

Study on Tourism in Overseas Market of South Korea

Final Report – South Korea

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 South Korea to India is moderate (1,06,870 FTAs from South Korea to India in 2014) owing to the religious relationship of Buddhism between the two countries, a vast opportunity lies untapped in the form of outbound travellers in the South Korea 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 & 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 past and prospective outbound tourists, travel houses, Indian tourism office in Japan which looks after South Korea market too.

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 is the birthplace of Buddhism and South Korea has a lot of practising Buddhists, awareness among South Korea nationals about India and it tourist destinations is moderate.

E4. For holidaymakers from South Korea, India is a long haul destination. South Korea past travellers to India on a package tour has spent around INR 3.2 lakh per person on an average while past travellers to India on a non-package tour has spent around INR 3 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 magazines/ books on travel, but the promotional /publicity material available at various forums are not helping to plan their travel as their requirement of minute details are often not addressed. India as a destination is known to the travellers in South Korea due to the religious connect it shares, but, 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 more to lure the intending travellers to “Visit India “rather than simply describing India.

E6. The ethnic uniqueness that exists in South Korea also converts to choices and Travellers are only aware of Golden Triangle, therefore, 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. Thus there is need to focus separately for the 3 different stakeholders;

E7. 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 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'. There is a need for an integrated approach by India Tourism Office and tour operators. India Tourism Office must participate in important fairs and festivals where they can sponsor any event which will finally send a message to "*Visit India"* and not just educate travellers about India. More regular communication with tour operators is required with regards to events that can be organized to boost tourism to India. Since there is not India Tourism Office in South Korea, the trade does not know who to approach in case of any requirements and also in cases when face to face communication is required, trade cannot go to Tokyo to India Tourism Office there. It is required to appoint a person in South Korea, who can be approached by trade in case of any requirements.

E8. 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 currently shown in channels that are international and the same for the entire Korean country. Local channels in South Korea, which are most watched by the potential travellers are not showing India Tourism advertisements. The same is happening in case of print advertisements too. 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 celebrities and famous personalities to promote the pleasant experiences that they had encountered during their stay in India. Regular positive information about India needs to be circulated in the media so as to keep India in the minds of the travellers.

E9. 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 travel guide or plan with lots of stimulus is essential. Thus it is imperative to categorise the travellers from any particular country on the basis of their travel pattern and habit/ behaviour. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website. A promotional campaign addressing the safety and security concerns of India needs to be present in the mainstream media so that travellers' fears on the issue can be out to rest. Also information about India travel like distance, direct flights, flight duration etc. needs to be present in some campaigns about proximity of India.

E10. Way Forward – Long Term and Short Term Measures to promote Indian Tourism

Short Term Measures:

- Feature Incredible India advertisements in popular local channels and mainstream popular print media and more importantly on social media.
- A promotional campaign addressing proximity of India
- Promotional campaign addressing safety and security concerns in India that worry South Korean travellers
- A social media campaign of India Tourism highlighting the most liked aspects of tourism in the South Korean context.
- Regular flow of positive information about India in the popular mainstream media
- Organize focused Familiarization tours for media persons and tour operators.
- Impart training to front office executives who are in direct contact with prospective travellers so as they can handle all types of queries.
- Though enough publicity material is there, but it is all out-dated, 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

- Appointment of a permanent person in South Korea from India Tourism office who can be contacted by Trade in case of any requirements
- 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.

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

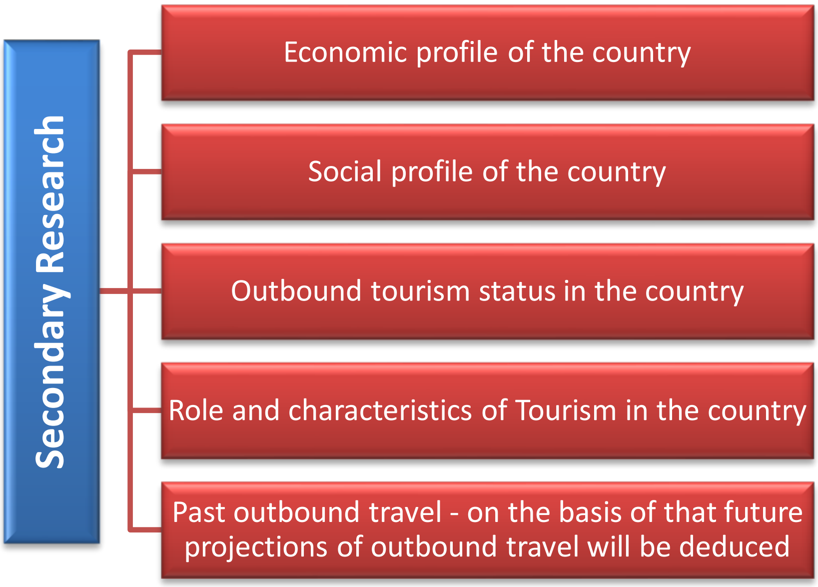
To conduct a study on tourism in the overseas markets of Germany, Japan, Russia, South Africa, South Korea and Turkey. The study will include a primary survey of past and prospective travellers besides compilation and analysis of information from secondary sources. Based on the secondary research and 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

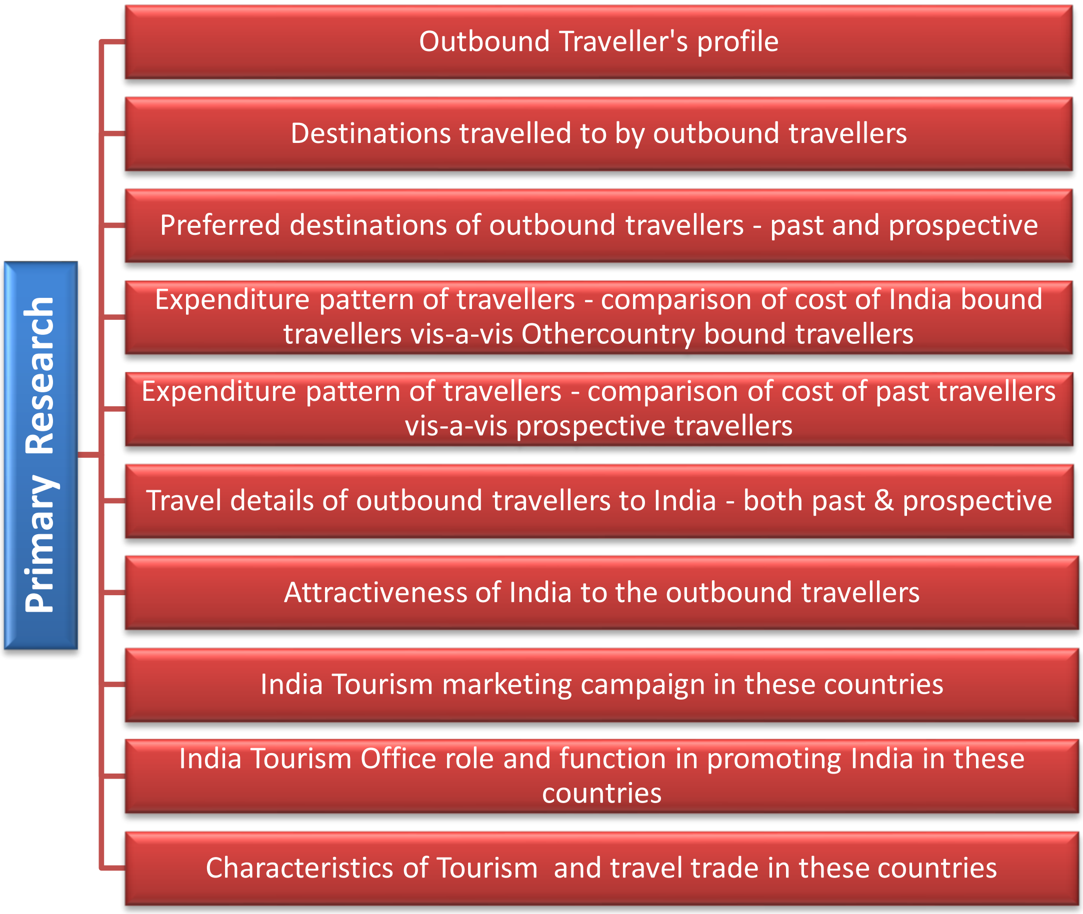
- Role and characteristics of tourism and travel trade in these countries
- Attractiveness of India for visitors from these countries
- India tourism marketing and promotion in these countries
- Suggestion of specific measures to promote India tourism in these countries. The role of India Tourism Offices 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 2500 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	
South Korea	900	900	200	500	2500

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 South Korea. Apart from the above mentioned samples.

1.5 Coverage

Segments

The following segments were covered by the study in South Korea:

- 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 staff handling the South Korea market

The country is rich in cultural heritage and wildlife, and hence, has numerous tourist attractions and destinations. The following major tourist locations in South Korea 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

South Korea 	Seoul	1500	1. Our Local office in Seoul 2. Local directory (2200) 3. Local tour operators (300)	Nielsen contacted 3100 respondents to achieve 2500 interviews
	Busan	1000		
	Total	**2500**		

Apart from interviewing tourists at these destinations, 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 South Korea / 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 Officer handling South Korea Market** – 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 – South Korea

2.1.1 Introduction

The name Korea is derived from the ancient Kingdom of Goguryeo, also known as Koryŏ. South Korea, officially known as the Republic of Korea, is a sovereign state in East Asia. South Korea occupies the southern portion of the Korean Peninsula, which extends some 1,100 km (680 mi) from the Asian mainland. This mountainous peninsula is flanked by the Yellow Sea to the west, and the Sea of Japan (East Sea) to the east. Its southern tip lies on the Korea Strait and the East China Sea.

An independent kingdom for much of its long history, Korea was occupied by Japan beginning in 1905 following the Russo-Japanese War. In 1910, Tokyo formally annexed the entire Peninsula. Korea regained its independence following Japan's surrender to the US in 1945. After World War II, a democratic-based government (Republic of Korea, ROK) was set up in the southern half of the Korean Peninsula while a communist-style government was installed in the north (Democratic People's Republic of Korea, DPRK). During the Korean War (1950-53), US troops and UN forces fought alongside ROK soldiers to defend South Korea from a DPRK invasion supported by China and the Soviet Union. A 1953 armistice split the Peninsula along a demilitarized zone at about the 38th parallel. PARK Chung-hee took over leadership of the country in a 1961 coup. During his regime, from 1961 to 1979, South Korea achieved rapid economic growth, with per capita income rising to roughly 17 times the level of North Korea. South Korea held its first free presidential election under a revised democratic constitution in 1987, with former ROK Army general ROH Tae-woo winning a close race. In 1993, KIM Young-sam (1993-98) became the first civilian president of South Korea's new democratic era.

Because of the peninsula's mountainous topography and isolationist policies of the last ruling dynasty, Korea retains a distinct cultural identity from its larger, historically imperialistic neighbours. This distinction can partly be attributed to the culture's Siberian origins, a heritage they share with many Turkic and Tungusic people, whether it be linguistic or cultural. Its location as a maritime hub played a role in acting as an intermediary of spreading advanced Chinese culture throughout ancient Northeast Asia, most notably to Japan, as such Chinese influences are evident in various parts of traditional Korean culture.

South Koreans lead a distinctive urban lifestyle; half of them live in high-rises concentrated in the Seoul Capital Area with 25 million residents and the world's sixth leading global city with the fourth largest economy. Three-quarters of South Korea is mountainous, making it a popular winter sport destination in Asia and hosting the 2018 Winter Olympics.

2.1.2 Social Profile

South Korea occupies the southern half of the Korean Peninsula, with North Korea to the north, China across the sea to the west and Japan a short ferry ride to the southeast. Despite initially being economically outdone by its northern rival, South Korea achieved rapid economic growth starting in the 1960s under the leadership of former military general President Park Chung Hee. As one of the East Asian Tigers, the South Korean economy's industrialization and modernization efforts gained traction in the 1980s and 1990s, with per capita income rising to 20 times the level of North Korea. In 1996, South Korea joined the OECD or "the rich nations club". Today, South Korea has been recognized as an industrialized, developed economy with some of the world's leading high technology corporations such as Samsung and LG.

The downsides of South Korea's economic growth, however, included heavy censorship, authoritarian governments (i.e, the 2nd Republic led by former military leader Park Chung-Hee, which would last from 1962 to Park's murder in 1979) and multiple human rights violations (illegal detentions, torture, straight-up murder, etc., like the infamous Gwangju Massacre from 1980) Demands for greater freedom of press and human rights fomented to nationwide demonstrations that led to democratic elections in 1987, just prior to the South Korean capital of Seoul hosting the 1988 Summer Olympic Games.

South Korea is now a liberal democracy and an economic powerhouse. In June 2000, a historic first summit took place between the South's President Kim Dae-jung and the North's late leader Kim Jong-il (leading Kim Dae-jung to be awarded the first Nobel Peace Prize for South Korea), but the peace process has moved at a glacial pace.

In recent years, a phenomenon known as the "Korean Wave" (or Hallyu) in which the popularity of South Korean film, television, music, food and other culture aspects has swept most of Asia and many other parts of the world has brought increased attention to the country. The country elected its first female president, Park Chung-Hee's daughter Park Geun-hye, in 2012.

South Korea is a very homogeneous country, with nearly all native residents identifying themselves as ethnically Korean and speaking the Korean language. The largest resident minority are the Chinese, numbering around 20,000-30,000. However, there is a number of foreign labourers from China, Mongolia, Bangladesh, Southeast Asia and other parts of world as well as English teachers from the United States, Canada, Australia, New Zealand, the United Kingdom, Ireland and South Africa. In addition, about 30,000 American military personnel are stationed throughout the country, especially near the DMZ. South Korea's large and growing economy has attracted people from all over the world and Seoul's status as a leading financial center has brought many financial workers from North America, Europe and Japan. Today, over one million foreigners reside in South Korea.

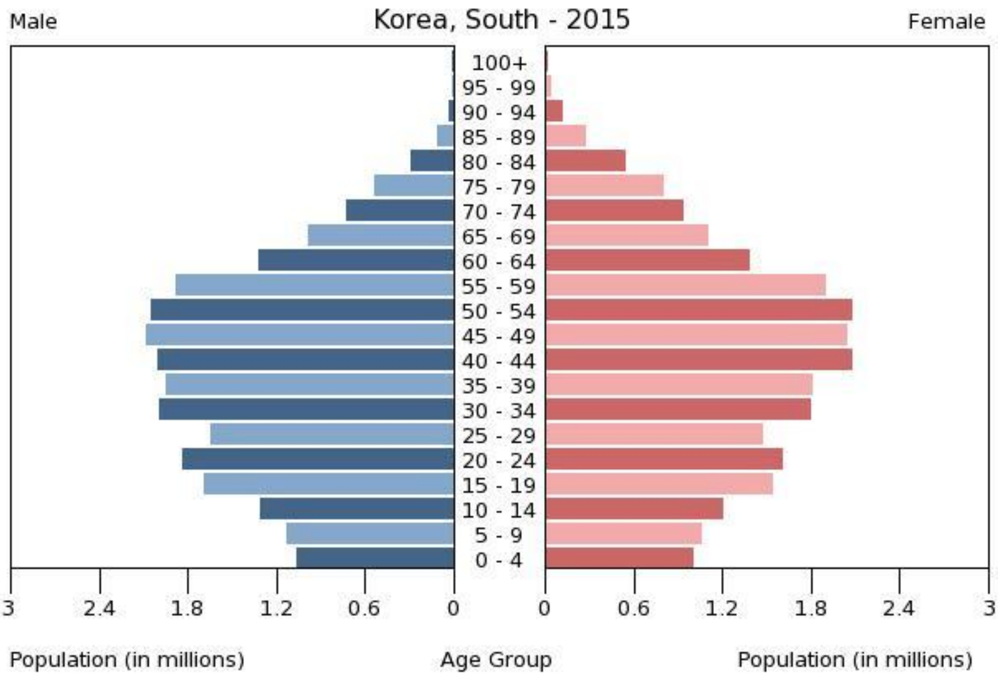
2.1.3 Urban/ Rural Population

South Korea is a majorly urbanized population with 82.5% of the total population (2015) living in urban areas. Major urban areas, with respect to population, are SEOUL (capital) with 9.774 million, Busan with 3.216 million, Incheon with 2.685 million, Daegu with 2.244 million, Daejon with 1.564 million and Gwangju with 1.536 million (2015). [1]

2.1.4 Gender Statistics

According to the Census 2011 data from Statistics South Korea, in 2015 (estimate) the country's population was 49,115,196 of which 24,548,244 were male 24,566,952 were female. The population distribution for South Korea by gender and age groups are given as follows.[2]

Figure 1: Population distribution for South Korea by gender and age groups



2.1.5 Prominent Religious Groups

As per a 2010 Survey, Christians form 31.6% (Protestant 24%, Roman Catholic 7.6%) of the total South Korean population. Buddhists constitute 24.2%, other or unknown constitute 0.9%, and people with no religion constitute 43.3% of the total South Korean population. [3]

2.1.6 Age Distribution

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

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

Table 4: Age Distribution of Population

S. No.	Age Group	Percentage of the Population	Male Population	Female Population
1	0-14 years	13.69%	3,489,464	3,232,372
2	15-24 years	13.52%	3,518,488	3,122,997
3	25-54 years	46.63%	11,687,846	11,214,687
4	55-64 years	13.14%	3,190,093	3,264,411
5	65 years and over	13.02%	2,662,353	3,732,485

2.1.7 Literacy

Literacy level in the country of South Korea is defined as people who can read and write above the age of 15. The total percentage of literates in South Korea is 97.9% of the total population. The literacy levels amongst male population are 99.2% and the literacy level amongst the female population is 96.6% of the total population.[4]

2.1.8 Economic Profile

South Korea is a developed country with a high-income economy and is the most industrialized member country of the OECD. South Korea's economy was one of the world's fastest-growing from the early 1960s to the late 1990s, and South Korea is still one of the fastest-growing developed countries in the 2000s, along with Hong Kong, Singapore, and Taiwan, the other three Asian Tigers. South Koreans refer to this growth as the Miracle on the Han River. The South Korean economy is heavily dependent on international trade, and in 2014, South Korea was the 5th largest exporter and 7th largest importer in the world.

South Korea hosted the fifth G20 summit in its capital city, Seoul, in November 2010. The two-day summit was expected to boost South Korea's economy by 31 trillion won, or 4% of South Korea's 2010 GDP, in economic effects, and create over 160,000 jobs in South Korea. It may also help improve the country's sovereign credit rating.

[4] Source: http://www.indexmundi.com/south_korea/literacy.html

The Asian financial crisis of 1997-98 exposed longstanding weaknesses in South Korea's development model, including high debt/equity ratios and massive short-term foreign borrowing. GDP plunged by 7% in 1998, and then recovered by 9% in 1999-2000. South Korea adopted numerous economic reforms following the crisis, including greater openness to foreign investment and imports. Growth moderated to about 4% annually between 2003 and 2007.

South Korea's export focused economy was hit hard by the 2008 global economic downturn, but quickly rebounded in subsequent years, reaching over 6% growth in 2010. The US-Korea Free Trade Agreement was ratified by both governments in 2011 and went into effect in March 2012. Between 2012 and 2015, the economy experienced slow growth – 2%-3% per year - due to sluggish domestic consumption and investment. The administration in 2015 faced the challenge of balancing heavy reliance on exports with developing domestic-oriented sectors, such as services.[5]

2.1.9 Gross Domestic Product (GDP)

South Korea's GDP in 2015 (estimate) was US$ 1.849 trillion. South Korea ranks 14th in terms of country ranking in the world for GDP. The GDP growth rate for South Korea (2015 estimate) is 2.7%. The PPP of South Korea stands at US$ 36,700 (2015 estimate).[6]

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

Year (est.)	USD
2015	US$ 1.849 trillion
2014	US$ 1.801 trillion
2013	US$ 1.744 trillion
Source: https://www.cia.gov	

[5] Source: CIA World Factbook & Wikipedia
[6] Source: CIA World Factbook

2.1.10 Per Capita Income/ Spending Power

South Korea ranks 46th in the world with regards to purchasing power parity. The rate of inflation in the year 2015 (estimate) was 0.7%.

Table 6: South Korea GDP (purchasing power parity)

Year (est.)	USD GDP Per capita (PPP)
2015	USD 36,700
2014	USD 35,700
2013	USD 34,600
Source: https://www.cia.gov	

2.2 Tourism Overview

2.2.1 General Statistics

South Korea is highly unique in terms of its culture and has a varied geography, climate, tourist activities and infrastructure. In 2012, 11.1 million foreign tourists visited South Korea, making it the 20th most visited country in the world, up from 8.5 million in 2010. Due to Hallyu, South Korea welcomed more than 12 million visitors in 2013 with 6 million tourists coming from China alone. With rising tourist prospects, especially from foreign countries outside of Asia, the South Korean government has set a target of attracting 20 million foreign tourists a year by 2017. The five leading origin markets in terms of the number of visitors to Korea were Japan (3.5 million), China (2.8 million), the United States, Chinese Taipei, and Thailand. Korean tourism contributed an estimated 5.9% of total national GDP in 2012 and accounted for 6.4% of total employment (WTTC). Tourism expenditure for the year was USD 16.5 billion, a 6.3% increase over the previous year, while tourism receipts amounted to USD 13.4 billion, an increase of 8.5%. Significantly, the balance of payment deficit decreased annually from USD 3.9 billion in 2010 to USD 3.0 billion in 2012.[7]

2.2.2 Inbound Travel

International tourists come primarily from nearby countries in Asia. Japan, China, Hong Kong and Taiwan together account for roughly 75% of the total number of international tourists. In addition, the Korean Wave has brought increasing numbers of tourists from Southeast Asia and India. The Korea Tourism Organization (KTO) is targeting 100,000 arrivals from India in 2013. International tourists typically enter the country through Incheon International Airport, near Seoul, which was found to be the world's best airport in 2006. Also international airports in Busan and Jeju are frequently used. The value for International tourism, number of arrivals in Korea was 12,176,000 as of 2013. Over the past 18 years this indicator reached a maximum value of 12,176,000 in 2013 and a minimum value of 3,684,000 in 1996.[8]

Table 7: Foreign Tourist Arrivals (in thousands)

Year	Foreign Tourist Arrivals (in thousands)[9]
2008	6,890,841
2009	7,817,533
2010	8,797,658
2011	9,794,796
2012	9,190,000
2013	12,175,550
2014	14,201,516
2015	13,231,651

[7] Source: http://www.southafrica.info/business/economy/sectors/tourism-overview & country profiles: tourism trends and policies – Korea (OECD 2014)

[8] Source: Organisation for Economic Co-operation and Development & "South Korea in hot pursuit of Indians"

[9] Source: "Visitor Arrivals" from Korea Tourism Organization

2.2.3 Seasonality of Tourism in the South Korea

Low seasons for travel by South Koreans are the months of February, March and November. Outbound travel from Korea peaks in summer months, representing close to 30% of outbound travel during the summer.

2.2.4 Outbound South Korea Travellers

1989 was a special year for Korean tourism industry because Korean government completely relaxed the travel restrictions for pleasure overseas travel in the same year. The number of Korean outbound tourists jumped up 67.3% 1989, exceeding one millions for the first time. The number continually increased over the years surpassing five millions in 2000 and ten millions in 2005. After 1995 the number of Korean outbound travellers has exceeded the number of inbound foreign travellers except for the 1998-1999 periods of Asian financial crisis.

Rising disposable incomes, gradual increases in vacation time, heightened globalization, and greater awareness of developments outside the Korean Peninsula are causing more Koreans to travel overseas. Korea's per capita GDP rose to almost USD 33,100 in 2013 (World Bank), placing it securely in the ranks of middle-income countries. Korean consumer confidence has also increased gradually, including a rise in discretionary spending for such activities as overseas travel for business and leisure.

The value for International tourism, number of departures in Korea was 14,846,000 as of 2013. Over the past 18 years this indicator reached a maximum value of 14,846,000 in 2013 and a minimum value of 3,067,000 in 1998.

Table 8: Departure (in thousands)

Year	Departures (in thousands)[10]
2008	11,996,000
2009	9,494,000
2010	12,488,000
2011	12,694,000

[10] Source: http://www.indexmundi.com/facts/korea/international-tourism & http://www.export.gov/southkorea/doingbusinessinskorea/leadingsectorsforusexportsinvestment/tourism/index.asp

2012	13,737,000
2013	14,846,000
2014	16,689,000
2015	17,400,000 (estimated)

2.2.5 Preferred Outbound Destinations

The number of South Korean travellers visiting locations outside of South Korea totalled 14.9 million travellers in 2013, which is nearly 1.4 percent of all global outbound travel. Preferred destinations for South Koreans are Japan, China, USA, Thailand and Australia. Most South Korean trips are to Asian destinations, which are cheap and easy to get to—important considerations for South Korean travellers. Thailand, the US and Australia are the top three destinations for long-haul South Korean travellers.

2.2.6 Domestic Tourism in South Korea

Number of Domestic trips is a good indicator of the domestic tourism status in a country. The said indicator of domestic tourism in South Korea is presented in the table below.

Table 9: Domestic Tourism Indicators (in thousands)

Year	Domestic Trips (in thousands)[11]
2008	267,009
2009	268,647
2010	263,633
2011	201,976
2012	244,102

2.3 Travel & Trade

2.3.1 Introduction

[11] Source: Source: Ministry of Culture, Sports and Tourism, Domestic Visitor Survey, 2008-12

With more than a million tourists visiting South Korea annually, mostly from China, Taiwan, Hong Kong and Japan, one has to wonder what really attracts such great numbers of visitors. For one, South Korea's transport system is one to reckon with. Highly efficient high speed buses and trains ensure that most parts of South Korea are easily accessible to all and sundry.

On the other hand, South Korea has a rich and diversified cultural history not to mention its scenic landscape. There are also major historic sites that dot the country, reminding the South Koreans of their joys, their pains and their heritage. Lastly, a great contributor to South Korea's GDP is the entertainment industry. Unknown to many, the world famous "Gangnam style" by South Korean rapper 'Psy' worked to attract multitudes of foreign visitors to South Korea. In addition, television dramas such as 'Winter Sonata' have gained much popularity among the Japanese working to create an influx of South Korean actors and singers all the while increasing the number of Japanese visitors to South Korea.

The fact that more Chinese tourists who would have otherwise visited Japan are opting for South Korea during the ongoing island disputes between China and Japan is perhaps a sign that not all is lost. In fact, it is approximated that 12,000 visitors are entering South Korean cruises from China. Most non-Korean tourists come from Japan, China, Taiwan and Hong Kong. The recent popularity of Korean popular culture, often known as the "Korean Wave", in these countries has increased tourist arrivals.[citation needed] Seoul is the principal tourist destination for visitors; popular tourist destinations outside of Seoul include Seorak-san national park, the historic city of Gyeongju and subtropical Jeju Island.[citation needed] Traveling to North Korea is not normally possible without a special permission, but in recent years organized group tours have allowed groups of South Korean citizens to visit Mount Kumgang.

South Korea's historical tourist attractions include the ancient capitals of Seoul, Gyeongju and Buyeo. Some natural landmarks include the peaks of the Baekdudaegan, particularly Seorak-san and Jiri-san, the caves of Danyang and Hwanseongul, and beaches such as Haeundae and Mallipo. Apart from Jeju island, there are many smaller islands. Excursion ferries are quite common along the south and west coasts and also to Ulleung-do Island, off the east coast. Limited tourism mainly by South Koreans to the Liancourt Rocks (Dokdo) has grown in recent years as a result of the political status of the rocks. Many local districts hold annual festivals, such as the Boryeong Mud Festival and the Cheongdo Bullfighting Festival.

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

The direct contribution of Travel & Tourism to GDP was KRW 30,046.7 bn (2.0% of total GDP) in 2014, and is forecast to rise by 3.5% in 2015, and to rise by 2.9% pa, from 2015-2025, to KRW 41,467.6 bn (2.2% of total GDP) in 2025. The total contribution of Travel & Tourism to GDP was KRW 85,944.9 bn (5.8% of GDP) in 2014, and is forecast to rise by 4.5% in 2015, and to rise by 2.5% pa to KRW 114,457.0 bn (6.0% of GDP) in 2025. In 2014 Travel & Tourism directly supported 626,500 jobs (2.4% of total employment). This is expected to rise by 2.0% in 2015 and rise by 1.1% pa to 713,000 jobs (2.9% of total employment) in 2025. In 2014, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 6.3% of total employment (1,616,000 jobs). This is expected to rise by 2.4% in 2015 to 1,654,000 jobs and rise by 0.4% pa to 1,716,000 jobs in 2025 (6.9% of total). Visitor exports generated KRW 23,600.7 bn (3.1% of total exports) in 2014. This is forecast to grow by 1.5% in 2015, and grow by 3.4% pa, from 2015-2025, to KRW 33,379.4 bn in 2025 (2.7% of total). Travel & Tourism investment in 2014 was KRW 10,145.5 bn, or 2.3% of total investment. It should rise by 6.5% in 2015, and rise by 2.8% pa over the next ten years to KRW 14,281.5 bn in 2025 (2.2% of total).[12]

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,

[12] Source: https://www.wttc.org/-/media/files/reports/economic%20impact%20research/countries%202015/southkorea2015.pdf

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.

There are 25 civil airports in South Korea out of which 9 are international terminals. Incheon International Airport, sometimes referred to as Seoul-Incheon International Airport) is the largest airport in South Korea, the primary airport serving the Seoul Capital Area, and one of the largest and busiest airports in the world. The international airports are presented in the table below.

Location	Name
Busan (Pusan)	Gimhae International Airport
Cheongju	Cheongju International Airport
Daegu (Taegu)	Daegu International Airport
Muan	Muan International Airport
Jeju	Jeju International Airport
Seoul	Gimpo International Airport
Seoul	Incheon International Airport
Yangyang	Yangyang International Airport
Pohang	Pohang International Airport

There is a direct flight between New Delhi in India and Seoul in South Korea but there are other flights connecting both the countries via transit points of various international airlines. Asiana Airlines operates the direct flight between Delhi and Seoul.

