rate the following countries on preferences for a holiday destination to an Asian country.



Appendix 3.7 Question 8 – part 2

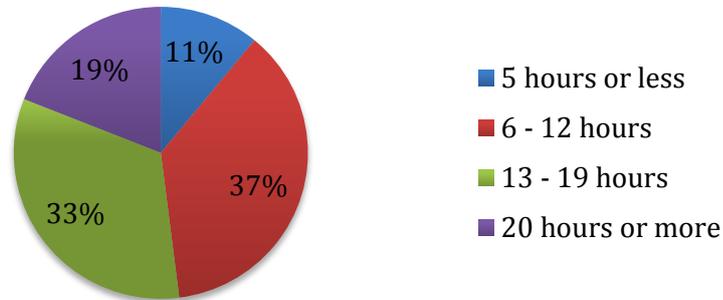


Appendix 3.8 Questions 8 (part 2), 9 and 10

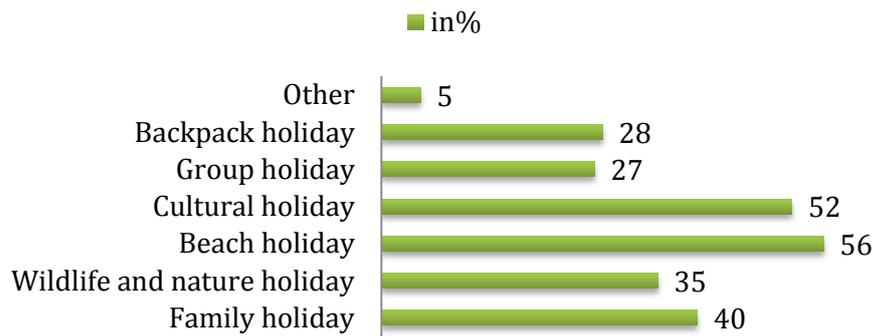


Appendix 3.9 Questions 11, 12 and 13

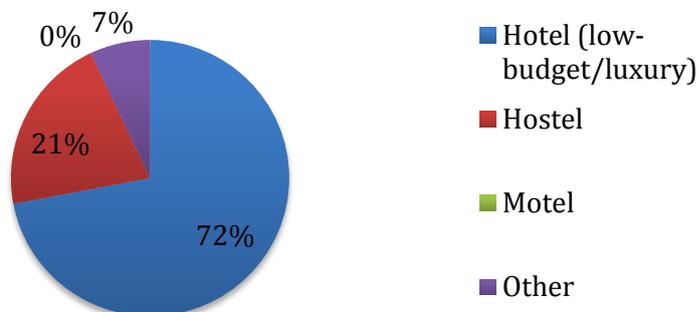
11) How far are you willing to fly to a holiday destination? (in hours)



12) What kind of holiday do you like the most?



