

Incredible!ndia



STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND PUBLICITY (DPP)



GOVERNMENT OF INDIA
MINISTRY OF TOURISM
MARKET RESEARCH DIVISION

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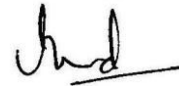
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EXECUTIVE SUMMARY

Domestic Promotion and Publicity (DPP) scheme was initiated by Ministry of Tourism with the key objective of creating a general awareness in the country about the potential of tourism destinations within the country and with the objective to develop domestic tourism market. Under Domestic Promotion and Publicity scheme, various activities for promotion of domestic tourism and spread of social awareness messages are undertaken. Campaigns are launched in electronic and print media in India to promote important tourist products of the country. In addition to that, campaigns to promote North East region and Jammu & Kashmir as tourist destinations are undertaken. Under this scheme, financial assistance is also provided to various organizations / stakeholders.

Ministry of Tourism conducted “Study on Evaluation for the Scheme of Domestic Promotion and Publicity (DPP)” through Centre for Market Research & Social Development. The study examined the efficiency of the scheme in promoting tourism within India and in developing the domestic tourism market in India. Both secondary and primary research were undertaken to generate required information. The evaluation study was intended to bring out in qualitative and quantitative terms, the efficiency and effectiveness of the activities undertaken under the scheme as well as the impact of the scheme in achieving its stated objectives.

The geographical spread of the study was all India and almost all the states in five regions of country were covered under the study. The Market Research Division of Ministry of Tourism specified 23 cities for the coverage of the study. There were eight type of semi-structured questionnaires used as data gathering and data recording instruments.

A total of 16281 tourists, 16367 local residents, 273 hoteliers, 30 industry associations, 256 tour operators, 256 travel agents, 254 tour transport operators,

100 niche industries, 40 officials of State Tourism Departments and 40 officials of India Tourism Domestic offices spread over 23 cities were contacted during the study. In addition to that, 41 projects sanctioned/ assistance provided by Ministry of Tourism under the DPP scheme during last eight year period (Five years of 11th plan- 2007-08 to 2011-12 and three years of 12th Plan-2012-13 to 2014-15) were selected for evaluation during the course of the study. The field survey and data collection was conducted during May 2016 – October 2016.

MAJOR STUDY FINDINGS

⇒ Effectiveness of advertising in different media

- Among the sources of information for the tourists' domestic tours in the recent past, friends or relatives were the source of information for 37.2% tourists, while website or internet were the source of information for 36.8% tourists, advertisement in electronic media was the source of information for 29.8% tourists, advertisement in print media was the source of information for 18.5% tourists. The Ministry must review the budget allocations and relative support to different media with the aim of generating a buzz offline as well as online so as to induce Peer-to-Peer communication. The website, portals and digital media advertising must receive more support than at present.
- In keeping with the Integrated Marketing Communication approach, the Ministry of Tourism has been running campaigns in different media such as outdoor (Atithi Devo Bhavah) , radio (CCI and HSRT), online (Destination, CCI, Atithi Devo Bhavah) for promoting tourism destinations and other campaigns namely Hunar Se Rozgar Tak and Campaign Clean India. While HSRT campaign and Atithi Devo Bhavah through hoardings has been used to a lesser degree, all other media were found to be effective for the campaigns that were being run through them.

⇒ Existing awareness and impact of the different campaigns

- One of the most prominent findings of the study is that out of the campaigns under review, Atithi Devo Bhavah has been able to create a significant impact

in terms of its reach, recall as well as its ability to induce audience to action and positive behaviour. All sections of the respondents who were asked about this campaign showed high degree of familiarity and affinity with this campaign. Close to 60 percent of the tourists as well as local residents in the respective tourist destinations remembered the campaign and a sizeable percentage of them mentioned that this campaign has had a positive behavioural impact. The other two major campaigns under the DPP scheme pertaining to Promotion of tourist destinations of North East and of Jammu & Kashmir were less remembered by different sections of the audience and their impact on behavioural change in terms of undertaking travel to these respective destinations was still less.