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 10: Flight Prices

Fare in Indian rupees for travel to South Korea From India, as on June 1st, 2016	
Seoul	
(Indian Rupees)	Lowest prices
Delhi	INR 35,887
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 11: 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 Traveller Study Findings

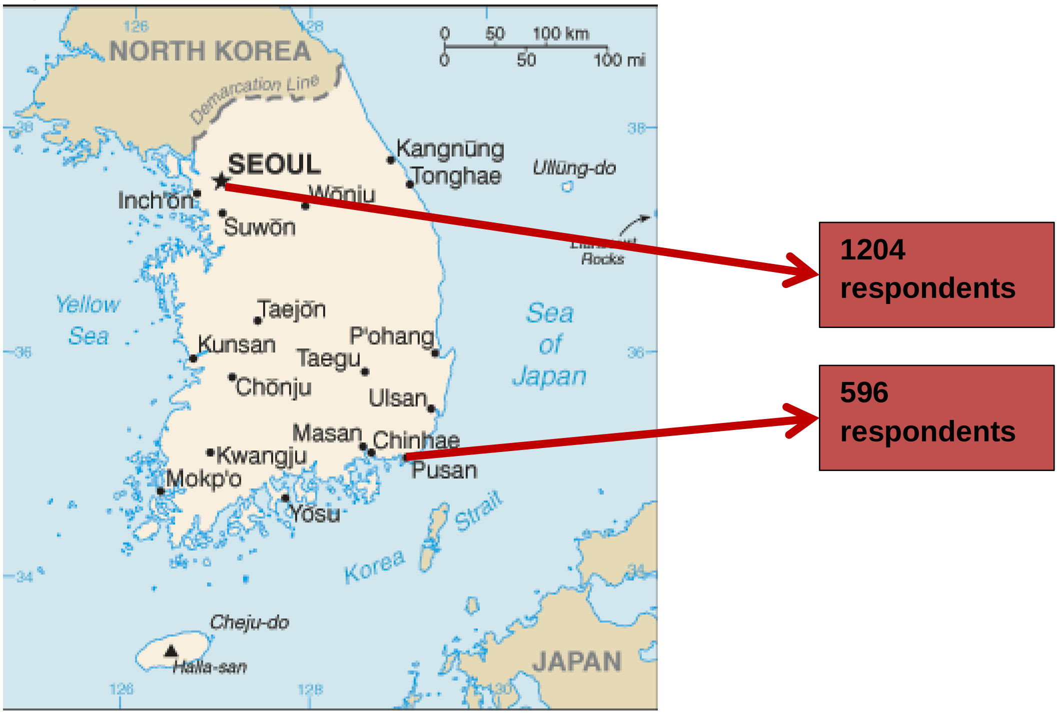
3.1 Past Outbound Travel Behaviour

3.1.1 Profiling Information

3.1.1.1 Place of Residence

The survey investigated 1800 respondents (persons who have travelled abroad in the last one year) from South Korea of which 33% of the travellers were from Busan and 67% from Seoul.

Figure 2: Distribution of Past Travellers by Place of Residence



Map Source: famouswonders.com

3.1.1.2 Age categories

41% of the respondents were in the age group of 36 to 50 years. 34% of the respondents, that is, 610 respondents were between 26 to 35 years of age. Overall, 75% of the respondents were in their peak productive years between 26 and 50 years of age.

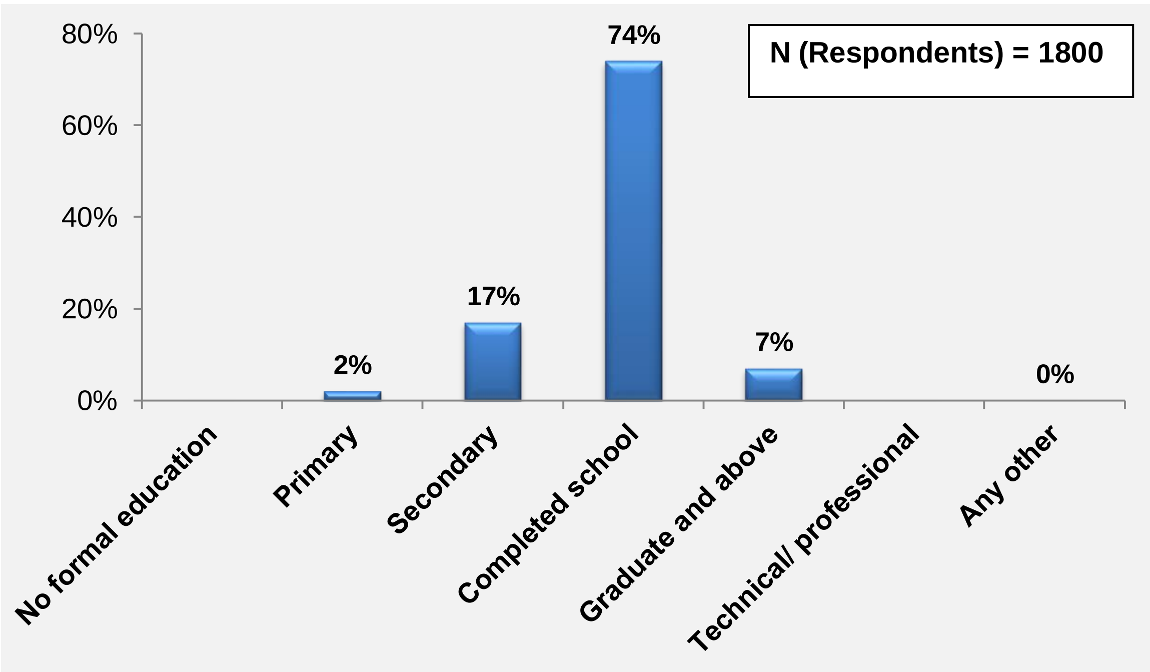
Table 12: Age Distribution

Age categories	No. of respondents	Percentage
Below 18 yrs	0	0%
18-25 yrs	305	17%
26-35 yrs	610	34%
36-50 yrs	742	41%
51-60 yrs	143	8%
Above 61 yrs	0	0%
Total	**1800**	**100%**

3.1.1.3 Educational Qualification of Respondents

74% respondents mentioned that they had completed school while 7% respondents out of the total 1800 past travellers to India and other countries mentioned that they had graduation degrees.

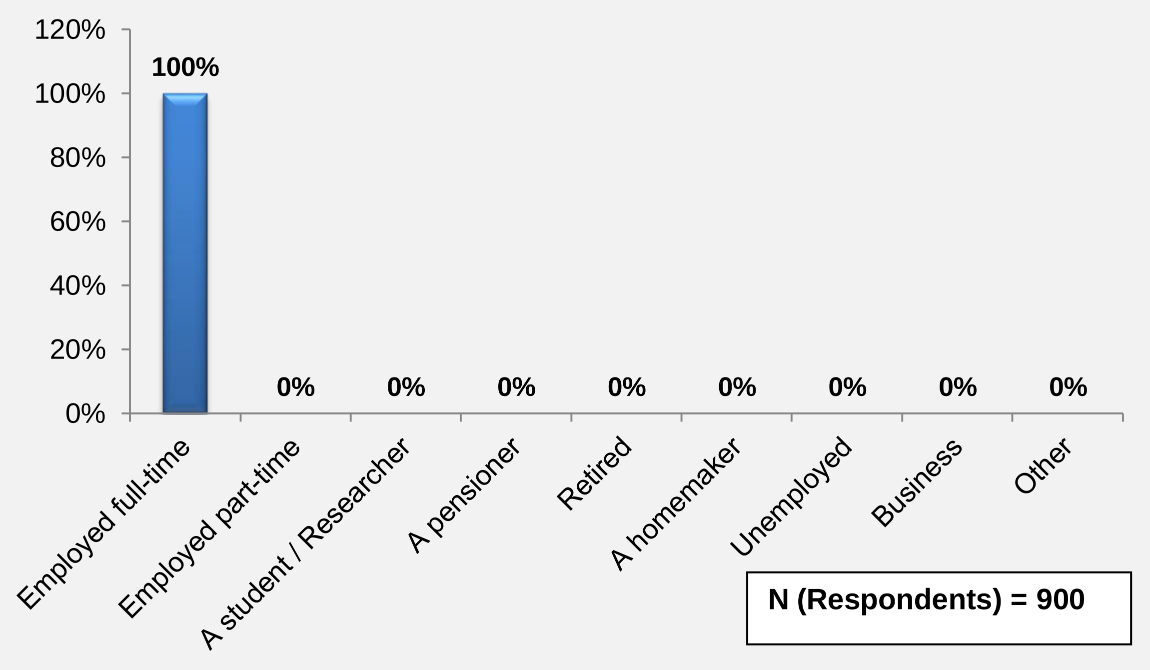
Figure 3: Educational Qualification of Respondents



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 17% of the survey participants. Overall, 300 women (past travellers) were interviewed during the primary survey across the six cities.

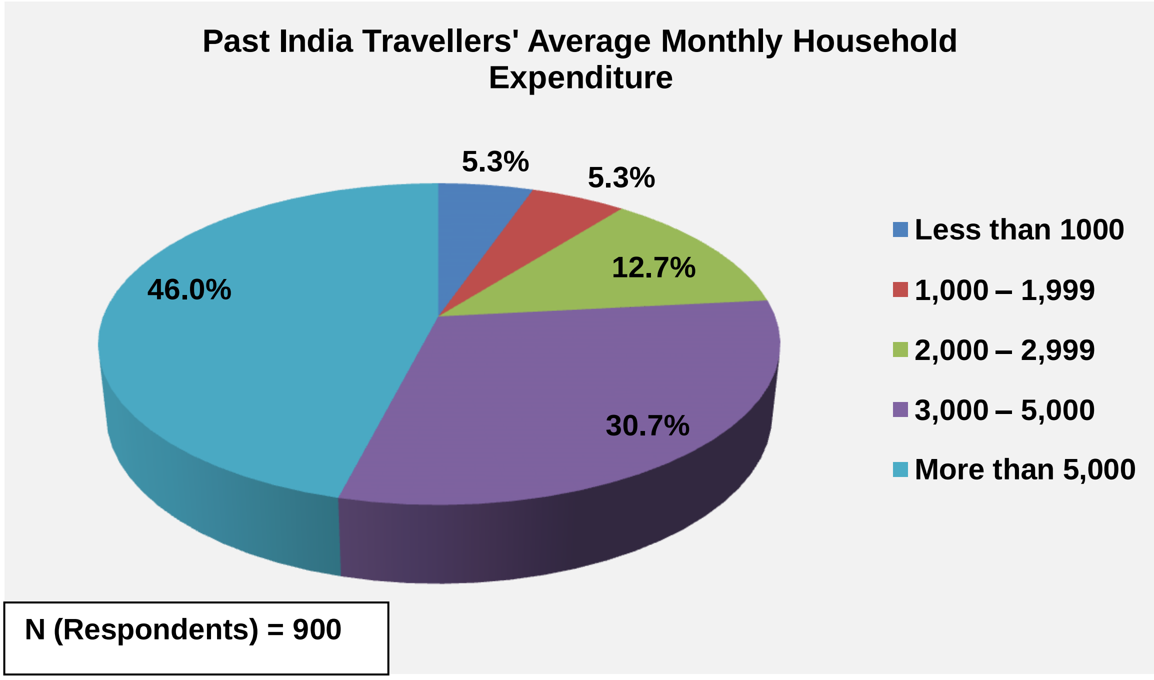
Table 13: Gender Distribution

Gender	No. of respondents	Percentage
Male	1500	83%
Female	300	17%
Total	**1800**	**100%**

3.1.1.6 By Average Monthly Household Expenditure of Past Travellers to India

30.7% 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 46%.

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

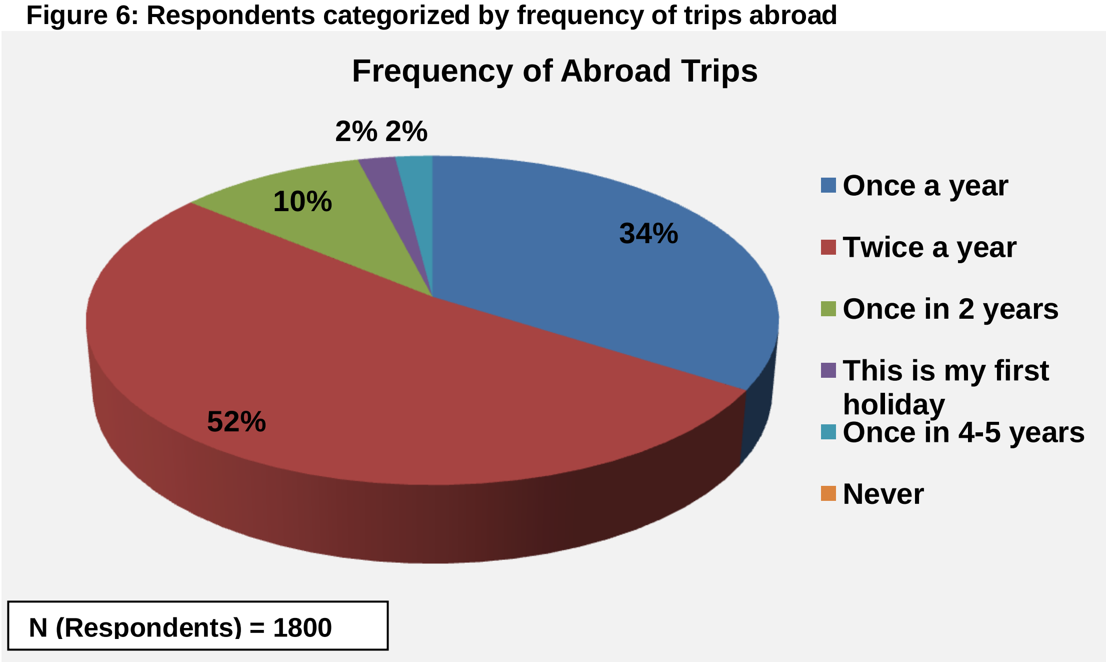


3.1.2 General Travel Behaviour

3.1.2.1 Frequency of trips abroad

Of the 1800 persons surveyed, 34% travel once a year. A substantive 52% travel several times in a year. 191 respondents travelled once in two years.

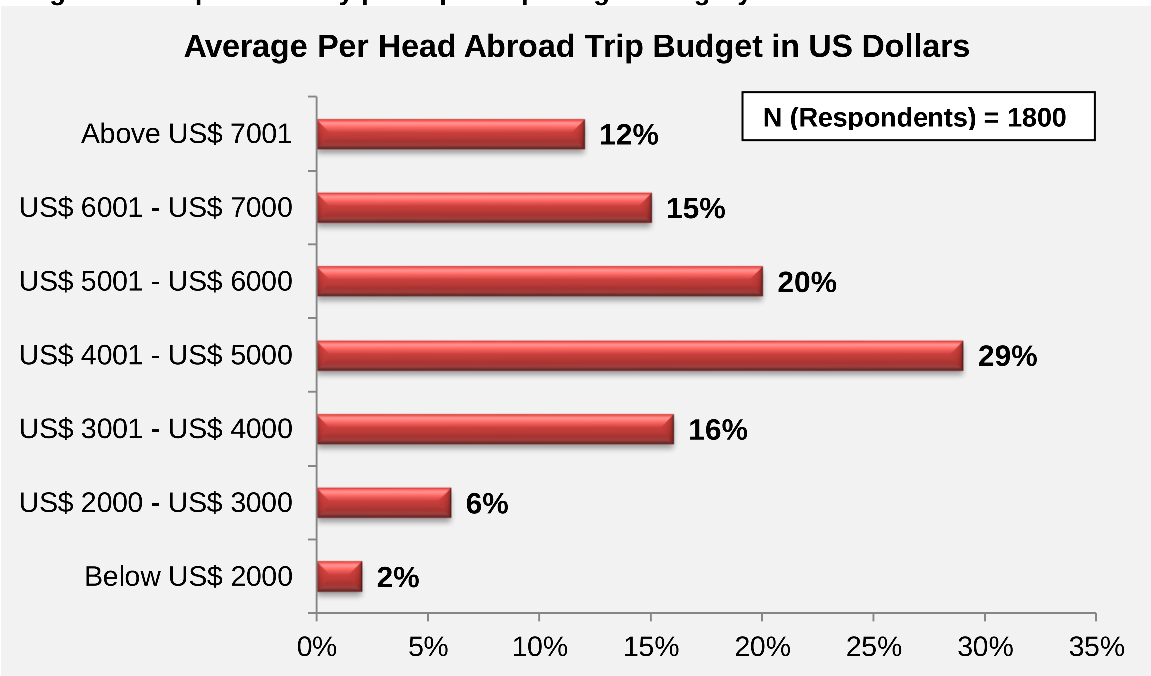
Figure 6: Respondents categorized by frequency of trips abroad



3.1.2.2 Average expenditure on trips

29% of the total 1800 travellers surveyed had a trip budget of US$ 4001 – US$ 5000 per head for a foreign trip. Another 16% budgeted in the range of US$ 3001– US$ 4000 per traveller. 12% of the respondents had an average budget of over US$ 7001 per head for an overseas trip.

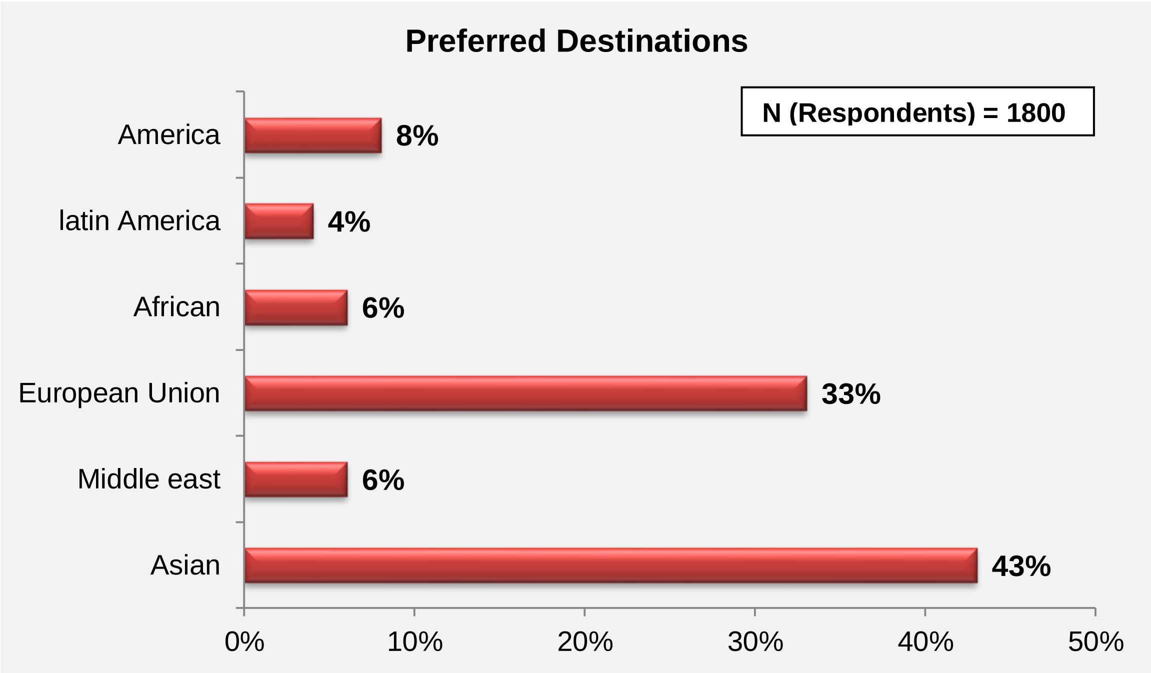
Figure 7: Respondents by per capita trip budget category



3.1.2.3 Preferred destinations

Respondents were asked to indicate their preferred foreign destinations for trips. In this analysis it was found that 43% of the responses were in favour of Asian destinations while another 33% responses showed in the inclination for EU. Of the 1800 responses received from 1800 respondents, 138 were in favour of countries in the North American continent while 6% respondents showed preference for African countries.

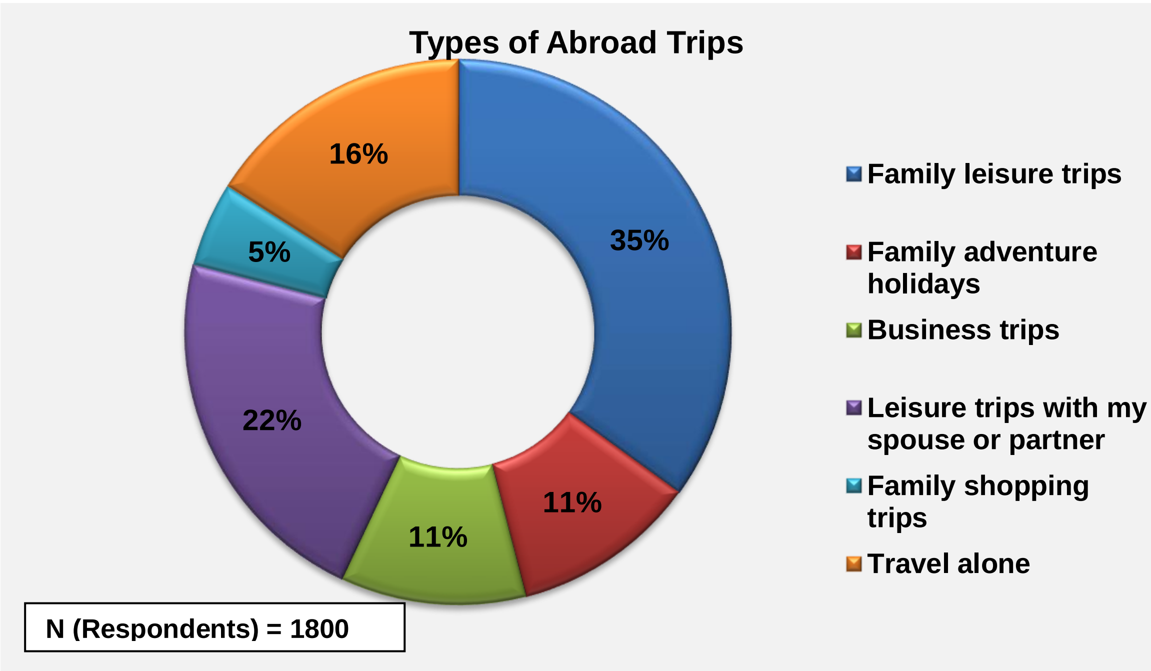
Figure 8: Revealed preferences for foreign destinations



3.1.2.4 Types of trip

35% of all 1800 respondents described their overseas trips in the last three years as family leisure trips. Around 11% claimed that they had travelled on business cum leisure trips. 11% also enjoyed adventure holidays with their families. 22% of the total 1800 respondents claimed that they went on a leisure trip with their spouse or partner.

Figure 9: Respondents categorized by frequency of trips abroad



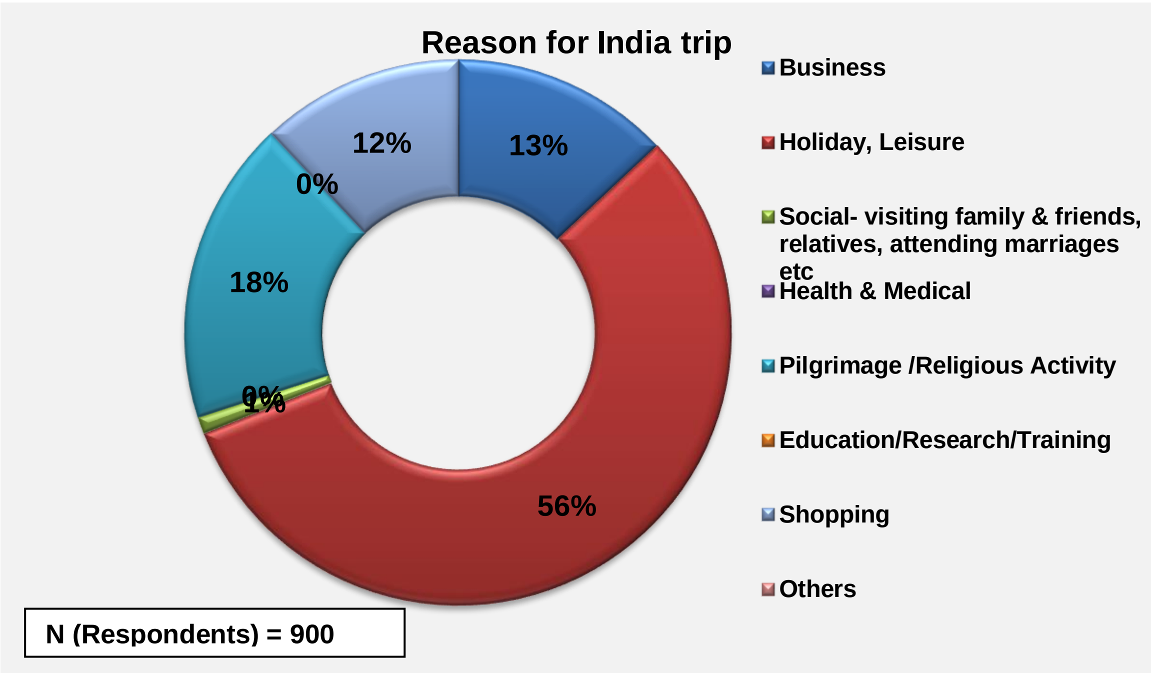
3.1.3 Travel Behaviour of Past Visitors to India

Of the 1800 respondents canvassed during the primary survey, 900 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 South Korea exists because of the holidays and leisure activities that can be done here. 56% of total 900 respondents indicated this. Other important reasons for travelling to India are pilgrimage/ religious activity (18% of the total 900 respondents). 12% responses were received in favour of shopping purposes.

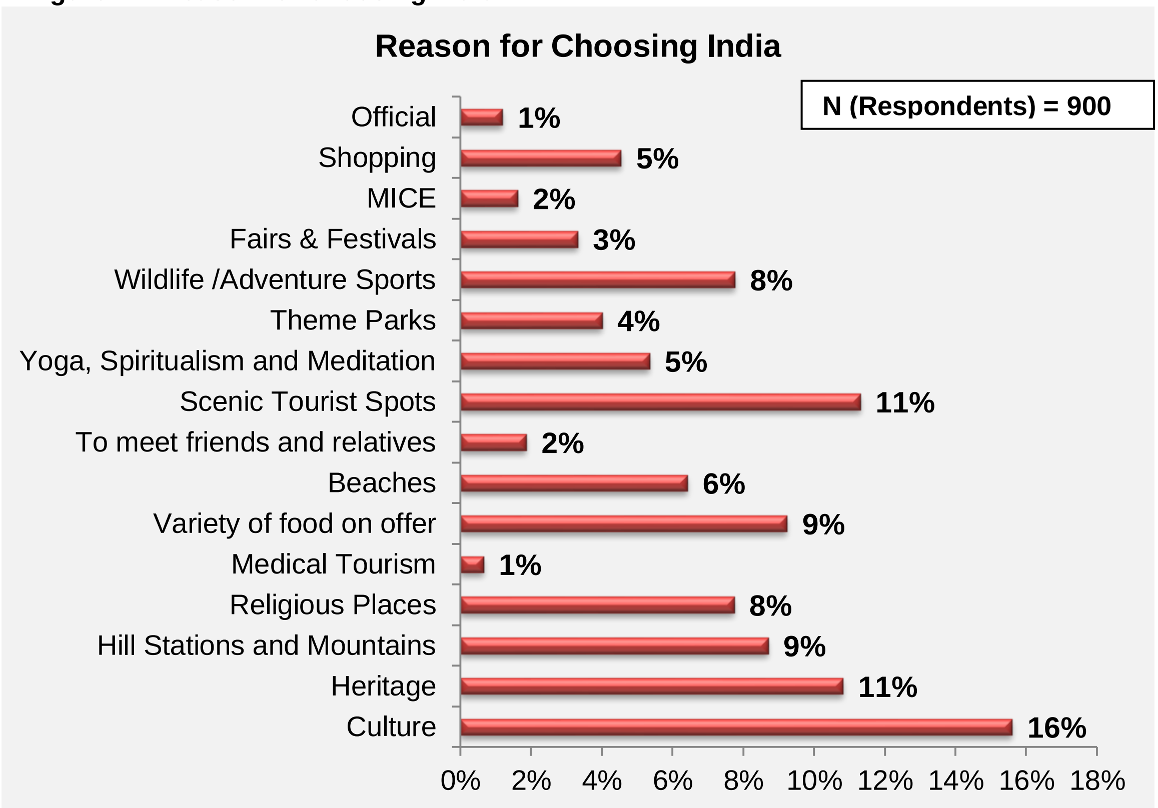
Figure 10: Reason for Travelling to India



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 South Korea exists because of the culture that India offers. 16% of total 4476 responses indicated this. Other important reasons for choosing India as a travel destination are scenic tourists spots (11% of the total 4476 responses) and heritage of India (11% of responses).

Figure 11: Reason for choosing India



3.1.3.3 Respondent's Medical Tourism Details in India

23 responses were received from past respondents about choosing India for their trip for medical tourism. When enquired about the state in India visited for medical tourism, all mentioned Delhi.

When enquired about the institutions in India visited for medical tourism, the responses received are as below.

Table 14: Institution in India Visited for Medical Tourism

Gender	No. of respondents	Percentage
AIIMS	12	52%
Apollo	11	48%
Total	**23**	**100.00%**

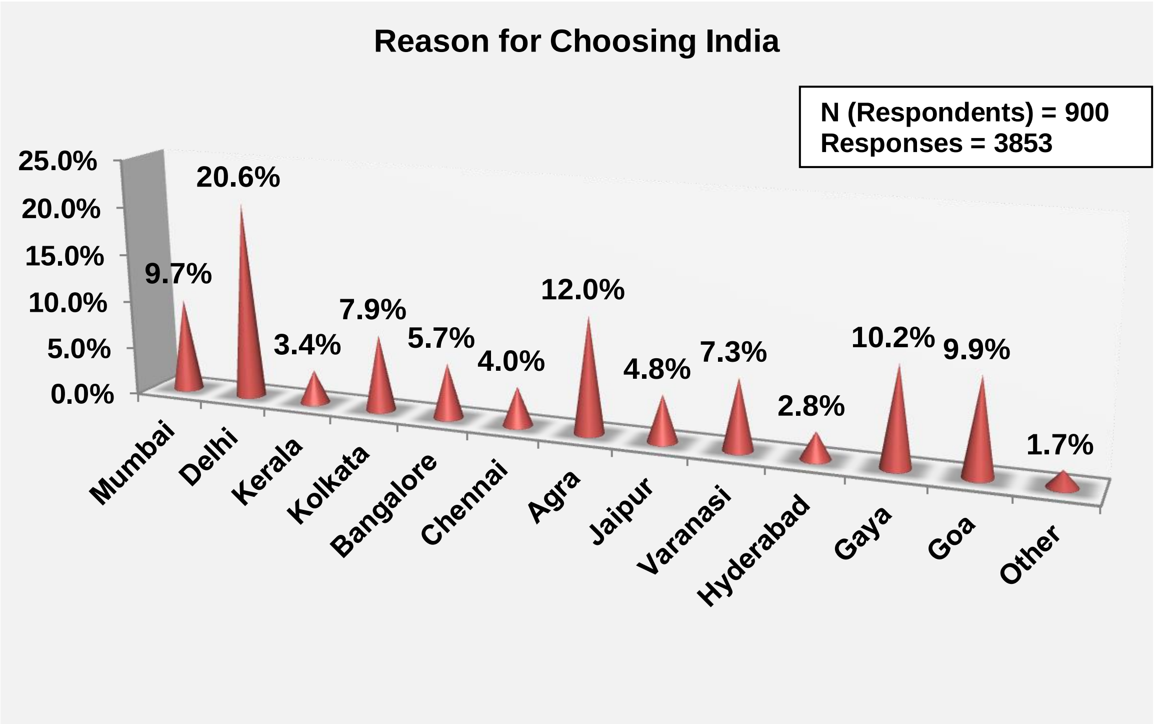
Table 15: Satisfaction Level with Medical Tourism in India

Gender	No. of respondents	Percentage
Fully satisfied	11	48%
Partially satisfied	12	52%
Not satisfied	0	0%
Total	**23**	**100%**

3.1.3.4 Cities Visited in India

900 past India travellers to India mentioned the cities they visited in India during their visit. 900 respondents provided 3853 responses regarding the cities in India they visited during their India trip. 20.6% of the total responses were received in favour of Delhi which came up as the most visited city in India by past South Korean travellers to India. The next most visited city in India emerged as Agra with 12% of total responses received.

