


Study on Tourism in Overseas Market of Russia

Final Report – Russia

For

Market Research Division
Ministry of Tourism
Government of India

सत्यमेव जयते
Government of India


nielsen

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Executive Summary

E1. The foreign tourist arrival growth in India is little more than 10% per annum (2014) & in terms of figures of FTA – Foreign tourist arrival, India received around 7.68 million foreign tourists in 2014. Though the share of FTAs from Russia to India is moderate to high (2,70,000 FTAs from Russia to India in 2014) owing to the strong relationship between the two countries, a vast opportunity lies untapped in the form of outbound travellers in the Russia market. Considering the tremendous potential to attract foreign tourist, The Ministry of Tourism, Government of India has taken lot of innovative steps in terms of promotion and market development activity. To get a better understanding, Ministry of Tourism commissioned a study to gauge the perception of tourists—past as well as prospective—in selected foreign markets about tourism in India. This study-report attempts to assess the impact of the ongoing overseas campaign launched by the Ministry of Tourism, Government of India, to promote India as a high-value, up-market tourist destination. The Ministry of Tourism also intends to use the insights from this study as inputs in designing future overseas campaigns.

E2. The report covers an in-depth insight of the traveller's demographic profile, level of awareness about India & its different products & services, preference & attitude, like & dislike & finally lead to arrive need-gap of the past travellers. The report has dealt with the different promotional strategies adopted by the competitive countries & what is the take away out of it & what best India tourism can offer to attract tourist from the target market. Government of India has set up India Tourism offices in different countries to facilitate intending travellers by way of providing required information so that they can plan accordingly. The study also covers the traveller's perception as well as experience to deal with those establishment & suggestion for improvement.

E3. The entire study has been carried out by way of extensive secondary research followed by face to face interviews with the help of local office of The Nielsen Company. The categories of respondents are pas and prospective outbound tourists, travel houses.

India has for long been known for its rich culture and heritage beautiful and artistic historical monuments, cuisine with traditional Indian spices and herbs, pocket friendly rates, breath-taking natural beauty and a wide range of tropical beaches. Given the fact that India and Russia share a strong relationship since India’s freedom, awareness among Russian nationals about India is very high.

E4. For holidaymakers from Russia, India is a long haul destination. On virtue of having friends and relatives visit India, they have knowledge of select destinations that are popular in Russia. Russian past travellers to India on a package tour has spent around INR 3 lakh per person on an average while past travellers to India on a non-package tour has spent around INR 1 lakh per person on an average . Most of the past travellers visited India to see and experience the heritage and culture of the country. The most fascinating things to them were to enjoy the rich heritage, cultural diversity, scenic beauty & religious places in India.

E5. All the past travellers are aware about India through websites / internet and friends and relatives who have visited India, but the promotional /publicity material available at various forums are not helping to plan their travel as their requirement of customized travel plans are often not addressed. The awareness of India is not getting converted to travels to India. ***Incredible India*** website needs to be more focussed, product driven and clear so that travellers can decide their destination and can compare the benefit to visit India vis-à-vis other competitive countries. The Campaign should be focused in conveying to the intending travellers that they are “Welcome to India “rather than simply describing India. Rather than marketing India or just one state to the trade, focus should be on marketing a product /activity/ event. Under the umbrella of brand India new tourist circuits need to be created to attract different type of travellers. Thus there is need to focus separately for the 3 different stakeholders;

E6. Trade/ Tour Operator:

Focussing on trade and forming a symbiotic relationship with trade will foster a greater number of foreign tourist visits to India. It is also suggested that more liaising with Russian tour operators and training them about Travel in India are facilitated by the India Tourism Officer in Russia so as to increase the tourist traffic to India. It is also suggested to improve the number of tour operators who sell India by providing free training and tutorials for tourism in India by Ministry and motivate them to work for 'India Tourism Office'. India Tourism Office must project a permanent person in Russia who can be contacted for any information on India. India's participation in important fairs and festivals is required where they can sponsor any event which will finally send a message to "*Welcome to India"*. More communication with tour operators is required with regards to events that can be organized to boost tourism to India. Regular updates to trade should be done regarding visa rules, changes in any rules and regulations in India, new destinations, new property, new facilities, etc. so that the constant information flow is present amongst the trade from the Indian Tourism Office.

E7. Media:

Media is a medium that can be used to make people aware about India. Media reaches the masses and hence is a very important tool of promotion. Currently the advertisements of Incredible India campaign are not present. Also the Local channels in Russia, which are most watched by the potential travellers are not showing India Tourism advertisements. The media advertisements need to focus on the various products that India has to offer assuring that India is a safe and secure country to visit and can also showcase the unique blend of modern and traditional experiences that India has to offer. Media can also take the help of Russian celebrities and famous personalities to promote India.

E8. Traveller:

More efforts need to be put in creating promotional campaigns which will increase footfalls of travellers to India. In order to attract intending travellers as well as past travellers (for repeat visit) - a comprehensive plan with lots of stimulus is essential. Maps, guidebooks and brochures needs to be present in Russian. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website. Promotional campaigns in local language should address the information gaps that are currently present so as to increase travellers interest in India and also to remove unfounded fears regarding travelling to India.

E9. Short Term Measures:

- Incredible India advertisements in local language on TV and popular social media
- India tourism brochures, maps and guidebooks in the local language
- Inclusion of staff of the India Tourism Office in Russia who can be contacted by travellers and trade for any queries and enquiries
- Feature Incredible India advertisements on social media
- Organize India nights and food festivals regularly so as to pique interest of Russian travellers about India
- Training and providing certified Russian speaking guides in various cities of India
- Impart training to front office executives who are in direct contact with prospective travellers so as they can handle all types of queries
- No publicity material is there, there is no mention about New India – new destinations, new products, new packages, new circuits and new luxury properties need to be promoted alongside well known destinations, so as to offer a large choice in front of prospective travellers.
- Frequent interaction with tour operators – to remain connected.

E10. Long Term Measures:

- More focus on product /destination campaigns required for different set of travellers. Products for specific countries should be designed based on the needs and requirements of travellers from that specific geography.
- Rather than sending brochures etc., fortnight updates though e-newsletters on what is happening NEW in India –event, launch, festival etc.
- Design advertisements with celebrities of the target country to lend trust and credibility to the promotional advertisement.

Chapter One
About The Study

1.1 Introduction

In recent years the tourism sector in India has registered significant growth and has tremendous potential in terms of its contribution to national income and employment. The Ministry of Tourism, Government of India has been making sincere efforts to promote and publicise India as a high value up market destinations.

In order to have an objective assessment of the overseas campaign and to know the perception, level of knowledge and expectation /aspiration of foreign tourists about India the Ministry of Tourism, Government of India has decided to conduct an Survey /study in a few selected foreign markets to have an assessment of the impact of the campaign on the foreign travellers in the overseas markets.

This study-report attempts to assess the impact of the ongoing overseas campaign launched by the Ministry of Tourism, Government of India, to promote India as a high-value, up-market tourist destination. The Ministry of Tourism also intends to use the insights from this study as inputs in designing future overseas campaigns.

1.2 Terms of Reference

To conduct a study on tourism in the overseas markets of Germany, Japan, Russia, South Africa, South Korea and Turkey. The study will include a primary survey of past and prospective travellers besides compilation and analysis of information from secondary sources. Based on the secondary research and primary survey of respondents, separate report of each country should provide detailed information on the following aspects:

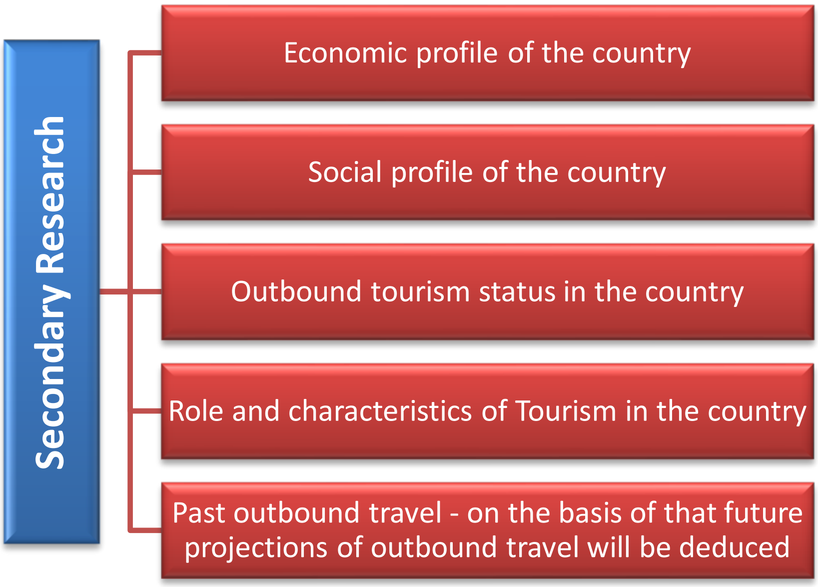
- Market/ country overview-Economic and social profile
- Outbound travel pattern in past
  - Travellers' profile
  - Preferred destinations

- Expenditure pattern
- Travellers to India

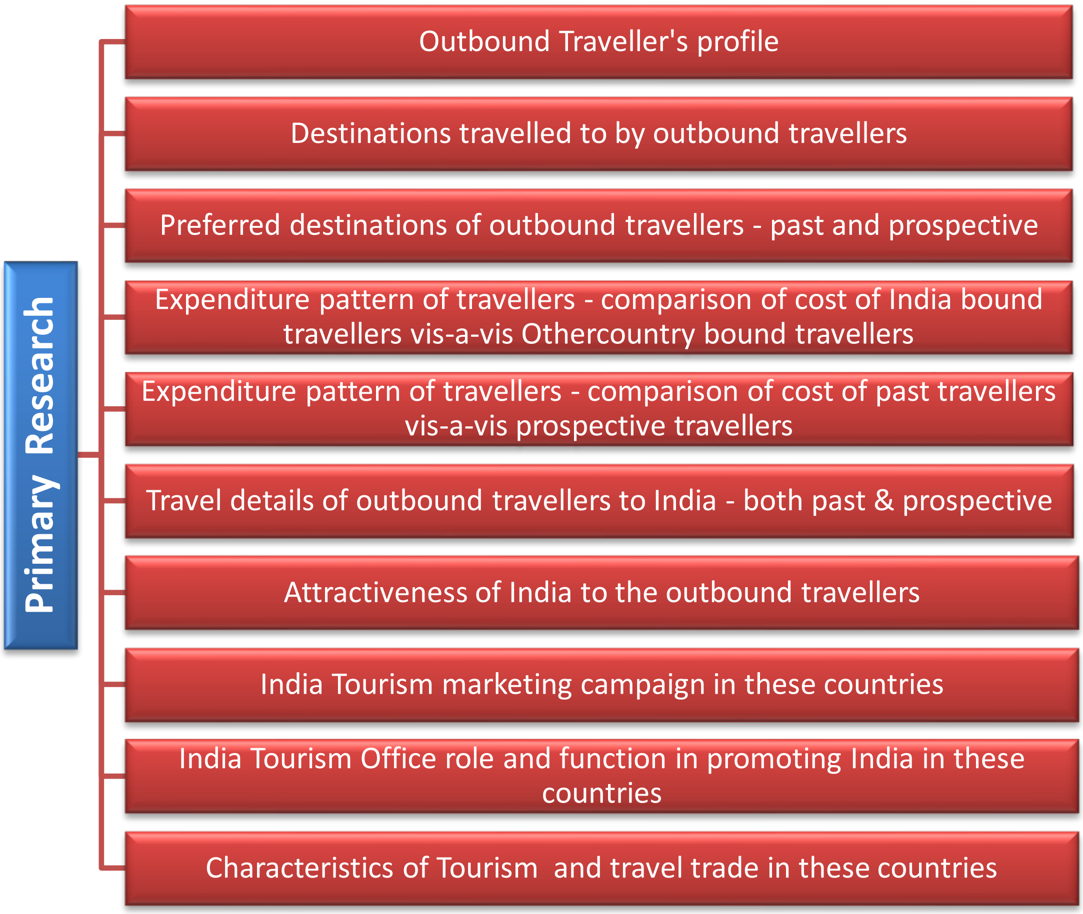
- Projections of future outbound travel
- Role and characteristics of tourism and travel trade in these countries
- Attractiveness of India for visitors from these countries
- India tourism marketing and promotion in these countries
- Suggestion of specific measures to promote India tourism in these countries. The role of India Tourism Offices in these countries in such promotional activities should also be elaborated.

1.3 Research Approach & Methodology

The research approach included both secondary and primary research. Both desk and primary research was imperative in the task of achieving the objective of the study. The information areas that were covered through secondary research are listed below.



The information areas that were covered through primary research are listed below.



The various stake holders involved in this study were different for the different categories of respondents. The consolidated list of stake holders and the roles they played to help make this study achieve its objective, are as follows:

Table 1: List of Stakeholder, Particulars and Roles

Stake Holders	Particulars	Role to Play
Travellers	This sector includes past outbound travellers as well as potential travellers planning to travel in the next one year. The breakup of these travellers are: ▪ Persons who have travelled abroad in last one year to India ▪ Persons who have travelled abroad in the last one year to other countries but not India ▪ Persons who intend to travel abroad in near future and	The travellers provided information on the following: ▪ Outbound Traveller's profile ▪ Destinations travelled to by outbound travellers ▪ Preferred destinations of outbound travellers ▪ Expenditure pattern of travellers ▪ Travel details of outbound travellers to India ▪ Attractiveness of India to the outbound travellers

Stake Holders	Particulars	Role to Play
	specifically to India ▪ Persons who intend to travel abroad in near future to other countries but India	▪ India Tourism marketing campaign in these countries
Travel agents and Outbound Tour Operators	Travel agents and tour operators providing expertise in outbound travel options to travellers and prospective travellers	The tour operators provided information on the following: ▪ Preferred destinations of outbound travellers ▪ Attractiveness of India to the outbound travellers ▪ India Tourism marketing campaign in these countries ▪ Characteristics of Tourism and travel trade in these countries
Indian Tourism Offices	Indian Tourism Ministry Office officials who provide help and information to persons interested in traveling to India	The Indian Tourism Officials provided information on the following: ▪ India Tourism marketing campaign in these countries ▪ India Tourism Office role and function in promoting India in these countries ▪ Characteristics of Tourism and travel trade in these countries

1.4 Sample Size

The sample for the travellers that was to be interviewed in the main survey has been specified as 3000 by the Market Research Division, Ministry of Tourism.

Table 2: Sample Size Distribution

Country	Category of Respondents				Total
	Persons who Travelled Abroad in last One Year		Persons who have not gone abroad yet but intend to travel in near future		
	To India	To Other Countries	To India	To Other Countries	
Russia	1000	1000	250	750	3000

The above sample was distributed – 50% face to face and the balance 50% online.

Additionally, Nielsen executives from New Delhi office interviewed 25 outbound Tour Operators and travel agents from Russia. Apart from the above mentioned samples, Nielsen executives from New Delhi office also conducted face-to-face In-Depth discussions with officials from the India Tourism Office in Russia.

1.5 Coverage

Segments

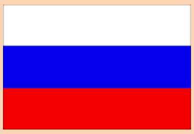
The following segments were covered by the study in Russia:

- Outbound Tourists
- Travel houses: major ones across various cities in proposed countries as well as Indian travel houses who have overseas counterparts to attract tourists into India
- Indian tourism office in Moscow/ Indian Embassy India Travel Desk

The country is rich in cultural heritage and wildlife, and hence, has numerous tourist attractions and destinations. The following major tourist locations in Russia were shortlisted in order to interview tourists with the desired profile for the study.

Table 3: Sample and Geographical Coverage

Country	Location	No. of Respondents	Sources Of Respondents	Hit Rate

Russia 	Moscow	2000	1. Our Local office in Moscow 2. Local directory (2010) 3. Local tour operators (990)	Nielsen contacted 5200 respondents to achieve 3000 interviews
	St. Petersburg	1000		
	Total	**3000**		

Apart from interviewing tourists at these destinations, officials from Indian tourism offices and outbound tour operators were also interviewed to gather more information regarding travel patterns of international tourists and their perception and inclination towards travelling to India.

1.6 Method of Inquiry

Different modes of enquiry were followed for the various respondent categories as follows

- **For inhabitants of Russia / local population** – Direct face-to-face interviews and telephonic interviews, using the questionnaires provided
- **For tour operators** – Direct face-to-face interviews using the questionnaires provided
- **For Indian Tourism Offices** – Face-to-face discussions with an aim to get an idea about the promotional measures undertaken

1.7 Conduct/ control of field operations in different location

The primary survey was conducted in association with the local Nielsen offices at the various locations. Research professionals from Delhi supervised the field operations to maintain quality of the data being collected.

1.8 Data analysis, quality control measures

Analysis of data was primarily conducted on SPSS (Statistical Package for Social Sciences). Frequency and cross tabulation analysis were conducted as required. Segmentation of the entire sample of travellers was carried out on SPSS using parameters like traveller's age, occupation, education, annual income, last expenditure of abroad visit, etc. in order to give a detailed description of the travellers' profile.

Chapter Two

About The Country

2.1 Background – Russia

2.1.1 Introduction

Russia, also known as the Russian Federation, is a sovereign state in northern Eurasia. Russia is spread across 16,377,742 sq km of land and is the world's largest country in terms of land area. Russia is the largest country in the world, covering more than one-eighth of the Earth's inhabited land area. Russia is the world's ninth most populous country with over 144 million people at the end of 2015. Russia is spread across the entire northern Asia and much of Eastern

Europe. Russia shares land borders with Norway, Finland, Estonia, Latvia, Lithuania and Poland (both with Kaliningrad Oblast), Belarus, Ukraine, Georgia, Azerbaijan, Kazakhstan, China, Mongolia, and North Korea. It shares maritime borders with Japan by the Sea of Okhotsk and the U.S. state of Alaska across the Bering Strait. Russia has eleven times zones and has a wide range of lad types and environment patterns.

The Russian economy ranks as the tenth largest by nominal GDP and sixth largest by purchasing power parity in 2015. Russia's extensive mineral and energy resources, the largest reserves in the world, have made it one of the largest producers of oil and natural gas globally. Russia is a great power and a permanent member of the United Nations Security Council, a member of the G20, the Council of Europe, the Asia-Pacific Economic Cooperation (APEC), the Shanghai Cooperation Organisation (SCO), the Organization for Security and Co-operation in Europe (OSCE), and the World Trade Organization (WTO), as well as being the leading member of the Commonwealth of Independent States (CIS), the Collective Security Treaty Organization (CSTO) and one of the 5 members of the Eurasian Economic Union (EEU), along with Armenia, Belarus, Kazakhstan and Kyrgyzstan.

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2.1.2 Social Profile

During the 19th century, Russia made territorial acquisitions in Europe and Asia. Defeat in the Russo-Japanese War of 1904-05 contributed to the Revolution of 1905, which resulted in the formation of a parliament and other reforms. Russian defeat in World War I led to widespread rioting in the major cities of the Russian Empire and to the overthrow in 1917 of the imperial household. The communists under Vladimir Lenin seized power soon after and formed the USSR. The rule of Stalin during 1928 till 1953 strengthened communist rule and Russian dominance of the Soviet Union. After defeating Germany in World War II as part of an alliance with the US (1939-1945), the USSR expanded its territory and influence in Eastern Europe and emerged as a global power.

The Soviet economy and society stagnated in the decades following Stalin's rule, until General Secretary Mikhail Gorbachev who introduced reforms in an attempt to modernize communism, but his initiatives inadvertently released forces that by December 1991 splintered the USSR into Russia and 14 other independent republics. Following economic and political turmoil during President Boris Yeltsin's term (1991-99), Russia shifted toward a centralized authoritarian state under the leadership of President Vladimir PUTIN (2000-2008, 2012-).

Russia's population is estimated at around 142 million making Russia the 10th most populous country in the world. The ethnic groups in Russia include Russian 77.7%, Tatar 3.7%, Ukrainian 1.4%, Bashkir 1.1%, Chuvash 1%, Chechen 1%, other 10.2%, unspecified 3.9%. 85.7% of the population in Russia speaks Russian Language, while Tatar is spoken by 3.2% of the population, Chechen by 1% and other languages by 10.1% of the population. Moscow apart from being the capital of Russia is also its largest city. Other major cities of Russia are Saint Petersburg, Novosibirsk, Yekaterinburg, Nizhniy Novgorod and Samara.[1]

2.1.3 Urban/ Rural Population

Russia is a majorly urbanized population with 74% of the total population (2015) living in urban areas. Major urban areas, with respect to population, are Moscow, Saint Petersburg, Novosibirsk, Yekaterinburg, Nizhniy Novgorod and Samara (2015). [2]

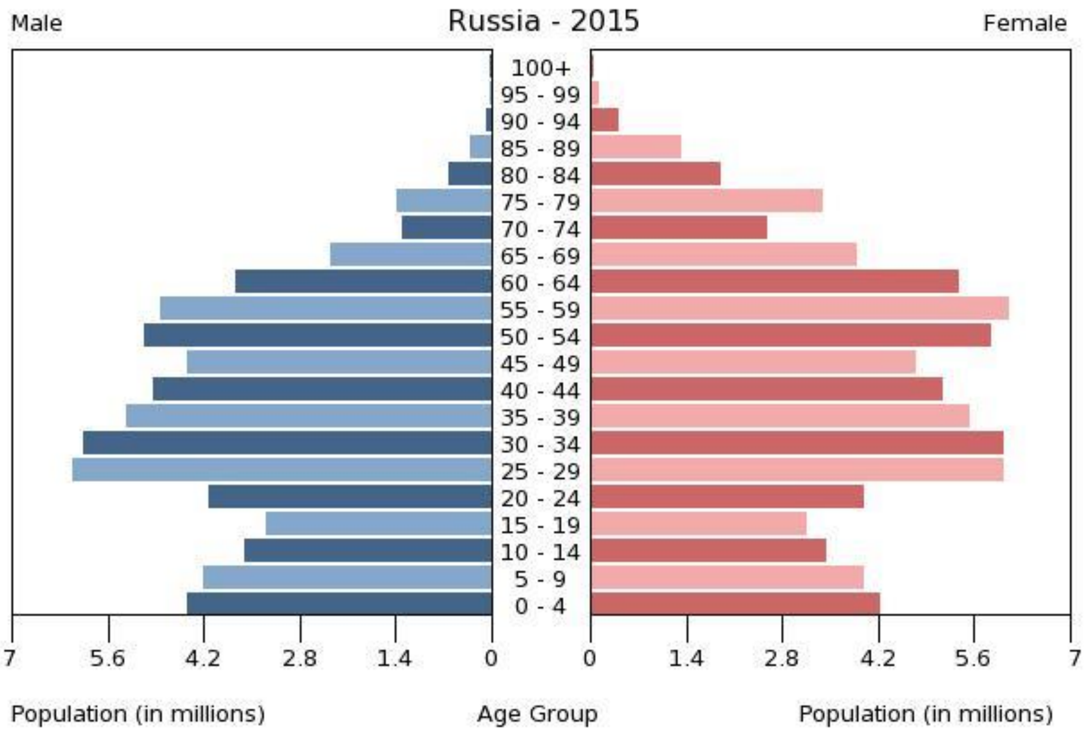
2.1.4 Gender Statistics

As per the World CIA Factbook, in 2015 the country's population was 142,423,773, of which 65,901,817 were male and 76,521,956 were female.

[1] Source: CIA World Factbook
[2] Source: CIA World Factbook.

The population distribution for Russia by gender and age groups are given as follows.[3]

Figure 1: Population distribution for Russia by gender and age groups



2.1.5 Prominent Religious Groups

As per the CIA World Factbook, Russian Orthodoxy is practiced by 15-20% of the population, Islam by 10-15% of the population, Christianity by 2% of the population and these estimates are of practicing worshipers; Russia has large populations of non-practicing believers and non-believers, a legacy of over seven decades of Soviet rule (2006 estimate). Russia officially recognizes Orthodox Christianity, Islam, Judaism, and Buddhism as traditional religions. [4]

2.1.6 Age Distribution

The age distribution of the population of Russia is presented in the Table below. The data presented below is based on the estimate of 2015.

Table 4: Age Distribution of Population

S. No.	Age Group	Percentage of	Male	Female

[3] CIA World Factbook

[4] Source: CIA World Factbook

		the Population	Population	Population
1	0-14 years	16.68%	12,204,992	11,556,764
2	15-24 years	10.15%	7,393,188.00	7,064,060
3	25-54 years	45.54%	31,779,688	33,086,346
4	55-64 years	14.01%	8,545,371	11,409,076
5	65 years and over	13.61%	5,978,578	13,405,710

2.1.7 Literacy

Literacy level in Russia is defined as people who can read and write above the age of 15. The total percentage of literates in Russia is 99.7% of the total population. The literacy levels amongst male population are also 99.7% and the literacy level amongst the female population is cited as 99.6% of the total population.[5]

2.1.8 Economic Profile

Russia has the 15th largest economy in the world by nominal GDP and the 6th largest by purchasing power parity (PPP). Since the turn of the 21st century, higher domestic consumption and greater political stability have bolstered economic growth in Russia. The country ended 2008 with its ninth straight year of growth, but growth has slowed with the decline in the price of oil and gas. A combination of falling oil prices, international sanctions, and structural limitations pushed Russia into a deep recession in 2015, with the GDP falling by close to 4%. Most economists expect this downturn will continue through 2016. Government support for import substitution has increased recently in an effort to diversify the economy away from extractive industries.

Russia is one of the world's leading producers of oil and natural gas, and is also a top exporter of metals such as steel and primary aluminum. Russia's reliance on commodity exports makes it vulnerable to boom and bust cycles that follow the volatile swings in global prices. Oil, natural gas, metals, and timber account for more than 80% of Russian exports abroad.[98] Since 2003, the exports of natural resources started decreasing in economic importance as the internal market strengthened considerably. Despite higher energy prices,

[5] Source: CIA World Factbook

oil and gas only contribute to 5.7% of Russia's GDP and the government predicts this will be 3.7% by 2011.[176] Oil export earnings allowed Russia to increase its foreign reserves from $12 billion in 1999 to $597.3 billion on 1 August 2008, the third largest foreign exchange reserves in the world.

Approximately 12.8% of Russians lived below the national poverty line in 2011, significantly down from 40% in 1998 at the worst point of the post-Soviet collapse. Unemployment in Russia was 5.4% in 2014, down from about 12.4% in 1999. The middle class has grown from just 8 million persons in 2000 to 104 million persons in 2013. However, after U.S.-led sanctions since 2014 and a collapse in oil prices, the proportion of middle-class could halve to 20%.[6]

2.1.9 Gross Domestic Product (GDP)

Russia's GDP (purchasing power parity) in 2015 (estimate) was US$ 3.471 Trillion. Russia ranks 7th in terms of country GDP in the world. The GDP growth rate for Russia (2015 estimate) is -3.9%. The PPP of Russia stands at US$ 23,700 (2015 estimate).[7]

Table 5: Estimated per capita GDP (purchasing power parity)

Year (est.)	USD
2015	US$ 3.471 Trillion
2014	US$ 3.612 Trillion
2013	US$ 3.59 Trillion
Source: https://www.cia.gov	

2.1.10 Per Capita Income/ Spending Power

Russia ranks 79th in the world with regards to purchasing power parity.

Table 6: Russia GDP (purchasing power parity)

Year (est.)	USD GDP Per capita (PPP)

[6] Source: Wikipedia
[7] Source: CIA World Factbook

2015	USD 23,700
2014	USD 24,700
2013	USD 24,500
Source: https://www.cia.gov	

2.2 Tourism Overview

2.2.1 General Overview

In 2013, Russia was visited by 28.4 million tourists; it is the ninth most visited country in the world and the seventh most visited in Europe. The number of Western visitors dropped in 2014. Russia contains 23 UNESCO World Heritage Sites, while many more are on UNESCO's tentative lists. The most visited destinations in Russia are Moscow and Saint Petersburg, the current and former capitals of the country. Moscow and Saint Petersburg are recognized as World Cities and they feature world-renowned museums as the Tretyakov Gallery and the Hermitage, famous theaters like Bolshoi and Mariinsky, ornate churches like Saint Basil's Cathedral, Cathedral of Christ the Saviour, Saint Isaac's Cathedral and Church of the Savior on Blood, impressive fortifications like the Kremlin and Peter and Paul Fortress, beautiful squares and streets like Red Square, Palace Square, Tverskaya Street and Nevsky Prospect. Rich palaces and parks are found in the former imperial residences in suburbs of Moscow (Kolomenskoye, Tsaritsyno) and St Petersburg (Peterhof, Strelna, Oranienbaum, Gatchina, Pavlovsk and Tsarskoye Selo). Moscow displays Soviet architecture at its best, along with modern skyscrapers, while St Petersburg, nicknamed Venice of the North, boasts of its classical architecture, many rivers, channels and bridges.

2.2.2 Inbound Travel

The value for International tourism, number of arrivals in Russia was 30,792,000 as of 2013. As the graph below shows, over the past 18 years this indicator reached a maximum value of 30,792,000 in 2013 and a minimum value of 10,290,000 in 1995. The following table depicts the inbound traffic or the international tourist arrivals in Russia.

Table 7: Foreign Tourist Arrivals

Year	International Tourist Arrivals[8]
2007	22,909,000
2008	23,676,000
2009	21,339,000
2010	22,281,000
2011	24,932,000
2012	28,177,000
2013	30,792,000
2014	32,421,000

China, Germany and the United States top the list of countries by the number of tourists who visited Russia in the first nine months of the year 2014, as per the Federal Tourism Agency said, referring to the Federal State Statistic Service. A total of 358,000 tourists from China, 318,600 from Germany, 150,600 from the United States, 120,900 from the United Kingdom, over 100,000 from Turkey and 92,600 from Italy visited Russia in that period. In terms of arrivals of their citizens in Russia in the first nine months of the year of 2014 were Ukraine (7.4 million), Kazakhstan (over 3 million), Uzbekistan (1.9 million), Poland (1.4 million) and Finland (over one million). [9]

2.2.3 Seasonality of Tourism

The Russian winter season has a whole host of holidays which can be confusing to visitors. Many people in Russia regularly celebrate four different holidays between the end of December and the middle of January. The New Year and Orthodox Christmas holidays in Russia starts from January 1st and end on January 7th every year and hence is holiday season for Tourists and locals in Russia.

[8] Source: World Bank & http://www.indexmundi.com/facts/russia/international-tourism
[9] Source: http://rbth.com/news/2014/12/04/china_germany_us_top_russias_inbound_tourism_statistics_in_2014_41958.html

2.2.4 Outbound Travel

The Russian outbound tourist flow decreased by 31.3 percent last year, the largest drop in 18 years, citing the Russian Tourism Industry Union. A total of 12 million international trips were made by Russians in 2015, however before 2015, the sharpest drop in outbound tourism was registered in 1998, when the number of Russian tourists traveling abroad dropped by 24.4 percent when compared to the preceding year. The Russian Tourism Industry Union believes 2015 was the most difficult year in the history of the private tourism business in Russia, which has made the tour companies in Russia considerably reduce the volume of their business. In 2014, the outbound tourism in Russia shrank 4 percent compared to the previous year. The decline in the number of Russian tourists traveling abroad resulted from the weakening of the Russian currency as well as the ban on flights to Russia's two most popular international tourist destinations — Turkey and Egypt.

Among the hardest hit by the drop of tourist flow from Russia in 2015 was Indonesia, which saw 96.6 percent less Russian tourists, Tunisia that saw the 83 percent reduction in the number of Russian tourists and Dominican Republic that was visited by 82.5 percent less Russian travellers last year. In Europe, the sharpest decline in the number of travellers from Russia - 48 percent- was registered in Greece. Greece is followed by Bulgaria, Spain and Croatia that saw Russian tourist flow drop by 41 percent in 2015[10].

The value for International tourism, number of departures in Russia was 54,069,000 as of 2013. As the graph below shows, over the past 18 years this indicator reached a maximum value of 54,069,000 in 2013 and a minimum value of 10,635,000 in 1998.

Table 8: Departure

Year	Departures[11]
2007	34,285,000
2008	36,538,000
2009	34,276,000

[10] http://www.themoscowtimes.com/business/article/russian-outbound-tourism-suffers-sharpest-drop-since-1998/562018.html
[11] Source: http://www.indexmundi.com/facts/russia/international-tourism

2010	39,323,000
2011	43,726,000
2012	47,813,000
2013	54,069,000

2.2.5 Preferred Outbound Destinations

Preferred destinations for travellers from Russia are Turkey, Egypt, Dubai, Cyprus, Bulgaria, Spain, etc. In India, Goa has been given the most preferred destination for Russian tourists based on data indicating that the inflow of tourists from Russia to Goa is growing steadily. In 2013, Goa had 1,62,746 tourists from Russia whereas in 2012 the figure was 1,40,100. The growth is high, in comparison to 2010, where Goa registered just 57,623 tourists from Russia.[12]

2.2.6 Domestic Tourism in Russia

31,690,000 Russians travelled inside Russia in 2009 and this number increased up to 32,500,000, persons in 2010. Though the demand for tourist trips around the country among Russians increases, but rising prices for transport and hotels prevent expansion of geography of tourist flows. The comfortable high-speed trains to Germany are cheaper than to drive the same distance in a reserved seat in Russia. To stay overnight at a hostel in the high season is comparable to the price of staying in 4-5 star Turkish hotels. Only rising real incomes and the growth of travel prices to overseas resorts associated with fuel surcharges, as well as an improvement of facilities of these resorts are fuelling the growth of domestic tourism in Russia. In addition, statistics on domestic tourism flows, not adjusted.[13]

2.3 Travel & Trade

[12] Source: http://www.heraldgoa.in/The-Sunday-Roundtable/goa-most-preferred-destination-for-russians/63219.html

[13] Source: http://repositorio.upct.es/bitstream/handle/10317/3584/tfm299.pdf?sequence=1

2.3.1 Introduction

The United Nations World Tourism Organization (UNWTO) predicts that international tourism arrivals will grow by 3.3 percent per year between 2010 and 2030 and reach 1.8 billion total arrivals by 2030. Growth in emerging countries is expected to be twice as fast as in advanced ones. Tourism's market share in emerging countries is predicted to rise to 57 percent by 2030, compared to 47 percent in 2012. The challenge of how to direct the economic benefits of tourism to the world's poorest areas and populations, however, remains.

While growing affluence and falling real travel costs have been primary reasons for the surge in post-1970s international travel, changes in government travel policies have also played an important role. The weakness and potential volatility of many currencies against the US dollar and a deep recession in Russia, a key outbound market, will slow outbound spending in line with slower world trade overall in 2015. However, falling oil prices will bring significant improvements for net oil importers in 2015, easing upward pressure on living costs, increasing disposable household incomes and domestic consumer spending, and lowering air fares. As a result, Travel & Tourism expansion is forecast to continue at a stronger rate than last year, with the total contribution to GDP expected to increase by 3.7%. New destinations and investment opportunities will also continue to emerge as tourism becomes increasingly affordable across the developing world. This growth will require countries to adopt a concerted and coordinated approach to talent planning and development between their industry, governments and educational institutions to ensure they fulfil their potential in the years ahead.

2.3.2 Role and characteristics of tourism and travel trade in the country

The direct contribution of Travel & Tourism to GDP was RUB1,060.5bn (1.5% of total GDP) in 2014, and is forecast to fall by 5.2% in 2015, and to rise by 3.1% pa, from 2015-2025, to RUB 1,358.5bn (1.5% of total GDP) in 2025. The total contribution of Travel & Tourism to GDP was RUB 4,356.9bn (6.0% of GDP) in

2014, and is forecast to fall by 6.3% in 2015, and to rise by 3.0% pa to RUB 5,507.8bn (6.3% of GDP) in 2025. In 2014 Travel & Tourism directly supported 982,500 jobs (1.4% of total employment). This is expected to fall by 0.8% in 2015 and rise by 0.5% pa to 1,024,000 jobs (1.5% of total employment) in 2025. In 2014, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 5.6% of total employment (3,961,000 jobs). This is expected to fall by 2.0% in 2015 to 3,880,500 jobs and rise by 0.2% pa to 3,977,000 jobs in 2025 (6.0% of total). Visitor exports generated RUB 735.4bn (3.5% of total exports) in 2014. This is forecast to fall by 2.7% in 2015, and grow by 4.9% pa, from 2015-2025, to RUB 1,153.3bn in 2025 (4.4% of total). Travel & Tourism investment in 2014 was RUB 396.0bn, or 2.7% of total investment. It should fall by 17.4% in 2015, and rise by 3.6% pa over the next ten years to RUB 467.3bn in 2025 (2.9% of total).[14]

2.3.3 Flight connectivity (major airlines, flights from all major airports to India)

At present India has 12 international airports. These are Amritsar, New Delhi, Guwahati, Ahmedabad, Kolkata, Mumbai, Hyderabad, Goa, Chennai, Bengaluru, Cochin and Thiruvananthapuram. With the exception of Delhi and Amritsar which get severely fog-bound from mid-December to February, causing endless flight delays and cancellations; the remainder stay operational through the year. The age-old fog problem can be resolved with the use of a category III C instrument landing system (ILS), but Delhi as of now has only a Category II ILS, and Amritsar is to be upgraded to a Category II ILS.

All leading international airlines including KLM, Lufthansa, British Airways, Emirates, Cathay Pacific etc. operate into and out of India. Many of these airlines have hired Indian nationals to serve on board as cabin crew, to cater to passengers who may not even know any other language other than their own. Most long-haul international flights leave India in the early hours of the morning, so as to reach the destination airports during the daylight hours in those countries.

[14] Source: https://www.wttc.org/-/media/files/reports/economic%20impact%20research/countries%202015/russianfederation2015.pdf

Russia has a total of 270 airports, with 19 international airports. The 19 international airports are as follows.

