


Study on Tourism in Overseas Market of Japan

Final Report – Japan

For

Market Research Division
Ministry of Tourism
Government of India

सत्यमेव जयते
Government of India



nielsen

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Executive Summary

E1. The foreign tourist arrival (FTA) 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. The share of FTAs from Japan to India is quite high (2,20,000 FTAs from Japan to India in 2014) and Japan ranks 9th in the FTA arrivals to India, a vast opportunity lies untapped in the form of outbound travellers in the Japan market. Considering the tremendous potential to attract foreign tourist, The Ministry of Tourism, Government of India has taken lot of innovative steps in terms of promotion and market development activity. To get a better understanding, Ministry of Tourism commissioned a study to gauge the perception of tourists—past as well as prospective—in selected foreign markets about tourism in India. This study-report attempts to assess the impact of the ongoing overseas campaign launched by the Ministry of Tourism, Government of India, to promote India as a high-value, up-market tourist destination. The Ministry of Tourism also intends to use the insights from this study as inputs in designing future overseas campaigns.

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

E3. The entire study has been carried out by way of extensive secondary research followed by face to face interviews with the help of local office of The Nielsen

Company. The categories of respondents are pas and prospective outbound tourists, travel houses, Indian tourism office in Tokyo.

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 Japan has a long standing relation and is also attached by the common thread of Buddhism, awareness among Japanese nationals about India and it major tourist destinations like Golden Triangle, Varanasi, Buddhist circuit, Kerala, etc. is very high.

E4. For holidaymakers from Japan, India is a long haul destination. Japan past travellers to India on a package tour has spent around INR 2.77 lakh per person on an average while past travellers to India on a non-package tour has spent around INR 2.75 lakh per person on an average . Most of the past travellers visited India to see and experience the culture and heritage of the country. The most fascinating things to them were to enjoy the rich heritage, cultural diversity, hill stations & mountains & religious places in India.

E5. All the past travellers are aware about India through websites / internet, friends & relatives and magazines/ books on travel, but the promotional /publicity material available at various forums are not helping to plan their travel as their requirement of minute details are often not addressed. India as a destination is known to the travellers in Japan due to the past cultural connect it shares and also due to Buddhism link between both the countries, but, the awareness of India is not getting converted to travels to India. ***Incredible India*** website needs to be more focussed, in local language, product driven and clear so that travellers can decide their destination and can compare the benefit to visit India vis-à-vis other competitive countries. The Campaign should be focused more to lure the intending travellers to "Visit India "rather than simply describing India.

E6. The travellers are only aware of Buddhist circuit, Taj Mahal, Golden Triangle, therefore, more destination specific visuals/ campaigns defining the products and its unique features need to be devised and promoted. Rather than marketing India or just one state to the trade, focus should be on marketing a product /activity/ event.

Under the umbrella of brand India new tourist circuits need to be created to attract different type of travellers. Thus there is need to focus separately for the 3 different stakeholders;

E7. Trade/ Tour Operator:

Focussing on trade and forming a symbiotic relationship with trade will foster a greater number of foreign tourist visits to India. It is also suggested that more involvement of JATA and Indian tour operators are facilitated by the India Tourism Office in Tokyo 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 participate in important fairs and festivals where they can sponsor any event which will finally send a message to "*Visit India"* and not just educate travellers about India. More 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.

E8. Media:

Media is a medium that can be used to make people aware about India. Media reaches the masses and hence is a very important tool of promotion. Currently the advertisements of Incredible India campaign are not present in the local language. Also the Local channels in Japan, which are most watched by the potential travellers are not showing India Tourism advertisements. Indian tourism advertisements are currently airing on satellite channels which are not watched by regular Japanese travellers. 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. As the Japanese are very much attracted and interested in Bollywood and India's spices and different varieties of food, media can also take the help of Bollywood celebrities and famous personalities to promote India.

E9. <u>Traveller:</u>

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. Thus it is imperative to categorise the travellers from any particular country on the basis of their travel pattern and habit/ behaviour. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website. 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.

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

Short Term Measures:

- Incredible India advertisements in local language on non-satellite channels and popular print media
- India tourism website in the local language
- Inclusion of Japanese speaking staff in the India Tourism Office in Tokyo and also in the third party visa providing firm
- A visa helpdesk in the India Tourism Office in Tokyo
- Feature Incredible India advertisements on social media.
- A social media campaign of India Tourism highlighting the most liked aspects of tourism in the Japanese context.
- Organize Bollywood nights and food festivals regularly so as to pique interest of Japanese travellers about India.
- Training and providing certified Japanese 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.

- Though enough publicity material is there, but it is all out-dated, there is no mention about New India – new destinations, new products, new packages, new circuits and new luxury properties need to be promoted alongside well known destinations, so as to offer a large choice in front of prospective travellers.
- 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.

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:

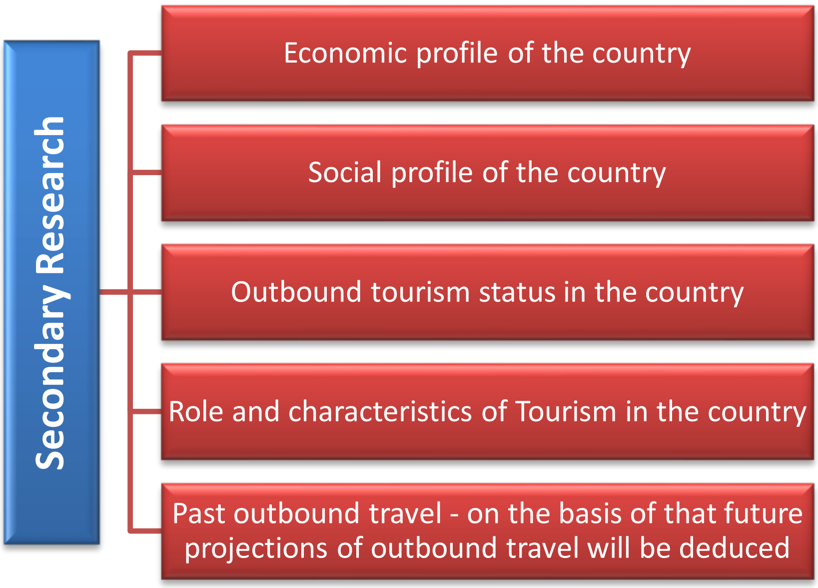
- Market/ country overview-Economic and social profile
- Outbound travel pattern in past
    - Travellers' profile
    - Preferred destinations
    - Expenditure pattern

  – Travellers to India

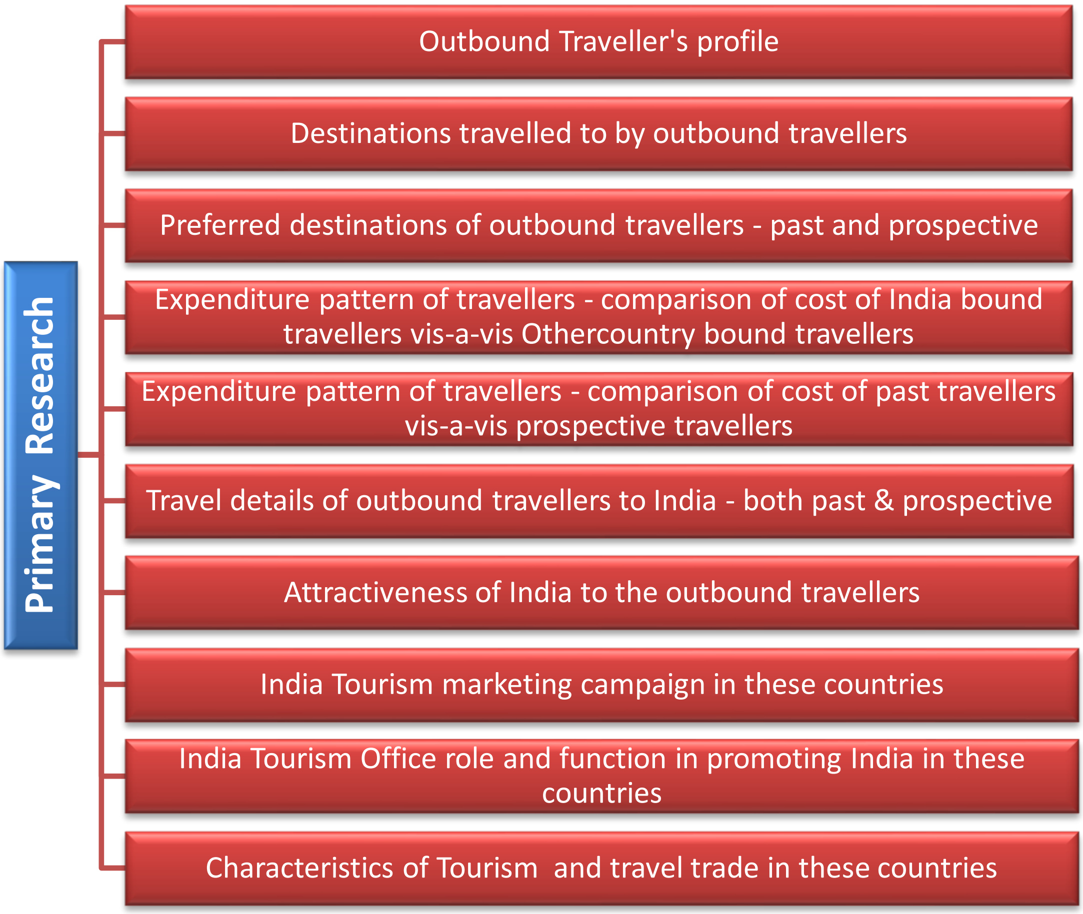
- Projections of future outbound travel
- Role and characteristics of tourism and travel trade in these countries
- Attractiveness of India for visitors from these countries
- India tourism marketing and promotion in these countries
- Suggestion of specific measures to promote India tourism in these 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	
Japan	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, Japan. 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 Japan.

1.5 Coverage

Segments

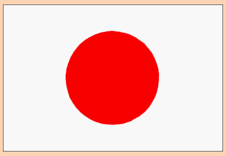
The following segments were covered by the study in Japan:

- 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 Tokyo

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

Japan 	Tokyo	2000	1. Our Local office in Tokyo 2. Local directory (2150) 3. Local tour operators (850)	Nielsen contacted 4600 respondents to achieve 3000 interviews
	Osaka	1000		
	Total	**3000**		

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

1.6 Method of Inquiry

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

- **For inhabitants of South Africa / 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 – Japan

2.1.1 Introduction

Japan, located on the Pacific Ocean, is an island country in East Asia and often called “the land of the rising sun”. Geographically, Japan is an archipelago of 6,852 islands. The four largest are Honshu, Hokkaido, Kyushu and Shikoku, which make up about ninety-seven percent of Japan's land area. Japan has a population of 126 million which is the world's tenth largest. Japanese make up 98.5% of Japan's total population. Approximately 9.1 million people live in the core city of Tokyo, the capital city of Japan, which is the fourth leading global city in the world. The Greater Tokyo Area, which includes Tokyo and several surrounding prefectures, is the world's largest metropolitan area with over 35 million residents and the world's largest urban agglomeration economy.

In the late 19th and early 20th centuries, victories in the First Sino-Japanese War, the Russo-Japanese War and World War I allowed Japan to expand its empire during a period of increasing militarism. The Second Sino-Japanese War of 1937 expanded into part of World War II in 1941, which came to an end in 1945 following the atomic bombings of Hiroshima and Nagasaki. Since adopting its revised constitution in 1947, Japan has maintained a unitary constitutional monarchy with an Emperor and an elected legislature.

Japan has the world's third-largest economy by nominal GDP and the world's fourth-largest economy by purchasing power parity. It is also the world's fourth-largest exporter and fourth-largest importer. Although Japan has officially renounced its right to declare war, it maintains a modern military with the world's eighth largest military budget, used for self-defence and peacekeeping roles. Japan is a developed country with a high standard of living and Human Development Index whose population enjoys the highest life expectancy, the third lowest infant mortality in the world and ranked first in the number of Nobel Laureates of any country in Asia.

2.1.2 Social Profile

Japan is country comprising of culture that can be traced back by centuries and is also very distinct from that of other cultures in the world. Japan is known to the world as the land of the Samurai and also of Buddism. Buddhism was first introduced to Japan from Baekje of Korea, but the subsequent development of Japanese Buddhism was primarily influenced by China. Despite early resistance, Buddhism was promoted by the ruling class and gained widespread acceptance beginning in the period of King Asoka of India.

The Second World War marks the great twist in Japan's course as it was part of Axis powers of Germany and Italy. On December 7–8, 1941, Japanese forces carried out surprise attacks on Pearl Harbor, attacks on British forces in Malaya, Singapore, and Hong Kong and declared war, bringing the US and the UK into World War II in the Pacific. After the Soviet invasion of Manchuria and the atomic bombings of Hiroshima and Nagasaki in 1945, Japan agreed to an unconditional surrender on August 15. The war cost Japan and the rest of the Greater East Asia Co-Prosperity Sphere millions of lives and left much of the nation's industry and infrastructure destroyed. The Allies (led by the US) repatriated millions of ethnic Japanese from colonies and military camps throughout Asia, largely eliminating the Japanese empire and restoring the independence of its conquered territories.

In 1947, Japan adopted a new constitution emphasizing liberal democratic practices. The Allied occupation ended with the Treaty of San Francisco in 1952 and Japan was granted membership in the United Nations in 1956. Japan later achieved rapid growth to become the second-largest economy in the world, until surpassed by China in 2010. This ended in the mid-1990s when Japan suffered a major recession. In the beginning of the 21st century, positive growth has signaled a gradual economic recovery. On March 11, 2011, Japan suffered the strongest earthquake in its recorded history; this triggered the Fukushima Daiichi nuclear disaster, one of the worst disasters in the history of nuclear power.

Japan's population is estimated at around 127 million, with 80% of the population living on Honshū. Japanese society is linguistically and culturally homogeneous, composed of 98.5% ethnic Japanese, with small populations of foreign workers. Zainichi Koreans, Zainichi Chinese, Filipinos, Brazilians mostly of Japanese descent, and Peruvians mostly of Japanese descent are among the small minority groups in Japan. Japan has the second longest overall life expectancy at birth of any country in the world: 84.4 years for (2015 estimate).[1] The Japanese population is rapidly aging as a result of a post–World War II baby boom followed by a decrease in birth rates. The changes in demographic structure have created a number of social issues, particularly a potential decline in workforce population and increase in the cost of social security benefits like the public pension plan. A growing number of younger Japanese are not marrying or remain childless.

2.1.3 Urban/ Rural Population

Japan is a majorly urbanized population with 93.5% of the total population (2015) living in urban areas. Major urban areas, with respect to population, are Tokyo, Osaka-Kobe, Nagoya, Kitakyushu-Fukuoka, Shizuoka-Hamamatsu and Sapporo (2015). [2]

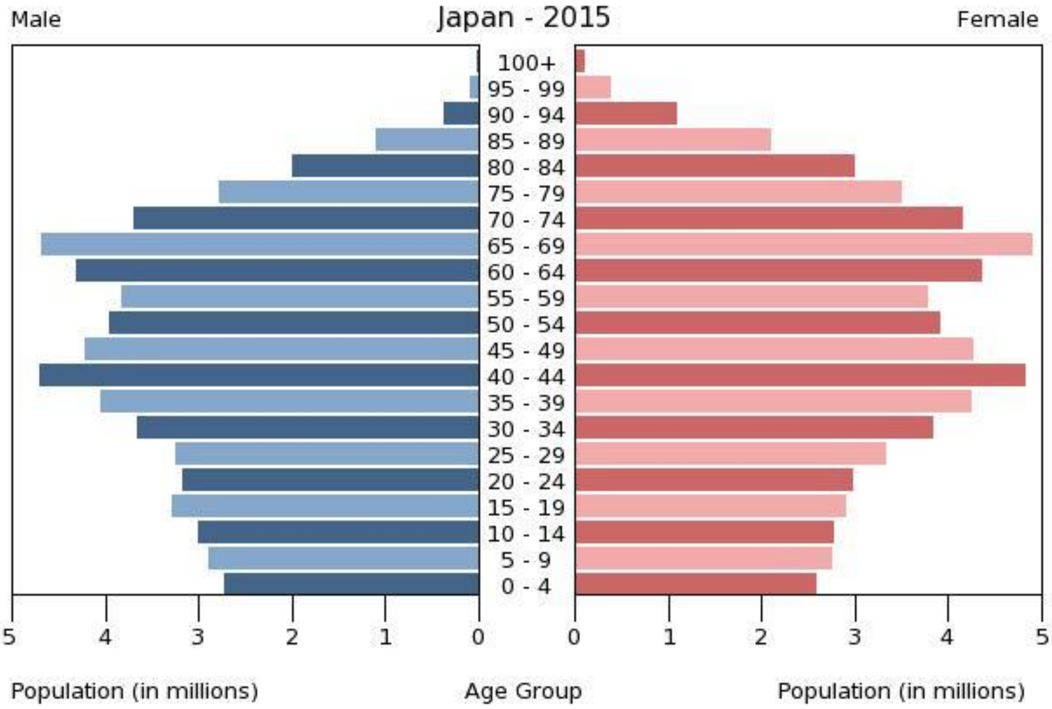
2.1.4 Gender Statistics

As per the World Population Prospects (By United Nations), in 2015 the country's population was 126,573,481, of which 61,558,578 were male and 65,014,903 were female.[3]

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

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

[1] Source: CIA World Factbook
[2] Source: CIA World Factbook.
[3] http://worldpopulationreview.com/countries/japan-population/
[4] CIA World Factbook



2.1.5 Prominent Religious Groups

Japan has full religious freedom based on Article 20 of its Constitution. Upper estimates suggest that 84–96 percent of the Japanese population subscribe to Buddhism or Shinto, including a large number of followers of a syncretism of both religions. However, these estimates are based on people affiliated with a temple, rather than the number of true believers.

Fewer than one percent of Japanese are Christian. Other minority religions include Islam, Hinduism, Sikhism, and Judaism, and since the mid-19th century numerous new religious movements have emerged in Japan.

As per the CIA World Factbook, Shintoism is practiced by 79.2% of the population, Buddhism by 66.8% of the population, Christianity by 1.5% of the population and other religions by 7.1% of the population. Total adherents exceed 100% because many people practice both Shintoism and Buddhism (2012 estimate). [5]

[5] Source: CIA World Factbook

2.1.6 Age Distribution

The age distribution of the population of Japan 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	13.11%	8,582,648	8,051,706
2	15-24 years	9.68%	6,436,948	5,846,808
3	25-54 years	37.87%	23,764,421	24,297,773
4	55-64 years	12.76%	8,104,835	8,084,317
5	65 years and over	26.59%	14,693,811	19,056,392 [6]

2.1.7 Literacy

Literacy level in the country of Japan is defined as people who can read and write above the age of 15. The total percentage of literates in Japan is 99% of the total population. The literacy levels amongst male population are also 99% and the literacy level amongst the female population is also cited as 99% of the total population. The data is as per the period from 1995 - 2004.[7]

2.1.8 Economic Profile

Over the past 70 years, government-industry cooperation, a strong work ethic, mastery of high technology, and a comparatively small defence allocation (1% of GDP) have helped Japan develop an advanced economy. Scarce in many natural resources, Japan has long been dependent on imported raw materials. Since the complete shutdown of Japan's nuclear reactors after the earthquake and tsunami disaster in 2011, Japan's industrial sector has become even more dependent than it was previously on imported fossil fuels. A small agricultural sector is highly subsidized and protected, with crop yields among the highest in the world. While self-sufficient in rice production, Japan imports about 60% of its food on a caloric basis.

[6] Source: CIA World Factbook
[7] Source: http://www.unesco.org/uil/litbase/?menu=14&programme=131

Measured on purchasing power parity (PPP) basis, that adjusts for price differences, Japan in 2015, stood as the fourth-largest economy in the world after first-place China, which surpassed Japan in 2001, and third-place India, which edged out Japan in 2012.

Unemployment rate is 3.3% (2015 estimate). Japan is among the world's largest and most technologically advanced producers of motor vehicles, electronic equipment, machine tools, steel, nonferrous metals, ships, chemicals, textiles and processed foods.[8]

2.1.9 Gross Domestic Product (GDP)

South Africa's GDP (purchasing power parity) in 2015 (estimate) was US$ 4.658 Trillion. Japan ranks 5th in terms of country GDP in the world. The GDP growth rate for Japan (2015 estimate) is 0.6%. The PPP of South Africa stands at US$ 38,200 (2015 estimate).[9] The service sector accounts for three quarters of the gross domestic product.

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

Year (est.)	USD
2015	US$ 4.658 Trillion
2014	US$ 4.631 Trillion
2013	US$ 4.613 Trillion
Source: https://www.cia.gov	

2.1.10 Per Capita Income/ Spending Power

Japan ranks 42nd in the world with regards to purchasing power parity.

Table 6: Japan GDP (purchasing power parity)

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

[8] Source: CIA World Factbook
[9] Source: CIA World Factbook

2015	USD 38,200
2014	USD 36,400
2013	USD 36,200
Source: https://www.cia.gov	

2.2 Tourism Overview

2.2.1 General Overview

Japan has 19 World Heritage Sites, including Himeji Castle, Historic Monuments of Ancient Kyoto and Nara. Popular foreigner attractions include Tokyo and Hiroshima, Mount Fuji, ski resorts such as Niseko in Hokkaido, Okinawa, riding the shinkansen and taking advantage of Japan's hotel and hot spring network.

Domestic tourism remains a vital part of the Japanese economy and Japanese culture. Children in many middle schools see the highlight of their years as a visit to Tokyo Disneyland or perhaps Tokyo Tower, and many high school students often visit Okinawa or Hokkaido. The extensive rail network together with domestic flights sometimes in planes with modifications to favor the relatively short distances involved in intra-Japan travel allows efficient and speedy transport. In inbound tourism, Japan was ranked 28th in the world in 2007. In 2009, the Yomiuri Shimbun published a modern list of famous sights under the name Heisei Hyakkei (the Hundred Views of the Heisei period).

Neighboring South Korea is Japan's most important source of foreign tourists. In 2010, the 2.4 million arrivals made up 27% of the tourists visiting Japan. Chinese travelers are the highest spenders in Japan by country, spending an estimated 196.4 billion yen (US$2.4 billion) in 2011, or almost a quarter of total expenditure by foreign visitors, according to data from the Japan Tourism Agency.[10]

After the triple melt-down of the nuclear reactors in Fukushima, the number of foreign visitors declined for months. In September 2011 some 539,000 foreign people visited Japan, this was 25 percent down compared with the same month in 2010. This decline was largely attributed to the Fukushima nuclear accident and the stronger yen made a visit to Japan more expensive. To boost tourism the Japanese Tourism Agency announced in October 2011 a plan to give 10,000 round-trip air tickets to Japan to encourage visitors to come.

2.2.2 Inbound Travel

Number of foreign visitors to Japan increased to 8.36 million (ranked 33rd (8th in Asia) from 6.22 million (ranked 39th (10th in Asia) in 2011, the year of the great East Japan earthquake, which rose both in number and ranking. Foreign visitors to Japan in 2013 were 10.36 million, a year-on-year increase of 24.0%.

Because Japan is an island country, incoming routes from overseas is limited to air and sea. The number of foreign visitors to Japan by air or sea in 2013 was a 10.36 million, a year-on-year increase of 24.0% from 2012 by air or sea. International tourism expenditure in Japan increased to 27.9 billion dollars (ranked 8th (second in Asia)) from 27.2 billion dollars (ranked 9th (second in Asia)) in 2011, which rose both in amount and ranking. Japan's international tourism revenue in 2013 was 15.1 billion dollars, a year-on-year increase of 3.8%, which is of the same level as 20th in the international tourism revenue ranking in 2012.

When looking at annual foreign visitors to Japan by countries and regions, a total of ten countries and regions including eight Asian countries and regions (Taiwan, Hong Kong, Singapore, Thailand, Malaysia, Indonesia, Vietnam, and India), Australia, and France, reached peak records. [11]

[10] Source: Wikipedia
[11] Source: http://www.mlit.go.jp/common/001064757.pdf

Figure 2: Foreign Tourists to Japan (2003 till May 2015)

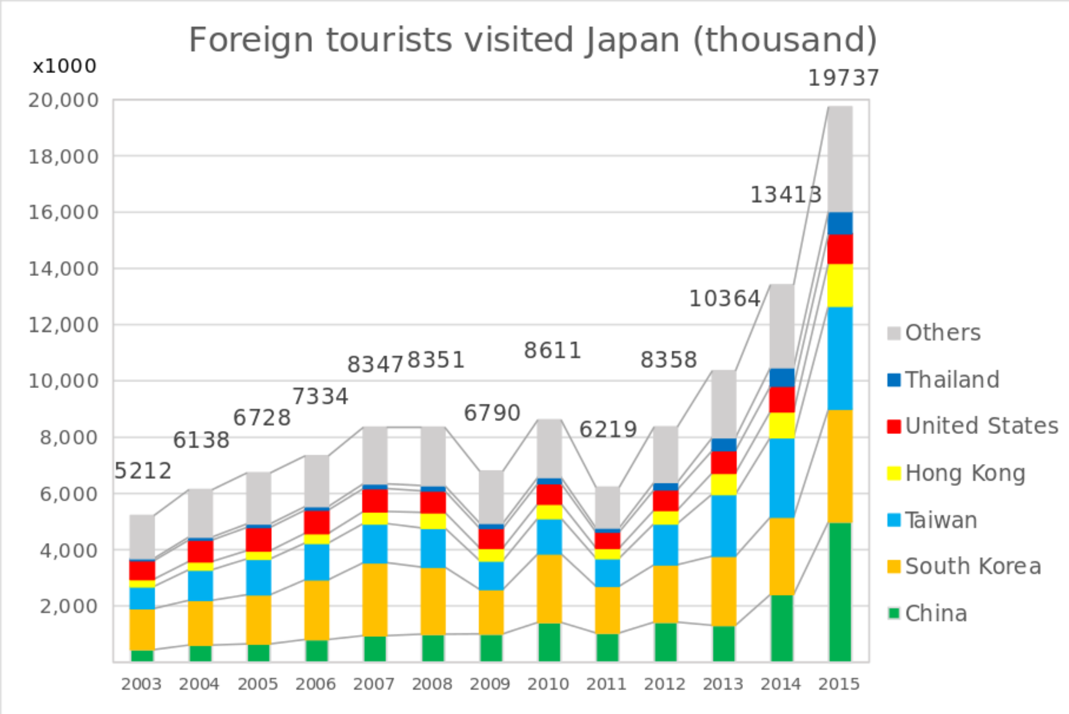


Table 7: Foreign Tourist Arrivals (in thousands)

Year	Foreign Tourist Arrivals (in ten thousands)[12]
2008	835.1
2009	679
2010	861.1
2011	621.9
2012	835.8
2013	1036.4

2.2.3 Seasonality of Tourism

Three peak holiday periods occur in Japan: Golden Week (spring), Obon (summer), and end of the year into the first week of the New Year. Golden Week, generally a popular time to travel abroad, occurs at the end of April/early May, during which four Japanese public holidays can be extended into a five-to-nine day vacation. The summer Obon holiday occurs around August 15. Since the longest school holiday of the year also occurs at this time, August is the peak month for all Japanese travel. Many Japanese

[12] Source: http://www.mlit.go.jp/common/001064757.pdf

companies and organizations also close during the last week in December until just after the New Year for the year-end holidays, making it a very popular time to travel abroad.

2.2.4 Outbound Travel

The number of Japanese traveling overseas in 2013 fell to 17.47 million (a year-on-year decrease of 5.5%) for the first time in four years after achieving the highest number of travellers in the previous year. This was due to the impact from recent issues in Japan-China and Japan-Korea relations as well as the yen depreciation generating an expensive feeling of cost including travel and local shopping. In Asia, Japan is ranked just behind China in terms of the number of outbound travellers. Number of overseas travellers is expected to increase 0.4% to 17.0 million and total expenditure on overseas travel to increase 2.4% to 4,740 billion yen in 2015.

Table 8: Departure (in thousands)

Year	Departures (in ten thousands)[13]
2008	1599
2009	1545
2010	1664
2011	1699
2012	1849
2013	1747

2.2.5 Preferred Outbound Destinations

Preferred destinations for travellers from Japan are South Korea, China, Taiwan, Hong Kong, Macau, Thailand, Malaysia, Singapore, Philippines, Indonesia, Vietnam, Canada and USA, etc.

2.2.6 Domestic Tourism in South Africa

[13] Source: http://www.mlit.go.jp/common/001064757.pdf

The number of domestic overnight trips taken by Japanese citizens per capita in 2013 was 1.43 times (a year-on-year increase of 5.9%; preliminary value). The number of overnight stays on domestic trips taken by Japanese citizens per capita was 2.35 nights (a year-on-year increase of 9.8%; preliminary value). The number of domestic overnight trips and the number of overnight stays on domestic trips taken by Japanese citizens per capita has been decreasing until 2011 but has been on the increasing trend since then. The transition of travelers from overseas to domestic travel due to the yen depreciation generating an expensive feeling of travel cost is considered to have been a major factor. Events such as the recognition of the Shikinen Sengu of Ise Jingu and Mt. Fuji as World Heritage sites, etc., have contributed to generating domestic travel demands. The number of same-day trips was 211.55 million times (a 8.0% increase), and overnight trips was 181.91 million times (a 5.9% increase), which has been increasing since 2011.[14]

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.

While growing affluence and falling real travel costs have been primary reasons for the surge in post-1970s international travel, changes in government travel policies have also played an important role. Japan is one example of this phenomenon. Japanese citizens were prohibited from traveling abroad for

[14] Source: http://www.mlit.go.jp/common/001064757.pdf

pleasure until after the Tokyo Olympics in 1964, and currency restrictions on foreign travel remained in effect until the late 1970s. In the late 1980s, the Japanese government actively encouraged travel abroad and, by 1989, Japan led the world in international tourism spending. It currently sits in eighth place.[15]

Japan's resource base for tourism is phenomenal. The country's tourism attractiveness lays in its diversity, climate and the world heritage sites it possesses. The main characteristic of the world heritage sites in Japan is that many of them are supported by the country's diverse natural environment and its climate with four seasons, for which there are few equals in the world. There are also sites such as the Atomic Bomb Dome (Hiroshima Peace Memorial), which remind people of the negative legacy that should never be forgotten. Among the sites of historical cultural heritage, there are many buildings influenced by the unique sensitivities of the Japanese people, and in experiencing the precision and the dynamic design, we obtain great insight into the mind-set of the Japanese people and the roots of their culture.

It used to be that only developing countries actively pursued tourism exports as a key development strategy. Japan and the United States, for example, have historically paid little attention to luring tourists to their shores. This is no longer the case. Recently, both countries have implemented policy changes and relaxed visa regulations to promote inbound foreign travel, create jobs, and stimulate their sluggish economies. In 2013, Japan hosted 10 million foreign visitors—an all-time high. It hopes to double that number by the Tokyo Summer Olympics in 2020, and reach 30 million by 2030. The Japan National Tourism Organization (JNTO) is the primary organization that is involved in a broad range of activities promoting travel to Japan through various activities overseas as well as tourism-promoting activities in Japan. JNTO's activities include:

- Operating Tourist Information Centres in Japan for foreign visitors
- Arranging reception facilities for foreign visitors
- Promoting international conventions and trade fairs
- Operating offices in key cities around the world
- Conducting tourism-related research

[15] Source: http://journal.georgetown.edu/the-growing-importance-of-tourism-in-the-global-economy-and-international-affairs/

- Publishing travel literature and videos about Japan.

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

The contribution of the tourism industry to the overall Japanese economy is equal to the leading and typical industries such as automobile and electric machinery. The share of tourism industry in total GDP was 2.2% in 2000, whereas the automobile industry was 2.3%, telecommunication 2.0%, electricity 1.9%, and agriculture 1.5% respectively. The share of tourism industry in total employment was 2.9% in 2000, compared with government employee 3.2%, electric machinery 3.0%, finance/insurance 3.0%, and food industry 2.3%. As the tourism market continues to grow steadily, tourism industry is expected to become the leading industry of Japan throughout the 21st century. The contribution of the Japanese tourism industry to its national economy, however, has been relatively small compared to foreign countries.