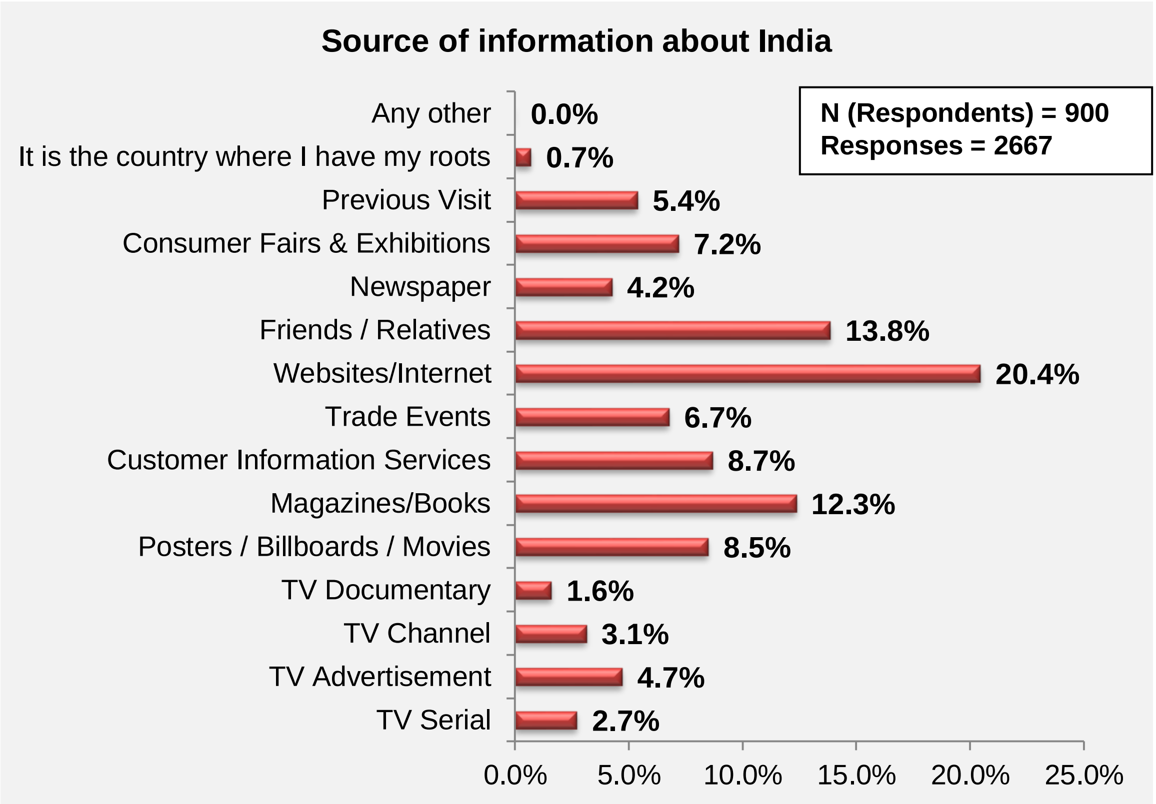
Figure 12: Cities Visited in India



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 20.4% of responses received indicated this. Friends and relatives and magazines / books are also an important source of information as was revealed by 13.8% and 12.3% of the responses received respectively. Many of them (5.4% of total responses) had visited India before.

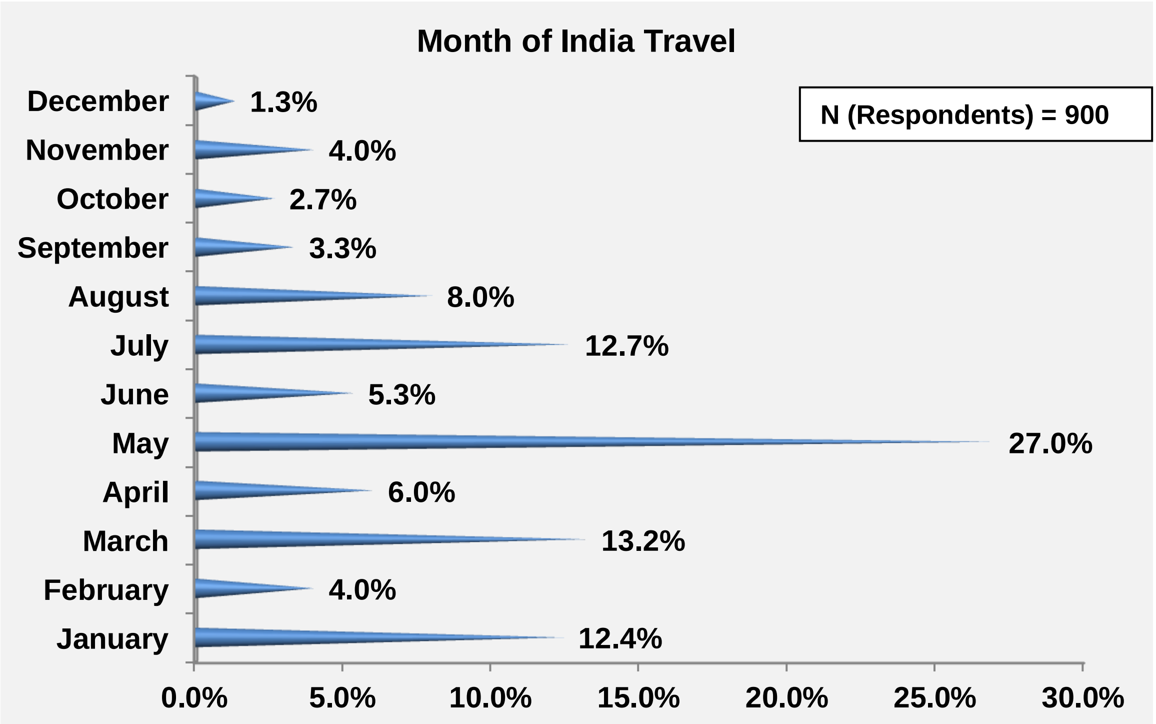
Figure 13: Source of information about India



3.1.3.6 Month of India Travel

900 past India travellers to India mentioned the month during which they visited in India. 27% of the total 900 respondents mentioned May to be their months of visit. March was the month of visit for 13.2% of the total 900 respondents. December was the month of least visits by South Koreans surveyed (1.3% of total 900 respondents).

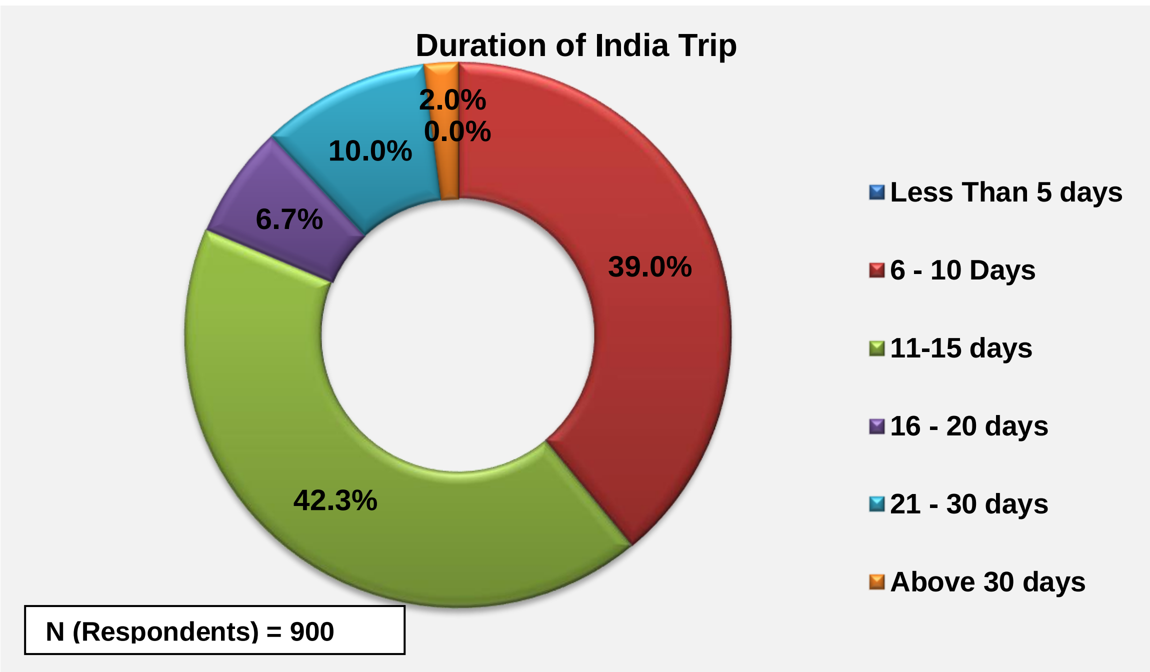
Figure 14: Month of India Travel



3.1.3.7 Duration of India Travel

39% of all 900 respondents mentioned that their India trip duration was of 6–10 days. While 42.3% of the total 900 respondents mentioned that their India trip lasted for 11–15 days. Only 2% of the total 900 respondents toured India for more than 30 days.

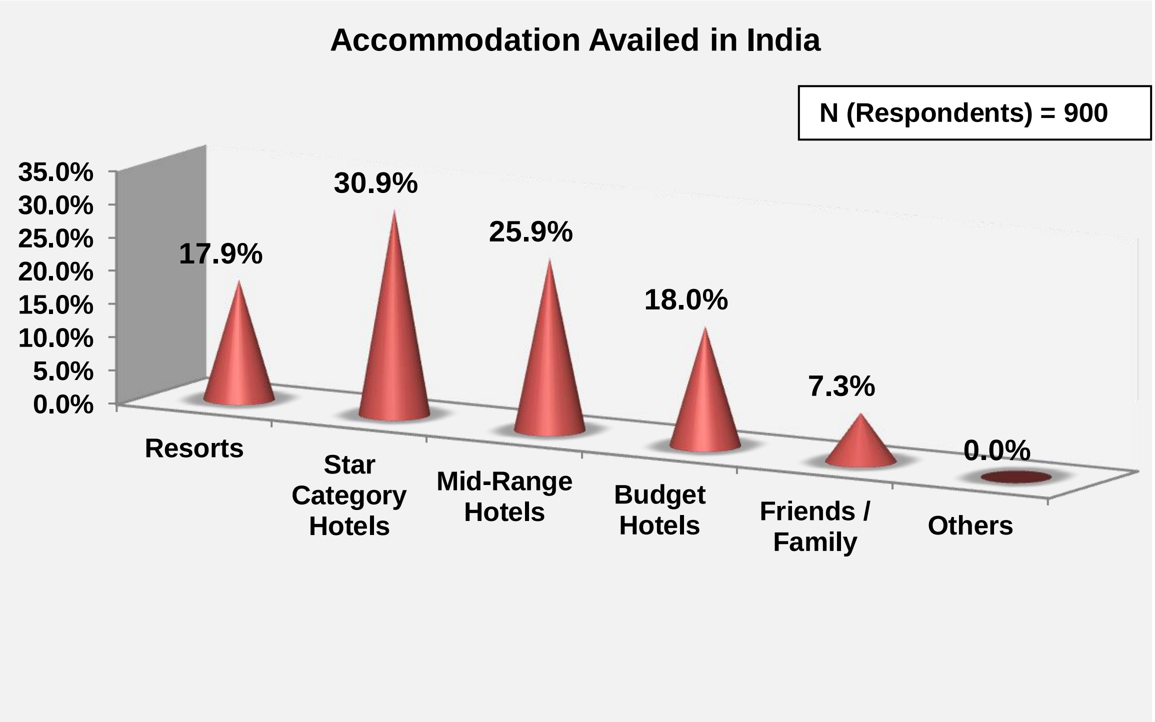
Figure 15: Duration of India travel



3.1.3.8 Accommodation Availed in India

25.9% of the total 900 past travellers to India mentioned that they stayed in mid-range hotels in India during their visit. 18% of the total 900 respondents provided mentioned that they stayed in budget hotels during their India trip. Only 7.3% of the total respondents stayed with their friends and relatives during their India trip.

Figure 16: Accommodation Availed in India

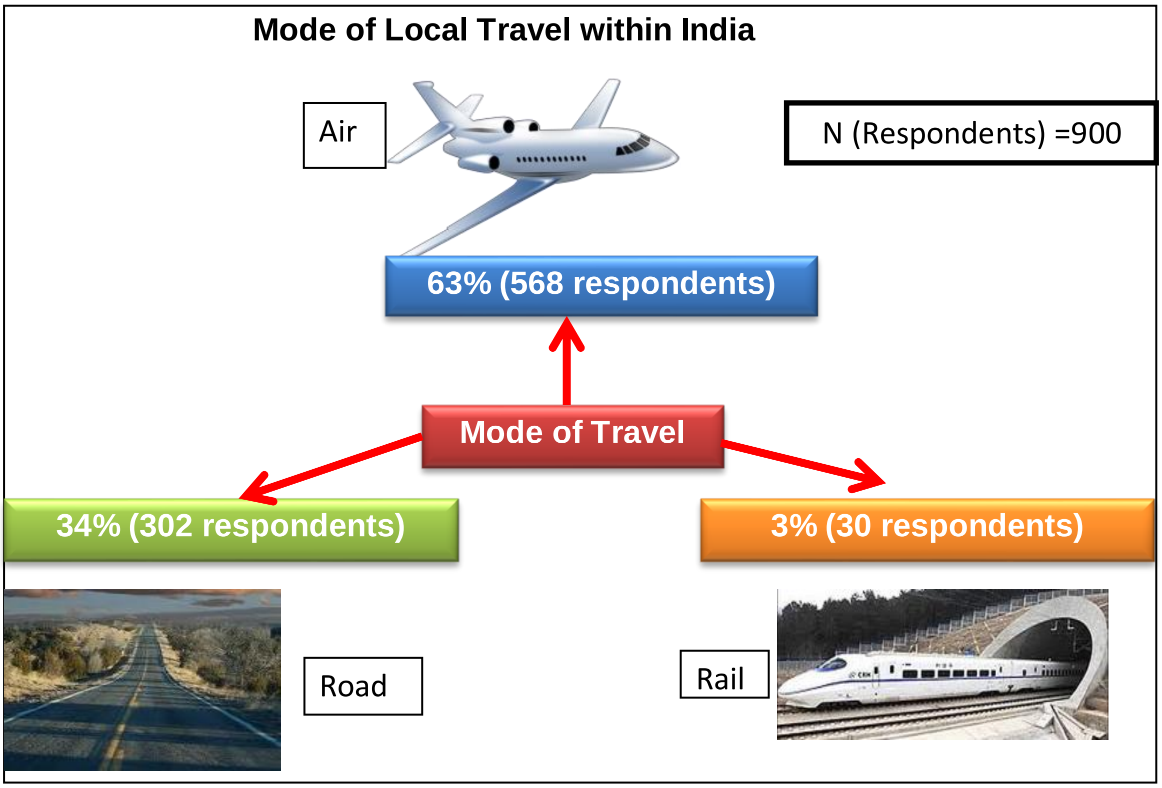


Note: Star category hotels: Hotels with more than 4 stars; Mid-ranged hotels: Hotels of 3 stars rating; Budget hotels: Hotels with 1-2 stars rating

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, 63% people travelled by air alone. Next most favoured mode of travel within India was by road (34% of the total 900 respondents). Only 3% of the total 900 respondents preferred to travel by rail within India.

Figure 17: Mode of Local Travel within India

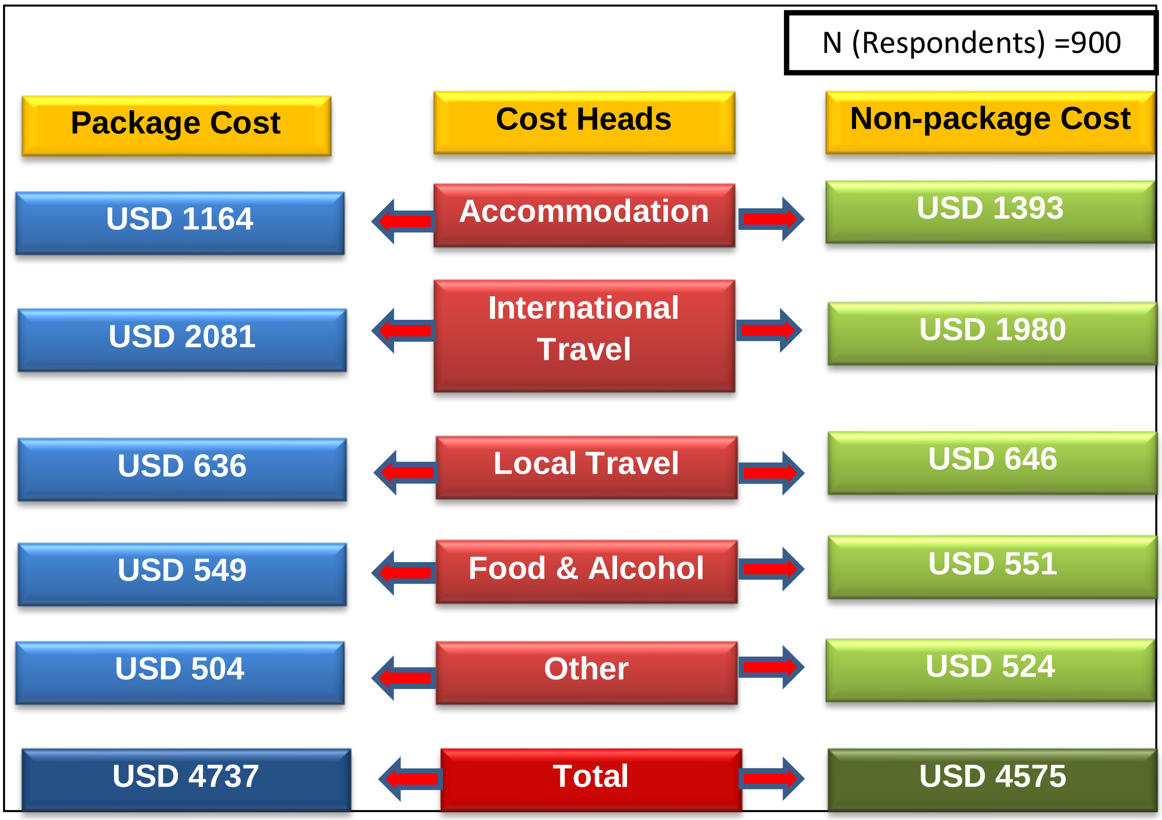


Of the 30 respondents who responded to the query on trains availed of, all 30 claimed to have availed of the luxury trains such as Palace on Wheels, Deccan Chariot and Indian Maharaja.

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.

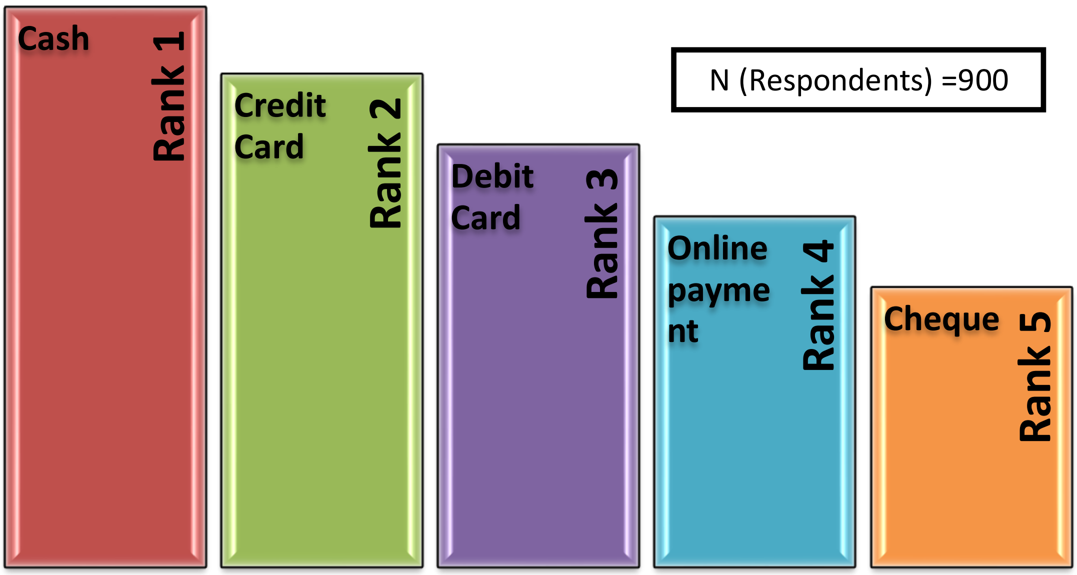
Figure 18: Average per Person Expenses for India Trip



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 South Korean travellers to India are presented below.

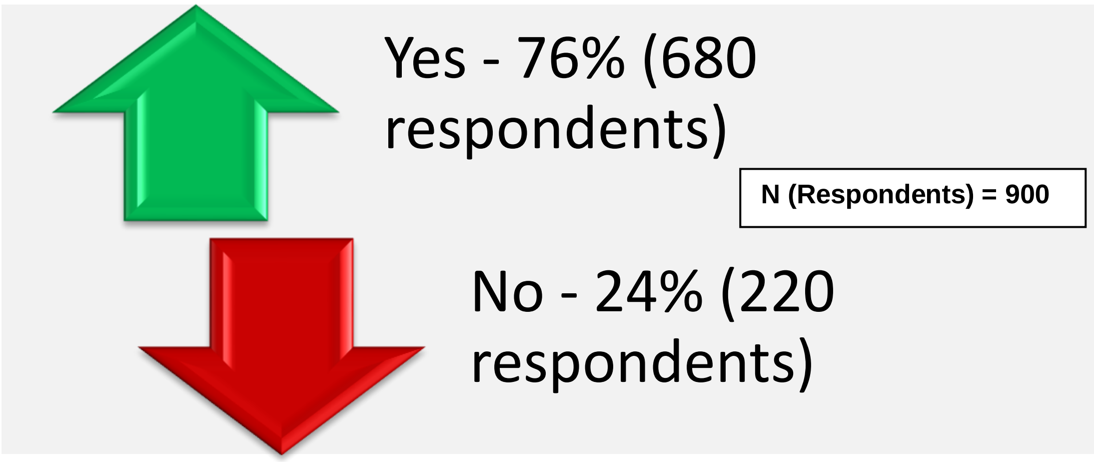
Figure 19: Payment Mode in India



3.1.3.12 Revisit India

Respondents who visited India were asked if they would revisit India in future and the responses received from 900 past South Korean travellers to India are presented below.

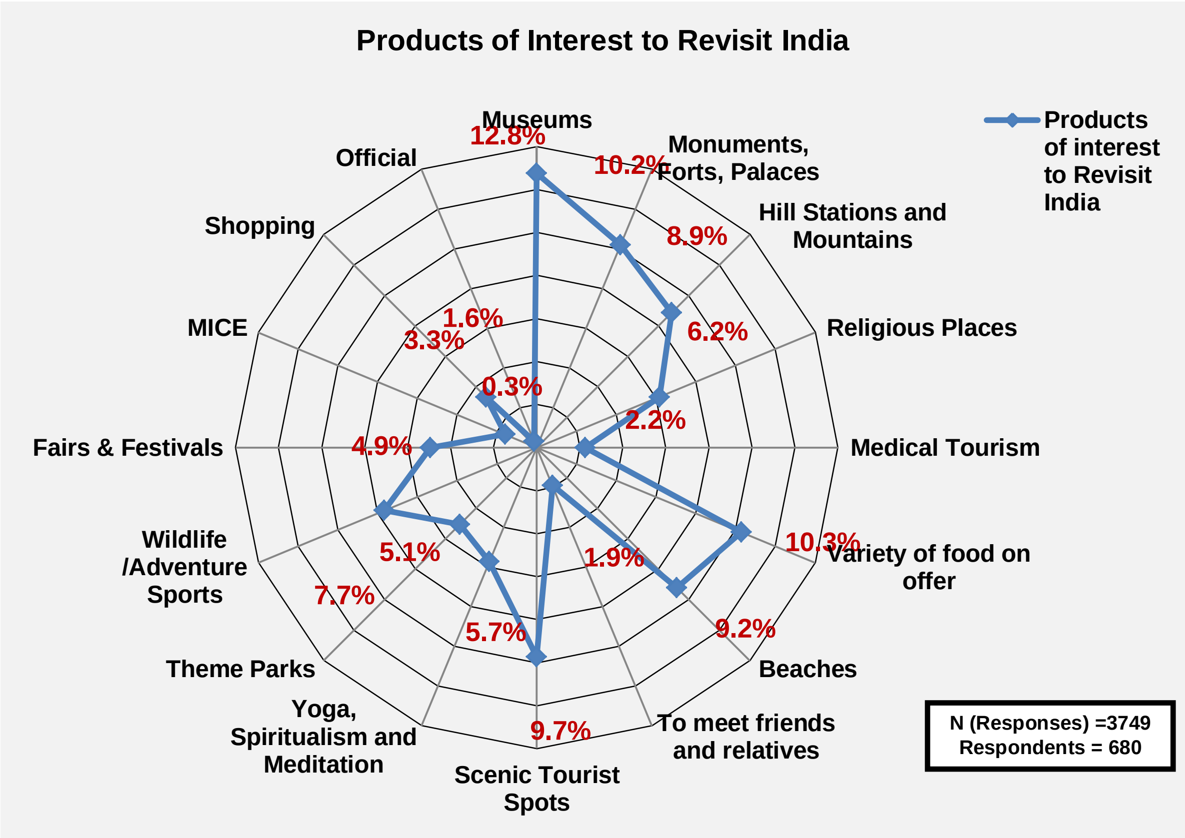
Figure 20: Revisit India



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 museums. There are a miniscule number (12 of 1866 responses) who plan to visit India on official purposes and another 60 responses indicating pursuits related to MICE to attract visitors to India.

Figure 21: Attractions for revisiting India



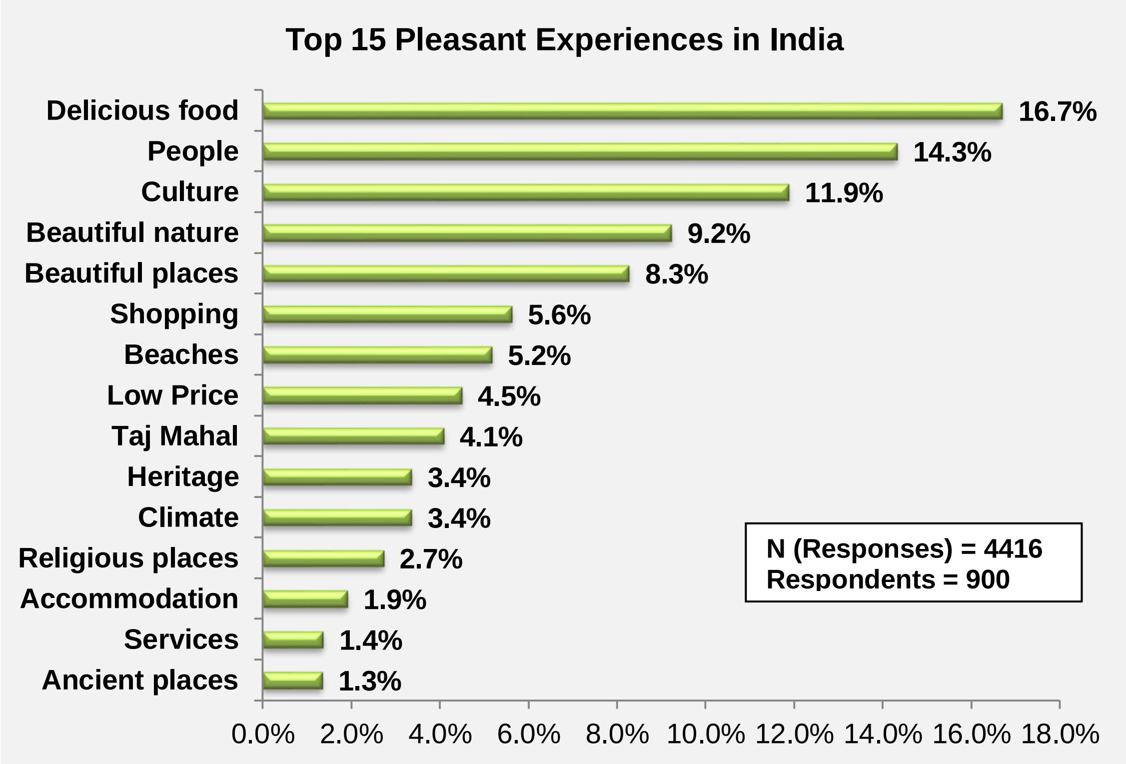
3.1.3.14 Reason for not revisiting India

The 220 persons of 900 who did express that they would not be revisiting India, cited problems related to high expenses of trip in India as the primary concern. Acquiring a visa and safety/ security were also important concerns cited.

3.1.3.15 Best and worst experiences in India

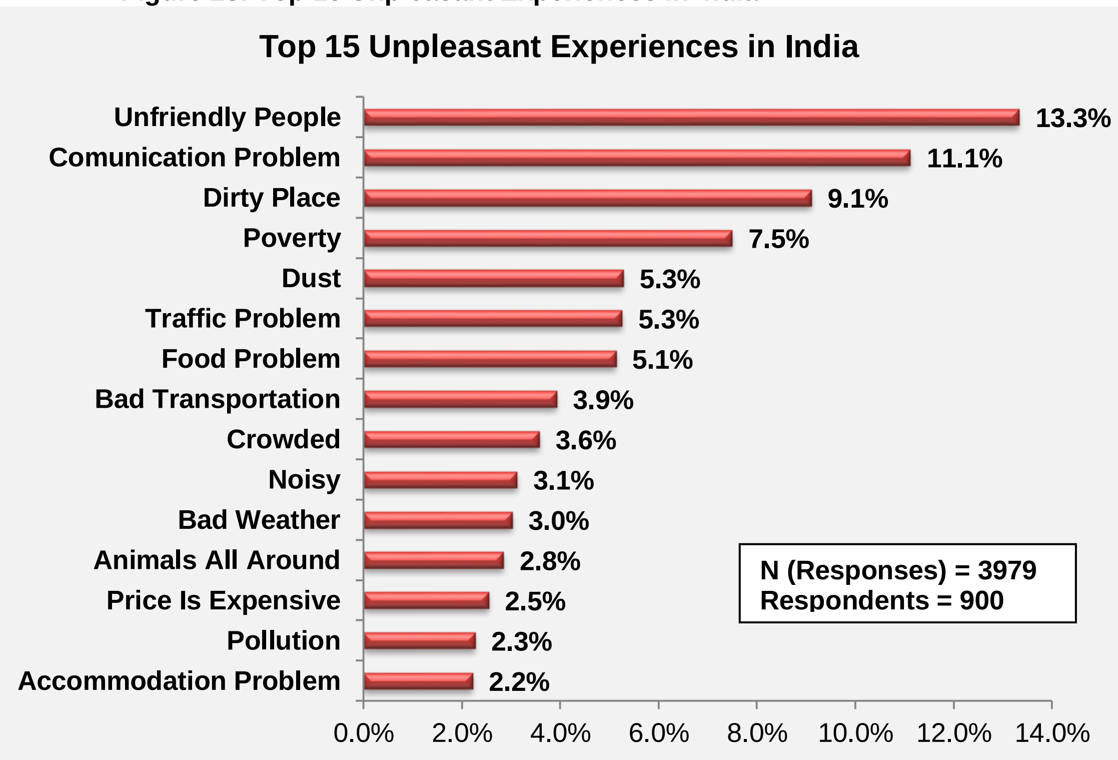
Tourists from South Korea, who have visited India, are very impressed by the delicious food in India and particularly happy with the hospitality warmth and kind-heartedness of the people in India. Those fond of food like India because of the vast cuisine it offers. Respondents who visited India were 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 delicious food (16.7% of the responses), friendly people (14.3% of the responses) and Indian culture (11.9% of the responses).

