

Study on Tourism in Overseas Market of Germany

Final Report – Germany

For

Market Research Division
Ministry of Tourism
Government of India

सत्यमेव जयते
Government of India



nielsen

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Executive Summary

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 Germany to India is moderate to high (2,39,000 FTAs from Germany to India in 2014) owing to the strong relationship between the two countries, a vast opportunity lies untapped in the form of outbound travellers from the German market as the outbound travellers from Germany stands at 23.69 lakhs in 2014[1]. 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.

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

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

[1] Source: http://ec.europa.eu/eurostat/statistics-explained/index.php/File:Tourism_trips_of_residents_(aged_15_years_or_more),_2014_YB16.png

Company. The categories of respondents are pas and prospective outbound tourists, travel houses.

India has for long been known for its rich culture and heritage beautiful and artistic historical monuments, cuisine with traditional Indian spices and herbs, pocket friendly rates, breath-taking natural beauty and a wide range of tropical beaches. Given the fact that India and Germany share a strong relationship since India's freedom, awareness among German nationals about India is not very high.

For holidaymakers from Germany, India is a long haul destination. On virtue of having friends and relatives visit India, they have knowledge of select destinations that are popular in Germany. German past travellers to India on a package tour has spent around INR 1.9 lakh per person on an average while past travellers to India on a non-package tour has spent around INR 1.6 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.

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

Trade/ Tour Operator:

Focussing on trade and forming a symbiotic relationship with trade will foster a greater number of foreign tourist visits to India. It is also suggested that more liaising with German tour operators and training them about Travel in India are facilitated by the India Tourism Office in Germany so as to increase the tourist traffic to India. It is also suggested to improve the number of tour operators who sell India by providing free training and tutorials for tourism in India by Ministry and motivate them to work for 'India Tourism Office'. India Tourism Office must publicize their presence in Frankfurt as it is almost unknown both to travellers and direct sellers of tour packages. India's participation in important fairs and festivals is already present but it is imperative that they sponsor events which will finally send a message to "*Welcome to India"* in regular intervals so as India stays in the minds of potential travellers. More communication with tour operators is required with regards to events that can be organized to boost tourism to India. Regular updates to trade should be done regarding visa rules, changes in any rules and regulations in India, new destinations, new property, new facilities, etc. so that the constant information flow is present amongst the trade from the Indian Tourism Office.

Media:

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

Traveller:

The travellers in Germany do not get to see much of India Tourism advertisements in the popular local German media and hence an effort to overturn this situation is

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

Way Forward – Short Term Measures:

- Incredible India advertisements in local language on local popular German channels like ARD, ZDF, RTL, etc. on TV and popular social media
- India tourism brochures, maps and guidebooks in the local language
- Publicity of the presence of India Tourism Office in Frankfurt as most potential travellers are oblivious of the fact
- Putting out positive information on India in mainstream German media from time to time
- Publicity campaign featuring safety and security while travelling in India especially targeting women travellers from Germany
- Publicity campaign with focused travel plans
- State tourism boards advertising with specific products under the umbrella brand of “Incredible India”
- Feature Incredible India advertisements on social media
- Organize India nights and food festivals regularly so as to pique interest of German travellers about India
- Training and providing certified German speaking guides in various cities of India
- Impart training to front office executives who are in direct contact with prospective travellers so as they can handle all types of queries
- No new publicity material is there, there is no mention about New India – new destinations, new products, new packages, new circuits and new luxury

properties need to be promoted alongside well known destinations, so as to offer a large choice in front of prospective travellers.

- Brochures with specific travel plans and itineraries
- Frequent interaction with tour operators – to remain connected.

Way Forward – Long Term Measures:

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

Chapter One
About The Study

1.1 Introduction

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

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

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

1.2 Terms of Reference

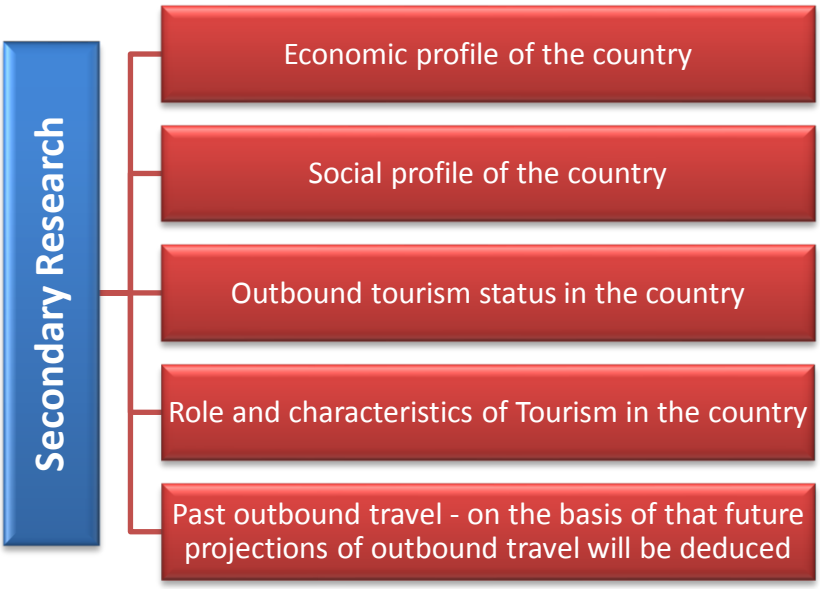
To conduct a study on tourism in the overseas markets of Germany, Japan, Russia, South Africa, South Korea and Turkey. The study will include a primary survey of past and prospective travellers besides compilation and analysis of information from secondary sources. Based on the secondary research and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

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

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

1.3 Research Approach & Methodology

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



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

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

Table 1: List of Stakeholder, Particulars and Roles

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

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

1.4 Sample Size

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

Table 2: Sample Size Distribution

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

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

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

1.5 Coverage

Segments

The following segments were covered by the study in Germany:

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

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

Germany 	Frankfurt	1000	1. Our Local office in Frankfurt, Munich, Hamburg, Berlin & Dusseldorf 2. Local directory (1800) 3. Local tour operators (1200)	Nielsen contacted 4900 respondents to achieve 3000 interviews
	Berlin	500		
	Munich	500		
	Hamburg	500		
	Dusseldorf	500		
	Total	**3000**		

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

1.6 Method of Inquiry

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

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

1.7 Conduct/ control of field operations in different location

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

1.8 Data analysis, quality control measures

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

Chapter Two
About The Country

2.1 Background – Germany

2.1.1 Introduction

Germany, also known as the Deutschland and officially known as The Federal Republic of Germany, is a federal parliamentary republic in west-central Europe. Its capital and largest city is Berlin. With about 81.5 million inhabitants, Germany is the most populous member state of the European Union. After the United States, it is the second most popular migration destination in the world.

Few countries have had as much impact on the world as Germany, which has given the world the Hanseatic League, the Reformation, Hitler and the Holocaust, but also the printing press, the automobile, aspirin and MP3 technology. It is the birthplace of Martin Luther, Albert Einstein and Karl Marx, of Goethe, Beethoven, the Brothers Grimm and other heavyweights who, each in their own way, has left their mark on human history.

Germany is a great power and has the world's fourth-largest economy by nominal GDP, as well as the fifth-largest by PPP. As a global leader in several industrial and technological sectors, it is both the world's third-largest exporter and importer of goods. Germany is a developed country with a very high standard of living sustained by a skilled and productive society. It upholds a social security and universal health care system, environmental protection and a tuition-free university education.

Germany was a founding member of the European Union in 1993 and a leading member. It is part of the Schengen Area, and became a co-founder of the Eurozone in 1999. Germany is a member of the United Nations, NATO, the G8, the G20, and the OECD. The national military expenditure is the 9th highest in the world. Known for its rich cultural history, Germany has been continuously the home of influential artists, philosophers, musicians, sportsmen, entrepreneurs, scientists and inventors.

2.1.2 Social Profile

Europe's largest economy and second most populous nation (after Russia), Germany is a key member of the continent's economic, political, and defence organizations. European power struggles immersed Germany in two devastating World Wars in the first half of the 20th century and left the country occupied by the victorious Allied powers of the US, UK, France, and the Soviet Union in 1945. With the advent of the Cold War, two German states were formed in 1949: the western Federal Republic of Germany (FRG) and the eastern German Democratic Republic (GDR). The decline of the USSR and the end of the Cold War allowed for German unification in 1990. In January 1999, Germany and 10 other EU countries introduced a common European exchange currency, the euro.

The Nazi rule in Germany is one of the darkest chapters in the history of the country and also in the history of the World. The Nazi Party won the special federal election of 1932. After a series of unsuccessful cabinets, Hindenburg appointed Adolf Hitler as Chancellor of Germany in 1933. The Enabling Act of 1933 gave Hitler unrestricted legislative power; subsequently, his government established a centralised totalitarian state, withdrew from the League of Nations following a national referendum, and began military rearmament. In what later became known as The Holocaust, the German government persecuted minorities and used a network of concentration and death camps across Europe to conduct genocide of what they considered to be inferior races. In total, over 10 million civilians were systematically murdered, including 6 million Jews, between 220,000 and 1,500,000 Romani, 275,000 persons with disabilities, thousands of Jehovah's Witnesses, thousands of homosexuals, and hundreds of thousands of members of the political and religious opposition. Nazi policies in the German occupied countries resulted in the deaths of 2.7 million Poles, 1.3 million Ukrainians, and an estimated 2.8 million Soviet war prisoners. Strategic bombing and land warfare destroyed many cities and cultural heritage sites. After World War II, former members of the Nazi regime were tried for war crimes at the Nuremberg trials.

Germany's population is estimated at around 80 million making Germany the 18th most populous country in the world. The ethnic groups in Germany include German - 91.5%, Turkish - 2.4%, other - 6.1% (made up largely of Greek, Italian, Polish, Russian, Serbo-Croatian, Spanish). German is the official language spoken and Danish, Frisian, Sorbian, and Romany are official minority languages; Low German, Danish, North Frisian, Sater Frisian, Lower Sorbian, Upper Sorbian, and Romany are recognized as regional languages under the European Charter for Regional or Minority Languages. Berlin apart from being the capital of Germany is also its largest city.[2]

2.1.3 Urban/ Rural Population

Germany is a majorly urbanized population with 75.3% of the total population (2015) living in urban areas. Germany has a number of large cities. There are 11 officially recognised metropolitan regions in Germany. Major urban areas, with respect to population, are Berlin, Hamburg, Munich and Cologne (2015). [3]

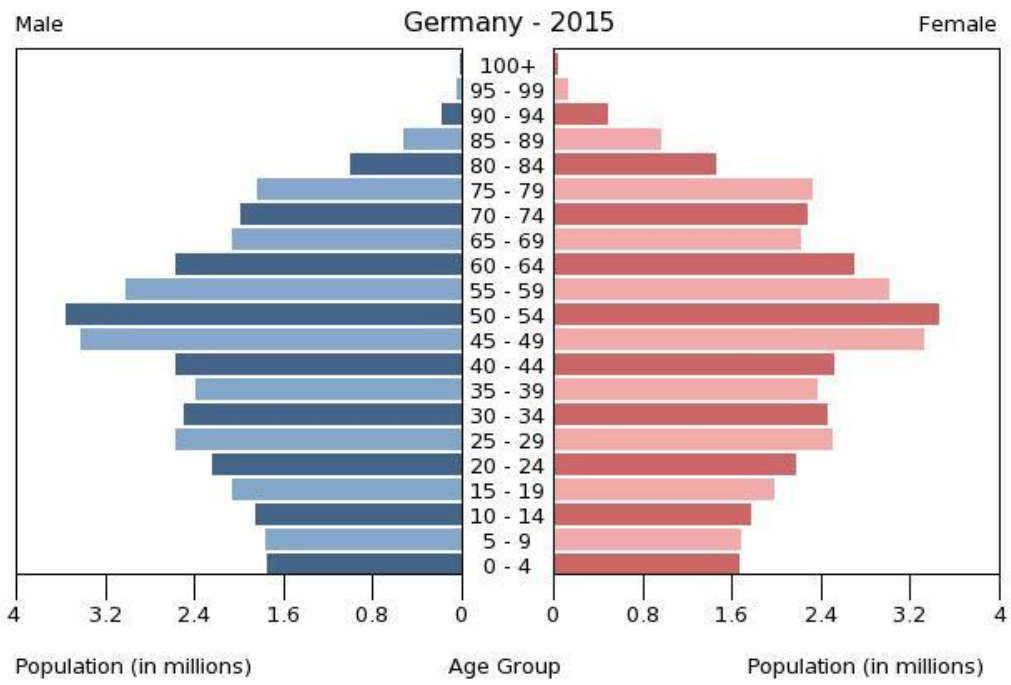
2.1.4 Gender Statistics

As per the World CIA Factbook, in 2015 the country's population was 80,854,408, of which 39,723,220 were male and 41,131,188 were female.

The population distribution for Germany by gender and age groups are given as follows.[4]

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

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



2.1.5 Prominent Religious Groups

In Germany there are 34% Protestants, 34% Roman Catholics, 3.7% Muslims and 28.3% unaffiliated or other religion practising people. [5]

2.1.6 Age Distribution

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

Table 4: Age Distribution of Population

S. No.	Age Group	Percentage of the Population	Male Population	Female Population
1	0-14 years	12.88%	5,346,086	5,068,071
2	15-24 years	10.38%	4,279,962	4,113,746
3	25-54 years	41.38%	16,934,180	16,519,932
4	55-64 years	13.91%	5,571,694	5,675,104
5	65 years and over	21.45%	7,591,298	9,754,335

2.1.7 Literacy

Literacy level in Germany is defined as people who can read and write above the age of 15. The total percentage of literates in Germany is 99% of the total

[5] Source: CIA World Factbook

population. The literacy levels amongst male population are also 99% and the literacy level amongst the female population is cited as 99% of the total population.[6]

2.1.8 Economic Profile

Germany has the 5th largest economy in the world by purchasing power parity (PPP) and Europe's largest. Germany has a social market economy with a highly skilled labour force, a large capital stock, a low level of corruption, and a high level of innovation. It is the world's third largest exporter of goods, and has the largest national economy in Europe which is also the world's fourth largest by nominal GDP and the fifth one by PPP.

The service sector contributes approximately 71% of the total GDP (including information technology), industry 28%, and agriculture 1%. The unemployment rate published by Eurostat amounted to 4.7% in January 2015. This is the lowest rate of all 28 EU member states. With 7.1% Germany also has the lowest youth unemployment rate of all EU member states. According to the OECD Germany has one of the highest labour productivity levels in the world.

Being home to the modern car, the automotive industry in Germany is regarded as one of the most competitive and innovative in the world, and is the fourth largest by production. The top 10 exports of Germany are vehicles, machinery, chemical goods, electronic products, electrical equipment, pharmaceuticals, transport equipment, basic metals, food products, and rubber and plastics. Germany is a leading exporter of machinery, vehicles, chemicals, and household equipment and benefits from a highly skilled labour force. Low fertility rates and a large increase in net immigration are increasing pressure on the country's social welfare system and necessitate structural reforms. The German economy suffers from low levels of investment, and a government plan to invest 15 billion euros during 2016-18, largely in infrastructure, is intended to spur needed private investment. Domestic consumption, bolstered

[6] Source: CIA World Factbook

by low energy prices and a weak euro, are likely to drive German GDP growth again in 2016.[7]

2.1.9 Gross Domestic Product (GDP)

Germany's GDP (purchasing power parity) in 2015 (estimate) was US$ 3.842 Trillion. Germany ranks 6th in terms of country GDP in the world. The GDP growth rate for Germany (2015 estimate) is 1.5%. The PPP of Germany stands at US$ 47,400 (2015 estimate).[8]

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

Year (est.)	USD
2015	US$ 3.842 Trillion
2014	US$ 3.785 Trillion
2013	US$ 3.726 Trillion
Source: https://www.cia.gov	

2.1.10 Per Capita Income/ Spending Power

Germany ranks 29th in the world with regards to purchasing power parity.

Table 6: Germany GDP (purchasing power parity)

Year (est.)	USD GDP Per capita (PPP)
2015	USD 47,400
2014	USD 46,700
2013	USD 45,900
Source: https://www.cia.gov	

2.2 Tourism Overview

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

2.2.1 General Overview

In 2012, Germany was visited by 30.4 million international tourists; it is the seventh most visited country in the world. Berlin has become the third most visited city destination in Europe. Additionally, more than 30% of Germans spend their holiday in their own country, with the biggest share going to Mecklenburg-Vorpommern. Domestic and international travel and tourism combined directly contribute over EUR43.2 billion to German GDP. Including indirect and induced impacts, the industry contributes 4.5% of German GDP and supports 2 million jobs (4.8% of total employment).

Germany contains 40 UNESCO World Heritage Sites, including the old town cores of Regensburg, Bamberg, Lübeck, Quedlinburg, Weimar, Stralsund and Wismar. Germany's most-visited landmarks include i. e. Neuschwanstein Castle, Cologne Cathedral, Berlin Bundestag, Hofbräuhaus Munich, Heidelberg Castle, Dresden Zwinger, Fernsehturm Berlin and Aachen Cathedral. The Europa-Park near Freiburg is Europe's second most popular theme park resort. Germany is well known for its diverse tourist routes, such as the Romantic Road, the Wine Route, the Castle Road, and the Avenue Road.

2012 was a particularly successful year for the tourism industry. For the third consecutive year Germany reported record numbers of overnights of 407.3 million. International visitors showed particularly strong growth, rising 8.1% to 68.8 million. The largest numbers of foreign tourists (roughly 16% of all non-resident overnight) come from the Netherlands. Hamburg and Berlin were able to benefit most from this positive development, reporting the biggest increase in Germany in terms of overnight in 2012. This clearly underlines the positive trend in city-based tourism.

2.2.2 Inbound Travel

The value for International tourism, number of arrivals in Germany 31,545,000 as of 201. The top 5 countries from where tourists frequent Germany are The Netherlands, Switzerland, USA, England and Italy. The following table depicts the inbound traffic or the international tourist arrivals in Germany.

Table 7: Foreign Tourist Arrivals

Year	International Tourist Arrivals[9]
2007	24,421,000
2008	24,884,000
2009	24,220,000
2010	26,875,000
2011	28,374,000
2012	30,411,000
2013	31,545,000
2014	32,999,000

2.2.3 Seasonality of Tourism

The summer months of June and July which are the school holiday season in Germany are popular for travel. Also the Christmas and New Year holidays are the preferred time of travel for many Germans during winter.

2.2.4 Outbound Travel

Germans took 50% more long-haul trips in 2011 than a decade ago. While their appetite for long-haul travel has grown, short-haul travel has remained steady. Long-haul travel currently represents about 10% of total outbound travel or about eight million trips annually.

The value for International tourism, number of departures in Germany was 72,300,000 as of 2009. Over the past 12 years international tourist arrivals reached a maximum value of 77,400,000 in 2005 and a minimum value of 55,800,000 in 1997.

Table 8: Departure

Year	Departures[10]
2008	895233000
2009	861456000
2010	883175000

[9] Source: World Bank & http://www.indexmundi.com/facts/Germany/international-tourism
[10] Source: http://www.slovenia.info/pictures%5CTB_board%5Catachments_1%5C2014%5CTT14_DE_Tourism_Flows_Outbound_19142.pdf

2011	894420000
2012	920826000
2013	939957000

2.2.5 Preferred Outbound Destinations

Preferred destinations for travellers from Germany are USA, China, Canada, Brazil, South Africa, Australia, New Zealand, Belgium, Denmark, France, etc.[11]

2.2.6 Domestic Tourism in Germany

In 2012 total domestic trips made in Germany were 122,328,000. The following table shows the number of domestic tourists in Germany.

Table 9: Domestic Tourists

Year	Departures[12]
2008	108,061,000
2009	108,608,000
2010	113,116,000
2011	118,710,000
2012	122,328,000

In 2010, domestic visitors spent a total of 221.2 billion euros on same-day and overnight trips in Germany. Total internal tourism consumption comprises all monetary and in-kind consumption of foreign and domestic tourists in Germany. In 2010, total internal tourism consumption in Germany amounted to 278.3 billion euros. Domestic visitors spent 221.3 billion euros (79.5%) and thus the majority of total tourism expenditures.[13]

[11] Source: http://en.destinationcanada.com/sites/default/files/pdf/Research/Market-knowledge/Market-profile/Germany/de_market_profile_2013_feb-2013.pdf
[12] Source: file:///C:/Users/dattpo01/Downloads/DE_OECD2014TTP%20(3).pdf
[13] Source: http://www.bmwi.de/English/Redaktion/Pdf/the-economic-impact-of-germanys-tourism-industry,property=pdf,bereich=bmwi2012,sprache=en,rwb=true.pdf

2.3 Travel & Trade

2.3.1 Introduction

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

Travel & Tourism's impact on the economic and social development of a country can be enormous; opening it up for business, trade and capital investment, creating jobs and entrepreneurialism for the workforce and protecting heritage and cultural values. Tourism is one of Germany's most prosperous and lucrative economic sectors, generating close to EUR 100 billion in gross value added (4.4% of GDP). Visitor spending in Germany amounts to roughly EUR 280 billion. Some 2.9 million workers are directly employed in the industry. Germany is also enjoying unprecedented popularity as a destination for business travellers. In 2012, the number of European business trips to Germany rose by 12.3% to roughly 13 million. Germany is the world's top destination for international trade shows and boasts three of the five largest exhibition centres in the world.

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

The direct contribution of Travel & Tourism to GDP was EUR109.0bn (3.8% of total GDP) in 2014, and is forecast to rise by 3.0% in 2015, and to rise by 1.9% pa, from 2015-2025, to EUR136.2bn (4.1% of total GDP) in 2025. The total contribution of Travel & Tourism to GDP was EUR257.9bn (8.9% of GDP) in 2014, and is forecast to rise by 2.4% in 2015, and to rise by 1.8% pa to EUR314.6bn (9.5% of GDP) in 2025.

In 2014 Travel & Tourism directly supported 2,842,000 jobs (6.7% of total employment). This is expected to rise by 2.2% in 2015 and rise by 0.6% pa to 3,094,000 jobs (7.4% of total employment) in 2025. In 2014, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 11.7% of total employment (4,982,000 jobs). This is expected to rise by 1.7% in 2015 to 5,065,500 jobs and rise by 0.5% pa to 5,342,000 jobs in 2025 (12.7% of total). Visitor exports generated EUR38.4bn (2.9% of total exports) in 2014. This is forecast to grow by 2.3% in 2015, and grow by 4.0% pa, from 2015-2025, to EUR58.1bn in 2025 (3.0% of total).[14]

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

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

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

Frankfurt Airport (FRA) is the major international airport of Germany, located in Frankfurt. It is the third busiest airport of Europe. Other important airports in

[14] Source: http://www.veilleinfotourisme.fr/medias/fichier/germany2015-wttc_1428504349165-pdf

Germany are Munich airport and Berlin Tegel airport. Other international airports in Germany are listed below.

Name
Frankfurt Airport
Stuttgart Airport
Munich Airport
Nuremberg Airport
Saartrucken Airport
Cologne / Bonn Airport
Dusseldorf Airport
Munster / Osnabruck Airport
Bremen Airport
Hannovar Airport
Hamburg Airport
Tegel Airport (Berlin)
Schonefeld Airport
Dresden Airport
Leipzig / Halle Airport
Erfurt Airport
Dormund Airport

Nearly all major airlines and airports offer flights to Germany. The country's own leading airline, Lufthansa and India's Air India serves a broad range of international destinations. All Major airlines connect India to Germany. There are direct flights by Lufthansa and Air India between Delhi, Bengaluru, Chennai and Mumbai in India to Frankfurt and Munich in Germany. Besides this, there are indirect flights connecting the metros of India and other cities of Germany.

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 from top India destinations to Frankfurt, as on May 25, 2016	
Frankfurt	
(Indian Rupees)	Lowest prices
Mumbai	33,881
Delhi	21,569
Bengaluru	31,147
Chennai	34,969
Source: http://www.skyscanner.in	

Fare in Indian rupees for travel to top India destinations from Munich, as on May 25, 2016	
Munich	
(Indian Rupees)	Lowest prices
Mumbai	33,859
Delhi	50,108
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	

3.1 Past Outbound Travel Behavior

3.1.1 Profiling Information

3.1.1.1 Place of Residence

The survey investigated 2000 respondents (persons who have travelled abroad in the last one year) from Germany of which 20% of the travellers each were from the capital Berlin, Dusseldorf, Hamburg, Frankfurt and Munich.

Figure 2: Distribution of Past Travellers by Place of Residence

Map Source: Germanymap.facts.co

3.1.1.2 Age categories

27% of the respondents were in the age group of 36 to 50 years. 32% of the respondents were between 26 to 35 years of age. Overall, 59% of the

respondents were in their peak productive years between 26 and 50 years of age.

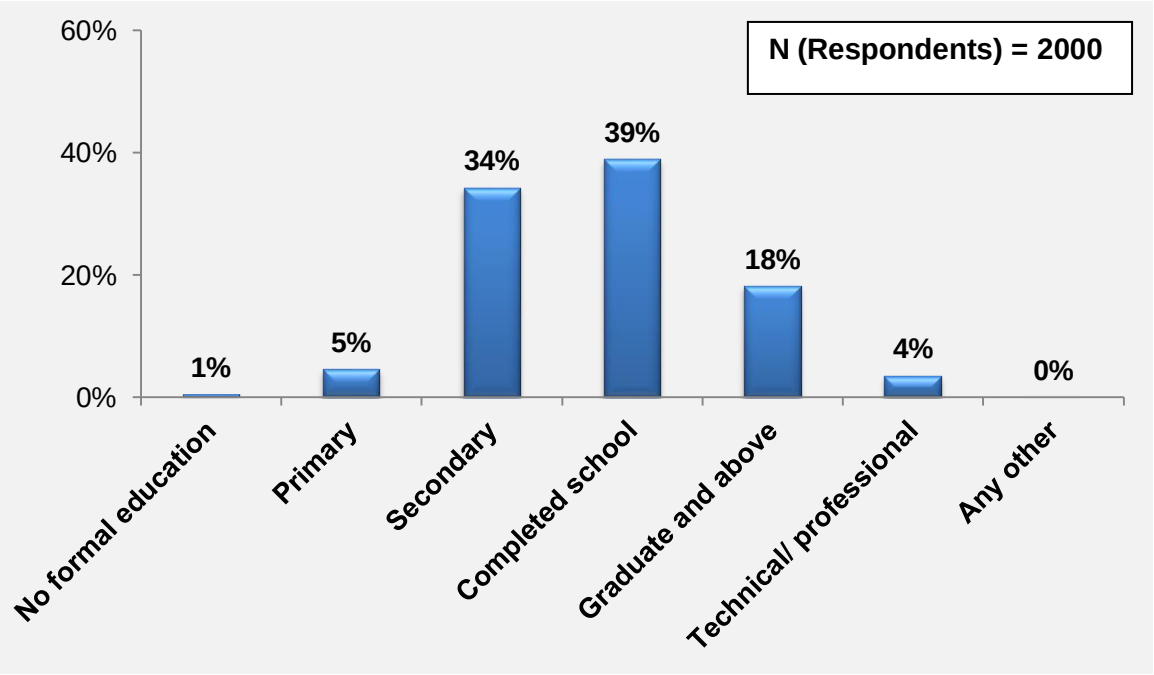
Table 12: Age Distribution

Age categories	No. of respondents	Percentage
Below 18 yrs	0	0%
18-25 yrs	607	30%
26-35 yrs	645	32%
36-50 yrs	533	27%
51-60 yrs	210	10%
Above 61 yrs	5	1%
Total	**2000**	**100%**

3.1.1.3 Educational Qualification of Respondents

39% respondents mentioned that they had completed school while 18% respondents out of the total 2000 past travellers to India and other countries mentioned that they had graduation degrees.

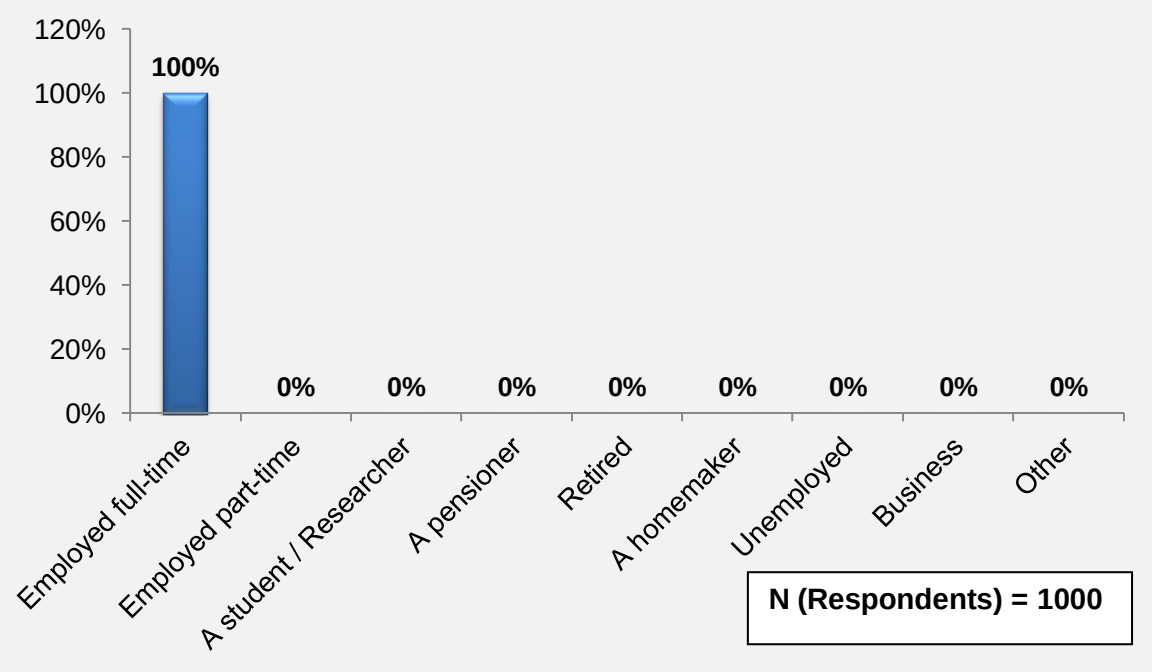
Figure 3: Educational Qualification of Respondents



3.1.1.4 Employment status of Past Travellers to India

100% respondents were employed full time.

Figure 4: Employment Status of Respondents



3.1.1.5 Gender

Women constituted about 12% of the survey participants. Overall, 250 women (past travellers) were interviewed during the primary survey across the six cities.

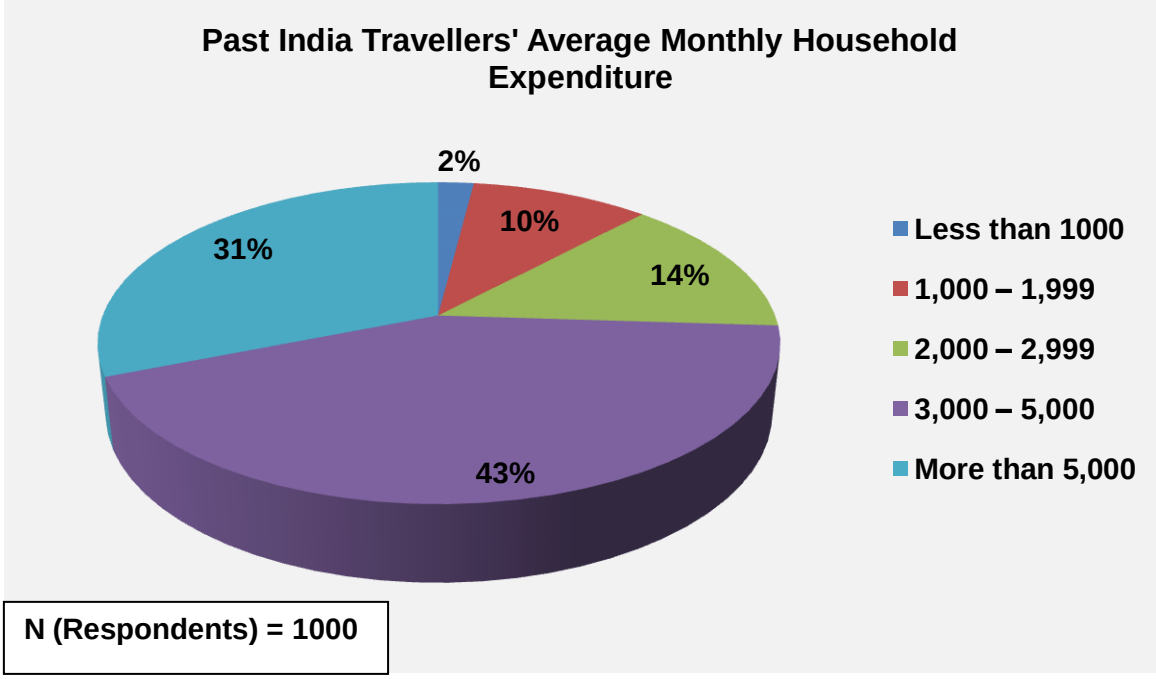
Table 13: Gender Distribution

Gender	No. of respondents	Percentage
Male	1750	88%
Female	250	12%
Total	**2000**	**100%**

3.1.1.6 By Average Monthly Household Expenditure of Past Travellers to India

43% 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 31%.