The direct contribution of Travel & Tourism to GDP was JPY 11,900.6bn (2.4% of total GDP) in 2014, and is forecast to rise by 3.3% in 2015, and to rise by 2.0% per annum, from 2015-2025, to JPY 14,994.5bn (2.8% of total GDP) in 2025. This primarily reflects the economic activity generated by industries such as hotels, travel agents, airlines and other passenger transportation services (excluding commuter services). But it also includes, for example, the activities of the restaurant and leisure industries directly supported. The total contribution of Travel & Tourism to GDP was JPY 36,322.8bn (7.5% of GDP) in 2014, and is forecast to rise by 2.6% in 2015, and to rise by 1.6% pa to JPY 43,789.2bn (8.1% of GDP) in 2025. In 2014 Travel & Tourism directly supported 1,152,500 jobs (1.8% of total employment). This is expected to rise by 6.0% in 2015 and rise by 0.7% pa to 1,312,000 jobs (2.2% of total employment) in 2025.

In 2014, the total contribution of Travel & Tourism to employment, including jobs indirectly supported by the industry, was 7.0% of total employment (4,441,500 jobs). This is expected to rise by 4.4% in 2015 to 4,637,000 jobs and rise by 0.5% pa to 4,857,000 jobs in 2025 (8.0% of total).

Visitor exports generated JPY 1,968.2bn (2.3% of total exports) in 2014. This is forecast to grow by 6.8% in 2015, and grow by 4.5% pa, from 2015-2025, to JPY 3,271.6bn in 2025 (2.5% of total). Travel & Tourism investment in 2014 was JPY 3,341.8bn, or 3.1% of total investment. It should rise by 2.0% in 2015, and rise by 1.7% pa over the next ten years to JPY 4,018.1bn in 2025 (3.2% of total).[16]

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.

As of February 2012, Japan had 98 total airports, with 28 operated by the central government, and 67 by local governments. Nearly all major airlines and airports offer flights to Japan. The country's own two leading airlines, Japan Airlines (JAL) and All Nippon Airways (ANA), both serve a broad range of international destinations. Japan's most important international airport is Tokyo's Narita Airport, followed by Osaka's Kansai Airport, Tokyo's Haneda Airport and Nagoya's Central Japan Airport. Japan's next largest international

[16] Source: https://www.wttc.org/-/media/files/reports/economic%20impact%20research/countries%202015/japan2015.pdf & https://www.oecd.org/japan/33649824.pdf

airport is Fukuoka Airport, which links the city with several Asian destinations. Many other Japanese airports have a small number of international flights, mainly to Korea and China.

There are direct flights between India and Japan between Delhi to Tokyo and Mumbai to Tokyo. Besides this, there are indirect flights connecting the metros of India and other cities of Japan. Air India, Japan Airlines, Jet Airways and ANA operate these direct flights between India and Japan.

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

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

Table 9: Flight Prices

Fare in Indian rupees for travel from top India destinations to Tokyo, as on April 22, 2016	
Tokyo	
(Indian Rupees)	Lowest prices
Mumbai	42,514
Delhi	36,959
Source: http://www.skyscanner.in	

2.3.5 Hotel Prices

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

Table 10: Hotel Prices

Relative prices of hotels in India and other countries (March 31, 2016)	
Country	Price Range (for a night)
India (Delhi)	Rs. 329 to Rs. 33,527
Thailand (Bangkok)	Rs. 323 to Rs. 76,421
South Africa (Johannesburg)	Rs. 701 to 18,592

Canada (Ottawa)	Rs. 1551 to 16,501
USA (New York City)	Rs. 2480 to Rs. 64,897
South Korea (Seoul)	Rs. 1144 to 44,346
UK (London)	Rs. 1399 to 118,841
Japan (Tokyo)	Rs. 1669 to 82,643
Turkey (Istanbul)	Rs. 1572 to 37,392
Germany (Berlin)	Rs. 643 to 19,532
Russia (Moscow)	Rs. 237 to 40,071
Source: http://www.skyscanner.in	

Chapter Three

Past Outbound Travellers – Survey Findings

3.1 Past Outbound Travel Behavior

3.1.1 Profiling Information

3.1.1.1 Place of Residence

The survey investigated 2000 respondents (persons who have travelled abroad in the last one year) from Japan of which 75% of the travellers were from the capital Tokyo and 25% from Osaka.

Figure 3: Distribution of Past Travellers by Place of Residence

Map Source: japanmap.facts.co

3.1.1.2 Age categories

43.9% of the respondents were in the age group of 36 to 50 years. 17.7% of the respondents were between 26 to 35 years of age. Overall, 62% of the respondents were in their peak productive years between 26 and 50 years of age.

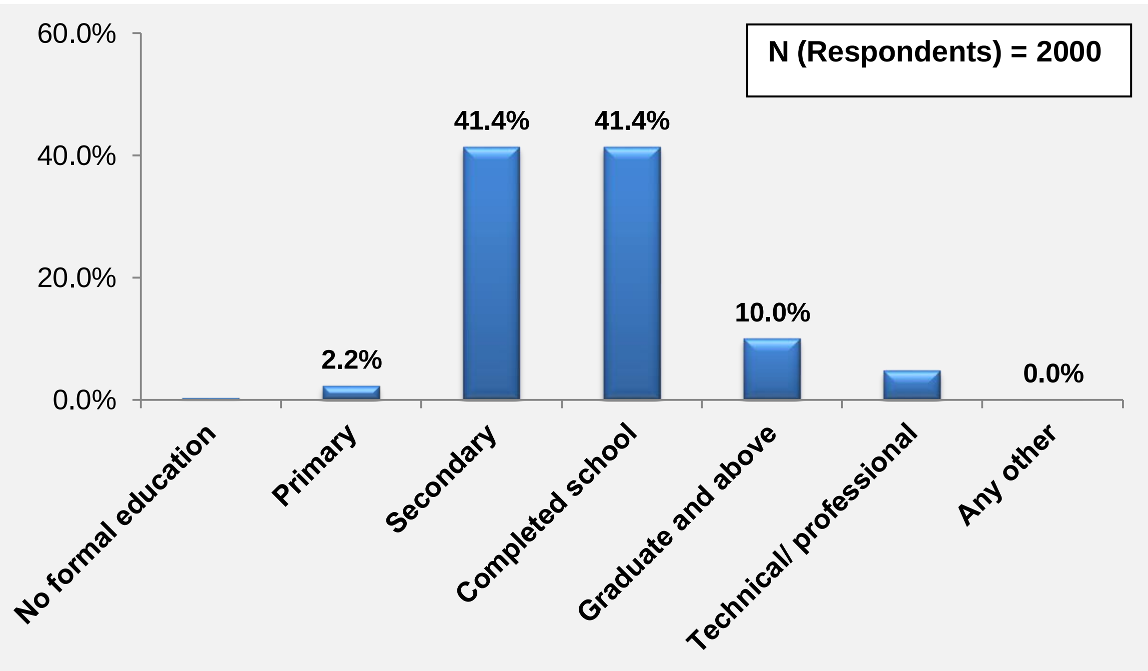
Table 11: Age Distribution

Age categories	No. of respondents	Percentage
Below 18 yrs	0	0.0%
18-25 yrs	115	5.7%
26-35 yrs	354	17.7%
36-50 yrs	878	43.9%
51-60 yrs	653	32.7%
Above 61 yrs	0	0.0%
Total	**2000**	**100%**

3.1.1.3 Educational Qualification of Respondents

41% respondents mentioned that they had completed school while 10% respondents out of the total 2000 past travellers to India and other countries mentioned that they had graduation degrees.

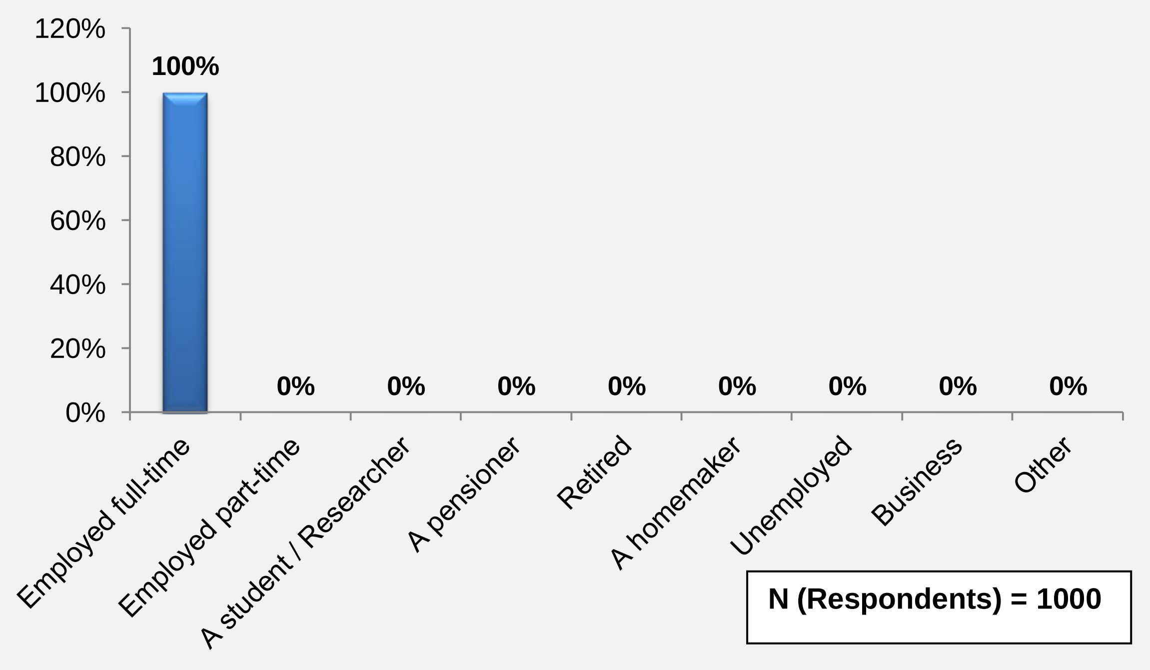
Figure 4: Educational Qualification of Respondents



3.1.1.4 Employment status of Past Travellers to India

100% respondents were employed full time.

Figure 5: Employment Status of Respondents



3.1.1.5 Gender

Women constituted about 12.5% of the survey participants. Overall, 249 women (past travellers) were interviewed during the primary survey across the six cities.

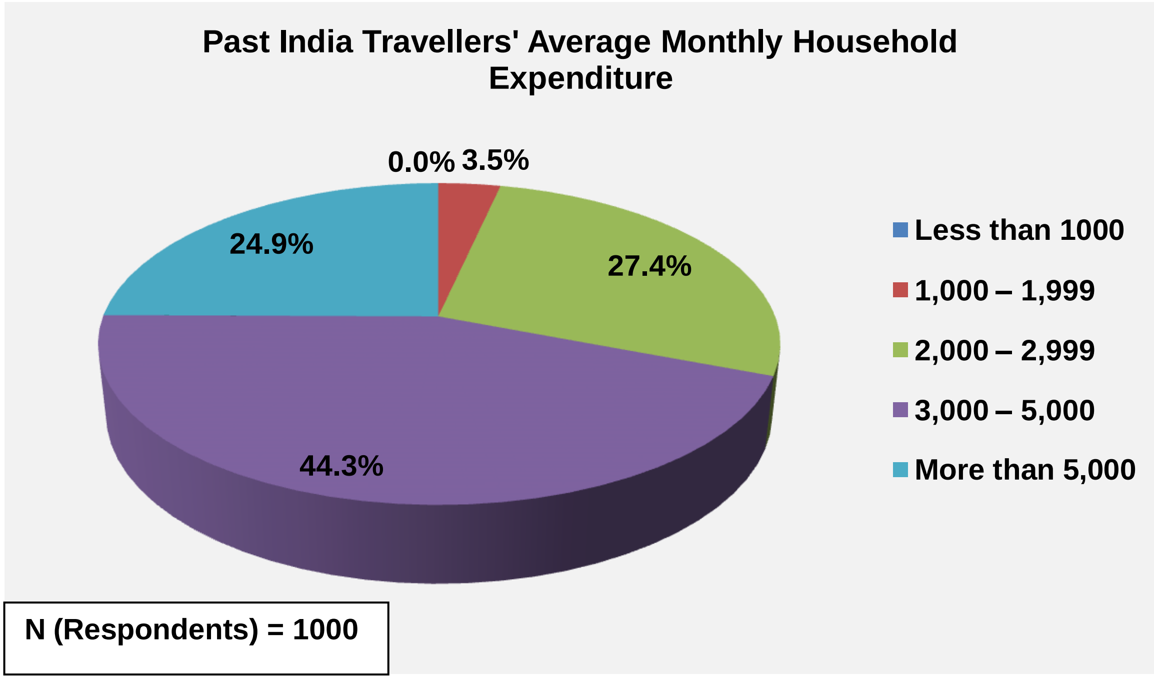
Table 12: Gender Distribution

Gender	No. of respondents	Percentage
Male	1751	87.5%
Female	249	12.5%
Total	**2000**	**100%**

3.1.1.6 By Average Monthly Household Expenditure of Past Travellers to India

44% 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 24.9%.

Figure 6: Categorizing Past India Respondents by monthly household expenditure in US$

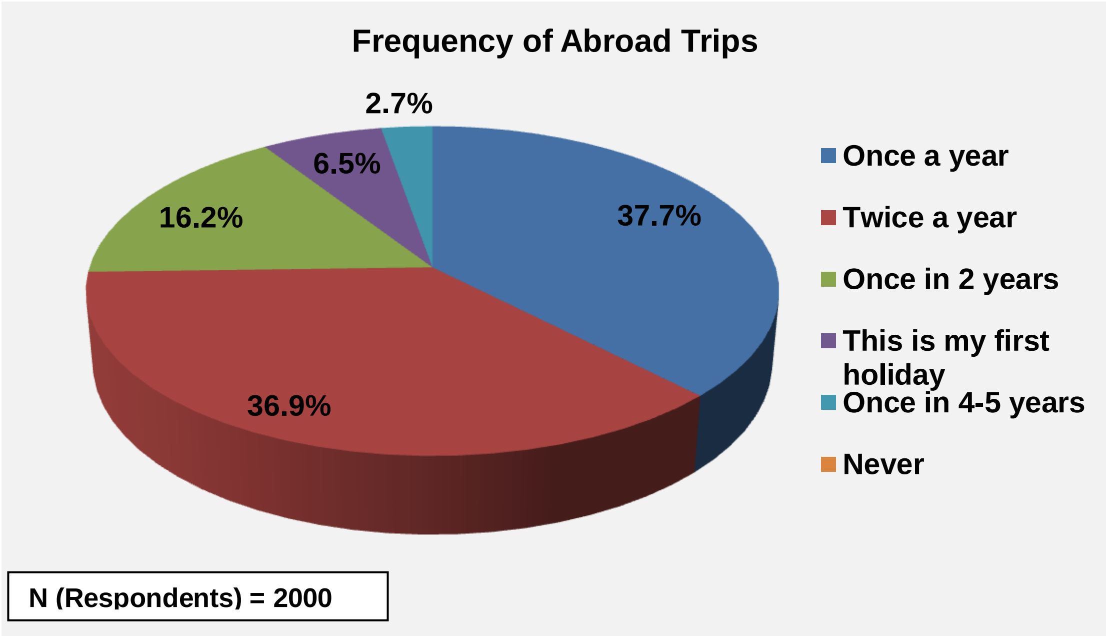


3.1.2 General Travel Behaviour

3.1.2.1 Frequency of trips abroad

Of the 2000 persons surveyed, 37.7% travel once a year. A substantive 36.9% travel several times in a year. 16.2% of respondents travelled once in two years.

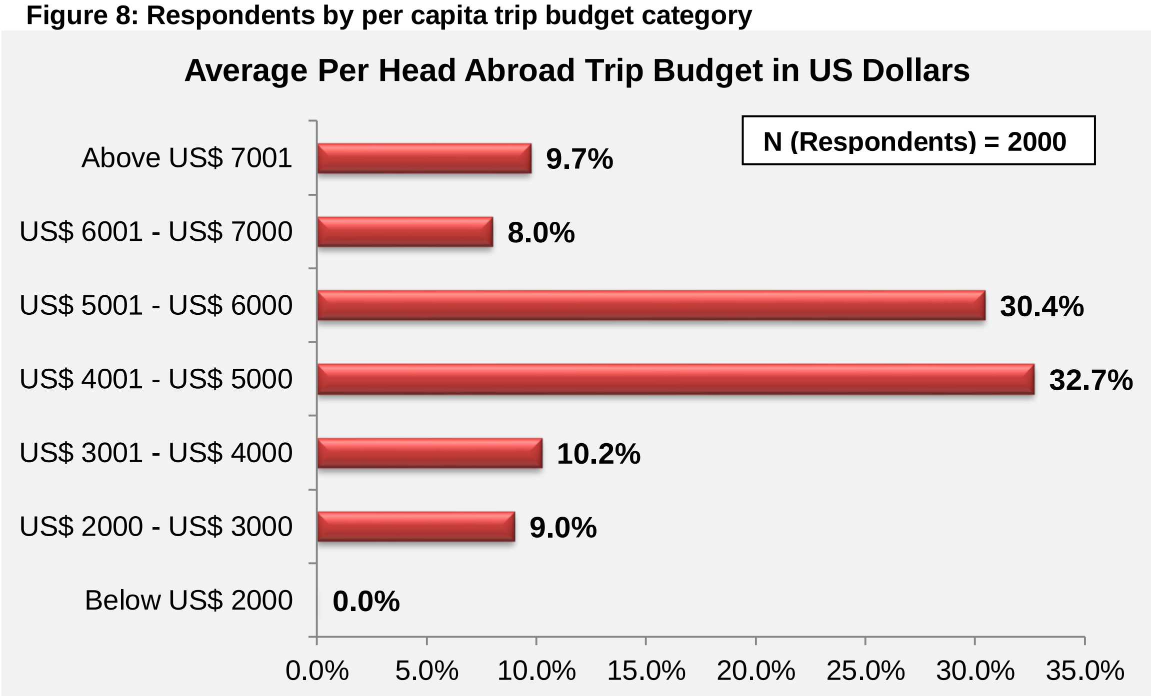
Figure 7: Respondents categorized by frequency of trips abroad



3.1.2.2 Average expenditure on trips

32.7% of the total 2000 travellers surveyed had a trip budget of US$ 4001 – US$ 5000 per head for a foreign trip. Another 10.2% budgeted in the range of US$ 3001– US$ 4000 per traveller. 9.7% of the respondents had an average budget of over US$ 7001 per head for an overseas trip.

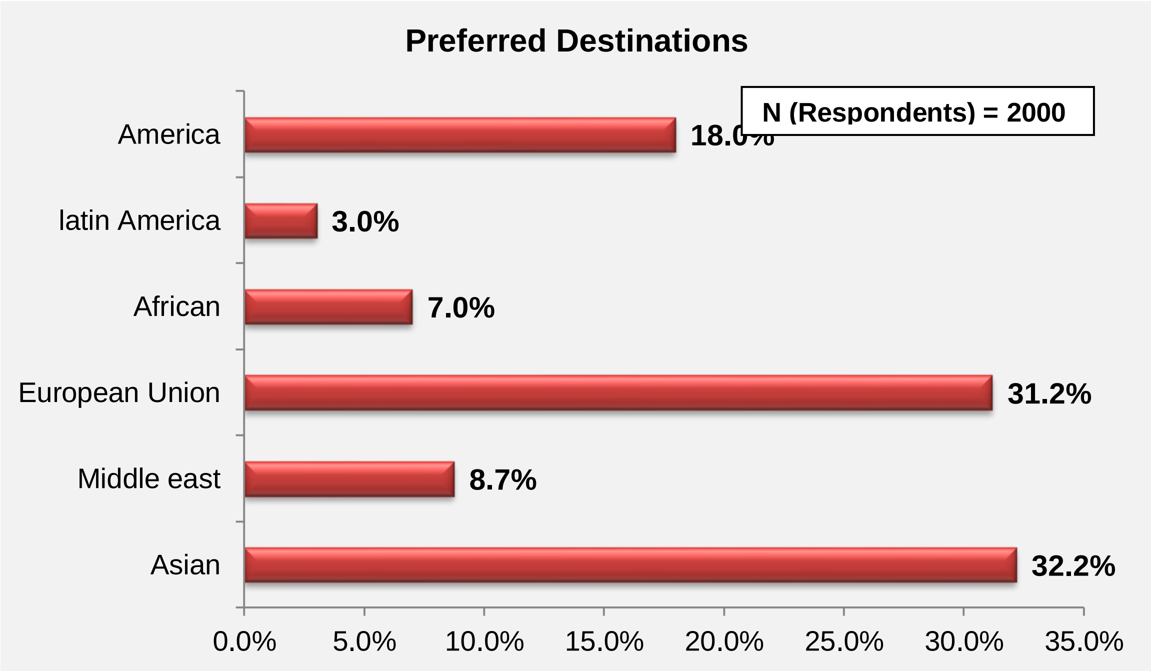
Figure 8: Respondents by per capita trip budget category



3.1.2.3 Preferred destinations

Respondents were asked to indicate their preferred foreign destinations for trips. In this analysis it was found that 32% of the responses were in favour of Asian destinations while another 31% responses showed in the inclination for EU. Of the 2000 responses received from 2000 respondents, 18% were in favour of countries in the North American continent while 7% respondents showed preference for African countries.

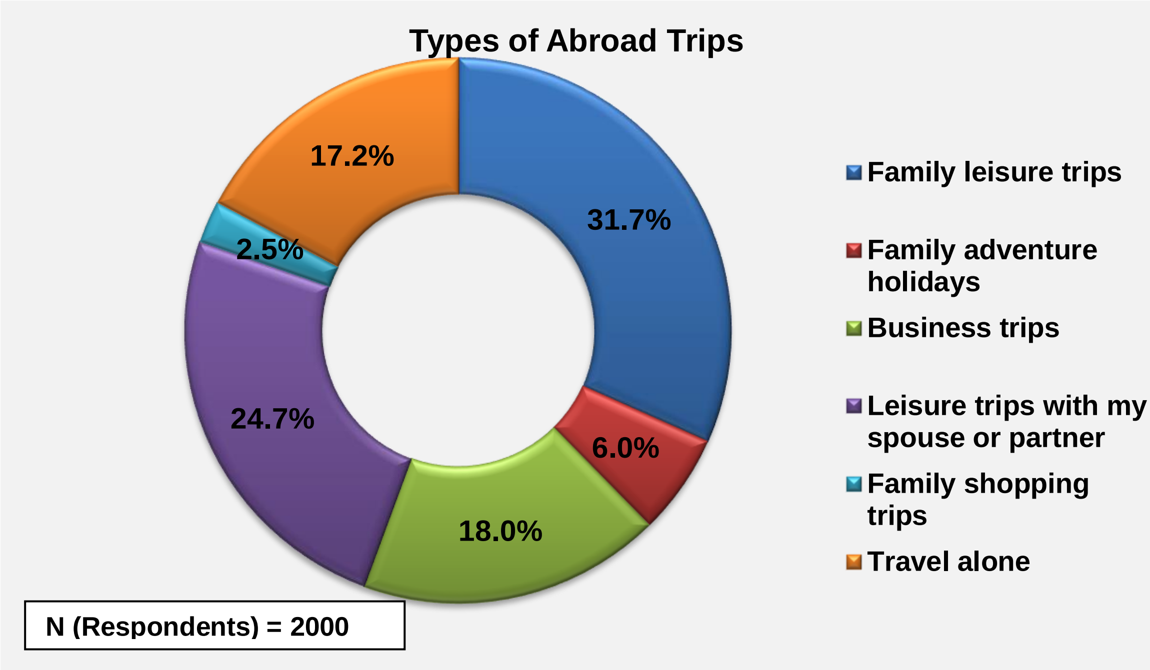
Figure 9: Revealed preferences for foreign destinations



3.1.2.4 Types of trip

31.7% of all 2000 respondents described their overseas trips in the last one year as family leisure trips. Around 18% claimed that they had travelled on business trips. 6% also enjoyed adventure holidays with their families. 24.7% of the total 2000 respondents claimed that they went on a leisure trip with their spouse or partner.

Figure 10: Respondents categorized by frequency of trips abroad



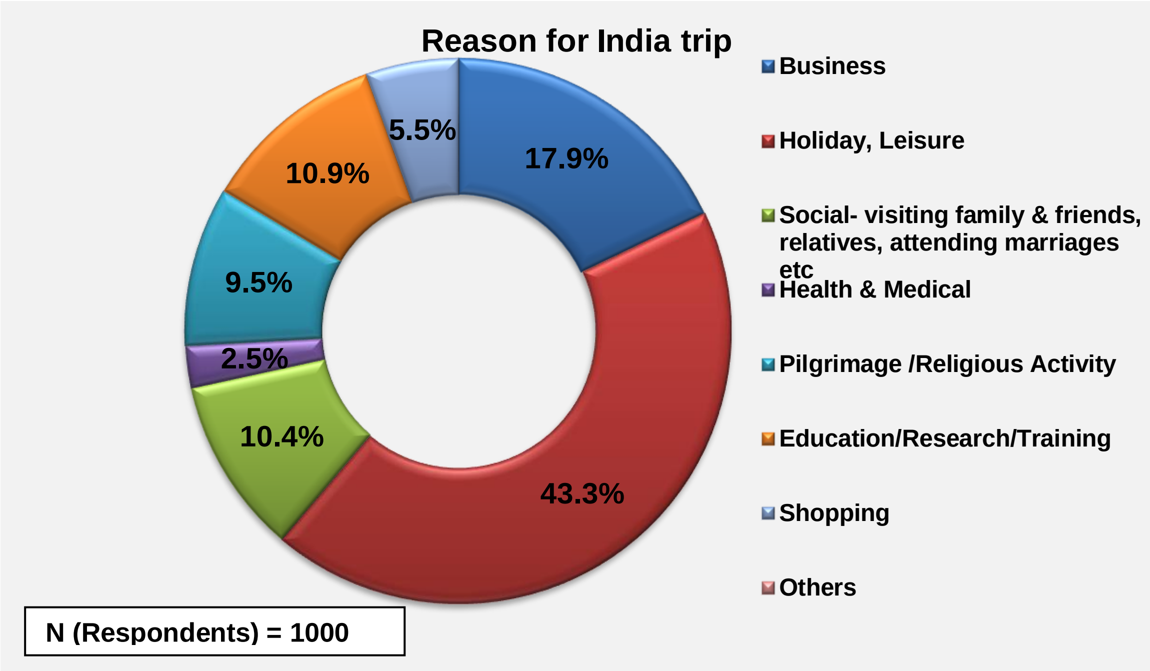
3.1.3 Travel Behaviour of Past Visitors to India

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 Japan exists because of the holidays and leisure activities that can be done here. 43.3% of total 1000 respondents indicated this. Other important reasons for travelling to India are business and professional activities (17.9% of the total 1000 respondents). 5.5% responses were received in favour of shopping purposes.

Figure 11: 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 Japan exists because of the culture and heritage that India offers. 15% each of total responses indicated this. Other important reasons for choosing India as a travel destination are hill stations/ mountains in India (10% of the total responses), religious places (10% of responses) and variety of food (9% of total responses received).

Figure 12: Reason for choosing India

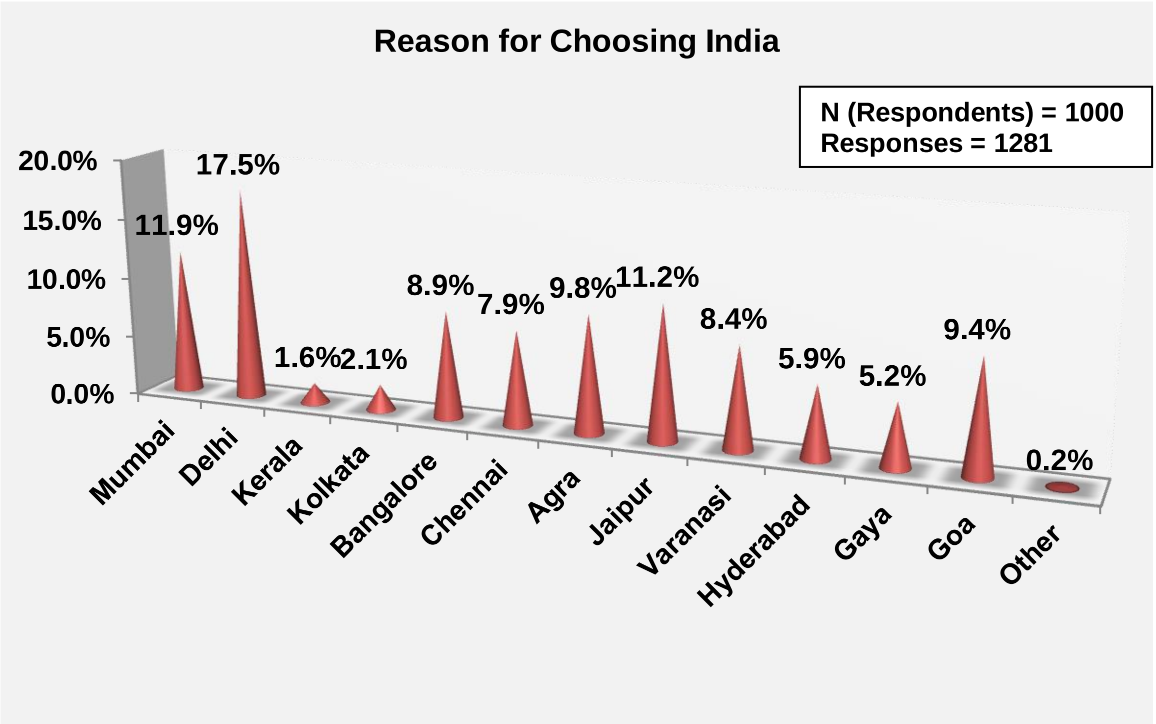
3.1.3.3 Respondent's Medical Tourism Details in India

None of the respondents, who travelled to India in the past, mentioned that they did not visit India for Medical Tourism purposes.

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 1281 responses regarding the cities in India they visited during their India trip. 17.5% of the total responses were received in favour of Delhi which came up as the most visited city in India by past Japanese travellers to India. The next most visited city in India emerged as Mumbai with 11.9% of total responses received.

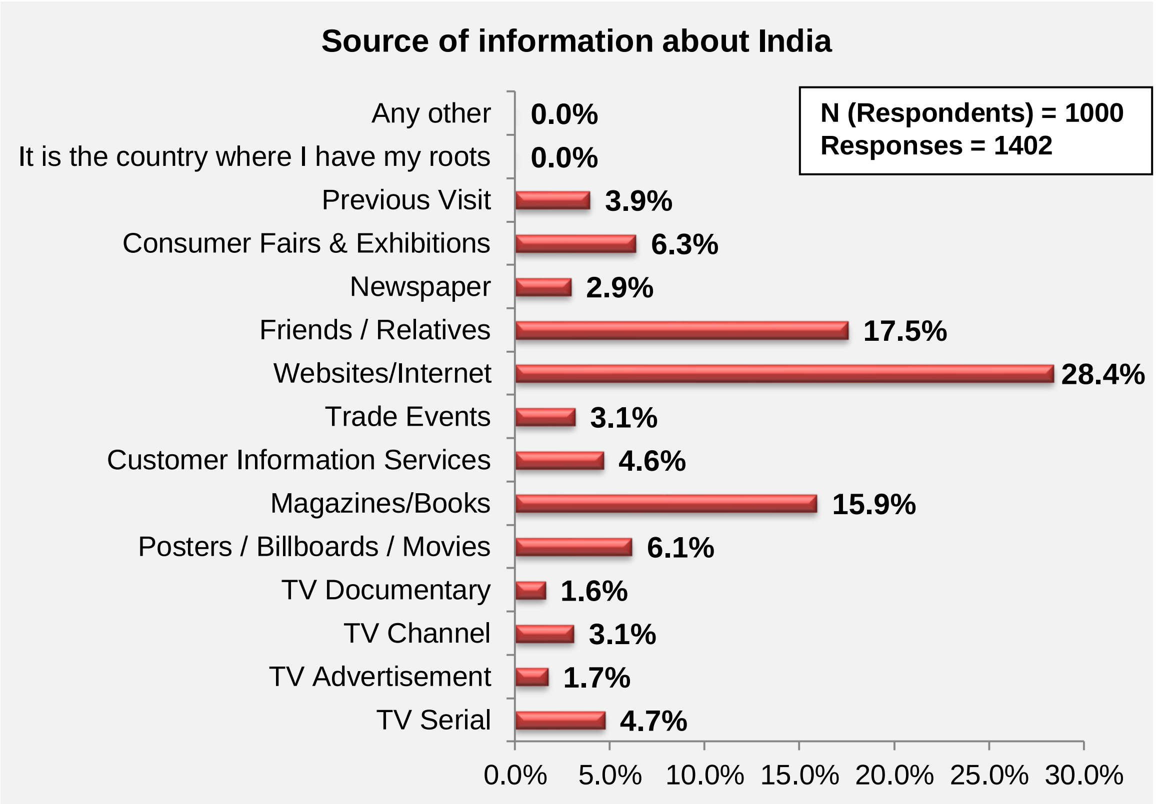
Figure 13: Cities Visited in India



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 28.4% of responses received indicated this. Friends/ relatives and magazines/ books are also an important source of information as was revealed by 17.5% and 15.9% of the responses received respectively. Some of them (3.9% of total responses) had visited India before.