Figure 22: Top 15 Pleasant Experiences in India



Sources of discomfort or unpleasantness were cited as unfriendly people and communication problem. Many respondents felt that India is dirty in terms of hygiene. Poverty and dusty conditions in India were also cited as sources of unpleasantness.

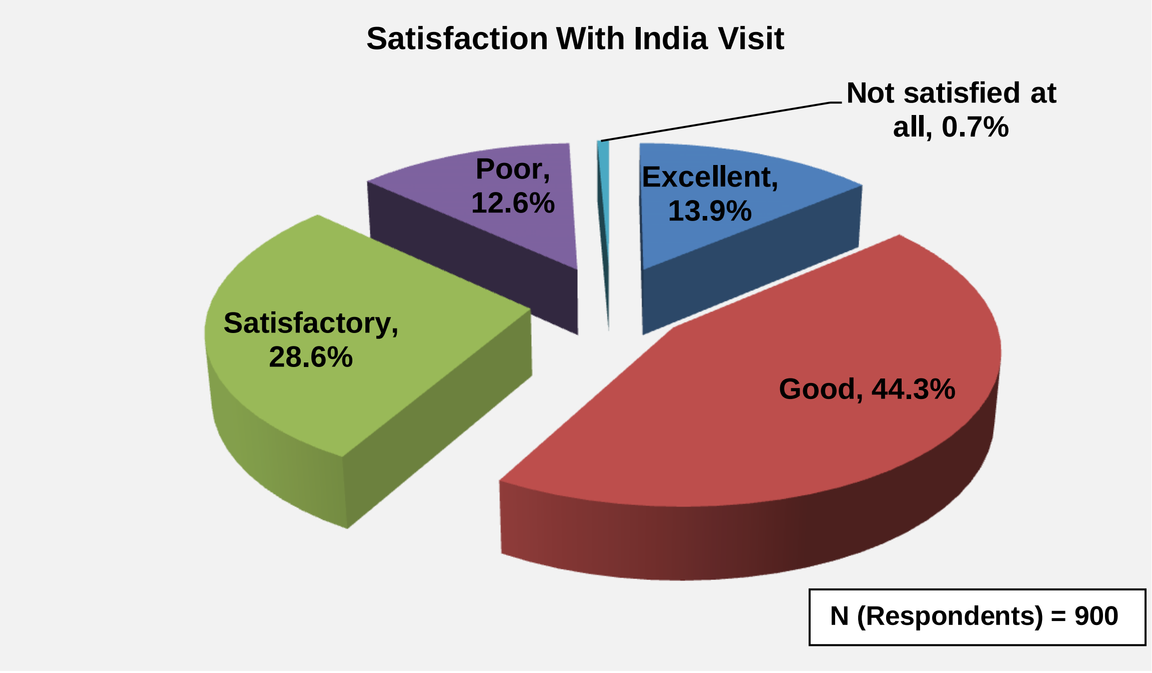
Figure 23: Top 15 Unpleasant Experiences in India



3.1.3.16 Satisfaction from visiting India

Overall, 44% of the 900 past travellers to India interviewed in the survey were satisfied with their experience in visiting India and mentioned it was “good”. As many as 13.9% in fact rated their India holiday experience as ‘Excellent’.

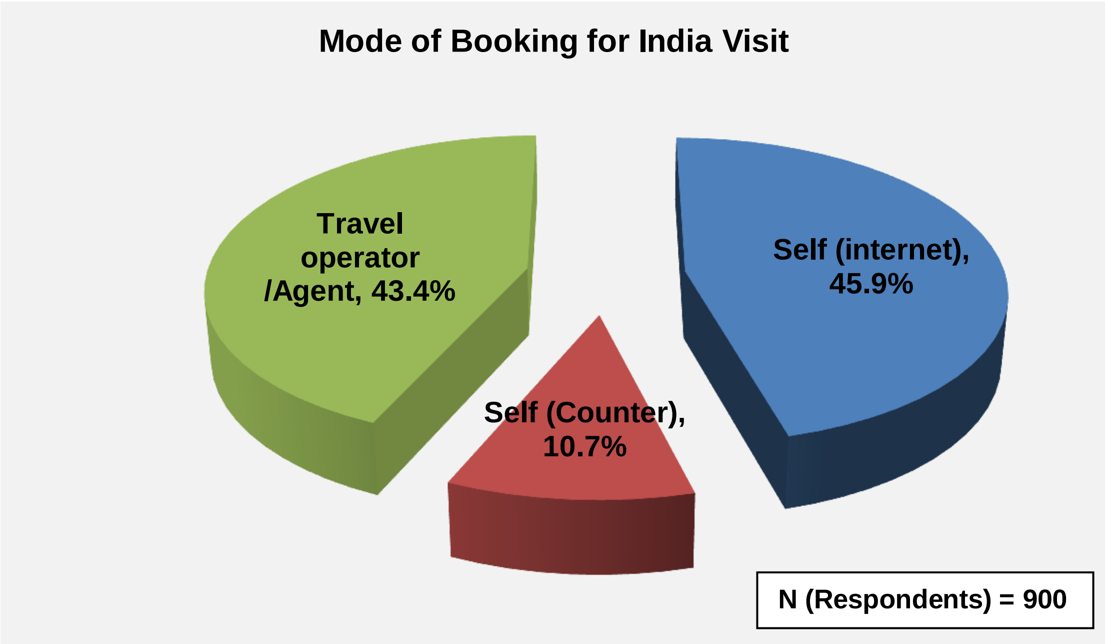
Figure 24: Satisfaction with Visit to India



3.1.3.17 Mode of booking

Around 45.9% of the respondents booked their tickets online themselves. Another 43.4% use travel agents while 10.7% of the total 900 respondents booked their tickets themselves over the counter.

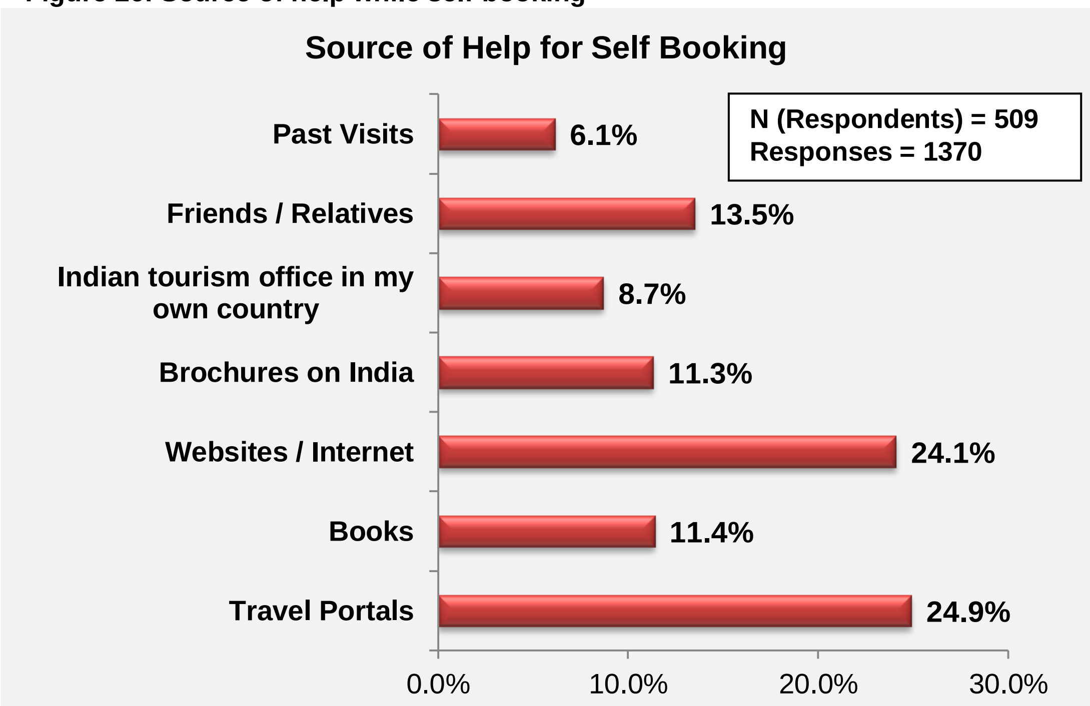
Figure 25: Mode of Booking for India Trip



3.1.3.18 Sources of Help While Self Booking

The 509 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 each for internet and 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. 13.5% responses showed that on occasion friends and relatives were also consulted.

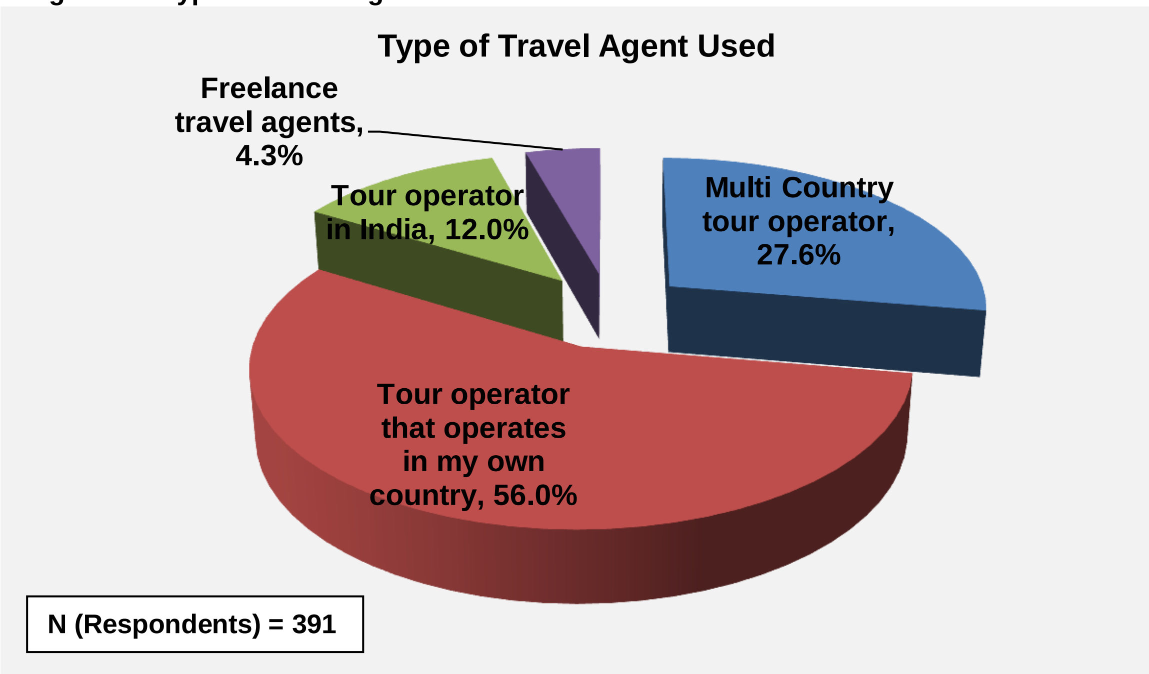
Figure 26: Source of help while self-booking



3.1.3.19 Type of tour operator used

Of the 900 respondents who travelled to India in the past, 391 respondents consulted tour operators. These persons were asked to reveal information about the type of tour operator consulted and single responses were received. It was found that in 56% of the cases these are operators from the South Korea. In 27.6% cases multi-country tour operators are also consulted. But consultation with Indian tour operators is lower at 12%.

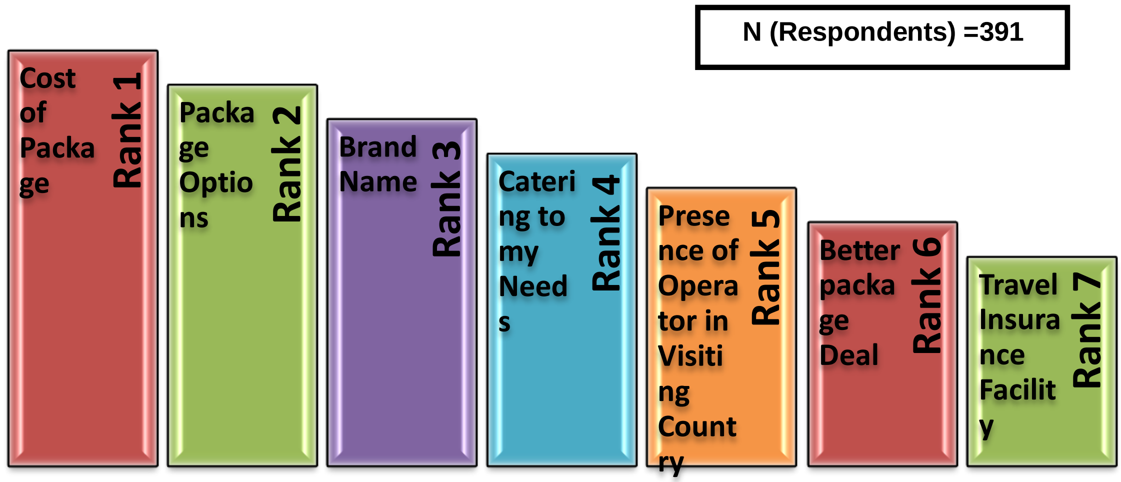
Figure 27: Type of Travel Agent Used



3.1.3.20 Tour operators selection criteria

In the choice of the tour operator, for these 391 respondents, the cost of the package offered were the key deciding factor followed by package options and brand name of the tour operator.

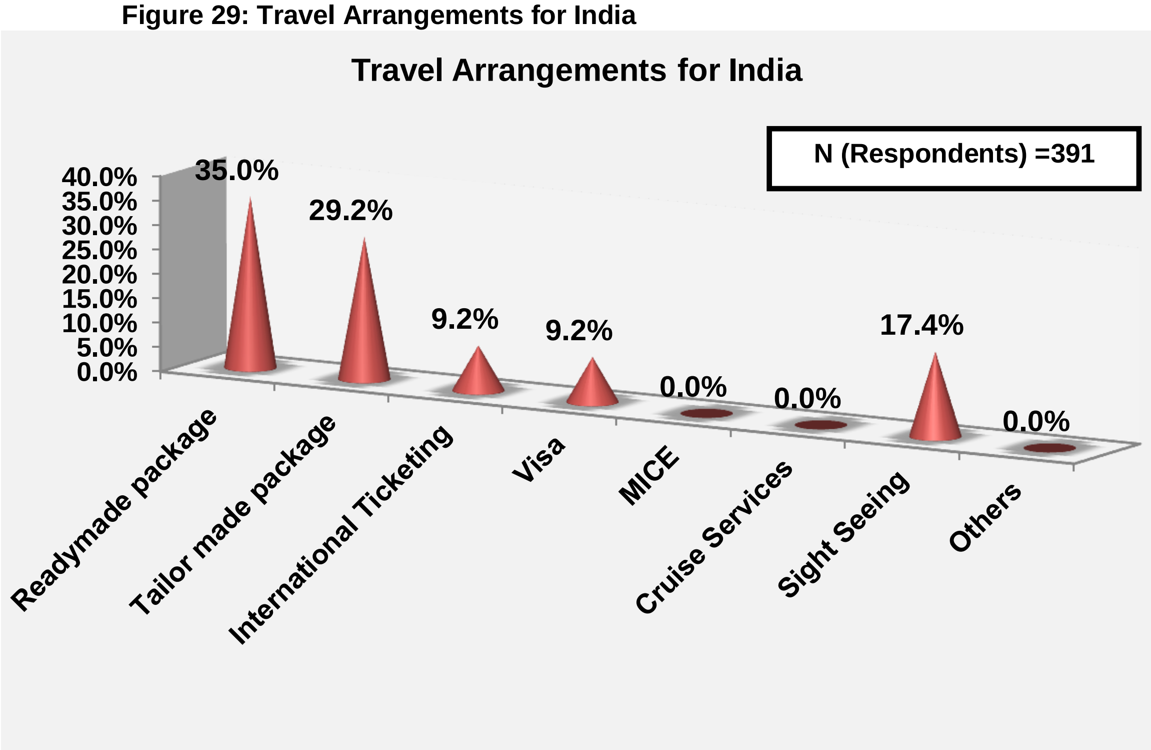
Figure 28: Tour Operators Selection Criteria



3.1.3.21 Travel Arrangements for India

The 391 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 (35% out to total 391 respondents) travellers opted for travel arrangement through tour operators 29.2% out of the total 391 respondents mentioned that tailor made package was the travel arrangement they chose.

Figure 29: Travel Arrangements for India

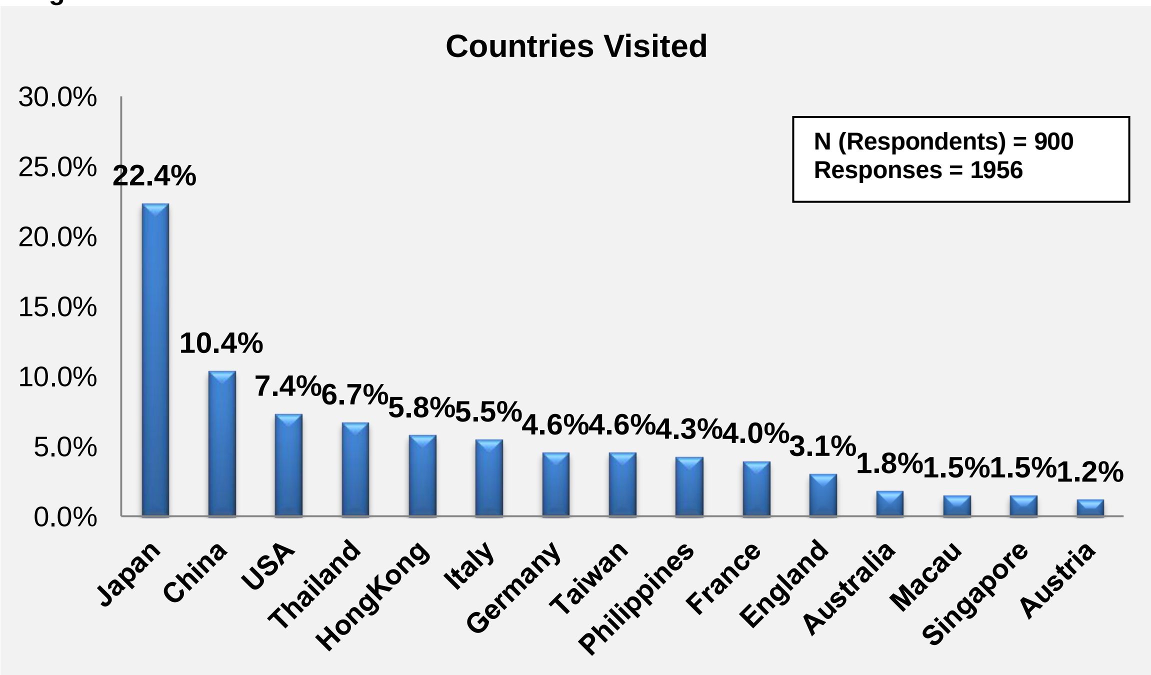


3.1.4 Travel Behaviour of Past Visitors to Other Countries

3.1.4.1 Countries Visited in past

Among the 900 respondents who had travelled out of South Korea in the past one year but not to India, the maximum visits have been made to Japan followed by China, USA and Thailand. Hong Kong, Italy and Germany are also quite popular amongst South Korean Travellers. These top countries constituted 85% of all responses.

Figure 30: Countries Visited



3.1.4.2 Reason for Travelling Abroad

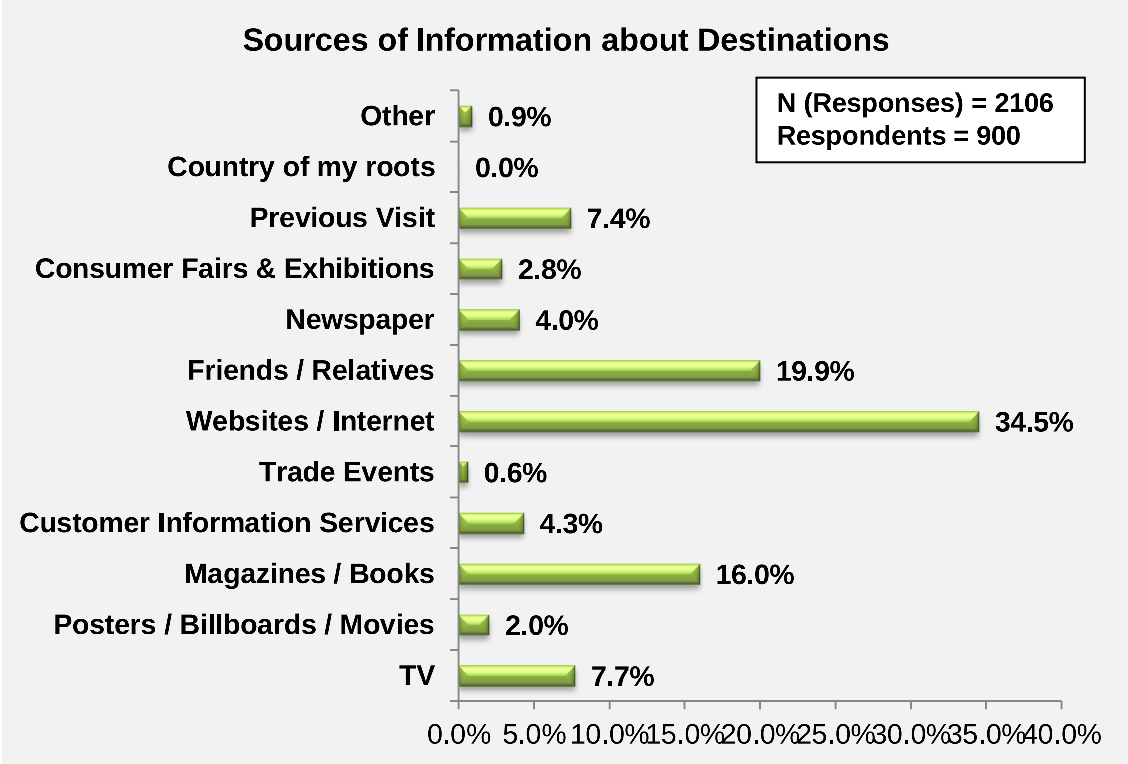
Respondents who visited countries other than India were asked to indicate the main driving factors for their decision to travel. The most commonly cited reason for travelling abroad was leisure or recreation (83.3% of total 900 respondents); while some other factors were to visit heritage and culture (7.3% of total 900 respondents) or education/ research (2.7% 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. 900 respondents yielded 2106 responses. A large number of travellers have found out about the destination countries in most cases from the internet or websites (34.5% of all responses). In many cases they have also heard from relatives and friends as also because they have been to the country earlier (19.9% of all responses). Magazines and books were also cited as sources of information (16% of all responses)

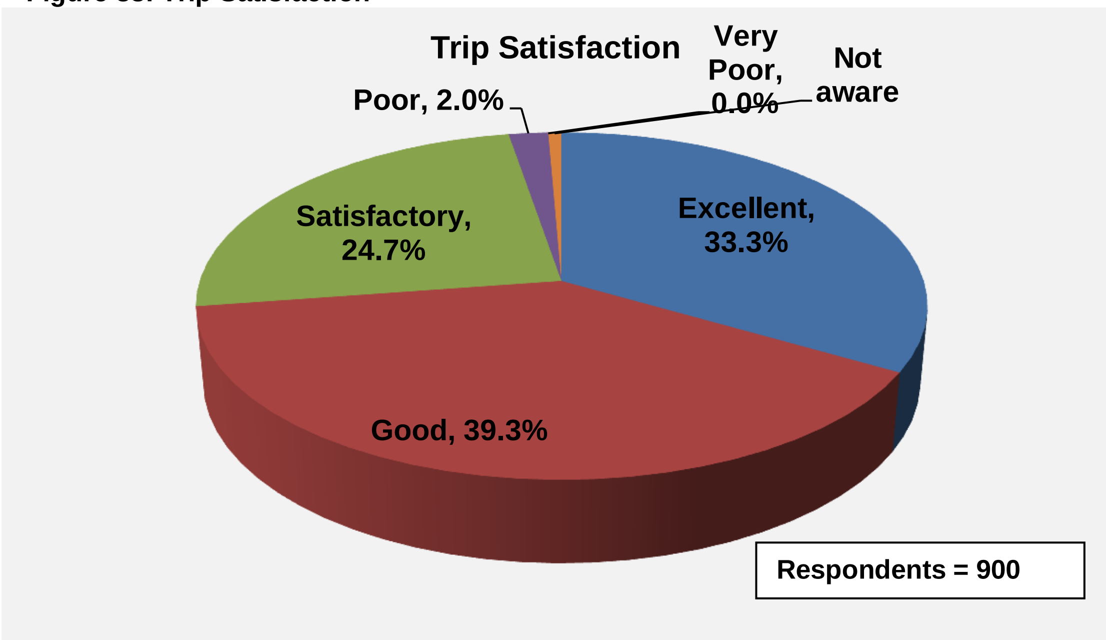
Figure 32: Sources of Information about Destinations Visited



3.1.4.4 Trip Satisfaction

An overwhelming 72.7% of the respondents believed that their experience had been good to excellent.

Figure 33: Trip Satisfaction



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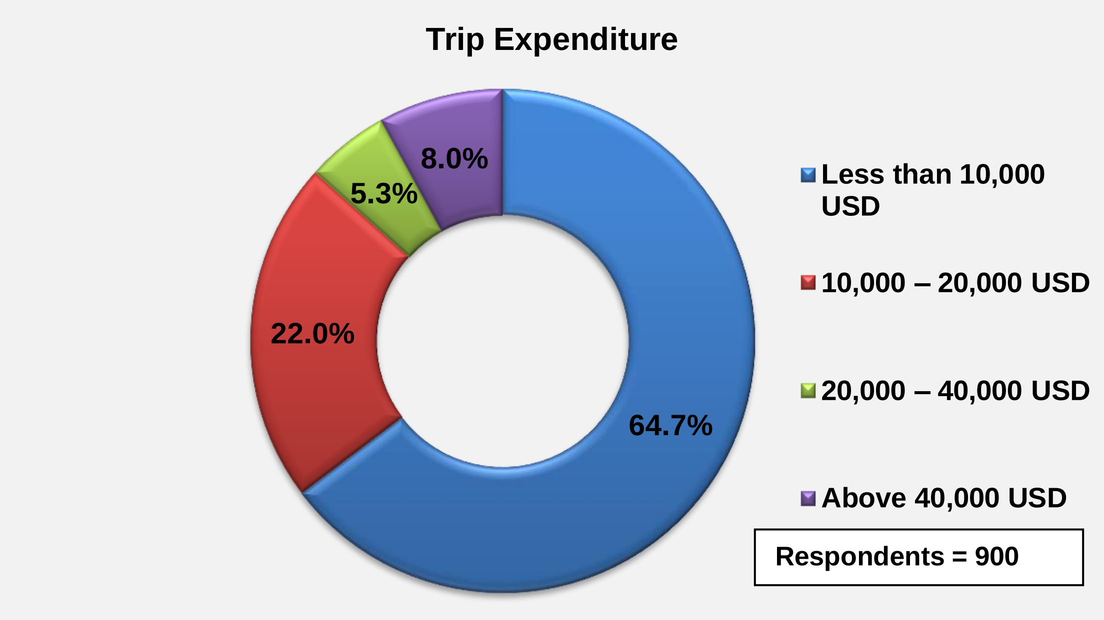
3.1.4.5 Trip Expenditure

An overwhelming 64.7% of the respondents spent less than USD 10,000 for their entire trip in total.

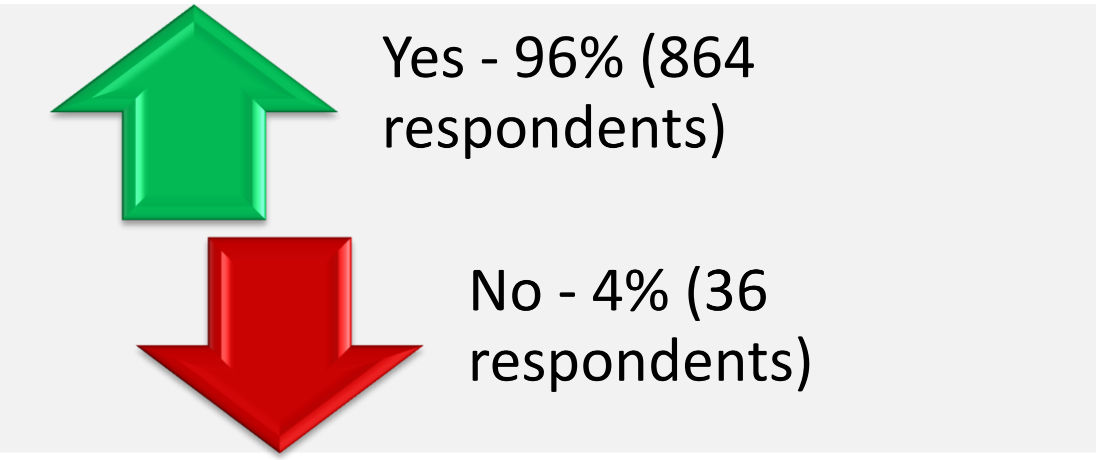
Figure 34: Trip Expenditure



3.1.4.6 Value for money destinations visited

An overwhelming 96% of the respondents out of the total 900 respondents believed that their experience had been worth the money they spent.