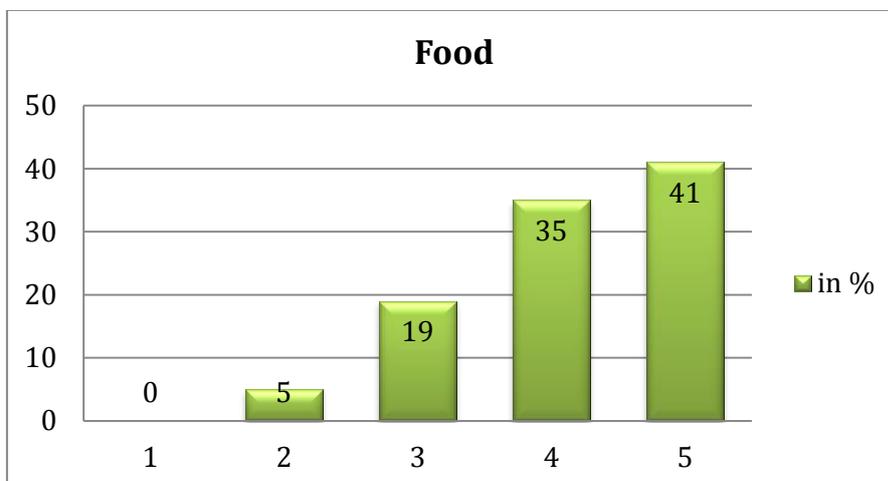
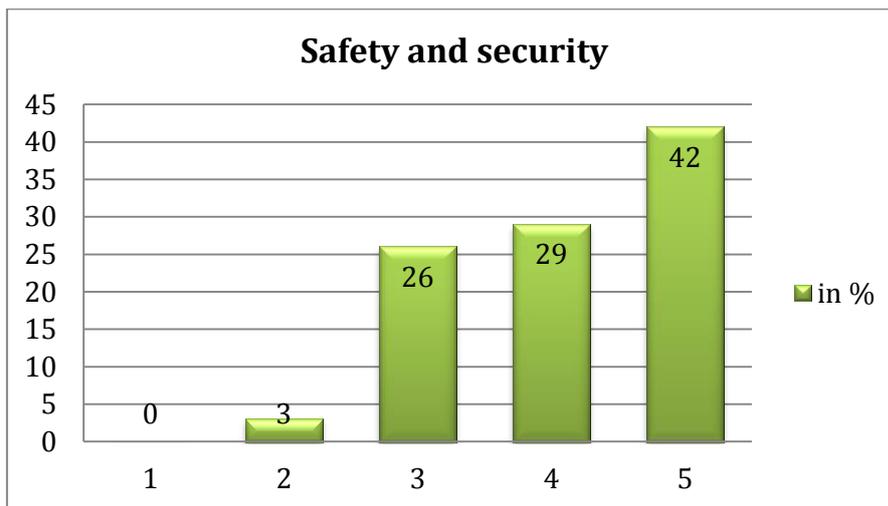
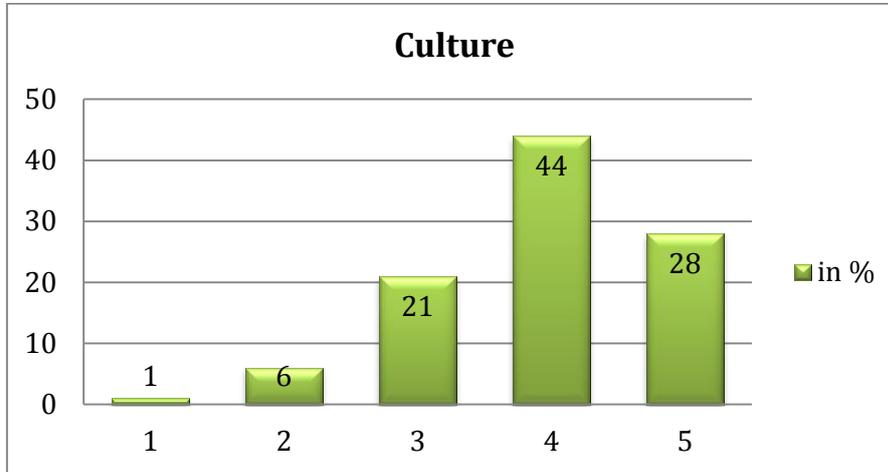
13) What kind of accomodation do you prefer to stay at?



