

# **Incredible India**

**Govt. of India  
Ministry of Tourism  
Market Research Division**



## **INTERNATIONAL PASSENGER SURVEY 2003**

### **FINAL REPORT**

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**By**

**Horizon Industrial Consultancy Services  
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# CHAPTER I

## EXECUTIVE SUMMARY

- 1.1 The Department of Tourism (DOT), Government of India, commissioned the International Passenger Survey in the year 2003 and Horizon Industrial Consultancy Service were entrusted by the Department for undertaking the one-year long survey. The sample comprised 18,000 Foreign Nationals, 10,000 Indian Nationals and 2000 Transit Passengers. Statistical techniques have been employed to estimate the total number of passengers departing from the select airports / land posts during the survey period (January – December 2003). The survey covered four major airports (Chennai, Delhi, Kolkata and Mumbai), 10 other airports (Ahmedabad, Amritsar, Bangalore, Goa, Hyderabad, Kochi, Kozhikode, Thiruvananthapuram, Trichy and Varanasi) and three land posts (Raxaul, Sounali and Haridaspur). It was carried out for one year, one week in each month (January- December- 2003) in respect of major airports and for six months (one week in each month) in respect of other airports and land posts.
- 1.2 Since one of the principal objectives of the survey was to collect relevant data on inbound tourism for preparing Tourism Satellite Accounts (TSA) for India, suitably designed questionnaires in line with WTO / UN guidelines were administered amongst respondents to obtain the required expenditure data. At the instance of the Cabinet Secretariat, as advised by DOT, airport facilities were also included in the survey. A summary of survey findings is given in the following paragraphs. The highlights have been presented in different sections, (A) Foreign Nationals, (B) Indian Nationals (NRIs) (C) Resident Indians going abroad, (D) Transit Passengers and (E) Airport Facilities.

### A. FOREIGN NATIONALS

#### *DEMOGRAPHICS*

- 1.3 An estimated 26,19,458 foreign tourists departed from various exit points covered in the survey during the period January to December 2003. The 15 major countries (excluding Bangladesh) accounted for 61.90% of foreign nationals who departed from India during the period January – December 2003. Out of these 15 countries, UK (16.40 %), USA (14.08%), Sri Lankan (4.87%) Canada (3.83%), France (3.26%), and Germany (3.13%) accounted for about 46% of the total foreign nationals.

#### *Gender*

- 1.4 Nearly 75% of foreign tourists who visited India were males. The ratio varied from country to country. While amongst the Sri Lankan tourists the ratio of males at 96.49% was the highest, the same was lowest at 27.27% in the case of Australian tourists.

### **Age**

- 1.5 The tourists were classified into five-age groups viz., upto sixteen, seventeen to thirty, thirty one to thirty five, thirty six to sixty five, and over sixty-five. Nearly 49.12% of the tourists belonged to the age-group thirty six to sixty five, the next highest group was seventeen to thirty (20%) and about 18% belonged in the thirty one to thirty five age group. Tourists below sixteen years of age accounted for 5.12% and above sixty-five years accounted for 2.36%.

### **Marital Status & Education**

- 1.6 The tourists were also classified on the basis of their marital status & educational levels. The survey reveals that nearly 63% of the foreign nationals visiting India were married. Education wise, graduates and postgraduates accounted for around 80 % of the foreign nationals who visited India.

### **Occupational Distribution**

- 1.7 Classification of Tourists was made according to their occupational status. These included six categories viz., Services, Professionals, Self-employed, Business, Students and Housewife. While professionals accounted for 31.79%, followed by 31.17% business class, 16.02% Services, 8.96% Students, 8.68% Self-employed and 3.38% Housewives. Professionals and Services constituted 48 % in the case of UK nationals, 68% in respect of USA, 51% in respect of Canada and 61% of Japanese tourists. The share of Business occupation was the highest in the case of Sri Lanka at 78% followed by Israel 60%, South Korea 43 %, France 35%, Canada 33%, USA 24%, the lowest was that of Australia at 10%.

### **Income Brackets**

- 1.8 The tourists were distributed by their annual income into five categories viz., less than Rs.50, 000, Rs. 51,000 to 100,000, Rs.100,000 to 200,000, Rs 200,000 to 400,000, Rs. 400,000 to 800,000, and above Rs. 800,000. The survey revealed that around 75% of the foreign tourists belonged to the Annual Average Income of above Rs. 800 thousand.

## ***EXPENDITURE PATTERN***

### **Package Tourists**

- 1.9 Of the total tourists only 6.72% were package tourists. The share of package tourists among the top 15 countries came to 7.47% of the total tourists. 12.30% of the tourist from UK came by package tour, followed by Germany (8.87%), Netherlands (8.23%), Japan (7.79%), Italy (6.32%), USA (6.19%), South Korea (5.60%) and France (4.52%).
- 1.10 The average cost of package tour for trip in India was Rs. 48,613 per tourist and the average duration of stay for package tourists was 15 nights. The average package cost

was highest in the case of USA (Rs.88,568) followed by Canada (Rs.79,533), Italy (Rs. 72,278), Israel (Rs 65,085), Netherlands (Rs 47,989), Germany (Rs 45,072), Japan (Rs 43,259), France (Rs 34,033) and Singapore (Rs 34,146).

### **Additional Expenditure**

- 1.11 Tourists who came on package also incurred expenditure in India over and above package tour cost. On an average this expenditure was Rs 20,910 per tourist. Among the top 15 countries it was the highest at Rs 80,875 in the case of Sri Lanka, Rs 65,085 in the case of Israel followed by Canada (Rs 57,565), Italy (Rs 46,460), Singapore (Rs 26,614), Germany (Rs 20,221), UK (Rs 18,362), Malaysia (13,723) and Australia (Rs 11,721) etc.

### **Non- Package Tourists**

- 1.12 The average expenditure in India of non-package tourists is estimated as Rs 45,504. Among top 15 countries this expenditure was the highest in respect of Canada (Rs 93,760) followed by Israel (Rs 85,119), Sri Lanka (Rs 81,608), USA (Rs 66,254), Australia (Rs 64,701), Japan (Rs 62,487), South Korea (Rs 50,339) and Germany (Rs 50,546). The average duration of stay for a package tourist was estimated as 15 nights, while the average duration of stay for all tourists is 16 nights. The average duration of stay was 20 or more nights in respect of tourists from Canada (20 nights), Belgium (25 nights), Czech Republic (25 nights), Kazakhstan (24 nights), Poland (20 nights), Sri Lanka (23 nights) and Bahrain (21 nights).
- 1.13 Item wise break up of expenditure of Non-package foreign tourists shows that 18.20% expenditure was incurred on accommodation, 15.25% on food and beverages, 16.46% on internal transport, 9.58% on travel services, 6.60% on cultural & recreational services, while the remaining 33.90% on other connected goods & services.
- 1.14 For Package and Non-package tourists combined, the total average expenditure per tourist in India was Rs. 43,852 and average pre trip expenditure was Rs. 33,294. Thus average expenditure for the trip to India was Rs 77,146 per tourist. Of the total average expenditure of Rs. 77,146 per tourist, on an average a tourist spent Rs 13,123 on shopping, which is 17% of the expenditure of a foreign tourist. The breakup of shopping expenditure shows that there is no specific pattern and varies from country to country. Common items of shopping were Textile (25.36% of shopping expenditure), Personal Goods (22.50%), Handicrafts (15.11%), Gems and Precious Stones (13.56%), Jewellery (13.86%), Carpets (4.39%), Books & reading material (2.16%), and others (3.08%).

## ***TRAVEL PATTERN***

- 1.15 The analysis of travel pattern shows that 40.84% of tourists traveled alone, 22.96% traveled with two persons, 28.38% traveled in a group of 3 to 5 persons, 4.39% in a group of six to ten persons, while 2.11 % in a group of eleven to fifteen persons, only 1.31% traveled with a group of above fifteen persons. A further analysis shows that 7.91% foreign tourists travelled with spouse only, 9.17% with friends only, 16.28%

with spouse, friends and children, 4.97% with parents only, with remaining traveling in various combinations of spouse, children, parents, friends etc.

- 1.16 The major mode of travel within India used by foreign tourists shows that almost one third used Air, another one-third used Rail and remaining one-third used Road.

### ***MOTIVATIONAL FACTORS***

- 1.17 The survey shows that 45.45% tourists visited for leisure, recreation & holiday, 23.00% for business purposes and 12.24% for religion and pilgrimage, 12.01% visited to meet friends and relatives in India, 2.20% for health & medical treatment while the remaining 4.40% visited India for other purposes.
- 1.18 A little over 47% of tourists availed budget accommodation, only 20% preferred star hotel and 11% made use of the hospitality friends & relatives. Guest houses (9.72%) and Private rented accommodation (8.89%) were also popular with foreign tourists. Remaining tourists used Youth hostels, Tourist camps, Conference centres or others as mode of accommodation..

### **Factors considered as important in choosing a destination and Experience in India on those factors**

- 1.19 Almost 1/3 of the foreign tourists considered the factors such as, Tourist attraction, Climate, Expensiveness, Safety and security, Public hygiene and cleanliness, Culture & History, Friendliness of people. Ease of communication with local people, Shopping facilities, Road, Facilities at airport, International travel facilities and Good hotels as 'Very Important' factors while choosing one overseas destination over another. Local travel facilities by rail and road were considered 'Very Important' by 27% and 28% of the tourists respectively. Local travel by air was considered as Very Important by almost 32% of the tourists. About their experiences in India on these factors, about 13% recorded their experience in India as 'Very Good', while 48.16% recorded as 'Good' and 17.72 % as 'Average', while 23.44% were not happy and recorded as 'Poor'. Further, 74.30% tourists considered landscape/scenic beauty as primary factor in choice of a destination, followed by Monuments/Archaeological sites (49.99%), Museums/Art galleries (47.28%) and Cities/Markets (44.206%)

### **Repeat Visits**

- 1.20 While 50.20% of the tourists visited India for the first time, for 14.32% it was the second visit, 11.37% third visit and almost 9.98% of them had visited India more than five times on earlier occasions.

### **Source of Information**

- 1.21 Previous visits constituted major (40.74%) source of information, followed by friends & relatives (35.54%), travel agents/tour operators (7.78%), travel magazines/films/T.V. etc. (5.31%). Government of India tourist offices (1.31%) &

Indian Diplomatic Missions (3.31%) were not significant as a source of direct information to the tourists.

### ***TOUR PLANNING***

- 1.22 The average duration taken by the foreign tourist for taking the decision to visit India in advance was a little above 7 weeks with a majority (52%) of them took the decision more than four weeks in advance. The average duration of advance booking of the tickets was 4.4 weeks, with more than 51% of the tourists booking their tickets more than 3 weeks in advance. While almost 46% of the visitors used the services of travel agents, 10% utilized the services of tour operators for making their travel arrangements, about 37% arranged the same themselves, while for the remaining 7% travel arrangements were made either by office/employer or by others.

### ***EVALUATION***

- 1.23 The tourists were asked to evaluate their over all visit to India by rating it as per the satisfaction level as Most satisfying, Satisfying, Average and Disappointing. 35.73% of the tourists evaluated their overall visit to India as Most Satisfying, 48.94% rated it as Satisfying, 12.05% as Average and only 3.28% rated it as Disappointing. Further, 76.64% indicated that they would like to visit India again, while 80.95% remarked that they would advise their friends to visit India.

## **B. INDIAN NATIONALS: NON-RESIDENT INDIANS (NRIs)**

### ***DEMOGRAPHICS***

- 1.24 During the period of the survey, viz, January to December 2003, 16,64,817 NRIs departed from India through various exit points. The highest numbers were recorded from U.K. (11.20%), followed by U.S.A. (9.67%), Canada (9.27%), Sri Lanka (9.13%), U.A.E. (7.22%) and Sudan (5.01%) being the countries with more than 5% share.

#### **Gender, age, marital status and education**

- 1.24 The male NRIs accounted for 77% of the total and females represented the remaining 23%. The ratio was more or less similar to almost all the countries except Mauritius (50%), Indonesia (62%), and Philippines (67%). The majority of NRIs belonged in the age group of above 36-65 years (45.71%), followed by 17-30 years (29.71%), 31-35 years (17.48%), below 16 years (4.19%) and above 65 years (2.19%). About 74% NRIs visiting India were married. Almost 44% of the NRIs were Undergraduates, 39% were Graduates with the remaining 17% were Postgraduates.

#### **Occupation**

- 1.25 Occupation profile of the NRIs shows that 52.31% had Service as occupation, 16.72% were Professionals, 3.68% Self-employed, 2.39% Students and 4.98% Housewives

## ***EXPENDITURE PATTERN***

- 1.26 The average expenditure incurred by an NRI tourist was Rs. 48,287, out of Rs 9,768 was pre trip expenditure and Rs 38,519 was expenditure in India. The NRI tourists from UK were the highest spenders in India with an average expenditure of Rs 50,798 per tourist, followed by NRIs from Australia (Rs 47,600), France (Rs 44,574), Malaysia (Rs 43,338) and USA (Rs 42,549). The average duration of stay for an NRI tourist in India was 33 days.
- 1.27 Average shopping expenditure per NRI tourist was Rs 21,988, which is 45.54% of the total average expenditure of Rs 48,287 per NRI tourist. The highest ratio was recorded in case of Mauritius at 68%. The NRIs, who spent more than 50 % of their expenditure on shopping included NRIs from Afghanistan, Bangladesh, Denmark, UK, Maldives, and Sri Lanka, UAE and New Zealand. NRIs spent 20.27% of the shopping expenditure towards Personal goods, 18.67% on Textiles, 16.95% on Jewellery, 10.63% on Gems/Precious stones and the remaining on Carpets (3.59%), Handicrafts (5.43%), Books/reading material (4.28%) and 20.18% on Other items.

## ***TRAVEL PATTERN***

- 1.28 About 70% of NRIs travelled alone, 17% travelled in group of two, while 13% traveled in a group of 3 to 5 members. A breakup of the composition of travel group shows that while 70% NRIs travelled singly, 17% traveled with spouse and 6.4% travelled with spouse, children and parents, while remaining traveled in various combinations as indicated in table 3.39.

### **Mode of travel**

- 1.29 For traveling within India, all the modes of travel have been utilized by NRIs. Most widely used mode is Rail (49.39%), followed by Road (50.01%) and Air only (1.23%).

### **Purpose of visit**

- 1.30 Leisure and Recreation was the purpose for 29.32%, while religious and pilgrimage was main purpose for 25.23%, business & profession (19.71%), visiting friends & relatives (13.91%), health & treatment (9.71%), and others (2.11%).

### **Factors considered Very Important in choosing an overseas destination and experiences in India on those factors**

- 1.31 Almost 85% or more of the NRI tourists considered the factors such as, Tourist attraction, Climate, Expensiveness, Safety and security, Public hygiene and cleanliness, Culture and History, Friendliness of people, Ease of communication with local people, Road, Facilities at airport, International travel facilities and Good hotels as Very Important while choosing one overseas destination over another, while Shopping facilities were considered as Very Important by 65% of the NRI tourists.

About their experiences in India on these factors, only 5.15% recorded their experience in India as 'Very Good', 72.79% recorded as 'Good' and 9.60% as 'Average', while 12.46% were not happy and recorded as 'Poor'.

## **C. INDIAN RESIDENTS TRAVELLING ABROAD**

- 1.32 A total of 24,96,492 Indian Residents are estimated to have gone abroad during the period January 2003 to December 2003.