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

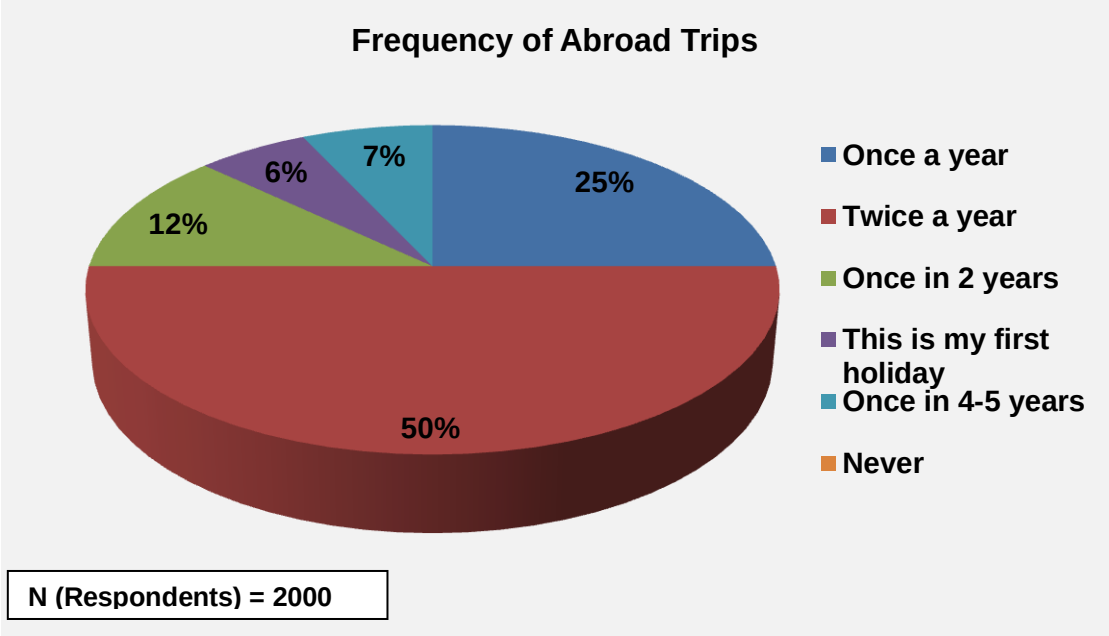


3.1.2 General Travel Behaviour

3.1.2.1 Frequency of trips abroad

Of the 2000 persons surveyed, 25% travel once a year. A substantive 50% travel several times in a year. 12% of respondents travelled once in two years.

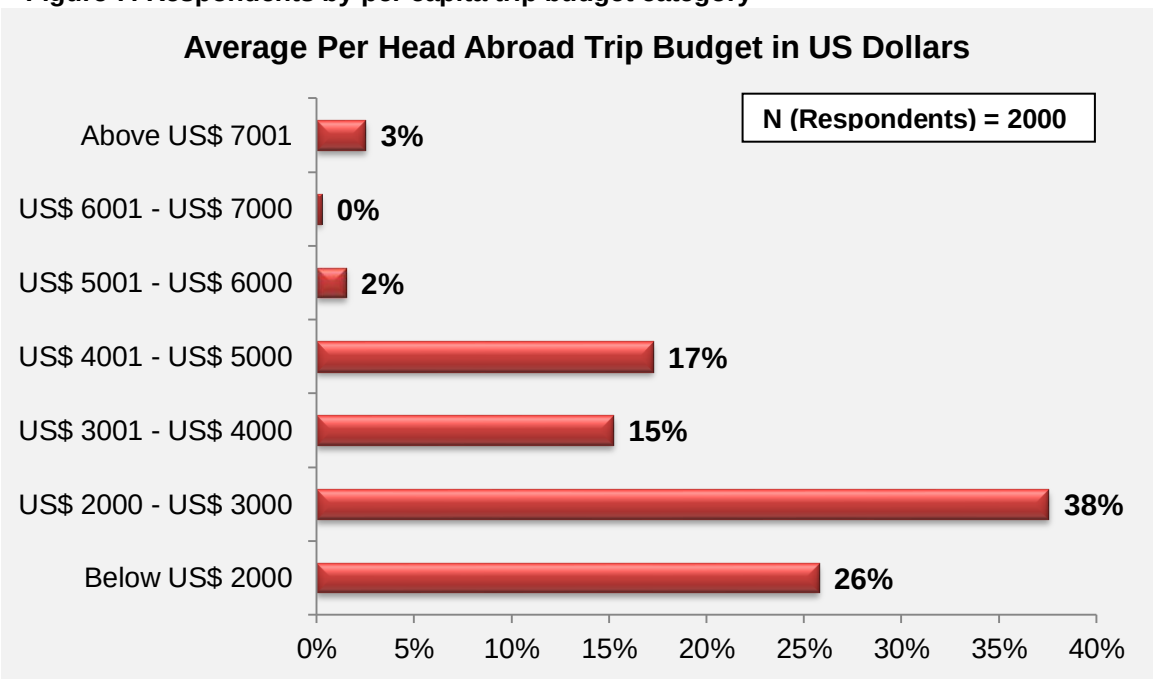
Figure 6: Respondents categorized by frequency of trips abroad



3.1.2.2 Average expenditure on trips

17% of the total 2000 travellers surveyed had a trip budget of US$ 4001 – US$ 5000 per head for a foreign trip. Another 15% budgeted in the range of US$ 3001– US$ 4000 per traveller. 3% of the respondents had an average budget of over US$ 7001 per head for an overseas trip.

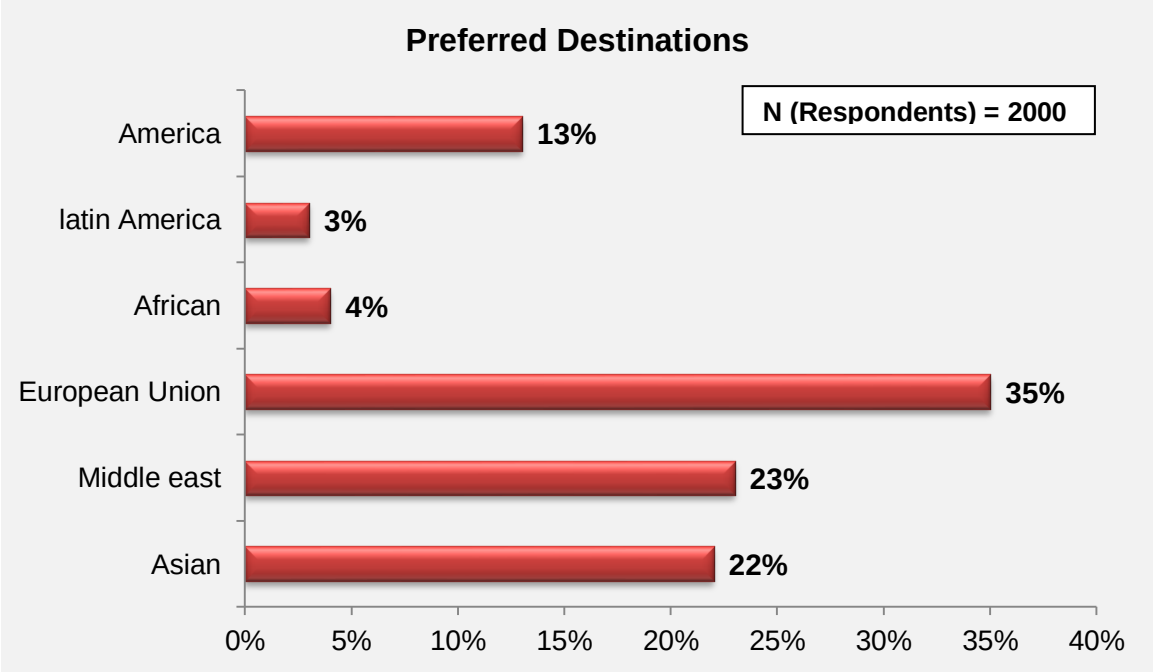
Figure 7: Respondents by per capita trip budget category



3.1.2.3 Preferred destinations

Respondents were asked to indicate their preferred foreign destinations for trips. In this analysis it was found that 22% of the responses were in favour of Asian destinations while another 35% responses showed in the inclination for EU. Of the 2000 responses received from 2000 respondents, 13% were in favour of countries in the North American continent while 4% respondents showed preference for African countries.

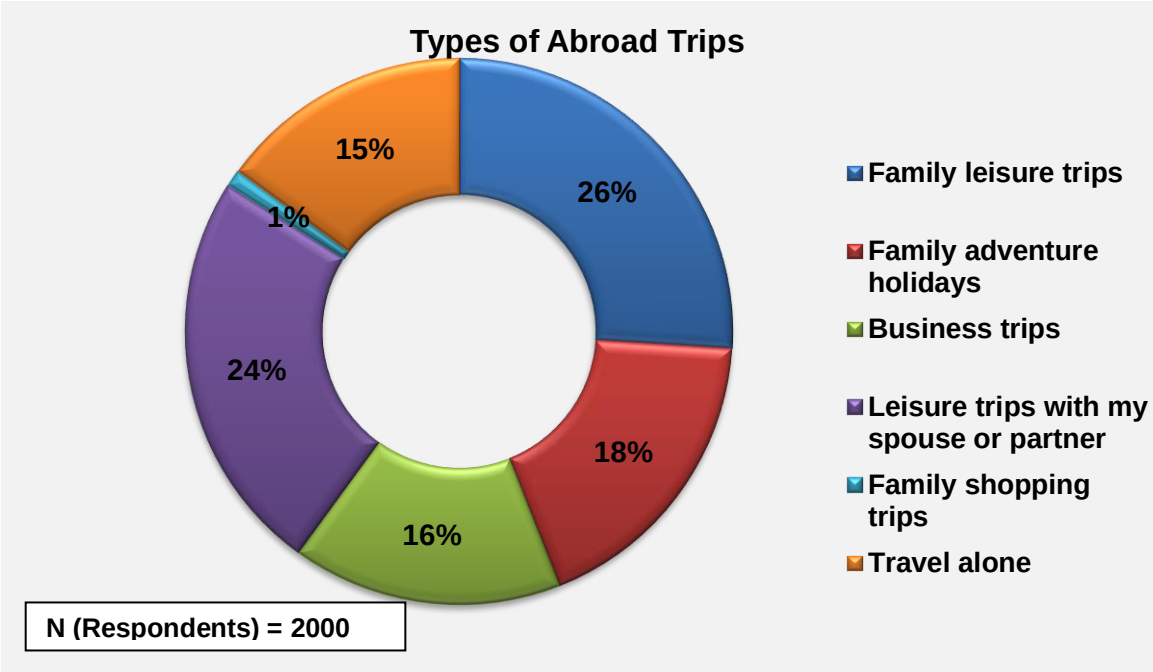
Figure 8: Revealed preferences for foreign destinations



3.1.2.4 Types of trip

26% of all 2000 respondents described their overseas trips in the last one year as family leisure trips. Around 16% claimed that they had travelled on business trips. 18% also enjoyed adventure holidays with their families. 24% of the total 2000 respondents claimed that they went on a leisure trip with their spouse or partner.

Figure 9: Respondents categorized by frequency of trips abroad



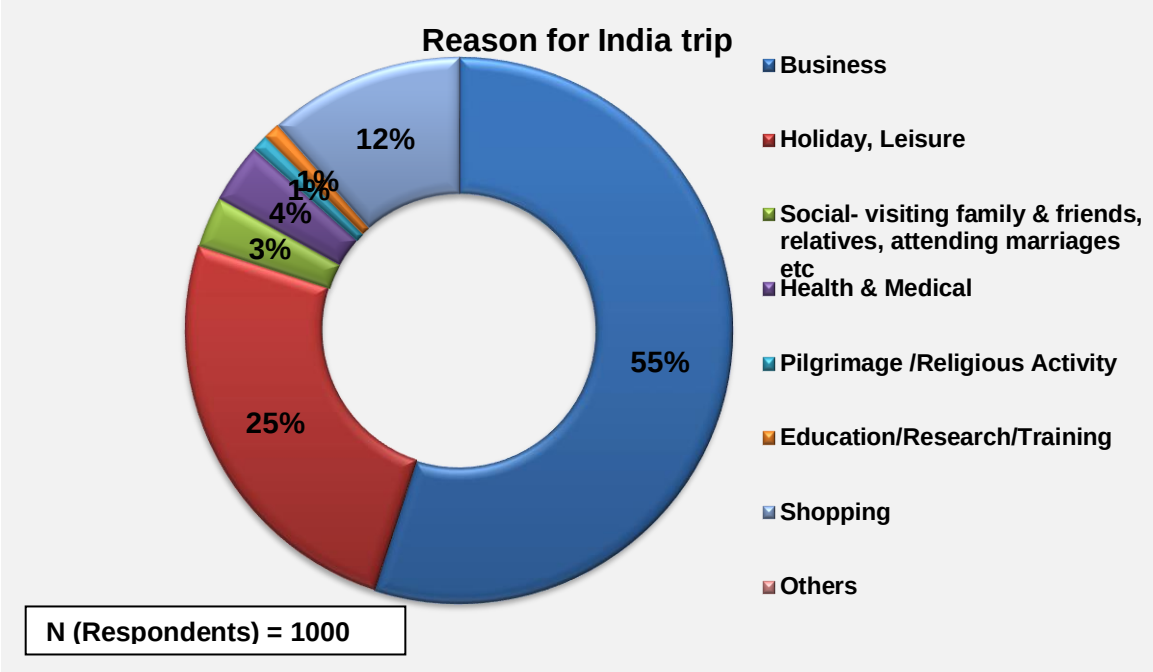
3.1.3 Travel Behaviour of Past Visitors to India

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

3.1.3.1 Reason for Travelling to India

Respondents were asked to indicate their reason for India visit. The maximum traction for India among these travellers from Germany exists because of the business activities that can be done here. 55% of total 1000 respondents indicated this. Other important reasons for travelling to India are holiday and leisure activities (25% of the total 1000 respondents). 3% responses were received in favour of social purposes.

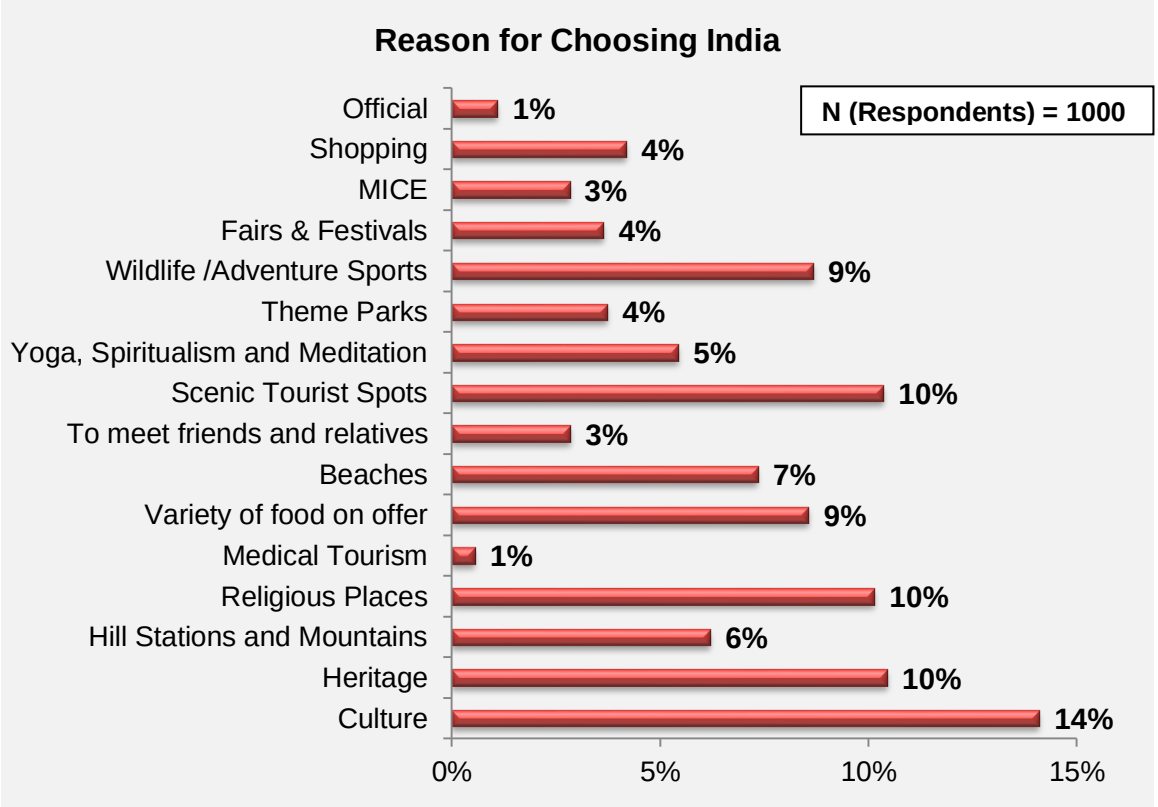
Figure 10: Reason for Travelling to India



3.1.3.2 Reason for Choosing India

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

Figure 11: Reason for choosing India



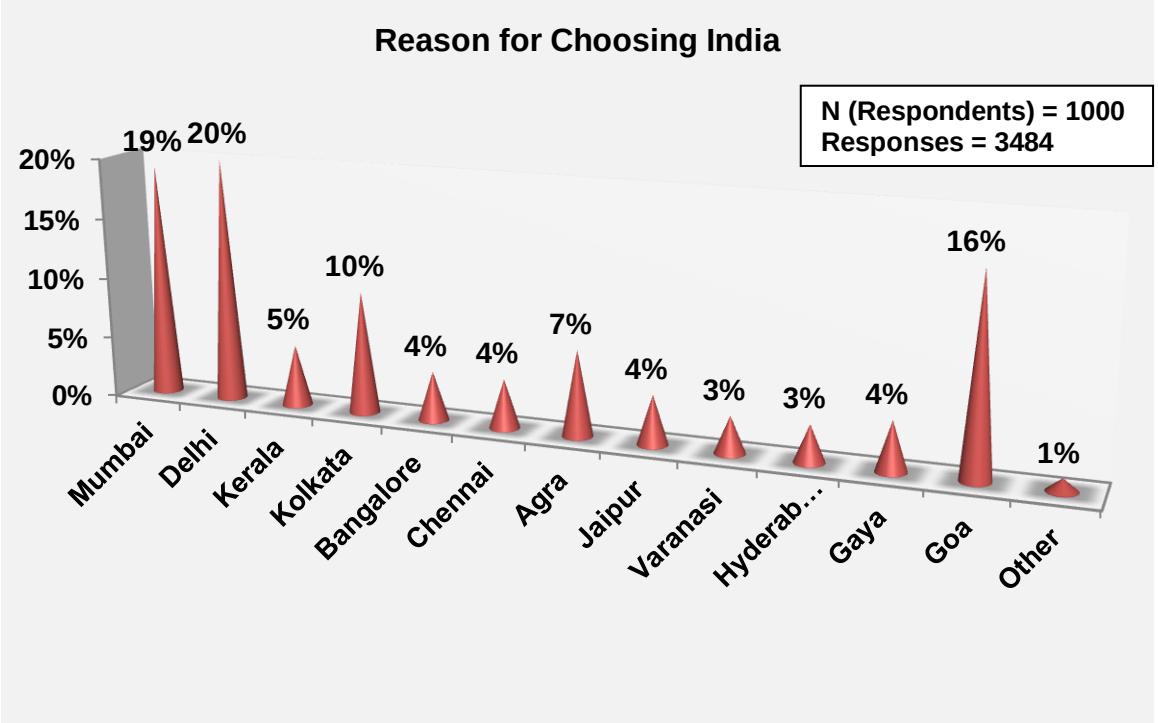
3.1.3.3 Respondent's Medical Tourism Details in India

30 respondents, who travelled to India in the past, mentioned that they did visit India for Medical Tourism purposes. Majority visited Delhi for medical tourism purposes and the specific destinations in Delhi were to AIIMS and to Apollo hospitals. 50% of the total 30 respondents mentioned that they were fully satisfied with the medical tourism facilities that they visited.

3.1.3.4 Cities Visited in India

1000 past India travellers to India mentioned the cities they visited in India during their visit. 1000 respondents provided 3484 responses regarding the cities in India they visited during their India trip. 20% of the total responses were received in favour of Delhi which came up as the most visited city in India by past German travellers to India. The next most visited city in India emerged as Mumbai with 19% of total responses received.

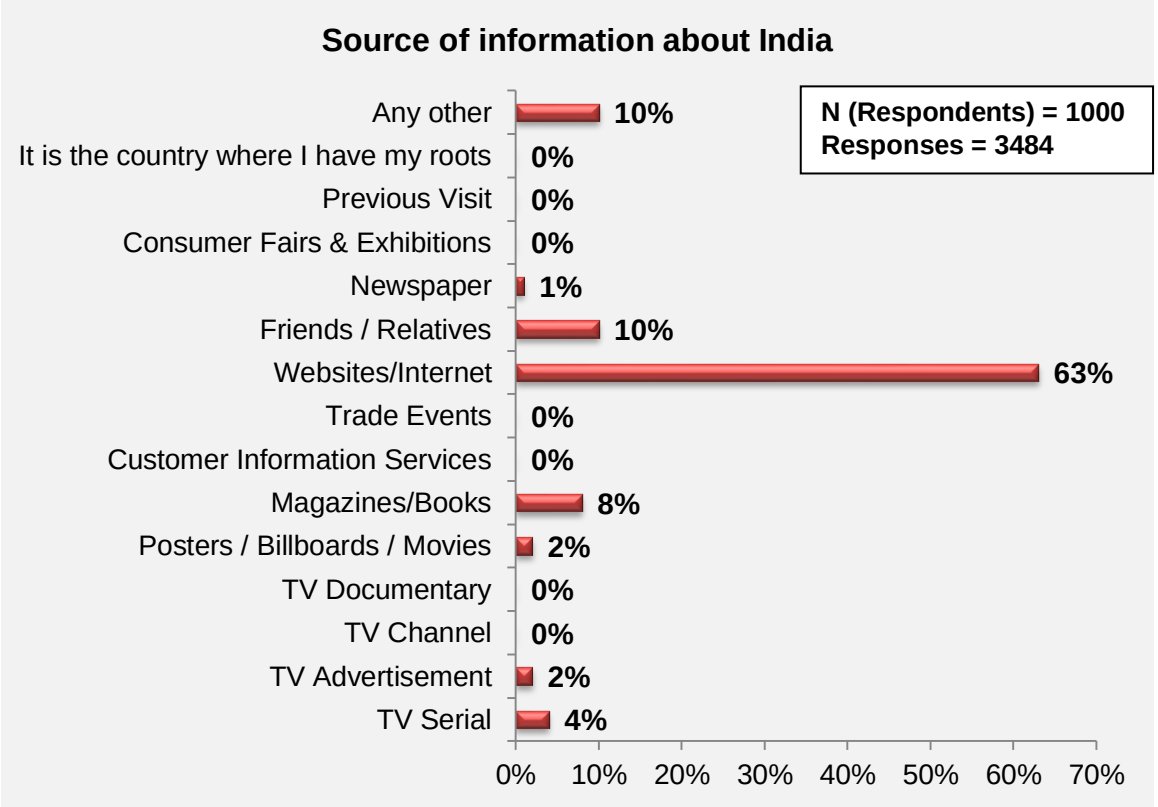
Figure 12: Cities Visited in India



3.1.3.5 Source of information regarding India

Respondents were asked to indicate their source of information about India and they were given the freedom to select multiple options. Travellers who have visited India is the past, have largely known about India through websites and internet, about 63% of responses received indicated this. Friends/ relatives are also an important source of information as was revealed by 10% of the responses received respectively.

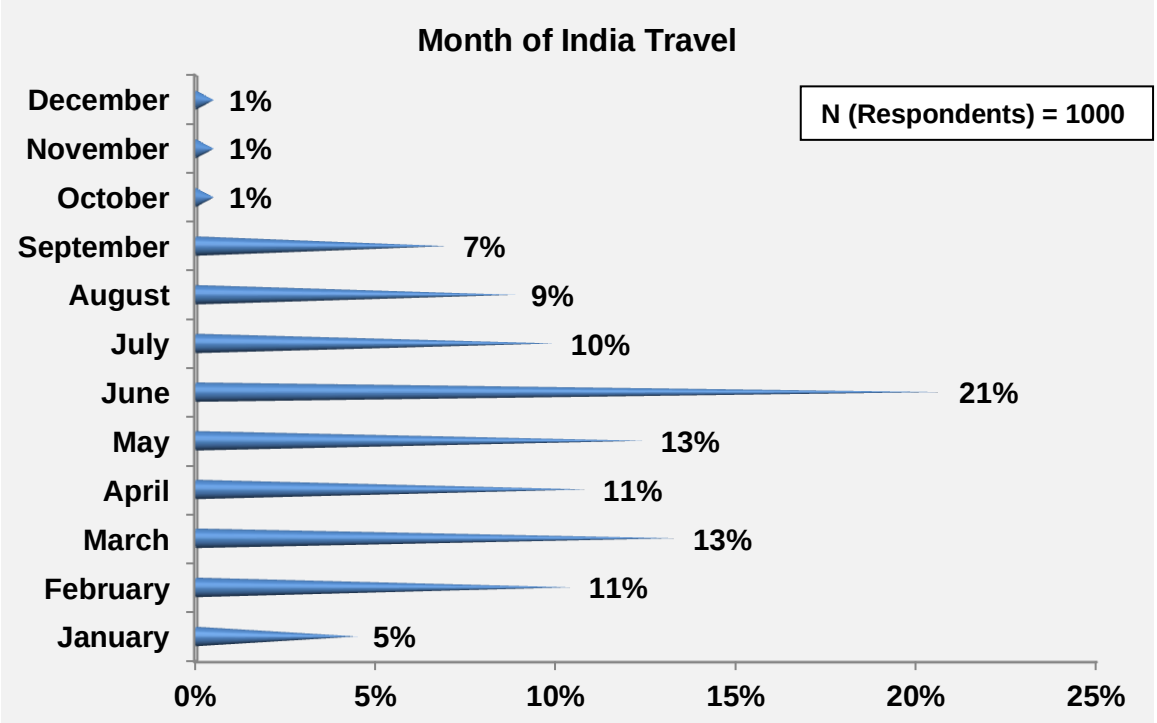
Figure 13: Source of information about India



3.1.3.6 Month of India Travel

1000 past travellers to India mentioned the month during which they visited in India. 21% of the total 1000 respondents mentioned June to be their month of visit. March was the month of visit for 13% of the total 1000 respondents. October to December was the months of least visits by Germanyns surveyed (1% each of total 1000 respondents).

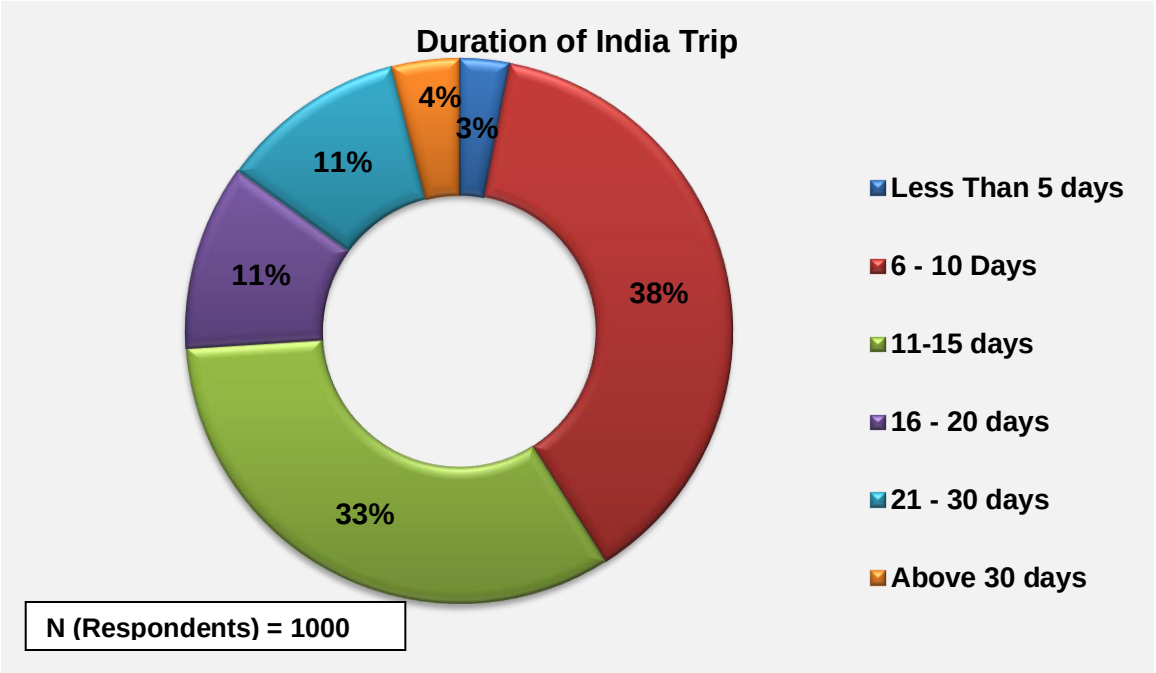
Figure 14: Month of India Travel



3.1.3.7 Duration of India Travel

33% of all 1000 respondents mentioned that their India trip duration was of 11–15 days. While 38% of the total 1000 respondents mentioned that their India trip lasted for 6–10 days. Only 4% of the total 1000 respondents toured India for more than 30 days.