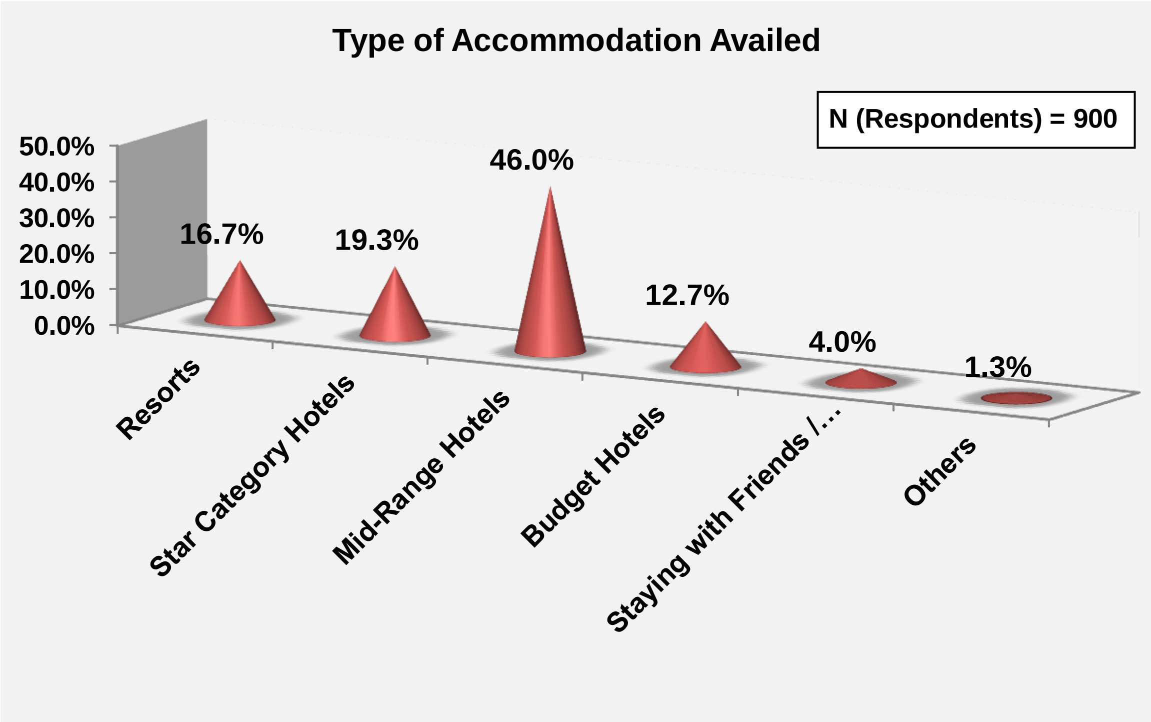
Figure 35: Value for Money Destination



3.1.4.7 Type of accommodation used

About 46% of all 900 respondents who travelled to countries other than India stayed in mid-range hotels during their visit. 12.7% stayed in budget hotels while about 4% stayed with friends and relatives. Only 174 of the 900 respondents spent on star category 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 900 respondents who travelled abroad in past is presented in the figure below.

Figure 37: Package and Non-package Expenses

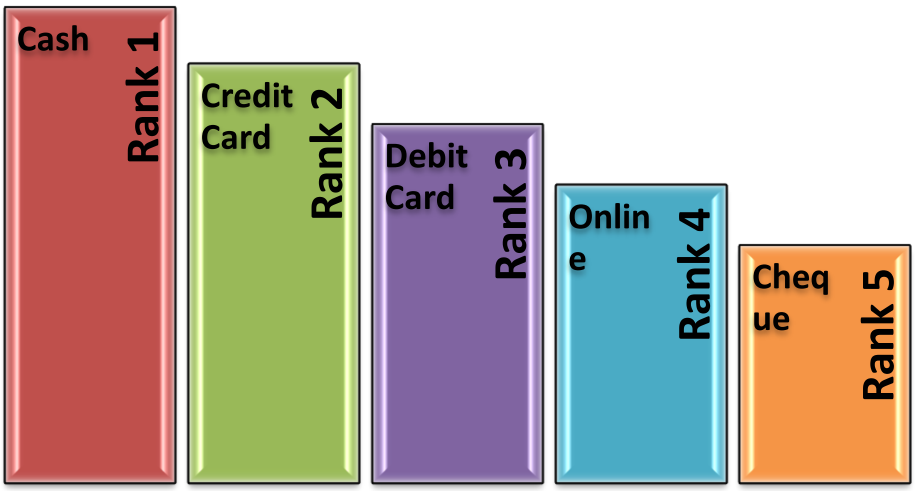
N (Respondents) =900

Package Cost	Cost Heads	Non-package Cost
USD 1068	Accommodation	USD 1262
USD 2196	International Travel	USD 2148
USD 717	Local Travel	USD 661
USD 608	Food & Alcohol	USD 615
USD 422	Other	USD 552
USD 4975	Total	USD 5238

3.1.4.9 Mode of Payment

The 900 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 900 respondents was cash.

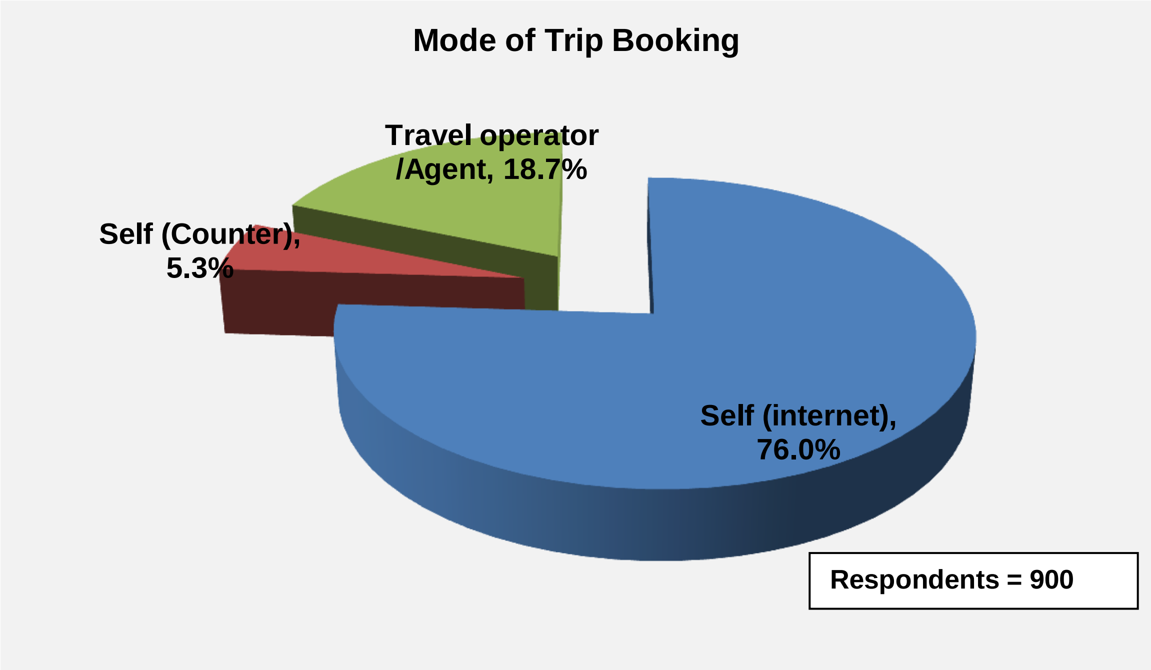
Figure 38: Mode of Payment



3.1.4.10 Mode of Trip Booking

About 76% of all 900 respondents who travelled to countries other than India booked their trips themselves.

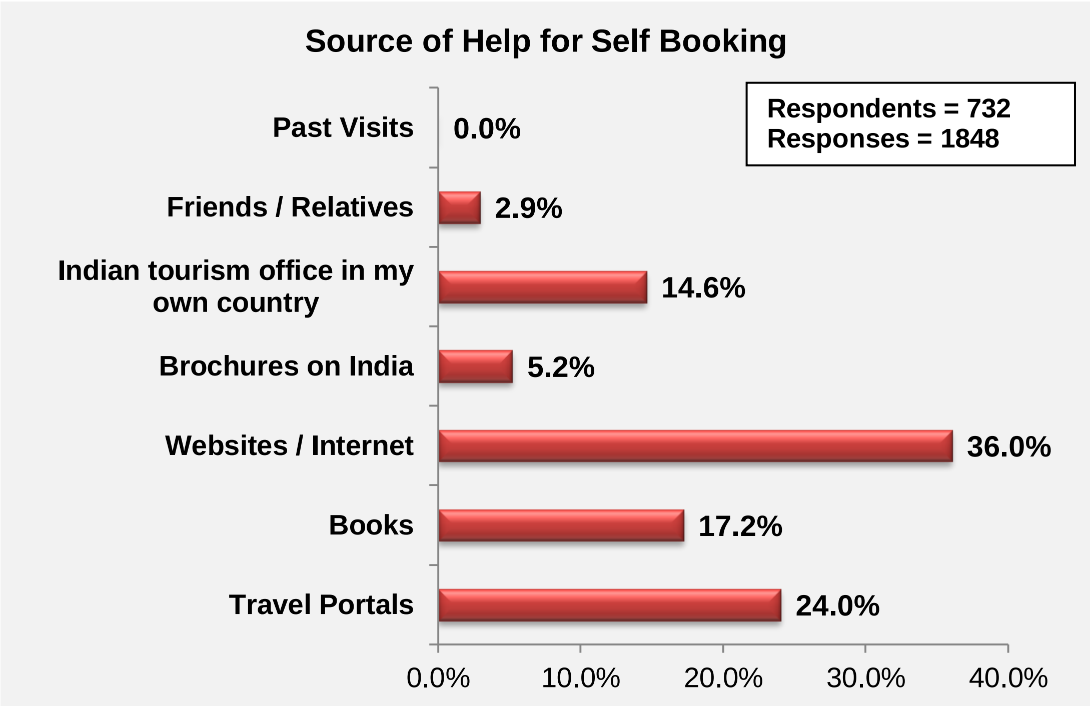
Figure 39: Mode of Trip Booking



3.1.4.11 Help While Self Booking for Trip

The 732 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.1848 responses were received from the 798 respondents and 36% of responses indicated that the major source of help was websites/ internet.

Figure 40: Source of Help for Self Booking



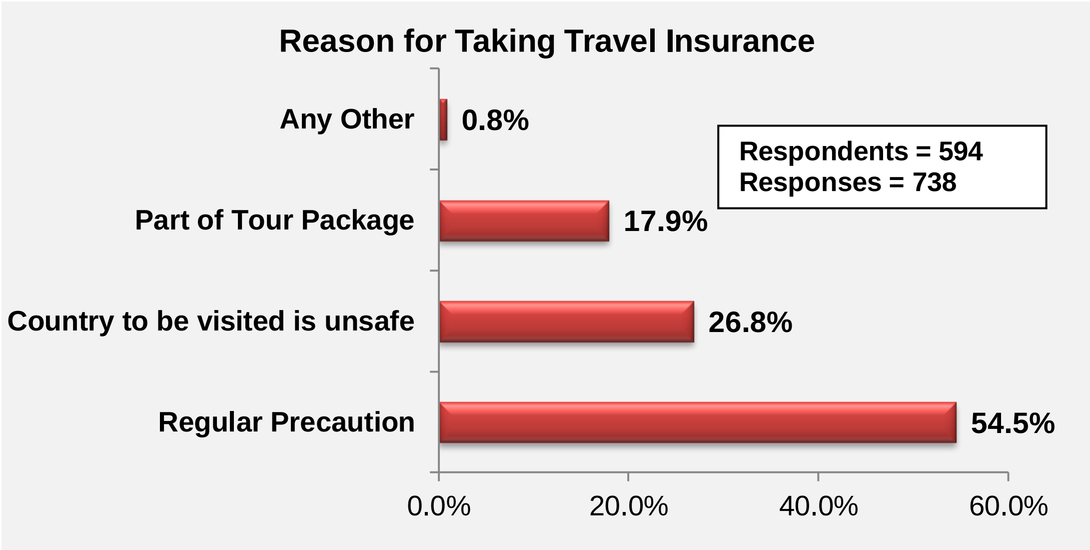
3.1.4.12 Travel Insurance Availed

About 66% of total 900 respondents who travelled to countries other than India availed travel insurance for their trip.594 respondents opted for travel insurance while 306 respondents (34% of 900 respondents) did not opt for travel insurance.

3.1.4.13 Reason for Taking Travel Insurance

About 54.5% of 594 respondents who availed travel insurance mentioned that they took it just for regular precaution.

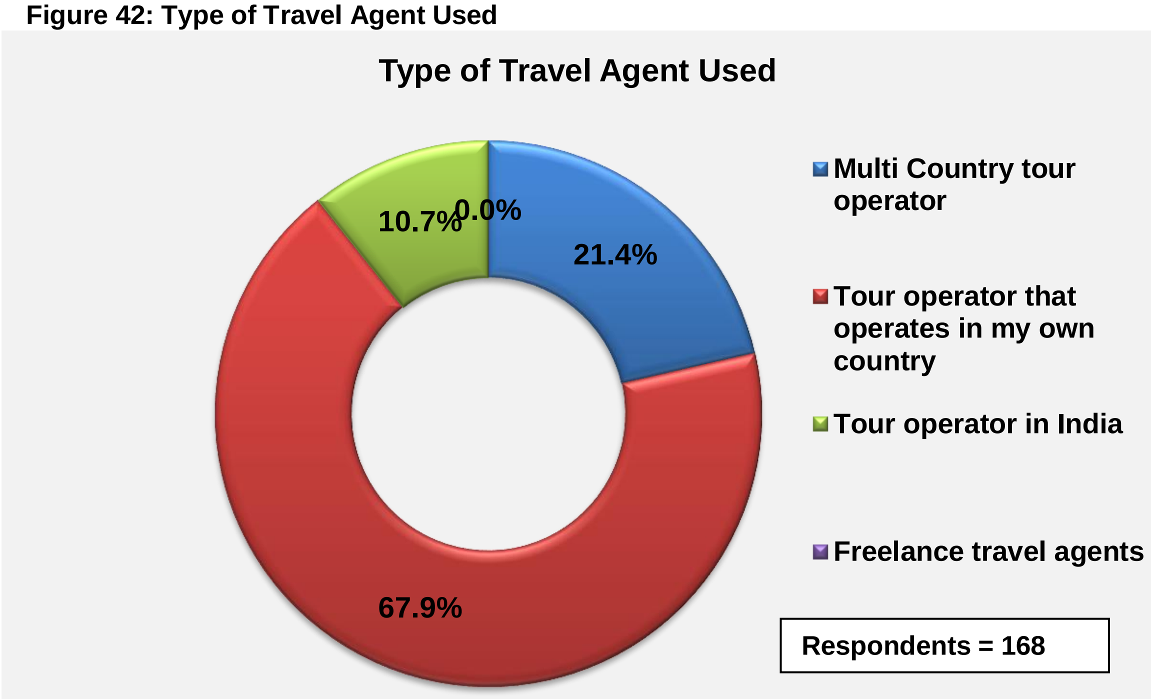
Figure 41: Reason for Taking Travel Insurance



3.1.4.14 Type of Travel Agent Used

About 67.9% of the total of 168 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.

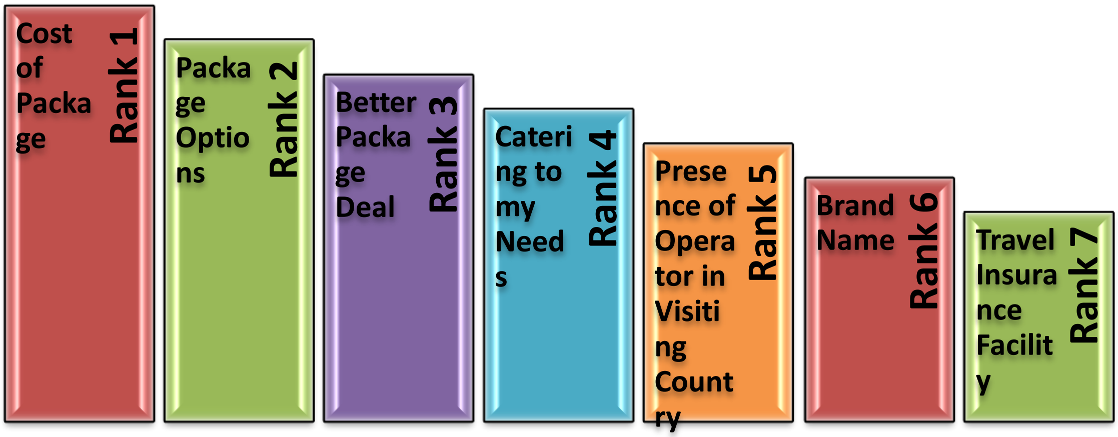
Figure 42: Type of Travel Agent Used



3.1.4.15 Selection Criteria of Tour Operators

The 168 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.

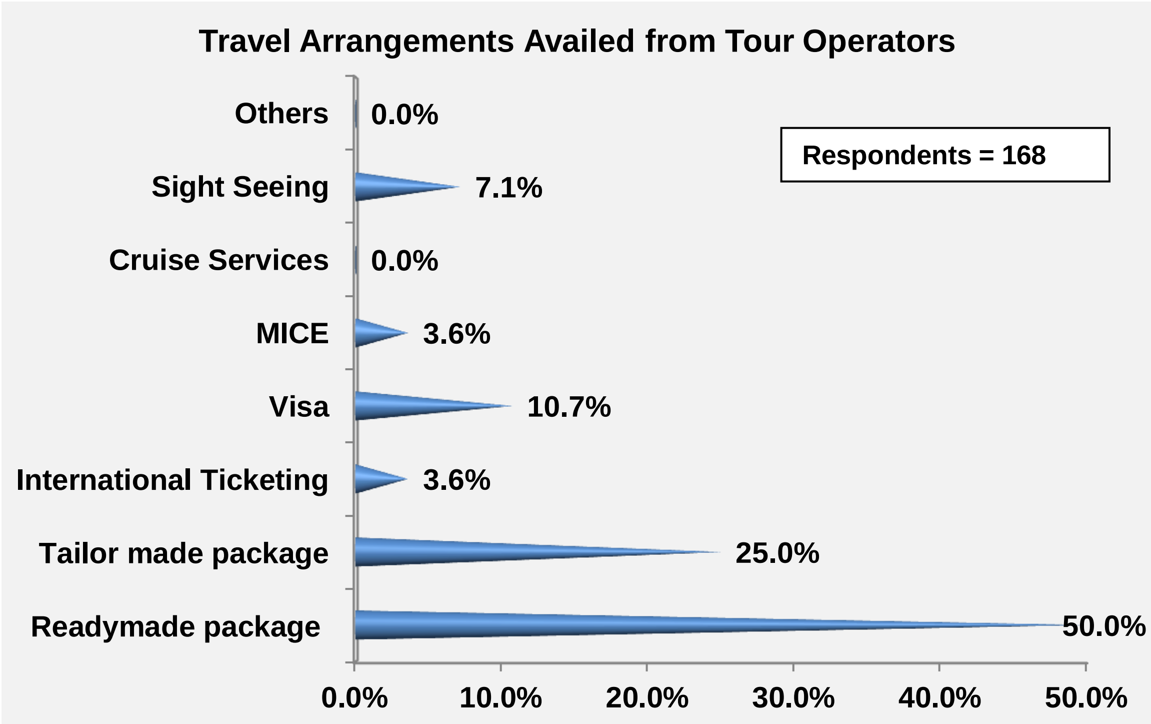
Figure 43: Selection Criteria of Tour Operators



3.1.4.16 Travel Arrangements Availed from Tour Operators

The 168 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. 50% of the total of 168 respondents mentioned that a readymade package was the arrangements availed from the tour operator.

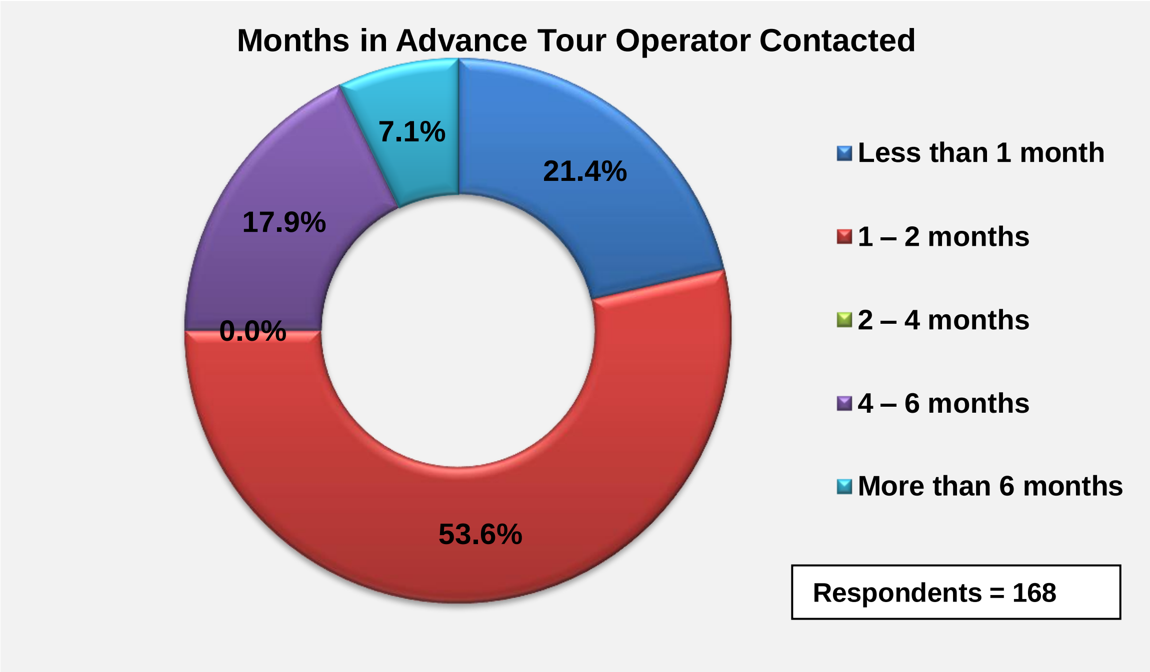
Figure 44: Travel Arrangements Availed from Tour Operators



3.1.4.17 Months before Contacted Tour Operator

The 168 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. 17.9% of the total of 168 respondents mentioned that they contacted the tour operator around 4 to 6 months in advance.

Figure 45: Months in Advance Tour Operators Contacted



3.1.4.18 Awareness of India as a tourist destination

About 29% of all 900 respondents who had visited other countries in the last one year were aware of India as a tourist destination.

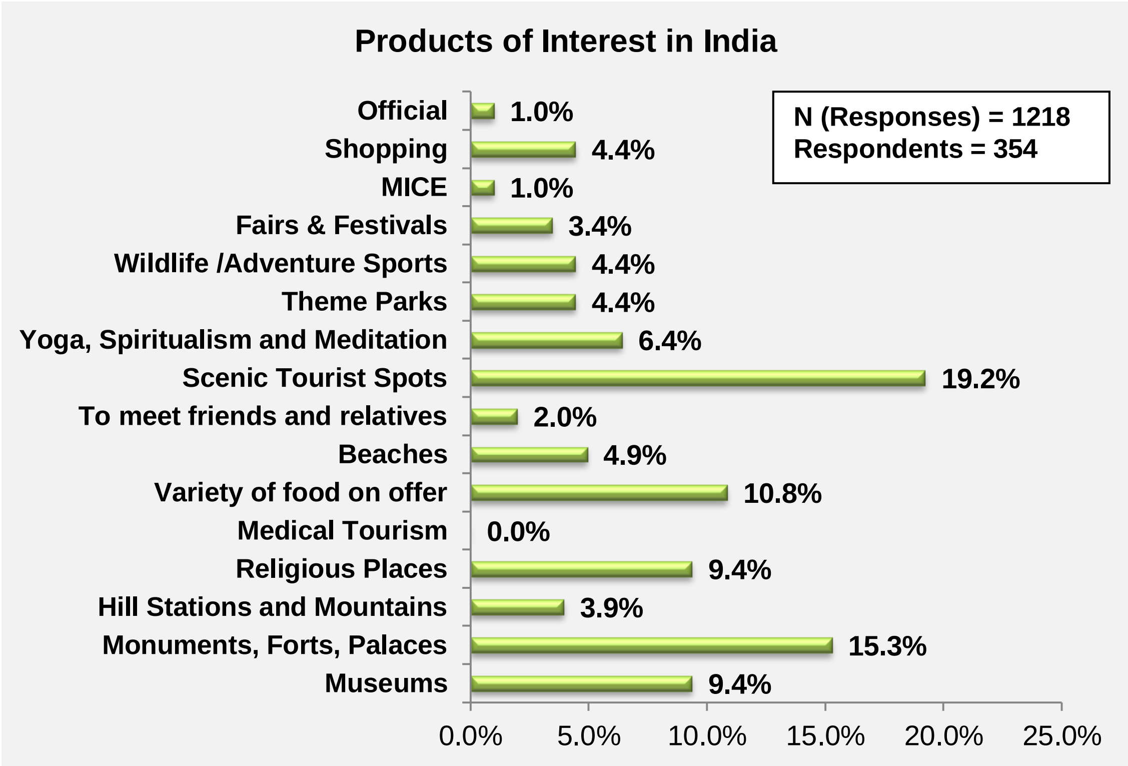
3.1.4.19 Intention of visiting India

Though 29% of the respondents (264 respondents) were aware of India as a tourist destination, only about 39.3% of the total 900 respondents expressed interest in visiting India during their next trip.

3.1.4.20 Primary attractions of India / motivation for visiting India

The 354 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). 1218 responses were received from 354 respondents in response to this question. Most respondents admitted that they found India attractive for its monuments, forts and palaces and scenic tourists spots (19.2% of 1218 responses each).

Figure 46: Products of Interest in India

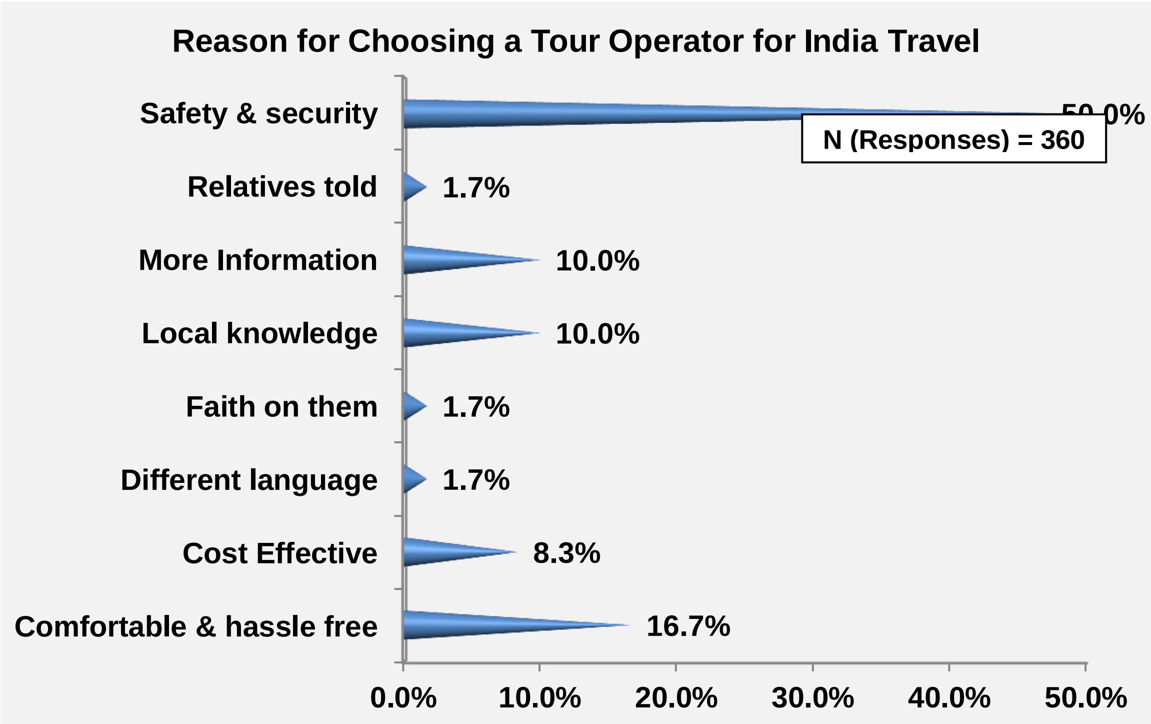


3.1.4.21 Intention and reason for choosing an intermediary for India travel

All the 900 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. 40% of the respondents showed inclination to consult a tour operator and 60% 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. 50% of responses showed that the travellers would like to approach tour operators for the safety and security they offer.

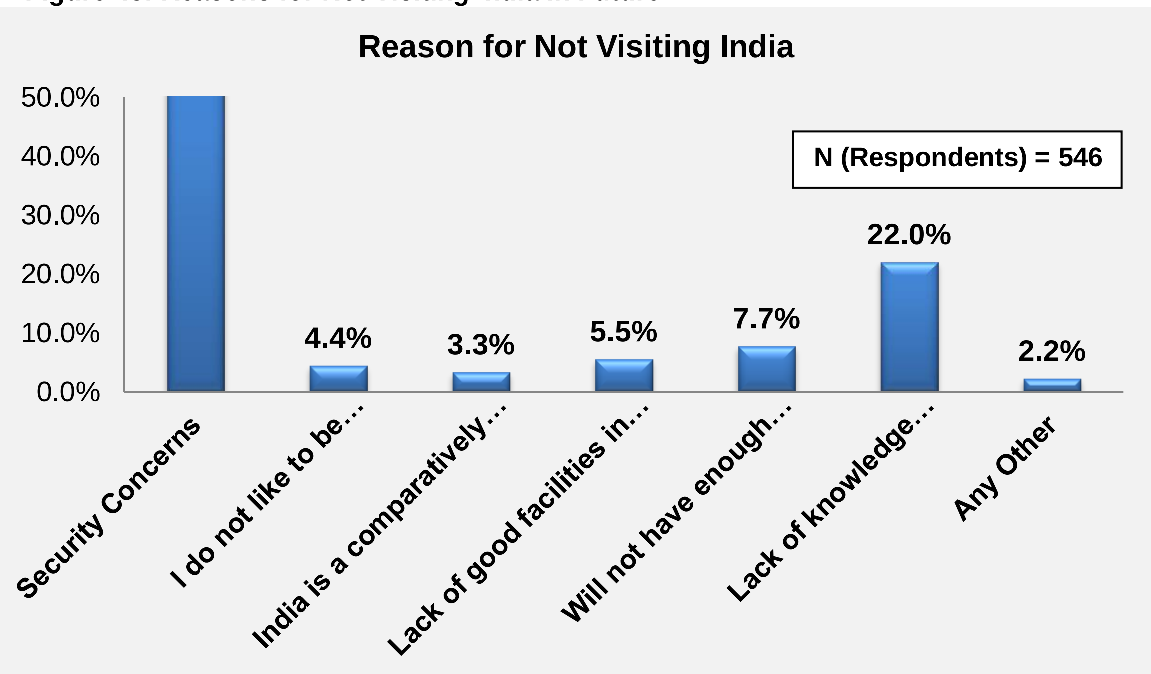
Figure 47: Reason for Approaching Tour Operators



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 (546 of 900 respondents), the primary concern that proved a dampener was security concerns in India (54.9% of the 546 responses received in this context).