### ***DEMOGRAPHICS***

#### **Gender and Age**

- 1.33 A majority of Indians traveling abroad were males (71.64%) with females accounting for 28.36%. Nearly 36% of the outbound travelers were in the age group 17-30 years, nearly 30% in the age group 31-35 years and 28% in the 36-65 age group.
- 1.34 Occupation wise distribution of Indian residents traveling abroad shows that 36% of them were engaged in Service (or worked as employees), followed by 22% with business as occupation, 16.65% Housewives, 10.31% Professionals, 5.76% Self-employed and 9.31% Students.
- 1.35 A majority of Indians going abroad were traveling alone and accounted for 57.54% of the total travelers with 15.79% traveling in twos, 22.84% in group of 3 to 5, 3.11% in group size of 6 to 10, while remaining traveling in group size greater than 10.
- 1.36 For traveling within the country Air (55.63%) was the main mode of transport used by Indian residents travelling abroad, followed by Rail (13.73%) and 30.64% by road.
- 1.37 87.31% of the total tourists paid normal fares, while 10.32% availed excursion and 2.36% made use of concession fares.

#### **Frequency of Travel**

- 1.38 An analysis of the previous visits of Indian Residents going abroad shows that 23.60% went abroad every year, while 8.97% went abroad every alternate year. 12.45% of the respondents traveled abroad once in five years, while 15.93% indicated no specific intervals for travel abroad.

#### **Purpose of Visit**

- 1.39 Employment was the major purpose of going abroad for 25.23% of these Indians, followed by Business & profession (19.33%), Leisure, recreation & holiday (15.93%), visiting friends & relatives (4.18%), Studies (14.58%), Religion & pilgrimage (11.65%), and others (9.10%).

## **D Transit Passengers**

- 1.40 Fourteen countries namely UK (9.55%), USA (9.10%), Nepal (9.04%), France (8.25%), Australia (6.85%), Denmark (6.55%), Canada (4.65%), Thailand (4.55%), Japan (3.80%), Netherlands (3.65%), Singapore (2.95%), Spain (2.90%), Russia (2.50%), and South Africa (1.40%) accounted for a share of more than 1% each and totally accounted for 75.74% of the total transit passengers.

### ***DEMOGRAPHICS***

- 1.41 Almost 63.50% of the transit passengers were males while the remaining 36.50% were females. While 43.30% were in the age-group 31-35 years, 29.05% were in the age group 17-30 years, 27.10% in the age group 36-65 years and remaining were either below 16 years or over 65 years of age. Of the total 65% were married and 35% were not married. About 20% of transit passengers were undergraduates, 27% were graduate and 53% were postgraduates.
- 1.42 Occupation wise distribution of transit passengers shows that almost 40.20% had Business as their occupation, with 22.35% being with Service as occupation, 22.35% were Professionals, while the remaining were Self employed (13.50%), Students (7.95%) or Housewives (0.65%).

### ***TRAVEL PATTERN***

- 1.43 46.50% of transit passengers traveled alone, 32.30% traveled in-group of two persons 12.90% in the group of 3-5, 6.85% in the group of 6-10, 1.45% in the group of 11-15.

### **Reasons for not visiting India**

- 1.44 45% of transit passengers lacked time to visit India, 21% had already visited India, while 25% mentioned that there was no time and another 9% had budget constraints. This was the general pattern for all countries except for transit passengers from Canada, Germany and UAE. 65% of the transit passengers from these countries (Canada, Germany and UAE) expressed time constraint for not visiting India. Around 80% of transit passengers for North Africa and Caribbean countries also mentioned time constraint. Over 90 % of transit Passengers from South America had visited India earlier and as such did not visit India this time.

## **E Airport Facilities**

- 1.45 At the suggestion of the Cabinet Secretariat, Horizon was advised to taken up survey of Airport Facilities as well. The normal survey had already started and three months were over. The Airport Facilities Survey was therefore taken up from the month of April. Four major airports, namely Mumbai, Delhi, Kolkotta and Chennai were included in the Airport Facilities Survey and a total of 18,824 passengers were covered.

- 1.46 A suitable questionnaire was framed for eliciting information from respondents. The main characteristics covered included: General Ambience, Entry/Exit, Cleanliness, Information and Sign Boards, Check-in-Facilities, Money Changing, Passport Control/Immigration Check, Customs Clearance, Luggage Handling, Lounge, Toilets, Refreshment Stalls/Cafeteria, Taxi Services, and Airport Bus Services.
- 1.47 The respondents were asked to rank these facilities as 'Very Good', 'Good', 'Average' and 'Poor'. Almost 80% of respondents reported General Ambience as 'Average', 10% each as 'Good' and 'Poor'. Almost 90% respondents were not satisfied at the Cleanliness and rated as 'Average'. Majority reported Information and Signboards as 'Average'. Check-in facilities were reported as 'Poor' by almost 40% of the respondents. Passport Control/Immigration Check were found to be 'Good' by around 60%. More than 90% of the passengers reported Customs Clearance as 'Good' and more than 80% reported Luggage Handling as 'Average'. 95% of the respondents found Toilets as poor. Refreshment stalls/Cafeteria were reported to be 'Poor' by large numbers. Taxi Services and Airport Bus Services were reported to be 'Poor' by more than 90% of the respondents.

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## **CHAPTER II**

### **BACKGROUND, APPROACH AND METHODOLOGY**

- 2.1 With the adoption of Tourism Satellite Accounts (TSA) by the United Nations Statistical Commission (UNSC) as a methodological framework for developing credible measures of economic impacts of tourism, several countries in the world have developed their TSA, while many others are in the process of developing the same.
- 2.2 The Department of Tourism conducted a feasibility study in 2001 for developing India's TSA and as a follow-up of the recommendations in the feasibility study, two large scale sample surveys were taken up in the years 2002 and 2003, first one a 'Domestic Tourism Survey' to collect data on various aspects of domestic tourism and the second 'International Passenger Survey'.
- 2.3 The Department of Tourism (DOT), Government of India conducted the International Passenger Survey in the year 2003 and M/s Horizon Industrial Consultancy Services were entrusted by the Department for undertaking the one-year long survey. A Pilot Survey was carried at the IGI airport, New Delhi during the period December 13 to 31, 2002. Regular survey was started at various exit points in the month of January 2003 as per the schedule and completed at the end of December 2003. The survey targeted the following four categories of International tourists:
- (i) Foreign nationals visiting India,
  - (ii) Non-Resident Indians visiting India
  - (iii) Indian Residents traveling abroad and
  - (iv) Transit Passengers.

### **OBJECTIVES OF THE SURVEY**

- 2.4 The survey was conducted with the following objectives:
- (i) To assess demand profiles of the foreign tourists visiting the country, which may include demand for tourist places, tourism goods and services including transport and accommodation, food & beverages, travel agencies, tour operators, cultural services, recreation and other entertainment services.
  - (ii) To assess the detailed expenditure pattern of foreign tourists visiting India, and estimates of total expenditure at all India level on specific tourism products such as accommodation, food & beverage services, passenger transport, travel agency, tour operators and tourist guide services, transport equipment on rental, cultural services, recreation and other entertainment services and other tourism related products and services including expenditure on package tours.
  - (iii) The non-monetary tourism transactions acquired from the residents and non-residents are to be estimated.
  - (iv) To evaluate the performance of existing tourist facilities in the country.
  - (v) To assess the number of outbound tourists to various countries.
  - (vi) To undertake market segmentation analysis.

- (vii) To estimate the average duration of stay of foreign tourists in India including country-wise details.
- (viii) To obtain demographic, economic and social profiles of foreign tourists visiting India and the motivational factors responsible for attracting them to India.

## SAMPLE SIZE

- 2.5 A sample of 30000 tourists was surveyed. The total sample of 30,000 tourists comprised 18,000 foreign nationals, 10,000 Indian Nationals and 2,000 transit passengers. The sample tourists were contacted for collection of detailed information in a structured schedule at 17 exit points, which included 14 airports and 3 land checkpoints. The total sample of 30,000 tourists was allocated amongst the selected exit points as indicated in Table 2.1.

**Table 2.1: Allocation of Sample to Exit Points**

	Airport/ Land-post	Sample Size			Duration of the Survey
		Foreigners	Indians	Transit	
1	Delhi	6200	2200	1000	12 months
2	Mumbai	5900	3800	800	12 months
3.	Chennai	2300	1400	100	12 months
4.	Kolkata	900	400	100	12 months
5.	Ahemdabad	100	100	---	6 months
6.	Amritsar	300	250	---	6 months
7.	Bangalore	200	150	---	6 months
8.	Goa	550	50	---	6 months
9.	Hyderabad	100	100	---	6 months
10.	Kochi	50	300	---	6 months
11.	Kozhikode	50	300	---	6 months
12.	Thiruvnanthapuram	400	750	---	6 months
13.	Trichy	100	50	---	6 months
14.	Varanasi	100	---	---	6 months
15.	Haridaspur	550	150	---	6 months
16.	Raxaul	50	---	---	6 months
17.	Sounali	150	---	---	6 months
	<b>Total</b>	<b>18000</b>	<b>10000</b>	<b>2000</b>	

*Grand Total = 30,000*

## SELECTION OF PASSENGERS

- 2.6 A stratified two-stage sampling was adopted for the selection of passengers for the Survey. Each of the selected exit point was treated, as a stratum and first level of sampling was time sampling. In the case of four airports, namely Delhi, Mumbai, Chennai and Calcutta, 52 weeks of the year were grouped into 13 periods of 4 weeks each. A week in each period was systematically selected by selecting a random number between one and four and taking four as interval of selection. Each period of 13 weeks was assigned to one of the four airports at random.

- 2.7 In the case of other exit points, one week each was selected both in peak season (November to January) and in lean season (April to June) at random. For Goa two weeks were selected between October and February at random.
- 2.8 All the flights departing from the selected airports during the selected survey period were covered in the survey and the passengers were selected at random on the basis of their entry into the respective lounges. Both the first class and executive class passengers were selected at random from the entry coupons and the economy class passengers were selected on the basis of the seats occupied by them in the lounge. The passenger selected was post stratified by aircraft and by taking additional samples. The weighting for estimation was thus the airport by first class, executive and economy class separately during the survey period.
- 2.9 In the case of land check posts passengers were selected at random on the basis of their arrival at the check post. The weighting for estimation in these cases was the number of foreign and Indian passengers departed through this check-post during the survey.

### **REFERENCE PERIOD**

- 2.10 The survey was conducted during the calendar year 2003 (January to December) The frequency of the survey at different exit points is given in Table 2.2

### **SURVEY TEAM AND ORGANISATION**

- 2.11 Teams of surveyors were appointed for each of the port. A Survey Supervisor was positioned at each exit point and was responsible for assigning shifts, checking of questionnaires and obtaining the necessary approvals for conducting the survey activities led by each team. Supervision was intended to minimize the errors during the actual collection of data. The Supervisor also collected the immigration data on passenger departures from the airports. Adequately trained and experienced field staff were identified and put in place at various exit points. Written guidance was given to field investigators to ensure uniformity in data collection, concepts and definitions of the survey and to facilitate their work at the respective airports. A meeting of all the investigators and team leaders/supervisors who were involved in the field survey was held at central places like Bangalore/Delhi/ Mumbai before the commencement of the fieldwork and periodical review meetings were also held from time to time.

**Table 2.2: Schedule of Survey**

S.No	Month	Week		Major Air Ports	Other Airports / land posts
1.	January 2003	01-01-03 08-01-03 15-01-03 22-01-03	07-02-03 14-02-03 21-02-03 28-02-03	Kolkata Mumbai, Delhi, Chennai	Raxaul, Sounali, Hyderabad, Goa, Kochi, Kozhikode TVM
2.	February 2003	01-02-03 08-02-03 15-02-03 22-02-03	07-02-03 14-02-03 21-02-03 28-03-03	Kolkata Mumbai Delhi Chennai	Raxaul, Sounali, Hyderabad, Goa, Haridaspur, Kochi, Kozhikode, TVM
3.	March 2003	01-03-03 08-03-03 15-03-03 22-03-03	07-03-03 14-03-03 21-03-03 28-03-03	Kolkata Mumbai Delhi Chennai	Raxaul, Sounali, Hyderabad, Goa, Haridaspur, Kochi, Kozhikode TVM
4.	April 2003	01-04-03 08-04-03 15-04-03 22-04-03	07-04-03 14-04-03 21-04-03 28-04-03	Kolkata Mumbai Delhi Chennai	Raxaul, Sounali, Hyderabad, Goa, Haridaspur Kochi, Kozhikode, TVM
5.	May 2003	01-05-03 08-05-03 15-05-03 22-05-03	07-05-03 14-05-03 21-05-03 28-05-03	Kolkata Mumbai Delhi Chennai	Raxaul, Sounali, Hyderabad, Goa, Haridaspur, Kochi, Kozhikode, TVM
6.	June 2003	01-06-03 08-06-03 15-06-03 22-06-03	07-06-03 14-06-03 21-06-03 28-06-03	Kolkata Mumbai Delhi Chennai	Raxaul, Sounali Hyderabad, Goa, Haridaspur Kochi, Kozhikode TVM
7.	July 2003	01-07-03 08-07-03 15-07-03 22-07-03	07-07-03 14-07-03 21-07-03 28-07-03	Kolkata Mumbai Delhi Chennai	Trichy, Bangalore, Ahemdabad, Amritsar, Varanasi
8.	August 2003	01-08-03 08-08-03 15-08-03 22-08-03	07-08-03 14-08-03 21-08-03 28-08-03	Kolkata Mumbai Delhi Chennai	Trichy, Bangalore, Ahemdabad, Amritsar, Varanasi
9.	September 2003	01-09-03 08-09-03 15-09-03 22-09-03	07-09-03 14-09-03 21-09-03 28-09-03	Kolkata Mumbai Delhi Chennai	Trichy Bangalore, Ahemdabad, Amritsar Varanasi
10.	October 2003	01-10-03 08-10-03 15-10-03 22-10-03	07-10-03 14-10-03 21-10-03 28-10-03	Kolkata Mumbai Delhi Chennai	Trichy, Goa, Bangalore, Ahemdabad, Amritsar, Varanasi
11.	November 2003	01-11-03 08-11-03 15-11-03 22-11-03	07-11-03 14-11-03 21-11-03 28-11-03	Kolkata Mumbai Delhi Chennai	Trichy, Bangalore, Ahemdabad, Amritsar, Varanasi
12.	December 2003	01-12-03 08-12-03 15-12-03 22-12-03	07-12-03 14-12-03 21-12-03 28-12-03	Kolkata Mumbai Delhi Chennai	Trichy, Bangalore, Ahemdabad, Amritsar, Varanasi

## SCRUTINY AND TABULATION METHODS

- 2.12 The tabulation plan for the survey was prepared in consultation with DOT officials and was considered in a joint meeting convened by DOT with the representatives of National Council of Applied Economic Research (NCAER), Central Statistical Organisation (CSO) and DOT.

## IMMIGRATION DATA

- 2.13 The immigration data obtained from the immigration authorities was used to calculate separate sets of multiplier values for each port and for each period. These sets of multipliers when applied to their respective samples provided an estimate of the volume of inbound and outbound tourist traffic.