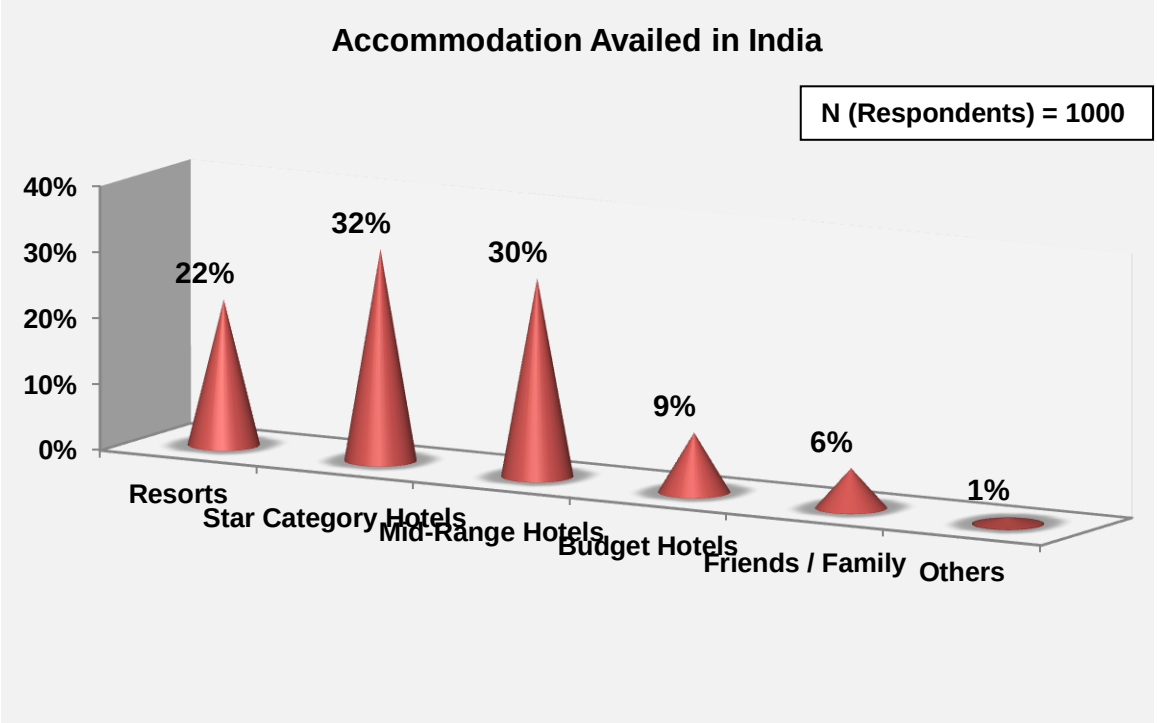
Figure 15: Duration of India travel



3.1.3.8 Accommodation Availed in India

32% of the total 1000 past travellers to India mentioned that they stayed in star hotels in India during their visit. 30% of the total 1000 respondents provided mentioned that they stayed in mid-range hotels during their India trip. Only 6% of the total respondents stayed with their friends and relatives during their India trip.

Figure 16: Accommodation Availed in India

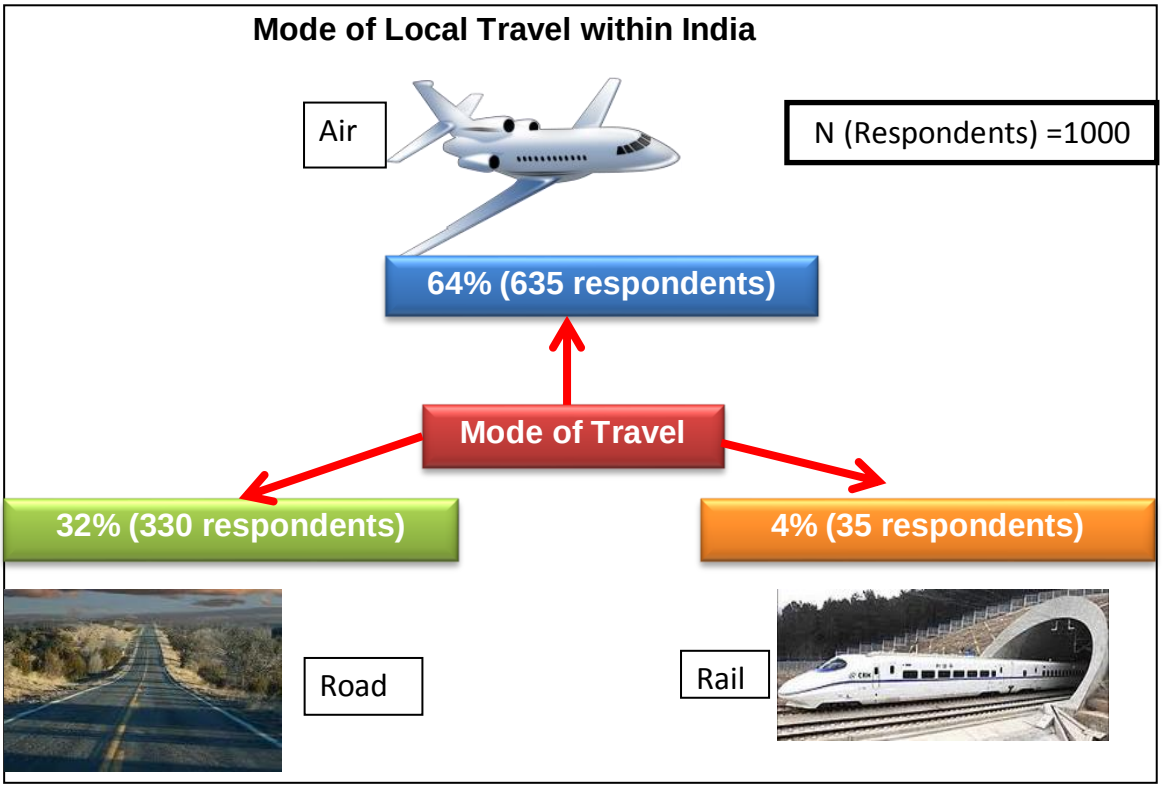


Note: Star category hotels: Hotels with more than 4 stars; Mid-ranged hotels: Hotels of 3 stars rating; Budget hotels: Hotels with 1-2 stars rating

3.1.3.9 Mode of local travel within India

Respondents who visited India were asked to indicate their choice of transport within India and they were given single option responses. It was found that within India, majority, 64% people travelled by air alone. Next most favoured mode of travel within India was by road (32% of the total 1000 respondents). Only 4% of the total 1000 respondents preferred to travel by rail within India.

Figure 17: Mode of Local Travel within India

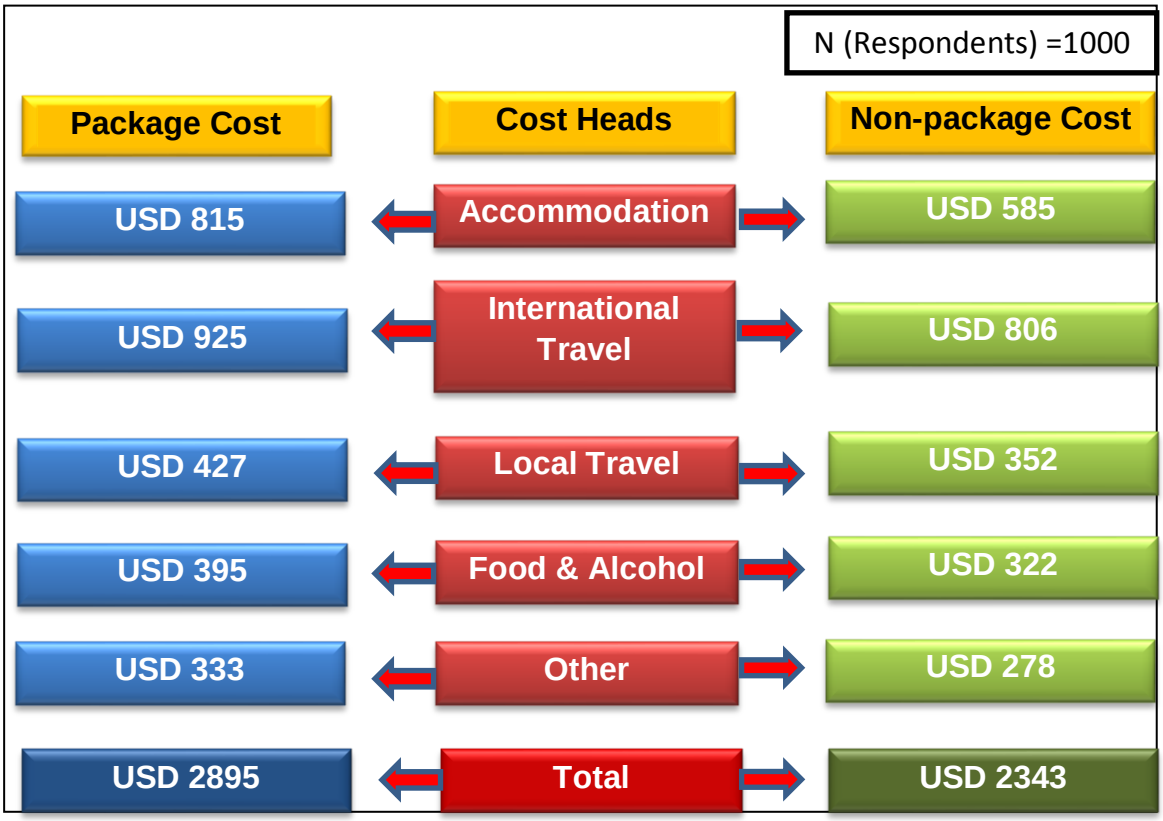


Of the 35 respondents who responded to the query on trains availed of, 30 claimed to have availed of the luxury trains like Deccan Odyssey, Golden Chariot and Indian Maharaja.

3.1.3.10 Expenses for India Trip

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

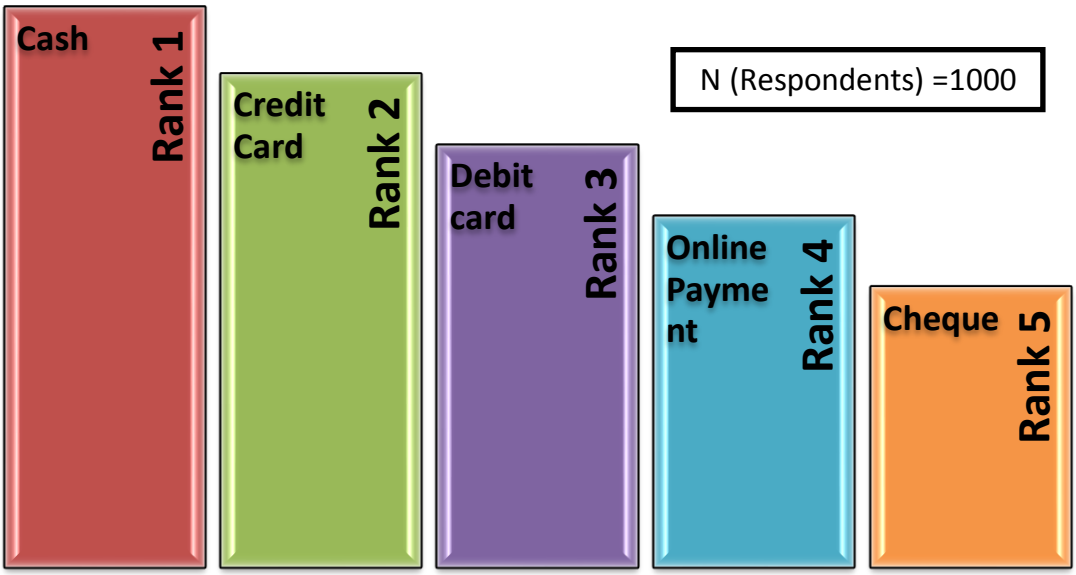
Figure 18: Average per Person Expenses for India Trip



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 German travellers to India are presented below.

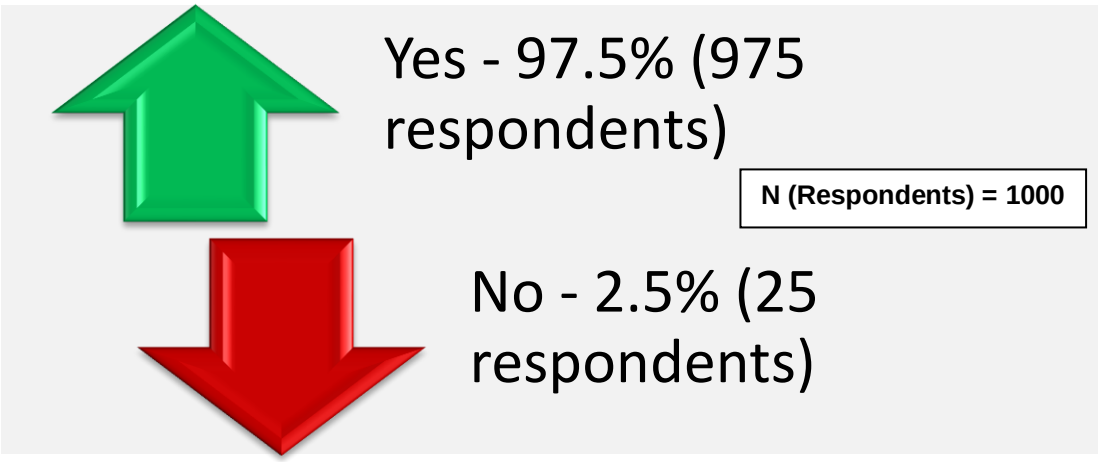
Figure 19: Payment Mode in India



3.1.3.12 Revisit India

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

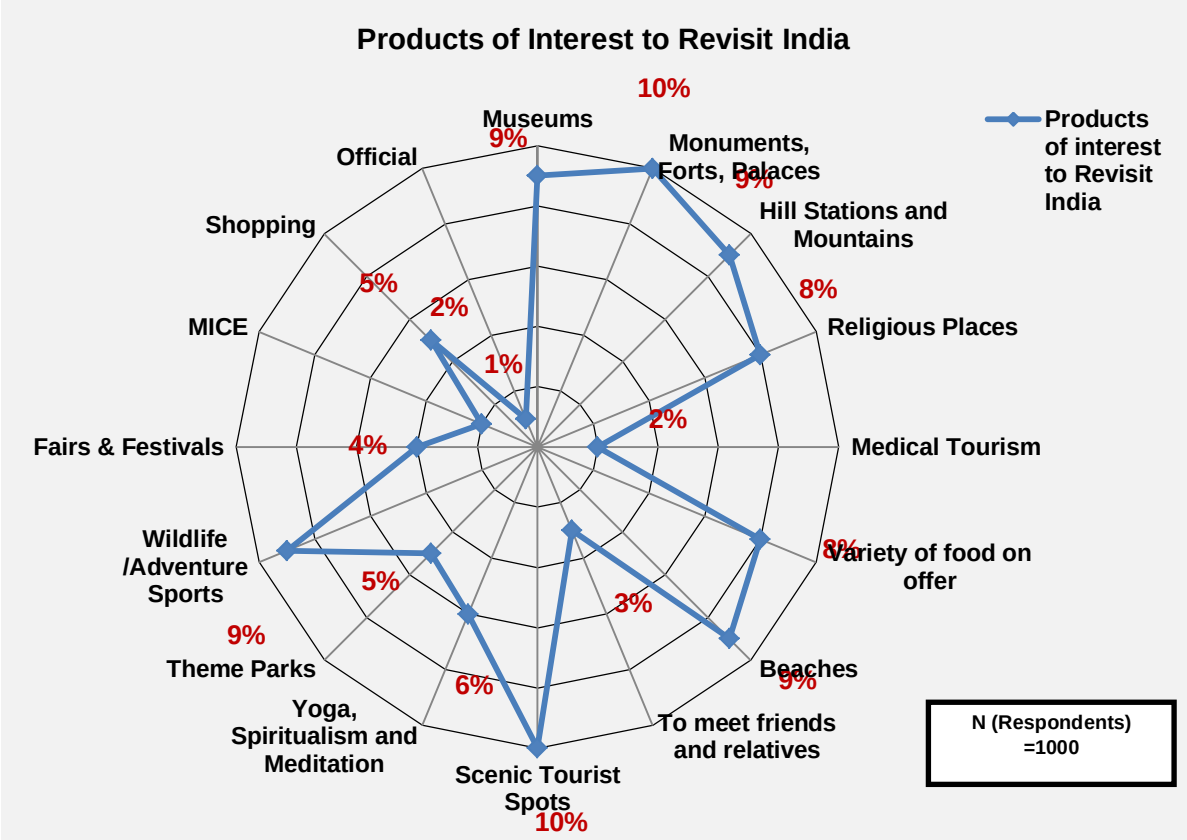
Figure 20: Revisit India



3.1.3.13 Attractions for re-visiting India

Respondents who visited India were asked to indicate attractions that would draw them to India again and they were given the freedom to select multiple options. Of interest to India visitors are its monuments and forts, and scenic tourist places. There are a miniscule number (30 of total responses) who plan to visit India on official purposes and another 115 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 25 persons out of 1000 who did express that they would not be revisiting India, cited problems related to visa issues and high expenses for India as the primary concern. Safety/ security issues were also important concerns cited.

3.1.3.15 Best and worst experiences in India

Tourists from Germany, who have visited India, are very impressed by the infrastructure in India and particularly happy with the food. Those fond of food like India because of the vast cuisine it offers. Respondents who visited India were asked to indicate their best and most enjoyable aspects about coming here and they were given the freedom to select multiple options. The best part of coming to India is cited as infrastructure (14.82% of the responses), food (10.08% of the responses) and nice people (9.94% of the responses).

Figure 22: Top 15 Pleasant Experiences in India

Sources of discomfort or unpleasantness were cited as dirty places and poverty. Many respondents felt beleaguered about animals on roads and cited it as an unpleasant experience. Hygiene standards and traffic were also cited as sources of unpleasantness.

Figure 23: Top 15 Unpleasant Experiences in India

3.1.3.16 Satisfaction from visiting India

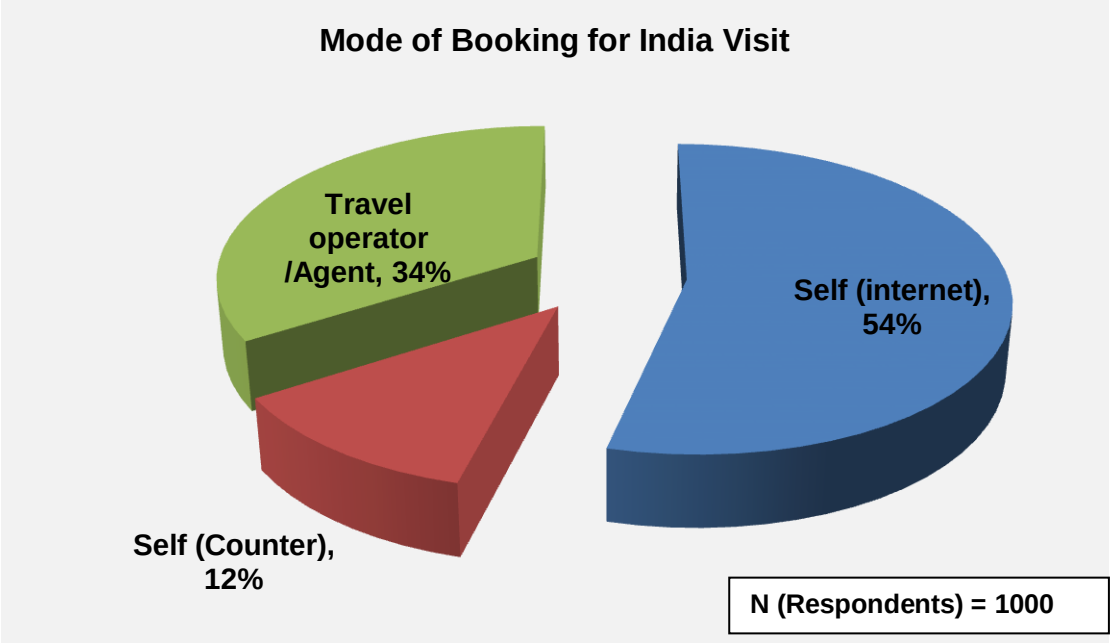
Overall, 48% of the 1000 past travellers to India interviewed in the survey were satisfied with their experience in visiting India and mentioned it was "Excellent". 44% of the respondents rated their India holiday experience as 'Good'.

Figure 24: Satisfaction with Visit to India

3.1.3.17 Mode of booking

Around 54% of the respondents booked their tickets online themselves. Another 34% use travel agents while 12% of the total 1000 respondents booked their tickets themselves over the counter.

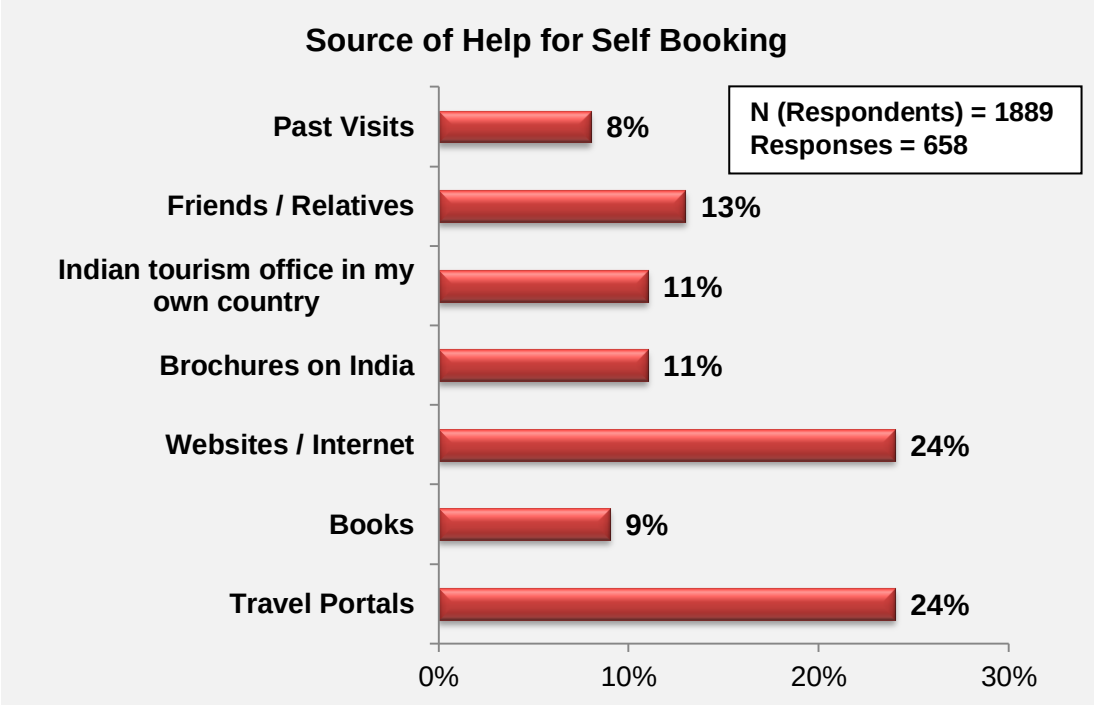
Figure 25: Mode of Booking for India Trip



3.1.3.18 Sources of Help While Self Booking

The 658 respondents who did not consult tour operators were asked to indicate sources of assistance they approached in order to book their tickets for the India trip. 24% of the responses received from internet and 24% from travel portals revealed that the internet was a very important source of information for travellers as well as a powerful tool for sorting out travel modalities. 13% responses showed that on occasion friends and relatives were also consulted.

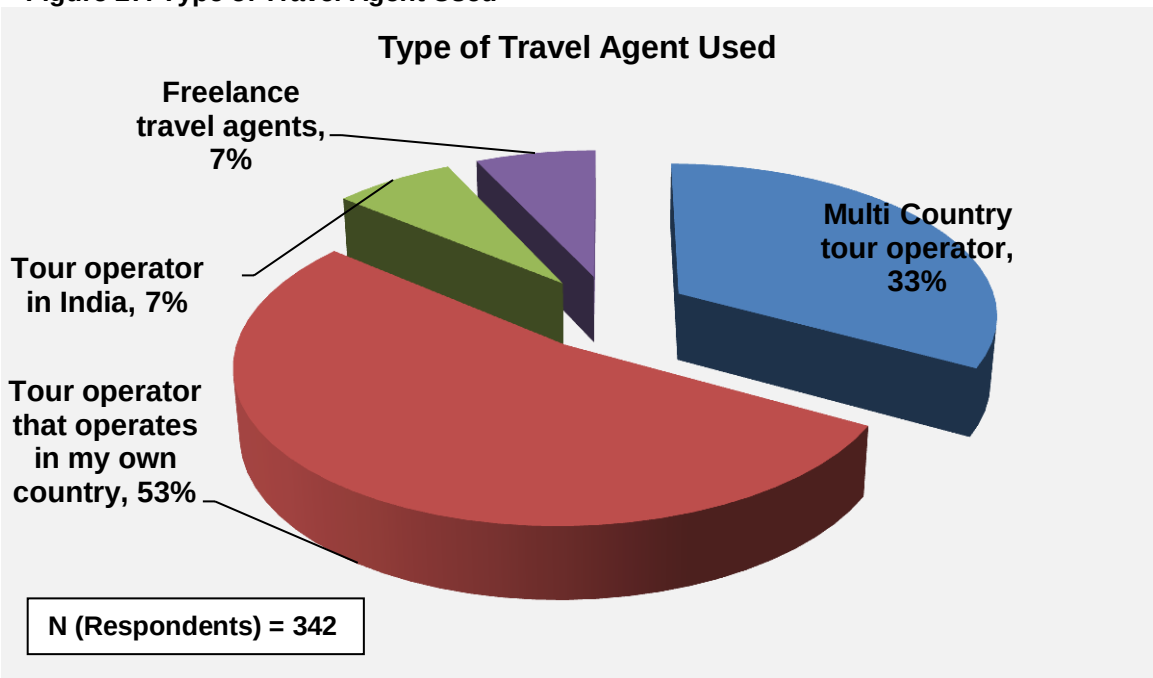
Figure 26: Source of help while self-booking



3.1.3.19 Type of tour operator used

Of the 1000 respondents who travelled to India in the past, 342 respondents consulted tour operators. These persons were asked to reveal information about the type of tour operator consulted and multiple responses were received. It was found that in 53% of the cases these are operators from the Germany. In 33% cases multi-country tour operators are also consulted. But consultation with Indian tour operators is lower at 7%.

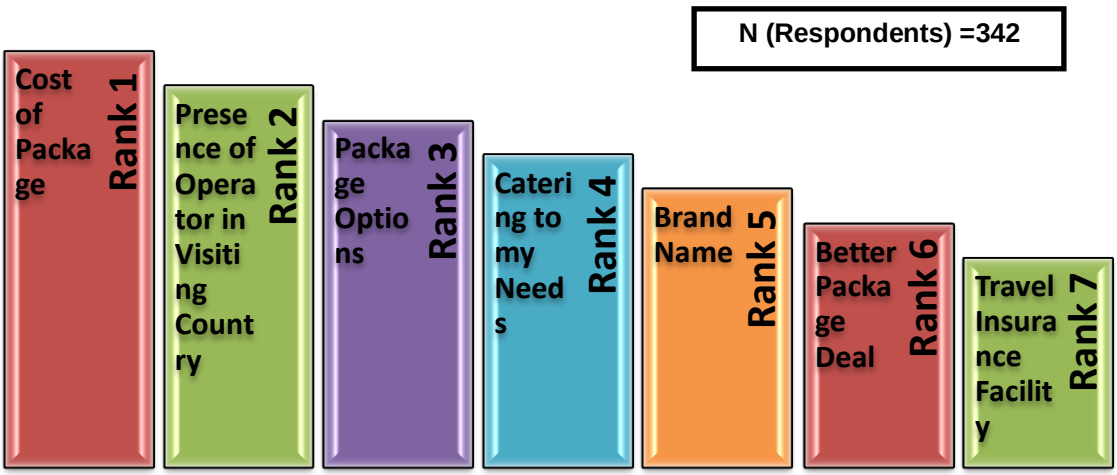
Figure 27: Type of Travel Agent Used



3.1.3.20 Tour operators selection criteria

In the choice of the tour operator, for these 342 respondents, the cost of the package offered were the key deciding factor followed by presence of tour operator in visiting country and catering to the needs of the travellers.

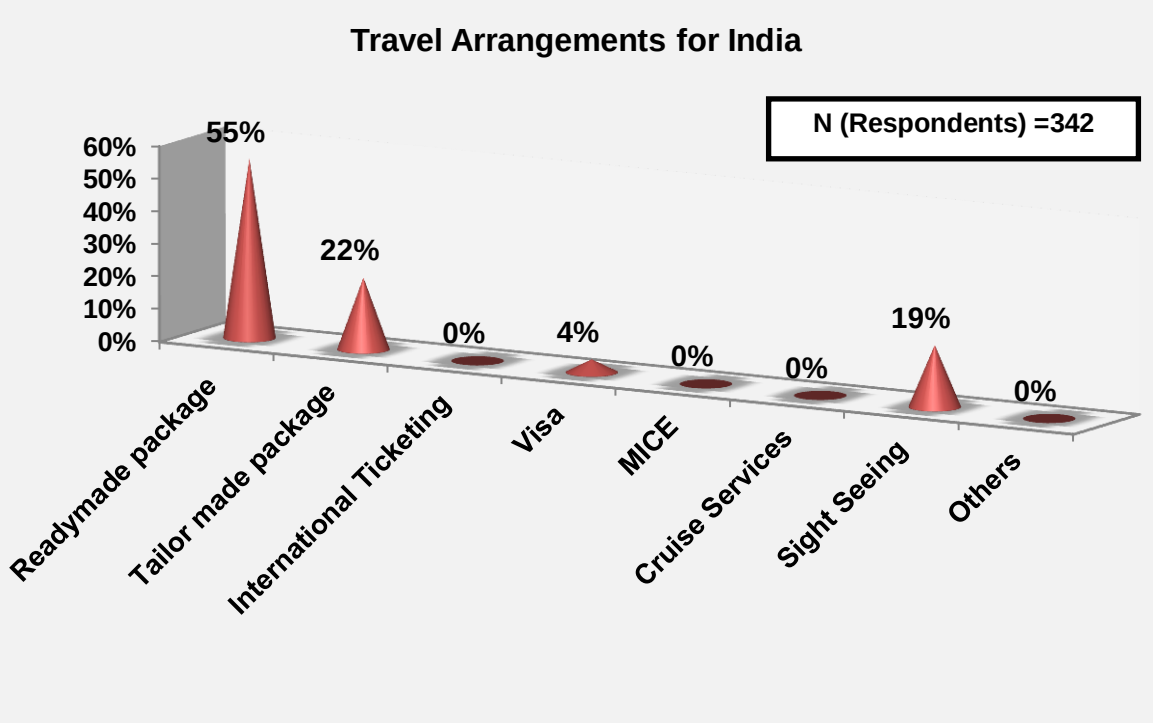
Figure 28: Tour Operators Selection Criteria



3.1.3.21 Travel Arrangements for India

The 342 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 (55% out to total 342 respondents) travellers opted for travel arrangement through tour operators 22% out of the total 342 respondents mentioned that tailor made package was the travel arrangement they chose.

Figure 29: Travel Arrangements for India

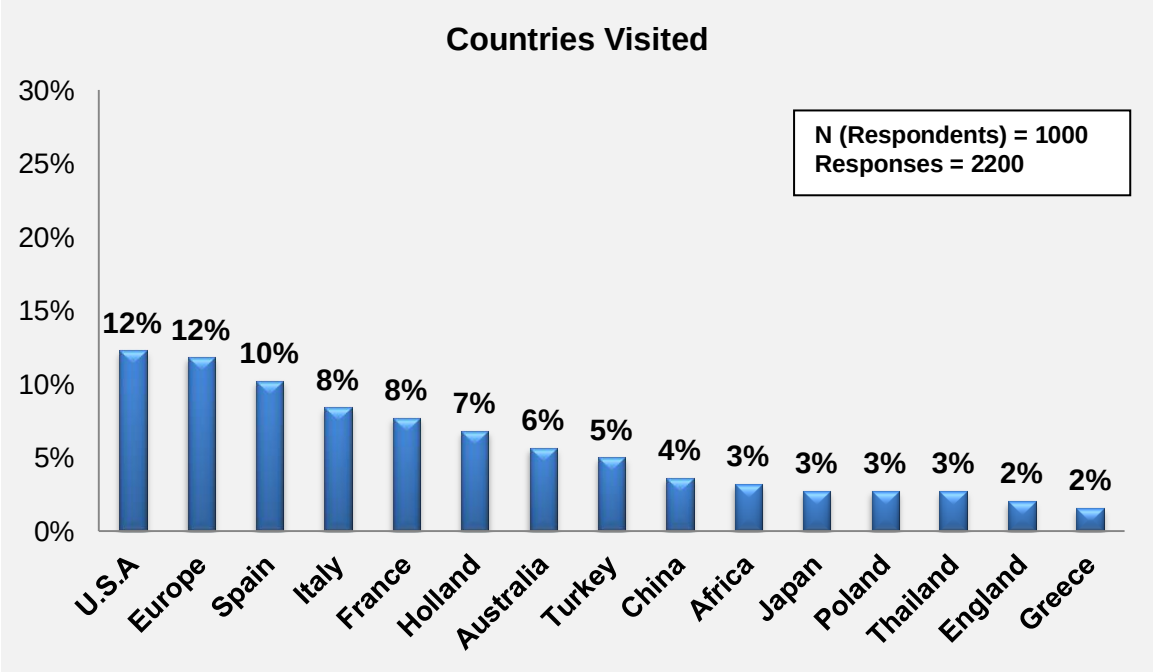

Travel Arrangements for India
N (Respondents) =342
60%
50%
40%
30%
20%
10%
0%
55%
22%
0%
4%
0%
0%
19%
0%
Readymade package
Tailor made package
International Ticketing
Visa
MICE
Cruise Services
Sight Seeing
Others

3.1.4 Travel Behaviour of Past Visitors to Other Countries

3.1.4.1 Countries Visited in past

Among the 1000 respondents who had travelled out of Germany in the past one year but not to India, the maximum visits have been made to USA followed by Europe, Spain, Italy and France. These top countries constituted 87% of all responses.

