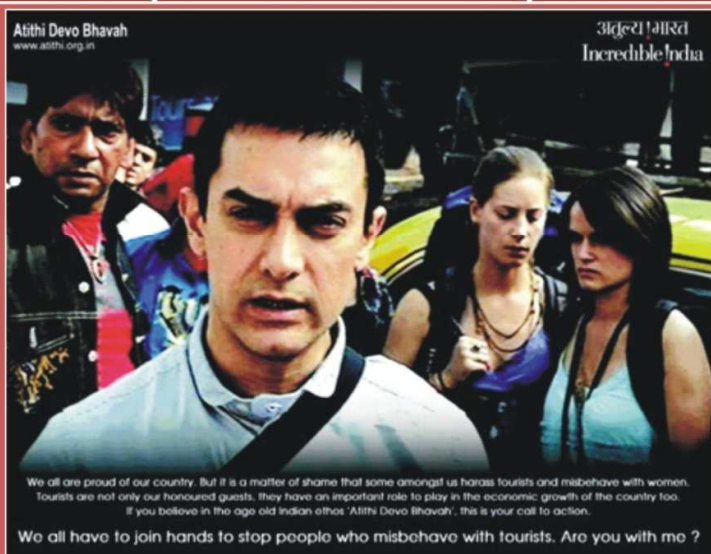


Evaluation of social awareness campaign for good behaviour towards tourists

A Report
submitted to
Ministry of Tourism,
Government of India



2011



2011

**Evaluation of social awareness
campaign for good behaviour
towards tourists**

A report by



INDIAN INSTITUTE OF TOURISM AND TRAVEL MANAGEMENT

Preface

Evaluation of social awareness campaign for good behaviour towards tourists is a project commissioned by the Ministry of Tourism, Government of India and carried out by the Indian Institute of Tourism and Travel Management (IITTM). Having realised the importance of communication with the internal publics including the community to put across a positive sentiment for tourism and visiting tourists, government launched an internal marketing campaign and branded it as “*Atithi Devo Bhava*” campaign. The campaign targets the general public, while focusing mainly on the stakeholders of the tourism industry. The campaign provides training and orientation to taxi drivers, guides, immigration officers, police and other personnel who interact directly with the tourist. The famous Indian actor Mr. Aamir Khan was roped in as a Brand Ambassador and a campaign on audio-visual media was launched.

This study presents an evaluation of the campaign especially the commercials featuring Mr. Khan. The report presents findings as to how far the campaign was successful in different parts of the country.

Prof. Manjula Chaudhary, *Director-IITTM*, directed this research. Team of researchers was supported by Saurabh Chawla (Project Fellow), Adesh Sharma (Project Assistant) and a team of 10 students of the institute- Ms. Rekha T., Mohit Limba, Godadhor Chongthan, Santokh Singh, Rohit S., Om Brahmvid Mishra, Rohit S. Kaurav, Rakshit Vats, Turja Sengupta and Piyush Kumar, who conducted the survey and entered the data.

Research team would also like to thank Secretary-MoT, Shri Rajen Habib Khwaja, and Additional Secretary, Shri Sanjay Kothari, Jt. Secretary, Shri Anand Kumar and Additional Director General, Shri Devesh Chaturvedi for their support and timely inputs.

Distinguished experts outside of IITTM provided valuable insights and advice. In particular we would like to thank Dr. R.N. Pandey, *Additional Director General* and his team at *Market Research Division* at Ministry of Tourism, Government of India. His critique and questioning came handy to fine tune the report.

We benefitted from numerous discussions with academic experts, practitioners in the field and different stake holders. We would like to acknowledge the support provided by non-teaching staff of the institute who were more than willing to facilitate in all possible manner. Special thanks are due to thousands of respondents across the length and breadth of the country who pleasantly surprised the research team with some very useful ideas during the interactions.

Our aspiration at IITTM is to contribute to existing body of knowledge first by creation of knowledge followed by its dissemination. IITTM's stakeholders include business leaders and policy makers besides the students and trainees. Institute strives to serve as a rendezvous' for dialogue on the tourism trends and their implications among academics, businesses and policy makers.

As with all IITTM studies this is an independent research. All care has been taken to ensure research neutrality. We also invite any discussion or comment on medical evaluation study based on this report.

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September, 2011

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Key Findings

Ministry of Tourism, Government of India commissioned a research project to Indian Institute of Tourism and Travel Management to evaluate the social awareness campaign for good behaviour towards tourists. The scope of the study included evaluation of media (audio/video) campaign featuring Mr. Aamir Khan, a popular actor. The key issues for the evaluation include assessment of effectiveness of the campaign in terms of recall, raising the issue and possible positive change in attitude of public towards tourists:

- ✚ 96.8% respondents feel that tourism is good for the country. Tourism service providers had the most positive disposition towards tourism.
- ✚ 71.3% respondents feel that tourists are not properly treated in India. More strongly a person believes that tourism is good for the country, more he/she feels that tourist are not properly treated.
- ✚ 63% respondents feel that tourists are ill treated but there is hardly anything that they can do. 60.3 % respondents feel that undesirable behaviour towards tourists must be controlled.
- ✚ 25.7 % respondents have personally come across situations where tourists were cheated or harassed.
- ✚ 69.6% respondents feel that government should own responsibility to ensure that tourists are properly treated. Respondents also believe that government is the most important vector in ensuring good behaviour towards tourists.
- ✚ 14.8 % respondents feel that government is not doing anything to ensure good behaviour towards tourists. Another 40.7% had no idea if government is doing anything.
- ✚ Campaign had a very good recall of 80%. Recall was relatively less in south (58.8%). Message was clear and unambiguous. 66.5% respondents concurred that the advertisement message was that we need to be good to the foreign tourists. Another 31.8 % inferred that we should be good to both domestic and foreign tourists.
- ✚ 88.5 % of respondents report seeing the advertisement on television. Another 11.0% say that they have both seen the commercial on TV and heard it on radio. Only 0.5 % respondents say they have heard it on radio.

- ✚ 77.6% respondents say that they were already aware of the issue before the commercials were aired. 73.9% of those who were not exposed to the issue earlier felt that the advertisement persuaded them to think more about the issue.
- ✚ 55.4% of the respondents who were exposed to the commercial discussed the issue with others including friends indicating that the campaign did generate some interest.
- ✚ 87.4% of the respondents felt that campaign has succeeded in raising awareness about the issue. 86.8% of respondents believed that the campaign can bring about change in attitude of people towards tourist.
- ✚ 93.5 % of the respondents felt that this is an important issue and government must continue to campaign. Meagre 6% of the respondents believed that government is wasting money on a useless issue.
- ✚ 96.8% of the respondents agreed with the issues raised by the campaign. 89.2 % of the respondents would like to educate others about the importance of good behaviour towards others.
- ✚ People felt empowered. 48.7% respondents said that they would stop the miscreants, while 28% said that they would report to police.
- ✚ 92.4% respondents found the advertisements easy to comprehend what the advertisement was all about.
- ✚ 73.6% believe that Mr. Aamir Khan was a good choice for Brand Ambassador.
- ✚ Most of the respondents view TV during 8PM to midnight (62.2%) followed by the time slot 5 PM to 8 PM (17.0%).
- ✚ Set Max, Star Plus and Aajtak are the top three TV channels in order where respondents have reported viewing the commercial.
- ✚ Except for Delhi, listenership of FM channels was quite low; recall of commercial was even lower. *Radio Mirchi* appeared to be a popular channel. However, FM channels are more popular in the morning while television is more popular in the evenings.

Research

Evaluation was based on a sample of 14697 respondents spread across 30 States and Union Territories in the 5 regions of the country- north, south, east, west and north-east. Stratified random sampling was done in 49 cities in these 30 geo-political units.

These cities represented 6 category-X cities, 21 category-Y cities and 22 category-Z cities. Field survey was carried out during May, June and early part of July of 2011.

1. Introduction

Social awareness campaign for good behaviour towards tourists is a marketing effort of the Government of India to promote India as a tourist destination. While Ministry of Tourism, Government of India aggressively promotes India as a preferred tourist destination with its 'Incredible India' campaign, it also recognises the importance of meeting the promised expectations on the 'ground'. Delivering the promise is quite a challenge. Promise is delivered by numerous stakeholders as tourist traverses through the holiday/ visit to India.

The concept of internal marketing has not quite explicitly been used in the context of destinations. There have been a few theoretical discussions but empirical testing has been limited (Gowreesunkar, Cooper, & Durbarry, 2009). The whole concept of IM appears to be interpretation of what Herb Kelleher, Founder and Chairperson of Southwest Airlines, often said *"our most important customers are your employees. If you take care of your employees they will take care of your customers. And when your customers are taken care of, they will keep doing business with you. Then your shareholders will be happy"*. However, there are a few caveats. One, this suggests that if your employees (read internal stakeholders) do not feel good about your company (read destination) and believe in your brand promise, then why would your external customers (read tourists)? Two, the onus is on the company to enable the employees to deliver what the company has promised to the customers. Third, the whole idea has so far been discussed with reference to companies who make a promise to an external customer and have some amount of control over the employees who deliver the promise.

However, in case of a tourist destination, the challenge is that the tourists' experience is a result of services provided by numerous independent businesses that have their stated interest and partner with other companies in the supply chain for a win-win situation. However, there are numerous other stakeholders who contribute to a tourist's experience but fail to relate to the Destination Management Organisation's (DMO's) promise as they are not able to make out how promoting and selling tourism at the destination benefits them. Stakes are often varied and correlate is frail. Stakeholders are not salaried employees of the company. A casual interaction of a tourist with a villager in a remote village is as much a part of her experience as a street side vendor who sells a bottle of water; or a porter who helps her at the railway station; or a taxi driver who takes her around Delhi as the trained tour guide, or the staff of a tour company. Therefore, an organic relationship exists between the residents (and other service providers) and the tourism destinations... (Gowreesunkar, Cooper, & Durbarry, 2009). Cooper & Hall (2007) talk about the interdependency and co-creation aspects which are prerequisites in delivering the final tourism experience. Keeping together all stakeholders and reinforcing the promise at the destination is the challenge that DMOs must live up to. Tourism being an ephemeral experience, the interaction with the stakeholders is the most

perceptible and tangible cue. Challenge therefore is to turn these different stakeholders into evangelists that go above and beyond for the DMO and the destination. For this to happen, the stakeholders must buy-in the destinations' promise and values that define the destination's brand.

Ebron (2006) refers to internal marketing as the application of marketing inside the organisation to instill customer focused-values. But this is not restricted to communication with internal stakeholders. Internal marketing is a comprehensive approach to enable 'internal publics' deliver. Different researchers have suggested constructs that construe internal marketing- inter-functional coordination and integration (Winter, 1985; Narver & Slater, 1990; Glassman & McAfee, 1992); customer-orientation (Gronroos, 1981); marketing like approach (George, 1990); job satisfaction (George, 1990; Nahavandi, Caruana, & Farzad, 2008); empowerment (Gronroos, 1981; Berry & Parasuraman, 1991; Rafiq & Ahmed, 1998); stakeholder's motivation (Rafiq & Ahmed, 1998; Nahavandi, Caruana, & Farzad, 2008; Cahill, 1996); quality of service (Berry & Parasuraman, 1991); stakeholder's development (Foreman & Money, 1995; Piercy & Morgan, 1989); vision of the firm (Foreman & Money, 1995); strategic rewards (Ahmed, Rafiq, & Saad, 2003); commitment (Gummesson, 1994); rewards (Lee-Ross, 1999); training and development (Nahavandi, Caruana, & Farzad, 2008); senior leadership (Ahmed, Rafiq, & Saad, 2003); and, internal communication (Ahmed, Rafiq, & Saad, 2003; Schultz, 2006).

Schultz (2006) offers the following concept of internal marketing:

'It involves all activities, actions and managerial directions that an organisation implements in order to encourage and generate employee and other stakeholders' support for marketing programs within the firm'

Gowreesunkar, Cooper, & Durbarry (2009) cite (Cahill, 1996) to conclude that in case of tourism destinations there could be no external marketing without internal marketing. The acceptance of residents to welcome tourists within their living environments is a prerequisite as this influences tourists' satisfaction and perception of tourism at the destination. Even service providers draw sanctity for a business from the host community's willingness to address tourist issues. Cooper (2007) suggests that destinations need to deploy an internal marketing approach as it includes all the efforts necessary to gain commitment and involvement towards destination partners and tourists. Chi & Qu (2008) in their research observe that "overall satisfaction with hospitality experience is a function of satisfaction with individual elements/ attributes of all the products/services that make up the experience such as accommodation, weather, natural environment, social environment, etc.