- Majority of the tourists (60.2%) and local residents (59.2%) are aware of the '*Atithi Devo Bhavah*' campaign, while 17.2% tourists and 16.2% local residents are aware of the 'North Eastern States' campaign, and 15% tourists and 13.7% local residents are aware of the 'Jammu & Kashmir' campaign of Ministry of Tourism. Overall, it was observed that there was significant awareness of *Atithi Devo Bhavah* campaign among the tourists and local residents, while the awareness level was found to be moderated for North Eastern States campaign and Jammu & Kashmir campaign. Even among the businesses in tourism, travel and hospitality, a significant percentage of hoteliers, tour operators, travel agents and tour transport operators are aware of *Atithi Devo Bhavah* campaign and Clean India campaign; while very few are aware of other promotion and publicity activities of Ministry of Tourism. Thus, necessary steps should be taken to create awareness among the stakeholders about the entire gamut of promotion and publicity activities of the Ministry for the promotion of tourism.
- When the tourists and local residents were asked about the impact of the promotional TV campaigns of Ministry of Tourism, 19% tourists and 12.7% local residents informed that the campaigns have motivated them to undertake a tourist travel to North Eastern India, while 14.7% tourists and 13.4% local residents informed that the campaigns have motivated them to undertake a tourist travel to Jammu and Kashmir, and 37.5% tourists and

35.4% local residents informed that the campaigns have motivated them to undertake a tourist travel to anywhere else in India. Further, 12.9% tourists and 9.1% local residents informed that the campaigns have motivated them to plan travelling to North Eastern India, while 16.4% tourists and 13.2% local residents informed that the campaigns have motivated them to plan travel to Jammu and Kashmir, and 43.9% tourists and 45.1% local residents informed that the campaigns have motivated them to consider future travel to anywhere else in India.

- When the local residents were asked to provide their views on the benefits in their area due to promotional TV campaigns of Ministry of Tourism, majority (63.7%) of the local residents reported that the tourist arrivals in their area have increased, while 47.4% reported that the areas from which domestic tourists come have increased, 41.1% reported that the attitudes of locals have become positive, and 37.9% local residents informed that job opportunities have increased in their area due to promotional TV campaigns of Ministry of Tourism.
- When the hoteliers, tour operators, travel agents and tour transport operators were asked whether there is any increment in importance of tourism due to different tourist campaigns of Ministry of Tourism, 48.4% hoteliers, 43.8% tour operators, 41.4% travel agents and 48.4% tour transport operators viewed that importance of tourism is significantly increased; while 36.6% hoteliers, 31.6% tour operators, 39.8% travel agents and 31.5% viewed that importance of tourism is little increased.
- Regarding improvement in knowledge of tourist places due to promotion campaigns of the Ministry, 32.6% hoteliers, 41.8% tour operators, 39.8% travel agents and 41.3% tour transport operators viewed that knowledge on tourist places is significantly increased; while 45.8% hoteliers, 32.8% tour operators, 38.3% travel agents and 35.8% tour transport operators viewed that that knowledge on tourist places is little increased.
- About improvement in awareness on hospitality due to promotion campaigns, 24.9% hoteliers, 26.2% tour operators, 29.7% travel agents and 19.3% tour transport operators viewed that awareness on hospitality is significantly

increased; while 38.5% hoteliers, 40.2% tour operators, 41.4% travel agents and 41.3% tour transport operators viewed that awareness on hospitality is little increased.

- About improvement in income generation due to promotion campaigns, 27.1% hoteliers, 33.6% tour operators, 30.1% travel agents and 22.8% tour transport operators viewed that income generation is significantly increased; while 44.3% hoteliers, 37.5% tour operators, 44.5% travel agents and 42.5% tour transport operators viewed that income generation is little increased.
- On improvement in cleanliness of tourist places due to promotion campaigns, 41.4% hoteliers, 49.2% tour operators, 49.6% travel agents and 49.2% tour transport operators viewed that cleanliness of tourist places is significantly increased; while 37.7% hoteliers, 36.3% tour operators, 38.3% travel agents and 35.8% tour transport operators viewed that cleanliness of tourist places is little increased.
- When the local residents were asked whether Atithi Devo Bhavah campaign of Ministry of Tourism has changed their attitude towards tourists, 36.3% local residents informed that their attitude has changed towards the tourists due to the Atithi Devo Bhavah campaign, while majority (63.7%) of the local residents informed that their attitude has not changed towards tourists due to Atithi Devo Bhavah campaign. Of the local residents, who reported that Atithi Devo Bhavah campaign has changed their attitude, 39.4% of them further said that the campaign has changed their attitude to help, care and provide safety to the tourists, while 19.1% of them said that it has changed their attitude to keep good relation with the tourists. Also, 17.2% of them said that the campaign has changed their attitude in showing good behaviour to the tourists, and 8.3% of them said that it has changed their attitude in providing a free and fearless journey to the tourists.
- During the study, views of local residents were collected on improvement in attributes due to Atithi Devo Bhavah campaign. On inculcation of good habits in local residents, 39.6% local residents viewed that it is significantly increased, while 34% viewed that it is little increased, 9.6% viewed that it is not at all increased, and 16.8% could not tell whether there is any