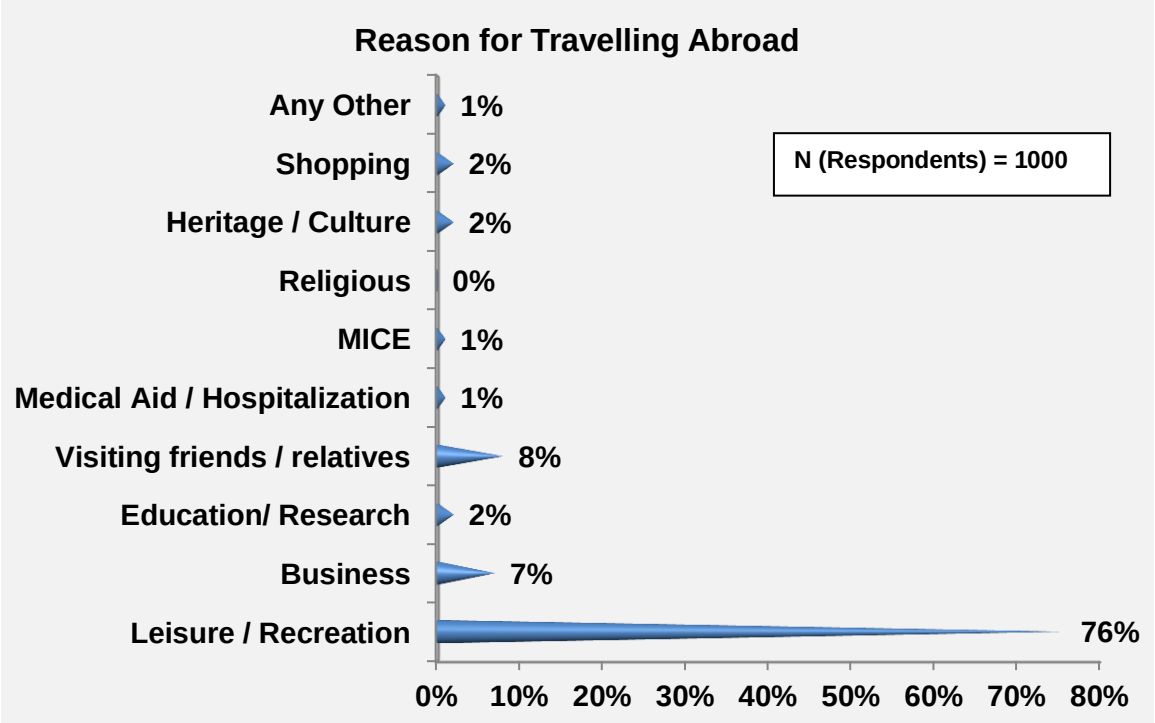
Figure 30: Countries Visited



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 (76% of total 1000 respondents); while some other factors were to visit friends and relatives (8% of total 1000 respondents) or business (7% of all responses).

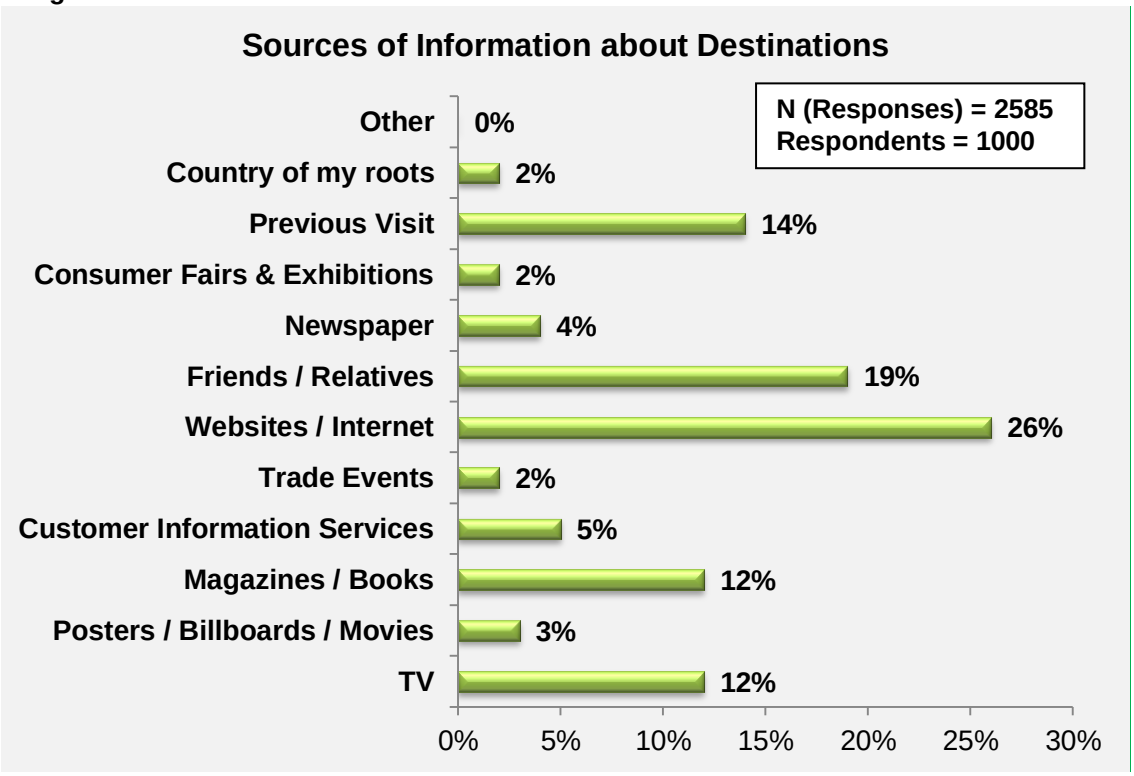
Figure 31: Reason for Travelling Abroad



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. 1000 respondents yielded 2585 responses. A large number of travellers have found out about the destination countries in most cases from the internet or websites (26% 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% of all responses). Previous visits were also cited as sources of information (14% of all responses)

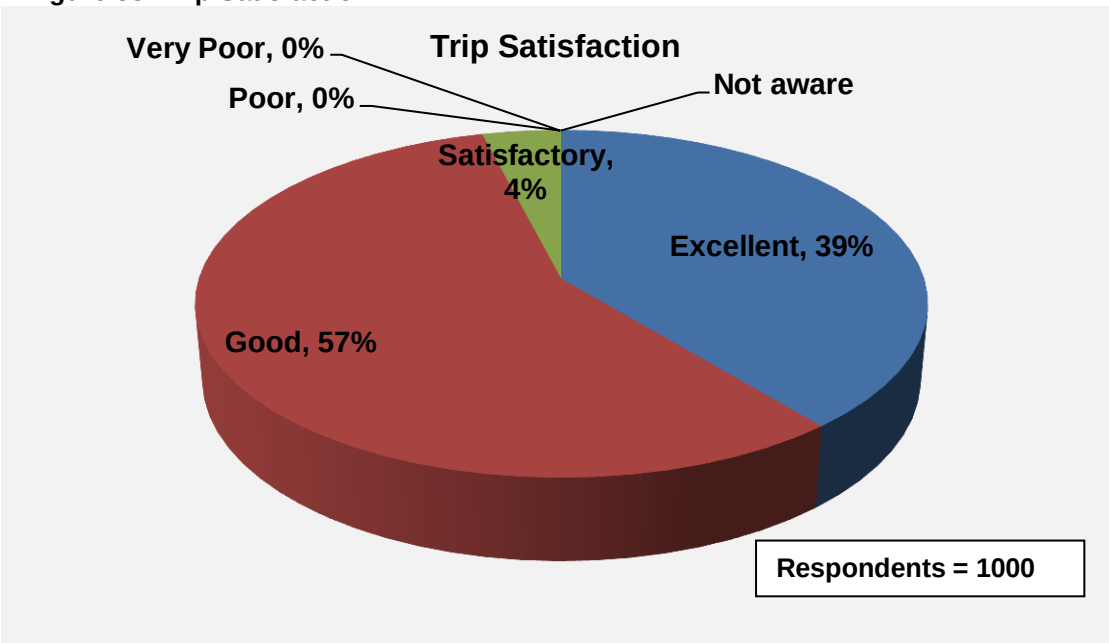
Figure 32: Sources of Information about Destinations Visited



3.1.4.4 Trip Satisfaction

An overwhelming 96% of the respondents believed that their experience had been good to excellent.

Figure 33: Trip Satisfaction



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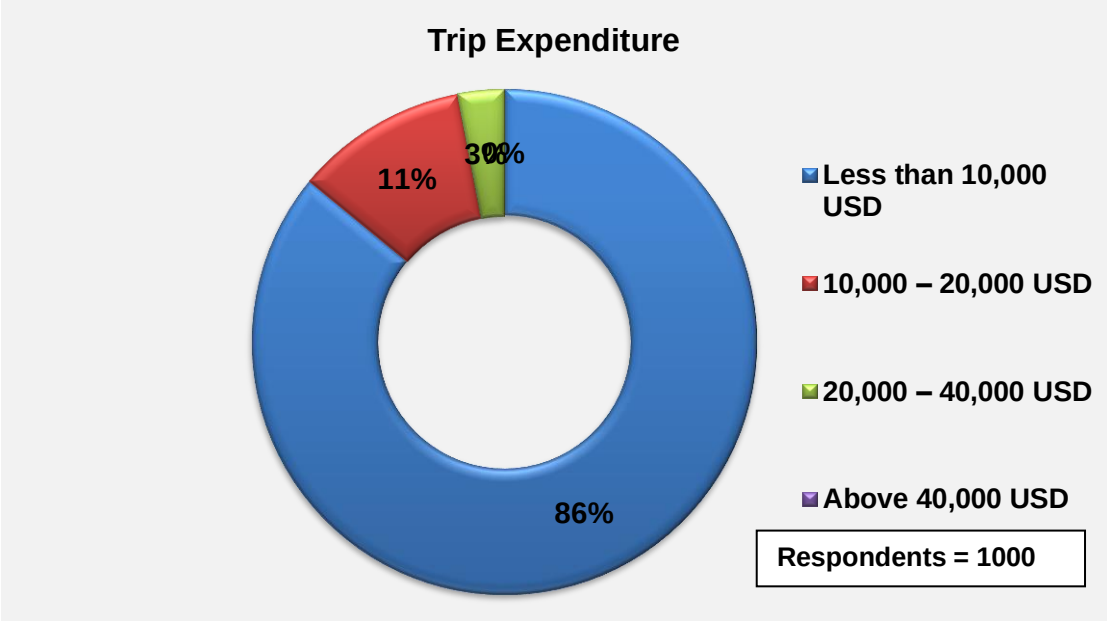
3.1.4.5 Trip Expenditure

An overwhelming 86% of the respondents spent less than USD 10,000 for their entire trip in total.

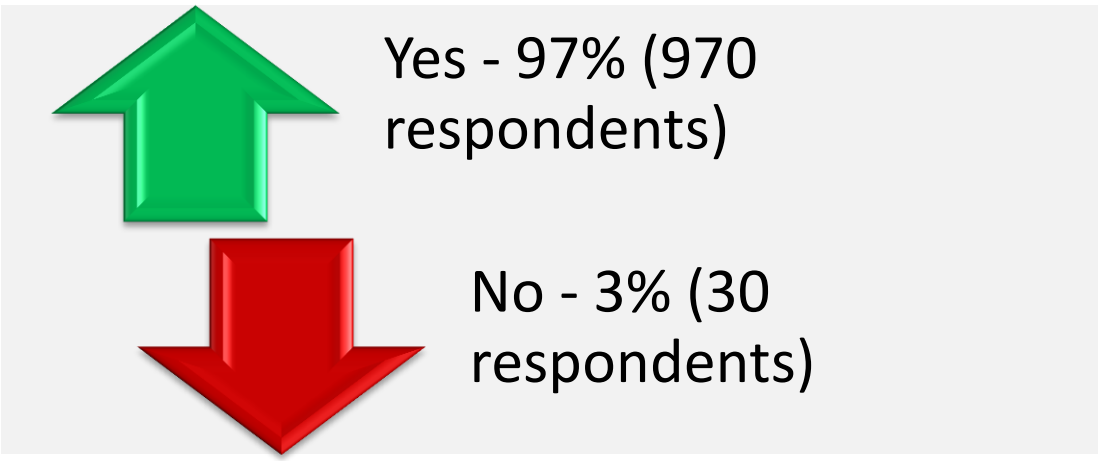
Figure 34: Trip Expenditure



3.1.4.6 Value for money destinations visited

An overwhelming 97% of the respondents out of the total 1000 respondents believed that their experience had been worth the money they spent.

Figure 35: Value for Money Destination

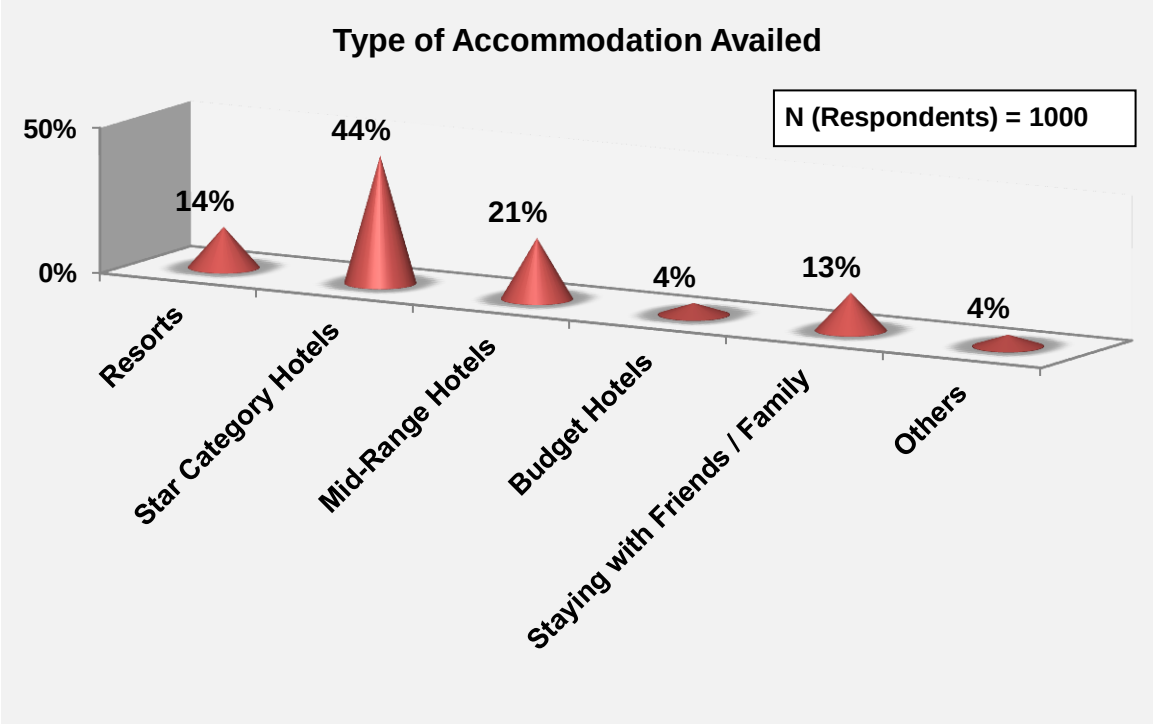


3.1.4.7 Type of accommodation used

About 44% of all 1000 respondents who travelled to countries other than India stayed in star hotels during their visit. 4% stayed in budget hotels while about

13% stayed with friends and relatives. 21% of the 1000 respondents spent on mid-range hotels.

Figure 36: Type of Accommodation Availed

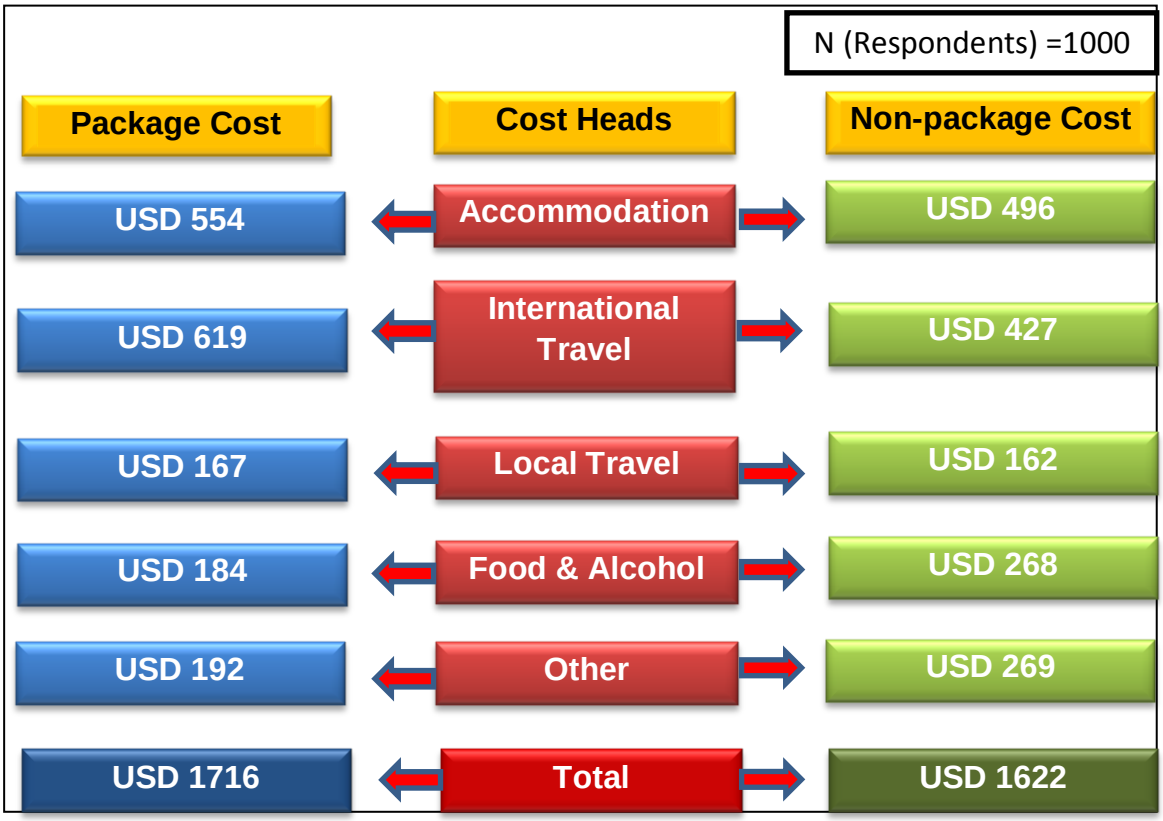


Note: Star category hotels: Hotels with more than 5 stars; Mid-ranged hotels: Hotels lying in the bracket of 3-4 stars; Budget hotels: Hotels lying in the bracket of 1-2 stars

3.1.4.8 Package and Non-package Expenses Incurred

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

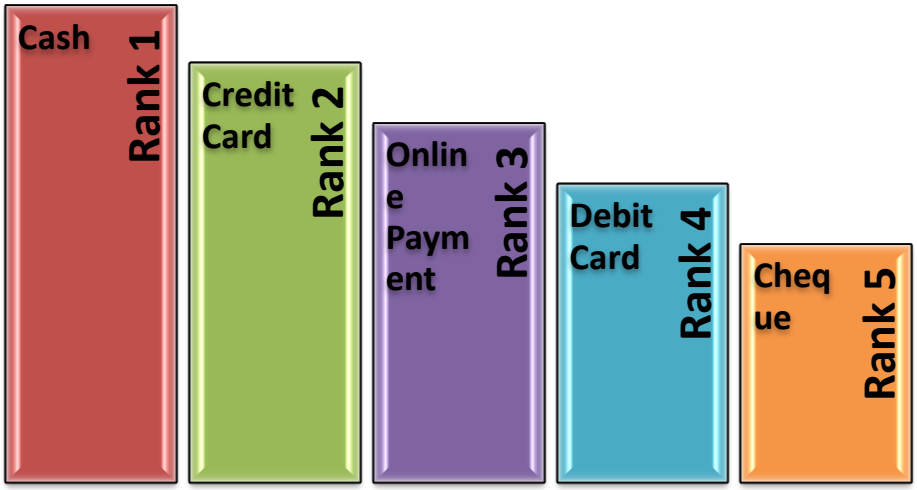
Figure 37: Package and Non-package Expenses



3.1.4.9 Mode of Payment

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

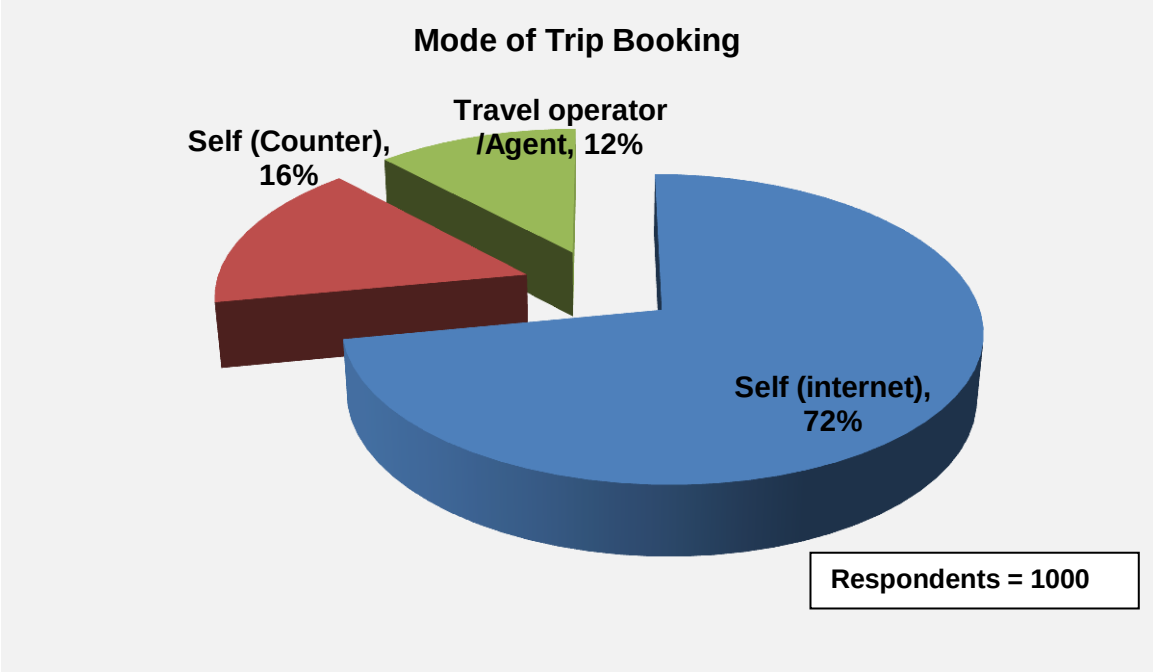
Figure 38: Mode of Payment



3.1.4.10 Mode of Trip Booking

About 88% of all 1000 respondents who travelled to countries other than India booked their trips themselves.

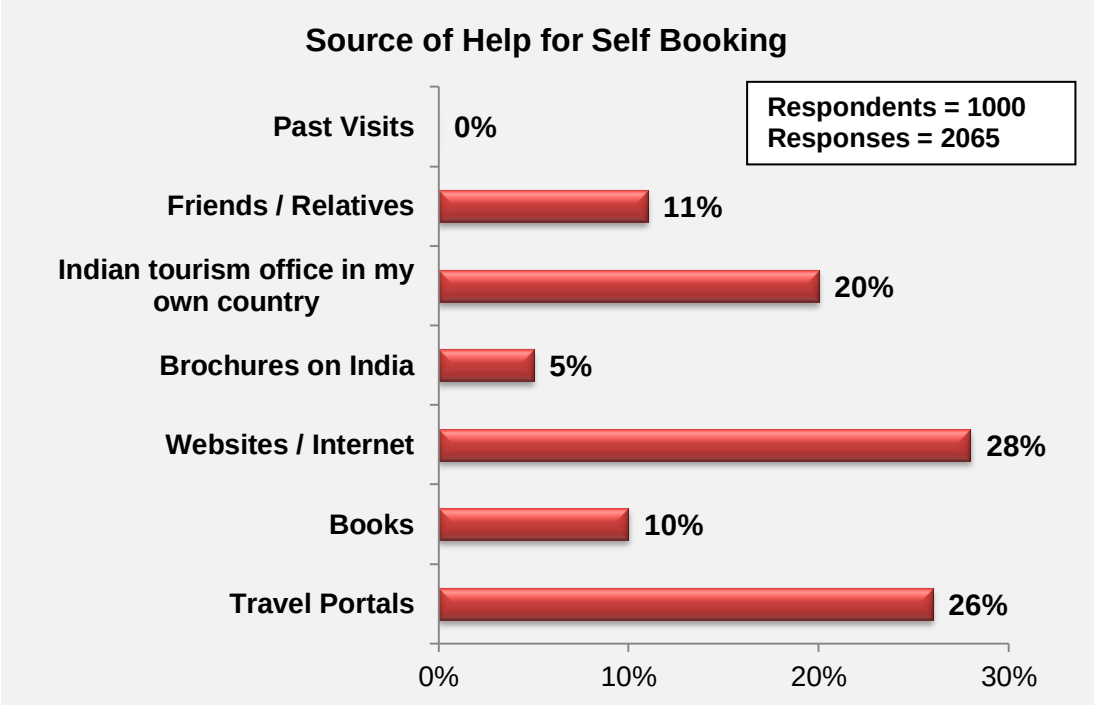
Figure 39: Mode of Trip Booking



3.1.4.11 Help While Self Booking for Trip

The 1000 respondents, who travelled to countries other than India doing their own booking, were asked about their source of help for their trip booking and were given the multiple options.2065 responses, were received from the 1000 respondents and 28% of responses indicated that the major source of help was websites/ internet.

Figure 40: Source of Help for Self Booking



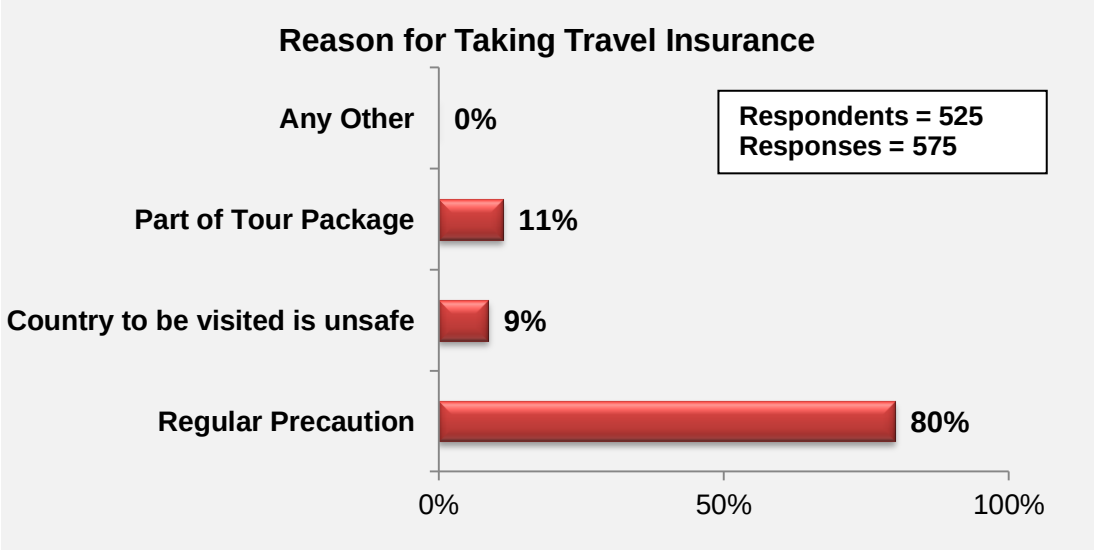
3.1.4.12 Travel Insurance Availed

About 52.5% of total 1000 respondents who travelled to countries other than India availed travel insurance for their trip.525 respondents opted for travel insurance while 475 respondents (47.5% of 1000 respondents) did not opt for travel insurance.

3.1.4.13 Reason for Taking Travel Insurance

About 80% of 525 respondents who availed travel insurance mentioned that they took it just for regular precaution.

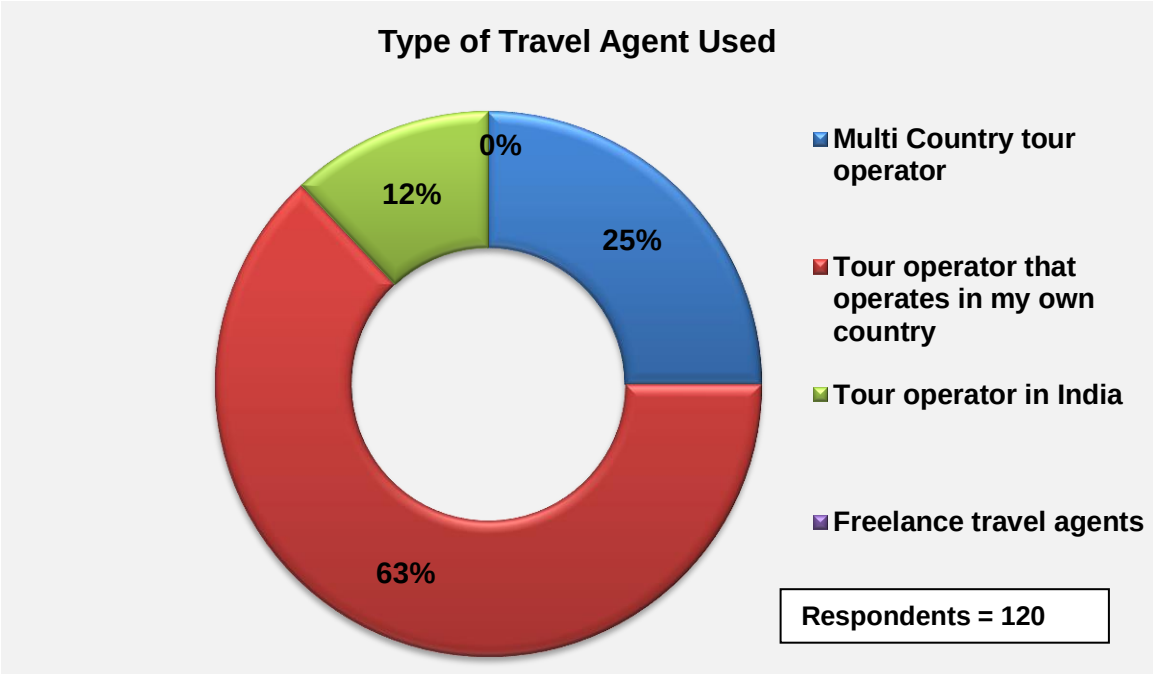
Figure 41: Reason for Taking Travel Insurance



3.1.4.14 Type of Travel Agent Used

About 63% of the total of 120 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.

