


Study on Tourism in Overseas Market of South Africa

Final Report – South Africa

For

Market Research Division
Ministry of Tourism
Government of India

सत्यमेव जयते
Government of India



nielsen

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Executive Summary

E1. The foreign tourist arrival growth in India is little more than 10% per annum (2014) & in terms of figures of FTA – Foreign tourist arrival, India received around 7.68 million foreign tourists in 2014. Though the share of FTAs from South Africa to India is moderate (56,246 FTAs from South Africa to India in 2014) owing to the historical relationship between the two countries, a vast opportunity lies untapped in the form of outbound travellers in the South Africa 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 Johannesburg.

India has for long been known for its rich culture and heritage beautiful and artistic historical monuments, cuisine with traditional Indian spices and herbs, pocket friendly rates, breath-taking natural beauty and a wide range of tropical beaches. Given the fact that India is one of the commonwealth nations and South Africa being another member of the Commonwealth, awareness among South Africa nationals about India and it tourist destinations is very high.

E4. For holidaymakers from South Africa, India is a long haul destination. On virtue of having friends and relatives in India, they have visited India in past and have seen the destinations that are promoted frequently. South Africa past travellers to India on a package tour has spent around INR 2.8 lakh per person on an average while past travellers to India on a non-package tour has spent around INR 2.5 lakh per person on an average . Most of the past travellers visited India to see and experience the heritage and culture of the country. The most fascinating things to them were to enjoy the rich heritage, cultural diversity, scenic beauty & religious places in India.

E5. All the past travellers are aware about India through websites / internet and magazines/ books on travel, but the promotional /publicity material available at various forums are not helping to plan their travel as their requirement of minute details are often not addressed. India as a destination is known to the travellers in South Africa due to the cultural connect it shares because of colonial past and also due to Mahatma Gandhi’s 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, product driven and clear so that travellers can decide their destination and can compare the benefit to visit India vis-à-vis other competitive countries. The Campaign should be focused more to lure the intending travellers to “Visit India “rather than simply describing India.

E6. The ethnic difference that exists in South Africa also converts to choices and Travellers are only aware of Golden Triangle, therefore, more destination specific visuals/ campaigns defining the products and its unique features need to be devised and promoted. Rather than marketing India or just one state to the trade, focus should be on marketing a product /activity/ event. Under the umbrella of brand India new tourist circuits need to be created to attract different type of travellers. Thus there is need to focus separately for the 3 different stakeholders;

E7. Trade/ Tour Operator:

Focussing on trade and forming a symbiotic relationship with trade will foster a greater number of foreign tourist visits to India. It is also suggested to improve the number of tour operators who sell India by providing free training and tutorials for tourism in India by Ministry and motivate them to work for 'India Tourism Office'. There is a need for an integrated approach by India Tourism Office and tour operators. India Tourism Office must participate in important fairs and festivals where they can sponsor any event which will finally send a message to "*Visit India"* and not just educate travellers about India. They are interested more in fun, beaches and not in heritage or culture. Based on this the travel package need to be designed especially for them. The Whites are more interested in heritage, luxury, history. More communication with tour operators is required with regards to events that can be organized to boost tourism to India.

E8. Media:

Media is a medium that can be used to make people aware about India. Media reaches the masses and hence is a very important tool of promotion. Currently the advertisements of Incredible India campaign are currently shown in channels that are international and the same for the entire African Subcontinent. Local channels in South Africa, which are most watched by the potential travellers are not showing India Tourism advertisements. The same is happening in case of print advertisements too. The media advertisements need to focus on the various products that India has to offer assuring that India is a safe and secure country to visit and can also showcase the unique blend of modern and traditional experiences that India has to offer. Media can also take the help of celebrities and famous personalities to promote the pleasant experiences that they had encountered during their stay in India.

E9. Traveller:

More efforts need to be put in creating promotional campaigns which will increase footfalls of travellers to India. In order to attract intending travellers as well as past travellers (for repeat visit) - a comprehensive travel guide or plan with lots of stimulus is essential. Thus it is imperative to categorise the travellers from any particular country on the basis of their travel pattern and habit/ behaviour. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website.

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

Short Term Measures:

- Feature Incredible India advertisements in popular local channels and mainstream popular print media and more importantly on social media.
- A social media campaign of India Tourism highlighting the most liked aspects of tourism in the South African context.
- Organize focused Familiarization tours for media persons and tour operators.
- Impart training to front office executives who are in direct contact with prospective travellers so as they can handle all types of queries.
- Though enough publicity material is there, but it is all out-dated, there is no mention about New India – new destinations, new products, new packages, new circuits and new luxury properties need to be promoted alongside well known destinations, so as to offer a large choice in front of prospective travellers.
- 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

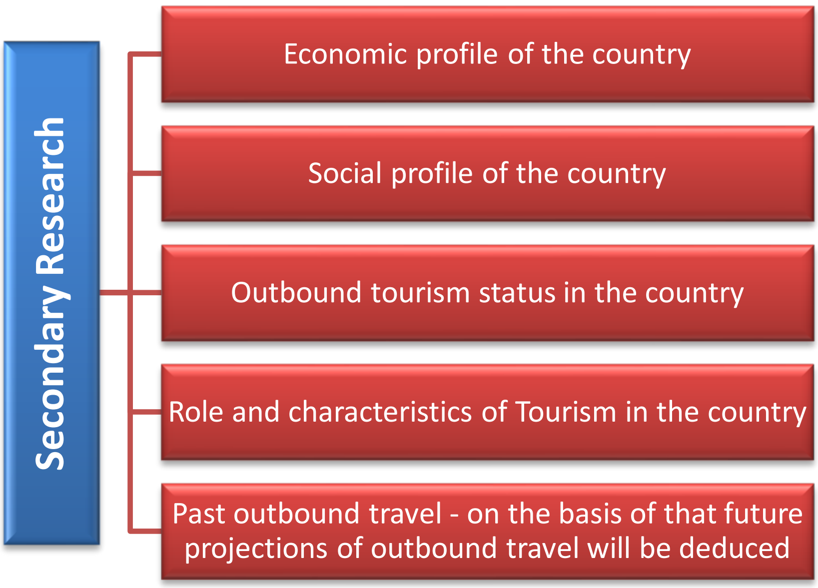
To conduct a study on tourism in the overseas markets of Germany, Japan, Russia, South Africa, South Korea and Turkey. The study will include a primary survey of past and prospective travellers besides compilation and analysis of information from secondary sources. Based on the secondary research and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

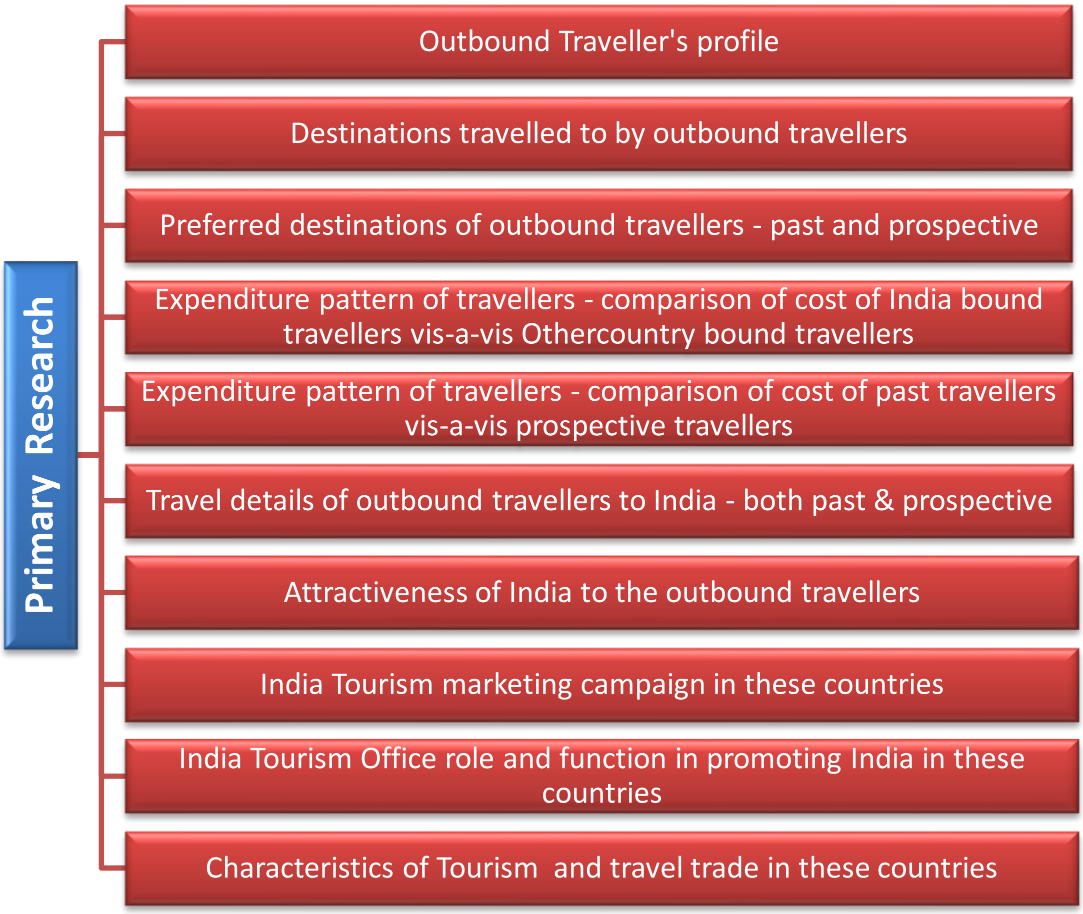
- Projections of future outbound travel
- Role and characteristics of tourism and travel trade in these countries
- Attractiveness of India for visitors from these countries
- India tourism marketing and promotion in these countries
- Suggestion of specific measures to promote India tourism in these 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 2000 by the Market Research Division, Ministry of Tourism.

Table 2: Sample Size Distribution

Country	Category of Respondents				Total
	Persons who Travelled Abroad in last One Year		Persons who have not gone abroad yet but intend to travel in near future		
	To India	To Other Countries	To India	To Other Countries	
South Africa	600	600	200	600	2000

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

Additionally, Nielsen executives from New Delhi office interviewed 25 outbound Tour Operators and travel agents from, South Africa. 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 South Africa.

1.5 Coverage

Segments

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

- 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 Johannesburg

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

Table 3: Sample and Geographical Coverage

Country	Location	No. of Respondents	Sources Of Respondents	Hit Rate

South Africa 	Cape Town	600	1. Our Local office in Johannesburg 2. Local directory (1940) 3. Local tour operators (1060)	Nielsen contacted 3700 respondents to achieve 2000 interviews
	Johannesburg	700		
	Durban	700		
	Total	**2000**		

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

1.6 Method of Inquiry

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

- **For inhabitants of South 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 – South Africa

2.1.1 Introduction

Dutch traders landed at the southern tip of modern day South Africa in 1652 and established a stopover point on the spice route between the Netherlands and the Far East, founding the city of Cape Town. After the British seized the Cape of Good Hope area in 1806, many of the Dutch settlers (Afrikaners, called "Boers" (farmers) by the British) trekked north to found their own republics in lands taken from the indigenous black inhabitants.

South Africa, officially known as the Republic of South Africa, is the southernmost sovereign state in the African continent. It is bounded on the south by 2,798 kilometres of coastline of Southern Africa stretching along the South Atlantic and Indian Oceans, on the north by the neighbouring countries of Namibia, Botswana and Zimbabwe, and on the east by Mozambique and Swaziland, and surrounding the kingdom of Lesotho. South Africa is the 25th-largest country in the world by land area, and with close to 53 million people, is the world's 26th-most populous nation. It is the southernmost country on the mainland of the Old World or the Eastern Hemisphere.[1]

South Africa is often referred to as the "Rainbow Nation" to describe the country's newly developing multi-cultural diversity in the wake of segregationist apartheid ideology. South Africa is a multi-ethnic society encompassing a wide variety of cultures, languages, and religions. Its pluralistic makeup is reflected in the constitution's recognition of 11 official languages, which is among the highest number of any country in the world. Two of these languages are of European origin: Afrikaans developed from Dutch and serves as the first language of most white and coloured South Africans; English reflects the legacy of British colonialism, and is commonly used in public and commercial life, though it is fourth-ranked as a spoken first language.

[1] Source: CIA World Fact book

South Africa has three capital cities which are Pretoria (Executive Capital), Bloemfontein (Judicial Capital) and Cape Town (Legislative Capital). Johannesburg is the largest city of the country of South Africa.

2.1.2 Social Profile

South Africa comprises of a rich history in terms of social upheavals and reforms, the most popularly known social change being the anti-apartheid struggle and Nelson Mandela's leadership during the same.

During the 20th century, the black majority sought to recover its rights from the dominant white minority, with this struggle playing a large role in the country's recent history and politics. The National Party imposed apartheid in 1948, institutionalizing previous racial segregation. After a long and violent struggle by the African National Congress and other anti-apartheid activists, both inside and outside the country, discriminatory laws began to be repealed or abolished from 1990 onwards.

About 80 percent of South Africans are of Sub-Saharan African ancestry, divided among a variety of ethnic groups speaking different Bantu languages, nine of which have official status. The remaining population consists of Africa's largest communities of European (white), Asian (Indian), and multiracial (coloured) ancestry. Since 1994, all ethnic and linguistic groups have had political representation in the country's democracy, which comprises a parliamentary republic and nine provinces.

2.1.3 Urban/ Rural Population

South Africa is a majorly urbanized population with 64.8% of the total population (2015) living in urban areas. Major urban areas, with respect to population, are Johannesburg, Cape Town, Durban, Pretoria, Port Elizabeth and Vereeniging (2015). [2]

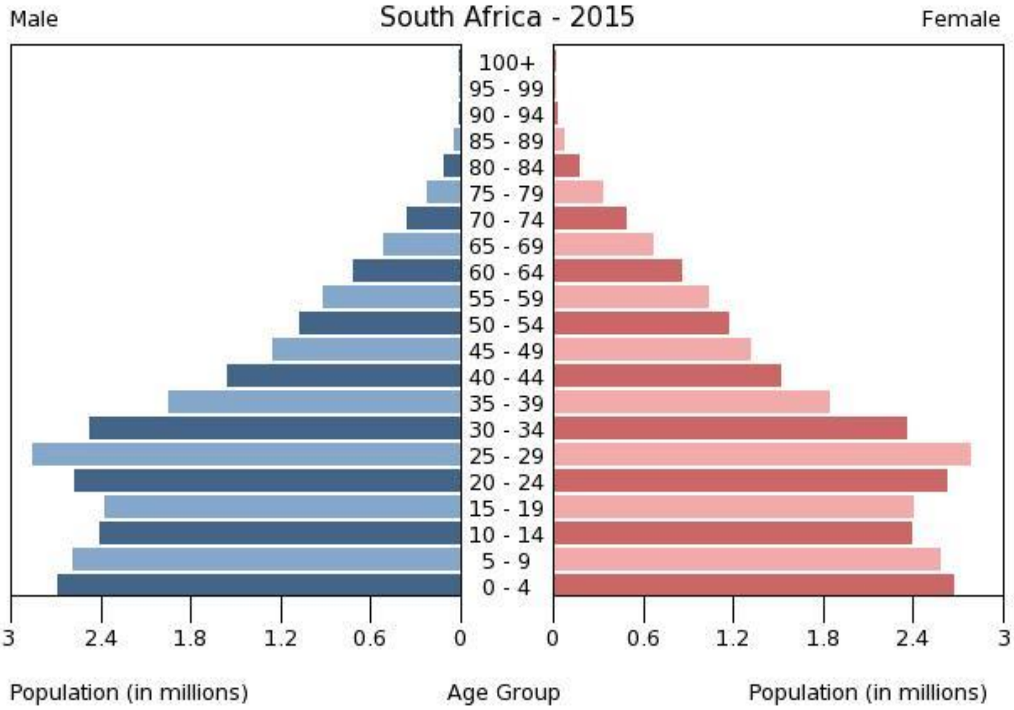
2.1.4 Gender Statistics

[2] Source: CIA World Factbook.

According to the Census 2011 data from Statistics South Africa, in 2011 the country's population was 51 770 560, of which 26 581 769 (51.3%) were female and 25 188 791 (48.7%) were male.[3]

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

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



2.1.5 Prominent Religious Groups

As per the 2001 Census of South Africa, Protestants form 36.6% (Zionist Christian 11.1%, Pentecostal/Charismatic 8.2%, Methodist 6.8%, Dutch Reformed 6.7%, Anglican 3.8%) of the total South African population. Catholics constitute 7.1%, Muslim constitute 1.5%, other Christian constitute 36%, other religions constitute 2.3%, people with unspecified religion constitute 1.4% and people with no religion constitute 15.1% of the total South African population. [5]

2.1.6 Age Distribution

[3] http://www.southafrica.info/about/people/population.htm#.VubQyPl97IU
[4] CIA World Factbook
[5] Source: CIA World Factbook

The age distribution of the population of South Africa 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	28.43%	7,660,173	7,598,013
2	15-24 years	18.52%	4,937,169	5,002,201
3	25-54 years	41.07%	11,120,423	10,923,422
4	55-64 years	6.53%	1,628,183	1,874,946
5	65 years and over	5.46%	1,231,627	1,699,406[6]

2.1.7 Literacy

Literacy level in the country of South Africa is defined as people who can read and write above the age of 15. The total percentage of literates in South Africa is 94.3% of the total population. The literacy levels amongst male population are 95.5% and the literacy level amongst the female population is 93.1% of the total population. The data is as per estimates from 2015.[7]

2.1.8 Economic Profile

South Africa is ranked as a middle income economy with emerging markets and an abundant supply of natural resources. South Africa is considered to be a newly industrialised country. Its economy is the second-largest in the African continent and the 34th-largest in the world. In terms of purchasing power parity, South Africa has the seventh-highest per capita income in Africa. However, poverty and inequality remain widespread, with about a quarter of the population unemployed and living on less than US$1.25 a day. Nevertheless, South Africa has been identified as a middle power in international affairs, and maintains significant regional influence.

Official unemployment is roughly 25% of the work force, and runs significantly higher among black youth. Even though the country's modern infrastructure

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

supports a relatively efficient distribution of goods to major urban centres throughout the region, unstable electricity supplies retard growth.[8]

2.1.9 Gross Domestic Product (GDP)

South Africa's GDP in 2015 (estimate) was US$ 724 Billion. South Africa ranks 31st in terms of country ranking in the world for GDP. The GDP growth rate for South Africa (2015 estimate) is 1.4%. The PPP of South Africa stands at US$ 13,400 (2015 estimate).[9]

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

Year (est.)	USD
2015	US$ 724 Billion
2014	US$ 714 Billion
2013	US$ 703.3 Billion
Source: https://www.cia.gov	

2.1.10 Per Capita Income/ Spending Power

South Africa ranks 117th in the world with regards to purchasing power parity. The rate of inflation in the year 2015 (estimate) was 4.8%.

Table 6: South Africa GDP (purchasing power parity)

Year (est.)	USD GDP Per capita (PPP)
2015	USD 13,400
2014	USD 13,200
2013	USD 13,000
Source: https://www.cia.gov	

2.2 Tourism Overview

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

2.2.1 General Statistics

South Africa is highly diverse in terms of its geography, climate, culture, tourist activities and infrastructure, catering for every tourism niche, from business, eco- and cultural tourism through to adventure, sport and paleo-tourism. This diversity the country offers, along with South Africa's scenic beauty and reputation for delivering value for money has made it one of the world's fastest growing leisure and business travel destinations in the world.

The regional African tourist market is South Africa's important tourist markets, contributing more than 73% of total tourist arrivals and more than R50-billion in revenue in 2011.

Domestic tourism is also an important source of revenue and employment, contributing 52% of total tourism consumption.[10]

2.2.2 Inbound Travel

South Africa's spectacular scenery, friendly people, world-class infrastructure make it one of the most desired destinations in the world. The sector was given a massive boost by the successful hosting of the World Cup in 2010, when the country received a record-breaking 8.1-million foreign visitors. Despite tough global economic conditions, tourism grew in 2011, with 8.3-million international tourists.[11]

Figure 2: Foreign Tourism Indicators

[10] Source: http://www.southafrica.info/business/economy/sectors/tourism-overview

[11] Source: http://www.southafrica.info/business/economy/sectors/tourism-overview.htm#.Vu-l0eJ97IU

Foreign Tourism Indicators

All Markets	Leisure	Business Travel	Business Tourism	Other	All Tourist Arrivals
Total Volume (2009) (Millions)	4.2	1.7	0.3	0.8	7.0
Total Volume (2010) (Millions)	4.7	2.1	0.4	0.9	8.1
Volume Growth (09-10 % change)	12.7%	18.3%	9.9%	25.4%	15.1%
Average Length of Stay (2009) (Nights)	8.6	5.5	5.2	14.7	8.3
Average Length of Stay (2010) (Nights)	8.4	5.7	4.9	16.4	8.5
Average Number of Provinces Visited (2009)	1.3	1.1	1.2	1.1	1.3
Average Number of Provinces Visited (2010)	1.4	1.1	1.2	1.1	1.3

"Leisure" includes General Holiday, VFR, and Personal Shopping; "Business Travel" includes Business professional and Business shopping; "Business Tourism" includes Business meetings, conferences and events; "Other" includes Health purposes, education, religious purposes, etc.
Source: SAT Departure Surveys, 2009 and 2010

[12]

The latest data from Statistics South Africa (StatsSA) indicates that the total number of foreign travellers who visited South Africa from Africa, overseas and unspecified countries, arriving through all ports of entry during 2014 was 15 092 016. The 2014 figure represents a decrease of 0.4% as compared with the 2013 figure of 15 154 991. During 2014, 5 311 625 arrivals were recorded for South African residents while the total number of those departing was 5 382 139 and South African residence in transit were 8 178. In 2014, a total of 14 529 542 visitors came to South Africa, of which 4 980 306 are same day visitors and 9 549 236 are tourists (overnight visitors).The breakdown of tourists by sex and age is as follows: 4 929 719 were males and 3 867 682 were females; 553 881 were less than 15 years, 8 554 931 were aged 15-64, 440 100 were aged 65+ and 324 tourists did not specify their age. [13]

Table 7: Foreign Tourist Arrivals (in thousands)

Year	Foreign Tourist Arrivals (in thousands)[14]
2008	9 729

[12] Source: http://www.southafrica.net/research/en/landing/research-home

[13] Source: Statistics South Africa

[14] Source: Statistics South Africa Report

2009	10 098
2010	11 575
2011	12 496
2012	13 796
2013	15 155
2014	15 092

2.2.3 Seasonality of Tourism in the South Africa

Inbound visits to South Africa are most popular during the winter months in the northern hemisphere, whereas the summer months in the southern hemisphere and hence in South Africa. But the best season to visit the national parks and safaris is the dry season in South Africa that starts from May and ends in September.

2.2.4 Outbound South Africa Travellers

International tourism; number of departures in South Africa was last measured at 5168000 in 2013, according to the World Bank.

Table 8: Departure (in thousands)

Year	Departures (in thousands)[15]
2008	4429
2009	4424
2010	5165
2011	5455
2012	5031
2013	5168

2.2.5 Preferred Outbound Destinations

Travelling abroad is largely undertaken by affluent South Africans, especially to long-haul destinations, while those on lower incomes are more likely to travel domestically in South Africa or to nearby African countries.

[15] Source: World Travel Organization

Approximately one in ten South Africans travel abroad each year, although holiday and leisure travel is only one part of the market. Visiting friends and relatives (VFR) and business travel are both important components of the South African outbound market.

Preferred destinations for South Africans are Europe, Uk, Germany, and Turkey amongst European countries. Preferred destinations of South Africans amongst the long haul destinations are USA, Thailand, Hong Kong, Australia and Singapore. Amongst the nations in the African continent, the preferred destination of South Africans are Zimbabwe, Lesotho, Swaziland, Mozambique, Botswana, Namibia, Mauritius and Zambia.

2.2.6 Domestic Tourism in South Africa

According to newly released SA Tourism data (May 2015), the total number of domestic trips increased by 11% in 2014 to reach 28 million trips compared to the 25.2 million trips taken in 2013. Approximately 12 million South African adults took a domestic trip in 2014, the same number of travellers we had in 2013. However, the average number of trips taken per traveller increased from 2.1 in 2013 to 2.3 in 2014.[16]

A few indicators of domestic tourism in South Africa is presented in the figure below.

Figure 3: Domestic Tourism Indicators

[16] Source: SA Tourism Ministerial Review Report

Domestic Tourism Indicators

Key Metrics		2007	2008	2009	2010
Domestic Travel Incidence	Annual	43.5%	46.5%	47.6%	43.0%
	Monthly[1]	9.9%	9.0%	8.2%	7.9%
Number of Trips	Annual	35.9 Million	32.9 Million	30.3 Million	29.7 Million
	By Purpose	VFR: 68%, Holiday: 16%, Business: 7%, Religious: 7%, Medical: 1%	VFR: 71%, Holiday: 16%, Business: 5%, Religious: 5%, Medical: 2%	VFR: 76%, Holiday: 12%, Business: 5%, Religious: 5%, Medical: 1%	VFR: 74%, Holiday: 13%, Business: 5%, Religious: 6%, Medical: 1%
Spend	Total Annual Spend	R20.0 Billion	R25.8 Billion	R22.4 Billion	R21.1 Billion
	By Purpose	VFR: 45%, Holiday: 37%, Business: 14%, Religious: 3%, Medical: 0%	VFR: 45%, Holiday: 39%, Business: 12%, Religious: 3%, Medical: 2%	VFR: 59%, Holiday: 22%, Business: 17%, Religious: 2%, Medical: 1%	VFR: 51%, Holiday: 31%, Business: 14%, Religious: 3%, Medical: 0%
	Average Spend per Trip / per Day	R550 / Trip; R120 / Day	R780 / Trip; R170 / Day	R730 / Trip; R170 / Day	R710 / Trip; R160 / Day
Trip Length	Total Annual Bed Nights	157.8 Million	149.0 Million	128.4 Million	130.8 Million
	Average Nights per Trip	4.4	4.5	4.2	4.4

[17]

2.3 Travel & Trade

2.3.1 Introduction

With a population of approximately 41 million and a land area of 1.27 million sq. km (nearly five times the size of the UK). South Africa's resource base for tourism is phenomenal. The country's tourism attractiveness lies in its diversity. Some of the features which make South Africa an incredibly attractive tourism proposition include: accessible wildlife, varied and impressive scenery, unspoiled wilderness areas, diverse cultures (in particular traditional and township African cultures), generally sunny and hot climate, a well-developed infrastructure and virtually unlimited opportunities for special interest activities such as whale-watching, wild water rafting, hiking, bird-watching, bush survival, deep-sea fishing, hunting and diving. The inflow of tourists to South Africa is the result of the success of policies aimed at entrenching South Africa's status as a

[17] Source: http://www.southafrica.net/

major international tourism and business events destination. Tourism supports one in every 12 jobs in South Africa.

Given the strong growth potential in Africa, South Africa Tourism (SAT) was allocated R300 million to expand its marketing presence on the continent, which will include the opening of another four offices in the next few years. Also, the Tourism Business Council of South Africa is the umbrella organisation representing organised business in the South African travel and tourism industry.

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

South Africa has earmarked tourism as a key sector with excellent potential for growth: the government aims to increase tourism's contribution, both direct and indirectly, to the economy. Tourism is a national priority and contributes significantly to economic development. The national tourism sector strategy provides a blueprint for the sector to meet the growth targets contained in the new growth path.

The tourism industry continues to play an important role in the South African economy. The latest Tourism Satellite Account for South Africa report provides an overview of tourism's contribution in terms of spending, employment and its impact on the gross domestic product (GDP).

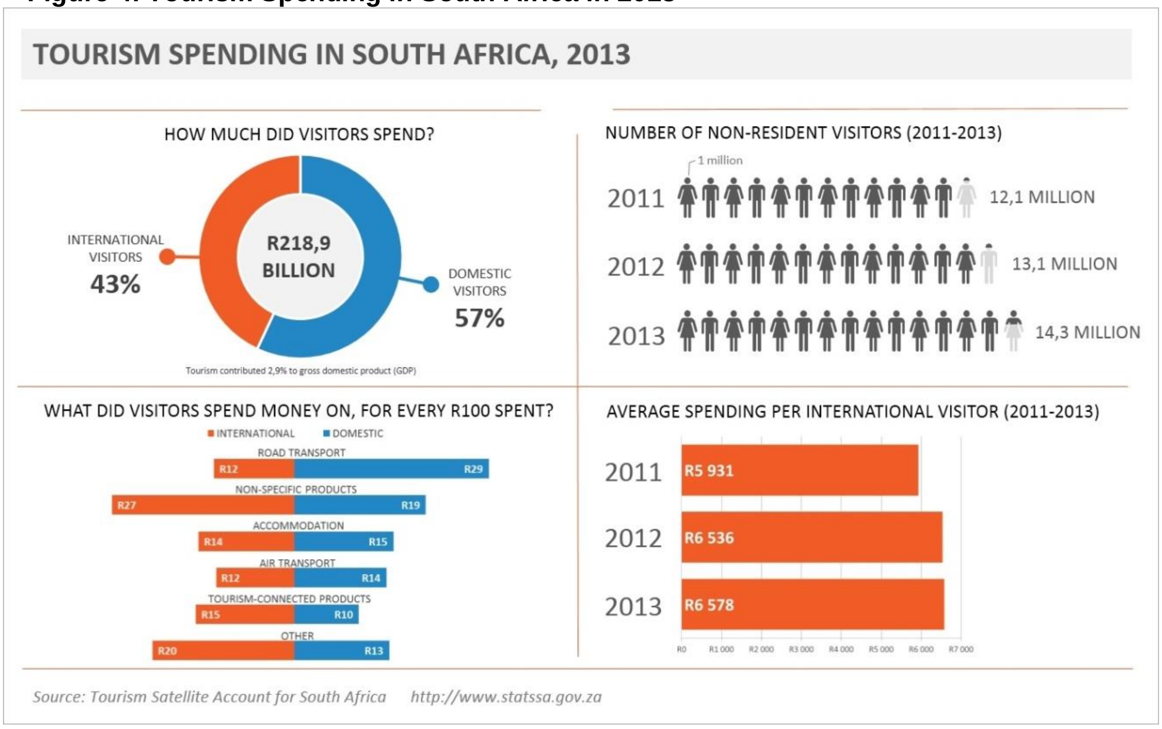
Tourism direct GDP was R103.6 billion in 2013, rising from R93.5 billion in 2012. The industry's contribution to total GDP remained stable at 2.9% for both years.

Domestic visitors contributed 57% (R124.7 billion) of total tourism spend in 2013, while international visitors contributed 43% (R94.2 billion). Total tourism spend in 2013 was R218.9 billion, a rise of 9.7% from R199,4 billion in 2012.

International and domestic visitors have different spending habits. For every R100 spent by an international visitor in 2013, R27 was spent on non-specific products, R15 on tourism-connected products, R14 on accommodation, R12 on road transport and R12 on air transport; and R20 was spent on other products. The major expenditure items for domestic visitors, for every R100 spent, were for road transport (R29), non-specific products (R19), accommodation (R15), air transport (R14), and tourism-connected products (R10). R13 was spent on other products.

During 2013, 14.3 million non-resident visitors visited South Africa, increasing from 13.1 million in 2012 and 12.1 million in 2011. Rising visitor numbers and increased spending is bound to influence employment within the industry. The number of persons employed in the tourism industry increased by 9854 from 645,755 persons in 2012 to 655,609 persons in 2013. The tourism industry employs about 4.4% of all employed persons in South Africa.[18]

Figure 4: Tourism Spending in South Africa in 2013



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

[18] Source: statssa.gov.za

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.

There are 10 international airports in South Africa, namely, Cape Town, Durban, Johannesburg (Lanseria airport and O.R. Tambo international airport), Mmabatho, Nelspruit, Polokwane and Sun City.

There are no direct flights between India and South Africa but there are regular flights connecting both the countries via transit points like Dubai.