improvement in good habits in local residents due to Atithi Devo Bhavah campaign. In sensitizing local population for showing good behaviour towards tourists, 36.6% local residents viewed that it is significantly increased, while 34.9% viewed that it is little increased, 11.5% viewed that it is not at all increased, and 17% could not tell whether there is any improvement in sensitizing local population for showing good behaviour towards tourists due to Atithi Devo Bhavah campaign. On cleanliness of tourist places, 22.5% local residents viewed that it is significantly increased, while 44.7% viewed that it is little increased, 16% viewed that it is not at all increased, and 16.8% could not tell whether there is any improvement in cleanliness of tourist places due to Atithi Devo Bhavah campaign. On safety and security of the tourists, 37.8% local residents viewed that it is significantly increased, while 33.6% viewed that it is little increased, 9.7% viewed that it is not at all increased, and 21.9% could not tell whether there is any improvement in safety and security of tourists due to Atithi Devo Bhavah campaign.

- On improvement in local population's sensitivity for showing good behaviour towards tourists, 49.1% hoteliers, 46.5% tour operators, 48.8% travel agents and 50% tour transport operators viewed that local population's sensitivity for showing good behaviour towards tourists is significantly increased; while 33% hoteliers, 31.2% tour operators, 31.2% travel agents and 28.3% tour transport operators viewed that local population's sensitivity for showing good behaviour towards tourists is little bit increased.
- On improvement in cleanliness of tourist places, 46.2% hoteliers, 45.7% tour operators, 44.9% travel agents and 42.9% tour transport operators viewed that cleanliness of tourist places is significantly improved; while 35.9% hoteliers, 41% tour operators, 40.6% travel agents and 39.8% tour transport operators viewed that cleanliness of tourist places is little bit improved.

⇒ **Preferences of tourists and local residents**

- The tourists and local residents prefer TV followed by internet, websites, and newspapers as their source of information. Two-third respondents expressed TV as their preference.

- The stakeholders from the travel and tourism domain, including State Government tourism departments, industry associations, niche tourism organisations have desired that the timeliness of the disbursement and project processes needs to be improved at Ministry of Tourism. In terms of the campaigns, there is a need to step up the campaign for North East and Jammu & Kashmir as well as other destinations. Adventure tourism, which is fast emerging as a significant interest area needs to be projected better in the forthcoming campaigns. The use of Social Media and internet which has been introduced recently needs to be enhanced from the present levels as it is finding a great amount of favour especially among the tourists when it comes to sourcing of information. Attitude change is a difficult process and sustained campaign will be required to achieve the same.

⇒ **Impact of supporting events**

- In addition to the core events addressed specifically towards boosting tourist traffic to specific destination, Ministry of Tourism provides assistance for participating in and conducting what are termed as supporting events. These are meant to not only motivate the tourism promotion staff deployed at the state level but also engage with prospective and current tourists in order to create a better tourism experience for the tourists. The study findings suggest that there definitely is a positive impact of the supporting events at the local level be it cleaning up of tourist sites under the Swachh Bharat campaign or welcoming of tourists in a traditional manner at the airports. There are instances where the local travel and hospitality institutes have been involved in combined supporting events. These have got coverage in mainstream media too.

⇒ **Impact of supporting the events on brand name of 'Incredible India'**

There were five types of events which were stated as having been supported by MOT funds. The activities wherein 'Incredible India' branding was used prominently are as follows:

- i) Clean India Campaign (Swachh Bharat Abhiyan)
- ii) Celebration of World Tourism Day and National Tourism Day

The survey suggests that wherever, such events were organized by India Tourism office personnel, the high prominence accorded to 'Incredible India' branding is likely to have resulted in awareness and positive image of 'Incredible India' brand. Wherever the offices used the funding for remaining three activities, the 'Incredible India' branding did not benefit.

⇒ **Impact of CFA support for tourism events/ fairs and festivals**

- The fairs and festivals emerged as a significant influencer on the knowledge and behaviour of the different stakeholders including tourists and locals. However, these have largely remained a domain of State Tourism departments. All the officials of the State Tourism Departments further viewed that the fairs/festivals to which the financial assistance have been provided were useful in promoting tourism in the state.

