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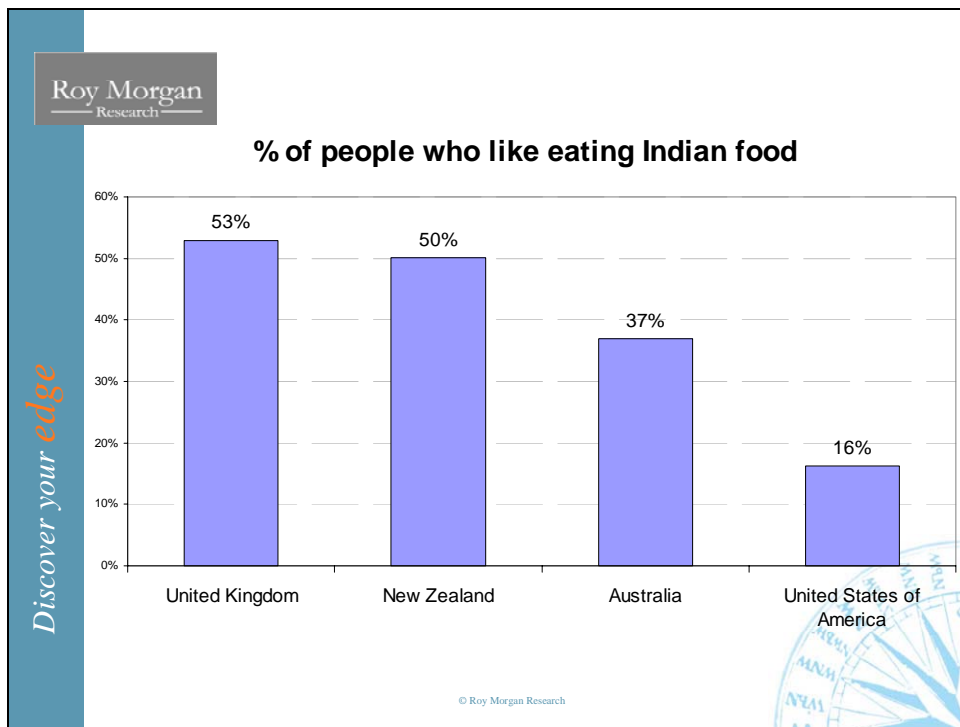
Doing Business Globally – Marketing “Brand India”

**India Conference
Melbourne, Australia
June 8-9, 2006**

By
Michele Levine, Chief Executive
Roy Morgan International
Melbourne, Australia

The world has entered a new era. This new era is one which is defined by globalisation, technology and communication, reduction in traditional boundaries, and stronger focus on international relationships and strategic alliances.

Globalisation is about the food we like to eat. Indian food is enjoyed by 53% of people in the UK, 50% of New Zealanders, 37% of Australians and 16% of Americans. Over 73 million people in just these four countries “like eating Indian food”.



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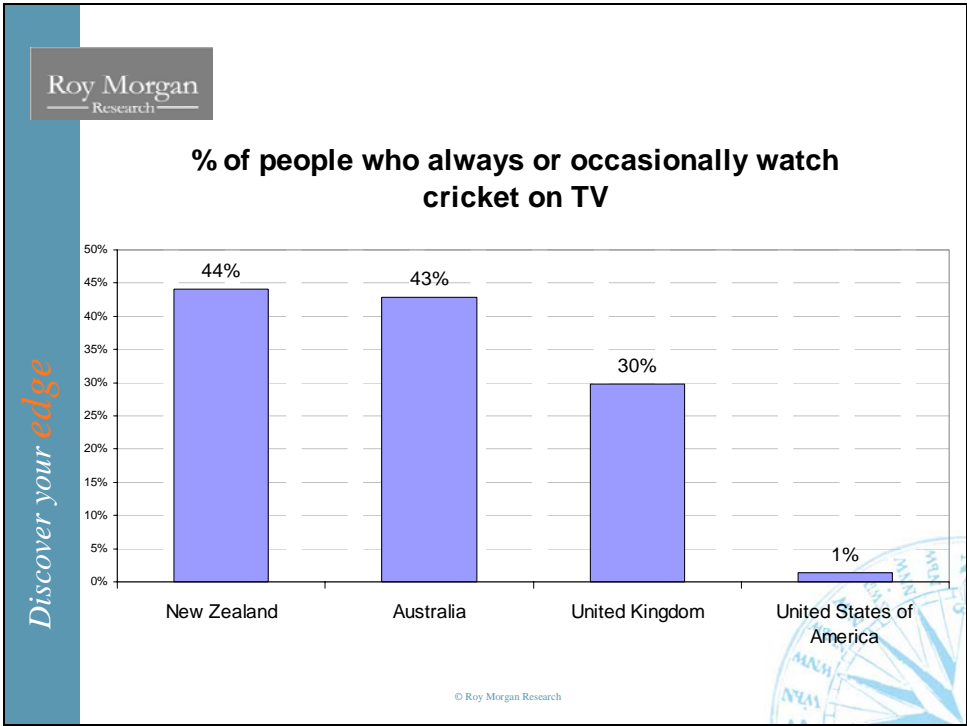
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Globalisation is about sport. 44% of New Zealanders and 43% of Australians watch cricket on TV “almost always or occasionally” as do 30% of people in the UK. Less than 2% of Americans watch cricket. Still, over these four countries, an estimated 27 million people watch international cricket.



If you look inside the twist bottle top on a bottle of Australian VB beer, you will likely find:

Q: “How many World Cup Finals has India contested?”

A: “Two (1983, 2003)”



Seriously, globalisation means that efficient supply is increasingly taking precedence over geographic proximity. Global alignments are increasingly impacting on all industries. The virtual organisation has become a reality.