## SURVEY QUESTIONNAIRES

- 2.14 On the basis of need based input requirements to meet the basic objectives of the survey appropriate and scientifically structured questionnaires were designed separately for (i) Foreign National (ii) Indian Nationals (iii) Transit Passengers. A pilot Survey was undertaken at Delhi airport from December 13 to 31, 2002 to fine tune and finalize the questionnaires. The questionnaires were specially designed to obtain reliable and authentic data required for developing the Tourism Satellite Accounts (TSA). Specific components of the tourist expenditure were incorporated to reflect the expenditure pattern of the tourists.
- 2.15 At the suggestion of the Cabinet Secretariat, Horizon was advised to undertake survey of Airport Facilities. The normal survey had already started and three months were over. The survey of Airport Facilities was taken up from month of April to December 2003. Four major airports namely Mumbai, Delhi, Chennai and Kolkata were included for survey and a sample of 18,824 passengers covered were interviewed to collect information on airport facilities. Details of sample at various airports is given below:

**Table 2.3: Allocation of Sample for the Survey of Airport Facilities**

	<b>Delhi</b>	<b>Mumbai</b>	<b>Chennai</b>	<b>Kolkatta</b>	<b>Total</b>
Foreign	4650	4425	1724	675	11474
Indian	1650	2850	1050	300	5850
Transit	750	600	75	75	1500
<b>Total</b>	<b>7050</b>	<b>7875</b>	<b>2849</b>	<b>1050</b>	<b>18,824</b>

- 2.16 Questionnaires used for obtaining the required data from the respondent tourists are given in **Annex I, II, III and IV**.

## ESTIMATION PROCEDURE

2.17 The statistical formula for estimate employed in the survey is as follows:

'i' stand for any specific Port of Exit	('i'=01 to 17);
'j' for any specific sub-period	('j'=1 to 12 for Mumbai, Kolkatta Delhi and Chennai and 1 and 2 for Other Ports of Exit);
'k' for any specific Category of Passenger	('k'=1 or 2, Foreign Tourists and Indian Nationals);
'q' for any quarter	'q'=1 to 4;
'p(i)' for the number of weeks in each sub-period for ith Port of Exit	'p(i)'= 4 for Mumbai, Kolkotta ,Delhi and Chennai and 26 for others.

Also  $N(i,j,k,m)$  stand for the total number of passengers in 'm'th Flight, belonging to the 'k'th category departing from 'i'th Port of Exit in the 'j'th sub-period, and  $n(i,j,k,m)$  the total number of passengers surveyed out of  $N(i,j,k,m)$ .

X is any quantitative characteristic under study and  $x(1), x(2), x(3), \dots, x(n)$  the observations on it for  $n(i,j,k,m)$  sampled passengers in the mth flight belonging to the kth category departing from the ith Port of Exit in the jth sub-period.

An estimate of the total of the characteristic X for the 'k'th Category, 'j'th sub-period and 'i'th Port of Exit is given by

$$X(i,j,k=p(i)) \left[ \frac{f(i,j) \sum_{m=1}^{N(i,j,k,m)} \frac{n(i,j,k,m)}{N(i,j,k,m)} \left[ \frac{\sum x(n)}{n(i,j,k,m)} \right]}{N(i,j,k,m)} \right]$$

An estimate of the multiplier for the kth category, ith Port of Exit and qth quarter were obtained by taking the weighted averages of the multiplier obtained for the jth sub-periods within the qth quarter and ith Port of Exit.

## CHAPTER III

### SURVEY RESULTS

- 3.1 The results of the survey on the profile of tourists, travel pattern, tour planning, expenditure pattern, evaluation of experience etc. are presented in the following four sections:

- A. Foreign Nationals
- B. Non-Resident Indians
- C. Indian Residents traveling abroad and
- D. Transit Passengers

#### A. Foreign Nationals

- 3.2 An estimated 26,19,458 foreign tourists departed from various exit points covered in the survey during the period January to December 2003. The 15 major countries (excluding Bangladesh) accounted for 61.90% of foreign nationals who departed from India during the period January – December 2003. These countries are hereafter referred to as top 15 or major countries (in terms of foreigners departing from India) and results have been presented in different tables for these countries. The share of top five countries namely, UK, USA, Sri Lanka, Canada and France was 42.44% of the total foreign tourists.

**Table 3.1: Distribution of Foreign Tourists by Country of Residence**

Country of Residence	Total	% To the total
United Kingdom	429,128	16.40
United States of America	368,390	14.08
Sri Lanka	127,395	4.87
Canada	100,161	3.83
France	85,250	3.26
Germany	81,840	3.13
Malaysia	70,928	2.71
Japan	65,208	2.49
Nepal	57,035	2.18
Australia	55,440	2.12
Singapore	49,080	1.88
Italy	39,215	1.50
Korea, South	33,500	1.28
Netherlands	32,232	1.23
Israel	26,894	1.03
<b>Total of 15 Countries</b>	<b>16,21,696</b>	<b>61.90</b>
<b>Others</b>	<b>99,77,62</b>	<b>38.09</b>
<b>All Countries</b>	<b>26,19,458</b>	<b>100.00</b>

- 3.3 The analysis of data collected has been done and presented on the following broad heads:

- (i) Demographics
- (ii) Travel pattern
- (iii) Purpose and motivation
- (iv) Tour planning
- (v) Experience evaluation and satisfaction
- (vii) Expenditure pattern

## **DEMOGRAPHICS**

### **Gender**

- 3.4 Gender analysis of the foreign tourists reveals a pre-dominance of males with males having a share of nearly 75% of all tourists visiting India. The gender wise distribution for 15 major countries is given in Table 3.2.

**Table 3.2: Gender Wise Distribution of Foreign Tourists**

<b>Name of Country</b>	<b>Female (%) To total</b>	<b>Male (%) To total</b>
United Kingdom	26.62	73.38
United States of America	29.34	70.66
Sri Lanka	3.51	96.49
Canada	15.41	84.59
France	36.30	63.70
Germany	26.37	73.63
Malaysia	34.97	65.03
Japan	21.05	78.95
Nepal	29.41	70.59
Australia	72.73	27.27
Singapore	39.12	60.88
Italy	28.30	71.70
Korea, South	30.00	70.00
Netherlands	29.11	70.89
Israel	31.09	68.91
<b>All Countries</b>	<b>24.90</b>	<b>75.77</b>

### **Age**

- 3.5 The tourists were classified into five-age groups viz., upto sixteen, seventeen to thirty, thirty one to thirty five, thirty six to sixty five, and over sixty-five. Nearly 49.12% of the tourists belonged to the age-group thirty six to sixty five, while nearly a quarter of tourists belonged to the age-group seventeen to thirty. The age wise classification of foreign nationals for 15 top major countries is given in Table 3.3.

**Table 3.3: Distribution of Foreign Tourists by Age-Group (% to total)**

<b>Name of Country</b>	<b>Below 16 years</b>	<b>17-30 years</b>	<b>31-35 years</b>	<b>36-65 years</b>	<b>Above 65 years</b>
U.K	0.00	40.10	35.31	23.09	1.51
U.S. A	9.14	23.86	10.66	53.05	3.30
Sri Lanka	8.19	12.87	24.56	51.46	2.92
Canada	7.17	25.09	11.11	53.76	2.87
France	8.21	24.46	11.38	52.96	2.99
Germany	8.06	24.19	10.97	53.55	3.23
Malaysia	7.69	25.17	13.99	50.35	2.80
Japan	8.20	25.71	10.12	52.94	3.04
Nepal	8.24	25.88	5.88	56.47	3.53
Australia	8.33	24.24	10.73	53.66	3.03
Singapore	7.33	26.16	10.51	53.06	2.93
Italy	7.91	24.51	11.07	53.52	3.00
Korea, South	8.00	24.00	11.20	53.60	3.20
Netherlands	9.49	25.32	9.49	52.53	3.16
Israel	7.98	24.79	9.24	52.94	5.04
<b>Total all countries</b>	<b>5.12</b>	<b>25.32</b>	<b>18.08</b>	<b>49.12</b>	<b>2.36</b>

**Marital status and level of education**

- 3.6 The tourists were also classified on the basis of their marital status & educational levels. The survey reveals that nearly 63% of the foreign nationals visiting India were married. Education wise, graduates and postgraduates accounted for around 80 % of the foreign nationals who visited India. Table 3.4 gives a cross-classification of foreign tourists educational status & marital status.

**Table 3.4: Distribution of Foreign Tourists by Education & Marital Status**

<b>Educational Status</b>	<b>Married</b>	<b>Unmarried</b>	<b>Total</b>
<b>Under Graduate</b>	234567	277513	512080 (19.57%)
<b>Graduate</b>	902004	460359	1362364 (52.07%)
<b>Post Graduate</b>	511828	230083	741911 (28.36%)
<b>Total</b>	1648400 (63.00%)	967955 (37.00%)	2616355 (100.00%)

**Occupational distribution**

- 3.7 Classification of Tourists was made according to their occupational status. These included six categories viz., Services, Professional, Self-employed, Business, Students and Housewife. While Professionals accounted for 31.79%, followed by 31.17% Business class, 16.02% Services, 8.96% Students, 8.68% Self-employed and 3.38% Housewives. Table 3.5 gives occupation breakup of foreign nationals of 15 major countries.

**Table 3.5: Distribution of Foreign Tourists by Occupation (% to total)**

Name of country	Services	Professional	Self-Employed	Business	Student	House-wife
U.K	9.79	58.25	10.75	15.24	5.30	.66
U.S. A	11.62	39.59	10.25	23.91	11.37	3.25
Sri Lankan	7.02	11.70	.00	77.78	.00	3.51
Canada	11.11	49.82	2.51	32.97	1.43	2.15
France	13.61	31.79	7.45	34.96	4.93	7.27
Germany	12.42	39.68	14.92	17.26	14.03	1.69
Malaysia	14.69	43.36	17.48	15.38	2.10	6.99
Japan	12.15	52.94	2.73	29.05	2.94	0.20
Nepal	70.59	000	000	000	000	29.41
Australia	23.99	36.87	16.16	10.23	5.81	6.94
Singapore	14.18	35.70	12.22	20.29	7.33	10.27
Italy	2.13	1.26	49.80	33.83	12.96	000
Korea, South	.00	35.60	5.60	43.20	13.20	2.40
Netherlands	25.32	15.82	8.23	22.78	7.59	20.25
Israel	10.92	29.41	000	59.66	000	000
<b>Total all Countries</b>	<b>16.02</b>	<b>31.79</b>	<b>8.68</b>	<b>31.17</b>	<b>8.96</b>	<b>3.38</b>

### Income

- 3.8 The tourists were distributed by their annual household income into five categories viz., less than Rs.50, 000/-, Rs., 51,000/- to 100,000/-, Rs., 101,000/- to 200,000/-, Rs 201,000/- to 400,000 to, 401,000 to 800,000, and above 801,000. The survey revealed that around 75% of the foreign tourists belonged to the Annual Average Income of above Rs. 800 thousand. Range-wise distribution of Annual Average Income of foreign tourists is given below in Table 3.6:

**Table 3.6: Distribution of Foreign Tourists by Household Income Range**

Annual Income range (In Rs. 000)	% of Foreign Tourists
Lees than 600	13.61
601-800	11.80
Above 800	74.59

- 3.9 Information was also collected from the foreign tourists if they had friends, relatives and business associates in India. It was found that U.K (16.40%), USA (14.08%) and Bangladesh (19.36%) were having maximum number of friends, relatives & business associates in India. The share of other countries was relatively marginal, less than 1% in all most all the cases except Canada (3.83%), France (3.26%), Germany (3.13%), Japan (2.49%), Malaysia (2.71%) and Sri Lanka (4.87%).

## ***EXPENDITURE PATTERN***

### **Package tour**

- 3.10 Out of the total tourists, only 6.72% of the tourists were package tourists, while the remaining 93.28% were non-package tourists. Table 3.7 shows total number of tourists, total package tourists & percentage of package tourists in respect of 15 major countries, which shows a slightly higher percentage of package tourists at 7.47% as compared to the overall average of 6.72%.

**Table 3.7: Package Foreign Tourists for Major Countries**

<b>Name of Country</b>	<b>Total No. Tourists</b>	<b>Total Package Tourists</b>	<b>% of Package Tourists</b>
U.K	429128	52772	12.30
U.S. A	368390	22814	6.19
Sri Lankan	127395	4470	3.51
Canada	10061	3231	3.23
France	85250	3850	4.52
Germany	81840	7260	8.87
Malaysia	70928	2480	3.50
Japan	65208	5028	7.79
Nepal	57035	2684	4.71
Australia	55440	1470	2.65
Singapore	49080	480	.98
Italy	39215	2480	6.32
Korea, South	33500	1876	5.60
Netherlands	32232	2652	8.23
Israel	26894	904	3.36
<b>Total of 15 countries</b>	<b>1,531,596</b>	<b>114,457</b>	<b>7.47</b>
<b>All countries</b>	<b>2,616,355</b>	<b>175,692</b>	<b>6.72</b>

### **Average duration and cost of package tours**

- 3.11 Average cost of package tour for trip in India for package tourists was estimated at Rs 48,613 and the average duration of package tour for Indian trip was 15 nights. Table 3.8 shows average cost of trip in India and duration of stay in India in respect of 15 major countries.

**Table 3.8: Average Cost and Duration of Package Tours**

Name of Country	Average Cost in India in Rs.	Duration of Stay in India (In nights)
U.K	49165	15
U.S. A	88568	16
Sri Lankan	30849	13
Canada	79533	13
France	34033	14
Germany	45072	18
Malaysia	28453	14
Japan	43259	15
Nepal	20409	13
Australia	32373	14
Singapore	34146	7
Italy	72278	14
Korea, South	22182	9
Netherlands	47989	14
Israel	65085	14
<b>All countries</b>	<b>48,613</b>	<b>15</b>

**Expenditure incurred over and above the package cost**

- 3.12 Information on the expenditure over and above the package tour, incurred by the foreign tourists pre-trip and the expenditure incurred in India was also collected. Table 3.9 below shows the average expenditure incurred by package foreign tourists, which was not covered in the package cost in respect of 15 major countries.

**Table 3.9: Expenditure Incurred Over and Above Package Tour Cost**

Name of Country	Expenditure Per Tourist in Rs	
	Pre Trip	In India
U.K	32289	18362
U.S. A	53036	13374
Sri Lankan	54359	80875
Canada	50749	57565
France	50919	13695
Germany	59457	20221
Malaysia	2206	13723
Japan	66118	16572
Nepal	100042	125453
Australia	26306	11721
Singapore	36174	26614
Italy	4039	46460
Korea, South	31999	4511
Netherlands	51113	10094
Israel	45803	65085
<b>All countries</b>	<b>41,577</b>	<b>20,910</b>

**Break up expenditure of package tourists**

- 3.13 Items wise break up of expenditure in respect of package tourists is not available. The package cost included travel to and from India, local transport in India, sight seeing in India, accommodation and food. The tourist was not aware of the rationale and the quantum of item wise break up of expenditure. The tour operators also did not disclose the break up of expenses, as the same varied from place of visit, the scope of the package and the country of origin of the tourist.

**Expenditure pattern of non –package tourists**

- 3.14 Tables 3.10 and 3.11 show number of non-package tourists, the average pre trip expenditure, as well as average expenditure in India per foreign tourist in respect of 15 major countries. The average expenditure per tourist in India was Rs 45,504 and pre- trip expenditure was Rs 32,698.