⇒ **Impact of participation of India tourism in the major travel fairs**

- It was observed that few hoteliers, travel agents, tour operators and tour transport operators were aware of Ministry's participation in conventions, art and craft festivals, trade fairs, dance festivals, food festivals, Taj festival, spring festival, rath yatra, sports, seminars/events on tourism, etc. Overall, it was observed that the awareness and knowledge of the stakeholders on participation of Ministry of Tourism on different events/ fairs and festivals could be improved.
- The relative impact of participation of India Tourism in major travel fairs towards promotion of tourism within India was studied as part of the survey. Participation in SATTE, ITM and TTF was found to be relatively more effective than other fairs in terms of generating recall and awareness and attracting relevant traffic during participation.

⇒ **Effectiveness of release of advertisements and advertorials**

- Very few tourists (13.4%) and local residents reported that they have seen advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism, while most tourists (86.6%) and local residents said that they have not seen the advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism. However, majority of the hoteliers (66.7%), tour operators (69.9%), travel agents (65.2%) and tour transport operators (76%) said that they have seen advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism.
- Majority of the hoteliers and tour transport operators as well as about half of the tour operators and travel agents viewed that the advertisements and advertorials of the Ministry motivate people to visit the tourist places; while more than one-third hoteliers, tour operators, travel agents and tour transport operators viewed that advertisements and advertorials of the Ministry create awareness regarding different tourism projects among the people, provide information about different initiatives of Ministry of Tourism, and help to enrich the knowledge of tourism resources of the country.

⇒ **Effectiveness and impact of MDA scheme**

- On timeliness of grants of the domestic MDA scheme, adequacy of funds and ease of procedures, all the sections who had availed of the MDA scheme mentioned that there was a significant scope of improvement in the functioning of the scheme.

⇒ **Contribution of production of publicity materials and collaterals**

- Like in the case of media, there are different preferences of different stakeholders towards printed material and collaterals. The trade partners, the industry associations, the state tourism departments prefer the printed publicity material and collaterals whereas the tourists and locals did not prefer such material. There is a need to review the content and design of the printed

material to make it more friendly and attractive for tourists so that the final audience is motivated to use it.

⇒ **Usefulness of financial support to industry associations**

- Almost all the Industry associations supported under DPP were very much concerned about the delay in disbursement of funds from the Ministry of Tourism. The difficult and repetitive procedure was also pointed out by the associations. However, the industry associations were not that dissatisfied with the amount of funding received.

⇒ **Awareness and effectiveness of niche tourism products**

- Those organisations which have availed of support from Ministry of Tourism have rated their experience as good or very good but have also stated that the amount of assistance should be increased and procedures should be made easier than they are at present. Even as the interviews with the trade partners and government officials which were carried out during this study suggested that Film Tourism must be encouraged as it has huge prospects in all parts of India, the study also finds that the current awareness levels about the same are very low and this is probably the reason that it has not yet been taken seriously by stakeholders.

⇒ **Impact of financial assistance to the States/ UTs**

- Almost all the State Tourism Departments were very much concerned about the delay in disbursement of funds from the Ministry of Tourism. The wide prevalence of such an impression may have some basis. There is a need to review the process right from sanction to disbursal and take necessary steps to streamline the process if the effectiveness of the scheme is to be improved.

⇒ **Assessment of the activities undertaken by domestic offices**

- Tourism Promotion Grant and Window Display components of India Tourism offices that are supported under DPP are meeting their objectives and should be continued with increased budgetary support.

SUGGESTIONS

■ Source of information and media for different target audience

The Ministry has been running and supporting promotion campaigns in different media like T.V., radio, newspapers, magazines, internet, social media, website and outdoor media etc. The outcomes of the study suggest that different audience of the communication campaigns have different media preferences. The impact, reach and effectiveness of the communication campaigns can be enhanced in terms of recall and inducing behaviour change if the choice of communication media is in accordance with the media preferences. The messaging and campaign scheduling will have to be accordingly configured.

