

Motivational Factors of visiting India – A study based on International Passenger Survey, 2009-10

Study Commissioned by the
Ministry of Tourism, Government of India

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ABBREVIATIONS AND ACRONYMS

DTS	Domestic Tourism Survey
IPS	International Passenger Survey
ISI	Indian Statistical Institute
NCAER	National Council of Applied Economic Research
NRI	Non-Resident Indian
NSSO	National Sample Survey Office
PIO	Persons of Indian Origin
TSA	Tourism Satellite Account

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1. INTRODUCTION

Context of the study

1.1 *“Crompton (1979) notes it is possible to describe the who, when, where and how of tourism, together with the social and economic characteristics of tourist, but not to answer the question “why”, the most interesting question of all tourist behaviour.” (Fodness, 1994, p. 556)*

1.2 In the recent times, not only has the Tourism Industry changed but the consumers for this industry or the tourists have also evolved. Today a decision to go on a trip is not merely based on social or professional obligations but to have a fun trip or a holiday with friends or an adventurous trip or even just a way to spend time with the family. What makes an individual to decide this idea of trip? Or what motivates them to go where they go? The motivation or the driving force influencing any decision on the matter of a tourist is a very important factor for the developers to know. It is very important to understand the behaviour of a tourist and the motivational factors influencing their decision to understand the behaviour pattern of the consumers of tourism industry. In the rest of the report, a consumer and a tourist are synonyms.

1.3 Especially in a very competitive world, it is very important to understand what works or what makes a product more desirable than the other. Tourism is a very important industry today and tourist destinations are the products. Just like any other product, marketing of tourism is not possible without the understanding the reasons or the motivational factors encouraging one to buy or use that product. Unfortunately in context to tourism, motivation is not a very well researched area in the Indian context. Worldwide this has been a research topic for quite a number of years, with studies having a specific focus on the motivational factors leading to tourism.

1.4 Tourism in India, especially domestic tourism has remained enigmatic, partly due to inadequate collection of data related to the sector and also due to the absence of any systematic framework for analysing the sector. Although statistics related to international visitors have been collected occasionally, data on domestic tourists have been generated only sporadically, specific to an area and generally by non-government bodies. After more than fifty years of independence, National Sample Survey Office (NSSO) in its 54th round survey (Jan-June 1998), based on a thin sample contained a tourism module along with other modules focusing on daily commuters and the use of mass media by households. The definition of a tourist underlying the survey was inconsistent with the current international definition and the survey did not include tourist expenditures except for travel costs. The other earlier surveys were typically small and were isolated attempts by state governments or business associations or researchers with specific focus relevant to either their state or business interest.

1.5 In the recent years, with growing recognition of tourism as an important source of employment and in contributing to the growth of the country, it became imperative to understand what tourism is. The Tourism Satellite Account (TSA) is a framework adopted by United Nations Statistical Commission which provides an important platform towards forging improved understanding of the structure and role of tourism in the economy. With this background, Ministry of Tourism (MoT) commissioned National Council of Applied Economic Research (NCAER) to undertake the Domestic Tourism survey in 2002. NCAER for the first time in the country undertook a comprehensive all-India Domestic Tourism Survey (DTS). The data collected from the survey as well as from an International Passenger Survey (IPS) and other official sources were used to develop the TSA for India, thereby providing internationally comparable and credible estimates of tourism in the Indian economy. The development of the TSA further strengthens the national statistical system for better capturing tourism.

1.6 Following this and with the need of updating the TSA every five years, the MoT, assigned the NSSO to undertake the 2nd DTS during July 2008 to June 2009. The all-India

household survey on domestic tourism was carried out by the NSSO as part of its 65th round.

1.7 Apart from the inputs from domestic tourism survey, the inputs or information from the Inbound tourist (Non-residents visiting the country) and Outbound tourist (residents travelling outside the country) were also required for the computation of the TSA, both of which were covered in the IPS (2010-11). The MoT commissioned the Indian Statistical Institute (ISI), Kolkata to conduct the IPS for year 2009-10. The survey targeted the following three categories of International tourists, namely foreign nationals visiting India, Non-resident Indians visiting India and Indian Residents travelling abroad. The information collected from the IPS included a number of parameters; Demographic and Social Profile of the travelers, Duration of the stay, Motivational factors responsible for attracting tourist in India, Detailed expenditure patterns of the foreign as well as the NRIs and persons of Indian origin (PIOs) on various tourism products such as the accommodation, food and beverages, transport, cultural services, entertainment etc.

Objectives of the study

1.8 There are various factors that affect the travel decisions, an important among them being the motivational factors. Other factors, of course, are finances and time that can be taken out from work schedule etc. This study attempts to answer the question on the motivational factors influencing the decision of potential tourist visiting India, using the data from IPS, 2010-11. However it should be noted that since this survey was designed specifically to provide the inputs to the construction of TSA and barely provides inputs that can be used to analyse the motivational factors of visiting India, this study suffers from data limitations and provides only that information which could be extracted from the survey data.

1.9 The keen interest of the Ministry MoT to analyse the motivational factors of tourists' visiting India prompted them to commission NCAER to prepare a report on Motivational factors of visiting India using the data collected in the IPS, 2010-11. This is part of the "3-

year integrated plan for preparation of regional TSAs for all states and UTs of India and two research topics for each year” that was commissioned to NCAER by MoT in October 2013.

1.10 The present study attempts to provide the data on motivational factors in terms of the ranks given by the respondents to each motivational factor. We have derived these data across the various age-groups of the respondents and across the countries of their usual residence. Also we have analysed the data on importance and satisfaction level of factors, again across age-groups and countries. The essence of the study is to identify the most important motivational factor of visiting India by computing the composite rank for each factor.

Structure of the report

1.11 This report is presented in four chapters. The brief outline of the study, its objectives and the chapterisation scheme are discussed in the present chapter. Chapter 2 reviews the literature on the motivational factors and consumer behaviour of the tourist. Chapter 3 describes the data source and Chapter 4 provides the results of the IPS pertaining to Motivational Factors resulting in tourism activity.

2. REVIEW OF LITERATURE

1.12 Motivation has long been an important topic in tourism research. Gee, Choy and Makens (1984) pointed out that the marketers of Tourism must understand the motivating factors that lead to travel decisions and consumption behaviour. Motivation is one of many variables such as perceptions, cultural conditioning, and learning that contribute to explaining tourist behaviour, but motivation is a critical variable because it is the driving force behind all behaviour. The basic motivation theory describes a dynamic process of internal psychological factors (needs, wants, and goals) within individuals' minds and bodies. And from a marketing perspective, tourism products can be designed and marketed as solutions to tourists' needs.

1.13 One of the most popular typology of tourist motivation is the Crompton's (1979) push and pull model which emphasizes that tourist's choice of a travel destination is influenced by two forces. Push factors that push individuals from home, and pull factors that pull individuals toward a destination. In other words, people are travelling because they are pushed by their internal motives and pulled by external forces of a travel destination (Lam and Hsu, 2006). Andreu et al (2005) and Kassean et al (2013) find that rest and relaxation is the biggest push factor for the travellers. A few other push factors are nostalgia, escape, novelty, social interaction which motivates people to make trips to places out of their usual environment.

1.14 Alexandra (2013) argues that decision-making of a tourist is influenced directly by three major criteria viz. motivators, determinants and segmentation. Segmentation is a process to divide the population into similar subgroups in terms of purchase characteristics. Furthermore, demographic (age, sex, religion, family status), geographical (region, countries, population), psychographic (lifestyle, personality), behavioural (customer's expectations towards advantages he/she can receive from the product)

variables influence the decision of every individual from the same segment. As far as the present study is concerned, since no data are available related to psychographic and behaviouristic characteristics, analysis based on these two criteria is not possible in Indian context.

1.15 Also, in line with the findings of Jonsson et al (2008) and Guha (2009), we did not find any significant difference in influence of push factors with respect to gender and same is the case with religion-based analysis. Jonsson et al (2008) also find that nationality and age are important variables and must be considered in predicting variability in tourism motivations. So, owing to the lack of data on psychographics, behaviourism and insignificance of results of gender and religion-based analysis, we have tried mapping the motivation levels of the tourists by age groups, their countries of residence in this paper.