Johnson & Scholes (1989) suggest that the consolidation of acceptance (by stakeholders at a destination) is vital and is achieved through communication. Gowreesunkar, Cooper, & Durbarry, (2009) conclude that Communication has to be given a central position in the internal marketing process, as ideas, knowledge (tacit and explicit), information and suggestions need to be extracted from the host

community, the service providers, authorities and associations. The result is co-operation and this leads to cohesion of stakeholders in the delivery of the tourism product. Internal communication is a powerful enabler, especially in the case of destination marketing, where loosely connected independent stakeholders need to come together to recreate a rather abstract experience for the tourist visiting destination. Campaigns include the '*Atithi Devo Bhava*' campaign of the Ministry of Tourism, Government of India. Such communication often assumes the shape of public will campaigns by DMOs.

Atithi Devo Bhava

The "Incredible India" campaign was launched in 2002 by the Tourism Ministry and, like its name, made an immediate impact on the tourism industry of the country. The tourist influx of the country increased manifold in the subsequent years. '*Atithi Devo Bhava*' was initiated in 2005 to improve relations between host and the visiting foreigners. Having understood the importance of host community for a total tourist experience, government has decided to sensitise the public for better dealing with tourists, especially the foreigners. '*Atithi Devo Bhava*' is a public communication type of a campaign that focuses on creating 'public will', which will motivate members of the community to demonstrate generous behaviour towards visiting tourists. The campaign targets the general public as a whole, while focussing mainly on the stakeholders of the tourism industry. The main components of the campaign are training and orientation to taxi drivers, guides, immigration officers, tourist police and other personnel, directly interacting with the tourists, while simultaneously creating brand equity for the trained persons.

Union Ministry of Tourism featured Aamir Khan as the brand ambassador for its immensely successful '*Incredible India*' campaign and spread the message of '*Atithi Devo Bhava*' (guest is god). The new message is a country wide awareness drive to enlighten the people of India about the necessity of proper cordiality towards both domestic and international tourists.

As a brand ambassador, Aamir Khan is expected to promote the rich cultural heritage of India, and ways to preserve and enhance it. He also will try to instil the right attitude inside Indians and make them implement the true concept of 'guest is god'. The TV commercials as well as the print advertisements and posters featuring Mr. Aamir Khan have gone public from January 21, 2009.

The primary aim of the campaign is to encourage good behaviour towards tourists. This is expected to boost tourism in the country, which in turn would be a catalyst for India's economic development. The national level initiative is designated to address the pertinent issues at both micro and macro levels and work towards acceptable solutions to address them.

Research issue

Ministry has used spots on various FM channels and TV channels to air the campaign with the theme 'Good behaviour towards tourists', to sensitise masses and stakeholders. The spots were aired on FM Channels during May 1 to May 30, 2010 at Amritsar, Bangalore, Chennai, Delhi, Hyderabad, Jaipur, Kolkata, Mumbai and Panaji.

The TV campaign began in 2009 and continued till recent. Effectiveness of the campaign on FM channels needs to be evaluated immediately to mitigate the impact of recall lapse.

Research team was asked to include in sampling frame a reasonable number of major and minor towns respondents. Following terms of reference were finalised for this study:

1. To estimate the proportion of people who have listened to the advertisement on FM Channel or seen it on TV
2. To identify more popular TV channels/ FM Channels
3. To evaluate the perception of listeners/ viewers regarding the following:
 - a. Timing of the slot
 - b. Contents of the campaign
 - c. Suitability of the brand ambassador
 - d. Whether the campaign has resulted in change in their behaviour
 - e. Whether they would like the campaign to continue

'Public will' campaign

'*Atithi Devo Bhava*' is a public communication campaign that uses the media, messaging, and an organized set of communication activities to generate specific outcomes in a large number of individuals and in a specified period of time (Rogers & Storey, 1987). Such campaigns are an attempt to shape behaviour toward desirable social outcomes. To maximize their chances of success, campaigns usually coordinate media efforts with a mix of other interpersonal and community-based communication channels. There are two main types of campaigns: 1) individual behaviour change campaigns that try to change in individuals the behaviours that lead to social problems or promote behaviours that lead to improved individual or social well-being; and 2) public will campaigns that attempt to mobilize public action for policy change. Public will campaigns are less understood, but are increasing rapidly in number.

A public will campaign attempts to legitimize or raise the importance of a social problem in the public eye as motivation for policy action or change (Henery & Rivera, 1998). It focuses less on the individual who is performing the behaviour (i.e. the smoker, polluter, drug user), and more on the public's responsibility to do something that will create the environment needed to support that behaviour change. For this reason it is sometimes also referred to as a public engagement campaign.

The basic theory-of-change that underlies most public will campaigns with policy change as an outcome, is based on the agenda-setting process, which encompasses media, public, and policy agenda-setting, in that order (Bohan-Baker, 2001), and integrates framing, agenda-setting, and priming theory (described later). The idea is that the policy agenda is influenced by what the public thinks, cares about, and does. Public thinking and acting, in turn, are thought to be influenced, at least in part, by the media- so public will campaigns try to ignite a chain reaction of sorts in the agenda-setting process. They do this primarily on two fronts – by working to influence what’s on the media’s agenda and how issues get reported (e.g. using media advocacy) and by communicating to the public directly. Public will campaigns typically coordinate these efforts with more traditional organizing and policy advocacy work to bolster possibilities, so that intended policy outcomes are reached.

According to Leiderman & Dorfman (2000) Center for Assessment and Policy Development (CAPD) maintains that the goal of these campaigns, as their name implies, is to build public will. Therefore the measure of a campaign’s success is the extent to which it accomplishes that goal. In order for evaluation to be able to assess public will, it is important first to define it. Public will does not, however, have a precise definition. Some, for example, equate public will with public awareness or public education. CAPD says public will is an expression of how the public feels and acts. For example, public will, on issues that affect children and families, may be a communitywide, shared sense of ownership of the well-being of children and families, and a shared commitment to make the necessary changes to improve it. Ethel Klein agrees with this definition and says that public will shares much more in common with public engagement than with education and awareness.

CAPD defines ‘public will work’ as the steps required to change behaviours that influence social outcomes. It involves messaging, organizing, and advocacy targeted at individual and collective beliefs, attitudes, and behaviours. Public will work can include efforts to educate or inform public with the intent of having them support or oppose actions at a programmatic, system, or policy level. According to Ethel Klein, “All public engagement campaigns have to figure out what it is that they want the public to do; legislation is often a piece of that.” This can mean more than calling one’s legislator to express a position; it can mean encouraging individuals to behave in a certain way that creates the necessary social context for change and to create the necessary rationale for policy change. For example, the popular ‘*Bell Bajao*’ campaign revolves around the slogan Ring the Bell which is depicted in several situations from asking for a cup of milk, using the phone or to retrieve a lost cricket ball. The campaign encourages community residents to pay attention to and take action when they become aware of domestic violence in their neighbourhood. When it becomes more than just the victims’ responsibility to end the violence, this helps create the rationale for policies that help put an end to domestic abuse.

With this definition, public will is more than just public opinion or awareness. It is the willingness to act in support of how a person feels about an issue. Effective communications campaigns let people know the actions they want people to take. They should be actions that reinforce policy agendas and that people can undertake

in their own backyards (Gould, 1996). This linking of public will to behaviour is important because it has implications for how these types of campaigns are evaluated.

Caveats

Analysis of sample is bounded by assumptions and defined scope on one hand and constraints that restricted the respondents on the other.

One of the limitations of the study was that there was no pre-campaign study to serve as a benchmark against which the performance of the campaign could be metered.

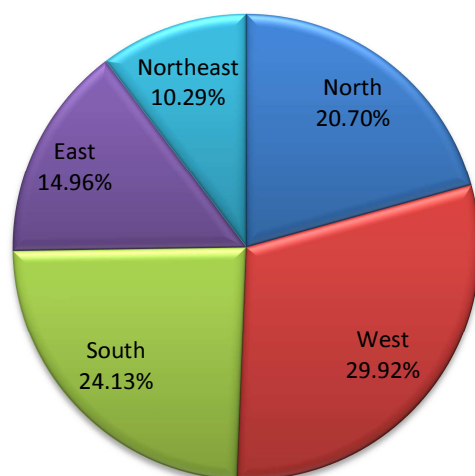
One of the observations is that in case of evaluation of social awareness campaigns, respondents tend to return acceptable behaviour responses. This obscures the actual picture/ evaluation. In case of the present study the results should be evaluated in the light of this fact.

2. Sample

Evaluation was based on a sample of 14697 respondents spread across 30 States and Union Territories in the 5 regions of the country- north, south, east, west and north-east. Stratified random sampling was done in 49 cities in these 30 geo-political units. These cities represented 6 category-X cities, 21 category-Y cities and 22 category-Z cities. Field survey was carried out during May, June and early part of July of 2011.

Sample comprised of 3043 responses from north, 4398 from west, 3546 from south, 2198 from east and 1512 from north-east (see Figure 2.1 below).

Figure 2.1: Distribution of sample across 5 regions of the country

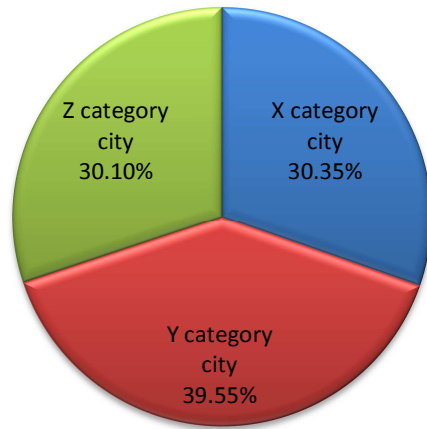


Sample was also distributed across different categories of cities- 4461 responses from category-X cities, 5812 from category- Y cities and 4424 from category-Z cities (See Figure 2.2). These cities were spread over five regions. Sample collected was further distributed as follows:

Table 2.1: Distribution of sample across different categories of cities in different regions

Region	Category X		Category Y		Category Z		Total
	Sub-sample	%	Sub-sample	%	Sub-sample	%	
North	887	29.1	1403	46.1	753	24.8	3043
West	1010	23.0	1775	40.4	1613	36.6	4398
South	1802	50.2	1031	29.1	713	20.7	3546
East	762	34.7	1103	50.1	333	15.2	2198
Northeast	0	0.0	500	33.1	1012	66.9	1512
Total	4461	30.4	5812	39.6	4424	30.0	14697

Figure 2.2: Distribution of sample across cities by category of city



Demographic profile of respondents

9404 (64%) of the respondents were males while 5293 (36% were females). Distribution of gender across the regions in the sample was as in table 2.2.

Table 2.2: Distribution of gender across regions in the sample

Region	Males	%	Females	%	Total
North	2203	72.4	840	27.6	3043
West	3038	69.1	1360	30.9	4398
South	1774	50.0	1772	50.0	3546
East	1461	66.5	737	33.5	2198
Northeast	928	61.4	584	38.6	1512
<i>Total</i>	9404	64.0	5293	36.0	14697

Distribution of gender across the different category of cities in the sample was as in table 2.3.

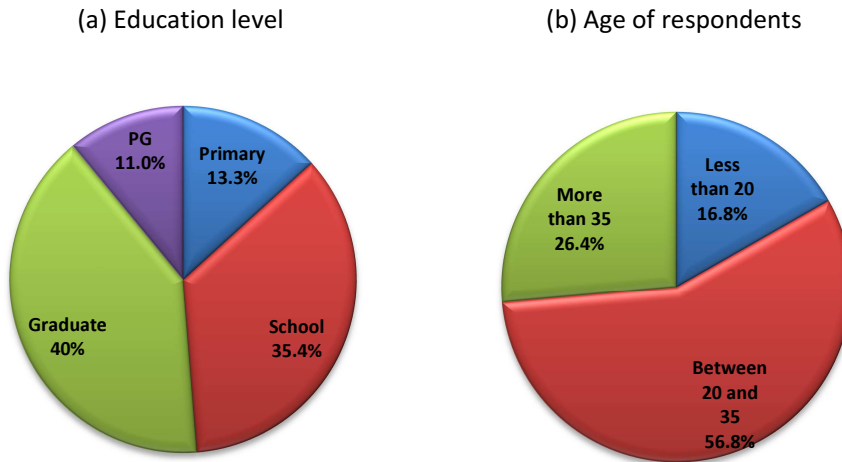
Table 2.3: Distribution of gender across different categories of cities in the sample

Category	Males	%	Females	%	Total
Category X cities	2643	59.2	1818	40.8	4461
Category Y cities	3947	67.9	1865	32.1	5812
Category Z cities	2814	63.6	1610	36.4	4424
<i>Total</i>	9404	64.0	5293	36.0	14697

16.8 % respondents were less than 20 years of age; 56.8% were between 20 to 35 years of age while the remaining 26.4 % were over 35 years of age.