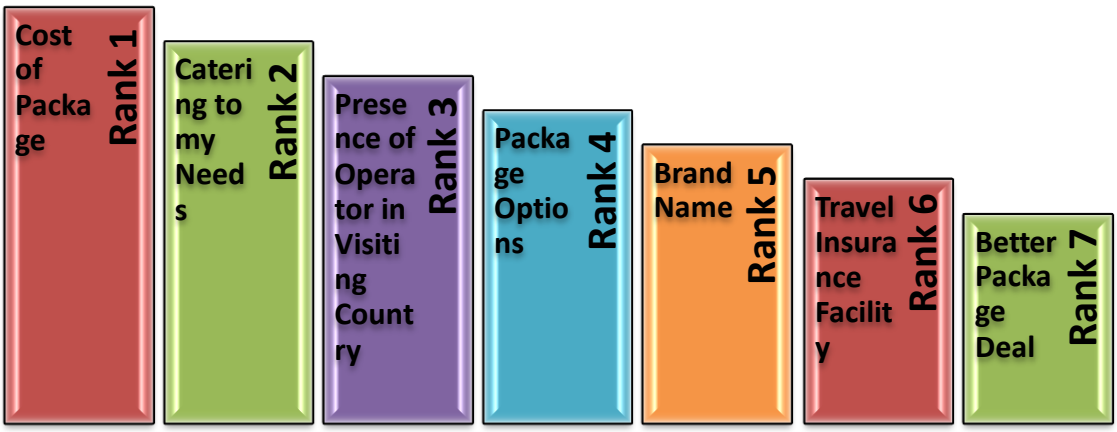
Figure 42: Type of Travel Agent Used



3.1.4.15 Selection Criteria of Tour Operators

The 120 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.

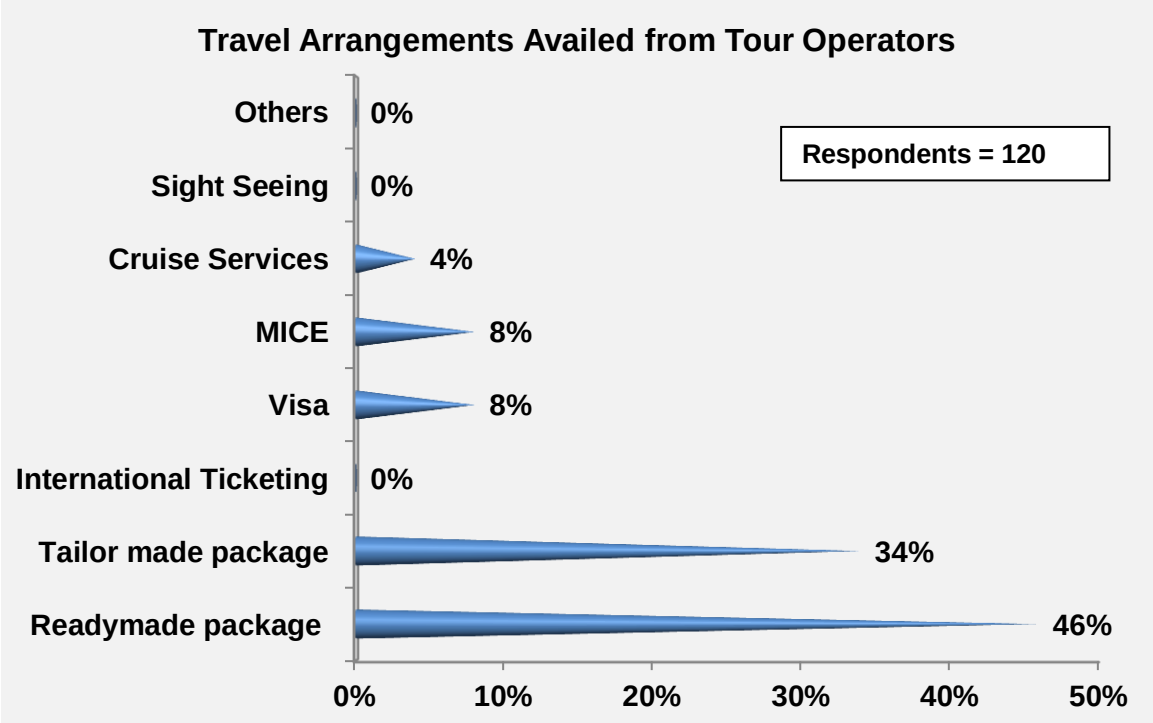
Figure 43: Selection Criteria of Tour Operators



3.1.4.16 Travel Arrangements Availed from Tour Operators

The 120 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. 46% of the total of 120 respondents mentioned that a readymade package was the arrangements availed from the tour operator.

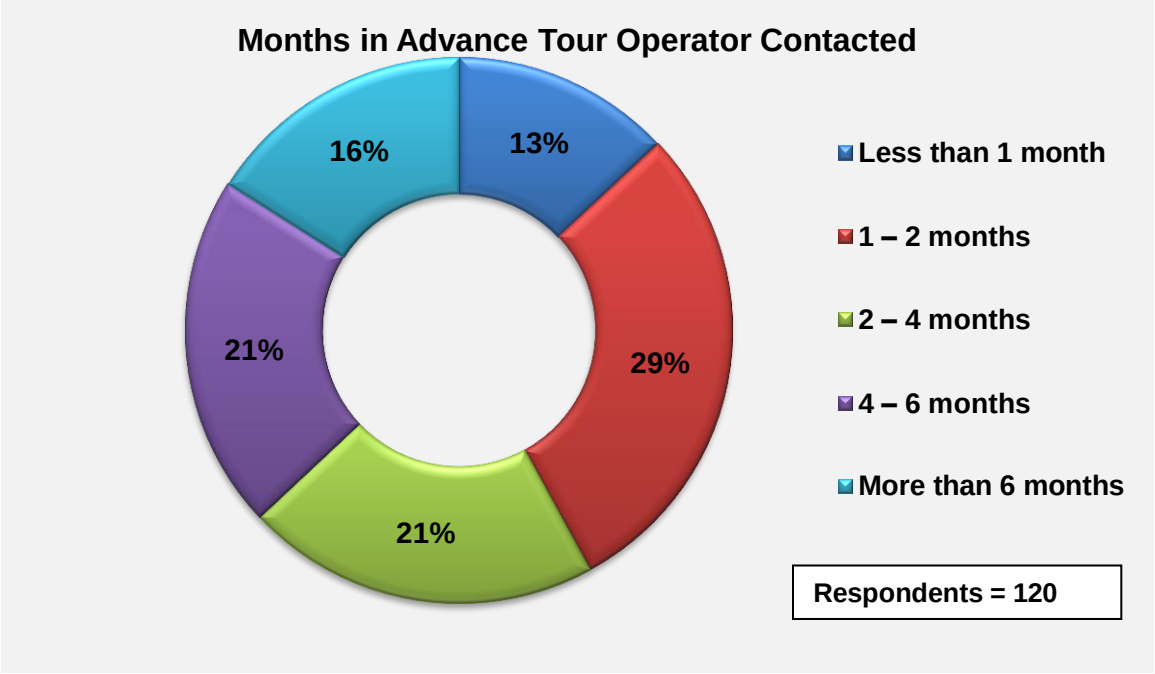
Figure 44: Travel Arrangements Availed from Tour Operators



3.1.4.17 Months before Contacted Tour Operator

The 120 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. 29% of the total of 120 respondents mentioned that they contacted the tour operator around 1 to 2 months in advance.

Figure 45: Months in Advance Tour Operators Contacted



3.1.4.18 Awareness of India as a tourist destination

About 14.5% of all 1000 respondents who had visited other countries in the last one year were aware of India as a tourist destination.

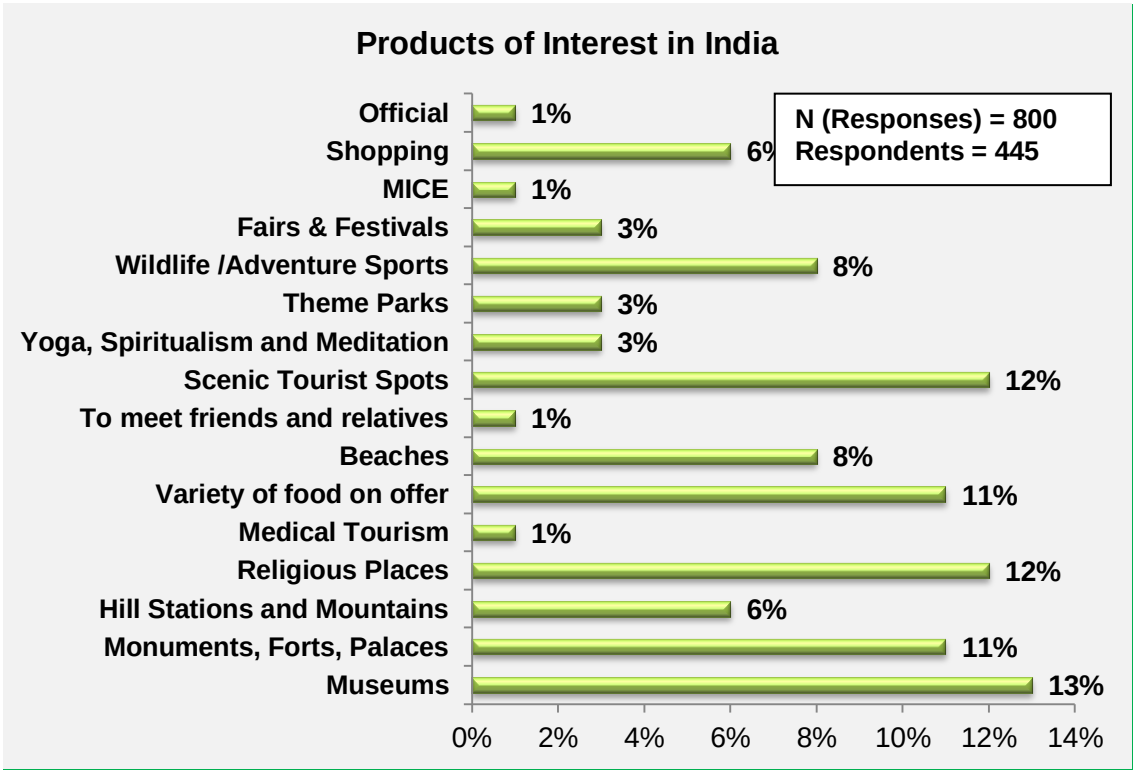
3.1.4.19 Intention of visiting India

Though 14.5% of the respondents (145 respondents) were aware of India as a tourist destination, about 44.5% of the total 1000 respondents expressed interest in visiting India during their next trip.

3.1.4.20 Primary attractions of India / motivation for visiting India

The 445 respondents who indicated that they would like to visit India on their next trip were asked what their primary attractions in India were (multiple options could be chosen). 4185 responses were received from 800 respondents in response to this question. Most respondents admitted that they found India attractive for its Museums (13% of 800 responses).

Figure 46: Products of Interest in India

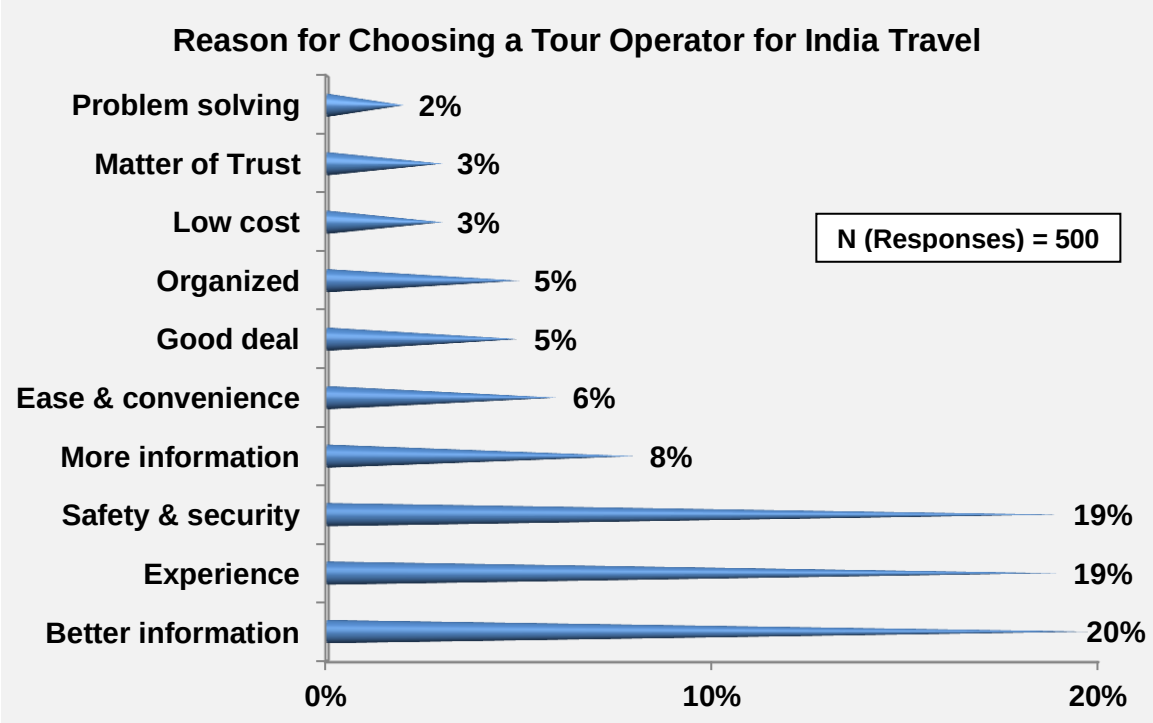


3.1.4.21 Intention and reason for choosing an intermediary for India travel

All the 1000 respondents, who had travelled to countries other than India in past, were asked that if they ever decide to travel to India, would they plan their trip on their own or through a travel operator. 49% of the respondents showed inclination to consult a tour operator and 51% 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. 20% of responses showed that the travellers would like to approach tour operators for the better information that they possess. About 19% of the responses were in favour of experience that a tour operator would provide.

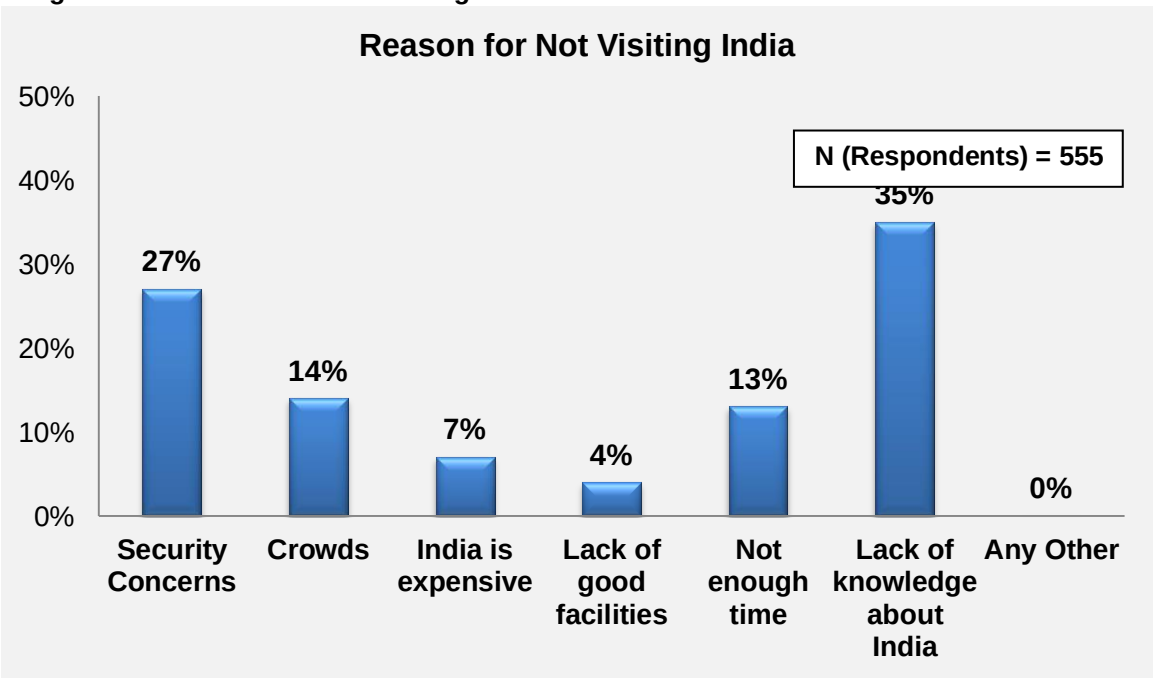
Figure 47: Reason for Approaching Tour Operators



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

Among those who were not interested in visiting India (555 of 1000 respondents), the primary concern that proved a dampener was lack of knowledge about India (35% of the 555 respondents received in this context).

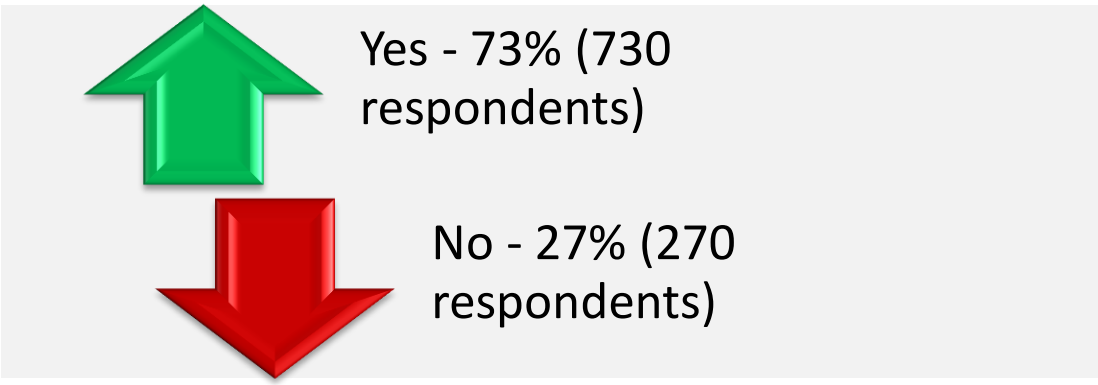
Figure 48: Reasons for Not Visiting India in Future



3.1.4.23 Visit India Ever

All 1000 past travellers from Germany to countries other than India were asked if they would ever visit India and 73% of the 1000 respondents stated that they would visit India. 27% respondents out of 1000 past travellers to other countries responded in the negative on ever travelling to India.

Figure 49: Visit India Ever



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

3.1.5.1 Accommodation Availed by Past Travellers

Among past travellers who headed to India, a large percentage (22%) stayed in resorts whereas travellers who headed to other countries, 14% stayed in resorts.

Table 14: Accommodation Availed by past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
22%	Resorts	14%
32%	Star Category Hotels	44%
30%	Mid-Range Hotels	20%
9%	Budget Hotels	4%
6%	Staying with Friends / Family	14%
1%	Others	4%

3.1.5.2 Package Expenses of Past Travellers

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

Table 15: Package expenses of Past Travellers – India vs. Other Country

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
815	Accommodation	554
925	International Travel	619
427	Local Travel	167
395	Food including alcohol	184
333	Others	192
2895	Total	1716

3.1.5.3 Non-Package Expenses of Past Travellers

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

Table 16: Non-Package Expenses of Past Travellers – India vs. Other Country

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
585	Accommodation	496
806	International Travel	427
352	Local Travel	162
322	Food including alcohol	268
278	Others	269
2343	Total	1622

3.1.5.4 Preferred Mode of Payment of Past Travellers

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

Table 17: 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	3
2	Credit Card	2
3	Debit Card	4

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.

Table 18: Trip Satisfaction of past Travellers – India vs. Other Country

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
48%	Excellent	39%
44%	Good	57%
6%	Satisfactory	4%
1%	Poor	0%
1%	Very Poor	0%

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).

Table 19: Mode of Trip Booking of Past travellers – India vs. Other Country

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
54%	Self (Internet)	72%
12%	Self (Counter)	16%
34%	Travel Operator /Agent	12%

3.1.5.7 Source of Booking Information for Past Travellers

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

Table 20: Source of Booking Information for Past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
24%	Travel Portals	26%
9%	Books	10%
24%	Websites / Internet	28%
11%	Brochures on Country	5%
11%	Country Tourism office in my own country	20%
13%	Friends / Relatives	11%
8%	Past Visits	0%

3.1.5.8 Type of Travel Agent Used by Past Travellers

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

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

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
33%	Multi Country tour operator	25%
53%	Tour operator that operates in my own country	63%

7%	Tour operator in India	12%
7%	Freelance travel agents	0%

3.1.5.9 Type of Travel Arrangements Used by Past Travellers

Among past travellers who headed to India, a large percentage (19%) sought sight-seeing arrangements from tour operators whereas travellers who headed to other countries, none of them sought tailor made package as travel arrangements from tour operators.

Table 22: Type of Travel Arrangements Used by Past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
55%	Readymade package	46%
22%	Tailor made package	34%
0%	International Ticketing	0%
4%	Visa	8%
0%	MICE (Meeting, Incentives, Conventions, Exhibitions)	8%
0%	Cruise Services	4%
19%	Sight Seeing	0%
0%	Others	0%

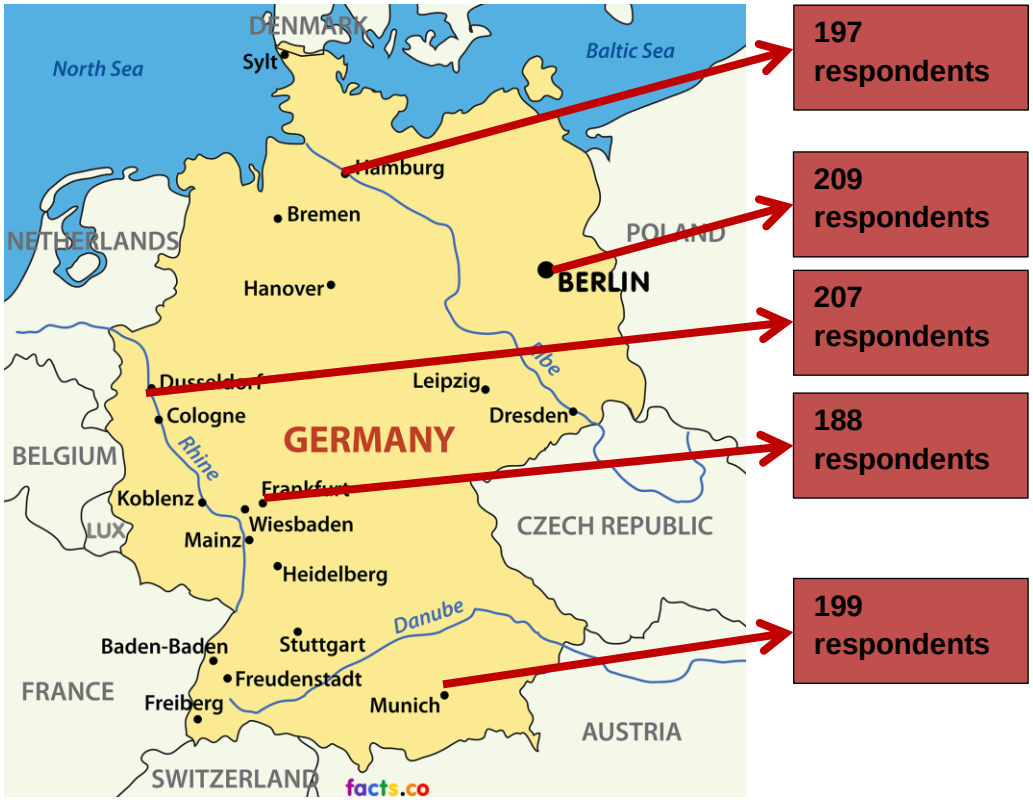
4.1 Prospective Outbound Travel Behavior

4.1.1 Profiling Information

4.1.1.1 Place of residence

The survey investigated 1000 respondents (persons who are intending to travel abroad) from Germany of which 21% of the travellers each were from Berlin and Dusseldorf, 18% from Frankfurt and 20% each from Hamburg and Munich.

Figure 50: Distribution of Past Travellers by Place of Residence



Map Source: www.Germanymap.facts.co

4.1.1.2 Gender Distribution

Women constituted only 16% of the total 1000 survey participants of intending travellers from Germany. Overall, 162 prospective female travellers were interviewed during the primary survey across the 5 cities.

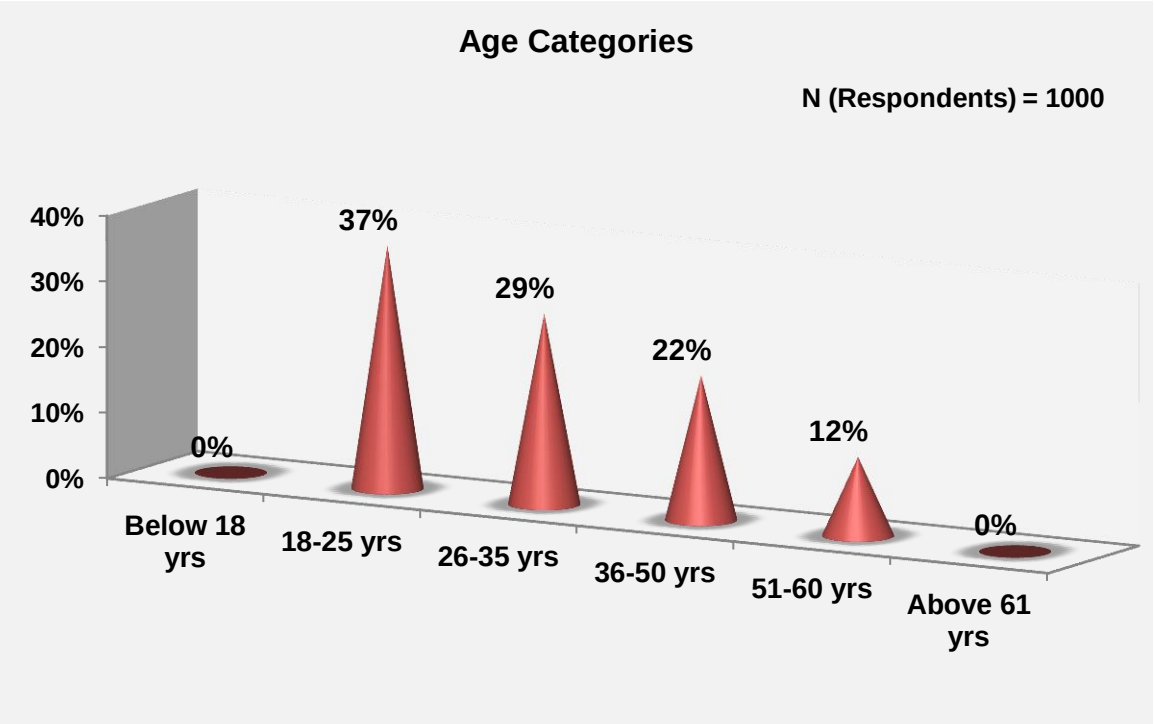
Table 23 Respondents by gender

Gender	No. of respondents	Percentage
Male	838	84%
Female	162	16%
Total	**1000**	**100%**

4.1.1.3 Age categories

29% of the respondents were between 26 to 35 years of age. 22% of the respondents were in the age group of 36 to 50 years. Overall, 51% of the respondents were in their peak productive years between 26 and 50 years of age.

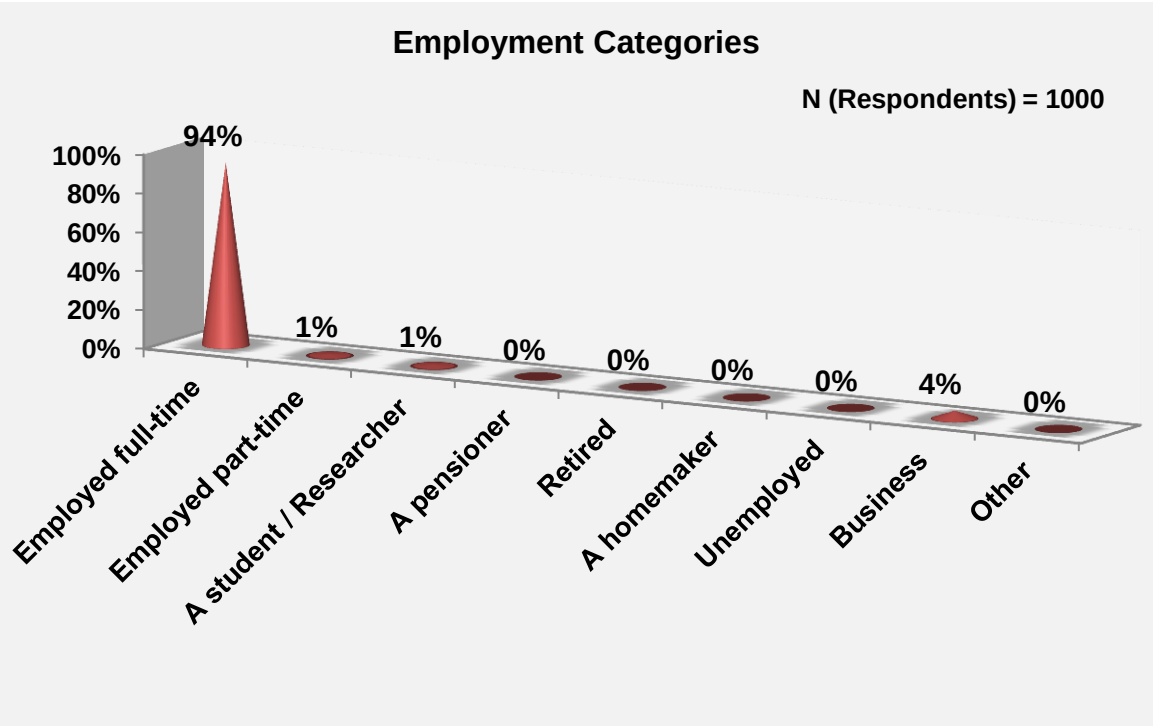
Figure 51: Age Categories



4.1.1.4 Employment status

94% of the total 1000 respondents were employed full time.

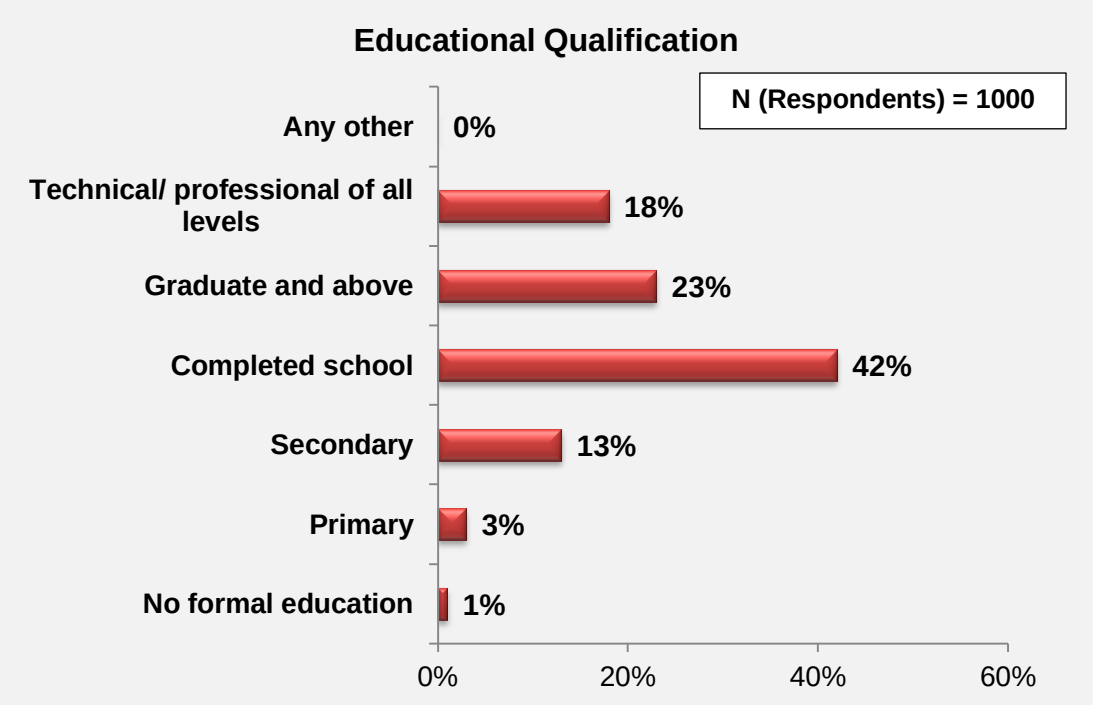
Figure 52: Employment Categories



4.1.1.5 Educational Qualifications

About 41% of the 1000 respondents were at least graduates or had some technical or professional qualification. So overall, the respondent universe was well-educated and aware.