1.16 Similarities in various studies conducted in various countries indicate that there exist the motivations for travellers and motivation levels vary significantly across subgroups of population based on age groups, countries of residence etc. It is much needed to extend the scope of research on motivation of the tourists visiting India on a continuous basis in order to determine tourists' travel behaviour.

1.17 Data gap on psychographics and behaviourism must be fulfilled in order to better understand the needs of the tourists and to formulate focussed marketing strategies. Such strategies are quintessential to develop products according to the needs of the travellers and so to attract more and more of the foreigner tourists to India.

1.18 By knowing what motivates the tourists to make a visit, not only certain forms of tourism can be encouraged in particular regions, but also the revenue from tourism can be increased by providing additional services to the tourists according to their needs.

1.19 Tourism industry's sustainability and growth is solely dependent on the travel decisions of the tourists which are reflected in travel behaviour (Vuuren et al, 2011). The push factors are beyond control of those involved in making marketing strategies, but the

pull factors are very much dependent on how well any country understands the needs of tourists and as a result of which how the strategies are formulated to attract tourists. So, in order to grow the Indian tourism sector, MoT must understand the needs and motivational factors of tourists for which focussed and intense data collection and research is much required.

3. DATA SOURCE

International Passenger Survey (IPS)

1.21 The Indian Statistical Institute (ISI), Kolkata conducted the IPS for the year 2010-11, targeting foreign nationals visiting India, NRIs visiting India and Indian residents travelling abroad. The principal objectives of the survey were to identify the foreign tourists visiting India as foreign tourists –PIOs and other foreigners – and NRIs; to estimate the total number of tourist arrivals in India and the number of outbound tourists to various countries; to assess the detailed expenditure pattern of the foreign tourists visiting the country; to evaluate the performance of existing tourist facilities in India and to estimate the average duration of stay of foreign tourists in India including country-wise details.

1.22 In addition to this, demographic, economic and social profiles of foreign tourist visiting India, the leading purposes for which the trips were undertaken and the motivational factors responsible for attracting them to India can also be obtained from the IPS.

1.23 The ISI adopted stratified sampling methodology for selecting ports (exit points) at which the passengers going out of India were interviewed face-to-face. Two different questionnaires were developed, one for collecting information on the foreign residents (NRIs, PIOs and others) and the other one for surveying outbound Indian residents.

1.24 Foreign Resident/NRI Survey covered 13 ports, namely four international airports – Chennai, Delhi, Kolkata and Mumbai; 4 other airports - Ahmedabad, Bangalore, Cochin, Hyderabad and 5 land check-posts – Attari, Haridaspur, Ghojdanga, Munabao and Sonauli. Outbound Indian Resident Survey was conducted for 11 ports out of which four are international airports – Chennai, Delhi, Kolkata and Mumbai, 4 other airports - Ahmedabad,

Bangalore, Cochin, Hyderabad and three land check-posts – Haridaspur, Ghojadanga and Munabao.

1.25 Stratified random sampling was adopted for the selection of passengers at each of the selected ports for the survey. A total of 40,672 foreign resident passengers and 9,139 outbound Indians were surveyed at the aforementioned exit points across the country.

Profile of Inbound tourists

1.26 According to the survey, a total of 66.04 lakh foreign tourists visited India during 2010-11. Of these, only 17.4 per cent were NRIs, 13.9 per cent were PIOs and the rest 68.7 per cent were foreign nationals.

1.27 The region-wise distribution of foreign tourists to India (Table 1) reveals that India received the maximum number of tourists from Asia (57.2 per cent), followed by Europe (19.6 per cent) followed by Europe (19.6 per cent), North America (15.3 per cent). Australia (4.4 per cent), Africa (2.5 per cent) and South America (0.8 per cent) accounted for less than ten per cent of the foreign tourists coming to India.

Table 1: Estimated number of International Tourists by Regions and Category

Continent of nationality	NRIs	Foreigner PIOs	Foreigner Others	All Foreigners
Asia	823169	547456	2406636	3777262
Europe	38064	173035	1085061	1296160
Africa	17683	5156	144888	167727
North America	246849	124769	638557	1010175
South America	3212	3029	49435	55676
Australia	18206	62721	208199	289126
Other Continents	1050	1110	5610	7770
Estimated Numbers	1148234	917277	4538387	6603897

Source: NCAER's computations using IPS data

1.28 Gender analysis of the foreign tourists reveals a pre-dominance of males with males having a share of nearly 69 per cent of all tourists visiting India. The table below presents the percentage distribution of foreign tourists visiting India from various continents by their gender.

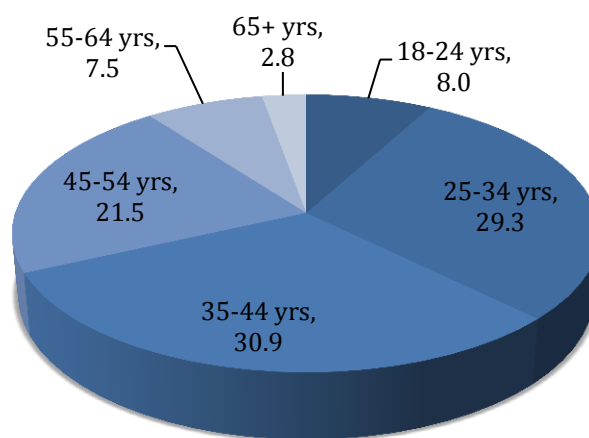
Table 2: Percentage distribution of foreign tourists by gender

Country of residence	NRIs		Foreigner PIOs		Others foreigner		All foreigners	
	Male	Female	Male	Female	Male	Female	Male	Female
Asia	79.4	20.6	76.0	24.0	73.4	26.6	75.1	24.9
Europe	81.6	18.4	43.4	56.6	56.4	43.6	55.4	44.6
Africa	32.1	67.9	71.1	28.9	68.4	31.6	64.7	35.3
North America	66.5	33.5	85.3	14.7	65.6	34.4	68.3	31.7
South America	66.4	33.6	75.3	24.7	65.6	34.4	66.1	33.9
Australia	53.3	46.7	7.6	92.4	61.2	38.8	49.1	50.9
Other Continents	82.0	18.0	89.2	10.8	71.5	28.5	75.4	24.6

Source: NCAER's computations using IPS data

1.29 In 2010-11, maximum foreign tourist arrivals in India (about 31 per cent) were from 35-44 years age group followed by the age groups of 25-34 years (29.3 per cent), 45-54 years (21.5 per cent), 18-24 years (8 per cent) and 55-64 years (7.5 per cent). Minimum were in the age group of 65 & above years (2.8 per cent). There were no responses in the age group below 18 years.

Figure 1: Percentage distribution of foreign tourists by age-group



Source: NCAER's computations using IPS data

1.30 The per cent distribution of different types of foreign tourists by purposes of travel is presented in Table 3. The most number of trips were undertaken for leisure (36.8 per cent). Among NRIs visiting India, a significant proportion of tourists (41.2 per cent) visited India for social purpose. This is closely followed by number of tourists visiting for leisure, at 37.3 per cent. Among both PIOs and other foreigner tourists, leisure was the most popular purpose of travel, with their share in total being 36.0 per cent and 36.8 per cent, respectively. For both types of tourists, this was followed by tourists travelling for business purposes. In all, one-fourth of the foreign tourists visited India for business purpose.

Table 3: Per cent distribution of foreigner tourists by category and by purpose of travel

	NRIs	PIOs	Other foreigners	All foreigners
Business	9.1	17.5	31.1	25.4
Leisure	37.3	36.0	36.8	36.8
Social	41.2	9.9	13.7	17.9
Religious	2.4	3.3	3.7	3.4
Education & training	1.8	13.2	3.8	4.8
Health & medical	1.3	2.4	6.2	4.8
Shopping	0.1	0.2	0.2	0.2
Games & sports	0.5	0.4	0.3	0.4
Jobs on foreign deputation	0.8	0.7	1.7	1.4
Invited by India on specific assignment	3.9	15.7	1.2	3.7
Others	1.5	0.6	1.3	1.2
Total	100.0	100.0	100.0	100.0

Source: NCAER's computation using IPS data

4. SURVEY FINDINGS

1.31 With regard to motivational factors, the IPS identifies ten factors and asks the respondent tourists to rank five of them in descending order such that the most important motivational factor is ranked first and the least important is ranked fifth. Also, each factor was to be ranked in descending order of its level of satisfaction. These factors are listed below:

- Monuments, forts, palaces, museum
- Hill stations
- Religious places
- Medical treatment, yoga, meditation
- Wildlife
- Fairs & festivals, theme parks
- Adventure places
- Shopping
- Visiting relatives
- Others (to be specified)

1.32 According to the data, by and large, only first four factors were predominant. Hence, for this study, we have clubbed all the rest of the factors into one and called it “Others”. The key findings present the number of tourists, by type of tourists, who ranked each factor as 1, 2, 3, 4 and 5. The results have also been extracted for such number of tourists across various age-groups and countries of normal residence.

