

Final Report

Study on Development of Methodology for Impact Assessment of Last 3 Years Participation in Two Major Fairs in the World



Prepared by:



Business & Industrial Research Division
Of



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C. Executive Summary

Background of the Study

Ministry of Tourism has been participating in two major trade fairs in the world – the **W**orld **T**ravel **M**arket (WTM) at London and **I**nternationale **T**ourismus-**B**örse (ITB) at Berlin – for the past several years. The major objectives of the participation by the Ministry are as follows:

- **Objective 1:** Making an effective, impactful and visible presence of India in these events,
- **Objective 2:** Interaction with Government officials and B2B meetings,
- **Objective 3:** Facilitating stake holders to showcase their products and generate business through B2B meetings with the international trade who participates in these events in large numbers,
- **Objective 4:** Facilitating States / Union Territories to showcase their tourism destinations and products,
- **Objective 5:** Offering a platform to interact with foreign buyers and organizing occasions like Happy Hours, Breakfast Meetings, Cocktail Events, and India Evenings during the above mentioned events, and,
- **Objective 6:** Supporting the smaller service providers by way of offering a fully constructed booth within the India Pavilion at subsidized rates.

Ministry of Tourism appointed BIRD, the **B**usiness & **I**ndustrial **R**esearch **D**ivision of IMRB International to conduct a study to understand the impact. The objective of the study was ***"to develop and implement a methodology to assess the impact of India's participation in two major world fairs during the last three years."***

The objective of the study was achieved using analysis of information obtained through primary research conducted among co-exhibitors/participants in the two major fairs over 2012 – 2014. In addition, secondary information such as reports on two fairs (as available in public domain) and that provided by various divisions/departments of Ministry of Tourism were also used.

Overview of the Two World Fairs

WTM or **W**orld **T**ravel **M**arket is a business-to-business event on global travel industry organized in London (UK). It was launched in London's Olympia in 1982 but moved to Earl's Court in 1992. Since 2002 it is being organized at ExCel London. Reed Exhibitions is the event organizer for WTM.

ITB or **I**nternationale **T**ourismus-**B**örse is considered to be the world's largest tourism trade fair organized at Berlin each year. The companies participating in the fair include government agencies like tourism boards of various countries, hotels, tour operators, airlines, car rental companies and other tourism / travel service providers.

India's Participation in the Two World Fairs & Its Impact

India participated in the two world fairs, as mentioned above, over 2011 to 2014. In each of these years close to 50 co-exhibitors/participants set up their booth/stall in the India Pavilion. Various meetings were organized by the Ministry including happy hours, breakfast meetings, cocktail events, India evenings in order to boost informal discussion and networking with an intention to achieve the overall objectives of the study.

Importance of various objectives of India's participation and their achievement has been measured, in one way, by understanding the perception/opinion of co-exhibitors/participants regarding these. While the importance was rated on a 5 point scale (with score of 1 referring to no-importance and 5 referring to high importance), the achievement was rated on a 3 point scale (with score of 1 referring to no achievement and 3 referring to full achievement).

Therefore, at an absolute level, the level of importance and level of achievement of various objectives is given below:

Objective	Importance	Achievement
Making an effective, impactful and visible presence of India in these events.	Very High	Medium
Interacting with government officials and organizing business-to-business (B2B) meetings.	Very High	Medium
Facilitating stake holders to showcase their products and generate business through business-to-business (B2B) meetings with the international trade who participates in these events in large numbers.	Very High	Medium
Facilitating states and/or union territories of India to showcase their tourism destinations and products.	High	Medium
Offering a platform to interact with foreign buyers and organizing occasions like happy hours, breakfast meetings, cocktail events, and India Evenings during the above mentioned events.	High	Medium
Supporting the smaller service providers by way of offering a fully constructed booth within the India Pavilion at subsidized rates.	Very High	High

While all the objectives have a high/very high importance, the level of achievement is considered to medium for most. However, Ministry has a good achievement in supporting the smaller service providers. This is as per the perception of co-exhibitors/participants.

Another method of evaluating the objectives of the study was executed in the following way:

- **Defining impact:** Impact of India's participation in WTM (London) and ITB (Berlin) is achievement / non-achievement of laid down objectives of participation in the two fairs.
- **Identifying Measurable Parameters:** For e.g. "making an effective, impactful and visible presence of India in these events" is one of the objectives of participation. This was measured in terms of three parameters (as given above):
 - Number of people visiting the India pavilion in the fair,
 - Proportion of B2B visitors out of the total people visiting the Indian pavilion, and,
 - Recall of Indian pavilion and specific stalls/booths in it by the visitors after the fair.
- **Observing Change in Values of Parameters:** This was done by calculating CAGR i.e. cumulative annual growth rate from the base year (2011) to the final year (2014) for values of each of the above parameters.
- **Assigning Weights to Objectives:** This was done by taking opinion of co-exhibitors/participants on the importance of these objectives. This opinion was taken on a five point scale where 1 meant not-at-all-important and 5 meant highly-important. An aggregation of these rank values provided weights to various objectives.
- **Taking Weighted Average:** The final values, thus obtained, for each of the world fairs gave the impact score of India's participation in the given world fair.

Chart below shows the achievement of objectives for WTM, London on a year on year (in bars) basis and over the period 2011-2014 (in line):

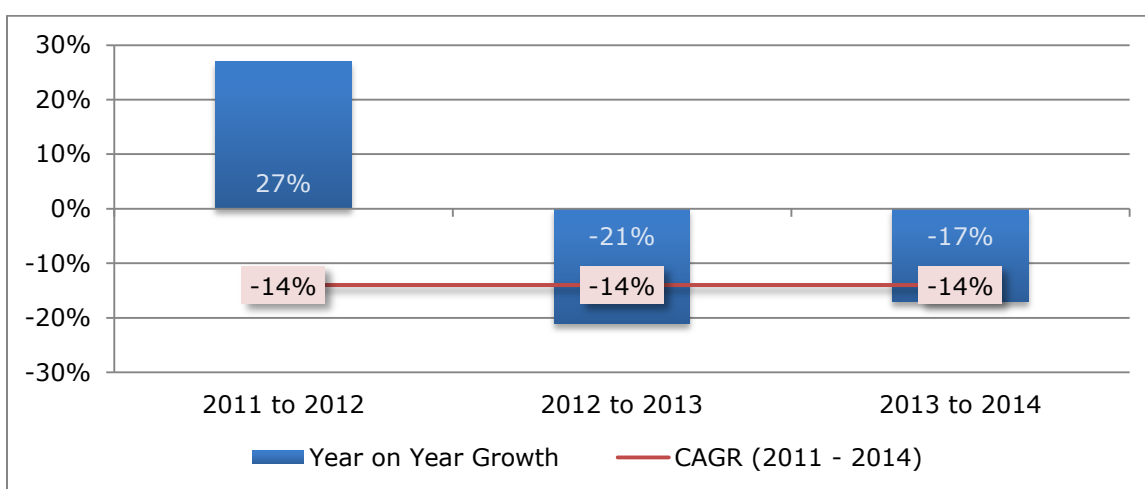
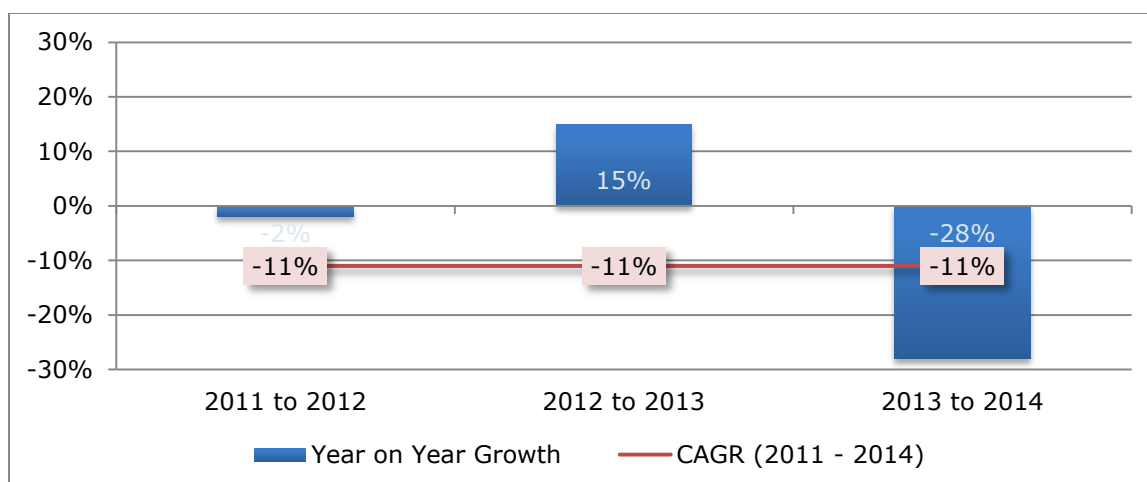


Chart below shows the achievement of objectives for WTM, London on a year on year (in bars) basis and over the period 2011-2014 (in line):



When all the indices are analysed together, it was found that there has been lesser achievement over the last three years as compared to 2011 for both the fairs. In WTM, London the decrease in achievement is around 15%% while for ITB, Berlin is around 12%.

On a year-on-year basis, achievement in WTM London was around 27% more in 2012 as compared to 2011. However, for the next two years there has been a decline in the achievement as compared to the immediate previous years.

During these three years, following was the visitor attendance in WTM, London.