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 to top India destinations from Johannesburg, as on March 22, 2016	
Johannesburg	
(Indian Rupees)	Lowest prices
Goa	38,900
Mumbai	28,140

Bangalore	38,392
Delhi	42,250
Hyderabad	39,085
Chennai	36,909
Kolkata	46,451
Chandigarh	59,770
Jaipur	45,139
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 Traveller Study Findings

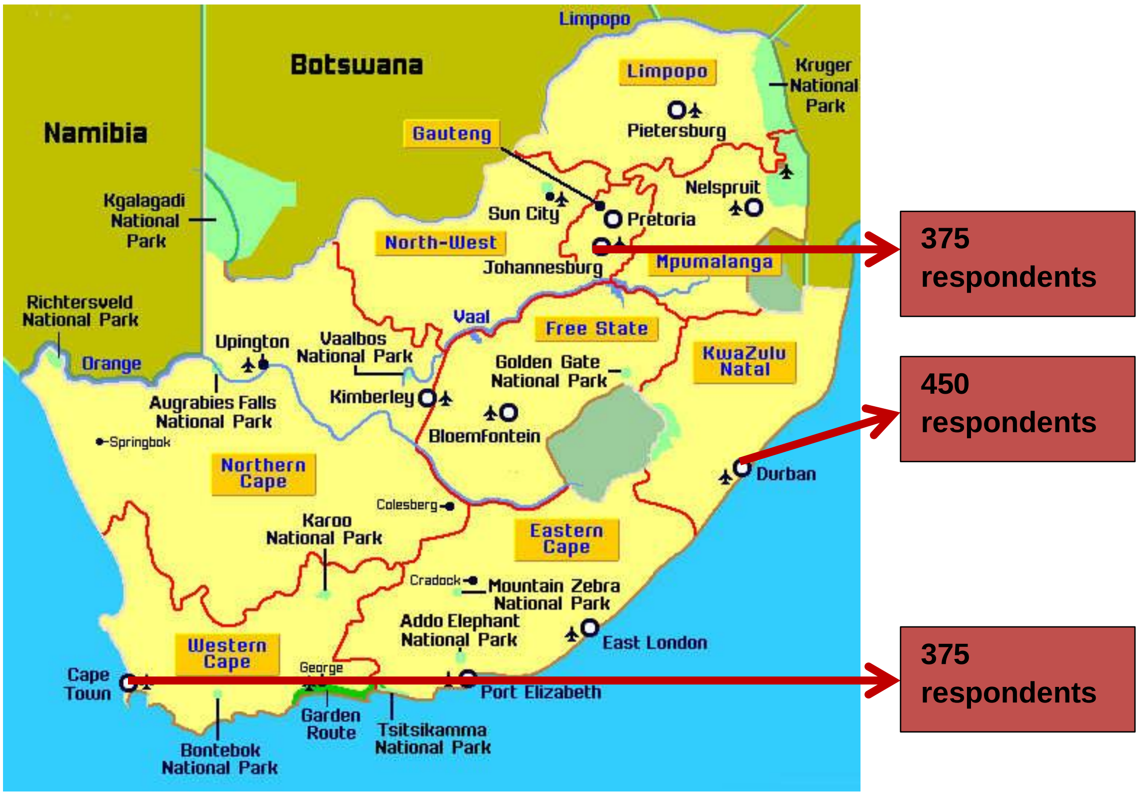
3.1 Past Outbound Travel Behaviour

3.1.1 Profiling Information

3.1.1.1 Place of Residence

The survey investigated 1200 respondents (persons who have travelled abroad in the last one year) from South Africa of which 37.5% of the travellers were from Durban and 31.25% each from Cape Town and Johannesburg.

Figure 5: Distribution of Past Travellers by Place of Residence



Map Source: www.south-africa-tours-and-travel.com

3.1.1.2 Age categories

52% of the respondents were in the age group of 36 to 50 years. 32% of the respondents, that is, 635 respondents were between 26 to 35 years of age.

Overall, 84% of the respondents were in their peak productive years between 26 and 50 years of age.

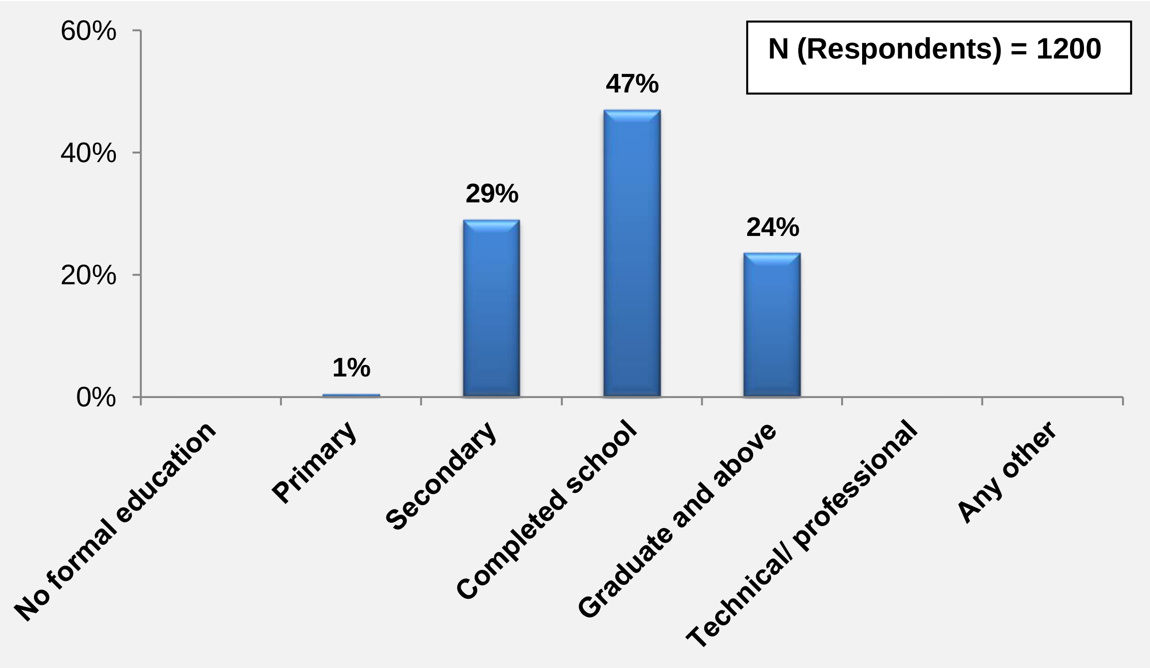
Table 11: Age Distribution

Age categories	No. of respondents	Percentage
Below 18 yrs	0	0.00%
18-25 yrs	345	28.75%
26-35 yrs	393	32.75%
36-50 yrs	333	27.75%
51-60 yrs	129	10.75%
Above 61 yrs	0	0.00%
Total	**1200**	**100.00%**

3.1.1.3 Educational Qualification of Respondents

47% respondents mentioned that they had completed school while 24% respondents out of the total 1200 past travellers to India and other countries mentioned that they had graduation degrees.

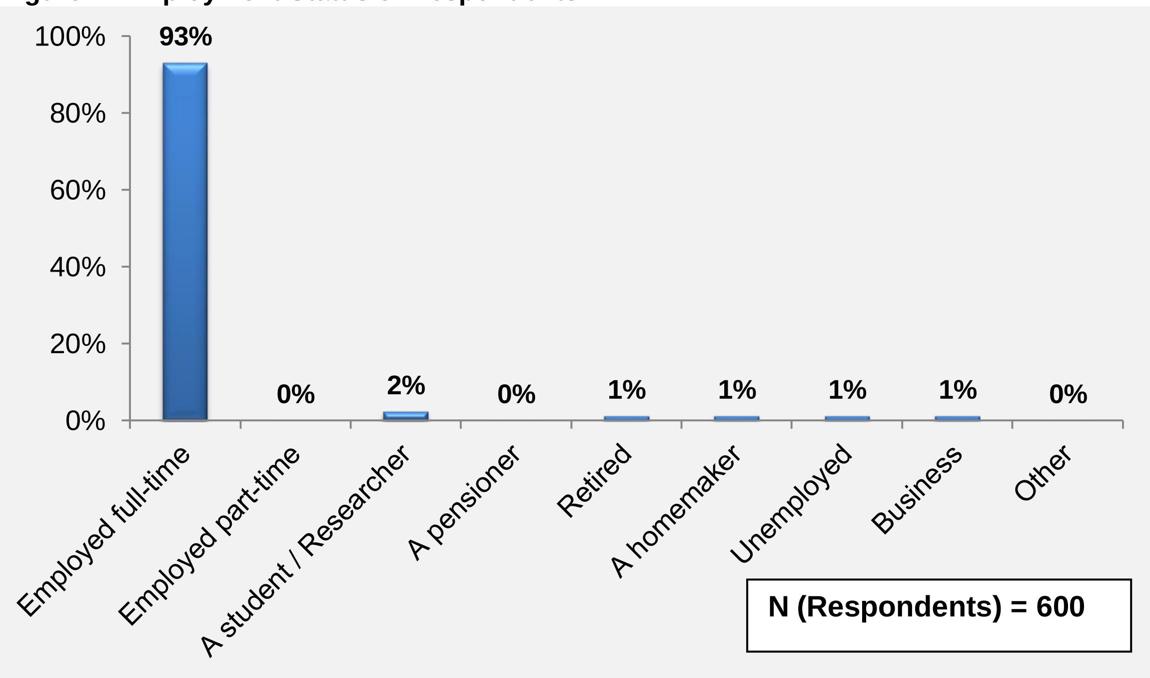
Figure 6: Educational Qualification of Respondents



3.1.1.4 Employment status of Past Travellers to India

47% respondents were employed full time. As many as 282 homemakers constituted 14% of the respondents. Other important segments were part time employees and business persons constituting 13% each. Retired persons and pensioners constitute another 10% of the respondents.

Figure 7: Employment Status of Respondents



3.1.1.5 Gender

Women constituted about 12.5% of the survey participants. Overall, 150 women (past travellers) were interviewed during the primary survey across the six cities.

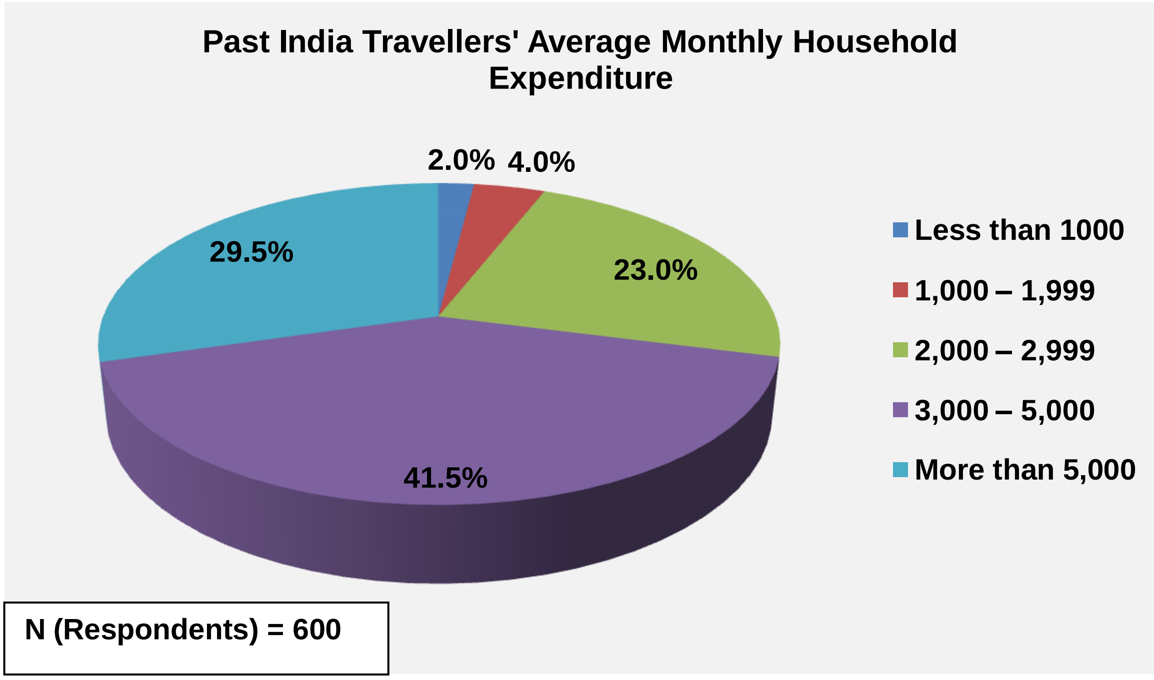
Table 12: Gender Distribution

Gender	No. of respondents	Percentage
Male	1050	87.50%
Female	150	12.50%
Total	**1200**	**100.00%**

3.1.1.6 By Average Monthly Household Expenditure of Past Travellers to India

41.5% 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 29.5%.

Figure 8: Categorizing Past India Respondents by monthly household expenditure in US$

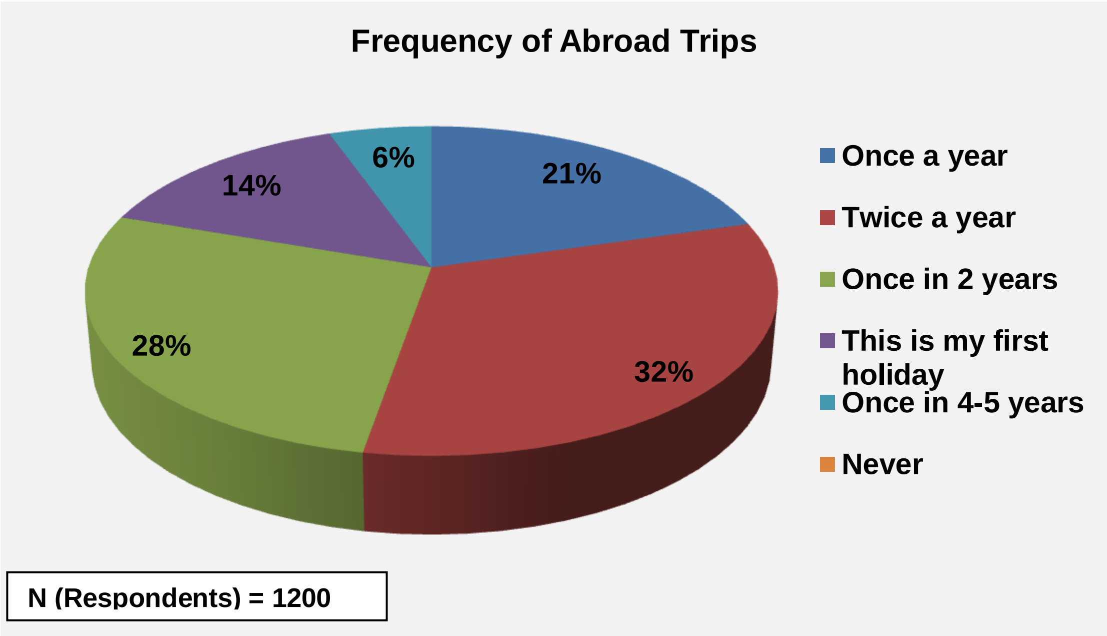


3.1.2 General Travel Behaviour

3.1.2.1 Frequency of trips abroad

Of the 1200 persons surveyed, 21% travel once a year. A substantive 32% travel several times in a year. 330 respondents travelled once in two years.

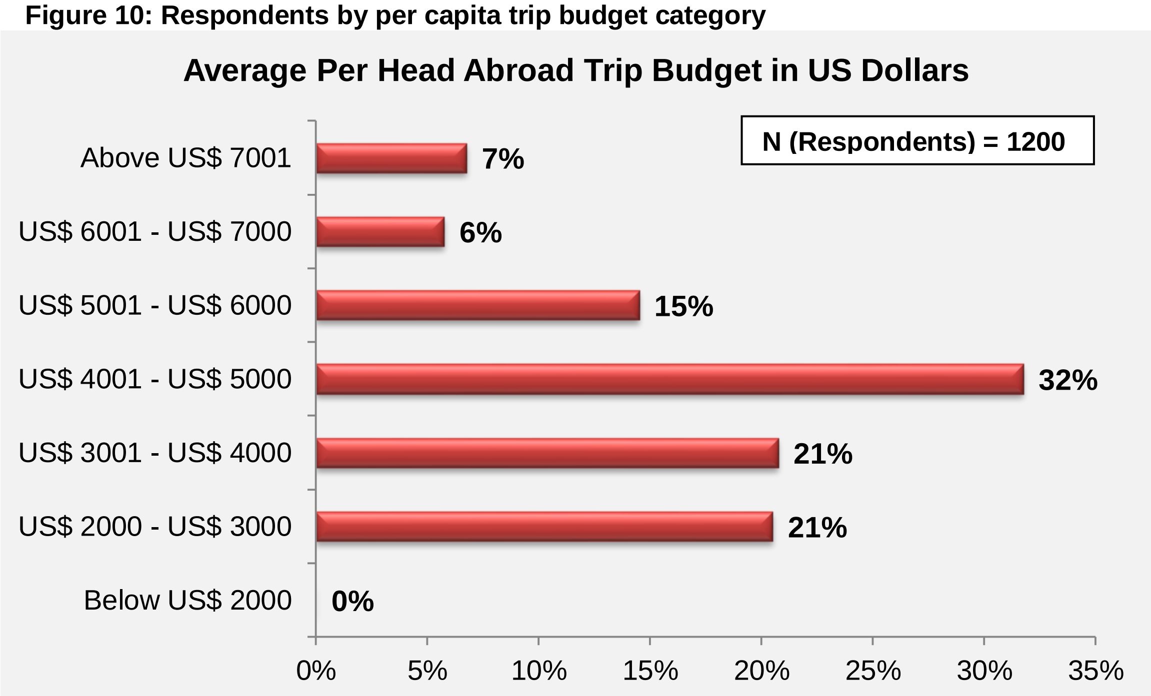
Figure 9: Respondents categorized by frequency of trips abroad



3.1.2.2 Average expenditure on trips

32% of the total 1200 travellers surveyed had a trip budget of US$ 4001 – US$ 5000 per head for a foreign trip. Another 21% budgeted in the range of US$ 3001– US$ 4000 per traveller. 7% of the respondents had an average budget of over US$ 7001 per head for an overseas trip.

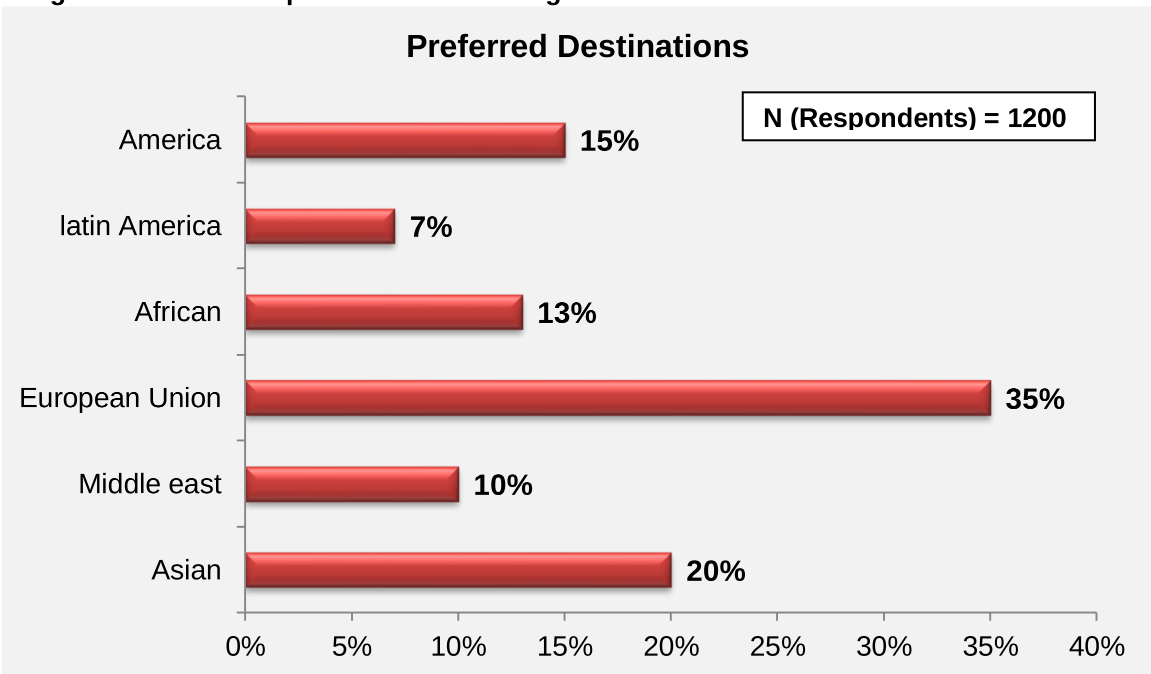
Figure 10: Respondents by per capita trip budget category



3.1.2.3 Preferred destinations

Respondents were asked to indicate their preferred foreign destinations for trips. In this analysis it was found that 20% of the responses were in favour of Asian destinations while another 35% responses showed in the inclination for EU. Of the 1200 responses received from 1200 respondents, 177 were in favour of countries in the North American continent while 13% respondents showed preference for African countries.

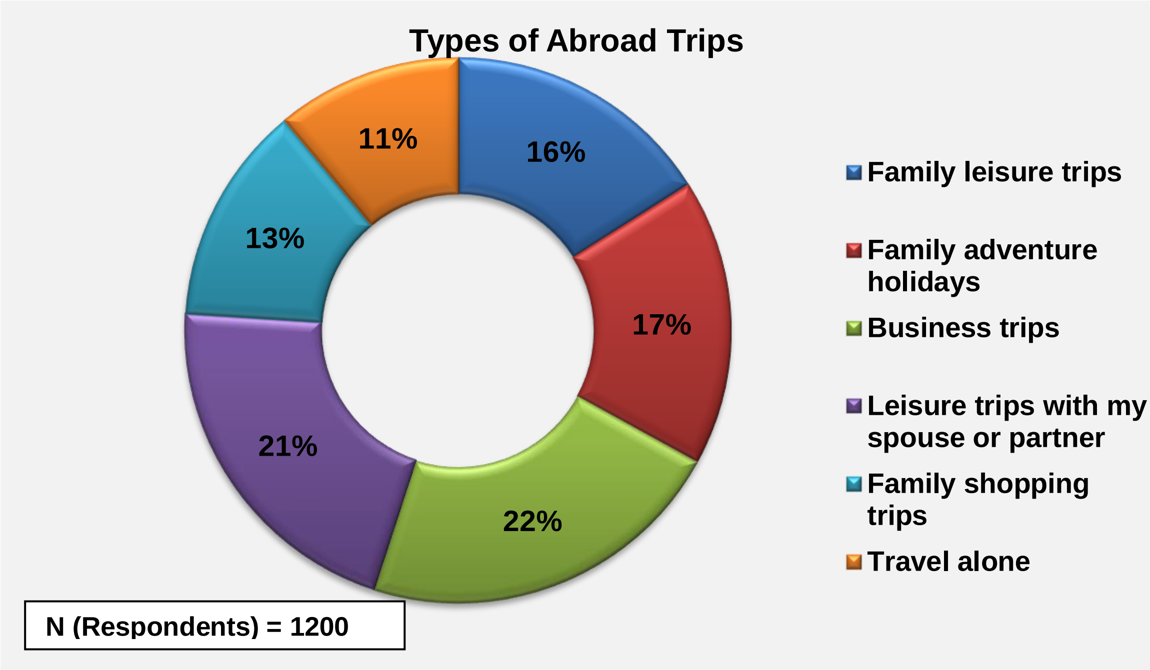
Figure 11: Revealed preferences for foreign destinations



3.1.2.4 Types of trip

16% of all 1200 respondents described their overseas trips in the last three years as family leisure trips. Around 22% claimed that they had travelled on business cum leisure trips. 17% also enjoyed adventure holidays with their families. 21% of the total 1200 respondents claimed that they went on a leisure trip with their spouse or partner.

Figure 12: Respondents categorized by frequency of trips abroad



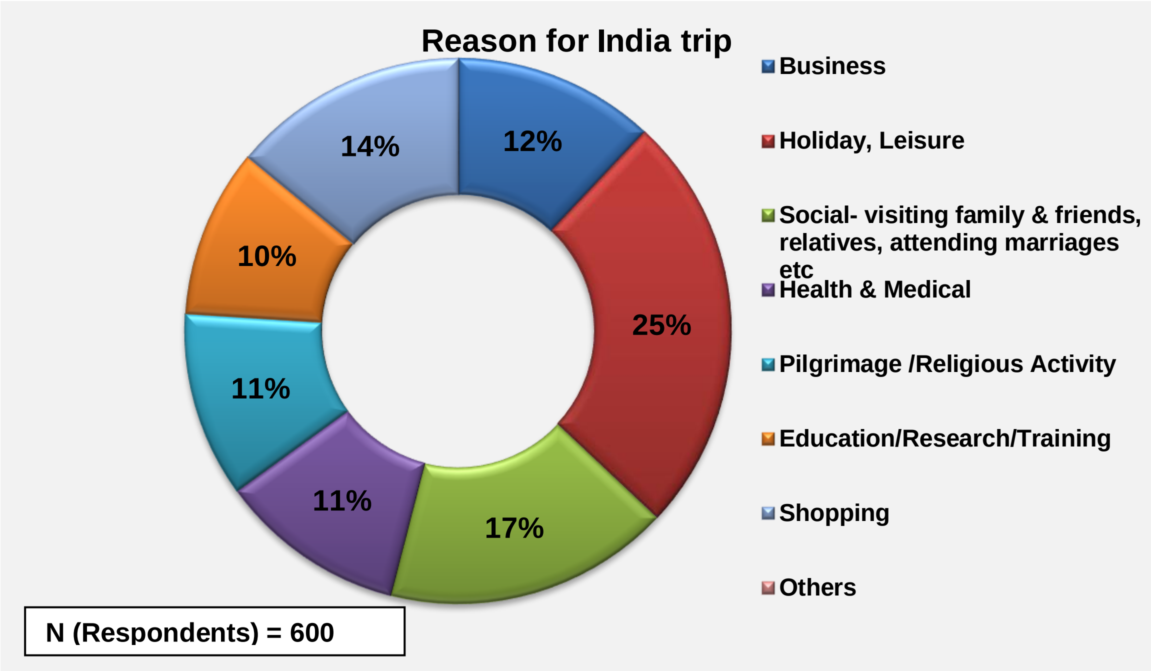
3.1.3 Travel Behaviour of Past Visitors to India

Of the 1200 respondents canvassed during the primary survey, 600 were those who had visited India in the last three years.

3.1.3.1 Reason for Travelling to India

Respondents were asked to indicate their reason for India visit. The maximum traction for India among these travellers from South Africa exists because of the holidays and leisure activities that can be done here. 25% of total 600 respondents indicated this. Other important reasons for travelling to India are visiting friends and relatives, attending weddings, etc. (17% of the total 600 respondents). 14% responses were received in favour of shopping purposes.

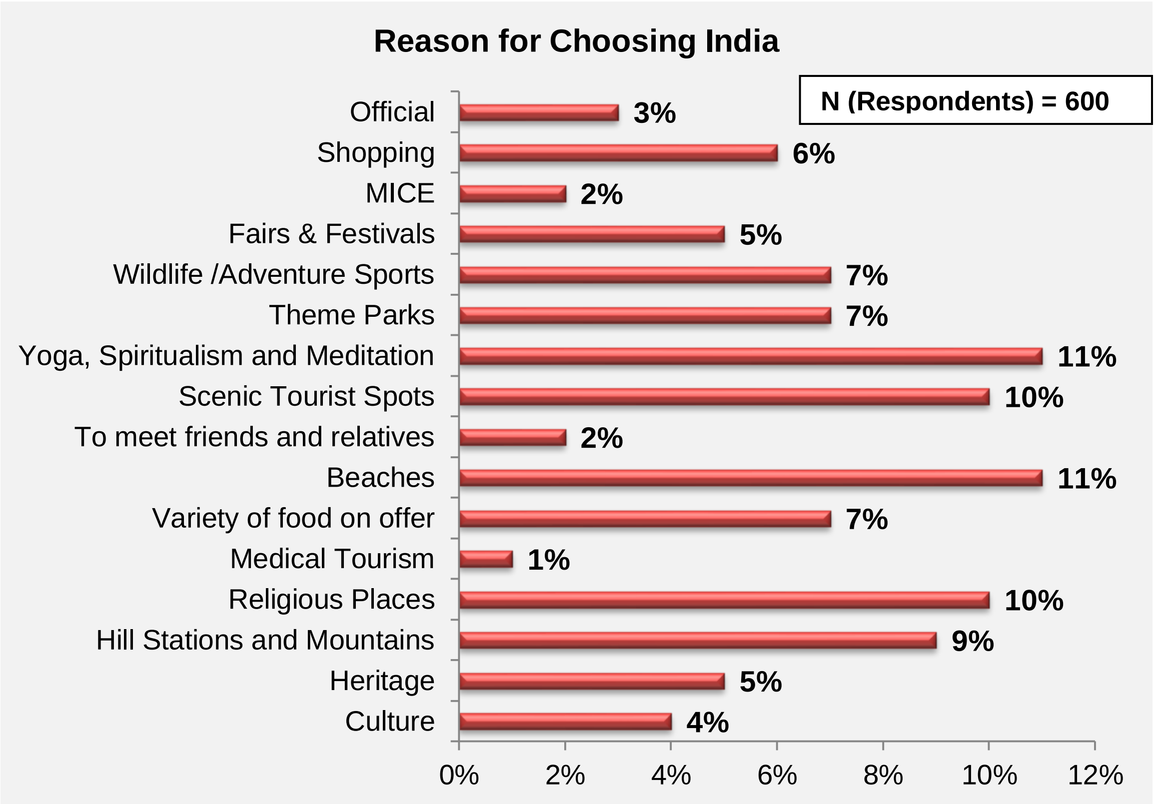
Figure 13: Reason for Travelling to India



3.1.3.2 Reason for Choosing India

Respondents were asked to indicate their reason for choosing India as a travel destination and they were given the freedom to select multiple options. The maximum traction for India among these travellers from South Africa exists because of the heritage that India offers. 12% of total 2312 responses indicated this. Other important reasons for choosing India as a travel destination are Indian Culture (11% of the total 2312 responses), religious places (10% of responses) and scenic tourist sports (10% of total responses received).

Figure 14: Reason for choosing India



3.1.3.3 Respondent's Medical Tourism Details in India

12 responses were received from past respondents about choosing India for their trip for medical tourism. When enquired about the state in India visited for medical tourism, 34% mentioned Delhi.

Table 13: State Visited For Medical Tourism

State	No. of respondents	Percentage
Delhi	4	34%
Kerala	4	33%
Maharashtra	2	17%
Manipal	2	16%
Total	**12**	**100%**

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

Table 14: Institution in India Visited for Medical Tourism

Gender	No. of respondents	Percentage
AIIMS	4	34%
Ayurveda	4	33%
Columbia Asia	2	17%
Manipal Hospital	2	16%
Total	**12**	**100.00%**

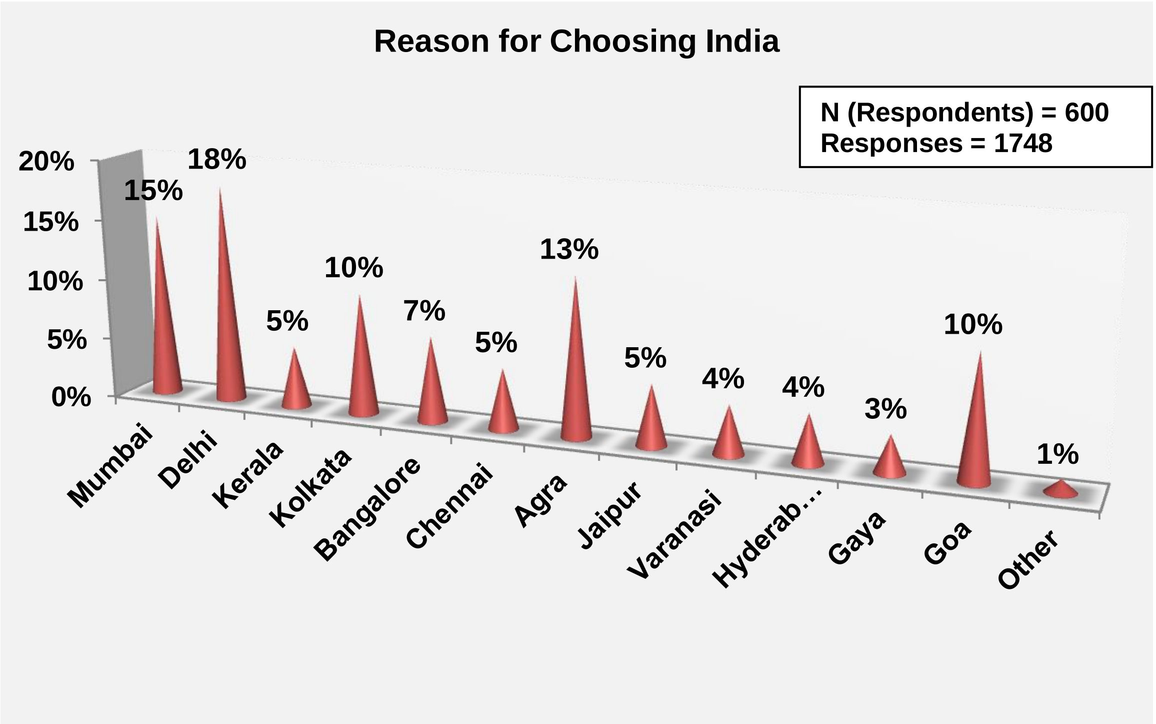
Table 15: Satisfaction Level with Medical Tourism in India

Gender	No. of respondents	Percentage
Fully satisfied	10	83%
Partially satisfied	2	17%
Not satisfied	0	0%
Total	**12**	**100%**

3.1.3.4 Cities Visited in India

600 past India travellers to India mentioned the cities they visited in India during their visit. 600 respondents provided 1748 responses regarding the cities in India they visited during their India trip. 18% of the total responses were received in favour of Delhi which came up as the most visited city in India by past South African travellers to India. The next most visited city in India emerged as Mumbai with 15% of total responses received.