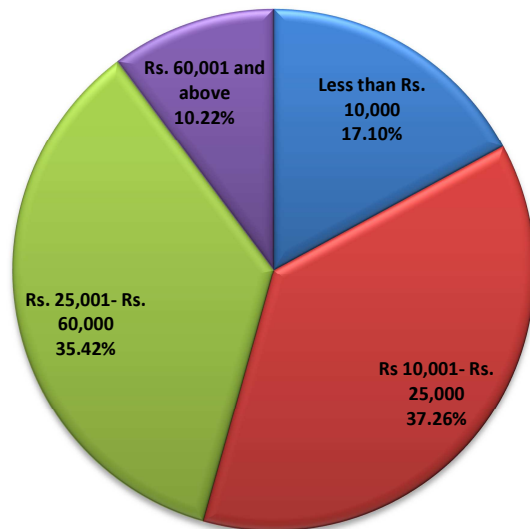
13.3% respondents had been to primary school; 35.4 % respondent had completed school; 40.3% were graduates while 11.0 % were postgraduates.

Figure 2.3: Age-wise and education-level-wise distribution of respondents in the sample



Another important variable of concern was the monthly family income. Family income of 17.1% respondents was less than INR 10,000 per month; 37.3% had family income between INR 10,001 and 25,000; 35.4% respondents' family income was between INR 25,001 and 60,000; remaining 10.2 % respondents had monthly family income more than INR 60,001.

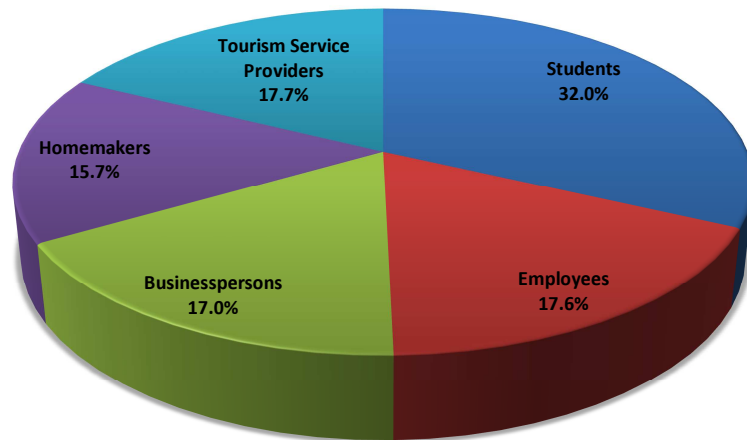
Figure 2.4: Distribution of sample according to monthly family income



While the campaign was targeted at public towards the large, stake holders of tourism, it was believed, would have varying degrees of concern for tourism and tourists. Researchers felt that tourism service providers were important and direct stakeholders. Indirectly, entrepreneurs, their businesses and employees were also important sub-segments of the public that matters to a tourist. Youth was an

important segment as they represent one of the main stakeholders of tomorrow. Besides these women who are largely confined to household are also important stakeholders. Accordingly it was ensured that opinion of each of such strata is reflected in the sample. The sample comprised of 32.0 % students, 17.0% business persons, 17.6 % employees, 15.7% homemakers, and 17.7 % tourism service providers (See figure X below).

Figure 2.5: Distribution of sample according to vocation



The sample therefore represented both the genders, all age groups, with different economic and educational backgrounds. Sample was drawn on all relevant sub-segments of the population and important stakeholders.

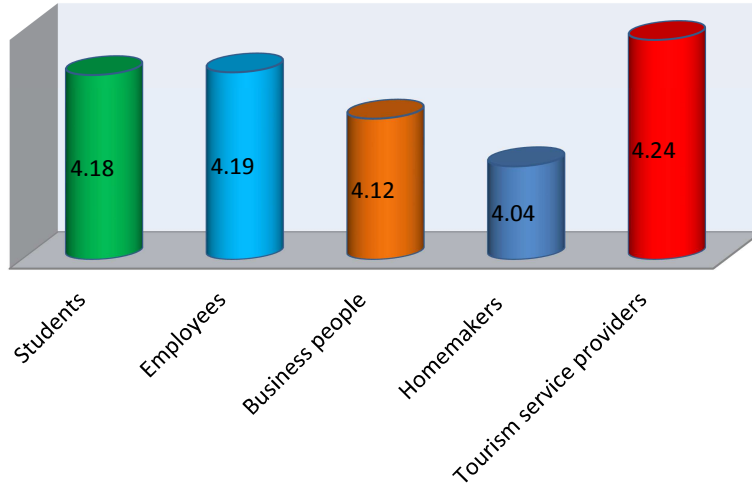
3. Public opinion on tourism and tourists

Public opinion was assessed based on an effective sample of 14697. As an over-all measurement of general opinion of the respondents about tourism a variable 'opinion about tourism' was constructed based on opinion of respondents about 'tourism is good for the country', 'tourism creates job opportunities', 'tourism brings wealth' and 'tourism brings peace and harmony through understanding'. Same was measured on a 5-point scale. A high score means a positive disposition towards tourism.

Opinion of different stakeholders

Overwhelming 96.8% respondents feel that tourism is good for the country. Understandably, tourism service providers had the most positive disposition towards tourism (4.24 on a 5 point scale), followed by students and employees. Comparatively homemakers were least positive towards tourism. Standard deviation for all categories varied between 0.53 and 0.57.

Figure 3.1: Stake-holder disposition towards tourism



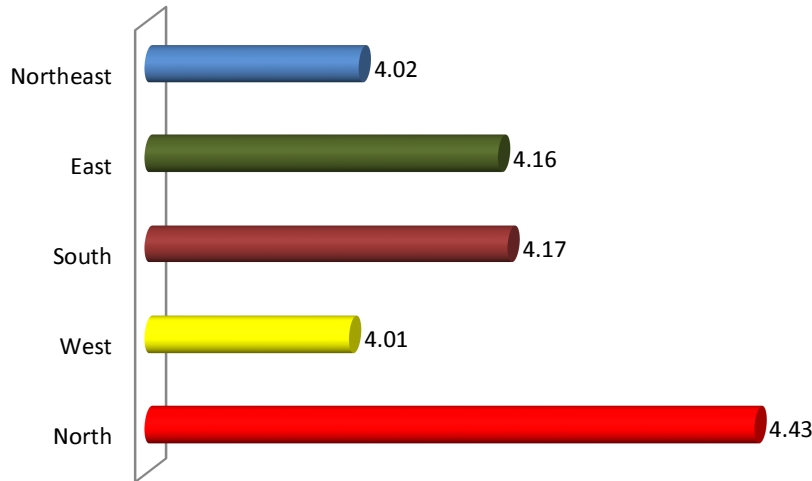
Business persons in general were among the less enthusiastic of the stakeholders.

Opinion across locations

Overall respondents in northern region felt strongly about tourism (4.43). Respondents from West (4.01) and Northeast (4.02) were less optimistic about the

efficacy of tourism. While respondents from category X cities were more positive about tourism, respondents from category Y cities were least positive.

Figure 3.2: Disposition towards tourism across regions (on a 5-point scale)



24 states and 6 union territories were included in the survey. For respondents from 24 states the average disposition was 4.14. Top 5 were Jammu and Kashmir (4.57), Punjab (4.53), Himachal Pradesh (4.46), Tamil Nadu (4.37) and Haryana (4.35), in that order. However, it was interesting to note that respondents were not as buoyant in award winning states.

Table 3.1: Disposition of respondents in best rated tourism states

		Mean of disposition	Rank (among 24 states)
<i>Rest of India</i>			
Rank 1	Madhya Pradesh	4.12	12
Rank 2	Andhra Pradesh	4.14	11
Rank 3	Kerala	3.88	23
Rank 3	Rajasthan	3.89	22
<i>Northeast and Jammu and Kashmir</i>			
Rank 1	Sikkim	3.89	21

Behaviour towards tourists

71.3% respondents feel that tourists are not properly treated in India. Table 3.2 presents disposition towards tourism and opinion about treatment meted to tourists. More strongly, a stakeholder believes that tourism is good, the more they feel that the treatment is not good and should be better (Correlation 0.99). In consonance with stakeholder's disposition towards tourism, the tourism service providers appeared to be more concerned about the behaviour meted out to tourists (3.77 on

a 5 point scale) followed by employed class, students, business people and homemakers, in that order.

Table: 3.2: Opinion of stakeholders about behaviour towards tourists that tourists are not properly treated in our country (comparison with disposition)

Stakeholder	Disposition towards tourism	Treatment meted to tourists	Gap
	(i)	(ii)	(iii)= (i)- (ii)
Tourism service providers	4.24	3.77	0.47
Employees	4.19	3.76	0.43
Students	4.18	3.76	0.42
Business people	4.12	3.74	0.40
Homemakers	4.04	3.72	0.31

Correlation between disposition towards tourism and opinion about treatment meted to tourists= 0.99

This is also reflected in the gap between positive disposition towards tourism and opinion about treatment meted to tourists. The gap is largest for tourism service providers and smallest for homemakers.

The relationship between disposition towards tourism and opinion that tourist is not properly treated is also visible across the five regions (Correlation .69). Gap between disposition towards tourism and treatment meted to tourists was also highest for the northern region.

Table 3.3: Opinion of respondents across five regions about behaviour towards tourists that tourists are not properly treated in our country (comparison with disposition)

Region	Disposition towards tourism	Treatment meted to tourists	Gap
	(i)	(ii)	(iii)= (i)- (ii)
North	4.43	4.04	0.39
West	4.01	3.54	0.47
South	4.17	4.05	0.12
East	4.16	3.90	0.27
Northeast	4.02	2.85	1.17

Correlation between disposition towards tourism and opinion about treatment meted to tourists= 0.69

Even for 30 units of study (states and union territories), the association was visible. Correlation between respondents' disposition towards tourism and opinion about treatment meted to tourists was 0.55.

There were a few trends that were visible. Higher the level of education the greater is the concern about behaviour meted out to tourists. Similarly, higher the income level of the respondents more was the concern about behaviour towards tourists.

Further, female respondents agreed more (3.82 on a 5 point scale) that tourists are not properly treated as compared to males (3.71). Youth (age 20 to 35) was more concerned (3.81 on a 5 point scale) compared to older people (3.70) and children (3.6).

Table 3.4: Educational background and opinion about behaviour towards tourists (on a 5 point scale)

<i>Educational level</i>	
Primary school	3.48
Completed school	3.65
Completed graduation	3.86
Postgraduate	3.99

Table 3.5: Educational background and opinion about behaviour towards tourists (on a 5 point scale)

<i>Monthly family income</i>	
Less than Rs. 10,000	3.28
Rs. 10,001 to Rs. 25,000	3.66
Rs. 25,001 to Rs. 60,000	3.97
Rs. 60,001 and above	4.12

19% respondents feel that there are other important issues to worry about rather than improper treatment meted out to tourists. Another 18% feel that it is not an important issue. 63% feel that tourists are ill-treated but, there is hardly anything they can do. This helplessness was higher in northern (73.5%) and north-eastern (70.1%) regions.

Overall 60.3% respondents feel that tourists are ill treated but it should be controlled. 11.9% respondents felt that even outside India tourists are not properly treated. 8.8% respondents felt that tourists are ill treated but not much can be done about it.