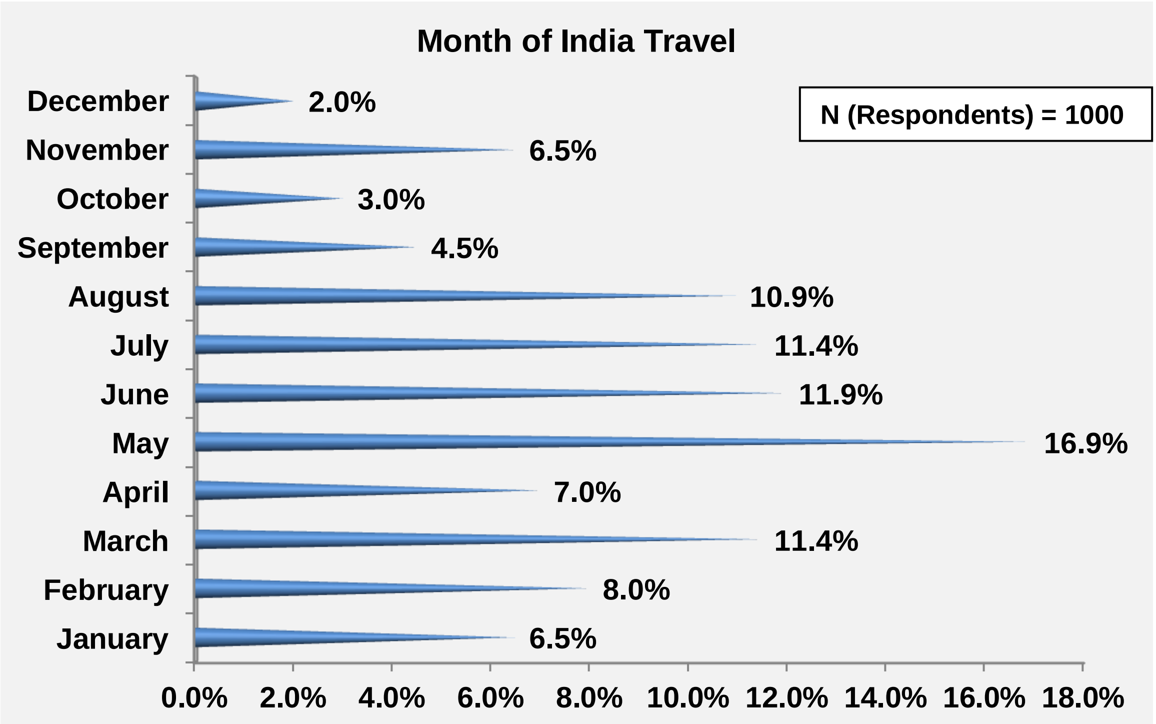
Figure 14: Source of information about India



3.1.3.6 Month of India Travel

1000 past travellers to India mentioned the month during which they visited in India. 16.9% of the total 1000 respondents mentioned May to be their months of visit. June was the month of visit for 11.9% of the total 1000 respondents. December was the months of least visits by Japanese surveyed (2% of total 1000 respondents).

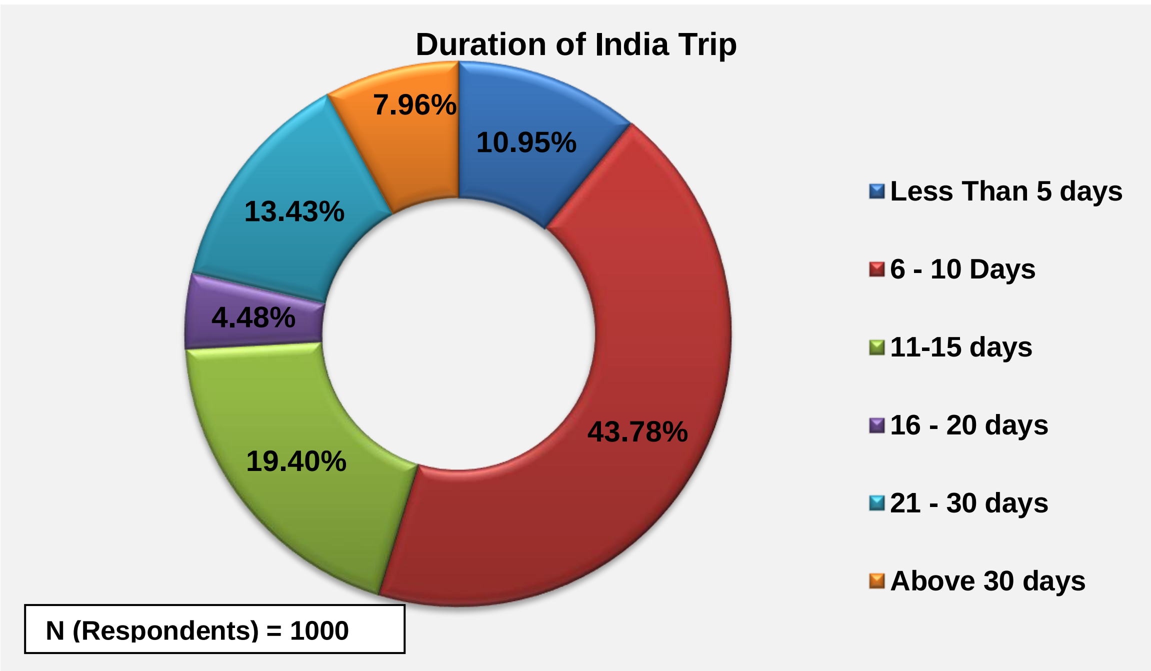
Figure 15: Month of India Travel



3.1.3.7 Duration of India Travel

44% of all 1000 respondents mentioned that their India trip duration was of 6–10 days. While 19% of the total 1000 respondents mentioned that their India trip lasted for 11–15 days. Only 8% of the total 1000 respondents toured India for more than 30 days.

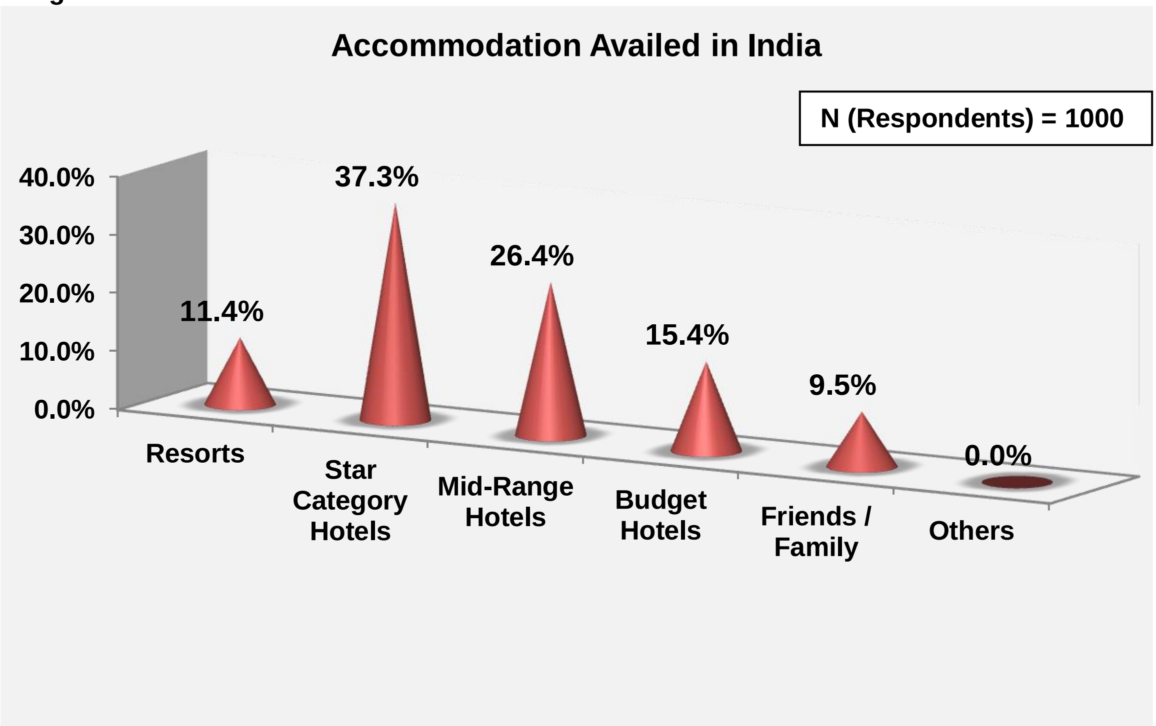
Figure 16: Duration of India travel



3.1.3.8 Accommodation Availed in India

37% of the total 1000 past travellers to India mentioned that they stayed in star hotels in India during their visit. 26% of the total 1000 respondents provided mentioned that they stayed in mid-range hotels during their India trip. Only 9.5% of the total respondents stayed with their friends and relatives during their India trip.

Figure 17: Accommodation Availed in India

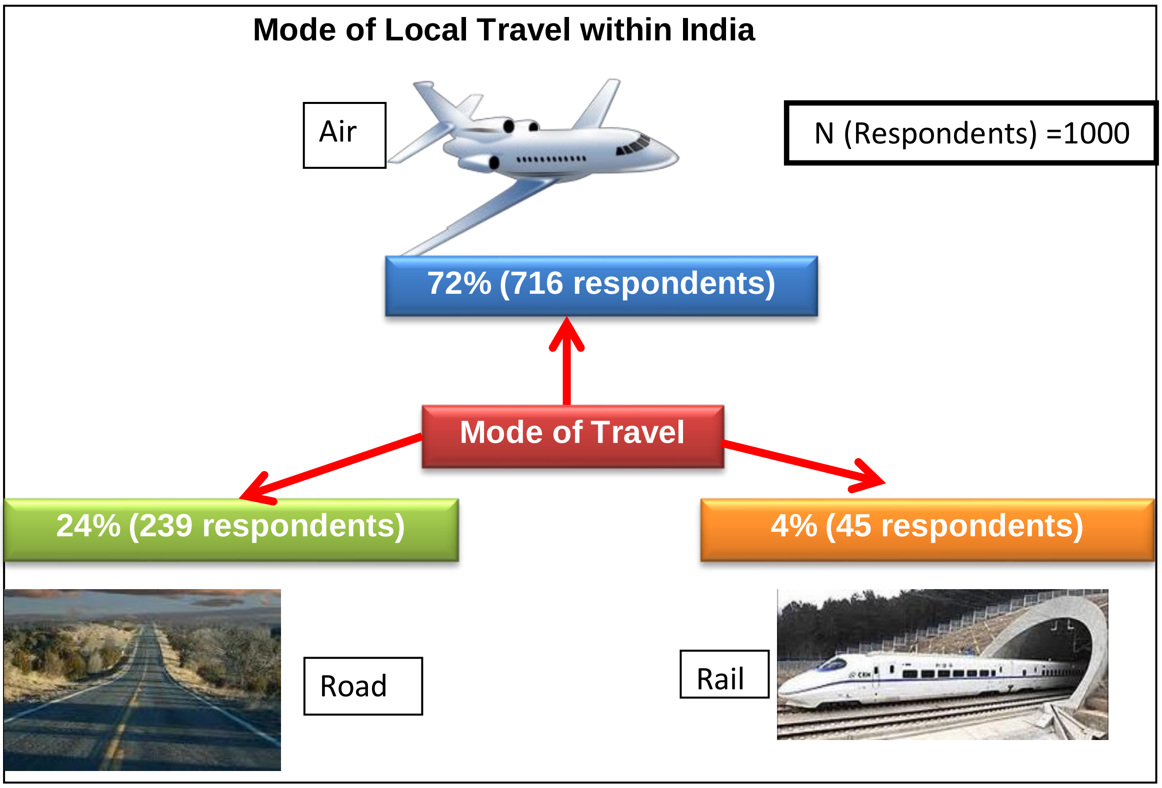


Note: Star category hotels: Hotels with more than 4 stars; Mid-ranged hotels: Hotels of 3 stars rating; Budget hotels: Hotels with 1-2 stars rating

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, 72% people travelled by air alone. Next most favoured mode of travel within India was by road (24% of the total 1000 respondents). Only 4% of the total 1000 respondents preferred to travel by rail within India.

Figure 18: Mode of Local Travel within India

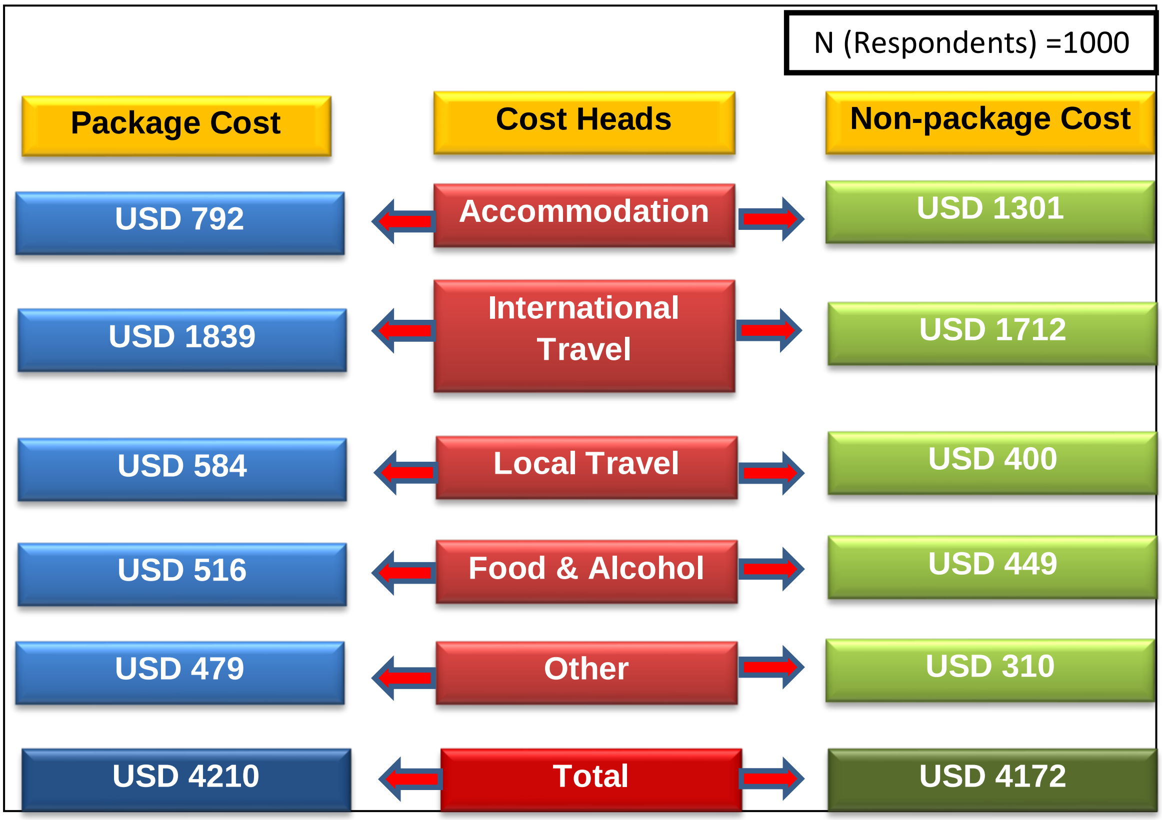


Of the 9 respondents who responded to the query on trains availed of, only 6 claimed to have availed of the luxury trains like Palace on Wheels.

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.

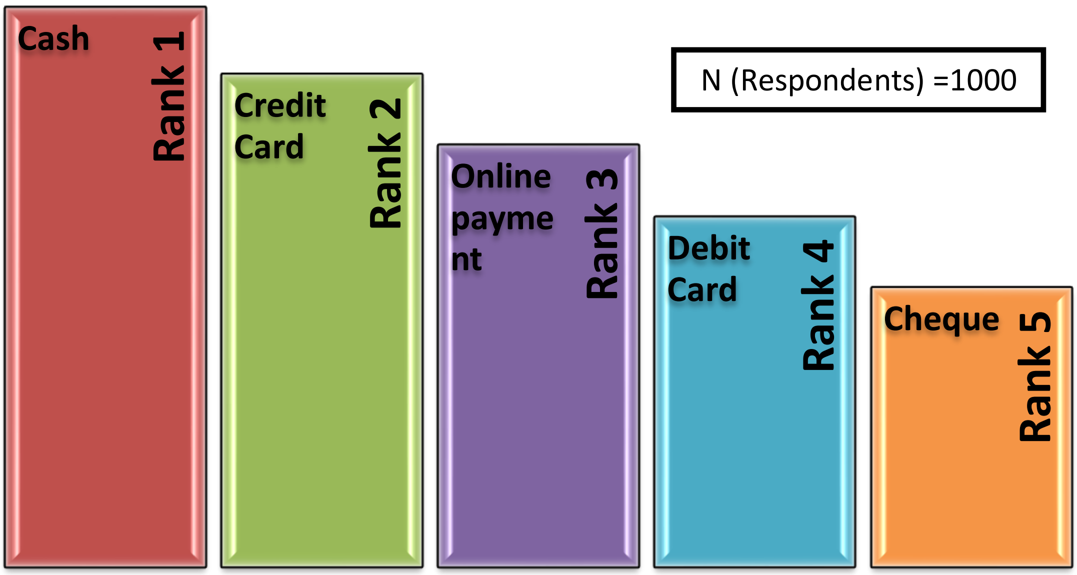
Figure 19: Average per Person Expenses for India Trip



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 Japanese travellers to India are presented below.

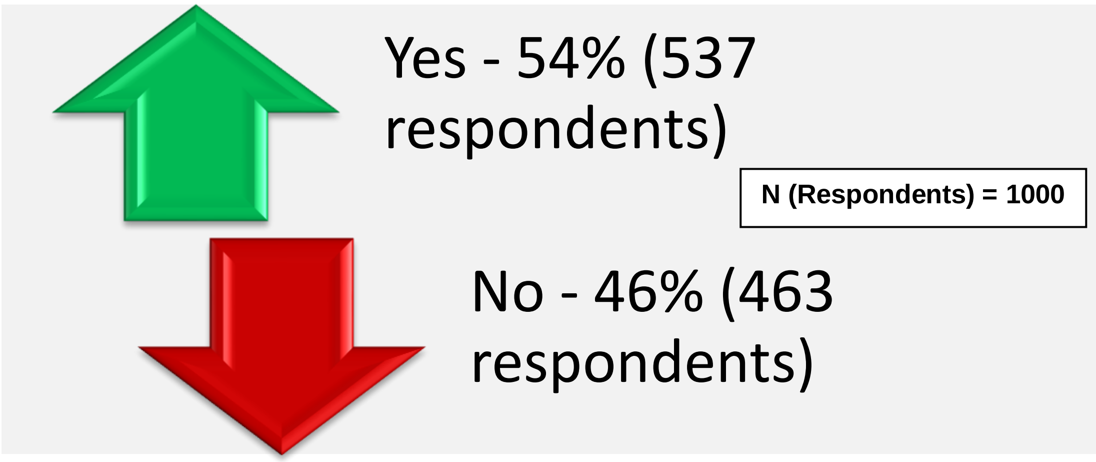
Figure 20: Payment Mode in India



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 Japanese travellers to India are presented below.

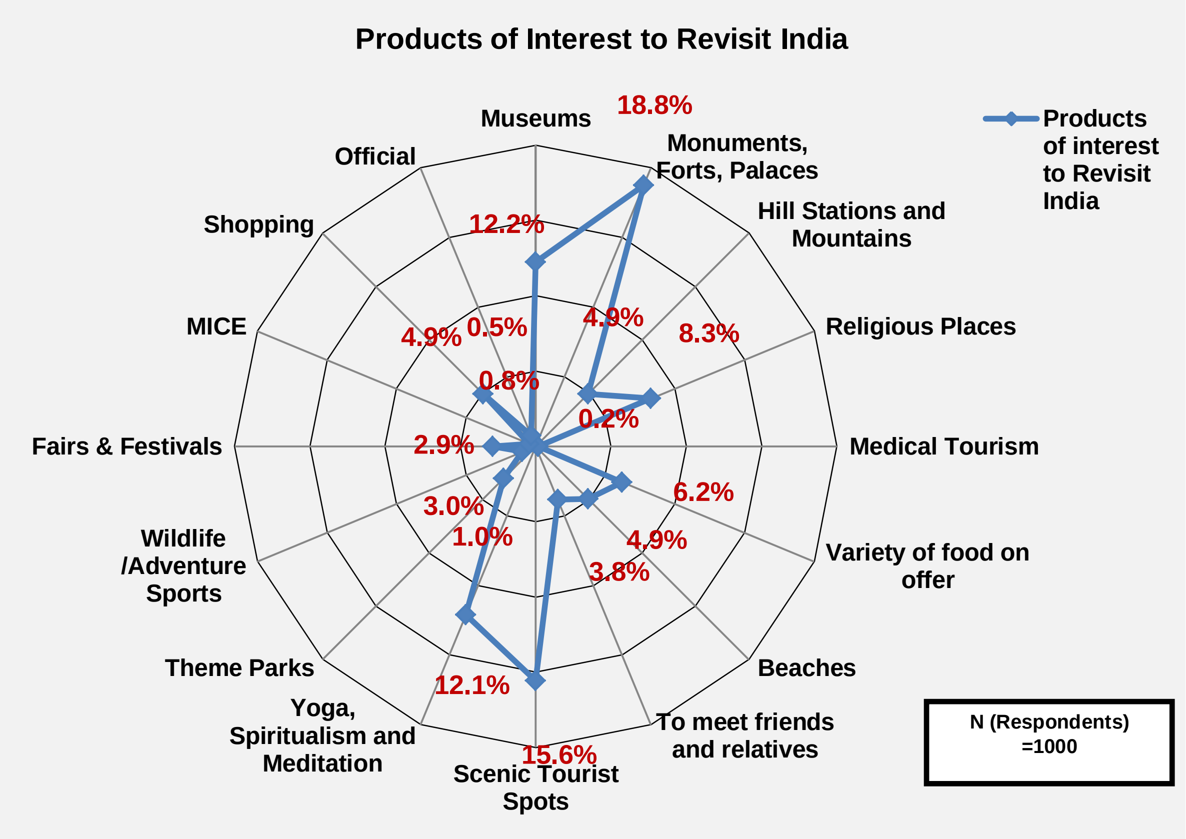
Figure 21: Revisit India



3.1.3.13 Attractions for re-visiting India

Respondents who visited India were asked to indicate attractions that would draw them to India again and they were given the freedom to select multiple options. Of interest to India visitors are its monuments and forts, hill stations, mountains, and scenic tourist places. There are a miniscule number (5 of total responses) who plan to visit India on official purposes and another 3 responses indicating pursuits related to MICE to attract visitors to India.

Figure 22: Attractions for revisiting India



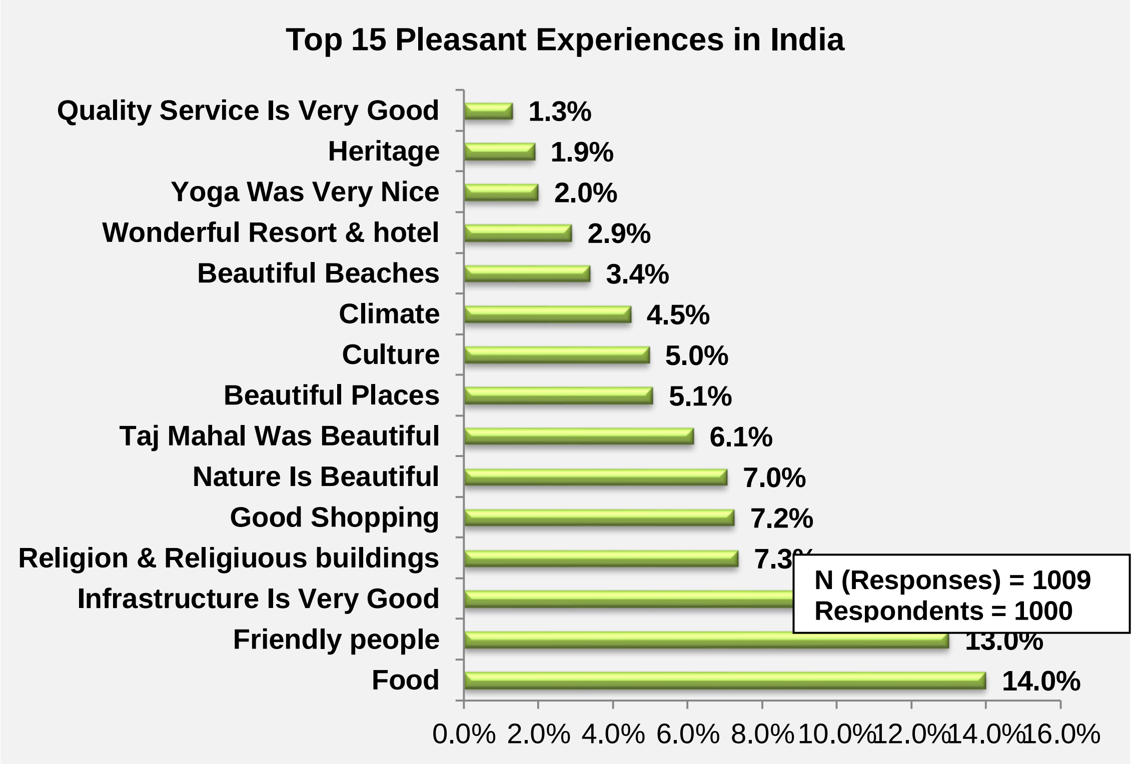
3.1.3.14 Reason for not revisiting India

The 463 persons of 1000 who did express that they would not be revisiting India, cited problems related to high expenses of trip in India as the primary concern. Acquiring a visa and safety/ security issues were also important concerns cited.

3.1.3.15 Best and worst experiences in India

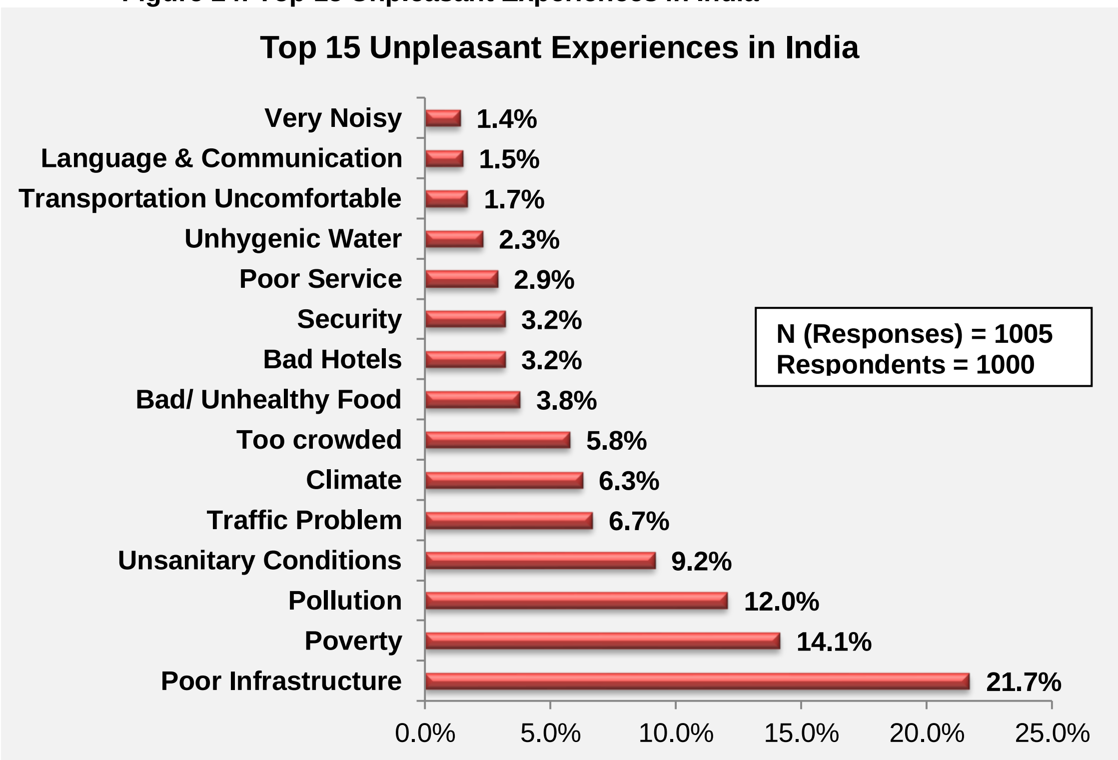
Tourists from Japan, who have visited India, are very impressed by the scenic destinations in India and particularly happy with the food, hospitality warmth and kind-heartedness of the people in India. Those fond of food like India because of the vast cuisine it offers. Respondents who visited India were asked to indicate their best and most enjoyable aspects about coming here and they were given the freedom to select multiple options. The best part of coming to India is cited as variety of food (14% of the responses), friendly people (13% of the responses) and infrastructure (11.5% of the responses).

Figure 23: Top 15 Pleasant Experiences in India



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

Figure 24: Top 15 Unpleasant Experiences in India



3.1.3.16 Satisfaction from visiting India

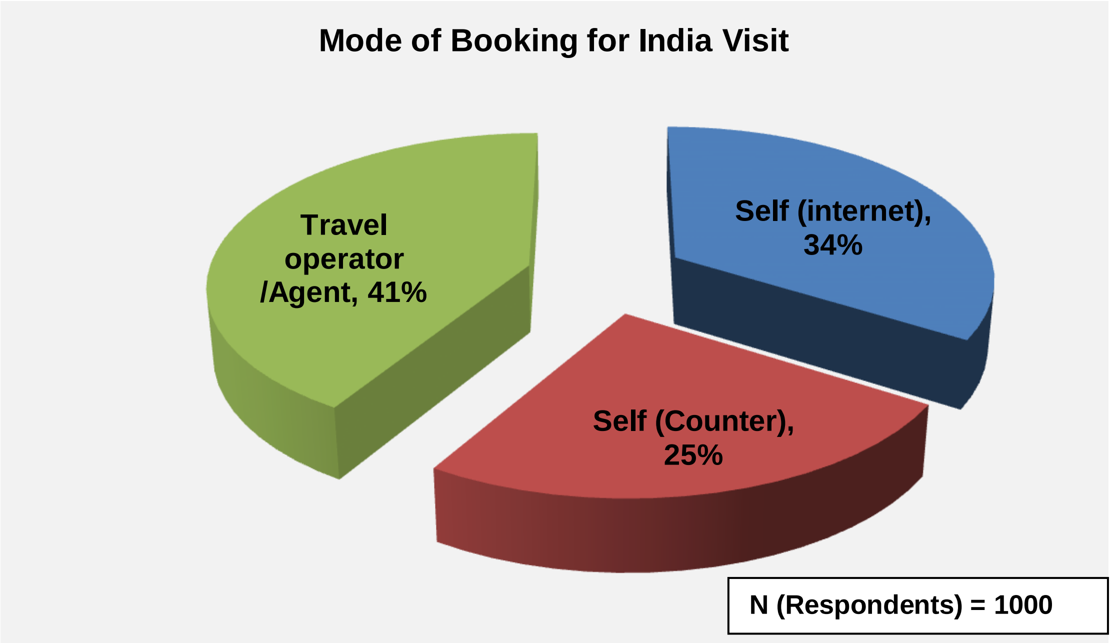
Overall, 46% of the 1000 past travellers to India interviewed in the survey were satisfied with their experience in visiting India and mentioned it was "good". 18% of the respondents rated their India holiday experience as 'Excellent'.