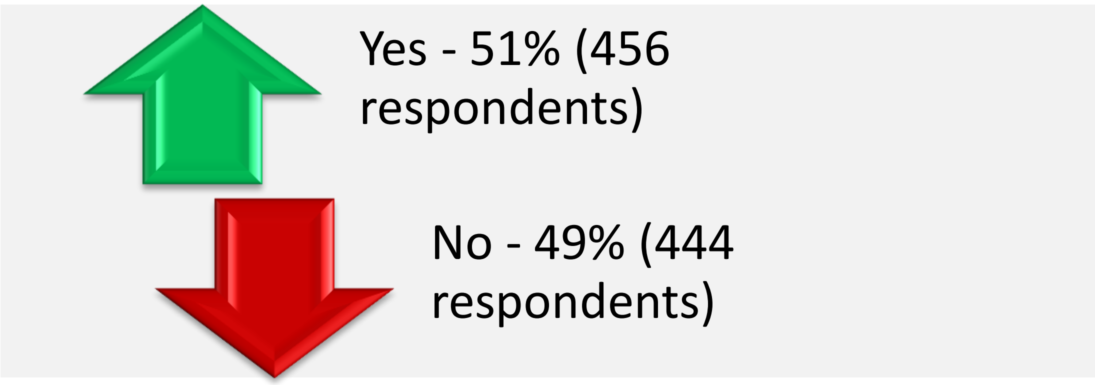
Figure 48: Reasons for Not Visiting India in Future



3.1.4.23 Visit India Ever

All 900 past travellers from South Korea to countries other than India were asked if they would ever visit India and 50.7% of the 900 respondents stated that they would visit India. 444 respondents out of 900 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 (31%) stayed in star category hotels whereas travellers who headed to other countries, only 19% stayed in star category hotels.

Table 16: Accommodation Availed by past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
18%	Resorts	17%
31%	Star Category Hotels	19%
26%	Mid-Range Hotels	46%
18%	Budget Hotels	13%
7%	Staying with Friends / Family	4%
0%	Others	1%

3.1.5.2 Package Expenses of Past Travellers

Travellers to India have incurred a lower average per capita package expense (**all costs in US$**) than those travelling to other countries.

Table 17: Package expenses of Past Travellers – India vs. Other Country

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
1164	Accommodation	1068
2081	International Travel	2196
636	Local Travel	717
549	Food including alcohol	608
504	Others	422
4737	Total	4975

3.1.5.3 Non-Package Expenses of Past Travellers

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

Table 18: Non-Package Expenses of Past Travellers – India vs. Other Country

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
1393	Accommodation	1262
1980	International Travel	2148
646	Local Travel	661
551	Food including alcohol	615
524	Others	552
4575	Total	5238

3.1.5.4 Preferred Mode of Payment of Past Travellers

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

Table 19: 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	2
3	Debit Card	3

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 good followed by excellent.

Table 20: Trip Satisfaction of past Travellers – India vs. Other Country

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
14%	Excellent	33%
44%	Good	39%
29%	Satisfactory	25%
13%	Poor	2%
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 21: Mode of Trip Booking of Past travellers – India vs. Other Country

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
46%	Self (Internet)	76%
11%	Self (Counter)	5%
43%	Travel Operator /Agent	19%

3.1.5.7 Source of Booking Information for Past Travellers

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

Table 22: Source of Booking Information for Past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
25%	Travel Portals	24%
11%	Books	17%
24%	Websites / Internet	36%
11%	Brochures on Country	5%
9%	Country Tourism office in my own country	15%
14%	Friends / Relatives	3%
6%	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 (56% of respondents and 68% of respondents for India and Other countries respectively) did their bookings through tour operators based in their own country.

Table 23: 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	21%
56%	Tour operator that	68%

	operates in my own country	
12%	**Tour operator in India**	**11%**
4%	**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 (35%) sought readymade packages from tour operators whereas travellers who headed to other countries, 50% of them sought readymade packages as travel arrangements from tour operators.

Table 24: Type of Travel Arrangements Used by Past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
35%	**Readymade package**	50%
29%	**Tailor made package**	25%
9%	**International Ticketing**	4%
9%	**Visa**	11%
0%	**MICE (Meeting, Incentives, Conventions, Exhibitions)**	4%
0%	**Cruise Services**	0%
17%	**Sight Seeing**	7%
0%	**Others**	0%

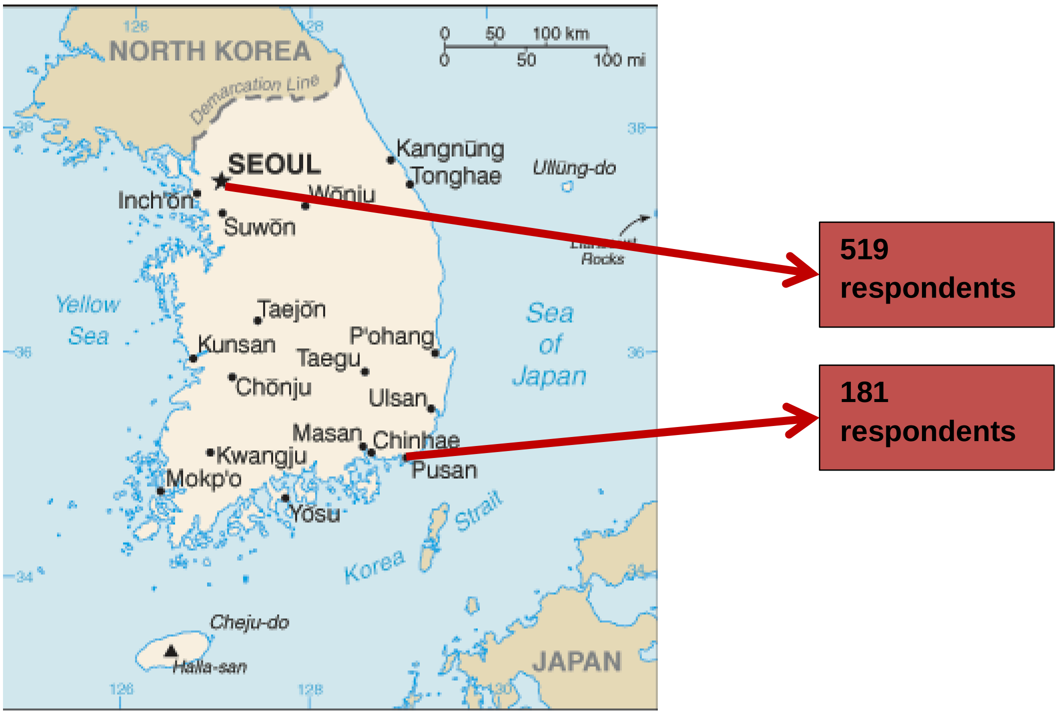
4.1 Prospective Outbound Travel Behavior

4.1.1 Profiling Information

4.1.1.1 Place of residence

The survey investigated 700 respondents (persons who are intending to travel abroad) from South Korea of which 25.9% of the travellers were from Busan and 74.1% from Seoul.

Figure 50: Distribution of Past Travellers by Place of Residence



Map Source: famouswonders.com

4.1.1.2 Gender Distribution

Women constituted only 19% of the total 700 survey participants of intending travellers from South Korea. Overall, 130 prospective female travellers were interviewed during the primary survey across the 2 cities.

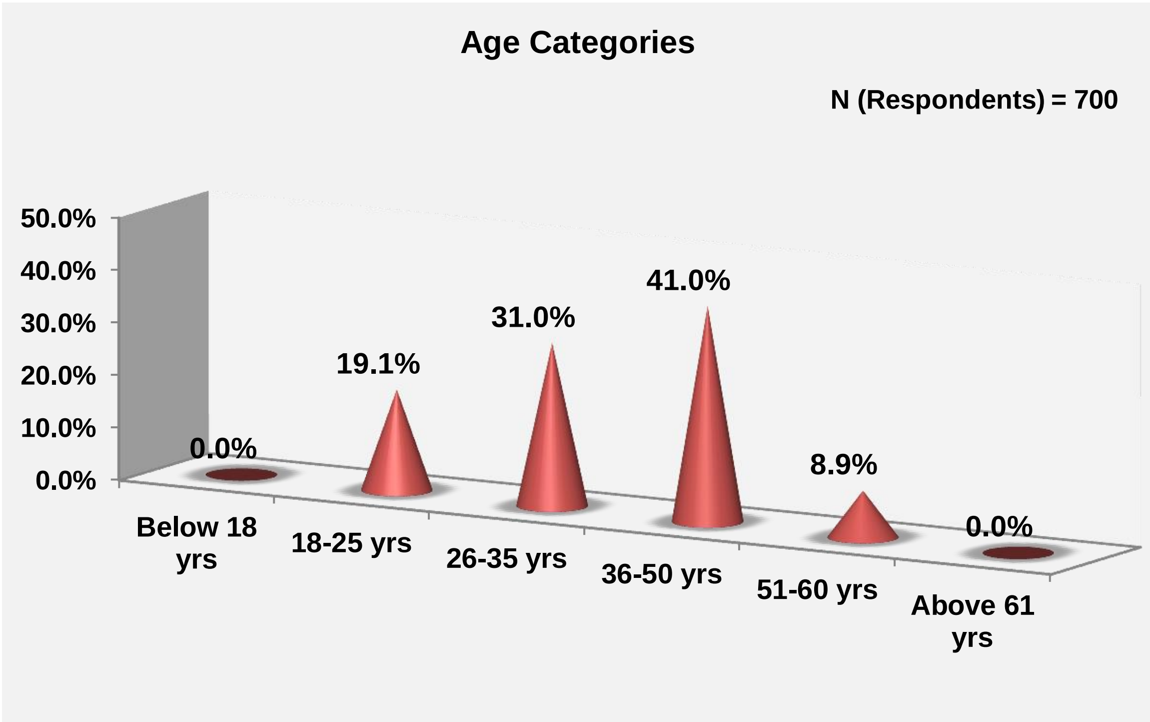
Table 25 Respondents by gender

Gender	No. of respondents	Percentage
Male	570	81.4%
Female	130	18.6%
Total	**700**	**100.00%**

4.1.1.3 Age categories

31% of the respondents were between 26 to 35 years of age. 41% of the respondents were in the age group of 36 to 50 years. Overall, 91% of the respondents were in their peak productive years between 18 and 50 years of age.

Figure 51: Age Categories



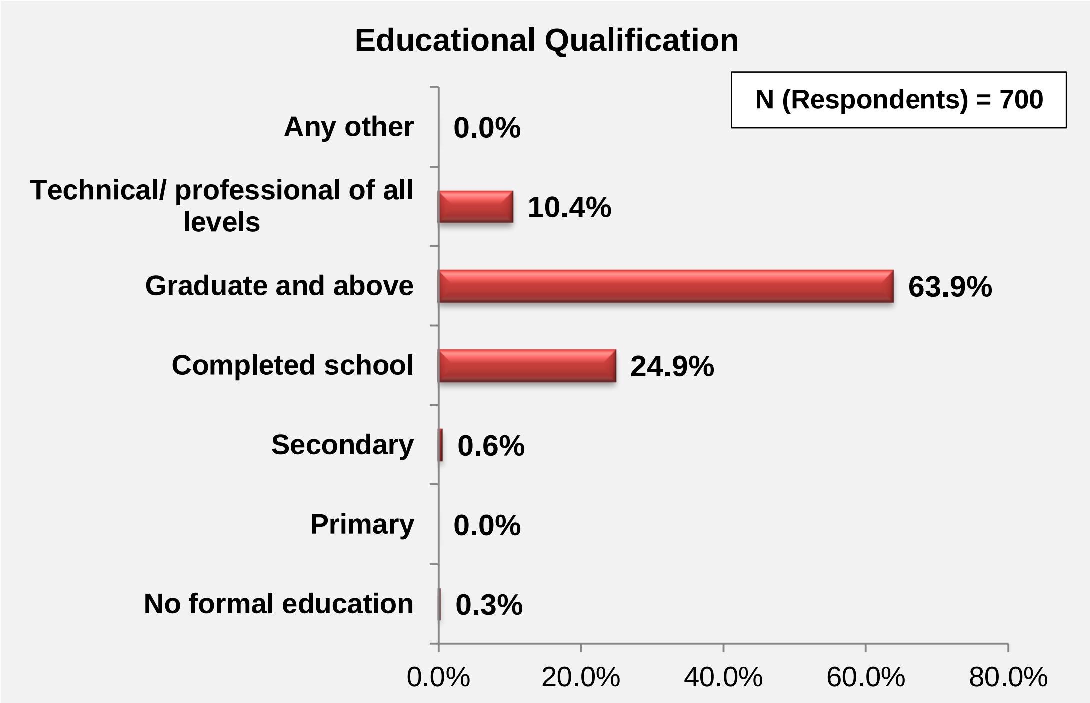
4.1.1.4 Employment status

99% of the 700 respondents were employed full time.

4.1.1.5 Educational Qualifications

About 64% of the 700 respondents were at least graduates or had some technical or professional qualification. Less than 25% of the respondents had completed Higher Secondary schooling. So overall, the respondent universe was well-educated and aware.

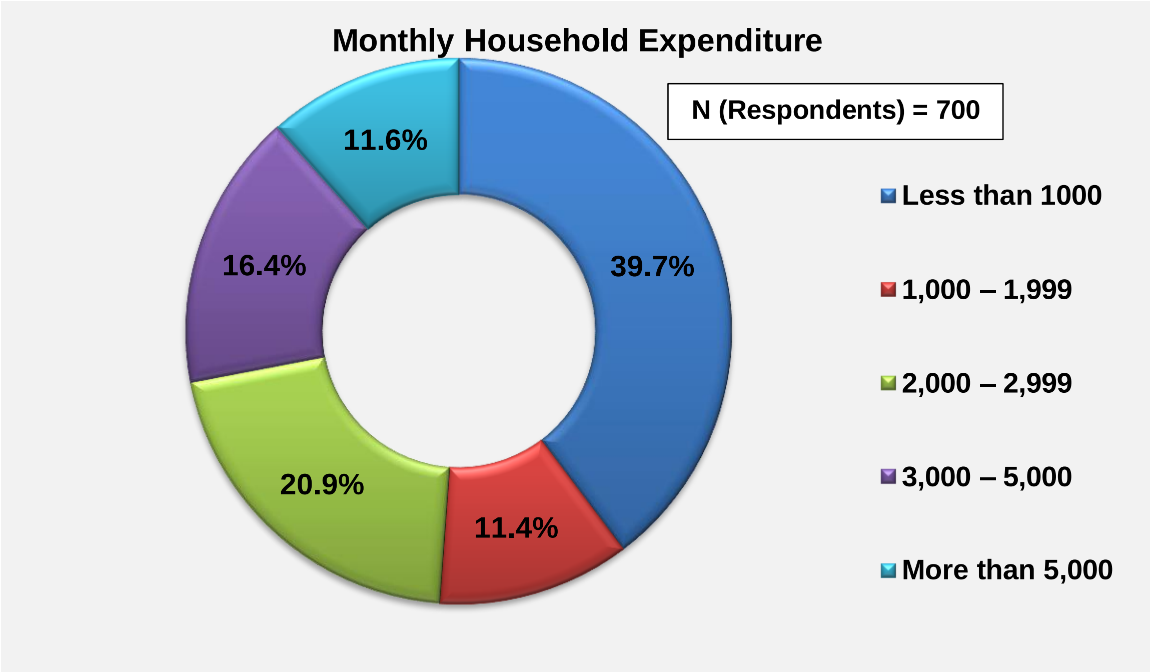
Figure 52: Educational Qualification



4.1.1.6 Household Expenditure per month

11.6% of the respondents mentioned that their monthly household expenditure was more than USD 5000.

Figure 53: Monthly Household Expenditure

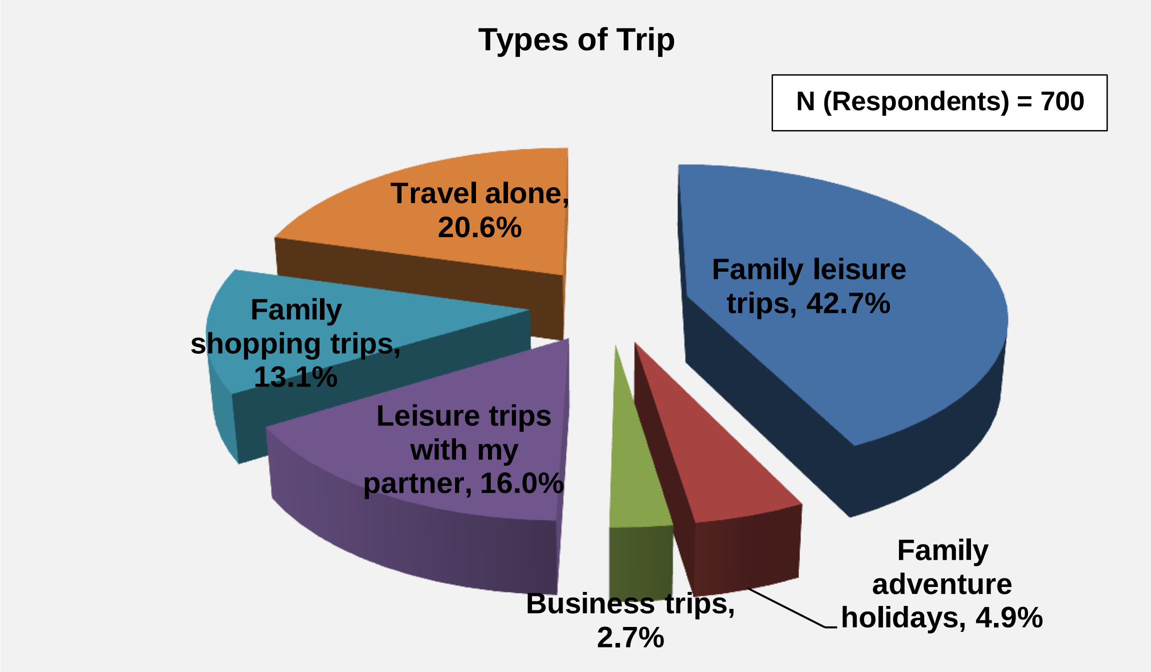


4.1.2 General Travel Behaviour

4.1.2.1 Types of trip

Majority of the respondents wish to primarily go on family leisure trips and family adventure holidays. A considerable section also intends to go for solo trips (20.6% of 700 respondents) and leisure trip with spouse or partner (112 of 700 respondents).

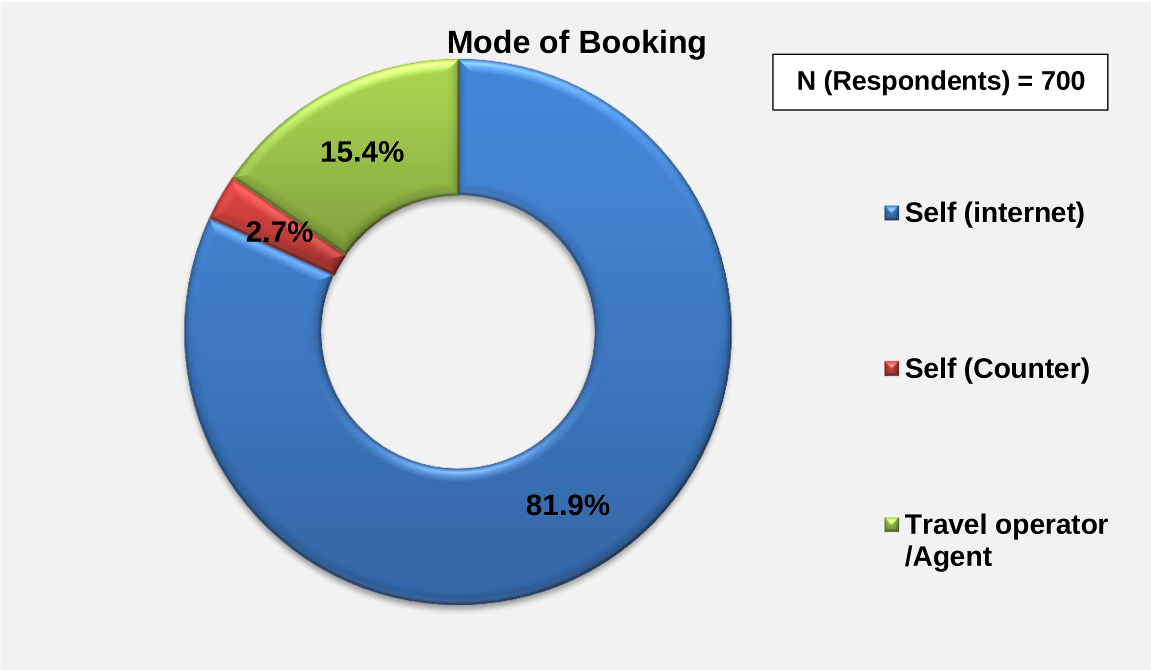
Figure 54: Respondents by purpose of travel



4.1.2.2 Mode of booking

81.9% of 700 respondents mentioned that they would book their tickets over the internet while 15.4% (108 of 700) expressed the intention of approaching travel agents. 19 of the 700 respondents said that they would book their tickets themselves at the counter.

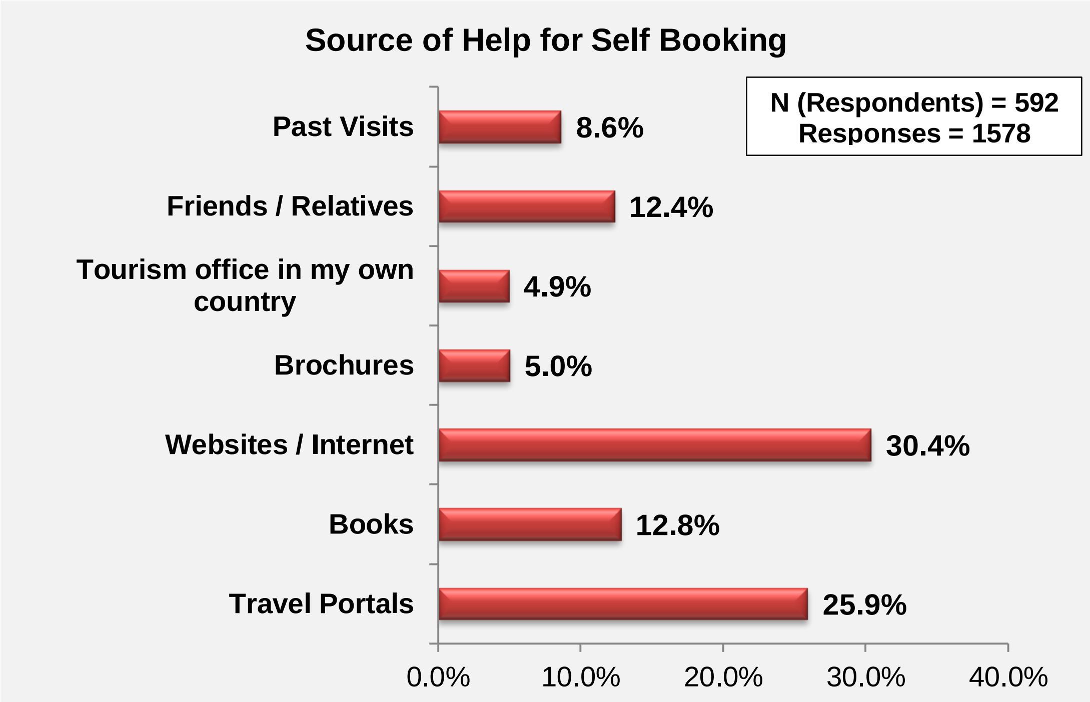
Figure 55: Mode of Booking



4.1.2.3 Sources of help for booking information

The 592 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). 30.4% of the 1578 responses received revealed that the internet was a very important source of information for travellers as well as a powerful tool for sorting out travel modalities. 12.4% responses showed that on occasion friends and relatives could also be consulted.

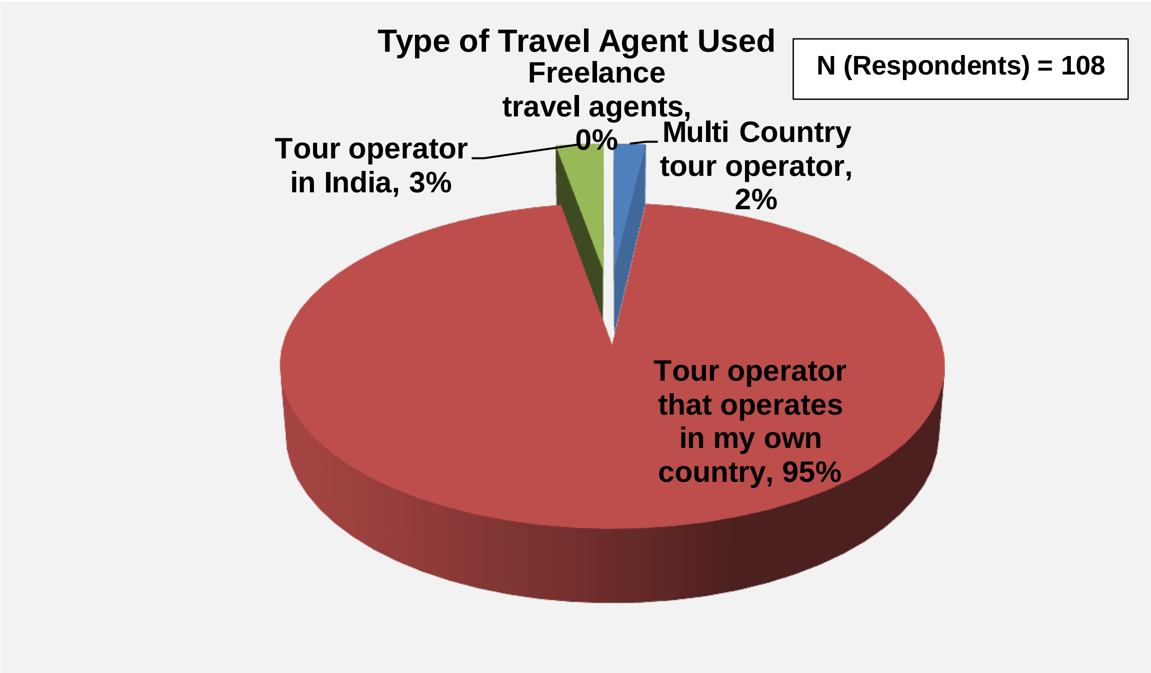
Figure 56: Sources of booking information



4.1.2.4 Type of tour operator used

Among those intending to approach tour operators for ticketing assistance, 95% said that they would approach operators from the South Korea. Another 2% were willing to approach multi-country operators. Only 3% mentioned that they would approach tour operators from India.

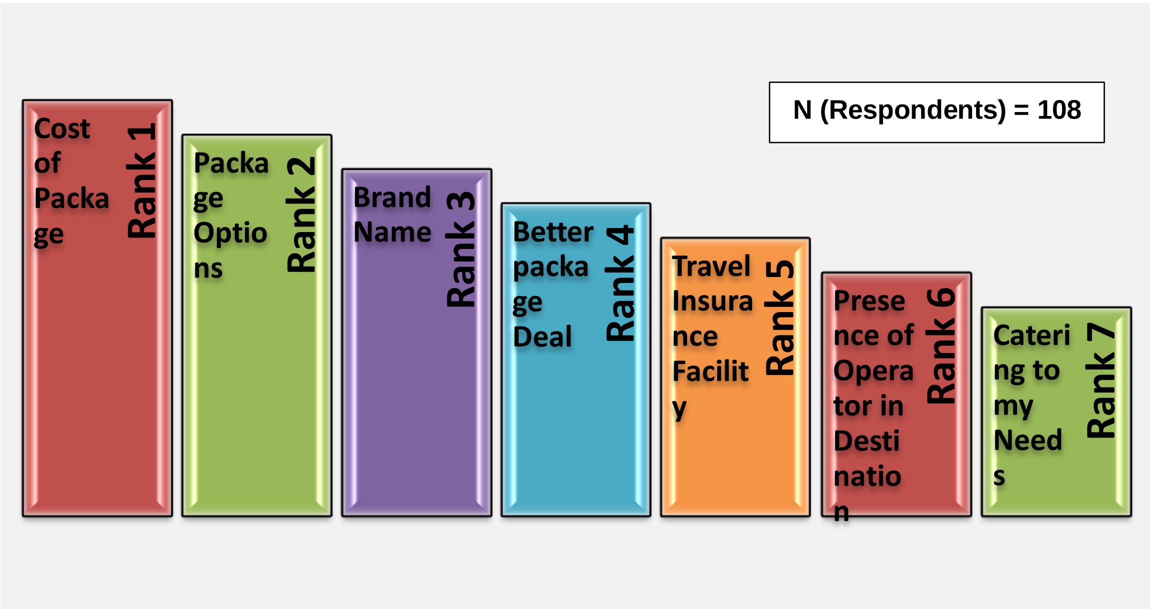
Figure 57: Type of Travel Agent Used



4.1.2.5 Tour operators selection criteria

For these 108 respondents, the cost of package was an important decision point in selecting the tour operator. This was followed by the package options.