Figure 3.3: Opinion about importance of the issue of treatment meted to tourists

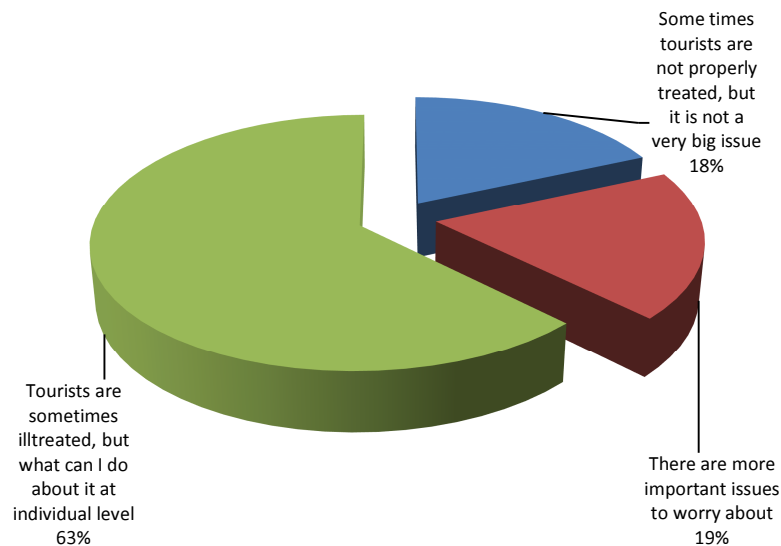
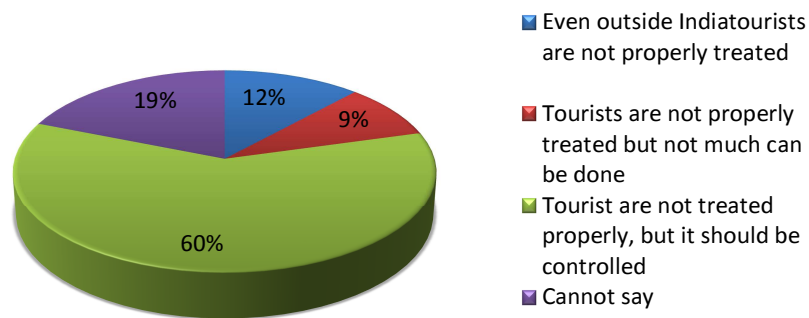


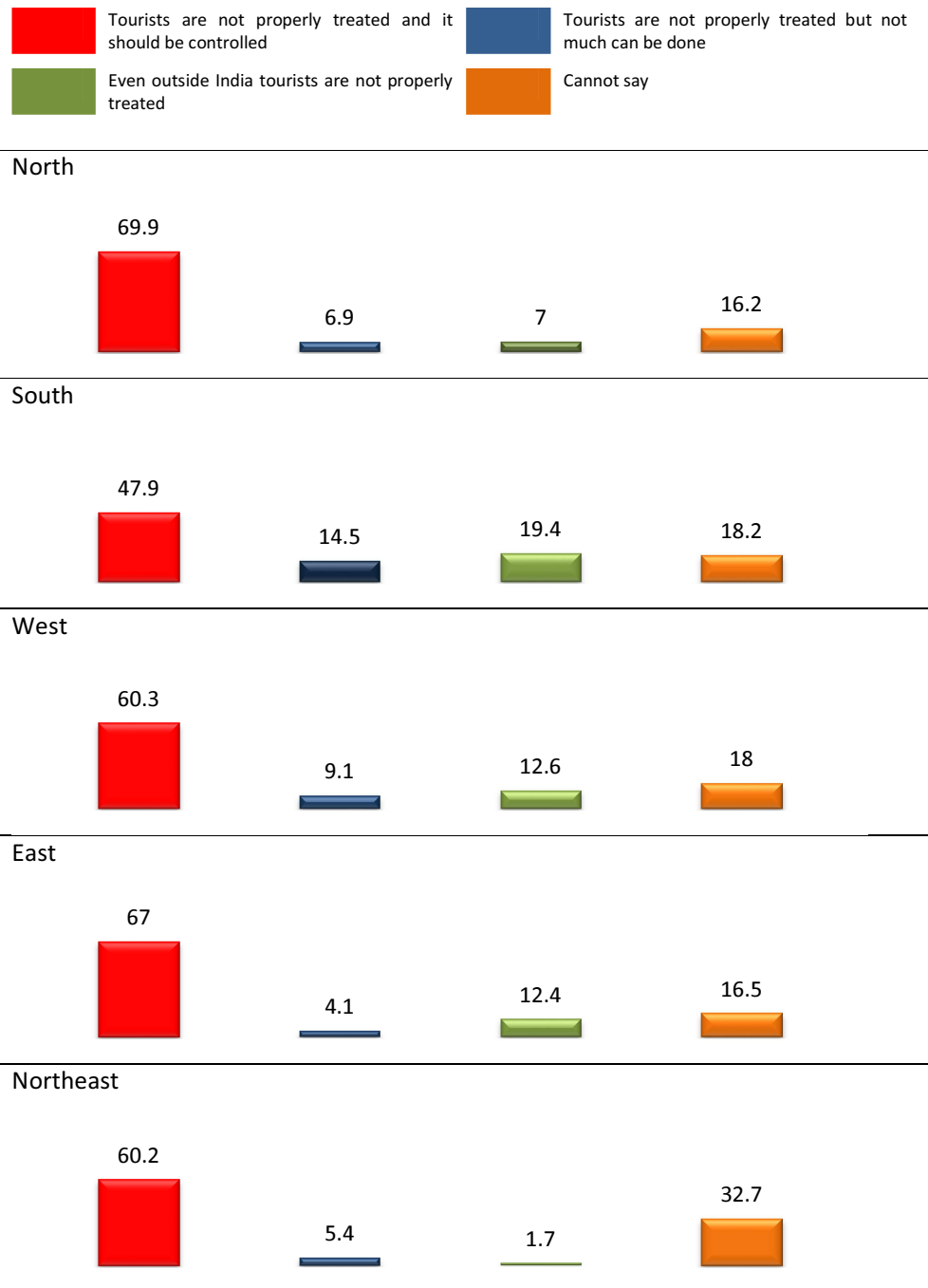
Figure 3.4 : Opinion about treatment meted to tourists



The belief that tourist is not properly treated and that it should be controlled was strongest in northern region (69.9%). This belief was weakest in southern region (47.9). In the Eastern region, 67% respondents believed the same. Most respondents did not believe that unacceptable behaviour towards tourists cannot be controlled. Largest proportion was in Southern region, where 14.5 % believed that not much can be done about improper treatment to tourists. Pan India this proportion was only 8.8%.

Figure 3.5 on the next page depicts region-wise breakup of respondents' opinion on behaviour towards tourists.

Figure 3.5: Opinion of the respondents about treatment to tourists- region-wise



Another important feedback was that as many as 25.7 % respondents have personally come across situations where tourists were being harassed or cheated. Only 27.8 % of respondents have neither personally come across such a situation nor do they know that tourists are being cheated and/ or harassed. Table 3.6 shows age

wise break up of personal experience of the respondents about tourists being harassed/ cheated.

Table 3.6: Personal experience of the respondents- age-wise

Age group	Personal experience of tourists being harassed/ cheated			Total
	No	Yes	Personally I have not come across this situation but I know this happens	
Less than 20 years of age	5.3%	3.8%	7.6 %	16.8%
Between 20 and 35 years of age	15.4 %	14.8 %	26.6 %	56.8%
More than 35 years of age	7.2%	7.1%	12.2%	26.4%
Total	27.9%	25.7 %	46.4%	100%

However, as given in the table below, there was not much difference in the personal experience of male and female respondents (compared to the overall experience). Figures in parenthesis represent percentage within the gender (compare with total)

Table 3.7: Personal experience of the respondents- gender-wise

Gender	Personal experience of tourists being harassed/ cheated			Total
	No	Yes	Personally I have not come across this situation but I know this happens	
Males	18.6% (29.1%)	16.5% (25.8%)	28.9% (45.1%)	64%
Females	9.3% (25.7%)	9.2% (25.6%)	17.6% (48.8%)	36.0%
Total	27.9%	25.7 %	46.4%	100%

Difference in opinion about tourism

An important issue was to assess if there is a significant difference in opinion about tourism among those who saw the campaign and those who did not. Respondents were asked to rate their opinion on a 5 point scale with 5 meaning a strong positive disposition for tourism. Those who have seen the social awareness advertisement featuring Mr. Amir Khan rated it 4.174 while those who were not exposed to the advertisement rated it 4.111. However it is interesting to note that this difference was statistically significant (used t-test, $\alpha=0.05$). This means that those who were exposed to the advertisement had a positive disposition towards tourism which was significantly more than those who were not exposed to the advertisement.

4. Responsibility for good behaviour towards tourists

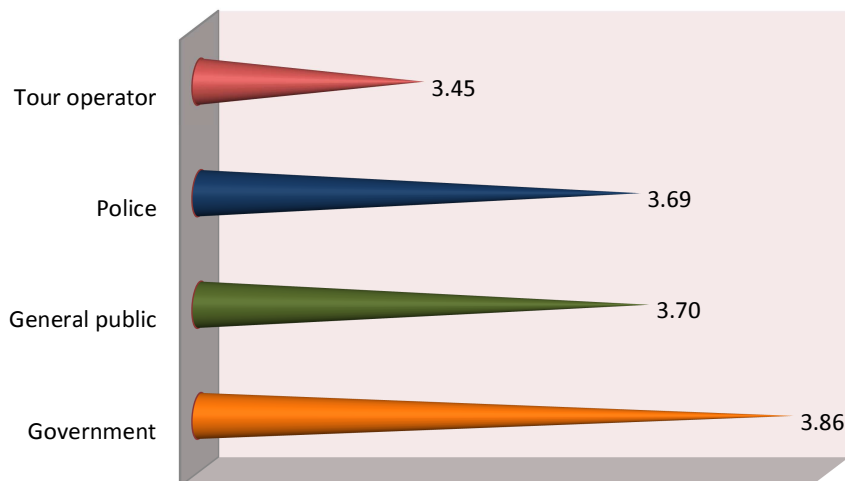
This section deals with the opinion of respondents as to who is responsible for good behaviour towards tourists. It is asked if government should do something about ensuring proper behaviour towards tourists. Rating scales were used. Feedback was also obtained if respondents knew that government was doing anything.

Who is more responsible for good behaviour towards tourists?

69.6% respondents feel that government should own responsibility to ensure that tourists are properly treated.

Over all respondents feel that government is the most important vector in ensuring good behaviour towards tourists (3.9 on a 5 point scale). It is interesting to note that respondents feel that the next one responsible is the general public (3.7) followed by police (3.7). Tour operators were considered the least responsible in ensuring good behaviour towards tourists (3.4) (see Figure 4.1).

Figure 4.1: Respondents rating of stake holder responsibility for good behaviour towards tourists (on a 5 point scale).



Except for the Category X cities respondents felt that general public's responsibility to ensure good behaviour towards tourists was second only to that of government's responsibility. In metros (category X cities) respondents felt that it was police's duty to ensure good behaviour towards tourists.

Table 4.1: Respondents rating of stake holder responsibility for good behaviour towards tourists (on a 5 point scale) across the three category of cities

	Category X	Category Y	Category Z	Overall
Government	3.83	3.90	3.85	3.86
General public	3.65	3.74	3.71	3.70
Police	3.74	3.70	3.63	3.69
Tour operator	3.27	3.56	3.47	3.45

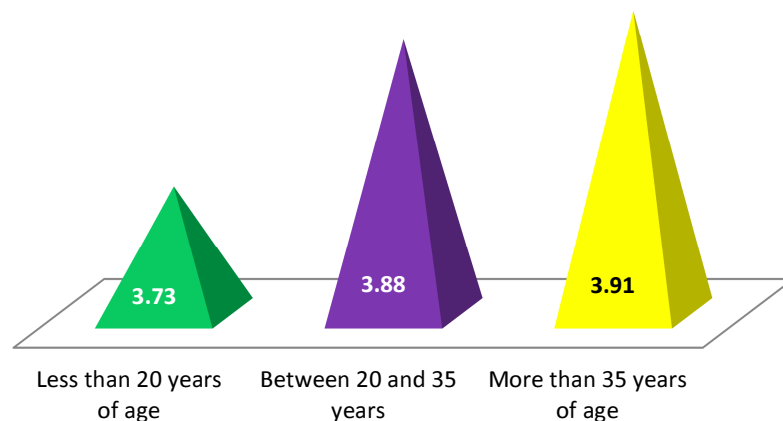
Across the regions the response was varied. While in north, south, west and northeast respondents maintained that government was most responsible for ensuring good behaviour towards tourists, in east respondents felt that it was general public’s responsibility. Respondents from north, south and northeast rated police’s responsibility as number two while in west it was general public that was considered responsible next to government. In east government’s responsibility was considered next to that of general public. In all the regions respondents felt that among the four stakeholders listed, tour operators were less responsible as compared to other three stakeholders.

Table 4.2: Respondents rating of stake holder responsibility for good behaviour towards tourists (on a 5 point scale) across the five regions of the country

	North	South	West	East	NE	Overall
Government	4.40	3.40	3.74	3.80	4.32	3.86
General public	4.05	3.20	3.73	3.81	3.97	3.70
Police	4.17	3.31	3.58	3.57	4.11	3.69
Tour operator	3.82	3.17	3.26	3.41	3.96	3.45

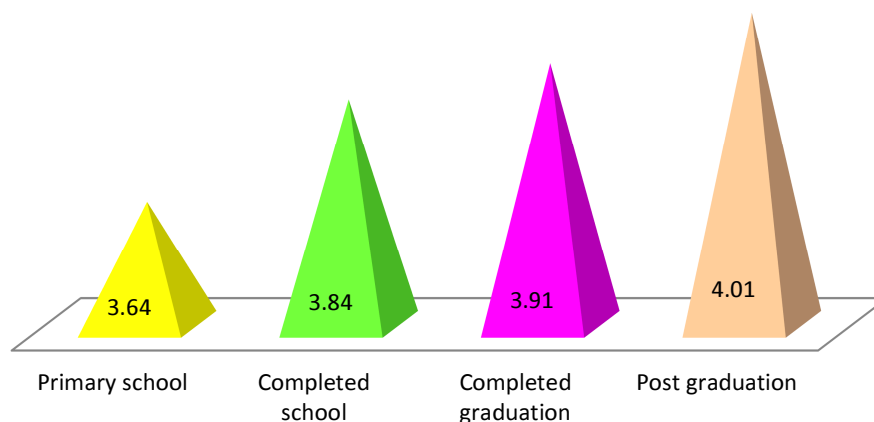
Looking at the feedback, according to the age of the respondents a similar trend was observed. However, in most cases, the belief got stronger with age (Figure 4.2).