International Airports in Russia	
Name	**Location**
Adler/Sochi Airport	Sochi
Arkhangelsk Airport	Arkhangelsk
Chita Airport	Chita
Domodedovo Airport	Moscow
Irkutsk Airport	Irkutsk
Kazan Airport	Kazan
Khrabrovo Airport	Kaliningrad
Koltsovo International Airport	Ekaterinburg
Kurumoch Airport	Samara
Novyy Airport	Khabarovsk
Pashkovsky Airport	Krasnodar
Pulkovo Airport	St Petersburg
Rostov Airport	Rostov
Sheremetyevo Airport	Moscow
Tolmachevo Airport	Novosibirsk
Ufa International Airport	Ufa
Vladivostok Airport	Vladivostok
Vnukovo Airport	Moscow
Yakutsk Airport	Yakutsk

Nearly all major airlines and airports offer flights to Russia. The country's own leading airline, Aeroflot serves a broad range of international destinations. Other airlines that connect India to Russia are Air Arabia, Air Astana, Air France, Air India, Etihad Airways, Flu Dubai, Qatar Airways and Turkish Airlines. There are direct flights between India and Russia between Delhi to Moscow. Besides this, there are indirect flights connecting the metros of India and other cities of Russia.

2.3.4 Flight Prices (relative prices of travelling to India and other countries)

Since Airlines are global, flight costs to India are highly competitive, particularly, the lower end tickets.

Table 9: Flight Prices

Fare in Indian rupees for travel from top India destinations to Moscow, as on May 9, 2016	
Moscow	
(Indian Rupees)	Lowest prices
Mumbai	32,680 (Indirect. Multiple airlines)
Delhi	36,149
Source: http://www.skyscanner.in	

2.3.5 Hotel Prices

The hotel prices as on March 21, 2016 are presented in the table below.

Table 10: Hotel Prices

Relative prices of hotels in India and other countries (March 31, 2016)	
Country	Price Range (for a night)
India (Delhi)	Rs. 329 to Rs. 33,527
Thailand (Bangkok)	Rs. 323 to Rs. 76,421
South Africa (Johannesburg)	Rs. 701 to 18,592
Canada (Ottawa)	Rs. 1551 to 16,501
USA (New York City)	Rs. 2480 to Rs. 64,897
South Korea (Seoul)	Rs. 1144 to 44,346
UK (London)	Rs. 1399 to 118,841
Japan (Tokyo)	Rs. 1669 to 82,643
Turkey (Istanbul)	Rs. 1572 to 37,392
Germany (Berlin)	Rs. 643 to 19,532

Russia (Moscow)	Rs. 237 to 40,071
Source: http://www.skyscanner.in	

Chapter Three

Past Outbound Travellers – Survey Findings

3.1 Past Outbound Travel Behavior

3.1.1 Profiling Information

3.1.1.1 Place of Residence

The survey investigated 2000 respondents (persons who have travelled abroad in the last one year) from Russia of which 63% of the travellers were from the capital Moscow and 37% from Saint Petersburg.

Figure 2: Distribution of Past Travellers by Place of Residence

Map Source: Russiamap.facts.co

3.1.1.2 Age categories

33% of the respondents were in the age group of 36 to 50 years. 45% of the respondents were between 26 to 35 years of age. Overall, 78% of the respondents were in their peak productive years between 26 and 50 years of age.

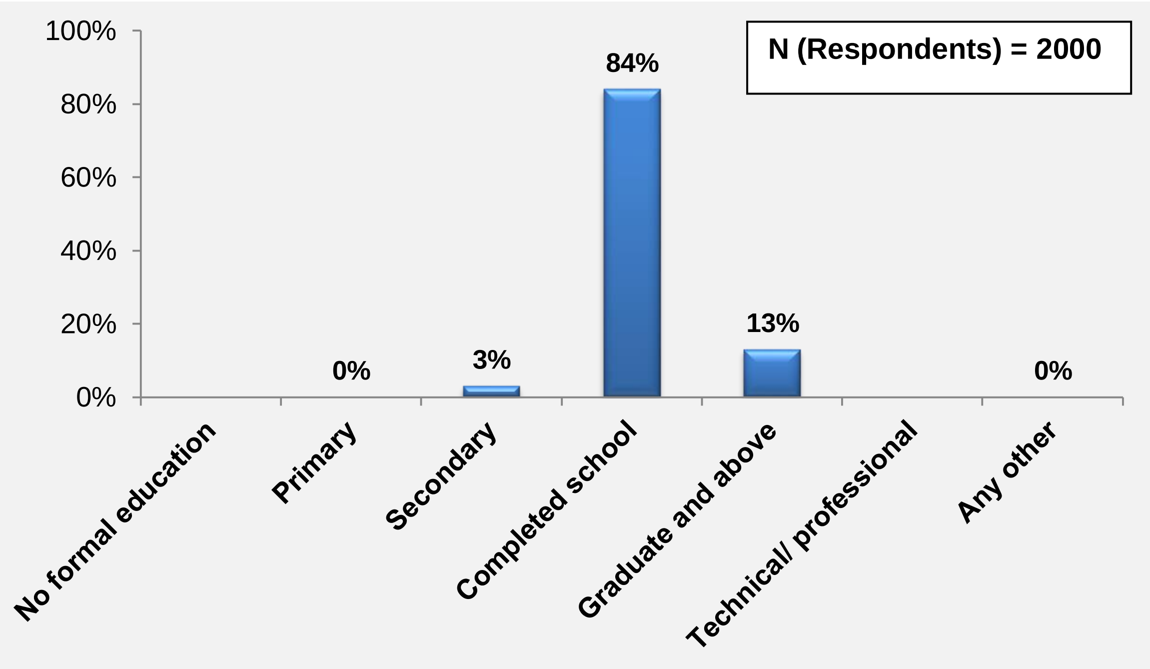
Table 11: Age Distribution

Age categories	No. of respondents	Percentage
Below 18 yrs	0	0%
18-25 yrs	320	16%
26-35 yrs	915	45%
36-50 yrs	655	33%
51-60 yrs	110	6%
Above 61 yrs	0	0%
Total	**2000**	**100%**

3.1.1.3 Educational Qualification of Respondents

84% respondents mentioned that they had completed school while 13% respondents out of the total 2000 past travellers to India and other countries mentioned that they had graduation degrees.

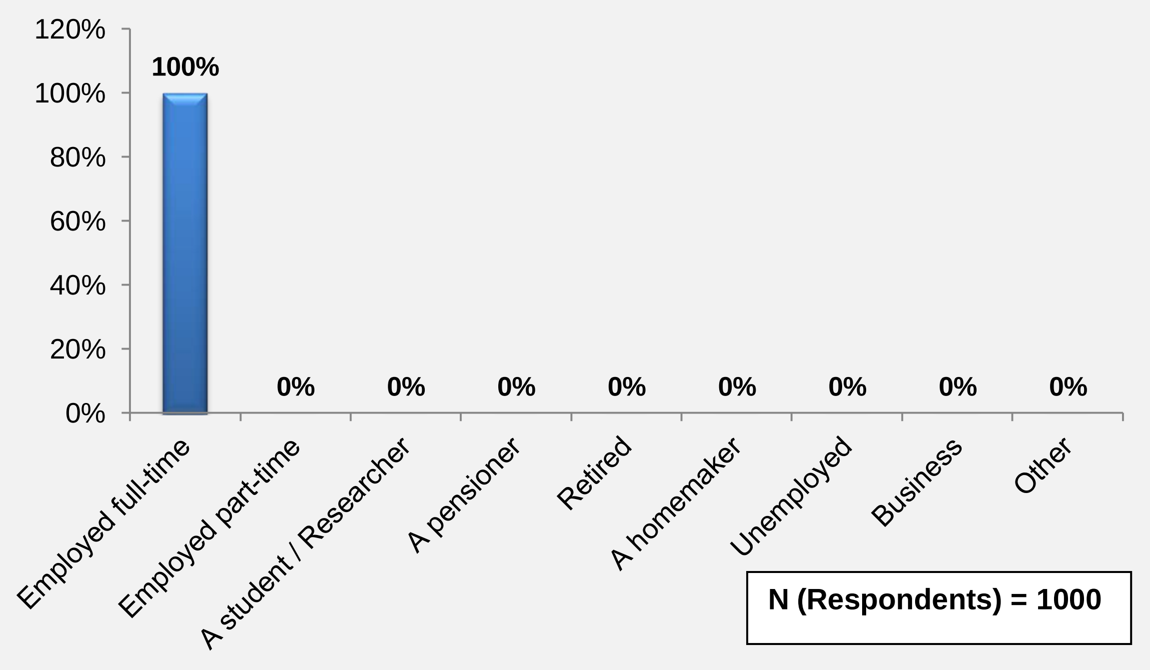
Figure 3: Educational Qualification of Respondents



3.1.1.4 Employment status of Past Travellers to India

100% respondents were employed full time.

Figure 4: Employment Status of Respondents



3.1.1.5 Gender

Women constituted about 12.5% of the survey participants. Overall, 250 women (past travellers) were interviewed during the primary survey across the six cities.

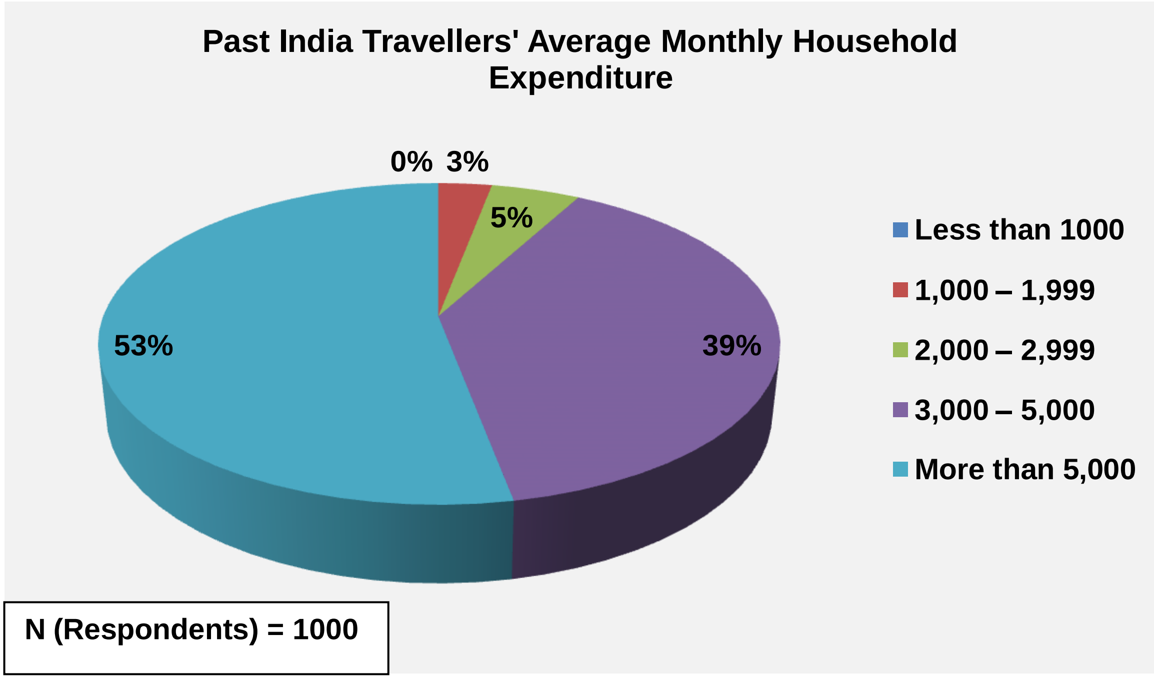
Table 12: Gender Distribution

Gender	No. of respondents	Percentage
Male	1750	87.5%
Female	250	12.5%
Total	**2000**	**100%**

3.1.1.6 By Average Monthly Household Expenditure of Past Travellers to India

39% of the respondents were in the monthly household expenditure category of USD 3000 – USD 5000. Those in higher monthly expenditure categories of > USD 5000 were 53%.

Figure 5: Categorizing Past India Respondents by monthly household expenditure in US$

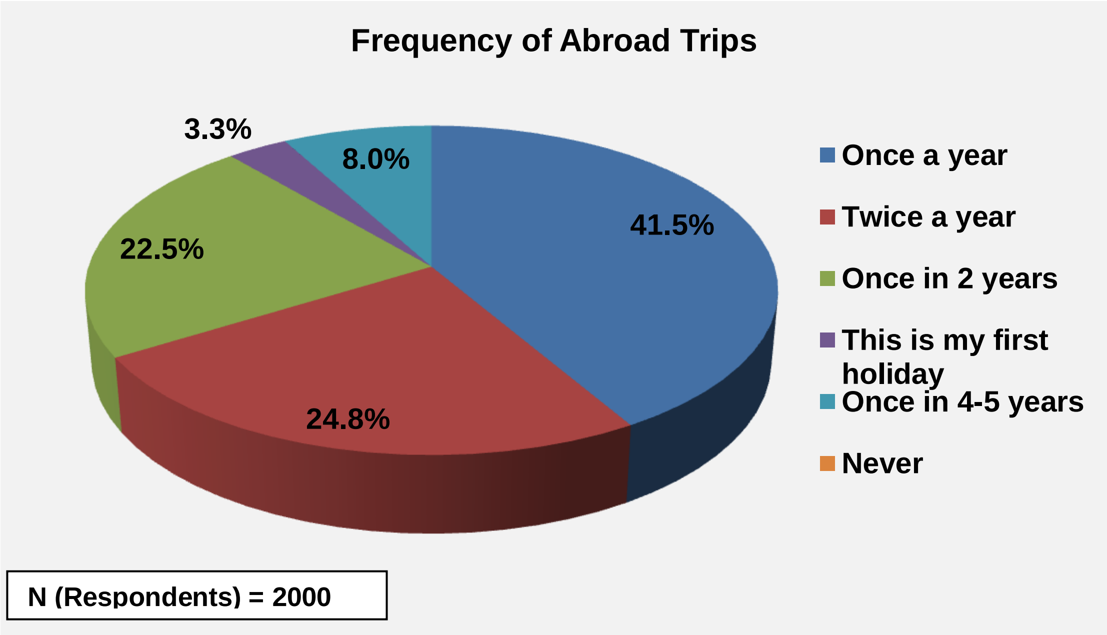


3.1.2 General Travel Behaviour

3.1.2.1 Frequency of trips abroad

Of the 2000 persons surveyed, 41.5% travel once a year. A substantive 24.8% travel several times in a year. 22.5% of respondents travelled once in two years.

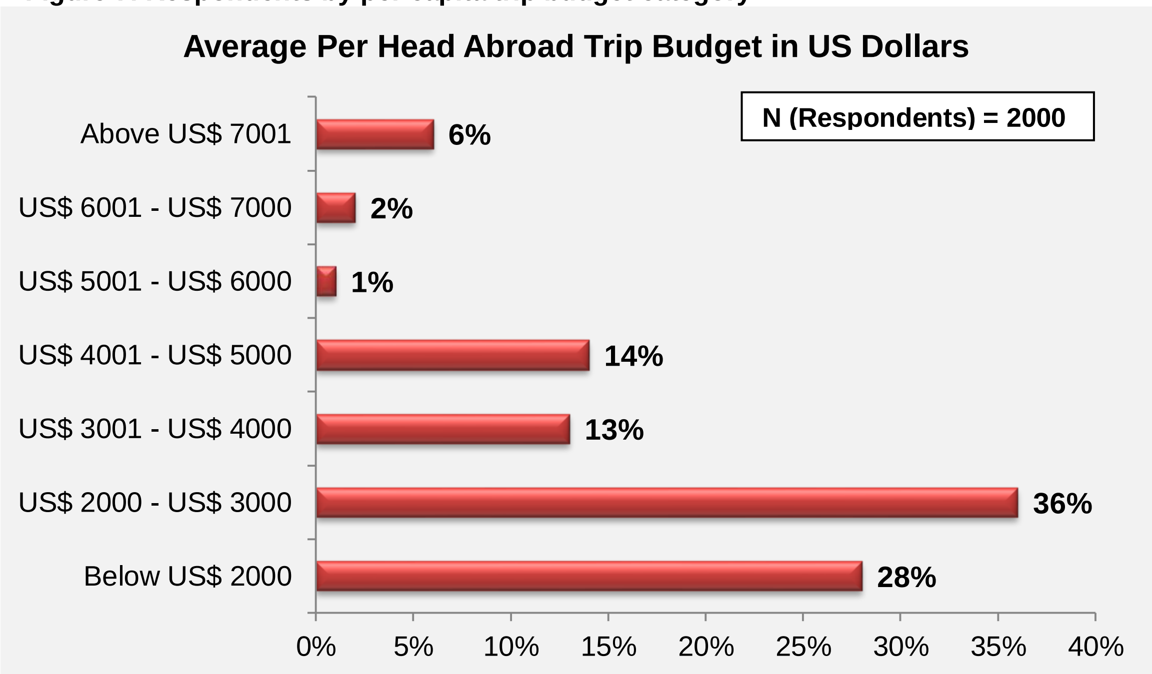
Figure 6: Respondents categorized by frequency of trips abroad



3.1.2.2 Average expenditure on trips

14% of the total 2000 travellers surveyed had a trip budget of US$ 4001 – US$ 5000 per head for a foreign trip. Another 13% budgeted in the range of US$ 3001– US$ 4000 per traveller. 6% of the respondents had an average budget of over US$ 7001 per head for an overseas trip.

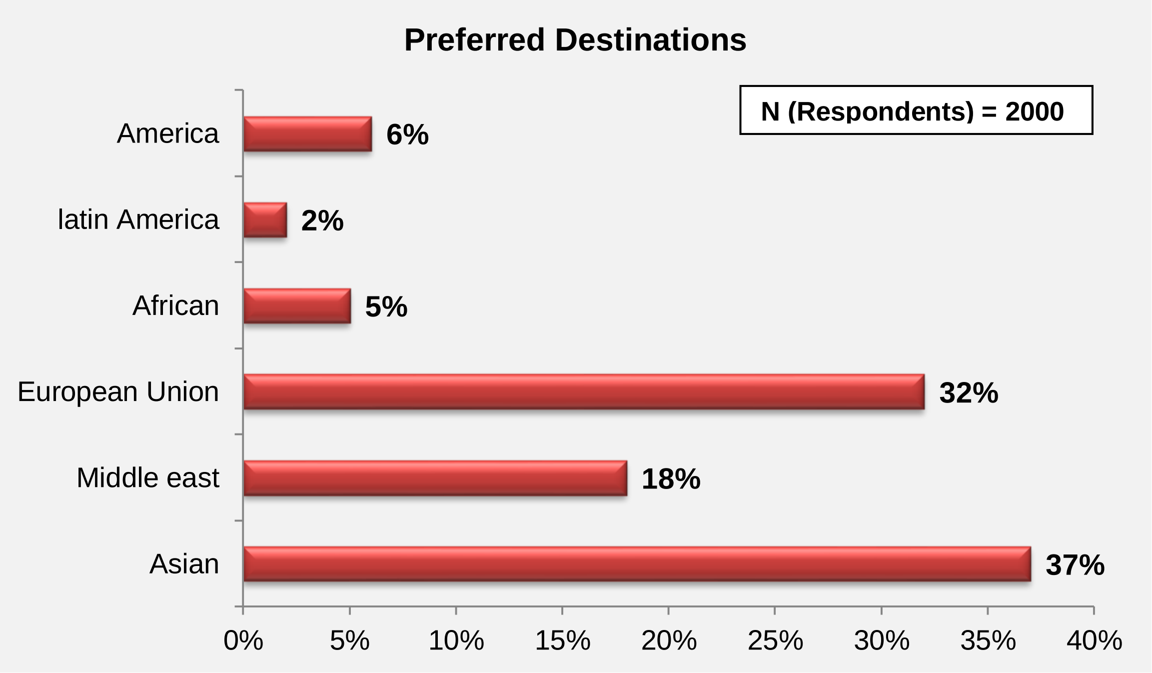
Figure 7: Respondents by per capita trip budget category



3.1.2.3 Preferred destinations

Respondents were asked to indicate their preferred foreign destinations for trips. In this analysis it was found that 37% of the responses were in favour of Asian destinations while another 32% responses showed in the inclination for EU. Of the 2000 responses received from 2000 respondents, 6% were in favour of countries in the North American continent while 5% respondents showed preference for African countries.

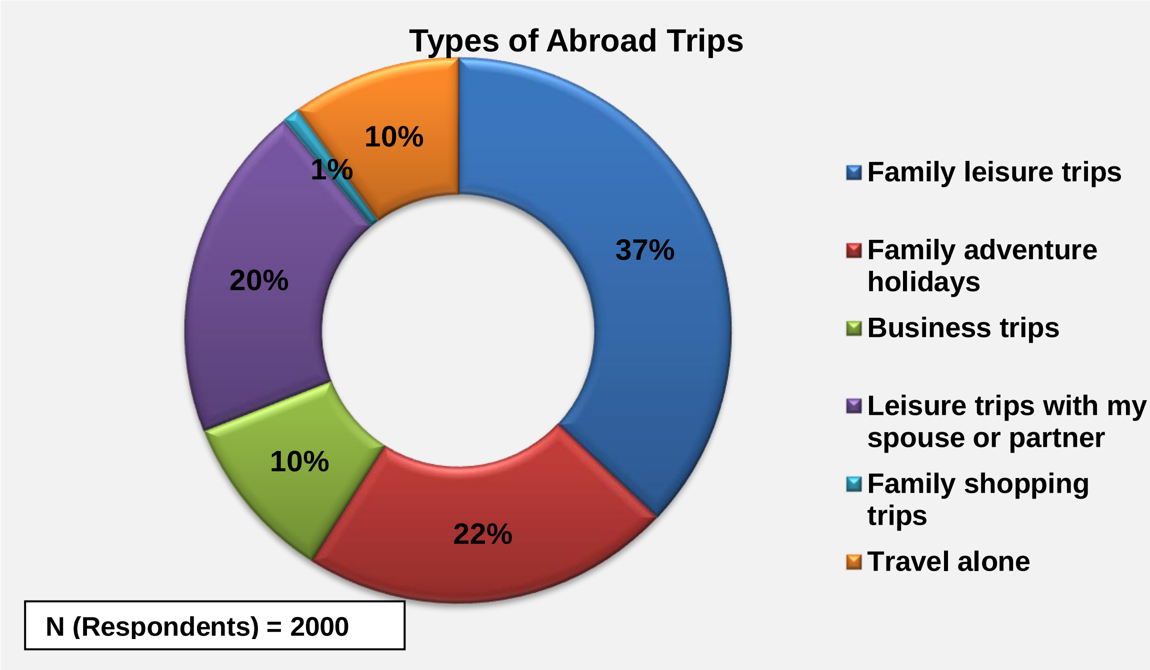
Figure 8: Revealed preferences for foreign destinations



3.1.2.4 Types of trip

37% of all 2000 respondents described their overseas trips in the last one year as family leisure trips. Around 10% claimed that they had travelled on business trips. 22% also enjoyed adventure holidays with their families. 20% of the total 2000 respondents claimed that they went on a leisure trip with their spouse or partner.

Figure 9: Respondents categorized by frequency of trips abroad



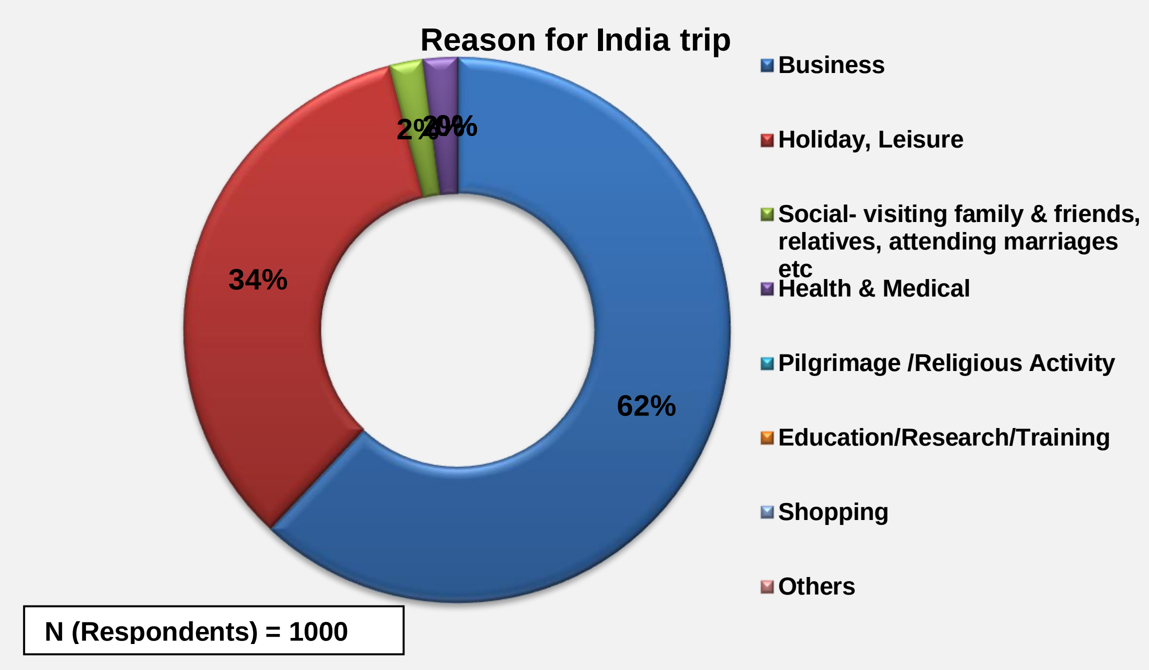
3.1.3 Travel Behaviour of Past Visitors to India

Of the 2000 respondents canvassed during the primary survey, 1000 were those who had visited India in the last one year.

3.1.3.1 Reason for Travelling to India

Respondents were asked to indicate their reason for India visit. The maximum traction for India among these travellers from Russia exists because of the business activities that can be done here. 62% of total 1000 respondents indicated this. Other important reasons for travelling to India are holiday and leisure activities (34% of the total 1000 respondents). 2% responses were received in favour of social purposes.

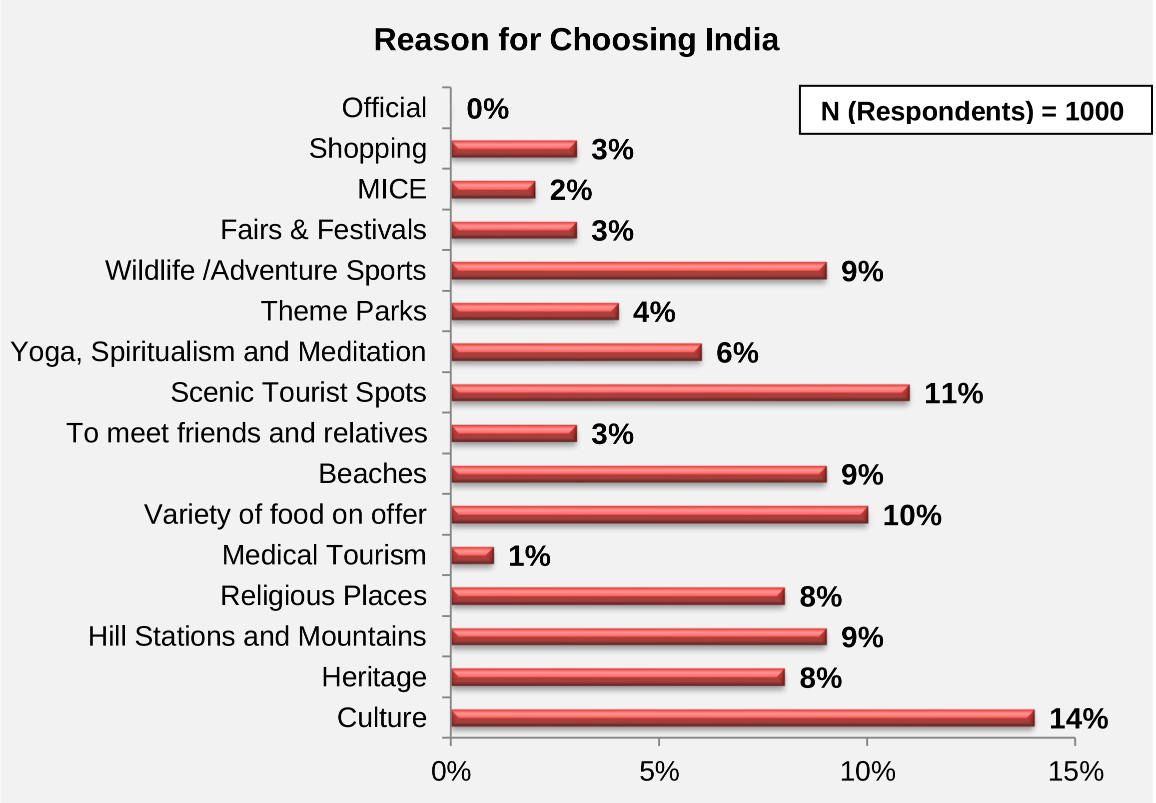
Figure 10: Reason for Travelling to India



3.1.3.2 Reason for Choosing India

Respondents were asked to indicate their reason for choosing India as a travel destination and they were given the freedom to select multiple options. The maximum traction for India among these travellers from Russia exists because of the culture that India offers. 14% of total responses indicated this. Other important reasons for choosing India as a travel destination are scenic tourist spots in India (11% of the total responses), and variety of food (10% of total responses received).

Figure 11: Reason for choosing India



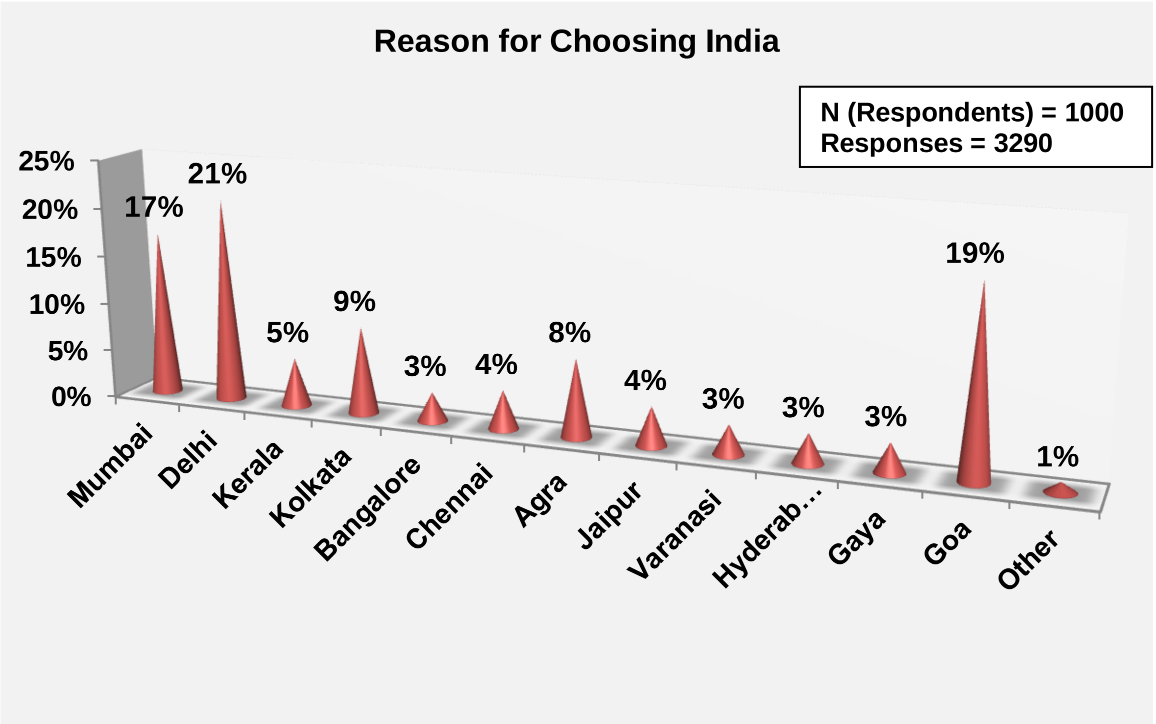
3.1.3.3 Respondent's Medical Tourism Details in India

35 respondents, who travelled to India in the past, mentioned that they did visit India for Medical Tourism purposes. Majority visited Kerala for medical tourism purposes and the specific destinations in Kerala were to Ayurveda centres and to Apolllo hospitals. 71% of the total 35 respondents mentioned that they were fully satisfied with the medical tourism facilities that they visited.

3.1.3.4 Cities Visited in India

1000 past India travellers to India mentioned the cities they visited in India during their visit. 1000 respondents provided 3290 responses regarding the cities in India they visited during their India trip. 21% of the total responses were received in favour of Delhi which came up as the most visited city in India by past Russian travellers to India. The next most visited city in India emerged as Goa with 19% of total responses received.

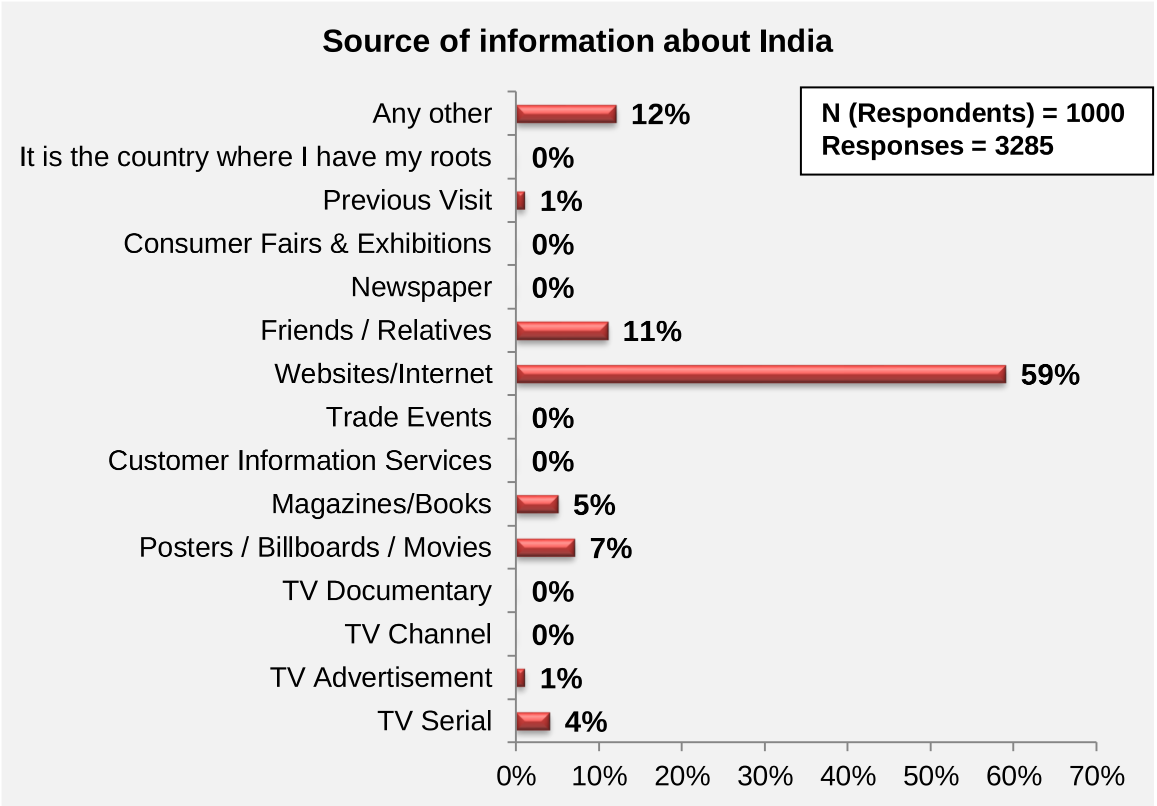
Figure 12: Cities Visited in India



3.1.3.5 Source of information regarding India

Respondents were asked to indicate their source of information about India and they were given the freedom to select multiple options. Travellers who have visited India is the past, have largely known about India through websites and internet, about 59% of responses received indicated this. Friends/ relatives are also an important source of information as was revealed by 11% of the responses received respectively. Some of them (1% of total responses) had visited India before.

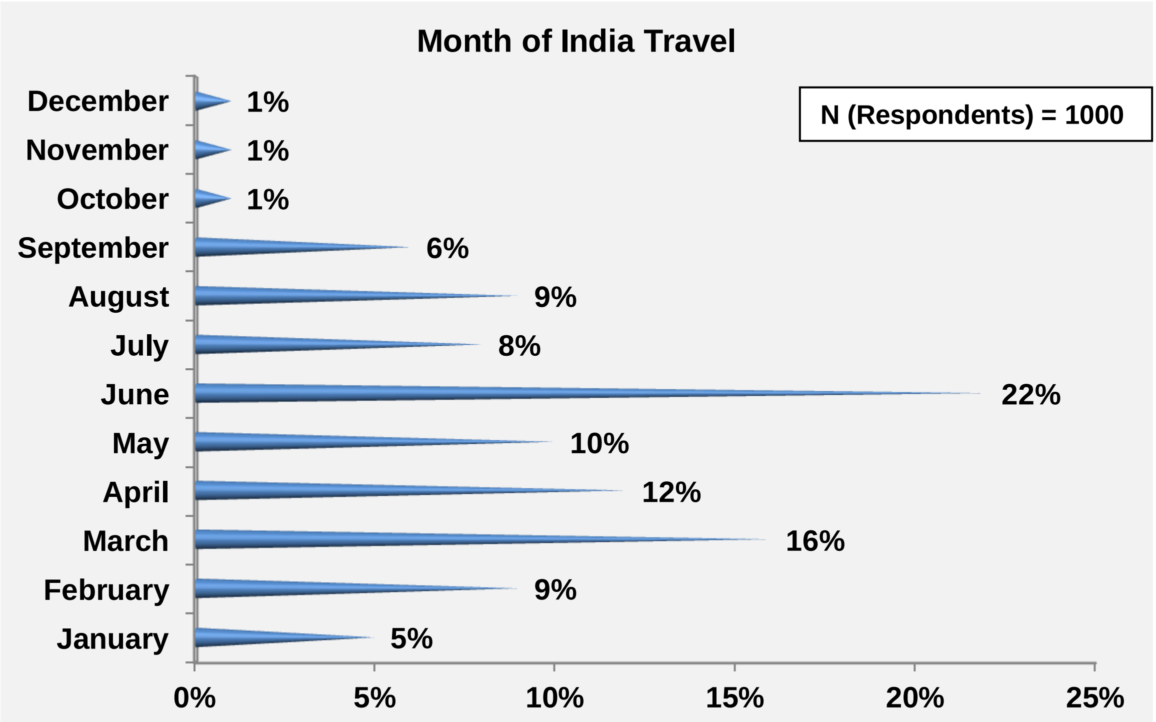
Figure 13: Source of information about India



3.1.3.6 Month of India Travel

1000 past travellers to India mentioned the month during which they visited in India. 22% of the total 1000 respondents mentioned June to be their month of visit. March was the month of visit for 16% of the total 1000 respondents. October to December was the months of least visits by Russians surveyed (1% each of total 1000 respondents).