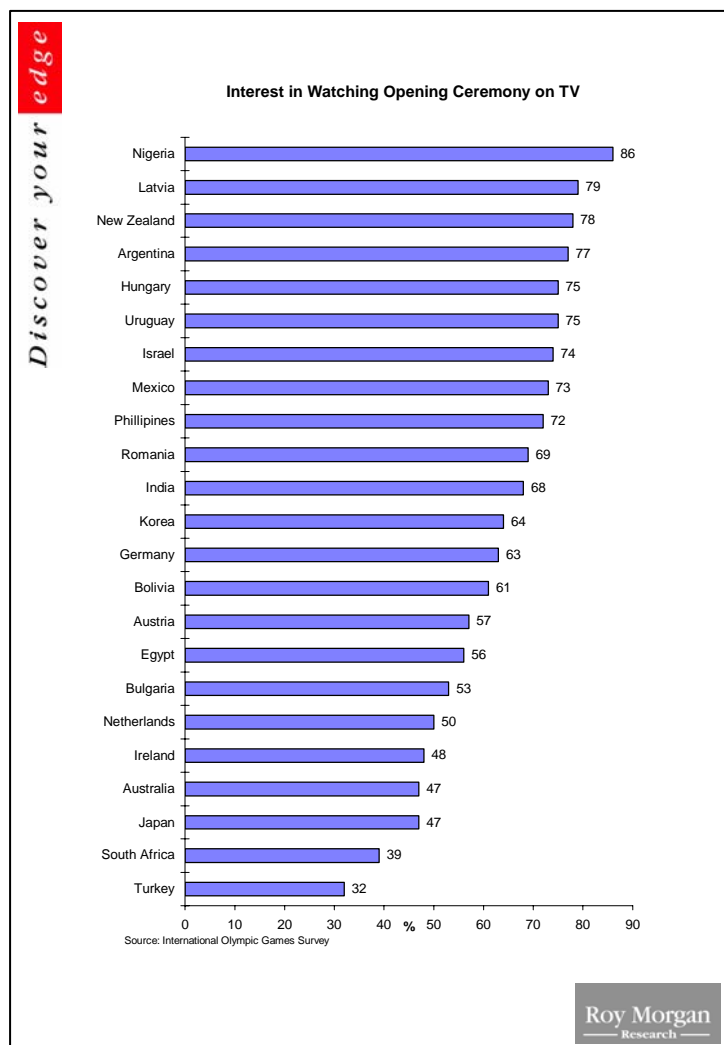
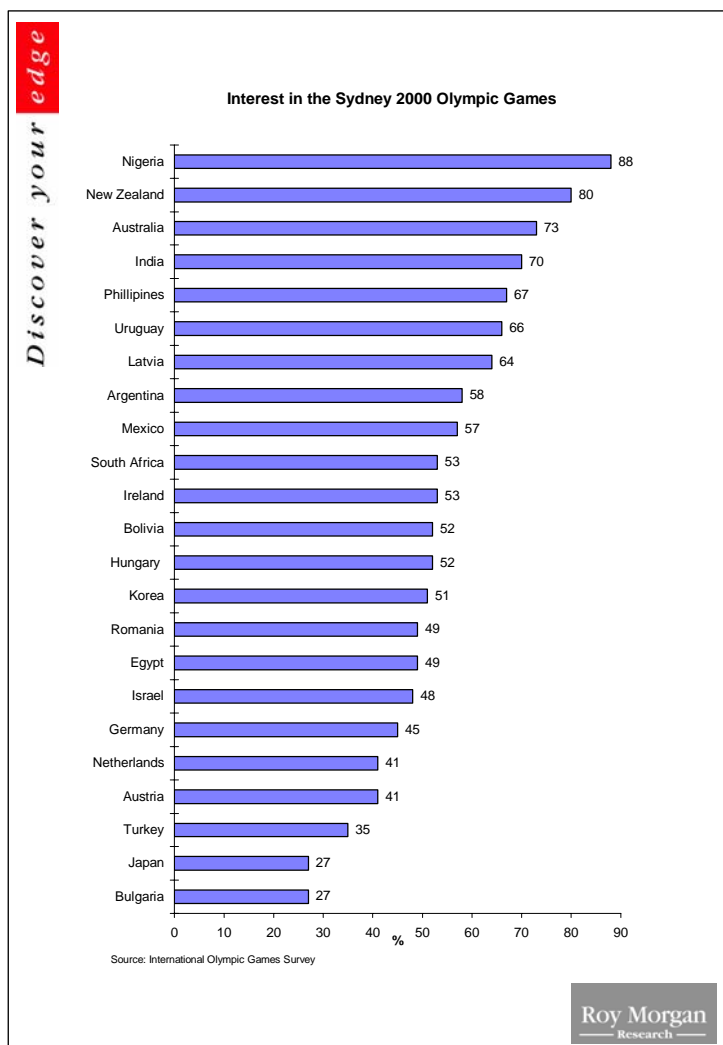
Technology has increased the speed with which we do almost everything - from the speed with which a highway or a car must be built, to the speed with which new technology itself can be created. Technology has also increased both the speed and complexity with which information can be transferred and processed with dramatic impacts on the speed of communication.

If we need further evidence of the power of global communication, we can turn to the numbers.

More Americans watch Aussie Rules than Australians. Almost seven and a half million Americans (7,496,000) watch Australian Rules Football at least occasionally on television. This means Australian Rules Football is viewed by more Americans than Australians (7,004,000)¹. More Democrats than Republicans watch Australian rules, and yes, they are more likely to drink Fosters!

This is really about the power of global communications. And it is global communications that made the Olympic Games so important to Australia; and globalisation is what today creates such an important opportunity for India with the Commonwealth Games.