Figure 4.2: Belief that government should ensure good behaviour towards tourists according to age of respondents (on a five point scale)



Similarly, the belief that government is responsible for ensuring good behaviour towards tourist also got stronger with the level of education.

Figure 4.3: Belief that government should ensure good behaviour towards tourists according to educational level of the respondents (on a 5 point scale)



Do you know if government is doing anything to ensure good behaviour towards tourists?

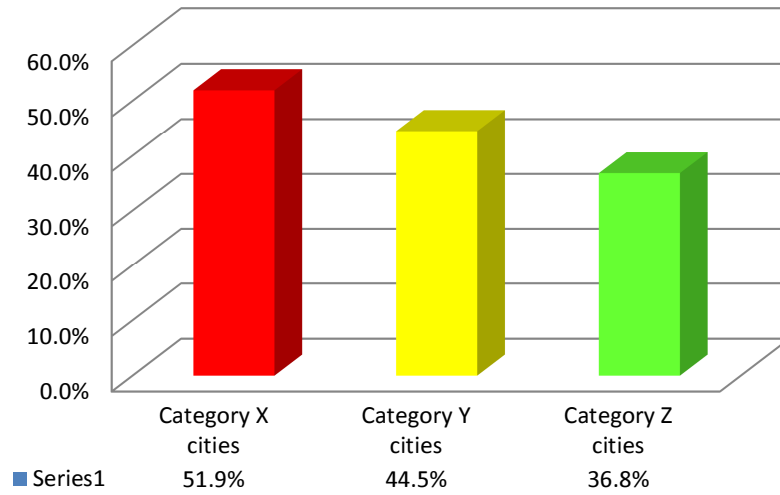
Only 44.4% respondents knew that government is doing something to ensure good behaviour towards tourists. 14.8% respondents feel that government is not doing anything. 40.7 % respondents did not know if government was doing anything. Visibility of government efforts is an important means to raise awareness about the issue. Response within the regions is as in table 4.3 below:

Table 4.3: Is the government is doing anything to ensure good behaviour towards tourists? Region-wise

	Yes	No	Do not know
Overall	44.4%	14.8%	40.7%
North	53.8%	17.7%	28.6%
West	41.4%	11.6%	46.9%
South	51.0%	9.6%	39.4%
East	47.5%	34.6%	17.9%
Northeast	14.4%	1.9%	83.7%

In the northern region, 53.8% respondents knew about government's efforts. This was on the higher side in south as well (51.0%). In eastern region 34.6% felt that government is not doing anything. In northeast 83.7% respondents did not know if government was doing anything to ensure good behaviour towards tourists.

Figure: 4.4: Visibility of the government's efforts- category of city wise



Government's efforts were more visible in bigger cities (51.9%) as compared to smaller cities (Y (44.5%) and Z (36.8%) category) in that order. Around 50% respondents from Z category cities were not aware of government's efforts.

5. Effectiveness of the campaign

An overwhelming 11759 respondents out of 14697 (80 %) said that they had seen the advertisement featuring Amir Khan that talks about good behaviour towards tourists.

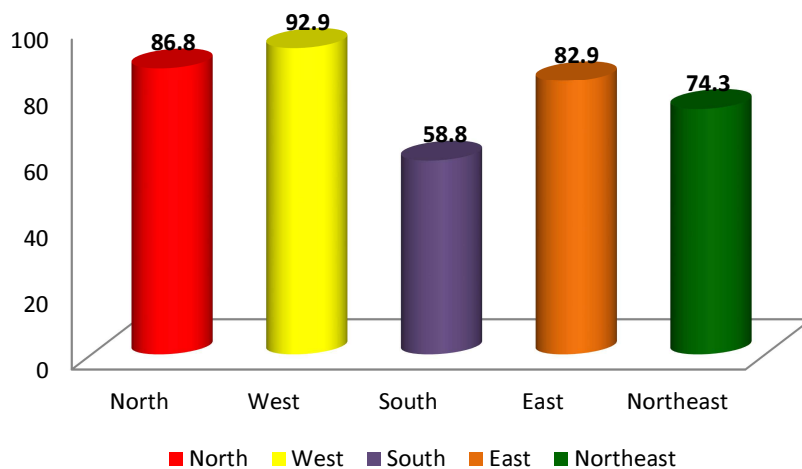
Table 5.1: Recall of campaign advertisements across different categories of cities in different regions of the country

Region	Category-X			Category-Y			Category-Z			Overall		
	Sub-sample	Recall	%	Sub-sample	Recall	%	Sub-sample	Recall	%	Total	Recall	%
North	887	754	85.0	1403	1210	86.2	753	676	89.8	3043	2640	86.8
West	1010	865	85.6	1775	1660	93.5	1613	1561	96.8	4398	4086	92.9
South	1802	1263	70.1	1031	700	67.9	713	123	17.3	3546	2086	58.8
East	762	638	83.7	1103	927	84.0	333	258	77.5	2198	1823	82.9
Northeast	0	0	NA	500	399	79.8	1012	725	71.6	1512	1124	74.3
Total	4461	3520	78.9	5812	4896	84.2	4424	3343	75.6	14697	11759	80.0

Recall was highest in western region (92.9%) followed by northern region (86.8 %), eastern region (82.9%), north-eastern region (74.3%) and quite low in southern region (only 58.8 %) in that order. Poor recall in southern region was primarily due to very poor recall in Z-category cities of the south (only 17.3%). Even among metro cities (category X) the recall was only 70.1 % as compared to 80 plus percentage in other category X cities. Similarly, the recall was only 67.9% in category Y cities of southern region, as compared to 80 plus in Y-category cities of other regions. Recall was highest (93.5%) in category Y cities in western region.

Poor recall in south is understood. The advertisement was in Hindi, whereas penetration of Hindi in south is relatively less.

Figure 5.1: Recall of advertisement in five-regions of the country



What was the advertisement about?

Respondents were asked to respond to the content of the advertisement. Overwhelming 66.5% respondents concurred that the advertisement message was that we need to be good to the foreign tourists. Another 31.8 % inferred that we should be good to both domestic and foreign tourists. Together it was 98.3% - clearly indicating that the message was clear and unambiguous.

Table 5.2: Interpreting content of the advertisement- percentage within the region

<i>Content of the message</i>	<i>North</i>	<i>West</i>	<i>South</i>	<i>East</i>	<i>NE</i>	<i>Total</i>
We should be good to the foreign tourists	82.0%	52.1%	73.1%	65.3%	72.2%	66.5%
We should be good to the domestic tourists	1.8%	1.0%	1.2%	3.0%	0.3%	1.5%
We should be good to both	16.0%	46.6%	25.2%	31.6%	27.5%	31.8%
None	0.3%	0.3%	0.5%	0.1%	0.1%	0.3%

Sample= 11759, Missing values 24; effective responses 11735

Except for one commercial released in 2009, almost all advertisements depict a tourist as a foreign national. The powerful campaign is therefore interpreted as desiring good behaviour towards international tourists and it is left to the imagination of the viewer to include domestic tourists or not. 'Atithi' means guest; guests come from outside. Therefore, by default domestic tourists are not considered guests. Government should come up with a separate campaign for good behaviour towards domestic tourists as well. Domestic tourism market is almost 100 times the foreign tourist market. In this case the commercials may address desirable behaviour towards domestic tourists, and responsible behaviour by these tourists.

Where did you come across the advertisement?

An overwhelming 88.5 % of respondents report seeing the advertisement on television. Another 11.0% say that they have seen the commercial on TV and heard it on radio. Only 0.5 % respondents say they have heard it on radio. However, it may be noted here that there were 10 cities (see table 5.3 below) where the commercial was aired on local FM radio. It was observed that the proportion of those exposed to commercial only on radio was minimal; whereas TV appeared to be a more effective media for the commercial. Commercial on radio met with limited success. Based on the proportion of the respondents who have either heard the commercial on FM or on both the media, Patna (37.7%) and Delhi (34.3%) appeared to be more popular with radio listeners. This was followed by Mumbai (24.5%), Hyderabad (24.4%), Jaipur (19.7%) and Panaji (15.3%). Radio commercials can be considered to be moderately successful in these four cities. However, radio commercials did not appear to capture the attention of listeners in Kolkata (9.7%), Chennai (8.8%), Bangalore (8.4%) and Amritsar (where there were no takers). Further, it may also be noted that recall was very poor in Chennai (only 31.3 %).

Table 5.3: Exposure to commercial- 10 cities where commercial was aired on local FM radio

<i>City</i>	<i>Sub-sample</i>	<i>Recall %</i>	<i>Recall sub-sample</i>	<i>Seen on TV (%)</i>	<i>Heard on Radio (%)</i>	<i>Both TV and radio (%)</i>
Kolkata	762	83.7	638	90.3	0.5	9.2
Mumbai	1010	85.6	865	74.3	1.2	24.5
Delhi	887	84.4	749	65.6	0.3	34.0
Jaipur	253	94.5	239	80.3	0.0	19.7
Panaji	304	94.7	288	84.7	1.4	13.9
Bangalore	548	90.9	498	91.6	1.2	7.2
Hyderabad	630	90.5	570	75.6	0.0	24.4
Chennai	623	31.3	195	91.3	2.1	6.7
Amritsar	225	91.1	205	100.0	0.0	0.0
Patna	365	72.6	265	62.3	1.1	36.6

Except for students, for all other categories 90 plus percent respondents have seen the advertisement on the television. FM radio appears to be a more popular media for communicating with students (around 17.2%).

Table 5.4: Exposure to commercial- according to profession/vocation

	<i>Seen on TV</i>	<i>Heard on FM radio</i>	<i>Both</i>	<i>Missing values</i>
Students	82.7%	0.6%	16.6%	(3)0.1%
Employees	91.2%	0.3%	8.4%	(1)0.0%
Business persons	92.0%	0.4%	7.7%	0.0%
Homemakers	92.7%	0.5%	6.8%	0.0%
Tourism service providers	90.0%	0.3%	9.7%	0.0%
<i>Total</i>	88.5%	0.5%	11.0%	0.0%

Similarly, youngsters less than 20 years of age (15.8%) and those between 20 and 35 years of age (12.0%) reportedly heard the commercial on the local FM radio. As expected, commercial reaches a relatively large segment of younger groups, especially students, through local FM radio.

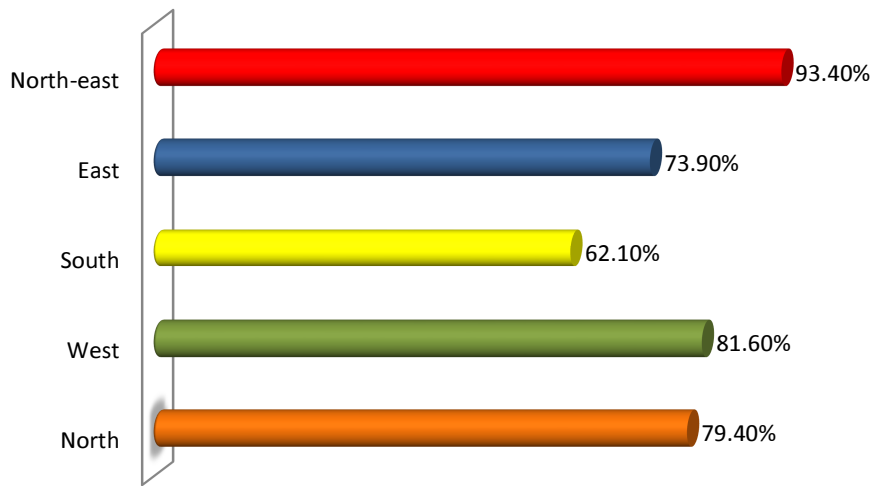
Effectiveness of the campaign

Following sections addresses three issues. First, whether those who had seen the advertisements (11759) were earlier aware of the issue; second, did the advertisement force them to think deeper; and third, did they discuss the issue with others including friends. While the first two issues reflect on the campaign's ability to generate awareness, the third issue reflects if it also generated necessary interest, and the issue became a subject of discussion.

Awareness of the issue before being exposed to the commercial

77.6% respondents say that they were already aware of the issue before the commercials were aired. However, this response needs to be understood with care. There was no pre campaign study done which provides a measure of awareness about the issue before the campaign. Such awareness about the issue was highest in the north-eastern region (93.4%). Pre-campaign awareness in south India was the lowest (62.1).