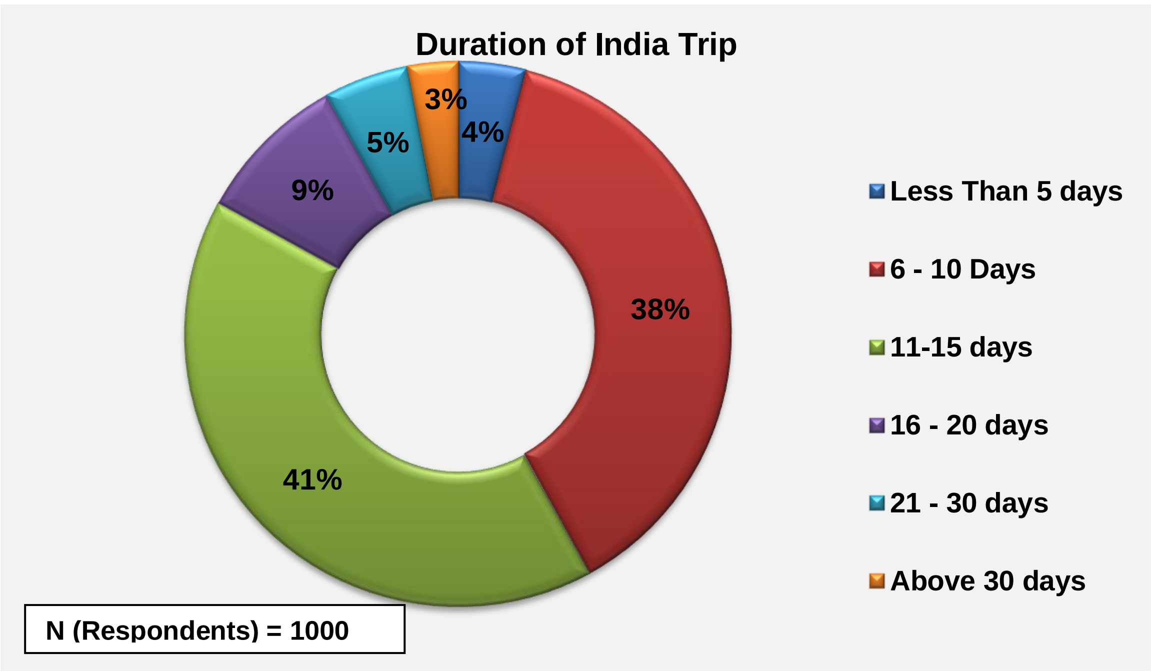
Figure 14: Month of India Travel



3.1.3.7 Duration of India Travel

41% of all 1000 respondents mentioned that their India trip duration was of 11–15 days. While 38% of the total 1000 respondents mentioned that their India trip lasted for 6–10 days. Only 3% of the total 1000 respondents toured India for more than 30 days.

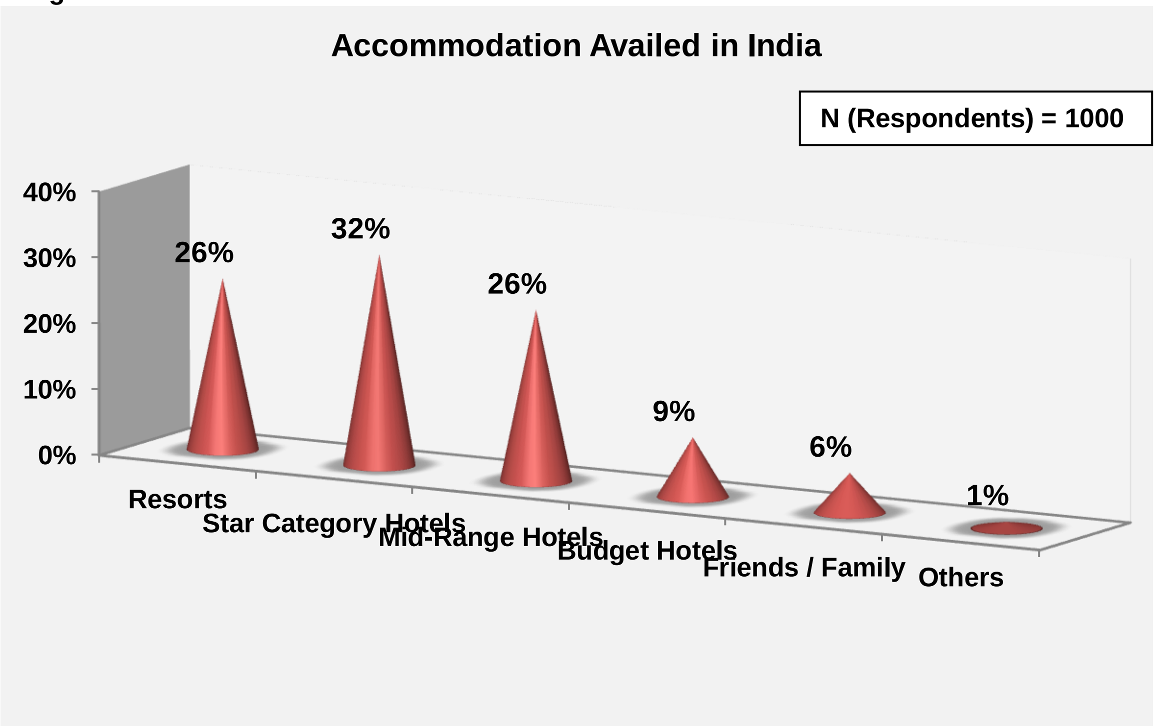
Figure 15: Duration of India travel



3.1.3.8 Accommodation Availed in India

32% of the total 1000 past travellers to India mentioned that they stayed in star hotels in India during their visit. 26% of the total 1000 respondents provided mentioned that they stayed in mid-range hotels during their India trip. Only 6% of the total respondents stayed with their friends and relatives during their India trip.

Figure 16: Accommodation Availed in India

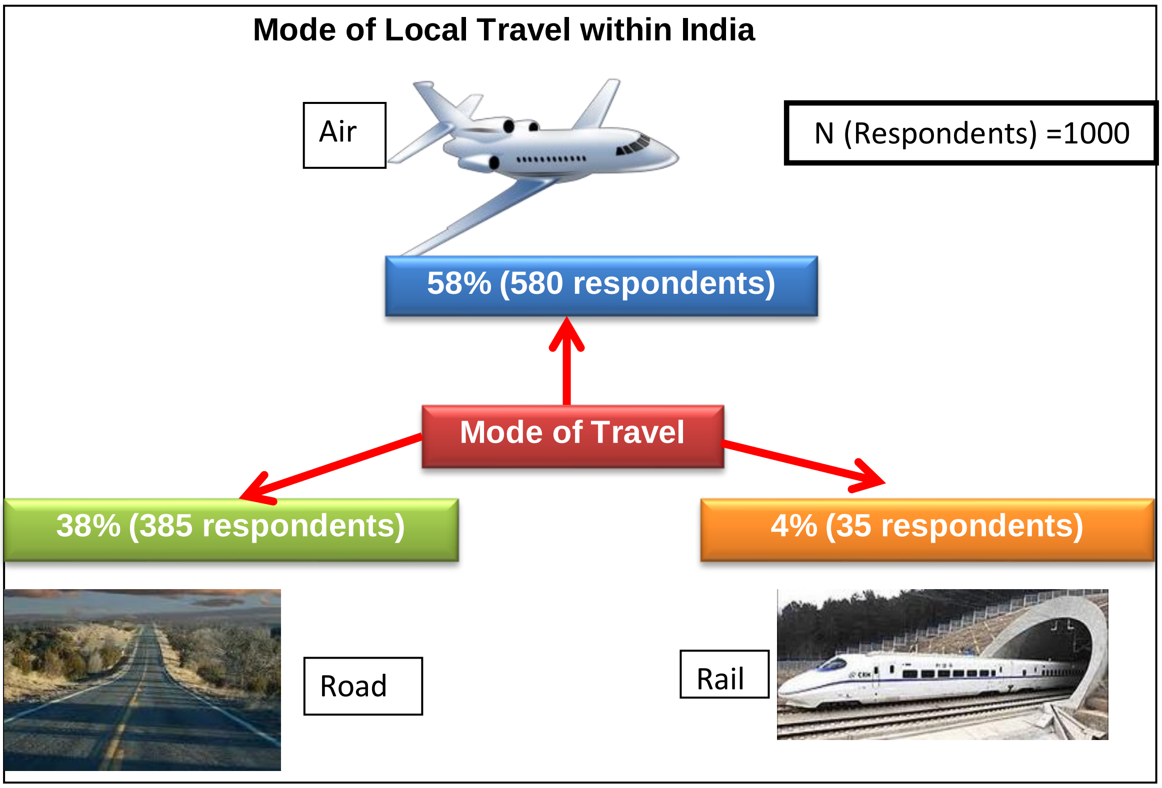


Note: Star category hotels: Hotels with more than 4 stars; Mid-ranged hotels: Hotels of 3 stars rating; Budget hotels: Hotels with 1-2 stars rating

3.1.3.9 Mode of local travel within India

Respondents who visited India were asked to indicate their choice of transport within India and they were given single option responses. It was found that within India, majority, 58% people travelled by air alone. Next most favoured mode of travel within India was by road (38% of the total 1000 respondents). Only 4% of the total 1000 respondents preferred to travel by rail within India.

Figure 17: Mode of Local Travel within India



Of the 35 respondents who responded to the query on trains availed of, 30 claimed to have availed of the luxury trains like Deccan Odyssey, Golden Chariot and Indian Maharaja.

3.1.3.10 Expenses for India Trip

Respondents who visited India were asked mention their package and non-package expenses that occurred for their trip in India. The average per head trip expenses both under package and non-package heads are as follows.

Figure 18: Average per Person Expenses for India Trip

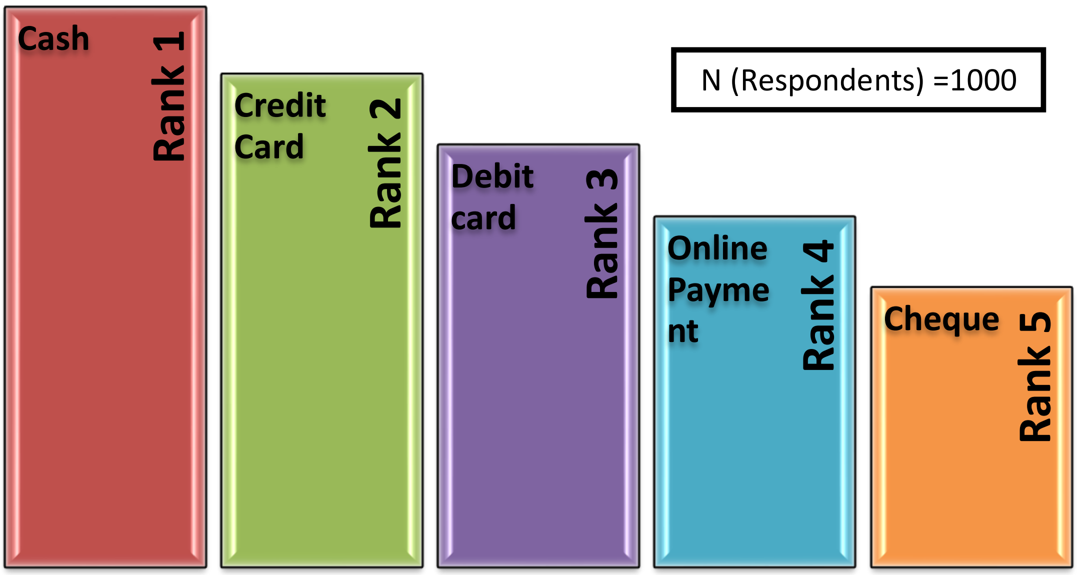
N (Respondents) =1000

Package Cost	Cost Heads	Non-package Cost
USD 1582	Accommodation	USD 531
USD 1556	International Travel	USD 505
USD 428	Local Travel	USD 217
USD 515	Food & Alcohol	USD 226
USD 453	Other	USD 191
USD 4534	Total	USD 1670

3.1.3.11 Payment Mode in India

Respondents who visited India were asked to rank their payment modes in India during their past trip. The ranks awarded by the past Russian travellers to India are presented below.

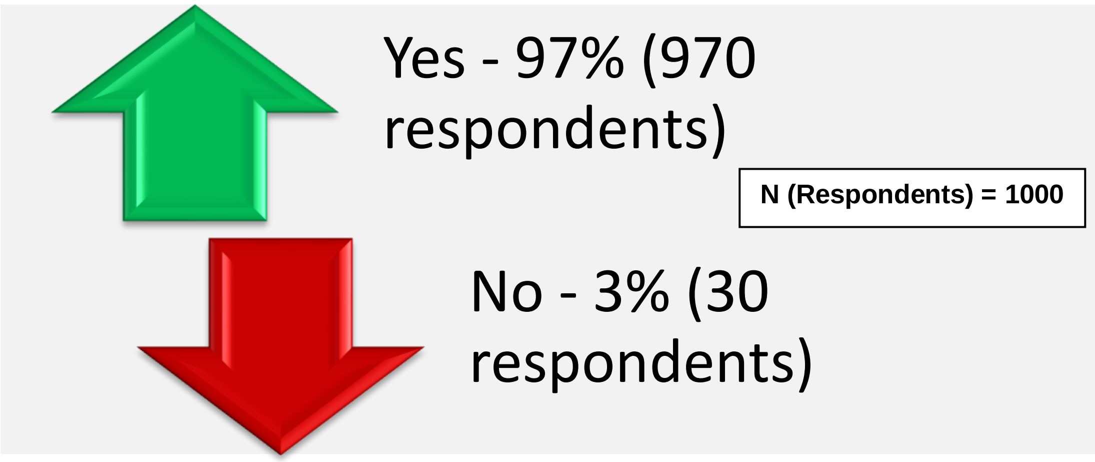
Figure 19: Payment Mode in India



3.1.3.12 Revisit India

Respondents who visited India were asked if they would revisit India in future and the responses received from 1000 past Russian travellers to India are presented below.

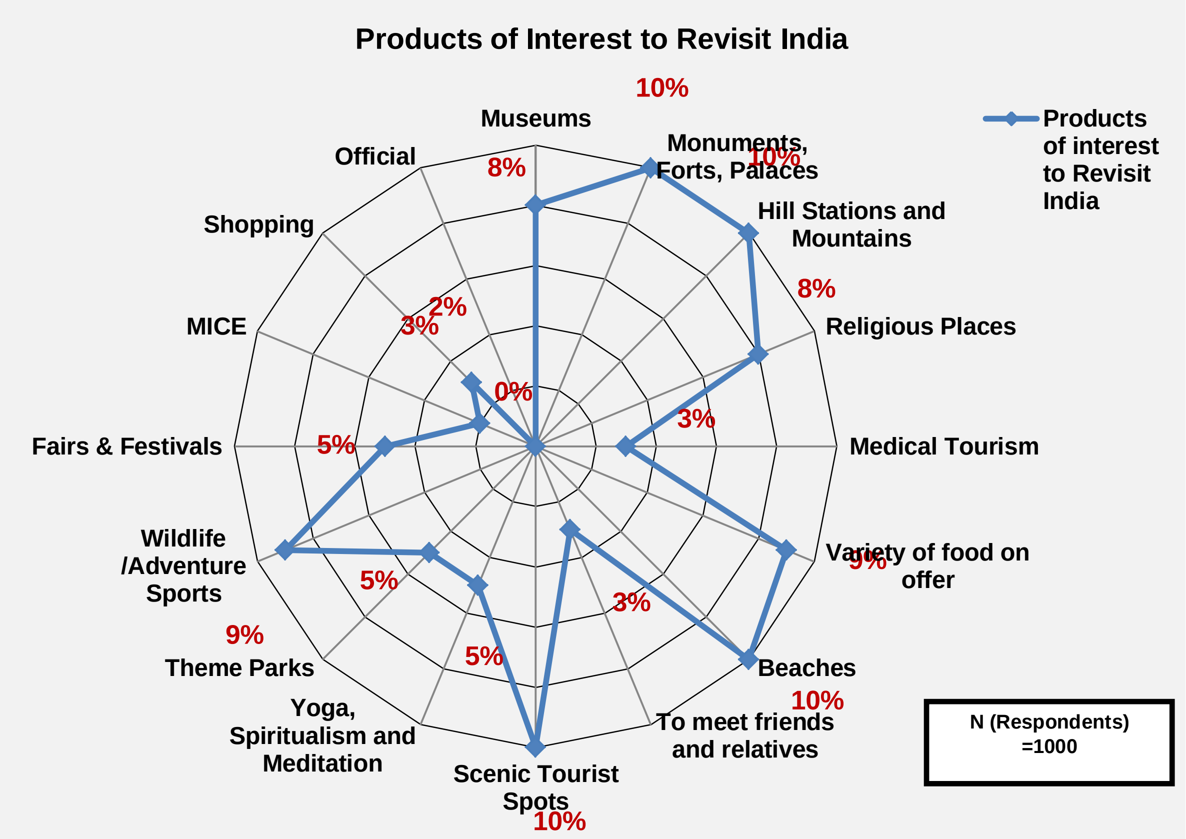
Figure 20: Revisit India



3.1.3.13 Attractions for re-visiting India

Respondents who visited India were asked to indicate attractions that would draw them to India again and they were given the freedom to select multiple options. Of interest to India visitors are its monuments and forts, hill stations, mountains, beaches and scenic tourist places. There are a miniscule number (25 of total responses) who plan to visit India on official purposes and another 120 responses indicating pursuits related to MICE to attract visitors to India.

Figure 21: Attractions for revisiting India



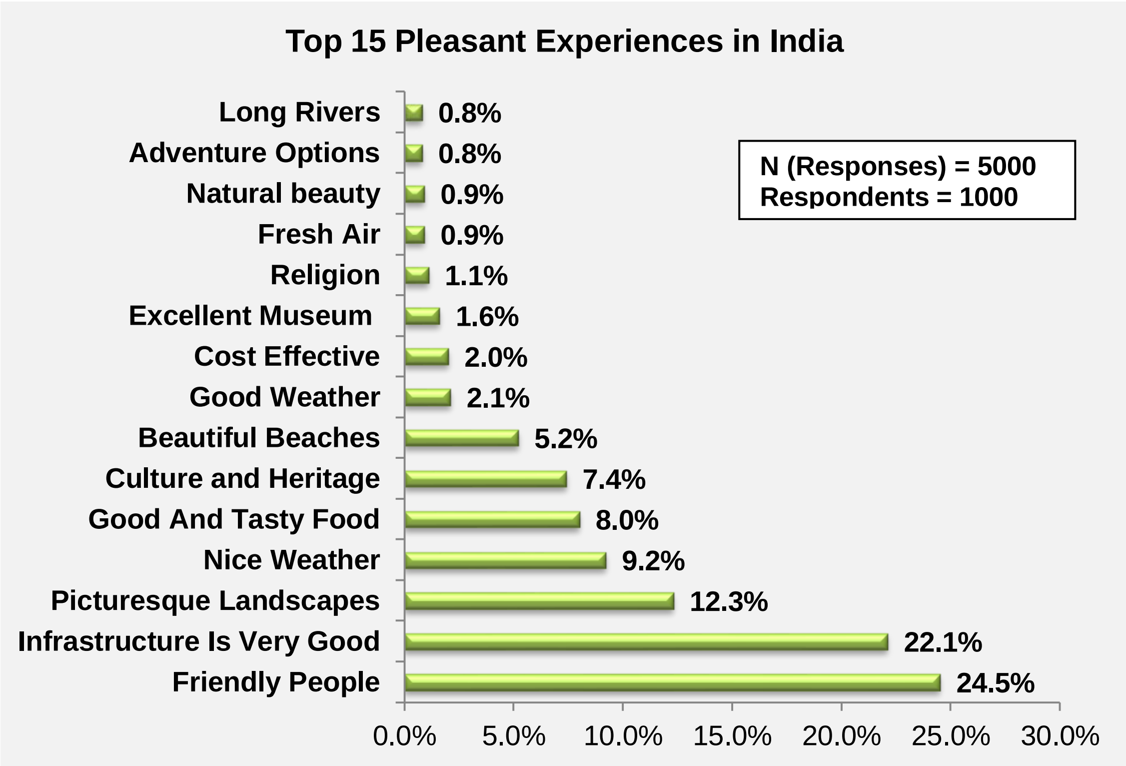
3.1.3.14 Reason for not revisiting India

The 30 persons out of 1000 who did express that they would not be revisiting India, cited problems related to visa issues for India as the primary concern. High expenses in India and safety/ security issues were also important concerns cited.

3.1.3.15 Best and worst experiences in India

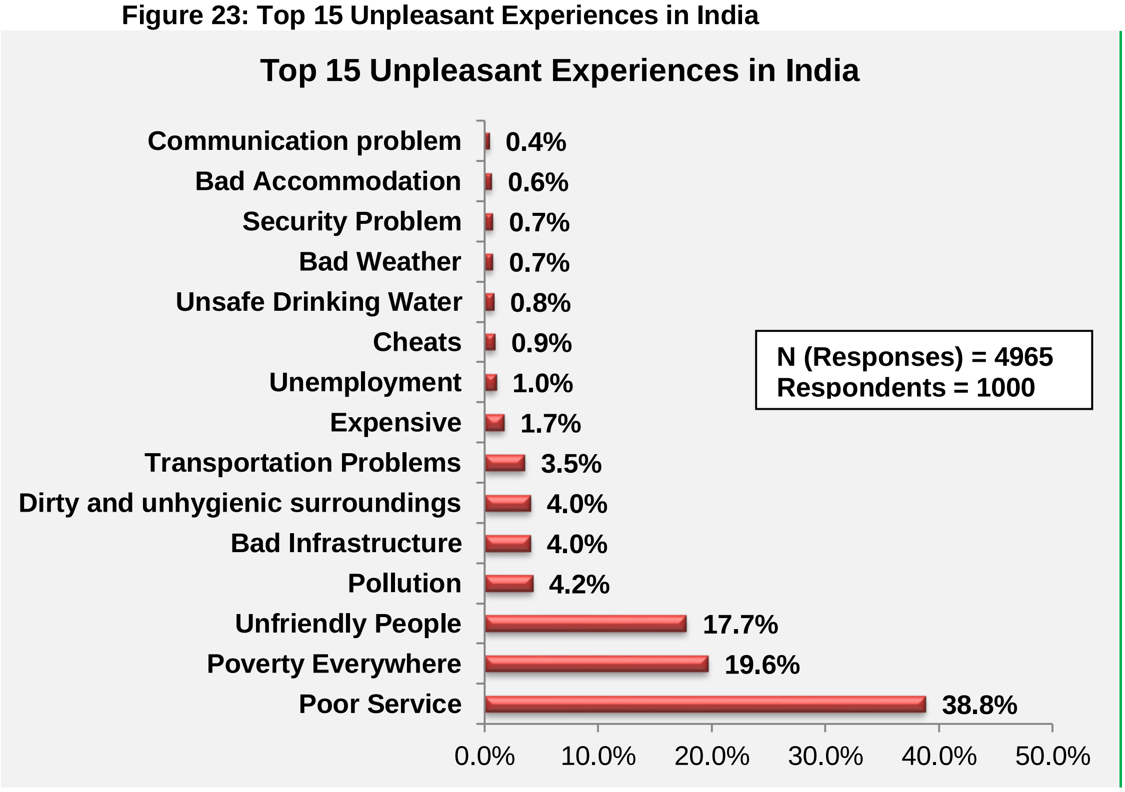
Tourists from Russia, who have visited India, are very impressed by the hospitality and friendliness of Indians, infrastructure in India and particularly happy with the food. Those fond of food like India because of the vast cuisine it offers. Respondents who visited India were asked to indicate their best and most enjoyable aspects about coming here and they were given the freedom to select multiple options. The best part of coming to India is cited as friendly people (24.5% of the responses), infrastructure (22.1% of the responses) and picturesque landscapes (12.3% of the responses).

Figure 22: Top 15 Pleasant Experiences in India



Sources of discomfort or unpleasantness were cited as poor service and poverty. Many respondents felt that the people in India are rude in terms of behaviour. Pollution, traffic and hygiene standards were also cited as sources of unpleasantness.

Figure 23: Top 15 Unpleasant Experiences in India



3.1.3.16 Satisfaction from visiting India

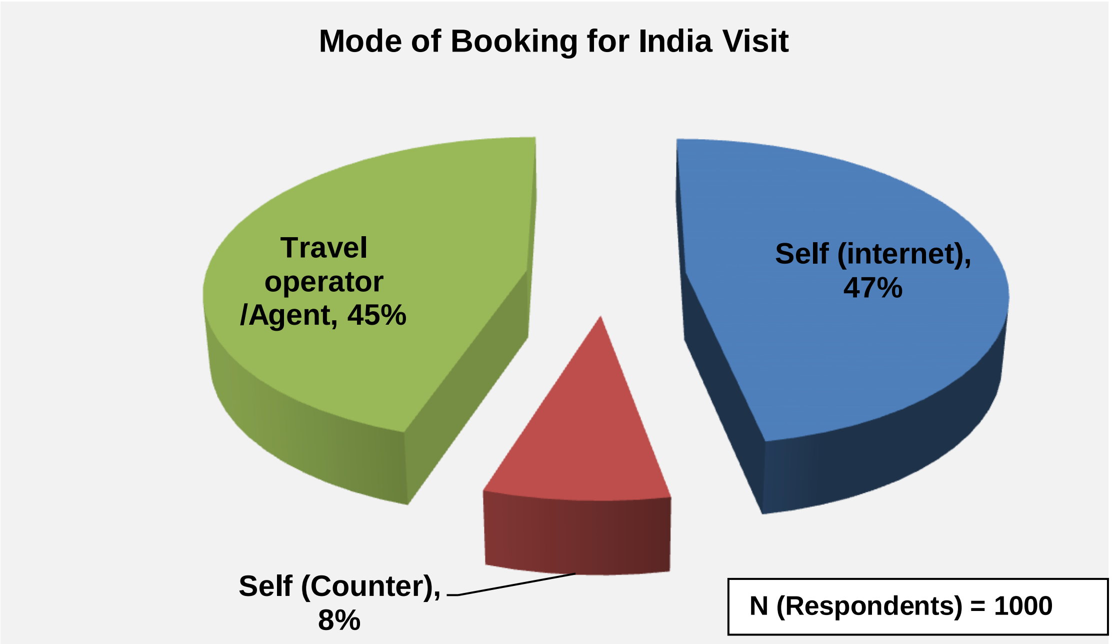
Overall, 62% of the 1000 past travellers to India interviewed in the survey were satisfied with their experience in visiting India and mentioned it was "Excellent". 32% of the respondents rated their India holiday experience as 'Good'.

Figure 24: Satisfaction with Visit to India

3.1.3.17 Mode of booking

Around 47% of the respondents booked their tickets online themselves. Another 45% use travel agents while 8% of the total 1000 respondents booked their tickets themselves over the counter.

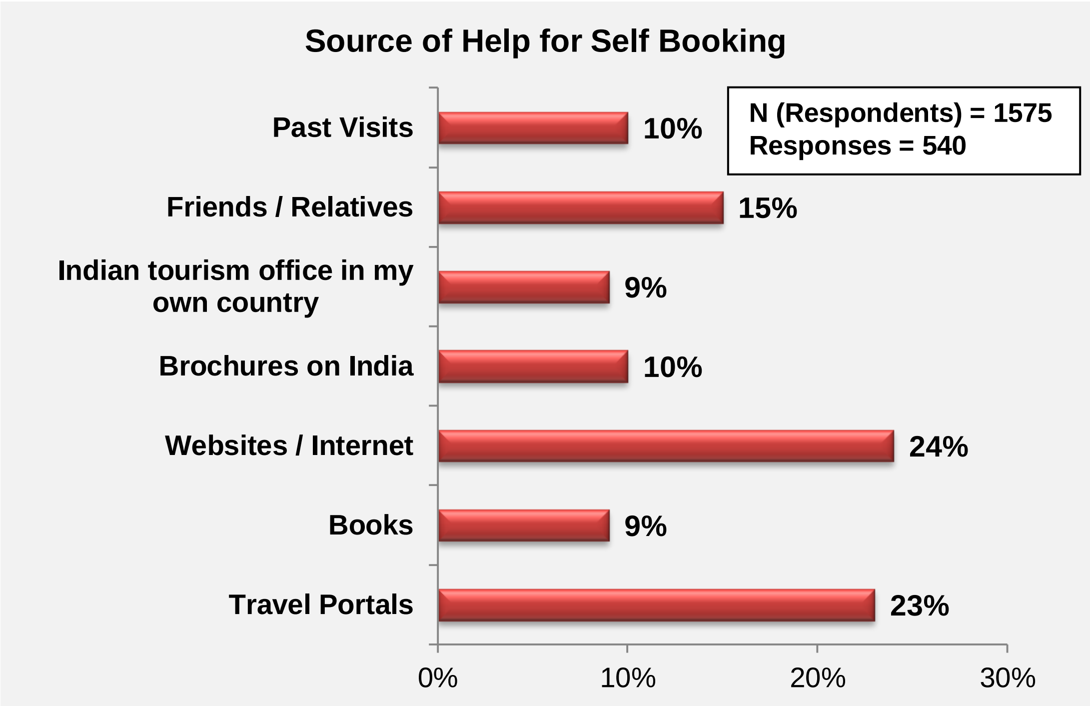
Figure 25: Mode of Booking for India Trip



3.1.3.18 Sources of Help While Self Booking

The 540 respondents who did not consult tour operators were asked to indicate sources of assistance they approached in order to book their tickets for the India trip. 24% of the responses received from internet and 23% from travel portals revealed that the internet was a very important source of information for travellers as well as a powerful tool for sorting out travel modalities. 15% responses showed that on occasion friends and relatives were also consulted.

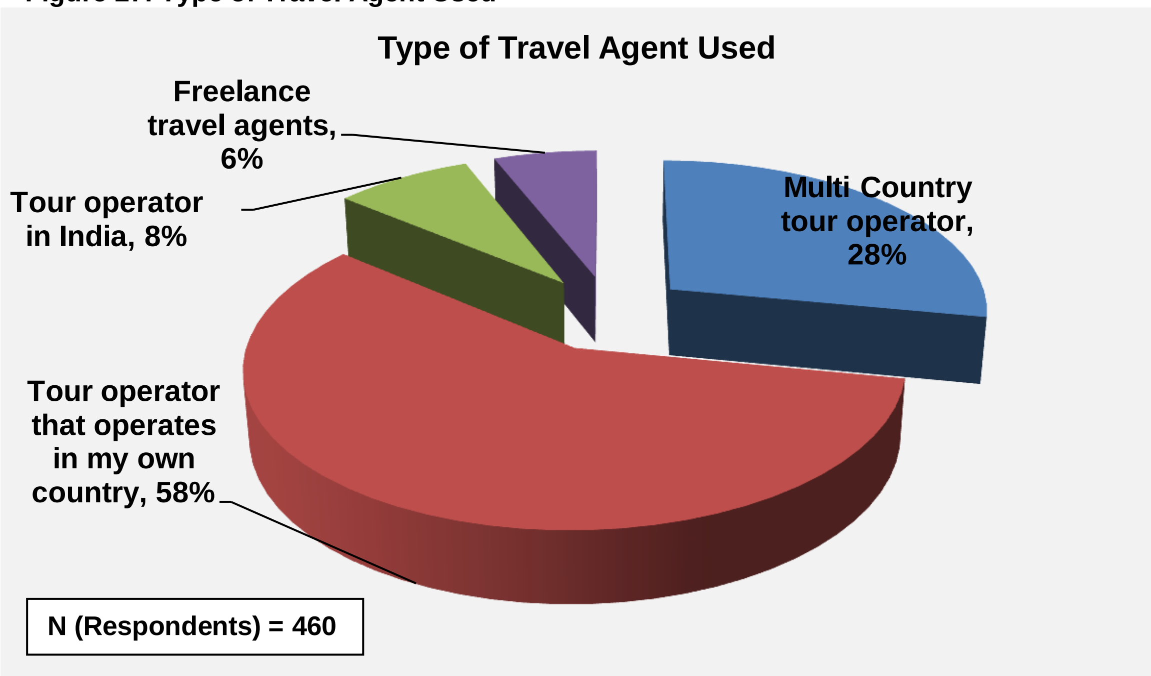
Figure 26: Source of help while self-booking



3.1.3.19 Type of tour operator used

Of the 1000 respondents who travelled to India in the past, 460 respondents consulted tour operators. These persons were asked to reveal information about the type of tour operator consulted and multiple responses were received. It was found that in 58% of the cases these are operators from the Russia. In 28% cases multi-country tour operators are also consulted. But consultation with Indian tour operators is mower at 8%.

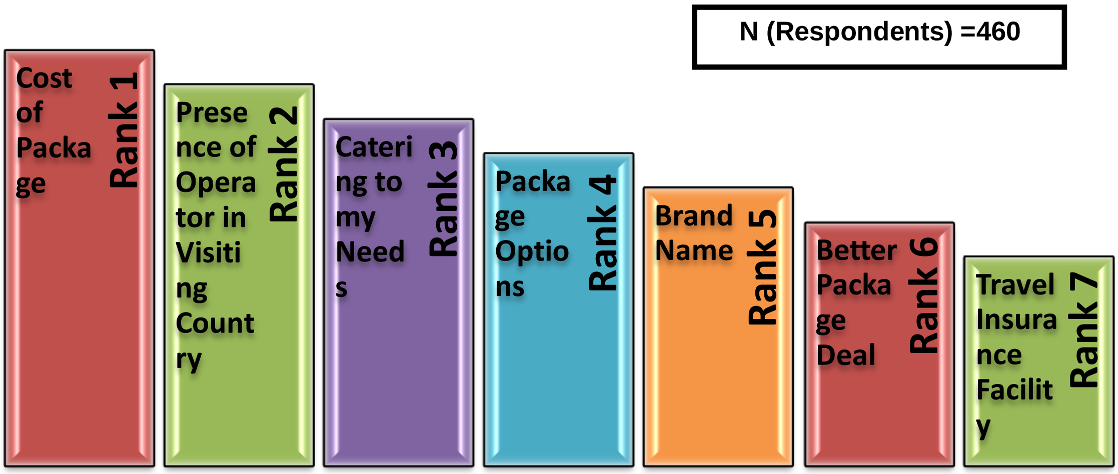
Figure 27: Type of Travel Agent Used



3.1.3.20 Tour operators selection criteria

In the choice of the tour operator, for these 460 respondents, the cost of the package offered were the key deciding factor followed by presence of tour operator in visiting country and catering to the needs of the travellers.

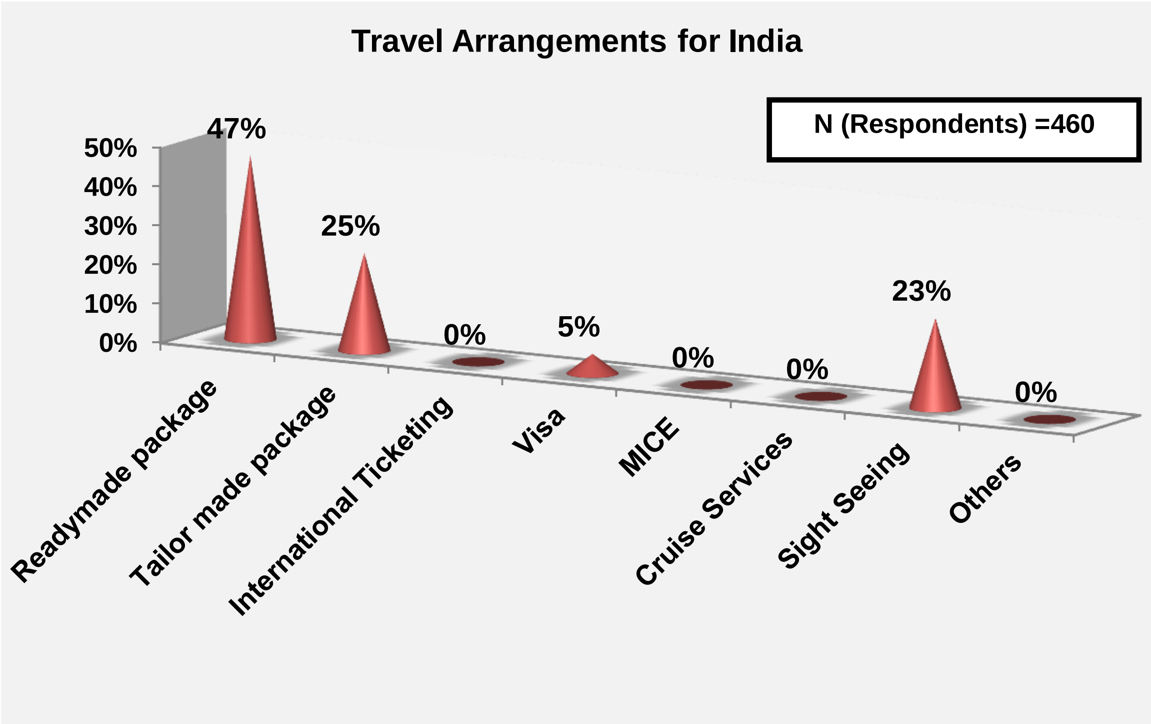
Figure 28: Tour Operators Selection Criteria



3.1.3.21 Travel Arrangements for India

The 460 respondents, who opted for tour operators for their trip to India, were asked about the kind of travel arrangements they used from tour operators. Readymade package was the service that most (47% out to total 460 respondents) travellers opted for travel arrangement through tour operators 25% out of the total 460 respondents mentioned that tailor made package was the travel arrangement they chose.