**Table 3.10: Average Expenditure of Foreign Tourists Non-Package  
(15 Major Countries)**

Name of Country	Total No of Passengers	Expenditure Per Tourist	
		Pre Trip	In India
U.K	376356	18939	45104
U.S. A	345576	54857	66254
Sri Lankan	122925	62068	81608
Canada	96930	66865	93760
France	81400	42610	34964
Germany	74580	43013	50546
Malaysia	68448	31911	32177
Japan	60126	19936	62487
Nepal	54351	100042	102787
Australia	53970	28742	64701
Singapore	48600	51313	44676
Italy	36735	9908	38505
Korea, South	31624	52704	50339
Netherlands	29580	37252	11874
Israel	25990	72606	85119
<b>All Countries</b>	<b>24,40663</b>	<b>32,698</b>	<b>45,504</b>

- 3.15 The survey revealed for the non-package foreign tourist, on an average 18.20% expenditure was towards accommodation, 15.25% towards Food & Beverages, 16.46% towards Internal Transport, 9.58% towards Travel Services, 6.60% towards Cultural & Recreational Services, the major expenditure of 33.90% accounted for other Connected Goods and Services, which includes shopping expenses of the tourists. Table 3.11 indicates broad item wise percentage expenditure by non-package tourists in respect of 15 major countries.

**Table 3.11: Breakup of Expenditure of Non-Package Tourists (In %)**

Name of Country	Total Spend Amount (in 000' Rs.)	Acc.	Food & B	Internal Transport	Travel Services	C & R Services	OCG& Services
U.K	15762926	19.12	16.69	16.97	10.31	9.29	27.62
U.S. A	21812123	21.44	17.01	16.42	8.76	2.99	33.39
Sri Lankan	9976753	15.67	11.77	8.68	20.01	14.93	28.94
Canada	8636558	15.14	19.67	26.86	9.68	5.55	23.11
France	2657982	16.47	11.98	14.76	6.17	3.95	46.68
Germany	3552818	20.54	19.37	13.52	9.89	4.65	31.68
Malaysia	2054028	23.91	18.41	13.54	2.79	4.08	37.27
Japan	3632137	18.26	9.71	23.44	8.22	3.73	36.63
Nepal	5355936	5.93	9.63	4.26	4.33	5.71	70.13
Australia	3297355	22.52	13.63	16.82	8.24	6.30	32.78
Singapore	2110710	20.93	15.79	20.30	4.94	3.13	34.92
Italy	1300404	17.14	15.65	18.68	11.50	6.29	30.75
Korea, South	1500671	15.93	22.44	22.17	8.64	7.27	23.56
Netherlands	341302	6.15	13.27	2.43	5.35	4.15	68.66
Israel	2175063	18.84	12.25	13.44	17.61	14.21	23.65
<b>All Countries</b>	<b>104873887</b>	<b>18.20</b>	<b>15.25</b>	<b>16.46</b>	<b>9.58</b>	<b>6.60</b>	<b>33.90</b>

*Note: Acc: Accommodation; F&B: Food and Beverages; C&R: Cultural and Recreation; OC& G: Other Connected Goods and Services.*

### **Average expenditure and duration of stay (nights spent) of package and non-package tourists**

- 3.16 Table 3.12 indicates average expenditure increased by package & non-package per foreign tourist in respect of 15 major countries. Thus on an average the pre-trip expenditure was Rs 33,294 and the expenditure in India was Rs 43,852.
- 3.17 The average duration of stay for a package tourist was estimated as 15 nights, while the average duration of stay for all tourists is 16 nights. The average duration of stay was 20 or more nights in respect of tourists from Canada (20 nights), Belgium (25 nights), Czech Republic (25 nights), Kazakhstan (24 nights), Poland (20 nights), Sri Lanka (23 nights) and Bahrain (21 nights). Table 3.13 gives the duration of stay (in nights spent) for tourists for 15 major countries.

**Table 3.12: Average Expenditure of Foreign Tourists:  
Package and Non-Package (15 Countries)**

Name of Country	Total No of Passengers	Expenditure Per Tourist (in Rs)	
		Pre Trip	In India
U.K	429128	20581	41815
U.S. A	368390	54744	62979
Sri Lankan	127395	61798	81583
Canada	100161	66345	92593
France	85250	42985	34004
Germany	81840	44472	47918
Malaysia	70928	30872	31531
Japan	65208	23535	58909
Nepal	57035	100042	103854
Australia	55440	28677	63297
Singapore	49080	51165	44500
Italy	39215	9537	39008
Korea, South	33500	51545	47773
Netherlands	32232	38393	11728
Israel	26894	71705	84446
<b>All Countries</b>	<b>26,16,355</b>	<b>33,294</b>	<b>43,852</b>

**Table 3.13: Average Duration of Stay in India for All Tourists**

Name of Country	Duration (No. of nights)
U.K	15
U.S. A	15
Sri Lanka	23
Canada	20
France	15
Germany	14
Malaysia	8
Japan	12
Nepal	31
Australia	17
Singapore	9
Italy	11
Korea, South	16
Netherlands	14
Israel	18
<b>All countries</b>	<b>16</b>

### **Shopping expenditure**

3.18 Of the total average expenditure of Rs. 77,146 per tourist, (package and non-package) on an average a tourist spent Rs 13,123 on shopping, which is 17% of the total average expenditure of a foreign tourist.

3.19 An analysis of the break-up of the shopping expenditure of the foreign tourists shows that of the total shopping expenditure, nearly 25.36% was towards purchase of Textiles, 22.50% towards Personal Goods, 15.11% towards Handicrafts, 13.86% towards Jewellery, 13.56% towards Gems & Precious Stones and the rest on Carpets (4.39%), Books & Reading Material (2.16%) and Others (3.08%). Table 3.14 indicates combined shopping expenditure of package and non-package tourists from 15 major countries.

**Tables 3.14: Break up of Shopping Expenditure  
(Both Package & Non Package Tourists in %)**

Name of Country	Amount (In Rs. 000s)	Carp-Ets	Jewe-llery	G / P Stone	Textile	HC	B / RM	PG	Oth-ers
U.K	5068201	3.26	16.33	12.92	15.63	18.25	2.27	27.57	27.57
U.S. A	7159741	9.55	17.22	9.91	14.74	24.38	1.06	22.57	22.57
Sri Lankan	3007760	0.00	1.04	1.44	79.03	2.28	0.00	16.21	16.21
Canada	1917997	0.00	17.28	24.12	12.34	19.58	2.89	22.30	22.30
France	1039517	5.53	6.18	9.14	19.57	16.44	24.40	18.70	18.70
Germany	1220501	0.00	20.23	18.23	11.14	10.91	1.15	26.88	26.88
Malaysia	771860	0.00	3.42	33.15	20.31	10.58	0.00	12.55	12.55
Japan	1386222	3.58	36.85	5.19	22.51	4.29	0.44	24.19	24.19
Nepal	2778184	0.00	17.29	27.99	9.53	7.32	0.00	30.01	7.95
Australia	1064293	32.85	10.01	13.03	17.89	11.80	0.82	11.57	11.57
Singapore	722528	0.00	8.61	26.84	16.49	20.95	1.18	21.36	21.36
Italy	407118	6.21	11.97	37.22	5.81	4.85	2.59	25.31	25.31
Korea, South	361973	0.00	3.41	15.91	20.45	14.27	2.13	43.08	43.08
Netherlands	213421	3.96	13.02	0.00	25.23	20.93	3.82	33.04	33.04
Israel	518069	0.00	0.69	1.48	76.90	3.40	0.00	17.52	17.52
<b>All Countries</b>	<b>34225975</b>	<b>4.39</b>	<b>13.86</b>	<b>13.56</b>	<b>25.36</b>	<b>15.11</b>	<b>2.16</b>	<b>22.50</b>	<b>3.08</b>

Note:- G/P :Gems and precious Metals; HC: Handicraft; B/ RM : Books and Reading Material; P.G: Personal Goods

### **Shopping for business purposes**

3.20 No respondent recorded shopping for business purposes due to probably customs formalities in India as well as country of his / her origin.

### **Expenditure Incurred by relatives, friends and associates**

3.21 The expenditure incurred by friends, relatives, and associates on package, non-package tourists were also captured in the Survey. Table 3.15 indicates the expenses

on package and non-package tourists combined in respect of 15 major countries, which were incurred, by friends, relatives and associates.

**Table 3.15 Breakup of Expenses Incurred by Friends, Relatives, And Business Associates Package & Non Package Tourists (In %)**

Name of Country	Total Amount (In Rs. Thousands)	Acc.	Food & B	Internal Transport	Travel Services	C & R Services	OC G& Services
U.K	10800	27.78	16.67	55.56	0.00	0.00	0.00
U.S. A	427778	41.92	27.28	14.61	4.13	12.05	0.00
Sri Lankan	165192	9.21	4.60	45.55	28.42	12.21	0.00
Canada	29242	9.21	4.61	49.27	30.45	6.02	0.00
France	43723	43.00	28.11	3.38	21.04	4.47	0.00
Germany	13662	13.04	30.43	4.35	17.39	34.78	0.00
Malaysia	0	0.00	0.00	0.00	0.00	0.00	0.00
Japan	26379	53.59	28.52	15.34	0.00	2.55	0.00
Nepal	0	0.00	0.00	0.00	0.00	0.00	0.00
Australia	16417	0.00	57.13	5.67	25.49	0.00	11.71
Singapore	0	0.00	0.00	0.00	0.00	0.00	0.00
Italy	27376	58.68	13.03	17.42	10.87	0.00	0.00
Korea, South	67000	24.00	19.60	7.00	19.20	30.20	0.00
Netherlands	0	0.00	0.00	0.00	0.00	0.00	0.00
Israel	128870	9.22	4.60	45.74	29.19	11.26	0.00
<b>All Countries</b>	<b>3427705</b>	<b>55.70</b>	<b>16.67</b>	<b>9.52</b>	<b>6.67</b>	<b>7.07</b>	<b>4.37</b>

*Note: Acc: Accommodation; F&B: Food and Beverages; C&R : Cultural and Recreation; OC& G: Other Connected Goods and Services.*

## **TRAVEL PATTERN**

### **Size of travel group**

- 3.22 An analysis of the size of group of the tourists from different countries and regions, shows that 40.84% of tourists travelled alone, 22.96% in group of two persons, 28.38% in a group of 3 to 5 persons, 4.39% in a group of six to ten persons, while 2.11% in a group of eleven to fifteen persons, while 1.31% travelled in a group of above fifteen persons.

### **Composition of travel group**

- 3.22 The survey revealed that almost 40.84% of the tourists were traveling alone, while the remaining traveled in various combinations with spouse, children, parents, friends etc. as given in the Table 3.16.

**Table 3.16: Distribution of Foreign Tourists by  
Composition of Travel Group**

Sl. No.	Composition of Travel Group	% of Foreign Tourists
1	Alone	40.84
2	With spouse only	7.91
3	With children only	0.71
4	With parents only	4.97
5	With friends only	9.17
6	With spouse and children	0.82
7	With spouse and friends	2.18
8	With spouse and parents	2.82
9	With spouse, children and friends	16.28
10	With spouse, children and parents	4.27
11	With spouse, friends and parents	5.36
12	With spouse, children, friends and parents	3.49
13	Others	1.18

### **Mode of travel**

- 3.23 The following Table 3.17 shows major mode of travel within India by foreign tourists. Travel by air was major mode of travel for 32.47% of tourists, 33.76% availed rail as major mode and for the remaining 33.77% road transport was the major mode of travel within India.

**Table 3.17: Major Mode of Travel Within India (In %)**

Mode of Travel in India	% of Foreign Tourists
Air	32.47
Rail First Class and Above	4.98
Rail Other Classes	28.78
Road Special	24.29
Road Ordinary	9.48

### **Type of fare**

- 3.24 The following Table 3.18 gives details of the type of fare paid by foreign tourists, which indicates that almost 85% of them availed normal fare for travel.

**Table 3.18: Type of Fare Paid by Foreign Tourists(In %)**

Type of Fare	% of Foreign Tourists
Normal	84.97
Excursion	6.12
Other concessional	8.19

## ***MOTIVATIONAL DETAILS***

### **Purpose of visit**

- 3.25 Table 3.19 gives the main purpose of visit of foreign tourists, which shows 45.45% tourists visited for leisure, recreation and holiday, 23.00% for business purposes and 12.24% for religion and pilgrimage, 12.01% visited to meet friends and relatives in India, 2.20% for health & medical treatment while the remaining 4.40% visited India for other purposes.

**Table 3.19: Main Purpose of Visit (in %)**

<b>Purpose of Visit</b>	<b>% of Tourists</b>
Leisure, Recreation and Holiday	45.45
Visiting Friends and Relatives	12.01
Business and Professiona	23.00
Health and Treatment	2.20
Religion and Pilgrimage	12.24
Others	4.60

### **Places visited**

- 3.26 Table 3.20 shows places visited by foreign tourists in the descending order of number of tourists. 10 Most popular places in descending order are Delhi, Mumbai, Chennai, Kolkata, Bangalore, Mysore, Agra, Hyderabad, Khajuraho and Gaya.

**Table 3.20: Popular Places Visited by Foreign Tourists**

<b>Sr. No.</b>	<b>Place Visited</b>	<b>No. of Tourists</b>
1.	Delhi	625055
2.	Mumbai	603560
3.	Chennai	577974
4.	Kolkata	524239
5.	Bangalore	492141
6.	Mysore	461069
7.	Agra	418981
8.	Hyderabad	375527
9.	Khajuraho	348518
10.	Gaya	331491

### **Type of Accommodation used**

- 3.27 Table 3.21 shows the type of accommodation used by foreign nationals. About 47% of tourists availed budget hotels, while around 20% preferred star hotels, about 11% made use of the hospitality of friends & relatives. Guesthouses (9.72%) and Private rented accommodation (8.89%) were also popular with foreign nationals.

**Table No. 3.21: Type of Accommodation Used by Foreign Tourists (in %)**

Sr. No.	Type of Accommodation	% of tourists
1.	Starred Hotels	20.10
2.	Other hotels	47.46
3.	Guest Houses	9.72
4.	Youth Hostels	1.12
5.	Tourist Camps	1.27
6.	Conferences Centers	0.14
7.	Private Rented	8.89
8.	Friends & Relatives	11.22
9.	Others	0.08

**Factors considered Very Important in choosing an overseas destination and experience of foreign tourists in India on these factors**

- 3.28 Almost 1/3 of the tourists considered the factors such as, Tourist attraction, Climate, Expensiveness, Safety and security, Public hygiene and cleanliness, Culture & History, Friendliness of people. Ease of communication with local people, Shopping facilities, Road, Facilities at airport, International travel facilities and Good hotels as 'Very Important' factors while choosing one overseas destination over another. Local travel facilities by rail and road were considered 'Very Important' by 27% and 28% of the tourists respectively. Local travel by air was considered as 'Very Important' by almost 32% of the tourists. About their experiences in India on these factors, about 13% recorded their experience in India as 'Very Good', while 48.16% recorded as 'Good' and 17.72 % as 'Average', while 23.44% were not happy and recorded as 'Poor'.

**Factors influencing choice of particular destination**

- 3.29 Table 3.22 indicates motivational factors like Sightseeing, Cultural Activities, Resorts, Participatory sports, Shopping etc. that influence the foreign tourists in choosing a particular destination and how important a particular factor was in terms of it being a Primary factor, Secondary factor, or Not Important factor in influencing the choice of a particular destination.