Appendix 3.10 Question 14 - part 1

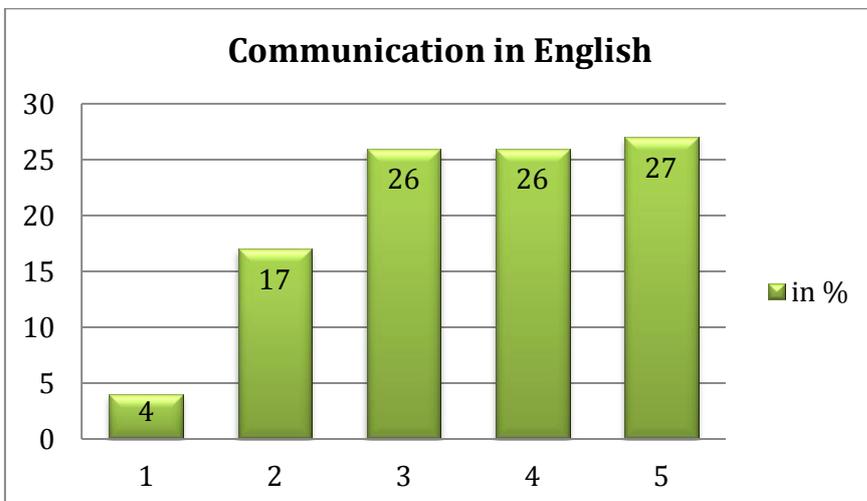
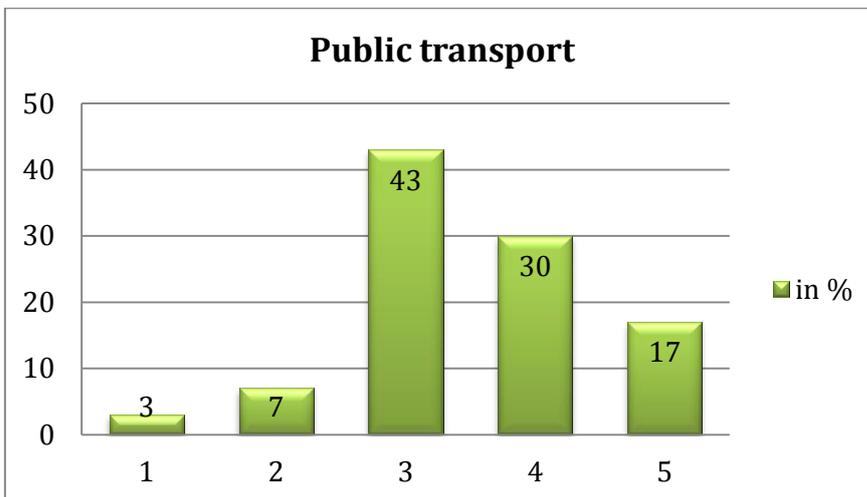
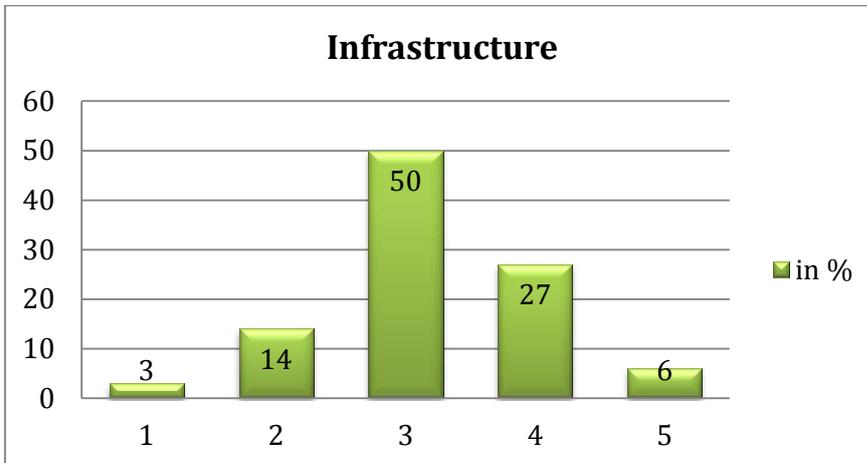
Question 14

Using a scale of 1=not at all important to 5=very important, please rate the following criteria on importance for a holiday destination.



Appendix 3.11 Question 14 - part 2

Continuation of question 14



Appendix 3.12 Questions 15 and 16