Figure 29: Travel Arrangements for India

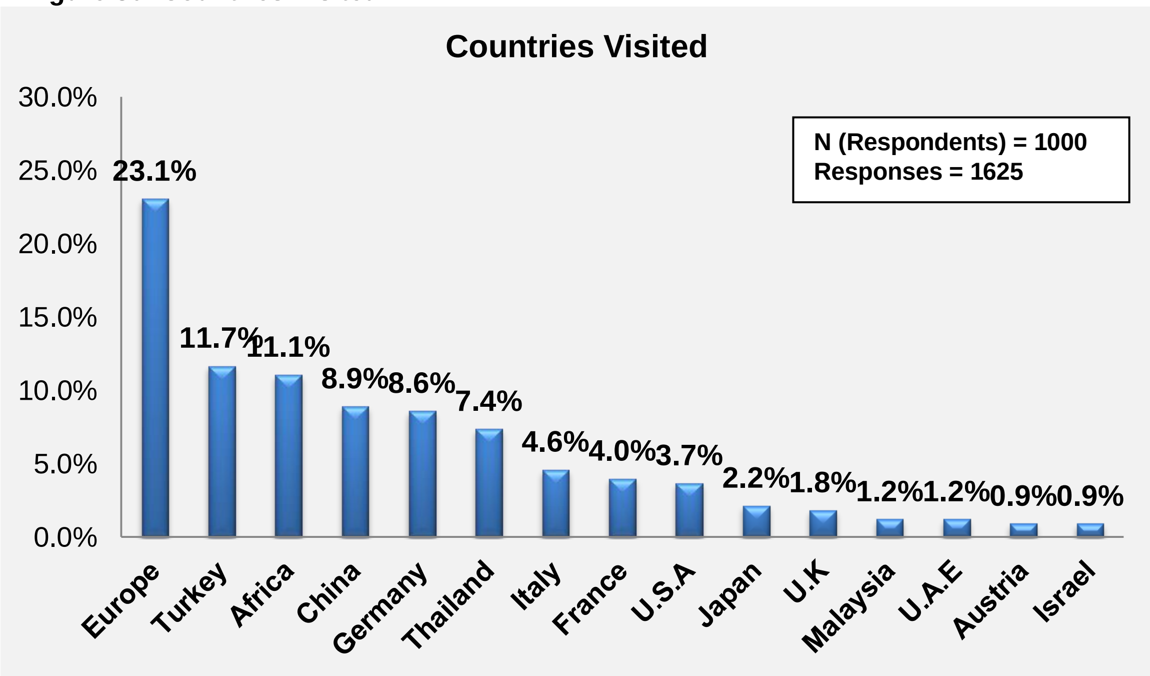

Travel Arrangements for India
N (Respondents) =460
50%
40%
30%
20%
10%
0%
47%
25%
0%
5%
0%
0%
23%
0%
Readymade package
Tailor made package
International Ticketing
Visa
MICE
Cruise Services
Sight Seeing
Others

3.1.4 Travel Behaviour of Past Visitors to Other Countries

3.1.4.1 Countries Visited in past

Among the 1000 respondents who had travelled out of Russia in the past one year but not to India, the maximum visits have been made to Europe followed by Turkey, Africa and China. These top countries constituted 54.8% of all responses.

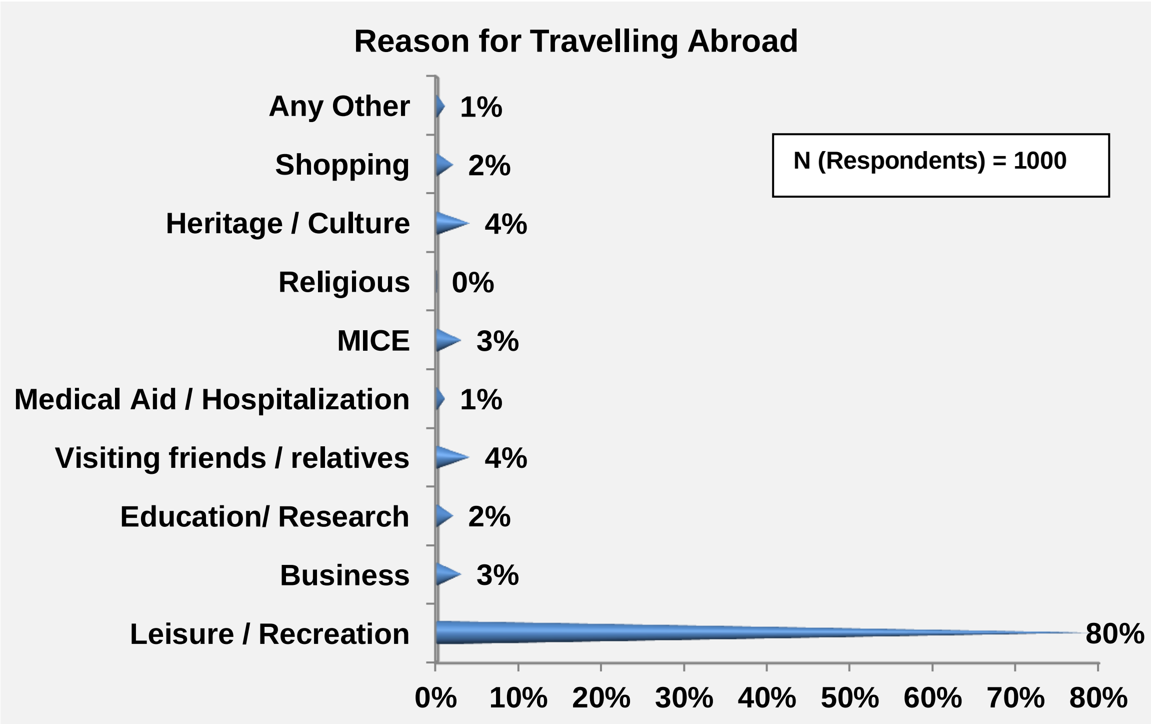
Figure 30: Countries Visited



3.1.4.2 Reason for Travelling Abroad

Respondents who visited countries other than India were asked to indicate the main driving factors for their decision to travel. The most commonly cited reason for travelling abroad was leisure or recreation (80% of total 1000 respondents); while some other factors were to visit heritage and culture (4% of total 1000 respondents) or visiting friends and relatives (4% of all responses).

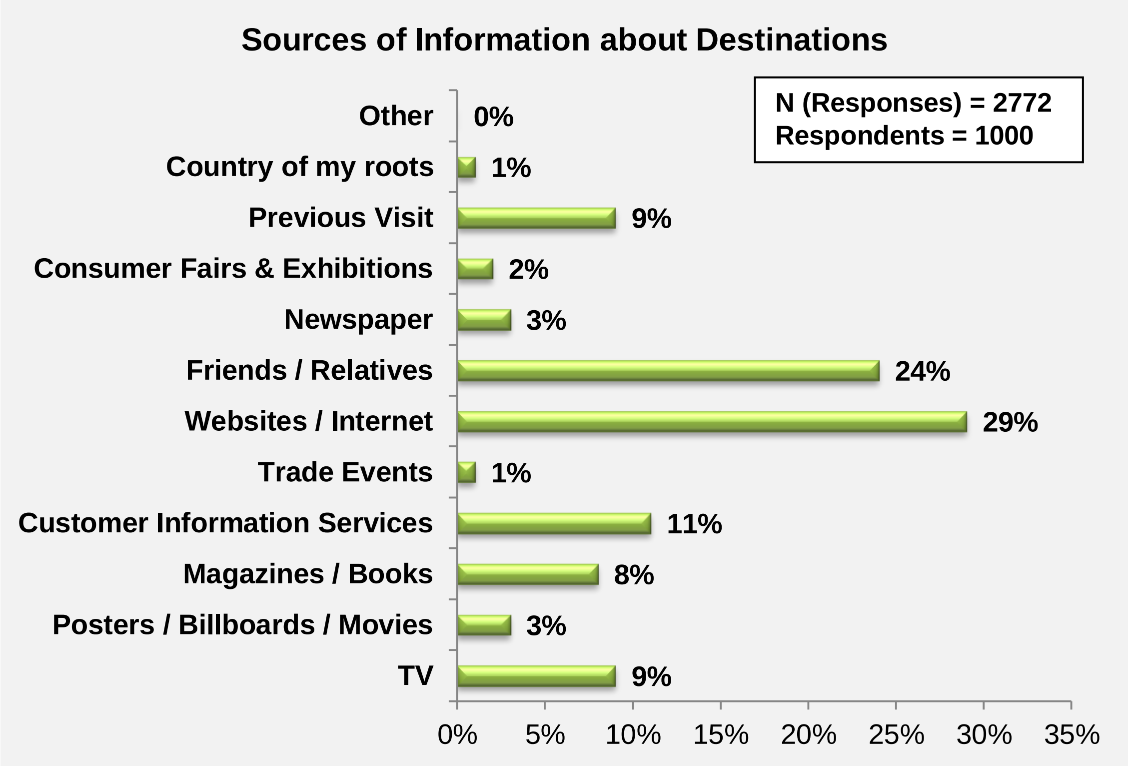
Figure 31: Reason for Travelling Abroad



3.1.4.3 Sources of information on the destinations visited in past

Respondents who visited countries other than India were asked to indicate the main sources of information regarding the destinations they had travelled to and they were given the freedom to select multiple options. 1000 respondents yielded 2772 responses. A large number of travellers have found out about the destination countries in most cases from the internet or websites (29% of all responses). In many cases they have also heard from relatives and friends as also because they have been to the country earlier (24% of all responses). Customer information services were also cited as sources of information (11% of all responses)

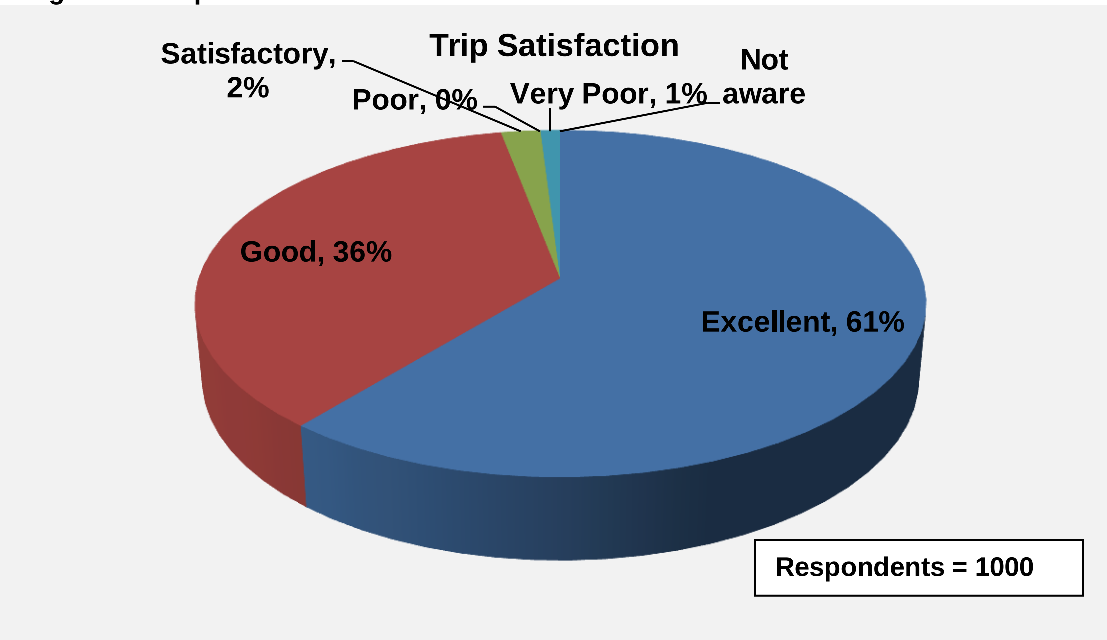
Figure 32: Sources of Information about Destinations Visited



3.1.4.4 Trip Satisfaction

An overwhelming 97% of the respondents believed that their experience had been good to excellent.

Figure 33: Trip Satisfaction



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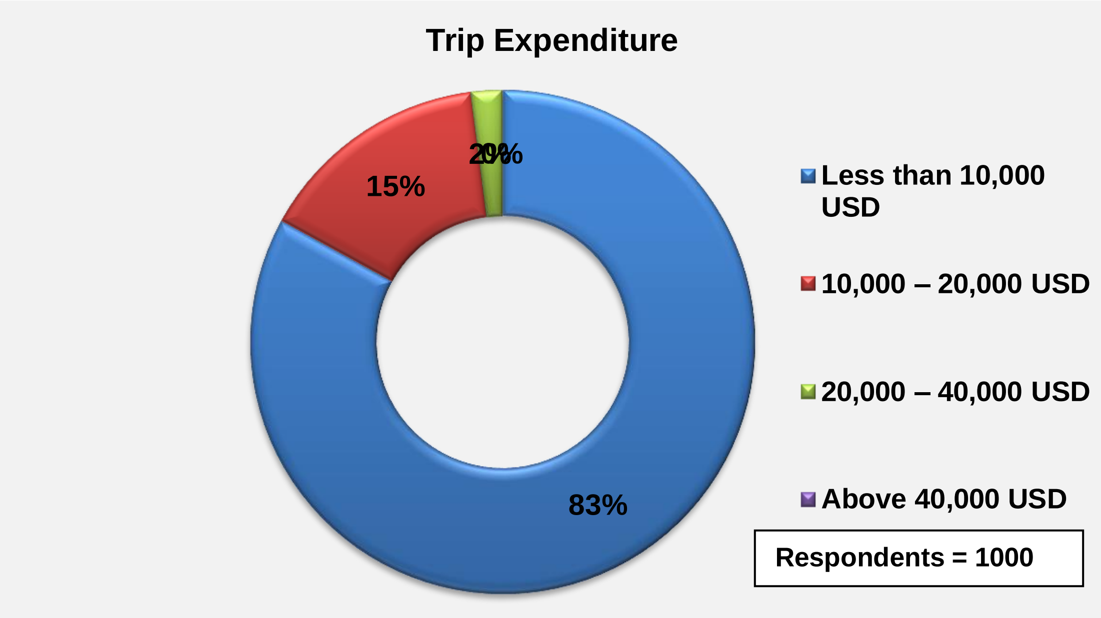
3.1.4.5 Trip Expenditure

An overwhelming 83% of the respondents spent less than USD 10,000 for their entire trip in total.

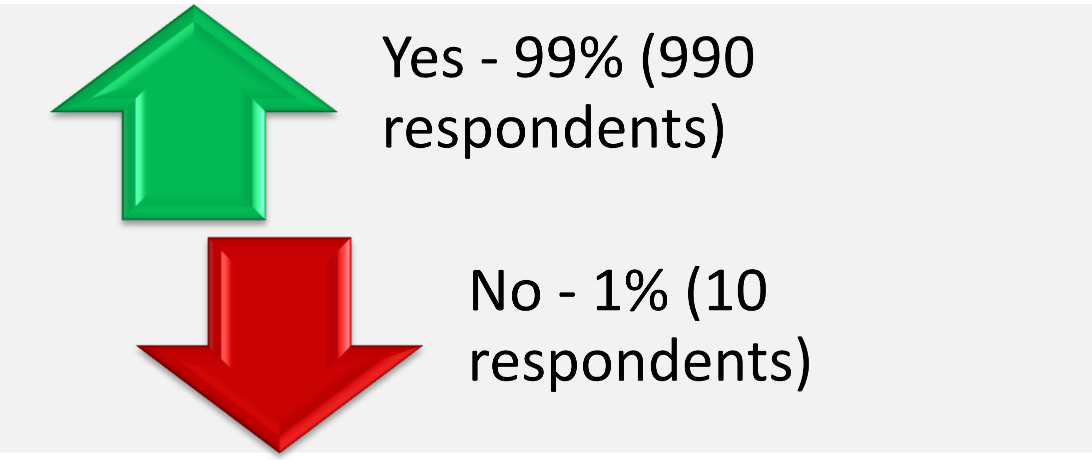
Figure 34: Trip Expenditure



3.1.4.6 Value for money destinations visited

An overwhelming 99% of the respondents out of the total 1000 respondents believed that their experience had been worth the money they spent.

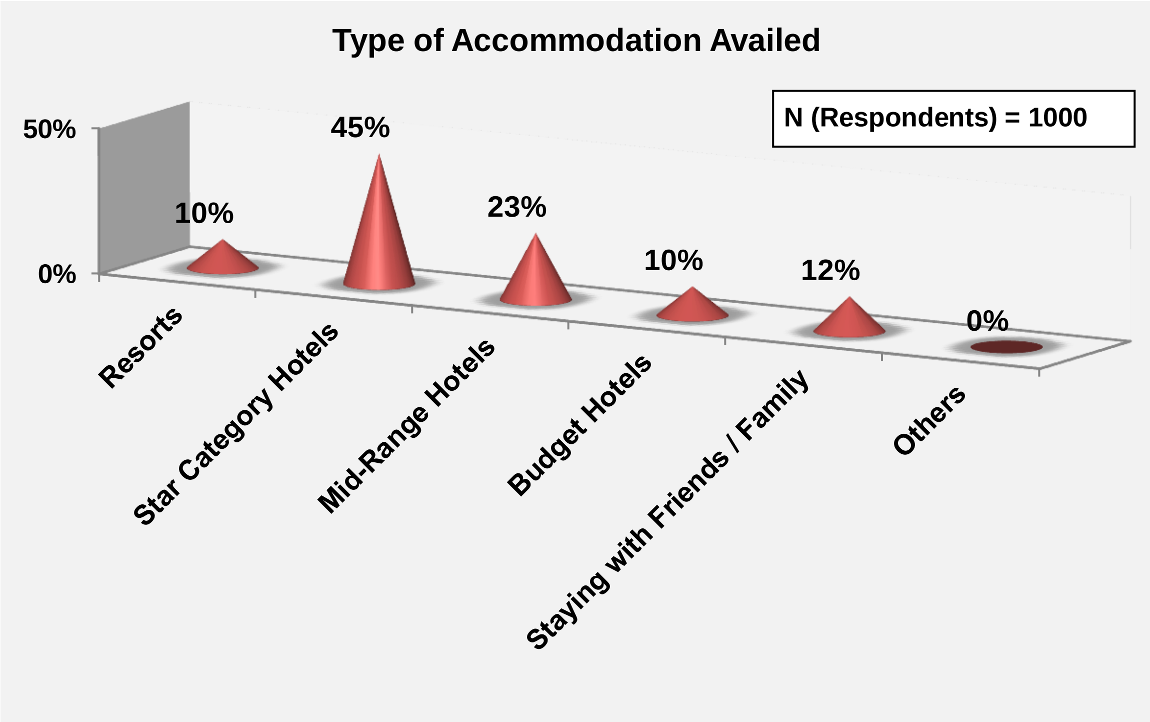
Figure 35: Value for Money Destination



3.1.4.7 Type of accommodation used

About 45% of all 1000 respondents who travelled to countries other than India stayed in star hotels during their visit. 10% stayed in budget hotels while about 1% stayed with friends and relatives. 23% of the 1000 respondents spent on mid-range hotels.

Figure 36: Type of Accommodation Availed

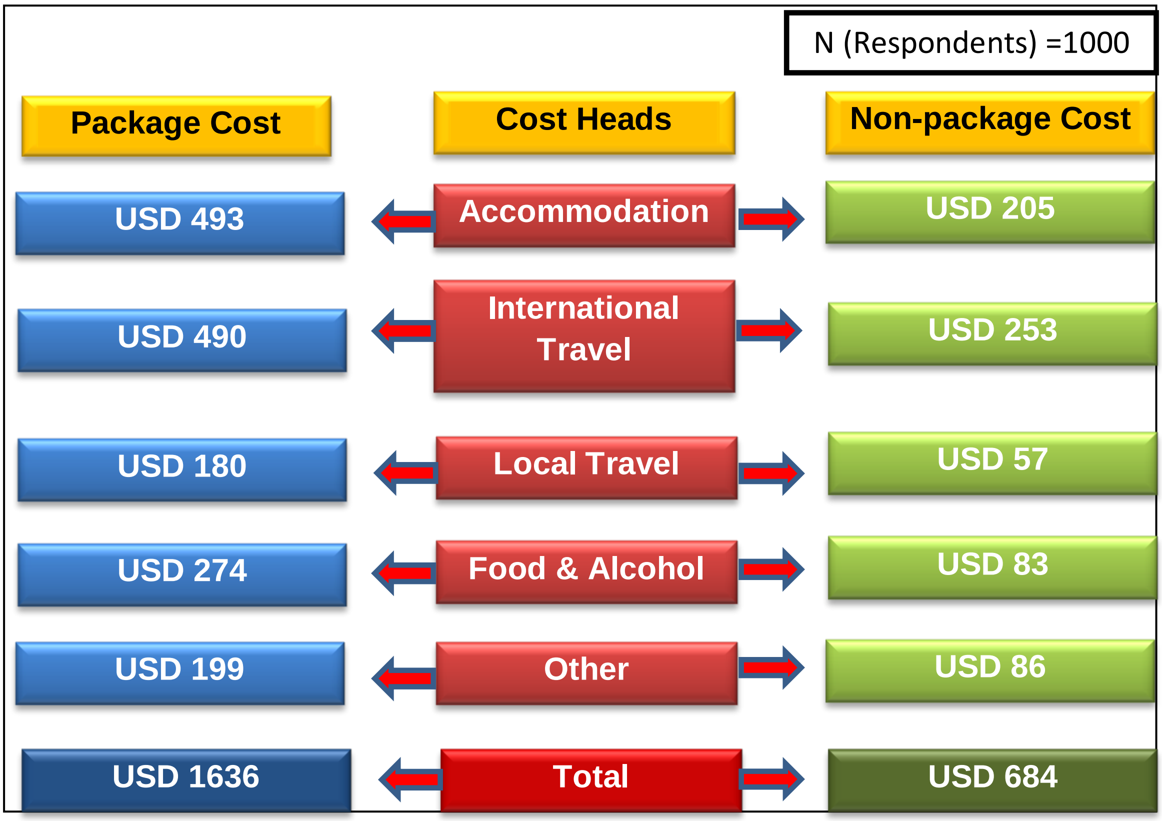


Note: Star category hotels: Hotels with more than 5 stars; Mid-ranged hotels: Hotels lying in the bracket of 3-4 stars; Budget hotels: Hotels lying in the bracket of 1-2 stars

3.1.4.8 Package and Non-package Expenses Incurred

The package and non-package expenses incurred by the 1000 respondents who travelled abroad in past is presented in the figure below.

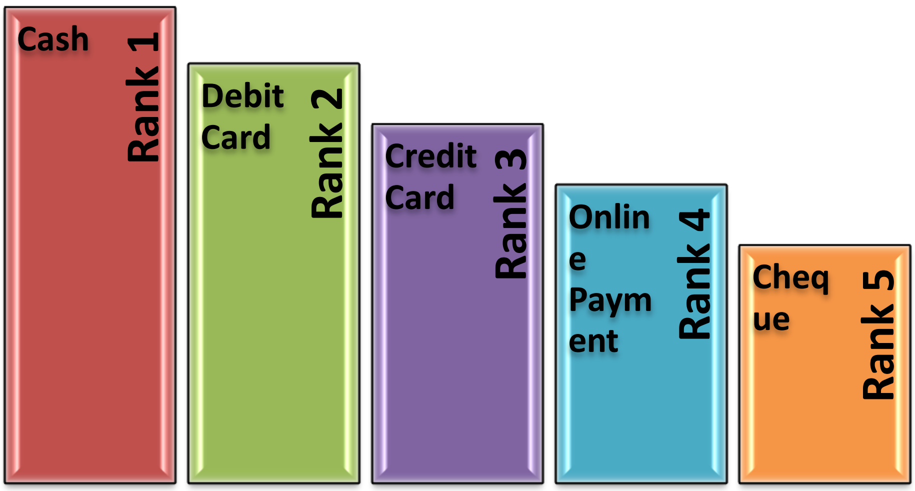
Figure 37: Package and Non-package Expenses



3.1.4.9 Mode of Payment

The 1000 respondents who had travelled abroad to other countries in the past were asked to state their preferred modes of payment during their trip abroad. The most preferred mode of payment as mentioned by the 1000 respondents was cash.

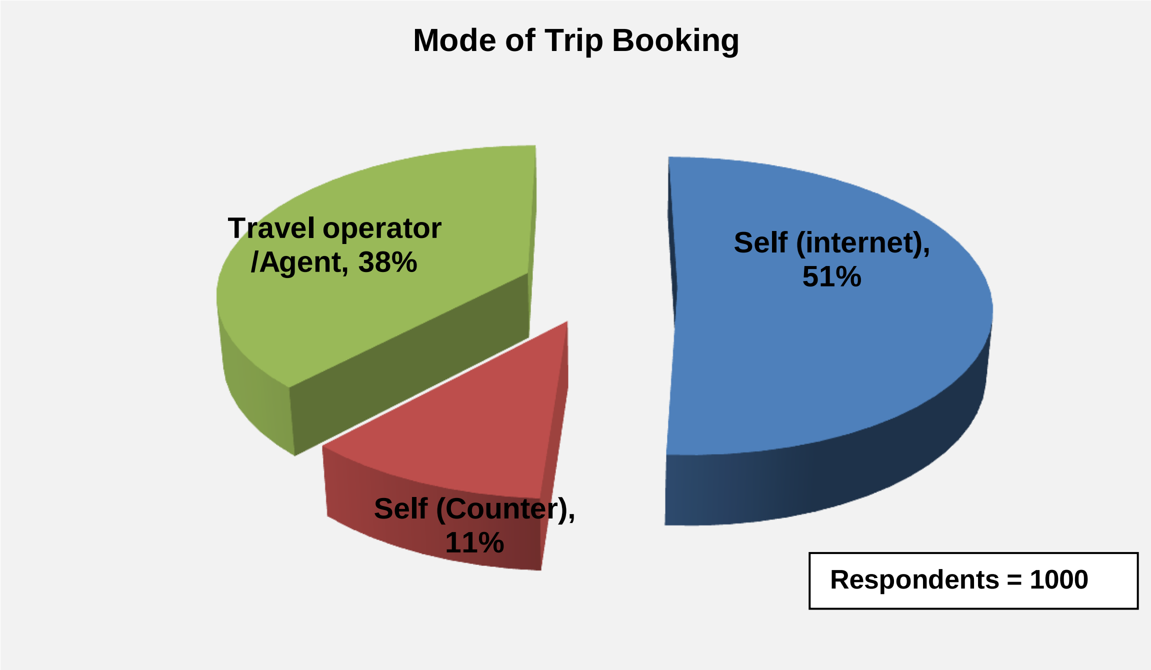
Figure 38: Mode of Payment



3.1.4.10 Mode of Trip Booking

About 62% of all 1000 respondents who travelled to countries other than India booked their trips themselves.

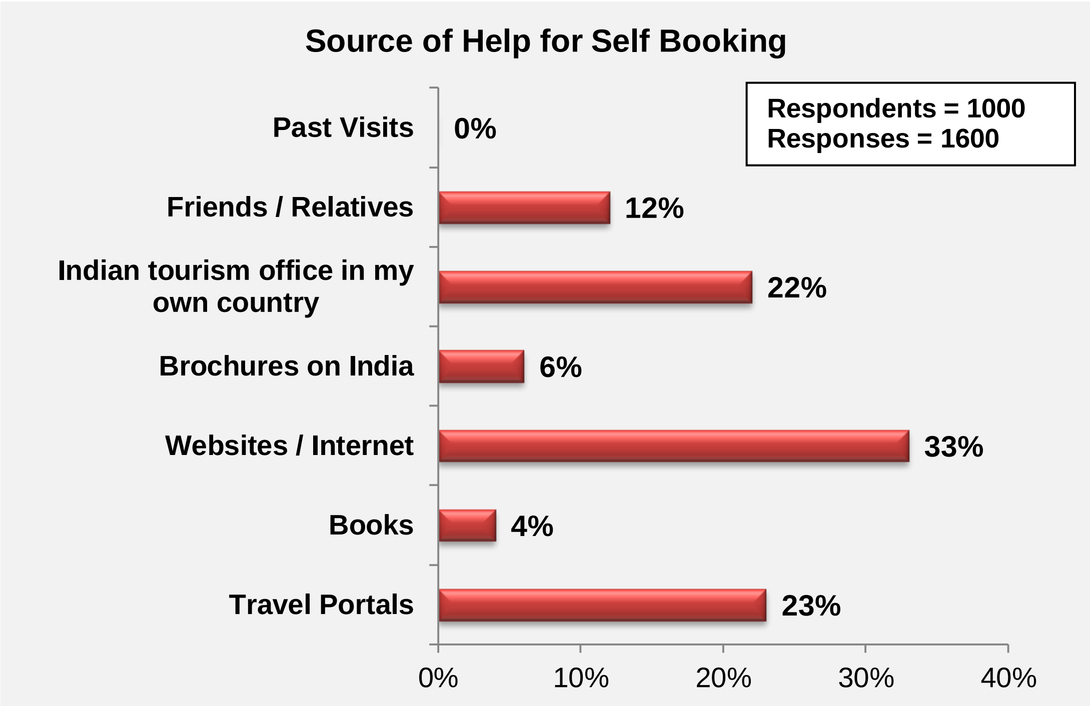
Figure 39: Mode of Trip Booking



3.1.4.11 Help While Self Booking for Trip

The 1000 respondents, who travelled to countries other than India doing their own booking, were asked about their source of help for their trip booking and were given the multiple options.1600 responses were received from the 1000 respondents and 33% of responses indicated that the major source of help was websites/ internet.

Figure 40: Source of Help for Self Booking



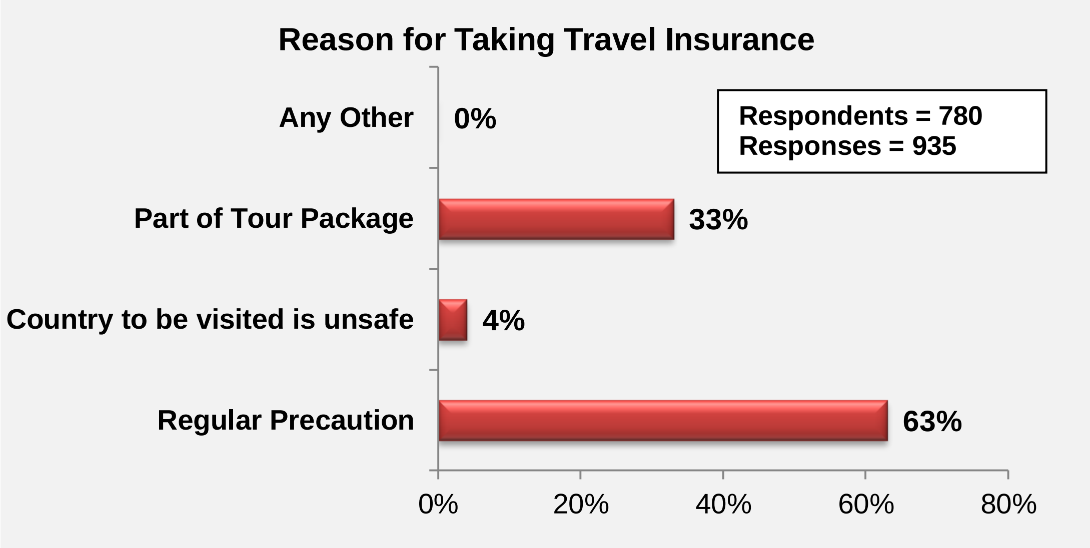
3.1.4.12 Travel Insurance Availed

About 78% of total 1000 respondents who travelled to countries other than India availed travel insurance for their trip.780 respondents opted for travel insurance while 220 respondents (22% of 1000 respondents) did not opt for travel insurance.

3.1.4.13 Reason for Taking Travel Insurance

About 63% of 780 respondents who availed travel insurance mentioned that they took it just for regular precaution.

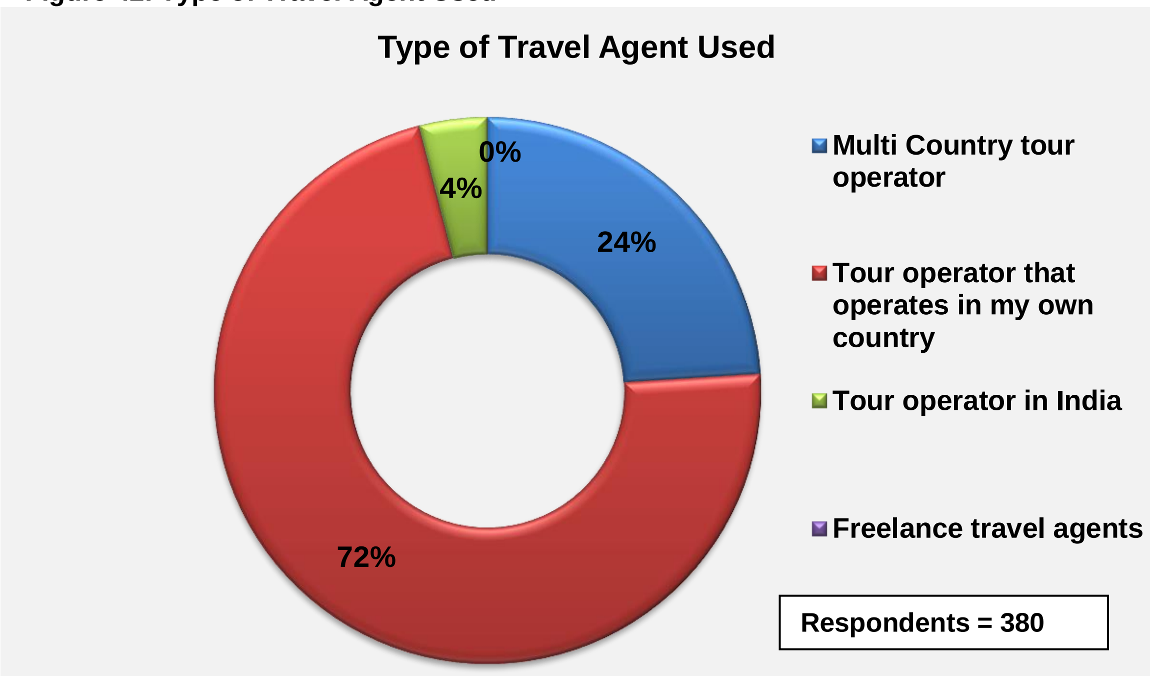
Figure 41: Reason for Taking Travel Insurance



3.1.4.14 Type of Travel Agent Used

About 72% of the total of 380 respondents, who took the services of a travel agent for trip booking, mentioned that they chose a travel agent who operated in their own country.

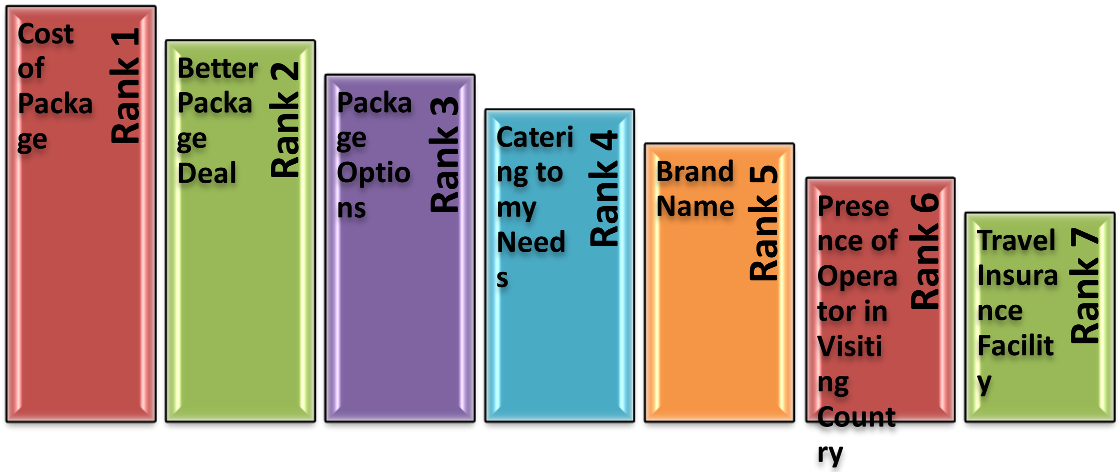
Figure 42: Type of Travel Agent Used



3.1.4.15 Selection Criteria of Tour Operators

The 380 respondents, who travelled to countries other than India in the past through tour operators, were asked about the important factors they considered while selecting the tour operator and also asked to rank them. The respondents mentioned that the cost of the package is the most important criteria for selection of tour operator.