1.33 The following table (Table 4) presents the per cent distribution of number of tourists giving each rank to each of the factor of motivation. This is presented by type of tourists. The absolute numbers for this table are given in Appendix Table A1.

Table 4: Per cent distribution of tourists giving ranks by motivational factors

	Motivational factors / Attractions	Rank				
		1	2	3	4	5
NRIs	Monuments, forts, palaces, museum	81.3	60.4	64.3	65.3	70.4
	Hill stations, mountains, beaches, scenic places	10.3	14.5	5.9	19.8	20.0
	Religious places	3.9	18.2	27.8	8.8	7.9
	Medical treatment, yoga, meditation & spiritual healing	0.5	2.3	0.5	6.2	1.5
	Others	4.0	4.6	1.6	0.0	0.1
	Total	100.0	100.0	100.0	100.0	100.0
PIOs	Monuments, forts, palaces, museum	79.6	86.4	84.8	68.2	64.9
	Hill stations, mountains, beaches, scenic places	13.7	5.0	5.0	20.4	27.1
	Religious places	3.9	5.3	8.3	10.9	7.9
	Medical treatment, yoga, meditation & spiritual healing	1.3	0.9	1.1	0.6	0.0
	Others	1.5	2.3	0.8	0.0	0.0
	Total	100.0	100.0	100.0	100.0	100.0
Other foreigners	Monuments, forts, palaces, museum	70.8	77.1	72.0	79.5	76.5
	Hill stations, mountains, beaches, scenic places	7.5	12.0	11.2	10.9	14.9
	Religious places	7.9	5.7	11.4	7.9	4.6
	Medical treatment, yoga, meditation & spiritual healing	3.7	0.5	1.9	0.3	2.4
	Others	10.1	4.7	3.5	1.4	1.6
	Total	100.0	100.0	100.0	100.0	100.0
All foreigners	Monuments, forts, palaces, museum	74.1	76.5	71.3	75.1	73.8
	Hill stations, mountains, beaches, scenic places	9.1	11.5	9.1	13.8	17.4
	Religious places	6.5	6.8	15.5	8.4	5.9
	Medical treatment, yoga, meditation & spiritual healing	2.7	0.7	1.4	1.7	2.0
	Others	7.5	4.4	2.7	0.9	1.0
	Total	100.0	100.0	100.0	100.0	100.0

Source: NCAER's computation using IPS data

1.34 Among all the motivational factors, “monuments, forts, palaces and museums” turned out to be the biggest motivational factor for tourists visiting India, across all types of tourists. This is evident from the column distribution of number of

tourists. However, row distribution is also meaningful as it gives the proportion of tourists giving rank 1 or 2 amongst all the tourists who gave rank to each factor. This is presented in the table below:

Table 5: Per cent distribution of tourists by different ranks

	Motivational factors / Attractions	Rank				
		1	2	3	4	5
NRIs	Monuments, forts, palaces, museum	52.5	8.2	17.9	9.4	11.9
	Hill stations, mountains, beaches, scenic places	40.3	12.0	10.0	17.2	20.6
	Religious places	16.4	16.1	50.4	8.3	8.8
	Medical treatment, yoga, meditation & spiritual healing	15.9	16.7	6.9	47.1	13.5
	Others	70.5	17.2	11.8	0.0	0.4
	Total	47.0	9.9	20.3	10.5	12.3
PIOs	Monuments, forts, palaces, museum	65.1	15.6	11.1	5.0	3.3
	Hill stations, mountains, beaches, scenic places	71.8	5.8	4.2	9.5	8.7
	Religious places	49.5	15.0	16.9	12.4	6.2
	Medical treatment, yoga, meditation & spiritual healing	75.6	11.1	10.3	3.1	0.0
	Others	69.2	24.5	6.4	0.0	0.0
	Total	65.3	14.4	10.5	5.8	4.0
Other foreigners	Monuments, forts, palaces, museum	47.2	24.4	12.3	9.0	7.2
	Hill stations, mountains, beaches, scenic places	37.6	28.4	14.3	9.2	10.4
	Religious places	50.8	17.6	18.8	8.7	4.2
	Medical treatment, yoga, meditation & spiritual healing	76.5	5.3	10.0	1.1	7.1
	Others	73.9	16.2	6.6	1.7	1.6
	Total	49.0	23.3	12.6	8.3	6.9
All foreigners	Monuments, forts, palaces, museum	50.8	20.2	13.1	8.5	7.4
	Hill stations, mountains, beaches, scenic places	43.7	21.3	11.8	10.9	12.3
	Religious places	41.8	17.0	26.8	8.9	5.5
	Medical treatment, yoga, meditation & spiritual healing	68.8	7.2	9.6	7.0	7.3
	Others	73.4	16.6	7.1	1.5	1.5
	Total	50.9	19.6	13.7	8.4	7.5

Source: NCAER's computation using IPS data

1.35 These tables suggest that of all the cases where response is rank 1, 74.1 per cent chose “monuments, forts, palaces and museums” as their most motivational factor, but of all the cases where “monuments, forts, palaces and museums” was ranked, only 50.8 per cent gave first rank to it. Hence, both column and row distributions, though meaningful, are incomplete presentation of the required analysis.

1.36 It is for this reason that we have derived a composite value of importance for each factor which gives weightage to responses against not just first rank but also the second, third, fourth and fifth ranks. The methodology for deriving this composite value is as follows:

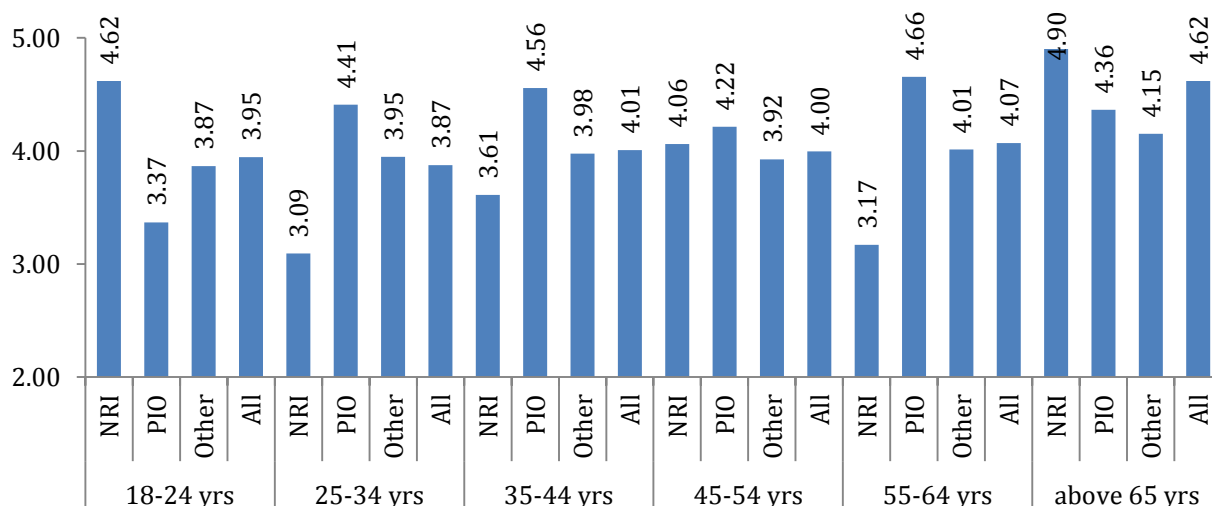
Methodology for deriving “composite value of importance”

1.37 Ranks 1, 2, 3, 4 and 5 are assigned values 5, 4, 3, 2 and 1 respectively so that highest value (that is, 5) is given to rank 1, lesser to rank 2 and so on.