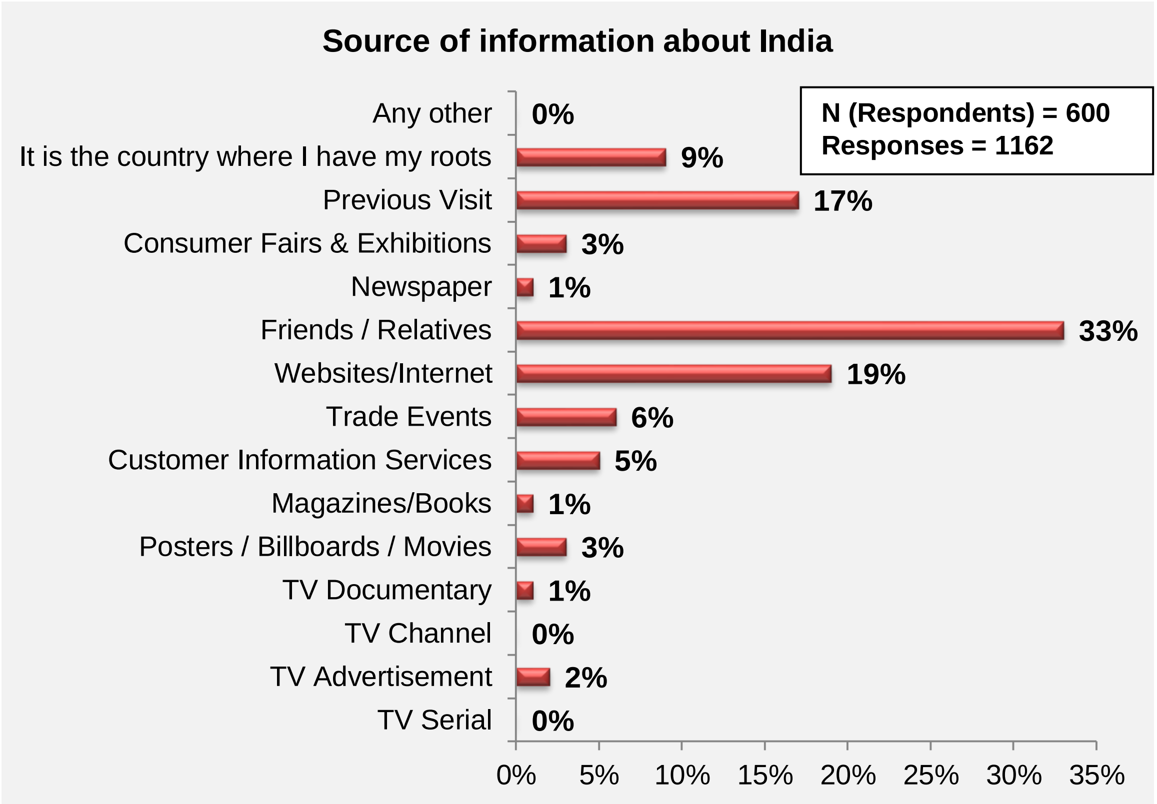
Figure 15: Cities Visited in India



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 19% of responses received indicated this. Customer information services and trade events are also an important source of information as was revealed by 16% and 15% of the responses received respectively. Many of them (10% of total responses) had visited India before.

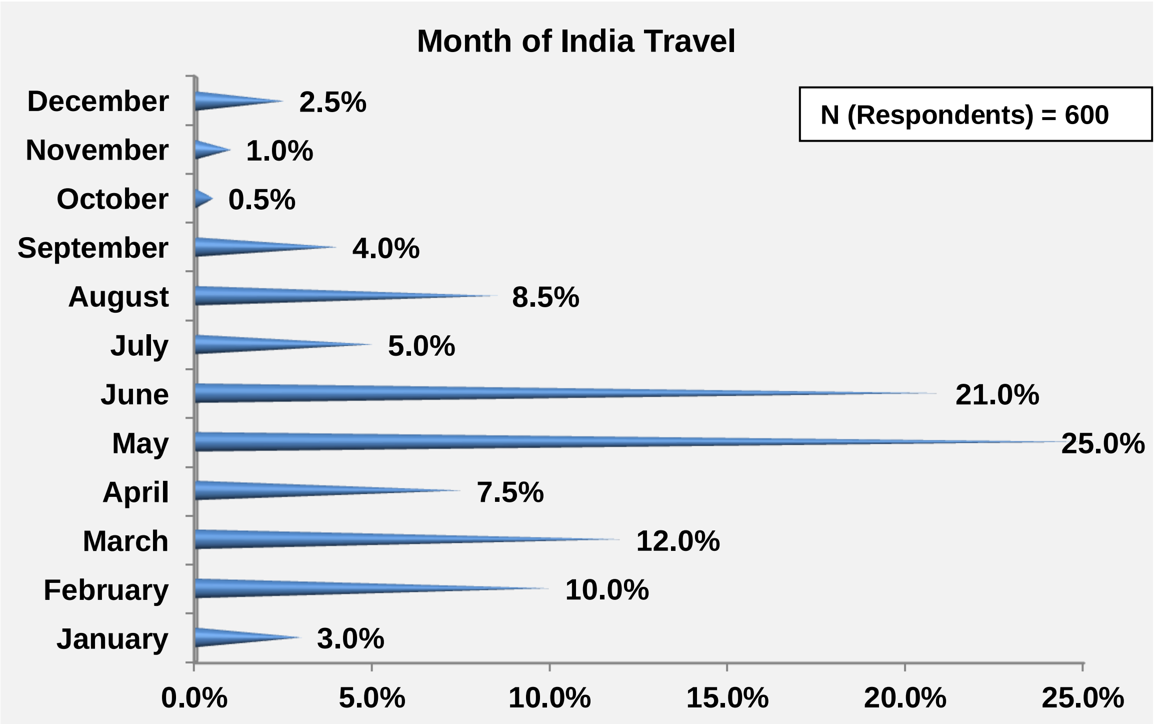
Figure 16: Source of information about India



3.1.3.6 Month of India Travel

600 past India travellers to India mentioned the month during which they visited in India. 25% of the total 600 respondents mentioned May to be their months of visit. June was the month of visit for 21% of the total 600 respondents. October was the months of least visits by South Africans surveyed (0.5% of total 600 respondents). The summer months of May and June in India are the winter months for South Africa and hence can be interpreted as the preferred months of visiting India and other countries.

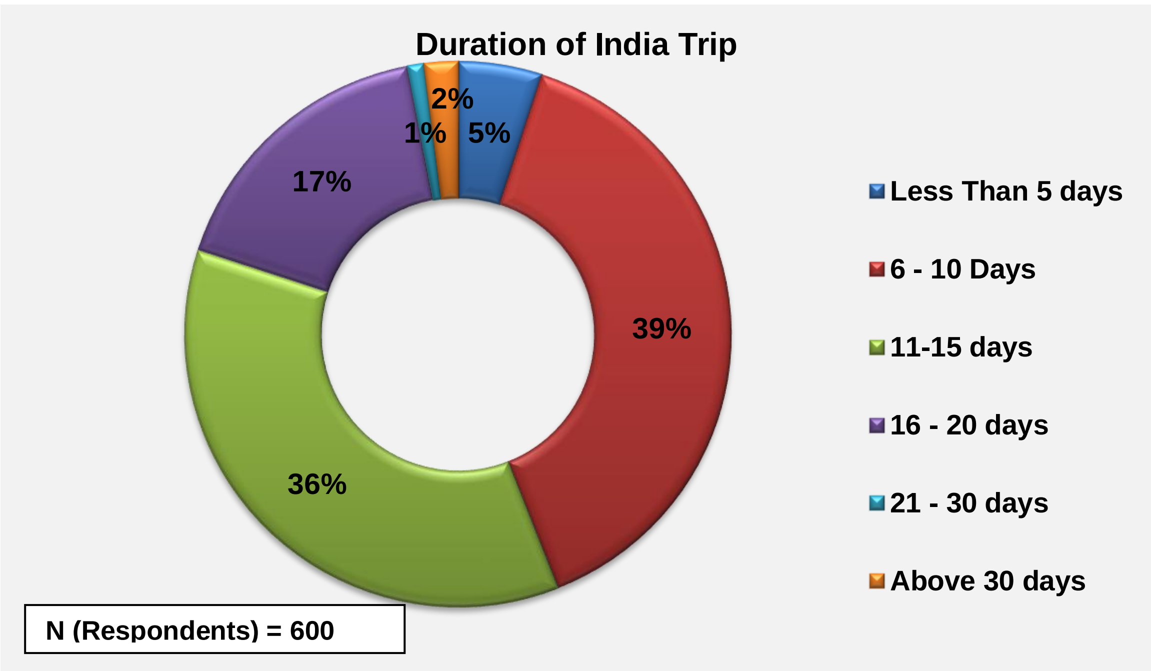
Figure 17: Month of India Travel



3.1.3.7 Duration of India Travel

39% of all 600 respondents mentioned that their India trip duration was of 6–10 days. While 36% of the total 600 respondents mentioned that their India trip lasted for 11–15 days. Only 2% of the total 600 respondents toured India for more than 30 days.

Figure 18: Duration of India travel



3.1.3.8 Accommodation Availed in India

30% of the total 600 past travellers to India mentioned that they stayed in mid-range hotels in India during their visit. 22% of the total 600 respondents provided mentioned that they stayed in budget hotels during their India trip. Only 11% of the total respondents stayed with their friends and relatives during their India trip.

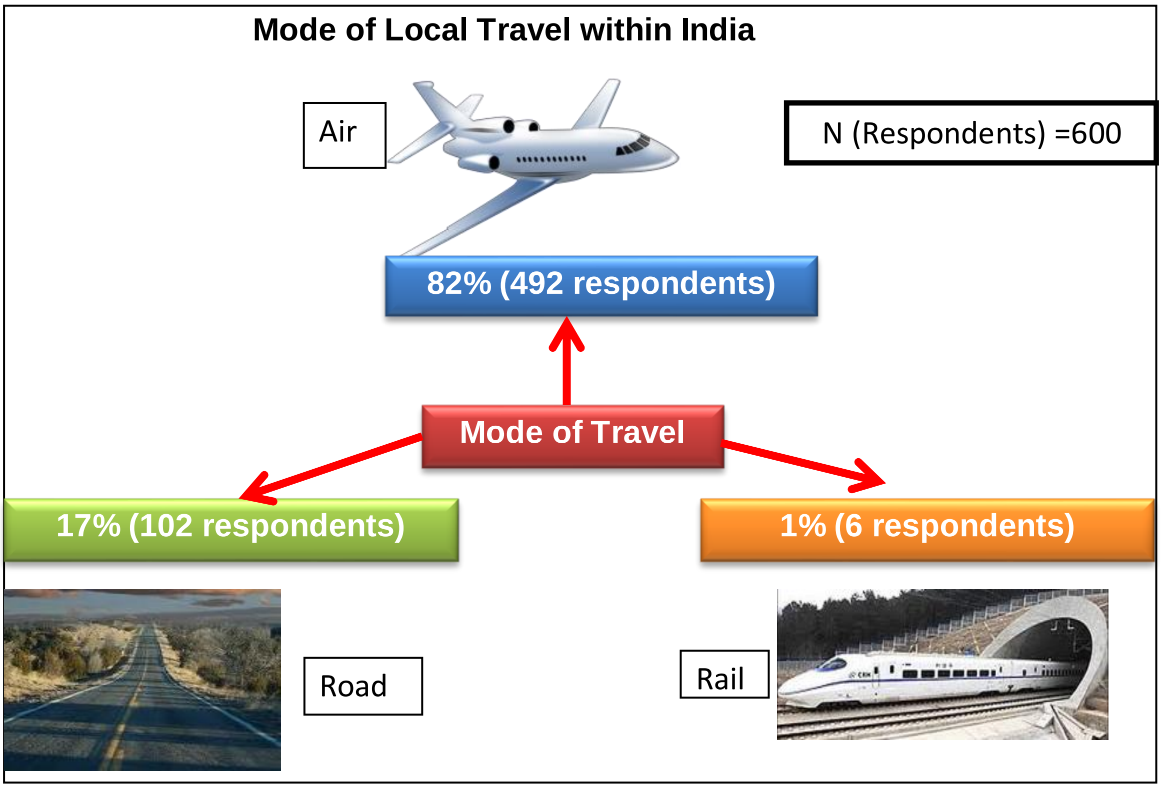
Figure 19: Accommodation Availed in India

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, 82% people travelled by air alone. Next most favoured mode of travel within India was by road (17% of the total 600 respondents). Only 1% of the total 600 respondents preferred to travel by rail within India.

Figure 20: Mode of Local Travel within India

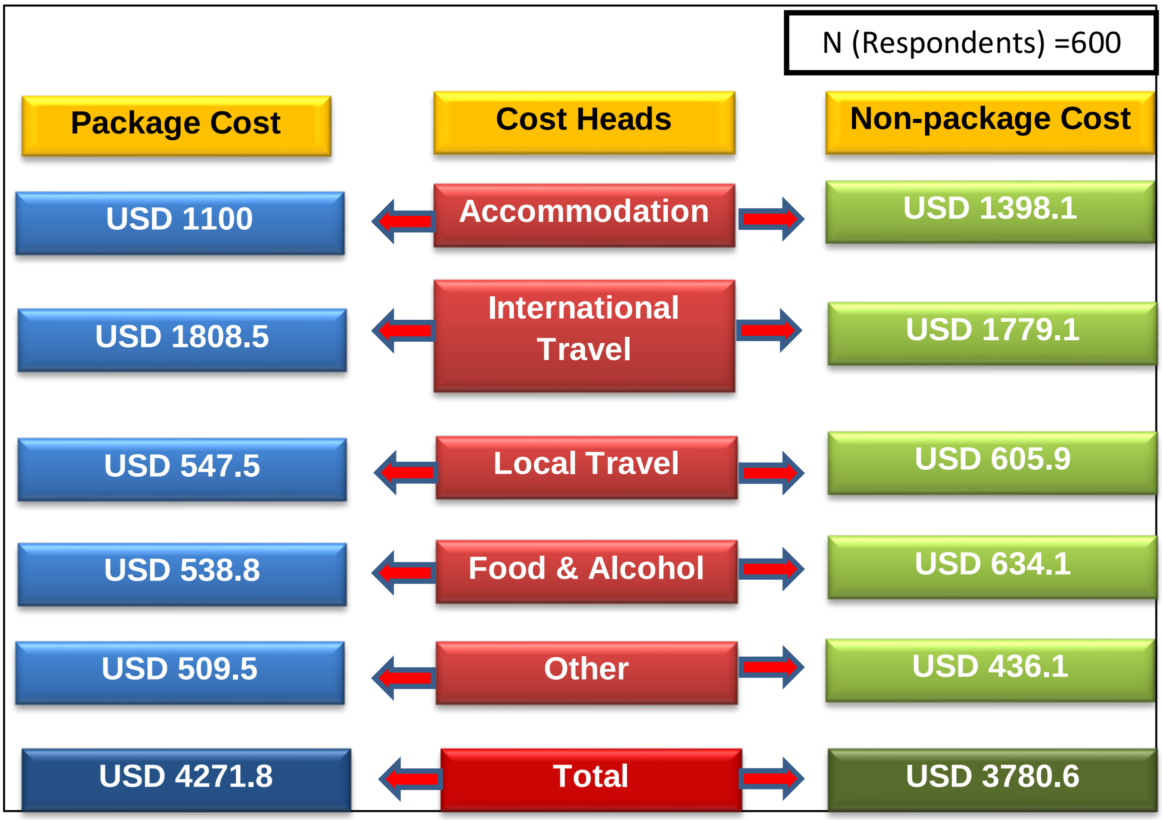


Of the 6 respondents who responded to the query on trains availed of, only 2 claimed to have availed of the luxury trains such as Golden Chariot and Indian Maharaja.

3.1.3.10 Expenses for India Trip

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

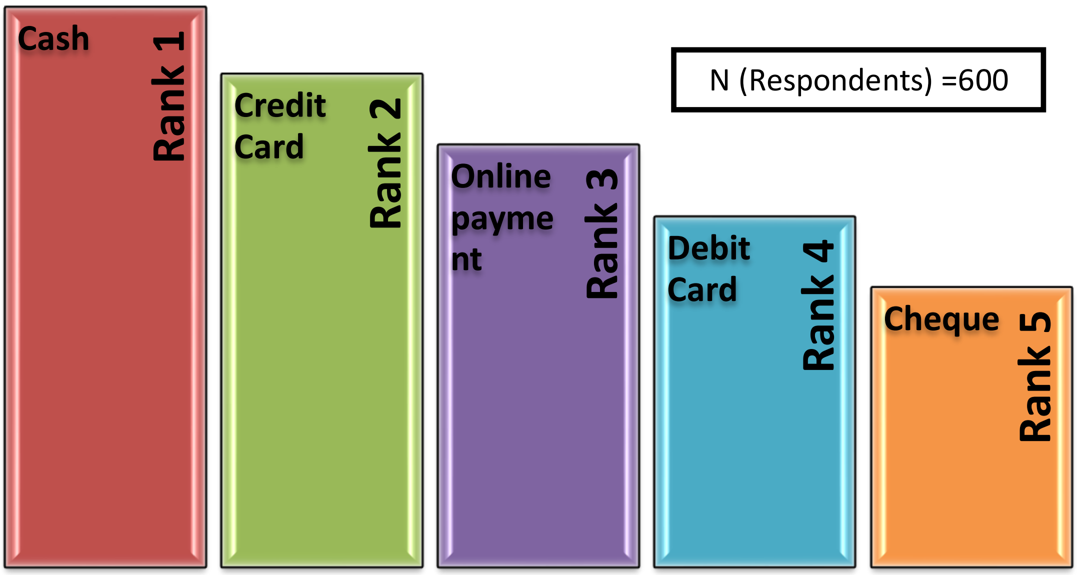
Figure 21: Average per Person Expenses for India Trip



3.1.3.11 Payment Mode in India

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

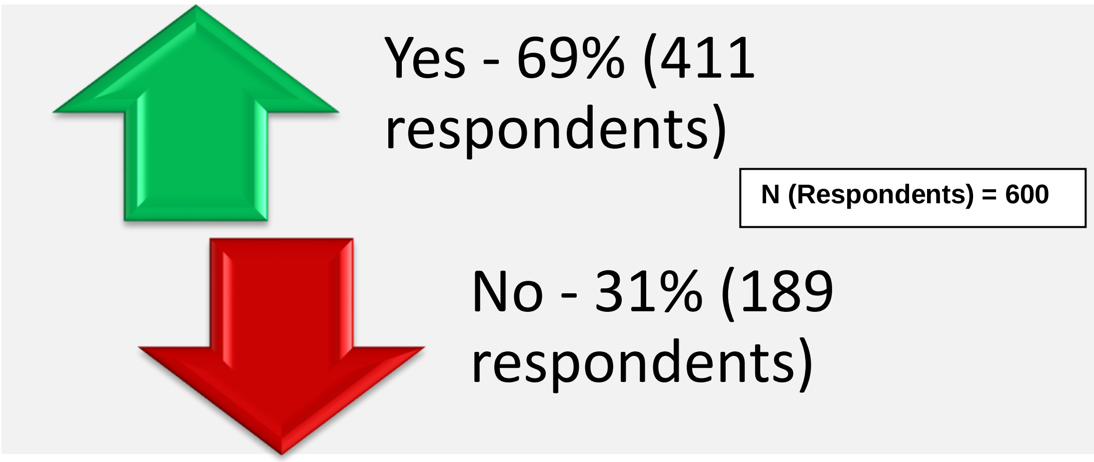
Figure 22: Payment Mode in India



3.1.3.12 Revisit India

Respondents who visited India were asked if they would revisit India in future and the responses received from 600 past South African travellers to India are presented below.

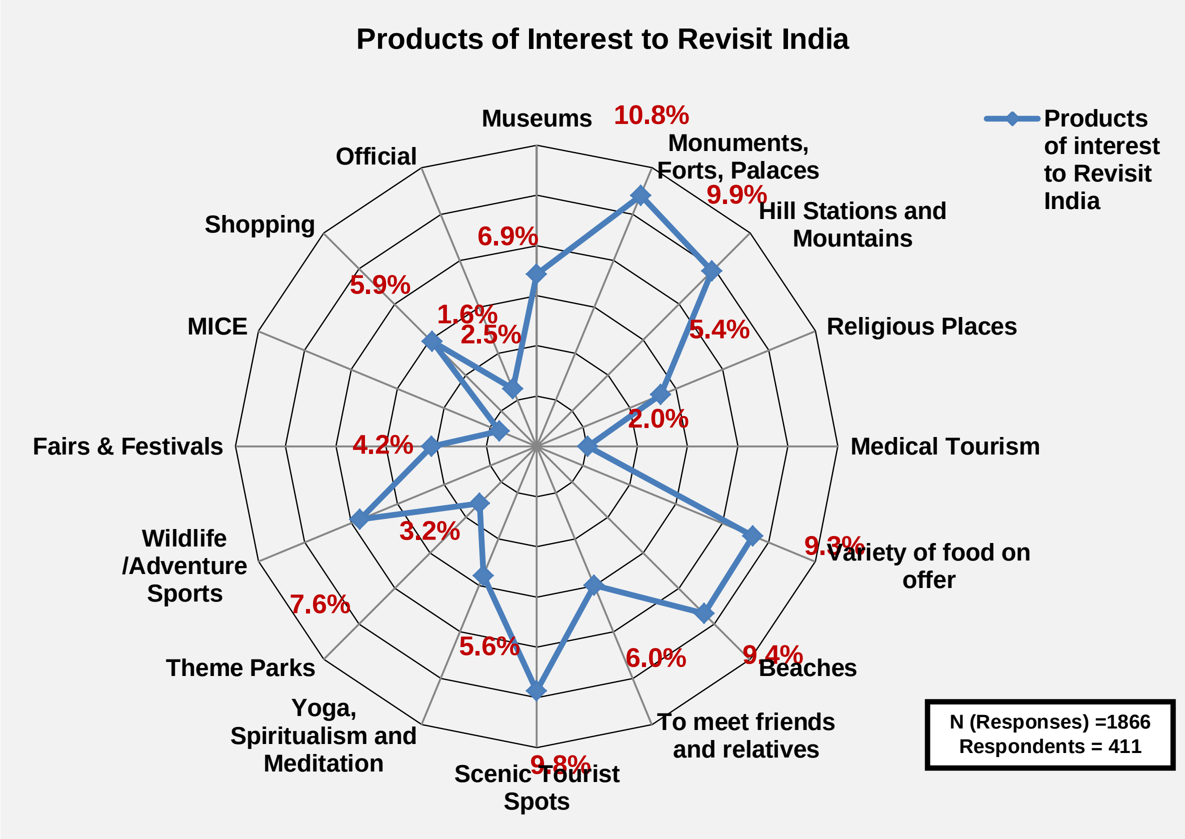
Figure 23: Revisit India



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 (46 of 1866 responses) who plan to visit India on official purposes and another 30 responses indicating pursuits related to MICE to attract visitors to India.

Figure 24: Attractions for revisiting India



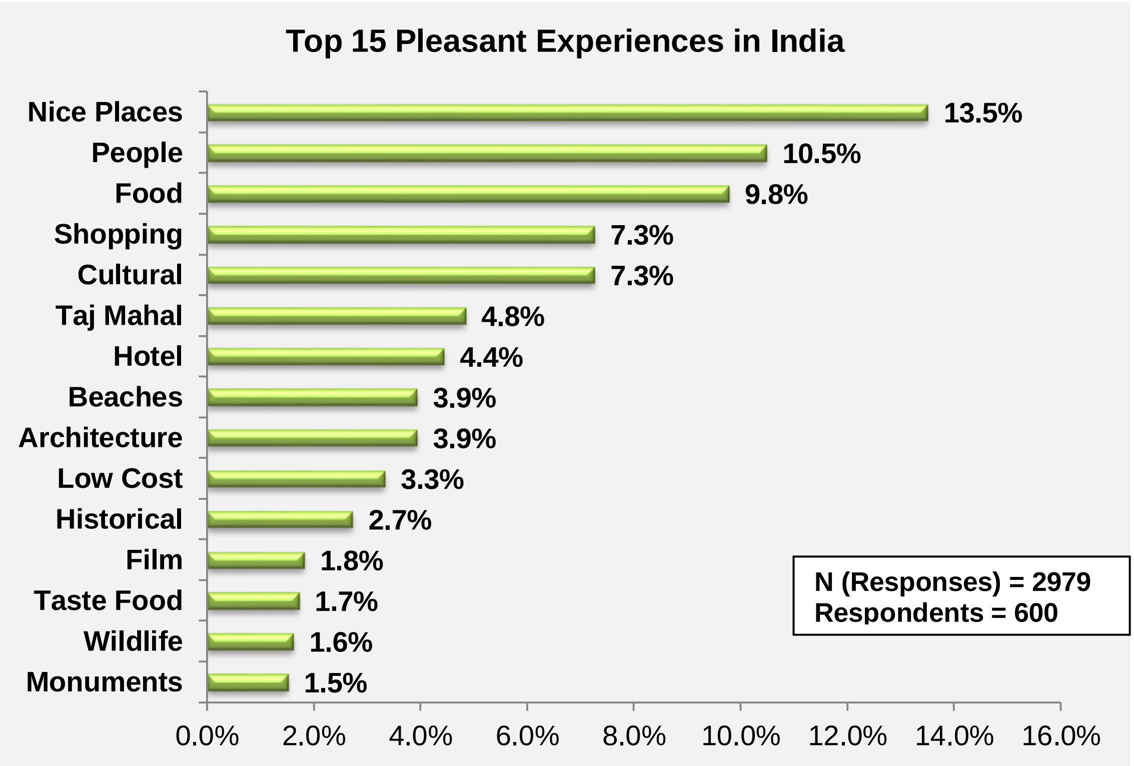
3.1.3.14 Reason for not revisiting India

The 189 persons of 600 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 expenses were also important concerns cited.

3.1.3.15 Best and worst experiences in India

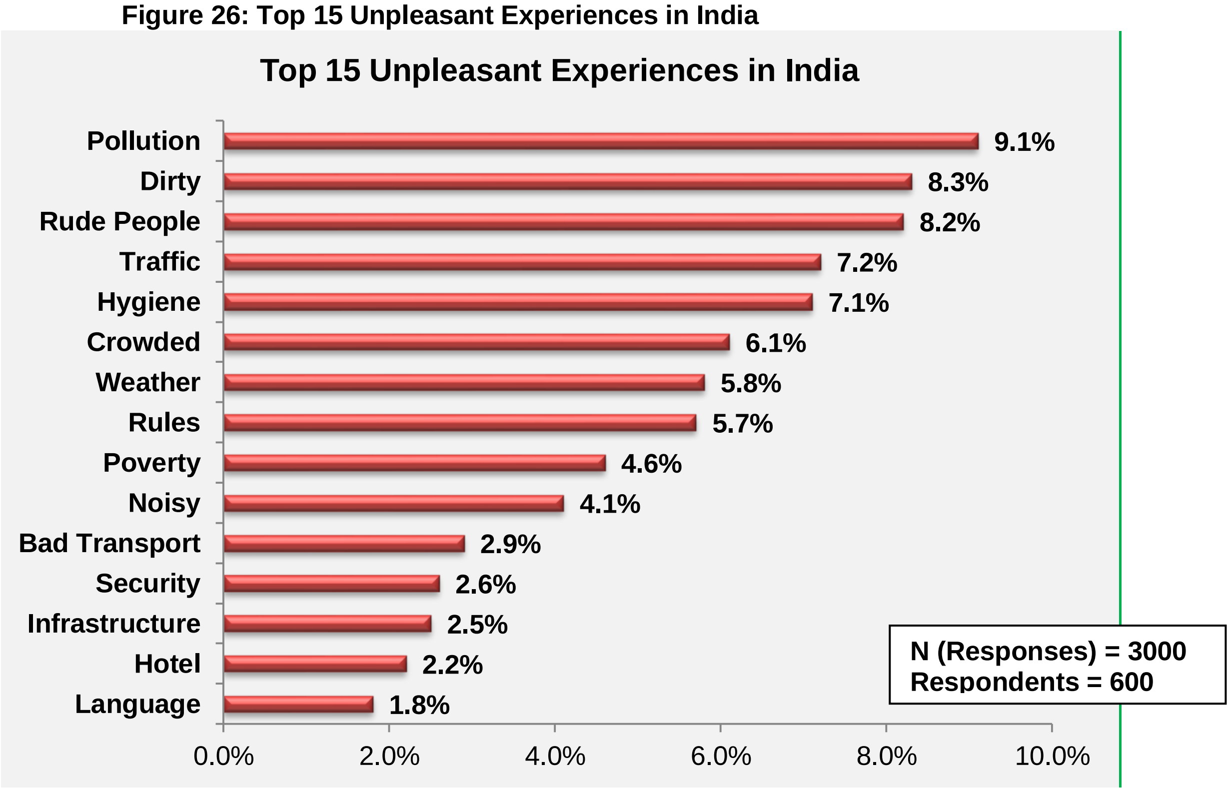
Tourists from South Africa, who have visited India, are very impressed by the scenic destinations in India and particularly happy with the hospitality warmth and kind-heartedness of the people in India. Those fond of food like India because of the vast cuisine it offers. Respondents who visited India were asked to indicate their best and most enjoyable aspects about coming here and they were given the freedom to select multiple options. The best part of coming to India is cited as scenic destinations (13.5% of the responses), friendly people (10.5% of the responses) and Indian food (9.8% of the responses).

Figure 25: Top 15 Pleasant Experiences in India



Sources of discomfort or unpleasantness were cited as pollution and dirty environment. Many respondents felt that the people in India are rude in terms of behaviour. Traffic and hygiene standards were also cited as sources of unpleasantness.

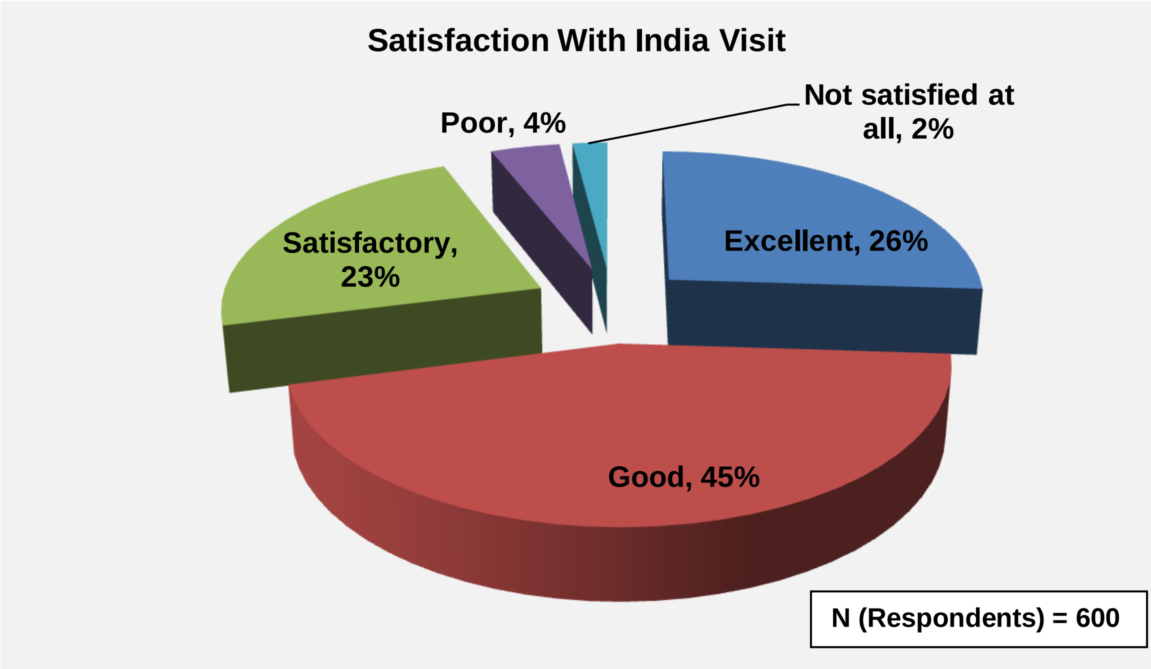
Figure 26: Top 15 Unpleasant Experiences in India



3.1.3.16 Satisfaction from visiting India

Overall, 45% of the 600 past travellers to India interviewed in the survey were satisfied with their experience in visiting India and mentioned it was “good”. As many as 26% in fact rated their India holiday experience as ‘Excellent’.

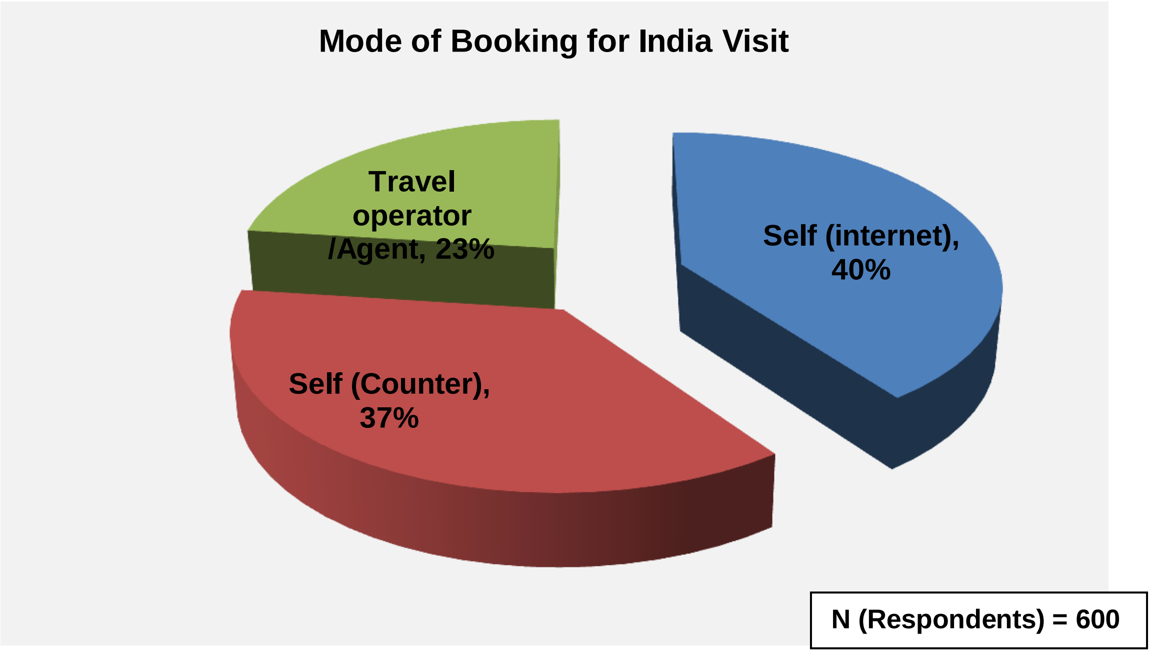
Figure 27: Satisfaction with Visit to India



3.1.3.17 Mode of booking

Around 40% of the respondents booked their tickets online themselves. Another 23% use travel agents while 37% of the total 600 respondents booked their tickets themselves over the counter.