**Repeat visits**

- 3.30 Table 3.23 shows the percentage distribution of foreign tourists by their percentage of previous visits to the country. While more than 50% of the tourists visited India for the first time, almost 10% of them had visited India more than five times on earlier occasions.

**Table 3.22: Primary and Secondary Factors in Influencing Choice of Destination of Foreign Tourists (In %)**

Factors	Primary	Secondary	Not important
<b>Sightseeing</b>			
Landscapes / Scenic Beauty	74.32	19.91	5.77
Monuments/ Archaeological Sites	49.99	40.10	9.91
Museums / Art Galleries	47.28	27.62	25.10
Wild Life / Sanctuaries	20.92	37.06	42.03
Rural life	18.75	58.19	23.06
Cities and Markets	44.06	39.06	16.88
<b>Cultural Activities</b>			
Art/ Theater/ Music/ Dance	37.74	42.47	19.79
Festivals/ Fairs	31.63	41.34	27.03
Literary	14.44	43.16	42.40
<b>Resorts</b>			
Beaches	39.07	40.00	20.93
Hills	21.88	40.31	37.81
<b>Participatory Sports</b>			
Water Sports	10.91	21.71	67.38
Winter Sports	5.74	17.67	76.59
Trekking	11.79	26.21	62.00
Mountaineering	6.19	15.77	78.04
Rafting	6.57	15.68	77.75
Fishing	8.38	19.42	72.20
Golf	3.24	14.32	82.45
<b>Shopping</b>	10.77	64.48	24.76

**Table 3.23: Previous Visits to India (In %)**

No. of Previous Visits	% of Tourists
Not Visited earlier	50.20
Visited Once	14.32
Visited Twice	11.37
Visited Thrice	4.06
Visited Four Times	8.25
Visited Five Times	1.83
More Than Five Times	9.98

**Source of information**

- 3.31 Table 3.24 provides a percentage distribution of the foreign tourists with respect to their main source of information, which helped them to know about and visit, India as a destination. It is seen that previous visits account for nearly 41%, while 36% of the tourists got information from friends and relatives about India.

**Table 3.24: Source of Information (In %)**

<b>Main Source of Information</b>	<b>% of Foreign Tourists</b>
Previous Visits	40.74
Friends Relatives	35.54
Govt. Tourist offices	1.31
Indian Diplomatic Mission	3.31
Travel Agents / Tour Operators	7.78
Travel Magazines Films, TV etc	5.31
Airlines	1.70
Hotels	0.03
Others (Internet)	4.47

## ***TOUR PLANNING***

### **Advance Planning**

- 3.32 The schedule contained specific query regarding tour planning by the visitors to India. These queries included (i) time period of advance decision to visit India, (ii) duration of advance booking of the ticket and (iii) how travel arrangements were made. Table 3.25 provides a summary (i) and (ii) and Table 3.26 gives a summary of how travel arrangements were made by the visitors. The average duration taken by the foreign tourist for taking the decision to visit India was a little above 7 weeks with a majority (52%) of them took the decision more than four weeks in advance. The average duration of advance booking of the tickets was 4.4 weeks, with more than 51% of the tourists booking their tickets more than 3 weeks in advance. While almost 46% of the visitors used the services of travel agents, 10% utilized the services of tour operators for making their travel arrangements, about 37% arranged the same themselves, while for the remaining 7% travel arrangements were made either by office/employer or by others.

**Table 3.25: Advance Decision to Visit India and Duration of Advance Booking**

<b>Time Period in Weeks</b>	<b>Advance Decision to Visit India (% of Tourists)</b>	<b>Duration of Advance Booking (% of Tourists)</b>
One week	3.42	15.91
Two weeks	11.47	21.93
Three weeks	12.45	10.81
Four weeks	19.95	26.17
Five to eight weeks	19.19	15.38
Nine to twelve weeks	21.20	5.18
Thirteen to twenty weeks	4.52	1.72
More than twenty weeks	7.80	2.9

**Table 3.26: Travel Arrangements**

<b>Travel Arrangement Made Through</b>	<b>% of Tourists</b>
Self	36.82
Office / Employer	5.67
Travel Agent	45.98
Tour Operator	9.84
Others	1.69

**EVALUATION****Rating of India visit**

- 3.33 The tourists were asked to evaluate their over all visit to India by rating it as per the satisfaction level as Most satisfying, Satisfying, Average and Disappointing. A summary of the satisfaction levels for 15 major countries is given in Table 3.27. It may be seen that 35.73% of the tourists evaluated their overall visit to India as Most Satisfying, 48.94% rated it as Satisfying, 12.05% as Average and only 3.28% rated it as Disappointing.
- 3.34 While only 3.28% of the tourists recorded their visit as disappointing, the field staff observed that the respondents were not happy with the services of travel agents, tour operators / guides, taxi drivers. i.e. with the basic service providers in general.

**Table 3.27: Overall Satisfaction Levels of Visit to India (in %)**

<b>Name of Country</b>	<b>Most Satisfying</b>	<b>Satisfying</b>	<b>Average</b>	<b>Disappointing</b>
U.K	55.96	39.03	1.55	3.46
U.S. A	24.67	50.66	9.49	15.18
Sri Lankan	7.02	15.20	77.78	0.00
Canada	61.29	34.41	0.00	4.30
France	37.07	60.35	2.58	0.00
Germany	42.34	42.26	12.02	3.39
Malaysia	3.50	81.012	15.38	0.00
Japan	19.53	65.38	7.69	7.39
Nepal	1.18	52.94	45.88	0.00
Australia	20.20	69.57	10.23	0.00
Singapore	3.08	76.53	20.29	0.00
Italy	10.20	55.89	33.91	0.00
Korea, South	41.20	49.20	9.60	0.00
Netherlands	74.68	25.32	0.00	0.00
Israel	18.91	21.43	59.68	0.00
<b>All Countries</b>	<b>35.73</b>	<b>48.94</b>	<b>12.05</b>	<b>3.28</b>

**Potential for repeat visit**

- 3.35 An attempt was made to ascertain from the tourists whether they would like to visit India again and whether they would advise their friends to visit India. 76.64 % opined that they would like to visit India again, while 80.95% remarked that they would advise their friends to visit India. Table 3.28 gives details for 15 major countries in respect of these two aspects.

**Table 3.28: Distribution by Intention to Visit India Again  
and Advise to Friends to Visit India (in %)**

<b>Name of Country</b>	<b>% of Tourists who would like to visit again</b>	<b>% of Tourists who would advise friends to visit India</b>
U.K	57.66	58.43
U.S. A	50.05	56.2
Sri Lanka	70.76	94.15
Canada	95.70	95.70
France	96.72	98.59
Germany	92.26	2.26
Malaysia	93.71	86.71
Japan	96.26	85.73
Nepal	96.47	100.00
Australia	92.68	90.15
Singapore	81.17	81.17
Italy	65.61	88.70
Korea, South	90.40	90.40
Netherlands	74.68	90.51
Israel	100.00	100.00
<b>All Countries</b>	<b>76.64</b>	<b>80.95</b>

## B. Non Resident Indians (NRI)

- 3.36 During the period of the survey, viz, January to December 2003, 16,64,817 NRIs departed from India through various exit points. For the purpose of detailed analysis, 15 countries, which accounted for 74.56% of the total NRIs have been considered. Table 3.29 shows the distribution of number of NRI tourists by country of residence in respect of 15 major countries, from the point of view of number of NRI tourists.

**Table 3.29: Distribution of Number of NRI Tourists (15 major countries)**

Country Name	No. of Tourists	% of Total
Canada	154308	9.27
USA	161007	9.67
UK	186417	11.20
China	37422	2.25
Japan	57057	3.43
Korea South	49434	2.97
Malaysia	82929	4.98
Sri Lanka	151998	9.13
UAE	120120	7.22
Sudan	83391	5.01
Australia	43659	2.62
New Zealand	68145	4.09
France	21252	1.28
Israel	20559	1.23
Denmark	3627	2.18
<b>Total of 15 Countries</b>	<b>12,41,325</b>	<b>74.56</b>
<b>All Countries</b>	<b>16,64,817</b>	<b>100.00</b>

## DEMOGRAPHICS

### Gender

- 3.37 The gender distribution of the NRIs visiting India was biased towards males with male NRIs accounting for 76.77% of the total and females represented the remaining 23.23%. The ratio was more or less similar to almost all the countries except Mauritius (50%) Indonesia (62%) and Philippines (67%). Table 3.30 gives the gender distribution of NRIs.

### Age group

- 3.38 Age wise distribution of NRIs is shown in Table 3.31, 46% of NRIs belonged to the age group of 36 to 65; those above 65 age group is only marginal (below 3 %) of the total.

**Table 3.30: Gender Distribution of NRI Tourists (15 major countries)**

<b>Country Name</b>	<b>Male (%)</b>	<b>Female(%)</b>
Canada	75.60	24.40
USA	67.58	32.42
UK	80.42	19.58
China	98.77	1.23
Japan	66.80	33.20
Korea South	81.31	18.69
Malaysia	74.93	25.07
Sri Lanka	69.15	30.85
UAE	82.50	17.50
Sudan	80.06	19.94
Australia	76.19	23.81
New Zealand	69.83	30.17
France	89.13	10.87
Israel	77.53	22.47
Denmark	78.98	21.02
<b>All Countries</b>	<b>76.77</b>	<b>23.23</b>

**Table 3.31: Age wise Distribution of NRIs as % to total (15 major countries)**

<b>Name of Country</b>	<b>Below 16 years</b>	<b>17-30 years</b>	<b>31-35 years</b>	<b>36-65 years</b>	<b>Above 65 years</b>
Canada	4.94	27.69	11.98	51.35	4.04
USA	5.02	27.98	11.48	52.51	3.01
UK	5.20	28.00	12.02	51.67	3.10
China	5.56	27.78	12.35	51.23	3.09
Japan	4.45	26.72	12.15	53.85	2.83
Korea South	5.14	28.04	14.95	49.07	2.80
Malaysia	5.01	27.30	16.16	48.75	2.79
Sri Lanka	0.00	34.35	44.07	21.58	0.00
UAE	5.19	30.58	12.50	48.85	2.88
Sudan	5.54	28.25	13.02	50.42	2.77
Australia	4.76	27.51	18.52	46.03	3.17
New Zealand	6.10	24.75	16.95	48.81	3.39
France	2.17	26.09	57.61	10.87	3.26
Israel	4.49	41.57	13.48	37.08	3.37
Denmark	5.10	31.21	12.74	47.77	3.18
<b>All Countries</b>	<b>4.19</b>	<b>29.71</b>	<b>17.48</b>	<b>45.71</b>	<b>2.19</b>

### **Educational level and marital status**

- 3.39 The survey revealed that 74.40% NRIs who visited India during the period of survey were married. The educational status of NRIs reveals that 44.32% were Undergraduates, 38.76% were Graduates and 16.93% were Postgraduates. Table 3.32 gives a cross-classification of the NRIs Educational status and the Marital status.

**Table 3.32: Educational and Marital Status (in %)**

<b>Educational Status</b>	<b>Married</b>	<b>Unmarried</b>	<b>Total</b>
Under Graduate	523194	214589	737783 (44.32%)
Graduate	496687	148529	645216 (38.76%)
Post Graduate Post Graduate Post Graduate	218741	63077	281818 (16.93%)
<b>Total</b>	<b>1238622 (74.40%)</b>	<b>426195 (25.60%)</b>	<b>1664817 (100.00%)</b>

### **Occupation**

- 3.40 Table 3.33 gives the Occupation wise classification of NRIs for major 15 countries. Nearly 52.31% of the NRIs who visited India were service class, 19.93% were business men, 16.72% were professionals, while the remaining were self-employed, students and housewives.

**Table 3.33: Occupation wise Distribution of NRIs as % to Total (15 major countries)**

<b>Name of Country</b>	<b>Service</b>	<b>Professional</b>	<b>Selfem- ployed</b>	<b>Busi- ness</b>	<b>Stud- ent</b>	<b>House- wife</b>
Canada	69.46	13.32	1.95	13.02	0.15	2.10
USA	35.87	32.42	1.58	16.93	10.76	2.44
UK	46.22	11.52	6.69	25.40	1.12	9.05
China	48.77	9.88	0.00	31.48	8.64	1.23
Japan	53.04	13.36	18.22	11.34	1.21	2.83
Korea South	64.02	14.49	2.34	14.49	0.47	4.21
Malaysia	65.18	16.99	3.06	10.58	0.56	3.62
Sri Lanka	53.95	12.31	2.28	12.61	1.37	17.48
UAE	63.85	14.23	2.88	13.08	2.50	3.46
Sudan	42.38	9.42	4.99	36.01	0.28	6.93
Australia	14.81	43.39	0.53	17.99	21.16	2.12
New Zealand	48.14	39.32	2.37	7.80	0.00	2.37
France	1.09	28.26	25.00	45.65	0.00	0.00
Israel	65.17	8.99	3.37	15.73	0.00	6.74
Denmark	68.79	9.55	3.18	14.01	0.00	4.46
<b>All Countries</b>	<b>52.31</b>	<b>16.72</b>	<b>3.68</b>	<b>19.93</b>	<b>2.39</b>	<b>4.98</b>

## ***EXPENDITURE PATTERN***

### **Package tour**

- 3.41 NRIs sampled in the survey did not avail package tour facility. As such no information was available regarding type of tour, type of package, cost of package

tour and average cost of package tour. In other words, NRIs sampled were all non-package tourists and their expenditure pattern has been analysed accordingly.

### **Expenditure: Pre Trip / In India**

- 3.42 Table 3.34 shows pre trip expenditure and expenditure incurred in India of NRI tourists for 15 major countries. The NRI tourists from UK were the highest spenders in India with an average expenditure of Rs 50,798 per tourist, followed by NRIs from Australia (Rs 47,600), France (Rs 44,574), Malaysia (Rs 43,338) and USA (Rs 42,549).

**Table 3.34: Average Expenditure per NRI Tourists**

Country Name	Total No. of Passengers	Average Expenditure Per Tourist (In Rs.)		
		Pre Trip	In India	Total
Canada	154308	8278	36373	44651
USA	161007	11722	42549	54271
UK	186417	7713	50798	58511
China	37422	8052	37534	45586
Japan	507057	10084	35371	45455
Korea South	49434	8651	35734	44385
Malaysia	82929	6930	43338	50268
Sri Lanka	151998	7905	39167	47072
UAE	120120	8414	39381	47795
Sudan	83391	10865	42212	53077
Australia	43659	9439	47600	57039
New Zealand	68145	8319	34348	42667
France	21252	6706	44574	51280
Israel	2055	7743	41981	49724
Denmark	36267	8366	39058	47424
<b>All Countries</b>	<b>16,64,817</b>	<b>9,768</b>	<b>38,519</b>	<b>48287</b>

### **Expenditure breakup**

- 3.43 Table 3.35 provides the breakup of the average expenditure of a NRI tourist in India into major items of consumption namely Accommodation (Acc.), Food & Beverages (Food & B), Internal transport, Travel services, Cultural and recreational services (C&R services) and Other connected goods & services (OCG& services) in respect of 15 major countries. From the Table 3.35 it is evident that a major proportion almost 65% of the expenditure by NRIs was on Other connected goods & services. This pattern is evident in respect of NRIs from almost all the countries.