■ Success of the communication campaigns and projects

The Promotion and Publicity campaigns viz. Atithi Devo Bhavah, North East and Jammu and Kashmir were popular and were recalled by the target audience i.e. Tourists, locals, and trade members. The most recalled campaign was Atithi Devo Bhavah, with recall touching close to 60 percent of the tourist audience. The recall figures for other campaign were small as compared to Atithi Devo Bhavah. The impact on behaviour change and follow up actions taken by audience who were exposed to campaigns is also significantly high in case of Atithi Devo Bhavah when compared to any of the other campaigns.

The recall rate of the Atithi Devo Bhavah campaigns of 2009-10 which featured Shri Amir Khan was much higher as compared to the campaigns from 2011-12 to 2014-15 which did not feature him, Therefore, the Ministry must adopt the strategy of engaging a credible and popular celebrity along with consistent and sharply focused direct messaging to continue recording successes in its campaigns.

The impact of the campaigns

The campaigns have had an impact not only at an individual level in inducing a positive behaviour change, increasing the knowledge and inducing a travel/tour to the advertised destinations but also at a group level where, the positive behaviour change has happened to some extent with people recalling the exact behaviour change, be it in their attitude towards tourists or keeping the locations clean. In addition, the tourist traffic has increased.

One point to note here is an area of improvement. Majority of local residents felt that their attitude has not changed towards tourists due to the campaign. Ministry should recognize this and not only make changes in the campaign because attitude change requires a multi-pronged communication approach especially by personally engaging the locals rather than depending merely on a distant television campaign.

The impact of supporting events

Based on the anecdotal evidence gathered about supporting events, it will be worthwhile to increase allocations and support to the supporting events under the DPP scheme.

Outcomes related to fairs and festivals

It is recommended that increased Central funding for promoting Fairs and Festivals at an all India level must be provided and Festival Tourism be encouraged. The Ministry should develop communication around the fairs and festivals all over India and execute an integrated campaign in the days to come. This would open up an entirely new segment of tourists and tourism wherein not only will there be an experiential travel but a heightened spending during travel and tours. Fair and Festivals were universally found to be very effective means of improving domestic tourism. These need to be encouraged and focused on. Metrics must be identified and fixed for each of the fair/festival. There should be a regular review of each festival's performance against the metrics so identified.

Niche Tourism preferences

Adventure, golf, medical and wellness tourism should be provided with extra support and funds since as per this study, these are finding a lot of attraction among the tourists. More efforts awareness generation and publicity of events and partners will go a long way in improving prospects of niche tourism.

Even as the interviews with the trade partners and government officials which were carried out during this study suggested that Film Tourism must be encouraged as it has huge prospects in all parts of India, the study also finds that the current awareness levels about the same are very low and this is probably the reason that it has not yet been taken seriously by stakeholders. It is suggested that there should be special provision made to promote Film Tourism and the communication and orientation should happen at all levels and all sections of the travel and tourism industry.

Suggestions based on analysis pertaining to new campaigns

The findings of the survey of different categories of respondents indicate that the current 'Atithi Devo Bhavah' campaign enjoys a high unaided recall among all categories of respondents and a significant proportion of the respondents also acknowledged its impact on causing a positive change in attitude towards welcome and behaviour towards tourists among the target audience. The campaign has also been able to promote tourists' interest and actual travel to domestic tourist destinations. Therefore, the campaign should be continued and strengthened along the same lines to reinforce the messaging and to generate awareness among those who still are low on awareness.

The two destination tourism campaigns viz. that promoting North East India and Jammu & Kashmir have also been successful in improving the awareness and generating a preference and actual tourist flow towards these two destinations in a positive manner. It is suggested that not only the campaign promoting these

two destinations should be continued on the same lines but in order to diversify the domestic tourist inflow, certain new destinations like Karnataka (Heritage sites), Odisha (Beach as well as cultural tourism), Tamilnadu (Cultural Tourism), Uttarakhand (Religious as well as adventure tourism) need to be introduced to leverage the positive impact that destination tourism campaigns seem to be creating so far.

Suggestions based on analysis pertaining to promotional sources

Even though the survey results show lower numbers which may be due to the fact that social media and online campaigns have been introduced very recently, the investment in online promotion and social media needs to be stepped up as it is being increasingly used by tourists and travel and trade professionals to seek and verify information and for doing travel bookings. The portals which have a component of Peer-to-Peer (P2P) review and ratings should definitely be used by the Ministry for communicating its messages especially those for promoting destination tourism. Advertising through Google Adwords, Search Engine Optimisation (SEO), advertising on Facebook, Using LinkedIn and on travel e-commerce portals is a must. Travel Information portals like Tripadvisor and Lonely Planet should be exploited. The website of India Tourism, Incredible India and Ministry of Tourism should be supplemented with adequate content about destinations so that the potential and actual domestic tourists can access the information at the click of a mouse and on the go. The survey suggests that the impact of Billboards and Hoardings has so far been less. This may be due to the fact that this media has been used to a lesser degree and that too only recently. Broadly the same analysis holds true for radio. Adequate proportion of tourists surveyed did suggest that they access print media for information and that includes brochures and other promotional material of the Ministry of Tourism.