Figure 25: Satisfaction with Visit to India

3.1.3.17 Mode of booking

Around 34% of the respondents booked their tickets online themselves. Another 41% use travel agents while 25% of the total 1000 respondents booked their tickets themselves over the counter.

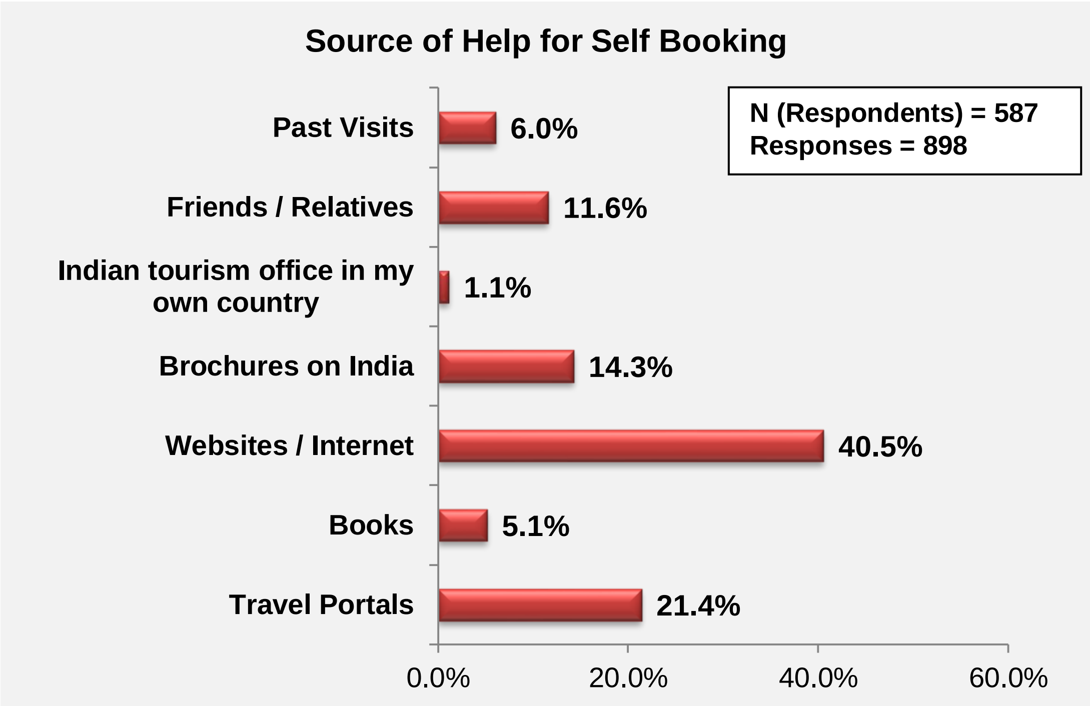
Figure 26: Mode of Booking for India Trip



3.1.3.18 Sources of Help While Self Booking

The 587 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. 40.5% of the responses received from internet and 21.4% 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. 11.6% responses showed that on occasion friends and relatives were also consulted.

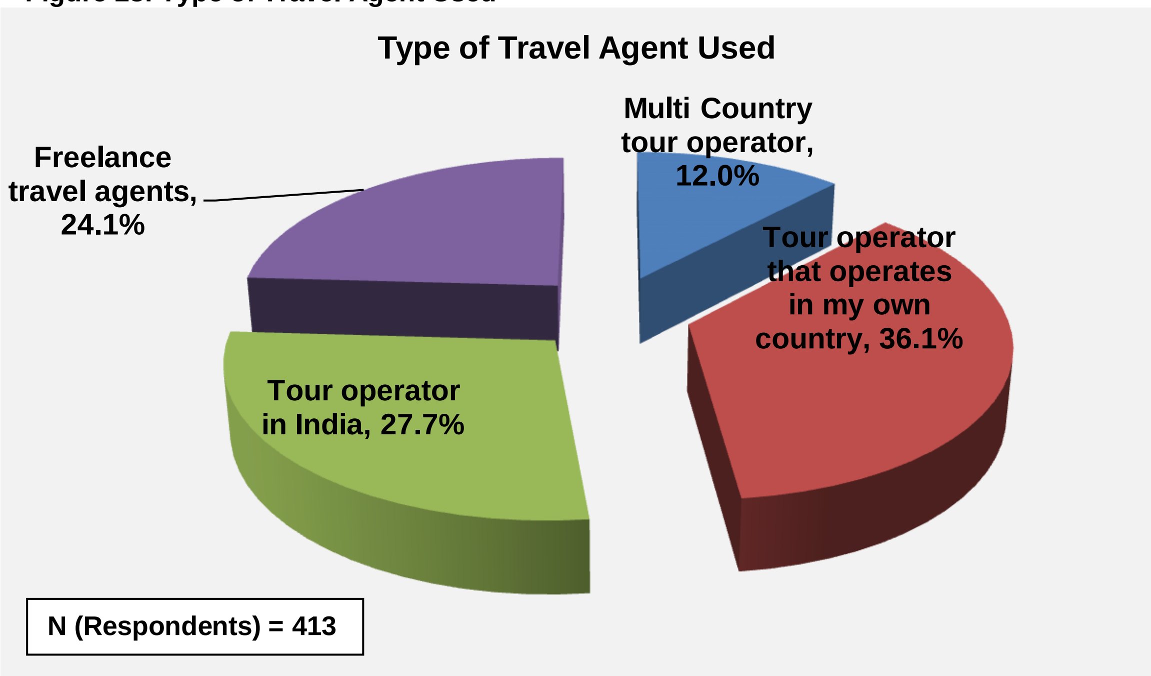
Figure 27: Source of help while self-booking



3.1.3.19 Type of tour operator used

Of the 1000 respondents who travelled to India in the past, 413 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 36% of the cases these are operators from the Japan. In 12% cases multi-country tour operators are also consulted. But consultation with Indian tour operators is higher at 28%.

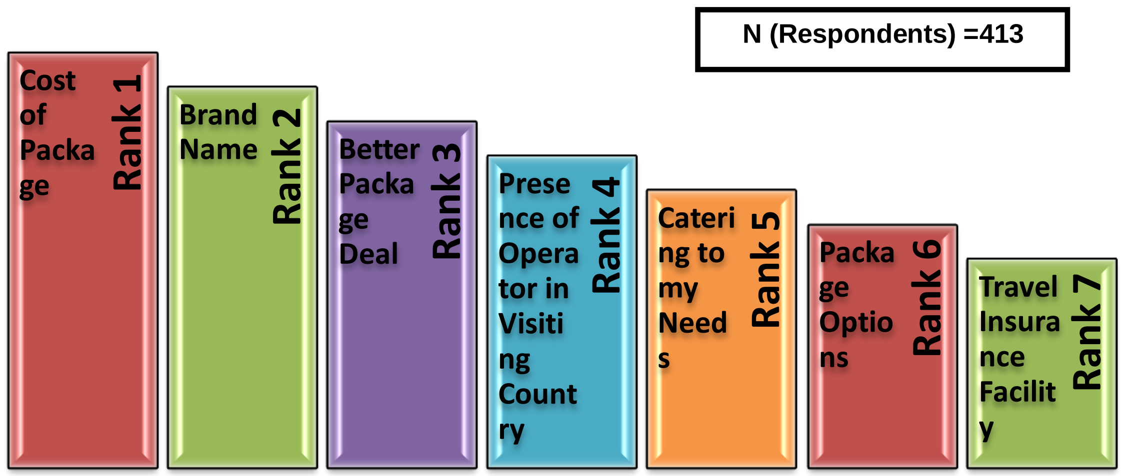
Figure 28: Type of Travel Agent Used



3.1.3.20 Tour operators selection criteria

In the choice of the tour operator, for these 413 respondents, the cost of the package offered were the key deciding factor followed by brand name and better package offered by the tour operator.

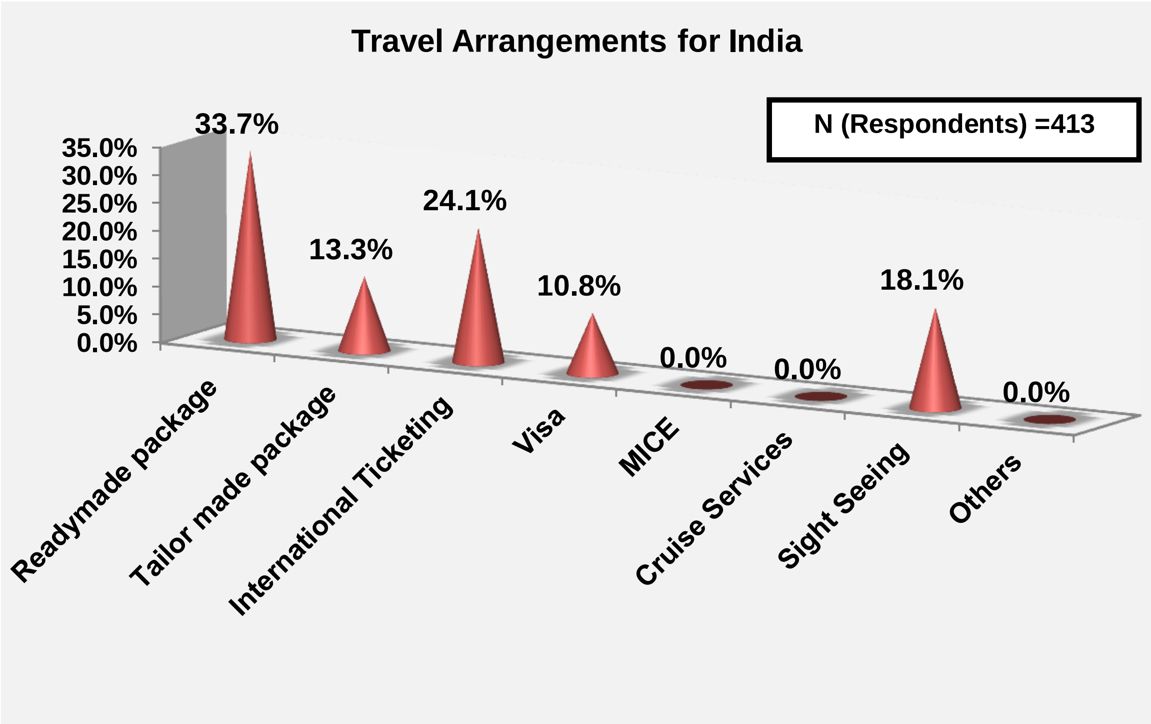
Figure 29: Tour Operators Selection Criteria



3.1.3.21 Travel Arrangements for India

The 413 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 (34% out to total 413 respondents) travellers opted for travel arrangement through tour operators 13% out of the total 413 respondents mentioned that tailor made package was the travel arrangement they chose.

Figure 30: Travel Arrangements for India

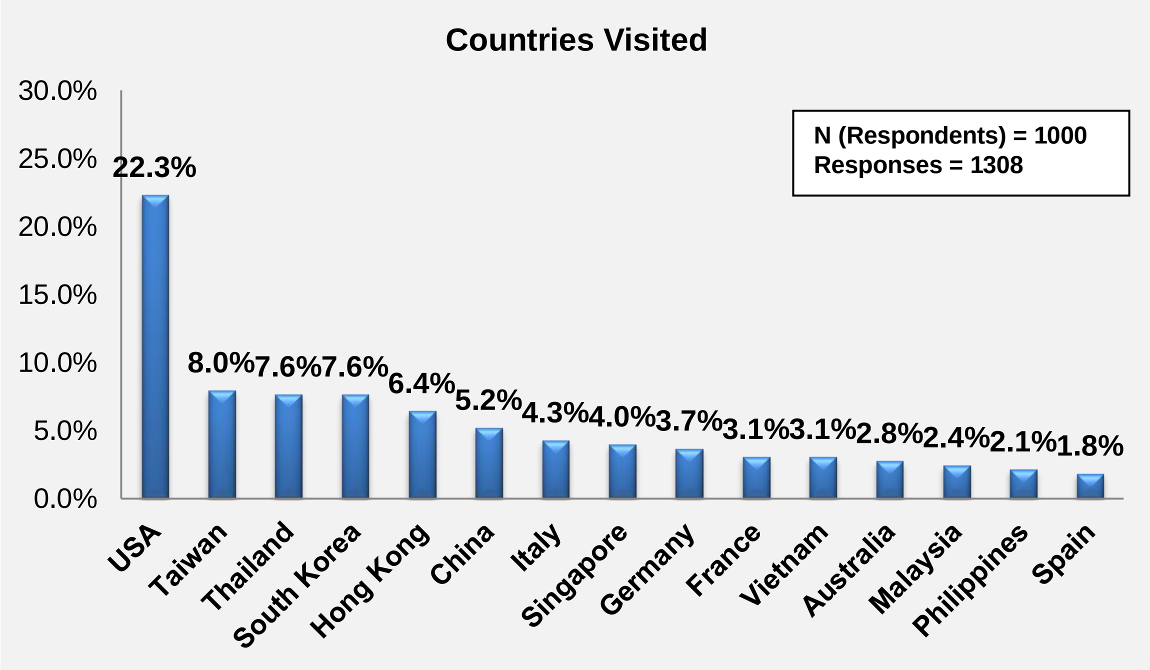

Travel Arrangements for India
N (Respondents) =413
35.0%
30.0%
25.0%
20.0%
15.0%
10.0%
5.0%
0.0%
33.7%
13.3%
24.1%
10.8%
0.0%
0.0%
18.1%
0.0%
Readymade package
Tailor made package
International Ticketing
Visa
MICE
Cruise Services
Sight Seeing
Others

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 Japan in the past one year but not to India, the maximum visits have been made to USA followed by Taiwan, Thailand and South Korea. These top countries constituted 41.59% of all responses.

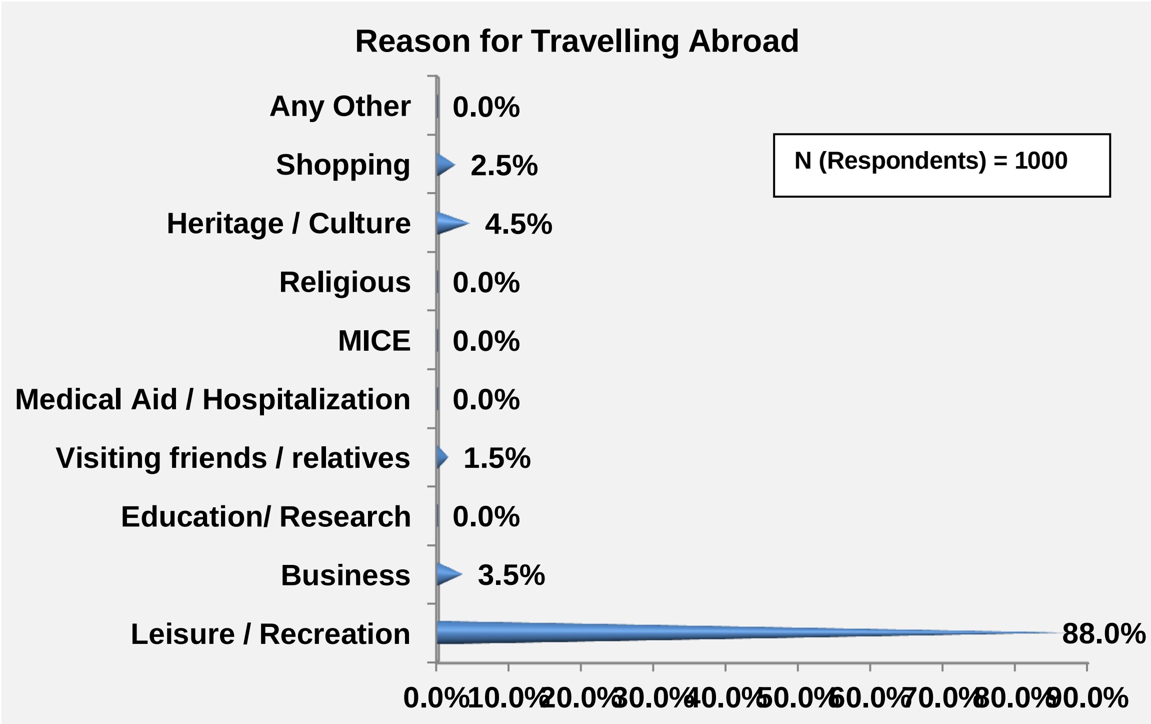
Figure 31: Countries Visited



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 (88% of total 1000 respondents); while some other factors were to visit heritage and culture (4.5% of total 1000 respondents) or business purposes (3.5% of all responses).

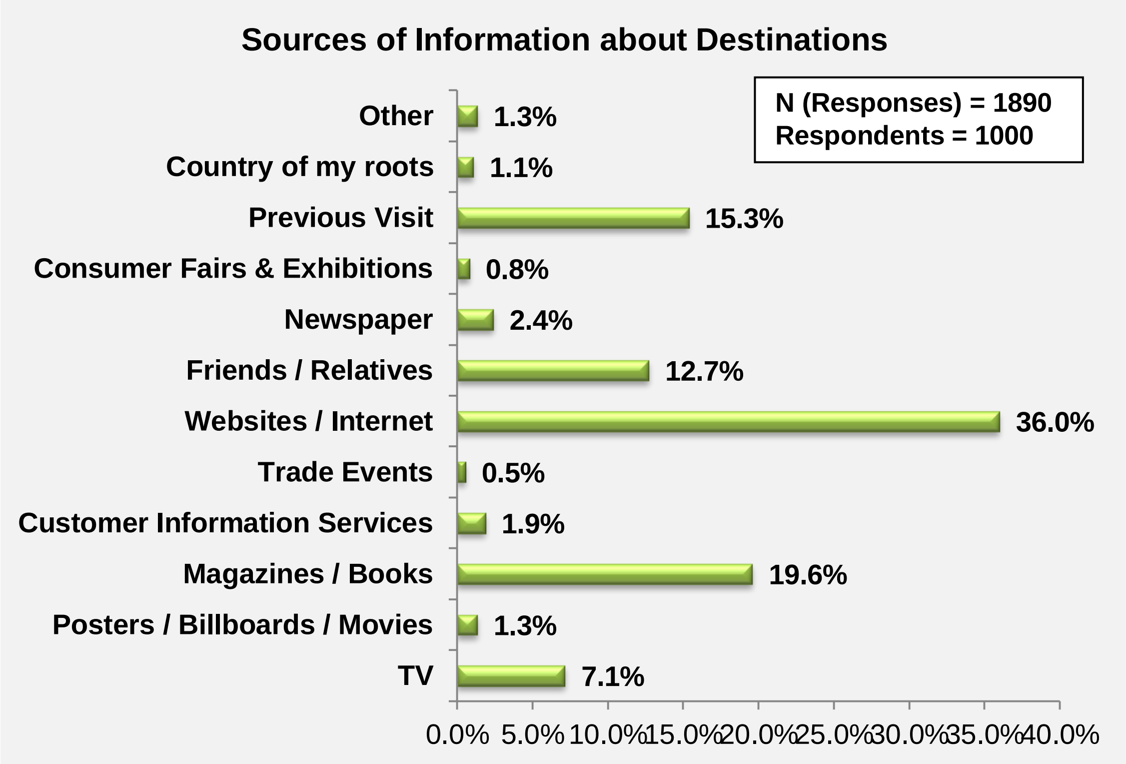
Figure 32: Reason for Travelling Abroad



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 1890 responses. A large number of travellers have found out about the destination countries in most cases from the internet or websites (36% of all responses). In many cases they have also heard from relatives and friends as also because they have been to the country earlier (12.7% of all responses). Magazines and books were also cited as sources of information (19.6% of all responses)

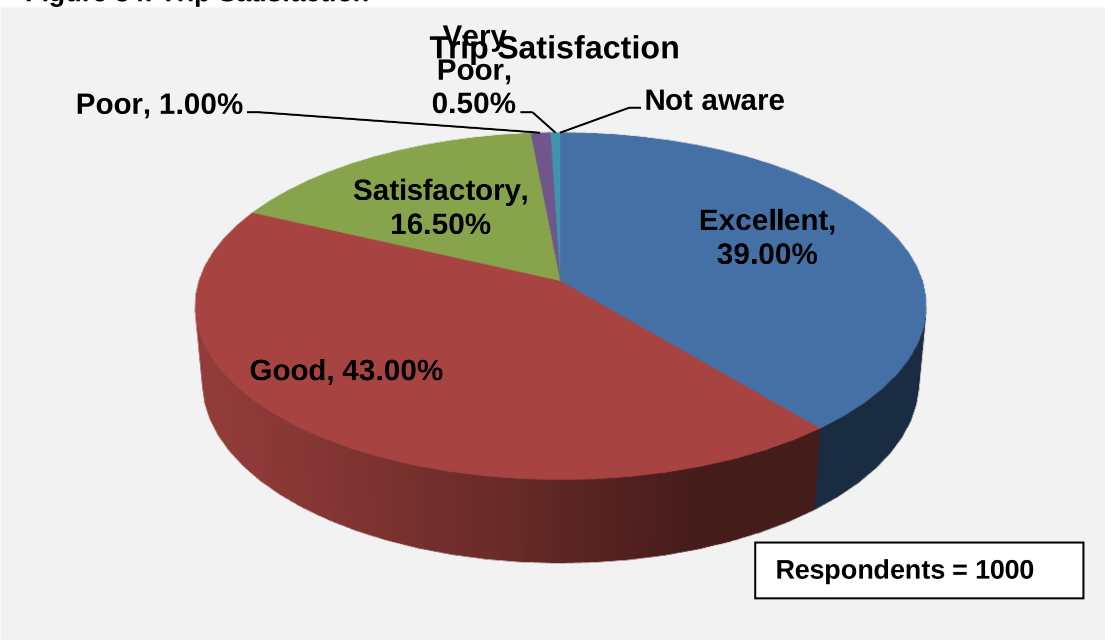
Figure 33: Sources of Information about Destinations Visited



3.1.4.4 Trip Satisfaction

An overwhelming 82% of the respondents believed that their experience had been good to excellent.

Figure 34: Trip Satisfaction



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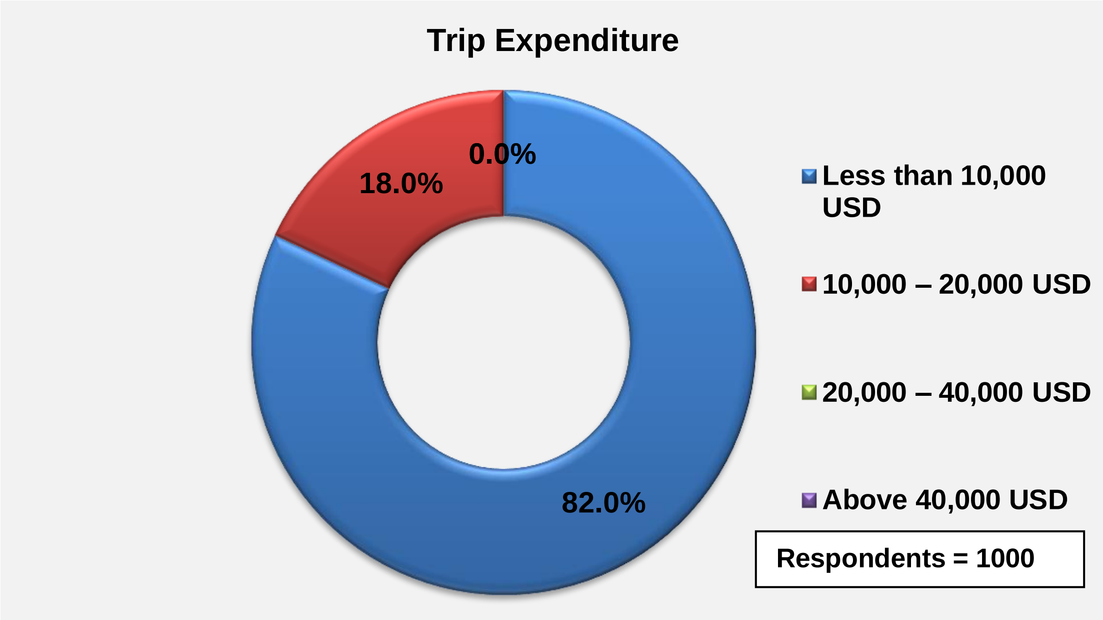
3.1.4.5 Trip Expenditure

An overwhelming 82% of the respondents spent less than USD 10,000 for their entire trip in total.

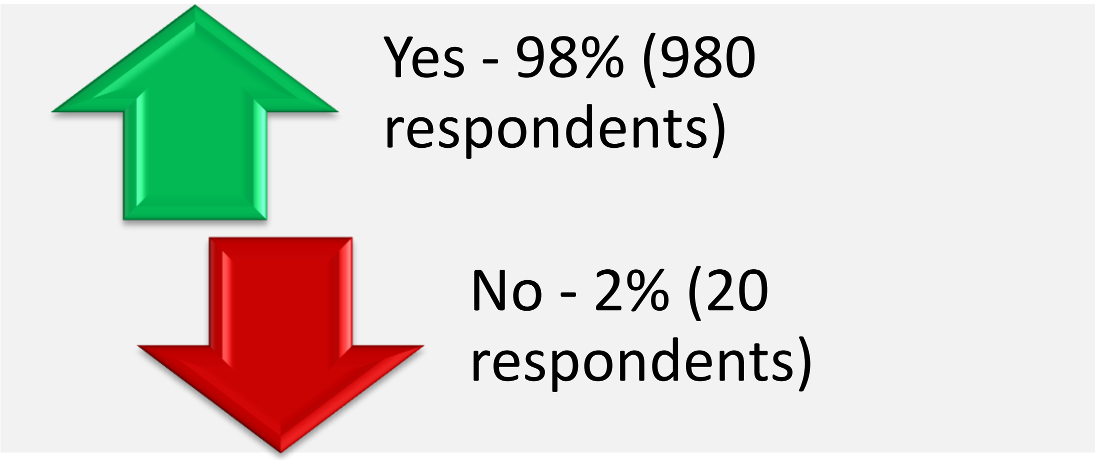
Figure 35: Trip Expenditure



3.1.4.6 Value for money destinations visited

An overwhelming 98% of the respondents out of the total 1000 respondents believed that their experience had been worth the money they spent.

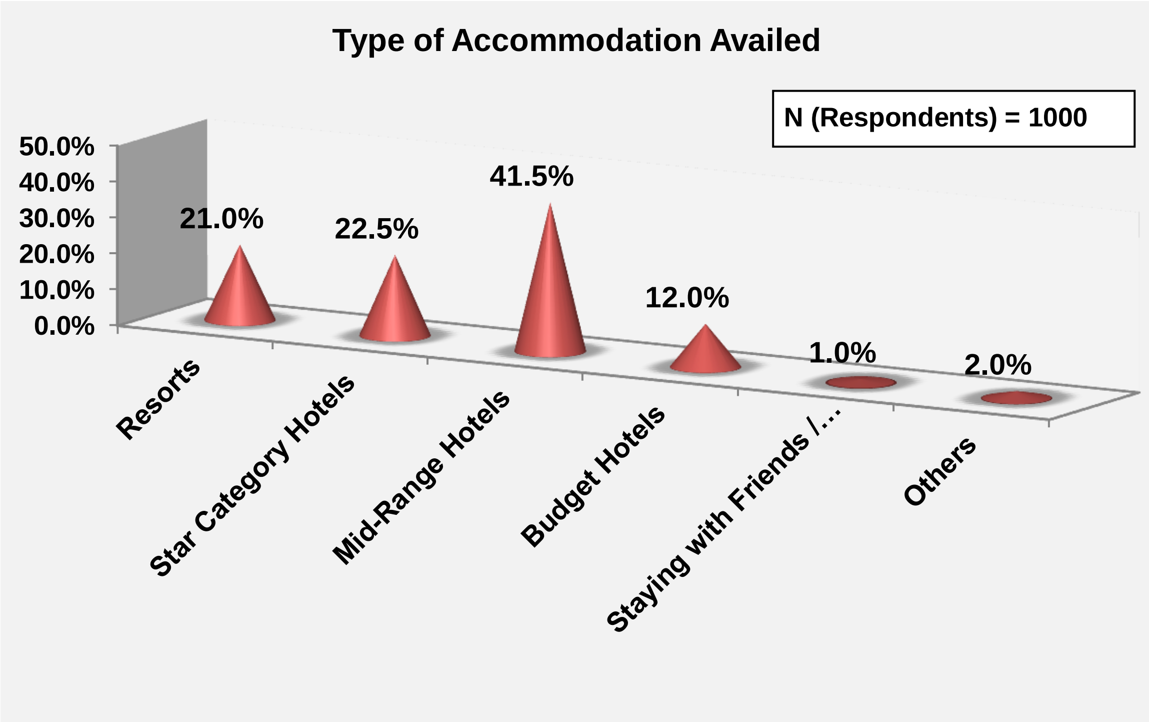
Figure 36: Value for Money Destination



3.1.4.7 Type of accommodation used

About 41.5% of all 1000 respondents who travelled to countries other than India stayed in mid-range hotels during their visit. 12% stayed in budget hotels while about 1% stayed with friends and relatives. 22.5% of the 1000 respondents spent on star category hotels.

Figure 37: 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 38: Package and Non-package Expenses

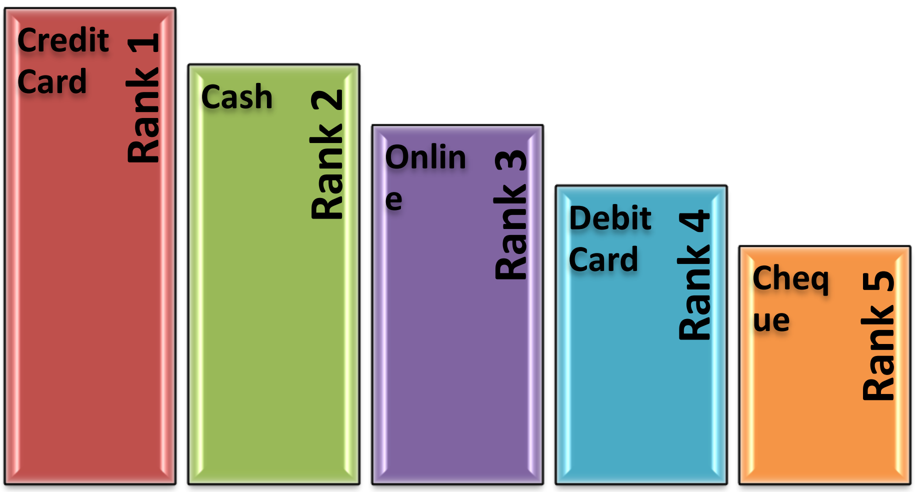
N (Respondents) =1000

Package Cost	Cost Heads	Non-package Cost
USD 1362	Accommodation	USD 1428
USD 2180	International Travel	USD 2204
USD 746	Local Travel	USD 780
USD 702	Food & Alcohol	USD 636
USD 449	Other	USD 470
USD 5439	Total	USD 5518

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 credit card.