Statistics	2011	2012	2013	2014
Visitors	28,155	29,000	78,035	82,213

Over 2011, the visitors have seen a rise of 43% on a CAGR basis. This is a huge achievement over the years. Clearly, Indian pavilion falls short of this benchmark and needs to step up its performance.

For ITB Berlin, there was a minor decrease in achievement during 2012 as compared to 2011. However, in 2013, there was a 15% increase in achievement of objectives over 2012. Then again in 2014, there was an almost 28% reduction in achievement.

During these three years, the overall performance of ITB was largely constant – in terms of countries & exhibitors participating and trade visitors attending the mart. This is summarized in the table below.

Statistics	2012	2013	2014
Countries	187	188	189
Exhibitors	10,644	10,086	10,147
Trade Visitors	~ 113,000	~ 110,000	~ 114,000

Given the above, improvement is needed in India's performance in International Tourism Bourse.

Recommendations for Future Participation

Due to absence of database for visitors to India pavilion, a web-survey among them could not be conducted. Therefore, it is important to collect visitor information while they are in the India pavilion. This could be done by:

- Requesting for business cards of visitors at entry / exit points of the pavilion. This would work well for B2B visitors.
- Maintaining a register of records where visitors can provide their names and contact details.

However, despite this it is possible that a large proportion of visitors either does not record their details in the register or do not deposit their business cards. Therefore, we recommend conduction of a quick survey with visitors at the exit point of the pavilion or the fair itself. The major information areas which can be collected from such visitors would include:

- Their recall of India pavilion and its specific aspects (such as some specific booths or design).
- Their opinion on the look and feel and coverage of the India pavilion.
- Whether the products / services showcased have been able to address their requirements?
- What is the level of satisfaction of their visit to the India pavilion.

The above survey can be either through a self-filled form. Alternatively, Ministry of Tourism can employ a specialized primary survey agency to carry out this survey.

D. Study Background, Objectives & Methodology

Background of the Study

Ministry of Tourism has been participating in two major trade fairs in the world – the **W**orld **T**ravel **M**arket (WTM) at London and **I**nternationale **T**ourismus-**B**örse (ITB) at Berlin – for the past several years. These events provide an excellent opportunity for showcasing and sourcing new products and services and to learn about the worldwide trends and patterns affecting tourism to various regions. This participation is a part of Ministry's direct marketing initiative.

The major objectives of the participation are as follows:

- **Objective 1:** Making an effective, impactful and visible presence of India in these events,
- **Objective 2:** Interaction with Government officials and B2B meetings,
- **Objective 3:** Facilitating stake holders to showcase their products and generate business through B2B meetings with the international trade who participates in these events in large numbers,
- **Objective 4:** Facilitating States/ Union Territories to showcase their tourism destinations and products,
- **Objective 5:** Offering a platform to interact with foreign buyers and organizing occasions like Happy Hours, Breakfast Meetings, Cocktail Events, and India Evenings during the above mentioned events, and,
- **Objective 6:** Supporting the smaller service providers by way of offering a fully constructed booth within the India Pavilion at subsidized rates.

Ministry of Tourism wanted to understand whether or not there has been any impact of India's participation (over the last three years i.e. 2012, 2013 and 2014) on the above objectives. Therefore, the Ministry appointed BIRD, the **B**usiness & **I**ndustrial **R**esearch **D**ivision of IMRB International to conduct a study to understand the impact. This final report by BIRD of IMRB International presents the complete findings from the secondary research (based on data provided by the Ministry) and primary survey among co-exhibitors/participants.

Objectives of the Study

The main objective of the study was **"to develop and implement a methodology to assess the impact of India's participation in two major world fairs during the last three years."**

The sub-objectives of the study were as follows:

1. To develop a methodology for impact assessment study of last three years participation in WTM, London and ITB, Berlin in view of objectives (as outlined in the previous section) of participation in the fairs.
2. Implementation of the developed methodology and recommendations on the basis of findings in order to optimize returns on investment.

Research Methodology

In order to achieve the objectives of the study, a two phase approach was used. This is highlighted below:

Development of Methodology

The first sub-objective of the study was to develop a methodology to assess the impact of last three years participation. In order to do some quantifiable parameters, which can measure the level of success of each of the objectives of participation in these two fairs, were identified.

This is depicted below:



These identified parameters are listed below:

Objectives of participation	Indicative parameters for measurement
Making an effective, impactful and visible presence of India in these events.	<ul style="list-style-type: none"> ➤ Number of people visiting the India pavilion in the fair (Source: secondary research) ➤ Proportion of B2B visitors out of the total people visiting the Indian pavilion (Source: primary research among co-exhibitors/participants). ➤ Recall of Indian pavilion and specific stalls/booths in it by the visitors after the fair (Source: primary research among visitors)
Interaction with Government officials and B2B meetings.	<ul style="list-style-type: none"> ➤ Number of meeting organized with government officials (Source: primary research among co-exhibitors/participants) ➤ Number of B2B meetings (Source: primary research among co-exhibitors/participants)
Facilitating stake holders to showcase their products and generate business through B2B	<ul style="list-style-type: none"> ➤ Business generation / orders booked by co-exhibitors/participants in the fair during the fair (Source: primary research among co-

Objectives of participation	Indicative parameters for measurement
meetings with the international trade who participates in these events in large numbers.	exhibitors/participants)
Facilitating States/ Union Territories to showcase their tourism destinations and products.	➤ Number of states / union territories participating (Source: secondary research) ➤ Total area of stalls/booths of these states / union territories (Source: secondary research)
Offering a platform to interact with foreign buyers and organizing occasions like Happy Hours, Breakfast Meetings, Cocktail Events, and India Evenings during the above mentioned events.	➤ Number of such events organized of each type (Source: secondary research) ➤ Total number of invitees/attendees (Source: secondary research) ➤ Total investment in organization of such events (Source: secondary research)
Supporting the smaller service providers by way of offering a fully constructed booth within the India Pavilion at subsidized rates.	➤ Number of service providers participating (Source: secondary research) ➤ Total area of stalls/booths of these states / union territories (Source: secondary research)

The criteria for selection of these parameters were as follows:

- Parameter had to be logically understood to have impacted the objective of participation in the fair, and,
- Parameter had to be readily available for analysis. Thus, for example, number of people visiting the Indian pavilion in the fair can be a parameter only if such a data is available for past three years with Ministry of Tourism /Exhibitors with full contact details including email.

The second step was the development of data collection format (such as questionnaire, data collection tables etc.) for the study. These data collection formats were prepared and presented in the inception report for the study and were approved by the Ministry of Tourism.

Implementation of Methodology

In order to achieve the second sub-objective of the study i.e. implementation of the finalized methodology both primary and secondary research methods were used.

Secondary Research

Secondary research involved collection and analysis of already existing / compiled data points. Various data points required for the study (such as number of meeting organized with government officials, number of states / union territories participating, total area of stalls/booths of these states / union territories etc.) were collected using secondary sources. These sources included various divisions/wings of Ministry of Tourism such as Market

Research Division, Overseas Marketing Division, Regional Directorate at Frankfurt as well as reports published by WTM, London and ITB, Berlin.

Primary Research

The primary research was conducted among India Pavilion Co-exhibitors/participants i.e. co-exhibitors/participants in the two fairs in the India pavilion including states/union territories and smaller service providers.

Various divisions of Ministry of Tourism provided year wise list of these co-exhibitors/participants. **However, other contact details such as person who participated, telephone numbers and email etc. were collected by IMRB International by making cold calls in these organizations.**

It was also envisaged, at the proposal and inception report stage that primary survey would also be conducted with **fair visitors** i.e. visitors to the two fairs (especially those by invitation). However, the two events being conducted in the past, inclusion of this segment was subject to availability of list of visitors (with full contact details) with either the co-exhibitors/participants or the Ministry of Tourism itself. In the event, however, a list of fair visitors was found to be unavailable with co-exhibitors/participants as well as Ministry of Tourism.

In order to collect information from the various co-exhibitors/participants in these trade fairs, a web-based survey was used. IMRB International has its in-house web-survey development and analytics division which developed the web-survey format and analysed the results.

The process of web-survey was as follows:

- IMRB International developed a web-based survey format in line with the questionnaire approved by the Ministry during the inception report.
- The prospective respondents, i.e. previous three years co-exhibitors/participants in the fair and fair visitors, were sent a mail with a request to participate in the survey. This mail also had a unique link which took them to the survey web-page. This survey took around 15 minutes to complete.
- Follow up calls were made to these prospective respondents by IMRB team to ensure large participation. In most cases, multiple calls had to be made and reminders had to be sent.

Some of the challenges faced during the above web-survey were as follows:

- In absence of detailed contact details of co-exhibitors/participants in the list provided by Ministry of Tourism, a detailed database had to be prepared by calling the board lines of various organizations (the list of which was provided by the Ministry) and identifying the person(s) who attended the fair(s) and their contact details (email and phone number).
- It has taken multiple follow-ups, over phone, to ensure participation of respondents from the list.

- Many of the co-exhibitors/participants refused to participate in the survey.

Assessment of Impact

In order to assess the impact of participation in world fairs, firstly, the 'impact' itself was defined. This was as below:

Impact of India's participation in WTM (London) and ITB (Berlin) is achievement / non-achievement of laid down objectives of participation in the two fairs.