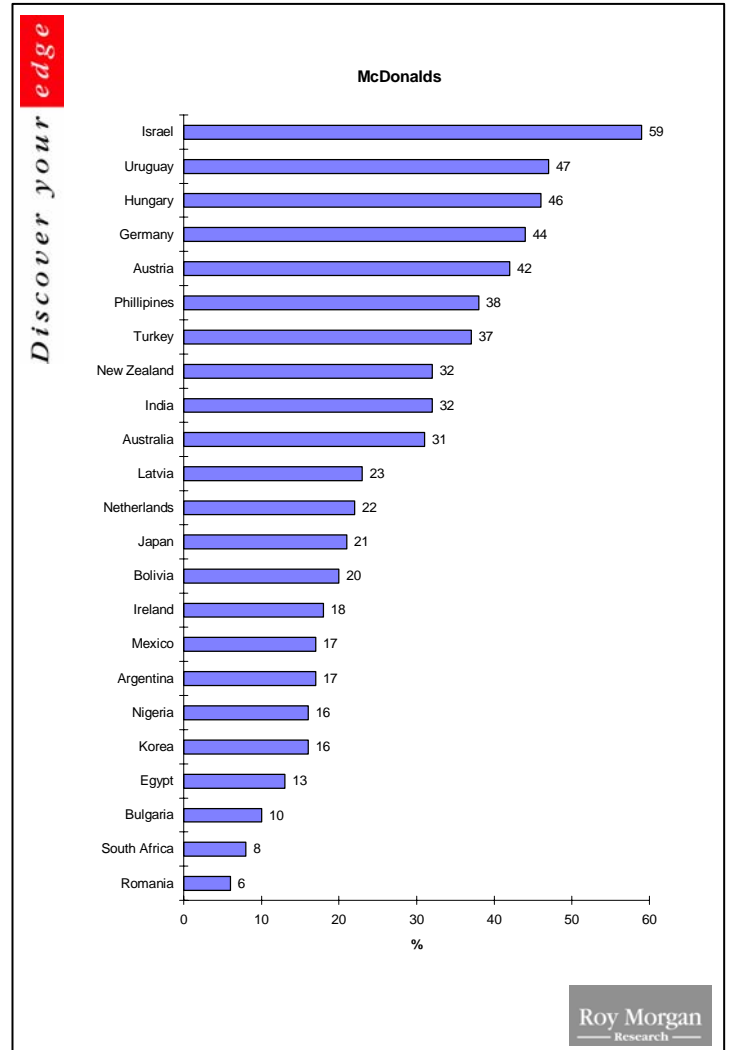
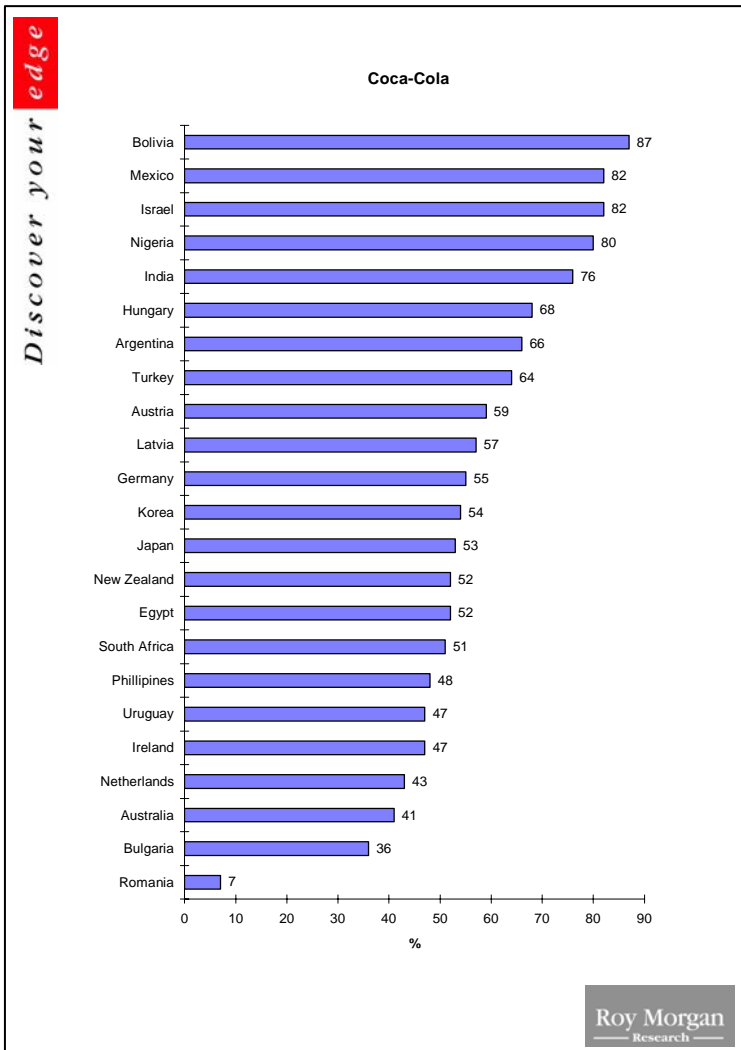
In 1998, Roy Morgan International and Gallup International measured [awareness and interest in the Sydney 2000 Olympic Games](#)². The following charts show that even two years before the Olympic Games, millions of people all around the world were interested in the Olympic Games, and in particular, the Opening Ceremony.



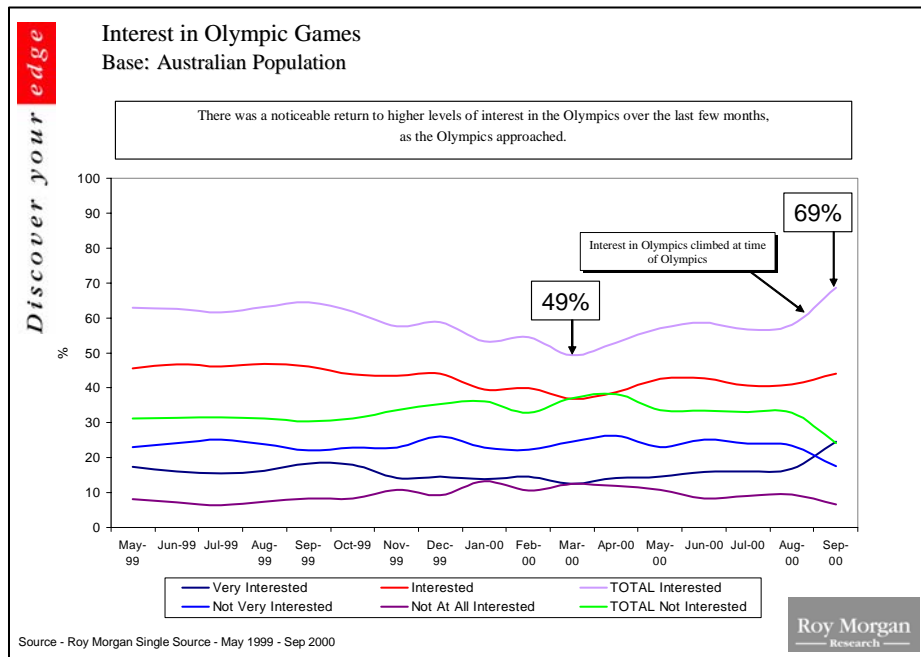
¹ Source: Roy Morgan Single Source USA Mar 2002-Feb 2004, Australia Apr 2003-Mar 2004

² The Gallup International Olympic Games Survey (<http://www.roymorgan.com/resources/pdf/papers/20000704.pdf>)

And millions of people were aware of the association of Coca-cola, McDonalds and many other products with the Olympic Games.