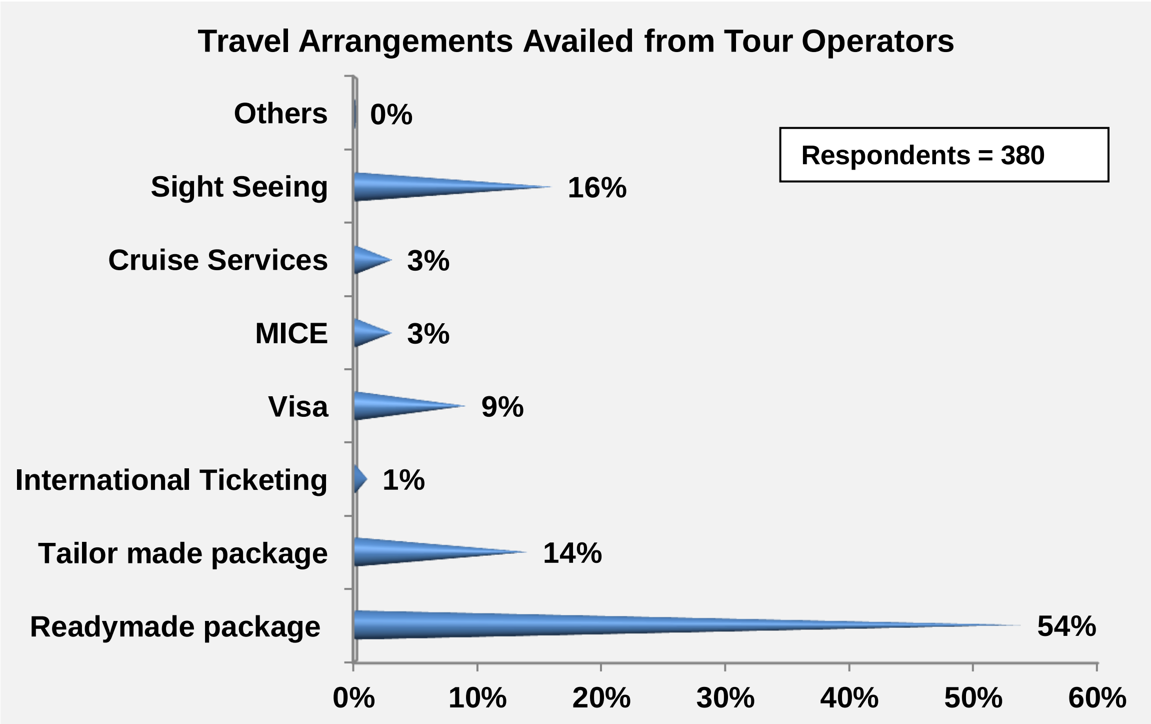
Figure 43: Selection Criteria of Tour Operators



3.1.4.16 Travel Arrangements Availed from Tour Operators

The 380 respondents, who travelled to countries other than India in the past through tour operators, were asked about the travel arrangements they availed from the tour operators. 54% of the total of 380 respondents mentioned that a readymade package was the arrangements availed from the tour operator.

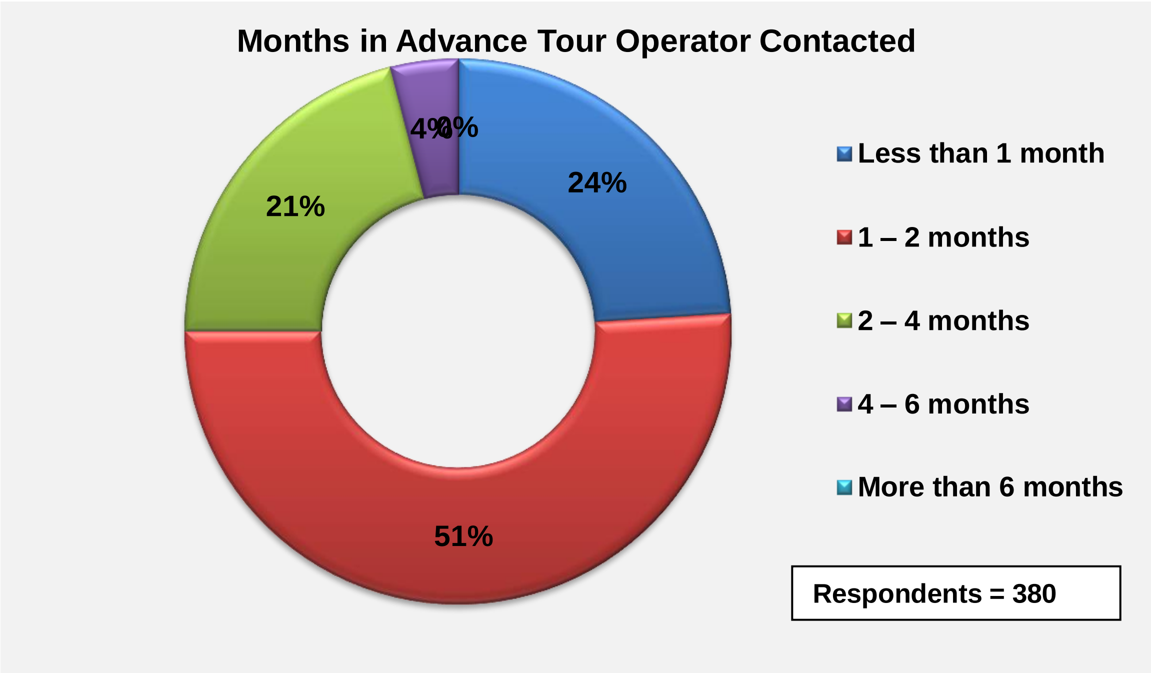
Figure 44: Travel Arrangements Availed from Tour Operators



3.1.4.17 Months before Contacted Tour Operator

The 380 respondents, who travelled to countries other than India in the past through tour operators, were asked about the months in advance tour operators were contacted by them. 51% of the total of 380 respondents mentioned that they contacted the tour operator around 1 to 2 months in advance.

Figure 45: Months in Advance Tour Operators Contacted



3.1.4.18 Awareness of India as a tourist destination

About 81% of all 1000 respondents who had visited other countries in the last one year were aware of India as a tourist destination.

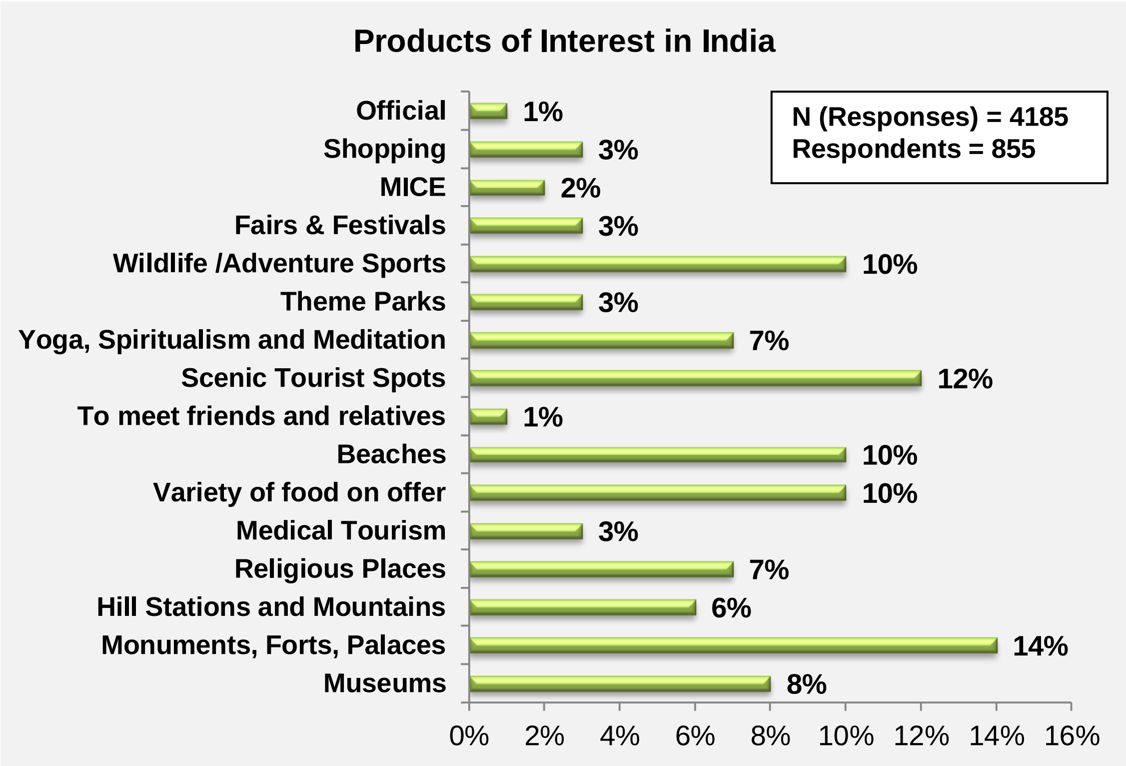
3.1.4.19 Intention of visiting India

Though 81% of the respondents (810 respondents) were aware of India as a tourist destination, about 85% of the total 1000 respondents expressed interest in visiting India during their next trip.

3.1.4.20 Primary attractions of India / motivation for visiting India

The 855 respondents who indicated that they would like to visit India on their next trip were asked what their primary attractions in India were (multiple options could be chosen). 4185 responses were received from 855 respondents in response to this question. Most respondents admitted that they found India attractive for its monuments, forts and palaces (14% of 4185 responses).

Figure 46: Products of Interest in India

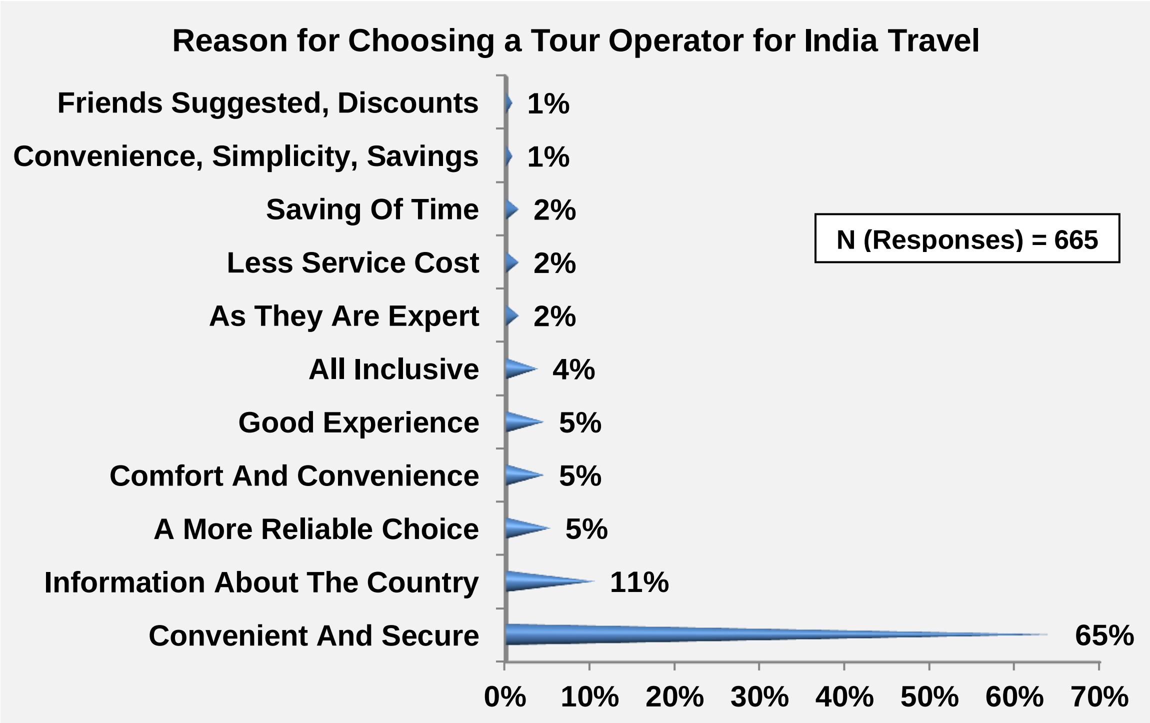


3.1.4.21 Intention and reason for choosing an intermediary for India travel

All the 1000 respondents, who had travelled to countries other than India in past, were asked that if they ever decide to travel to India, would they plan their trip on their own or through a travel operator. 66% of the respondents showed inclination to consult a tour operator and 34% said that they would plan their own trips.

Among those willing to consult tour operators, some also offered insights into why they felt the need to avail of the services of an intermediary. 65% of responses showed that the travellers would like to approach tour operators for the convenience and security they offer. About 11% of the responses were in favour of the knowledge and information that a tour operator would provide.

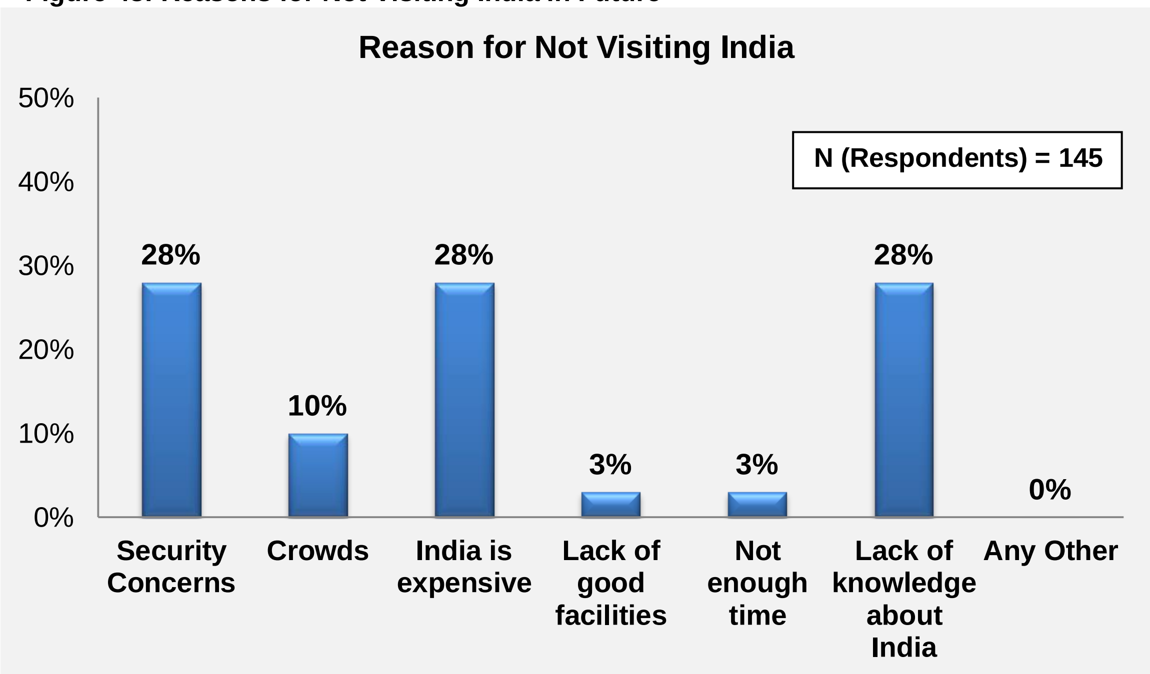
Figure 47: Reason for Approaching Tour Operators



3.1.4.22 Reasons for rejecting India as a tourist destination and intention of India visit in distant future

Among those who were not interested in visiting India (145 of 1000 respondents), the primary concern that proved a dampener was security concern in India (18% of the 145 respondents received in this context).

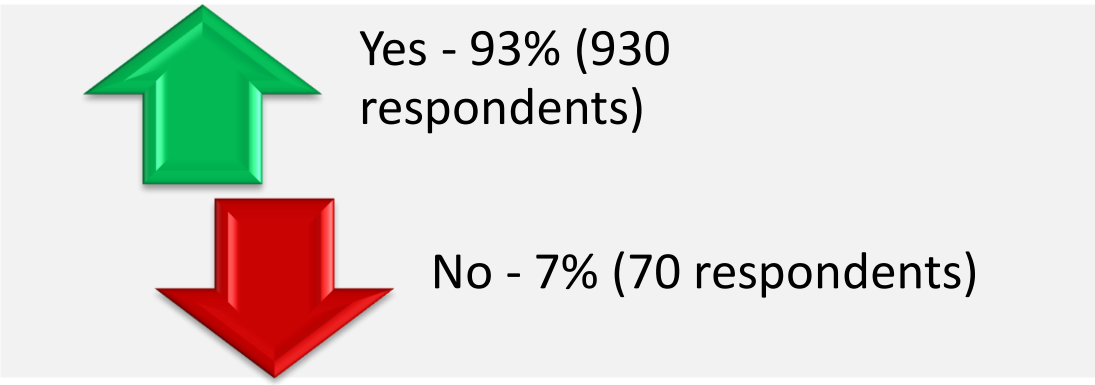
Figure 48: Reasons for Not Visiting India in Future



3.1.4.23 Visit India Ever

All 1000 past travellers from Russia to countries other than India were asked if they would ever visit India and 93% of the 1000 respondents stated that they would visit India. 7% respondents out of 1000 past travellers to other countries responded in the negative on ever travelling to India.

Figure 49: Visit India Ever



3.1.5 India vis-à-vis Other Countries - Past Outbound Travel Behaviour

3.1.5.1 Accommodation Availed by Past Travellers

Among past travellers who headed to India, a large percentage (26%) stayed in resorts whereas travellers who headed to other countries, 10% stayed in resorts.

Table 13: Accommodation Availed by past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
26%	Resorts	10%
34%	Star Category Hotels	45%
26%	Mid-Range Hotels	25%
9%	Budget Hotels	10%
6%	Staying with Friends / Family	12%
1%	Others	0%

3.1.5.2 Package Expenses of Past Travellers

Travellers to India have incurred a much higher average per capita package expense (**<u>all costs in US$</u>**) than those travelling to other countries.

Table 14: Package expenses of Past Travellers – India vs. Other Country

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
1582	Accommodation	493
1556	International Travel	490
428	Local Travel	180
515	Food including alcohol	274
453	Others	199
4534	Total	1636

3.1.5.3 Non-Package Expenses of Past Travellers

Travellers to India have incurred a much more higher overall average per capita non-package expense (**<u>all costs in US$</u>**) than those travelling to countries other than India.

Table 15: Non-Package Expenses of Past Travellers – India vs. Other Country

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
531	Accommodation	205
505	International Travel	253
217	Local Travel	57
226	Food including alcohol	83
191	Others	86
1670	Total	684

3.1.5.4 Preferred Mode of Payment of Past Travellers

For both past travellers who headed to India and to other countries, cash was the most preferred mode of payment.

Table 16: Preferred Mode of Payment of Past Travellers – India vs. Other Country

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
1	Cash	1
5	Cheque	5
4	Online	4
2	Credit Card	3
3	Debit Card	2

3.1.5.5 Trip Satisfaction of Past Travellers

For both past travellers who headed to India and those who headed for other countries, level of trip satisfaction was excellent followed by good.

Table 17: Trip Satisfaction of past Travellers – India vs. Other Country

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
62%	Excellent	61%
32%	Good	37%
4%	Satisfactory	2%
1%	Poor	0%
1%	Very Poor	1%

3.1.5.6 Mode of Trip Booking of Past Travellers

For both past travellers who headed to India and those who headed for other countries, majority of trip bookings were done by the travellers themselves (through internet and over the counter).

Table 18: Mode of Trip Booking of Past travellers – India vs. Other Country

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
47%	Self (Internet)	52%
8%	Self (Counter)	11%
46%	Travel Operator /Agent	38%

3.1.5.7 Source of Booking Information for Past Travellers

The internet followed by travel portal is the most common source of information resorted to by all travellers.

Table 19: Source of Booking Information for Past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
23%	Travel Portals	23%
9%	Books	4%
24%	Websites / Internet	33%
10%	Brochures on Country	6%
9%	Country Tourism office in my own country	22%
14%	Friends / Relatives	12%
10%	Past Visits	0%

3.1.5.8 Type of Travel Agent Used by Past Travellers

For both past travellers who headed to India and those who headed for other countries, majority did their bookings through tour operators based in their own country.

Table 20: Type of Travel Agent Used by Past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
28%	Multi Country tour operator	24%
58%	Tour operator that operates in my own country	72%

8%	Tour operator in India	4%
7%	Freelance travel agents	0%

3.1.5.9 Type of Travel Arrangements Used by Past Travellers

Among past travellers who headed to India, a large percentage (25%) sought tailor made package arrangements from tour operators whereas travellers who headed to other countries, only 14% of them sought tailor made package as travel arrangements from tour operators.

Table 21: Type of Travel Arrangements Used by Past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
47%	Readymade package	54%
25%	Tailor made package	14%
0%	International Ticketing	1%
5%	Visa	9%
0%	MICE (Meeting, Incentives, Conventions, Exhibitions)	3%
0%	Cruise Services	3%
23%	Sight Seeing	16%
0%	Others	0%

Chapter Four

Prospective Outbound Travellers – Survey Findings

4.1 Prospective Outbound Travel Behavior

4.1.1 Profiling Information

4.1.1.1 Place of residence

The survey investigated 1000 respondents (persons who are intending to travel abroad) from Russia of which 62% of the travellers were from Moscow and 38% from Saint Petersburg.

Figure 50: Distribution of Past Travellers by Place of Residence

Map Source: *www.Russiamap.facts.co*

4.1.1.2 Gender Distribution

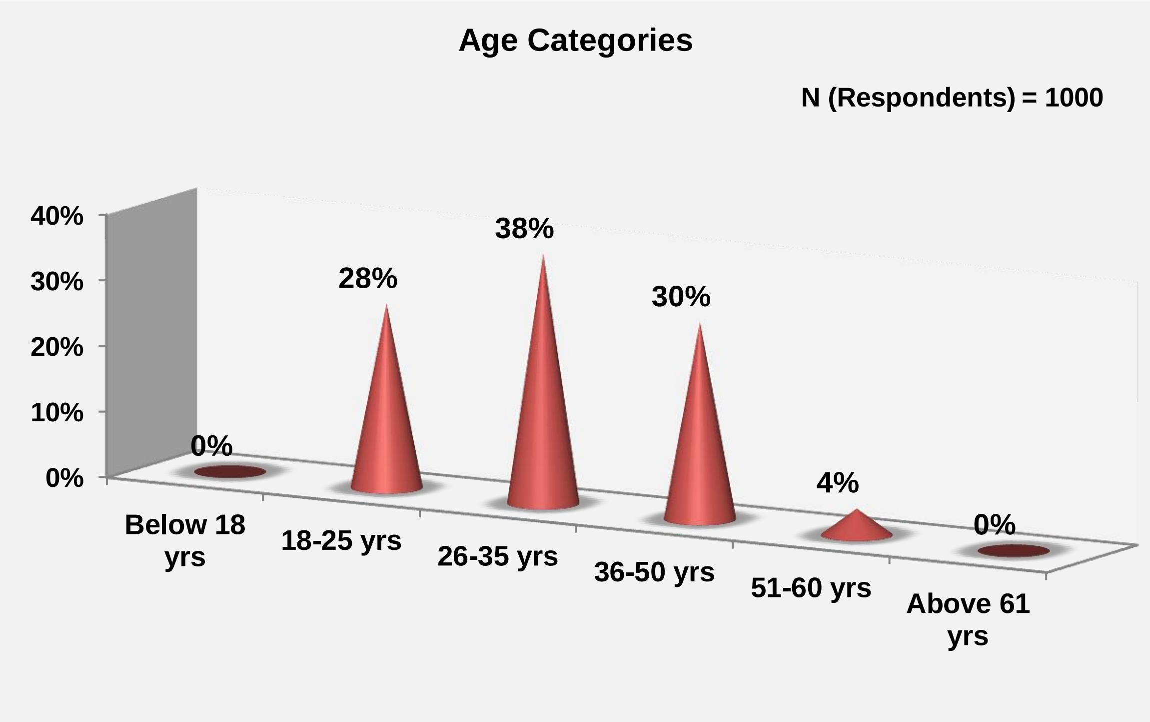
Women constituted only 24% of the total 1000 survey participants of intending travellers from Russia. Overall, 239 prospective female travellers were interviewed during the primary survey across the 2 cities.

Table 22 Respondents by gender		
Gender	No. of respondents	Percentage
Male	761	76%
Female	239	24%
Total	**1000**	**100%**

4.1.1.3 Age categories

38% of the respondents were between 26 to 35 years of age. 30% of the respondents were in the age group of 36 to 50 years. Overall, 68% of the respondents were in their peak productive years between 26 and 50 years of age.

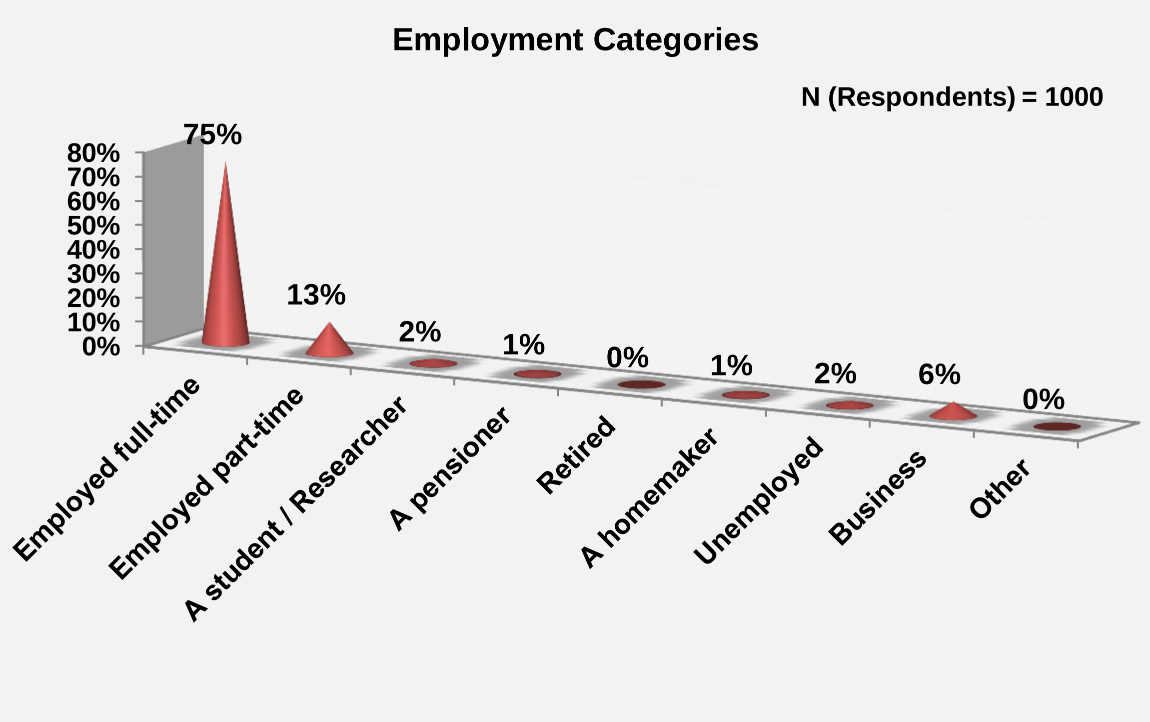
Figure 51: Age Categories



4.1.1.4 Employment status

75% of the total 1000 respondents were employed full time.

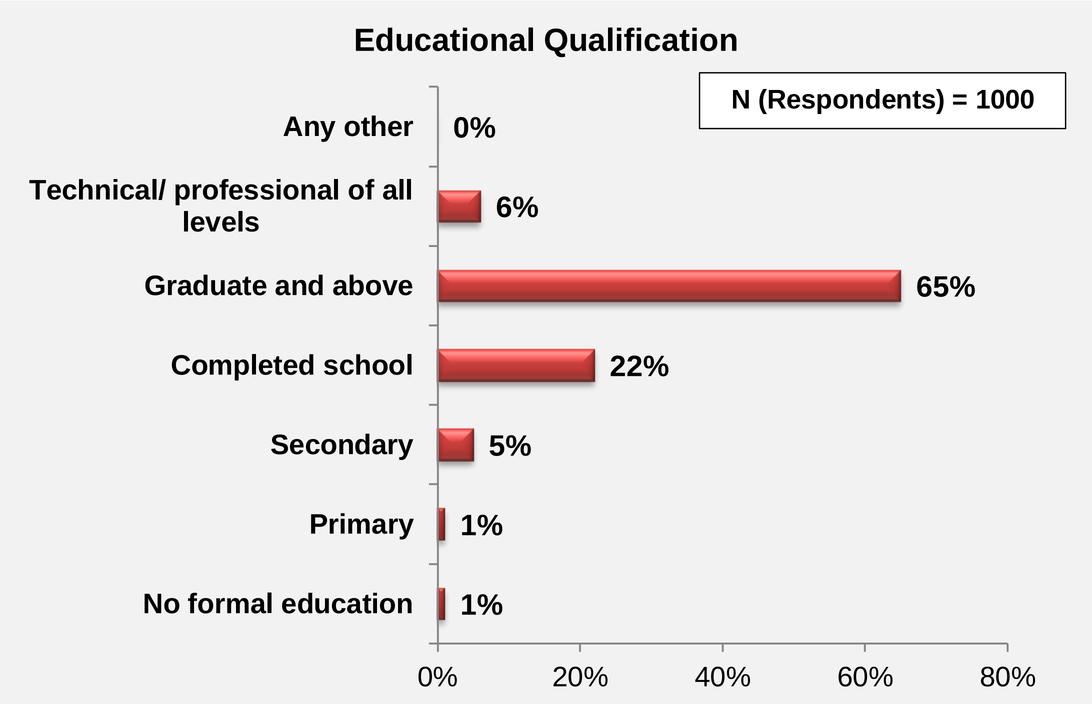
Figure 52: Employment Categories



4.1.1.5 Educational Qualifications

About 65% of the 1000 respondents were at least graduates or had some technical or professional qualification. So overall, the respondent universe was well-educated and aware.

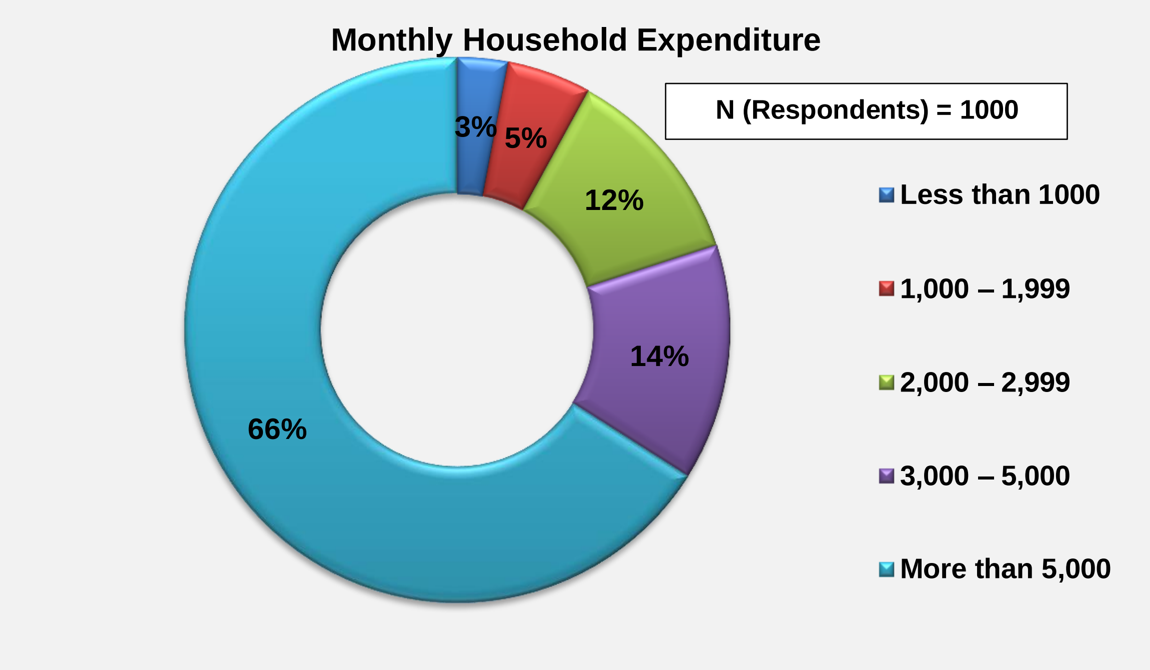
Figure 53: Educational Qualification



4.1.1.6 Household Expenditure per month

66% of the respondents mentioned that their monthly household expenditure was more than USD 5000.

Figure 54: Monthly Household Expenditure

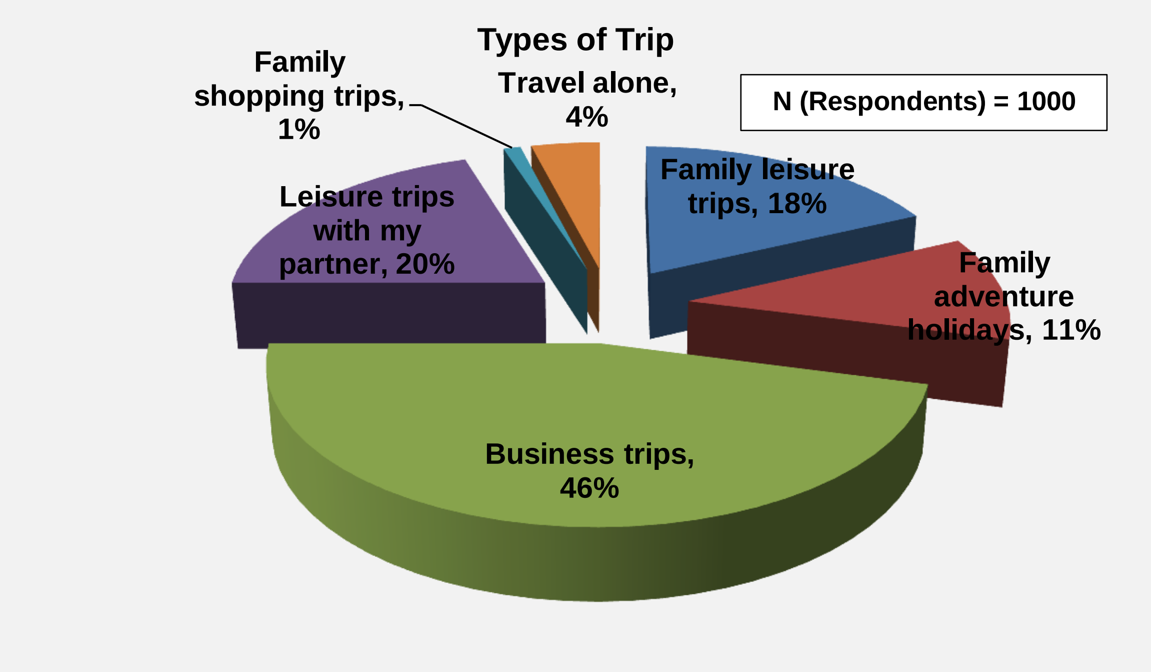


4.1.2 General Travel Behaviour

4.1.2.1 Types of trip

Majority of the respondents wish to primarily go on business trips. A considerable section also intends to go for solo trips leisure trip with spouse or partner (20% of 1000 respondents).

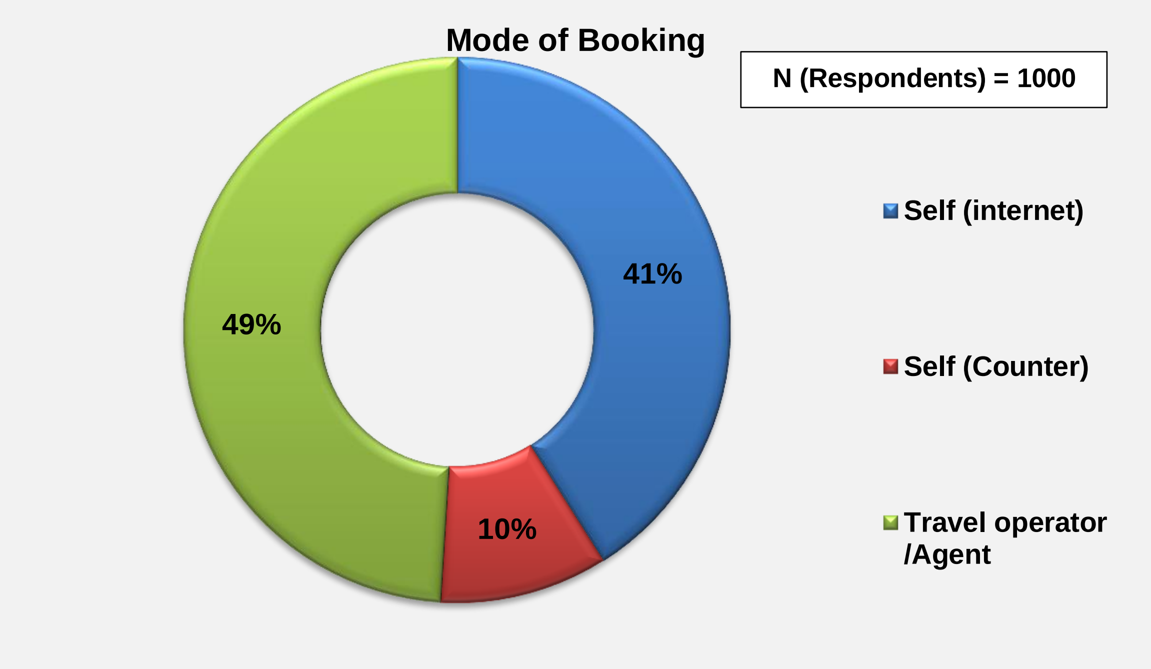
Figure 55: Respondents by purpose of travel



4.1.2.2 Mode of booking

41% of 1000 respondents mentioned that they would book their tickets over the internet while 49% expressed the intention of approaching travel agents. 10% of the 1000 respondents said that they would book their tickets themselves at the counter.