For e.g. "making an effective, impactful and visible presence of India in these events" is one of the objectives of participation. This was measured in terms of three parameters (as given above):

- Number of people visiting the India pavilion in the fair, to be collected through records maintained by various divisions of Ministry of Tourism (secondary research).
- Proportion of B2B visitors out of the total people visiting the Indian pavilion, to be collected by conducting web-based primary survey among co-exhibitors/participants in India pavilion (primary research).
- Recall of Indian pavilion and specific stalls/booths in it by the visitors after the fair, to be collected by conducting web-based primary survey among visitors to the two fairs and the India pavilion (primary survey).

Therefore, it can be considered that there has been a positive impact of India's participation if:

- Number of people visiting the India pavilion in the fair **increase over the years**
- Proportion of B2B visitors out of the total people visiting the Indian pavilion **increase over the years**
- Recall of Indian pavilion and specific stalls/booths in it by the visitors after the fair **increase over the years**

Therefore, **the first step for impact assessment** was to observe/measure the increase/decrease of various parameters, for each of the objectives of participation.

As an illustration, suppose the values for "number of people visiting the India pavilion in the fair" are as follows:

Number of People Visiting India Pavilion	2011	2012	2013	2014	CAGR At 2014
WTM (London)	2,000	2,100	2,700	2,300	4.8%
ITB (Berlin)	1,000	1,300	1,700	1,500	14.5%

A CAGR i.e. cumulative annual growth rate was calculated from the base year (2011) to the final year (2014). Similar values for CAGR were obtained for other parameters of this objective.

In addition, year-on-year growth for 2012, 2013 and 2014 was also calculated to understand the yearly impact.

Second step for impact assessment was to average these CAGR values for each of the fairs separately for the given objective. *The assumption here was that each parameter / metrics of an objective has an equal weight.* The resultant value was either positive or negative impact on a given objective.

A similar treatment was carried out for all the objectives and their respective parameters.

Third step for impact assessment was assigning weights to various objectives of India's participation in the world fairs. This was done by taking opinion of co-exhibitors/participants on the importance of these objectives. This opinion was taken on a five point scale where 1 meant not-at-all-important and 5 meant highly-important. An aggregation of these rank values provided weights to various objectives.

The **final step for impact assessment** was to take a weighted average of the resultant average CAGR values obtained in second step for each weight. The final values, thus obtained, for each of the world fairs gave the impact score of India's participation in the given world fair.

Note: The current methodology and questionnaires assumed that all the information would be available i.e. has been provided by Ministry of Tourism or by the co-exhibitors/participants during the web-survey. In case information on any parameter(s) was unavailable (for e.g. visitor recall in absence of any visitor database) the same was dropped from the assessment of impact as explained above.

E. Overview of the Two World Fairs

World Travel Market (WTM), London

WTM or World Travel Market is a business-to-business event on global travel industry organized in London (UK). It was launched in London's Olympia in 1982 but moved to Earl's Court in 1992. Since 2002 it is being organized at ExCel London. Reed Exhibitions is the event organizer for WTM.

WTM 2014 was a four day event hosting around 52,000 delegates¹. The number of visitors on first three days were 9,692 (by invitation only), around 20,000 and around 15,000 respectively. During the event industry deals of value around £ 2.5 million were finalized. The event also saw a 7% increase in participation from WTM Buyer's Club, which has around 16,000 members globally.

Internationale Tourismus-Börse (ITB), Berlin

ITB or Internationale Tourismus-Börse is considered to be the world's largest tourism trade fair organized at Berlin each year. The companies participating in the fair include government agencies like tourism boards of various countries, hotels, tour operators, airlines, car rental companies and other tourism / travel service providers. ITB is thematically organized under various sections such as:

- Book World
- Business Travel Days
- Cruises
- Cultural Tourism
- Economy Accommodation
- eTravel World
- Adventure & Responsible Tourism
- Gay & Lesbian Travel
- ITB Mobile Travel Services
- Training and Employment (CareerCenter)
- Travel Technology
- Trends & Events
- Wellness
- Youth Travel

Some facts and figures from ITB events from 2012 to 2014 are as follows²:

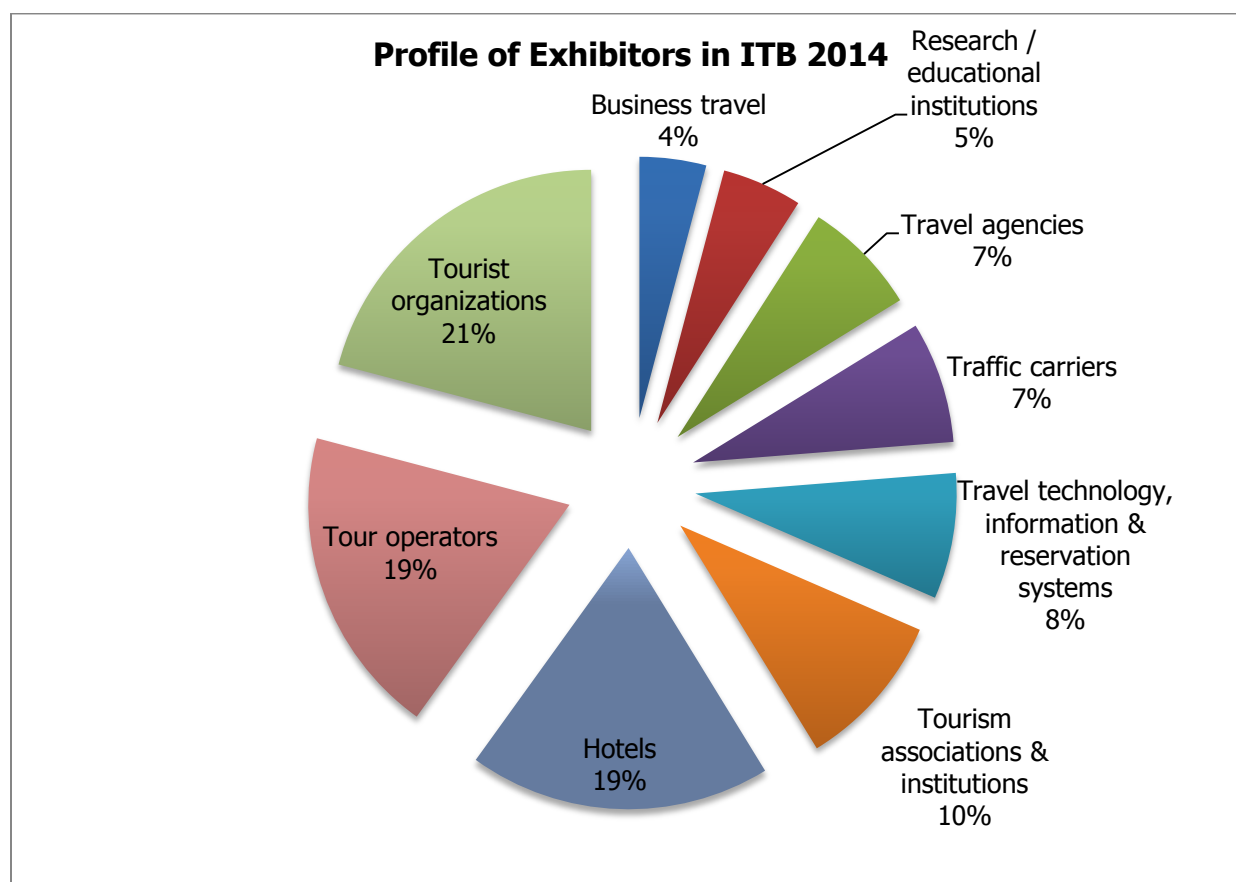
¹ Source: WTM Review 2014

² Source: ITB Berlin Closing Reports for 2012, 2013 and 2014

	2012	2013	2014
Dates	7 – 11 March	6 – 10 March	5 – 9 March
No. of Halls	--	--	26
Countries	187	188	189
Exhibitors	10,644	10,086	10,147
Trade Visitors	~ 113,000	~ 110,000	~ 114,000
Lectures, Discussions & Workshops	--	~ 200	~ 200

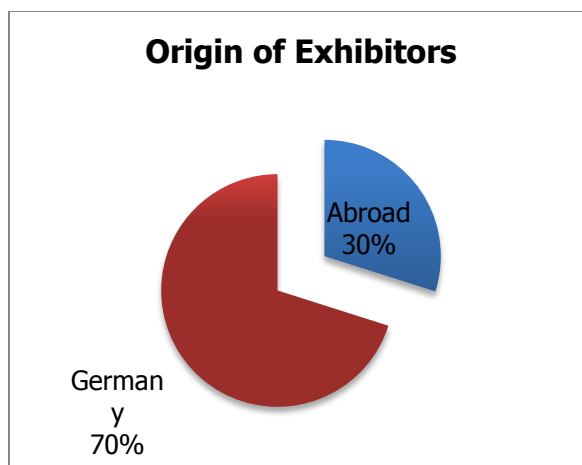
In 2014 ITB organizers conducted a sample survey with exhibitors, trade visitors and private visitors to understand the profile³. The following were the broad results:

Tourist organizations, tour operators and hotels comprised of over 60% of the total exhibitors who participated in the event.