Figure 5.2: Pre-campaign awareness- region-wise



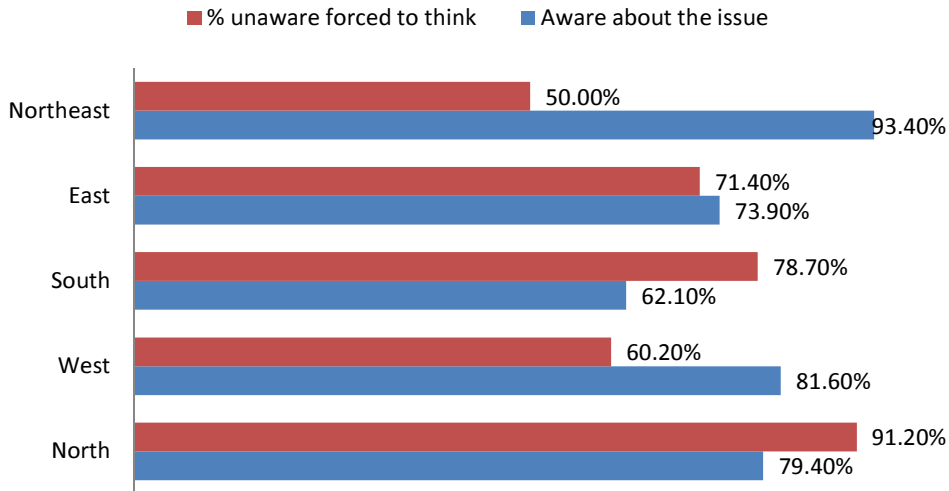
Those who were not aware of the issue before being exposed to the commercial were asked if the advertisement forced them to think more about the issue. There were 2635 respondents who were not aware of the issue before they saw the advertisement. 73.9% of these respondents felt that the advertisement persuaded them to think more about the issue.

Table 5.5: Unaware respondents forced to think more about the issue (% within the region)

	North	West	South	East	NE	Total
Yes, forced to think more	91.2%	60.2%	78.7%	71.4%	50.0%	73.9%
No	8.8%	39.8%	21.3%	28.6%	50.0%	26.1%

An important observation is that in regions where pre-exposure awareness was less, the commercials forced a larger proportion of respondents to think deeper about the issue and vice-versa (see table 6.2 below). The net effect was that a larger proportion of respondents were rendered aware about the issue after the campaign.

Figure 5.3: Did commercials force you to think about the issue? –region wise



The commercial forced unaware respondents to think more about the issue in bigger cities- 83.9 % in X category cities, 73.7% in Y category cities, and 50.8 % in Z category cities. This may be seen in the light of the fact that 85.0% respondents in Z category cities were aware of the issues before being exposed to the commercial whereas it was 80.2% in Y category cities and only 66.8% in X category cities. Table below shows the percent respondents in different types of cities, who were aware of the issue before being exposed to the commercial and proportion of the unaware respondents who were forced by the campaign to think about the issue.

Table 5.6: Proportion of respondents who were forced to think more of the issue about the issue

Total respondents	11740 (who saw the advertisement)	2635 (who were unaware of the issue)
	<i>% aware within the category of the city</i>	<i>% of unaware within the category of the city who were forced to think more about the issue</i>
<i>Category X cities</i>	66.8%	83.9%
<i>Category Y cities</i>	80.2%	73.7%
<i>Category Z cities</i>	85.0%	50.8%
<i>Total</i>	77.6%	73.9%

Out of 11715 respondents who were exposed to the commercial 55.4% discussed the issue with others including friends, indicating that the campaign did generate some interest. As expected, the interest was more among the tourism services providers where 60.6 % of them discussed it with others. This was followed by students where 57% discussed with others. However, there was not much difference across the respondents from different age groups (around 55% in each case).

Looking from regional perspective, 74 % respondents from north and 72% from east discussed the issue with others. It was only 31.4% respondents in northeast and 40.1% in west who discussed the issue with others. A trend was visible across the

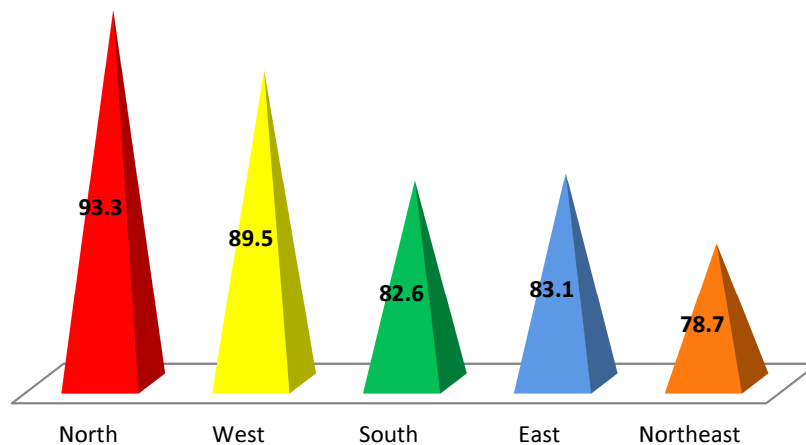
different categories of cities with 65.9 % respondents in category X cities, 55.5% respondents in category Y cities, and 44.1 % respondents in category Z cities, who discussed the issue of good behaviour towards tourists with others.

68.5% of the respondents' friends and relatives with whom they discussed the issue displayed concerns about the issue. 1.1% said that the issue is useless while another 2.8% showed no interest in the issue. 19.6% formed no opinion on the issue.

Public opinion about the campaign

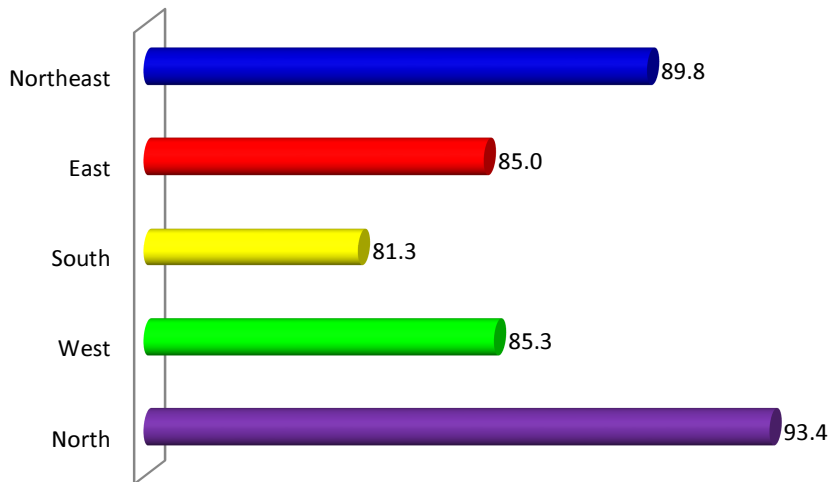
87.4% of the respondents felt that the campaign has succeeded in raising awareness about the issue. This belief was strongest in northern region (93.3%) and weakest in the Northeast (78.7%).

Figure 5.4: Percentage of respondents who believe that campaign succeeded in raising awareness about the issue.



86.8% of respondents believed that the campaign can bring about change in the attitude of people towards tourists. Again this belief was strongest in north (93.4%) while fewer believed so in south (81.3%).

Figure 5.5: Percentage of respondents who believe that campaign can bring about positive change in people’s attitude towards tourists.



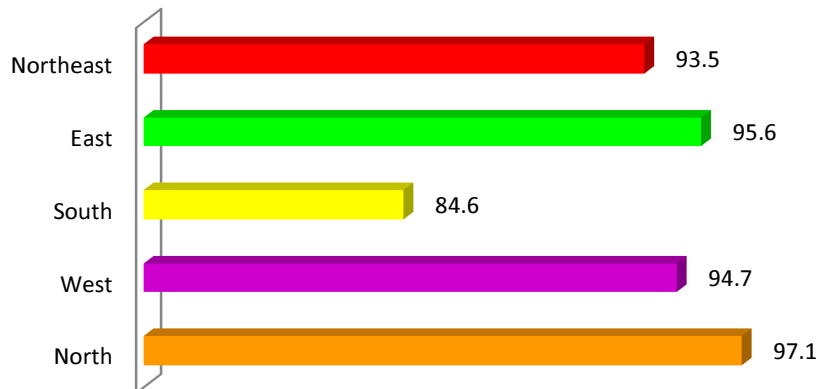
A meagre 6% of the respondents believed that government is wasting money on a useless issue. In South 8.1 % of the respondents believed that this campaign is a waste of money.

A negatively worded statement that “government is doing good, but it will not make much of a difference” was not endorsed by the respondents (only 18.3% agreed, while 52.3% disagreed).

Should government continue with the campaign?

An overwhelming 93.5 % of the respondents felt that this is an important issue, and the government must continue to campaign.

Figure 5.6: Percentage respondents in different region who want government to continue with the campaign



When asked whether the government should continue with the campaign, as many as 97.1 % of respondents in the north, and as few as 84.6% of the respondents in the south wanted so.

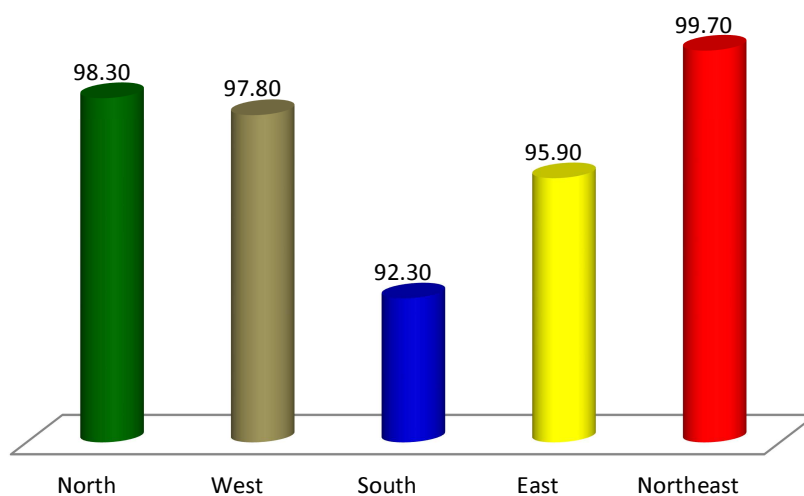
6. Change in attitude

An attempt was made to assess change in the attitude of respondent in terms of their readiness to act in the event of inappropriate treatment of tourists/ behaviour towards tourists.

Do you agree with the issues raised in the campaign?

96.8% of the respondents agreed with the issues raised by the campaign. 99.7 % respondents in the north-eastern region and as few as 92.3% in the southern region agreed with the issues raised.

Figure 6.1: Percentage of respondents in different region who agreed with the issues raised in the campaign

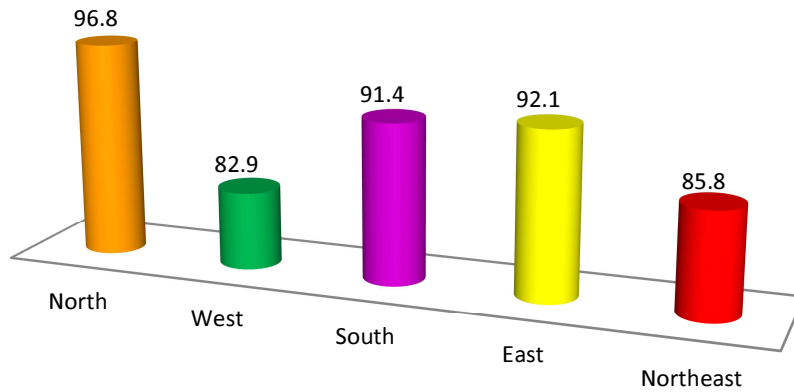


One of the positive effects of the campaign is that 89.2 % of the respondents would like to educate others about the importance of good behaviour towards others. Understandably, 92.4 % of the tourism service providers were willing to educate others. Interestingly, it was followed by students, where 91.2% might educate others. An interesting observation was that likelihood of respondents educating others increased with the level of education of the respondent.