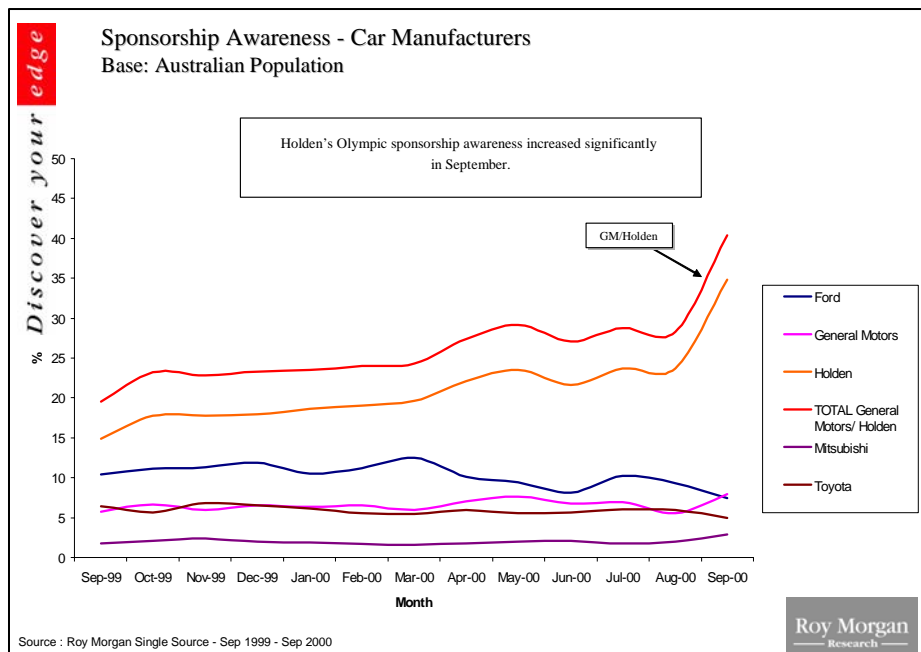
Australians' interest in the Sydney 2000 Olympic Games was 73% in early 1998 but declined to just over 60% in 1999 and 49% in March 2000. There was a noticeable return to higher levels of interest in the Olympics over the last few months as the Olympics approached.



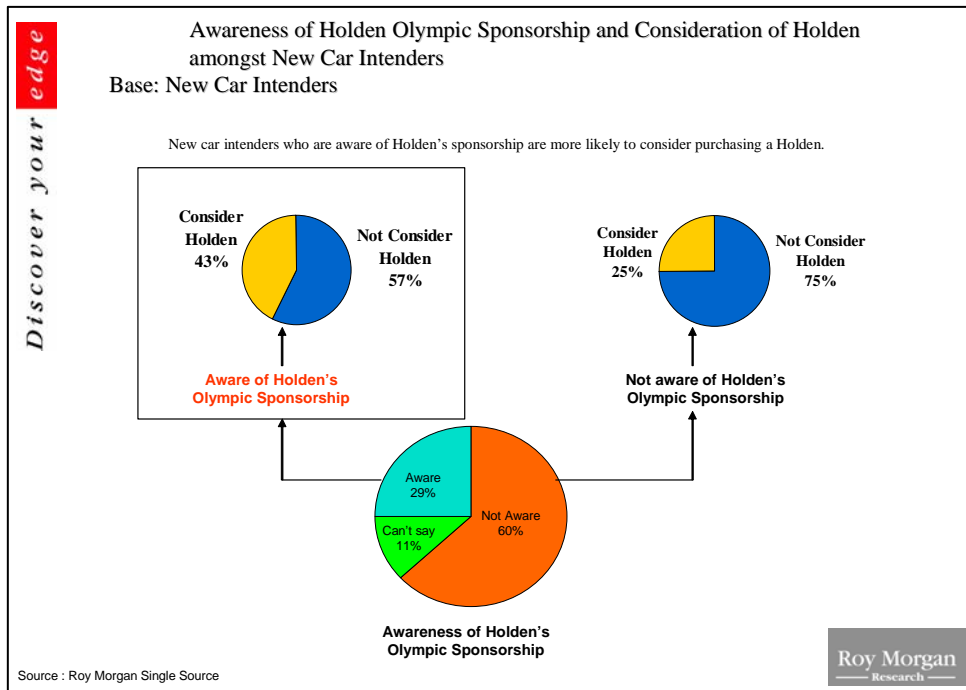
The symbiotic relationship between a major event such as the Games (Olympics or Commonwealth) and major corporations is a powerful value creating combination.

The value for sponsors is demonstrated clearly by research on Holden – a leading Australian car made by General Motors.

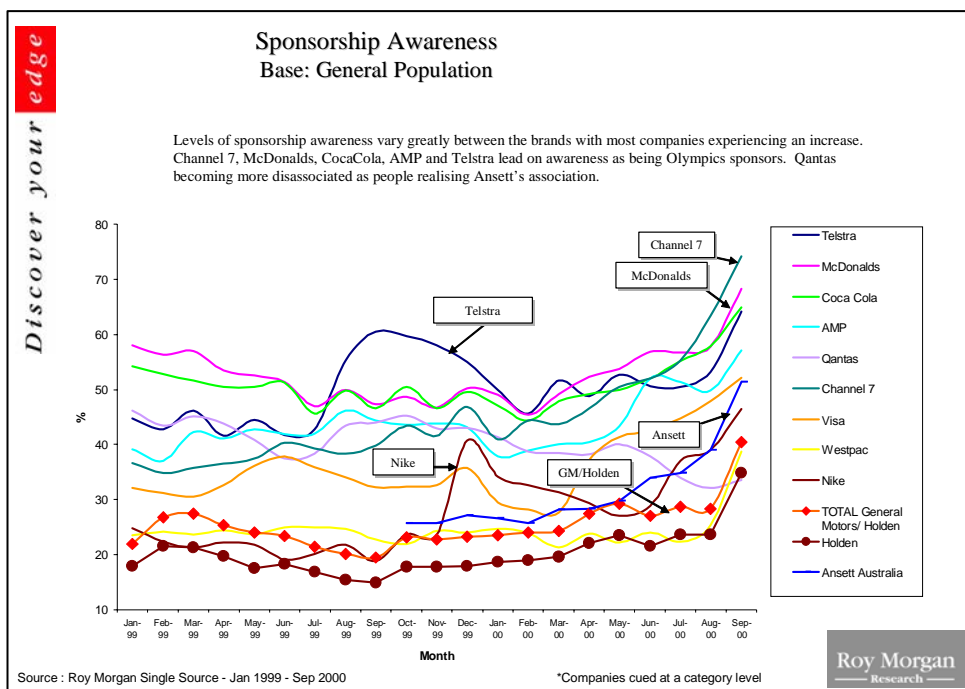
Awareness of General Motors/Holden's Olympic sponsorship increased significantly during the months leading to the Olympic Games.