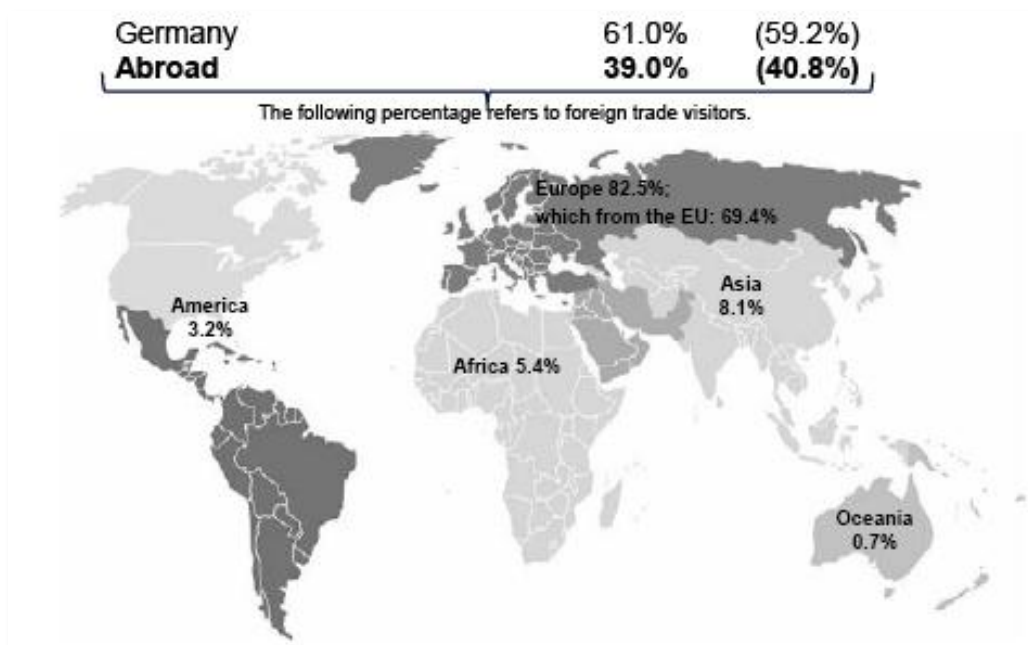


Close to 30% of exhibitors were from outside Germany.

³ Source: Brief Analysis – ITB Berlin 2014

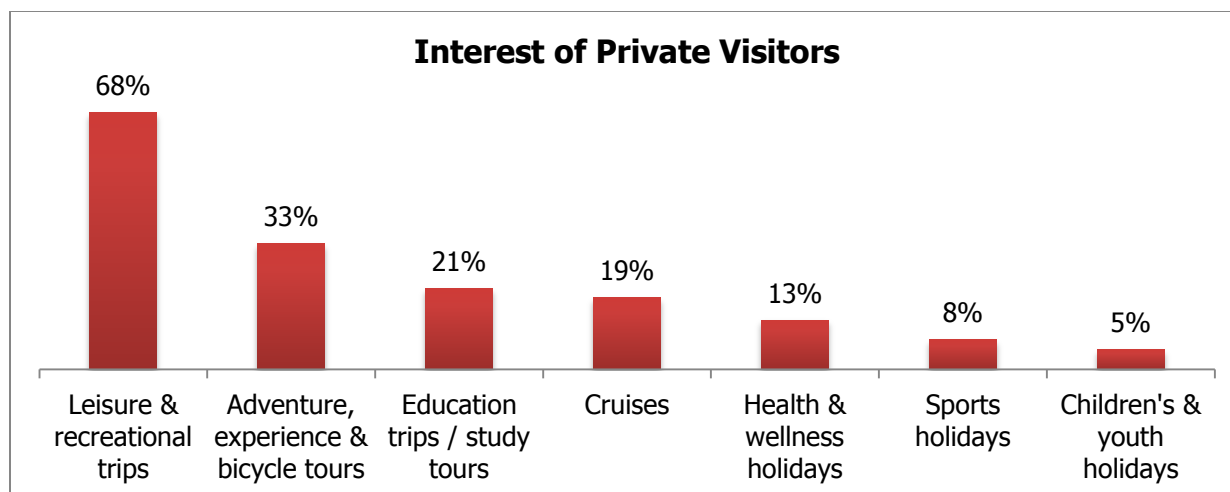


On the other hand, while 61% trade visitors were from Germany itself, rest were from abroad. The chart below shows the origin of trade visitors⁴.



In case of private visitors, 60% were from Berlin itself, 35% from other federal states of Germany and around 4.5% from abroad. The chart below shows the prime interest of these private visitors as mentioned by them during the survey.

⁴ Courtesy: Brief Analysis ITB Berlin 2014



Next two chapters present information regarding India's participation in the two fairs and the impact assessment of its participation.

F. India's Participation at the Two World Fairs

This chapter presents the secondary data regarding India's participation at WTM, London and ITB Berlin during 2011, 2012, 2013 and 2014. This data was provided by following offices / divisions / affiliates of Ministry of Tourism, Government of India.

- Market Research Division, New Delhi (India)
- Overseas Marketing Division, New Delhi (India)
- Regional Directorate, Frankfurt (Berlin)
- India Tourism Office, London (UK)

Participation of Exhibitors

Table below shows the number of exhibitors participating in the two fairs during 2011-14 in the India Pavilion.

World Fair	2011	2012	2013	2014
WTM (London)	50	51	48	47
ITB (Berlin)	73	58	54	52

Participation of States/Union Territories

Table below shows the number of states and union territories participating in the two fairs during 2011-14.

World Fair	2011	2012	2013	2014
WTM (London)	14 States & Union Territories	13 States & Union Territories	11 States & Union Territories	10 States & Union Territories
ITB (Berlin)	5 States & Union Territories	10 States & Union Territories	9 States & Union Territories	5 States & Union Territories

Total area occupied by states / union territories for their booths/stalls in the two fairs over 2011 to 2014 is given in table below.

World Fair	2011	2012	2013	2014
WTM, London	144 Sq. Mt.	214 Sq. Mt.	100 Sq. Mt.	74 Sq. Mt.
ITB, Berlin	92 Sq. Mt.	176 Sq. Mt.	230 Sq. Mt.	40 Sq. Mt.

Support to Small Service Providers

Ministry of Tourism provides support to smaller service providers in terms of offering a fully constructed booth within India Pavilion at subsidized rates. Total area thus provided under subsidy is detailed in the table below:

World Fair	2011	2012	2013	2014
WTM, London	204 Sq. Mt.	168 Sq. Mt.	124 Sq. Mt.	160 Sq. Mt.
ITB, Berlin	870 Sq. Mt.	870 Sq. Mt.	870 Sq. Mt.	698 Sq. Mt.

Organization of Various Events

Various events such as happy hours, breakfast meetings, cocktail events, India evenings are organized during the course of two world fairs. Information regarding number of such events organized, investment done and number of co-exhibitors/participants who took part in these events for WTM, London is summarized in the table below.

WTM London		2011	2012	2013	2014
Happy Hours	Events	Not Held	Not Held	2	2
	Investment	Not Held	Not Held	Rs. 8.00 Lacs	Rs. 9.00 Lacs
	Attendees ⁵	Not Held	Not Held	750	850
Breakfast Meetings	Events	1	1	Not Held	Not Held
	Investment	Rs. 2.50 Lacs	Rs. 3.50 Lacs	Not Held	Not Held
	Attendees	31	35	Not Held	Not Held
Cocktail Events	Events	Not Held	Not Held	Not Held	Not Held
	Investment	Not Held	Not Held	Not Held	Not Held
	Attendees	Not Held	Not Held	Not Held	Not Held
India Evenings	Events	1	1	Not Held	Not Held
	Investment	Rs. 38.00 Lacs	Rs. 41.00 Lacs	Not Held	Not Held
	Attendees	550	600	Not Held	Not Held
All Events	Events	2	2	2	2
	Investment	Rs. 40.50 Lacs	Rs. 44.50 Lacs	Rs. 8.00 Lacs	Rs. 9.00 Lacs
	Attendees	581	635	750	850

Information regarding ITB, Berlin is given below:

ITB Berlin		2011	2012	2013	2014
Happy Hours	Events	1	Not Held	1	2
	Investment	Rs. 2.02 Lacs	Not Held	RS. 2.59 Lacs	RS. 7.06 Lacs
	Attendees	250	Not Held	350	700
Breakfast Meetings	Events	1	1	1	1
	Investment	Rs. 1.80 Lacs	RS. 4.85 Lacs	RS. 2.45 Lacs	RS. 3.30 Lacs
	Attendees	40	Open Event	34	39
Cocktail Events	Events	Not Held	Not Held	1	Not Held
	Investment	Not Held	Not Held	RS. 38.85 Lacs	Not Held

⁵ Attendees refer to co-exhibitors/participants/participants who attended a particular event.

ITB Berlin		2011	2012	2013	2014
India Evenings	Attendees	Not Held	Not Held	145	Not Held
	Events	1	1	Not Held	Not Held
	Investment	Rs. 32.62 Lacs	RS. 45.36 Lacs	Not Held	Not Held
	Attendees	300	350	Not Held	Not Held
All Events	Events	3	2	3	3
	Investment	Rs. 36.44 Lacs	Rs. 50.21 Lacs	Rs. 43.89 Lacs	Rs. 10.36 Lacs
	Attendees	550	350	529	739

Number of Visitors to India Pavilion

Table below shows the total number of visitors to India Pavilion in the two fairs over 2011 to 2014. No records of total visitors entering India Pavilion have been maintained for ITB, Berlin, as this is an open event.

World Fair	2011	2012	2013	2014
WTM, London	1,500	1,450	1,550	1,600
ITB, Berlin	Being an open event the record cannot be maintained.			

G. Findings from Co-Exhibitor Survey

A web/online survey was conducted with co-exhibitors/participants in WTM, London and ITB, Berlin (over 2011 to 2014) during the months of March to July 2015. This chapter presents findings from this web/online survey. It also analyses India's achievement on its objectives of participation.