Table 6.1: Percentage of respondents willing to educate others about the issue (according to education level)

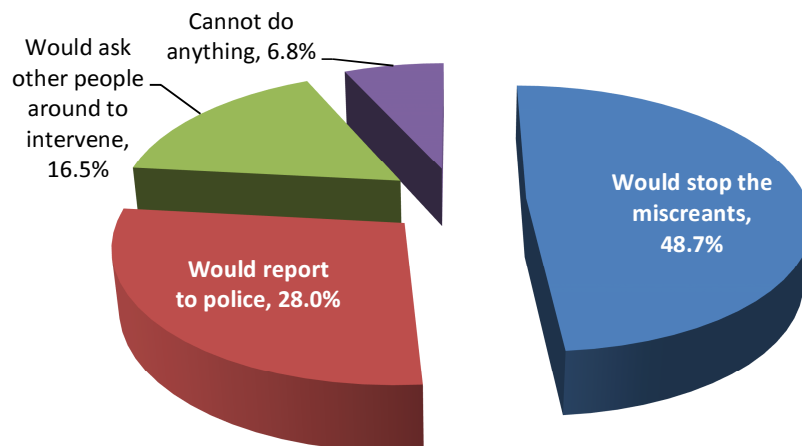
Primary school	Completed school	Completed graduation	Post graduate	Overall
83.1%	88.4%	90.6%	92.9%	89.2%

Figure 6.2: Percentage of people in different regions who would like to educate others about importance of good behaviour towards tourist



Another good effect of the campaign was that people found themselves empowered. Only 6.8% respondents said that they cannot do anything if they see someone harassing/ cheating a tourist. 48.7% respondents said that they would stop the miscreants, while 28% said that they would report to police. 16.5% respondents said that they would ask other people around to intervene.

Figure 6.3: What would you do if you see someone harassing/ cheating a tourist?

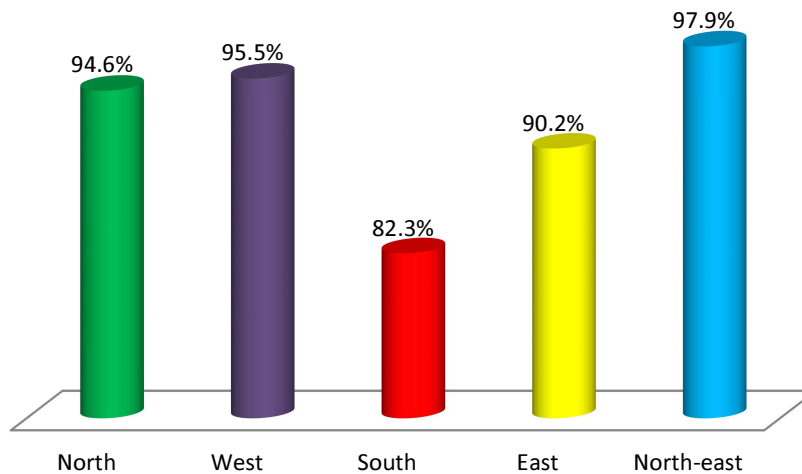


Among those who said that they cannot do anything to stop the miscreants, 31.1% were students.

7. Was the advertisement understood?

92.4% respondents found the advertisements easy to comprehend, as to what the advertisement was all about. For 6.7 % the commercial was good but they took some time to understand it. As noted earlier also, in southern region there was some difficulty. Only 82.3 % people understood the advertisement immediately (as against an overall average of 92.4%). 15.4% respondents from south reported that the advertisements were good but they took some time to make sense. 2.2 % respondents did not understand the advertisement.

Figure 7.1: Proportion of respondents who understood the advertisement immediately- region wise

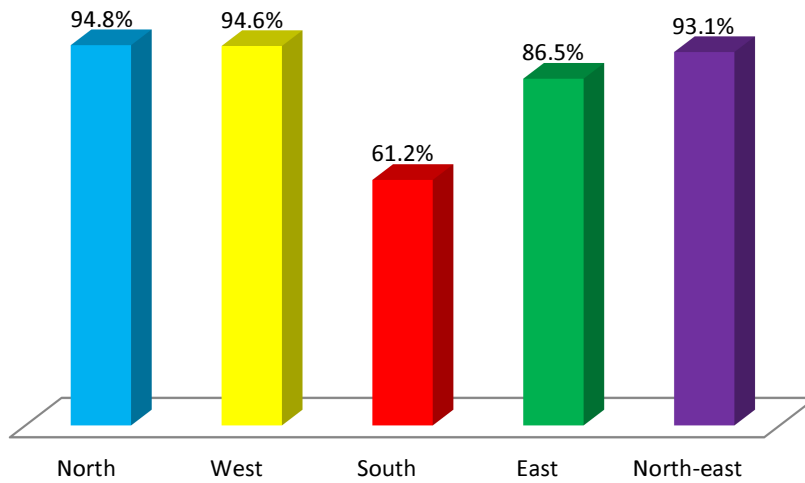


Though not significant, understanding of advertisement appeared to increase with the level of education of the respondents. Among the different professions/vocations, students appeared to have understood the advertisement the least (89.5% against the overall average of 92.4%).

87.4% respondents found the language and contents of the advertisement easy (87.4%). Again, in the south this proportion was as low as 61.2 %, and this is understood. 38.8% respondents from south felt that it would have been better if the advertisements were in local language.

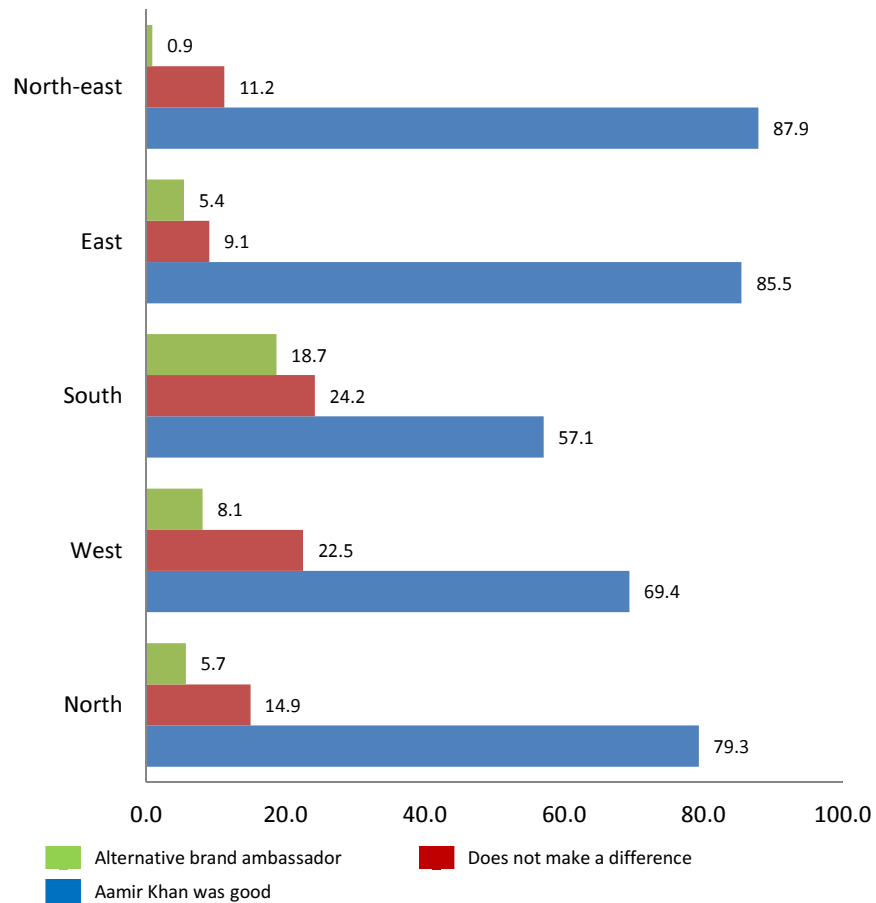
92.2 % respondents from category Z cities found language and content of the advertisement simple whereas it was only 89.5% and 79.8% respondents in categories Y and X cities.

Figure 7.2: Proportion of respondents who found language and content of the advertisement simple- region wise



Choice of brand ambassador

Figure 7.3: Choice of brand ambassador- region wise



Around eighteen percent (17.9%) respondents believe that it does not make a difference as to who is the brand ambassador. Around 8.5% respondents have suggested alternative brand ambassadors. However 73.6% believe that Mr. Aamir Khan was a good choice. As expected, 18.7 % respondents from south have suggested an alternative brand ambassador. Less than one percent respondents from north-east suggest an alternative brand ambassador.

8. Viewership/ Listenership

This section presents data of distribution of viewership of TV / listenership of FM channels among the respondents across the country.

Table 8.1: TV viewership across country (Region wise) (percentage within the region)

	North	West	South	East	North-east	Overall for the time slot
6 AM to 9 AM	3.8%	8.1%	6.7%	11.3%	3.8%	6.9%
9 AM to 1 PM	1.9%	3.3%	4.0%	4.7%	3.0%	3.4%
1 PM to 5 PM	3.4%	14.5%	10.0%	15.1%	7.1%	10.4%
5 PM to 8 PM	11.6%	15.9%	28.5%	8.0%	16.1%	17.0%
8 PM to midnight	79.3%	58.2%	50.8%	60.9%	69.9%	62.2%
N=13954						

Clearly, most of the respondents view TV during 8PM to midnight (62.2%) followed by the time slot 5 PM to 8 PM (17.0%). TV is least viewed during 9 AM to 1 PM (3.4%). In South 28.5% respondents view TV during 5 PM to 8 PM. In north around 80% respondents view TV during 8 PM to midnight. In East 11.3% respondents view TV also during morning hours(6 AM to 9 AM).

27.8% homemakers get to view TV during 1 PM to 5 PM while only 39.6% of them view TV during 8 PM to midnight. 24.7% of students view TV during 5 PM to 8 PM.

FM spots were aired in nine cities- Amritsar, Bangalore, Chennai, Delhi, Hyderabad, Jaipur, Kolkata, Mumbai, Panaji and Patna. Sample collected from these 9 cities had 5607 sample points, out of which 2280 responded to this question (40.7%).

Table 8.2: FM Channel listenership across country (Region wise) (percentage within the region)

	North	West	South	East	Overall for the time slot
6 AM to 9 AM	23.4%	21.0%	33.8%	40.8%	27.7%
9 AM to 1 PM	29.7%	27.3%	5.1%	8.3%	18.8%
1 PM to 5 PM	7.8%	9.3%	15.9%	12.7%	11.4%
5 PM to 8 PM	24.4%	14.7%	13.8%	21.0%	17.9%
8 PM to midnight	14.7%	27.6%	31.4%	17.2%	24.3%
N=2280					

Interestingly, it was observed that FM Channel listenership is evenly distributed during the day. Unlike TV viewership, there is a significant FM listenership during morning hours. 27.7% respondents tune in to FM channels during 6 AM to 9 AM. In east and south this proportion is as high as 40.8% and 33.8% respectively. In north 29.7 % of the respondents tune in to FM channels during 9AM to 1 PM, while in the

west, 27.3% of respondents tune in during this time slot. In south and west a large proportion of listeners tune in between 8 PM to midnight.

Out of 11759 respondents who could recall the advertisement, 10910 (92.8%) provided feedback about the TV channel where they saw the commercial. Many respondents reported viewing the commercial on more than one channels. Together there were 25316 sighting of the commercials. Commercials were released on 66 TV channels. Among these top 15 were as follows:

	TV Channel	% share	Type
1	Set Max	11.1	Entertainment
2	Star Plus	8.1	Entertainment
3	Aaj Tak	6.7	News
4	Zee Cinema	5.4	Entertainment
5	Star Gold	5.2	Entertainment
6	Sony Entertainment	4.5	Entertainment
7	Colors	4.3	Entertainment
8	Zee TV	3.9	Entertainment
9	Discovery	3.2	Entertainment
10	NDTV Imagine	2.5	Entertainment
11	Star Movies	2.5	Entertainment
12	Star News	2.4	News
13	NDTV India	2.2	News
14	NDTV 24*7	2.1	News
15	IBN 7	1.8	News

The commercial was more visible on the national entertainment TV channels as compared to others. This was followed by national news channels. Respondents recalled commercial least on local channels.

Of the 5607 respondents from the 9 cities where commercials were aired on FM channels, only 1228 respondents reported listening to the advertisement on an FM channel (21.9%).

Table 8.4: Proportion of respondents who have listened to the advertisement on an FM channel

City	Sub-sample size	Respondents who have listened to the advt. on FM	% age	Top two channels (with % share)
Jaipur	253	54	21.3%	My FM (40.0%) Radio Mirchi (22.2%)
Mumbai	1010	253	25.1%	Radio Mirchi (32.4%) Radio-one (24.1%)
Hyderabad	630	167	26.5%	Radio Mirchi (38.9%) Big FM 92.7 (36.5%)
Delhi	887	496	55.9%	Radio Mirchi (51.2%) Radio City (20.9%)
Patna	365	87	23.8%	Radio Mirchi
Kolkata	762	87	11.4%	Radio Mirchi (31.0%) Big FM 92.7 (29.9%)
Chennai	623	19	3.0%	Radio Mirchi (84.0%) Suryan (16.0%)
Panaji	304	42	13.8%	Big FM (73.8%) Radio Mirchi (21.4%)
Bangalore	548	22	4.0%	Big FM 92.7 (95.5%)

9. Findings and suggestions

This section presents the results of this evaluation study and suggestions thereof.