1.38 Weighted average of ranks, termed as composite value of importance, is calculated where weights are the number of responses against each rank. The interpretation of these composite values of importance is that higher its value, more important motivational factor it was for the tourists, belonging to a specific category. Hence, a value of 5 for a factor would mean that all the tourists giving response to that factor gave first rank to it or identified it as the most important factor. Similarly, a value of 1 would mean that all the tourists giving response to a factor gave fifth rank to that factor or identified it as the least important factor.

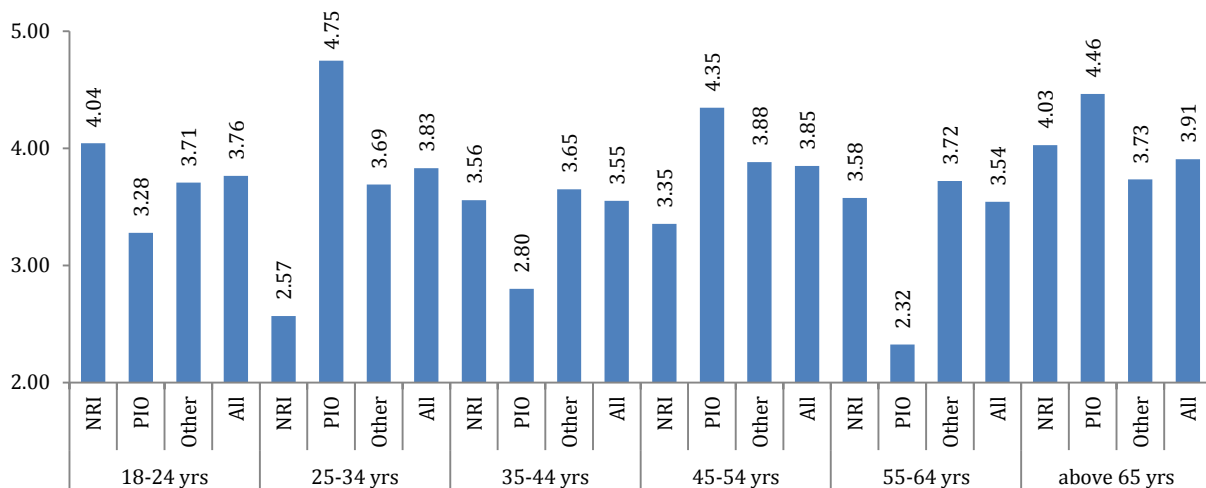
1.39 The following figures present the composite values of importance for each motivational factor by different age-groups.

Figure 2: Composite value of importance for “Monuments, Forts, Palaces and Museums” by age-groups



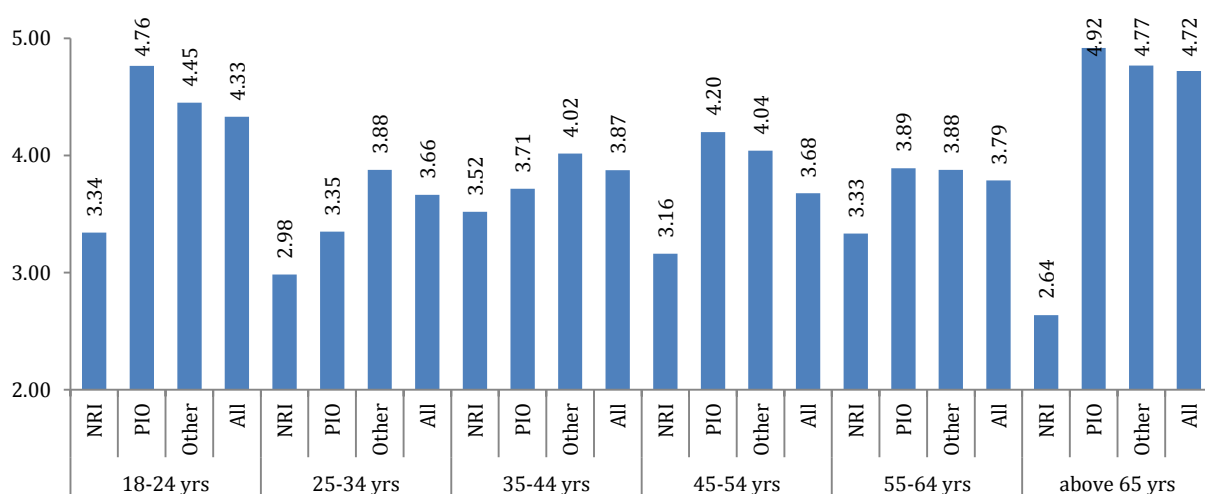
Source: NCAER's computation using IPS data

Figure 3: Composite value of importance for “Hill stations, mountains, beaches, scenic places” by age-groups



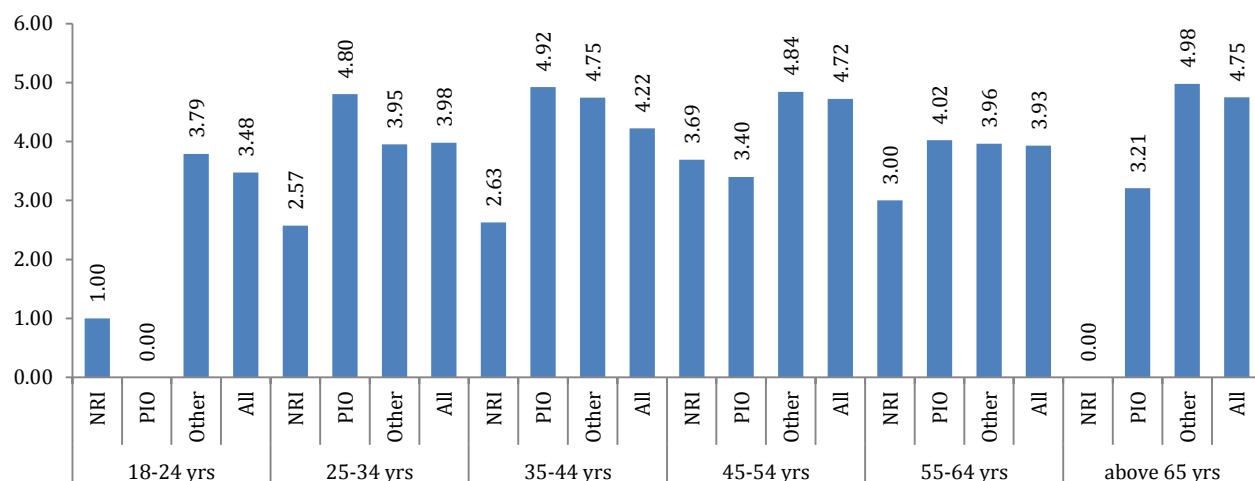
Source: NCAER's computation using IPS data

Figure 4: Composite value of importance for “Religious places” by age-groups



Source: NCAER's computation using IPS data

Figure 5: Composite value of importance for “Medical treatment, yoga, meditation & spiritual healing” by age-groups



Source: NCAER's computation using IPS data

Figure 6: Composite value of importance for “Other Motivational Factors” by age-groups



Source: NCAER's computation using IPS data

1.40 According to this exercise, and as given in figures above, the following key findings emerge:

- The overall composite value for “monuments, forts, palaces and museums” among tourists of age-group 18-24 years is 3.95. Across type of tourists, the highest value was observed in the case of NRIs (4.62) and the lowest among PIOs (3.37).
- Across all the age groups, highest composite value (4.90) for “monuments, forts, palaces and museums” was observed among NRIs of age above 65 years. The lowest value was given by NRIs of age group 25 to 34 years.
- With respect to “Hill stations, mountains, beaches, scenic places”, the highest value of importance was observed in the case of PIOs of age-group 25 to 34 years

(4.75) and the lowest was observed in the case of PIOs of age-group 55 to 64 years (2.32).

- “Religious places” was the most important motivational factor for PIOs of age above 65 years. In this age-group, other foreigners also gave high importance to this motivational factor but NRIs found it the least driving factor for visiting India.
- “Medical treatment, yoga, meditation and spiritual healing” was the most important motivational factor for other foreigners of age above 65 years. There were no responses against this factor by NRIs of age above 65 years and PIOs of age 18 to 24 years. NRIS, by and large, identified this factor as less important factor across all the age-groups except 45 to 54 years.
- Although responses against “Other motivational factors” were not very significant in number, but the highest proportion of tourists who chose this factor as one of the five motivational factors gave first rank to it. This resulted in fairly high composite value for this factor, across all age-groups and all types of tourists.