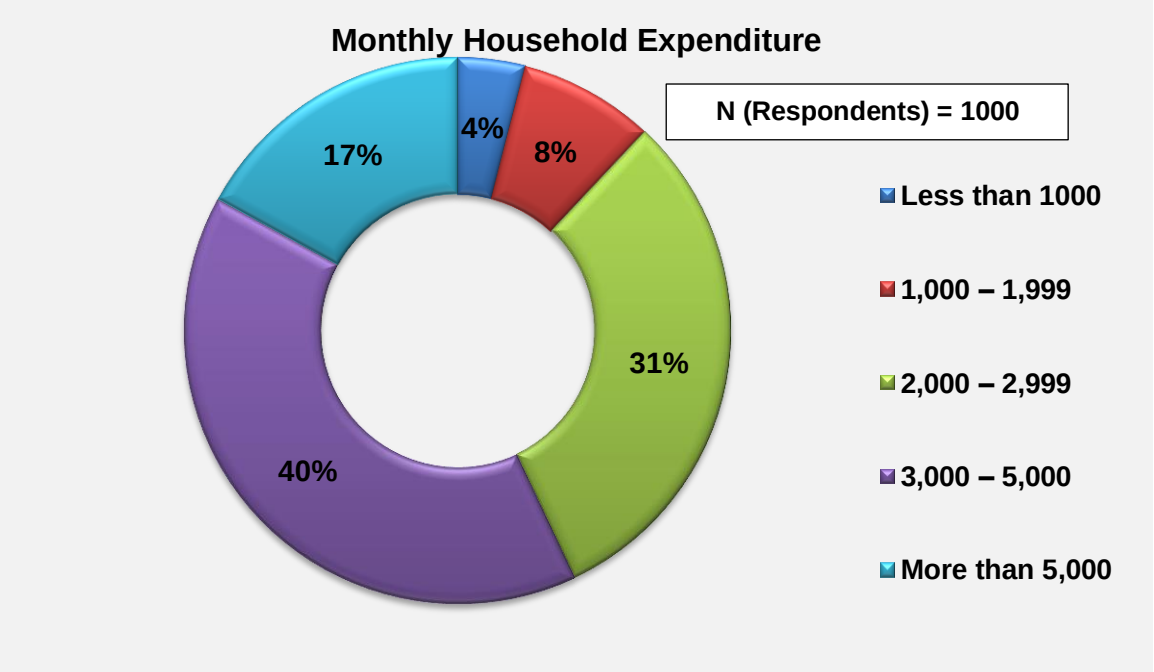
Figure 53: Educational Qualification



4.1.1.6 Household Expenditure per month

17% of the respondents mentioned that their monthly household expenditure was more than USD 5000.

Figure 54: Monthly Household Expenditure

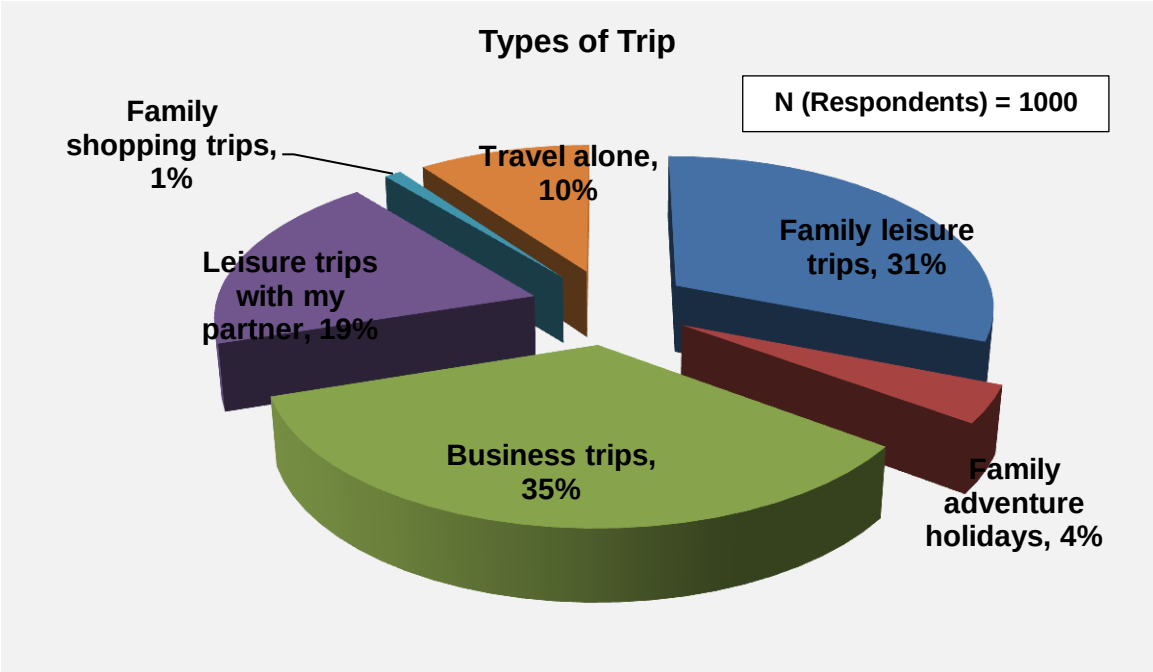


4.1.2 General Travel Behaviour

4.1.2.1 Types of trip

Majority of the respondents, 35%, wish to primarily go on business trips. A considerable section also intends to go for family leisure trips (31% of 1000 respondents).

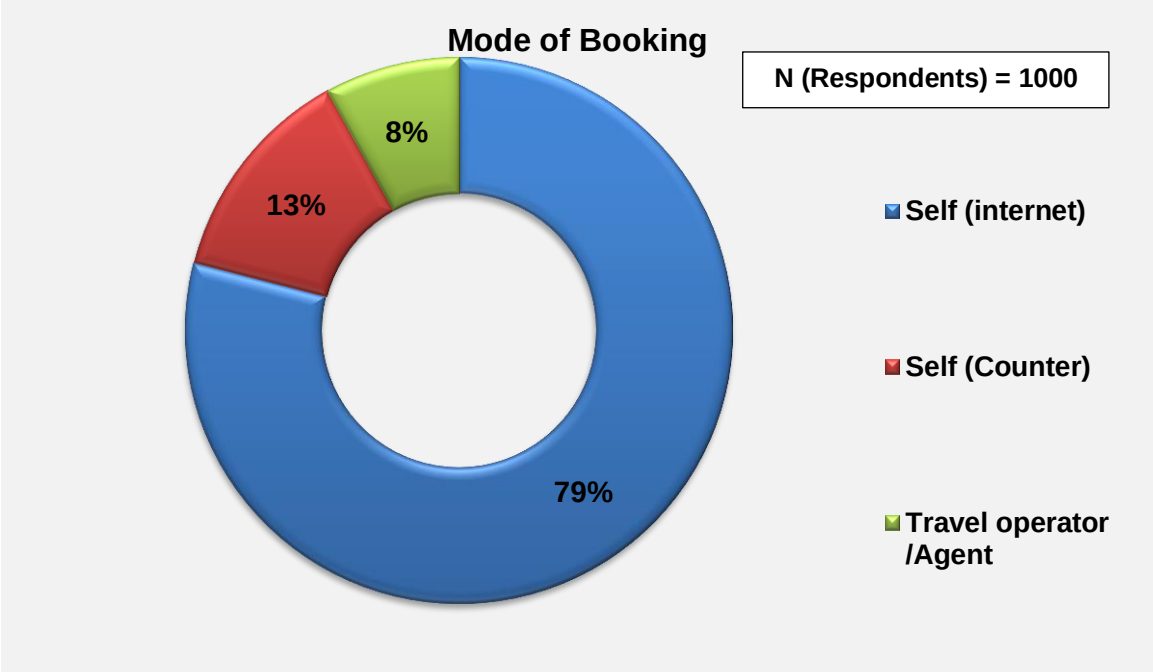
Figure 55: Respondents by purpose of travel



4.1.2.2 Mode of booking

79% of 1000 respondents mentioned that they would book their tickets over the internet while 8% expressed the intention of approaching travel agents. 13% of the 1000 respondents said that they would book their tickets themselves at the counter.

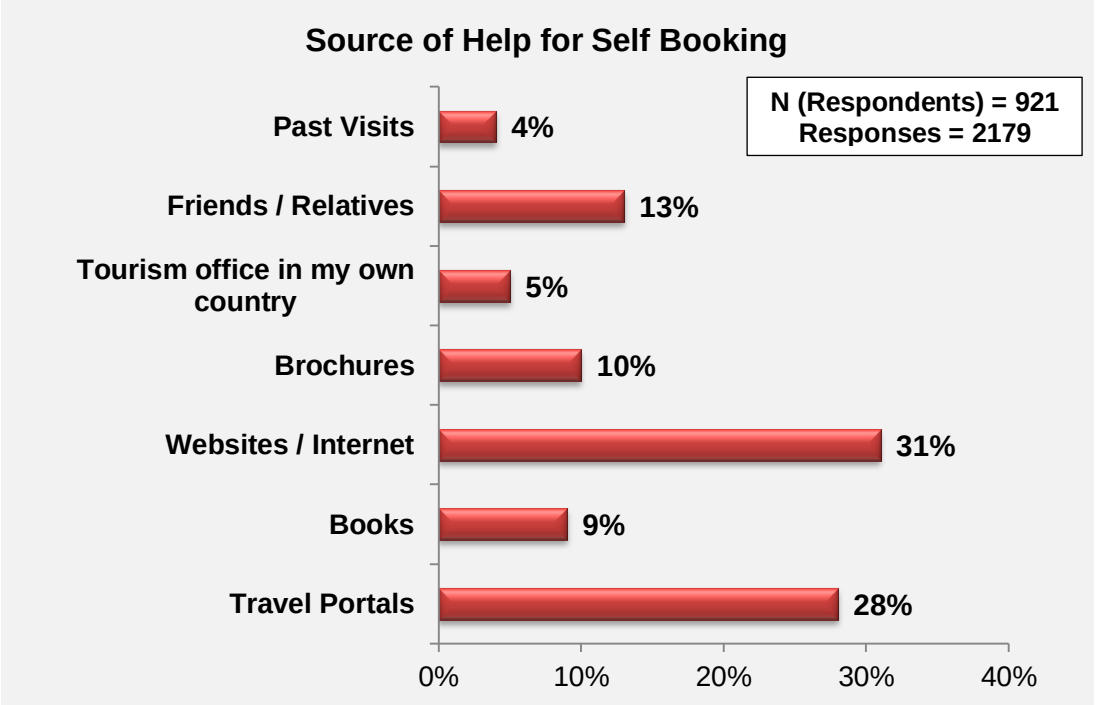
Figure 56: Mode of Booking



4.1.2.3 Sources of help for booking information

The 921 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). 31% of the 2179 responses received revealed that the websites and internet was a very important source of information for travellers as well as a powerful tool for sorting out travel modalities. 13% responses showed that on occasion friends and relatives could also be consulted.

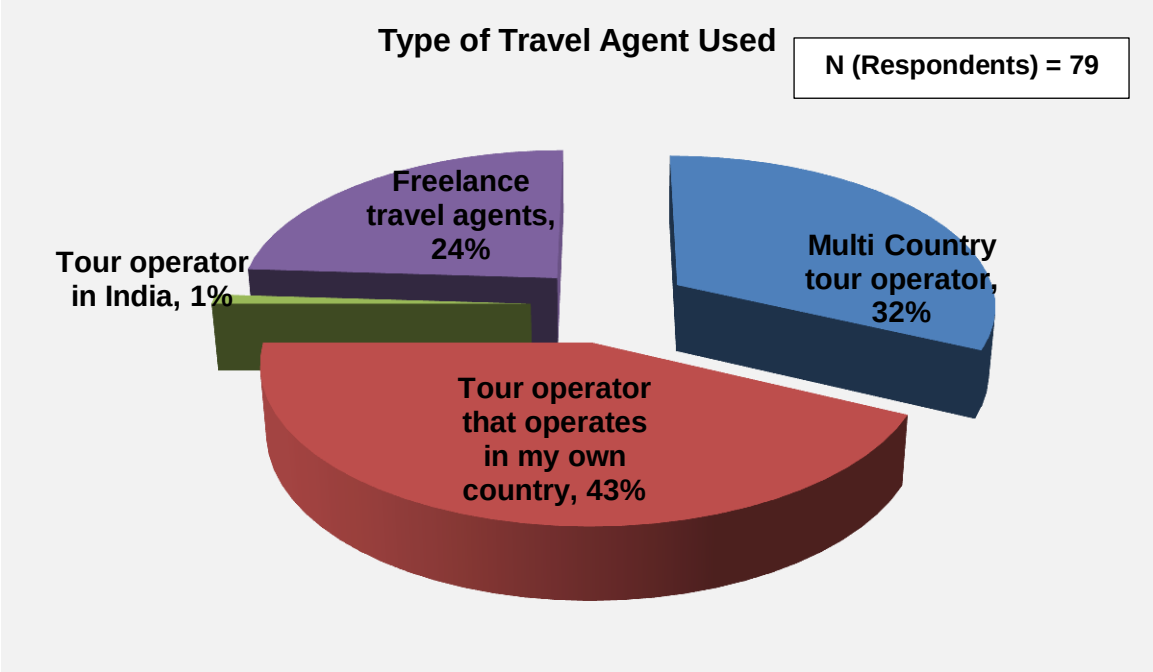
Figure 57: Sources of booking information



4.1.2.4 Type of tour operator used

Among those intending to approach tour operators for ticketing assistance, 43% said that they would approach operators from their own country. Another 32% were willing to approach multi-country operators. Only 1% mentioned that they would approach tour operators from India.

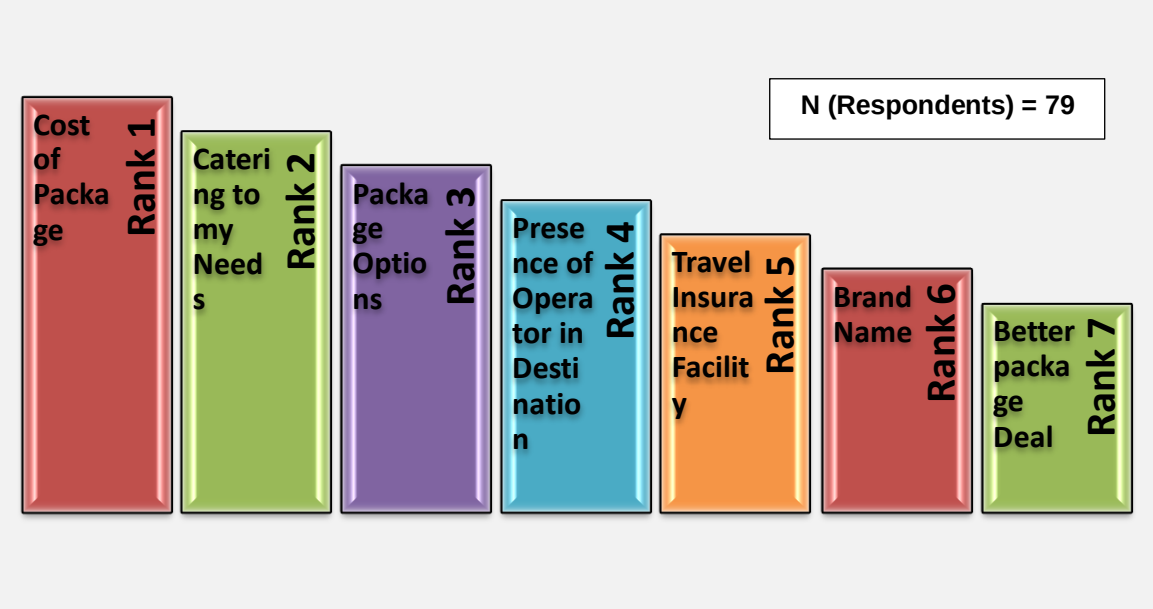
Figure 58: Type of Travel Agent Used



4.1.2.5 Tour operators selection criteria

For these 79 respondents, the cost of package was an important decision point in selecting the tour operator. This was followed by how much the operator catered to the traveller's needs.

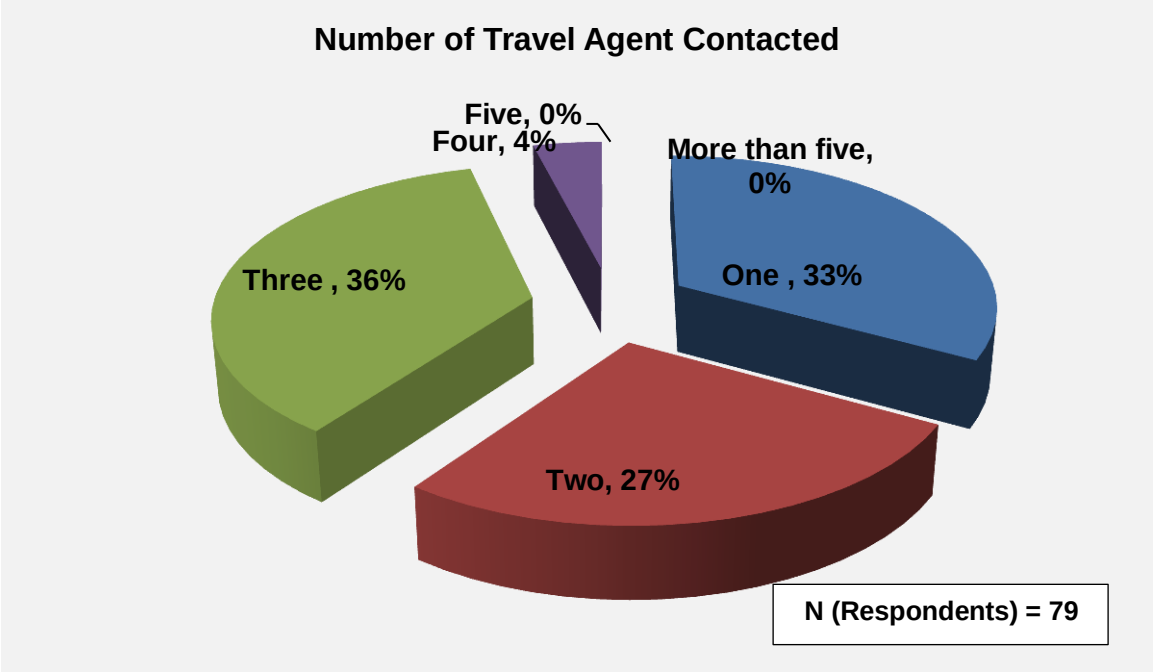
Figure 59: Tour Operator Selection Criteria



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

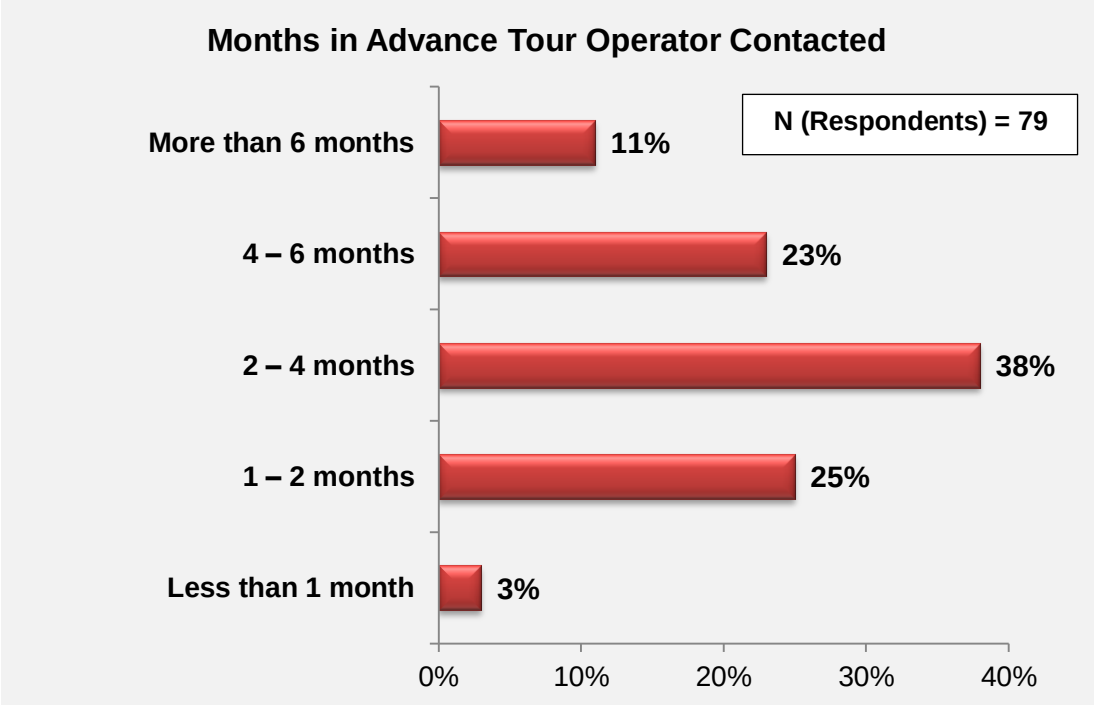
Of the 79 respondents who mentioned that they would approach tour operators, 27% said that they would contact at least 2 operators before reaching a decision. 36% expressed the intention of approaching 3 or more operators before they took a decision.

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



38% respondents mentioned that they would contact the travel operator at 2 to 4 months in advance. 23% respondents displayed intention of connecting with the tour operator 4 to 6 months in advance.

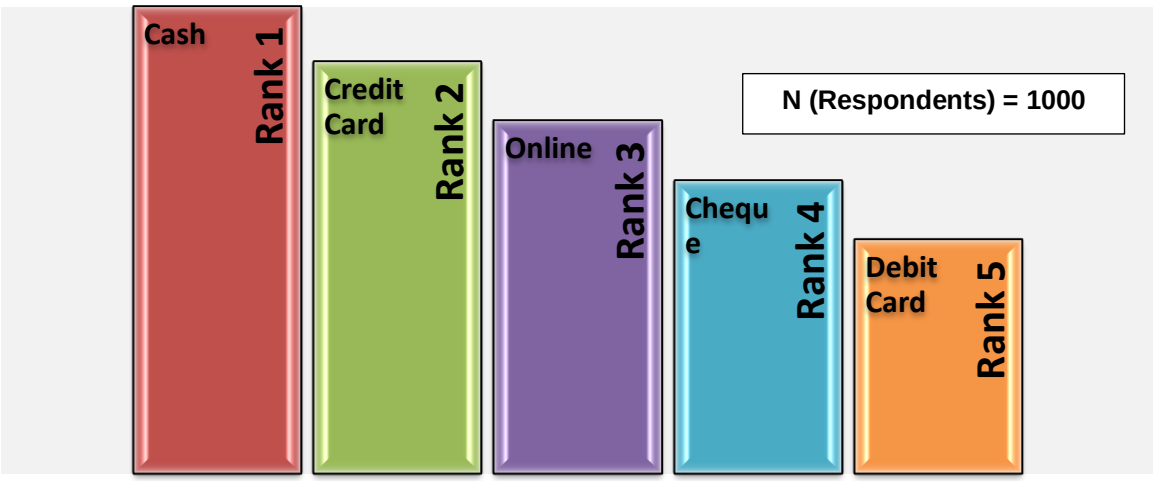
Figure 61: Months in Advance Tour Operator Contacted



4.1.2.7 Mode of payment preferred

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

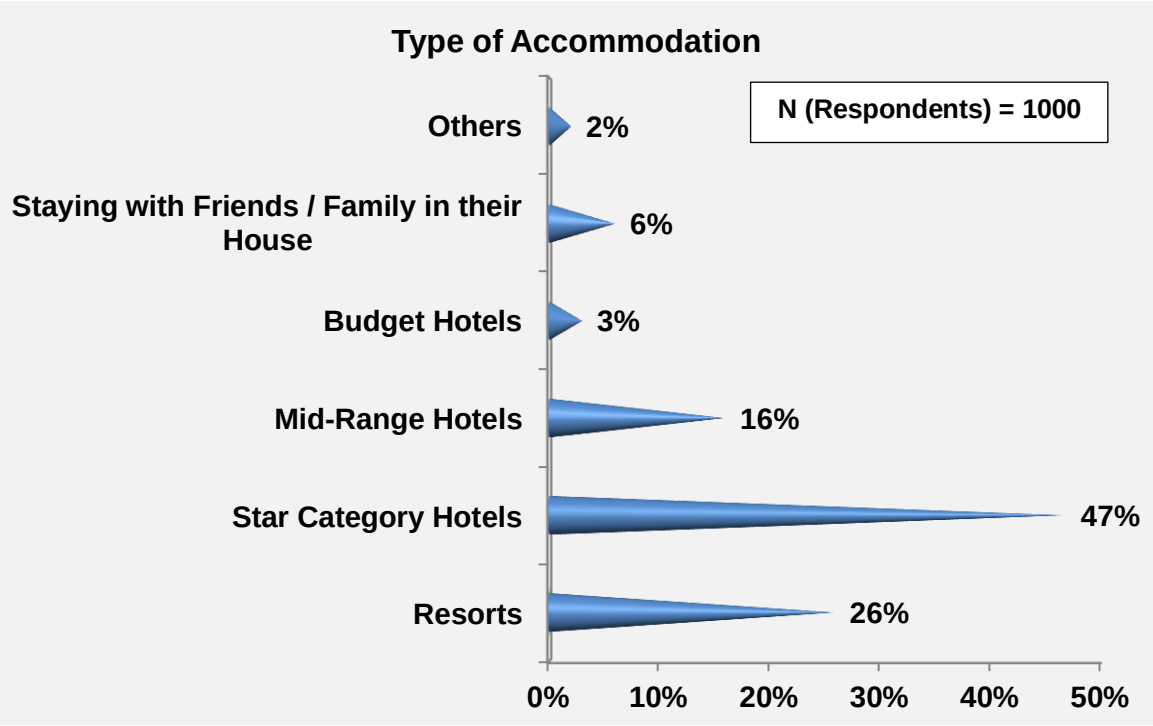
Figure 62: Mode of Payment Preferred



4.1.2.8 Type of accommodation to be availed

The 1000 prospective travellers were questioned about the type of accommodation that they would prefer during their trip. About 26% prospective travellers were willing to look at resorts rather than star category hotels while another 16% stated that mid-range hotels would be their preferred accommodation.

Figure 63: Respondents by type of accommodation

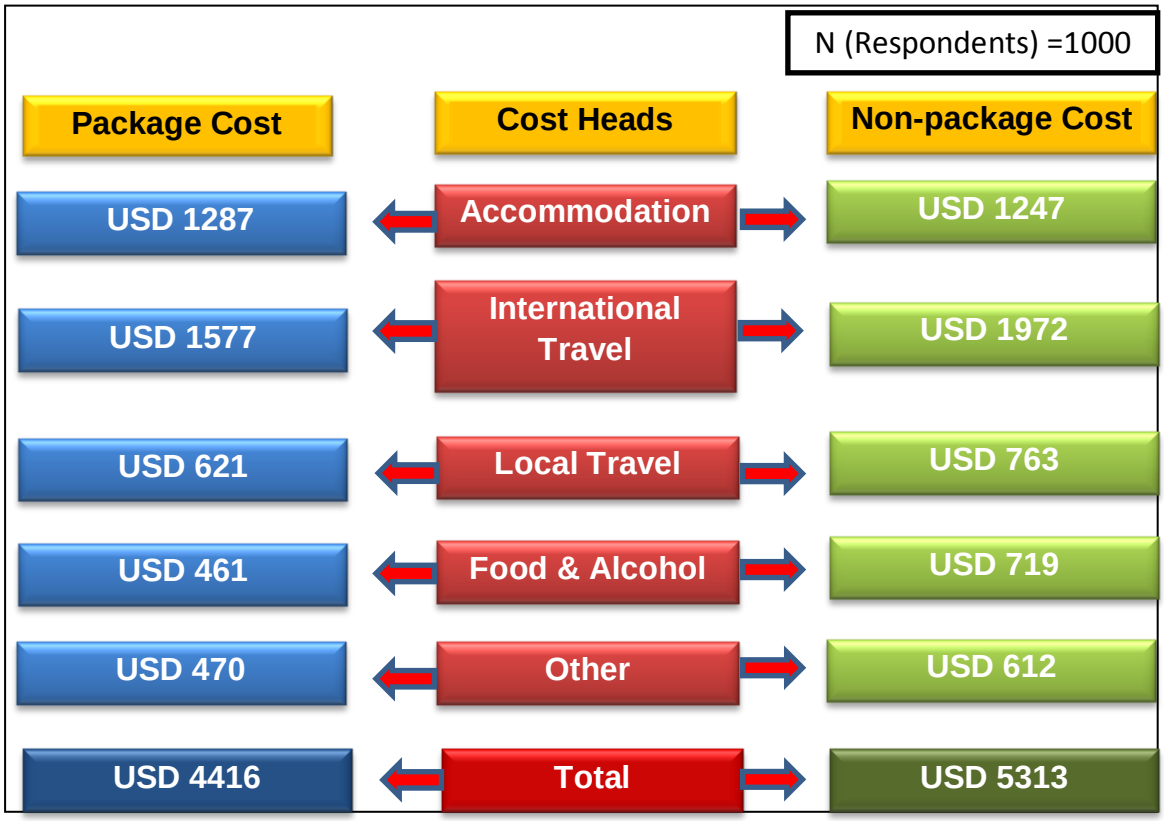


Note: Star category hotels: Hotels with more than 4 stars; Mid-ranged hotels: Hotels of 3 stars rating; Budget hotels: Hotels with 1-2 stars rating.

4.1.2.9 Estimated Package and Non-Package Expenditure Per Head

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

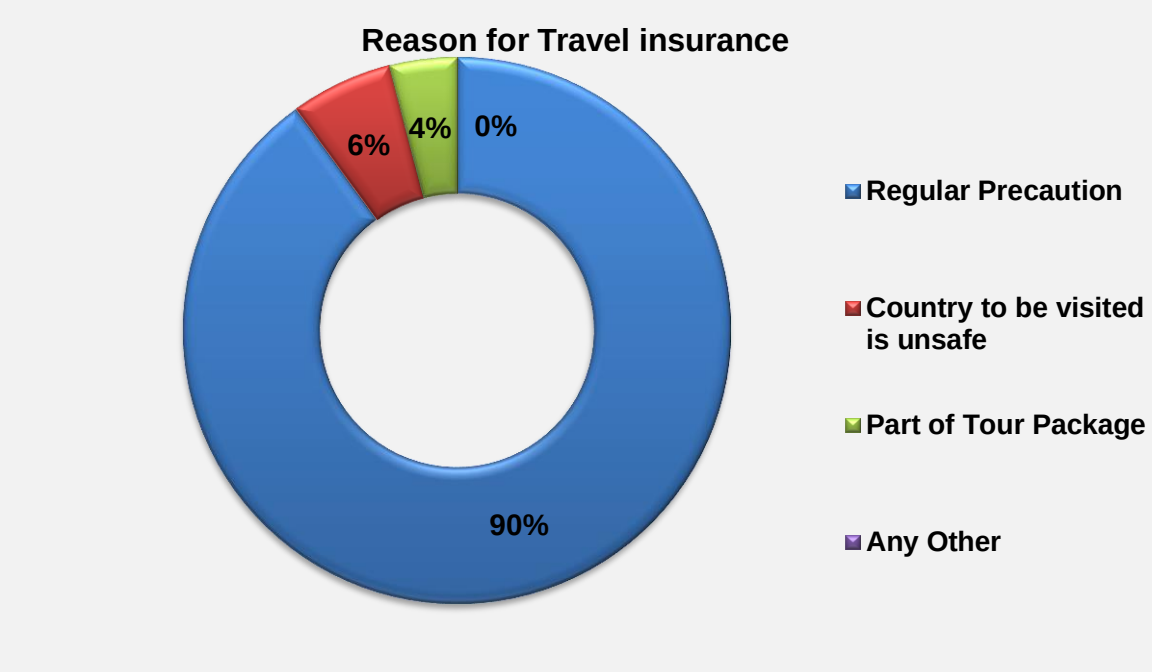
Figure 64: Expenditure across cost baskets



4.1.2.10 Reason for availing travel insurance if any

78% of prospective travellers (1000 respondents) wished to opt for travel insurance. Majority (90%) said that this was part of regular precaution they took while travelling.