Among intending new car buyers, Australians who were aware of Holden's sponsorship of the Sydney Olympic Games were more likely (43%) to be considering a Holden than those who were not aware of Holden's sponsorship (25% considering Holden).

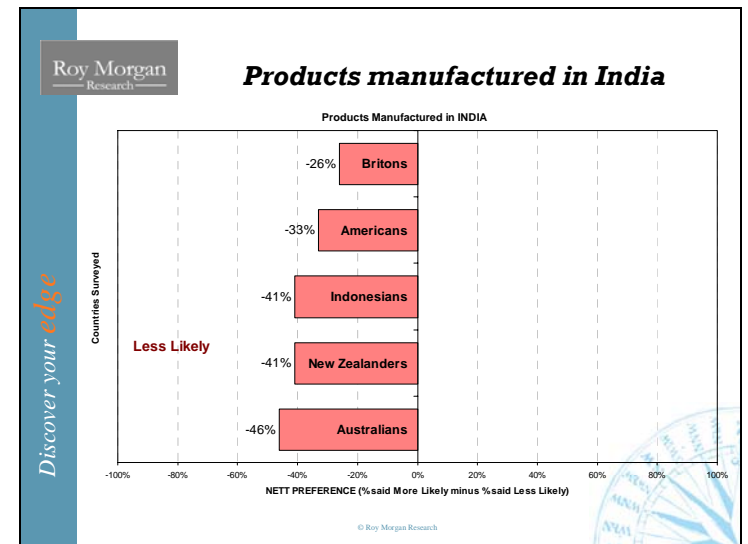
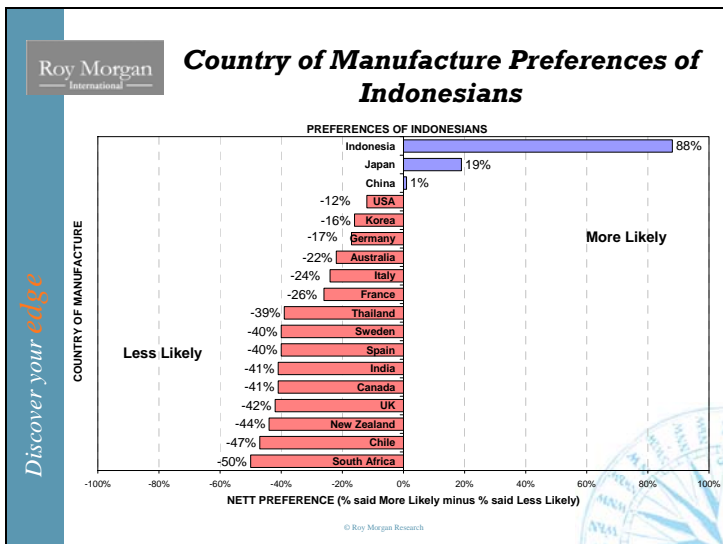
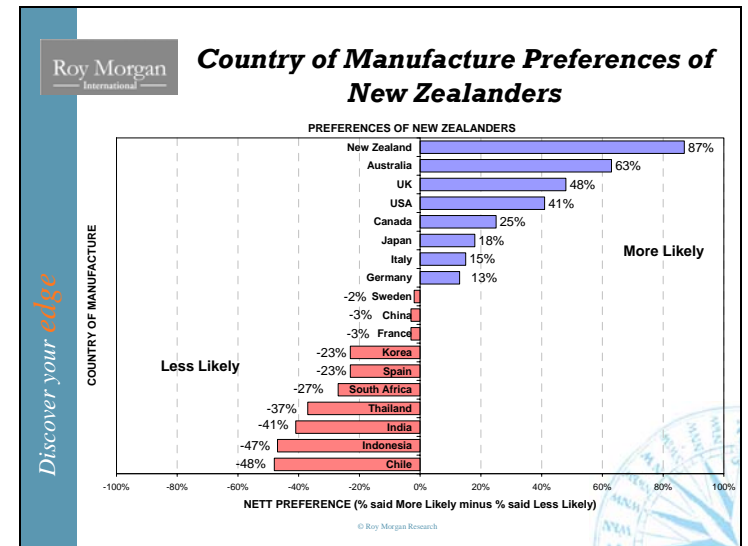
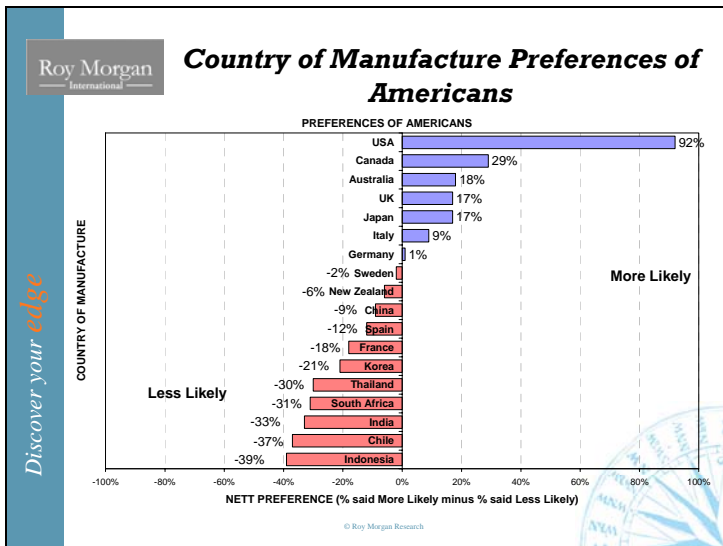
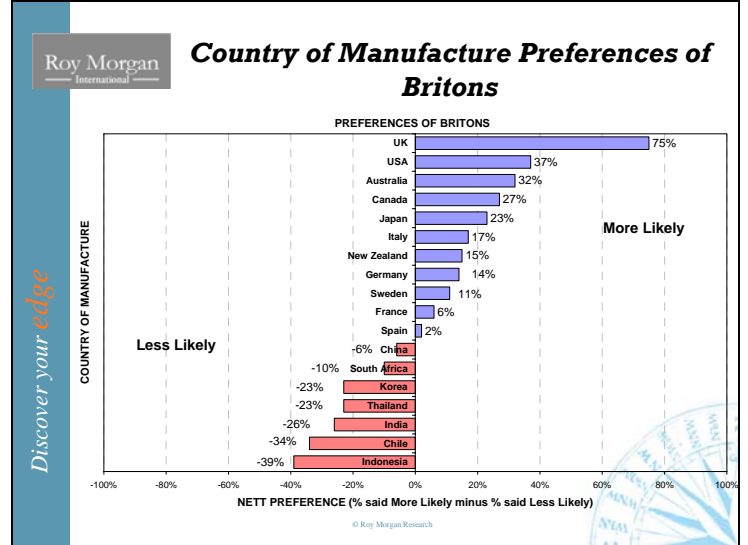
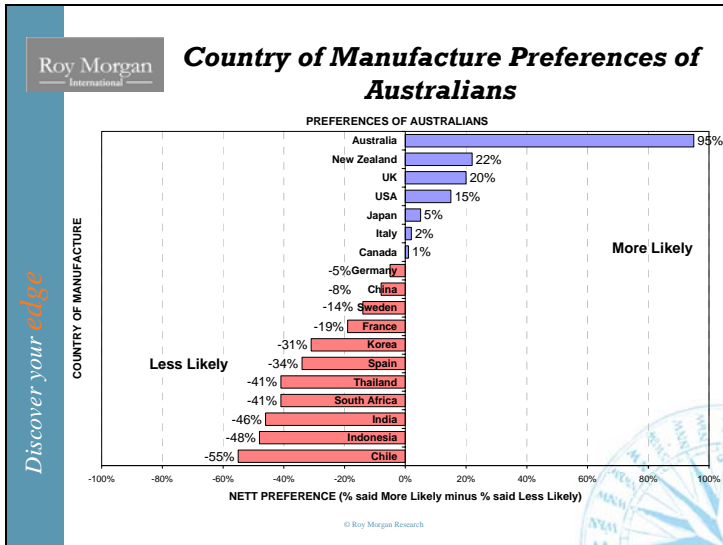