**Table 3.35: Breakup of Expenditure of NRI Tourists for Major Items of Expenditure as a Percentage of Total**

<b>Name of Country</b>	<b>Acc.</b>	<b>Food &amp; B</b>	<b>Internal Transport</b>	<b>Travel Services</b>	<b>C &amp; R Services</b>	<b>OCG&amp; Services</b>
Canada	11.15	6.51	10.23	5.75	8.01	58.35
USA	4.50	6.22	11.36	7.42	7.77	62.73
UK	6.44	7.17	12.25	4.47	5.46	64.20
China	8.12	8.51	22.51	4.42	14.81	41.63
Japan	2.85	7.22	9.22	6.24	8.48	65.98
Korea South	6.16	8.93	8.11	5.40	9.70	61.71
Malaysia	5.99	6.72	6.40	5.10	11.55	64.24
Sri Lanka	5.68	7.48	6.93	4.71	11.69	63.51
UAE	6.40	8.32	10.37	5.14	13.08	56.69
Sudan	3.64	3.68	2.29	6.03	6.35	78.01
Australia	2.81	4.04	10.20	11.35	7.31	64.30
New Zealand	9.69	10.00	8.21	10.89	16.53	44.68
France	5.45	6.64	13.89	13.14	7.40	53.48
Israel	6.35	6.88	4.01	6.45	15.35	60.97
Denmark	5.46	6.70	4.04	4.24	10.09	69.48
<b>All Countries</b>	<b>5.54</b>	<b>5.96</b>	<b>11.14</b>	<b>4.40</b>	<b>7.53</b>	<b>65.43</b>

### **Shopping Expenditure**

- 3.44 Average shopping expenditure per NRI tourist was Rs 21,988, which is 45.54% of the total average expenditure of Rs 48,287 per NRI tourist. The highest ratio was recorded in case of Mauritius at 68%. The NRIs, who spent more than 50% of their expenditure on shopping included NRIs from Afghanistan, Bangladesh, Denmark, UK, Maldives, and Sri Lanka.
- 3.45 The average duration of stay for an NRI tourist was 33 nights. The average duration of stay in nights spent for 15 major countries is given in Table 3.36.

### **Breakup of shopping expenditure**

- 3.46 A distribution of the shopping expenditure of NRI tourist shows that about 20.27% was spent on purchase of personal goods, 18.67% on Textiles, 16.95% on Jewellery, 10.63% on Gems/Precious stones as shown below in Table 3.37.

### **Expenditure incurred by friends and business associates on NRIs**

- 3.47 Table 3.38 indicates average expenditure incurred by friends and business associates on NRIs on various items of expenditure.

**Table 3.36: Average Duration of Stay for NRIs**

<b>Country Name</b>	<b>Avg. Duration (Nights)</b>
Canada	36
USA	30
UK	33
China	38
Japan	28
Korea South	41
Malaysia	41
Sri Lanka	40
UAE	39
Sudan	46
Australia	27
New Zealand	31
France	25
Israel	42
Denmark	41
<b>All Countries</b>	<b>33</b>

**Table 3.37: Breakup of shopping expenditure (In % )**

<b>Items of Shopping Expenditure</b>	<b>Percentage of Shopping Expenditure</b>
Carpets	3.59
Jewellery	16.95
Gem / Precious Stone	10.63
Textiles	18.67
Handicraft	5.43
Book/ Reading Material	4.28
Personal Goods	20.27
Others	20.18

**Table 3.38: Breakup of Expenditure by Friends and Business Associates on NRIs**

<b>Item of Expenditure</b>	<b>Amount Spent (in Rs 000)</b>	<b>Percentage to total</b>
Accommodation	11109763	18.94
Food & Beverage	10313652	17.58
Internal Transport	2170222	3.70
Travel Related Services	11156663	19.02
Cultural & Recreational services	14594008	24.88
Other Connected Goods & services	9313172	15.88
<b>Total</b>	<b>58657480</b>	<b>100.00</b>

## **TRAVEL PATTERN**

### **Size of travel group**

- 3.48 Majority of the NRI tourists traveled alone. Thus about 70% of NRIs tourists travelled alone, 17 % traveled in a group of two and 13% in-groups of 3 to 5.

### **Composition of travel group**

- 3.49 A breakup of the composition of travel group shows that while 70% NRIs traveled alone, 17% traveled with spouse and 6.4% traveled with spouse, children and parents, while remaining traveled in various combinations as indicated in Table 3.39.

**Table 3.39: Distribution of NRI Tourists by  
Composition of Travel Group**

Sl. No.	Composition of Travel Group	% of Tourists
1	Alone	69.52
2	With spouse only	17.34
3	With children only	0.06
4	With parents only	0.31
5	With friends only	1.28
6	With spouse and children	5.06
7	With spouse and friends	0.00
8	With spouse and parents	0.03
9	With spouse, children and friends	0.00
10	With spouse, children and parents	6.40
11	With spouse, friends and parents	0.00
12	With spouse, children, friends and parents	0.00
13	Others	0.00

### **Mode of travel**

- 3.50 For traveling within India, all the modes of travel have been utilized by NRIs. Most widely used mode is Rail (49.39%), followed by Road (50.01%) and Air (1.23%) as presented Table 3.40.

**Table 3.40: Mode of Travel by NRIs Within India (In %)**

Major Mode of Travel in India	% of Tourists
Air	1.23
Rail First Class and Above	7.47
Rail Other Classes	41.92
Road Special	38.20
Road Ordinary	11.81

**Type of fare**

- 3.51 97% of NRIs came by normal fare, 1.68% NRIs made use of excursion fare and 1.32% availed concessional fare.

**Purpose of visit**

- 3.52 Table 3.41 shows the purpose of the visit of NRIs. Leisure, recreation & holiday was the purpose for 29.32%, while religious and pilgrimage was main purpose for 25.23%.

**Table 3.41: Purpose of visit by NRIs tourist (In %)**

<b>Purpose of Visit</b>	<b>% of Tourists</b>
Leisure, Recreation and Holiday	29.32
Visiting Friends and Relatives	13.91
Business & Professional	19.71
Health and Treatment	9.73
Religion and Pilgrimage	25.23
Others	2.10

***MOTIVATIONAL FACTORS*****Factors considered Very Important in choosing an overseas destination and experiences in India on those factors**

- 3.53 Almost 85% or more of the NRI tourists considered the factors such as, Tourist attraction, Climate, Expensiveness, Safety and security, Public hygiene and cleanliness, Culture and History, Friendliness of people, Ease of communication with local people, Road, Facilities at airport, International travel facilities and Good hotels as Very Important while choosing one overseas destination over another, while shopping facilities were considered as very Important by 65% of the NRI tourists. About their experiences in India on these factors, only 5.15% recorded their experience in India as Very Good, while 72.79% recorded as Good and 9.60% as Average, while 12.46% were not happy and recorded as Poor. Table 3.42 summaries their experience in India.

**Table No. 3.42: Rating of Experience in India in Respect of Various Factors (in %)**

<b>Rating of Experience</b>	<b>% of Tourists</b>
Very Good	5.15
Good	72.79
Average	9.60
Poor	12.46

## C. INDIAN RESIDENTS TRAVELLING ABROAD

- 3.54 A total of 24,96,492 Indian Residents are estimated to have gone abroad during the period January 2003 to December 2003.
- 3.55 The survey also collected some basic information from Indian Nationals traveling abroad. Salient features of the survey on outbound tourists are given in succeeding paragraphs.

### DEMOGRAPHICS

#### Gender and Age

- 3.56 A majority of Indians traveling abroad were males (71.64%) with females accounting for 28.36%. Nearly 36% of the outbound travelers were in the age group 17-30 years, nearly 30% in the age group 31-35 years and 28% in the 36-65 age group. Table 3.43 gives age-wise as well as gender-wise distribution of Indian residents going abroad.

**Table 3.43: Age and Gender wise Distribution (in %)**

Age Group	Male	Female	All
Below 16 years	1.68	0.93	2.61
17-30 years	20.52	15.47	35.99
31-35 years	21.41	8.49	29.90
36-65 years	26.35	1.50	27.85
Above 65 years	1.68	1.97	3.65
<b>All</b>	<b>71.64</b>	<b>28.36</b>	<b>100.00</b>

#### Occupation

- 3.57 Occupation wise distribution of Indian residents traveling abroad shows that 36% of them were engaged in Service (or worked as employees), followed by 22% with business as occupation, and 16.65% housewives. A distribution is given in the following Table 3.44.

**Table 3.44: Distribution of Indian Residents Traveling Abroad by Occupation (in %)**

Occupation	Male
Service	36.23
Professional	10.31
Business	21.73
Self Employed	5.76
Student	9.31
Housewife	16.65

## ***TRAVEL PATTERN***

- 3.58 A majority of Indians going abroad were traveling alone and accounted for 57.54% of the total travelers with 15.79% traveling in twos, 22.84% in group of 3 to 5, 3.11% in group size of 6 to 10, while remaining traveling in group size greater than 10. Table 3.45 gives the distribution of Indians residents traveling abroad by the size of travel group.

**Table 3.45: Percentage of tourists by size of travel groups**

Size	% of Indians
Alone	57.54
Two Persons	15.79
3 to 5 persons	22.84
6 to 10 persons	3.11
11 to 15 persons	0.57
Above 15 persons	0.14

### **Mode of Travel**

- 3.59 For traveling within the country Air was the main mode of transport used by Indian residents traveling abroad. A distribution by mode of travel within the country is given in Table 3.46.

**Table 3.46: Mode of Travel in side the country (in %)**

Size	% of Indians
Air	55.63
Rail-First Class and above	5.16
Rail-other classes	8.57
Road-Special	8.63
Road-Ordinary	22.01

### **Type of fare**

- 3.60 87.31% of the total Indian residents going abroad paid normal fares, while 10.32% availed excursion and 2.36% made use of concession fares. Almost all the Resident Indians paid normal fares except Delhi, Punjab, Tamil Nadu and West Bengal. About 50% of Delhi Residents going abroad made use of excursion facility and those from Punjab about 53%. Chattisgarh (10%), Maharashtra (6.77%) and Uttaranchal (7.45%) made use of concession fares.

### **Previous visits**

- 3.61 An analysis of the previous visits of Indian Residents going abroad, shows that 23.60% went abroad every year, while 8.97% went abroad every alternate year. 12.45% of the respondents traveled abroad once in five years, while 15.93% indicated no specific intervals for travel abroad.

**Purpose of visit**

- 3.62 Table 3.47 provides details of purpose of visits of Indian Residents going abroad. Employment was the major purpose of going abroad for 25% of these Indians, with leisure, recreation and holiday accounting for nearly 16% of these travelers..

**Table 3.47: Purpose of visit (in %)**

<b>Purpose of Visit</b>	<b>% of Indians</b>
Leisure, Recreation and Holidays	15.93
Joining Family	0.84
Visiting Friends & Relatives	4.18
Employment	25.23
Business & Professionals	19.33
Religion & Pilgrimage	11.65
Studies	14.58
Others	8.26

**Purpose of business / professional visit**

- 3.63 A further analysis of the Indians traveling for business & professional purposes shows that they were visiting abroad for the following purposes as indicated in Table 3.48.

**Table 3.48: Purpose of Business / Professional Visit (In %)**

<b>Size</b>	<b>% of Indians</b>
Installing Equipment	12.81
Meetings, Conferences	45.96
Trade Fairs / Exhibitions	22.79
Lectures / Concerts	0.38
Paid Study / Research	2.64
Others	15.42

## D. Transit Passengers

- 3.64 A total of 2000 transit passengers were surveyed at the four major exit ports (Chennai, Delhi, Kolkata and Mumbai) during the period 1<sup>st</sup> January to 31<sup>st</sup> December 2003. Country wise details of the nationalities of the transit passengers for 14 major countries which accounted for around 76% of transit passengers is given below in Table 3.49. The share of remaining countries was less than 1% each.

**Table 3.49: Country-wise Breakup of Transit Passengers (%)**

Sr.No.	Name of the country	Transit Passengers (% to total)
1	UK	9.55
2	USA	9.10
3	Nepal	9.04
4	France	8.25
5	Australia	6.85
6	Denmark	6.55
7	Canada	4.65
8	Thailand	4.55
9	Japan	3.80
10	Netherlands	3.65
11	Singapore	2.95
12	Spain	2.90
13	Russia	2.50
14	South Africa	1.40
	<b>Total 14 countries</b>	<b>75.74</b>

## DEMOGRAPHICS

### Gender and Age-wise Distribution

- 3.65 Almost 63.50% of the transit passengers were males while the remaining 36.50% were females.
- 3.66 Table 3.50 shows age-wise distribution of transit passengers.

**Table 3.50: Age Wise Distribution of Transit Passengers**

Age Group	In %
Below 16 years	0.05
17-30 years	29.05
31-35 years	43.30
36-65 years	27.10
Above 65 years	0.50

**Educational and marital status**

- 3.67 Table 3.51 indicates distribution of transit tourists by education and marital status. While 58.35% of the transit passengers were married, remaining 41.65 were not married. Of the transit passengers 11.25% were Undergraduates, 52.80 were Graduates and 35.95% were Postgraduates.

**Table 3.51: Educational and Marital Status (in %)**

Age Group	Married	Not Married	All
Undergraduate	2.65	8.60	11.25
Graduate	28.30	24.50	52.80
Postgraduate	27.40	8.55	35.95
All	58.35	41.65	100.00

**Occupation**

- 3.68 Percentage distribution of transit tourists by occupation is given in Table 3.52. It is seen that almost 40.20% had business as their occupation, with 22.35% being with service as occupation, 22.35% were professionals, while the remaining were self employed (13.50%), students (7.95%) or housewives (0.65%).

**Table: 3.52: Occupation Wise Distribution of Transit Passengers (In %)**

Occupation	% of Tourists
Service	15.35
Professional	22.35
Self-Employed	13.50
Business	40.20
Student	7.95
Housewife	0.65

***TRAVEL PATTERN*****Size of Travel Group**

- 3.69 Table 3.53 shows distribution of transit tourists by size of travel group. Almost 47% of the transit passengers were traveling alone with 32% traveling in group of twos, with remaining traveling in group size greater than three.

**Table 3.53: Travel Pattern (In %)**

Size of Travel group	% of Transit Passengers
Alone	46.50
2 persons	32.30
3-5 persons	12.90
6-10 persons	6.85
11-15 persons	1.45

**Type of Fare**

- 3.70 An analysis of the type of fare availed by transit passengers shows that 88.15% paid normal fares, while 9.75% came on excursion fare and 2.10% availed other concessional fares.

***EXPENDITURE PATTERN***

- 3.71 Transit passengers did not provide any information relating to there expenses during there waiting period for their connecting flights. During the course of discussion with them, our field surveyors were informed that for a short period halting at the lounge, neither they have time to go around nor were interested in buying anything from the airport due to prohibitive cost.

**Reasons for not visiting India**

- 3.72 45% of transit passengers lacked time to visit India; 21 % had already visited India, while 25% mentioned that there was no time and another 9% had budget constraints. This was the general pattern for all countries except for transit passengers from Canada, Germany and UAE. 65% of the transit passengers from these countries (Canada, Germany and UAE) expressed time constraint for not visiting India. Around 80% of transit passengers for North Africa and Caribbean countries also mentioned time constraint. Over 90s% of transit Passengers from South America had visited India earlier and as such did not visit India this time.