1.41 The similar composite values of importance for each factor are worked out for tourists of various countries of residence too. These values are given in the tables below. The countries listed are the top 15 countries in terms of tourists arrivals in India.

**Table 6: Composite value of importance for “Monuments, Forts, Palaces and Museums”
by countries of residence**

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	2.83	3.38	3.56	3.53
Canada	3.25	4.48	4.22	4.15
China	4.80	4.88	4.04	4.58
France	3.45	4.87	3.99	4.19
Germany	2.88	4.88	4.25	4.32
Hong Kong	2.63	4.35	3.77	3.74
Japan	4.86	3.84	3.72	4.15
Malaysia	3.83	3.41	3.52	3.64
Singapore	2.72	3.96	3.98	3.73
Sri Lanka	3.62	3.90	3.53	3.62
Switzerland	4.44	3.98	4.08	4.09
Thailand	4.49	4.61	4.04	4.18
UAE	3.97	3.77	3.94	3.94
UK	3.52	4.19	3.95	3.94
USA	3.65	4.08	3.91	3.87
Others	3.39	4.37	4.02	4.02

Source: NCAER's computation using IPS data

Table 7: Composite value of importance for “Hill stations, mountains, beaches, scenic places” by countries of nationality

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	2.18	3.00	3.66	3.36
Canada	2.45	3.15	3.11	2.99
China	4.96	4.52	3.61	4.39
France	2.99	3.87	3.54	3.50
Germany	2.28	2.69	3.68	3.61
Hong Kong	3.55	-	2.91	3.11
Japan	3.15	3.77	3.36	3.39
Malaysia	4.49	2.23	3.67	3.51
Singapore	2.44	1.99	3.78	3.18
Sri Lanka	3.27	4.85	3.11	4.26
Switzerland	4.41	5.00	3.40	3.45
Thailand	3.26	4.41	4.49	4.46
UAE	2.41	2.76	3.70	3.15
UK	4.10	3.31	3.82	3.85
USA	2.54	3.33	3.47	3.17
Others	3.69	4.77	3.89	4.04

Source: NCAER's computation using IPS data

Table 8: Composite value of importance for “Religious places” by countries of nationality

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	2.83	5.00	3.84	3.56
Canada	4.32	3.00	4.16	4.23
China	4.53	3.54	3.96	3.94
France	2.97	1.82	4.39	3.96
Germany	2.52	5.00	4.38	4.36
Hong Kong	4.00	4.21	2.98	3.15
Japan	4.60	3.00	4.13	4.07
Malaysia	3.10	3.11	3.63	3.20
Singapore	3.07	4.82	4.27	3.63
Sri Lanka	3.30	3.74	4.11	3.95
Switzerland	4.61	4.59	4.72	4.68
Thailand	3.16	4.30	4.35	4.30
UAE	3.19	4.25	3.58	3.48
UK	2.85	2.35	3.42	3.31
USA	3.24	3.62	4.29	3.87
Others	3.70	4.47	4.13	4.12

Source: NCAER's computation using IPS data

Table 9: Composite value of importance for “Medical treatment, yoga, meditation & spiritual healing” by countries of nationality

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	4.19	4.00	1.76	2.29
Canada	-	5.00	1.71	1.77
China	1.84	-	3.90	3.59
France	-	-	3.64	3.64
Germany	4.00	-	4.14	4.14
Hong Kong	1.00	-	2.99	1.87
Japan	-	-	3.56	3.56
Malaysia	3.29	5.00	3.97	3.77
Singapore	2.35	-	4.80	4.52
Sri Lanka	2.00	-	2.87	2.59
Switzerland	-	-	3.95	3.95
Thailand	4.00	4.00	3.72	3.84
UAE	3.20	3.19	4.40	3.94
UK	1.66	2.52	4.17	3.76
USA	3.56	3.99	3.48	3.54
Others	2.44	4.94	4.87	4.62

Source: NCAER's computation using IPS data

Table 10: Composite value of importance for “Other Motivational factors” by countries of nationality

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	-	-	4.26	4.26
Canada	4.69	-	4.70	4.70
China	5.00	5.00	4.79	4.82
France	4.00	4.14	4.42	4.40
Germany	-	5.00	4.81	4.81
Hong Kong	-	5.00	4.37	4.39
Japan	5.00	5.00	4.81	4.83
Malaysia	4.31	4.05	4.71	4.52
Singapore	4.89	5.00	4.85	4.87
Sri Lanka	4.83	4.00	4.66	4.52
Switzerland	-	-	4.76	4.76
Thailand	-	5.00	4.85	4.86
UAE	4.78	4.88	4.75	4.77
UK	4.84	4.89	4.89	4.88
USA	4.03	4.69	4.85	4.75
Others	4.49	4.67	4.48	4.49

Source: NCAER's computation using IPS data

1.42 The key findings from the above tables are:

- The overall composite value for “monuments, forts, palaces and museums” among NRIs is the highest (4.86) for tourists coming from Japan followed by those coming from China. Among PIOs, highest value (4.88) is for tourists coming from China and Germany followed by France (4.87). Among “Other foreigners”, tourists from Canada gave the highest value to this factor.

- Among those who chose “hill stations, mountains, beaches, scenic places” as one of the five motivational factors, highest importance was given by NRIs from China (4.96), PIOs from Switzerland (5.00) and ‘other foreigners’ from Thailand (4.49).
- “Religious places” was a less important motivational factor for NRIs, with its composite value of importance ranging from 2.52 to 4.61. However, all the PIOs from Australia who chose this factor as one of the five motivational factors, gave the first rank to this factor, so that the composite value is 5.00.

1.43 Apart from the rank, the respondents were also asked to indicate their level of satisfaction pertaining to these factors by giving responses ranging from “Fully satisfied”, “Satisfied”, “Not satisfied” to “No comments”. The following table presents the per cent distribution of number of tourists giving their responses on level of satisfaction for each factor of motivation. The absolute numbers for this table are given in Appendix Table A2.

Table 11: Per cent distribution of tourists responding to level of satisfaction by motivational factors

	Motivational factors / Attractions	Satisfaction level			
		Fully satisfied	Partially satisfied	Not satisfied	No comments
NRIs	Monuments, forts, palaces, museum	73.0	70.7	76.3	83.7
	Hill stations, mountains, beaches, scenic places	10.2	19.4	13.1	15.1
	Religious places	12.3	7.3	7.6	1.2
	Medical treatment, yoga, meditation & spiritual healing	1.5	1.0	0.9	0.0
	Others	3.0	1.6	2.1	0.0
	Total	100.0	100.0	100.0	100.0
PIOs	Monuments, forts, palaces, museum	79.5	82.9	62.8	79.3
	Hill stations, mountains, beaches, scenic places	12.7	10.7	17.2	20.3
	Religious places	5.3	4.0	15.2	0.4
	Medical treatment, yoga, meditation & spiritual healing	1.3	0.5	0.0	0.0
	Others	1.3	1.9	4.8	0.0
	Total	100.0	100.0	100.0	100.0
Other foreigners	Monuments, forts, palaces, museum	73.3	70.7	70.0	82.6
	Hill stations, mountains, beaches, scenic places	8.2	15.0	19.1	12.8
	Religious places	8.0	8.4	4.8	2.6
	Medical treatment, yoga, meditation & spiritual healing	2.5	2.7	2.0	0.4
	Others	8.0	3.2	4.1	1.6
	Total	100.0	100.0	100.0	100.0
All foreigners	Monuments, forts, palaces, museum	74.1	72.4	71.2	82.6
	Hill stations, mountains, beaches, scenic places	9.3	15.3	17.3	13.1
	Religious places	8.4	7.6	6.4	2.5
	Medical treatment, yoga, meditation & spiritual healing	2.1	2.0	1.5	0.3
	Others	6.1	2.7	3.6	1.5
	Total	100.0	100.0	100.0	100.0

Source: NCAER's computations using IPS data

1.44 Similarly, row distribution gives the proportion of tourists responding to each response of level of satisfaction amongst all the tourists who responded for each factor. The row distribution is given in Table 12:

Table 12: Per cent distribution of tourists by different responses of satisfaction level