The following chart shows sponsorship awareness varies across companies over time, being dependent on the company's own promotional activities.

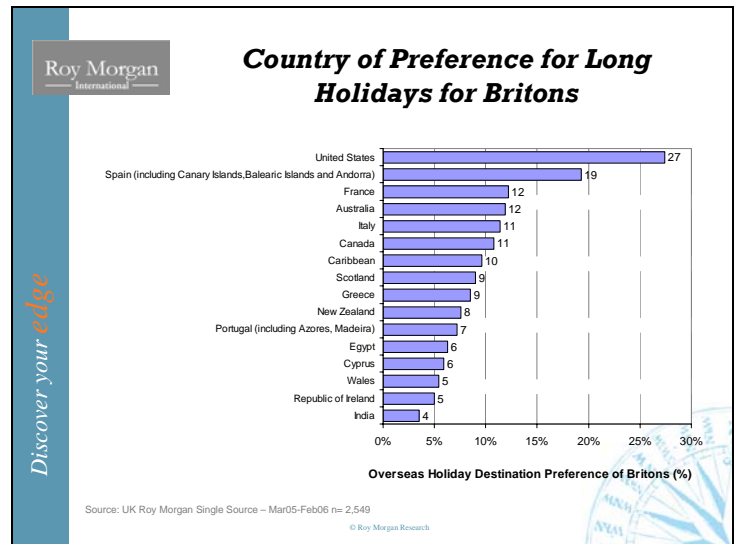
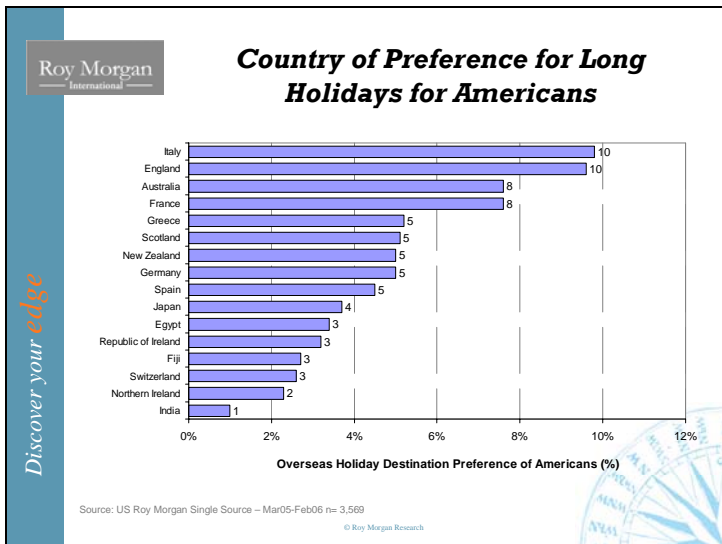
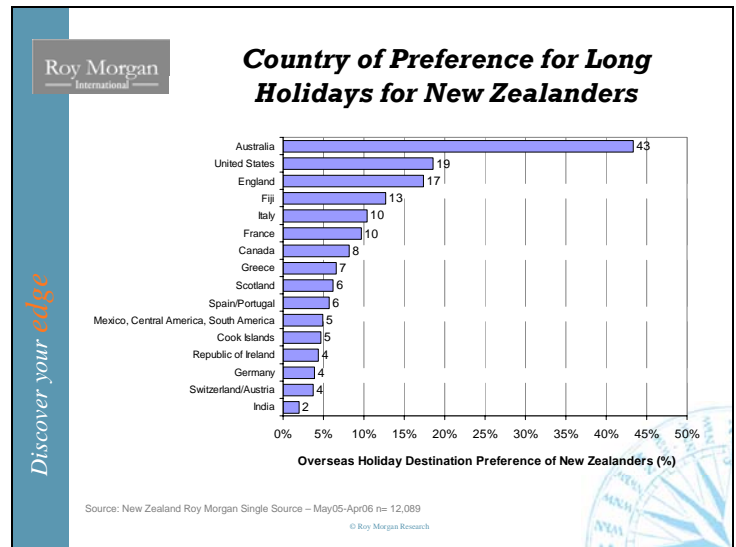
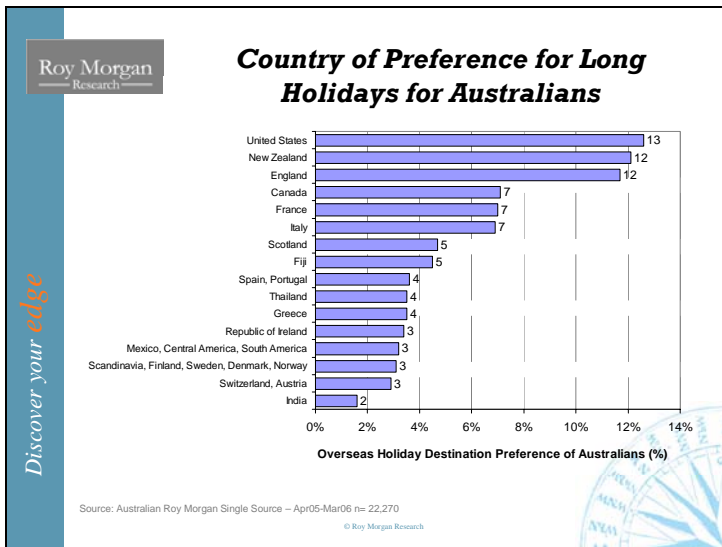