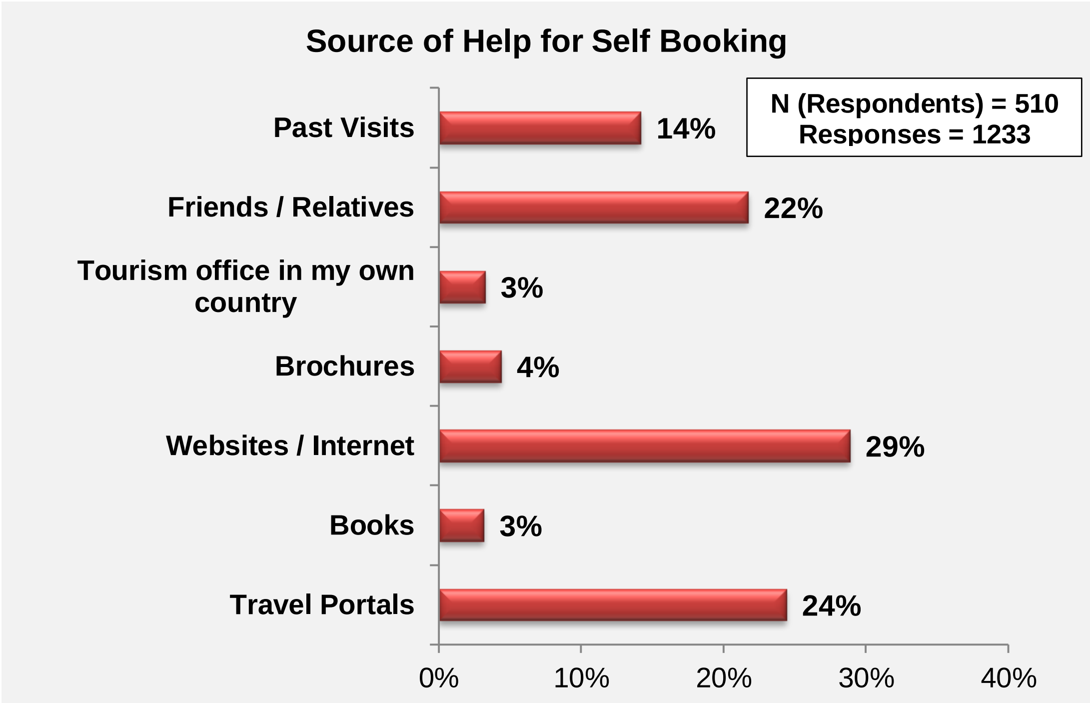
Figure 56: Mode of Booking



4.1.2.3 Sources of help for booking information

The 510 respondents who did not intend to consult tour operators were asked to indicate sources of assistance they would approach in order to book their tickets for the overseas trip (they were given the freedom to choose multiple options). 29% of the 1233 responses received revealed that the websites and internet was a very important source of information for travellers as well as a powerful tool for sorting out travel modalities. 22% responses showed that on occasion friends and relatives could also be consulted.

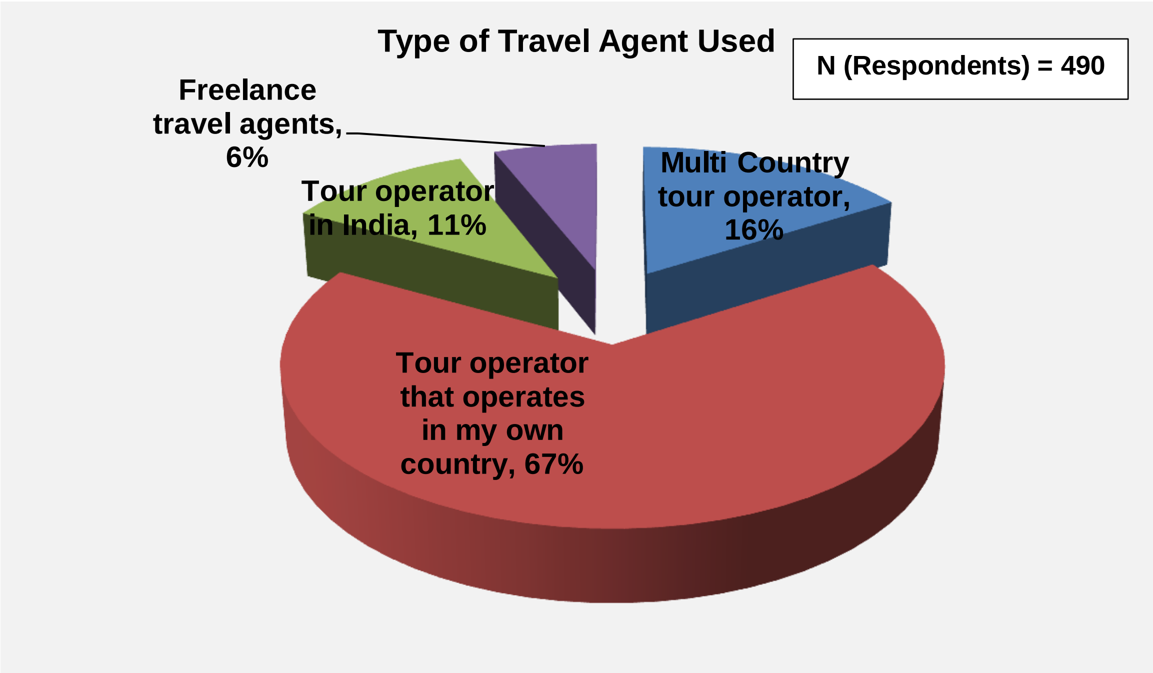
Figure 57: Sources of booking information



4.1.2.4 Type of tour operator used

Among those intending to approach tour operators for ticketing assistance, 67% said that they would approach operators from their own country. Another 16% were willing to approach multi-country operators. Only 11% mentioned that they would approach tour operators from India.

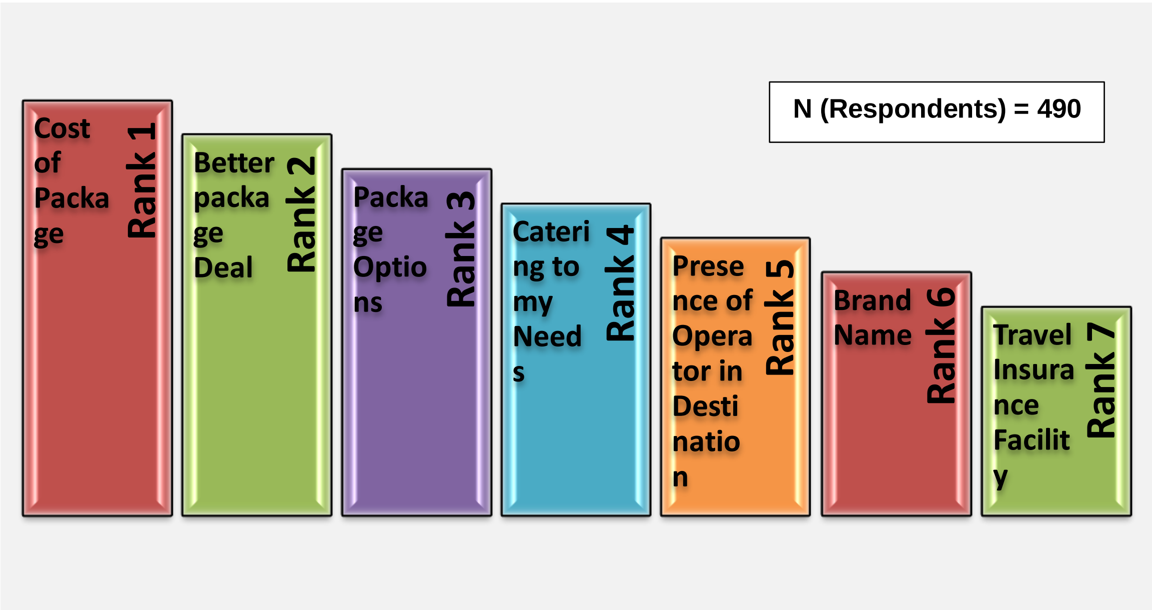
Figure 58: Type of Travel Agent Used



4.1.2.5 Tour operators selection criteria

For these 490 respondents, the cost of package was an important decision point in selecting the tour operator. This was followed by the better package deal of the operator.

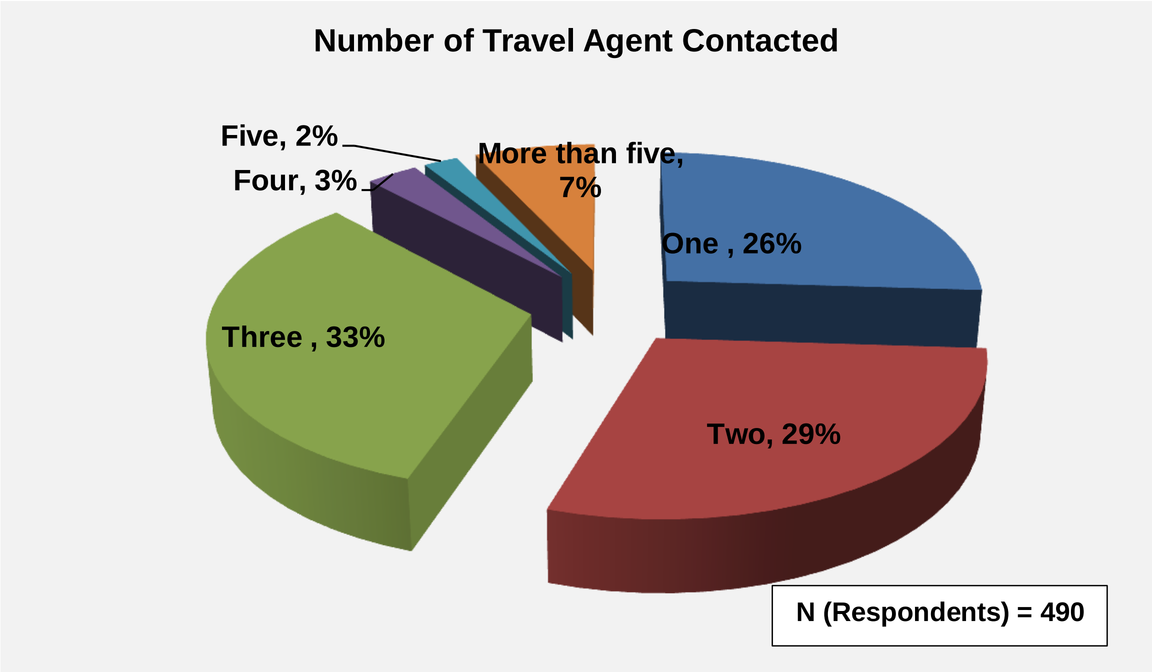
Figure 59: Tour Operator Selection Criteria



4.1.2.6 Number of tour operators contacted and number of months in advance contacted

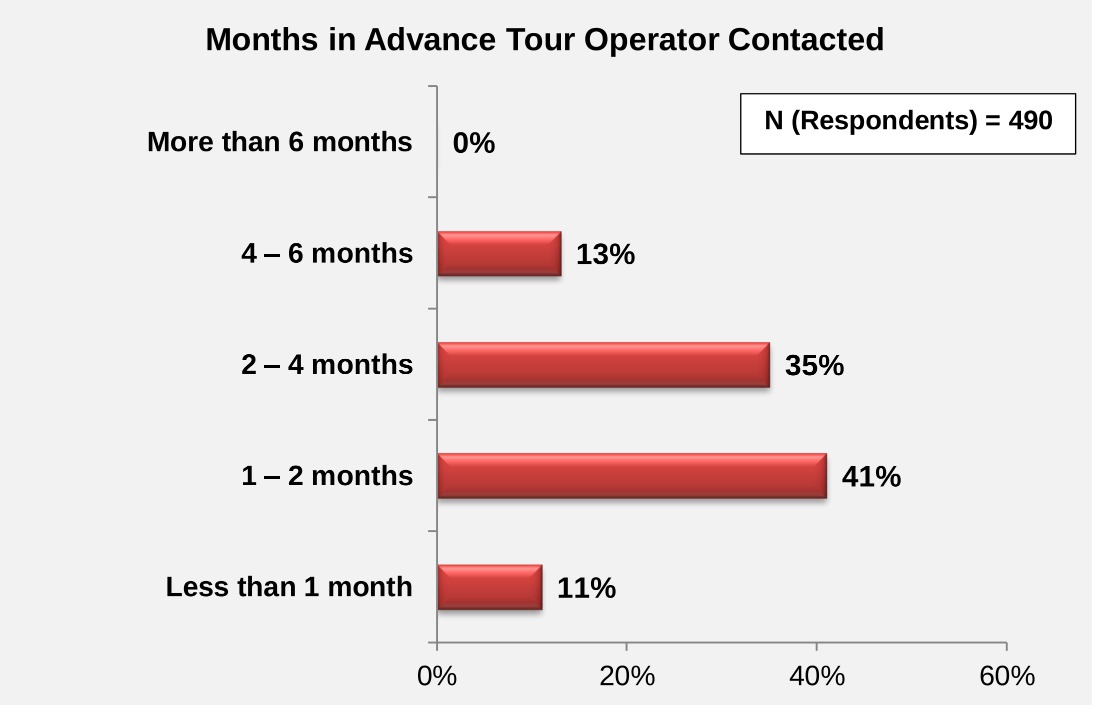
Of the 490 respondents who mentioned that they would approach tour operators, 29% said that they would contact at least 2 operators before reaching a decision. 33% expressed the intention of approaching 3 or more operators before they took a decision.

Figure 60: No. of tour operators the respondents intended to contact before coming to a decision



35% respondents mentioned that they would contact the travel operator at 2 to 4 months in advance. 13% respondents displayed intention of connecting with the tour operator 4 to 6 months in advance.

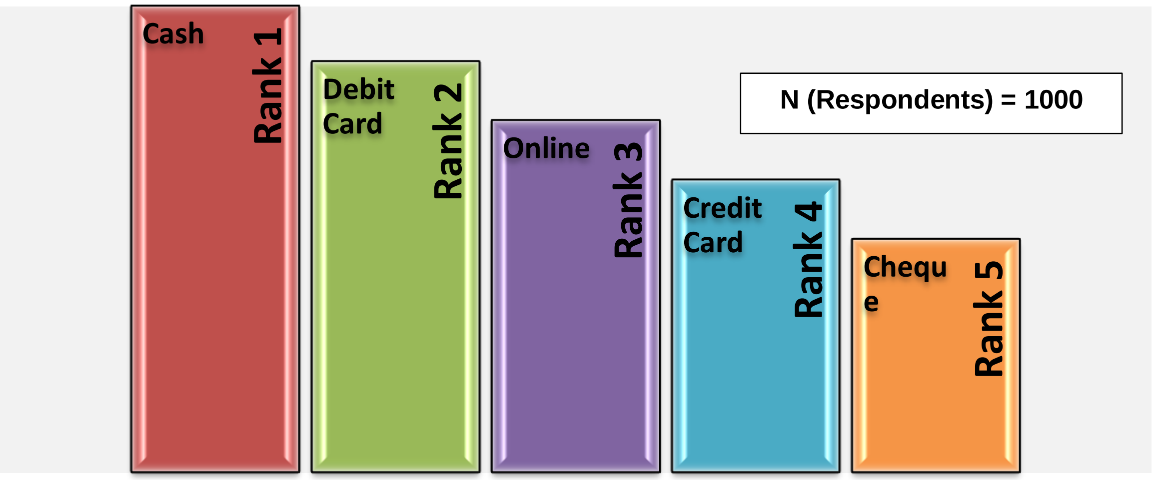
Figure 61: Months in Advance Tour Operator Contacted



4.1.2.7 Mode of payment preferred

Most preferred mode of payment for travelling abroad is through the cash route. This is followed by payment through debit card.

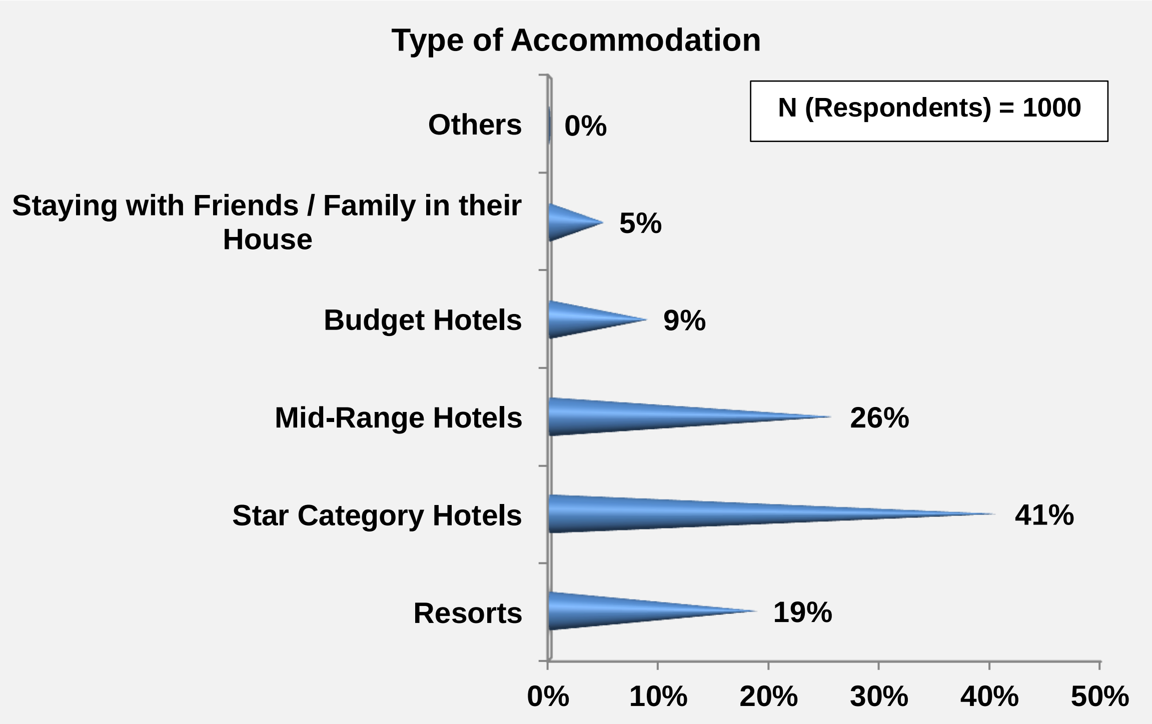
Figure 62: Mode of Payment Preferred



4.1.2.8 Type of accommodation to be availed

The 1000 prospective travellers were questioned about the type of accommodation that they would prefer during their trip. About 19% prospective travellers were willing to look at resorts rather than star category hotels while another 26% stated that mid-range hotels would be their preferred accommodation.

Figure 63: Respondents by type of accommodation

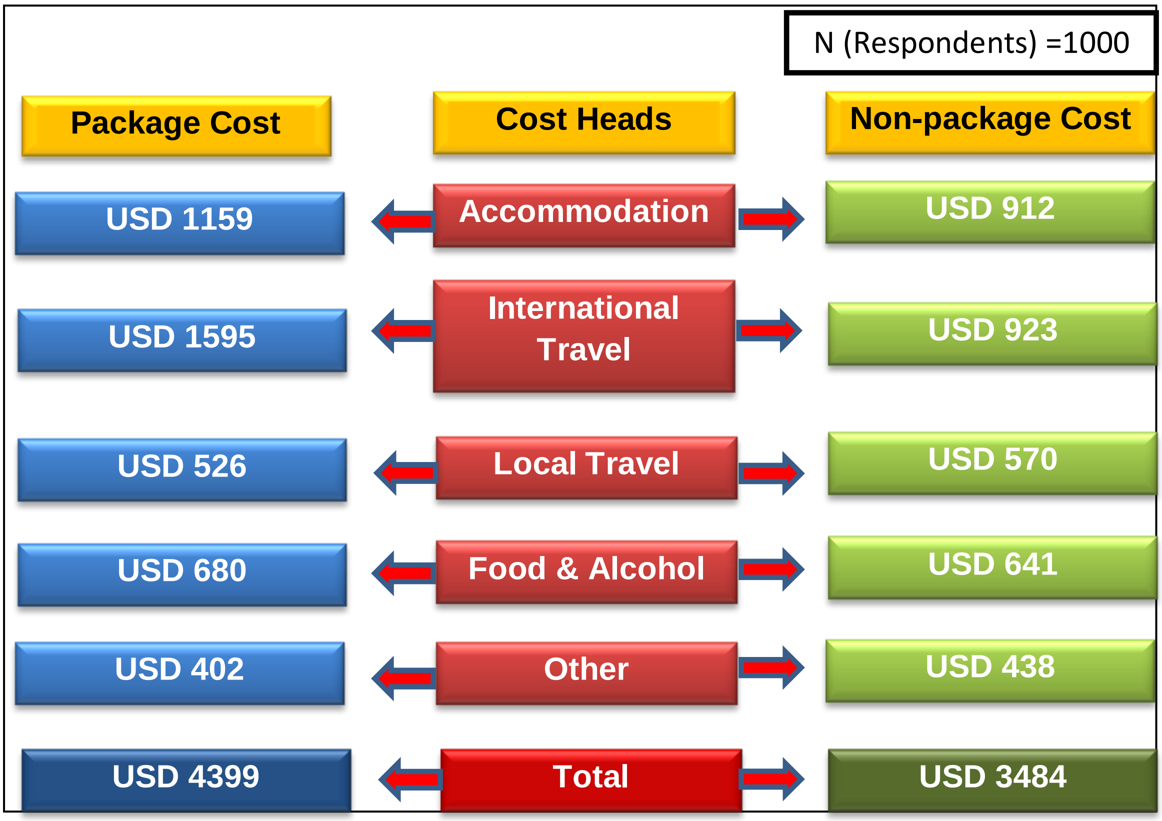


Note: Star category hotels: Hotels with more than 4 stars; Mid-ranged hotels: Hotels of 3 stars rating; Budget hotels: Hotels with 1-2 stars rating.

4.1.2.9 Estimated Package and Non-Package Expenditure Per Head

When the estimated allocation of travel budget across cost baskets is analysed, it is found that estimated expenses were more or less evenly spread across the four cost baskets of accommodation, international ticket, local travel and consumables for potential package travellers with a somewhat higher expenditure on international travel as opposed to accommodation expenses. This was prevalent for both package and non-package travellers.

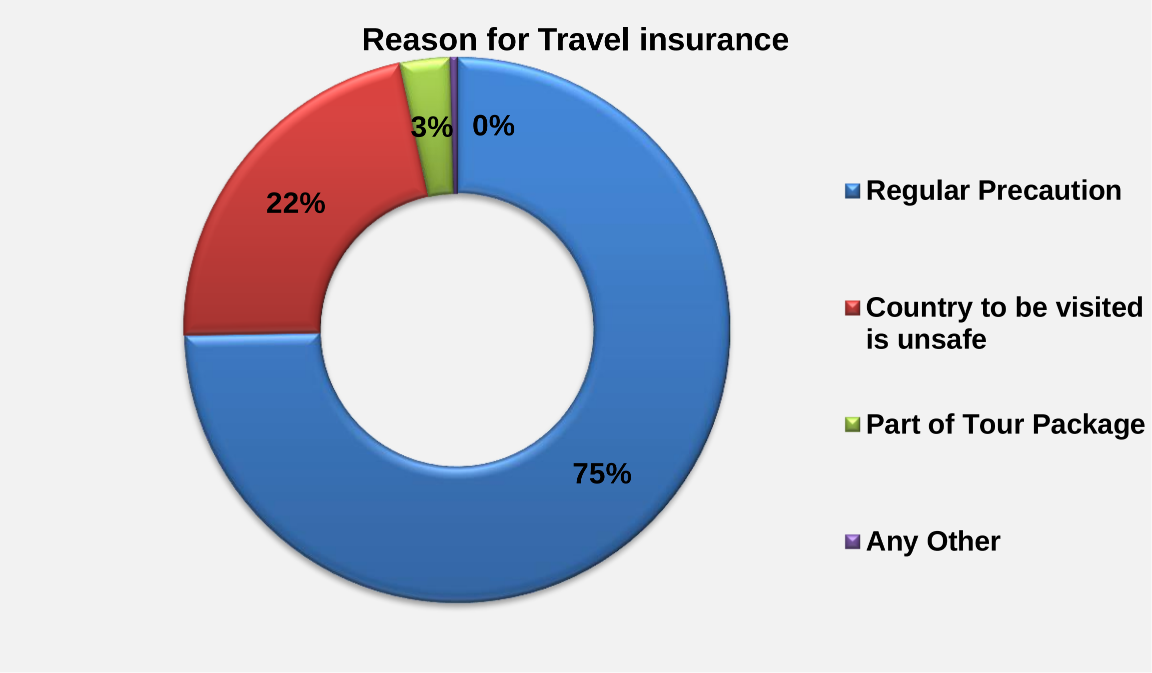
Figure 64: Expenditure across cost baskets



4.1.2.10 Reason for availing travel insurance if any

77% of prospective travellers (1000 respondents) wished to opt for travel insurance. Majority (75%) said that this was part of regular precaution they took while travelling.

Figure 65: Reason for Opting of Travel Insurance


Reason for Travel insurance
3%
0%
22%
75%
Regular Precaution
Country to be visited is unsafe
Part of Tour Package
Any Other

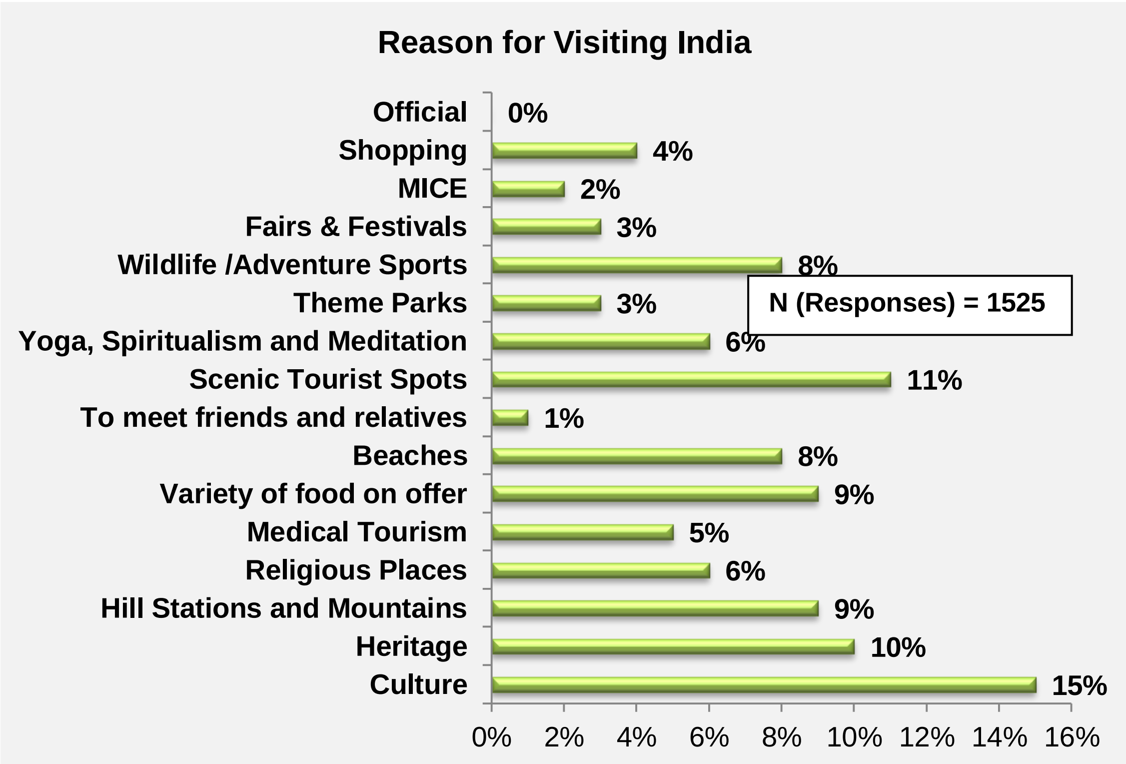
4.1.3 Travel Behaviour of Prospective Visitors to India

Of the1000 prospective travellers interviewed, 250 expressed the intention of visiting India in the near future.

4.1.3.1 Reason for choosing India as a travel destination

Respondents were asked to share their reasons for choosing India as a travel destination and they were given the freedom to choose multiple options. A total of 1525 responses were received from the 250 respondents of which 15% responses indicated the desire to see the culture of India as the driving reason.

Figure 66: Reason for choosing India for next trip



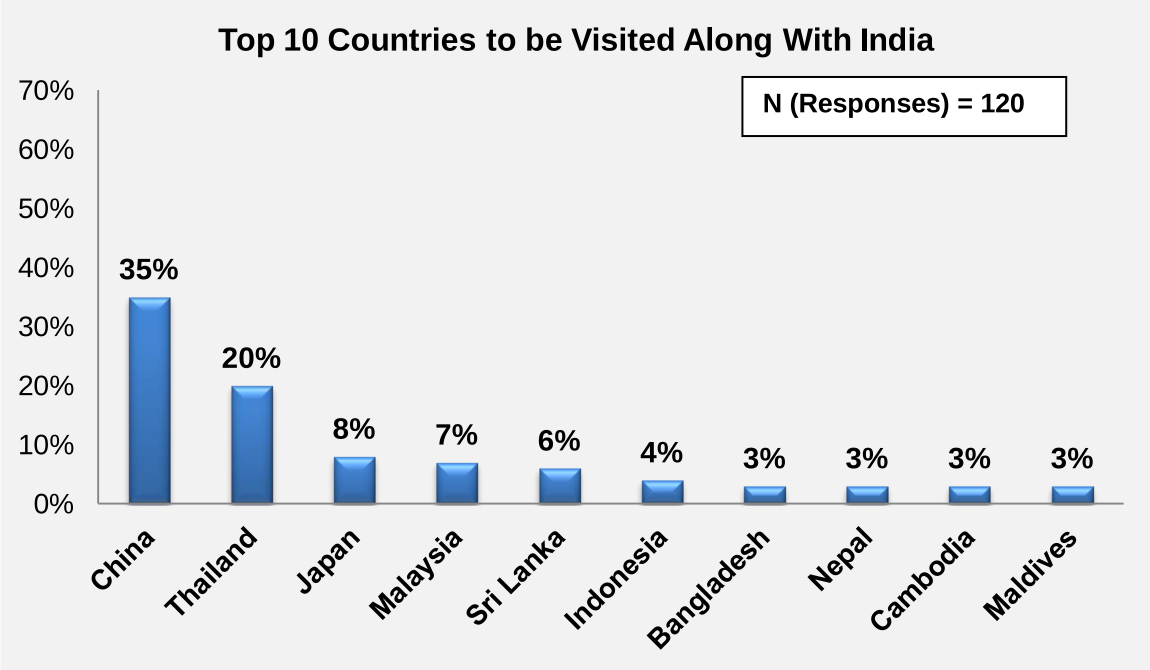
4.1.3.2 Intention of visiting only India or as part of a sub-regional trip

73% of these 250 respondents intended to visit India only and not as part of a regional tour to South Asia.

4.1.3.3 Countries Planning to Visit Along With India as part of a sub-regional trip

35% of these 68 respondents intended to visit India as part of a regional tour to South Asia mentioned China in their schedule.

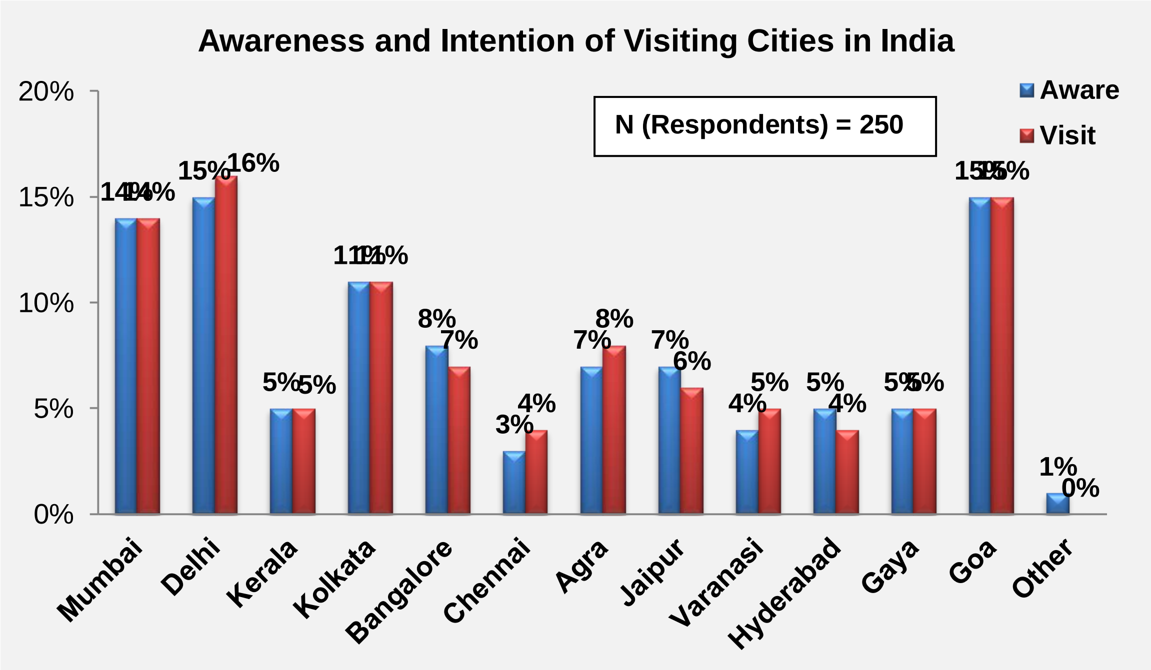
Figure 67: Top 10 Countries to be visited along with India



4.1.3.4 Awareness and intention of visiting destinations in India

The 250 respondents were queried about the cities they were aware of and planning to visit during their next trip. The destinations travellers were most aware of were revealed to be Delhi, Mumbai and Goa. Examination of the responses shows 16% of the persons wanted to visit Delhi, 15% to Goa while 14% wanted to visit Mumbai.

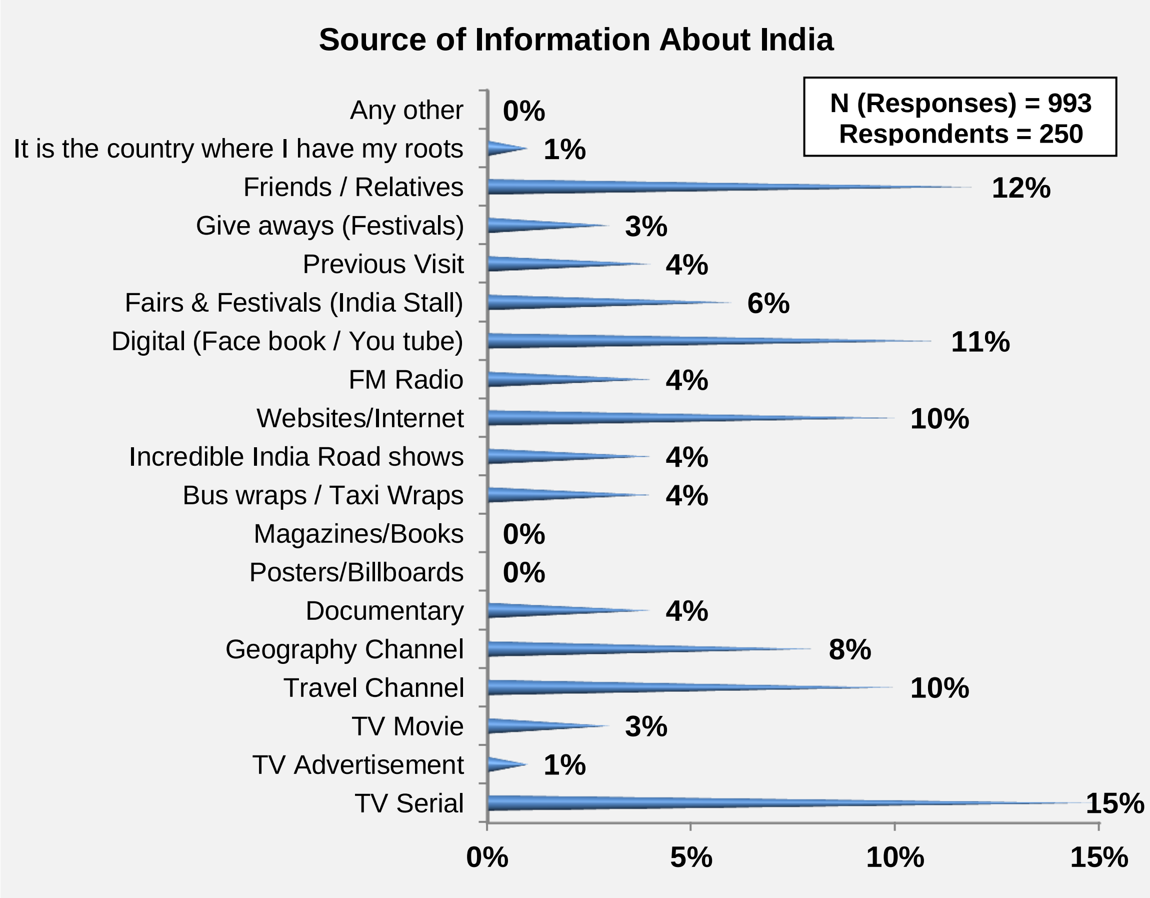
Figure 68: Awareness about a destination and its traction for the visitor



4.1.3.5 Source of information regarding India

Respondents were asked to indicate their source of information about India and they were given the freedom to select multiple options. Travellers, who planned to visit India in the near future, have largely known about India through TV; about 15% of responses received indicated this. 12% of all responses indicated that friends/ relatives were an important source of information.