	Motivational factors / Attractions	Satisfaction level			
		Fully satisfied	Partially satisfied	Not satisfied	No comments
NRIs	Monuments, forts, palaces, museum	78.2	17.4	3.0	1.3
	Hill stations, mountains, beaches, scenic places	66.4	29.1	3.1	1.5
	Religious places	86.2	11.7	1.9	0.1
	Medical treatment, yoga, meditation & spiritual healing	84.9	13.3	1.8	0.0
	Others	87.0	10.8	2.3	0.0
	Total	78.0	18.0	2.9	1.2
PIOs	Monuments, forts, palaces, museum	81.0	17.0	0.8	1.2
	Hill stations, mountains, beaches, scenic places	82.6	14.1	1.4	1.9
	Religious places	84.1	12.7	3.1	0.1
	Medical treatment, yoga, meditation & spiritual healing	92.8	7.2	0.0	0.0
	Others	74.1	22.3	3.7	0.0
	Total	81.4	16.4	1.0	1.2
Other foreigners	Monuments, forts, palaces, museum	75.1	14.8	1.8	8.3
	Hill stations, mountains, beaches, scenic places	63.2	23.6	3.6	9.6
	Religious places	79.1	17.1	1.2	2.6
	Medical treatment, yoga, meditation & spiritual healing	79.9	17.5	1.6	1.1
	Others	89.7	7.4	1.1	1.7
	Total	75.4	15.4	1.9	7.4
All foreigners	Monuments, forts, palaces, museum	76.6	15.6	1.8	6.0
	Hill stations, mountains, beaches, scenic places	67.0	23.2	3.1	6.7
	Religious places	81.4	15.3	1.5	1.7
	Medical treatment, yoga, meditation & spiritual healing	81.5	16.2	1.5	0.9
	Others	88.9	8.2	1.3	1.5
	Total	76.7	16.0	1.9	5.4

Source: NCAER's computations using IPS data

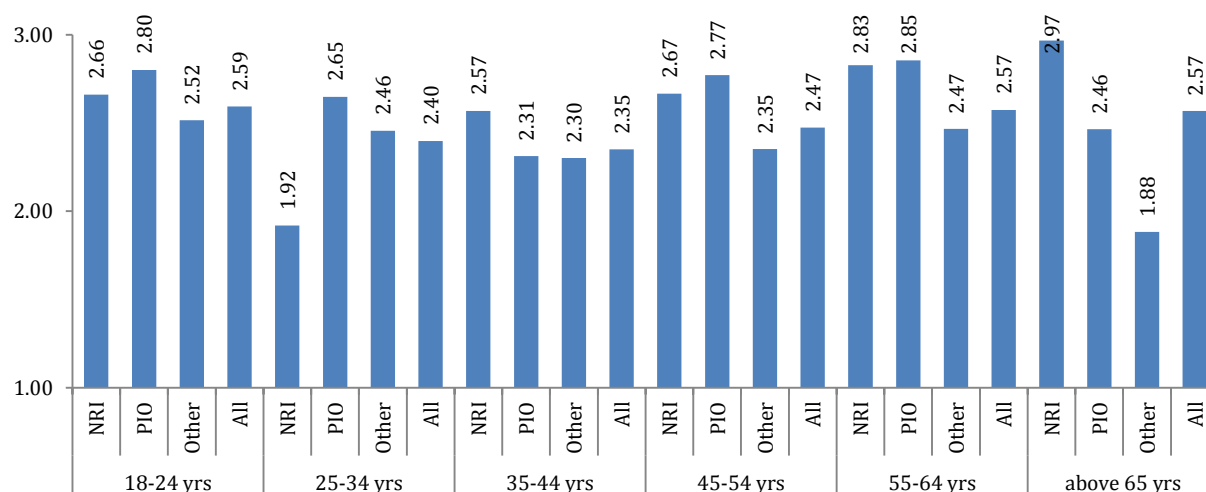
1.45 As done before, “composite value of satisfaction level” has also been computed and is described below.

Methodology for deriving “composite value of satisfaction level”

1.46 The responses - “Fully satisfied”, “Satisfied”, “Not satisfied” and “No comments” are assigned values 3, 1, -1 and 0 respectively. A negative value, -1, is chosen for “Not satisfied” so that the overall value is deflated by the adverse level of satisfaction.

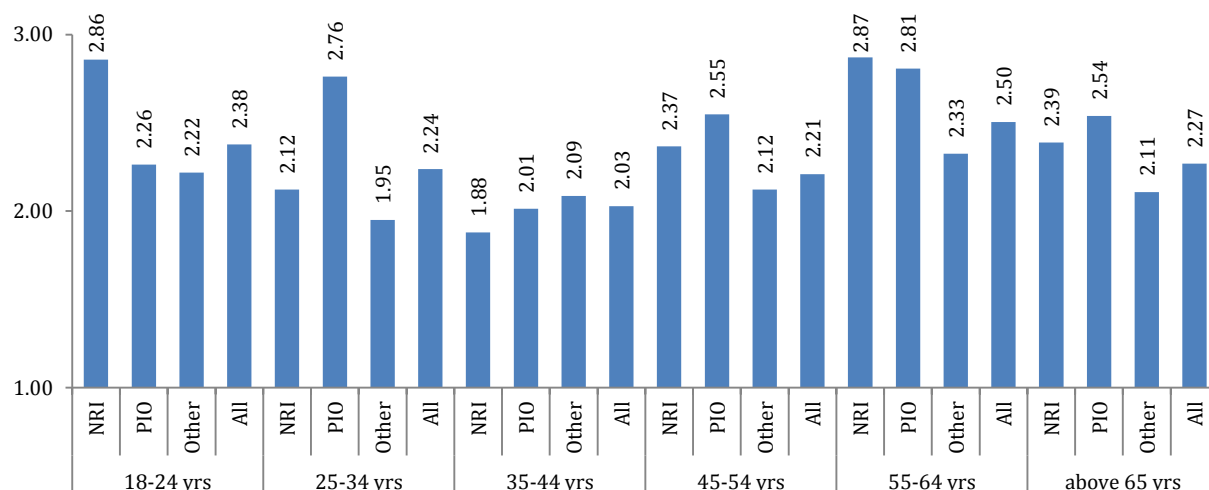
1.47 The weighted average of these values is calculated using the number of responses as weights. This is called the composite value of satisfaction level. The interpretation of these composite values of satisfaction level is that higher its value, higher the level of satisfaction for respective motivational factor ranked by tourists, belonging to a specific category. The following figures present the composite values of satisfaction level for each motivational factor by different age-groups.

Figure 7: Composite value of satisfaction level for “Monuments, Forts, Palaces and Museums” by age-groups



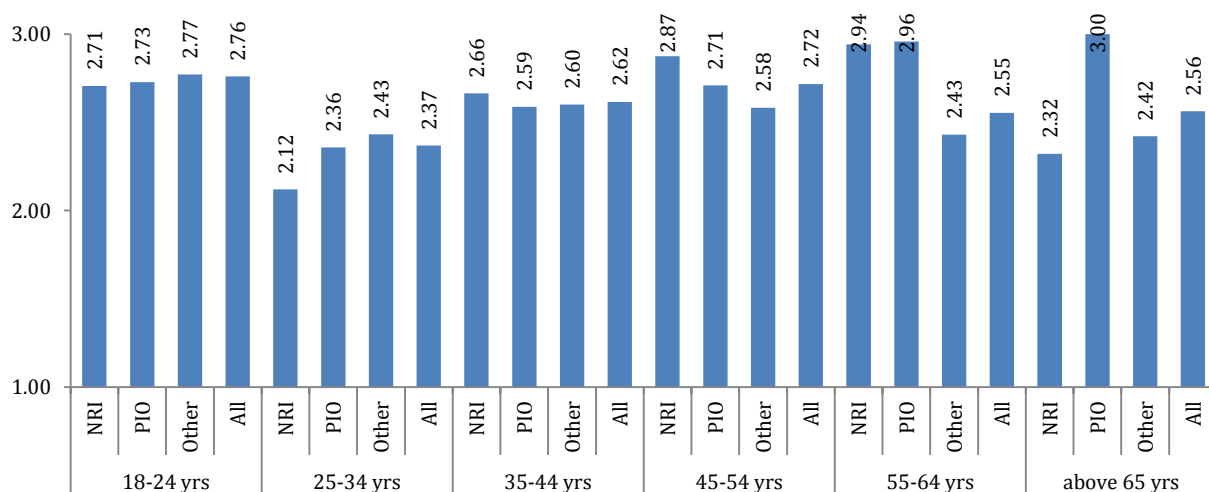
Source: NCAER's computations using IPS data