Today, with globalisation, the importance of an event such as the Olympic Games for Australia, or the Commonwealth Games for India, is greater than ever before.

Today, India – as a country of manufacture – does not rate well among consumers in Australia, US, UK or NZ.



Today, India is not on the top ten most popular destinations for people in the US, UK, Australia or New Zealand. Less than 5% in each of these countries would like to visit India.



However, India does not suffer from negative perceptions of being “too expensive to travel to” (1% or less); “unsafe” (less than 3%); concerns about their “political beliefs” (2% or less); or corruption (3% or less). (Details in “International Travel and Tourism Study” attached).

The issue for India is to build awareness and interest in the unique value of India - to improve its image as a place to visit, and ultimately, as a place to do business.

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International Travel & Tourism Study

(Published March 2005)

Roy Morgan International conducts surveys in the US, UK, Australia, New Zealand and Indonesia on a continuous basis. Respondents are asked about which countries they would like to visit (travel preference) and which countries they intend to travel to on their next holiday (travel intention). Other questions include airlines, hire cars and hotels preferred.

In November and early December 2003, Roy Morgan International conducted a special International Travel and Tourism Study in Australia, New Zealand, the United States and the United Kingdom.

The objective of the 2003 International Travel and Tourism Study was to create a substantive international framework of airline, travel and destination relevant benchmarks. Sample sizes for the survey were; Australia (n=1,032), New Zealand (n=2,315), the United Kingdom (n=2,022) and the United States of America (n=2,185).

The questions asked of respondents included:

1. **Travel intentions and recent travel** (with the aim of modelling intentions given terrorist activity in various locations)
 - a) Which countries people would like to visit;
 - b) Which countries people plan to visit (all and main destinations);
 - c) Which countries people would travel to if there were terrorist activity in or near their destination.

2. **Perceptions of countries** in terms of:
 - a) Would like to visit but too expensive to travel to;
 - b) Would like to visit but would not now because they are not safe;
 - c) Would not visit because don't like their political beliefs;
 - d) Would not visit because believe there is too much corruption.

3. **Airlines**
 - a) Preferred airlines for next international trip;
 - b) Perception of airlines in terms of safest in the world
 - c) Perception of airlines in terms of best value for money

Also collected was benchmark information on the level of safety in the country of survey (incidence of physical attacks or threats to safety on the street).

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The following tables show the results for selected questions on international travel intention, behaviour, from our ongoing Holiday Tracking Surveys, as well as attitudes to countries in terms of safety, expense, corruption, and political beliefs from the special 2003 survey.

If you require more information on these results or any of the other questions in the survey, please contact:

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Which countries would you like to visit?

England, Australia and Italy are the most popular countries people in the US would like to visit.

People surveyed in the UK were more likely to indicate they would like to visit India than those surveyed in the other three countries.

	COUNTRY SURVEYED			
	USA	UK	Australia	NZ
Sample size	1,681	1,095	9,382	7,819
Time period	Mar 03-Feb 04	Oct 03-Feb 04	Jan-Dec 04	Nov 03-Oct 04
India	3%	5%	3%	3%
United States	-	53%	33%	25%
Australia	25%	28%	-	73%
New Zealand	10%	17%	31%	-
England	28%	-	29%	29%
Canada	21%	20%	17%	14%
Italy	25%	24%	17%	17%
France	19%	36%	16%	16%
Fiji	7%	5%	12%	21%
Greece	13%	12%	9%	11%
Ireland	9%	22%	9%	8%
Thailand	4%	8%	9%	7%
Spain	13%	32%	8%	9%
Switzerland	8%	6%	8%	5%
Japan	8%	6%	7%	5%
Egypt	8%	8%	7%	6%
Germany	11%	8%	7%	7%
Singapore	2%	4%	6%	6%
Hong Kong	4%	6%	5%	5%
China (mainland)	4%	5%	5%	4%
Russia	3%	5%	5%	4%
Malaysia	1%	3%	4%	3%
South Africa	4%	7%	4%	4%
The Netherlands	4%	10%	3%	4%
Portugal	3%	12%	3%	3%

Base: Respondents who have a preference to travel overseas

Source: Single Source Holiday Tracking Studies (Aust, USA, UK, NZ)

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Do you intend to travel overseas for at least one night on your next trip?

Respondents in the UK (43%) and NZ (33%) are more likely to be planning to travel overseas on their next trip than those in Australia (19%) or the USA (19%).

	COUNTRIES SURVEYED			
	USA	UK	Australia	NZ
(Unweighted sample size)	3,275	1,570	24,516	12,583
TRAVEL ON NEXT TRIP				
Yes	19%	43%	19%	33%
No	81%	57%	81%	67%

Source: Single Source Holiday Tracking Studies (Aust, USA, UK, NZ)

Which is the main country you plan to travel to for your next international trip?

Almost two thirds (60%) of New Zealanders planned to visit Australia on their next trip, yet only 23% of Australians plan to visit New Zealand on their next trip.

Spain (25%) and France (22%) are the most popular European destinations for people from the UK.

For Americans, Canada (16%) is the most common main destination for intended international travel, edging out England (11%) and Italy (10%). Of the four countries surveyed, Americans had the highest intention to visit India (4%).