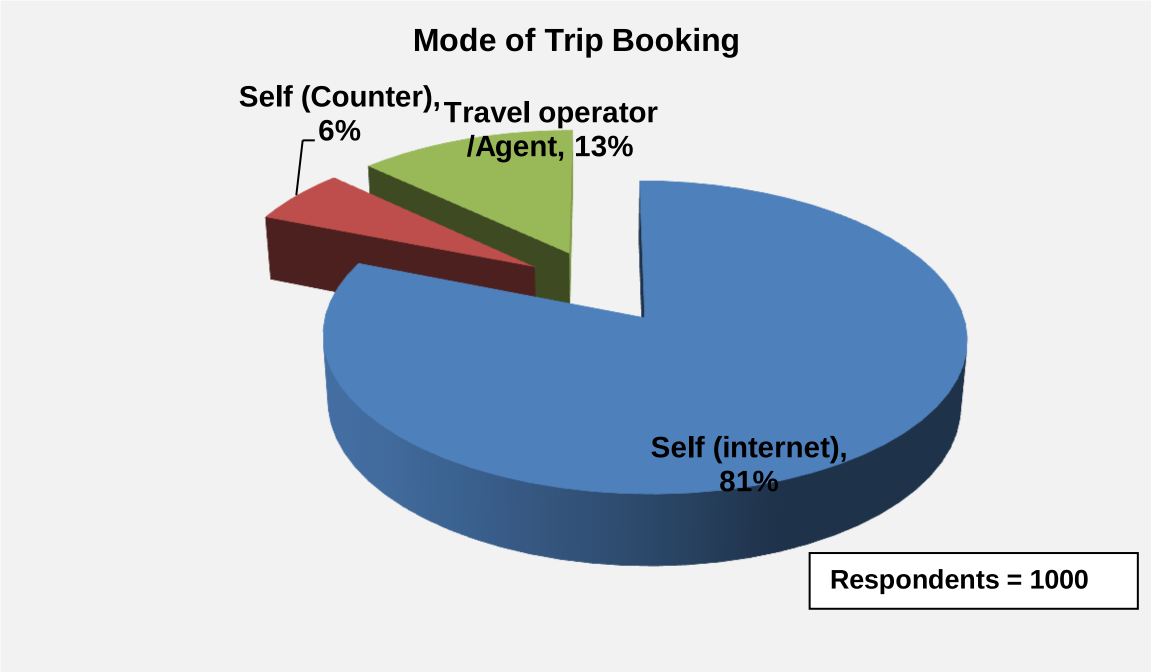
Figure 39: Mode of Payment



3.1.4.10 Mode of Trip Booking

About 87% of all 1000 respondents who travelled to countries other than India booked their trips themselves.

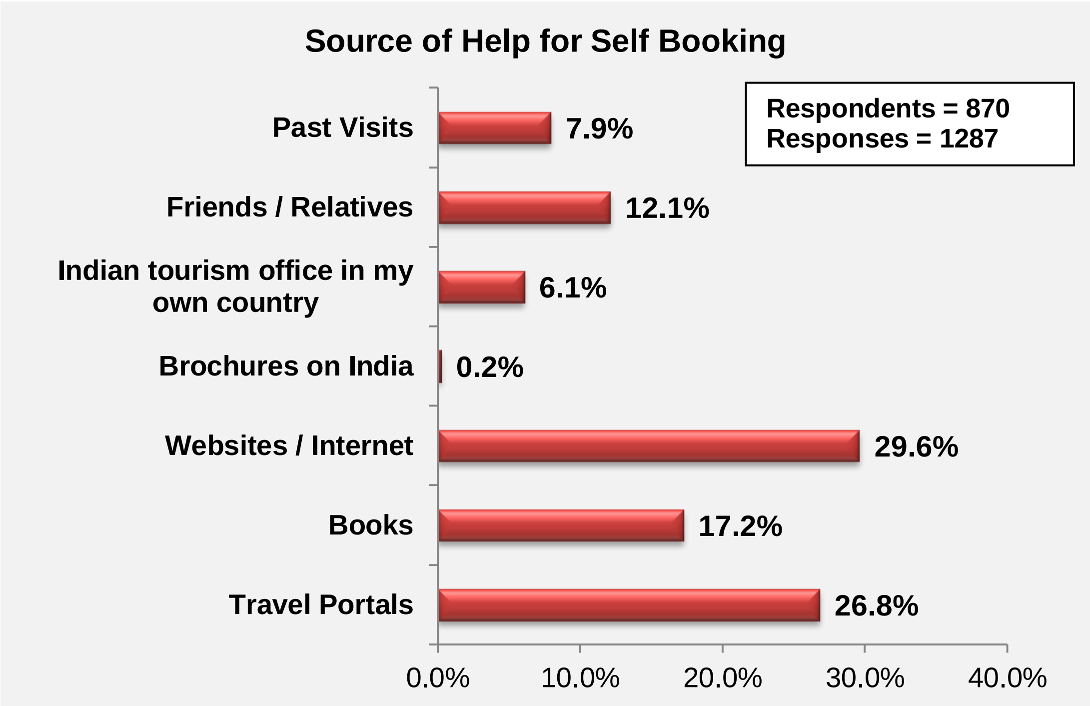
Figure 40: Mode of Trip Booking



3.1.4.11 Help While Self Booking for Trip

The 870 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.1287 responses were received from the 870 respondents and 30% of responses indicated that the major source of help was websites/ internet.

Figure 41: Source of Help for Self Booking



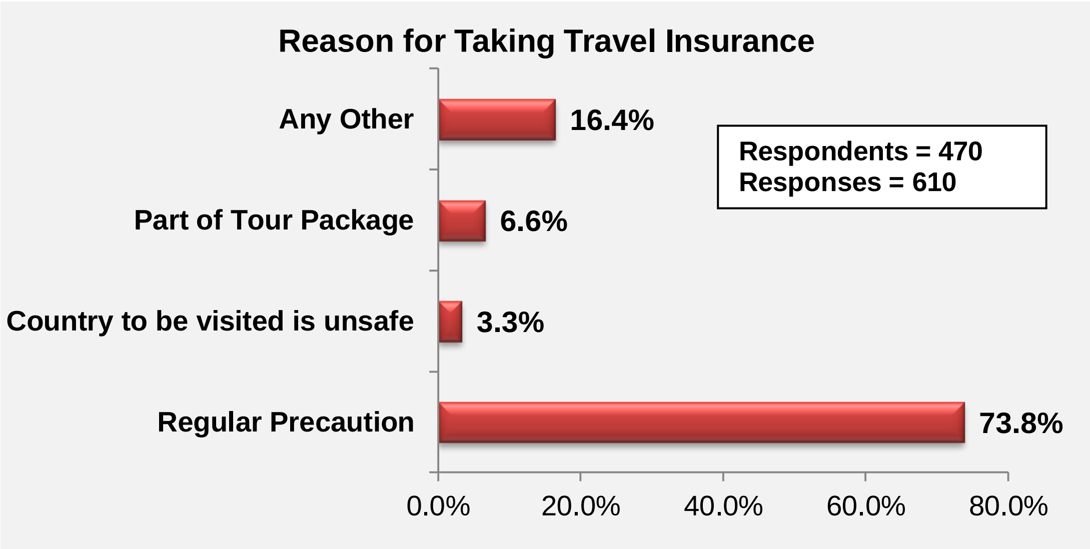
3.1.4.12 Travel Insurance Availed

About 47% of total 1000 respondents who travelled to countries other than India availed travel insurance for their trip.470 respondents opted for travel insurance while 530 respondents (53% of 1000 respondents) did not opt for travel insurance.

3.1.4.13 Reason for Taking Travel Insurance

About 74% of 470 respondents who availed travel insurance mentioned that they took it just for regular precaution.

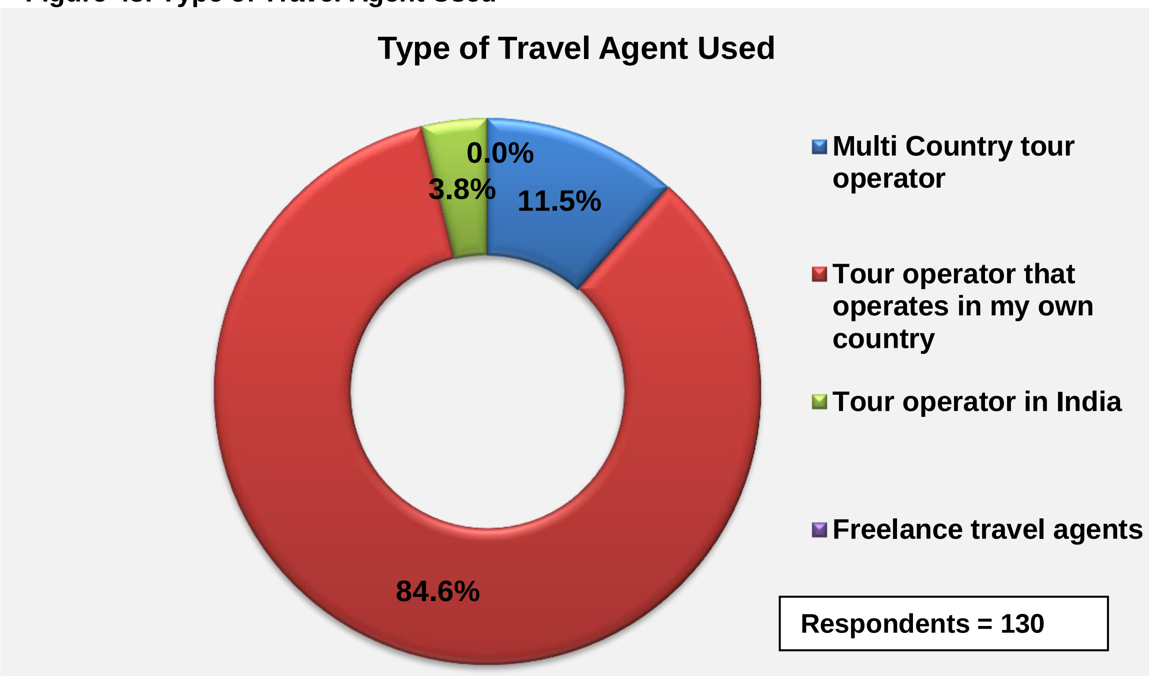
Figure 42: Reason for Taking Travel Insurance



3.1.4.14 Type of Travel Agent Used

About 85% of the total of 130 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.

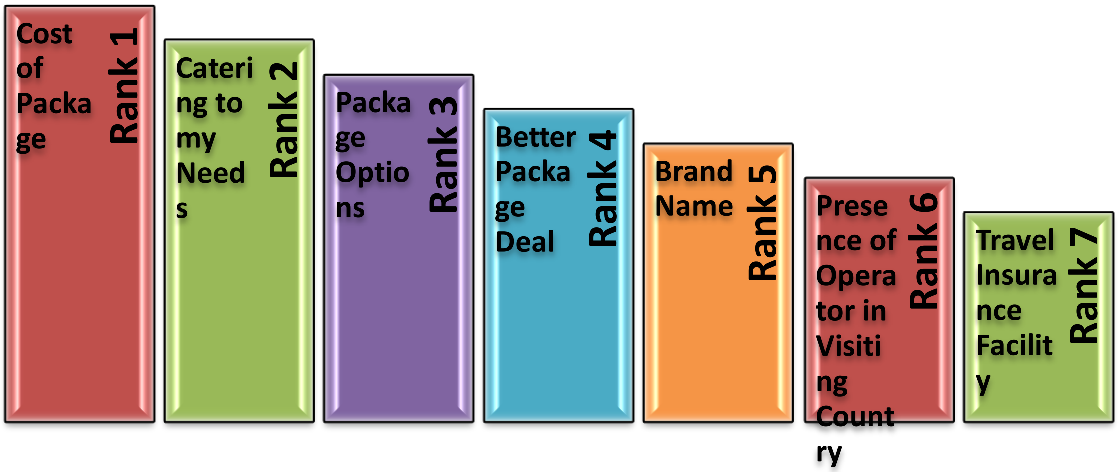
Figure 43: Type of Travel Agent Used



3.1.4.15 Selection Criteria of Tour Operators

The 130 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.

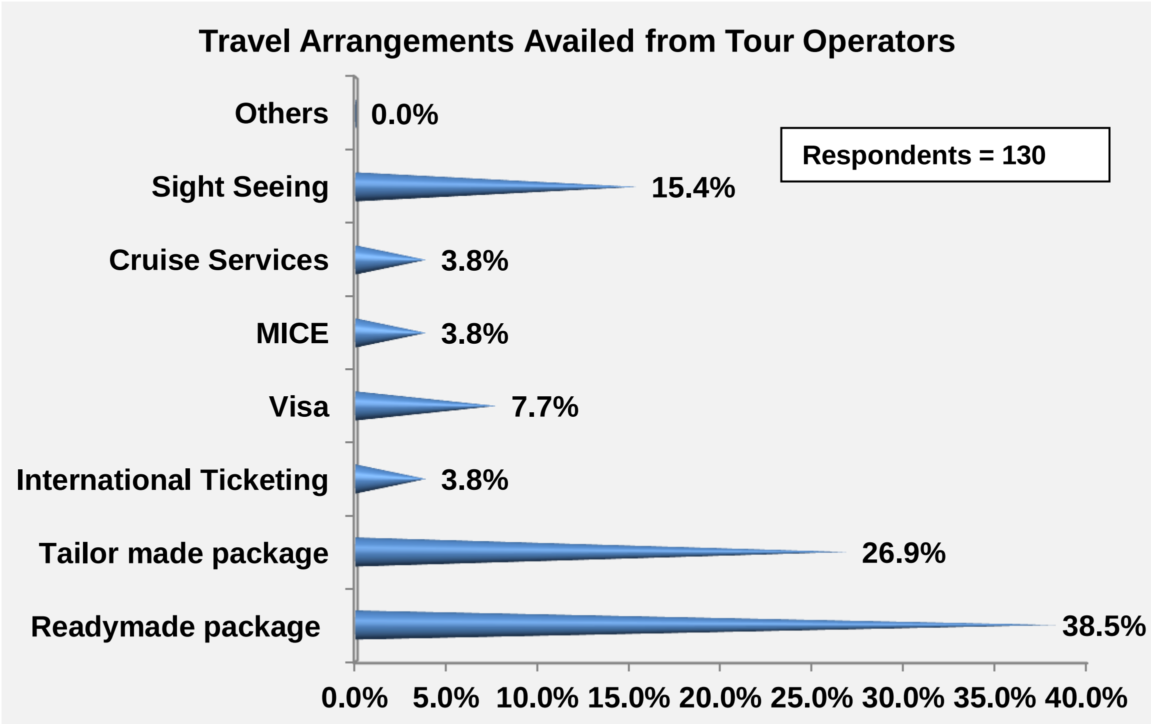
Figure 44: Selection Criteria of Tour Operators



3.1.4.16 Travel Arrangements Availed from Tour Operators

The 130 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. 38.5% of the total of 130 respondents mentioned that a readymade package was the arrangements availed from the tour operator.

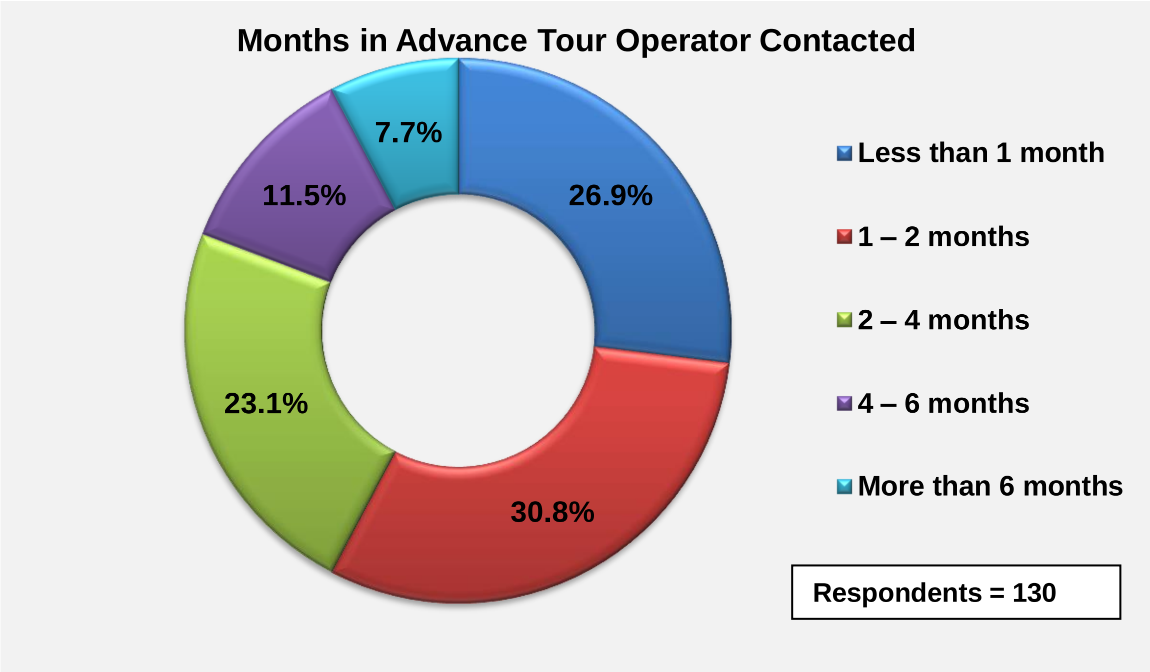
Figure 45: Travel Arrangements Availed from Tour Operators



3.1.4.17 Months before Contacted Tour Operator

The 130 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. 31% of the total of 130 respondents mentioned that they contacted the tour operator around 1 to 2 months in advance.

Figure 46: Months in Advance Tour Operators Contacted



3.1.4.18 Awareness of India as a tourist destination

About 7% of all 1000 respondents who had visited other countries in the last one year were aware of India as a tourist destination.

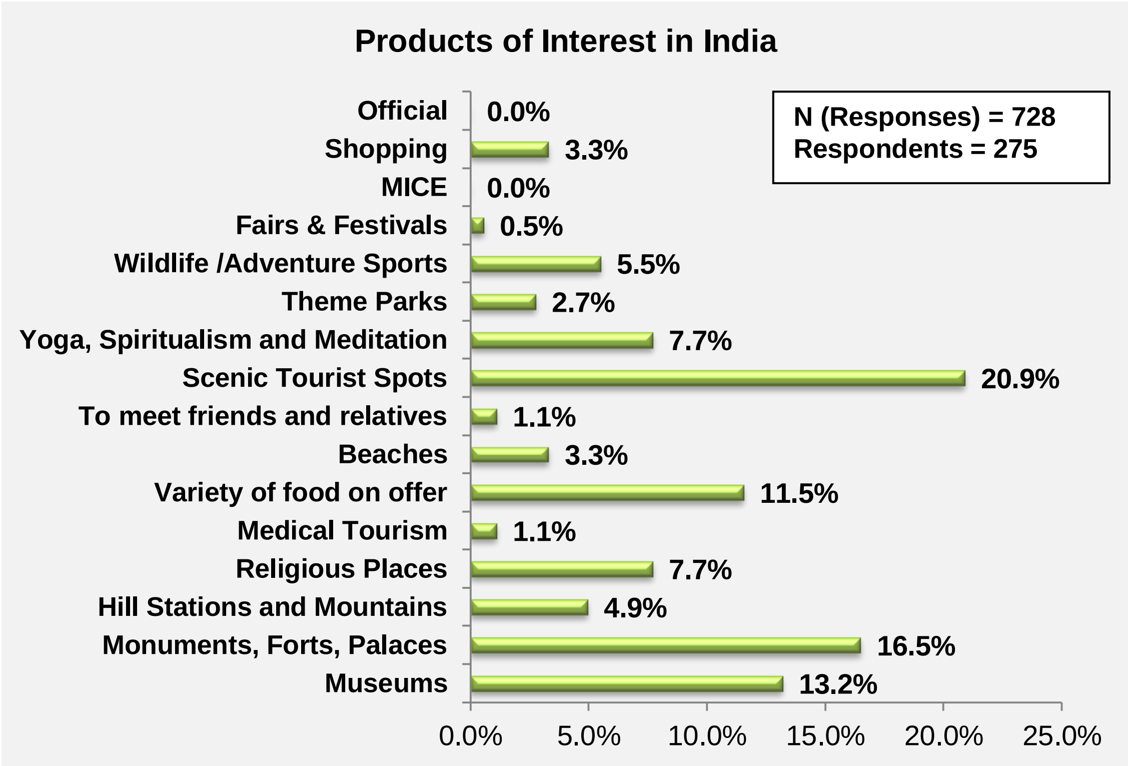
3.1.4.19 Intention of visiting India

Though 7% of the respondents (70 respondents) were aware of India as a tourist destination, only about 27.5% 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 275 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). 728 responses were received from 275 respondents in response to this question. Most respondents admitted that they found India attractive for its scenic tourist spots (21% of 728 responses).

Figure 47: Products of Interest in India

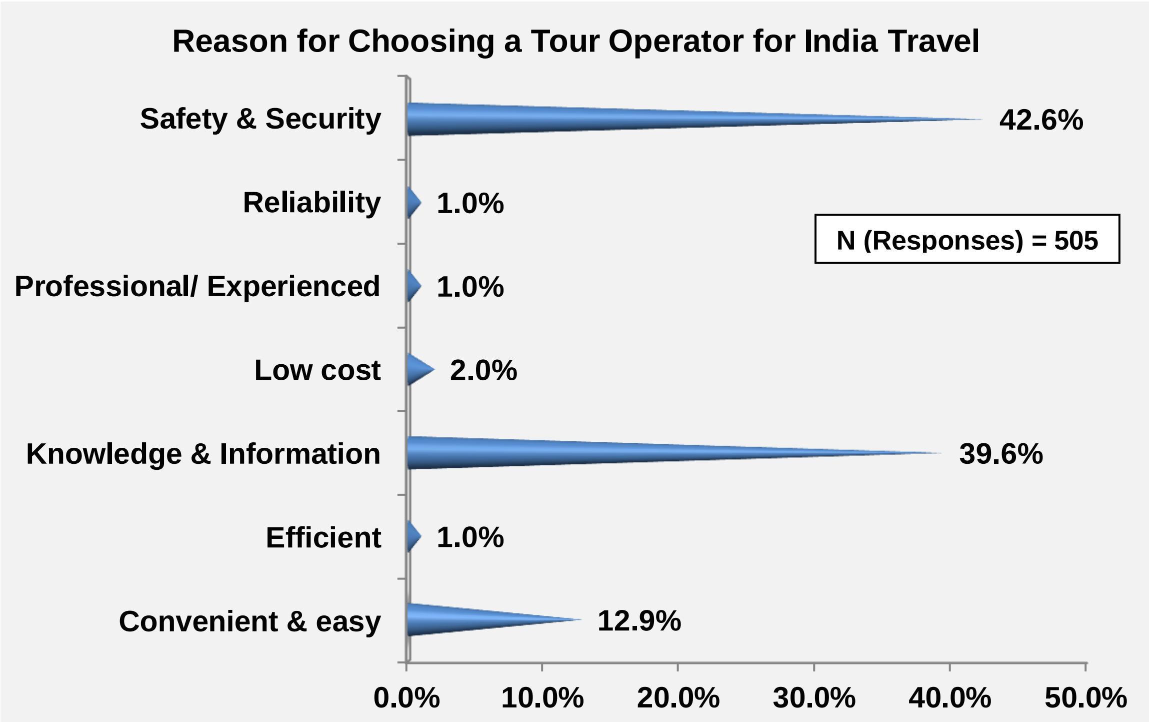


3.1.4.21 Intention and reason for choosing an intermediary for India travel

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. 50.5% of the respondents showed inclination to consult a tour operator and 49.5% 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. 43% of responses showed that the travellers would like to approach tour operators for the safety and security they offer. About 40% of the responses were in favour of the knowledge and information that a tour operator would provide.

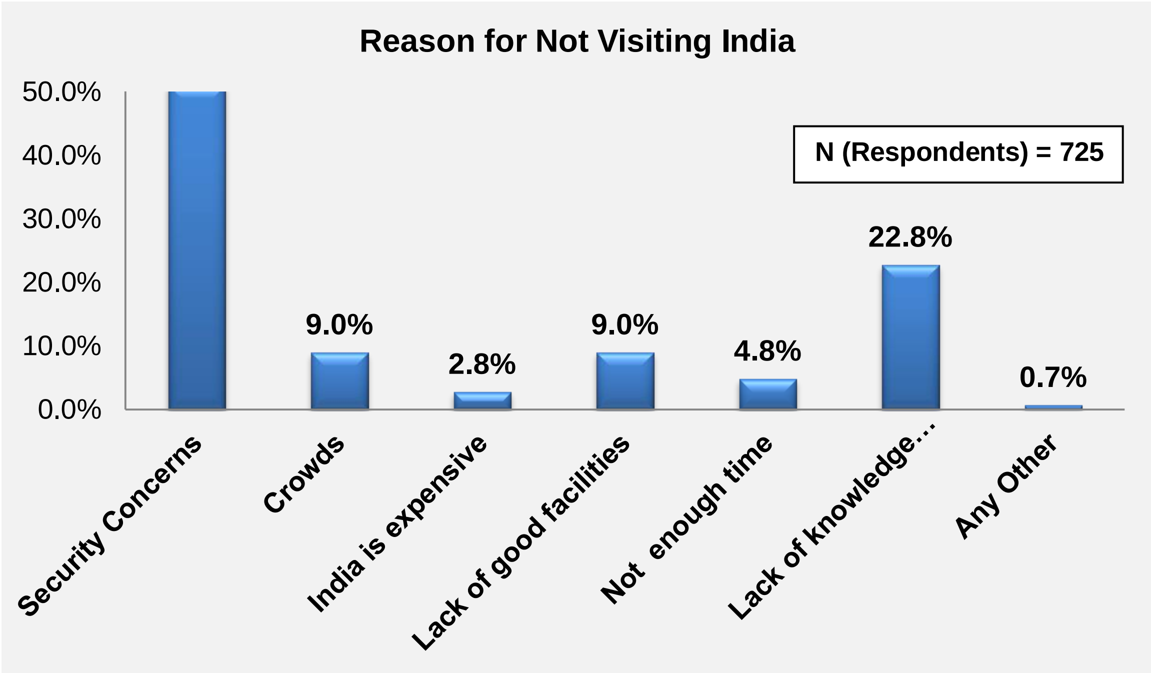
Figure 48: Reason for Approaching Tour Operators



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 (725 of 1000 respondents), the primary concern that proved a dampener was security concern in India (51% of the 1000 respondents received in this context). Some also felt that India was expensive and has lack of facilities (2.8% of responses each).

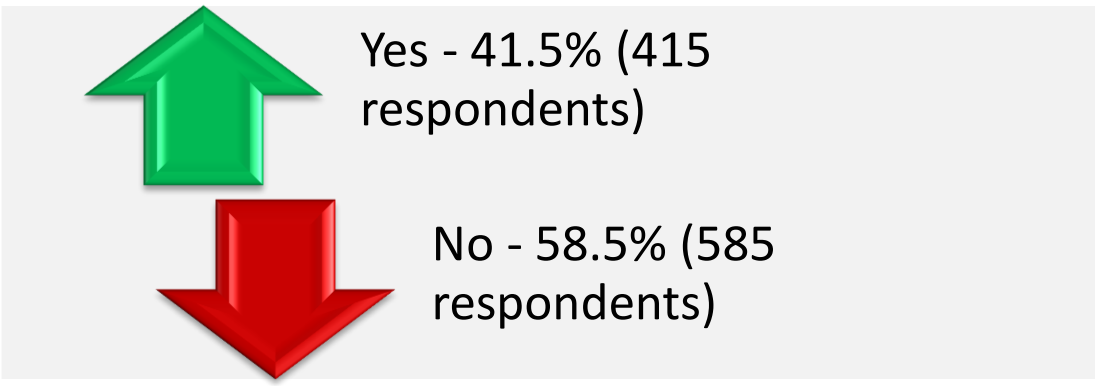
Figure 49: Reasons for Not Visiting India in Future



3.1.4.23 Visit India Ever

All 1000 past travellers from Japan to countries other than India were asked if they would ever visit India and 41.5% of the 1000 respondents stated that they would visit India. 58.5% respondents out of 1000 past travellers to other countries responded in the negative on ever travelling to India.

Figure 50: 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 (11%) stayed in resorts whereas travellers who headed to other countries, 21% stayed in resorts.

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

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
11.4%	Resorts	21.0%
37.3%	Star Category Hotels	22.5%
26.4%	Mid-Range Hotels	41.5%
15.4%	Budget Hotels	12.0%
9.5%	Staying with Friends / Family	1.0%
0.0%	Others	2.0%

3.1.5.2 Package Expenses of Past Travellers

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

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

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
792	Accommodation	1362
1839	International Travel	2180
584	Local Travel	746
516	Food including alcohol	702
479	Others	449
4210	Total	5439

3.1.5.3 Non-Package Expenses of Past Travellers

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

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

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
1301	Accommodation	1428
1712	International Travel	2204
400	Local Travel	780
449	Food including alcohol	636
310	Others	470
4172	Total	5518

3.1.5.4 Preferred Mode of Payment of Past Travellers

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

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

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
1	Cash	2
5	Cheque	5
3	Online	3
2	Credit Card	1
4	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 followed by excellent.

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

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
17.9%	Excellent	39.0%
45.8%	Good	43.0%
32.3%	Satisfactory	16.5%
4.0%	Poor	1.0%
0.0%	Very Poor	0.5%

3.1.5.6 Mode of Trip Booking of Past Travellers

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

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

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
33.8%	Self (Internet)	81.0%
24.9%	Self (Counter)	6.0%
41.3%	Travel Operator /Agent	13.0%

3.1.5.7 Source of Booking Information for Past Travellers

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

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

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
21.4%	Travel Portals	26.8%
5.1%	Books	17.2%
40.5%	Websites / Internet	29.6%
14.3%	Brochures on Country	0.2%
1.1%	Country Tourism office in my own country	6.1%
11.6%	Friends / Relatives	12.1%
6.0%	Past Visits	7.9%

3.1.5.8 Type of Travel Agent Used by Past Travellers

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

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

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
12.0%	Multi Country tour operator	11.5%
36.1%	Tour operator that operates in my own country	84.6%

27.7%	Tour operator in India	3.8%
24.1%	Freelance travel agents	0.0%

3.1.5.9 Type of Travel Arrangements Used by Past Travellers

Among past travellers who headed to India, a large percentage (24%) sought international ticketing arrangements from tour operators whereas travellers who headed to other countries, only 3.8% of them sought international ticketing as travel arrangements from tour operators.

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

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
33.7%	Readymade package	38.5%
13.3%	Tailor made package	26.9%
24.1%	International Ticketing	3.8%
10.8%	Visa	7.7%
0.0%	MICE (Meeting, Incentives, Conventions, Exhibitions)	3.8%
0.0%	Cruise Services	3.8%
18.1%	Sight Seeing	15.4%
0.0%	Others	0.0%

Chapter Four

Prospective Outbound Travellers – Survey Findings

4.1 Prospective Outbound Travel Behavior

4.1.1 Profiling Information

4.1.1.1 Place of residence

The survey investigated 1000 respondents (persons who are intending to travel abroad) from Japan of which 57% of the travellers were from Tokyo and 43% from Osaka.

Figure 51: Distribution of Past Travellers by Place of Residence

Map Source: www.japanmap.facts.co

4.1.1.2 Gender Distribution

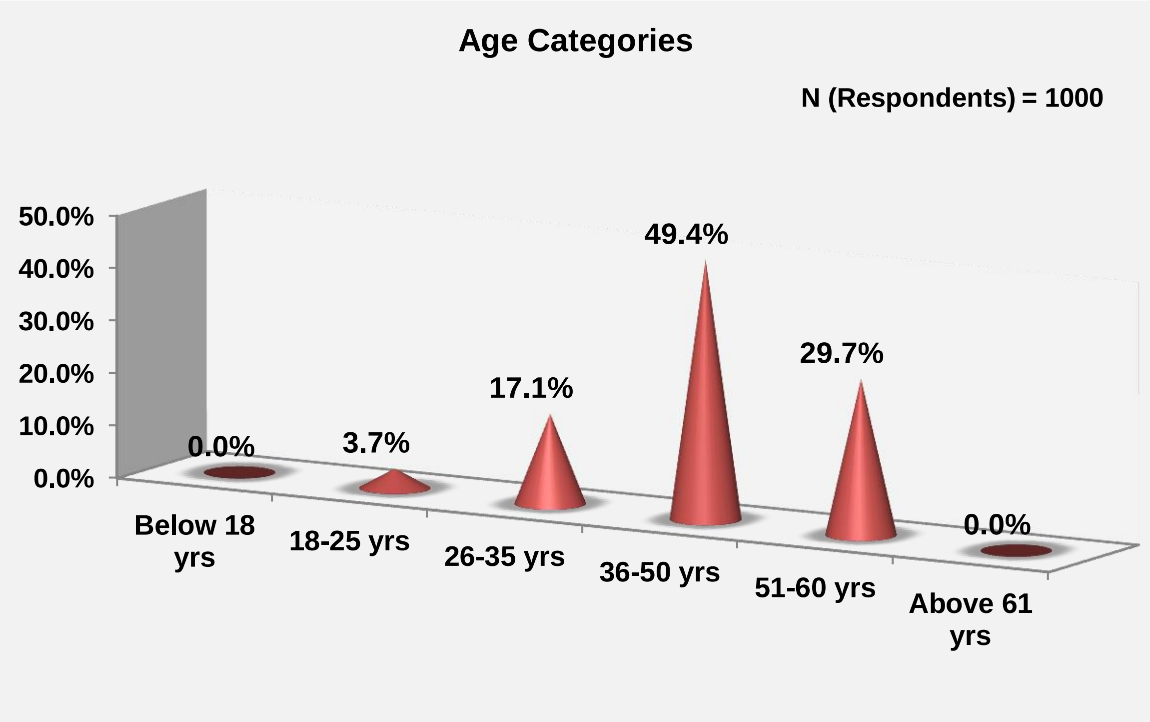
Women constituted only 14% of the total 1000 survey participants of intending travellers from Japan. Overall, 143 prospective female travellers were interviewed during the primary survey across the 2 cities.