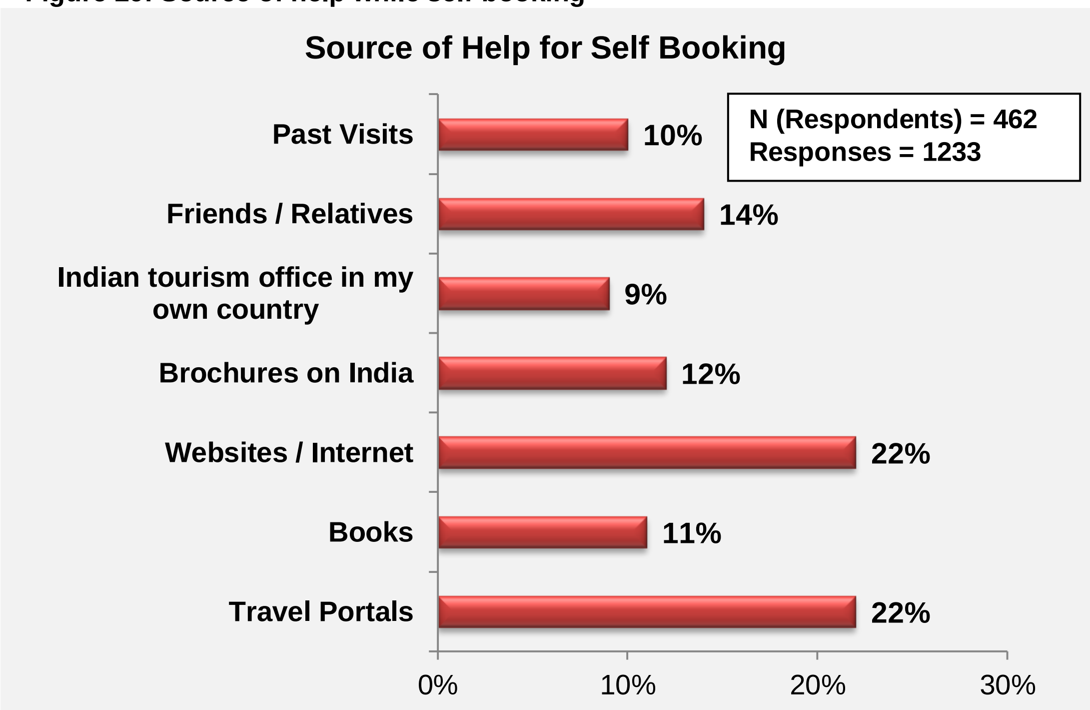
Figure 28: Mode of Booking for India Trip



3.1.3.18 Sources of Help While Self Booking

The 462 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. 22% of the responses received each for internet and travel portals revealed that the internet was a very important source of information for travellers as well as a powerful tool for sorting out travel modalities. 14% responses showed that on occasion friends and relatives were also consulted.

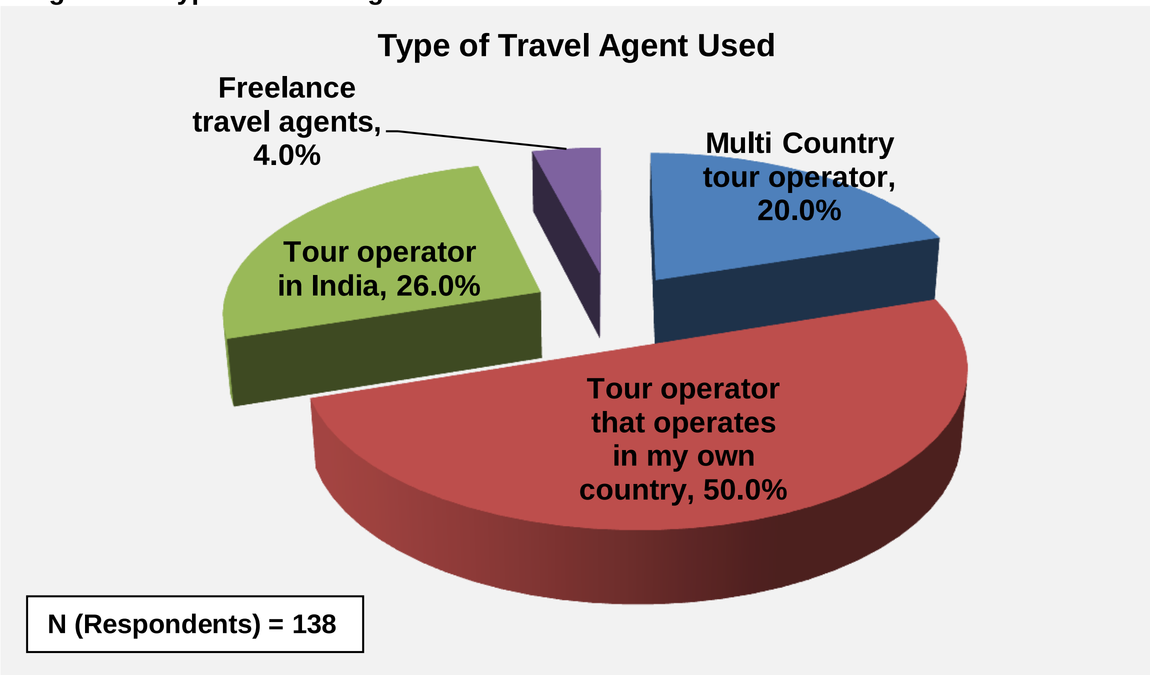
Figure 29: Source of help while self-booking



3.1.3.19 Type of tour operator used

Of the 600 respondents who travelled to India in the past, 138 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 50% of the cases these are operators from the South Africa. In 20% cases multi-country tour operators are also consulted. But consultation with Indian tour operators is higher at 26%.

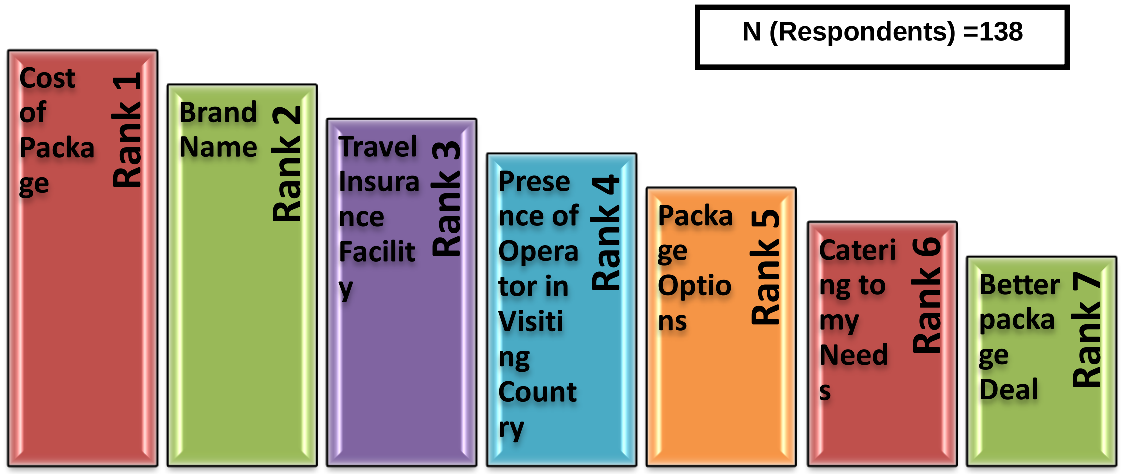
Figure 30: Type of Travel Agent Used



3.1.3.20 Tour operators selection criteria

In the choice of the tour operator, for these 138 respondents, the cost of the package offered were the key deciding factor followed by brand name and travel insurance facility offered by the tour operator.

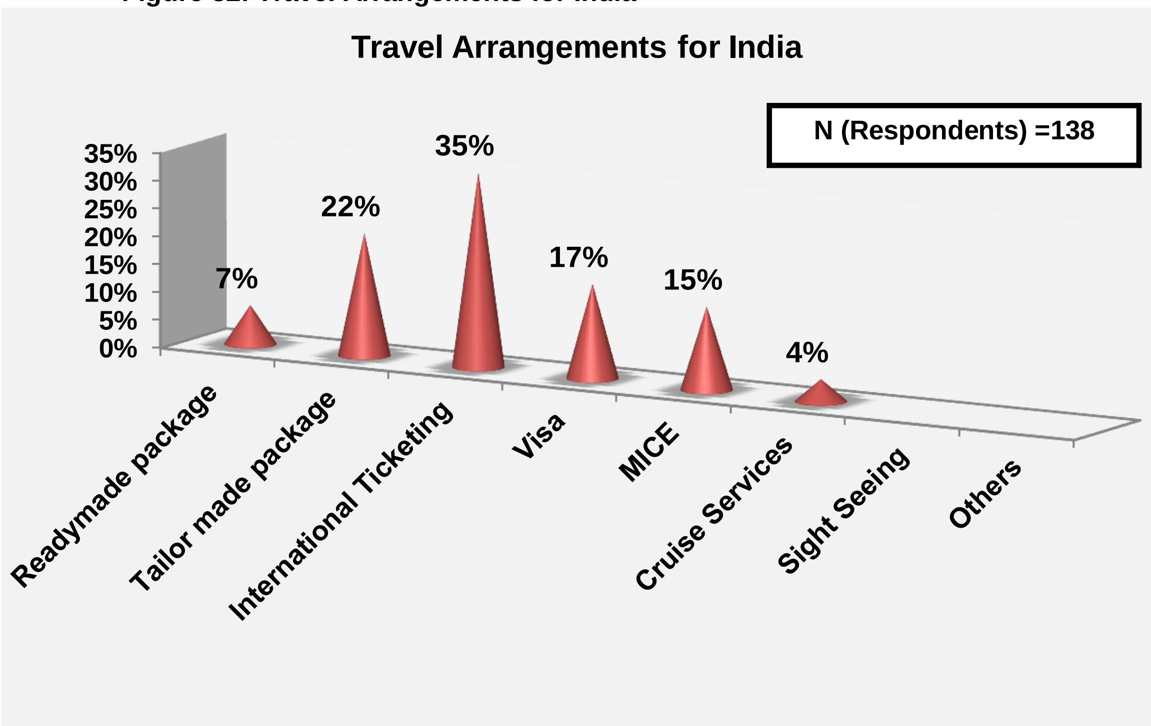
Figure 31: Tour Operators Selection Criteria



3.1.3.21 Travel Arrangements for India

The 138 respondents, who opted for tour operators for their trip to India, were asked about the kind of travel arrangements they used from tour operators. International ticketing was the service that most (35% out to total 138 respondents) travellers opted for travel arrangement through tour operators 22% out of the total 138 respondents mentioned that tailor made package was the travel arrangement they chose.

Figure 32: Travel Arrangements for India

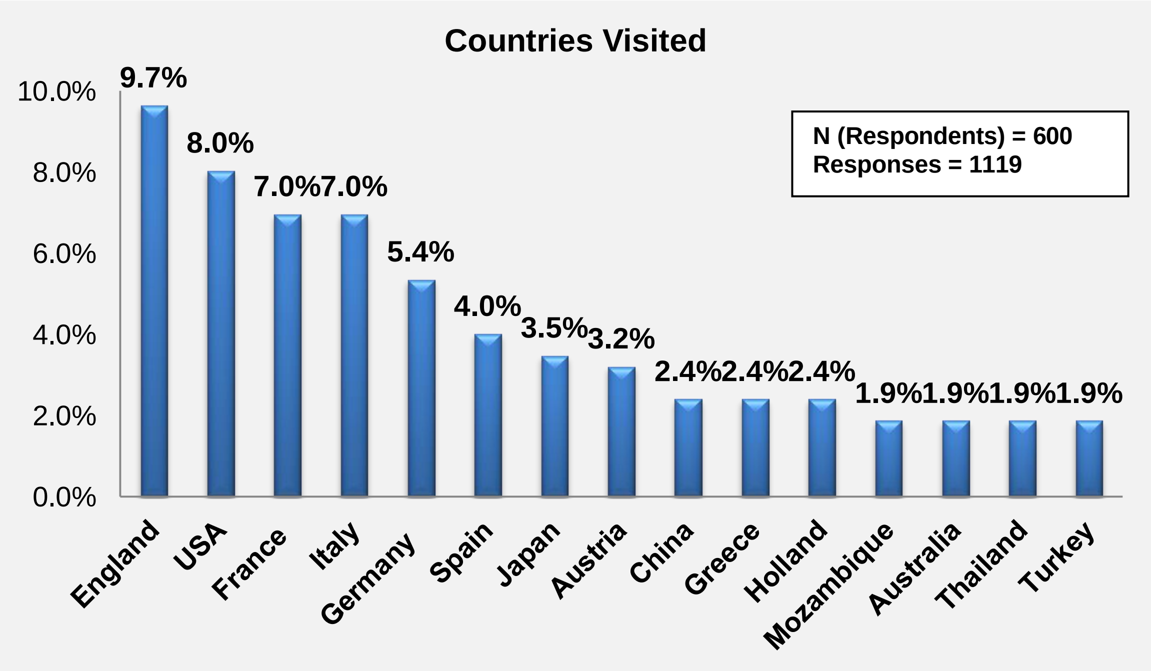


3.1.4 Travel Behaviour of Past Visitors to Other Countries

3.1.4.1 Countries Visited in past

Among the 600 respondents who had travelled out of South Africa in the past one year but not to India, the maximum visits have been made to England and USA followed by France, Italy and Germany. Spain, Japan and Austria are also quite popular amongst South African Travellers. These top countries constituted 47.7% of all responses.

Figure 33: Countries Visited

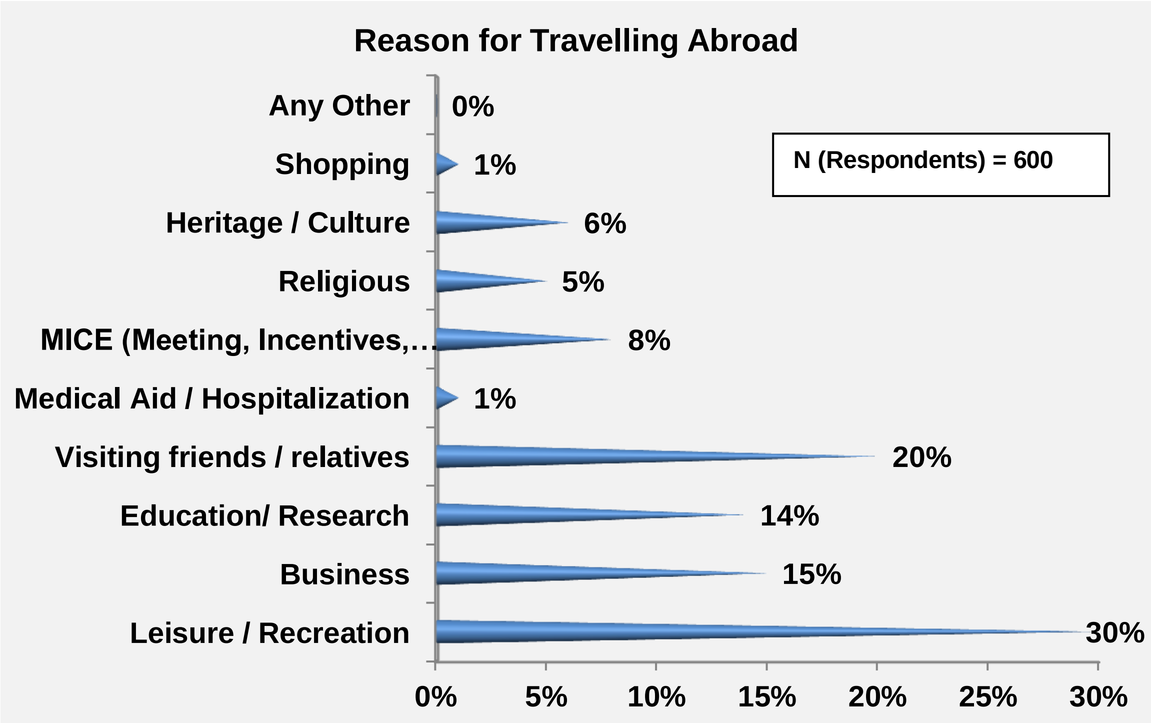


3.1.4.2 Reason for Travelling Abroad

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 (30% of total 600 respondents); while some other factors were to visit friends and relatives (20% of total 600 respondents) or business purposes (15% of all responses).

Other factors such as shopping, medical aid, religious pursuits, etc. were also cited as reasons but were less significant.

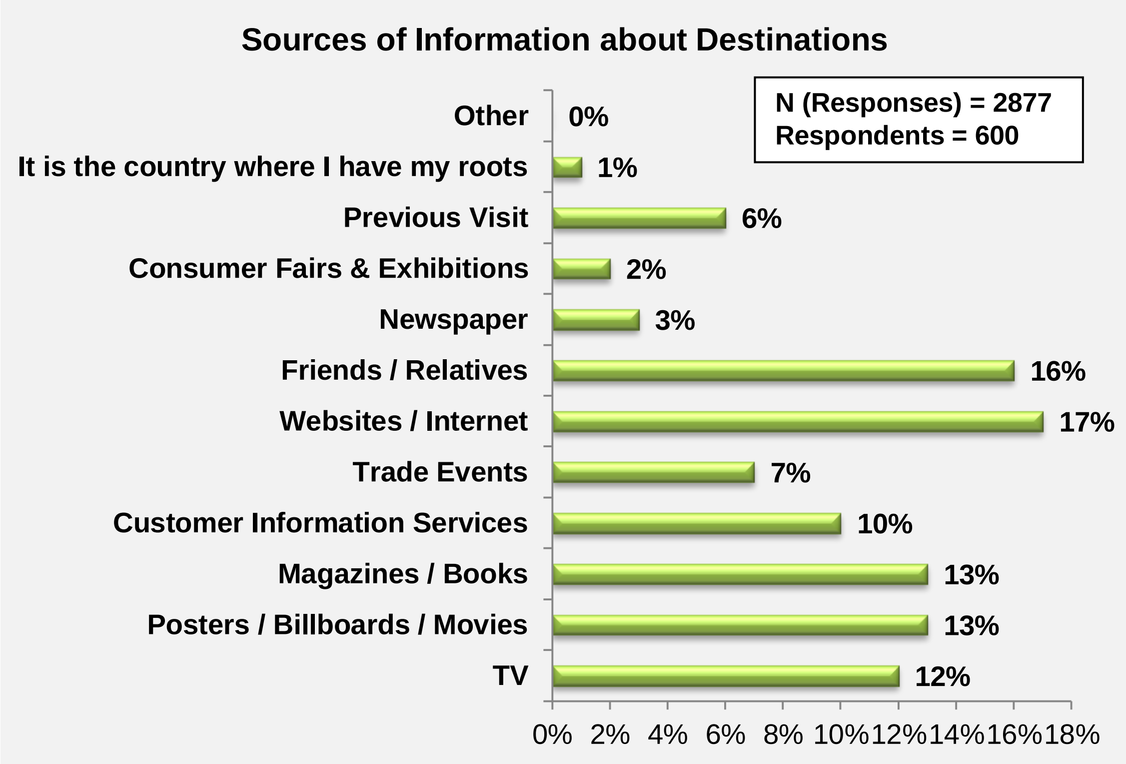
Figure 34: Reason for Travelling Abroad



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. 600 respondents yielded 2877 responses. A large number of travellers have found out about the destination countries in most cases from the internet or websites (17% of all responses). In many cases they have also heard from relatives and friends as also because they have been to the country earlier (16% of all responses). Magazines and books were also cited as sources of information (13% of all responses)

Figure 35: Sources of Information about Destinations Visited



3.1.4.4 Trip Satisfaction

An overwhelming 67% of the respondents believed that their experience had been good to excellent.

Figure 36: Trip Satisfaction

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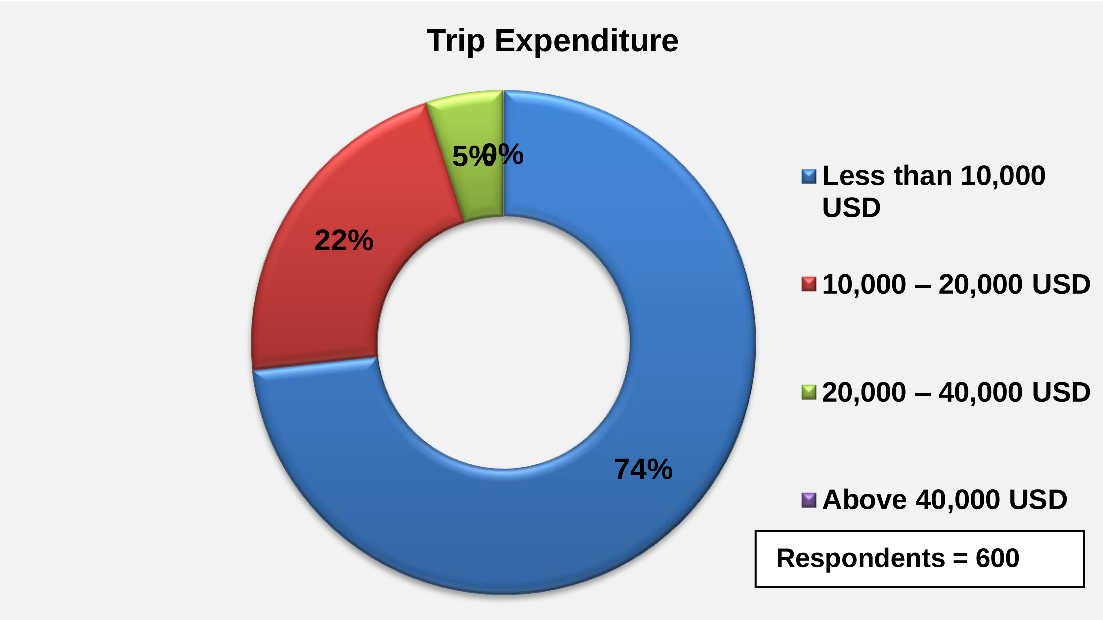
3.1.4.5 Trip Expenditure

An overwhelming 74% of the respondents spent less than USD 10,000 for their entire trip in total.

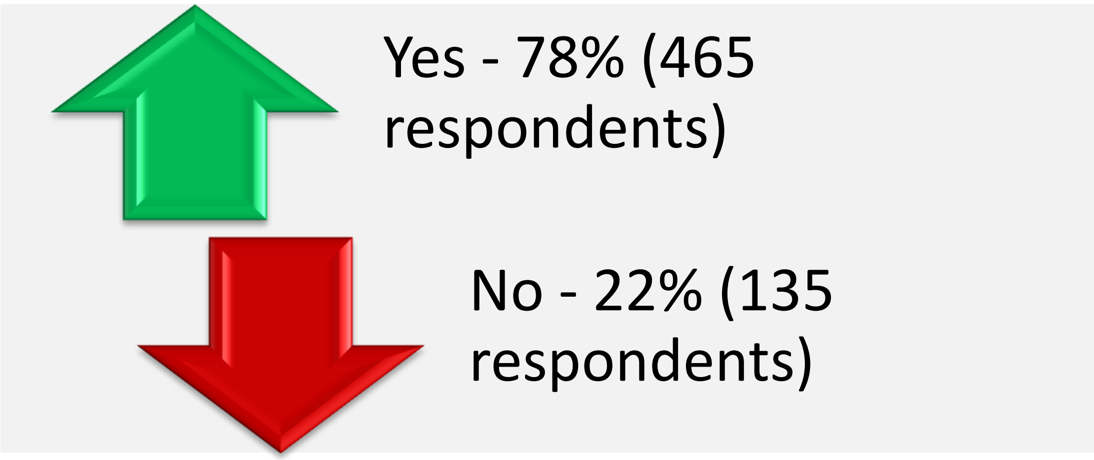
Figure 37: Trip Expenditure



3.1.4.6 Value for money destinations visited

An overwhelming 78% of the respondents out of the total 600 respondents believed that their experience had been worth the money they spent.

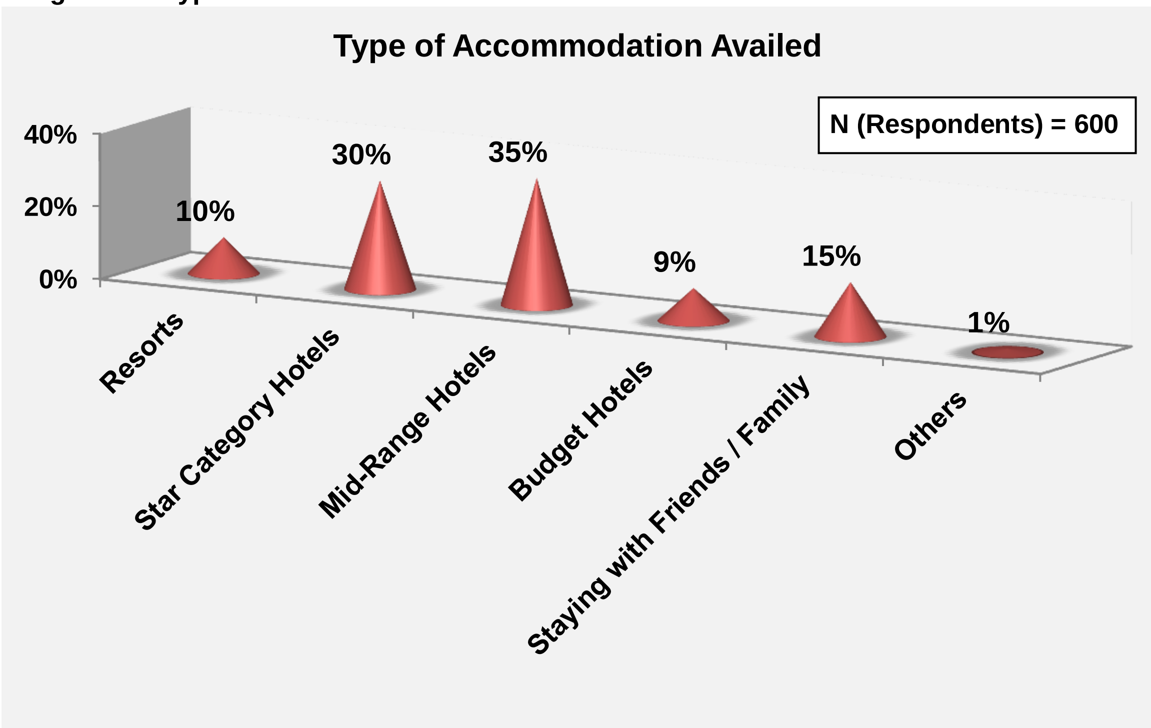
Figure 38: Value for Money Destination



3.1.4.7 Type of accommodation used

About 35% of all 600 respondents who travelled to countries other than India stayed in mid-range hotels during their visit. 9% stayed in budget hotels while about 15% stayed with friends and relatives. Only 180 of the 600 respondents spent on star category hotels.

Figure 39: Type of Accommodation Availed

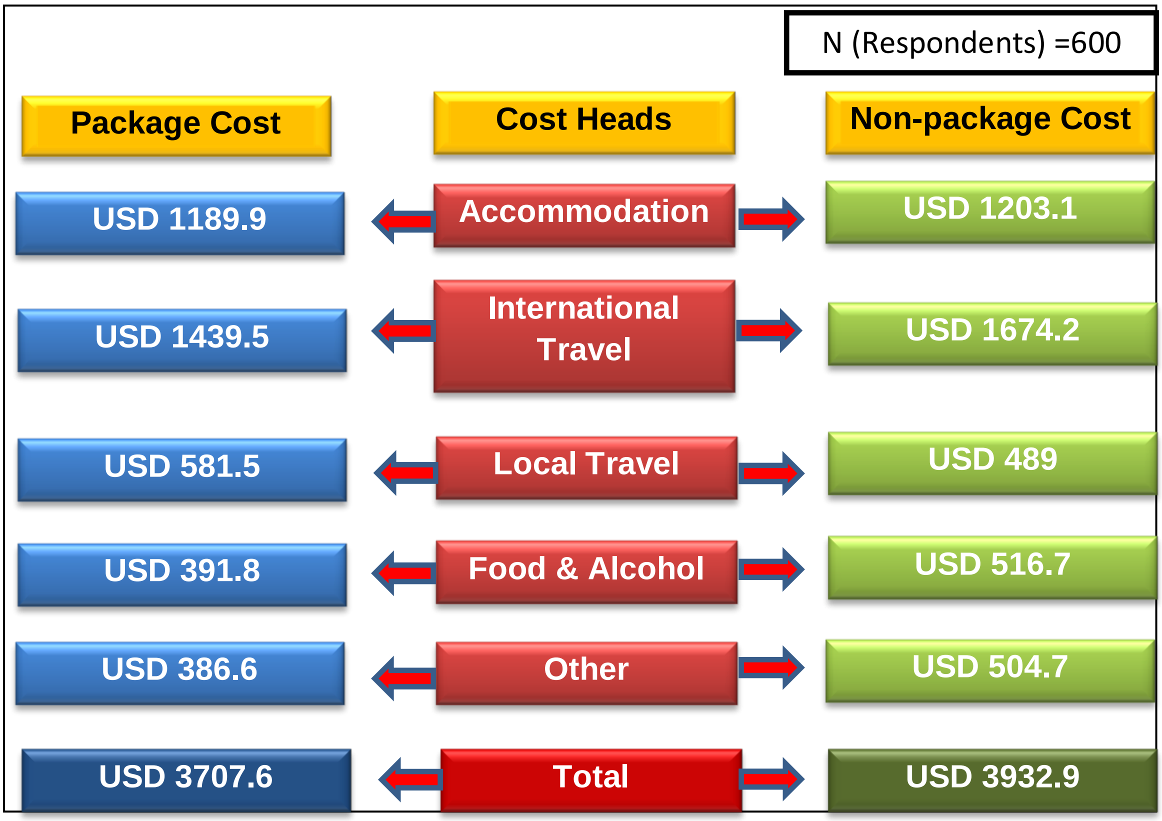


Note: Star category hotels: Hotels with more than 5 stars; Mid-ranged hotels: Hotels lying in the bracket of 3-4 stars; Budget hotels: Hotels lying in the bracket of 1-2 stars

3.1.4.8 Package and Non-package Expenses Incurred

The package and non-package expenses incurred by the 600 respondents who travelled abroad in past is presented in the figure below.

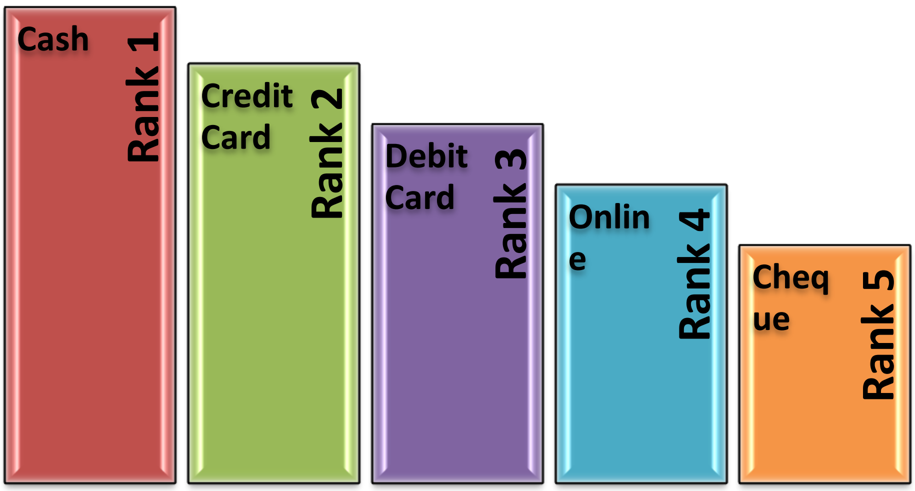
Figure 40: Package and Non-package Expenses



3.1.4.9 Mode of Payment

The 600 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 600 respondents was cash.