## CHAPTER IV

### SURVEY ON AIRPORT FACILITIES

- 4.1 At the suggestion of the Cabinet Secretariat, Horizon was advised by DOT in March 2003 to cover survey of Airport Facilities. The normal survey had already started in January 2003 and three months were over. The said Airport Facilities could therefore be taken up only from the month of April. Four major airports namely Mumbai, Delhi, Kolkotta and Chennai were included and the total number of passengers surveyed was 18,824, distributed as follows.

**Table 4.1: Sample Coverage of the Survey (Airport Facilities)**

Type of Passenger	Delhi	Mumbai	Chennai	Kolkatta	Total
Foreign	4650	4425	1724	675	11474
Indian	1650	2850	1050	300	5850
Transit	750	600	75	75	1500
<b>Total</b>	<b>7050</b>	<b>7875</b>	<b>2849</b>	<b>1050</b>	<b>18,824</b>

- 4.2 A suitable questionnaire was framed for eliciting the information from respondents. The main characteristics covered included: General Ambience, Entry/Exit, Cleanliness, Information and Sign Boards, Check-in-Facilities, Money Changing, Passport Control / Immigration Check, Customs Clearance, Luggage Handling, Lounge, Toilets, Refreshment Stalls/Cafeteria, Taxi Services, and Airport Bus Services.
- 4.3 The respondents were asked to rank these facilities as 'Very Good', 'Good', 'Average' and 'Poor'. Almost 80% of respondents reported General Ambience as 'Average', 10% each as 'Good' and 'Poor'. Almost 90% respondents were not satisfied at the Cleanliness and rated as 'Average'. Majority reported Information and Signboards as 'Average'. Check-in facilities were reported as 'Poor' by almost 40% of the respondents. Passport Control/Immigration Check were found to be 'Good' by around 60%. More than 90% of the passengers reported Customs Clearance as 'Good' and more than 80% reported Luggage Handling as 'Average'. 95% of the respondents found Toilets as poor. Refreshment stalls/Cafeteria were reported to be 'Poor' by large numbers. Taxi Services and Airport Bus Services were reported to be 'Poor' by more than 90% of the respondents.
- 4.4 With the proposed expansion and upgradation/modernization plans of the airports the aforesaid deficiencies can be expected to taken care of. Statistical tables Tables 4.2 to 4.15 on the results of the survey based on the response from sample of tourists are given below. Recorded observations of some of the tourists are produced after the tables.

**Table 4.2: Facility - General Ambience**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	1147	10	409	7	30	2
Average	8950	78	5265	90	1275	85
Poor	1377	12	175	3	195	13

**Table 4.3: Facility - Entry/Exit**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	3557	31	1287	22	120	8
Average	5163	45	2574	44	1320	88
Poor	2754	24	1989	34	60	4

**Table 4.4: Facility - Cleanliness**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	1147	10	-	22	120	8
Average	918	8	468	44	1320	88
Poor	9409	82	5382	34	60	4

**Table 4.5: Facility - Information and Sign Boards**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	1262	11	-	-	-	-
Average	10212	89	5265	90	375	25
Poor	-	-	585	10	1125	75

**Table 4.6: Facility - Check-in-Facilities**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	2065	18	-	-	-	-
Average	9409	82	5324	91	1305	85
Poor	-	-	526	9	195	15

**Table 4.7: Facility - Money-changing**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	-	-	-	-	-	-
Average	10556	92	5790	99	-	-
Poor	918	8	60	1	1500	100

**Table 4.8: Facility - Passport control/Immigration check**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	7688	67	3217	55	1320	88
Average	2868	25	2281	39	150	10
Poor	918	8	351	16	30	2

**Table 4.9: Facility - Customs clearance**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	10900	95	5031	86	1470	98
Average	574	5	585	10	30	2
Poor	-	-	234	4	-	-

**Table 4.10: Facility - Luggage Handling**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total	% of Total	Total	% of Total	Total	% of Total
Very Good	-	-	-	-	-	-
Good	1262	11	-	-	750	50
Average	9179	80	-	-	750	50
Poor	1033	9	5850	100	-	-

**Table 4.11: Facility - Lounge**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	9638	84	4270	73	1035	69
Average	1721	15	1170	20	390	26
Poor	115	1	410	7	75	5

**Table 4.12: Facility - Toilets**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	-	-	-	-	-	-
Average	1262	11	59	1	226	15
Poor	10212	89	5791	99	1274	85

**Table 4.13: Facility - Refreshment Stalls/Cafeteria**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	115	1	89	2	-	-
Average	1836	16	117	2	45	3
Poor	9523	83	5644	96	1455	97

**Table 4.14: Facility - Taxi Services**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	-	-	-	-	-	-
Average	688	6	702	12	-	-
Poor	10786	94	5148	88	-	-

**Table 4.15: Facility - Airport Bus Service**

Response	Foreign Nationals		Indian Nationals		Transit Passengers	
	Total No.	% of Total	Total No.	% of Total	Total No.	% of Total
Very Good	-	-	-	-	-	-
Good	-	-	-	-	-	-
Average	1033	9	-	-	-	-
Poor	10441	91	5850	100	-	-

## **RECORDED OBSERVATIONS OF INTERNATIONAL PASSENGERS**

- 4.5 Horizon fields staff were specifically advised to obtain written comments, wherever possible, from the respondents about their experiences in India about various tourism facilities and tourism stakeholders such as, taxi drivers, tour operators, guides etc. Reproduced below are verbatim observations of a few respondents, which, in a way reflect the general pattern of views of the International Passengers.

### **TAXI DRIVER, TOUR OPERATORS, GUIDES- SEXUAL HARASSMENT**

**1. Country: Slovakia, Port of Exit –Delhi, Flight No. KL 855 Date 27/06/03**

Center Tour and Travel Planner office Delhi, N. Block Cannaught Place and also Kashmir, Srinagar very bad service, we arranged and we paid for many things (hotel, car, taxi to airport) they harassed us, the tourists had to stay in the hotel annex in Delhi and the taxi fare was paid by us, though it was already collected by the Tour operator.

**2. Country: France, Port of Exit – Delhi Flight No. AF 147 Date 24/08/03**

Lost my passport and money.

**3. Country : France, Port of Exit – Delhi, Flight No. AF 147, Date 30/08/03**

In Delhi Airport taxis are not honest. We paid two times to go to main Bazaar where they did not take us. They dropped us in a very expensive dirty hotel, as we didn't have anywhere especially to go when it was our first visit in India.

**4. Country: U.K., Port of Exit – Mumbai, Flight No. BA 138 Date 29/7/03**

Very Expensive. The approach road should be improved.

**5. County – Malaysia, Port of Exit – Varanasi, Flight No. IC 752, Date 12/08/03**

We had experience where a local at Varanasi tried to take out money. We managed to clear away near the stop.

**6. Country – UK, Port of Exit- varanasi, Flight No. IC 752, Date 12/08/03**

Great experience but difficult to deal with locals, sometimes who are only interested to take our money.

**7. Country – Spain, Port of Exit – Varanasi, Fight No. IC 752 Date 16/08/03**

We need better hotel, they are too much expensive. We have to pay too much tips, I don't like military people at Airport. They intimidate myself.

**8. Country U.K., Port of Exit – Delhi, Flight No. BA 142, Date -17/09/03**

The Delhi Traffic Police cheated me of Rs. 400. I took a prepaid taxi and gave them Rs. 500 to pay. But while I was closing my purse, they exchanged the Rs. 500 bill with 100 rupee bill but could do nothing as the cost was Rs. 260. I had to give them another Rs. 160 despite having actually paid Rs. 500.

**9. Country- Netherlands, Port of Exit – Delhi, Flight No. KL872 Date 26/9/03**

People always want to make business even if they have to lie.

**10. Country :Germany, Port of Exit-Delhi, Flight No. KU 382, Date 29/01/03**

Greedy, rude people who tell lies and cheat.

**11. Country- Kuwait, Port of Exit- Mumbai, Flight No. KU 382, Date 15/02/03**

Guides are cheating by asking for money and tourists are almost annoyed. This happened in Ooty.

**12. Country: France, Port of Exit-Mumbai, Flight No. AF147, Date 20/02/03**

Charge in rupees for clicking snaps with Indians.

**13. Country –France, Port of Exit-Delhi, Flight No. AF 147, Date-13/02/03**

Taj Hotel group booked in US \$, but they changed Indian rupee and gave back change in Indian rupees. US \$ price has increased 3%. I will be writing to Taj and Indian Tourist office.

**14. Country: Singapore, Port of Exit- Delhi, Flight No. SQ 407, Date-13/5/03**

Taxi people are charging more than the normal charge, security men harass.

**15. Country: Holland, Port of Exit- Delhi, Flight No. LH 761, Date 23/03/03**

Taxi and Rickshaw are not good. Charging his own not according to meter. In India shopping complex are not interesting for us.

**16. Country: Singapore, Port of Exit-Delhi, Flight No. SQ 407, Date-15/02/03**

Taxi drivers are charging double. We are not getting the right information from the tourist counter.

**17. Country: Holland, Port of Exit- Delhi, Flight No.-LH761, Date-21-06-04**

Complaint about the guide: Sunil drank every day, not polite, asked more money, he made rude remarks and did not know enough about India to be a guide. Please take action against him.

**18. Country-Korea, Port of Exit-Delhi, Flight No. OOOOZ 348 Date-13-03-03**

Status for getting Visa for India is changing every year end getting more difficult. Most bad situation is arguing with rickshaw people who do not use meter. They ask for at least double the prices money taxi man do so.

**19. Country – France, Port of Exit-Delhi, Flight No. Af 147, Date-13/5/03**

The auto people harassed too much. Passport was stolen. Australian embassy people did not inform me about the necessity for getting a VISA stamp before leaving the country. Flights were cancelled and given to a lot of penalty.

Immigration officer at the Airport put OK to get boarding pass. A VISA transfer without P.T.R. stamping on it after staying at immigration counter they put me back to the same person who refused to pass OK result. I missed my flight

**20. Country: Germany, Port of Exit-Delhi, Flight No. KU 382, Date 28/1/03**

Unsafe for single girl.

**21. Country-Belgium, Port of Exit-Delhi, Flight No. AF 147, Date 19/9/03**

In the lounge of New Delhi Airport if you want coffee, the seller asks you a higher price because you are tourist

## CONNECTIVITY

### 1. Country-Sri Lanka, Port of Exit-Chenna, Flight No.-IC 573, Date-4/9/03

We found no connecting trains to Chennai, Varanasi or Bodhgaya except Friday, Wednesday, Monday. We wanted to see Ganga and Kauveri but lost 6 days of tour because of non availability of trains

### 2. Country: USA, Port of Exit: Delhi, Flight No. LH 761, Date 24/1/03

Roads are bad

### 3. Country: Germany, Port of Exit-Mumbai, Flight No. AF 147, Date 28/1/03

India is a great place, but needs so much improvement , everything is dirty. There is poor planning with no water, no garage clean, roads with domestic animals free in town. Buildings are very poorly built. Hotels do not have proper décor. The road to Bodhgaya and Rajasthan is in very bad shape, there are so many problem I know. It is not easy. Something should be done to make India a better place and ensure clean image.

## CLEANLINESS, PASSENGER AMENITIES

### 1. Country: France, Port of Exit-Delhi, Flight No. AF 147, Date 27/8/03

I think Indian Government must organize the rubbishes collecting and educate people for that and let this be every where and then put the rubbishes in special ecological factory like Europe.

### 2. Country: U.K, Port of Exit-Mumbai, Flight No. BA 138, Date-29/7/03

Internet/Email facilities should be available at the airport.

### 3. Country- Ethiopia, Port of Exit-Mumbai, Flight No. ET 61, Date 28/7/03

Provision of rest rooms for transit passengers.

### 4. Country-Holland, Port of Exit, Delhi, Flight No. RA 217, Date 18/9/03

I came form Kathmandu and had 8 hrs to sit in the transfer hall of Delhi, without a bank to change and place to smoke.

### 5. Country Switzerland, Port of Exit-Delhi, Flight No. KL 872, Date 17/9/03

Security, No facility for transit (VISA)

### 6. Country-USA, Port of Exit-Delhi, Flight No. UL 192, Date 19/9/03

This was my first time I landed at Delhi airport transit to Colombo. The immigration check was very unfriendly and unclear, for officers told me different confusing things, simply they did not provide the service.

### 7. Country: Sri Lanka, Port of Exit-Delhi, Flight No. UI 192, Date-6/11/03

Comparing to other countries it is not bad, because we were on a transit flight the information we got was small perhaps information signal on where to go/what to do for foreigners to get facilities are enough.

### 8. Country-Malaysia, Port of Exit-Delhi, Flight No. MH 191, Date 14/3/03

No direction at Airport. People are taking long time. You should do something about this.

**9. Country-USA, Port of Exit-Mumbai, Flight No. LH 757, Date 23/3/03**

Tourist information counters in all the airports are needed

**10. Country-USA, Port of Exit-Mumbai, Flight No. LH 757, Date-13/5/03**

Mumbai Airport is poorly designed and not made user friendly.

**11. Country-Japan, Port of Exit-Delhi. Flight No. KL-872, Date-15/2/03**

Rude officers at the Airport, no drinking water facilities.

**12. Country-UK, Port of Exit-Mumbai, Flight No. LX 173, Date 17/12/03**

Airport lounges are dreadful.

**13. Country USA, Port of Exit-Mumbai, Flight DL119, Date 19/2/03**

Imperfect toilet facilities, provide soap inside the toilet

**14. Country USA, Port of Exit-Mumbai, Flight No. LH757, Date 18/3/03**

Electricity failure, no uniformity in rates, unhygienic food, staff are not cooperative at the Bank.

**15. Country-Japan, Port of Exit-Mumbai, Flight No. KL 872, Date 18/3/03**

No drinking water at Mumbai Airport.

**16. Country USA, Port of Exit-Mumbai, Flight No. LH757, Date 14/3/03**

Excellent treatment.

**17. Country –UK, Port of Exit-Mumbai, Flight No. BA 147 Date-26/4/03**

Disappointed at the dirty, ugly appearance of the facilities on arrival.

**18. Country –USA, Port of Exit-Delhi, Flight No. LH761, Date-13/2/03**

Arrival place is totally shoddy, people at the airport are not very helpful.

**19. Country: Switzerland, Port of Exit-Delhi, Flight No. KU 382 Date-27/10/03**

The announcement was not clear and it was very loud.

**20. State-Maharashtra, Port of Exit-Mumbai, Flight No. LX 155, Date – 28/8/03**

The bathroom at the airport not clean. There should be easy transport facilities from the airport to the destination.

**21. Country:Sri Lanka, Port of Exit-Delhi, Flight No. UL 192 Date 6/11/03**

Transit passengers have to wait for long periods of time in the hall. There are insufficient services to refresh, to entertain oneself or to relax. Compared to Dubai airport the facilities and possibilities are quite limited. The atmosphere does not make you feel at home at the airport.

**22. Country : Netherlands, Port of Exit-Delhi, Flight No. OS 034 Date 7/11/03**

Better than last year more clean. But a little more can be done. You are a big city as New Delhi. People in shop/restaurant can be a little more friendly.

**23. State: Tamil Nadu, Port of Exit-Mumbai, Flight No. AI 306, Date: 22/8/03**

Customs do not charge the applicable customs duty but they need something extra which is not reflected in the receipt.