Market	COUNTRY SURVEYED			
	USA	UK	Australia	NZ
Sample size	630	685	4,023	4,075
Weighted Population ('000)	44,833	21,087	3,093	1,046
Time period	Mar 03-Feb 04	Oct 03 - Feb 04	Jan-Dec 04	Nov 03 - Oct 04
India	4%	2%	2%	1%
United States	-	22%	20%	12%
Australia	6%	10%	-	60%
New Zealand	4%	4%	23%	-
England	15%	-	22%	14%
France	10%	22%	13%	6%
Italy	11%	10%	11%	6%
Singapore	0%	3%	8%	5%
Canada	16%	5%	8%	5%
Thailand	1%	3%	8%	4%
Fiji	2%	1%	7%	8%
Germany	7%	3%	6%	3%
Hong Kong	1%	2%	6%	3%
Ireland	5%	9%	5%	3%
Switzerland	4%	2%	5%	2%
Spain	5%	25%	5%	3%
Japan	3%	2%	5%	2%
Malaysia	1%	1%	5%	2%
Greece	5%	4%	5%	3%
China (mainland)	1%	1%	4%	2%
Russia	2%	1%	3%	2%
The Netherlands	4%	4%	3%	2%
Egypt	2%	2%	3%	1%
South Africa	1%	2%	2%	2%
Portugal	1%	3%	1%	1%

Base: Respondents who intend to travel overseas on their next trip

Source: Single Source Holiday Tracking Studies (Aust, USA, UK, NZ)

Which countries would you like to visit but believe they are too expensive to travel to?

Australia ranked highest amongst Americans (20%) and Britons (26%) as a country they would like to visit but consider too expensive to travel to.

The US was seen as a desirable but expensive location for high proportions of Australians (23%), New Zealanders (23%) and Britons (20%).

New Zealanders (30%) and Australians (21%) considered the UK to be a country they would like to visit but considered it too expensive.

	USA	UK	Australia	NZ
(Unweighted sample size)	2,185	2,022	1,032	2,312
India	0.5%	1%	*	*
United States	–	20%	23%	23%
Australia	20%	26%	–	4%
France	11%	2%	5%	4%
United Kingdom	10%	–	21%	30%
Japan	10%	6%	6%	4%
Italy	8%	2%	3%	3%
Germany	5%	1%	2%	1%
New Zealand	4%	13%	2%	–
Switzerland	3%	2%	3%	2%
Ireland	3%	1%	2%	1%
China	3%	3%	1%	1%
Canada	1%	5%	4%	5%

* Less than 0.5%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003

Which countries would you like to visit but would not visit now because they are not safe?

Amongst Americans, Israel (18%) and Iraq (15%) were most likely to be mentioned as countries they would like to visit but would not due to safety concerns.

Iraq (13%) and Turkey (10%) received the most mentions by Britons.

Amongst Australians, the United States (13%), Indonesia (11%) and Iraq (10%) ranked highest.

Similarly in New Zealand, the US (14%), Iraq (13%) and Indonesia (11%) were countries that New Zealanders would like to visit but considered unsafe.

	USA	UK	Australia	NZ
(Unweighted sample size)	2,185	2,022	1,032	2,312
India	1.5%	2%	1.5%	2.5%
USA	–	7%	13%	14%
Israel	18%	8%	6%	7%
Iraq	15%	13%	10%	13%
Egypt	7%	6%	8%	3%
Turkey	4%	10%	6%	3%
Afghanistan	4%	3%	5%	6%
Iran	4%	3%	3%	5%
China	3%	1%	1%	1%
Indonesia	1%	3%	11%	11%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003

For respondents planning to travel to either Australia, NZ, USA or the UK in the next 3 years, only a very small percentage of people felt that these countries were not safe at present. Of the respondents planning to visit the USA, only 3% felt that the US was currently unsafe.

Countries plan to visit in next 3 years.

	USA	Australia	NZ	UK
(Unweighted sample size)	755	1,253	210	615
Which Countries would you like to visit but believe that they are not safe?				
USA	3%	3%	5%	1%
UK	0%	1%	0%	1%
Australia	0%	1%	0%	0%
NZ	0%	0%	0%	0%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003

Which countries would you not visit because of their political beliefs?

Iraq ranked highest in all countries (US - 16%, UK - 10%, Australia - 9%, NZ - 10%) as a place people would not visit because of the country's political beliefs.

Interestingly, the US ranked quite highly in Australia (7%) and New Zealand (7%) as a country that would not be visited because of its political beliefs.

	USA	UK	Australia	NZ
(Unweighted sample size)	2,185	2,022	1,032	2,312
India	1%	2%	1.5%	2%
USA	–	4%	7%	7%
Iraq	16%	10%	9%	10%
Iran	9%	4%	5%	6%
France	9%	2%	0%	0%
China	8%	4%	6%	6%
Russia	7%	3%	5%	3%
North Korea	5%	1%	2%	2%
Cuba	5%	1%	1%	1%
Saudi Arabia	4%	2%	3%	2%
Germany	4%	1%	1%	1%
Afghanistan	3%	2%	4%	4%
Israel	3%	3%	3%	3%
South Africa	1%	4%	3%	3%
Zimbabwe	0%	4%	8%	4%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003

Which countries would you not visit because you believe there is too much corruption?

Amongst Americans, Iraq (13%) received the most mentions as country that would not be visited because of corruption, with Russia being mentioned by 9% and Mexico by 6% of Americans.

Britons most mentioned Iraq (7%), Russia (6%) and the US (5%).

The US ranked highest amongst Australians with 8% saying they would not visit the country because of a perception of corruption, followed by Russia (6%) and Iraq (5%).

New Zealanders mentioned Iraq (8%), the US (7%) and Russia (5%) as countries they would not visit because of a perception of corruption in those countries.

	USA	UK	Australia	NZ
(Unweighted sample size)	2,185	2,022	1,032	2,312
India	1%	2%	3%	3%
USA	–	5%	8%	7%
Iraq	13%	7%	5%	8%
Russia	9%	6%	6%	5%
Mexico	6%	1%	1%	1%
Colombia	5%	3%	3%	1%
Iran	5%	2%	2%	3%
China	4%	2%	2%	3%
Afghanistan	4%	1%	1%	3%
Cuba	4%	2%	1%	1%
North Korea	2%	0%	1%	1%
Saudi Arabia	2%	1%	1%	1%
South Africa	2%	3%	2%	3%
Pakistan	1%	2%	1%	2%
Nigeria	1%	3%	0%	1%
Philippines	1%	1%	3%	2%
Zimbabwe	0%	3%	3%	3%

Source: Roy Morgan International Travel and Tourism Survey, Nov-Dec 2003