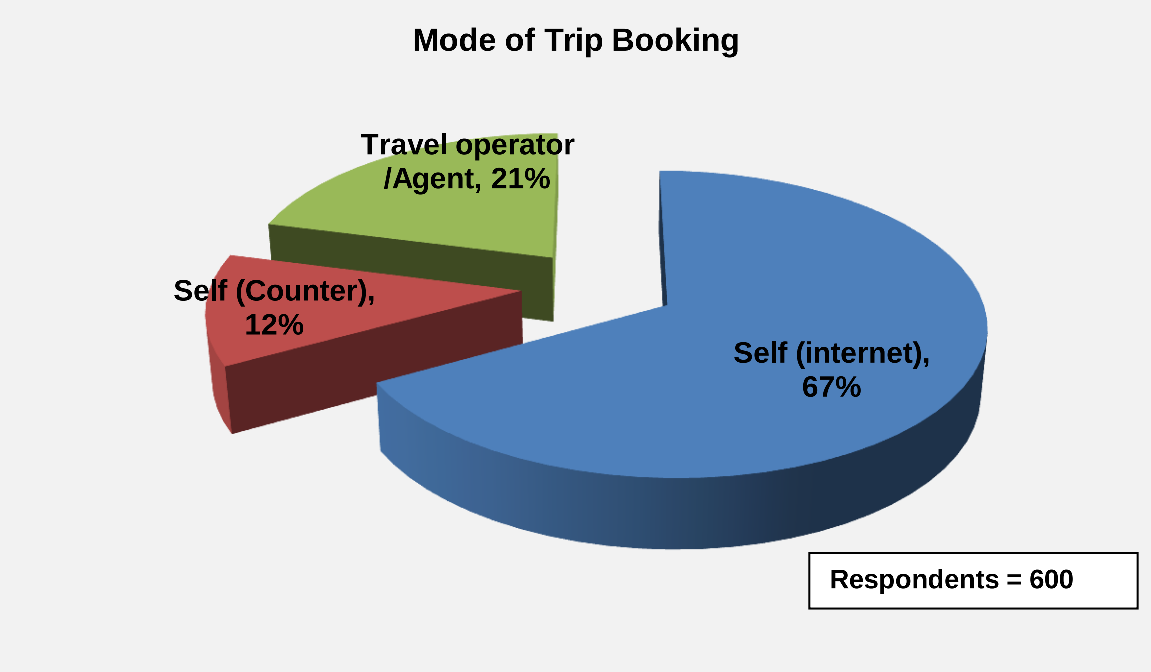
Figure 41: Mode of Payment



3.1.4.10 Mode of Trip Booking

About 79% of all 600 respondents who travelled to countries other than India booked their trips themselves.

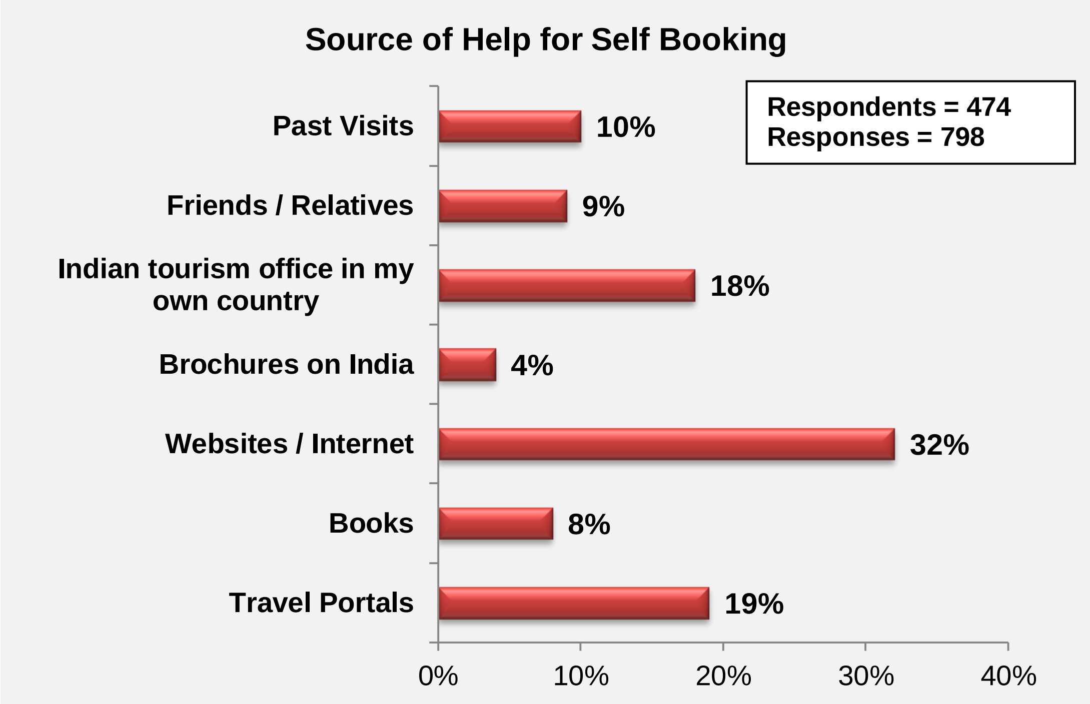
Figure 42: Mode of Trip Booking



3.1.4.11 Help While Self Booking for Trip

The 474 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.798 responses were received from the 474 respondents and 32% of responses indicated that the major source of help was websites/ internet.

Figure 43: Source of Help for Self Booking



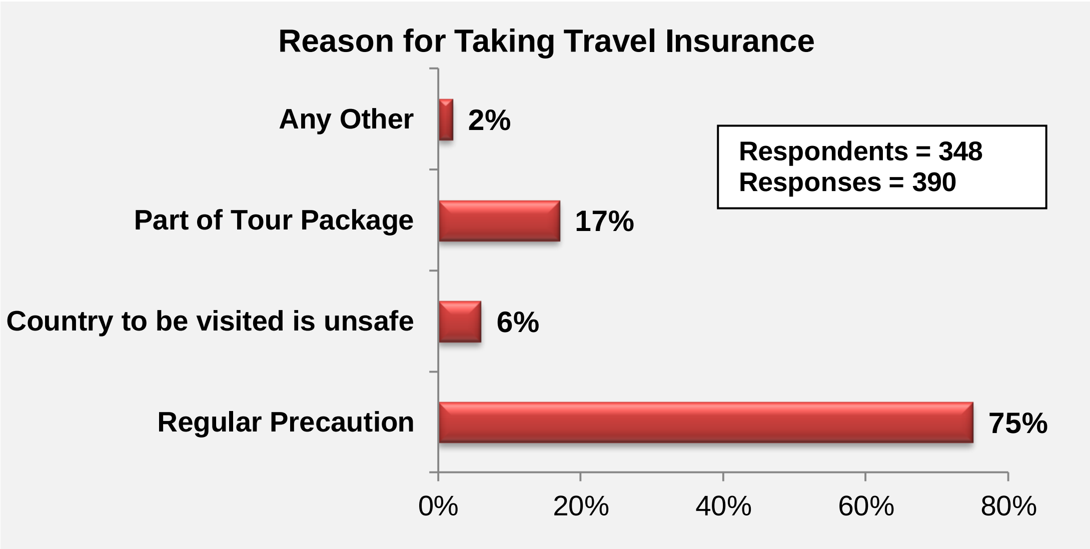
3.1.4.12 Travel Insurance Availed

About 58% of total 600 respondents who travelled to countries other than India availed travel insurance for their trip.348 respondents opted for travel insurance while 252 respondents (42% of 600 respondents) did not opt for travel insurance.

3.1.4.13 Reason for Taking Travel Insurance

About 75% of 348 respondents who availed travel insurance mentioned that they took it just for regular precaution.

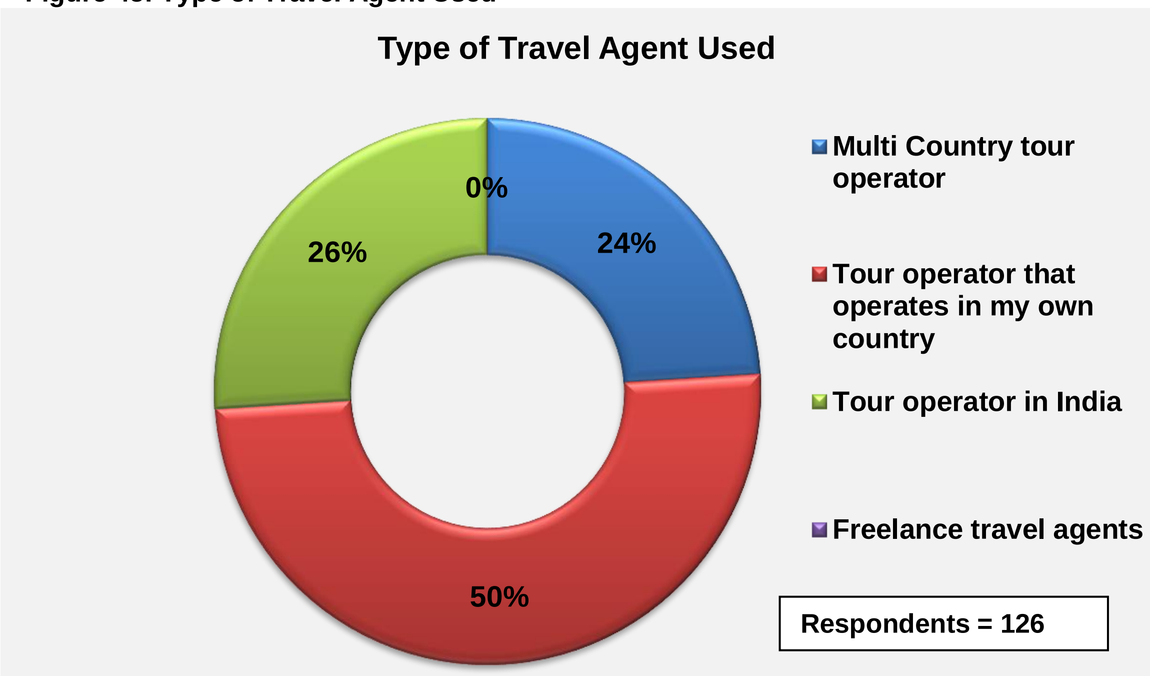
Figure 44: Reason for Taking Travel Insurance



3.1.4.14 Type of Travel Agent Used

About 50% of the total of 126 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.

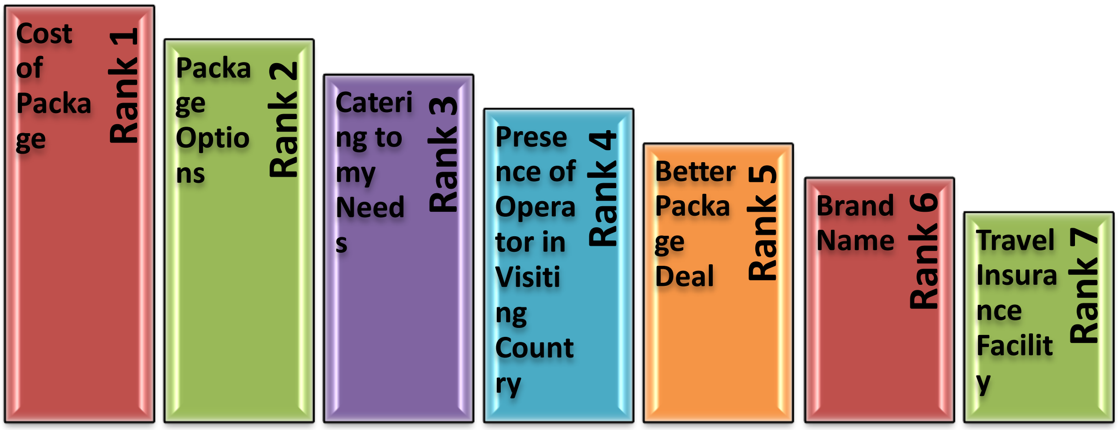
Figure 45: Type of Travel Agent Used



3.1.4.15 Selection Criteria of Tour Operators

The 126 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.

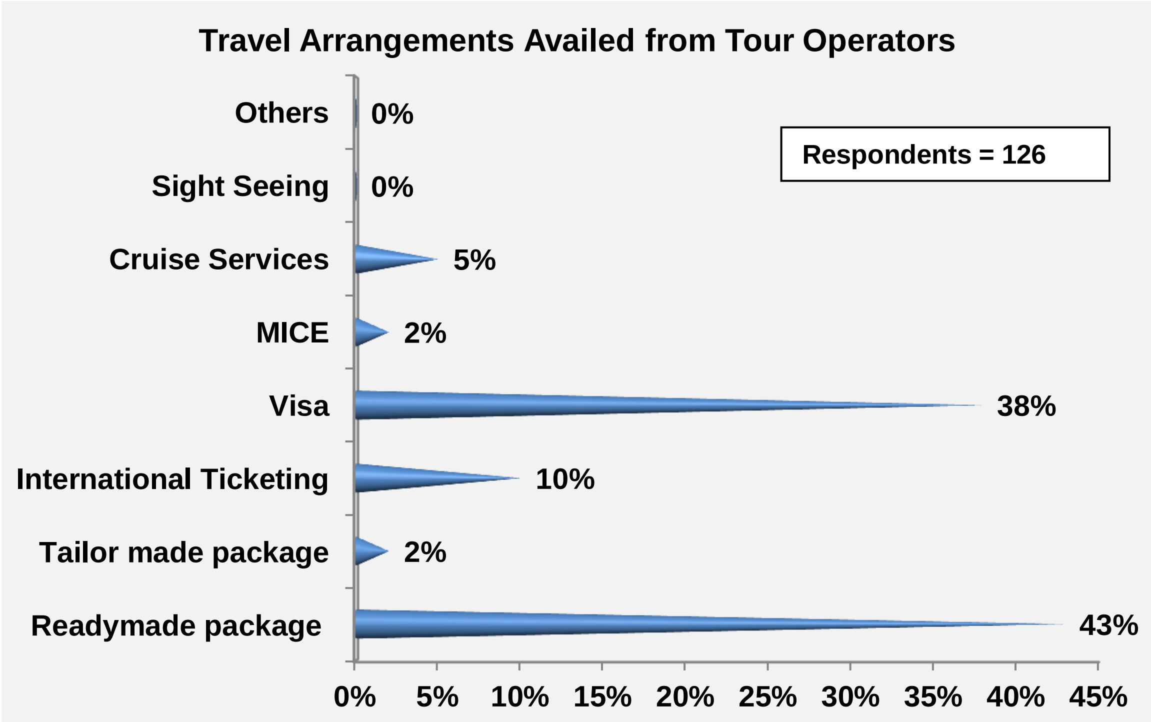
Figure 46: Selection Criteria of Tour Operators



3.1.4.16 Travel Arrangements Availed from Tour Operators

The 126 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. 43% of the total of 126 respondents mentioned that a readymade package was the arrangements availed from the tour operator.

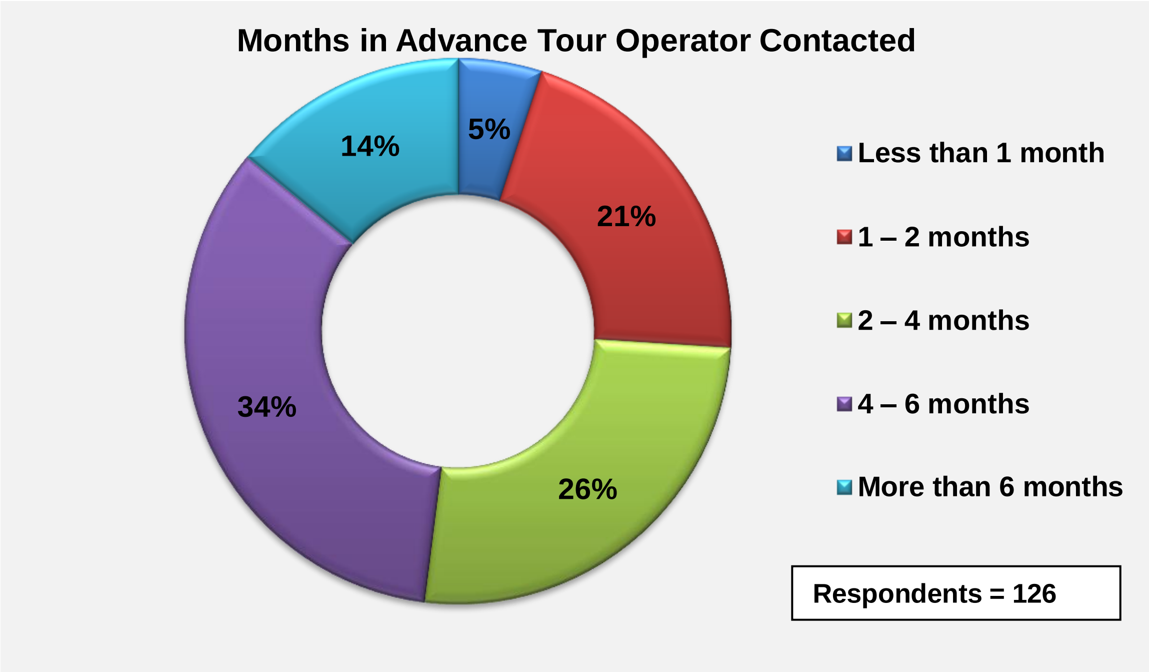
Figure 47: Travel Arrangements Availed from Tour Operators



3.1.4.17 Months before Contacted Tour Operator

The 126 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. 34% of the total of 126 respondents mentioned that they contacted the tour operator around 4 to 6 months in advance.

Figure 48: Months in Advance Tour Operators Contacted



3.1.4.18 Awareness of India as a tourist destination

About 57% of all 600 respondents who had visited other countries in the last one year were aware of India as a tourist destination.

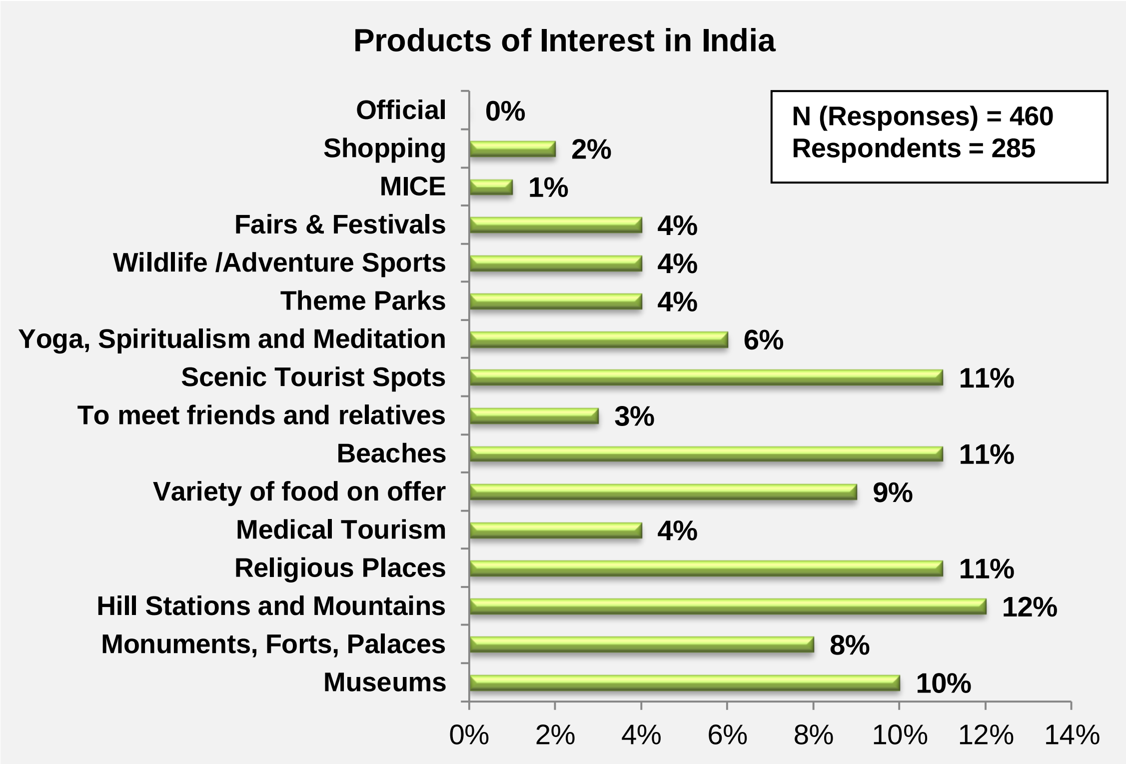
3.1.4.19 Intention of visiting India

Though 57% of the respondents (339 respondents) were aware of India as a tourist destination, only about 48% of the total 600 respondents expressed interest in visiting India during their next trip.

3.1.4.20 Primary attractions of India / motivation for visiting India

The 285 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). 460 responses were received from 285 respondents in response to this question. Most respondents admitted that they found India attractive for its monuments, forts and palaces and museums (12% of 460 responses each). Some would also like to visit the scenic tourist spots in India (11% of 460 responses).

Figure 49: Products of Interest in India



3.1.4.21 Intention and reason for choosing an intermediary for India travel

All the 600 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. 67% of the respondents showed inclination to consult a tour operator and 33% said that they would plan their own trips.

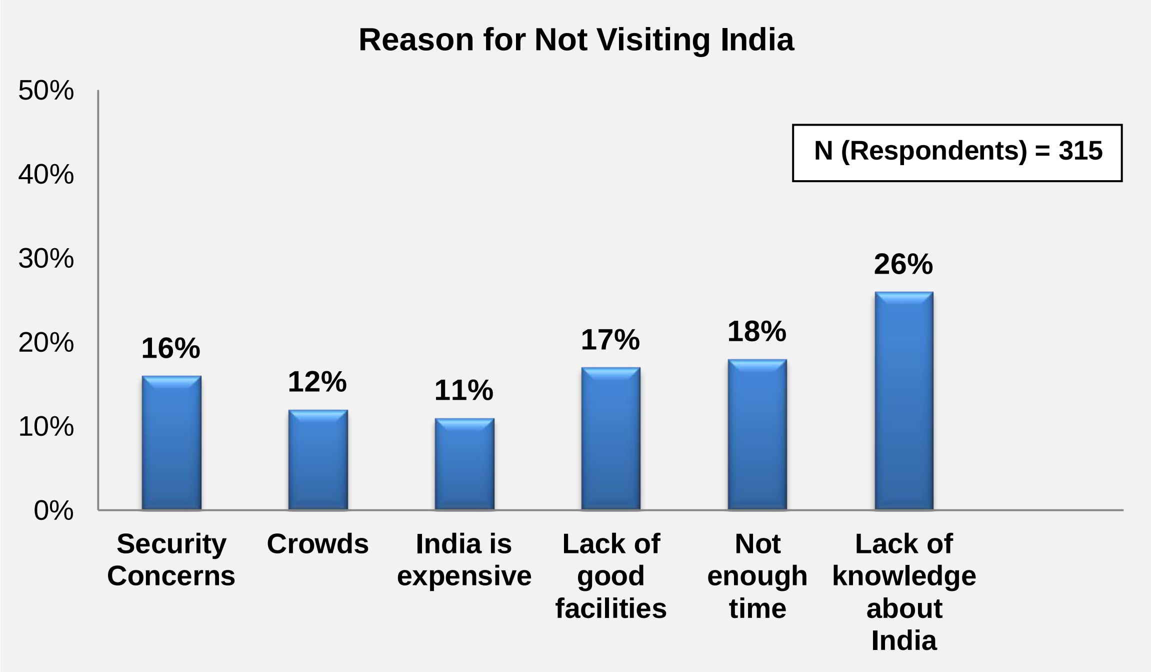
Among those willing to consult tour operators, some also offered insights into why they felt the need to avail of the services of an intermediary. 39% of responses showed that the travellers would like to approach tour operators for their experience and knowledge about India. About 24% of the responses were in favour of the safety and security that a tour operator would provide.

Figure 50: 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 (315 of 600 respondents), the primary concern that proved a dampener was crowds in India (66 of the 600 responses received in this context). Many also felt that India was expensive and has lack of facilities (17% of responses each).

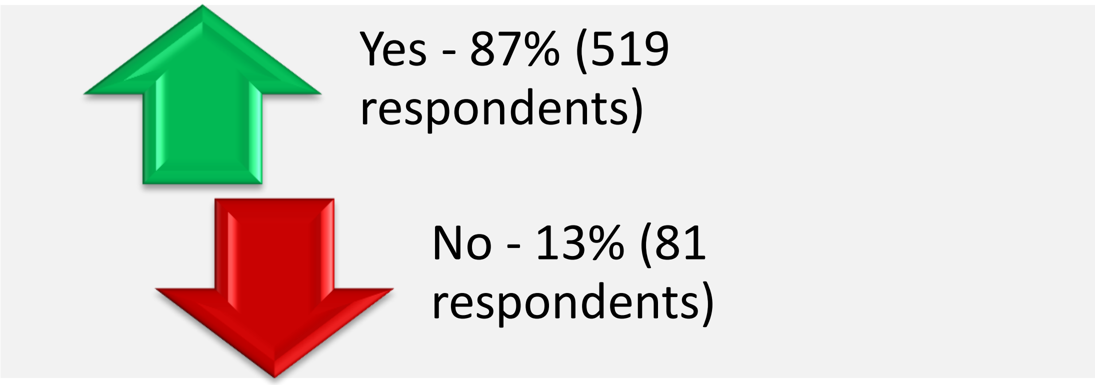
Figure 51: Reasons for Not Visiting India in Future



3.1.4.23 Visit India Ever

All 600 past travellers from South Africa to countries other than India were asked if they would ever visit India and 87% of the 600 respondents stated that they would visit India. 81 respondents out of 600 past travellers to other countries responded in the negative on ever travelling to India.

Figure 52: 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 (18%) stayed in resorts whereas travellers who headed to other countries, only 10% stayed in resorts.

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

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
18%	Resorts	10%
20%	Star Category Hotels	30%
30%	Mid-Range Hotels	35%
22%	Budget Hotels	9%
11%	Staying with Friends / Family	15%
0%	Others	1%

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

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
1100	Accommodation	1189.9
1808.5	International Travel	1439.5
547.5	Local Travel	581.5
538.8	Food including alcohol	391.8
509.5	Others	386.6
4271.8	Total	3707.6

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 (**<u>all costs in US$</u>**) than those travelling to India.

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

Past Travellers to India	Cost Categories	Past Travellers to Other Countries
1398.1	Accommodation	1203.1
1779.1	International Travel	1674.2
605.9	Local Travel	489
634.1	Food including alcohol	516.7
436.1	Others	504.7
3780.6	Total	3932.9

3.1.5.4 Preferred Mode of Payment of Past Travellers

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

Table 19: Preferred Mode of Payment of Past Travellers – India vs. Other Country

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

3.1.5.5 Trip Satisfaction of Past Travellers

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

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

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
26%	Excellent	29%
45%	Good	39%
23%	Satisfactory	28%
4%	Poor	4%
2%	Very Poor	0%

3.1.5.6 Mode of Trip Booking of Past Travellers

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

Table 21: Mode of Trip Booking of Past travellers – India vs. Other Country

Past Travellers to India	Payment Mode Categories	Past Travellers to Other Countries
40%	Self (Internet)	67%
37%	Self (Counter)	12%
23%	Travel Operator /Agent	21%

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

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
22%	Travel Portals	19%
11%	Books	8%
22%	Websites / Internet	32%
12%	Brochures on Country	5%
9%	Country Tourism office in my own country	18%
13%	Friends / Relatives	9%
10%	Past Visits	10%

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 (50% of respondents for both India and Other countries) did their bookings through tour operators based in their own country.

Table 23: Type of Travel Agent Used by Past Travellers – India vs. Other Country

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
20%	Multi Country tour operator	24%
50%	Tour operator that operates in my own country	50%

26%	Tour operator in India	26%
4%	Freelance travel agents	0%

3.1.5.9 Type of Travel Arrangements Used by Past Travellers

Among past travellers who headed to India, a large percentage (35%) sought international ticketing arrangements from tour operators whereas travellers who headed to other countries, 43% of them sought readymade packages as travel arrangements from tour operators.

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

Past Travellers to India	Accommodation Categories	Past Travellers to Other Countries
7%	Readymade package	43%
22%	Tailor made package	2%
35%	International Ticketing	10%
17%	Visa	38%
15%	MICE (Meeting, Incentives, Conventions, Exhibitions)	2%
4%	Cruise Services	5%
0%	Sight Seeing	0%
0%	Others	0%

Chapter Four

Past Outbound Traveller Study Findings

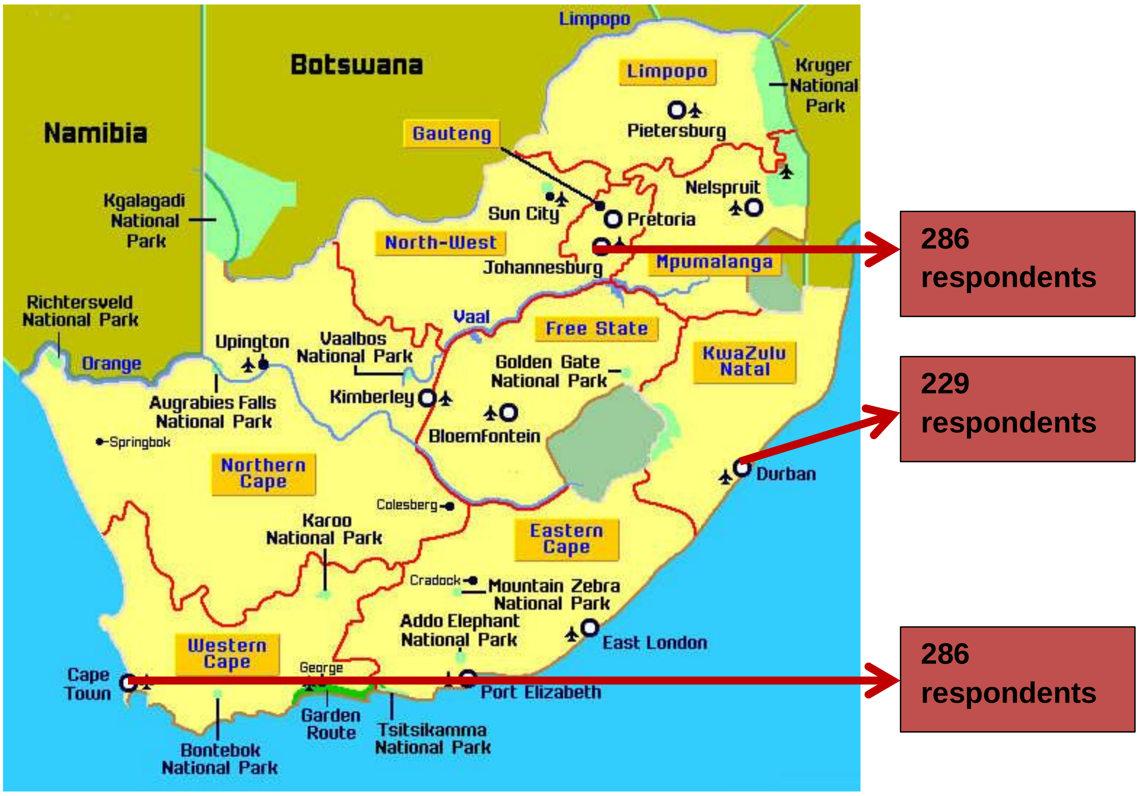
4.1 Prospective Outbound Travel Behavior

4.1.1 Profiling Information

4.1.1.1 Place of residence

The survey investigated 800 respondents (persons who are intending to travel abroad) from South Africa of which 28.6% of the travellers were from Durban and 31.25% each from Cape Town and Johannesburg.

Figure 53: Distribution of Past Travellers by Place of Residence



Map Source: www.south-africa-tours-and-travel.com

4.1.1.2 Gender Distribution

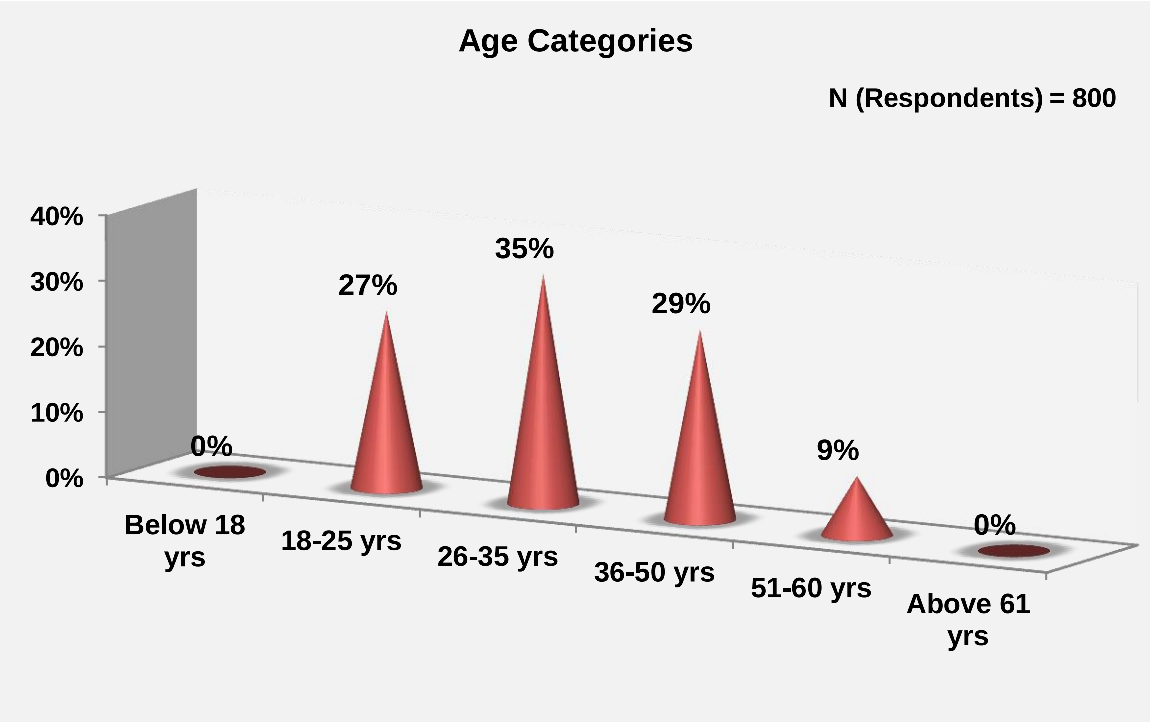
Women constituted only 14% of the total 800 survey participants of intending travellers from South Africa. Overall, 114 prospective female travellers were interviewed during the primary survey across the 3 cities.