Figure 65: Reason for Opting of Travel Insurance


Reason for Travel insurance
6%
4%
0%
90%
Regular Precaution
Country to be visited is unsafe
Part of Tour Package
Any Other

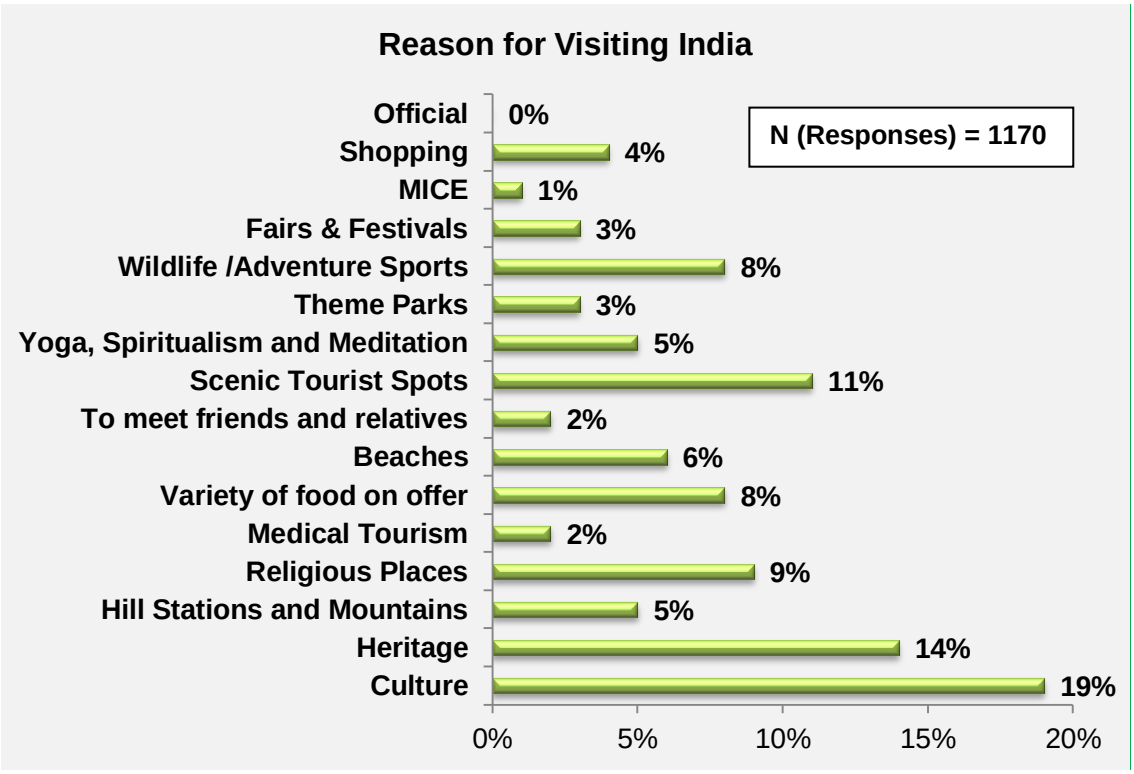
4.1.3 Travel Behaviour of Prospective Visitors to India

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

4.1.3.1 Reason for choosing India as a travel destination

Respondents were asked to share their reasons for choosing India as a travel destination and they were given the freedom to choose multiple options. A total of 1170 responses were received from the 250 respondents of which 19% responses indicated the desire to see the culture of India as the driving reason.

Figure 66: Reason for choosing India for next trip



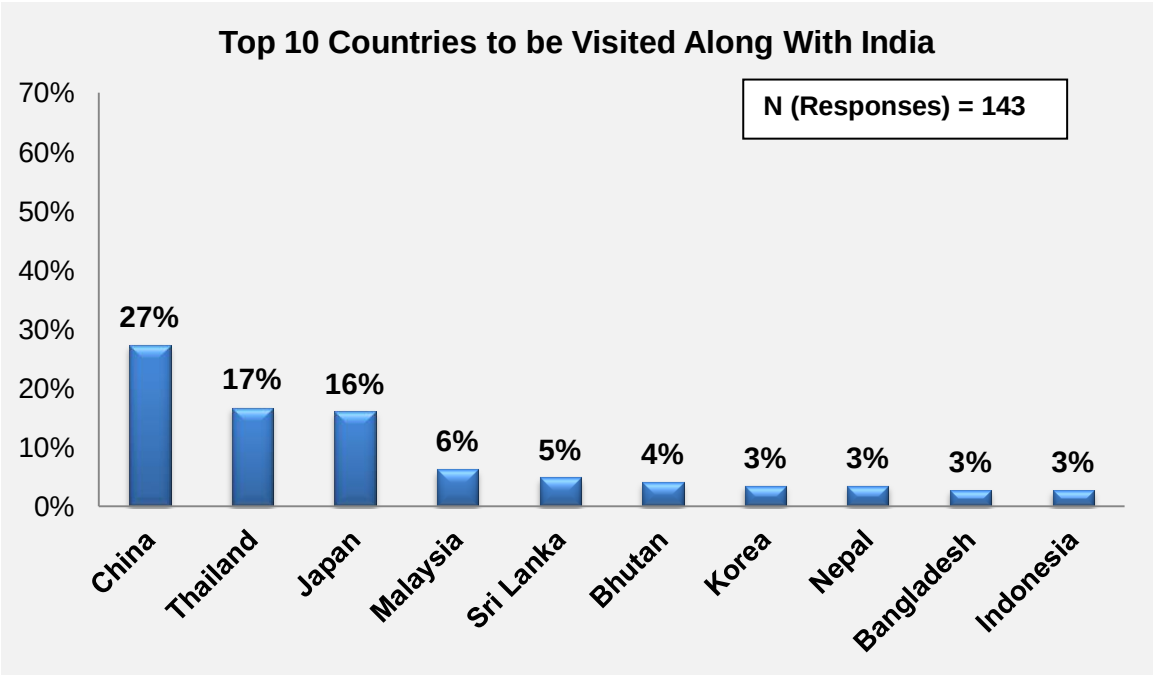
4.1.3.2 Intention of visiting only India or as part of a sub-regional trip

72% of these 250 respondents intended to visit India only and not as part of a regional tour to South Asia.

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

27% of these 71 respondents intended to visit India as part of a regional tour to South Asia mentioned China in their schedule.

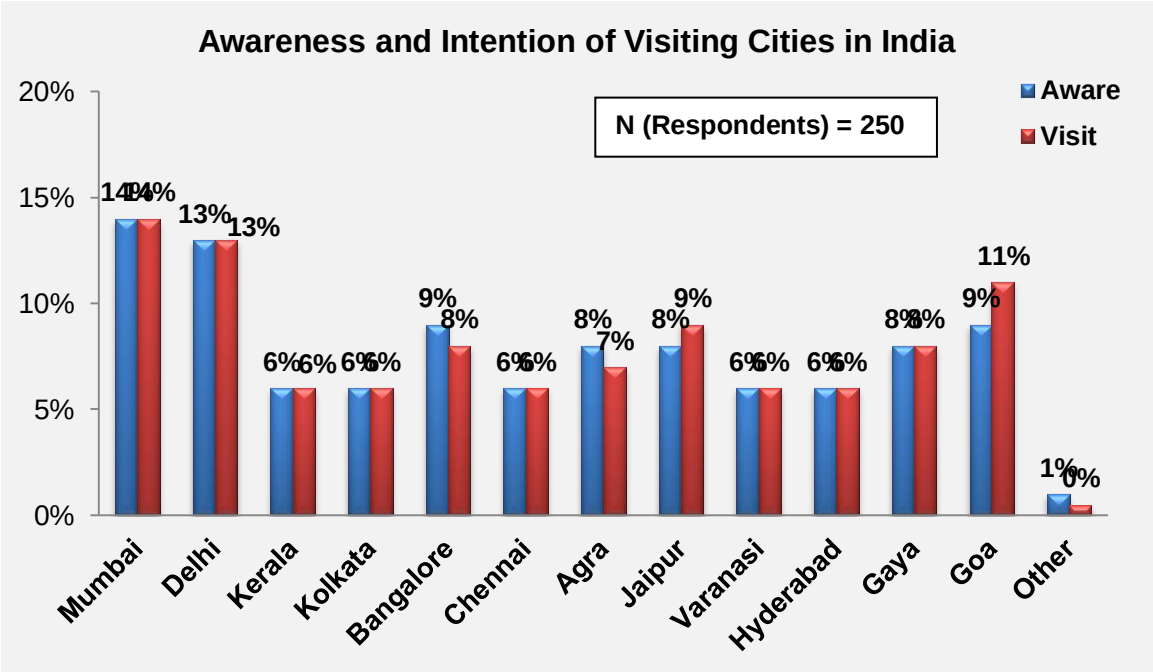
Figure 67: Top 10 Countries to be visited along with India



4.1.3.4 Awareness and intention of visiting destinations in India

The 250 respondents were queried about the cities they were aware of and planning to visit during their next trip. The destinations travellers were most aware of were revealed to be Mumbai and Delhi. Examination of the responses shows 13% of the persons wanted to visit Delhi while 14% wanted to visit Mumbai.

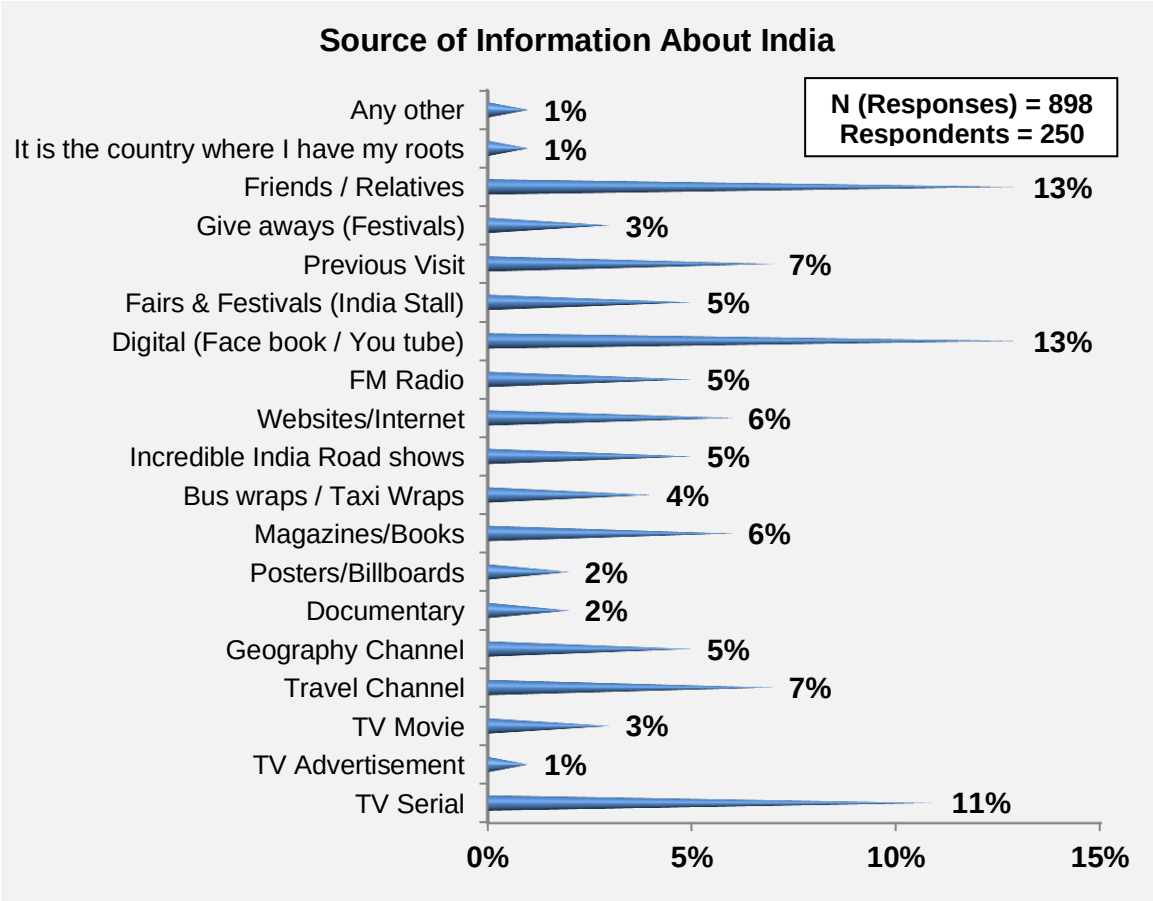
Figure 68: Awareness about a destination and its traction for the visitor



4.1.3.5 Source of information regarding India

Respondents were asked to indicate their source of information about India and they were given the freedom to select multiple options. Travellers, who planned to visit India in the near future, have largely known about India through social media; about 13% of responses received indicated this. 13% of all responses indicated that friends/ relatives were an important source of information.

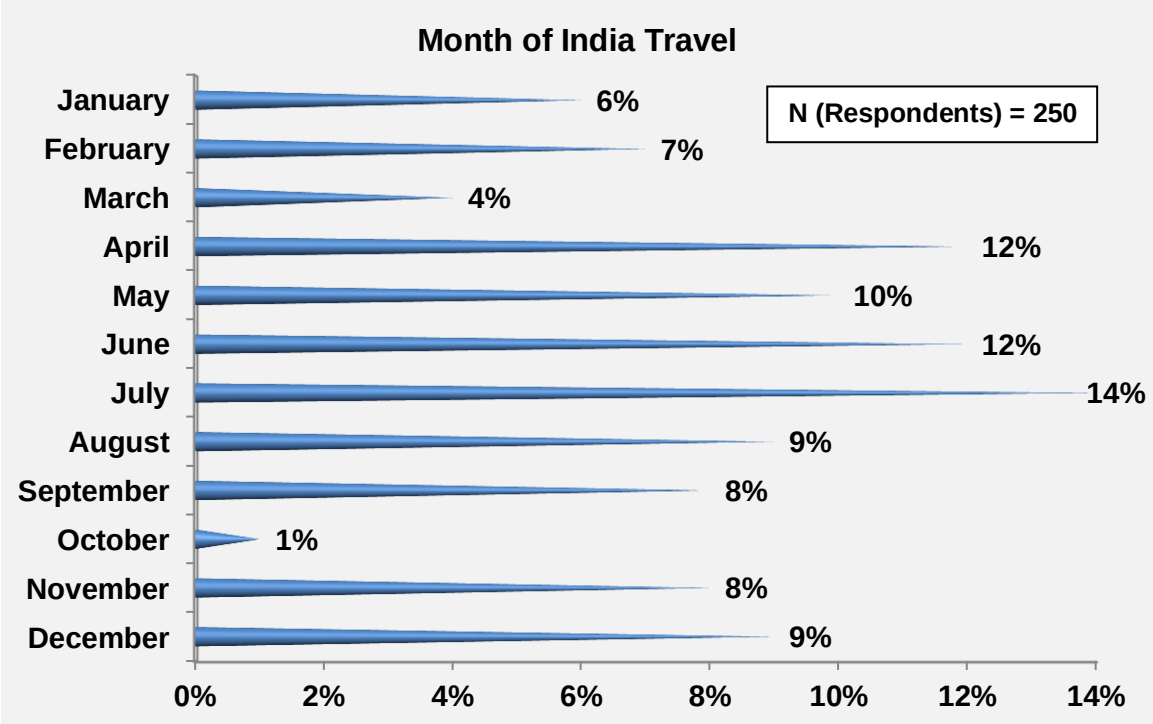
Figure 69: Sources of information about India



4.1.3.6 Time of visit to India

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

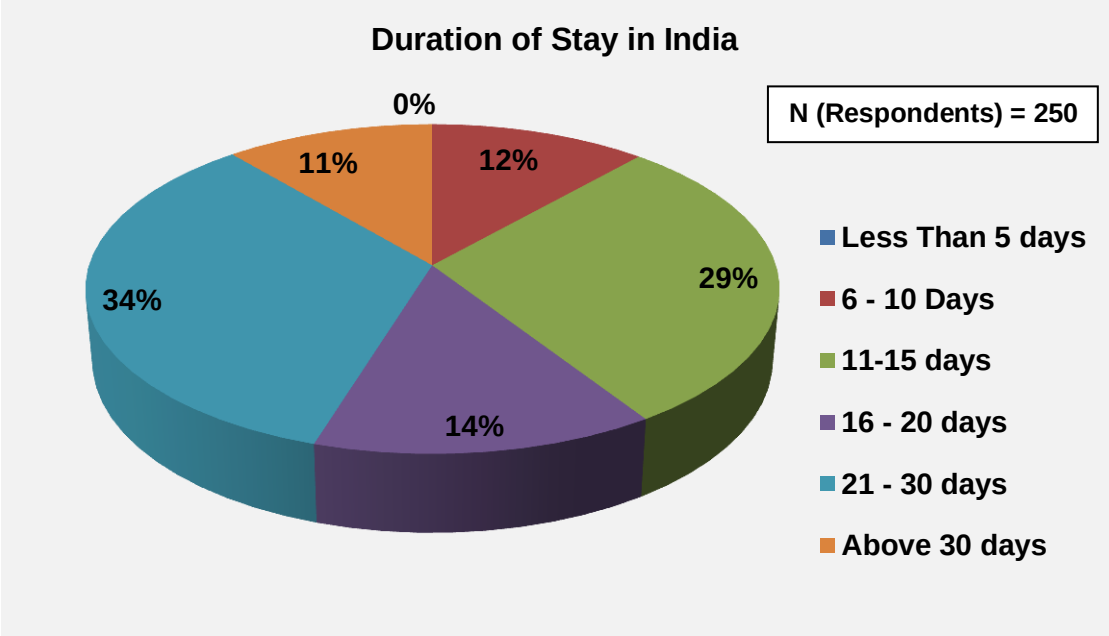
Figure 70: Preferred month for potential visit to India



4.1.3.7 Duration of stay

29% of the 250 respondents intend to stay for a period of 11 to 15 days in India. 12% intended to stay for 6 to 10 days.

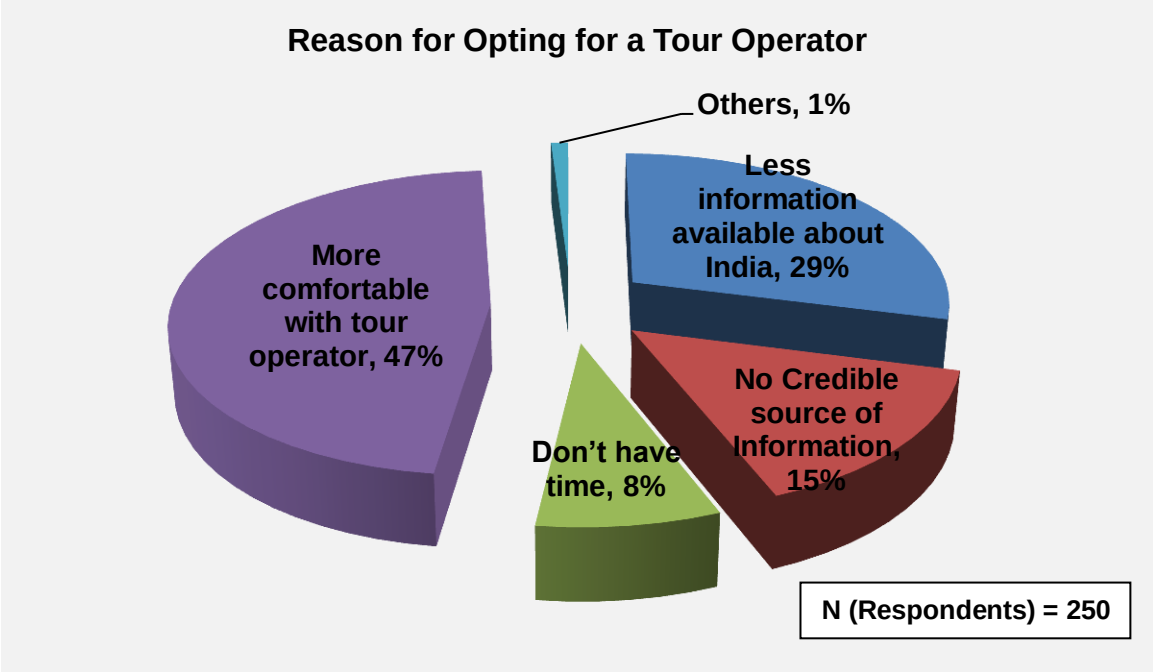
Figure 71: Duration of Stay in India



4.1.3.8 Reason for booking through a tour operator while visiting India

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

Figure 72: Reason for Opting for a Tour Operator



4.1.4 Travel Behaviour of Prospective Visitors to Other Countries

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

4.1.4.1 Countries to visit

Among these 750 respondents, top favoured destinations were USA, Spain, Italy, France and Turkey.

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

4.1.4.2 Drivers / reasons for visiting foreign locales

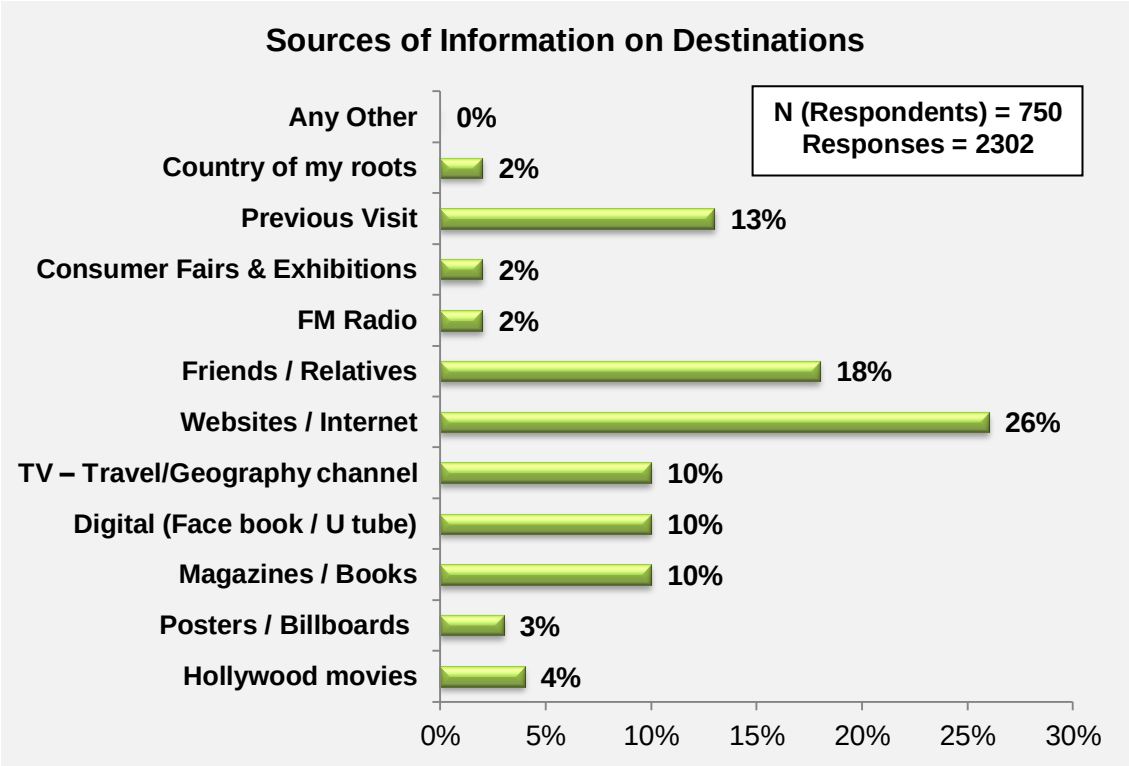
Respondents were asked the main reasons why they intended to travel overseas in the near future. The top most reason for travel was cited as leisure/recreation (76% respondents of 750). The other important driver was visiting for heritage and culture (9% of 750 respondents).

Figure 74: Reason for travelling overseas

4.1.4.3 Sources of information on the destinations to visit

Respondents were asked to list the sources of information they intended to tap to know about their destination countries. They had the freedom to select multiple options. 2302 responses were yielded by 750 respondents. Important sources of information regarding destination countries are internet followed by friends/ relatives — 26% and 18% of responses respectively.

Figure 75: Sources of information about destination countries



4.1.4.4 Awareness of India as a tourist destination

9% of 750 respondents were aware of India as a potential destination before they took their decision to head elsewhere.

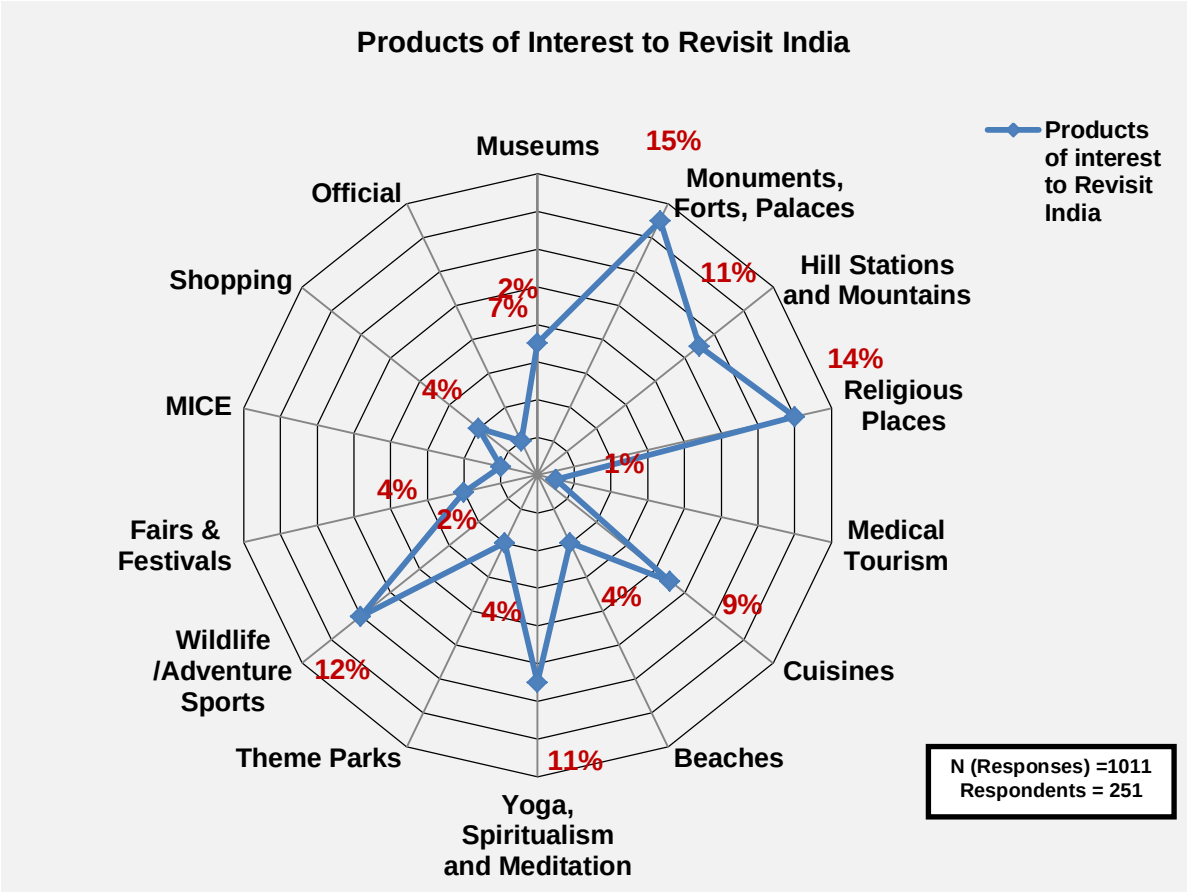
4.1.4.5 Intention of visiting India

About 34% of the 750 respondents expressed their intention to visit India next time. 499 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 251 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 1011 responses as multiple options were permitted. They evinced interest in India's monuments, forts and palaces as the most attractive motivation (15% of responses).

Figure 76: Primary attractions in India

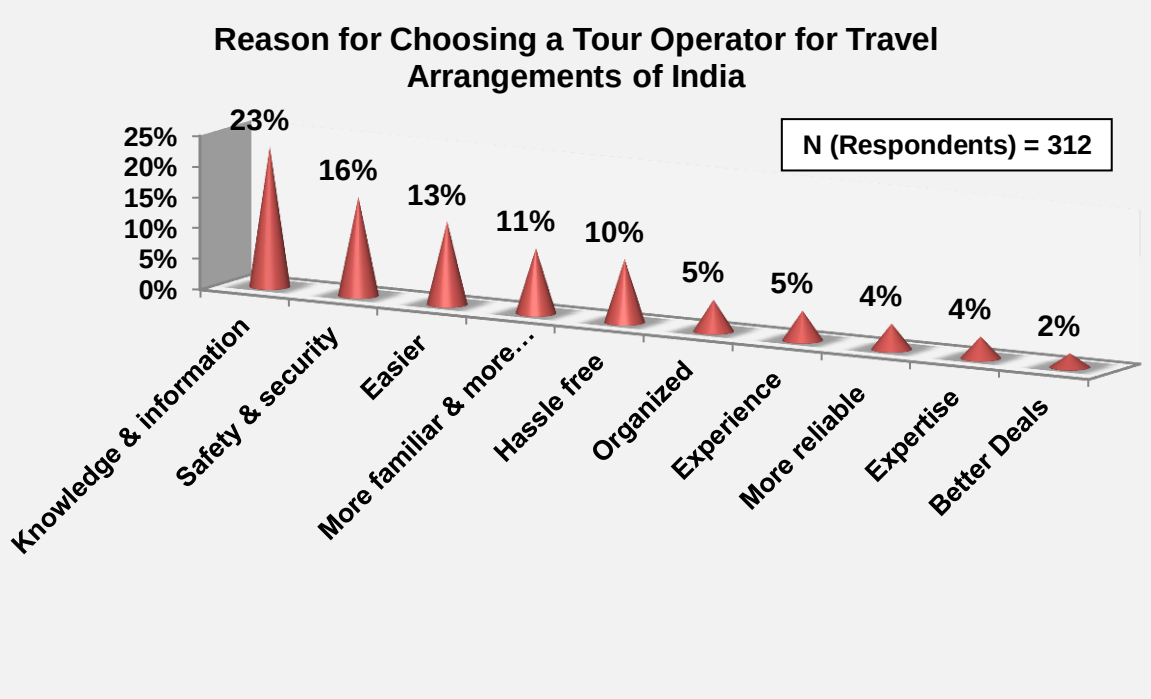


4.1.4.7 Intention and reason for choosing an intermediary for India travel

58% of the total 750 respondents felt that if they were to visit India, they would plan it themselves rather than go through a tour operator. Out of the total 750 respondents, 312 persons expressed their intention of hiring a tour operator.

23% felt that the intermediary would provide better knowledge about India and has more information of India. Another 16% felt that going through a tour operator would provide safety and security.