Table 22 Respondents by gender		
Gender	No. of respondents	Percentage
Male	857	85.7%
Female	143	14.3%
Total	**1000**	**100.00%**

4.1.1.3 Age categories

17% of the respondents were between 26 to 35 years of age. 49% of the respondents were in the age group of 36 to 50 years. Overall, 67% of the respondents were in their peak productive years between 26 and 50 years of age.

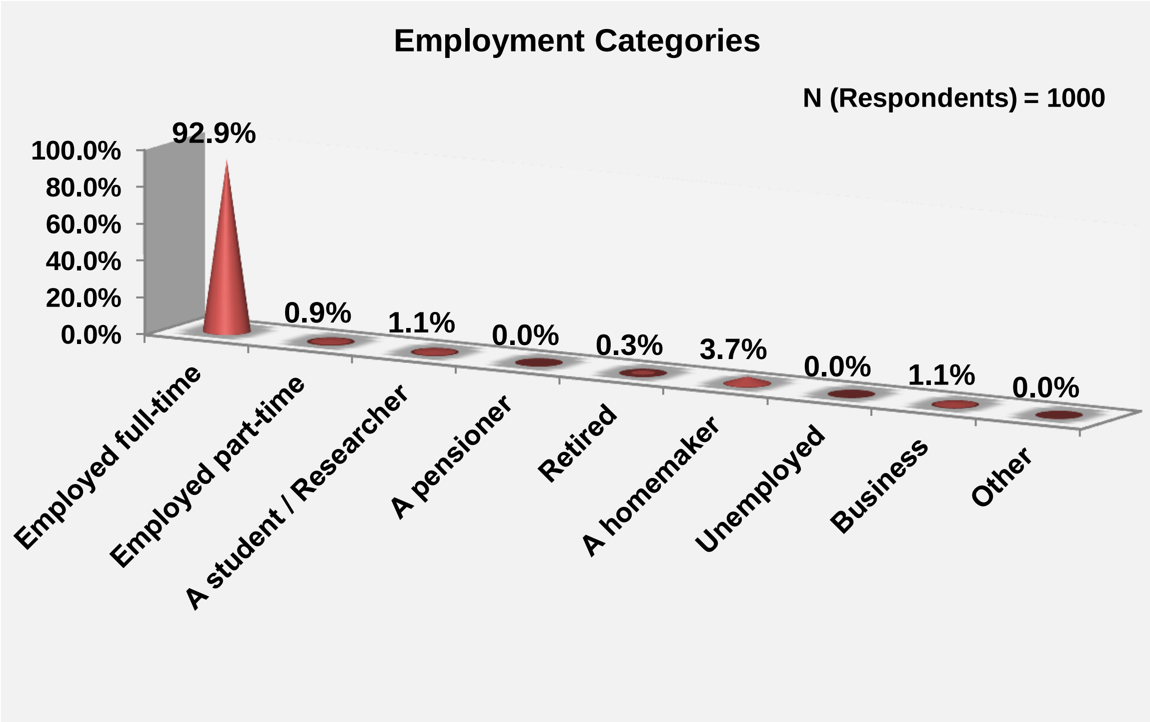
Figure 52: Age Categories



4.1.1.4 Employment status

93% of the total 1000 respondents were employed full time.

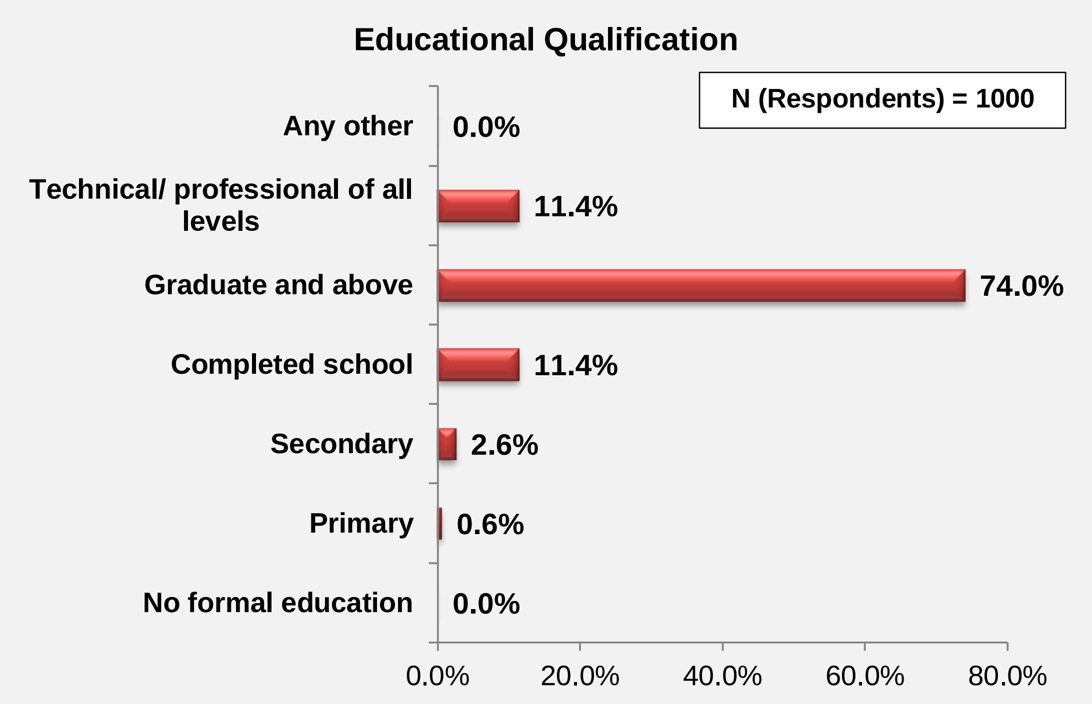
Figure 53: Employment Categories



4.1.1.5 Educational Qualifications

About 74% 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.

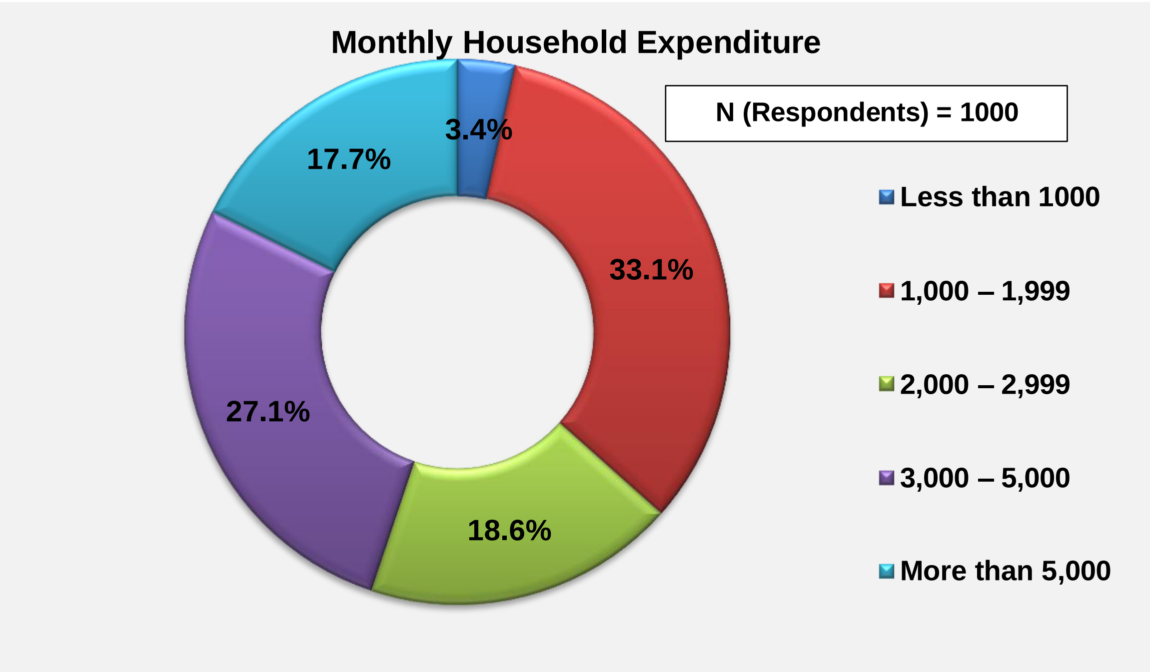
Figure 54: Educational Qualification



4.1.1.6 Household Expenditure per month

18% of the respondents mentioned that their monthly household expenditure was more than USD 5000.

Figure 55: Monthly Household Expenditure

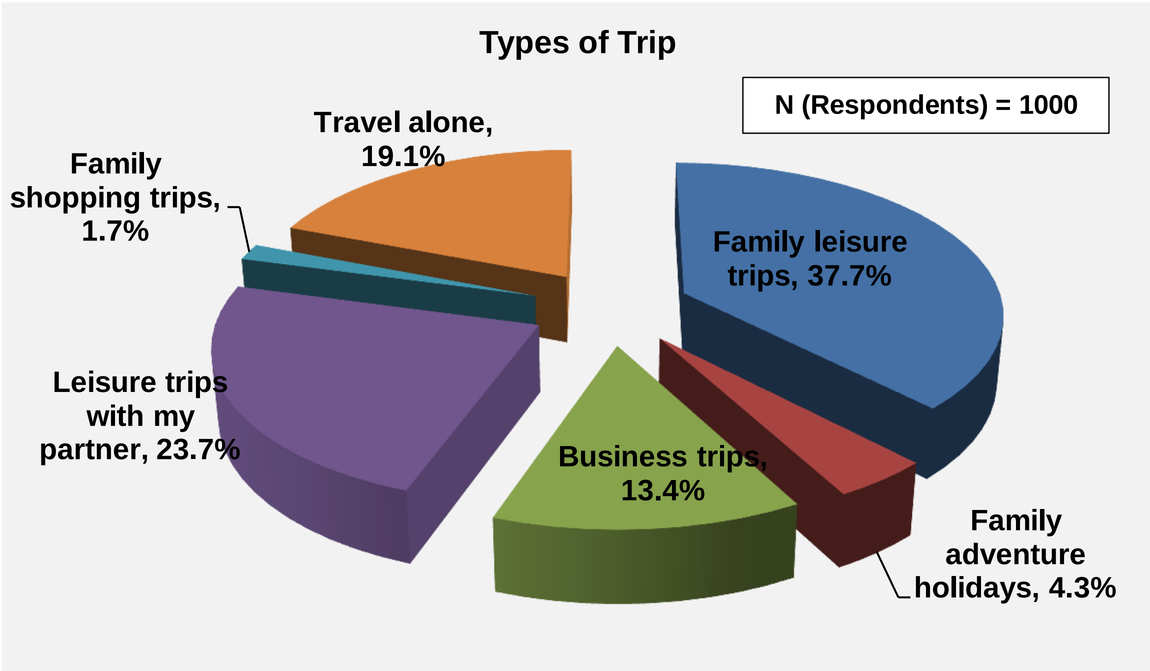


4.1.2 General Travel Behaviour

4.1.2.1 Types of trip

Majority of the respondents wish to primarily go on family leisure trips and family adventure holidays. A considerable section also intends to go for solo trips (19% of 1000 respondents) and leisure trip with spouse or partner (24% of 1000 respondents).

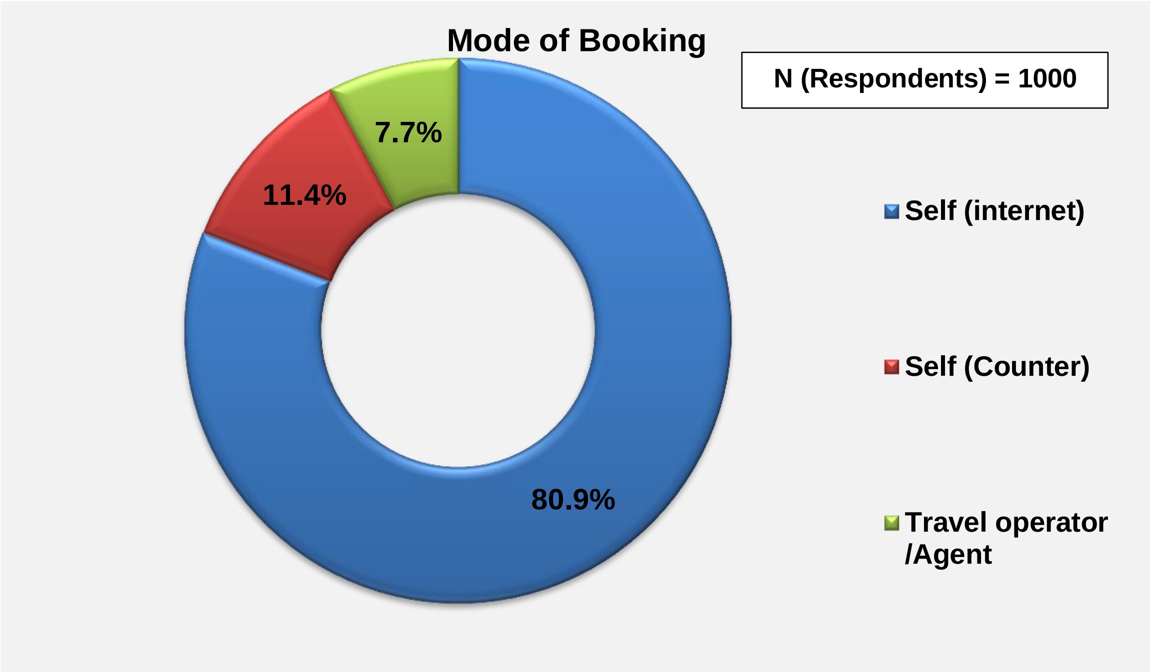
Figure 56: Respondents by purpose of travel



4.1.2.2 Mode of booking

81% of 1000 respondents mentioned that they would book their tickets over the internet while 8% expressed the intention of approaching travel agents. 11% of the 1000 respondents said that they would book their tickets themselves at the counter.

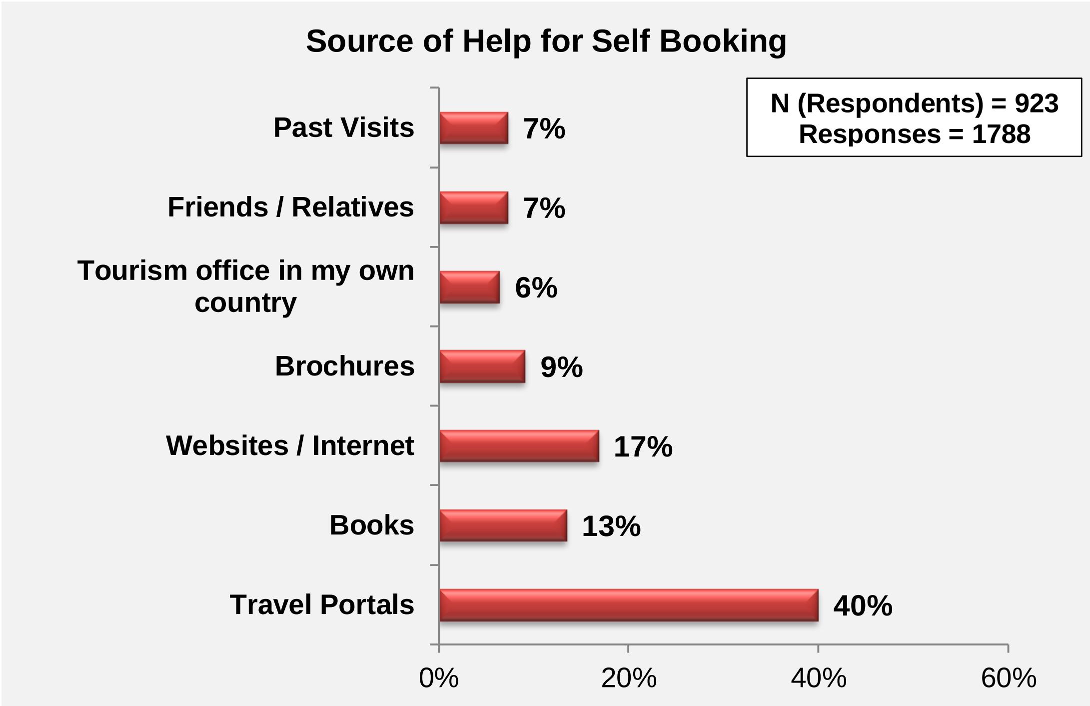
Figure 57: Mode of Booking



4.1.2.3 Sources of help for booking information

The 923 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). 40% of the 1788 responses received revealed that the travel portals was a very important source of information for travellers as well as a powerful tool for sorting out travel modalities. 7% responses showed that on occasion friends and relatives could also be consulted.

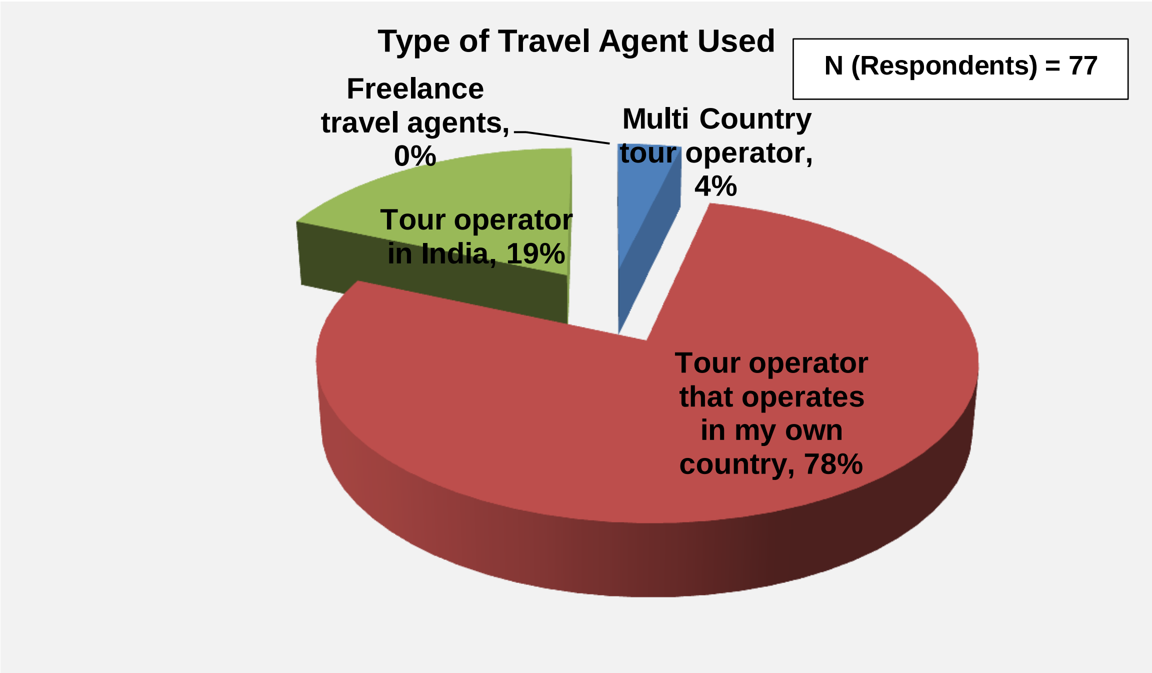
Figure 58: Sources of booking information



4.1.2.4 Type of tour operator used

Among those intending to approach tour operators for ticketing assistance, 78% said that they would approach operators from their own country. Another 4% were willing to approach multi-country operators. Only 19% mentioned that they would approach tour operators from India.

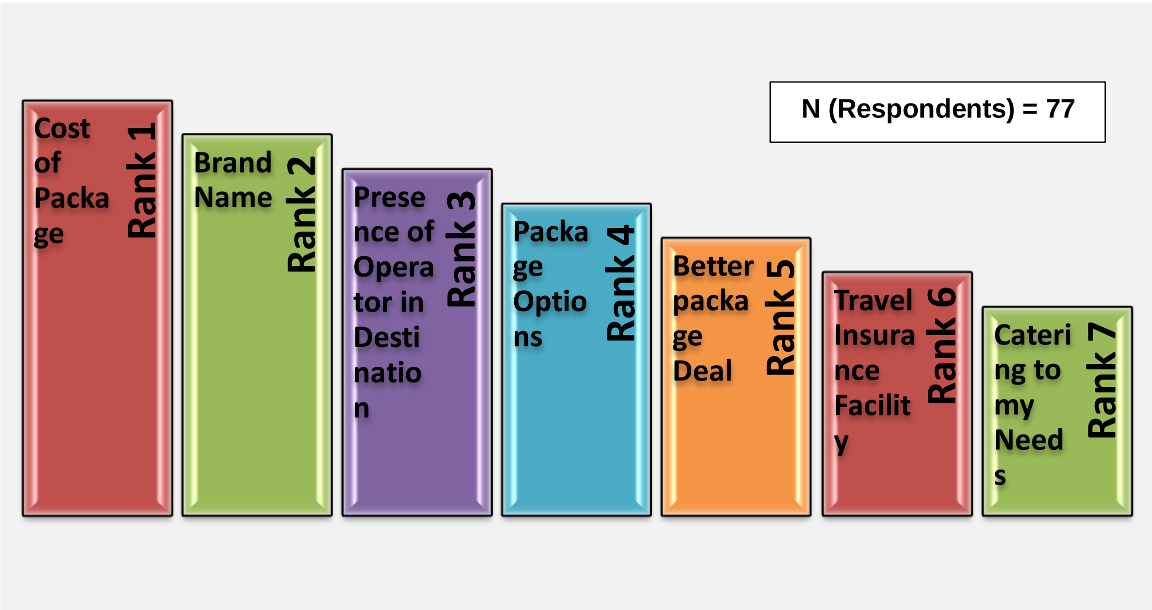
Figure 59: Type of Travel Agent Used



4.1.2.5 Tour operators selection criteria

For these 77 respondents, the cost of package was an important decision point in selecting the tour operator. This was followed by the brand name of the operator.

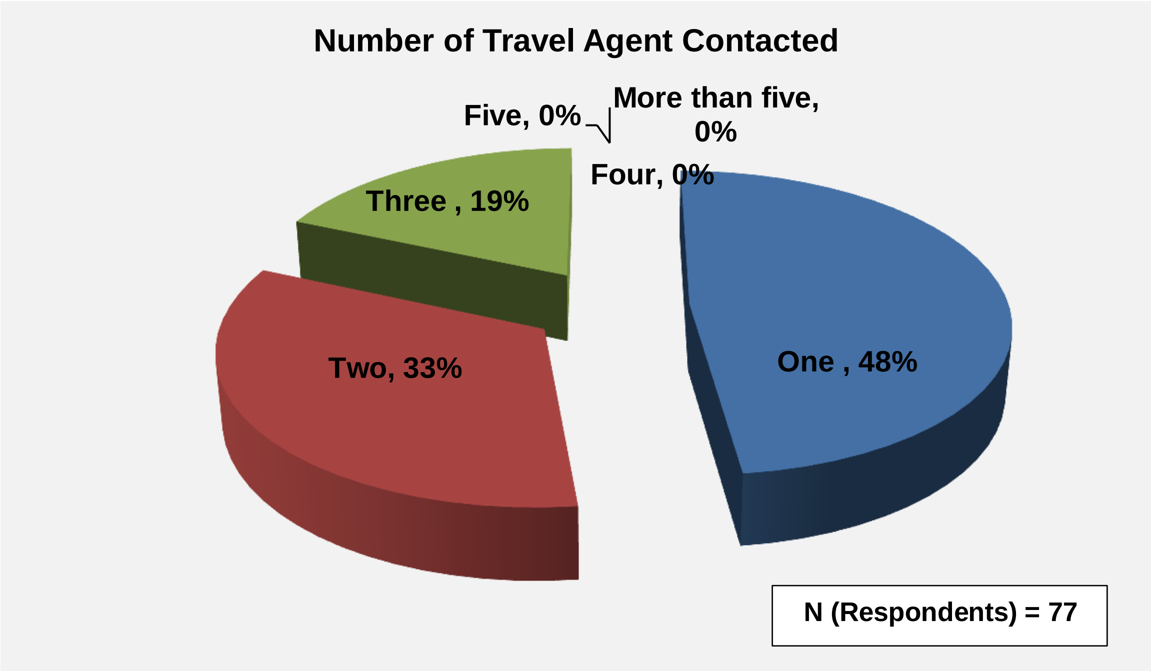
Figure 60: Tour Operator Selection Criteria



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

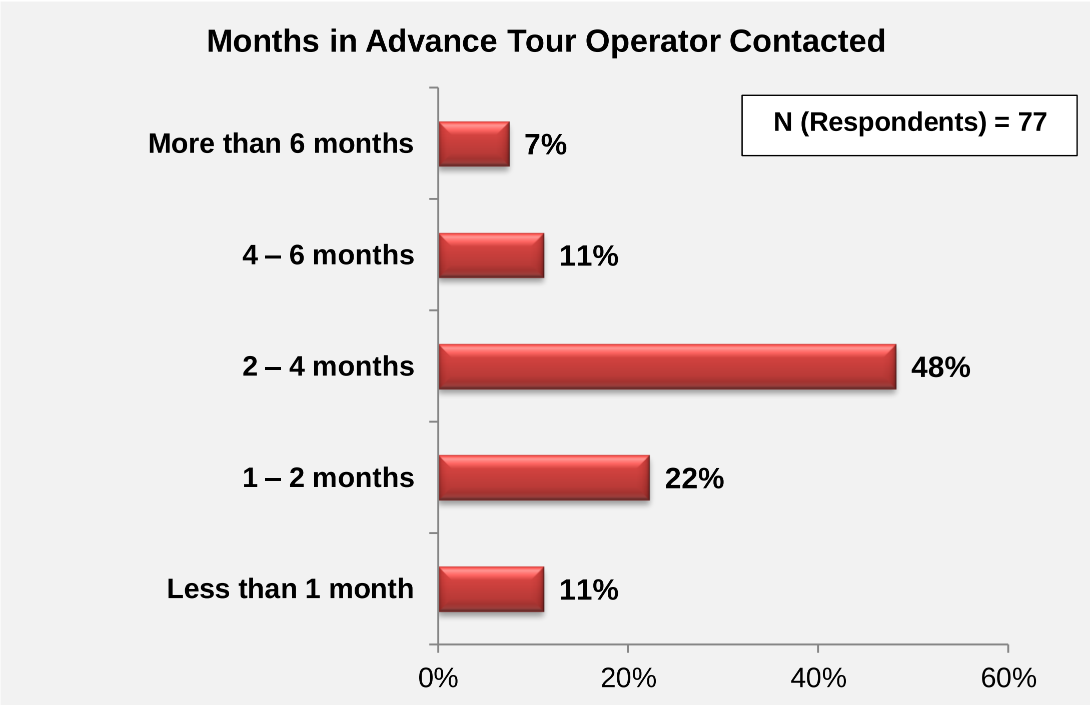
Of the 77 respondents who mentioned that they would approach tour operators, 33% said that they would contact at least 2 operators before reaching a decision. 19% expressed the intention of approaching 3 or more operators before they took a decision.

Figure 61: No. of tour operators the respondents intended to contact before coming to a decision



48% respondents mentioned that they would contact the travel operator at 2 to 4 months in advance. 11% respondents displayed intention of connecting with the tour operator 4 to 6 months in advance.

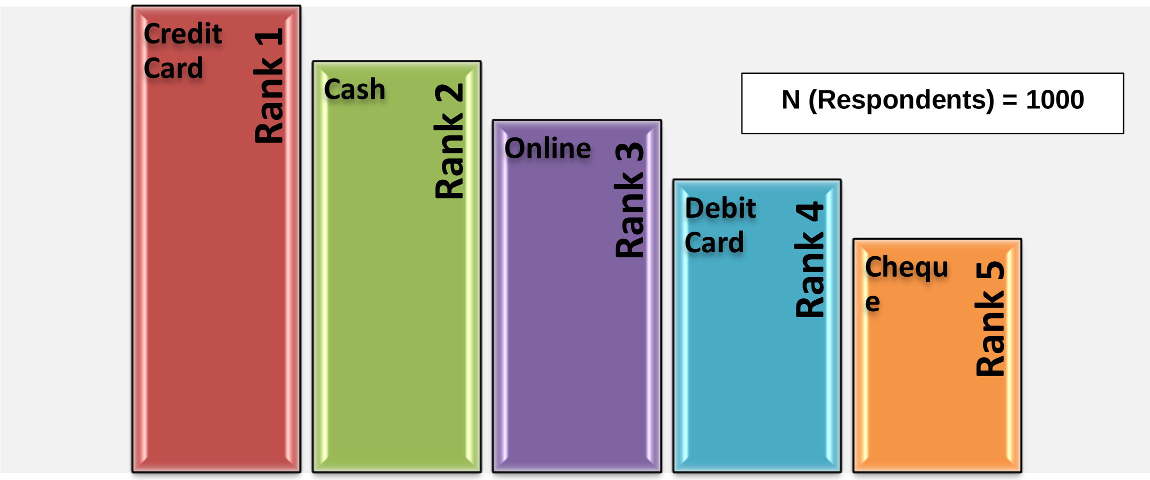
Figure 62: Months in Advance Tour Operator Contacted



4.1.2.7 Mode of payment preferred

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

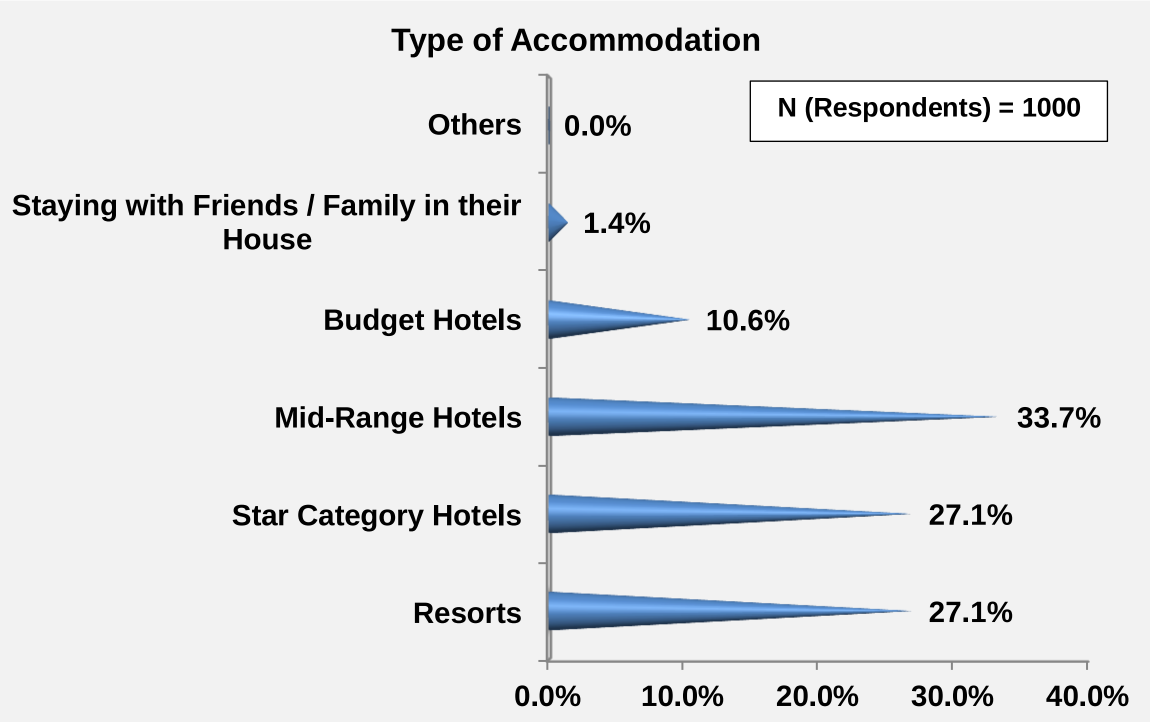
Figure 63: Mode of Payment Preferred



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 27% prospective travellers were willing to look at resorts rather than star category hotels while another 34% stated that mid-range hotels would be their preferred accommodation.