Table 25 Respondents by gender		
Gender	No. of respondents	Percentage
Male	686	86%
Female	114	14%
Total	**800**	**100%**

4.1.1.3 Age categories

35% of the respondents, that is, 279 respondents were between 26 to 35 years of age. 29% of the respondents were in the age group of 36 to 50 years. Overall, 91% of the respondents were in their peak productive years between 26 and 50 years of age.

Figure 54: Age Categories



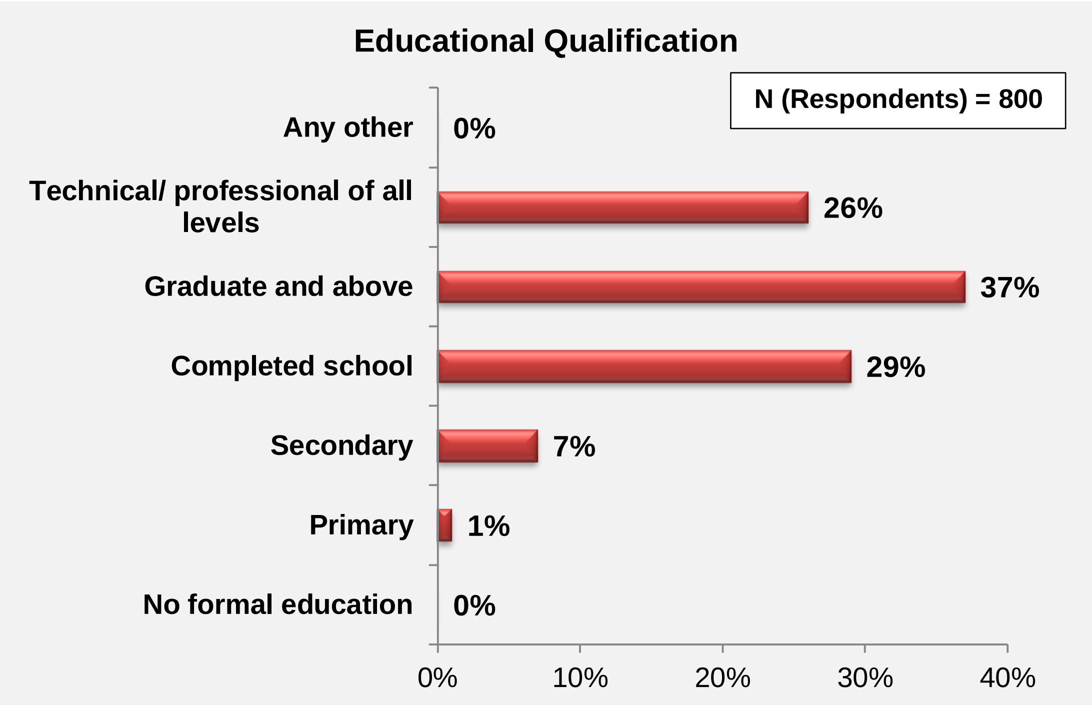
4.1.1.4 Employment status

All 800 respondents were employed full time.

4.1.1.5 Educational Qualifications

About 63% of the 800 respondents were at least graduates or had some technical or professional qualification. Less than 30% of the respondents had completed Higher Secondary schooling. So overall, the respondent universe was well-educated and aware.

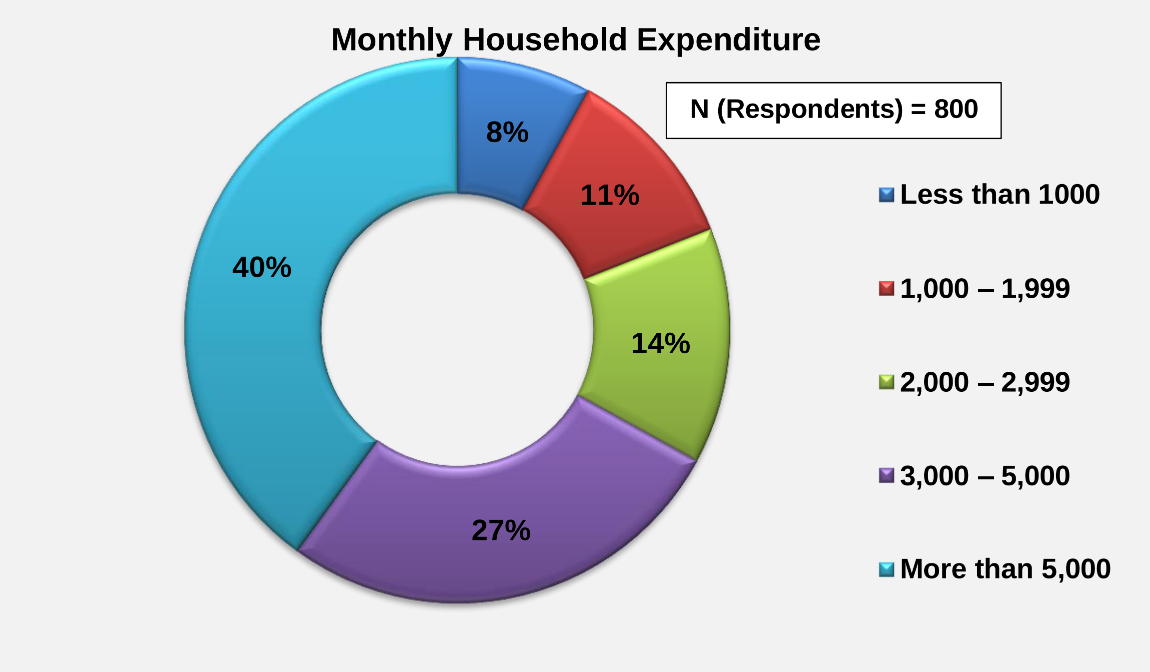
Figure 55: Educational Qualification



4.1.1.6 Household Expenditure per month

40% of the respondents mentioned that their monthly household expenditure was more than USD 5000.

Figure 56: Monthly Household Expenditure

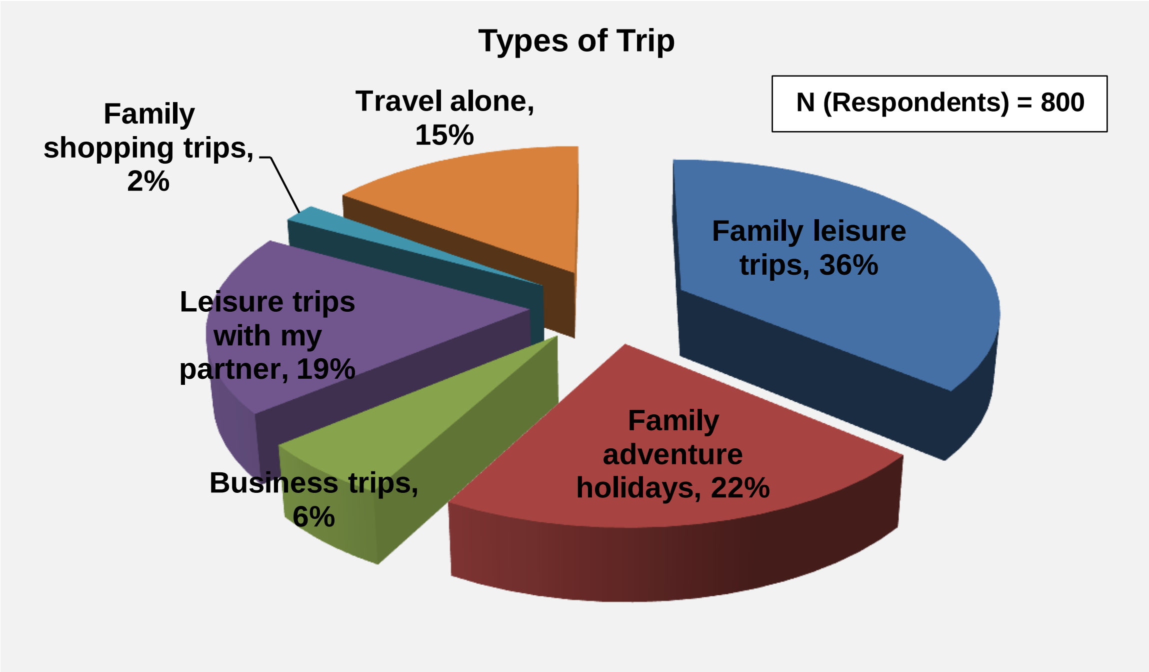


4.1.2 General Travel Behaviour

4.1.2.1 Types of trip

More than half the respondents wish to primarily go on family leisure trips and family adventure holidays. A considerable section also intends to go for solo trips (15%, that is, 117 of 800 respondents) and leisure trip with spouse or partner (151 of 800 respondents).

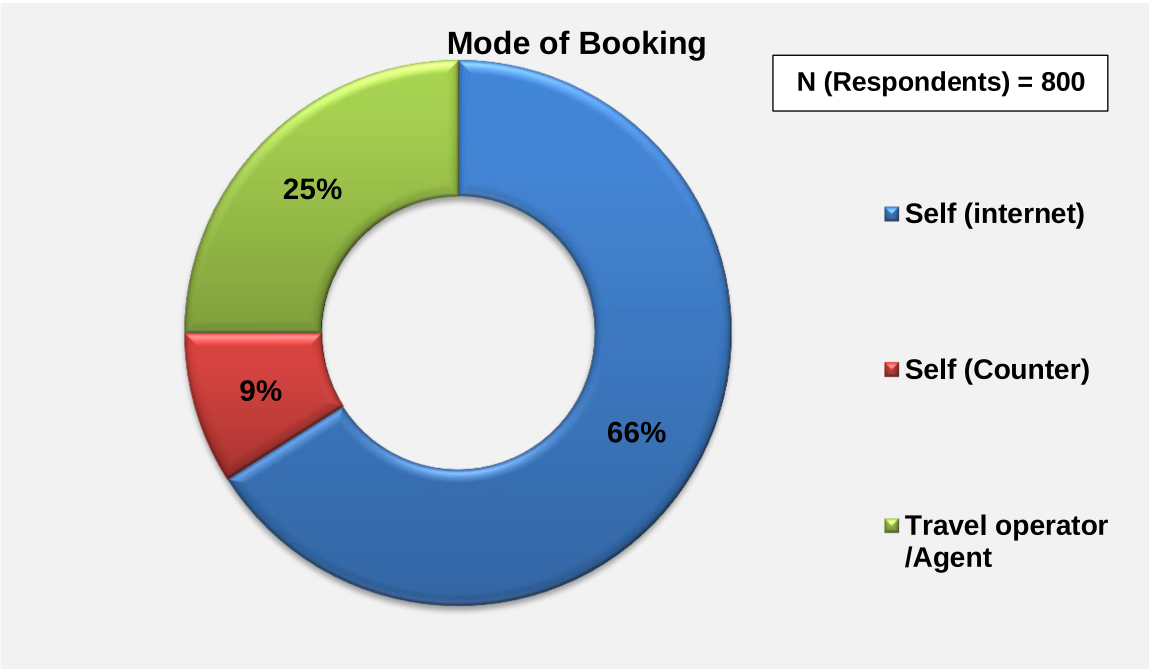
Figure 57: Respondents by purpose of travel



4.1.2.2 Mode of booking

66% (533 of 800) respondents mentioned that they would book their tickets over the internet while 25% (196 of 800) expressed the intention of approaching travel agents. 71 of the 800 respondents said that they would book their tickets themselves at the counter.

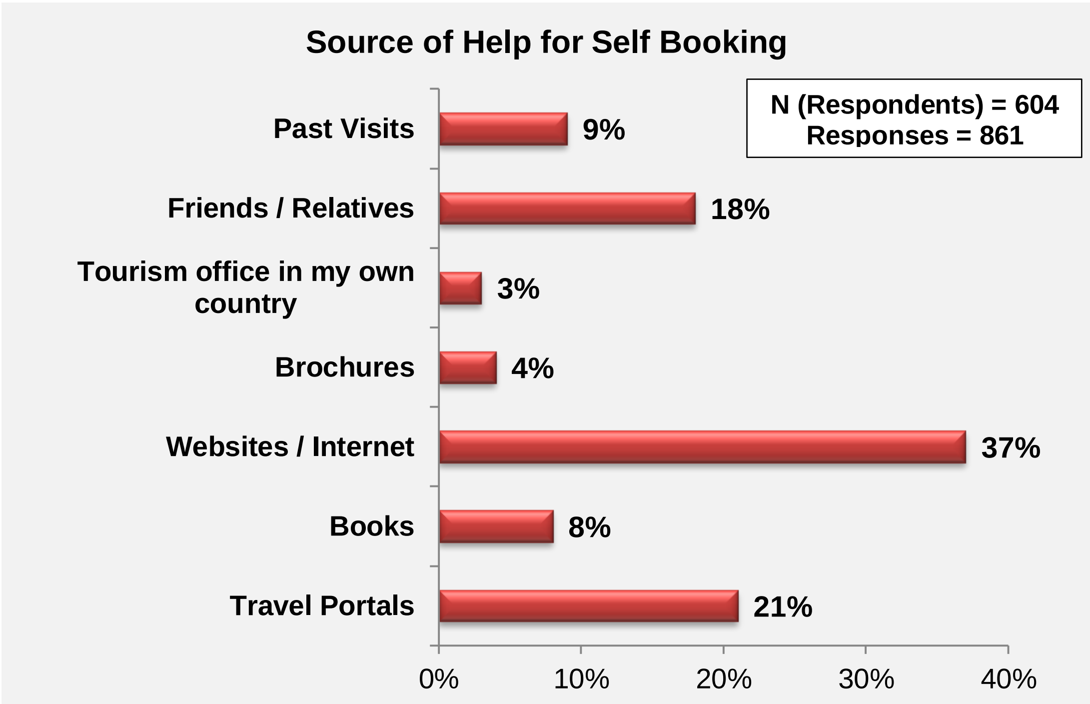
Figure 58: Mode of Booking



4.1.2.3 Sources of help for booking information

The 604 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). 37% of the 861 responses received revealed that the internet was a very important source of information for travellers as well as a powerful tool for sorting out travel modalities. 18% responses showed that on occasion friends and relatives could also be consulted.

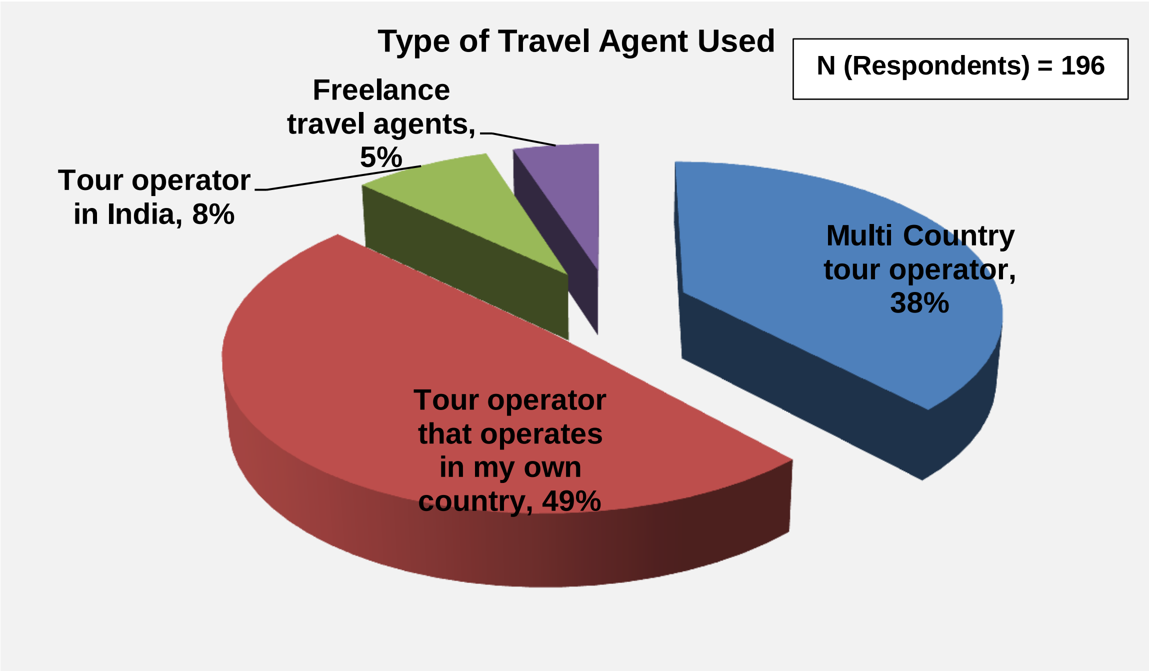
Figure 59: Sources of booking information



4.1.2.4 Type of tour operator used

Among those intending to approach tour operators for ticketing assistance, 49% said that they would approach operators from the South Africa. Another 38% were willing to approach multi-country operators. Only 8% mentioned that they would approach tour operators from India.

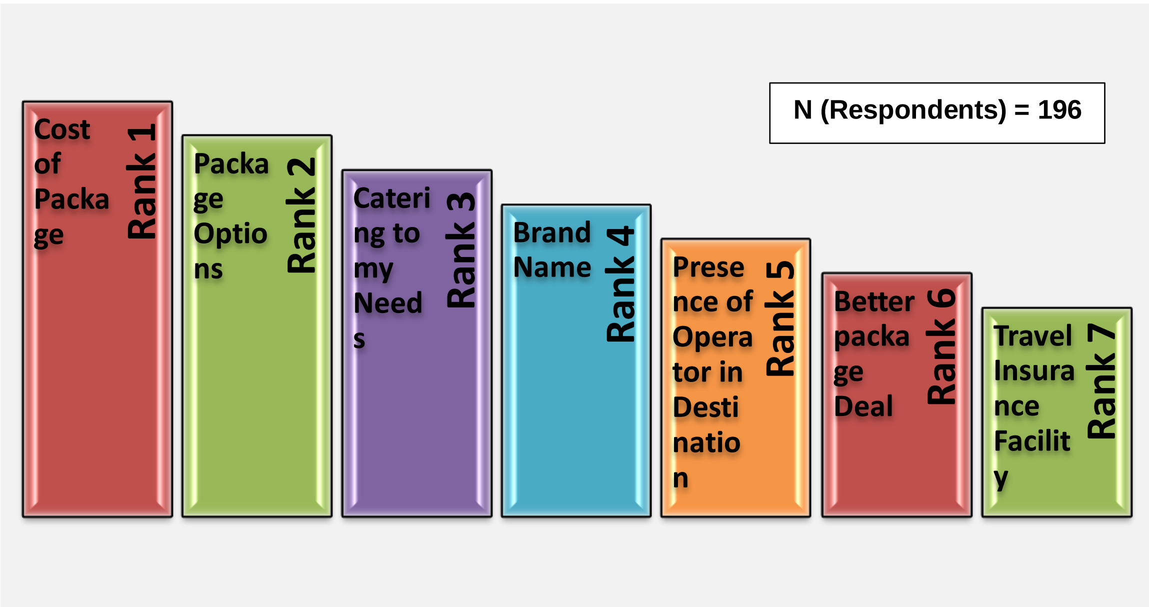
Figure 60: Type of Travel Agent Used



4.1.2.5 Tour operators selection criteria

For these 196 respondents, the cost of package was an important decision point in selecting the tour operator. This was followed by the package options. Travel insurance was the last priority in the decision making process.

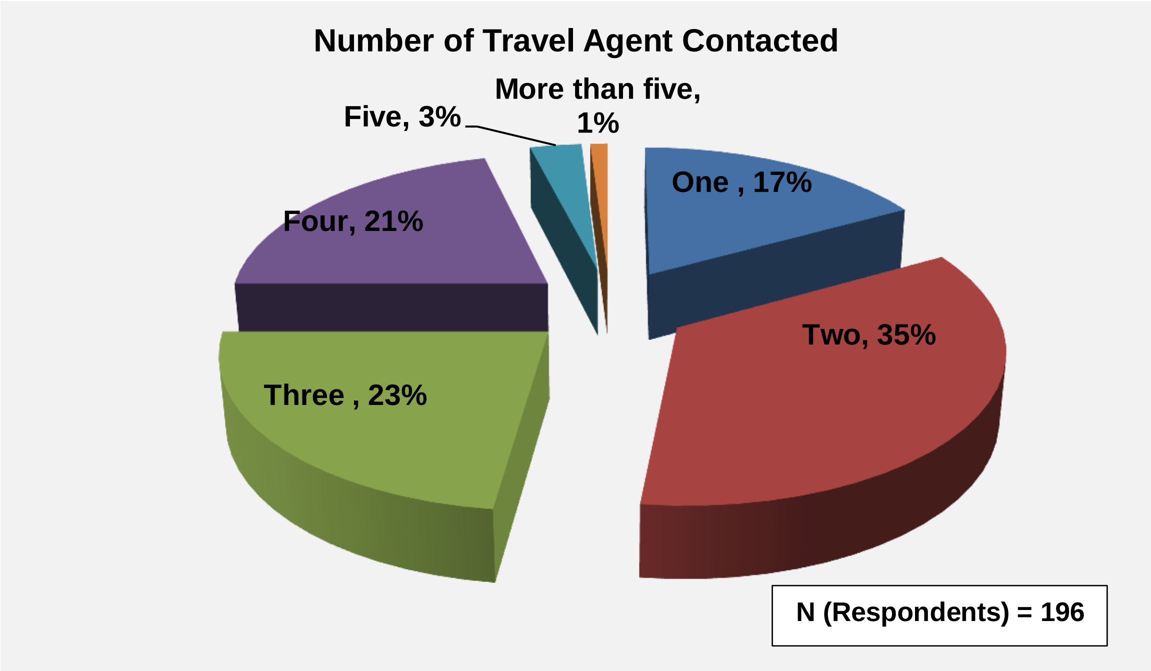
Figure 61: Tour Operator Selection Criteria



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

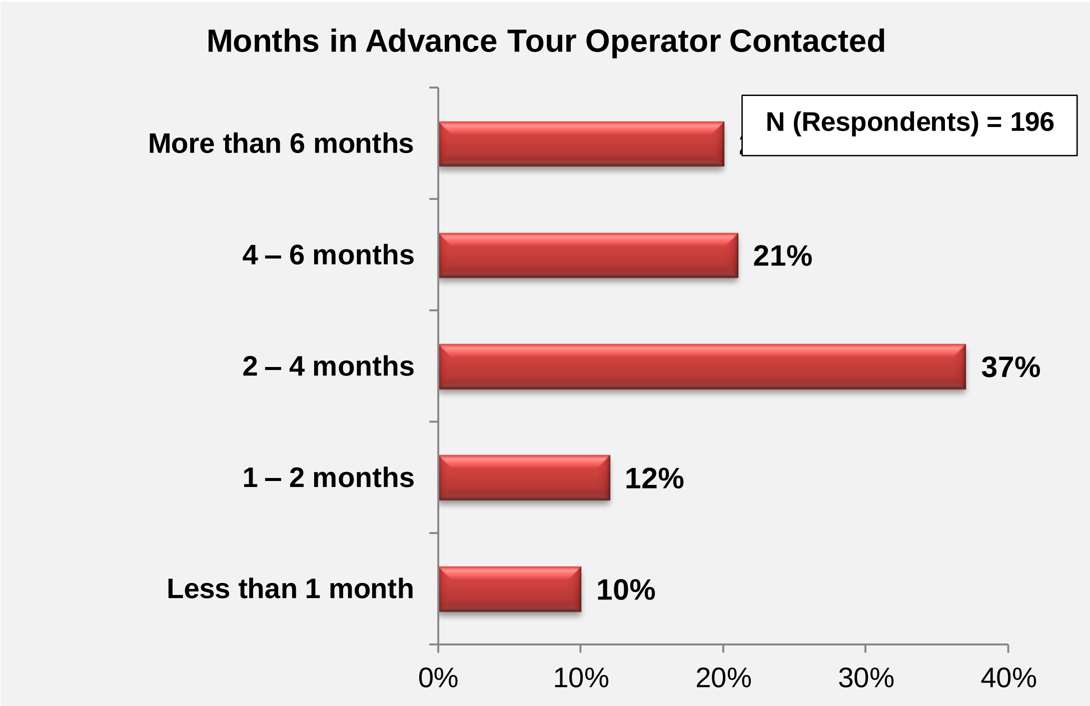
Of the 196 respondents who mentioned that they would approach tour operators, 35% said that they would contact at least 2 operators before reaching a decision. 23% expressed the intention of approaching 3 or more operators before they took a decision.

Figure 62: No. of tour operators the respondents intended to contact before coming to a decision



37% respondents mentioned that they would contact the travel operator at 2 to 4 months in advance. 21% respondents displayed intention of connecting with the tour operator 4 to 6 months in advance.

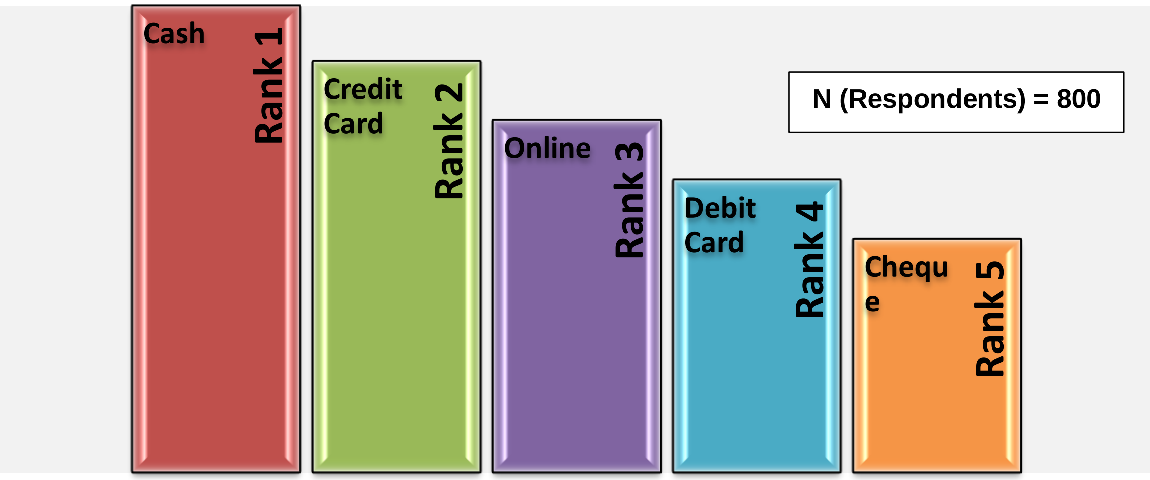
Figure 63: Months in Advance Tour Operator Contacted



4.1.2.7 Mode of payment preferred

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

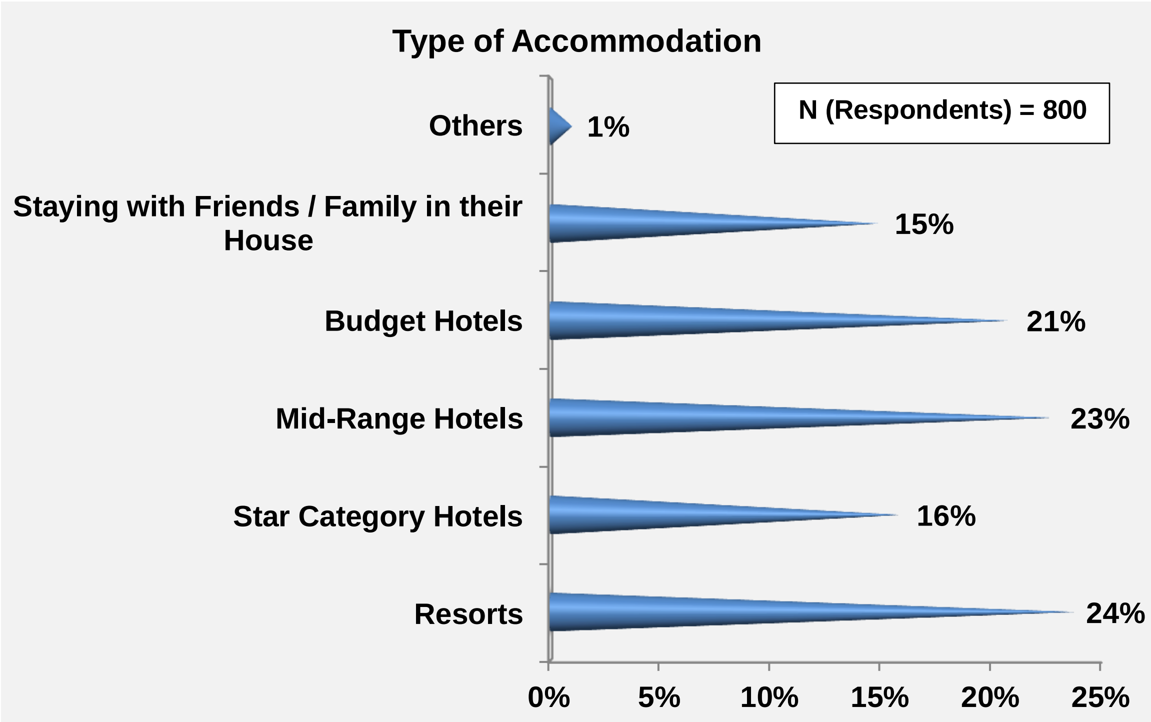
Figure 64: Mode of Payment Preferred



4.1.2.8 Type of accommodation to be availed

The 800 prospective travellers were questioned about the type of accommodation that they would prefer during their trip. About 24% prospective travellers were willing to look at resorts rather than star category hotels (130 of 800 respondents chose starred hotels) while another 23% stated that mid-range hotels would be their preferred accommodation.

Figure 65: 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 66: Expenditure across cost baskets

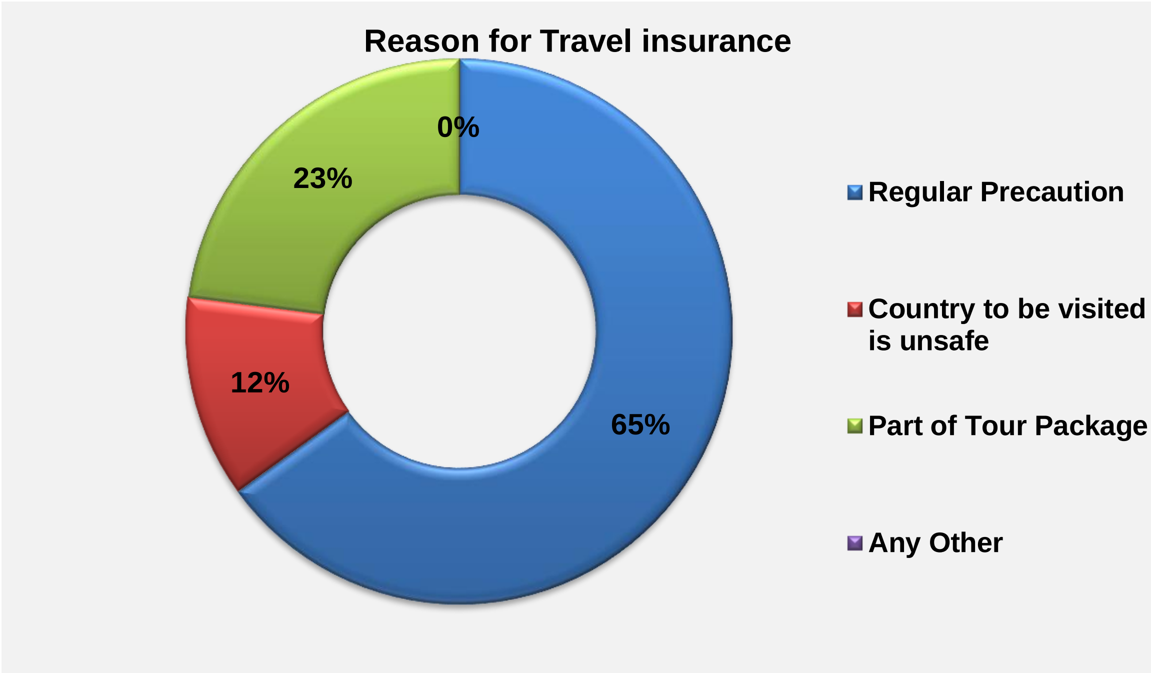
N (Respondents) =800

Package Cost	Cost Heads	Non-package Cost
USD 1211.6	Accommodation	USD 1240.6
USD 1779.5	International Travel	USD 1967.5
USD 613.5	Local Travel	USD 664.8
USD 744.4	Food & Alcohol	USD 677.1
USD 546.2	Other	USD 604.7
USD 4399	Total	USD 4246.8

4.1.2.10 Reason for availing travel insurance if any

67% of prospective travellers (800 respondents) wished to opt for travel insurance. Majority (65%) said that this was part of regular precaution they took while travelling.