Importance & Achievement of Objectives of Participation

Ministry of Tourism has some specific objectives of participating and setting up of India Pavilion in the two fairs. These are listed below. This section examines the importance of various objectives in the opinion of co-exhibitors/participants as well as achievement on these objectives, again, in their perception.

Objective No	Detailed Objective
Objective 1	Making an effective, impactful and visible presence of India in these events.
Objective 2	Interacting with government officials and organizing business-to-business (B2B) meetings.
Objective 3	Facilitating stake holders to showcase their products and generate business through business-to-business (B2B) meetings with the international trade who participates in these events in large numbers.
Objective 4	Facilitating states and/or union territories of India to showcase their tourism destinations and products.
Objective 5	Offering a platform to interact with foreign buyers and organizing occasions like happy hours, breakfast meetings, cocktail events, and India Evenings during the above mentioned events.
Objective 6	Supporting the smaller service providers by way of offering a fully constructed booth within the India Pavilion at subsidized rates.

In order to evaluate the importance of these objectives for co-exhibitors/participants as well as the achievement of India Pavilion in their perception, two questions were asked. These were as follows:

1. How important is the objective to co-exhibitors/participants? To be rated on a five point scale as below.

Not At All important	Unimportant	Neither Important Nor Unimportant	Important	Very Important
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2. As per them, what has been India Pavilion's achievement on these? To be rated on a three point scale as below.

Not at all achieved	Partially achieved	Fully achieved
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The table below shows the percentage of respondents who chose a particular importance point on the answering scale. It also shows the importance score (out of 5) for each of the objectives.

Objective	Not At All Important	Unimportant	Neither Important Nor Unimportant	Important	Very Important	Final Score (Out of 5)	Rank
Objective 1	0%	0%	6%	31%	64%	4.57	I
Objective 2	3%	0%	8%	31%	58%	4.41	II
Objective 3	6%	0%	14%	14%	67%	4.35	III
Objective 4	8%	3%	11%	42%	36%	3.95	V
Objective 5	3%	6%	22%	33%	36%	3.93	VI
Objective 6	8%	0%	11%	19%	61%	4.26	IV

Similarly, the table below shows the percentage of respondents who chose a particular achievement point on the answering scale along with the achievement score (out of 3) for each of the objectives.

Objective	Not at all Achieved	Partially Achieved	Fully Achieved	Final Score (Out of 3)	Rank
Objective 1	17%	75%	8%	1.91	III
Objective 2	19%	75%	6%	1.87	IV
Objective 3	31%	61%	8%	1.77	VI
Objective 4	22%	75%	3%	1.81	V
Objective 5	19%	69%	11%	1.92	II
Objective 6	28%	47%	25%	1.97	I

Therefore, this table below summarizes the absolute⁶ level of importance and achievement for each of these objectives.

Objective	Importance	Achievement
Making an effective, impactful and visible presence of India in these events.	Very High	Medium
Interacting with government officials and organizing business-to-business (B2B) meetings.	Very High	Medium
Facilitating stake holders to showcase their products and generate business through business-to-business (B2B) meetings with the international trade who participates in	Very High	Medium

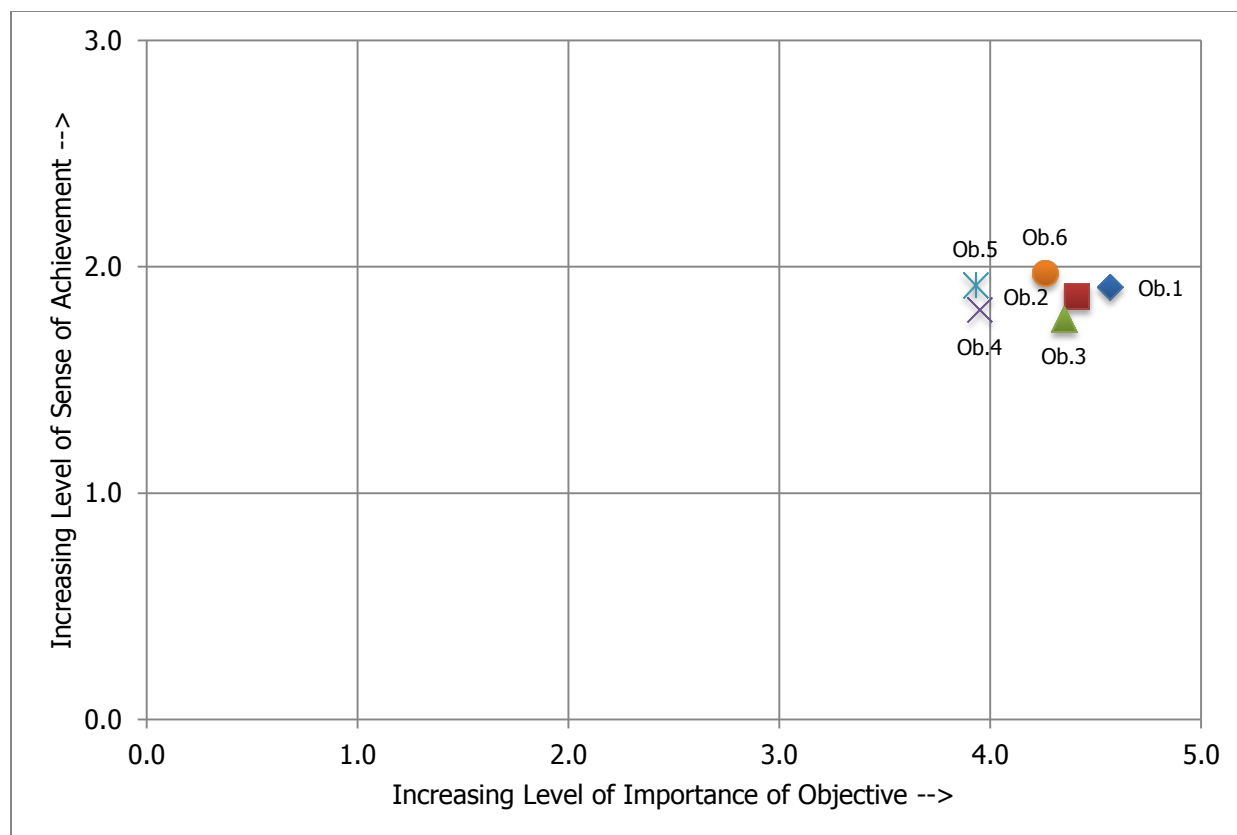
⁶ Absolute level of importance and achievement means individual scores on a scale of 5 (in case of importance) and on a scale of 3 (in case of achievement). Thus, for absolute importance, a score of 0-1 means very low, 1-2 means low, 2-3 means neither low nor high, 3-4 means high and 4-5 means very high. Similarly, for absolute achievement, 0-1 means low, 1-2 means medium and 2-3 means high.

Objective	Importance	Achievement
these events in large numbers.		
Facilitating states and/or union territories of India to showcase their tourism destinations and products.	High	Medium
Offering a platform to interact with foreign buyers and organizing occasions like happy hours, breakfast meetings, cocktail events, and India Evenings during the above mentioned events.	High	Medium
Supporting the smaller service providers by way of offering a fully constructed booth within the India Pavilion at subsidized rates.	Very High	High

While all the objectives have a high or a very high importance, the level of achievement is considered to medium for all but one objective. This is as per the perception of co-exhibitors/participants.

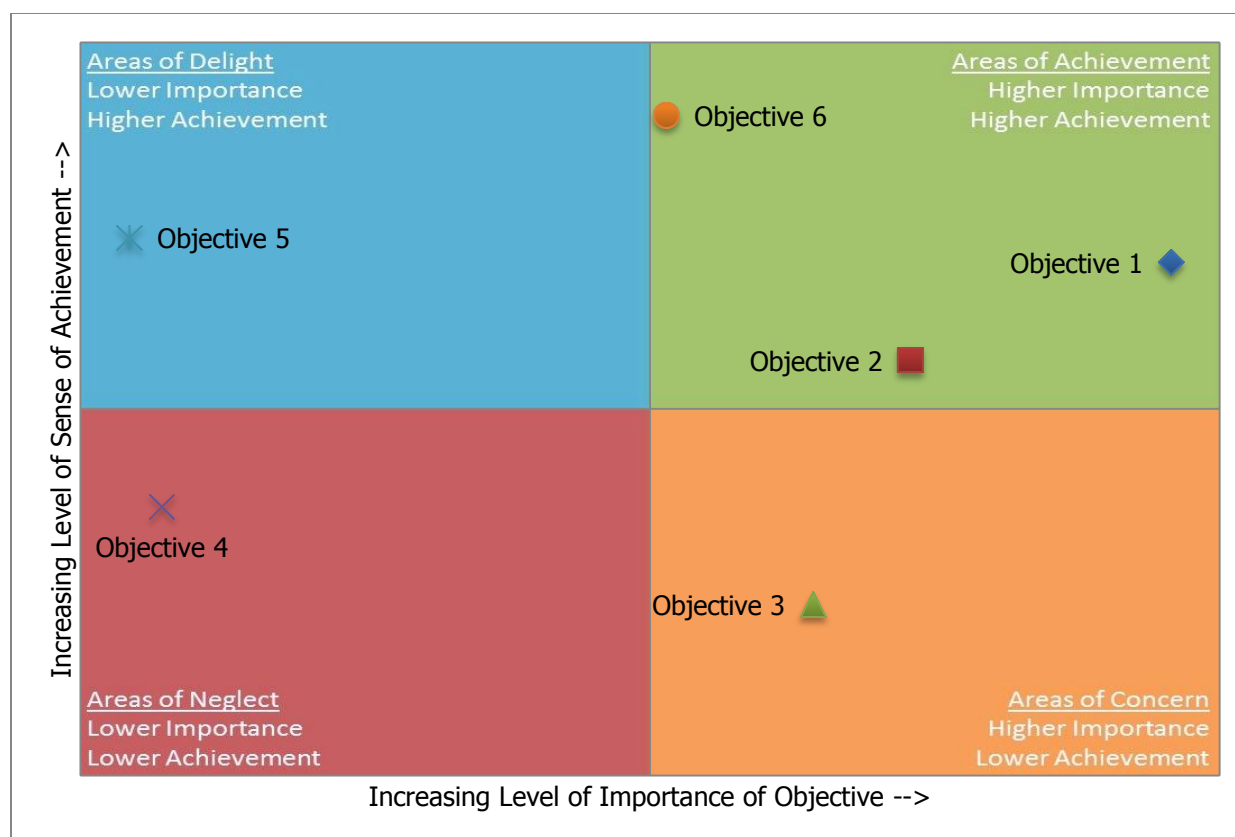
If the absolute scores of achievement are plotted on a scatter plot⁷, most of the objectives fall towards the top right corner of the chart i.e. having high/very high importance and medium/high achievement.