Figure 64: 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 65: Expenditure across cost baskets

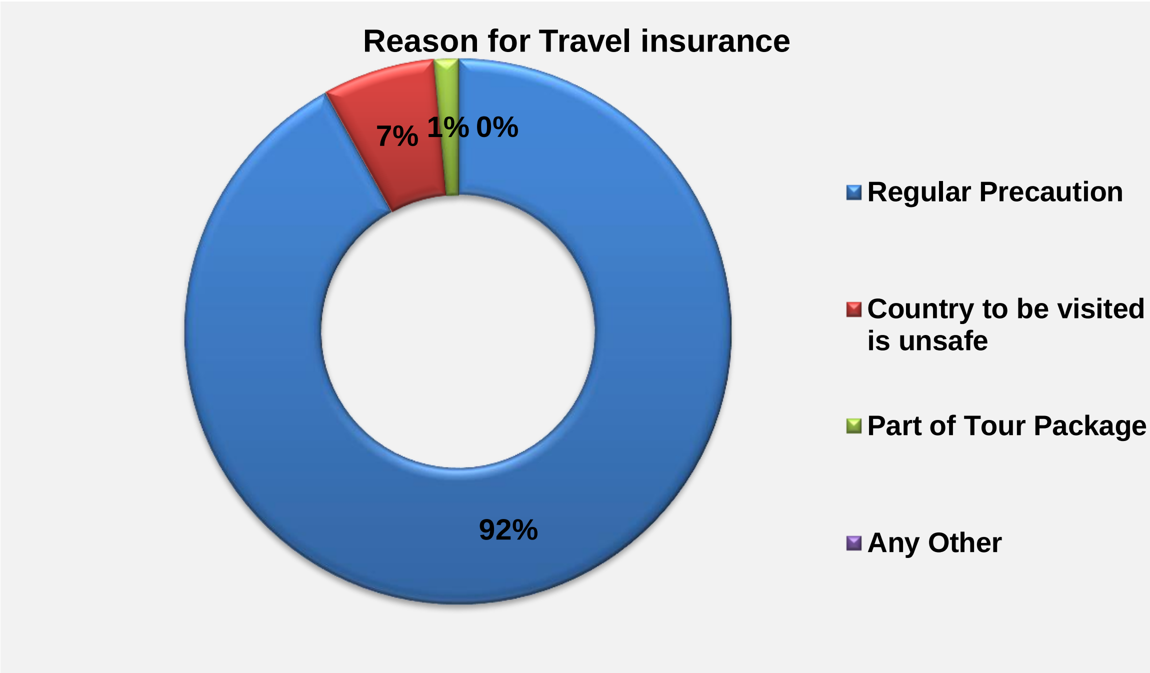
N (Respondents) =1000

Package Cost	Cost Heads	Non-package Cost
USD 1043	Accommodation	USD 975
USD 1317	International Travel	USD 1067
USD 353	Local Travel	USD 276
USD 308	Food & Alcohol	USD 281
USD 184	Other	USD 213
USD 3205	Total	USD 2812

4.1.2.10 Reason for availing travel insurance if any

60% of prospective travellers (1000 respondents) wished to opt for travel insurance. Majority (92%) said that this was part of regular precaution they took while travelling.

Figure 66: Reason for Opting of Travel Insurance


Reason for Travel insurance
7%
1%
0%
92%
Regular Precaution
Country to be visited is unsafe
Part of Tour Package
Any Other

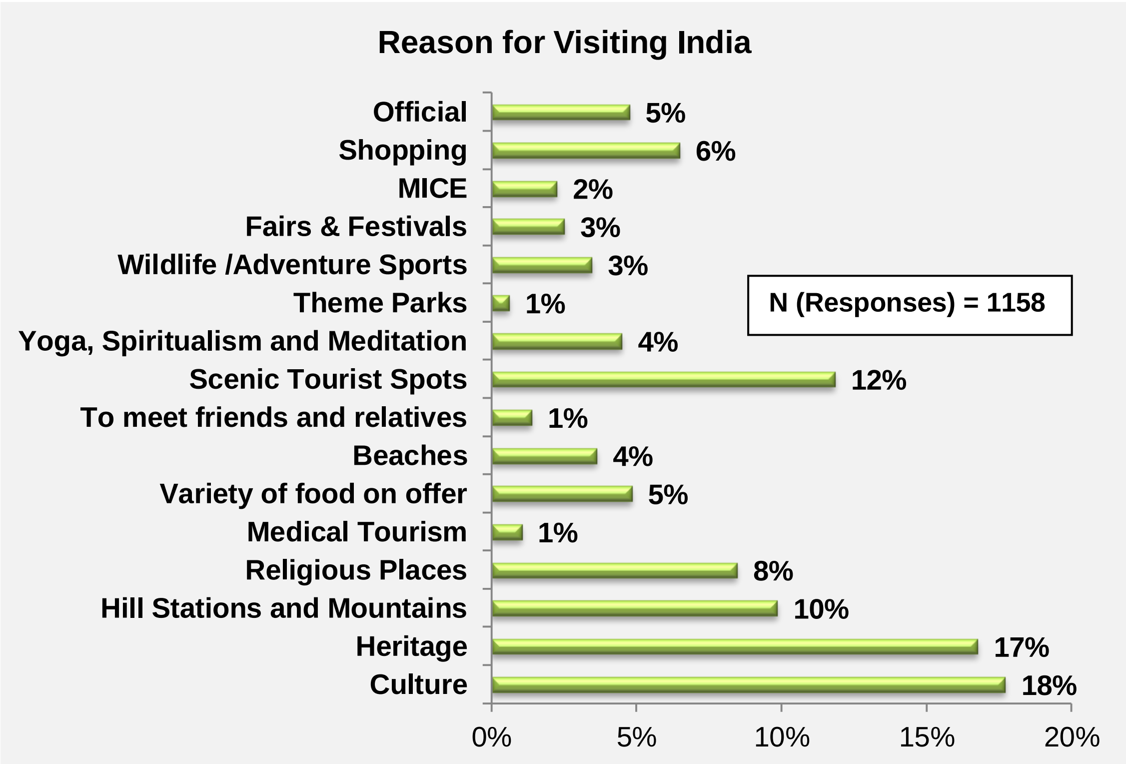
4.1.3 Travel Behaviour of Prospective Visitors to India

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 1158 responses were received from the 250 respondents of which 18% responses indicated the desire to see the culture of India as the driving reason.

Figure 67: Reason for choosing India for next trip



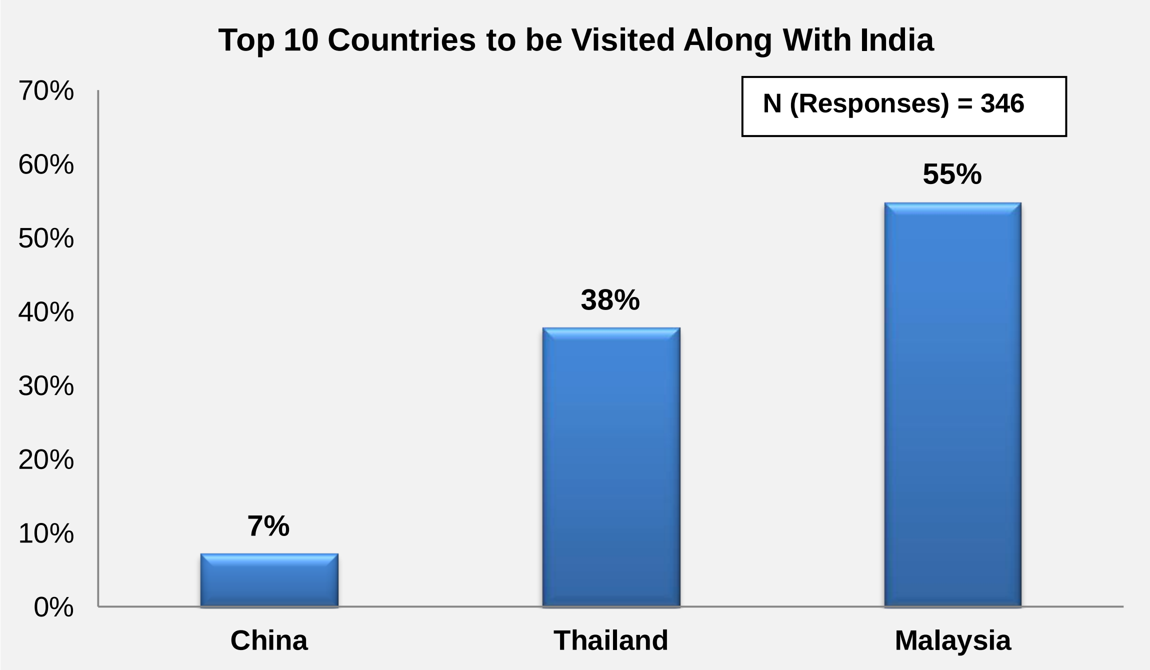
4.1.3.2 Intention of visiting only India or as part of a sub-regional trip

79% 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

55% of these 52 respondents intended to visit India as part of a regional tour to South Asia mentioned Malaysia in their schedule.

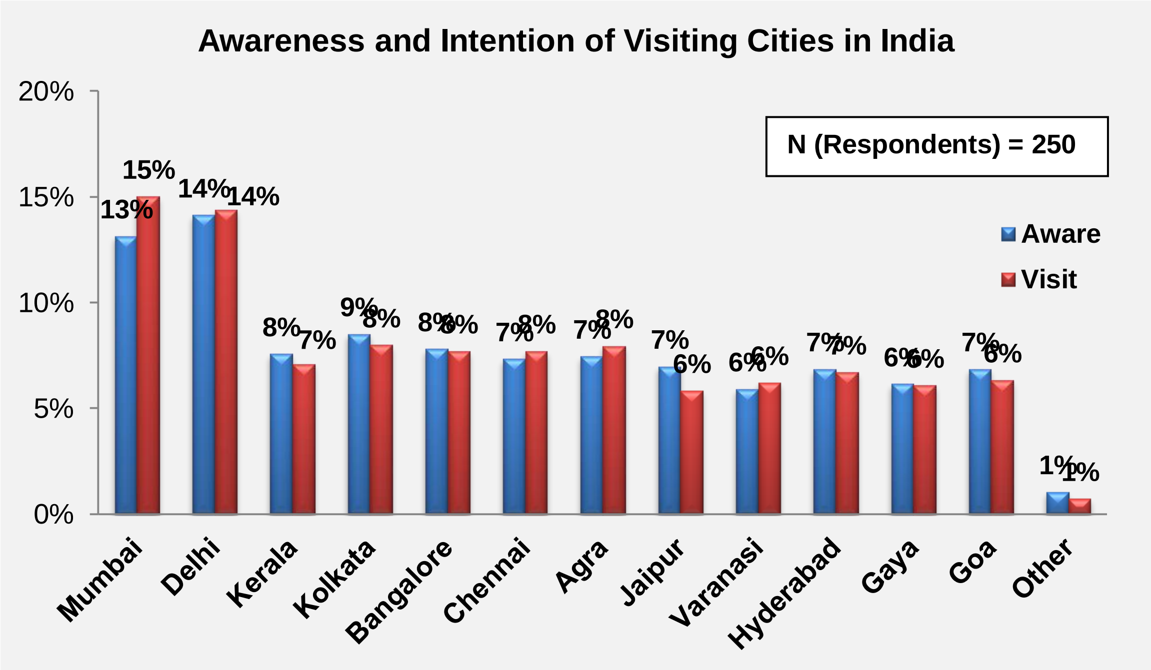
Figure 68: Top 10 Countries to be visited along with India



4.1.3.4 Awareness and intention of visiting destinations in India

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

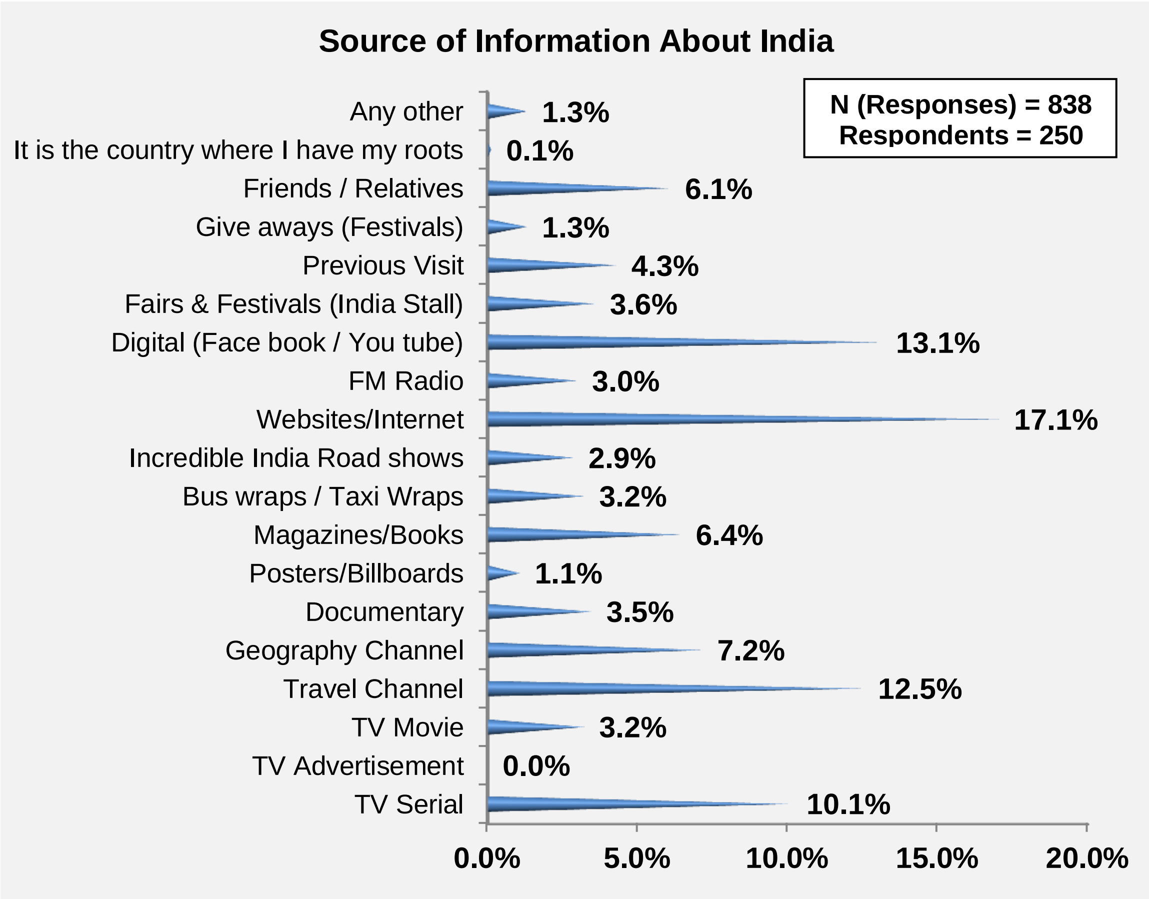
Figure 69: Awareness about a destination and its traction for the visitor



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 websites and internet; about 17% of responses received indicated this. 13% of all responses indicated that Facebook/ YouTube were an important source of information.

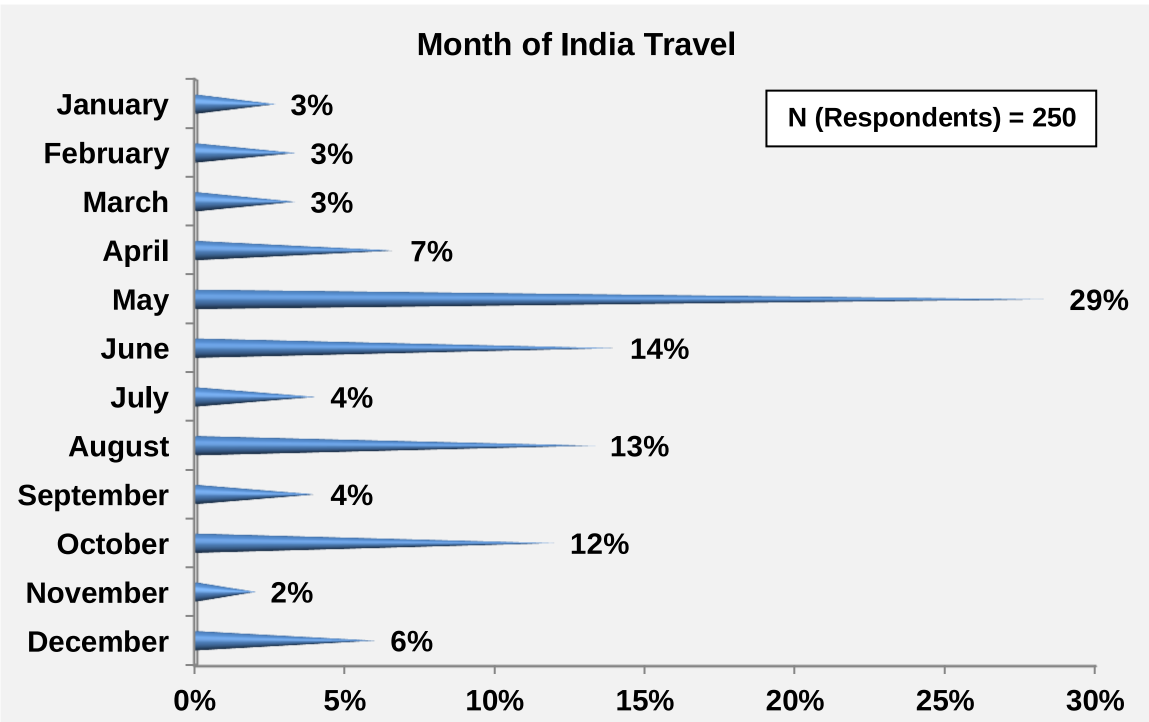
Figure 70: Sources of information about India



4.1.3.6 Time of visit to India

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

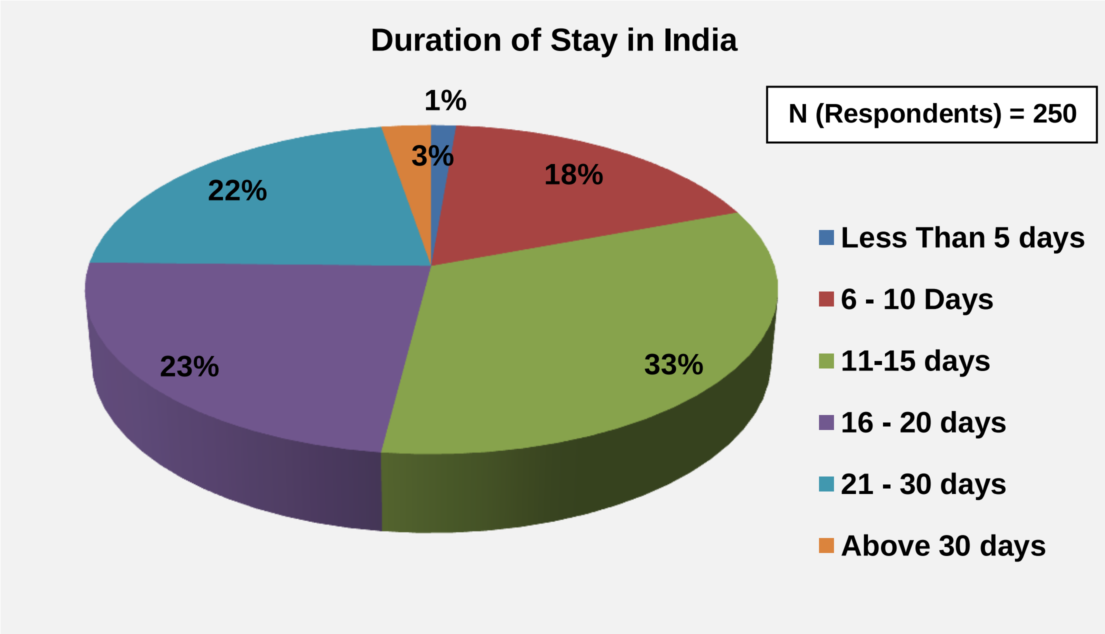
Figure 71: Preferred month for potential visit to India



4.1.3.7 Duration of stay

33% of the 250 respondents intend to stay for a period o11 to 15 days in India. 18% intended to stay for 6 to 10 days.

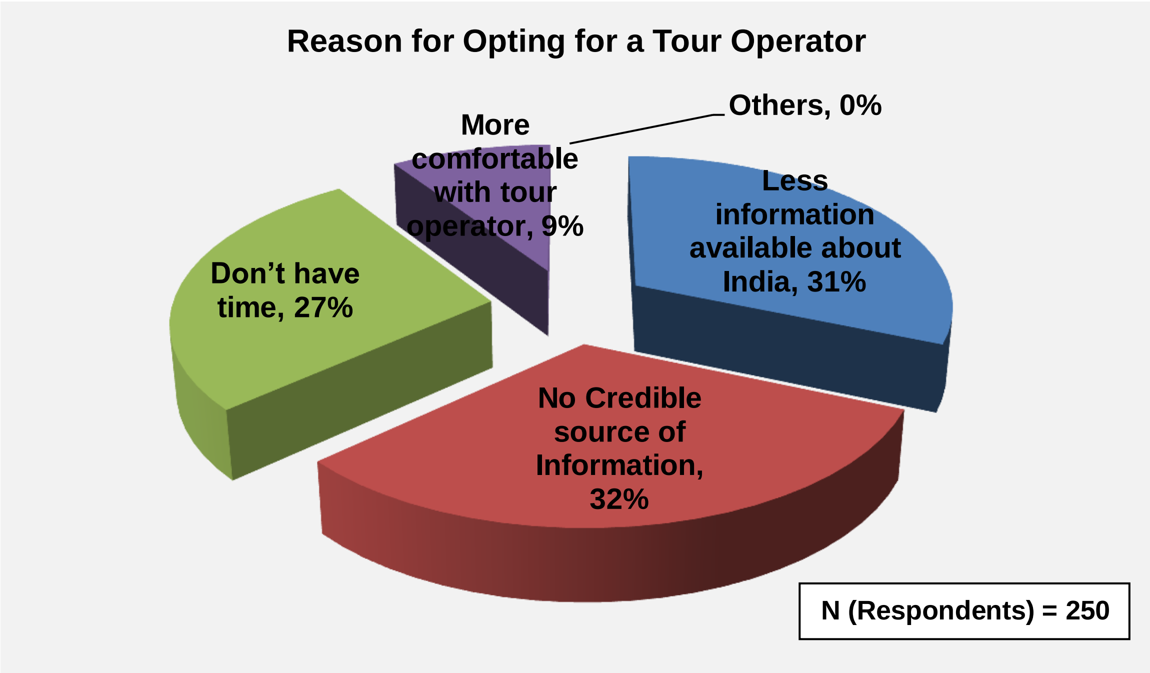
Figure 72: Duration of Stay in India



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, all the respondents mentioned they were more comfortable with tour operator for their India trip.

Figure 73: Reason for Opting for a Tour Operator



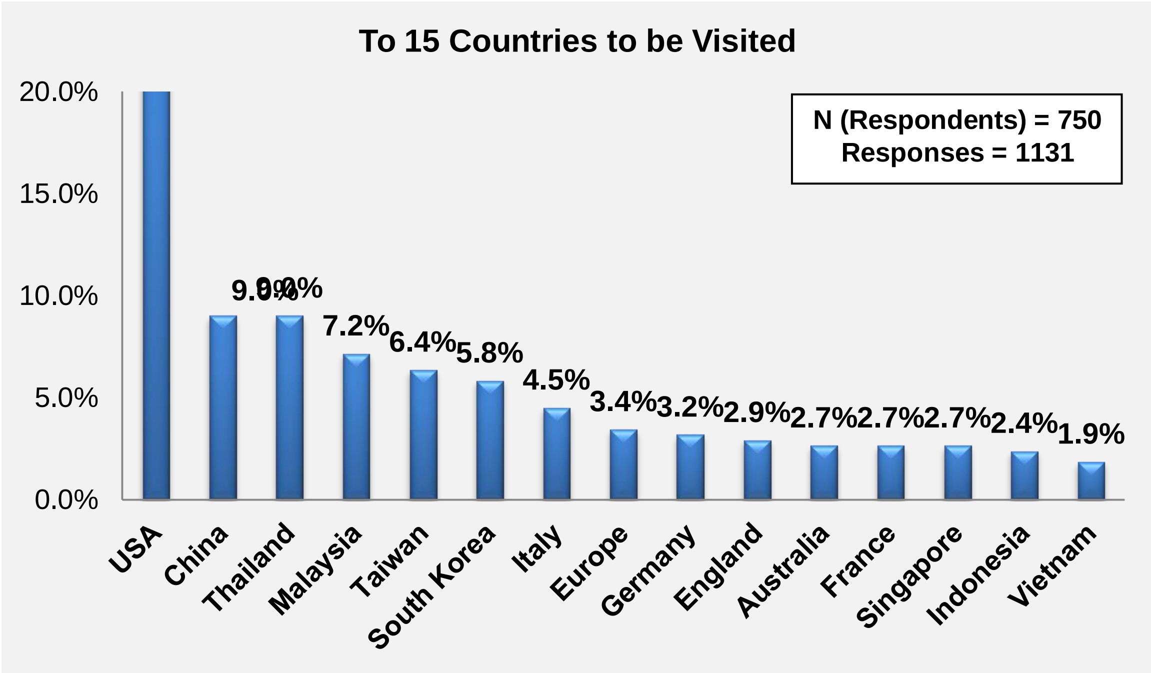
4.1.4 Travel Behaviour of Prospective Visitors to Other Countries

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, China, Thailand, Malaysia, and Taiwan.

Figure 74: Favored destinations for those intending to travel to countries other than India



4.1.4.2 Drivers / reasons for visiting foreign locales

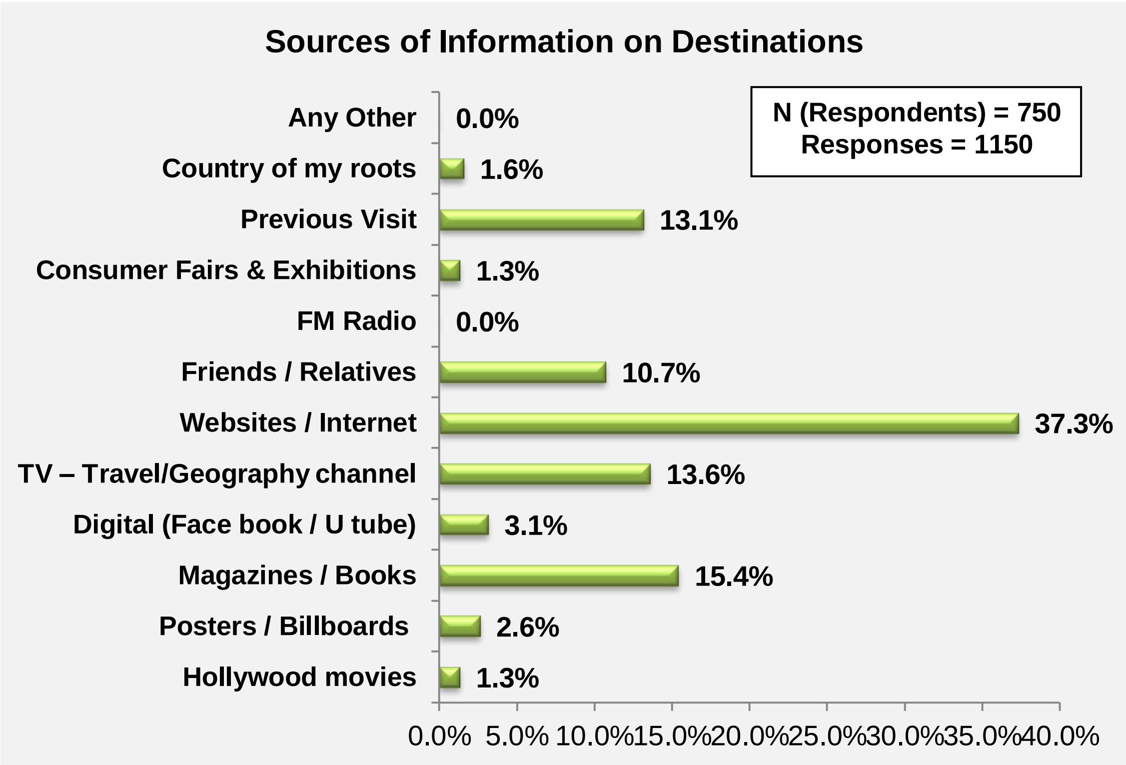
Respondents were asked the main reasons why they intended to travel overseas in the near future. The top most reason for travel was cited as leisure/recreation (77.5% respondents of 750). The other important driver was visiting for business (15.5% of 750 respondents).

Figure 75: 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. 1150 responses were yielded by 750 respondents. Important sources of information regarding destination countries are internet followed by magazines/ books— 37.3% and 15.4% of responses respectively.

Figure 76: Sources of information about destination countries



4.1.4.4 Awareness of India as a tourist destination

6% of 750 respondents were aware of India as a potential destination before they took their decision to head elsewhere.

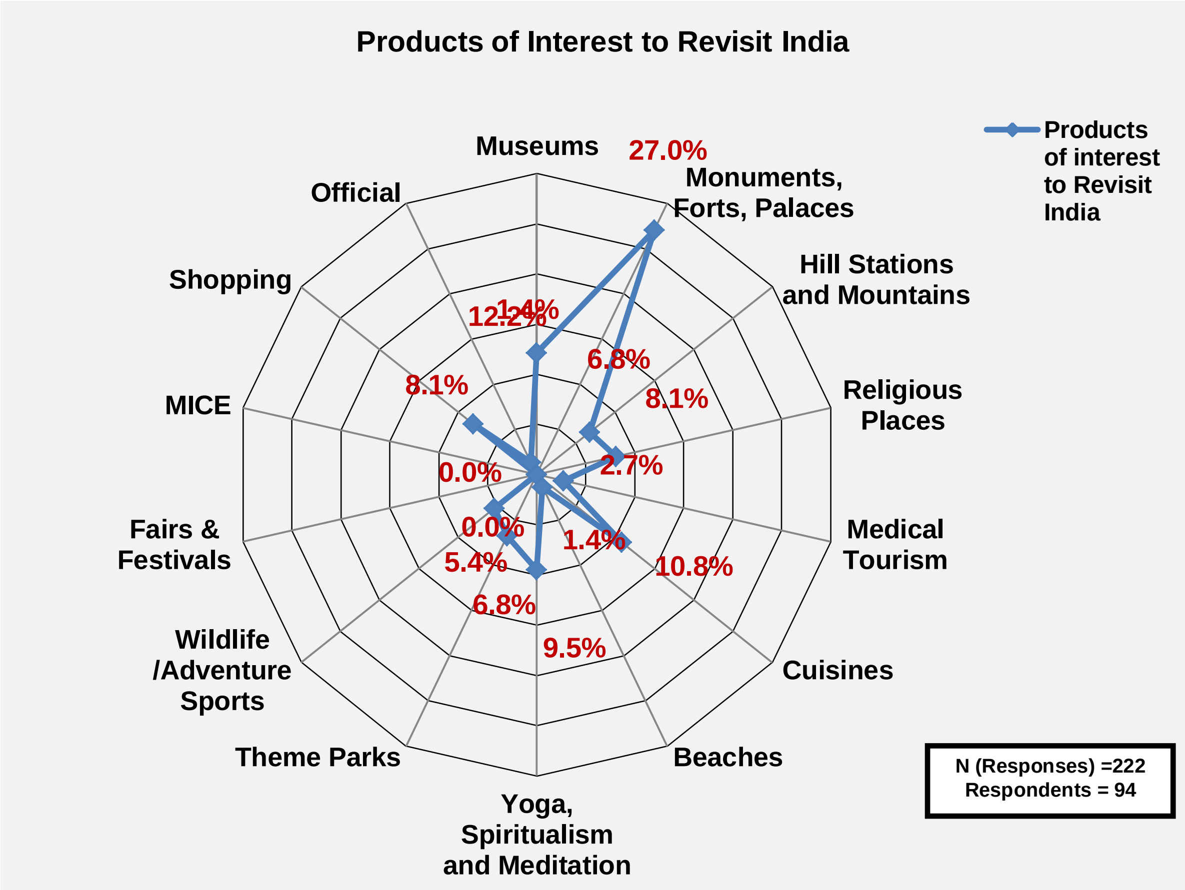
4.1.4.5 Intention of visiting India

About 12.5% of the 750 respondents expressed their intention to visit India next time. 656 respondents were clear that they would not be visiting India is any subsequent visit.