What was the 'people think' about tourism

Public disposition towards tourism was assessed through respondents' rating of four statements- 'tourism is good for the country', 'tourism creates job opportunities', 'tourism brings wealth,' and 'tourism brings peace and harmony'. Overall, the respondents were positive about the phenomenon of tourism. Understandably, tourism service providers, who were directly related to creation and delivery of tourism related services, were most positive about tourism. Homemakers, within the confines of their households, were least positive. However, they can play an important role in shaping opinion.

Several studies have suggested that tourism in northern region of India is more competitive, and service providers are aggressive. Perhaps, this has led to the respondents from the north to be most positive about tourism.

Interestingly, positive disposition of publics for tourism appears to have little correlation with tourism related performance of the states. States rated best for tourism were ranked lower on respondents' positive disposition towards tourism. Respondents from smaller states of northern India viz., Jammu and Kashmir, Punjab, Himachal Pradesh, and Haryana, appear to be positively disposed towards tourism. However, in south, respondents from Tamil Nadu were among the positively disposed.

An interesting finding is that a stakeholder's disposition towards tourism is reflected in his/ her belief about how well a tourist is treated. The more strongly an individual thinks that tourism is good, the more they feel that treatment meted to tourists is not good, and should be better.

A less educated and lower income group respondent is less positive about the goodness of tourism. It was also observed that higher the level of education, more the individual believes that treatment meted to tourists is less good. So is the case with higher income groups. One can infer that less educated and lower income groups' respondents believe less that tourism is good, and therefore agree relatively less that tourists are not properly treated.

Efforts should be made to reach out to the marginalised segments of the society (less educated, lower income groups), to educate them about the goodness of tourism. This would also contribute to their positive disposition towards tourism and tourists.

Opinion about the issue of treatment meted to tourists

There appeared to be helplessness about improper treatment to tourists. While large numbers of respondents believe that tourists are not properly treated and this should be controlled, they also feel that there is hardly anything that can be done. Again, this helplessness was visible more in north India than in other regions.

Almost a quarter of respondents (25.7%) have personally come across situations where tourists were cheated or harassed. This is alarming.

Campaigns like this one are important to increase the visibility of the issue, and to increase the ability of public to register incidents of improper treatment to tourists. This will be an important first step towards shaping public opinion in favour of desired good behaviour towards tourists.

Who is responsible for good behaviour towards tourists?

An overwhelming 70% of respondents believe that it is government's responsibility to ensure good behaviour towards tourists. Of the different stake holders, the direct service provider, i.e. the tour operator, was considered to be the least responsible for ensuring good behaviour towards tourists as compared to other three listed stake holders. Respondents considered it primarily the responsibility of the government, followed by the responsibility of the general public and police.

Visibility of government's efforts to ensure good behaviour towards tourist was low and was relatively higher in larger cities. While fewer believed that government is not doing anything, a large number was not aware of the government's efforts.

Government envisages different mechanisms to ensure that tourists are properly treated. Yet, its ability to directly intervene in all situations is restricted. An important player is general public, who would be party to most of tourist's experiences and untoward incidents. Government must therefore own and continue to own responsibility to educate public for desirability of good behaviour towards tourists.

Government should focus more on northeast region in conveying to the public their intentions and efforts in ensuring good behaviour towards tourists. The government should make its efforts more visible in the eastern region also.

How effective was the campaign?

'Effectiveness of campaign' has two connotations. One, whether the campaign reached the targeted audience and the message went across. Two, was the campaign successful in achieving desired behavioural/ attitudinal changes.

The campaign was very effective in terms of its recall. 80% respondents were able to recall the advertisement. Further, the message in the commercial was

understood by almost 98% of respondents who could recall it.

Recall was relatively poor in south, especially in smaller cities of south India. This was perhaps because of low penetration of Hindi in south India (the commercials were in Hindi).

Except for one commercial released in 2009, almost all advertisements depict a tourist as a foreign national. The powerful campaign is therefore interpreted as desiring good behaviour towards international tourists and it is left to the imagination of the viewer to include domestic tourists, or not. 'Atithi' means guest; guests come from outside. Therefore by default domestic tourists are not considered guests.

Campaign in local language, especially in south India would be more effective.

Another suggestion is that government should come up with a separate campaign for good behaviour towards domestic tourists. Domestic tourism market is almost 100 times the foreign tourist market. In this case the commercials may address desirable behaviour towards domestic tourists, and responsible behaviour by these tourists.

Where was the advertisement seen/ heard?

Most of the respondents were exposed to the commercials on TV. Less than one percent respondents reported listening to the commercial only on FM radio.

Further, FM channels are more popular in the morning while TV is popular during the evenings.

More focus should be on TV than on FM channels. However, FM channels can be used during morning slots.

Awareness about the issue

About three-fourth of the respondents (77.6%) say that they were already aware of the issue before the commercials were aired. However, this response needs to be understood with care. There was no pre-campaign study done, which provides a measure of awareness about the issue before the campaign.

Three-fourth of those who were not aware about the issue (73.9%) before they were exposed to the commercial, maintained that the commercial forced them to think about the issue.

Most respondents feel that the campaign has succeeded in raising awareness about the issue. Respondents believe that government's efforts will make a difference. An overwhelming 93.5% of respondents want government to continue with the campaign.

The commercial can be considered successful in raising awareness. It generated

interest in the issue as majority of respondents reported discussing the issue with friends and relatives.

The campaign should be continued with little changes in media plan and focus on regions.

Change in attitude

The study tried to assess if the campaign was instrumental in bringing about change in respondents' attitude in terms of their readiness to act in the event of inappropriate behaviour towards tourists.

96.8% respondents agreed with the issue raised by the campaign. However, it may be noted that experience suggests that in case of evaluation of social awareness campaign respondents tend to answer what is acceptable rather than what they would actually do.

After the campaign people felt empowered and were willing to act to prevent any unpleasant behaviour with tourists.

Content of the message

Respondents found it is easy to comprehend the underlying message. They were able to understand the message and were by and large comfortable with the language used. Understandably, this proportion was less in south India.

Decision-makers may consider a regional level campaign with a regional content, or one at least in English.

Choice of brand ambassador.

Respondents appeared to be satisfied with the choice of Mr. Aamir Khan as brand ambassador. This may not necessarily be because of the brand ambassador, but because they do not have sufficient reasons to suggest a change or have limited imagination to suggest an alternative brand ambassador. Some respondents (18.7%) from south have suggested an alternative brand ambassador.

In case a regional level campaign is contemplated, a local celebrity may be considered. However, the southern region is too fragmented to have a common celebrity for the entire south. It may also be considered to have local campaigns in different parts of south India.

Viewership/ Listenership

Clearly, most of the respondents have viewed the commercial on television. The proportion of viewers who have listened to the commercial on the FM channel is less than one percent. However, TV is more popular during the evening while FM channels are clearly popular during the morning hours. FM channels are

proportionately more popular with younger public.

An integrated communication strategy may consider the above. More TV slots may be used in the evening, while FM channels should be used more during the morning. Viewership of commercials was significant on certain channels only. Media plan should address this.

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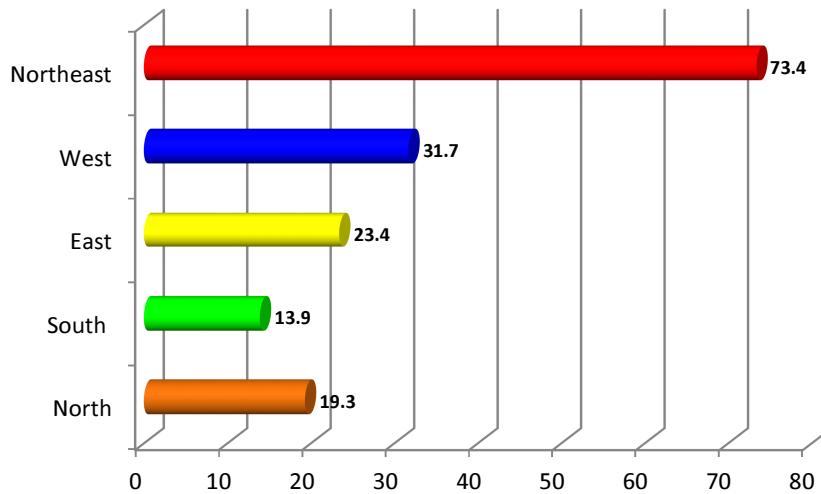
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Annexure 1: Campaign for the promotion of tourism in north-east region

Only 28% respondents have reported seeing the commercial for promoting tourism in the north-eastern region of the country. For obvious reasons, the proportion of those who saw the commercial was higher in NE (73.4%). Advertisement was noticed least in South (13.9%).

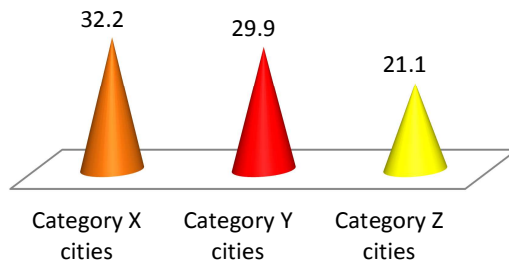
Figure: Percentage of viewers within the region who saw the commercial for promoting tourism in north-eastern region



Top five states/ UTs in terms of descending order of visibility of the commercial outside the north-eastern region were Goa (78.1%), Andaman and Nicobar Islands (63.5%), Madhya Pradesh (49%), Odisha (41.2%) and Uttar Pradesh (41%).

Visibility of commercial was more in smaller (category Z) cities and reduced inversely.

Figure: Percentage of viewers within the different categories of cities who saw the commercial for promoting tourism in north-eastern region

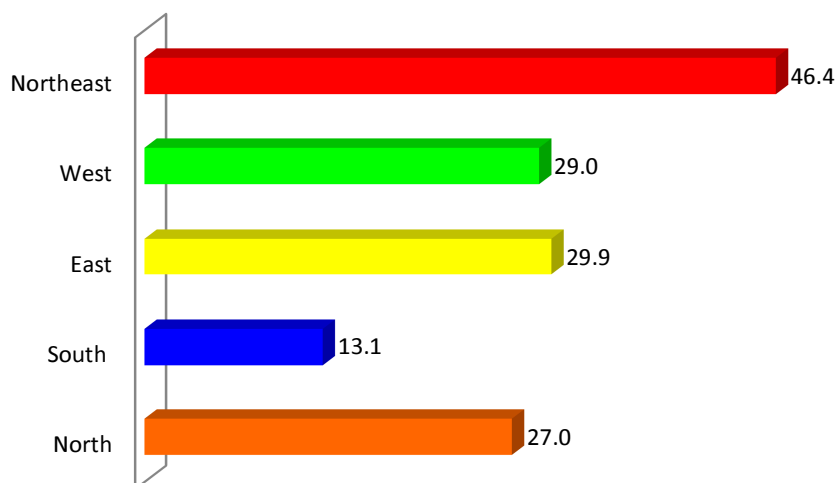


Of those who reported seeing the commercial 82.8% described it correctly (culture-51.3% and different states- 31.5%). This confirms with fair certainty the viewership.

Annexure 2: Campaign for the promotion of tourism in Jammu and Kashmir

Only 26.6 % respondents have reported seeing the commercial for promoting tourism in Jammu and Kashmir. In this case also the proportion of those who saw the advertisement was highest in NE (46.4%). Advertisement was noticed least in South (13.9%).

Figure: *Percentage of viewers within the region who saw the commercial for promoting tourism in Jammu and Kashmir*



Some states/ UTs in terms of descending order of visibility (highest to lower) of the commercial outside the north-eastern region were Andaman and Nicobar Islands (65.4%), Arunachal Pradesh (54.4%), Goa (54.2%), Sikkim (47.3%), Uttar Pradesh (46.3%), Assam (44.1%), Madhya Pradesh (42.9%) and Maharashtra (41.2%).

Visibility of commercial was more or less same in all categories of cities (category Z cities- 25.9%; category Y cities- 27.1% and category X cities-26.8%). Larger proportion of younger people reported seeing the commercial for promotion of tourism in Jammu and Kashmir.

Table: *Percentage of viewers of different age groups who have reported seeing the commercial*

<i>Age</i>	<i>Percentage of those who have seen the commercial</i>
Less than 20 years of age	31.9%
Between 20 and 35 years of age	26.2%
More than 35 years of age	24.2%

Of those who reported seeing the commercial 83.3 % described the commercial correctly (culture- 50.7% and different seasons- 32.6%). This confirms with fair certainty the viewership.

Annexure 3: Research Team

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