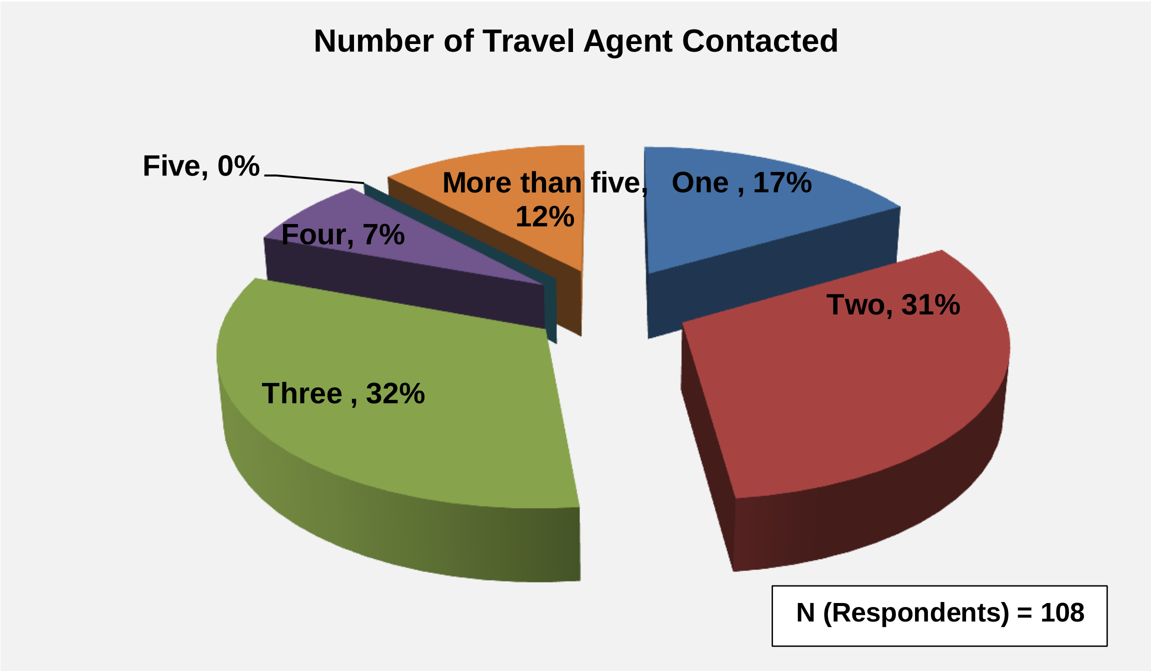
Figure 58: Tour Operator Selection Criteria



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

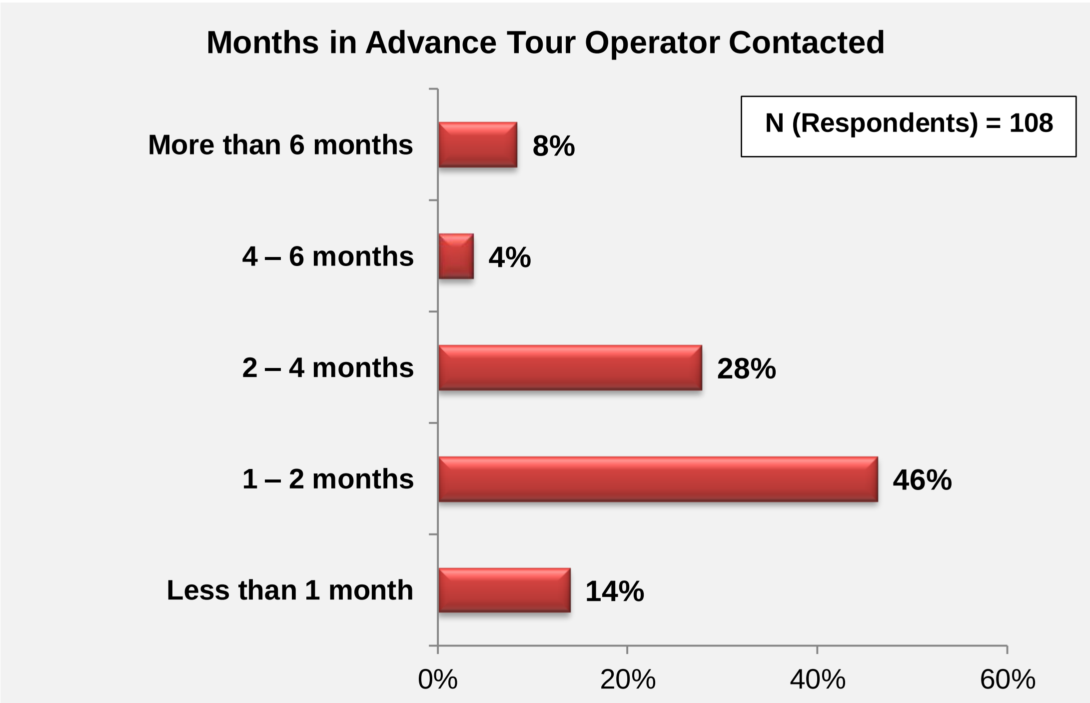
Of the 108 respondents who mentioned that they would approach tour operators, 32% said that they would contact at least 3 operators before reaching a decision.

Figure 59: No. of tour operators the respondents intended to contact before coming to a decision



46% respondents mentioned that they would contact the travel operator at 1 to 2 months in advance. 4% respondents displayed intention of connecting with the tour operator 4 to 6 months in advance.

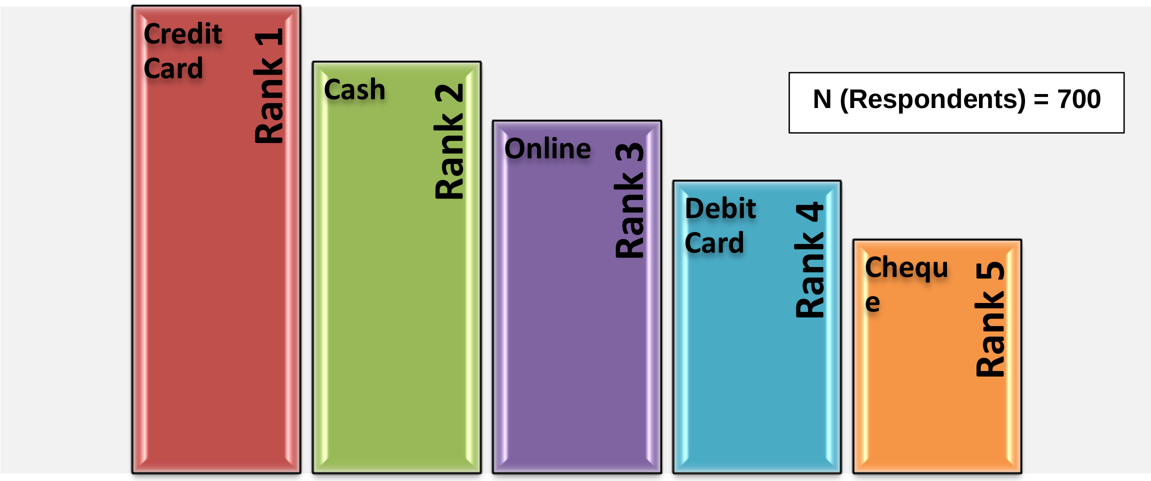
Figure 60: Months in Advance Tour Operator Contacted



4.1.2.7 Mode of payment preferred

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

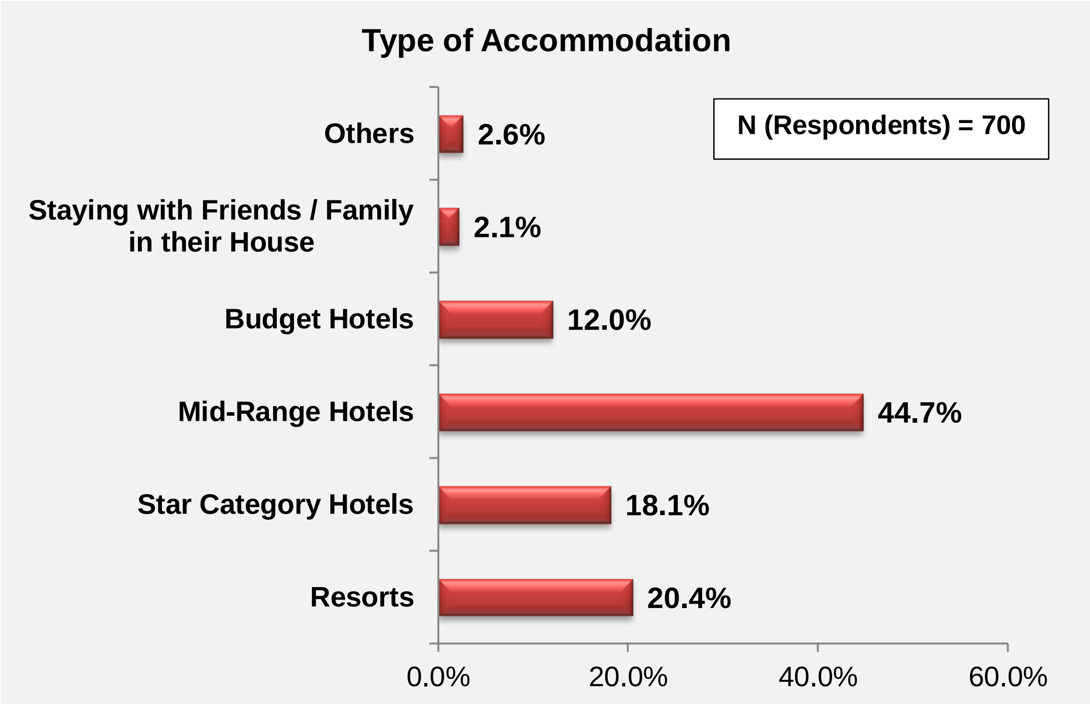
Figure 61: Mode of Payment Preferred



4.1.2.8 Type of accommodation to be availed

The 700 prospective travellers were questioned about the type of accommodation that they would prefer during their trip. About 20.4% prospective travellers were willing to look at resorts rather than star category hotels (127 of 700 respondents chose starred hotels) while 44.7% stated that mid-range hotels would be their preferred accommodation.

Figure 62: Respondents by type of accommodation

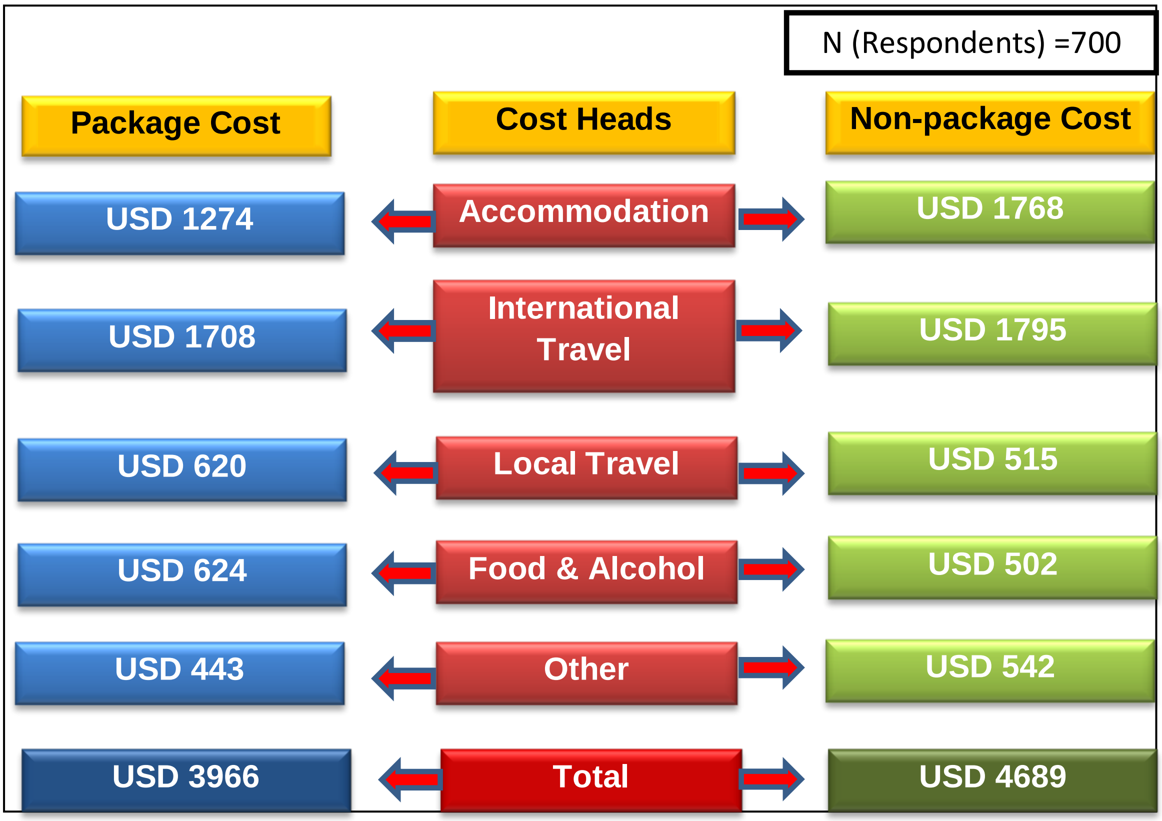


Note: Star category hotels: Hotels with more than 4 stars; Mid-ranged hotels: Hotels of 3 stars rating; Budget hotels: Hotels with 1-2 stars rating.

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 appropriately 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.

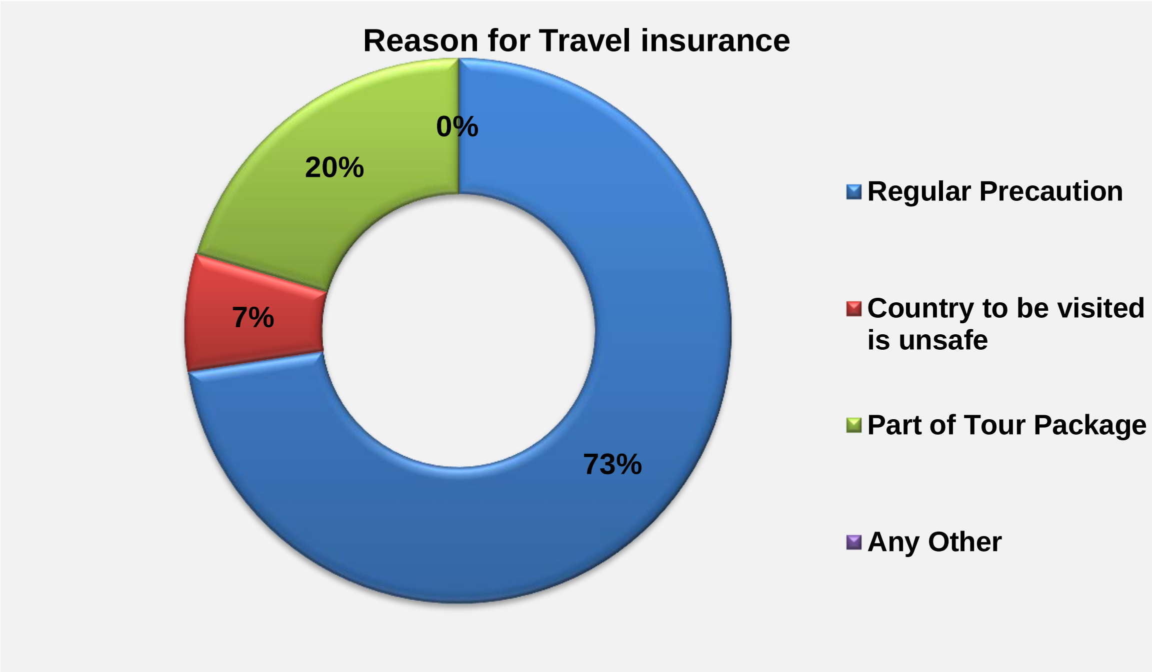
Figure 63: Expenditure across cost baskets



4.1.2.10 Reason for availing travel insurance if any

74% of prospective travellers (700 respondents) wished to opt for travel insurance. Majority (73%) said that this was part of regular precaution they took while travelling.

Figure 64: Reason for Opting of Travel Insurance


Reason for Travel insurance
0%
20%
7%
73%
Regular Precaution
Country to be visited is unsafe
Part of Tour Package
Any Other

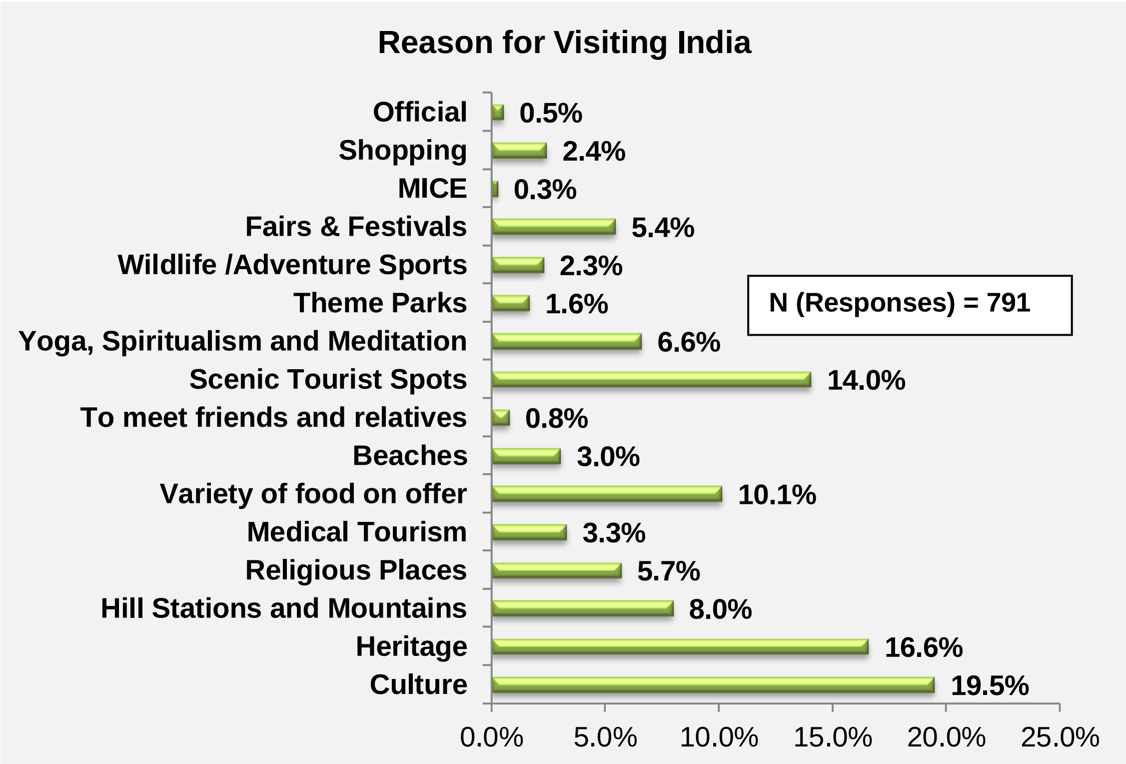
4.1.3 Travel Behaviour of Prospective Visitors to India

Of the 700 prospective travellers interviewed, 200 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 791 responses were received from the 200 respondents of which 19.5% responses indicated the desire to see the culture of India as the driving reason.

Figure 65: Reason for choosing India for next trip



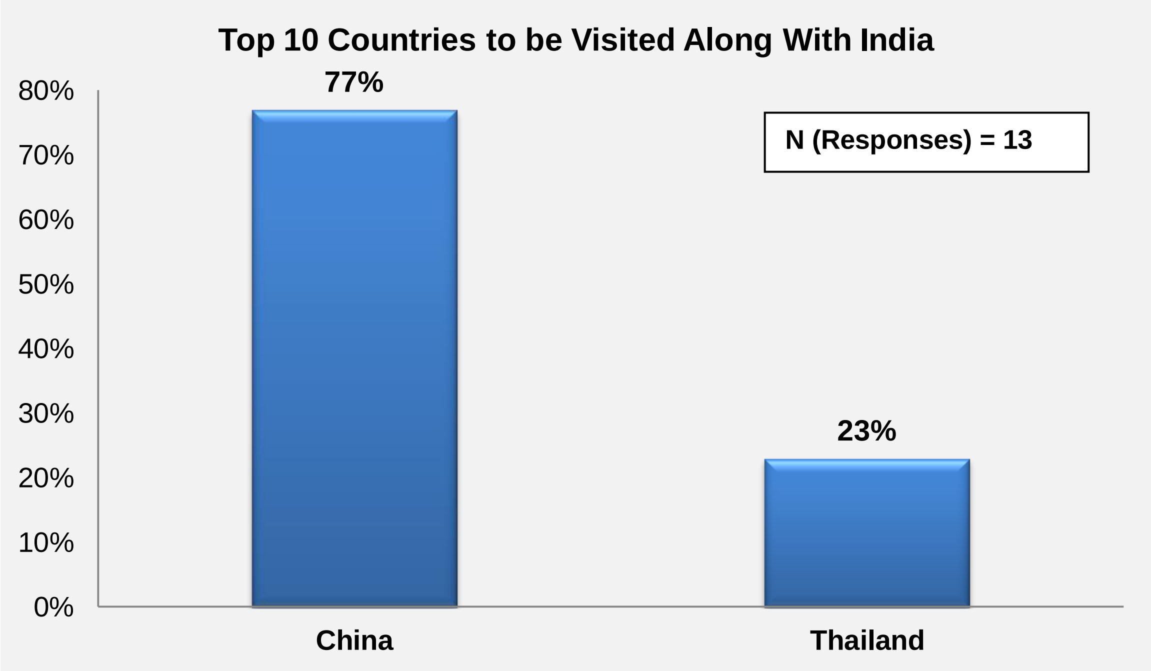
4.1.3.2 Intention of visiting only India or as part of a sub-regional trip

94% of these 200 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

77% of these 13 respondents intended to visit India as part of a regional tour to South Asia mentioned China in their schedule.

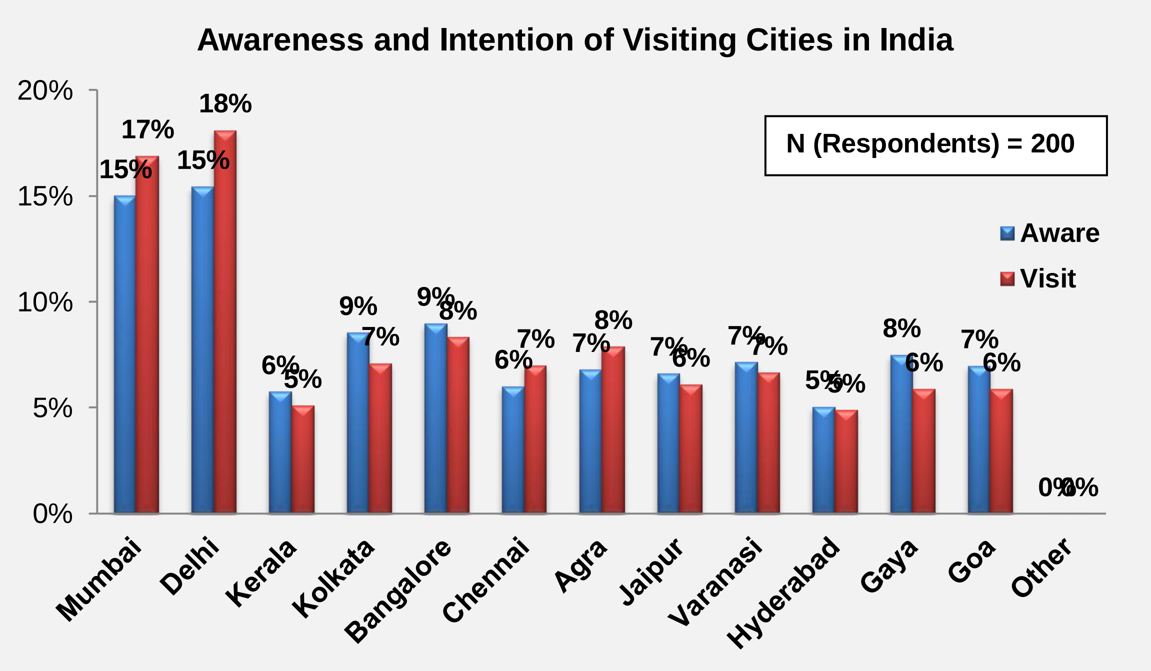
Figure 66: Top 10 Countries to be Visited along with India



4.1.3.4 Awareness and intention of visiting destinations in India

The 200 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 Bangalore. Examination of the responses shows 18% of the persons wanted to visit Delhi while 17% wanted to visit Mumbai.

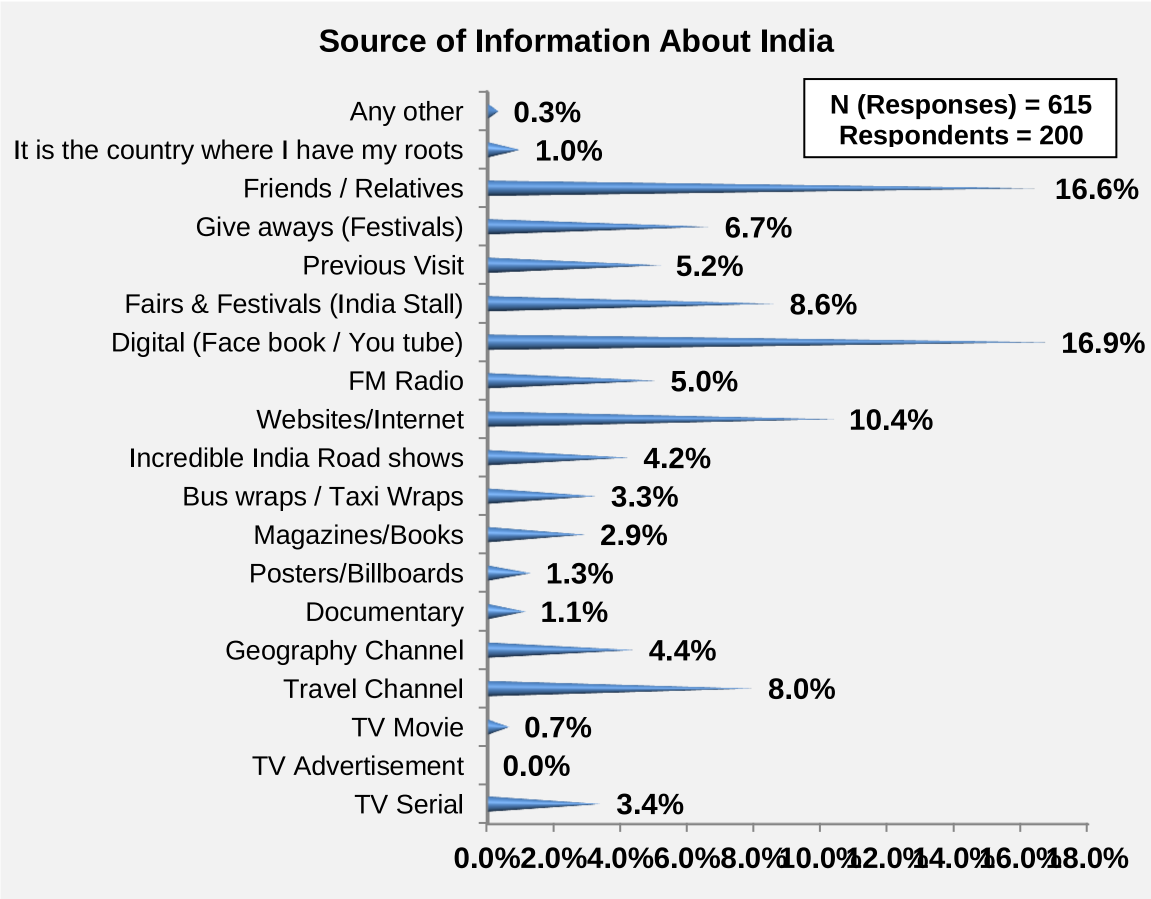
Figure 67: Awareness about a destination and its traction for the visitor



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 social media and friends and relatives; about 16% of responses received for each indicated this. 8% of all responses indicated that travel channels were an important source of information.

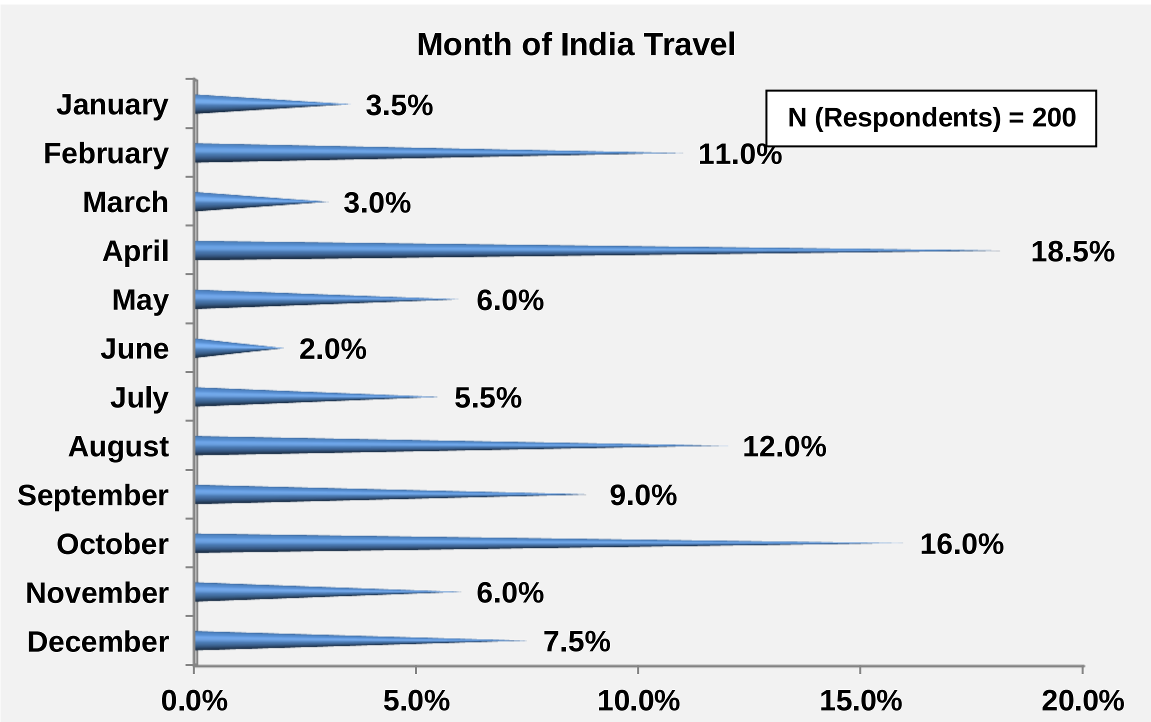
Figure 68: Sources of information about India



4.1.3.6 Time of visit to India

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

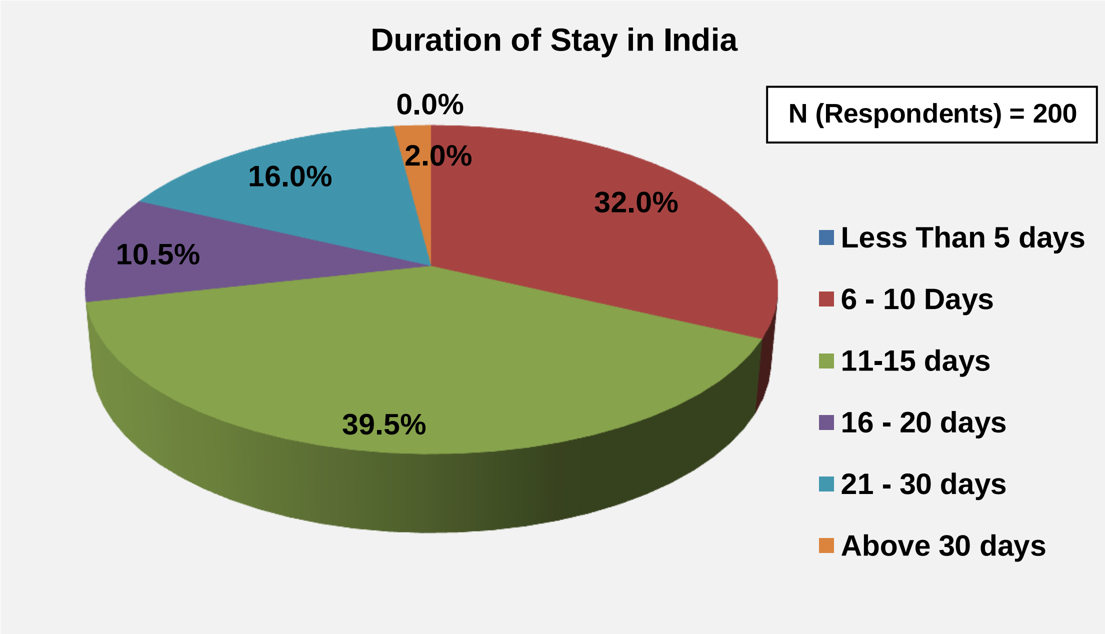
Figure 69: Preferred month for potential visit to India



4.1.3.7 Duration of stay

39.5% of the 200 respondents intend to stay for a period of 11 to 15 days in India. 32% intended to stay for 6 to 10 days.