Suggestions based on analysis pertaining to new products

The analysis of the success of destination campaigns of J&K and of North East suggests that new destinations and tourism circuits should be considered and promotional campaigns on Television, Radio and on digital media need to be taken up. The relative success of participation in SATTE, TTF and in ITM suggests that the investment needs to be increased for these three fairs. The support to State Government departments for state specific fairs and festivals was found to be less than sufficient. The same was found to be true for funding for activities of India Tourism offices. These components of DPP scheme are useful and need to be supported by higher allocations.

There is a need to bring synergy between destination tourism and Niche Tourism in order to utilize the mutual reinforcing effect. A separate study for analyzing the same may be commissioned with the specific aim of bringing out the scope of such synergies all over India. This will maximize the impact of the promotion and optimize the promotion spend.

CHAPTER-I

BACKGROUND, STUDY OBJECTIVES, METHODOLOGY AND COVERAGE

1.1 BACKGROUND

Domestic Promotion and Publicity (DPP) scheme was initiated by Ministry of Tourism with the key objective of creating a general awareness in the country about the potential of tourism destinations within the country and with the objective to develop domestic tourism market.

Under Domestic Promotion and Publicity scheme, various activities for promotion of domestic tourism and spread of social awareness messages are undertaken. Campaigns are launched in electronic and print media in India to promote important tourist products of the country. In addition to that, campaigns to promote North East region and Jammu & Kashmir as tourist destinations are undertaken. Under this scheme, financial assistance is also provided to various organizations / stakeholders to organize training programmes, workshops, etc. on the tourism related topics.

The scheme broadly covers the following:

i) Media Campaigns and Promotional activities undertaken directly by MOT

- a) Media Campaigns
- b) Production of tourism related materials, collaterals and creatives.
- c) Organizing and supporting events
- d) Promotion of NICHE tourism products
- e) Miscellaneous activities

ii) Promotional activities undertaken by MOT in collaboration with other Ministries and organizations with whom it has entered into MOUs.

iii) Promotional activities undertaken in collaboration in States and UTs.

- a) CFA for organizing fairs, festivals and tourism related events
- b) CFA for production of publicity material
- c) CFA for joint advertising in print media

- d) CFA for promotion of film tourism
- e) Other activities

iv) Promotional activities undertaken in collaboration with stakeholders

- a) Support to commerce, industry and trade organizations

Ministry of Tourism intended to conduct “Study on Evaluation for the Scheme of Domestic Promotion and Publicity (DPP)” through Centre for Market Research & Social Development. The study examined the efficiency of the scheme in promoting tourism within India and in developing the domestic tourism market in India.

1.2 OBJECTIVES OF EVALUATION

The objectives of the study are as follows:

- i) Preferences for different sources of information by domestic tourists such as Online/Radio/TV/Print/any other **specifically the mobile apps.**
- ii) Existing awareness about the different campaigns of the Ministry especially in regard to Atithi Devo Bhavah, North East and Jammu & Kashmir campaigns being undertaken on T.V.
- iii) Impact of the promotional TV campaigns on local residents and tourists and increase of tourists to tourism destinations in general and North East and Jammu & Kashmir specifically.
- iv) The impact of Atithi Devo Campaigns on inculcation of good habits and sensitizing the local population for showing good behaviour towards tourists and keeping the tourism destinations clean.
- v) Impact of supporting events of different genres by MOT in terms of developing domestic tourism and creating awareness about tourism destination within the country. Whether supporting the event help in creating awareness about the brand name for incredible India.
- vi) Effectiveness of advertising in different media such as outdoor (Atithi Devo Bhavah), radio (CCI/HSRT), online (Destination/CCI/Atithi Devo Bhavah) for promoting tourism destinations and other campaigns namely Hunar se Rozgar Tak and Campaign Clean India.
- vii) Impact of extending CFA support for different tourism events/ fairs and festivals in promotion of tourism in the States/ UTs.