Figure 8: Composite value of satisfaction level for “Hill stations, mountains, beaches, scenic places” by age-groups



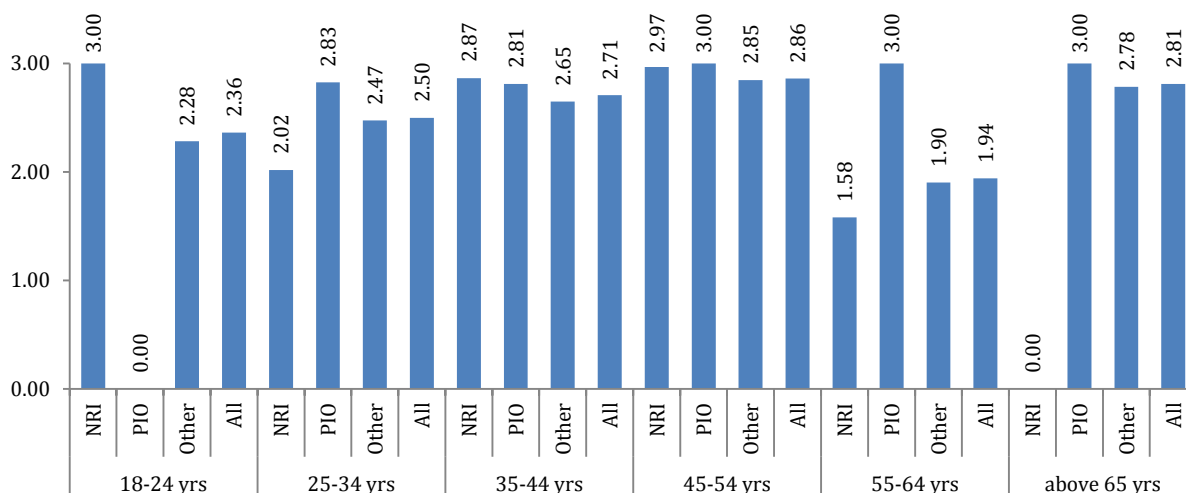
Source: NCAER's computations using IPS data

Figure 9: Composite value of satisfaction level for “Religious places” by age-groups



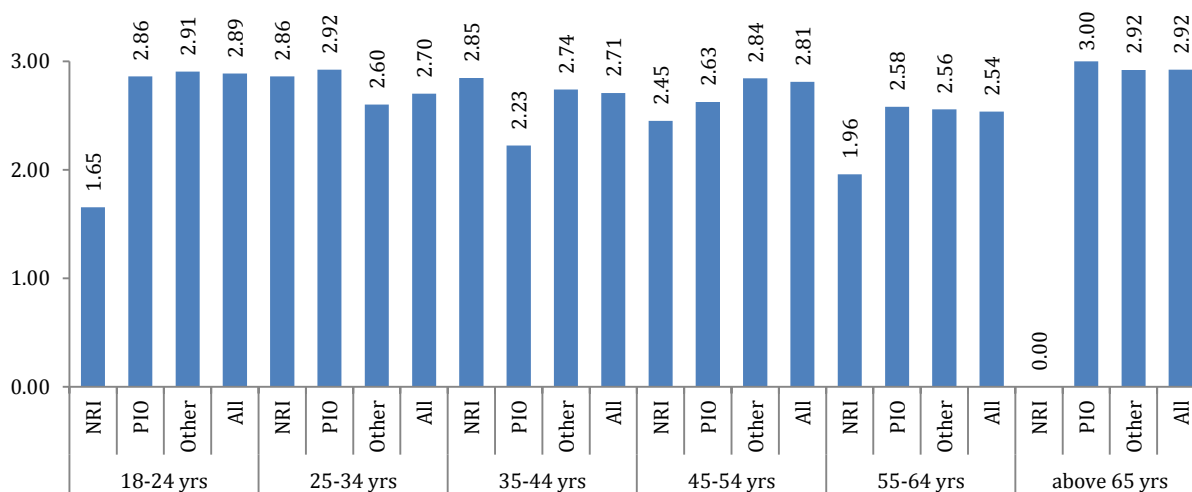
Source: NCAER's computations using IPS data

Figure 10: Composite value of satisfaction level for “Medical treatment, yoga, meditation & spiritual healing” by age-groups



Source: NCAER's computations using IPS data

Figure 11: Composite value of satisfaction level for “Other Motivational Factors” by age-groups



Source: NCAER's computations using IPS data

1.48 It is evident that the satisfaction level for each motivational factor has been quantified on a scale of -1 to 3. Hence when the composite value is 3, it signifies that all the respondents giving their response on level of satisfaction were fully satisfied by that factor during their visit to India. And for no response by any of the respondent, this value turns out to be 0.

1.49 The similar composite values of satisfaction level have been worked out for tourists of various countries of residence. These values are given in the tables below. The countries listed are the top 15 countries in terms of tourist arrivals.

Table 13: Composite value of satisfaction level for “Monuments, Forts, Palaces and Museums” by countries of residence

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	1.66	2.18	2.50	2.46
Canada	1.53	2.63	2.83	2.68
China	2.93	2.95	2.32	2.74
France	2.50	2.93	2.62	2.70
Germany	2.33	2.93	2.70	2.73
Hong Kong	2.47	2.74	2.53	2.55
Japan	2.88	2.67	2.42	2.62
Malaysia	2.85	2.34	2.57	2.67
Singapore	2.16	2.39	2.57	2.46
Sri Lanka	2.36	2.43	2.40	2.40
Switzerland	2.86	2.55	2.65	2.65
Thailand	2.78	2.76	2.52	2.59
UAE	2.53	2.51	2.61	2.57
UK	2.39	2.39	2.60	2.58
USA	2.42	2.88	2.61	2.59
Others	2.29	2.39	2.62	2.54

Source: NCAER's computation using IPS data

Table 14: Composite value of satisfaction level for “Hill stations, mountains, beaches, scenic places” by countries of nationality

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	2.18	1.72	2.21	2.15
Canada	1.95	1.52	2.25	2.05
China	2.95	2.97	2.62	2.84
France	2.32	1.41	2.19	2.16
Germany	1.64	2.61	1.60	1.64
Hong Kong	2.52	-	2.07	2.27
Japan	3.00	2.36	2.73	2.71
Malaysia	2.51	2.69	2.25	2.51
Singapore	1.90	0.95	2.34	2.11
Sri Lanka	2.52	2.83	1.61	2.46
Switzerland	3.00	3.00	2.02	2.07
Thailand	1.68	1.99	2.67	2.60
UAE	2.48	1.95	2.10	2.24
UK	1.29	1.09	2.15	1.91
USA	2.41	1.86	2.36	2.36
Others	2.47	2.89	2.56	2.61

Source: NCAER's computation using IPS data

Table 15: Composite value of satisfaction level for “Religious places” by countries of nationality

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	3.00	3.00	2.63	2.80
Canada	1.93	3.00	1.94	1.94
China	2.05	3.00	2.68	2.69
France	1.91	1.33	2.25	2.12
Germany	2.05	3.00	2.18	2.23
Hong Kong	3.00	2.21	2.31	2.36
Japan	3.00	3.00	2.97	2.98
Malaysia	2.90	2.97	2.70	2.87
Singapore	2.63	3.00	2.73	2.68
Sri Lanka	1.72	2.11	2.59	2.40
Switzerland	2.23	2.18	2.23	2.22
Thailand	3.00	2.27	2.65	2.65
UAE	2.63	2.79	2.22	2.44
UK	2.31	0.03	2.35	2.20
USA	2.50	2.72	2.43	2.48
Others	2.48	2.85	2.71	2.70

Source: NCAER's computation using IPS data

Table 16: Composite value of satisfaction level for “Medical treatment, yoga, meditation & spiritual healing” by countries of nationality

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	2.65	3.00	1.43	1.73
Canada	-	3.00	1.38	1.41
China	1.42	-	1.45	1.44
France	-	-	2.90	2.90
Germany	1.00	-	2.46	2.43
Hong Kong	3.00	-	2.67	2.87
Japan	-	-	1.96	1.96
Malaysia	2.00	1.00	1.88	1.79
Singapore	3.00	-	2.89	2.90
Sri Lanka	3.00	-	0.87	1.57
Switzerland	-	-	1.91	1.91
Thailand	3.00	1.00	0.44	1.26
UAE	2.17	2.62	2.70	2.55
UK	3.00	3.00	2.50	2.61
USA	2.96	3.00	1.54	1.93
Others	2.69	2.90	2.86	2.84