**24. State: Maharashtra, Port of Exit: Mumbai, Flight No. NW041, Date-23/8/03**

Personnel screaming at the passengers at the departure lounge should be polite & metal detector are important points of entry, the airport is congested. Provide more drinking water facilities.

**25. Country: USA, Port of Exit: Delhi, Flight No. LH 761, Date 26/1/03**

Can't hear what the loud speaker is saying. It should be clear.

**26. Country : Austria, Port of Exit- Delhi, Flight No. KU382, Date 26/1/03**

Improvement needed in facilities like fog delaying the flight.

**27. State: Hyderabad, Port of Exit-Delhi, Flight No. IC 951, Date 13/2/03**

Facilities at Airport needs drastic improvement. Faster baggage handling, user friendly courteous, responsible staff. Electronic immigration system chip card for nationals

**28. Country Singapore, Port of Exit-Delhi, Flight No. Sq 407, Date 29/1/03**

Traffic control at airport should be well monitored.

**29. Country-Malaysia, Port of Exit-Delhi, Flight No. MH 191, Date-7/2/03**

Public toilet specially railway stations need attention. Local temple guides should have guidelines. Public toilets in temples should be neat.

**30. Country-Malaysia, Port of Exit-Delhi, Flight No. MH 191, Date-9/2/03**

Airport toilets are very dirty/smelling/old fashioned.

**31. Country-Israil, Port of Exit-Delhi, Flight No. KU 382, Date 8/2/03**

People are too hassles and not clean enough.

**32. Country: Spain, Port of Exit-Delhi, Flight No. IC 752, Date-13/2/03**

Very dirty, merchants cheat. Night service at International Airport was poor/ no international standard restaurant at waiting lounge before go for check.

## EXPERIENCE

**1. Country-Germany, Port of Exit-Delhi, Flight No. AF147 Date-29/8/03**

We had beautiful 30 days in India. We enjoyed the landscapes, the places of History. But most of all the friendly, honest, joking India people. Thank you!

**2. Country-Italy, Port of Exit-Delhi, Flight No. LH 761, Date-18/2/03**

Busses are full, dirty, unclean food and water, got sick, harassed as woman.

**3. Country-Netherland, Port of Exit-Delhi, Flight No. OS 034, Date 12/2/03**

I had an idea about life in India so very poor.

**4. Country-Japan, Port of Exit-Mumbai, Flight No. AI 308, Date-13/5/03**

Too many mutilated children, dirty, polluted. Landscapes are beautiful as the people are fine.

5. **Country-Singapore, Port of Exit-Delhi, Flight No. SQ 407, Date 13/3/03**  
Too much harassing from sellers & children who always ask for some money.
6. **Country-Korea, Port of Exit-Delhi, Flight No. OZ 348, Date 15/3/03**  
People push tourists to buy and give money.
7. **Country-Singapore, Port of Exit-Delhi, Flight No. SQ 407, Date 13/3/03**  
Tour expensive particularly tickets in India.
8. **Country-Switzerland, Port of Exit-Delhi, Flight No. KU 382, Date -23/3/03**  
Cars with fast speed limit should be specified.
9. **Country-Canada, Port of Exit-Mumbai, Flight No. MI 497, Date-14/3/03**  
Railways crowded and hard to get ticket.
10. **Country-UK, Port of Exit-Mumbai, Flight No. LX173, Date 026/4/03**  
Taj Mahal was closed, no one told us before we reach there 8 hours after drive.
11. **Country-UK, Port of Exit-Mumbai, Flight No. LX 173, Date-13/2/03**  
Mr. Jag Mohan is doing a good job.
12. **Country-Canada, Port of Exit-Delhi, Flight No. LX173, Date-16/6/03**  
It may be helpful to have on hand (in airports) a small write up about India and its people. Explaining such things as average annual income, main sources of income, tax breaks on handmade traditional goods etc.
13. **Country-UK, Port of Exit-Delhi , Flight No. TC316, Date-31/7/03**  
Difficulty in buying tickets in the local transport, Separate line would help a lot.  
Email facility of conformation of ticket should be there so that they can have confirmation and have ticket.
14. **Country-France, Port of Exit-Delhi, Flight No. AF 147, Date-29/8/03**  
In Europe we are getting each and every information from the airport only (Train, buses and tickets within the country) but in India we face problem regarding the same and we could not get the tickets to Bombay.
15. **Country-Canada, Port of Exit-Trivandrum, Flight No. MI497, Date 13/5/03**  
The bears used to perform for tourists in Rajasthan. It really upset tourists. Something should be done about it. I felt many people would not come back to India after they saw these poor creatures being treated that way in Rajasthan on their tour. The police must be stopped in taking money and allowing this to continue. It is cruel, wrong, if my friends knew of such practice they would not travel to India.
16. **Country-UK, Port of Exit-Delhi, Flight No. LX173, Date-21/10/03**  
Pricing of visits to major Indian monuments is too much for foreigners. For Indians Rs.20 and for foreigners Rs. 750. Now Agra reducing female visitors to fears because of quacks chasing them. I have a video where 94 quacks are surrounding me.

## CHAPTER V

# RECOMMENDATIONS

### Introduction

- 5.1 The objective of promoting tourism in India is not only to earn more foreign exchange but also employment opportunities for many. Against major findings of the Survey a few recommendations have been made in the paragraphs below. Recommendations given herein are divided into: short term with no or marginal financial implications and medium / long term with over two-three years for implementation entailing investments.

### Short Term Measures

#### Finding: One

- i. A vast majority of respondents (63%) had reported over charging, by taxi drivers, lack of manners, ill-informed tourist guides and tour operators, misbehavior with ladies, cheating, etc in many tourist destinations like Agra, Delhi, Mumbai, Jaipur, etc.

#### Suggestions

- i. The police should be given adequate powers and additional staff to enforce discipline and change the mind set of different players in the tourism sector. State governments may examine the feasibility of constituting a special tourist police force to position at different tourist centers / tourists spots, monuments.
- ii. A code of conduct should be framed and publicised for tourist guides, taxi drivers, tour operators, travel agents etc. Concerned associations should be partnered with this proposed activity. The periodical interaction with different players in tourism sector has brought in excellent results in Sikkim.

#### Finding: Two

- i. About 90% tourists remarked that there were inordinate delays at immigration counters. These delays were attributable to lack of space and inadequate computerization, coupled with heavy rush during morning hours (midnight to 3-4 A.M.)

#### Suggestion

- i. The authorities concerned at international airports must ensure availability of more space so as to enable the Ministry of Home Affairs (MOHA) to locate additional counters and deploy more immigration officers.

- ii. The paper work involved in immigration should be reduced in line with international practice i.e; all outgoing passengers as well as incoming nationals (Indian citizens) should not have to fill in an elaborate form, and incoming foreigners should also be required to fill in only simple forms that are amenable to easy and fast processing for generation of essential input for concerned authorities like Home Affairs, DOT, Civil Aviation etc.

### **Medium / Long term Measures**

#### **Finding: Three**

- i) Sizeable percentage of tourists (55 %) opined that most of the approach roads in tourist destinations were in bad conditions causing great inconvenience and delays.

#### **Suggestion**

- i) A comprehensive study should be commissioned by the Ministry of Transport in collaboration with Department of Tourism to ascertain the status of approach roads and prepare a time bound action plan to rectify the defects to make them motorable and travel friendly in major tourist destinations. The beneficial impact of highway network and Pradhan Mantri Bharat Jodo Pariyojna scheme will be fully felt only when approach roads are available in tourist spots.

#### **Finding: Four**

- i) The affluent countries of Western Europe, North America, Japan and Australia are very far from India. Several foreign nationals (about 30%) cited that high cost of international travel stood in the way of attracting a larger number of tourists from these countries. The only way to reduce per capita cost of international travel is through group tours and charter flights. The percentage of package tourists was hardly 7% of the total foreign tourists.

#### **Suggestion**

- i) Recent steps taken by the government of India by 1) Abolition of the inland air travel tax, 2) scrapping the basic fare and foreign travel tax of Rs. 500, 3) The reduction in excise duty on aviation turbine fuel to 8% from 16% etc will go a long way in bringing down the cost of travel. Similarly the state governments should relook at exorbitant luxury taxes, sales tax etc. This will substantially reduce package tour cost thus increasing the flow of tourists. Overseas and domestic tour operators should be encouraged to organize package tours with a focus on specific tourism products like medical tourism, spiritual tourism, eco tourism etc.
- ii) Efforts must be made to draw ethnic groups other than Indians from Southeast Asian countries to places in India with Buddhist relics and scenic and cultural attractions. Steps initiated recently should be intensified and spread throughout the region. Opening of new air connectivity under the Open Skies Policy and the SAARC agreements should facilitate such flights.

### **Finding: Five**

- i) The awareness of unique tourism products like Health tourism, Ayurvedic facilities are very poor. Only 4% of the respondents were aware of the Health tourism potential in India.

### **Suggestion**

- i) DOT may consider commissioning suitable persons / agencies to bring out directories / brochures on unique tourism products, like Health tourism, and distribute to Indian missions abroad, tour operators, travel agents etc. in the target source markets.

### **Finding: Six**

- i) Dual pricing of airfares for foreign nationals and domestic passengers has been commented adversely by 30 % foreign tourists. The domestic airfares are higher by 40- 50% to Foreign Nationals compared to Indian Nationals. A tourist may spend Rs. 15000/- in coming from Dubai to Mumbai and the same amount to travel from Mumbai to Jaipur by domestic flights.
- ii) Similarly, entry fees to monuments and heritage sites are higher for foreigners than collected from the Indian Nationals

### **Suggestion**

- i) Uniform fares for foreign and Indian nationals should be charged so that wide spread feeling of discrimination is reduced.

### **Finding : Seven**

- i) Nearly thirty percent of the non-package tourists from most of the affluent countries (except West Asia and Japan) actually spend on essential items like accommodations, food etc. These low budget tourists stay for a much longer duration and visit many more places in India than the affluent tourists. They spend a much lower proportion of their total expenses, forty percent on food and accommodation. The possibility of growth of this type of budget tourists in India is substantial if appropriate promotional efforts are made.

### **Suggestion**

- i) It is necessary to provide inexpensive clean accommodation and wholesome food without frills for tourists. This is also desirable for the large number of special category tourists like senior citizen student middle income and family groups, from the affluent countries who are budget tourists. This can be done by persuading state governments to provide land at reasonable rates for building budget hotels in all tourism centers.

### **Finding: Eight**

- i) India has not succeeded in attracting family groups to visit India together in large numbers as is evident from the very low percentage of children, housewives and females amongst the tourists (10 to 15%). There is a great need for attracting tourists to visit India for the pure pleasure she offers. Historical sites, palaces and architectural monuments, hills, beaches and forests, wild life, religious and folk festivals, music and dances film and theatre, handicrafts of India must be all great attractions to foreigners.

### **Suggestion**

- i) Group tourism should be encouraged by devising suitable strategies and promotional measures to attract younger generations, housewives etc. About 50% of the tourists were repeat visitors.

### **Finding: Nine**

- i) 50 % of the tourists visit India on their own motivation or at the influence of others who had visited India earlier.

### **Suggestion**

- i) It is important that the tourists leave India with a good impression in their minds so that they would, in turn, influence others to visit India. Factors, which irritate the tourists, like cumbersome immigration and customs procedures, unethical traders, difficulties in air or rail bookings for travel within India, unsanitary conditions at places of stay and travel must therefore be given high priority for improvement.

### **Finding: Ten**

- i) Very negligible percentage (10%) of the transit passengers had visited India earlier.

### **Suggestion**

- i) Attempts may be made to attract a large proportion of the transit passengers (who have not already visited India) to visit India by offering short stopover facilities at the transit points and issues of visa on arrival.
- ii) A comprehensive survey may be commissioned by DOT amongst foreign tour operators, travel agents, those who propose to visit India but do not, transit passengers etc, to ascertain why India is not considered as a potential tourist destination.

### **Finding: Eleven**

- i) 28% of tourists expressed difficulty in obtaining fast connectivity to certain tourist spots / centers of their choice.

## Suggestion

- i) Helicopter operations have potential to improve connectivity in the country, particularly in areas where fixed wing operations are not feasible due to difficult terrain or the absence of an airfield. Hence, it is necessary that dedicated operating procedures be developed by the DGCA for helicopter operations so that they are not unduly stifled by the regulations designed for fixed wing operations, which are of an entirely different nature.
- ii) The current practice of combined provision of infrastructure services for helicopter and fixed wing operations places the former at a disadvantage. In order to overcome this limitation, separate operational areas including helipads should be developed at major airports. This would also facilitate faster movement of fixed wing aircraft, as they would not be delayed by the slow movement of helicopters.
- iii) There are many tourist centers in India, which can attract a large number of international tourists if they can easily be accessed by chartered flights. The Government should actively encourage ventures, including in the private sector, to set up small no-frill airports for catering to the needs of chartered flights, similarly, ventures should also be encouraged to set up heliports, wherever there is a demand for such services.
- iv) In order to improve air connectivity, operations to remote areas need to be encouraged since the traffic on routes in these areas might not be adequate for air transport operations to be economically viable, certain incentives will need to be given for such operations. The desirability and feasibility of giving specific incentives to low-cost, no-frills scheduled airlines should be examined. Incentives should be targeted towards small aircraft, which are more likely to be deployed on regional routes. Accordingly, the use of aircraft, (including amphibious aircraft) having a maximum certified capacity of less than 80 seats and helicopters may be encouraged through reduced charges for route navigation service and landing.
- v) In addition, state governments seeking to encourage air transport operations in remote areas should consider reducing the sales tax on ATF and AVGAS to the level of Central Sales Tax of 4%, for all operators who provide air transport services on specified un-served / under-served regional routes.

## Finding: Twelve

- i) About 60% of tourist preferred budget accommodations and only about 20% stayed in starred hotels. About 25% felt their choice of accommodation was not available.

## Suggestion

- i) To accommodate increasing number of international tourists, sufficient accommodation will have to be created especially in the budget class hotels. The government, particularly, the state governments, should consider providing suitable incentives to the private sector in terms of land or lease space and tax benefits as

given to other industries. The reduction / abolition of luxury tax would help in lowering room tariff, thereby attracting more tourists.

- ii. The Railways had identified one hundred sites for setting up budget hotels. This exercise was completed almost a decade ago. In view of this and the urgent need for additional budget hotels to bridge the gap between the demand for and supply of accommodation, it is suggested that the Railways may consider either auctioning these sites or inviting private entrepreneurs to set up hotels in the joint venture. Another option is to make available these plots to the private sector hoteliers on long-term lease.

### **Finding: Thirteen**

- i) 80 to 90% of Tourists were not satisfied with airport facilities like ambience, toilets cleanliness, cafeteria, baggage, customs clearance, security etc.

### **Suggestion**

- i. With the expansion and modernization under way, these problems are likely to be eased. It is therefore suggested that modernization & expansion of airports and other policy measures under consideration should be expedited and implemented within specified time frame.
- ii. The Government of India had appointed a high-level committee under the chairmanship of Mr. Naresh Chandra in July 2003 to prepare a road map for the civil aviation sector covering various aspects of the civil aviation. The committee submitted their report in November 2003. The acceptance and early implementation of the recommendations contained therein will bring about dramatic improvement in efficiency and structural changes in the civil aviation sector in India, which will have direct impact on the sustained development of tourism.

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