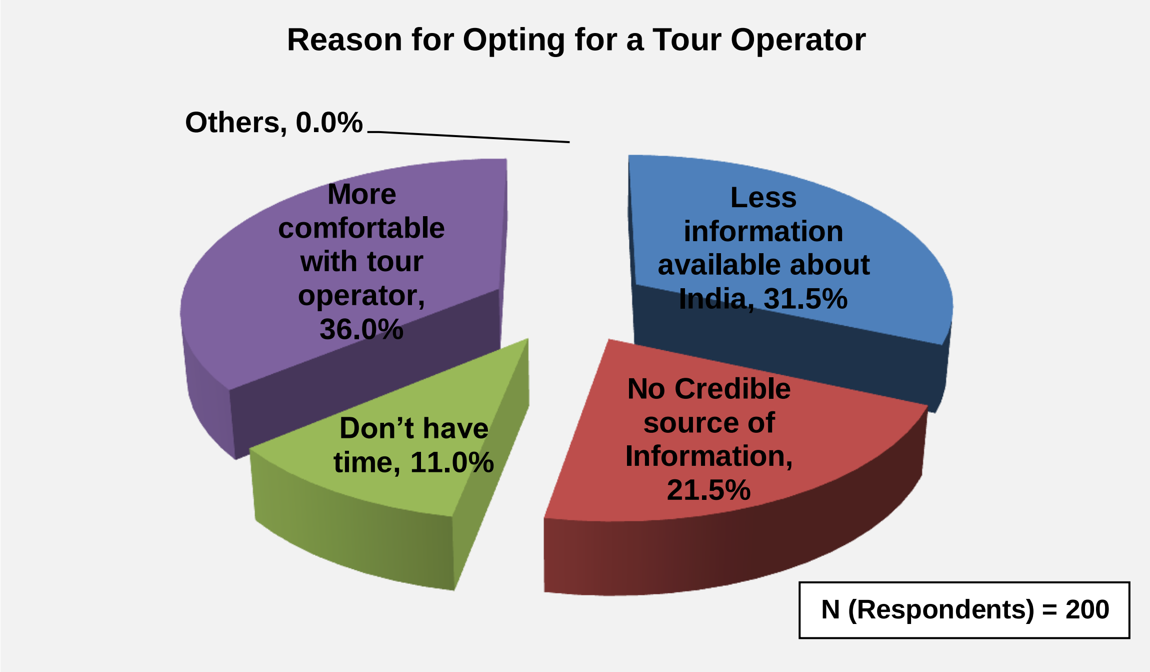
Figure 70: Duration of Stay in India



4.1.3.8 Reason for booking through a tour operator while visiting India

From the 200 respondents who planned to come to India in their next visit, 36% of the respondents mentioned they were more comfortable with tour operator for their India trip.

Figure 71: Reason for Opting for a Tour Operator



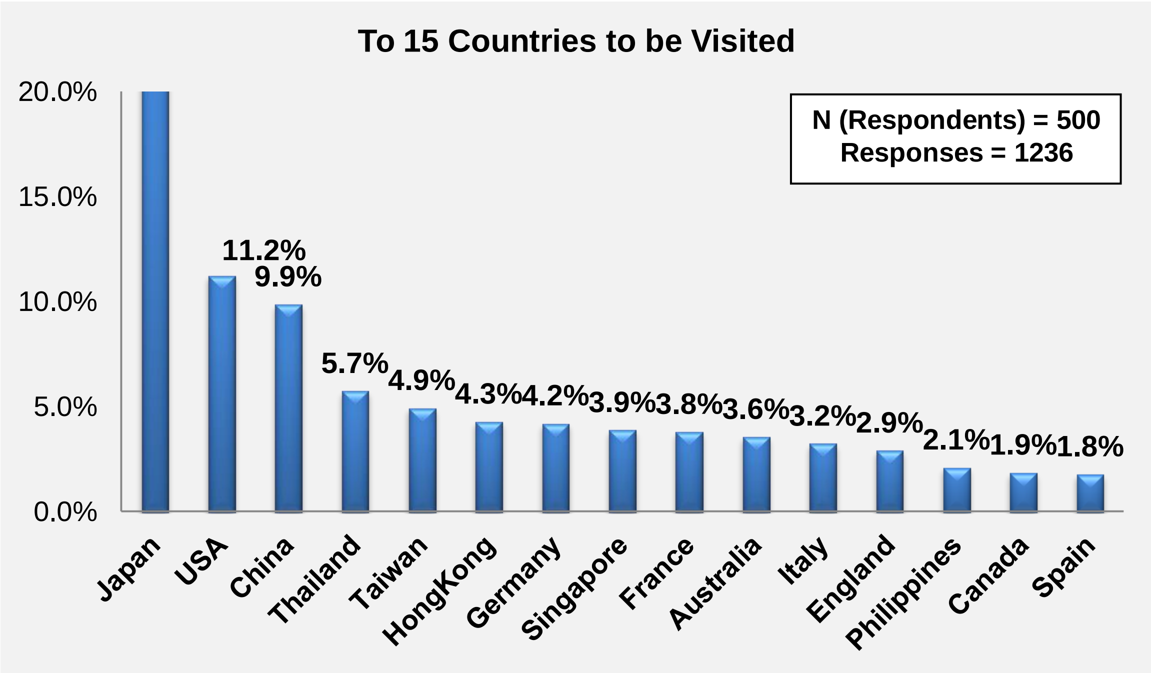
4.1.4 Travel Behaviour of Prospective Visitors to Other Countries

Of the 700 prospective travellers interviewed, 500 expressed the intention of visiting countries other than India in the near future.

4.1.4.1 Countries to visit

Among these 500 respondents, top favoured destinations were Japan, USA, China, Thailand, and Taiwan.

Figure 72: Favored destinations for those intending to travel to countries other than India



4.1.4.2 Drivers / reasons for visiting foreign locales

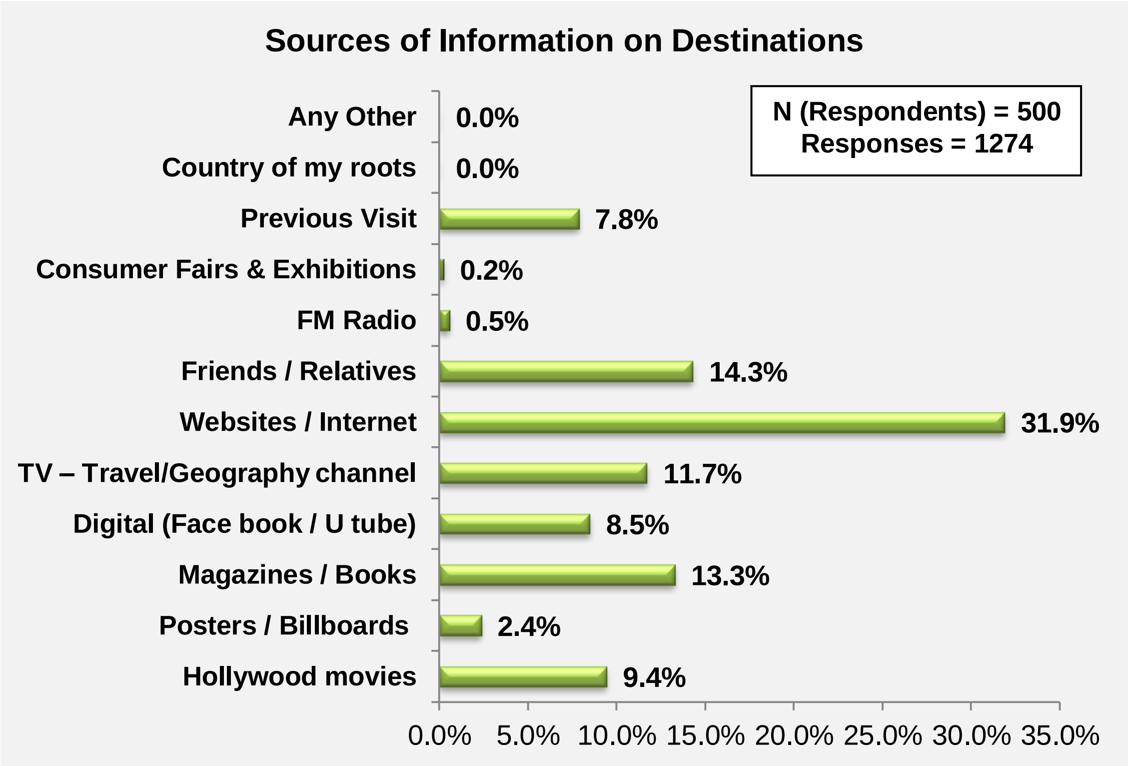
Respondents were asked the main reasons why they intended to travel overseas in the near future. The top most reason for travel was cited as leisure/recreation (79.2% respondents of 500). The other important driver was business (7.4% of 500 respondents).

Figure 73: 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. 1274 responses were yielded by 500 respondents. Important sources of information regarding destination countries are internet followed by friends & relatives— 31.9% and 14.3% of responses respectively.

Figure 74: Sources of information about destination countries



4.1.4.4 Awareness of India as a tourist destination

Only 6.4% of 500 respondents were aware of India as a potential destination before they took their decision to head elsewhere.

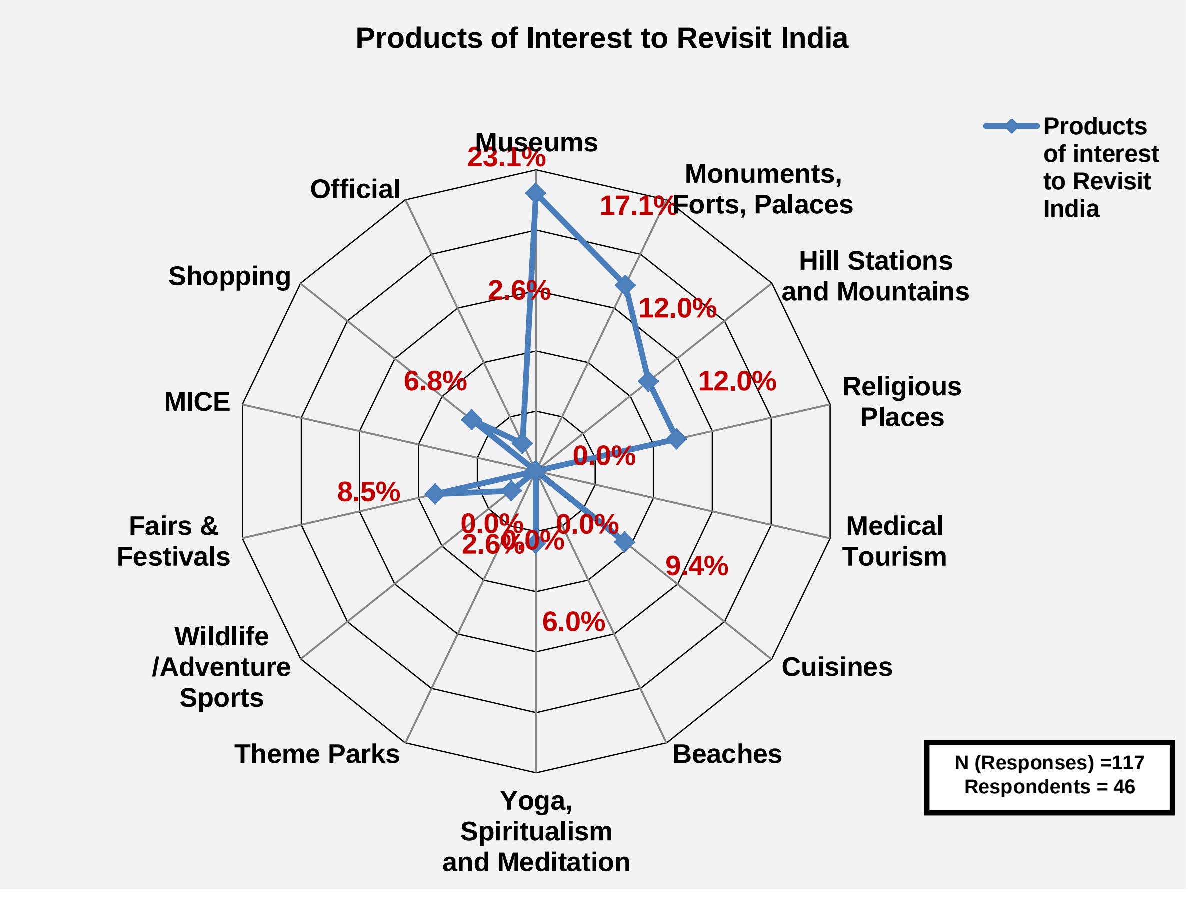
4.1.4.5 Intention of visiting India

About 9.2% of the 500 respondents expressed their intention to visit India next time. 454 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 46 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 117 responses as multiple options were permitted. They evinced interest in India's museums as the most attractive motivation (23.1% of responses).

Figure 75: Primary attractions in India

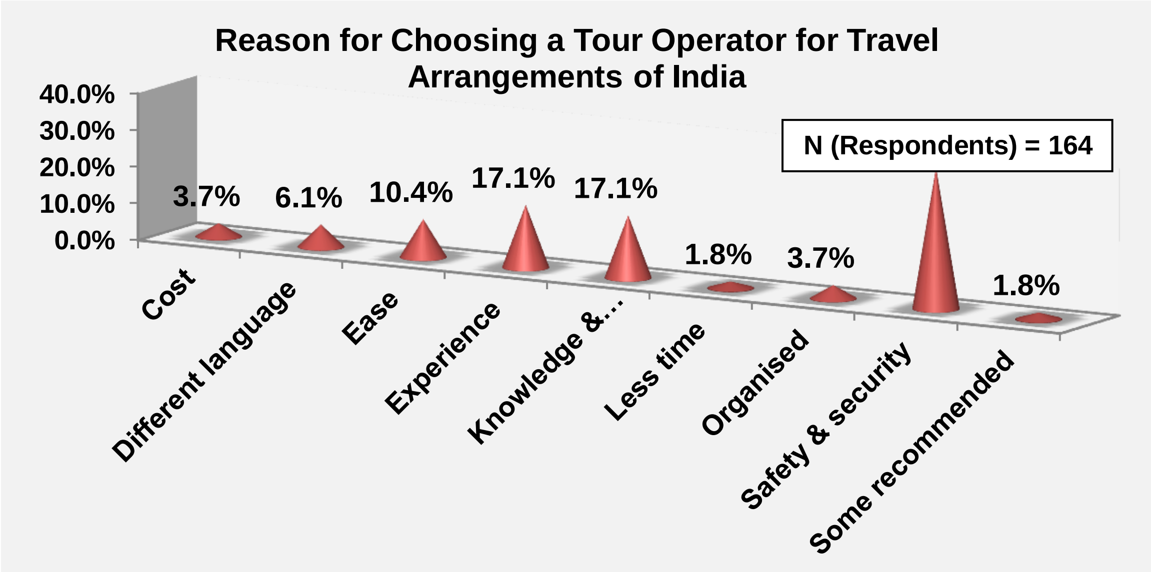


4.1.4.7 Intention and reason for choosing an intermediary for India travel

67.2% of the total 500 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 500 respondents, 164 persons expressed their intention of hiring a tour operator.

38.4% felt that the intermediary would provide better safety and security in India.

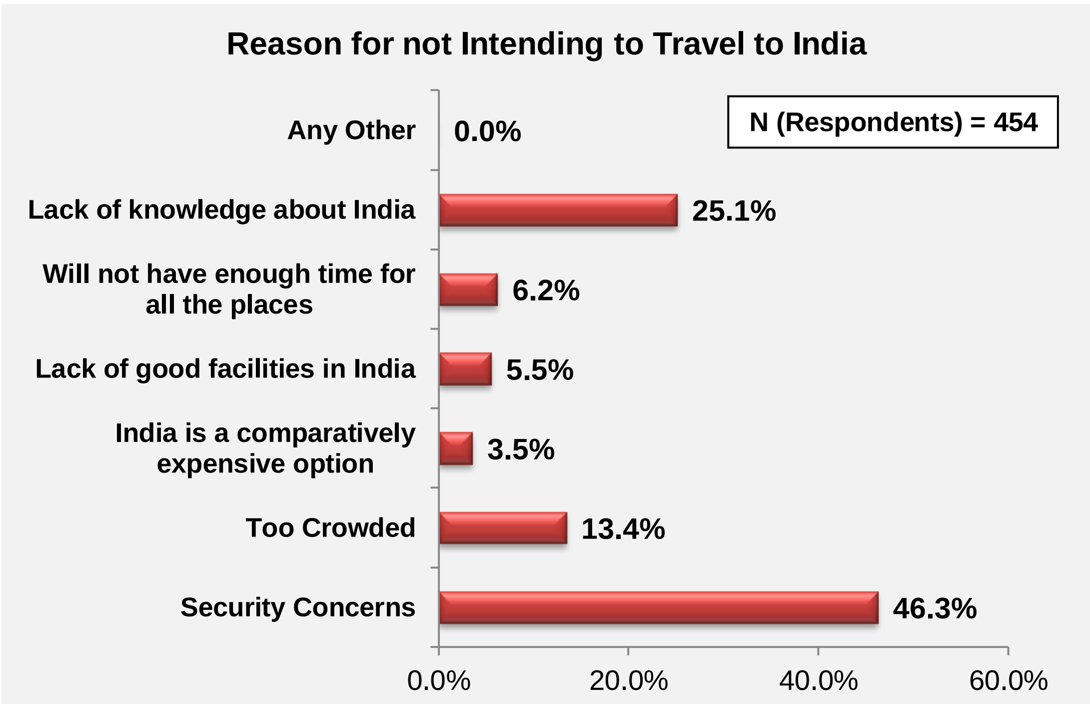
Figure 76: Reason for Choosing a Tour Operator for Travel Arrangements in India



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

The 454 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 (46.3% respondents).

Figure 77: Reasons for not intending to travel to India



But 64% 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 headed to India, a large percentage (24.5%) stayed in star hotels whereas travellers who headed to other countries, only 15.6% stayed in mid-range hotels.

Table 26: Accommodation Availed by Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
24.5%	Resorts	18.8%
24.5%	Star Category Hotels	15.6%
36.0%	Mid-Range Hotels	48.2%
12.5%	Budget Hotels	11.8%
2.5%	Staying with Friends / Family	2.0%
0.0%	Others	3.6%

4.1.5.2 Package Expenses of Intending Travellers

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

Table 27: Package expenses of Intending Travellers – India vs. Other Country

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
1326	Accommodation	1247
1731	International Travel	1695
629	Local Travel	615
597	Food including alcohol	638
429	Others	452
4329	Total	3789

4.1.5.3 Non-Package Expenses of Intending Travellers

Travellers to India have incurred a little lower overall average per capita non-package expense (**all costs in US$**) than those travelling to countries other than India.

Table 28: Non-Package Expenses of Intending Travellers – India vs. Other Country

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
1713	Accommodation	1789
1743	International Travel	1817
515	Local Travel	515
549	Food including alcohol	484
511	Others	555
4640	Total	4708

4.1.5.4 Preferred Mode of Payment of Intending Travellers

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

Table 29: Preferred Mode of Payment of Intending Travellers – India vs. Other Country

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

4.1.5.5 Mode of Trip Booking of Intending Travellers

For both prospective 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 30: Mode of Trip Booking of Intending travellers – India vs. Other Country

Intending Travellers to India	Payment Mode Categories	Intending Travellers to Other Countries
90%	Self (Internet)	79%
2%	Self (Counter)	3%

8%	Travel Operator /Agent	18%

4.1.5.6 Source of Booking Information for Intending Travellers

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

Table 31: Source of Booking Information for Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
23%	Travel Portals	28%
15%	Books	11%
24%	Websites / Internet	35%
9%	Brochures on Country	2%
8%	Country Tourism office in my own country	3%
12%	Friends / Relatives	13%
9%	Past Visits	9%

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 (88% and 97% of respondents for India and Other countries respectively) did their bookings through tour operators based in their own country.

Table 32: Type of Travel Agent Used by Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
13%	Multi Country tour operator	0%
88%	Tour operator that operates in my own country	97%
0%	Tour operator in India	3%
0%	Freelance travel agents	0%

Chapter Five

India Tourism Office Findings

5.1 India Tourism Office

5.1.1 India Tourism Activity Response of Past Travellers

The survey had specific focus on the impact of the promotional activities of India Tourism Office. However there is no office of the India Tourism in South Korea. The Japan office of the Indian Tourism looks after South Korea. Hence evaluation of India Tourism Office is not presented for the country of South Korea.

Chapter Six

Future Outbound travel Projections

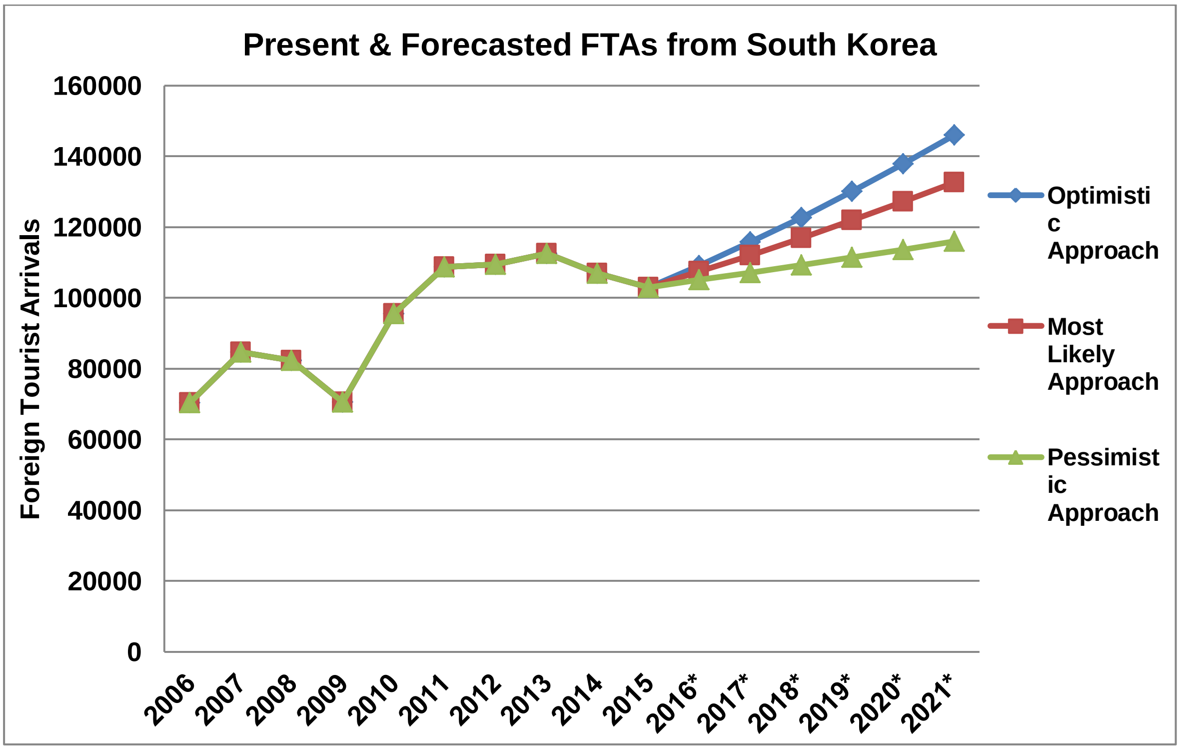
6.1 Projections for Future Outbound Travel

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 4.3% 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 6%. "***Pessimistic Approach***" - assuming the possibility that any future calamity can affect the factors considered- we have taken the rate as 2%. These approaches are captured in the forecast illustration below.

6.1.2 Forecast of Outbound Tourists from South Korea

Figure 78: Present & Forecasted FTAs from South Korea



The above data in tabular format is as presented below.

Table 33: Present & Forecasted FTAs from South Korea to India

Years	Optimistic Approach	Most Likely Approach	Pessimistic Approach
2006	70407	70407	70407
2007	84583	84583	84583
2008	82335	82335	82335
2009	70485	70485	70485
2010	95587	95587	95587
2011	108680	108680	108680
2012	109469	109469	109469
2013	112619	112619	112619
2014	106870	106870	106870
2015	102993	102993	102993
2016*	109173	107422	105053
2017*	115723	112041	107154
2018*	122666	116859	109297
2019*	130026	121884	111483
2020*	137828	127124	113713
2021*	146098	132591	115987

**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 South Korea 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 2500 travellers and tour operators was conducted in the South Korean cities of Seoul and Busan. These 2500 travellers consisted of 1800 past travellers and 700 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 South Koreans are not much aware of India as comprising a variety of tourism options and destinations and they perceive India as a beautiful place with a lot of unique culture and heritage. This knowledge of India stems from the common roots of Buddhism that South Koreans and Indians share. The top of the mind impression of India for South Koreans is Delhi, Agra, Jaipur and Gaya. Also South Koreans are more interested in the culture that India has to offer, Indian outfits, festivals and spicy Indian Food.

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 South Korean travellers are the facet of lack of safety and security, crowdedness, poverty & begging, pollution and communication with locals. This along with an unfounded fear that India is a very big country and something might go wrong during their trip are factors that make South Koreans take a back step from actually visiting India. This fear is enhanced by the fact that knowledge about the developments in India is not present amongst many travellers since communication about the new and developing India is not present amongst the mainstream media. Also another reason for this phobia that something will go wrong in India stems from the spurt of news about security concerns in India, especially lack of security of women travellers in India.

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 and not sure about the kind of risk present during travelling to India, so prefer an agent who has experienced India, can tell them about India and also provide security in case something goes wrong. Food, though an issue with many western travellers to India, for South Korean travellers food is not an issue as most of them are interested in trying Spicy/masala food.

As per the trade, the major destination for Koreans is neighbouring Japan as well as USA, Thailand, China, Hong Kong, Singapore, etc. Japan always used to be on top earlier but sometimes due to the strained ties between South Korea and Japan, the tourism suffers between the two countries. For India, one of the most important hindrances from travellers is that there is lack of knowledge about the options of tourism in India. One tour operators mentioned "*They travel for vacations/Leisure to Thailand/Phuket and Hong Kong/ Malaysia and other South Asian countries and do not think twice about the distance or duration of flight. But when it comes to India, they suddenly go – oh it is so far away. They do not know that India is only 3 hours more from Thailand and that information is missing in the travel environment in South Korea. Hence people opt for Thailand & Phuket and not India*". The trade also pointed out that there are no information flows from India regarding the kind of country it is or the changes taking places and information regarding lack of security of women and general safety concerns in India are only present in news articles about India. The trade feels that there needs to be a steady flow of positive information about India in the mainstream South Korean media so as the information gaps amongst travellers is removed subtly and slowly.

One tour operator quipped "*India is not in the mind of the traveller when he is deciding his next trip. He has not seen India's tourism products in adverts nor has he heard about the tourism products that India offers. He does not know about India. So why should he suddenly consider India? Nowadays travellers set up their mind about the destination and then approach tour operators and not the other way round. A tour operator cannot make a travellers change his plans from the country he has decided to one (India) he knows nothing about, based on the tour operator's advice*". Also, the internal travel from one city to another in India is not cheap. There is an urgent need to advertise that India is a safe destination; that females can travel alone to India.

The other major issue that travellers face is obtaining Visa for India and also size of the photo required for visa is not mentioned. The visa process is complicated as per travellers. The Visa rules keep on changing as per travellers and trade. The trade feels that the application should be direct to the embassy as people at the Visa agency (3rd party) do not have knowledge about it. Secondly this shall reduce the processing time. In case of rejection, lot of time is lost.

Roadmap to Improve Promotional Activities:

- Positive news of India needs to be circulated in the mainstream South Korean Media. Currently only negative news about security concerns in India reach the common South Koreans.
- India is not in the mind of travellers. Regular flow of positive information about India needs to present in the mainstream media to keep India always in the mind.
- Travellers are not much aware about India and about the promotional /publicity material available at various forums but, these are not helping the travellers to plan their travel. The information provided needs to be more comprehensive and clear. Travellers feel the need of a travel itinerary.
- 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 “Visit India” rather than simply describing India.
- Travellers only aware of Golden Triangle, Buddha circuit & Delhi. 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 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'. There is a need for an integrated approach by India Tourism Office and tour operators. India Tourism Office must participate in important fairs and festivals where they can sponsor any event which will finally send a message to "*Visit India"* and not just educate travellers about India. More regular communication with tour operators is required with regards to events that can be organized to boost tourism to India. Since there is not India Tourism Office in South Korea, the trade does not know who to approach in case of any requirements and also in cases when face to face communication is required, trade cannot go to Tokyo to India Tourism Office there. It is required to appoint a person in South Korea, who can be approached by trade in case of any requirements.

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 currently shown in channels that are international and the same for the entire Korean country. Local channels in South Korea, which are most watched by the potential travellers are not showing India Tourism advertisements. The same is happening in case of print advertisements too. 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 celebrities and famous personalities to promote the pleasant experiences that they had encountered during their stay in India. Regular positive information about India needs to be circulated in the media so as to keep India in the minds of the travellers.

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 travel guide or plan with lots of stimulus is essential. Thus it is imperative to categorise the travellers from any particular country on the basis of their travel pattern and habit/ behaviour. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website. A promotional campaign addressing the safety and security concerns of India needs to be present in the mainstream media so that travellers' fears on the issue can be out to rest. Also information about India travel like distance, direct flights, flight duration etc. needs to be present in some campaigns about proximity of India.

7.2 Way Forward – Long Term and Short Term Measures to Promote Indian Tourism

Short Term Measures:

- Feature Incredible India advertisements in popular local channels and mainstream popular print media and more importantly on social media.
- A promotional campaign addressing proximity of India
- Promotional campaign addressing safety and security concerns in India that worry South Korean travellers
- A social media campaign of India Tourism highlighting the most liked aspects of tourism in the South Korean context.
- Regular flow of positive information about India in the popular mainstream media
- Organize focused Familiarization tours for media persons and tour operators.
- Impart training to front office executives who are in direct contact with prospective travellers so as they can handle all types of queries.

- Though enough publicity material is there, but it is all out-dated, 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
- Appointment of a permanent person in South Korea from India Tourism office who can be contacted by Trade in case of any requirements
- 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	7
		Newspaper____________________________	8
		Consumer Fairs & Exhibitions	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 not travelled in last one year BUT INTENDING TO TRAVEL)

GENDER OF THE RESPONDENT: **(Do NOT ask; Code only)** 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 Digital (Face book / You tube) Fairs & Festivals (India Stall)	7 8 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

5. Countries where you offer travel or tourism services.

Collect visiting card

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!