- viii) Impact of participation of India Tourism in the major travel fairs (SATTE/KTM/TTF/GITB/ITM/any other) in the country towards promotion of tourism within India.
- ix) Effectiveness of release of advertisements and advertorials in print media for promoting domestic tourism.
- x) Effectiveness and impact of extending financial assistance to stakeholders under the MDA scheme.
- xi) Contribution of production of publicity material and collaterals in hard copy towards promotion of tourism within the country.
- xii) Usefulness of extending financial support to industry associations for organizing events for promotion of tourism.
- xiii) Awareness about NICHE tourism products within the country and among stakeholders and effectiveness of promoting the same through events and other schemes of MOT.
- xiv) Impact of extending financial assistance to the States/ UTs for production of publicity material (hard and soft copy), joint advertising and promotion of film tourism.
- xv) Assessment of the activities undertaken by domestic offices from the funds allocated under Tourism Promotion grant and Window Display and give suggestions for the same to make the offices more effective and play a larger role for promotion of domestic tourism.
- xvi) Whether any changes/ modifications are required in the guidelines/schemes/ activities undertaken under DPP for promotion of domestic tourism?
- xvii) What tourists would like to know through the campaigns?
- xviii) Analytical outcome in terms of new campaigns, promotional sources, products based upon surveys?

1.3 STUDY APPROACH

The study was based on the Explorative, Descriptive and Analytical approach to study the objectives in-depth with regard to the specific target respondents. The estimation of necessary statistics as desired in objectives was done in addition to statistical techniques for every concerned variable of the interest under the study.

In order to measure the impact of the scheme, triangulation of research methodologies were used to obtain both quantitative and qualitative information. Triangulation research

method is the combination of multiple methods to gather data, such as documents, interviews, observations, questionnaires or surveys, when conducting primary research, at different times and in different places. Data triangulation validates data and research by cross verifying the same information.

This triangulation of data strengthens the findings of the study because of increased credibility and validity of data.

Under triangulation method, documents pertaining to the study were collected from Ministry of Tourism, State Tourism Departments and India Tourism Domestic Offices, while quantitative data was collected from the target respondents under the study. The qualitative information was collected through in depth interviews with the officials involved in implementation of the scheme.

The set of employed methodologies included those that involve measurement of the programme success on the basis of already existing measures and measurement of the success of the programmes by constructing new measures.

1.4 STUDY METHODOLOGY

The multiple objectives of the study dictate us to adopt a triangulation of basic research techniques. The below mentioned methods for data collection were employed keeping in mind the nature of the multiple objectives of the study. Both secondary and primary research were undertaken to generate required information.

The evaluation study was intended to bring out in qualitative and quantitative terms, the efficiency and effectiveness of the activities undertaken under the scheme as well as the impact of the scheme in achieving its stated objectives.

1.4.1 Secondary Research

The secondary sources included necessary relevant literature pertaining to the scheme implementation. Secondary sources were carried out to refine the objectives and provide lines of enquiry for the next stage. Specially, the desk research phase gathered information on the status of implementation of the scheme. All data, reports and statistics available at various sources were collected for undertaking in-depth analysis. Besides various reports and literatures available on the subject including proposals & reports were also thoroughly examined and relevant inputs were made part of the

report. In particular, reviews and assessments were undertaken on the following aspects:

(i) In the first phase exhaustive desk research was undertaken i.e. study of relevant background material on the scheme, fund released under different components of the scheme, details of projects sanctioned and year wise allocations and their details, and other such material were collected from the scheme implementing officials.

(ii) In the second phase, field study was carried out. The field study consisted of in-depth interviews, interactions and discussions with different stakeholders involved in the scheme implementation, feedback of the officials implementing the schemes, industry associations, niche industries, etc.

The study also involved collection of secondary data from publications of Government and industry associations, market research and survey reports done on a related relevant topic by organizations and institutions in public and private sector, tourism research and sector study reports in the public domain and relevant information available on the internet. Relevant data particularly related to implementation arrangements, programme administration, project monitoring, fund disbursement system and its adequacy, feed-back mechanism from top-to-bottom and bottom-to-top, etc. were obtained from the scheme implementing officials.

1.4.2 Primary Research

The methodology involved extensive primary research where both quantitative and qualitative survey technique were used for collection of data. The primary research method was aimed at gaining a deep sense of understanding of the impact of the scheme, performance and effectiveness of the scheme.