Figure 67: Reason for Opting of Travel Insurance


Reason for Travel insurance
0%
23%
12%
65%
Regular Precaution
Country to be visited is unsafe
Part of Tour Package
Any Other

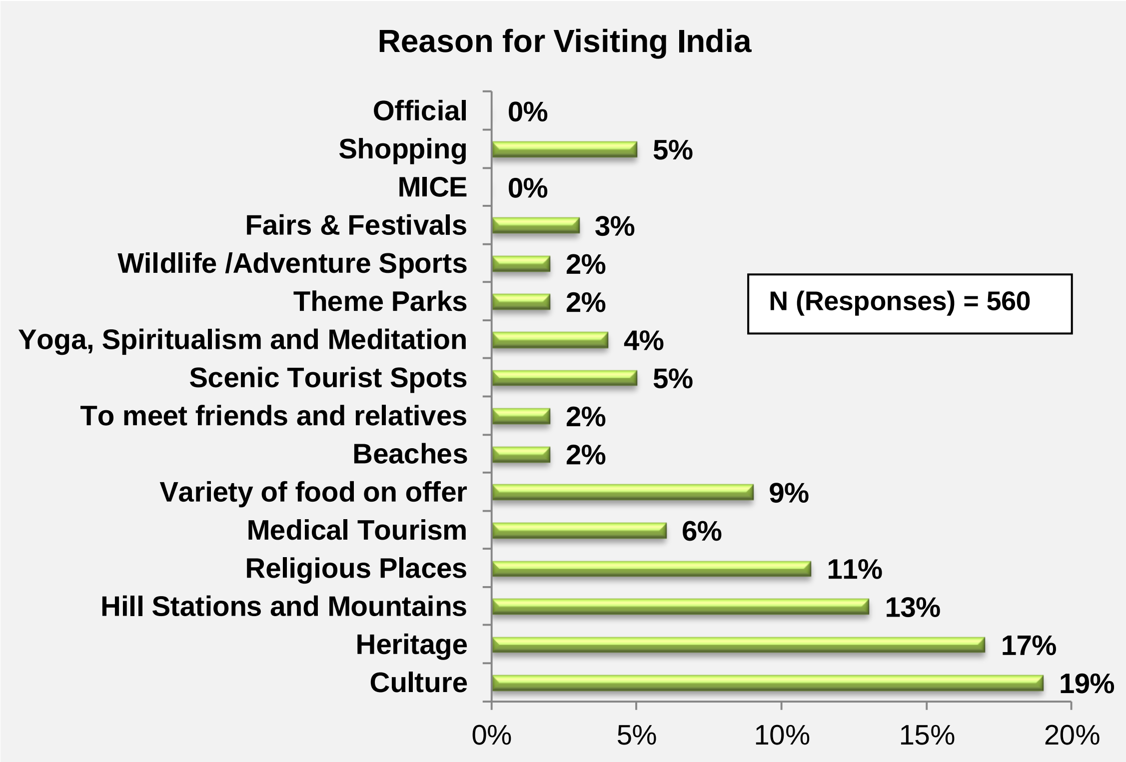
4.1.3 Travel Behaviour of Prospective Visitors to India

Of the 800 prospective travellers interviewed, 200 expressed the intention of visiting India in the near future.

4.1.3.1 Reason for choosing India as a travel destination

Respondents were asked to share their reasons for choosing India as a travel destination and they were given the freedom to choose multiple options. A total of 560 responses were received from the 200 respondents of which 19% responses indicated the desire to see the culture of India as the driving reason.

Figure 68: Reason for choosing India for next trip



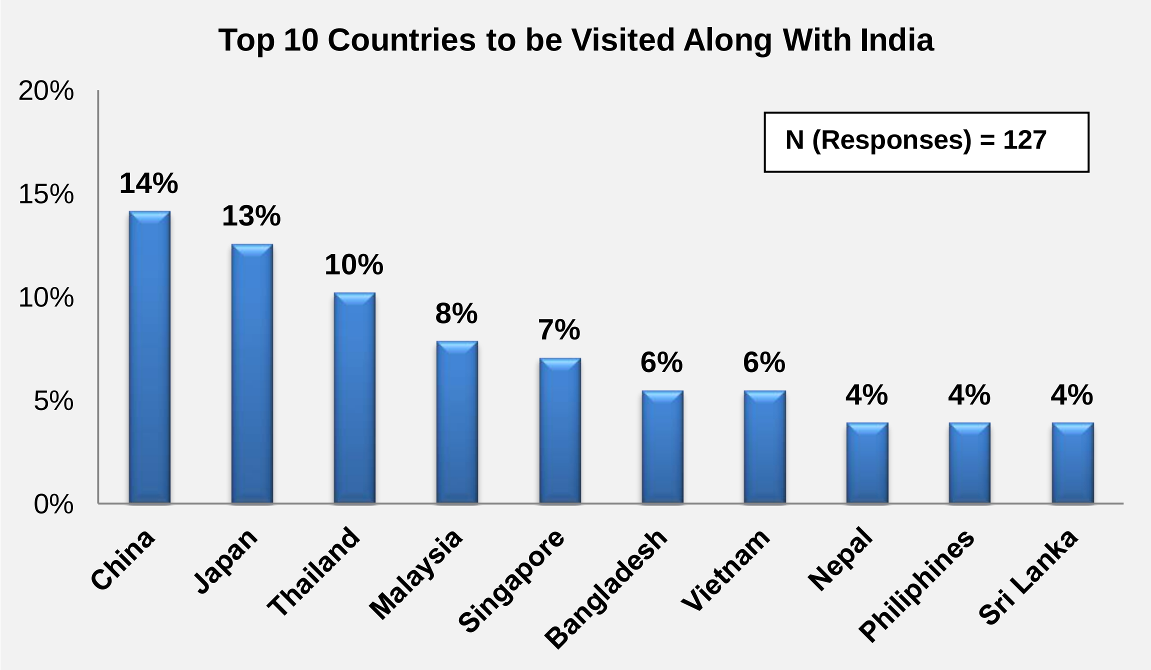
4.1.3.2 Intention of visiting only India or as part of a sub-regional trip

67% of these 200 respondents intended to visit India only and not as part of a regional tour to South Asia.

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

14% of these 67 respondents intended to visit India as part of a regional tour to South Asia mentioned China in their schedule.

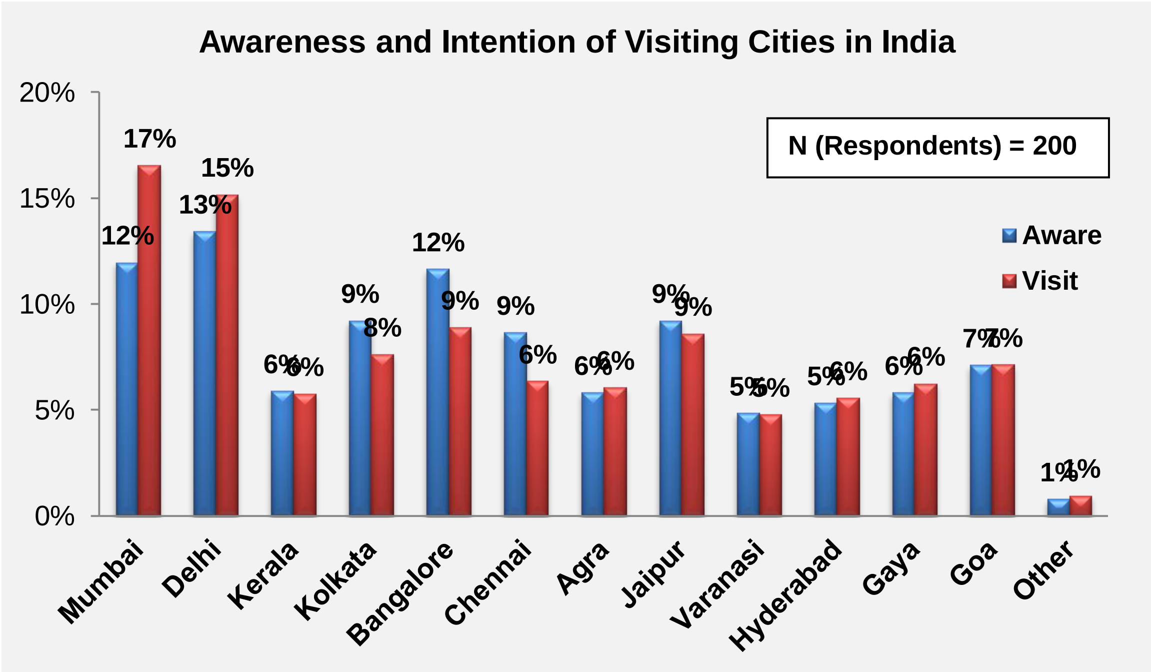
Figure 69: Top 10 Countries to be Visited along with India



4.1.3.4 Awareness and intention of visiting destinations in India

The 200 respondents were queried about the cities they were aware of and planning to visit during their next trip. The destinations travellers were most aware of were revealed to be Delhi, Mumbai and Bangalore. Examination of the responses shows 15% of the persons wanted to visit Delhi while 17% wanted to visit Mumbai.

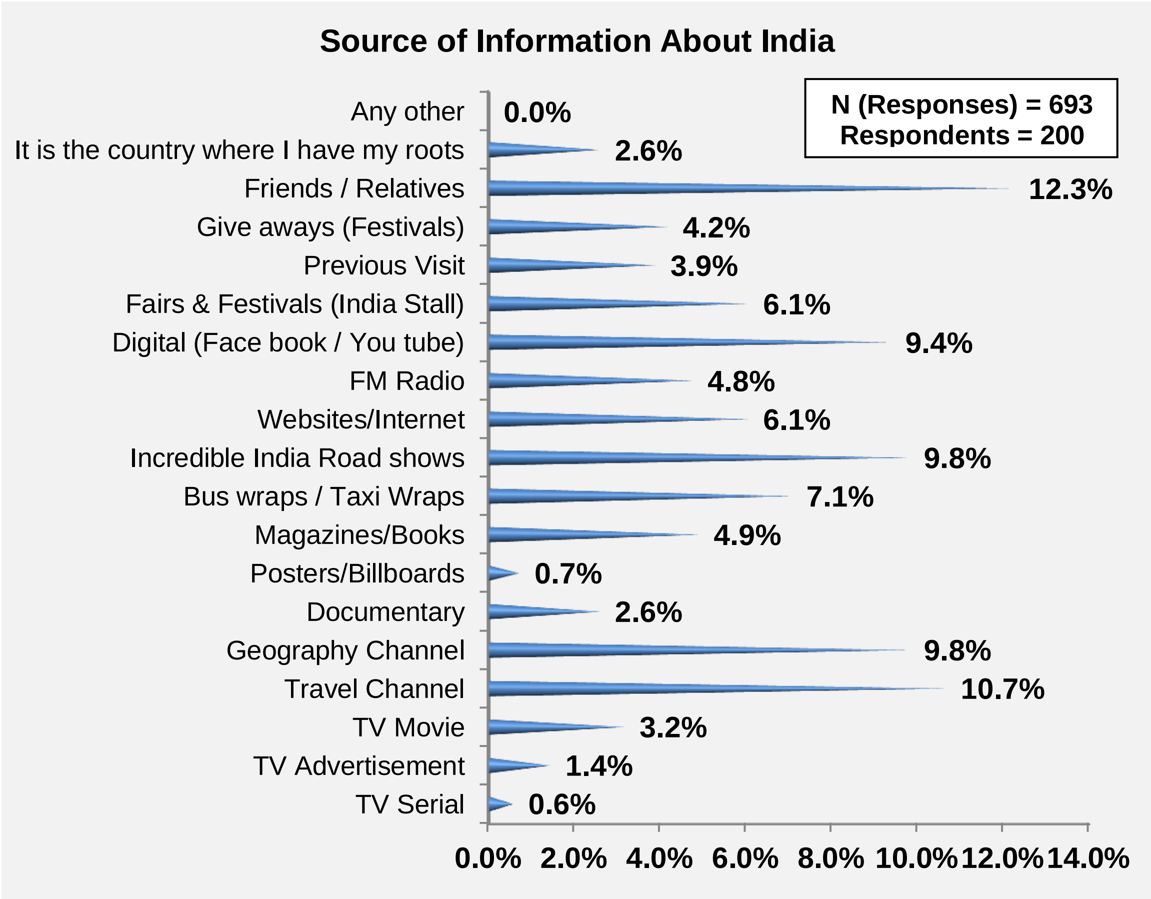
Figure 70: Awareness about a destination and its traction for the visitor



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 friends and relatives; about 12% of responses received indicated this (85 of 693 responses). 11% of all responses indicated that travel channels were an important source of information.

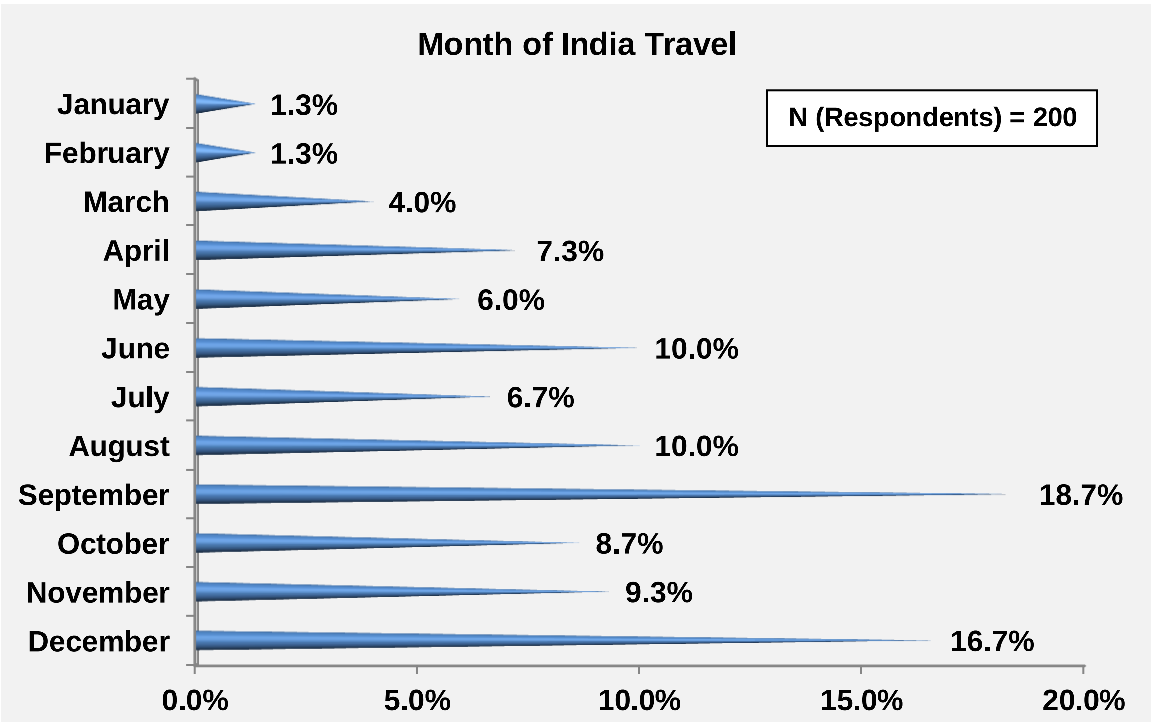
Figure 71: Sources of information about India



4.1.3.6 Time of visit to India

The most popular month for travel is September, followed by December.

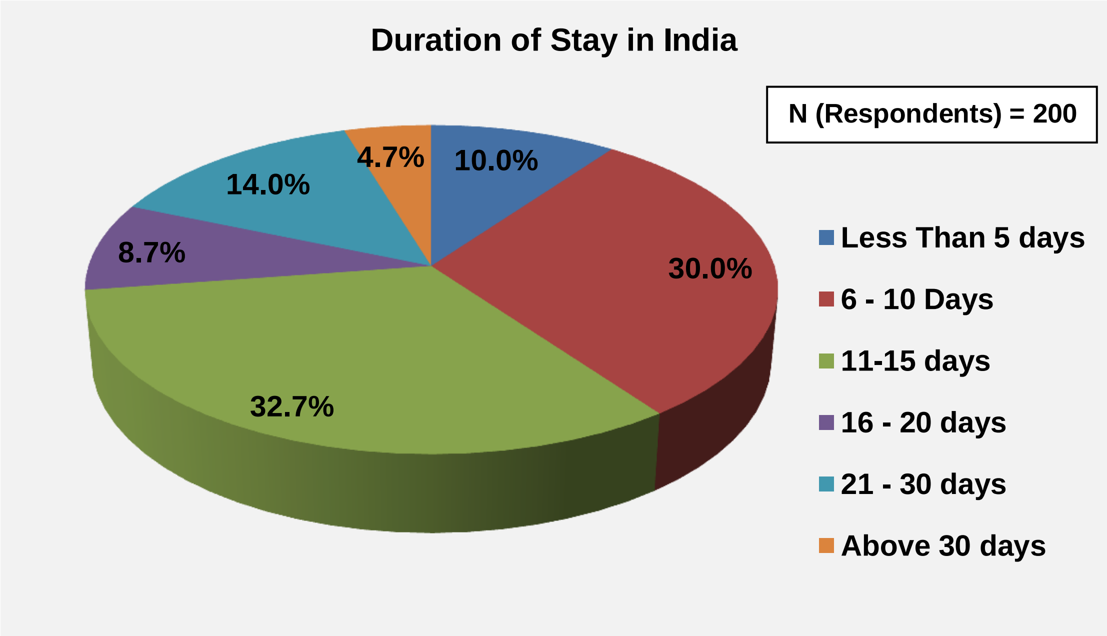
Figure 72: Preferred month for potential visit to India



4.1.3.7 Duration of stay

33% of the 200 respondents intend to stay for a period o11 to 15 days in India. 30% intended to stay for 6 to 10 days.

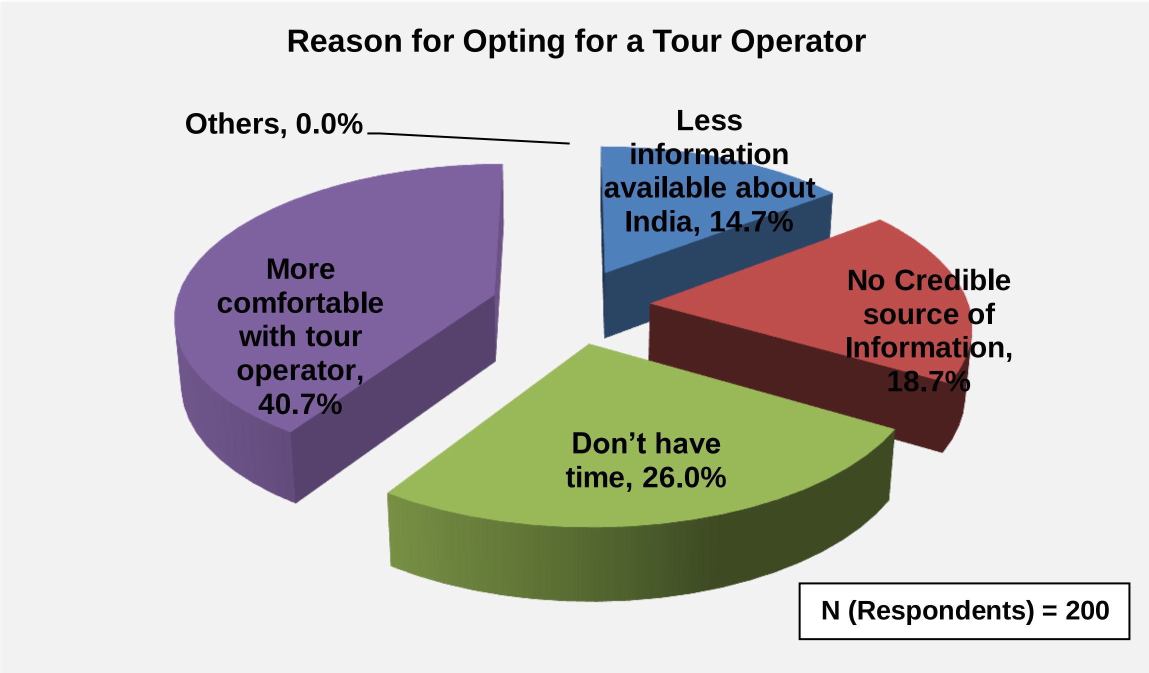
Figure 73: Duration of Stay in India



4.1.3.8 Reason for booking through a tour operator while visiting India

From the 200 respondents who planned to come to India in their next visit, 40.7% of the respondents mentioned they were more comfortable with tour operator for their India trip.

Figure 74: Reason for Opting for a Tour Operator



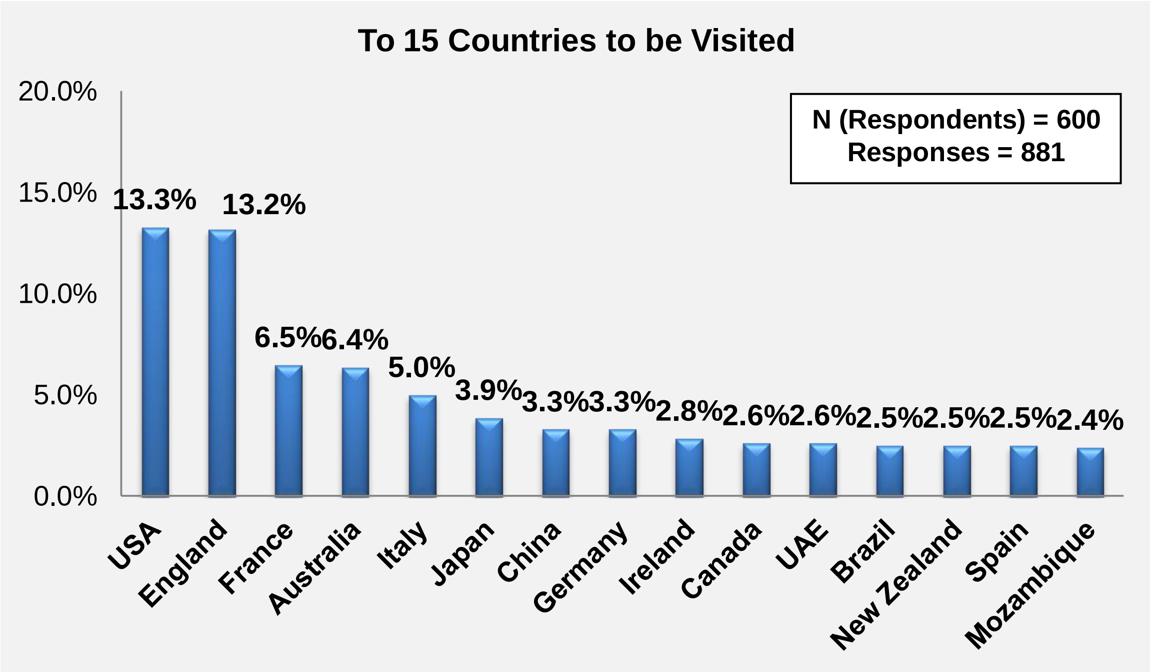
4.1.4 Travel Behaviour of Prospective Visitors to Other Countries

Of the 800 prospective travellers interviewed, 600 expressed the intention of visiting countries other than India in the near future.

4.1.4.1 Countries to visit

Among these 600 respondents, top favoured destinations were USA, England, France, Australia, and Italy.

Figure 75: Favored destinations for those intending to travel to countries other than India



4.1.4.2 Drivers / reasons for visiting foreign locales

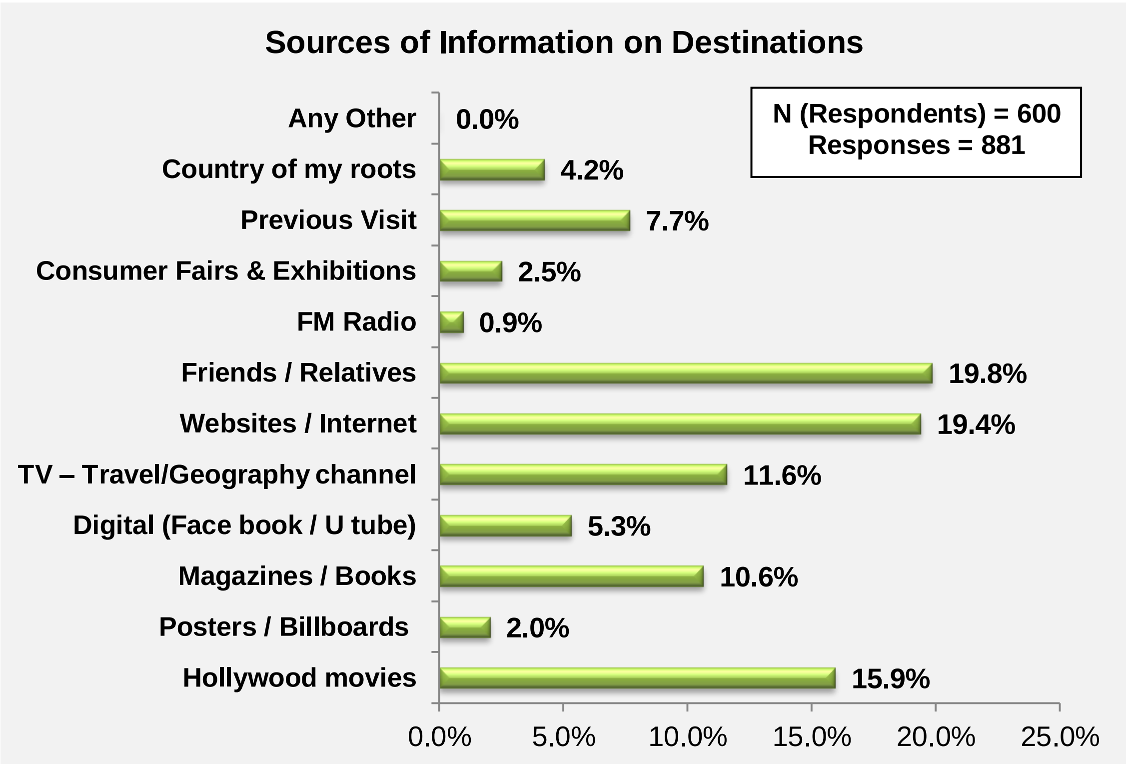
Respondents were asked the main reasons why they intended to travel overseas in the near future. The top most reason for travel was cited as leisure/recreation (60.5% respondents of 600). The other important driver was visiting friends & relatives (19.5% of 600 respondents).

Figure 76: 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. 1280 responses were yielded by 600 respondents. Important sources of information regarding destination countries are friends and relatives followed by the internet— 19.8% and 19.4% of responses respectively.

Figure 77: Sources of information about destination countries



4.1.4.4 Awareness of India as a tourist destination

61% of 600 respondents were aware of India as a potential destination before they took their decision to head elsewhere.

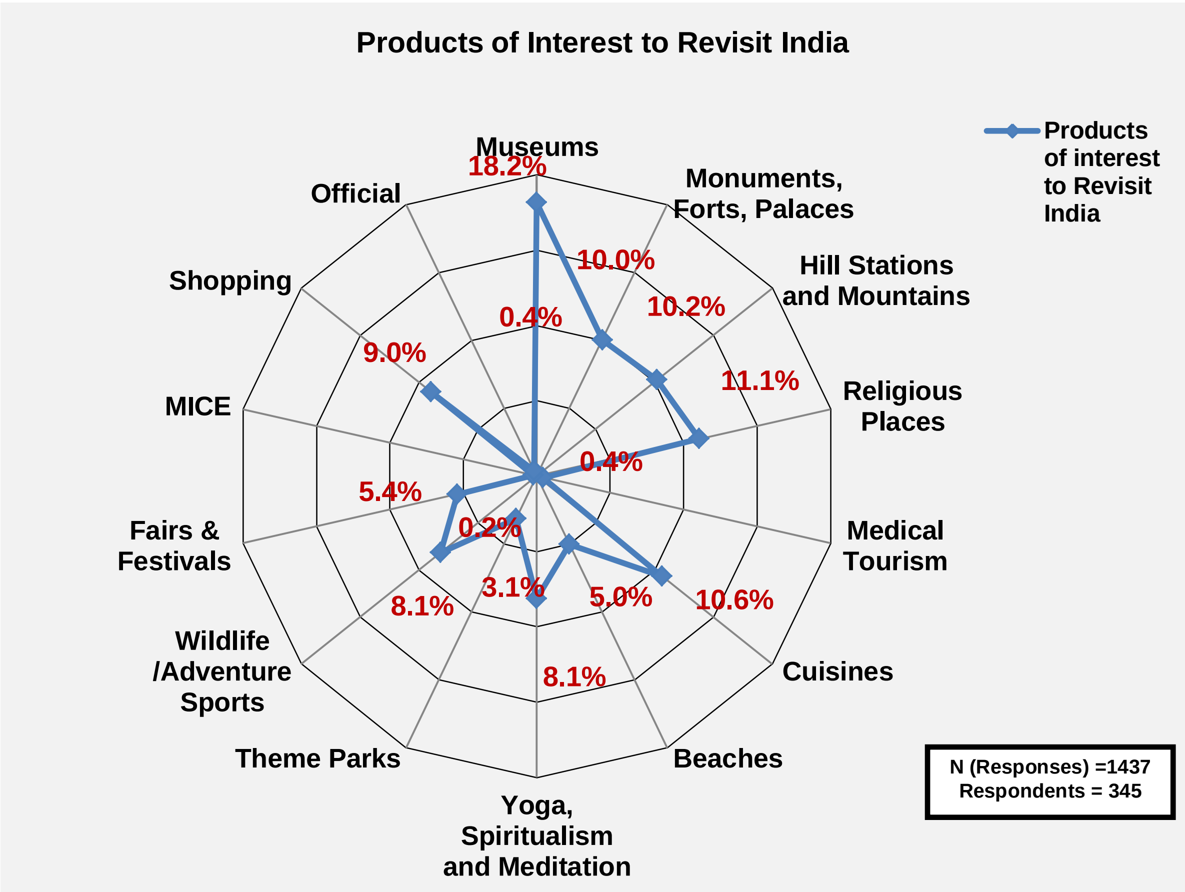
4.1.4.5 Intention of visiting India

About 58% of the 600 respondents expressed their intention to visit India next time. 255 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 345 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 1437 responses as multiple options were permitted. They evinced interest in India's museums as the most attractive motivation (18.2% of responses).

Figure 78: Primary attractions in India

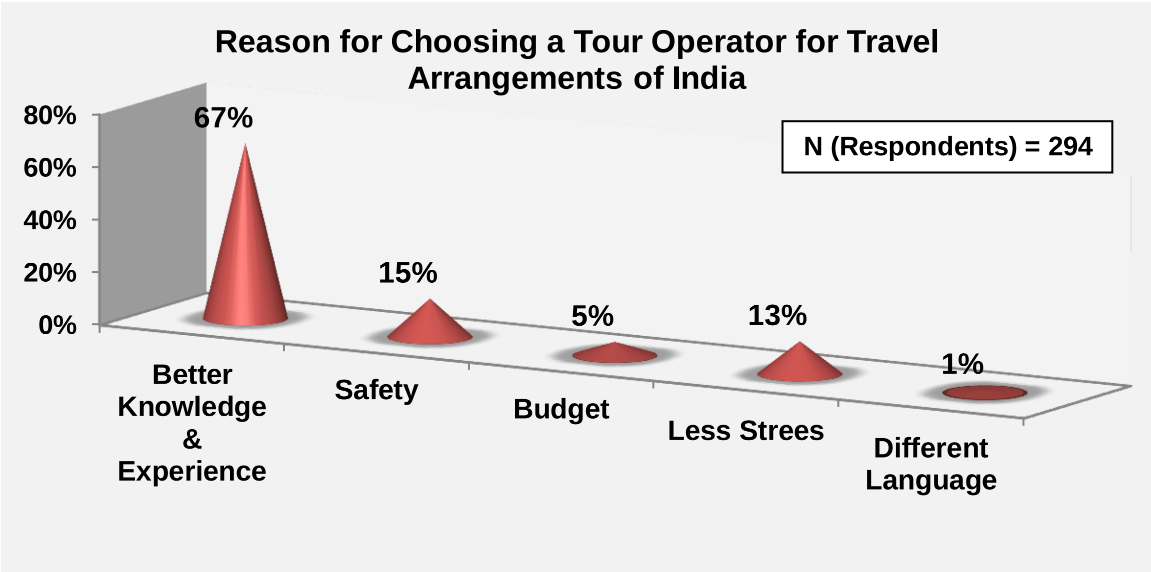


4.1.4.7 Intention and reason for choosing an intermediary for India travel

51% of the total 600 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 600 respondents, 294 persons expressed their intention of hiring a tour operator.

67% felt that the intermediary would provide better information about India and has more experience of India. Another 15% felt that going through a tour operator would provide relevant safety of trip.