⁷ The horizontal axis of the chart represents the increasing level of importance, in view of co-exhibitors/participants, for various objectives. The vertical axis of the chart represents the increasing level of achievement, in co-exhibitors/participants' perception, of each of these objectives over the last four years of participation in WTM, London and ITB, Berlin.



However, to understand the relative⁸ importance and achievement of these objectives, these have to be plotted on a magnified chart (as below).

⁸ In case of relative importance/achievement, a particular objective may be said to be higher or lower only in relation to any other objective. As seen earlier, all objectives may have a high importance and achievement on an absolute level.



The chart above is divided into four grids as follows⁹:

Grid Name	Level of Importance	Level of Achievement
Area of Neglect	Low	Low
Area of Concern	High	Low
Area of Delight	Low	High
Area of Achievement	High	High

In the view of co-exhibitors/participants, three objectives of India's participation in WTM, London and ITB, Berlin have relatively high importance. These include:

- Making an effective, impactful and visible presence of India in these events.
- Interacting with government officials and organizing business-to-business (B2B) meetings.
- Facilitating stake holders to showcase their products and generate business through business-to-business (B2B) meetings with the international trade who participates in these events in large numbers.

⁹ Note: These are relative positions only and not absolute. For e.g. one objective may have a better importance and achievement (or vice versa) only as compared to other objectives.

As per co-exhibitors/participants, India has been able to achieve the former two (i.e. making an effective, impactful and visible presence of India in these events and interacting with government officials and organizing business-to-business (B2B) meetings) highly.

However, there is a marginal sense of achievement in facilitating stake holders to showcase their products and generate business through business-to-business (B2B) meetings with the international trade who participates in these events in large numbers.

The following two objectives of India's participation are considered to be a delight factor i.e. have a low level of importance but relatively have posted high achievement:

- Offering a platform to interact with foreign buyers and organizing occasions like happy hours, breakfast meetings, cocktail events, and India Evenings during the above mentioned events.
- Supporting the smaller service providers by way of offering a fully constructed booth within the India Pavilion at subsidized rates.

Facilitating states and/or union territories of India to showcase their tourism destinations and products is neither an important consideration for co-exhibitors/participants nor they feel there has been an achievement in that.

Achievement of Objectives of Participation

This section discusses the achievements of various objectives of India's participation in the two world fairs based on some key metrics.

Achievement of Objective 1

Objective: Making an effective, impactful and visible presence of India in these events.

The achievement of this objective was measured on two indices. These included:

- Number of total visitors to India pavilion, and,
- Proportion of B2B visitors among these.

World Fair	Visitor Type	2011	2012	2013	2014
WTM, London	Total	1,500	1,450	1,550	1,600
	B2B	35%	41%	46%	58%
ITB, Berlin	Total	NA ¹⁰	NA	NA	NA
	B2B	38%	37%	38%	38%

The growth rates, year on year and CAGR (for 2014 over 2011) are given in table below:

¹⁰ ITB, Berlin being an open event - the total number of visitors cannot be estimated.

World Fair	Visitor Type	2011-2012	2012-2013	2013-2014	CAGR
WTM, London	Total	-3.33%	6.90%	3.23%	2.17%
	B2B	17.14%	12.20%	26.09%	18.34%
ITB, Berlin	Total	---	---	---	---
	B2B	-2.63%	2.70%	0.00%	0.00%

For WTM, London, the influx of visitors to India pavilion has been rather constant and has hovered around 1,500 per year. The growth rate (in CAGR) terms is around 2%. On the other hand proportion of B2B visitors, as per co-exhibitors/participants survey, has been around 18.34%.

While for ITB, the influx of visitors to India pavilion has not been recorded, due to the open entry nature of the event, the proportion of B2B visitors over the years has been constant and has hovered around 38%.

Achievement of Objective 2

Objective: Interacting with government officials and organizing business-to-business (B2B) meetings.

Assessment of achievement of this objective is done using two variables collected by conducting primary survey among co-exhibitors/participants. These are:

- Percentage of those co-exhibitors/participants (out of total) who participated in any and all types of meetings organized by Ministry of Tourism.
- Percentage of those co-exhibitors/participants (out of total) who participated in B2B meetings organized by Ministry of Tourism.

World Fair	Type of Meeting	2011	2012	2013	2014
WTM, London	All Meetings	35%	40%	50%	50%
	B2B Meetings	41%	53%	50%	50%
ITB, Berlin	All Meetings	38%	38%	31%	36%
	B2B Meetings	50%	46%	45%	50%

Source: Primary research

The growth rates, year on year and CAGR (for 2014 over 2011) are given in table below:

World Fair	Type of Meeting	2011-2012	2012-2013	2013-2014	CAGR
WTM, London	All Meetings	14.29%	25.00%	0.00%	12.62%
	B2B Meetings	29.27%	-5.66%	0.00%	6.84%
ITB, Berlin	All Meetings	0.00%	-18.42%	16.13%	-1.79%
	B2B Meetings	-8.00%	-2.17%	11.11%	0.00%

For WTM London, increasing number of co-exhibitors/participants are finding utility in participating in meetings (esp. B2B types). There has been a growth of more than 12% in the percentage of those co-exhibitors/participants (out of total) who participated in any and all types of meetings organized by Ministry of Tourism. However, this has rather stabilized during the last two years of participation. The growth in percentage of co-exhibitors/participants (out of total) who participated in B2B meetings organized by Ministry of Tourism is close to 7%.

For ITB, while there is a de-growth in the former, the latter is largely consistent over the years..

Achievement of Objective 3

Objective: Facilitating stake holders to showcase their products and generate business through business-to-business (B2B) meetings with the international trade who participates in these events in large numbers.

Achievement of this objective is based on average value of orders booked / deals made by co-exhibitors/participants while participating in each of these events. This information has been collected during primary research among co-exhibitors/participants.

World Fair	2011	2012	2014	2014
WTM, London	191.75 Lacs	372.42 Lacs	182.86 Lacs	17.00 Lacs
ITB, Berlin	172.83 Lacs	169.85 Lacs	242.29 Lacs	74.50 Lacs

Source: Primary research

The growth rates, year on year and CAGR (for 2014 over 2011) are given in table below:

World Fair	2011-2012	2012-2013	2013-2014	CAGR
WTM, London	94.22%	-50.90%	-90.70%	-55.41%
ITB, Berlin	-1.72%	42.65%	-69.25%	-24.46%

As per the figures reported by co-exhibitors/participants during the survey, the orders being booked per year has a fluctuating nature. There is de-growth (in a CAGR) basis of around 50% in WTM, London and around 25% in ITB, Berlin.

Achievement of Objective 4

Objective: Facilitating states and/or union territories (UTs) of India to showcase their tourism destinations and products.

This is based on a single information area – growth in area of booth per state/UT area (in square metres). This is based on two information areas provided by Ministry of Tourism, viz. number of states/UTs participating and total area of booths occupied by these states/UTs

World Fair	Type of Meeting	2011	2012	2013	2014
WTM, London	No of States /UT	14	13	11	10
	Total Area (Sq. Mt.)	144	214	100	40
	Per State/UT Area (Sq. Mt.)	10.29	16.46	9.09	4.00
ITB, Berlin	No of States /UT	5	10	9	5
	Total Area (Sq. Mt.)	92	176	230	40
	Per State/UT Area (Sq. Mt.)	18.40	17.60	25.56	8.00

Source: Secondary research

The growth rates, year on year and CAGR (for 2014 over 2011) are given in table below:

World Fair	2011-2012	2012-2013	2013-2014	CAGR
WTM, London	59.96%	-44.78%	-56.00%	-27.01%
ITB, Berlin	-4.35%	45.23%	-68.70%	-24.24%

As per the information provided by India Offices in London and Berlin, there has been a decline (over 2011 to 2014) for the per-state/UT area of booths/stalls. For WTM, the decline is around 27% while that for ITB is around 24%. However, a drastic fluctuation is seen on a year-on-year basis for both the fairs.

Achievement of Objective 5

Objective: Offering a platform to interact with foreign buyers and organizing occasions like happy hours, breakfast meetings, cocktail events, and India Evenings during the above mentioned events.