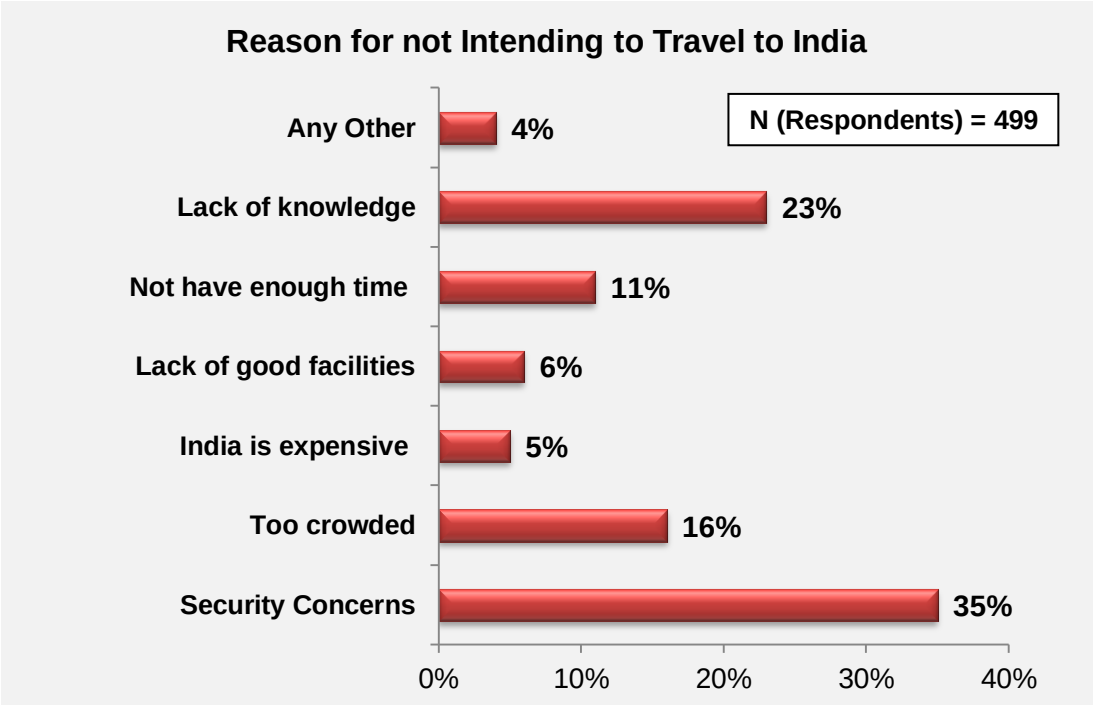
Figure 77: Reason for Choosing a Tour Operator for Travel Arrangements in India



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

The 499 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 (35% respondents).

Figure 78: Reasons for not intending to travel to India



But 73% respondents, at the end of the interview mentioned that they would indeed like to visit India at some point in the future, if not immediately.

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

4.1.5.1 Accommodation Availed by Intending Travellers

Among prospective travellers who are headed to India, a large percentage (48%) planned to stay in star hotels whereas travellers who are headed to other countries, 45% planned to stay in star hotels.

Table 24: Accommodation Availed by Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
30%	Resorts	25%
48%	Star Category Hotels	45%
13%	Mid-Range Hotels	17%
3%	Budget Hotels	4%
6%	Staying with Friends / Family	7%
0%	Others	2%

4.1.5.2 Package Expenses of Intending Travellers

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

Table 25: Package expenses of Intending Travellers – India vs. Other Country

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
1178	Accommodation	1323
1415	International Travel	1631
629	Local Travel	619
399	Food including alcohol	482
320	Others	520
3941	Total	4575

4.1.5.3 Non-Package Expenses of Intending Travellers

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

Table 26: Non-Package Expenses of Intending Travellers – India vs. Other Country

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
942	Accommodation	1349
1675	International Travel	2071
458	Local Travel	865
317	Food including alcohol	853
271	Others	726
3663	Total	5864

4.1.5.4 Preferred Mode of Payment of Intending Travellers

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

Table 27: Preferred Mode of Payment of Intending Travellers – India vs. Other Country

Intending Travellers to India	Payment Mode Categories	Intending Travellers to Other Countries
1	Cash	1
4	Cheque	5
3	Online	3
2	Credit Card	2
5	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 are headed for other countries, majority of trip bookings were done by the travellers themselves (through internet and over the counter).

Table 28: Mode of Trip Booking of Intending travellers – India vs. Other Country

Intending Travellers to India	Payment Mode Categories	Intending Travellers to Other Countries
86%	Self (Internet)	77%

9%	Self (Counter)	14%
5%	Travel Operator /Agent	9%

4.1.5.6 Source of Booking Information for Intending Travellers

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

Table 29: Source of Booking Information for Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
29%	Travel Portals	28%
10%	Books	9%
28%	Websites / Internet	33%
10%	Brochures on Country	9%
5%	Country Tourism office in my own country	5%
13%	Friends / Relatives	13%
5%	Past Visits	3%

4.1.5.7 Type of Travel Agent Used by Intending Travellers

For prospective travellers who headed to India, majority (50% of respondents) did their bookings through multi country tour operators and those who headed for other countries, majority (47% of respondents) did their bookings through tour operators based in their own country.

Table 30: Type of Travel Agent Used by Intending Travellers – India vs. Other Country

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
50%	Multi Country tour operator	28%
25%	Tour operator that operates in my own country	47%
8%	Tour operator in India	0%
17%	Freelance travel agents	25%

Chapter Five

India Tourism Office – Survey Findings

5.1 India Tourism Office

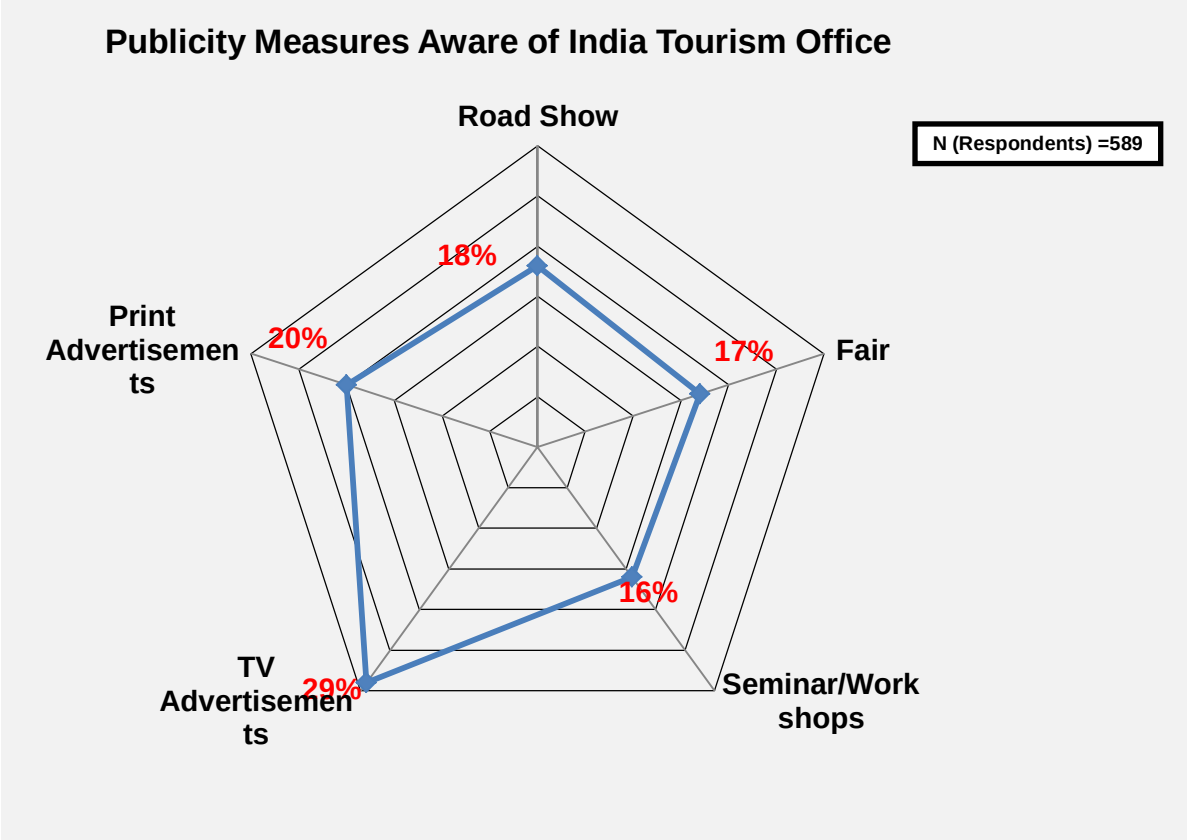
5.1.1 India Tourism Activity Response of Past Travellers

The survey had specific focus on the impact of the promotional activities of India Tourism Office in Frankfurt, Germany. Past travellers to India were asked to share their opinions on various aspects of the India Tourism Office.

5.1.1.1 Awareness of India tourism office promotions and advertisements

48% of the 1000 travellers who had been to India in the past were aware of the existence of an India Tourism Office in their country and out of them 79% were also aware about its promotional campaigns. They had learnt of India Tourism Offices from promotional campaigns disseminated through TV advertisements (29% of respondents) and print advertisements (20% of respondents).

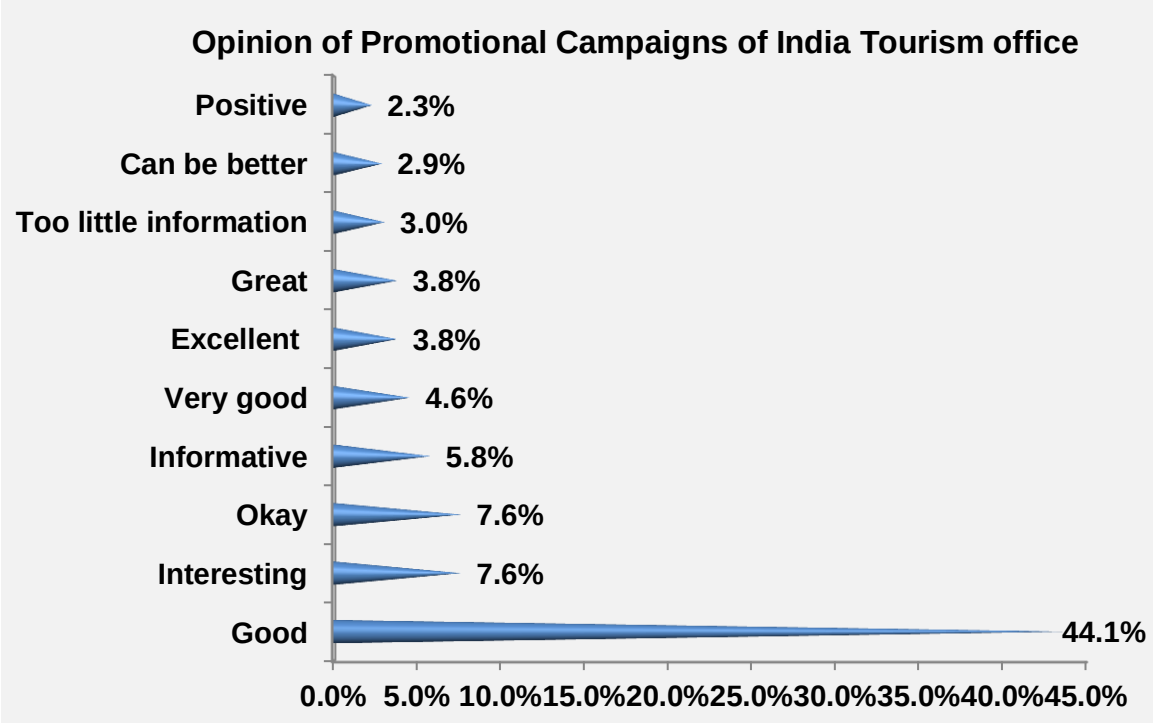
Figure 79: Source of information about India tourism office



5.1.1.2 Effectiveness of promotions and activities

As many as 44% of the 589 respondents who answered about their opinion on the promotion campaigns of India Tourism office in Frankfurt, felt that these promotional campaigns were. The promotional activities need to be more focussed to a product or a theme or a state rather than projecting India as a whole.

Figure 80: Opinion of Promotional Campaigns of India Tourism office



5.1.1.3 Influencing ability of promotional campaigns by India tourism office

50% of 1000 respondents admitted that this did have some influence on their decision to visit India.

5.1.1.4 India tourism office as information source for all destinations in India

70% of 1000 respondents felt that the information provided by the India Tourism Office was adequate.

5.1.2 India Tourism Activity Response of Prospective travellers

5.1.2.1 Awareness of India tourism office presence

Of the 250 prospective travellers, around 70% were aware of an India Tourism Office in Frankfurt.

5.1.2.2 India tourism office approached or not

59% of those who were aware had approached the office for assistance in planning the India trip.

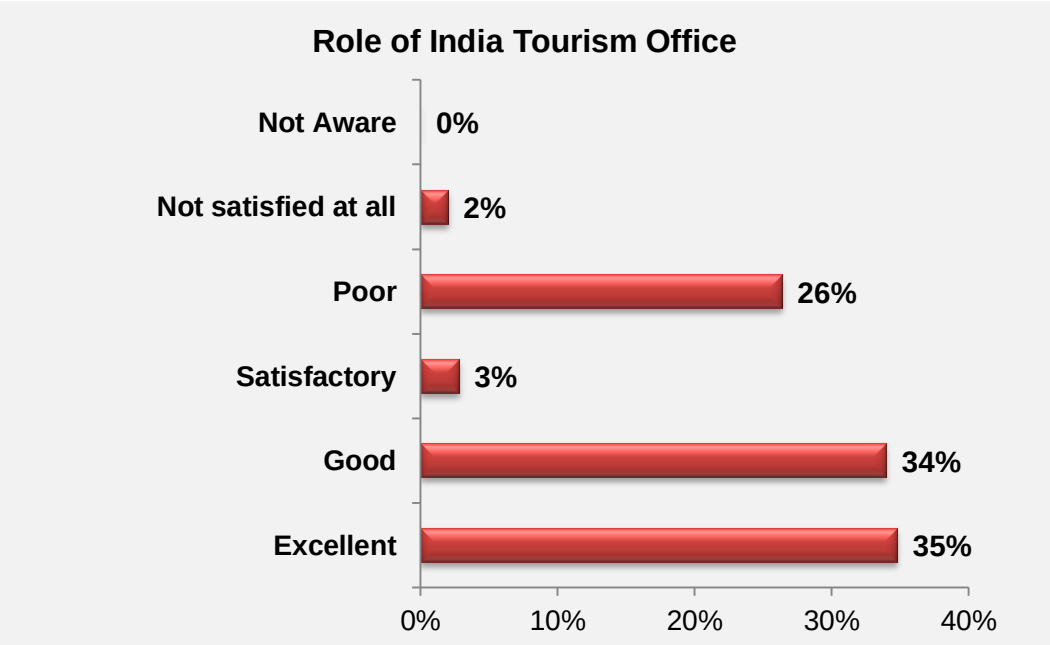
5.1.2.3 Role of India tourism office in helping tourists plan a trip to India

Of the 103 persons who approached the India Tourism Office, 94%, that is 97 of them received adequate support and guidance.

5.1.2.4 Evaluation of role of India Tourism Office in promoting India as a tourist destination

35% of the 250 respondents felt that the Indian Tourism Office was playing an excellent role in promoting India as a tourist destination.

Figure 81: Role of India tourism office



5.1.3 India Tourism Activity Qualitative Evaluation

The tour operators and walk in potential tourists were in praise of India Tourism Office in Frankfurt for their helpful and amiable nature. The main problem that exists in the India Tourism Office in Frankfurt is visibility. The India Tourism Office in Frankfurt participates in all major fairs and events but it is not known by the potential travellers that a India Tourism Office exists physically in the country and in the city of Frankfurt. Thus it is essential for the India Tourism Office in Frankfurt to engage in Tourism promotion activities along with promoting their presence in Frankfurt so that potential tourists with intentions of going to India can directly contact them in case they require any information or assistance about planning their trip to India.

The tour operators, who were interviewed, felt that though the India Tourism Office staff was helpful and their experience was satisfactory, at the same time, it was felt that these offices were not walking the extra mile to pull German tourists to India. As an example, it was mentioned that there are very few advertisements by the India Tourism Office in Frankfurt and there is a need to put out India advertisements in mainstream German media in German language. This is also a hindering factor for tourists and makes them nervous about visiting India due to language and communication problems.

Another important problem that the tour operators feel that the India Tourism Office Frankfurt should take an active step in advertising the E-Visa facility that India has started. The E-visa facility that was started by the Indian Government did not appear in the German media and went largely escaped from the public in Germany. The tour operators also felt that while the India Tourism Office was participating in trade fairs and road shows and generating publicity material in the form of brochures etc, there was a dearth of focused marketing communication collateral that engages with and sends out clear messages to the travel agents and tour operators who are critical intermediaries in the trade. The tour operators also expressed that there was no sharing of information, no get together or any meeting with the Indian tourism office happening. No communication on any developments in tourism in India is happening currently between India Tourism Office and agents. The

tour operators feel the need for assistance of the India Tourism office in providing list of accredited tour guides in India who are fluent in German. Guides who are there presently are not so well informed about the local situation. It's the task of the tour guide to inform well in advance-why, what etc. but this does not happen, attitude is very different

Certain recommendations came in from the trade on thrust areas for the future. These included:

1. Provide more positive information in Media, e.g. E- Visa was introduced but it did not come in the Media there
2. The image of India needs to be lifted up among the normal public. Need to bring India back in the mind of the people.
3. There are more women travellers to India, due to certain incidents and media hype regarding the safety issue they have become afraid of going alone. There needs to be some campaign by the Indian Government on Safety issue of Women travellers and it needs to be promoted actively by the India Tourism Office
4. The travellers have to be made aware what is there in India – need to advertise/prepare a documentary I and to be shown in German local channels – ARD, ZDF, RTL. Besides this more publicity in German Magazines in German language.
5. Information on German speaking guides who the tourists can contact in India for their tours
6. More communication with trade. Regular updates about events and activities
7. Offering more support in terms of promotional material and campaigns, more enrolment with trade;
8. Educate agents/ trade about our products i.e. write ups, latest trends in India, change the theme every time
9. Provide ads in local language
10. Having ads with German celebrities and writers sharing their India experience

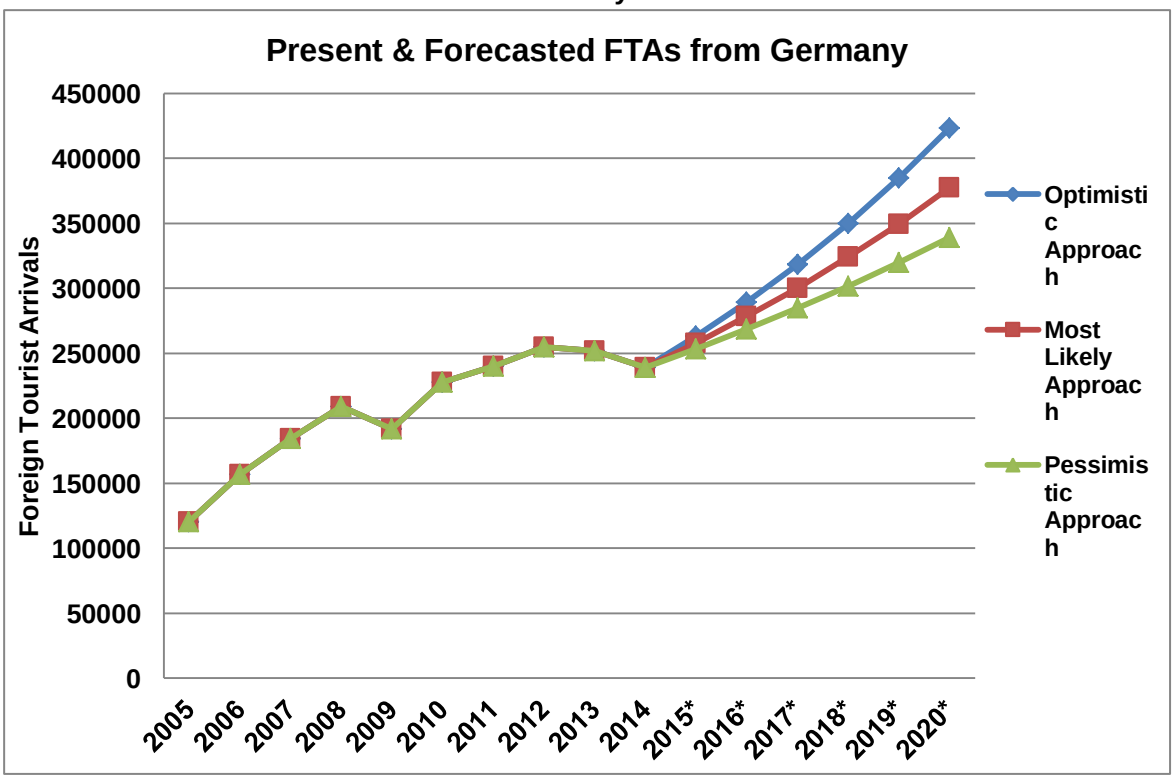
6.1 Projections for Future Outbound Travel

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 7.9% for the period 2005 to 2014. "***Optimistic Approach***" assuming that all factors considered for the forecast grow at a constant rate- we have taken the rate at 10%. "***Pessimistic Approach***" - assuming the possibility that any future calamity can affect the factors considered- we have taken the rate as 6%. These approaches are captured in the forecast illustration below.

6.1.2 Forecast of Outbound Tourists from Germany

Figure 82: Present & Forecasted FTAs from Germany



The above data in tabular format is as presented below.

Table 31: Present & Forecasted FTAs from Germany to India

Years	Optimistic Approach	Most Likely Approach	Pessimistic Approach
2006	156808	156808	156808
2007	184195	184195	184195
2008	209252	209252	209252
2009	191616	191616	191616
2010	227720	227720	227720
2011	240235	240235	240235
2012	254783	254783	254783
2013	252003	252003	252003
2014	239106	239106	239106
2015	248314	248314	248314
2016*	265696	261226	258247
2017*	284295	274810	268576
2018*	304195	289100	279319
2019*	325489	304133	290492
2020*	348273	319948	302112
2021*	372652	336586	314196

**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 Germany will remain as it was during the time period based on which these figures have been projected. Occurrence of any contingency or event might affect the figures as given above.

Chapter Seven

Conclusion & Way Forward

7.1 Conclusion

Conclusion:

The study of 3000 travellers and tour operators was conducted in the German cities of Frankfurt, Berlin, Hamburg, Dusseldorf and Munich. These 3000 travellers consisted of 2000 past travellers and 1000 prospective travellers. Utmost care was taken so as to not include NRIs/ PIOs as their responses might have skewed the trend of other perceptibly impartial travellers in terms of their knowledge of India and reasons for visiting India. However, it was found out from the study that Germans are not too much aware of India and they perceive India as a beautiful place of culture and heritage. The top of the mind impression of India for Germans is Golden Triangle, Goa, Mumbai, Rajasthan, etc. For the Germans, Indian Food and beaches, religious places and temples, festivals, culture, heritage etc. is a very attractive draw to come and visit India.

This positive impression of India is also dotted with some negative aspects which primarily do not convert the intention of visiting India to actually visiting India. Some of the negatives aspects of India, as per the German travellers are the fact that there is no comprehensive information available about India. Even when they have heard from friends and relatives about India and go to any travel agent for information on India, they do not get any information. The travel agents and tour operators in Germany are not having any deep and total information on India and are not able to help travellers who are interested in visiting India. Since information is not present, the travellers grow apprehensive about travelling to India and hence drop their plans. In this way conversion of travel interest to actual travel is not happening. Moreover since it is not well known in Germany that there is an India Tourism office present in Frankfurt, the travellers do not know who to go to for travel information regarding India.

The major markets for the travellers are mainly Thailand, Vietnam, Cambodia, Laos, UAE, Italy, Spain, Greece., Netherlands, Bulgaria, and Belgium. India also features

but not in Top 10. For Beach holidays Vietnam, Cambodia is hot selling, whereas Sri Lanka, Nepal and India are for Ayurveda, Culture and Yoga. Since it's a long haul destination and also for a minimum of 14 to 15 days, India is more preferred by older people 45 – 70 years. The average budget is between 3500 to 4000 Euro per person with 4 to 5 star accommodation facility. There are certain sections of the travellers – luxury travellers whose budget goers as high as 10,000 Euro/person as it's all business class. There is a need to promote India to the German travellers – consumers, need to create a desire and motivate the travellers to experience India.

Germans who have travelled to India are mainly through word of mouth or if any of their friends or relatives have travelled in the past. People are very friendly but the only issue when one goes for any shopping is that people surround you and pester. The booking for majority of the travel be it airlines, hotel is online and for other expenses it's either in cash or credit card. The average period of travel is 12 to 15 days for a family leisure travel. The necessary bookings are made at least 2 to 3 months in advance. One travellers mentioned "*In case of travelling to India one needs to plan well in advance and it has to be very well, the issue is as we do not have much information about India - how to communicate, which language can be spoken, how to move about, can we rent a car, how to do it can we drive it on our own etc., …… things are not very clear .It is too complicated a country*". While another woman travellers mentioned that "*It is very difficult to travel alone to India; hence it is preferred to go in a group – guided trip wherein a travel /tour operator needs to be engaged with".*

Regarding the Indian Tourism office activities, trade felt that though India Tourism Office takes part in most of the exhibitions, trade shows, puts up huge stalls etc. but it's not impacting the actual decision makers/travellers wherein he or she decides to travel to India. Also, by and large the Germans were not aware that an Indian tourism office exists in Frankfurt and one traveller mentioned "*we see them only during some trade shows*".

The trade feels that there is a need to show case the changing India, share life experience of some Germans who have travelled to India and what has been their experience, have to engage more with the trade so that they can also show case their services which they can offer. To promote that India is safe and image of India

needs to be lifted up among the normal public. This is most required since there are more women travellers to India from Germany and due to certain incidents and media hype regarding the safety issue; they have become afraid of visiting India alone. There needs to be some campaign by the Indian Government on Safety issue of Women travellers so that the volume of women travellers from Germany to India increases. The trade also feels that the ministry should provide positive information about India from time to time in the mainstream German media as it is very much required to bring back India in the minds of Germans to increase the conversion of intent to actual visit to India. The other major issue is Direct sellers have no knowledge about India, no support from India Tourism and no idea of any destination. Hence there is a need to carry out some events for the education of the direct sellers about India so that they can guide the travellers in a more efficient manner. Also the need of the hour is to organize special events for customers /travellers wherein India is show cased, new things happening in India, what India is all about – culture, festivals, food, yoga so that they can visualise the real image of the country. A day on India wherein some dances, festivals, and cuisine is show cased, some presentation to show what to expect in India.

Roadmap to Improve Promotional Activities:

- Feeding positive information about India from time to time in the mainstream German media as it is very much required to bring back India in the minds of Germans
- Show case the changing India, share life experience of some Germans who have travelled to India and what has been their experience, have to engage more with the trade so that they can also show case their services which they can offer
- To promote that India is safe and image of India needs to be lifted up among the normal public. This is most required since there are more women travellers to India from Germany and due to certain incidents and media hype regarding the safety issue
- Travellers are aware about India but, have no information on India to plan their travel. The information provided needs to be more comprehensive and clear. Travellers feel the need of a travel itinerary.

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

Trade/ Tour Operator:

Focussing on trade and forming a symbiotic relationship with trade will foster a greater number of foreign tourist visits to India. It is also suggested that more liaising with German tour operators and training them about Travel in India are facilitated by

the India Tourism Office in Germany so as to increase the tourist traffic to India. It is also suggested to improve the number of tour operators who sell India by providing free training and tutorials for tourism in India by Ministry and motivate them to work for 'India Tourism Office'. India Tourism Office must publicize their presence in Frankfurt as it is almost unknown both to travellers and direct sellers of tour packages. India's participation in important fairs and festivals is already present but it is imperative that they sponsor events which will finally send a message to "*Welcome to India"* in regular intervals so as India stays in the minds of potential travellers. More communication with tour operators is required with regards to events that can be organized to boost tourism to India. Regular updates to trade should be done regarding visa rules, changes in any rules and regulations in India, new destinations, new property, new facilities, etc. so that the constant information flow is present amongst the trade from the Indian Tourism Office.

Media:

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

Traveller:

The travellers in Germany do not get to see much of India Tourism advertisements in the popular local German media and hence an effort to overturn this situation is required. More efforts need to be put in creating promotional campaigns which will increase footfalls of travellers to India. In order to attract intending travellers as well as past travellers (for repeat visit) - a comprehensive plan with lots of stimulus is

essential. The travellers in Germany require comprehensive and detailed travel plans and hence different travel plans in totality needs to be promoted to them. Maps, guidebooks and brochures needs to be present in German. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website. Promotional campaigns in local language should address the information gaps that are currently present so as to increase travellers interest in India and also to remove unfounded fears regarding travelling to India.

7.2 Way Forward – Long Term & Short Term Measures

Short Term Measures:

- Incredible India advertisements in local language on local popular German channels like ARD, ZDF, RTL, etc. on TV and popular social media
- India tourism brochures, maps and guidebooks in the local language
- Publicity of the presence of India Tourism Office in Frankfurt as most potential travellers are oblivious of the fact
- Putting out positive information on India in mainstream German media from time to time
- Publicity campaign featuring safety and security while travelling in India especially targeting women travellers from Germany
- Publicity campaign with focused travel plans
- State tourism boards advertising with specific products under the umbrella brand of “Incredible India”
- Feature Incredible India advertisements on social media
- Organize India nights and food festivals regularly so as to pique interest of German travellers about India
- Training and providing certified German speaking guides in various cities of India
- Impart training to front office executives who are in direct contact with prospective travellers so as they can handle all types of queries
- No new publicity material is there, there is no mention about New India – new destinations, new products, new packages, new circuits and new luxury properties need to be promoted alongside well known destinations, so as to offer a large choice in front of prospective travellers.

- Brochures with specific travel plans and itineraries
- 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**	**Source of information about the city**
	Y/N	
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	7
		Digital (Face book / You tube)	8
		Fairs & Festivals (India Stall)	9
Posters/Billboards_____ _____	2	Previous Visit	10
Magazines/Books_____ _____	3	Give aways (Festivals)	11
Bus wraps / Taxi Wraps	4	Friends / Relatives	12
Incredible India Road shows	5	It is the country where I have my roots	13
Websites/Internet_____	6	Any other_____	14

24. Which time exactly do you plan to visit India? Month_____ Year_____
25. What SHALL BE the approximate duration of your stay? _____days

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

Yes	1	No	2

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

Yes	1	No	2

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

Yes	1	No	2

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

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

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

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

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

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

32. What would be the reason for traveling abroad?

Reasons	Q 40
Leisure / Recreation	01
Business	02
Education/ Research	03
Visiting friends / relatives	04
Medical Aid / Hospitalization	05
MICE (Meeting, Incentives, Conventions, Exhibitions)	06
Religious	07
Heritage / Culture	08
Shopping	09
Any Other ……	10

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

Country	Time of the year	Yes / No	Duration

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

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

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

Yes	1	No	2

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

Yes	1	No	2

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

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

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

Self	1	Travel operator	2

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

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

40. What is the reason behind this decision?

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

41. Would you like to visit India ever?

Yes	1	No	2

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

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

43. What is your educational qualification?

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

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

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

THANK RESPONDENT

TOUR /TRAVEL OPERATOR

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

Collect visiting card

5. Countries where you offer travel or tourism services.

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

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

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

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

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

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

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

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

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

Websites / Internet	6	Any other_____	12

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

Serial No.	Country Name	Reasons	Percentage

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

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

INDIA SPECIFIC QUESTIONS

21. Did you hear about India?

Yes	*1*	*No*	*2*

(If yes, then administer Q 22 onwards)

22. Where did you hear about India from?

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

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

Yes	*1*	*No*	*2*

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

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

Name of the Location	***Period***	***Reason***

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

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

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

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

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

Yes	*1*	*No*	*2*

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

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

31. Do you have any specific agents in India?

Yes	*1*	*No*	*2*

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

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

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

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

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

35. Please identify any weaknesses you may have observed in India as a tourism destination?

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

Decreased	1
Remained the same	2
Increased	3

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

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

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

Yes	1
No	2

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

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

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

Indian Tourism Office Related questions

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

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

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

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

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

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

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

		Reason
YES	1	
NO	2	
DK	3	
REFUSED	4	

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

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

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

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

Year	*%*	*Year*	*%*

2015 - 2016		*2016 - 2017*	
2017 - 2018		*2018 - 2019*	

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

_____
_____
_____

THANK AND TERMINATE!