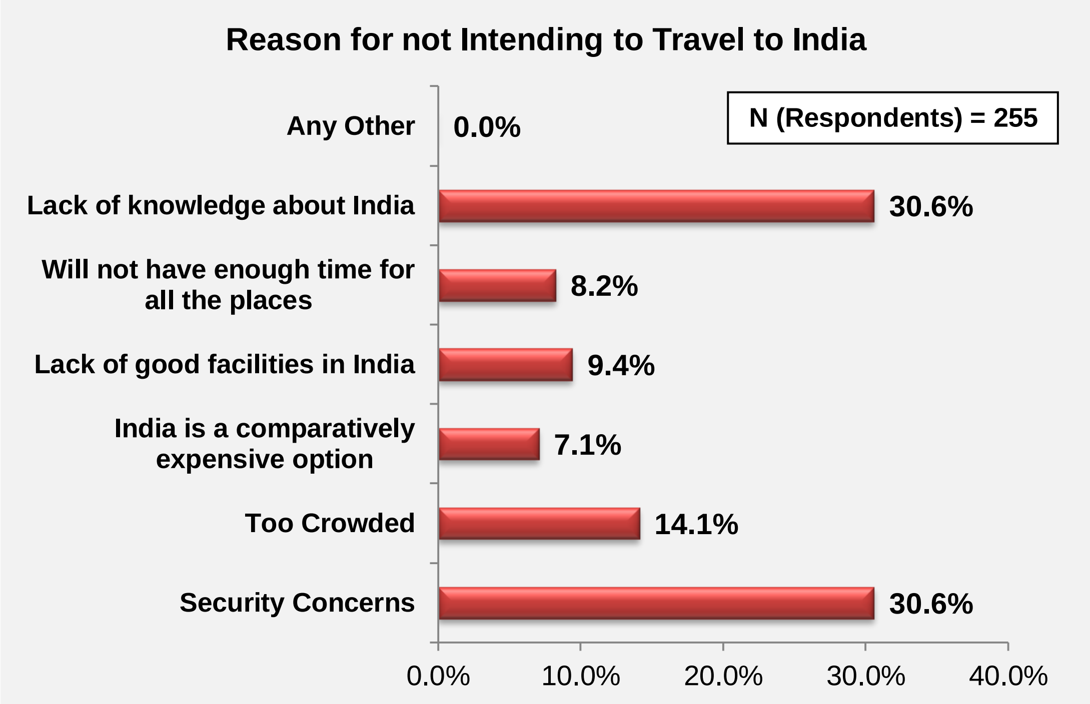
Figure 79: Reason for Choosing a Tour Operator for Travel Arrangements in India



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

The 255 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 lack of knowledge about India and equally to safety and security concerns in India (30.6% respondents each).

Figure 80: Reasons for not intending to travel to India



But 81% 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 (29%) stayed in mid-range hotels whereas travellers who headed to other countries, only 19% stayed in mid-range hotels.

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

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
21%	Resorts	27%
17%	Star Category Hotels	16%
29%	Mid-Range Hotels	19%
25%	Budget Hotels	17%
8%	Staying with Friends / Family	21%
1%	Others	2%

4.1.5.2 Package Expenses of Intending Travellers

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

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

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
1199	Accommodation	1221.4
1714	International Travel	1829.5
650.8	Local Travel	585.8
769.7	Food including alcohol	723.9
524.7	Others	564
4450	Total	4360.3

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

Intending Travellers to India	Cost Categories	Intending Travellers to Other Countries
1188.8	Accommodation	1280.6
2094	International Travel	1865.5
651	Local Travel	677
665.7	Food including alcohol	686
676.6	Others	542
4571.25	Total	4006.4

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 cash followed by credit card.

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

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

4.1.5.5 Mode of Trip Booking of Intending Travellers

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

Table 30: Mode of Trip Booking of Intending travellers – India vs. Other Country

Intending Travellers to India	Payment Mode Categories	Intending Travellers to Other Countries
68%	Self (Internet)	66%
9%	Self (Counter)	9%
23%	Travel Operator /Agent	26%

4.1.5.6 Source of Booking Information for Intending Travellers

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

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

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
21%	Travel Portals	21%
6%	Books	9%
35%	Websites / Internet	39%
8%	Brochures on Country	3%
4%	Country Tourism office in my own country	2%
16%	Friends / Relatives	19%
10%	Past Visits	7%

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 (47% and 50% of respondents for India and Other countries respectively) did their bookings through tour operators based in their own country.

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

Intending Travellers to India	Accommodation Categories	Intending Travellers to Other Countries
32%	Multi Country tour operator	42%
47%	Tour operator that operates in my own country	50%
12%	Tour operator in India	6%
9%	Freelance travel agents	2%

Chapter Five

India Tourism Office Findings

5.1 India Tourism Office

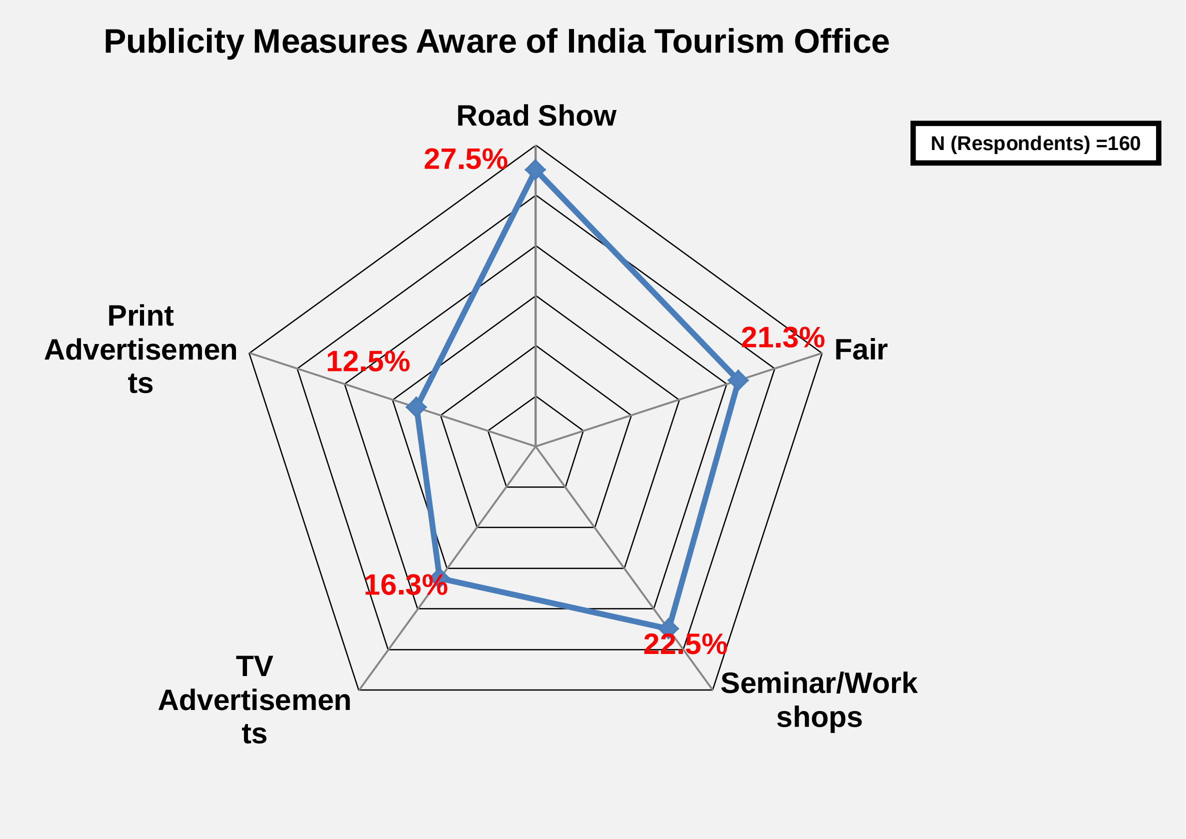
5.1.1 India Tourism Activity Response of Past Travellers

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

40% of the 600 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 67% were also aware about its promotional campaigns. They had learnt of India Tourism Offices from promotional campaigns disseminated through road shows (27.5% of 160 respondents), Seminar/ workshops (22.5% of respondents), Fairs (21%) and TV advertisements (16% of 160 respondents).

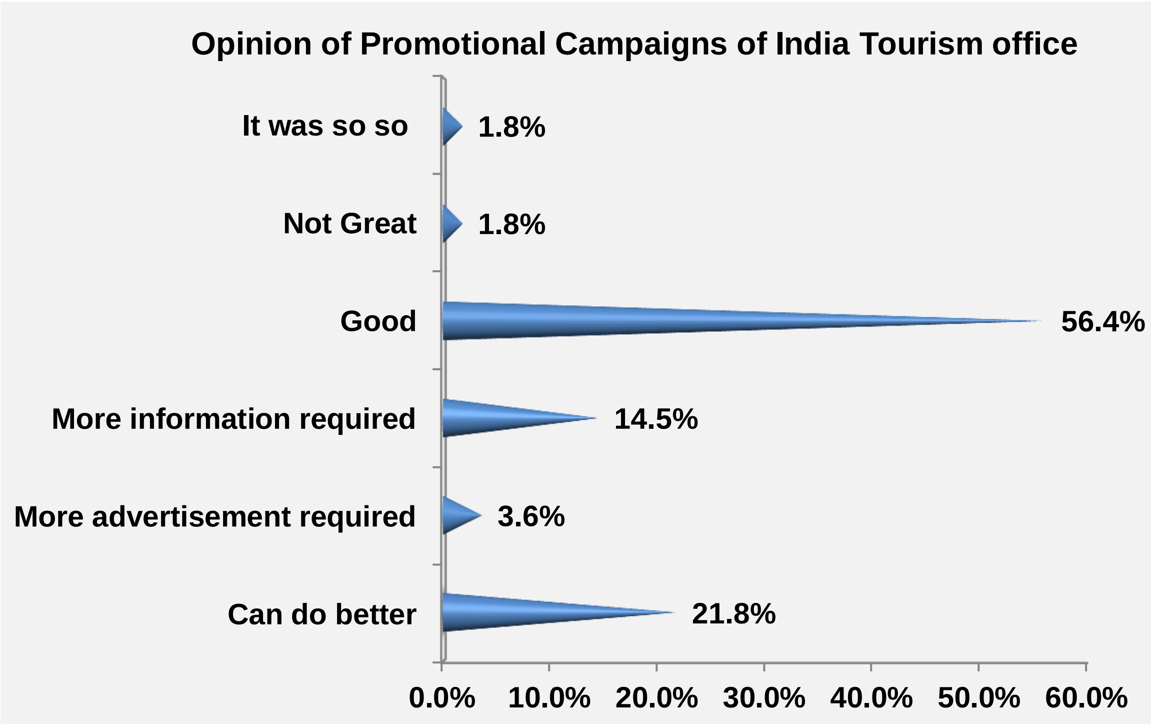
Figure 81: Source of information about India tourism office



5.1.1.2 Effectiveness of promotions and activities

As many as 56% of the 55 respondents who answered about their opinion on the promotion campaigns of India Tourism office in Johannesburg, 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 82: Opinion of Promotional Campaigns of India Tourism office



5.1.1.3 Influencing ability of promotional campaigns by India tourism office

28.5% of 600 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

53% of 600 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 200 prospective travellers, 42% were aware of an India Tourism Office in Johannesburg.

5.1.2.2 India tourism office approached or not

41% of those who were aware (that is, 35 of 84 respondents) had approached the office for assistance in planning the India trip.

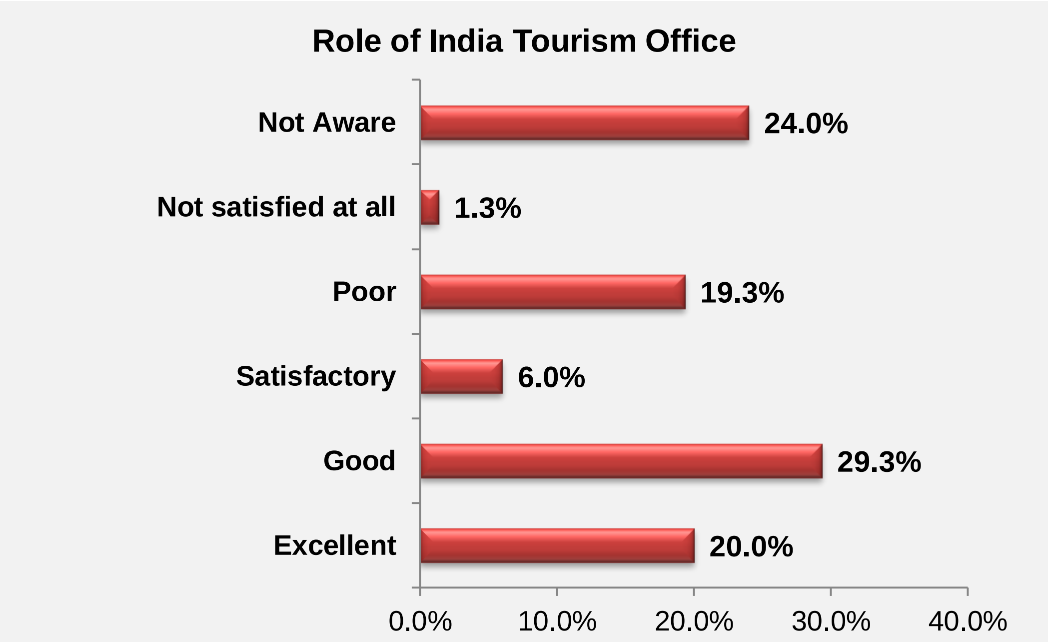
5.1.2.3 Role of India tourism office in helping tourists plan a trip to India

Of the 35 persons who approached the India Tourism Office, 85%, that is 30 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

29% of the 200 respondents felt that the Indian Tourism Office was playing a positive and good role in promoting India as a tourist destination.

Figure 83: Role of India tourism office



5.1.3 India Tourism Activity Qualitative Evaluation

Most tour operators felt that though the India Tourism Office staffs was helpful and their experience was satisfactory, at the same time, it was felt that these offices were not engaging in as much marketing and information dissemination as was desirable.

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 organising some Indian event/ consumer evening wherein through travel agents, the local community is called and knowledge about India is shared and information on Products are presented.

One tour operator said "*If we ask for high resolution photographs of destinations/places we do not get as it is not available. The current pictures are dull and not attractive and so we cannot put in our brochures when we sell to customers. As we have to survive and carry on our business we organise the same at our end without any support from Indian tourism office. It is not interactive with trade*".

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

1. Information about modern India & New India. Message that India is not a beach destination neither it is for kids
2. More communication with trade. Regular updates about events and activities
3. Advance notice and update about India Tourism activities so that trade can also put in their bit and prepare
4. Offering more support in terms of promotional material and campaigns, more enrolment with trade;
5. Increased marketing support, provide training to the front desk/ office of the trade;
6. Help in visa- and passport-related issues and regular notifications to trade regarding any change in visa rules and regulations
7. Search engine, advertisement support for trade;

8. Attending press conferences and seminars and interacting with tour operators and retail agents on a regular basis;
9. Educate agents/ trade about our products i.e. write ups, latest trends in India, change the theme every time
10. Provide small ads but be more focussed on one product;
11. Placing more ads in travel magazines and newspapers; / joint advertisement and support
12. Sorting out visa issues, for instance the photo dimensions required.

Chapter Six

Future Outbound travel Projections

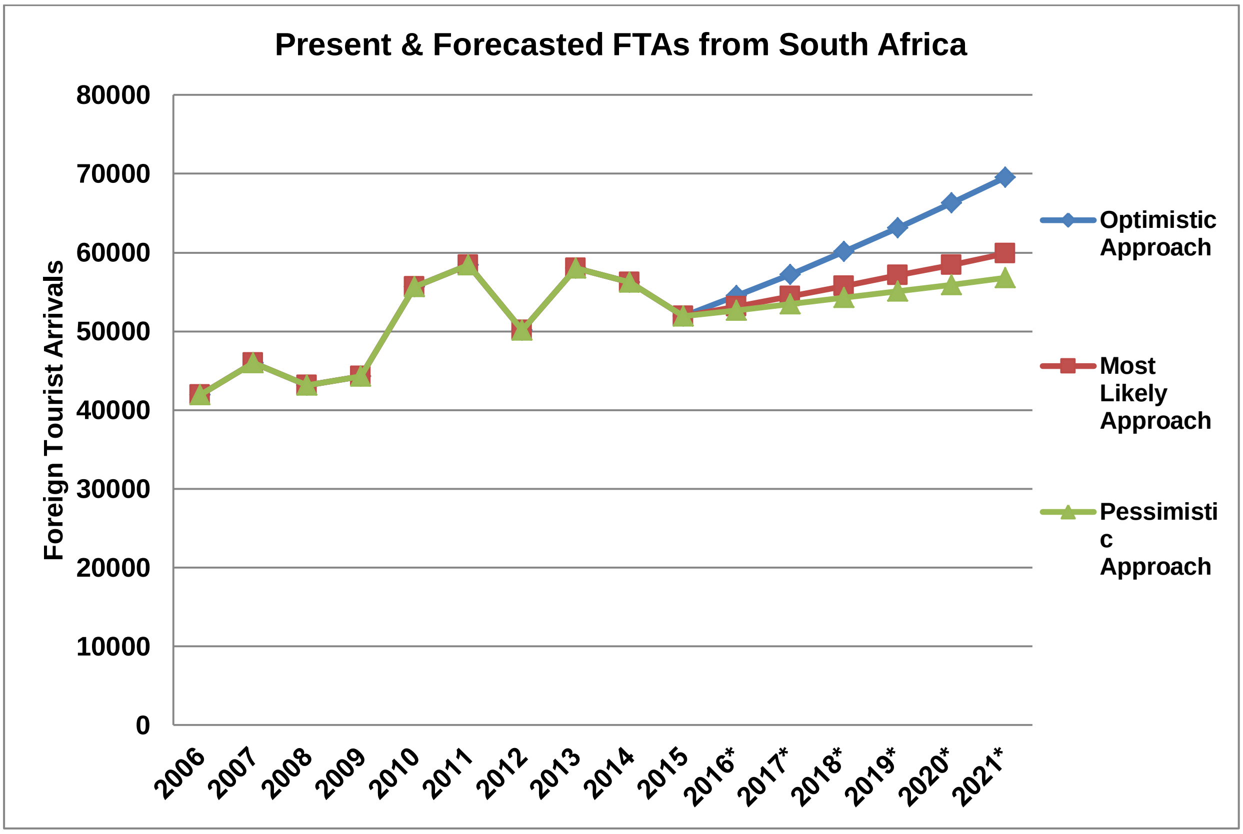
6.1 Projections for Future Outbound Travel

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 2.4% 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 5%. "***Pessimistic Approach***" - assuming the possibility that any future calamity can affect the factors considered- we have taken the rate as 1.5%. These approaches are captured in the forecast illustration below.

6.1.2 Forecast of Outbound Tourists from South Africa

Figure 84: Present & Forecasted FTAs from South Africa



The above data in tabular format is as presented below.

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

Years	Optimistic Approach	Most Likely Approach	Pessimistic Approach
2006	41954	41954	41954
2007	46042	46042	46042
2008	43175	43175	43175
2009	44308	44308	44308
2010	55688	55688	55688
2011	58430	58430	58430
2012	50161	50161	50161
2013	58023	58023	58023
2014	56246	56246	56246
2015	51922	51922	51922
2016*	54518	53168	52701
2017*	57244	54444	53491
2018*	60106	55751	54294
2019*	63112	57089	55108
2020*	66267	58459	55935
2021*	69580	59862	56774

*predicted values

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

Please note that these figures were arrived assuming that economic, social and political conditions of both India and South Africa 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 2000 travellers and tour operators was conducted in the South African cities of Cape Town, Johannesburg and Durban. These 2000 travellers consisted of 1200 past travellers and 800 prospective travellers. Utmost care was taken so as to not include NRIs/ PIOs as their responses might have skewed the trend of other perceptibly impartial travellers in terms of their knowledge of India and reasons for visiting India. However, it was found out from the study that South Africans are very of India and they perceive India as a beautiful place with many religious and divine places and they consider India as a place of culture and heritage. This knowledge of India stems not only from the colonial ties that both the countries share but also because of Mahatma Gandhi, as he had spent a part of his life in South Africa and is revered there for his social activism in that country and India. The top of the mind impression of India for South Africans is Rajghat, Agra, Jaipur, India Gate and Mumbai. Also South Africans are more interested in the beaches that India has to offer, Indian outfits, clothes, jewellery and Bollywood. For the native Africans also Bollywood is a very attractive draw to come and visit India along with cricket and football.

This positive impression of India is also dotted with some negative aspects which primarily do not convert the intention of visiting India to actually visiting India. Some of the negatives aspects of India, as per the South African travellers are the facet of crowdedness, poverty & begging, pollution and communication with locals. This along with an unfounded fear that India is a very big country and something might go wrong during their trip are factors that make South Africans take a back step from actually visiting India. This fear is enhanced by the fact that knowledge about the developments in India is not present amongst many travellers since communication about the new and developing India is not present amongst the mainstream media.

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

Most of them have travelled for their vacations during October to December to destinations like Australia, Canada, Dubai, London, Italy, Vienna, etc. The average duration for an African for a leisure holiday is 12 to 15 days and the bookings/travel plans are done 2 to 4 months in advance.

As per the trade, the major destination for Africans is within Africa as well as Malaysia, Thailand, Vietnam, Bali, Far East. Kenya and Egypt used to be on top earlier but now due to the situation there it is almost nil. For India, one of the most important hindrances from travellers is that there is no direct flight. One tour operators mentioned "*The travel for vacations/Leisure to Thailand/Phuket for 7 nights in 5 star resort including flight shall be 12000 rands vis –a-vis Kerala which shall be somewhere around 20000 Rands. Hence people opt for Thailand & Phuket and not India*". The trade also pointed out that there are 2 types of markets – for the native Africans and the Caucasians. Caucasians prefer Mumbai, Golden Triangle and Kerala as they are more interested in Yoga, Spiritualism, and Heritage. Because of no direct flight, either through Dubai or Doha with a stopover, the average duration is for 8 to 10 days. On the other hand for the Native Africans –want to know about Gandhi, History, and Architecture.

One tour operator quipped "*The repeat travellers prefer Rajasthan, Chennai, Kochi but the issue here is internal travel. Jaipur - Udaipur flights are no longer there. Only train, trains are not up to the mark. The other circuit is Udaipur – Nathdwara – Jodhpur for the ethnic travellers – but here again internal travelling is an issue*". The internal travel from one city to another in India is not cheap.. The other major issue is for internal travel in India which is besides being expensive, the baggage allowance is only 15kg whereas for international its 30 to 40 kg. For every 10 kg of extra bag USD 30 needs to be paid. The major season for travel from Africa is mainly between October to January. If one wants to experience EXTREMES then they travel to India.

The major destinations in India are Mumbai, Gujarat, Kerala, Chennai but the major issue is the awareness about India. There is an urgent need to advertise that India is a safe destination; that females can travel alone to India.

The other major issue that travellers face is obtaining Visa for India and also size of the photo required for visa is not mentioned. The visa process is complicated as per travellers. Also for Johannesburg residents one has to go to Pretoria which is a new rule as it is being processed by private party. The Visa rules keep on changing as per travellers and trade. The latest being that banks statement with minimum balance is essential without which it is not being processed. The trade feels that the application should be direct to the embassy as people at the Visa agency (3rd party) do not have knowledge about it. Secondly this shall reduce the processing time. In case of rejection, lot of time is lost.

Roadmap to Improve Promotional Activities:

- 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, Kerala & Goa. So, more destination specific visuals/ campaigns defining the products and its unique features need to be devised and promoted. Rather than marketing India or just one state to the trade, focus should be on marketing a product /activity/ event. Under the umbrella of brand India new tourist circuits need to be created to attract different type of travellers. Segment specific products i.e. different products and packages for adventure tourists, family travellers, business travellers, medical tourist's etc. need to be offered. Thus there is need to focus separately for the 3 different stakeholders.
- The *"Incredible India"* website needs to be upgraded regularly. The content of the website also needs to be reviewed periodically and new destinations/

products/ circuits need to be brought to the knowledge of the travellers. Promotional campaigns need to highlight the Incredible India web-address more prominently. There is also a need to increase the visibility of the website.

Trade/ Tour Operator:

Focussing on trade and forming a symbiotic relationship with trade will foster a greater number of foreign tourist visits to India. It is also suggested to improve the number of tour operators who sell India by providing free training and tutorials for tourism in India by Ministry and motivate them to work for 'India Tourism Office'. There is a need for an integrated approach by India Tourism Office and tour operators. India Tourism Office must participate in important fairs and festivals where they can sponsor any event which will finally send a message to "*Visit India"* and not just educate travellers about India. More communication with tour operators is required with regards to events that can be organized to boost tourism to India.

Media:

Media is a medium that can be used to make people aware about India. Media reaches the masses and hence is a very important tool of promotion. Currently the advertisements of Incredible India campaign are currently shown in channels that are international and the same for the entire African Subcontinent. Local channels in South Africa, which are most watched by the potential travellers are not showing India Tourism advertisements. The same is happening in case of print advertisements too. The media advertisements need to focus on the various products that India has to offer assuring that India is a safe and secure country to visit and can also showcase the unique blend of modern and traditional experiences that India has to offer. Media can also take the help of celebrities and famous personalities to promote the pleasant experiences that they had encountered during their stay in India.

Traveller:

More efforts need to be put in creating promotional campaigns which will increase footfalls of travellers to India. In order to attract intending travellers as well as past travellers (for repeat visit) - a comprehensive travel guide or plan with lots of stimulus is essential. Thus it is imperative to categorise the travellers from any particular country on the basis of their travel pattern and habit/ behaviour. Promotional campaigns need to highlight the Incredible India web-address more prominently to increase the visibility of the website.

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

Short Term Measures:

- Feature Incredible India advertisements in popular local channels and mainstream popular print media and more importantly on social media.
- A social media campaign of India Tourism highlighting the most liked aspects of tourism in the South African context.
- Organize focused Familiarization tours for media persons and tour operators.
- Impart training to front office executives who are in direct contact with prospective travellers so as they can handle all types of queries.
- Though enough publicity material is there, but it is all out-dated, there is no mention about New India – new destinations, new products, new packages, new circuits and new luxury properties need to be promoted alongside well known destinations, so as to offer a large choice in front of prospective travellers.
- Frequent interaction with tour operators – to remain connected.

Long Term Measures:

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

Annexure - Questionnaires Used

PAST TRAVELLER SURVEY

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

2. Name of the Respondent

3. Please let us know something about yourself

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

IF CODED 1, THEN PROCEED ELSE TERMINATE THE INTERVIEW

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

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

IF CODED YES, THEN PROCEED ELSE TERMINATE THE INTERVIEW

5. Are you a NRI / PIO?

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

IF CODED NO, THEN PROCEED ELSE TERMINATE THE INTERVIEW

6. Are you a National of the country?

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

IF CODED YES, THEN PROCEED ELSE TERMINATE THE INTERVIEW

7. How frequently do you make trips abroad?

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

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

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

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

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

Yes	1	No	2

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

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

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

Reasons	
Business	01
Holiday, Leisure	02
Social- visiting family & friends, relatives, attending marriages etc	03

Health & Medical	04
Pilgrimage /Religious Activity	05
Education/Research/Training	06
Shopping	07
Others	08

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

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

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

Fully Satisfied ☐ Partially Satisfied ☐ Not Satisfied ☐

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

Destination	**Visited Y/N**	**Source of information about the city**
Mumbai		
Delhi		
Kerala		
Kolkata		
Bangalore		
Chennai		
Agra		
Jaipur		
Varanasi		
Hyderabad		
Gaya		
Goa		
Other (Pls Specify)		

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

TV - **Serial**___________________ - **Advertisement**____________ ___________________________ ___________________________ - **Channel**________________ - **Documentary**_____________ ___________________________	1 a) b) c) d)	Friends / Relatives	7
		Newspaper____________________________	8
		Consumer Fairs & Exhibitions	9

Posters/Billboards/Movies__________ ________________________________ ________________________________	2	Previous Visit	10
Magazines/Books_________________ ________________________________	3	It is the country where I have my roots	11
Customer Information Services	4	Any other_______________________________	12
Trade Events	5		
Websites/Internet_________________ ________________________________ ________________________________	6		

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

Yes	1	No	2

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

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

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

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

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

Yes	1	No	2

21. Please answer

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

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

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

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

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

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

Expenditure Heads	**Package (USD)**	**Expenditure Heads**	**Non Package (USD)**	**TOTAL**
Accommodation		Accommodation		

International Travel		International Travel		
Local Travel		Local Travel		
Food including alcohol		Food including alcohol		
Others		Others		
TOTAL				

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

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

26. Would you like to re – visit India

Yes	1	No	2

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

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

b) If No, what are the reasons?

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

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

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

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

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

30. What was your mode of booking?

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

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

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

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

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

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

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

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

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

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

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

35. What is the average monthly household expenditure?

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

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

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

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

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

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

2. What was the reason for traveling abroad?

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

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

Country	Time of the year	Yes/ No	Duration

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

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

5. How was your trip?

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

6. What was your expenditure?

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

7. Was it value for money?

Yes	1	No	2

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

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

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

Expenditure Heads	**Package (USD)**	**Expenditure Heads**	**Non Package (USD)**	**TOTAL**
Accommodation		Accommodation		
International Travel		International Travel		

Local Travel		Local Travel		
Food including alcohol		Food including alcohol		
Others		Others		
TOTAL				

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

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

11. What was your mode of booking?

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

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

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

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

Yes	1	No	2

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

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

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

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

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

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

Tour Operator		**Rank**
Package Options	01	
Cost of Package	02	
Brand Name	03	
Presence of Tour Operator in Visiting Country	04	
Travel Insurance Facility	05	
Catering to my needs	06	
Better package deal	07	
Any Other________________________________	08	

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

(NOTE TO INV: READ OPTIONS. SINGLE RESPONSE ONLY)Travel Arrangements	
Readymade package	01
Tailor made package	02

International Ticketing	03
Visa	04
MICE (Meeting, Incentives, Conventions, Exhibitions)	05
Cruise Services	06
Sight Seeing	07
Others________________________________	08

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

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

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

Yes	1	No	2

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

Yes	1	No	2

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

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

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

Self	1	Travel operator	2

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

<u>IF CODED 02 IN Q 22, THEN ADMINISTER QUESTION – 24</u>

24. What is the reason behind this decision?

Reasons for not intending to travel to India	**Q 77**
Security Concerns	01
I do not like to be surrounded by too many people	02
India is a comparatively expensive option	03
Lack of good facilities in India in terms of Hotels, food, transport etc.	04
Will not have enough time to travel to all the places in India	05
Lack of knowledge about India	06
Any Other………………………………………………………………..	07

25. Would you like to visit India ever?

Yes	1	No	2

THANK RESPONDENT

INTENDING TRAVELLER SURVEY

(Respondent who has not travelled in last one year BUT INTENDING TO TRAVEL)

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

1. Name of the Respondent ____________________
2. Please let us know something about yourself

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

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

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

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

Yes	1	No	2

IF CODED YES, THEN PROCEED ELSE TERMINATE THE INTERVIEW

4. Address :____
____

5. Telephone /Mobile number :______________________________

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

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

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

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

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

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

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

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

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

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

Tour Operator	**Rank (1 to 3)**
Package Options	

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

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

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

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

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

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

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

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

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

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

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

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

Yes	1	No	2

PLEASE ADMINISTER Q 17 IF CODED 1 IN Q 16

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

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

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

Yes	1	No	2

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

PART – A - Travelers Who INTEND TO VISIT INDIA

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

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

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

Visit India	1	Part of Regional Trip	2

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

	1		3
	2		4

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

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

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

TV - Serial____________________ - Advertisement____________ - Hollywood Movies ______________________ - Travel Channel - Geography Channel - Documentary_____________	1 a) b) c) d)	FM Radio	7
		Digital (Face book / You tube)	8
		Fairs & Festivals (India Stall)	9
Posters/Billboards________________ ____________________________	2	Previous Visit	10
Magazines/Books_________________ ____________________________	3	Give aways (Festivals)	11
Bus wraps / Taxi Wraps	4	Friends / Relatives	12
Incredible India Road shows	5	It is the country where I have my roots	13

Websites/Internet________________	6	Any other______________________________	14

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

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

Yes	1	No	2

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

Yes	1	No	2

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

Yes	1	No	2

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

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

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

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

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

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

32. What would be the reason for traveling abroad?

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

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

Country	Time of the year	Yes / No	Duration

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

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

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

Yes	1	No	2

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

Yes	1	No	2

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

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

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

Self	1	Travel operator	2

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

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

40. What is the reason behind this decision?

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

41. Would you like to visit India ever?

Yes	1	No	2

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

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

I	Other……………………………….	1	2	3	4

43. What is your educational qualification?

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

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

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

THANK RESPONDENT

TOUR /TRAVEL OPERATOR

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

Collect visiting card

5. Countries where you offer travel or tourism services.

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

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

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

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

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

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

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

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

TV	1	Friends / Relatives	7
Posters / Billboards / Movies	2	Newspaper	8
Magazines / Books	3	Consumer Fairs & Exhibitions	9

Customer Information Services	4	Previous Visit	10
Trade Events	5	It is the country where I have my roots	11
Websites / Internet	6	Any other________________________________	12

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

Serial No.	Country Name	Reasons	Percentage

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

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

INDIA SPECIFIC QUESTIONS

21. Did you hear about India?

Yes	*1*	*No*	*2*

(If yes, then administer Q 22 onwards)

22. Where did you hear about India from?

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

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

Yes	*1*	*No*	*2*

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

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

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

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

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

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

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

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

Yes	*1*	*No*	*2*

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

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

31. Do you have any specific agents in India?

Yes	*1*	*No*	*2*

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

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

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

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

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

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

Decreased	1
Remained the same	2
Increased	3

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

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

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

Yes	1
No	2

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

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

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

Indian Tourism Office Related questions

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

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

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

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

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

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

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

		Reason
YES	1	
NO	2	
DK	3	
REFUSED	4	

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

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

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

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

Year	***%***	***Year***	***%***

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

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

____
____
____

THANK AND TERMINATE!