Source: NCAER's computation using IPS data

Table 17: Composite value of satisfaction level for “Other Motivational factors” by countries of nationality

Countries of residence	NRIs	PIOs	Other foreigners	All foreigners
Australia	-	-	2.06	2.06
Canada	2.76	-	2.99	2.95
China	3.00	1.93	2.89	2.82
France	1.00	1.28	2.72	2.63
Germany	-	2.12	2.92	2.91
Hong Kong	-	1.00	2.82	2.76
Japan	2.19	2.18	2.53	2.49
Malaysia	2.06	0.39	2.74	2.29
Singapore	3.00	1.25	2.74	2.77
Sri Lanka	3.00	2.23	0.34	2.02
Switzerland	-	-	2.84	2.84
Thailand	-	3.00	2.80	2.80
UAE	2.87	2.29	2.52	2.58
UK	3.00	1.54	2.86	2.89
USA	2.50	2.78	2.80	2.77
Others	2.59	2.76	2.85	2.83

Source: NCAER's computation using IPS data

1.50 The key findings from the above exhibits are:

- The overall composite value of satisfaction level for “monuments, forts, palaces and museums” is the highest (2.97) among NRIs of age above 65 years. However, the lowest value (1.88) is observed among “other foreigners” in the same age-group.
- For “religious places”, the composite value for all types of tourists and of all the age groups is above 2.0 and is the highest (3.0) among PIOs of age above 65 years.

- For three categories like NRIs of age-group 18 to 24 years, PIOs of age-group 55 to 64 years and PIOs of age-group above 65 years, , although the number of respondents for “medical treatment, yoga, meditation & spiritual healing” is very low, but all of them were fully satisfied. Hence the composite value is 3.0 for all of these three categories.
- The overall composite value of satisfaction for “monuments, forts, palaces and museums” among NRIs is the highest (2.93) for tourists coming from China closely followed by those coming from Japan (2.88), Switzerland (2.86) and Malaysia (2.85). Among PIOs, highest value (2.95) is for tourists coming from China followed by France and Germany (2.93 for each country). Among “Other foreigners”, tourists from Canada gave the highest value (2.83) to this factor.
- Among those who chose “hill stations, mountains, beaches, scenic places” as one of the five motivational factors, most satisfied were the NRIs from Japan (3.00), PIOs from Switzerland (3.00) and ‘other foreigners’ from Japan (2.73).
- “Religious places” was very satisfactory motivational factor for NRIs from Australia, Hong Kong, Japan, and Thailand with its composite value of satisfaction being 3.00 which means all the NRIs from these countries who chose this factor as one of the five motivational factors, were fully satisfied by this factor, so that the composite value is 3.00. Similarly, satisfaction index value for PIOs from Australia, Canada, China, Germany, Japan and Singapore is also 3.00 which indicate the full satisfaction of PIOs coming from these countries with “Religious Places” as their motivational factor. However, other foreigners were less satisfied with “Religious Places” and value of satisfaction index score ranges from 1.94 to 2.97.

Concluding Remarks

1.51 The purpose of this study was to determine the main reasons that motivate the foreign tourists to visit India. India is one of the few countries that offers a wide range of destinations for potential tourists. People visit India for various reasons - to spectacle the miraculous beauty of monuments, forts and palaces which reflect India's ancient culture and heritage; to admire the bounties of scenic beauty offered by ranges of mountains, hills; to stretch out on the serene sands of Indian beaches; to explore the panorama of wildlife; to seek spiritual solace at many holy places; to practice yoga and attain eternal peace and so on.

1.52 This study is meant to give inputs to tourism marketers on what are the most driving factors that motivate the tourists to visit India. The results indicate that a significant number of tourists chose "monuments, forts, palaces and museums" as one of the five motivational factors to visit India, hence can be considered as the most sought after destination but this is not the most important motivational factor as the proportion of tourists giving first rank to this factor is only 50 per cent.

1.53 To get a better understanding of this, composite values of importance and satisfaction are computed for each type of tourists across both age-groups and countries of residence. These values are the weighted average of responses against each rank.

1.54 The study infers that the importance of each factor varies across age-groups and countries of residence. While "monuments, forts, palaces and museums" are the most popular destinations, other destinations like hill stations, beaches, religious places, etc should also be promoted and developed to match with other Asian countries that offer similar destinations.

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APPENDIX TABLES

Table A1: Number of tourists responding to each rank by motivational factors

	Motivational factors / Attractions	Rank				
		1	2	3	4	5
NRIs	Monuments, forts, palaces, museum	422481	66152	144285	75749	96122
	Hill stations, mountains, beaches, scenic places	53583	15908	13236	22935	27331
	Religious places	20319	19920	62301	10212	10823
	Medical treatment, yoga, meditation & spiritual healing	2418	2538	1044	7150	2046
	Others	20763	5069	3486	0	125
	Total	519564	109586	224352	116047	136446
PIOs	Monuments, forts, palaces, museum	431360	103235	73647	32932	21673
	Hill stations, mountains, beaches, scenic places	74450	6016	4361	9848	9057
	Religious places	21063	6368	7189	5252	2654
	Medical treatment, yoga, meditation & spiritual healing	7009	1027	950	283	0
	Others	7883	2791	724	0	0
	Total	541765	119437	86872	48315	33384
Other foreigners	Monuments, forts, palaces, museum	1423316	735455	371175	271229	216030
	Hill stations, mountains, beaches, scenic places	151743	114656	57829	37080	42126
	Religious places	158183	54693	58513	27100	13000
	Medical treatment, yoga, meditation & spiritual healing	74025	5147	9706	1074	6859
	Others	203277	44517	18160	4741	4534
	Total	2010544	954468	515382	341224	282548
All foreigners	Monuments, forts, palaces, museum	2277156	904841	589107	379910	333825
	Hill stations, mountains, beaches, scenic places	279776	136580	75426	69863	78514
	Religious places	199565	80981	128003	42564	26477
	Medical treatment, yoga, meditation & spiritual healing	83452	8712	11700	8508	8905
	Others	231923	52377	22370	4741	4658
	Total	3071872	1183490	826606	505586	452378

Source: NCAER's computation using IPS data

Table A2: Number of tourists responding to each level of satisfaction by motivational factors

	Motivational factors / Attractions	Rank			Total	
		Fully satisfied	Partially satisfied	Rank not satisfied		No comments
NRIs	Monuments, forts, palaces, museum	629654	140429	24090	10784	804957
	Hill stations, mountains, beaches, scenic places	88270	38648	4126	1949	132993
	Religious places	106539	14476	2400	159	123575
	Medical treatment, yoga, meditation & spiritual healing	12896	2027	273	0	15196
	Others	25611	3167	664	0	29442
	Total	862970	198747	31554	12892	1106163
PIOs	Monuments, forts, palaces, museum	536680	112680	5434	7813	662607
	Hill stations, mountains, beaches, scenic places	85649	14594	1490	1998	103731
	Religious places	35783	5389	1315	40	42526
	Medical treatment, yoga, meditation & spiritual healing	8606	664	0	0	9270
	Others	8440	2539	419	0	11398
	Total	675158	135866	8657	9851	829532
Other foreigners	Monuments, forts, palaces, museum	2266623	447177	53165	249661	3016626
	Hill stations, mountains, beaches, scenic places	255064	95144	14527	38699	403434
	Religious places	246211	53354	3675	7994	311234
	Medical treatment, yoga, meditation & spiritual healing	77273	16910	1502	1077	96762
	Others	247077	20323	3130	4771	275302
	Total	3092248	632909	75998	302204	4103358
All foreigners	Monuments, forts, palaces, museum	3432956	700287	82689	268258	4484190
	Hill stations, mountains, beaches, scenic places	428983	148385	20143	42647	640159
	Religious places	388534	73219	7390	8193	477335
	Medical treatment, yoga, meditation & spiritual healing	98774	19601	1775	1077	121228
	Others	281129	26030	4212	4771	316142
	Total	4630376	967522	116209	324946	6039054

Source: NCAER's computation using IPS data