Achievement of this objective is evaluated on three criteria. These are total number of events like happy hours, breakfast meetings, cocktail events, India evenings etc. organized, total expenses made in organizing these and percentage of co-exhibitors/participants participating in the event (which is a measure of how relevant or attractive this objective is for them).

While the first two information points is obtained from Ministry of Tourism, the third point is obtained through primary survey.

World Fair	Information	2011	2012	2013	2014
WTM, London	Total Events	2	2	2	2
	Total Expenses (Rs. Lacs)	40.50	44.50	8.00	9.00
	Percentage of Co-exhibitors/participants Participating	63%	57%	57%	50%
ITB, Berlin	Total Events	3	2	3	3
	Total Expenses (Rs. Lacs)	36.44	50.21	43.89	10.36
	Percentage of Co-exhibitors/participants Participating	58%	58%	54%	49%

Source: Primary & secondary research

The growth rates, year on year and CAGR (for 2014 over 2011) are given in table below:

World Fair	Information	2011-2012	2012-2013	2013-2014	CAGR
WTM, London	Total Events	0.00%	0.00%	0.00%	0.00%
	Total Expenses (Rs. Lacs)	9.88%	-82.02%	12.50%	-39.43%
	Percentage of Co-exhibitors/participants Participating	-9.52%	0.00%	-12.28%	-7.41%
ITB, Berlin	Total Events	-33.33%	50.00%	0.00%	0.00%
	Total Expenses (Rs. Lacs)	37.79%	-12.59%	-76.40%	-34.25%
	Percentage of Co-exhibitors/participants Participating	0.00%	-6.90%	-9.26%	-5.47%

Over the years, i.e. since 2011 and to 2014, there has been a decline in not only the percentage of co-exhibitors/participants participating in various events (such as happy hours, breakfast meetings, cocktail events, India evenings etc.) but also the expenses incurred by Ministry of Tourism towards organizing these events. For e.g. for WTM, the total expenses for organizing such events has gone down from INR 40 Lacs in 2011 to INR 9 Lacs in 2014, the percentage of co-exhibitors/participants attending these events has declined from close to two-thirds to half. The story for ITB is not too different. Also, a fluctuation in values is seen on a year-on-year basis for both the fairs.

Achievement of Objective 6

Objective: Supporting the smaller service providers by way of offering a fully constructed booth within the India Pavilion at subsidized rates.

Achievement of this objective is evaluated on a single criterion – total booth space allotted to smaller service providers. Table below summarizes the information provided by Ministry of Tourism.

World Fair	2011	2012	2013	2014
WTM, London	204 Sq. Mt.	168 Sq. Mt.	124 Sq. Mt.	160 Sq. Mt.
ITB, Berlin	870 Sq. Mt.	870 Sq. Mt.	870 Sq. Mt.	698 Sq. Mt.

Source: Secondary research

The growth rates, year on year and CAGR (for 2014 over 2011) are given in table below:

World Fair	2011-2012	2012-2013	2013-2014	CAGR
WTM, London	-17.65%	-26.19%	29.03%	-7.78%
ITB, Berlin	0.00%	0.00%	-19.77%	-7.08%

Since 2011, total area allotted to small service providers has decreased by around 7-8% for both ITB and WTM. While for WTM, there has been some year-on-year fluctuation, for ITB it has largely been consistent except for 2014.

Impact of India's Participation in World Fairs

Impact or achievement of India's objectives of participation in the two world fairs i.e. WTM, London and ITB, Berlin are measured with 2011 as the base year. That is the study measures whether India's participation in the last three years i.e. 2012, 2013 and 2014 has achieved its objective in a better or a worse way than 2011. To measure this, the methodology given in chapter B is used. This is shown below:

In order to calculate the average score for each objective the score in percentage was standardized on a scale of 5 using below formula:

$$\text{Average Score} = \frac{\sum (\text{Percentage Score for a Scale} \times \text{Point for the Scale})}{100\%}$$

Weight for each objective would be calculated as follows:

$$\text{Weight} = \frac{\text{Average Score for the Objective}}{\sum \text{Average Scores for All Objectives}}$$

The results are shown in table below:

Objective	Not At All Important	Unimportant	Neither Important Nor Unimportant	Important	Very Important	Average Score	Weight
Point:	1	2	3	4	5	---	---
Objective 1	0%	0%	6%	31%	64%	4.57	17.96%
Objective 2	3%	0%	8%	31%	58%	4.41	17.31%
Objective 3	6%	0%	14%	14%	67%	4.35	17.06%
Objective 4	8%	3%	11%	42%	36%	3.95	15.51%
Objective 5	3%	6%	22%	33%	36%	3.93	15.43%
Objective 6	8%	0%	11%	19%	61%	4.26	16.73%
Total						25.47	100%

Using the above calculation, the year on year objective achievement (+/-) and overall objective achievement (+/-) over 2011-2014 is shown in table on next page.

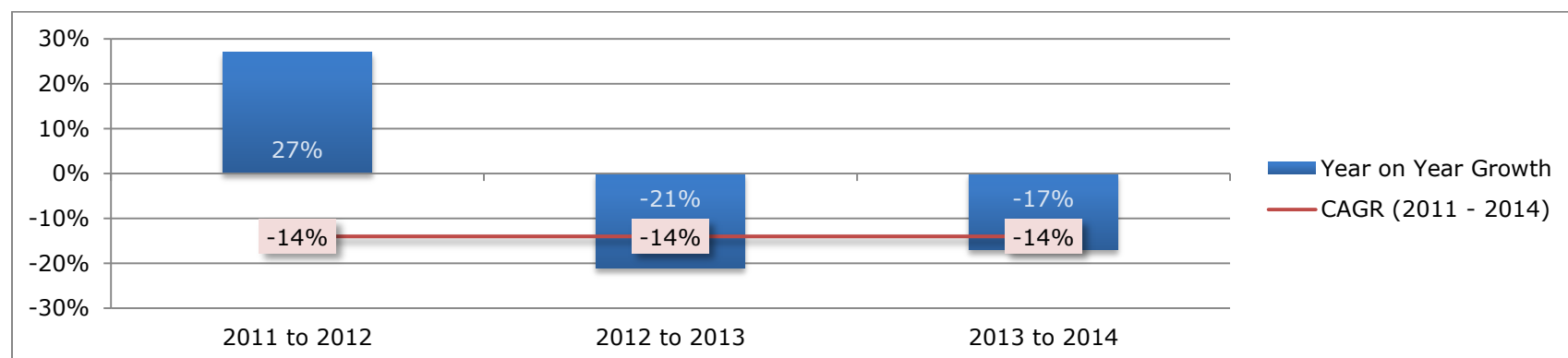
In order to calculate the overall objective growth rates, a simple average of the individual metrics growth rate for that objective has been taken. The underlying assumption here is that individual metrics for each objective have the same weight.

Output table 1: Impact of India's participation in WTM, London

Objective	Weightage	Metrics	Individual Metrics Growth Rate				Overall Objective Growth Rates			
			2011-12	2012-13	2013-14	2011-14	2011-12	2012-13	2013-14	2011-14
Objective 1	17.96%	Total visitors	-3%	7%	3%	2%	7%	10%	15%	10%
		B2B Visitors	17%	12%	26%	18%				
Objective 2	17.31%	Meeting participation (all)	14%	25%	0%	13%	22%	10%	0%	10%
		Meeting participation (B2B)	29%	-6%	0%	7%				
Objective 3	17.06%	Orders booked	94%	-51%	-91%	-55%	94%	-51%	-91%	-55%
Objective 4	15.51%	Per state/UT booth area	60%	-45%	-56%	-27%	60%	-45%	-56%	-27%
Objective 5	15.43%	Total events	0%	0%	0%	0%	0%	-27%	0%	-15%
		Total expenses	10%	-82%	13%	-39%				
		% co-exhibitors/participants participating	-10%	0%	-12%	-7%				
Objective 6	16.73%	Total booth space	-18%	-26%	29%	-8%	-18%	-26%	29%	-8%
Total	100.00%	---	---	---	---	---	27%	-21%	-17%	-14%

Source: Data analysis

Chart below shows the achievement of objectives for WTM, London on a year on year (in bars) basis and over the period 2011-2014 (in line):