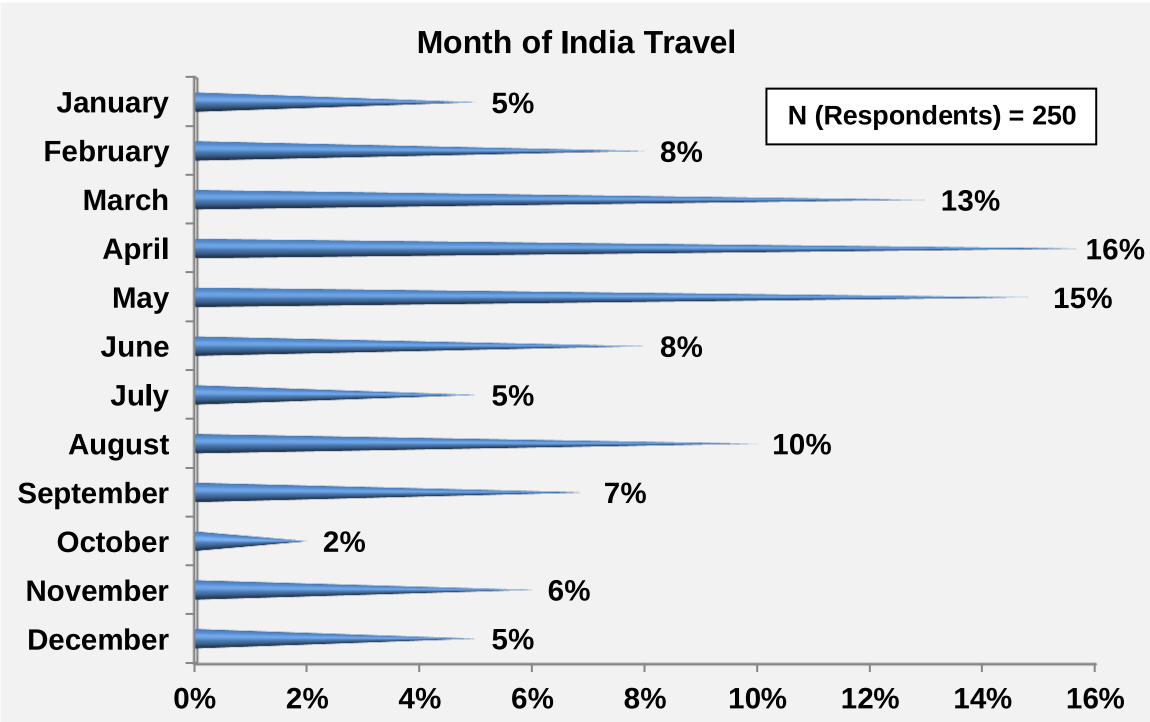
Figure 69: Sources of information about India



4.1.3.6 Time of visit to India

The most popular month for travel is April, followed by May.

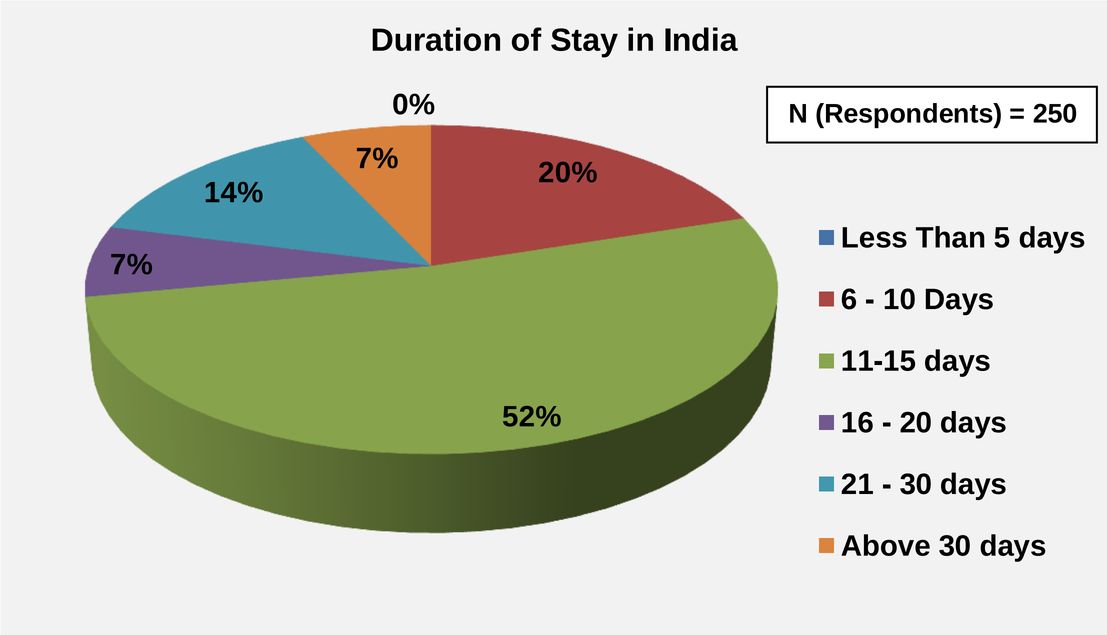
Figure 70: Preferred month for potential visit to India



4.1.3.7 Duration of stay

52% of the 250 respondents intend to stay for a period of 11 to 15 days in India. 20% intended to stay for 6 to 10 days.

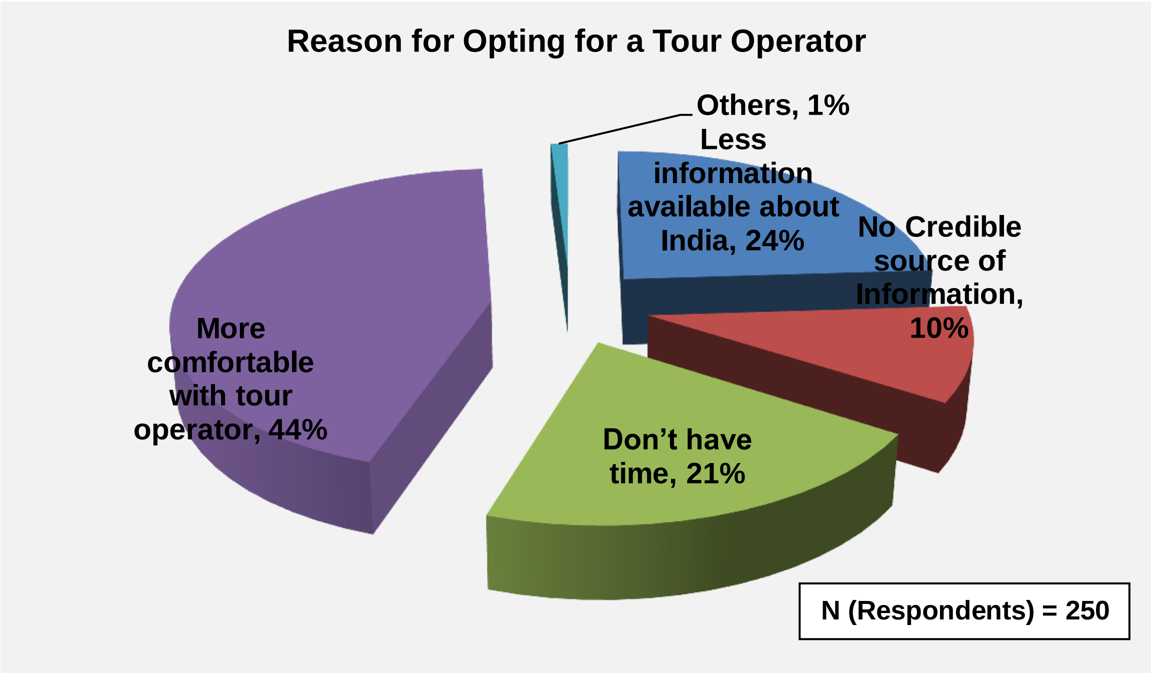
Figure 71: Duration of Stay in India



4.1.3.8 Reason for booking through a tour operator while visiting India

From the 250 respondents who planned to come to India in their next visit, majority of the respondents mentioned they were more comfortable with tour operator for their India trip.

Figure 72: Reason for Opting for a Tour Operator



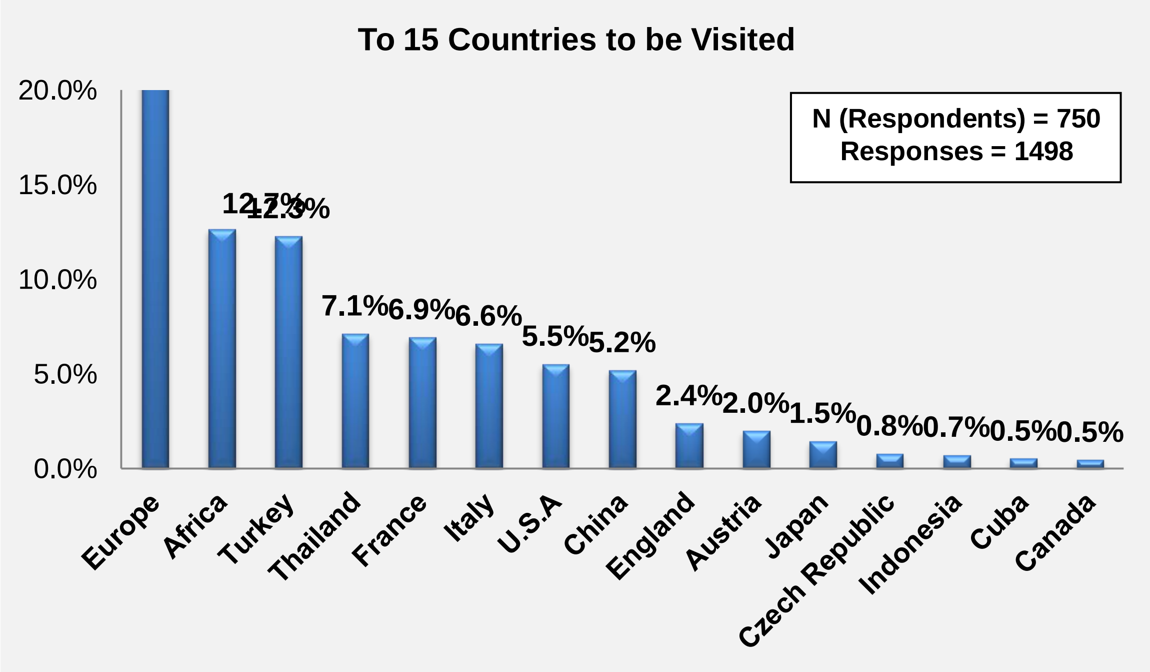
4.1.4 Travel Behaviour of Prospective Visitors to Other Countries

Of the 1000 prospective travellers interviewed, 750 expressed the intention of visiting countries other than India in the near future.

4.1.4.1 Countries to visit

Among these 750 respondents, top favoured destinations were Europe, Africa, Turkey, Thailand, and France.

Figure 73: Favored destinations for those intending to travel to countries other than India



4.1.4.2 Drivers / reasons for visiting foreign locales

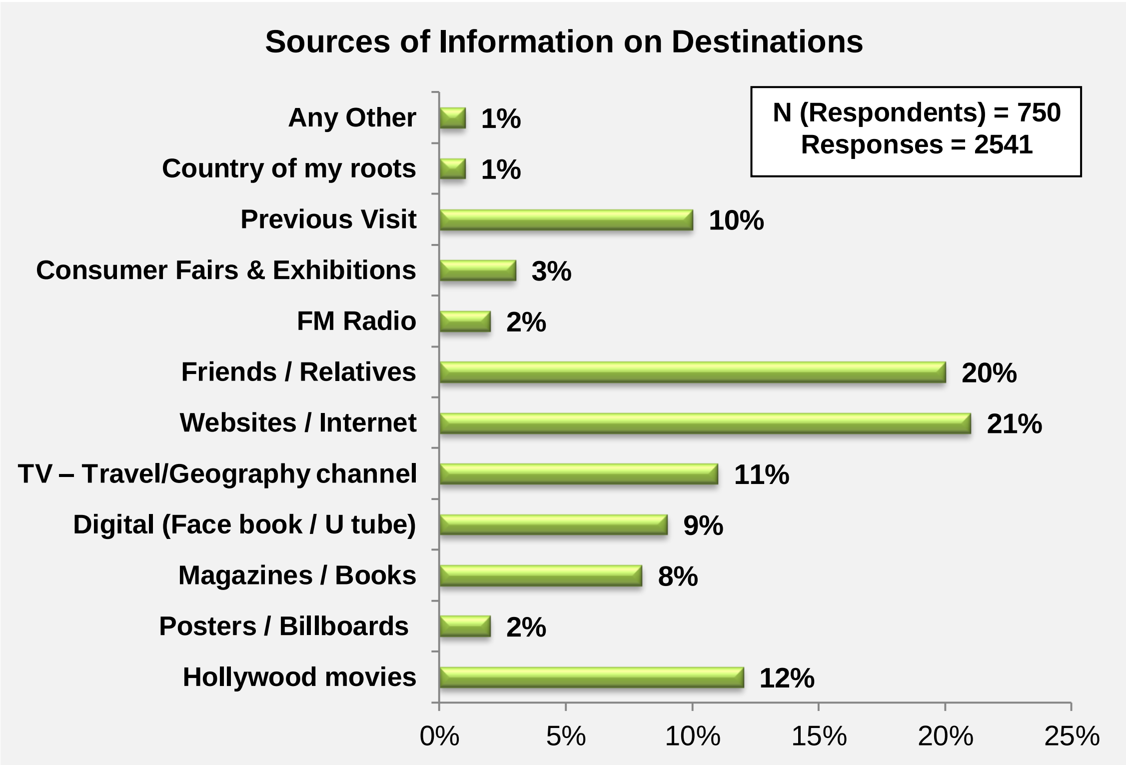
Respondents were asked the main reasons why they intended to travel overseas in the near future. The top most reason for travel was cited as leisure/recreation (70% respondents of 750). The other important driver was visiting for business (20% of 750 respondents).

Figure 74: Reason for travelling overseas

4.1.4.3 Sources of information on the destinations to visit

Respondents were asked to list the sources of information they intended to tap to know about their destination countries. They had the freedom to select multiple options. 2541 responses were yielded by 750 respondents. Important sources of information regarding destination countries are internet followed by friends/ relatives — 21% and 20% of responses respectively.

Figure 75: Sources of information about destination countries



4.1.4.4 Awareness of India as a tourist destination

71% of 750 respondents were aware of India as a potential destination before they took their decision to head elsewhere.

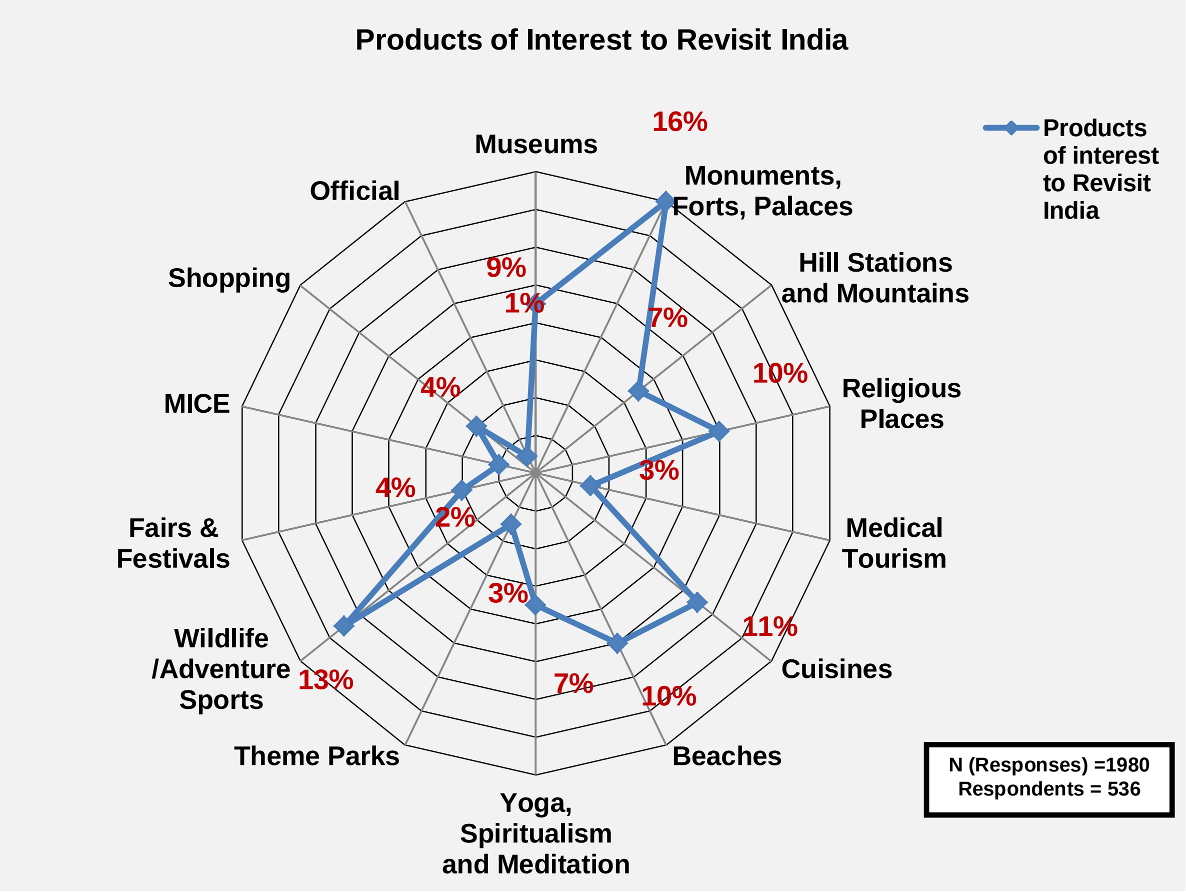
4.1.4.5 Intention of visiting India

About 72% of the 750 respondents expressed their intention to visit India next time. 656 respondents were clear that they would not be visiting India is any subsequent visit.

4.1.4.6 Primary attractions of India / motivation for visiting India

Those 536 respondents, who expressed interest in visiting India in subsequent trips, were asked about the primary attractions that they perceived to be offered in India. The query elicited 1980 responses as multiple options were permitted. They evinced interest in India's monuments, forts and palaces as the most attractive motivation (16% of responses).

Figure 76: Primary attractions in India

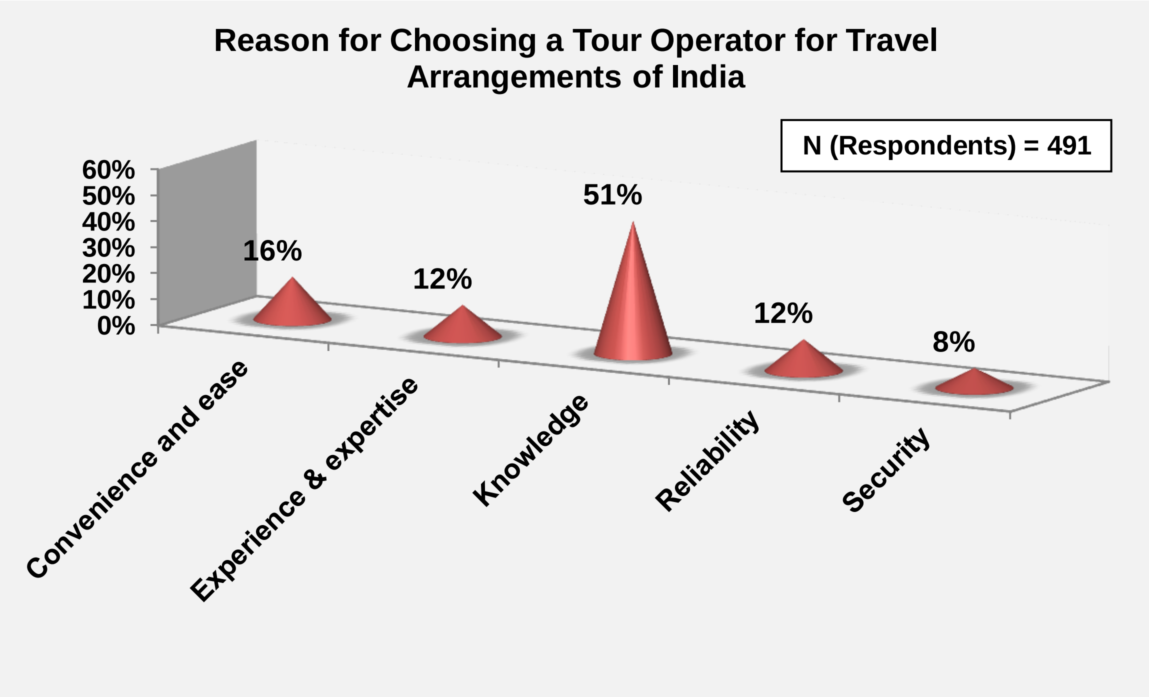


4.1.4.7 Intention and reason for choosing an intermediary for India travel

35% of the total 750 respondents felt that if they were to visit India, they would plan it themselves rather than go through a tour operator. Out of the total 750 respondents, 491 persons expressed their intention of hiring a tour operator.

51% felt that the intermediary would provide better knowledge about India and has more information of India. Another 16% felt that going through a tour operator would provide convenience and ease.

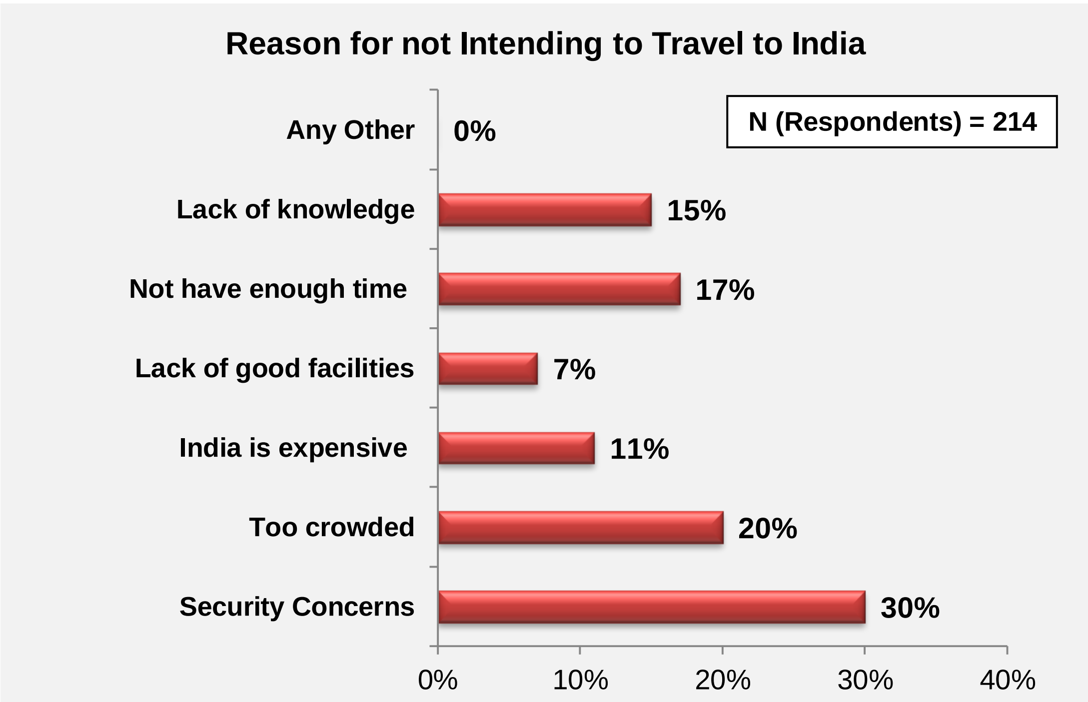
Figure 77: Reason for Choosing a Tour Operator for Travel Arrangements in India



4.1.4.8 Reasons for rejecting India as a tourist destination and intention of India visit in far future

The 214 respondents who were clearly disinclined to visit India were asked about their reason for not visiting India. The driving reasons for not planning a visit to India lay in safety and security concerns in India (30% respondents).

Figure 78: Reasons for not intending to travel to India



But 86% respondents, at the end of the interview mentioned that they would indeed like to visit India at some point in the future, if not immediately.

4.1.5 India vis-à-vis other Countries - Prospective Outbound Travel Behaviour

4.1.5.1 Accommodation Availed by Intending Travellers

Among prospective travellers who are headed to India, a large percentage (49%) planned to stay in star hotels whereas travellers who are headed to other countries, 38% planned to stay in star hotels.

Table 23: Accommodation Availed by Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
24%	Resorts	17%
49%	Star Category Hotels	38%
19%	Mid-Range Hotels	28%
6%	Budget Hotels	10%
2%	Staying with Friends / Family	7%
0%	Others	0%

4.1.5.2 Package Expenses of Intending Travellers

Travellers to India will incur a higher average per capita package expense (**all costs in US$**) than those travelling to other countries.

Table 24: Package expenses of Intending Travellers – India vs. Other Country

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
1117	Accommodation	750
1605	International Travel	1591
563	Local Travel	514
698	Food including alcohol	673
426	Others	393
4409	Total	3921

4.1.5.3 Non-Package Expenses of Intending Travellers

Travellers to India will incur a higher overall average per capita non-package expense (**all costs in US$**) than those travelling to countries other than India.

Table 25: Non-Package Expenses of Intending Travellers – India vs. Other Country

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
871	Accommodation	926
938	International Travel	918
617	Local Travel	554
637	Food including alcohol	643
439	Others	437
3502	Total	3478

4.1.5.4 Preferred Mode of Payment of Intending Travellers

For both prospective travellers who are headed to India and those who are headed for other countries, the most preferred mode of payment was cash followed by debit card.

Table 26: Preferred Mode of Payment of Intending Travellers – India vs. Other Country

Intending Travellers to India	Payment Mode Categories	Intending Travellers to Other Countries
1	Cash	1
5	Cheque	5
3	Online	3
4	Credit Card	4
2	Debit Card	2

4.1.5.5 Mode of Trip Booking of Intending Travellers

For prospective travellers who headed to India majority of trip bookings were done by the travellers themselves (through internet and over the counter) and those who are headed for other countries, majority of trip bookings were done by the tour operators.

Table 27: Mode of Trip Booking of Intending travellers – India vs. Other Country

Intending Travellers to India	Payment Mode Categories	Intending Travellers to Other Countries

53%	Self (Internet)	37%
9%	Self (Counter)	11%
38%	Travel Operator /Agent	52%

4.1.5.6 Source of Booking Information for Intending Travellers

The internet and travel portal is the most common source of information resorted to by all travellers.

Table 28: Source of Booking Information for Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
28%	Travel Portals	22%
5%	Books	2%
26%	Websites / Internet	31%
6%	Brochures on Country	3%
7%	Country Tourism office in my own country	1%
18%	Friends / Relatives	24%
10%	Past Visits	17%

4.1.5.7 Type of Travel Agent Used by Intending Travellers

For both prospective travellers who headed to India and those who headed for other countries, majority (56% and 70% of respondents for India and Other countries respectively) did their bookings through tour operators based in their own country.

Table 29: Type of Travel Agent Used by Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
28%	Multi Country tour operator	13%
56%	Tour operator that operates in my own country	70%
10%	Tour operator in India	11%
5%	Freelance travel agents	6%

Chapter Five

India Tourism Office – Survey Findings

5.1 India Tourism Office

The survey had specific focus on the impact of the promotional activities of India Tourism Office. However there is no particular office of the India Tourism in Russia and currently only a representative of the India Tourism Office looks after the affairs of promotion of India in Russia. Hence evaluation of India Tourism Office is not presented for the country of Russia.

Chapter Six

Future Outbound Travel Projections

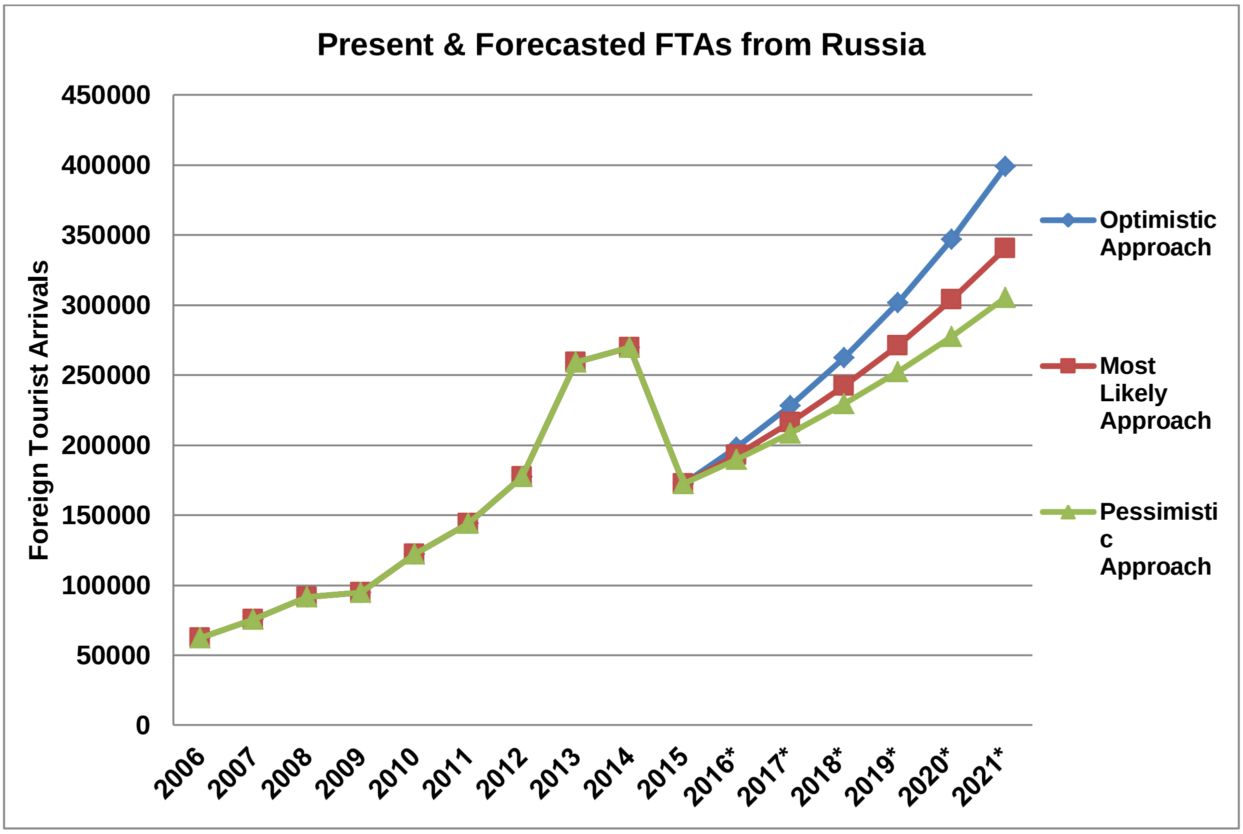
6.1 Projections for Future Outbound Travel

6.1.1 Method of Forecasting

To arrive at the future trends of FTA's we have considered three possible approaches i.e. "***Most Likely Approach***" which is the approach based on the current growth trends- we have considered a compounded average growth rate (CAGR) of 12% for the period 2006 to 2015. "***Optimistic Approach***" assuming that all factors considered for the forecast grow at a constant rate- we have taken the rate at 15%. "***Pessimistic Approach***" - assuming the possibility that any future calamity can affect the factors considered- we have taken the rate as 10%. These approaches are captured in the forecast illustration below.

6.1.2 Forecast of Outbound Tourists from Russia

Figure 79: Present & Forecasted FTAs from Russia



The above data in tabular format is as presented below.

Table 30: Present & Forecasted FTAs from Russia to India

Years	Optimistic Approach	Most Likely Approach	Pessimistic Approach
2006	62203	62203	62203
2007	75543	75543	75543
2008	91423	91423	91423
2009	94945	94945	94945
2010	122048	122048	122048
2011	144312	144312	144312
2012	177526	177526	177526
2013	259120	259120	259120
2014	269832	269832	269832
2015	172419	172419	172419
2016*	198282	193109	189661
2017*	228024	216282	208627
2018*	262228	242236	229490
2019*	301562	271305	252439
2020*	346796	303861	277683
2021*	398816	340325	305451

*predicted values

Note: To arrive at these figures, the base years considered are 2006 to 2015 (both inclusive).

Please note that these figures were arrived assuming that economic, social and political conditions of both India and Russia will remain as it was during the time period based on which these figures have been projected. Occurrence of any contingency or event might affect the figures as given above.

Chapter Seven

Conclusion & Way Forward

7.1 Conclusion

Conclusion:

The study of 3000 travellers and tour operators was conducted in the Russian cities of Moscow and Saint Petersburg. These 3000 travellers consisted of 2000 past travellers and 1000 prospective travellers. Utmost care was taken so as to not include NRIs/ PIOs as their responses might have skewed the trend of other perceptibly impartial travellers in terms of their knowledge of India and reasons for visiting India. However, it was found out from the study that Russians are very aware of India and they perceive India as a beautiful place of culture and heritage. The top of the mind impression of India for Russians is Goa, Mumbai, Taj Mahal, etc. For the Russian Indian Food and beaches, culture, heritage etc. is a very attractive draw to come and visit India.

This positive impression of India is also dotted with some negative aspects which primarily do not convert the intention of visiting India to actually visiting India. Some of the negatives aspects of India, as per the Russian travellers are the fact that there is no comprehensive information available about India. Even when they have heard from friends and relatives about India and go to any travel agent for information on India, they do not get any information. The travel agents and tour operators in Russia are not having any information on India and are not able to help travellers who are interested in visiting India. Since information is not present, the travellers grow apprehensive about travelling to India and hence drop their plans. In this way conversion of travel interest to actual travel is not happening. Moreover since there is not India Tourism office present in Russia, the travellers and trade alike do not know who to go to for travel information regarding India. Also lack of advertisements, billboards and events on India also make travellers averse to planning an India trip. Many of the travellers mentioned that they were not aware that Goa was a part of India as they have seen advertisements of Goa separately and not as under India campaign.

The travellers interviewed mentioned that they preferred to book on their own when travelling but in case of India, they are more comfortable booking through a tour operator as they are not sure about India, so prefer an agent who has experienced India, can tell them about India. Food, though an issue with many western travellers to India, for Russian travellers Indian food is very interesting. India, to Russians is a country of extremes and they find it as a very intriguing and attractive facet of India.

The maximum time Russians can spend for holidays are 10 to 12 days at a stretch young generation. So the prominent destinations for vacation with family and friends are mainly Turkey, Egypt, Dubai, Cyprus, Spain and most of the travellers plan their trip on their own and is on an average 30 to 45 days in advance. Generally when they travel they do the entire booking as well as itinerary on their own through internet and web sites, but they are not aware if this is possible in case of India. There is lack of information on India so they are not sure how and where to travel. Kerala back waters and Ayurveda is also picking up as a preferred destination for Russian tourists. The major source of information for Russian travellers is the TV and internet. Promotion by a Russian celebrity in Russian shall make an impact. This needs to be repeated frequently with different themes/destinations so as to raise interest and remove the apprehension of India Tourism.

As per the trade, the top destinations for Russians are Turkey, Egypt, Dubai, Cyprus, and Spain. One tour operator quipped "*As of now due to the travel advisory from Russian Government regarding Egypt and Turkey, India is a very good potential market (Nov to Jan) which needs to be tapped properly and aggressively and need to act fast*". As regards India, the majority of the Russian tourist traffic is for Goa. Currently there is information gap and no resource material available. No tourist office in Russia so the trade have no one to ask for information. There is a need for recognised and accredited travel agents who have the necessary knowledge and information about India (where to go, how to reach, how many days it shall take , connectivity, what to see, what shall be the cost). There is a need to focus on specific needs of the Russian market as they need customised service.

Russians love to travel to Goa to sun bath / for a beach holiday for 15 to 20 days. But there are certain issues such as

- The agents cannot sell tickets separately, it has to be with the package

- As majority take charted flights, the travellers cannot switch flights in case they are going from Goa to any other destination
- There is no provision of crossing flights of different charters
- Also, travel agents cannot sell one way charted flight ticket
- Lack of hotels near Goa and Tadoba, which is a favourite destination for them
- Agents cannot market Villas as some travellers are interested in relaxing in villas as they need permission for villas. Besides this there are no villas in North Goa.
- There is no direct flight to Goa and also its 1 stop or 2 stop via flights.
- In case of any problem there is no local help or tourist police available for the same

Kerala is also picking up as a destination in Russia as per travel agents. Kerala is mainly for yoga, Ayurveda and spiritualism but there is no direct flight. Qatar/ Etihad have direct flights but are too expensive. One of the issues in Kerala is inventory of hotels. There is a need for the Russians to have a special place in the hotel for entertainment of children – Children club so that they can enjoy there and the adult members can enjoy on their own.

The trade feels that there is a need to promote WELCOME TO INDIA. To promote that India is safe. The ministry should provide positive information about India from time to time. Also there are no direct flights to any of the popular destinations and agents need Airline support to promote India tourism in Russia. One agents mentioned "*Need brochures and maps in Russian language as English is difficult for Russians especially for – Mumbai, Kerala, Jaipur, Goa. The Indian tourism office is in Frankfurt and one of the officers is there for the Russian market but he sit over there, he is not available in Russia if there is any requirement from trade or traveller no one to guide*". The other major issue is Direct sellers have no knowledge about India, no support from India Tourism and no idea of any destination. Hence there is a need to carry out some special event for customers /travellers wherein India is show cased, new things happening in India, what India is all about – culture, festivals, food, yoga so that they can visualise the real image of the country. A day on India wherein some dances, festivals, and cuisine is show cased, some presentation to show what to expect in India.