4.1.4.6 Primary attractions of India / motivation for visiting India

Those 94 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 222 responses as multiple options were permitted. They evinced interest in India's monuments, forts and palaces as the most attractive motivation (27% of responses).

Figure 77: Primary attractions in India

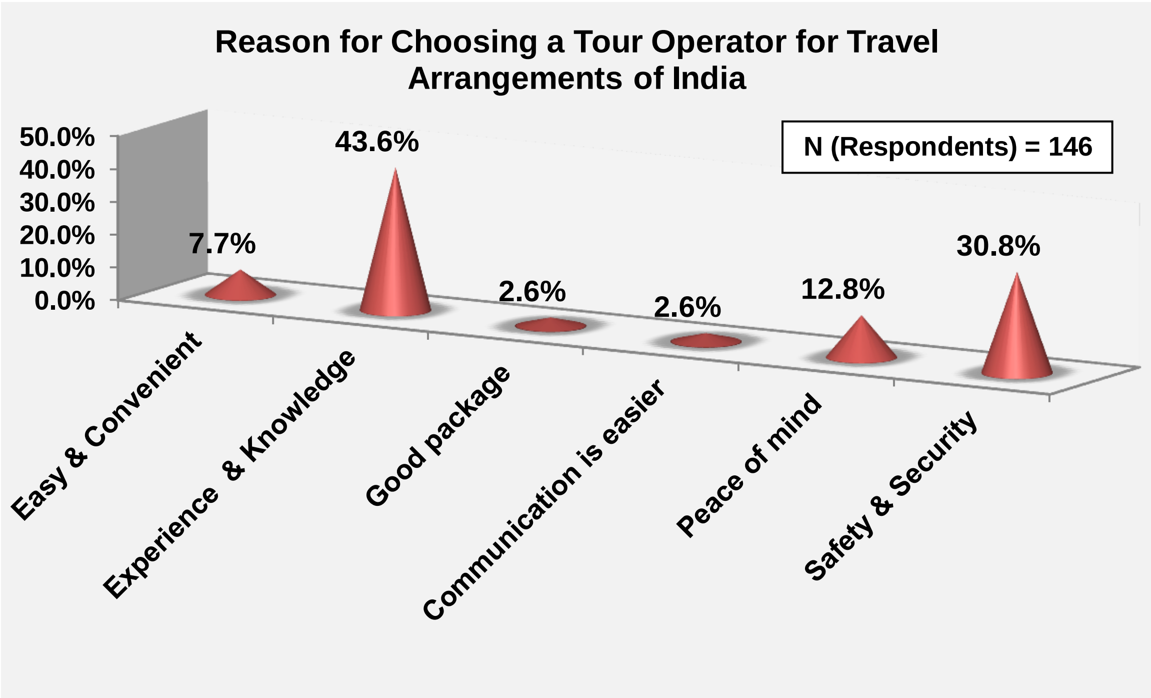


4.1.4.7 Intention and reason for choosing an intermediary for India travel

80.5% 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, 146 persons expressed their intention of hiring a tour operator.

43.6% felt that the intermediary would provide better knowledge about India and has more experience of India. Another 30.8% felt that going through a tour operator would provide relevant safety of trip.

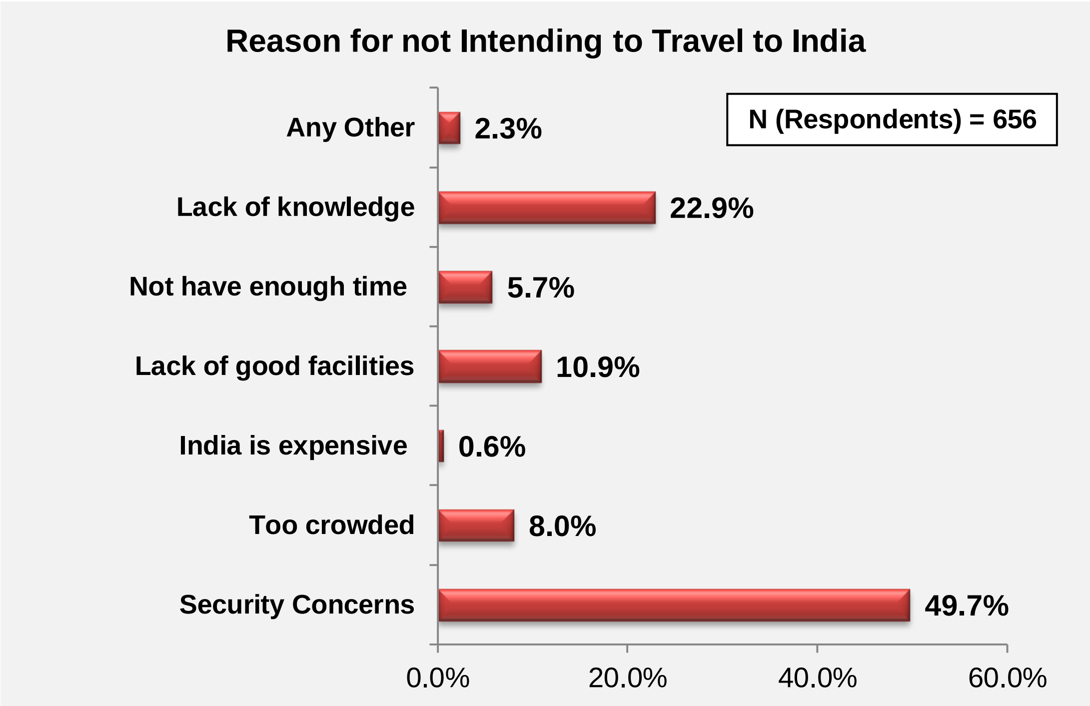
Figure 78: Reason for Choosing a Tour Operator for Travel Arrangements in India



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

The 656 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 (49.7% respondents).

Figure 79: Reasons for not intending to travel to India



But 41% respondents, at the end of the interview mentioned that they would indeed like to visit India at some point in the future, if not immediately.

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

4.1.5.1 Accommodation Availed by Intending Travellers

Among prospective travellers who headed to India, a large percentage (36%) stayed in star hotels whereas travellers who headed to other countries, only 21% stayed in star hotels.

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

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
24%	Resorts	30%
36%	Star Category Hotels	21%
30%	Mid-Range Hotels	37%
10%	Budget Hotels	11%
0%	Staying with Friends / Family	3%
0%	Others	0%

4.1.5.2 Package Expenses of Intending Travellers

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

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

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
1241	Accommodation	895
1375	International Travel	1275
406	Local Travel	314
373	Food including alcohol	259
231	Others	149
3626	Total	2892

4.1.5.3 Non-Package Expenses of Intending Travellers

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

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

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
1129	Accommodation	860
1341	International Travel	861
305	Local Travel	254
285	Food including alcohol	277
229	Others	201
3289	Total	2453

4.1.5.4 Preferred Mode of Payment of Intending Travellers

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

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

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

2	Cash	2
5	Cheque	5
3	Online	3
1	Credit Card	1
4	Debit Card	4

4.1.5.5 Mode of Trip Booking of Intending Travellers

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

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

Intending Travellers to India	Payment Mode Categories	Intending Travellers to Other Countries
74%	Self (Internet)	86%
15%	Self (Counter)	9%
11%	Travel Operator /Agent	5%

4.1.5.6 Source of Booking Information for Intending Travellers

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

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

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
22%	Travel Portals	36%
17%	Books	17%
22%	Websites / Internet	34%
12%	Brochures on Country	1%
8%	Country Tourism office in my own country	1%
9%	Friends / Relatives	4%
9%	Past Visits	6%

4.1.5.7 Type of Travel Agent Used by Intending Travellers

For both prospective travellers who headed to India and those who headed for other countries, majority (71% and 90% of respondents for India and Other countries respectively) did their bookings through tour operators based in their own country.

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

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
0%	Multi Country tour operator	10%
71%	Tour operator that operates in my own country	90%
29%	Tour operator in India	0%
0%	Freelance travel agents	0%

Chapter Five

India Tourism Office – Survey Findings

5.1 India Tourism Office

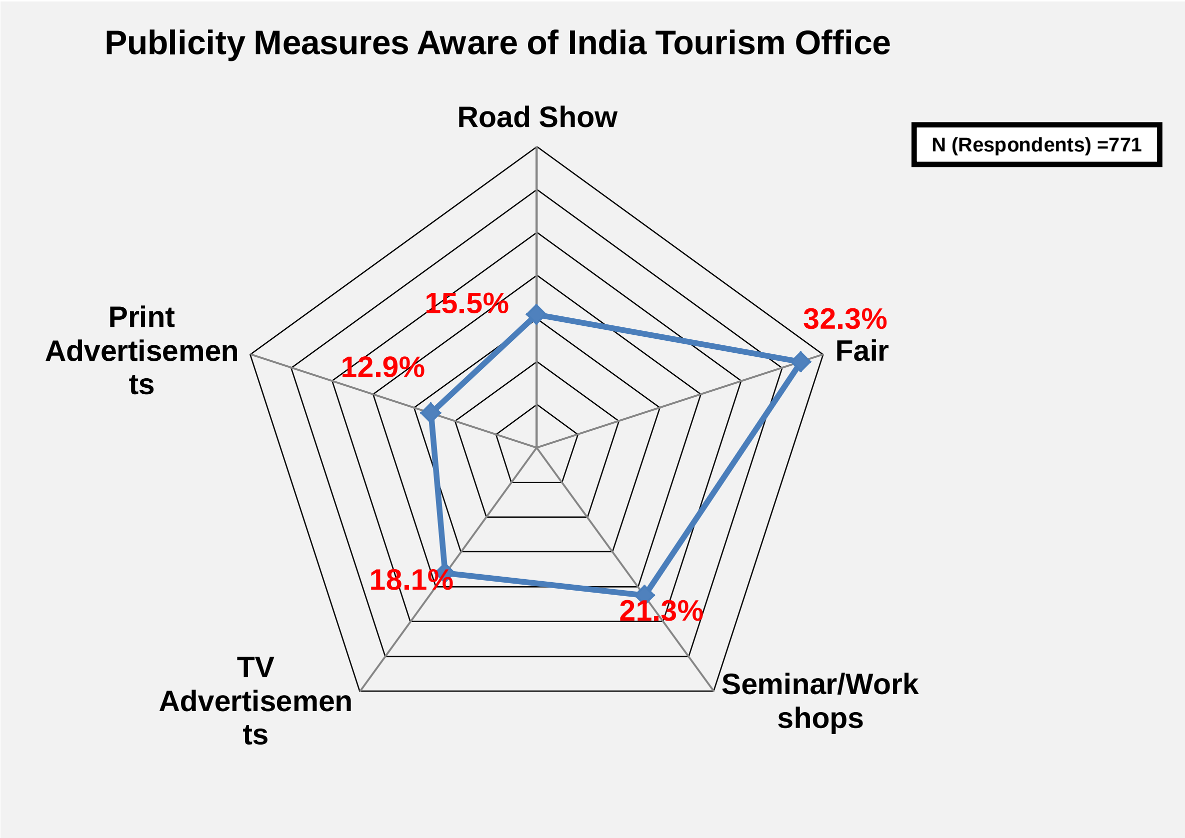
5.1.1 India Tourism Activity Response of Past Travellers

The survey had specific focus on the impact of the promotional activities of India Tourism Office in Japan. 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

74% 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 77% were also aware about its promotional campaigns. They had learnt of India Tourism Offices from promotional campaigns disseminated through fairs (32.3% of respondents), Seminar/ workshops (21.3% of respondents) and TV advertisements (18.1% of respondents).

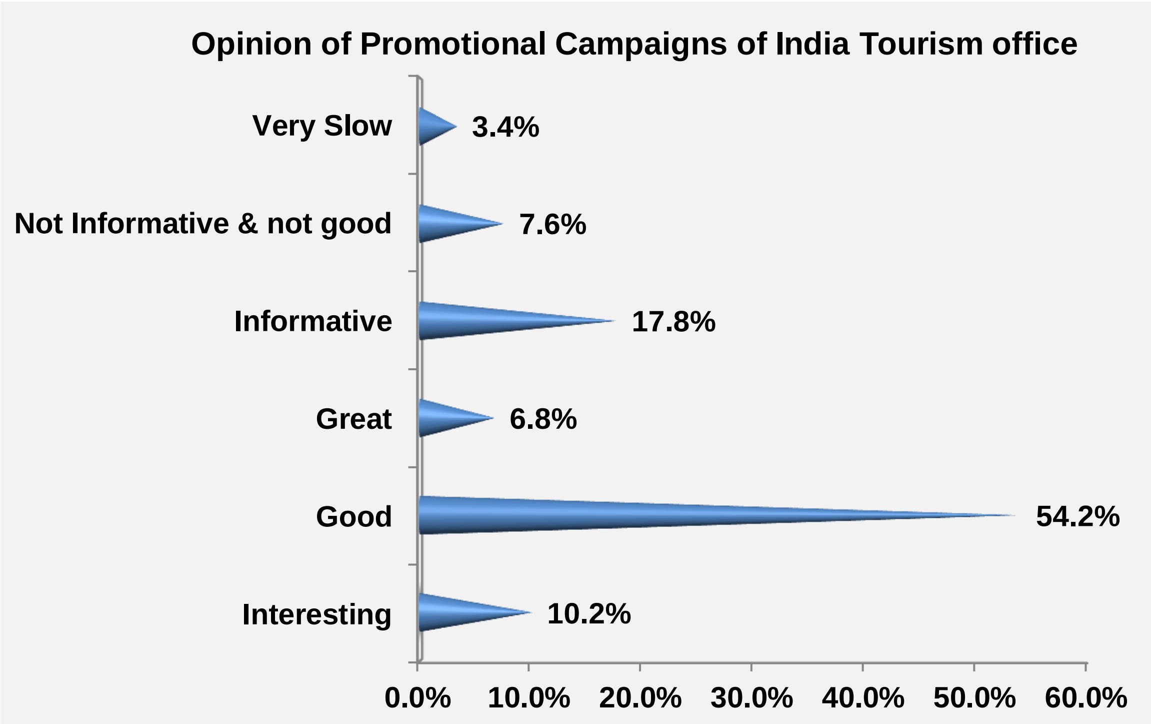
Figure 80: Source of information about India tourism office



5.1.1.2 Effectiveness of promotions and activities

As many as 54% of the 590 respondents who answered about their opinion on the promotion campaigns of India Tourism office in Tokyo, felt that these promotional campaigns were good but there was no clear message which it was trying to give. The promotional activities need to be more focussed to a product or a theme or a state rather than projecting India as a whole. Though there was no dearth of brochures available about Indian Tourism but it had to be promoted on search engines.

Figure 81: Opinion of Promotional Campaigns of India Tourism office



5.1.1.3 Influencing ability of promotional campaigns by India tourism office

44.3% 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

47% 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, 64% were aware of an India Tourism Office in Tokyo.

5.1.2.2 India tourism office approached or not

56% 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 90 persons who approached the India Tourism Office, 89%, that is 80 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

28% of the 250 respondents felt that the Indian Tourism Office was playing a positive and good role in promoting India as a tourist destination.

Figure 82: Role of India tourism office

5.1.3 India Tourism Activity Qualitative Evaluation

The tour operators were in praise of Indian Tourism Office in Tokyo for their helpful and amiable nature. The main problem that exists in the India Tourism Office in Tokyo is that there is no Japanese speaking staff in the India Tourism Office and the Japanese tourists interested in going to India cannot communicate with the staff when they walk in for information. Only Japanese tourists who can communicate in English can communicate with the staff at the India Tourism Office. It is essential that India Tourism Office Tokyo includes staff who are fluent in Japanese so that the Japanese potential tourists who walk in for information are at ease in communicating their requirements and are informed accordingly.

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 Japanese tourists to India. One prime example put forward was that the brochures that are present in the India Tourism Office in Tokyo are all in English and not much present in the local language. This prohibits the potential tourists from being informed properly about India. Also the India tourism website is not present in the Japanese 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 Tokyo should take an active step in addressing is that of the Visa issuance. Though visa on arrival is present for Japanese citizens visiting India, the Japanese in general prefer having everything arranged before undertaking a trip and hence prefer their visas done in Japan before arriving in India. The visa form they feel is very lengthy with some questions which are difficult for them to answer. Also the visa rules keep changing and the trade is also not informed about the changes. The rules, feel both trade and tourists, are ambiguous and no one is present to guide them. Moreover, the visa issuance has been handed over to a third party firm where the staff is from Philippines and the office is headed by a Sri Lankan and the tourists face difficulty is communicating with the staff. The normal visa fee is 490 yen, but now they are charging 730 yen extra as handling and courier charges which has not been mentioned on the website. As majority of the visa applicants in Japan apply through agents, the agents have to be paid separately apart from per passport they have to pay 730 yen extra. All this is causing scare in the minds of the Japanese traveller, that, even before entering India all this is there so what shall happen once they enter India. It is therefore suggested by trade that a visa guidance helpdesk be present at the India Tourism Office in

Tokyo with the presence of local staff who can effectively guide the tourists. Also it is suggested by the tour operators that the changes in rules or guidelines for visa be intimately to them through emails and newsletters so that the operators themselves can guide tourists accordingly.

They felt that while the India Tourism Offices were 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 events where JATA is also invited by India Tourism Office and an interface is created where tour operators from both the countries can share information and create business partnerships which will increase in sending more Japanese tourists to India.

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

1. Local staff in the office fluent in Japanese
2. Visa helpdesk for sorting out issues and guidelines
3. Information on Japanese speaking guides who the tourists can contact in India for their tours
4. India Tourism website be local language as well as English
5. More events with JATA and Indian tour operators
6. Information about modern India & New India. Message that India is not a beach destination neither it is for kids
7. More communication with trade. Regular updates about events and activities
8. Offering more support in terms of promotional material and campaigns, more enrolment with trade;
9. Help in visa- and passport-related issues and regular notifications to trade regarding any change in visa rules and regulations

10. Educate agents/ trade about our products i.e. write ups, latest trends in India, change the theme every time
11. Provide ads in local language
12. Arranging Bollywood nights as Bollywood is an attractive draw from Japanese
13. Having ads with Bollywood celebrities

Chapter Six

Future Outbound Travel Projections

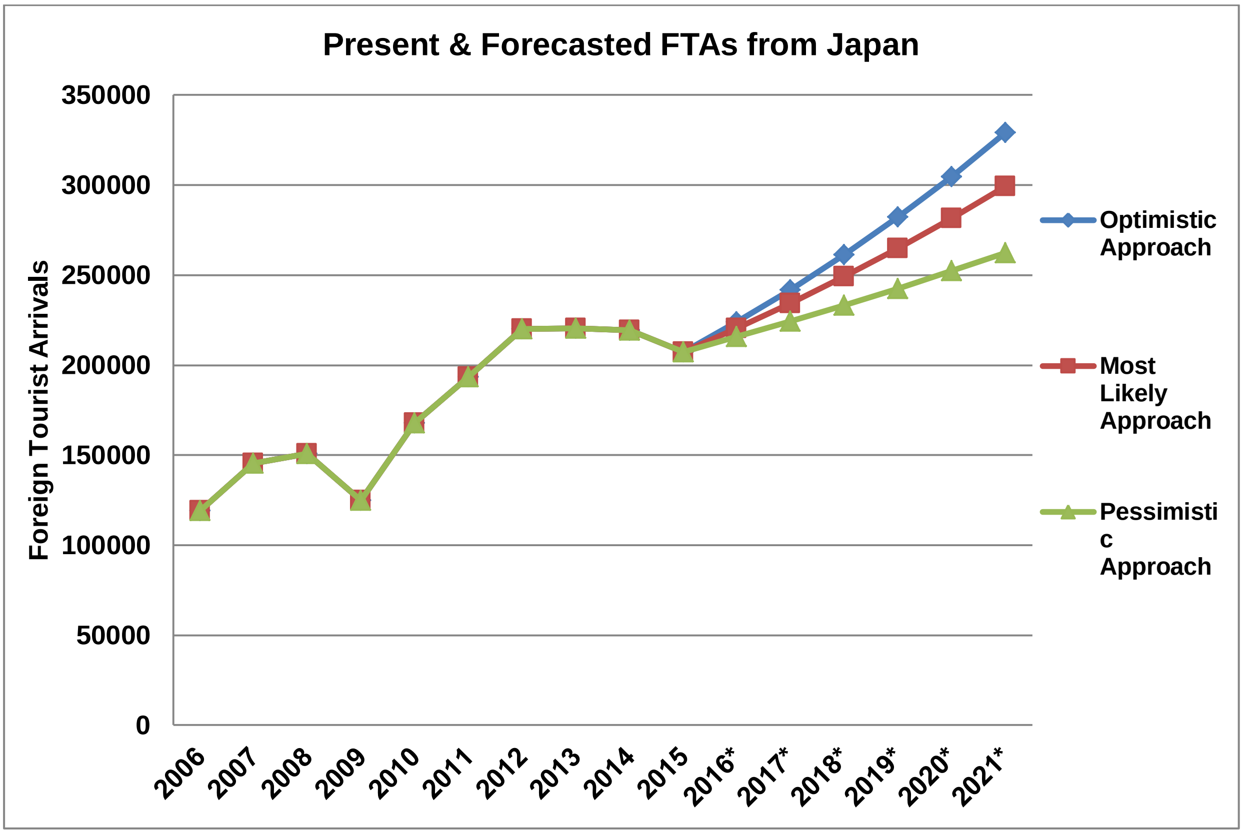
6.1 Projections for Future Outbound Travel

6.1.1 Method of Forecasting

To arrive at the future trends of FTA's we have considered three possible approaches i.e. "***Most Likely Approach***" which is the approach based on the current growth trends- we have considered a compounded average growth rate (CAGR) of 6.3% for the period 2006 to 2015. "***Optimistic Approach***" assuming that all factors considered for the forecast grow at a constant rate- we have taken the rate at 8%. "***Pessimistic Approach***" - assuming the possibility that any future calamity can affect the factors considered- we have taken the rate as 4%. These approaches are captured in the forecast illustration below.

6.1.2 Forecast of Outbound Tourists from Japan

Figure 83: Present & Forecasted FTAs from Japan



The above data in tabular format is as presented below.

Table 30: Present & Forecasted FTAs from Japan to India

Years	Optimistic Approach	Most Likely Approach	Pessimistic Approach
2006	119292	119292	119292
2007	145538	145538	145538
2008	150732	150732	150732
2009	124756	124756	124756
2010	168019	168019	168019
2011	193525	193525	193525
2012	220015	220015	220015
2013	220283	220283	220283
2014	219516	219516	219516
2015	207415	207415	207415
2016*	224008	220482	215712
2017*	241929	234373	224340
2018*	261283	249138	233314
2019*	282186	264834	242646
2020*	304761	281518	252352
2021*	329142	299254	262446

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 Japan 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 Japanese cities of Tokyo and Osaka. 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 Japanese are very aware of India and they perceive India as a beautiful place of culture and heritage. The top of the mind impression of India for Japanese is Taj Mahal, Jaipur, Varanasi and Buddha Circuit. For the Japanese Indian Food and Bollywood 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 Japanese travellers are the facet of dismal law and order situation, crowdedness, poverty & begging, pollution and communication with locals. This fear is enhanced by the fact that knowledge about the developments in India is not present amongst many travellers since communication about the new and developing India is not present amongst the mainstream media. The fear about India is escalated by the difficulty of getting Indian Visa and the hurdles like language barrier, absence of interpreter and Japanese guides in India, no local language guidance for filling out visa forms, lengthy visa form, etc.

The travellers interviewed mentioned that they preferred to book on their own when travelling but in case of India, they are more comfortable booking through a tour operator as they are not sure about India, so prefer an agent who has experienced India, can tell them about India. Food, though an issue with many western travellers to India, for Japanese travellers food is not an issue and most of them love the different taste that Spicy/masala food brings.

The maximum time Japanese can spend for holidays are 5 to 7 days at a stretch young generation. So the prominent destinations for vacation with family and friends are mainly Taiwan, Hawaii, and Malaysia. Some who can spare 8 to 11 days generally prefer to go Spain, Italy, and Bali, Finland. In case of India first time travellers like to visit Taj Mahal and golden triangle and Varanasi. Second time visitors usually visit Ajanta/ Ellora, Mumbai and Gujarat. Kerala back waters and Ayurveda is also picking up as a preferred destination for Japanese tourists. Majority of the travellers to India are 65 years plus. And 60% of them are keen for visiting the Buddhist circuit on a package for 10 to 11 days wherein the route is Delhi- Patna- Bodhgaya- Rajgir- Sarnath- Khushinagar- Lumbini- Balrampur –Lucknow –Delhi. The average budget which they spend for a long destination trip is app 2, 00,000 yen per person which includes air travel.

Bollywood and TV shows/ Documentary are the most influencing medium which impact the Japanese with regards to raising interest about travel destinations. Most of the houses do not have satellite TV. The Japanese prefer TV shows – 6 primary channels on non-satellite TV. Promotion in the form of documentary on Travel channel in Japanese or a Bollywood show shall make an impact. This needs to be repeated frequently with different themes/destinations so as to raise interest and remove the fear factor of India Tourism.

As per the trade, the tope destinations for Japanese are Italy, Cambodia, Vietnam, Austria, France, and South America. One tour operator quipped "*It's a rich, affluent and older market wherein most of the travellers are 60 years plus. They need luxury and comfort. They are very meticulous, systematic and need prior information well in advance for planning. The other class is OL (OFFICE LADY) who are single travellers in age group of 24 to 30 years, they want to know and have everything beforehand*".

As regards India, the majority of the Japanese tourist traffic is either for Buddhist Circuit or Golden Triangle – more importantly Taj Mahal and Varanasi. The major issue is the internal travel in case of various locations across the Buddhist circuit destinations, as the mode of travel is road and it becomes too tiresome since it takes 6 to 7 hours to cover a distance of 200 kms. The other important aspect is lack of public convenience along the route. As per the Government of Japan rule there has to be a Toilet break for any travel beyond 2 hours in a bus. The other major issue in case of Buddhist circuit which is the major destination for Japanese travellers are lack of good hygienic hotels in Sarnath, Kushinagar and Bodhgaya.

The other major issue that travellers face is obtaining Visa for India and also size of the photo required for visa is not mentioned. The visa process is complicated and lengthy as per travellers. Moreover the visa form is in English and for Japanese travellers not conversant in English; it is very difficult to fill it up. The visa providing facility for Japanese travellers has been handed over to third party firm which consists of Philippine staff and a Sri Lankan owner with no Japanese speaking member in the staff. Hence communication regarding visa gets very problematic for the travellers who mostly want prior visa rather than visa on arrival which is present for Japanese travellers. Also the visa amount is extremely high as per Japanese travellers and getting a visa proves to be a hassle and also is a big factor in discouraging Japanese travellers from visiting India. The Visa rules keep on changing as per travellers and trade and is not communicated is a proper and timely manner.

Roadmap to Improve Promotional Activities:

- The visa application forms should be provided in local language. Also the India Tourism Website should have an option of local language
- The India Tourism Office in Tokyo should have Japanese speaking staff who can properly guide Japanese travellers not conversant with English
- The third party firm providing visa facilities in Japan should include Japanese staff fluent in the local language for effectively guiding the travellers intending to visit India with a visa beforehand
- The India Tourism Office in Tokyo should include a helpdesk for visa enquiries. This will greatly increase the comfort and hassle free guidance to travellers as well as trade for any enquiries regarding visa to India and the rules and regulations

- More guides in India should be trained and certified and they should be very fluent in the Japanese language. A list of certified guides at each Indian city can be provided in the website and also in the India Tourism Office Tokyo brochures. This will help in easing the fear of Japanese travellers with regards to communication problem in India
- Travellers are aware about India and also about the promotional /publicity material available at various forums but, these are not helping the travellers to plan their travel. The information provided needs to be more comprehensive and clear. Travellers feel the need of a travel itinerary.
- All the required information is available on the website of Incredible India, but the website needs to be more focussed, product driven and clear so that travellers can decide their destination and can compare India vis-à-vis other competitive countries. The Campaign should be focused more to lure the intending travellers to “Visit India” rather than simply describing India.
- Travellers only aware of Golden Triangle, Buddhist circuit, Taj Mahal, Kerala & Varanasi. 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 involvement of JATA and Indian tour operators are facilitated by the India Tourism Office in Tokyo 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 participate in important fairs and festivals where they can sponsor any event which will finally send a message to "*Visit India"* and not just educate travellers about India. More 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 local language. Also the Local channels in Japan, which are most watched by the potential travellers are not showing India Tourism advertisements. Indian tourism advertisements are currently airing on satellite channels which are not watched by regular Japanese travellers. 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. As the Japanese are very much attracted and interested in Bollywood and India's spices and different varieties of food, media can also take the help of Bollywood celebrities and famous personalities to promote India.

Traveller:

More efforts need to be put in creating promotional campaigns which will increase footfalls of travellers to India. In order to attract intending travellers as well as past travellers (for repeat visit) - a comprehensive plan with lots of stimulus is essential. Thus it is imperative to categorise the travellers from any particular country on the basis of their travel pattern and habit/ behaviour. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website. 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 non-satellite channels and popular print media
- India tourism website in the local language
- Inclusion of Japanese speaking staff in the India Tourism Office in Tokyo and also in the third party visa providing firm
- A visa helpdesk in the India Tourism Office in Tokyo
- Feature Incredible India advertisements on social media.
- A social media campaign of India Tourism highlighting the most liked aspects of tourism in the Japanese context.
- Organize Bollywood nights and food festivals regularly so as to pique interest of Japanese travellers about India.
- Training and providing certified Japanese 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.
- Though enough publicity material is there, but it is all out-dated, there is no mention about New India – new destinations, new products, new packages, new circuits and new luxury properties need to be promoted alongside well known destinations, so as to offer a large choice in front of prospective travellers.
- 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 Newspaper__________ Consumer Fairs & Exhibitions	7 8 9
Posters/Billboards/Movies__________ __________ __________	2	Previous Visit	10
Magazines/Books__________ __________	3	It is the country where I have my roots	11
Customer Information Services	4	Any other__________	12
Trade Events	5		
Websites/Internet__________ __________ __________	6		

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

Yes	1	No	2

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

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

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

    ____

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

    ____

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

Yes	1	No	2

21. Please answer

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

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

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

Staying with Friends / Family in their House	05
Others_______________________________________	06

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

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

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

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

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

Payment Mode	Rank
Cash	
Cheque	
Online	
Credit Card	
Debit Card	

26. Would you like to re – visit India

Yes	1	No	2

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

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

b) If No, what are the reasons?

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

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

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

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

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

30. What was your mode of booking?

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

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

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

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

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

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

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

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

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

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

35. What is the average monthly household expenditure?

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

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

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

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

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

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

2. What was the reason for traveling abroad?

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

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

Country	Time of the year	Yes/ No	Duration

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

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

5. How was your trip?

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

6. What was your expenditure?

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

7. Was it value for money?

Yes	1	No	2

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

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

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

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

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

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

11. What was your mode of booking?

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

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

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

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

Yes	1	No	2

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

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

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

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

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

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

Tour Operator		**Rank**
Package Options	01	

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

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

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

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

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

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

Yes	1	No	2

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

Yes	1	No	2

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

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

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

Self	1	Travel operator	2

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

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

24. What is the reason behind this decision?

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

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

25. Would you like to visit India ever?

Yes	1	No	2

THANK RESPONDENT

INTENDING TRAVELLER SURVEY

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

GENDER OF THE RESPONDENT: **(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!