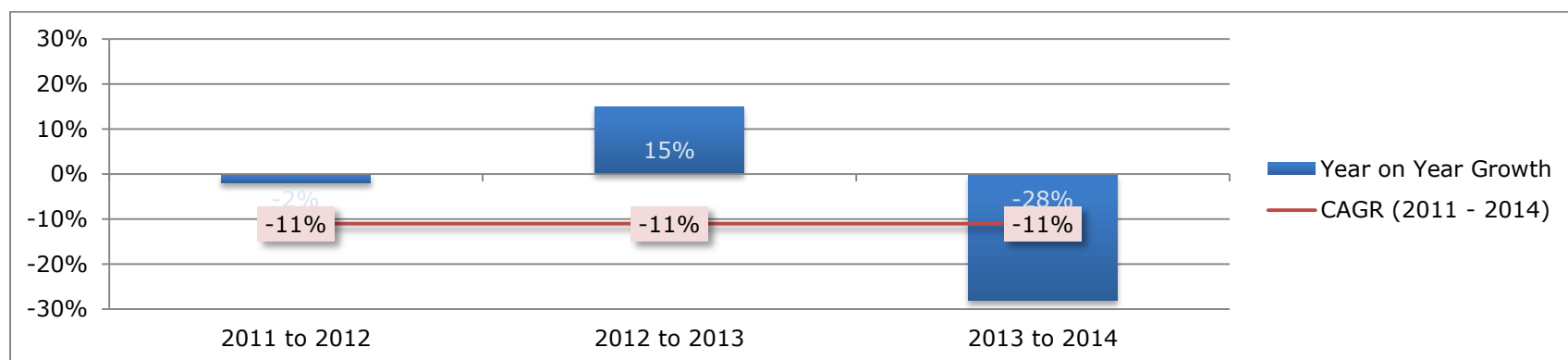


Output table 2: Impact of India's participation in ITB, Berlin

Objective	Weightage	Metrics	Individual Metrics Growth Rate				Overall Objective Growth Rates			
			2011-12	2012-13	2013-14	2011-14	2011-12	2012-13	2013-14	2011-14
Objective 1	17.96%	Total visitors	---	---	---	---	-3%	3%	0%	0%
		B2B Visitors	-3%	3%	0%	0%				
Objective 2	17.31%	Meeting participation (all)	0%	-18%	16%	-2%	-4%	-10%	14%	-1%
		Meeting participation (B2B)	-8%	-2%	11%	0%				
Objective 3	17.06%	Orders booked	-2%	43%	-69%	-24%	-2%	43%	-69%	-24%
Objective 4	15.51%	Per state/UT booth area	-4%	45%	-69%	-24%	-4%	45%	-69%	-24%
Objective 5	15.43%	Total events	-33%	50%	0%	0%	1%	10%	-29%	-13%
		Total expenses	38%	-13%	-76%	-34%				
		% co-exhibitors/participants participating	0%	-7%	-9%	-5%				
Objective 6	16.73%	Total booth space	0%	0%	-20%	-7%	0%	0%	-20%	-7%
Total	100.00%	---	---	---	---	---	-2%	15%	-28%	-11%

Source: Data analysis

Chart below shows the achievement of objectives for WTM, London on a year on year (in bars) basis and over the period 2011-2014 (in line):



When all the indices are analysed together, it was found that there has been lesser achievement over the last three years as compared to 2011 for both the fairs. In WTM, London the decrease in achievement is around 14%% while for ITB, Berlin is around 11%.

On a year-on-year basis, achievement in WTM London was around 27% more in 2012 as compared to 2011. However, for the next two years there has been a decline in the achievement as compared to the immediate previous years.

During these three years, following was the visitor attendance in WTM, London.

<i>Statistics</i>	<i>2011</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>
<i>Visitors</i>	<i>28,155</i>	<i>29,000</i>	<i>78,035</i>	<i>82,213</i>

Over 2011, the visitors have seen a rise of 43% on a CAGR basis. This is a huge achievement over the years. Clearly, Indian pavilion falls short of this benchmark and needs to step up its performance.

For ITB Berlin, there was a minor decrease in achievement during 2012 as compared to 2011. However, in 2013, there was a 15% increase in achievement of objectives over 2012. Then again in 2014, there was an almost 28% reduction in achievement.

During these three years, the overall performance of ITB was largely constant – in terms of countries & exhibitors participating and trade visitors attending the mart. This is summarized in the table below.

<i>Statistics</i>	<i>2012</i>	<i>2013</i>	<i>2014</i>
<i>Countries</i>	<i>187</i>	<i>188</i>	<i>189</i>
<i>Exhibitors</i>	<i>10,644</i>	<i>10,086</i>	<i>10,147</i>
<i>Trade Visitors</i>	<i>~ 113,000</i>	<i>~ 110,000</i>	<i>~ 114,000</i>

Given the above, improvement is needed in India's performance in International Tourism Bourse.

H. Annexure: List of Co-exhibitors/participants

Co-exhibitors/participants in India Pavilion in ITB, Berlin & WTM, London¹¹

No	Co-Exhibitor (In Alphabetical Order)	2012	2013	2014
1	Air India	Yes	Yes	Yes
2	Ambassador Holidays India Pvt. Ltd.	Yes	Yes	Yes
3	Andaman & Nicobar Administration	Yes		
4	Andhra Pradesh Tourism	Yes	Yes	
5	Arunachal Tourism			Yes
6	Asia Travel & Tours		Yes	Yes
7	Atithi Voyages			Yes
8	AVM Travel Designers Private Limited			Yes
9	Bespoke Tours (Division of Travel Tracks Pvt. Ltd.)		Yes	
10	Carlson Rezidor			Yes
11	Chalykya Grace Tours Pvt. Ltd.		Yes	
12	Chhattisgarh Tourism	Yes	Yes	Yes
13	Citrus Hotels & Resorts	Yes	Yes	Yes
14	Clarks Group of Hotels	Yes	Yes	
15	Delhi Tourism	Yes		
16	Destination Unlimited			Yes
17	Discover India Tours	Yes		
18	Eastbound	Yes		
19	Equinox	Yes	Yes	Yes
20	Erco Travels Pvt. Ltd.	Yes	Yes	Yes
21	Asia Resort Ltd. / Mokshaya Himalaya Spa Resort	Yes		
22	Fort Rajwada	Yes	Yes	
23	Forvol Tours & Travel / Forvol International Services		Yes	Yes
24	Daman & Diu, Dadra & Nagar Haveli Administration	Yes	Yes	
25	Grand Hyatt, Goa		Yes	
26	Grand India Travel Advisors (GITA) Pvt. Ltd.		Yes	Yes
27	Grande Tours & Travels			Yes
28	GRT Hotels & Resorts	Yes	Yes	Yes
29	Haryana Tourism	Yes		
30	Himachal Tourism			Yes
31	Himalayan Eco Adventures	Yes		
32	Holidays by Rail (The Travel Tree)			Yes
33	IDMS Tours Pvt. Ltd.			Yes
34	Impression Tourism Services Pvt. Ltd.	Yes		
35	Incredible Destination Management Services Pvt. Ltd.	Yes	Yes	

¹¹ As per the list provided by India Office, Berlin

No	Co-Exhibitor (In Alphabetical Order)	2012	2013	2014
36	Incredible Voyages Pvt. Ltd.	Yes	Yes	Yes
37	India Exotica Travels Pvt. Ltd.		Yes	Yes
38	Inpac Tours Pvt. Ltd.	Yes	Yes	
39	Interactive Tours to India Pvt. Ltd.	Yes		
40	IORA - The Retreat	Yes		
41	IRCTC	Yes		Yes
42	ITDC		Yes	Yes
43	Jatak Travels		Yes	
44	Jayasree Travels & Tour Company	Yes		
45	Jungle Travels India Pvt. Ltd.			Yes
46	Kadappuram Beach Resort	Yes	Yes	Yes
47	Kerala Travels Interserve	Yes		
48	Kerala Voyages India Pvt. Ltd.	Yes	Yes	Yes
49	Kesari Tours Pvt. Ltd.	Yes	Yes	
50	Kingdom of Dreams			Yes
51	Koyeli Tours & Travels			Yes
52	Labana World Travels Pvt. Ltd.	Yes		
53	Madhya Pradesh Tourism	Yes	Yes	Yes
54	Maharashtra Tourism	Yes	Yes	
55	Mist & Mountains	Yes		
56	Namaste Tours Pvt. Ltd.	Yes	Yes	Yes
57	Net Work Travels			Yes
58	Nirvana Voyages Pvt. Ltd.		Yes	Yes
59	Paradise Resort (Thanjavur, Kumbakonam)	Yes		
60	Park Hyatt Goa Resort & Spa	Yes	Yes	
61	Pioneer Personalized Holidays Pvt. Ltd.	Yes	Yes	Yes
62	PML Holidays / Paul Merchants	Yes	Yes	
63	The Raj Palace		Yes	Yes
64	Ramoji Film City		Yes	
65	Razdan Holidays	Yes	Yes	Yes
66	Royal Indian Voyages Pvt. Ltd.	Yes	Yes	
67	SA Southend Travels Pvt. Ltd.			Yes
68	Sanskriti Tours Pvt. Ltd.			Yes
69	Sarovar Hotels & Resorts		Yes	
70	Scenic Journeys Pvt. Ltd.	Yes	Yes	Yes
71	Seasons & Vacations			Yes
72	Sen Kay Tours & Travels Pvt. Ltd.		Yes	Yes
73	Sikkim Tourism	Yes	Yes	Yes
74	Skyway Tour (Skyway International Travels)	Yes	Yes	Yes
75	Snowlion Expeditions Pvt. Ltd.	Yes	Yes	Yes
76	Surya Reisedienst Pvt. Ltd.	Yes	Yes	Yes
77	Swagatam Tours Pvt. Ltd.			Yes

No	Co-Exhibitor (In Alphabetical Order)	2012	2013	2014
78	Tamil Nadu Tourism	Yes	Yes	
79	The Grand Hyatt Plaza	Yes		
80	The Great India Tour Company Pvt. Ltd.	Yes		
81	The Luxury Trains / The Luxury Holidays	Yes	Yes	Yes
82	The Zuri White Sands Resorts, Goa	Yes	Yes	Yes
83	Top Travel & Tours Pvt. Ltd.	Yes	Yes	Yes
84	Travel XS Pvt. Ltd.			Yes
85	U.P. Hotels Ltd.			Yes
86	Vacations Travels & Tours Pvt. Ltd.	Yes	Yes	Yes
87	Varun Voyages	Yes		
88	Vedic Resorts & Hotels (Vedic Village)	Yes		Yes
89	Vedic Tours & Travels	Yes		
90	Welcome Travel	Yes		
91	West Bengal Tourism		Yes	
92	Yes Bank		Yes	

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