Roadmap to Improve Promotional Activities:

- Travellers are aware about India but, have no information on India to plan their travel. The information provided needs to be more comprehensive and clear. Travellers feel the need of a travel itinerary.
- Travel agents and tour operators in Russia need to be connected with regularly and information on India needs to be provided to them regularly so that they can inform travellers interested in visiting India. Currently Russian travel agents are not having much information of India
- All the required information is available on the website of Incredible India, but the website needs to be more focussed, product driven and clear so that travellers can decide their destination and can compare India vis-à-vis other competitive countries. The Campaign should be focused more to lure the intending travellers to "Welcome to India" rather than simply describing India
- Promotions are required either on Billboards/subway
- Interaction with Tour operators of Russia is essential, as of now there is no continuous interactions
- A 1 to 2 min promotion campaign by a Russian celebrity shall make a great impact
- There is a need to organise Fam tours - Rajasthan, Vrindavan/Barsana
- Travellers only aware of Goa, Taj Mahal, & Kerala. So, more destination specific visuals/ campaigns defining the products and its unique features need to be devised and promoted. Rather than marketing India or just one state to the trade, focus should be on marketing a product /activity/ event. Under the umbrella of brand India new tourist circuits need to be created to attract different type of travellers. Segment specific products i.e. different products and packages for adventure tourists, family travellers, business travellers, medical tourist's etc. need to be offered. Thus there is need to focus separately for the 3 different stakeholders.
- The *"Incredible India"* website needs to be upgraded regularly. The content of the website also needs to be reviewed periodically and new destinations/ products/ circuits need to be brought to the knowledge of the travellers. Promotional campaigns need to highlight the Incredible India web-address

more prominently. There is also a need to increase the visibility of the website.

Trade/ Tour Operator:

Focussing on trade and forming a symbiotic relationship with trade will foster a greater number of foreign tourist visits to India. It is also suggested that more liaising with Russian tour operators and training them about Travel in India are facilitated by the India Tourism Officer in Russia so as to increase the tourist traffic to India. It is also suggested to improve the number of tour operators who sell India by providing free training and tutorials for tourism in India by Ministry and motivate them to work for 'India Tourism Office'. India Tourism Office must project a permanent person in Russia who can be contacted for any information on India. India's participation in important fairs and festivals is required where they can sponsor any event which will finally send a message to "*Welcome to India"*. More communication with tour operators is required with regards to events that can be organized to boost tourism to India. Regular updates to trade should be done regarding visa rules, changes in any rules and regulations in India, new destinations, new property, new facilities, etc. so that the constant information flow is present amongst the trade from the Indian Tourism Office.

Media:

Media is a medium that can be used to make people aware about India. Media reaches the masses and hence is a very important tool of promotion. Currently the advertisements of Incredible India campaign are not present. Also the Local channels in Russia, which are most watched by the potential travellers are not showing India Tourism advertisements. The media advertisements need to focus on the various products that India has to offer assuring that India is a safe and secure country to visit and can also showcase the unique blend of modern and traditional experiences that India has to offer. Media can also take the help of Russian celebrities and famous personalities to promote India.

Traveller:

More efforts need to be put in creating promotional campaigns which will increase footfalls of travellers to India. In order to attract intending travellers as well as past travellers (for repeat visit) - a comprehensive plan with lots of stimulus is essential. Maps, guidebooks and brochures needs to be present in Russian. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website. Promotional campaigns in local language should address the information gaps that are currently present so as to increase travellers interest in India and also to remove unfounded fears regarding travelling to India.

7.2 Way Forward – Long Term & Short Term Measures

Short Term Measures:

- Incredible India advertisements in local language on TV and popular social media
- India tourism brochures, maps and guidebooks in the local language
- Inclusion of staff of the India Tourism Office in Russia who can be contacted by travellers and trade for any queries and enquiries
- Feature Incredible India advertisements on social media
- Organize India nights and food festivals regularly so as to pique interest of Russian travellers about India
- Training and providing certified Russian speaking guides in various cities of India
- Impart training to front office executives who are in direct contact with prospective travellers so as they can handle all types of queries
- No publicity material is there, there is no mention about New India – new destinations, new products, new packages, new circuits and new luxury properties need to be promoted alongside well known destinations, so as to offer a large choice in front of prospective travellers.
- Frequent interaction with tour operators – to remain connected.

Long Term Measures:

- More focus on product /destination campaigns required for different set of travellers. Products for specific countries should be designed based on the needs and requirements of travellers from that specific geography.
- Rather than sending brochures etc., fortnight updates though e-newsletters on what is happening NEW in India –event, launch, festival etc.
- Design advertisements with celebrities of the target country to lend trust and credibility to the promotional advertisement.

Annexure - Questionnaires Used

PAST TRAVELLER SURVEY

1. GENDER OF THE RESPONDENT: (Do NOT ask; Code only) **Male :1** **Female : 2**

2. Name of the Respondent

3. Please let us know something about yourself

Age group you belong to	**Below 18 yrs**	**1**	**18 – 25 yrs**	**2**
	26 – 35 yrs	**3**	**36 - 50 yrs**	**4**
	51 – 60 yrs	**5**	**Above 61 yrs**	**6**

IF CODED 1, THEN PROCEED ELSE TERMINATE THE INTERVIEW

4. Did you travel outside your country in the past two years?

Yes	**1**	**No**	**2**

IF CODED YES, THEN PROCEED ELSE TERMINATE THE INTERVIEW

5. Are you a NRI / PIO?

Yes	**1**	**No**	**2**

IF CODED NO, THEN PROCEED ELSE TERMINATE THE INTERVIEW

6. Are you a National of the country?

Yes	**1**	**No**	**2**

IF CODED YES, THEN PROCEED ELSE TERMINATE THE INTERVIEW

7. How frequently do you make trips abroad?

Once a year	1	This is my First holiday	4
Twice a year	2	Once in 4-5 years	5
Once in two years	3	Never	6

8. What is your average budget for abroad trip in USD? ____________________________
9. What are your preferred destinations?

10. What kind of holidays do you usually go for?

Family leisure trips	1	Leisure trips with my spouse or partner	4
Family adventure holidays	2	Family shopping trips	5

Business trips	3	Travel alone	6

11. Did you visit India in the past three years?

Yes	1	No	2

(IF CODED 'YES' THEN ASK QUESTION 11, - PART A ELSE GO TO PART –B)

PART – A - Travelers Who Visited INDIA in Last One Year

12. What was the reason for your travel plan to India?

Reasons	
Business	01
Holiday, Leisure	02
Social- visiting family & friends, relatives, attending marriages etc	03
Health & Medical	04
Pilgrimage /Religious Activity	05
Education/Research/Training	06
Shopping	07
Others	08

13. a.) What was the reason for you to choose India as a travel destination? (MA)

Culture	1	Scenic Tourist Spots	9
Heritage	2	Yoga, Spiritualism and Meditation	10
Hill Stations and Mountains	3	Theme Parks	11
Religious Places	4	Wildlife /Adventure Sports	12
Medical Tourism	5	Fairs & Festivals	13
Variety of food on offer	6	MICE	14
Beaches	7	Shopping	15
To meet friends and relatives	8	Official	16

b) If Purpose was Medical Tourism,
Which State of India did you visit for the purpose? ______________________________
Which Hospital/ Medical Institution did you visit? __________________________________
What has been your experience?

Fully Satisfied ☐ Partially Satisfied ☐ Not Satisfied ☐

14. Which all places or destinations of India, amongst these did you visit and how did you get to know about these destinations?

Destination	**Visited Y/N**	**Source of information about the city**
Mumbai		
Delhi		
Kerala		
Kolkata		
Bangalore		
Chennai		
Agra		
Jaipur		
Varanasi		
Hyderabad		
Gaya		

Goa		
Other (Pls Specify)		

15. What were the sources of information about India before you planed your trip? Please provide specific names for the selected source of information

TV - **Serial**____________________ - **Advertisement**____________ __________________________ __________________________ - **Channel**________________ - **Documentary**_____________ __________________________	1 a) b) c) d)	Friends / Relatives Newspaper______________________________ Consumer Fairs & Exhibitions	7 8 9
Posters/Billboards/Movies_________ __________________________________ __________________________________	2	Previous Visit	10
Magazines/Books________________ __________________________________	3	It is the country where I have my roots	11
Customer Information Services	4	Any other________________________________	12
Trade Events	5		
Websites/Internet________________ __________________________________ __________________________________	6		

16. Are you aware of India Tourism Office in your country?

Yes	1	No	2

17. **Are you aware of the publicity measures taken by India Tourism Offices in your country?**

Yes	**1**	**No**	**2**
If Yes, sources			
Road Show	**a)**		
Fair	**b)**		
Seminar/Workshops	**c)**		
TV Advertisements	**d)**		
Print Advertisements	**e)**		

18. What is your opinion regarding the publicity campaigns undertaken by the Tourism Office of India in your country?

    ____

19. Did it in any way influence your decision to visit India?

    ____

20. Do you think Indian Tourism office provides adequate information about India?

Yes	1	No	2

21. Please answer

Which month did you travel?	**What was your approximate duration of stay?**

22. What sort of accommodation did you use during your stay in India? If you stayed in multiple accommodation units, please mention the type of unit you stayed in majority of days (single response)

Accommodation	
Resorts	01
Star Category Hotels	02
Mid-Range Hotels	03
Budget Hotels	04

Staying with Friends / Family in their House	05
Others_______________________________________	06

23. What was the mode of travel within India, **Please choose the one which u used to travel maximum (in terms of distance). (PLS TICK)**

MODE	PLS TICK	LUXURY TRAIN		
AIR		PALACE ON WHEELS	GOLDEN CHARIOT	RAJDHANI
ROAD		DECCAN ODYSEEY	INDIAN MAHARAJA	SHATABDI
RAIL (If **YES ask LUXURY OR OTHERS)**		SPLENDOUR OF SOUTH		

24. How much of the total expenditure was spent on accommodation, travel & food ETC?

Expenditure Heads	Package (USD)	Expenditure Heads	Non Package (USD)	TOTAL
Accommodation		Accommodation		
International Travel		International Travel		
Local Travel		Local Travel		
Food including alcohol		Food including alcohol		
Others		Others		
TOTAL				

25. Which are the three most preferred modes to make payment when you travel abroad?

Payment Mode	Rank
Cash	
Cheque	
Online	
Credit Card	
Debit Card	

26. Would you like to re – visit India

Yes	1	No	2

27. a) If yes, will you please let us know why would you like to visit India again?

Museums	1	Scenic Tourist Spots	9
Monuments, Forts, Palaces	2	Yoga, Spiritualism and Meditation	10
Hill Stations and Mountains	3	Theme Parks	11
Religious Places	4	Wildlife /Adventure Sports	12
Medical Tourism	5	Fairs & Festivals	13
Variety of food on offer	6	MICE	14
Beaches	7	Shopping	15
To meet friends and relatives	8	Official	16

b) If No, what are the reasons?

Visa Issues	1	Safety & Security	3
Expensive	**2**	Other (Please specify)	4

28. Please mention your 5 BEST and 5 most UNPLEASANT EXPERIENCES during your India Visit

	BEST EXPERIENCES		UNPLEASANT EXPERIENCES
1		1	
2		2	
3		3	
4		4	
5		5	

29. What is your overall satisfaction in terms of INDIA AS A TOURIST DESTINATION?

Excellent	1	Poor	4
Good	2	Not satisfied at all	5
Satisfactory	3		

30. What was your mode of booking?

Self (internet)	1	Self (Counter)	2	Travel operator /Agent	3

31. IF CODED 01 OR 02 IN Q 30, THEN ADMINISTER THIS QUESTION. If you are planning it yourself, then where would you receive help from?

SOURCES	
Travel Portals	01
Books	02
Websites / Internet	03
Brochures on India	04
Indian tourism office in my own country	05
Friends / Relatives	06
Past Visits	07
Any Other …………………………………………………………………….	08

IF CODED 03 IN Q 31, THEN ADMINISTER QUESTIONS – 32 TO 34

32. What sort of tour operator / travel agent did you take help from?

KIND OF TOUR OPERATOR	
Multi Country tour operator	01
Tour operator that operates in my own country	02
Tour operator in India	03
Freelance travel agents	04
Any Other …………………………………………………………………….	05

33. Which are the three most important factors you had used for selection of a tour operator? Kindly Rank the three most important factors in the order of importance.

Tour Operator	**Rank**
Package Options	
Cost of Package	
Brand Name	
Presence of Tour Operator in Visiting Country	
Travel Insurance Facility	
Catering to my needs	
Better package deal	
Any Other____	

34. Could you please tell me during this trip what kind of travel arrangement did you use? (NOTE TO INV: READ OPTIONS. SINGLE RESPONSE ONLY)

Travel Arrangements	
Readymade package	01
Tailor made package	02
International Ticketing	03
Visa	04
MICE (Meeting, Incentives, Conventions, Exhibitions)	05
Cruise Services	06
Sight Seeing	07
Others____	08

35. What is the average monthly household expenditure?

(SINGLE CODING – INCOME TO BE CALCULATED IN TERMS OF US DOLLARS

Monthly Household Income	
Less than 1000	01
1,000 – 1,999	02
2,000 – 2,999	03
3,000 – 5,000	04
More than 5,000	05

36. Which of the following best describes your employment status?

		YES	NO	DK	Refused
A	Employed full-time	1	2	3	4
B	Employed part-time	1	2	3	4
C	A student / Researcher	1	2	3	4
D	A pensioner	1	2	3	4
E	Retired	1	2	3	4
F	A homemaker	1	2	3	4
G	Unemployed	1	2	3	4
H	Business	1	2	3	4
I	Other……………………………………..	1	2	3	4

PART –B - Travelers Who Visited Other Countries In Last One Year

1. Which country or countries did you visit in the last one year?

2. What was the reason for traveling abroad?

Reasons	Q 49
Leisure / Recreation	01
Business	02
Education/ Research	03
Visiting friends / relatives	04
Medical Aid / Hospitalization	05
MICE (Meeting, Incentives, Conventions, Exhibitions)	06
Religious	07
Heritage / Culture	08
Shopping	09
Any Other …………………………………………………………………….	10

3. What time of the year did you visit the above country or countries? Is it the prime season for visiting that country?

Country	Time of the year	Yes/ No	Duration

4. What were the sources of information about the destinations you VISITED?

TV	1	Friends / Relatives	7
Posters / Billboards / Movies	2	Newspaper	8
Magazines / Books	3	Consumer Fairs & Exhibitions	9
Customer Information Services	4	Previous Visit	10
Trade Events	5	It is the country where I have my roots	11
Websites / Internet	6	Any other_____________________________	12

5. How was your trip?

Excellent	1	Good	2
Satisfactory	3	Poor	4
Very Poor	5	Not aware	5

6. What was your expenditure?

Less than 10,000 USD	1	10,000 – 20,000 USD	2
20,000 – 40,000 USD	3	Above 40,000 USD	4

7. Was it value for money?

Yes	1	No	2

8. What sort of accommodation did you use during your stay abroad? If you stayed in multiple accommodation units, please mention the type of unit you stayed in majority of days (single response)

Accommodation	**Q 56**
Resorts	01
Star Category Hotels	02
Mid-Range Hotels	03
Budget Hotels	04
Staying with Friends / Family in their House	05
Others_______________________________________	06

9. How much of the total expenditure was spent on accommodation, travel & food ETC?

Expenditure Heads	**Package (USD)**	**Expenditure Heads**	**Non Package (USD)**	**TOTAL**
Accommodation		Accommodation		
International Travel		International Travel		
Local Travel		Local Travel		
Food including alcohol		Food including alcohol		
Others		Others		
TOTAL				

10. Which are the three most preferred modes to make payment when you travel abroad?

Payment Mode	**Rank**
Cash	
Cheque	
Online	
Credit Card	
Debit Card	

11. What was your mode of booking?

Self (internet)	1	Self (Counter)	2	Travel operator /Agent	3

12. IF CODED 01 or 02 IN Q 54, THEN ADMINISTER THIS QUESTION. If you would plan it yourself, then from which all sources you will receive help from?

SOURCES	**Q 60**
Travel Portals	01
Books	02
Websites / Internet	03
Brochures on India	04
Friends / Relatives	05
Past Visits	06
Any Other ……………………………………………………………………….	07

13. Had you opted for travel insurance while planning your trip to the countries mentioned above?

Yes	1	No	2

14. IF CODED 1 IN Q 64, THEN ASK: What are the reasons for opting for Travel Insurance? **MULTIPLE CODING**

Regular Precaution	1	Part of Tour Package	3
Country to be visited is unsafe	2	Any Other ………………………………………	4

IF CODED 02 IN Q 54. THEN ADMINISTER QUESTIONS – 58 TO 61.

15. What sort of tour operator / travel agent you had taken help from?

KIND OF TOUR OPERATOR	**Q 66**
Multi Country tour operator	01
Tour operator that operates in my own country	02
Freelance travel agents	03
Any Other ……………………………………………………………………….	04

16. Which are the three most important factors you had used for selection of a tour operator? Kindly Rank the three most important factors in the order of importance.

Tour Operator		**Rank**
Package Options	01	

Cost of Package	02	
Brand Name	03	
Presence of Tour Operator in Visiting Country	04	
Travel Insurance Facility	05	
Catering to my needs	06	
Better package deal	07	
Any Other____	08	

17. Could you please tell me during this trip what kind of travel arrangement you had used?

(NOTE TO INV: READ OPTIONS. SINGLE RESPONSE ONLY)Travel Arrangements	
Readymade package	01
Tailor made package	02
International Ticketing	03
Visa	04
MICE (Meeting, Incentives, Conventions, Exhibitions)	05
Cruise Services	06
Sight Seeing	07
Others____	08

18. How many months before traveling you had contacted the travel operator?

Months	**Q 69**
Less than 1 month	01
1 – 2 months	02
2 – 4 months	03
4 – 6 months	04
More than 6 months	05

19. Were you aware of India as a tourist destination when you planned for this trip?

Yes	1	No	2

20. Would you like to visit India the next time you plan a trip abroad?

Yes	1	No	2

21. IF CODED 01 IN Q20, PROCEED, else go to q.22 Will you please let us know why would you like to visit India?

Museums	1	Scenic Tourist Spots	9
Monuments, Forts, Palaces	2	Yoga, Spiritualism and Meditation	10
Hill Stations and Mountains	3	Theme Parks	11
Religious Places	4	Wildlife /Adventure Sports	12
Medical Tourism	5	Fairs & Festivals	13
Variety of food on offer	6	MICE	14
Beaches	7	Shopping	15
To meet friends and relatives	8	Official	16

22. If you ever decide to visit India, would you plan your trip yourself or through a travel operator?

Self	1	Travel operator	2

23. IF CODED 2 IN Q 22, THEN ASK: What is the reason behind going through an intermediary?

IF CODED 02 IN Q 22, THEN ADMINISTER QUESTION – 24

24. What is the reason behind this decision?

Reasons for not intending to travel to India	**Q 77**
Security Concerns	01
I do not like to be surrounded by too many people	02

India is a comparatively expensive option	03
Lack of good facilities in India in terms of Hotels, food, transport etc.	04
Will not have enough time to travel to all the places in India	05
Lack of knowledge about India	06
Any Other…………………………………………………………..	07

25. Would you like to visit India ever?

Yes	1	No	2

THANK RESPONDENT

INTENDING TRAVELLER SURVEY

(Respondent who has <u>not travelled in last one year BUT INTENDING TO TRAVEL</u>)

GENDER OF THE RESPONDENT: **<u>(Do NOT ask; Code only)</u>** Male:1 Female :2

1. Name of the Respondent

2. Please let us know something about yourself

Are you?	An inhabitant of the country	01	An immigrant settled in the country	04
	PIO	02	An NRI	05
	Tourist	03	Others__________________	06

If Code is 2,3& 5 , Then Thank & Terminate

Age group you belong to	Below 18 yrs	1	18 – 25 yrs	2
	26 – 35 yrs	3	36 - 50 yrs	4
	51 – 60 yrs	5	Above 61 yrs	

3. **DO YOU INTEND to travel abroad in next 12 months?**

Yes	1	No	2

IF CODED YES, THEN PROCEED ELSE TERMINATE THE INTERVIEW

4. Address :____
____

5. Telephone /Mobile number :______________________________

6. What kind of holidays do you usually go for?

Family leisure trips	1	Leisure trips with my spouse or partner	4
Family adventure holidays	2	Family shopping trips	5
Business cum Leisure trips	3	Travel alone	6

7. What shall be/ is your mode of booking?

Self (internet)	1	Self (Counter)	2	Travel operator /Agent	3

8. IF CODED 01 OR 02 IN Q 7, THEN ADMINISTER THIS QUESTION. Where will you approach?

SOURCES	
Travel Portals	01
Books	02
Websites / Internet	03
Brochures on India	04
Indian tourism office in my own country	05
Friends / Relatives	06
Past Visits	07

Any Other ……………………………………………………………………………	08

IF CODED 03 IN Q 7, THEN ADMINISTER QUESTIONS – 9 TO 12

9. What sort of tour operator / travel agent will you take help from?

KIND OF TOUR OPERATOR	
Multi Country tour operator	01
Tour operator that operates in my own country	02
Tour operator in India	03
Freelance travel agents	04
Any Other ……………………………………………………………………………	05

10. Which shall be the three most important factors you shall use for selection of a tour operator? Kindly Rank the three most important factors in the order of importance.

Tour Operator	Rank (1 to 3)
Package Options	
Cost of Package	
Brand Name	
Presence of Tour Operator in Visiting Country	
Travel Insurance Facility	
Catering to my needs	
Better package deal	
Any Other____	

11. How many tour operators would you contact for planning this trip?

One	1	Four	4
Two	2	Five	5
Three	3	More than five	6

12. How many months in advance do you intend to contact the travel operator?

Months	Q33
Less than 1 month	01
1 – 2 months	02
2 – 4 months	03
4 – 6 months	04
More than 6 months	05

13. Which are the three most preferred modes to make payment when you travel abroad?

Payment Mode	Rank (1 to 3)
Cash	
Cheque	
Online	
Credit Card	
Debit Card	

14. What sort of accommodation would you be using during your stay?

Accommodation	Q34
Resorts	01
Star Category Hotels	02
Mid-Range Hotels	03
Budget Hotels	04
Staying with Friends / Family in their House	05
Others____	06

15. How much of the total planned expenditure would you be willing to spend on accommodation, travel & ticketing?

Expenditure Heads	Package (USD)	Expenditure Heads	Non Package (USD)	TOTAL
Accommodation		Accommodation		
International Travel		International Travel		
Local Travel		Local Travel		
Food including alcohol		Food including alcohol		
Others		Others		

TOTAL				

16. Would you opt for travel insurance while planning your trip.?

Yes	1	No	2

PLEASE ADMINISTER Q 17 IF CODED 1 IN Q 16

17. What was the reason for opting for Travel Insurance?

Regular Precaution	1	Part of Tour Package	3
Country to be visited is unsafe	2	Any Other ………………………………………	4

18. Do you intend to visit **INDIA next 12 months?**

Yes	1	No	2

(IF CODED 'YES' THEN ASK QUESTION 19, - PART A ELSE GO TO PART –B)

PART – A - Travelers Who INTEND TO VISIT INDIA

19. What is the reason for you to choose India as a travel destination? (MA)

Culture	1	Scenic Tourist Spots	9
Heritage	2	Yoga, Spiritualism and Meditation	10
Hill Stations and Mountains	3	Theme Parks	11
Religious Places	4	Wildlife /Adventure Sports	12
Medical Tourism	5	Fairs & Festivals	13
Variety of food on offer	6	MICE	14
Beaches	7	Shopping	15
To meet friends and relatives	8	Official	16

20. Do you specifically want to visit India or plan it as a part of a regional tour (South Asia)?

Visit India	1	Part of Regional Trip	2

21. If CODED 2 IN q 20, then which other COUNTRIES do you want to visit along with India?

	1		3
	2		4

22. Which all places or destinations of India are you aware of & planning to visit?
Source of information (Websites/Tour Operators/India Tourism Office/Travel Publications/ Others

Destination	AWARE	PLANNING TO VISIT
	Y/N	Y/N
Mumbai		
Delhi		
Kerala		
Kolkata		
Bangalore		
Chennai		
Agra		
Jaipur		
Varanasi		
Hyderabad		
Gaya		
Goa		
Others (Pls specify)		

23. What are the sources of information about India before you plan your trip? Please mention specific names of sources

TV - Serial________________ - Advertisement__________ - Hollywood Movies ________________ - Travel Channel - Geography Channel - Documentary__________	1 a) b) c) d)	FM Radio	7
		Digital (Face book / You tube)	8
		Fairs & Festivals (India Stall)	9
Posters/Billboards_____________ ____________________________	2	Previous Visit	10
Magazines/Books______________ ____________________________	3	Give aways (Festivals)	11
Bus wraps / Taxi Wraps	4	Friends / Relatives	12
Incredible India Road shows	5	It is the country where I have my roots	13
Websites/Internet______________	6	Any other___________________________	14

24. Which time exactly do you plan to visit India? Month________ Year___________
25. What SHALL BE the approximate duration of your stay? _____________days

26. Are you aware of Indian Tourism Office in your country?

Yes	1	No	2

27. IF CODED 1 IN Q 26, THEN ASK: Have you approached them?

Yes	1	No	2

28. IF CODED 1 IN Q 27, THEN ASK: Does the Indian tourism office in your country provide any help at all?

Yes	1	No	2

29. How would you rate the role of Indian Tourism Offices in your country in promoting India as a tourist destination?

Excellent	1	Good	4
Satisfactory	2	Poor	5
Very Poor	3	Not aware	6

30. In case you opt for a tour operator, what is the reason behind going through an intermediary?

Reasons	Code
Less information available about India	01
No Credible source of Information	02
Don't have time	03
More comfortable with tour operator	04
Others______________________	05

PART –B

Travelers Who Are Intending To Visit Other Countries In Next One Year

31. Which country or countries do you plan to visit in the next one year?

32. What would be the reason for traveling abroad?

Reasons	Q 40
Leisure / Recreation	01
Business	02
Education/ Research	03
Visiting friends / relatives	04

Medical Aid / Hospitalization	05
MICE (Meeting, Incentives, Conventions, Exhibitions)	06
Religious	07
Heritage / Culture	08
Shopping	09
Any Other ……………………………………………………………………….	10

33. What time of the year do you plan to visit the above country or countries? Is it the prime season for visiting that country & what shall be the duration?

Country	Time of the year	Yes / No	Duration

34. What are the sources of information about these destinations you want to visit?

Hollywood movies	1	Friends / Relatives	7
Posters / Billboards	2	FM Radio	8
Magazines / Books	3	Consumer Fairs & Exhibitions	9
Digital (Face book / U tube)	4	Previous Visit	10
TV – Travel channel/Geography channel	5	It is the country where I have my roots	11
Websites / Internet	6	Any other______________________________	12

35. Were you aware of India as a tourist destination when you planned for this trip?

Yes	1	No	2

36. Would you like to visit India the next time you plan a trip abroad?

Yes	1	No	2

37. IF CODED 01 IN Q36, Will you please let us know why would you like to visit India?

Museums	1	Yoga, Spiritualism and Meditation	9
Monuments, Forts, Palaces	2	Theme Parks	10
Hill Stations and Mountains	3	Wildlife /Adventure Sports	11
Religious Places	4	Fairs & Festivals	12
Medical Tourism	5	MICE	13
Cuisines	6	Shopping	14
Beaches	7	Official	15

38. If you ever decide to visit India, would you plan your trip yourself or through a travel operator?

Self	1	Travel operator	2

39. IF CODED 2 IN Q 38, THEN ASK: What is the reason behind going through an intermediary?

IF CODED 02 IN Q 36, THEN ADMINISTER QUESTIONS – 40

40. What is the reason behind this decision?

Reasons for not intending to travel to India	**Q68**
Security Concerns	01
I do not like to be surrounded by too many people	02
India is a comparatively expensive option	03
Lack of good facilities in India in terms of Hotels, food, transport etc.	04
Will not have enough time to travel to all the places in India	05
Lack of knowledge about India	06
Any Other………………………………………………………..	07

41. Would you like to visit India ever?

Yes	1	No	2

42. Which of the following best describes your employment status?

		YES	NO	DK	Refused
A	Employed full-time	1	2	3	4
B	Employed part-time	1	2	3	4
C	A student / Researcher	1	2	3	4
D	A pensioner	1	2	3	4
E	Retired	1	2	3	4
F	A homemaker	1	2	3	4
G	Unemployed	1	2	3	4
H	Business	1	2	3	4
I	Other………………………………	1	2	3	4

43. What is your educational qualification?

Qualification	Code	Qualification	Code
No formal education	01	Graduate & above	05
Primary	02	Technical / Professional	06
Secondary	03	Any Other	07
Higher Secondary	04		

44. What is the average monthly household expenditure?
(SINGLE CODING – INCOME TO BE CALCULATED IN TERMS OF LOCAL CURRENCY)

Monthly Household Expenditure	Q9
Less than 1,000	01
1000 – 1999	02
2000 – 2999	03
3000 – 5000	04
More than 5000	05

THANK RESPONDENT

TOUR /TRAVEL OPERATOR

1. Company or organization's name
2. Name
3. Position of responsibility that you hold in this company
4. Email address and phone number

Collect visiting card

5. Countries where you offer travel or tourism services.

6. Services you offer
   International ticketing, visa, Customized packages, Tour packages, MICE, Cruise etc.

7. For analysis purposes we would like to know the size of your operations. How many international travelers did you handle in the last 12 months?

Less than 100	1
100 to 250	2
251 to 500	3
501 to 1000	4
1001 and above	5
DK	6
Refused	7

8. Preferred international destinations for outbound travelers from your country? Please include even those destinations that you do not deal with and also mention the reasons for preferring them

9. Please tell me if the following holiday activities are popular among international travelers from your country.

		YES	NO	DK	REFUSED
A	Adventure sports	1	2	3	4
B	Eco-tourism	1	2	3	4
C	Shopping	1	2	3	4
D	Sightseeing	1	2	3	4
E	Religious purpose or pilgrimage	1	2	3	4
F	Visiting friends and relatives	1	2	3	4
G	Medical treatment	1	2	3	4
H	Cultural Events	1	2	3	4
I	MICE	1	2	3	4
J	Business	1	2	3	4
K	Leisure	1	2	3	4
L	Some other vacation activity	1	2	3	4
	a)________________________________				
	b)________________________________				

10. Please give us averages estimate of how much in advance do the travelers contact you for traveling plans & how much in advance do they start the booking process?
11. What is the app. Conversion rate? ____________________

12. Where do the travelers who come to you for information or booking for international destinations, get their primary information regarding the destination?

TV	1	Friends / Relatives	7
Posters / Billboards / Movies	2	Newspaper	8
Magazines / Books	3	Consumer Fairs & Exhibitions	9
Customer Information Services	4	Previous Visit	10
Trade Events	5	It is the country where I have my roots	11
Websites / Internet	6	Any other______________________________	12

13. What types of vacations do the international travelers who contact you, opt for?
14. What is usually the employment status of the international travelers from your country?
15. What is the average age group of the international travelers from your country?
16. What is usually the marital status of the international travelers from your country?
17. What kind of services do the international travelers of your country usually opt for?
18. What is the budget of packages that is popular among international travelers from your country? Please mention average duration of stay of international travelers from your country too.
19. Which are the destinations that you think are going to be most preferred among international travelers in the next few years? What are the reasons for these destinations being preferred? Please distribute in terms of percentage of the travelers that these destinations will attract?

Serial No.	**Country Name**	**Reasons**	**Percentage**

20. What has been the increase in expenditure of travelers for International visits in percentage terms for the following years?

Year	***%***	***Year***	***%***
2011 - 2012		*2013 - 2014*	
2012 - 2013		*2014 - 2015*	

INDIA SPECIFIC QUESTIONS

21. Did you hear about India?

Yes	*1*	*No*	*2*

(If yes, then administer Q 22 onwards)

22. Where did you hear about India from?

TV	*1*	*Friends / Relatives*	*7*
Posters / Billboards / Movies	*2*	*Newspaper*	*8*
Magazines / Books	*3*	*Consumer Fairs & Exhibitions*	*9*
Customer Information Services	*4*	*Previous Visit*	*10*
Trade Events	*5*	*It is the country where I have my roots*	*11*

Websites / Internet	*6*	*Any other____________________________*	*12*

23. Do you have packages for intending visitors to India?

Yes	*1*	*No*	*2*

(If No, ask Q 24 and Q25 and then shift Indian Tourism Office Section. If yes, ask Q 26 onwards)

24. You mentioned that you do not deal with India as a tourist destination. Why do you not deal with India?
25. In the future, would you be interested in dealing with India as a tourist destination?
26. As per your estimates, which are the prime locations & time for visit of the tourists from your country to different locations of India (Pls. indicate the location and tick the period and the reasons behind the same)

Name of the Location	*Period*	*Reason*

27. How would you rate the facilities available in India against the other prime destinations in Asia? (Rate on a scale of 1 to 5 wherein 1- Very Poor, 2- Poor, 3 – Average, 4 – Good, 5 – Very Good).

Road Infrastructure		Modes of available conveyance	
Airport Infrastructure		Recreation /Entertainment Amenities	
Accommodation Infrastructure		Food	
Hospitality Services		Beverages	
Connectivity modes		Handicrafts & Artefacts	
Accessibility to tourist locations		Friendliness of People	
Quality of Guides		Degree of knowledge of foreign language from the service personnel	
Shopping opportunities		Foreign Exchange facility	
Convenience for payment transactions		Safety	

28. How would you rate the role of India Tourism Offices in your country in promoting India as a tourist destination in this country?

Excellent	*1*	*Good*	*2*
Satisfactory	*3*	*Poor*	*4*
Very Poor	*5*		

29. Do you see an increase in the number of travelers interested in visiting India from the past few years? If Yes , what according to you are the reasons ?

Yes	*1*	*No*	*2*

30. What has been the increase in interest of travelers in visiting India, in percentage terms, for the following years?

Year	*%*	*Year*	*%*
2011 – 2012		*2012 - 2013*	
2013 - 2014		*2014 - 2015*	

31. Do you have any specific agents in India?

Yes	*1*	*No*	*2*

32. By what percentage do you expect India to be a source of growth for your company in the next 3 years? (mark only one)

0% to 10%		*Under -30%*	
11% to 20%		*-29% to -20%*	
21% to 30%		*-19% to -10%*	
Over 30%		*-9% to 0%*	

33. How many travelers did you send to India in the last 3 years and what was the average length of stay, group size and the average price of package?

Year	*No. of travelers*	*Average length of stay*	*Average price of package (USD)*	*Average group size*
2013				
2014				
2015				

34. What destinations do you consider to be the main competitors of India?

35. Please identify any weaknesses you may have observed in India as a tourism destination?
36. What actions would you like to see the Ministry of Tourism, Government of India to take to strengthen its position in the market?
37. Has the interest level in India as a tourist destination remained the same, decreased, or increased in the past two years?

Decreased	1
Remained the same	2
Increased	3

38. What is the income profile of travelers who vacation in India? From

An upper income group	1
A middle income group, OR	2
A lower income group	3

39. What is the age profile of travelers who holiday in India?
40. What aspects of India attract visitors to India?
41. In your opinion, is there sufficient information available in your country about India as a tourist destination for the potential holiday traveler to India?

Yes	1
No	2

42. You mentioned that there is not enough tourist information available to the potential India traveler. What types of information are lacking in your country?
43. What are the key challenges that you face in marketing India as a tourist destination?
44. In your opinion, which are the most popular or sought-after tourist attractions in India? (Open ended and code) (Multiple coding possible)

Taj Mahal, Agra	
Palaces, Jaipur	
Qutab Minar, Delhi / New Delhi	
Backwaters in Kerala	
Lal Quila, Delhi / New Delhi	
Leh-Ladakh	
Hill stations, Manali / Kullu etc	
Places of religious interests, Haridwar / Rishikesh	
Buddhist sites	
Rural life and culture	
Others	

45. Among your past customers who have travelled to India, in your opinion the experience of past travellers to India fell short of their expectations OR exceeded their expectations?

Indian Tourism Office Related questions

46. Have you interacted with or received support from India tourism offices or tourism offices of other Asian destinations or any of their local counterparts?

	INTERACTED	HELPFUL
YES	1	1
NO	2	2
DK	3	3
REFUSED	4	4

47. What efforts would be required on the part of India tourism offices and their local counterparts to make you seriously consider marketing and dealing with India as a tourist destination? How about (read and rotate A-I, then J)?

		YES	NO	DK	REFUSED
A	Offering more support in terms of promotional material and campaigns	1	2	3	4
B	Designing of new destination routes	1	2	3	4
C	Helping in visa and passport related issues	1	2	3	4
D	Increasing new product offerings	1	2	3	4
E	Increasing marketing support	1	2	3	4
F	Increasing communication to potential travelers	1	2	3	4
G	Holding symposiums and seminars for trade partners	1	2	3	4
H	Holding consumer exhibitions	1	2	3	4
I	Facilitating interaction and support from India-based trade partners	1	2	3	4
J	Any other efforts	1	2	3	4
	a)________________________________ _______				

48. How active do you think is the Indian tourism offices in your country in promoting India as a travel destination?

Definitely active	1
Probably active	2
Probably not active, OR	3
Definitely not active	4

49. Do you think that the marketing and promotional activities of the Indian tourism offices sufficient? Please cite reasons for your answer

		Reason
YES	1	
NO	2	
DK	3	

REFUSED	4	

50. What is your suggestion to Indian tourism office to promote Indian tourism in your country? **(open ended)**

51. How do you expect outbound travel to grow in the future year in your country?

Year	***%***	***Year***	***%***
2015 - 2016		*2016 - 2017*	
2017 - 2018		*2018 - 2019*	

52. How do you expect outbound travel to grow to India in future?

Year	***%***	***Year***	***%***
2015 - 2016		*2016 - 2017*	
2017 - 2018		*2018 - 2019*	

53. Any last words or suggestions regarding Indian tourism? **(open ended)**

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THANK AND TERMINATE!