The study also involved collection of primary data from a representative sample of stakeholders in the domestic tourism sector. Face-to-face interviews were undertaken for collection of primary data from different category of stakeholders.

1.5 STUDY COVERAGE

The geographical spread of the study is all India. Almost all the states in five regions of country were covered under the study. The Market Research Division of Ministry of Tourism specified the following cities for the coverage of the study.

I. All India (except NE) : 16 Cities

1. Andaman & Nicobar, (Port Blair),
2. Bihar (Patna)
3. Delhi
4. Goa (Panaji)
5. Karnataka (Bangalore)
6. Kerala (Kochi)
7. Madhya Pradesh (Indore),
8. Maharashtra (Aurangabad)
9. Maharashtra (Mumbai)
10. Odisha (Bhubaneshwar)
11. Rajasthan (Jaipur),
12. Tamil Nadu (Chennai)
13. Telangana (Hyderabad)
14. Uttar Pradesh (Agra)
15. Uttar Pradesh (Varanasi)
16. West Bengal (Kolkata)

II. North East : 4 Cities

1. Arunachal Pradesh (Naharlagun),
2. Assam (Guwahati)
3. Manipur (Imphal)
4. Meghalaya (Shillong)

III. Jammu & Kashmir : 3 Cities

1. Jammu
2. Srinagar
3. Leh

1.6 STUDY RESPONDENTS AND STUDY QUESTIONNAIRES

There were eight type of semi-structured questionnaires used as data gathering and data recording instruments. The questionnaires were developed with the help of detailed mapping of the areas of enquiry as mentioned in the study objectives to meet all the requirements of the study. The categories of respondents and the respective questionnaires for the primary research are presented in the following table.

Table-1.1: Study respondents and study questionnaires

Sl. No.	Category of Respondent	Questionnaire
1	Tourists	Tourist Questionnaire (Q1)
2	Local Residents	Local Resident Questionnaire (Q2)
3	Hoteliers	Hotelier Questionnaire (Q3)
4	Industry Associations	Industry Association Questionnaire (Q4)
5	Tour Operators	Travel Agent/ Tour Operator/ Tour Transport Operator Questionnaire (Q5)
6	Travel Agents	Travel Agent/ Tour Operator/ Tour Transport Operator Questionnaire (Q6)
7	Tour Transport Operators	Travel Agent/ Tour Operator/ Tour Transport Operator Questionnaire (Q6)
8	Niche industries	Niche Industry Questionnaire (Q6)
9	State/UT Officials	State/UT Official Questionnaire (Q7)
10	India Tourism Domestic Officials	India Tourism Domestic Official Questionnaire (Q8)

1.7 SAMPLING PROCEDURE AND SAMPLE SIZE

1.7.1 Sampling Procedure

The sampling design is crucial to collecting data that is accurate. The following table shows the sampling design for the present study.

Table-1.2: Sample design for the study

Sl. No.	Category of Respondents	Definition of population	Sampling method
1	Tourists	All the Indian tourists who are in the selected cities during the days of the survey	Purposive/ Judgmental
2	Local Residents	All the residents of localities near main tourist spots (5 km. radius)	Purposive/ Judgmental
3	Hoteliers	All the hotels which are in the selected cities being surveyed. Each category of hotel was picked up in broad proportion to the numbers in the town	Quota Sampling
4	Industry Associations	All Office(s) of Chambers of commerce (FICCI, CII, ASSOCHAM), Trade associations of hotels, tour operators, travel agents, transporters	Quota Sampling
5	Tour Operators	All the tour operators which run tours in the selected cities. Each category of tour operator picked up in broad proportion to the numbers in the city	Quota Sampling
6	Travel Agents	All the travel agents which have presence in the selected cities. Each category of travel agent picked up in broad proportion to the numbers in the city	Quota Sampling
7	Tour Transport Operators	All the tour transport operators who run tours in the selected cities. Each category of tour transport operator	Quota Sampling

		picked up in broad proportion to the numbers in the city	
8	Niche Industries	Industries which run niche businesses like medical, wellness, golf, film tourism, etc.	Quota Sampling
9	State/UT Officials	Officer level employees of the offices of State/UT Tourism involved in scheme implementation	Purposive Sampling
10	India Tourism Domestic Officials	Officer level employees of the offices of India Tourism Domestic Offices involved in scheme implementation	Purposive Sampling

1.7.2 Sample Size

1.7.2.1 Sample size of respondents

The sample size for different category of respondents is given below:

Table-1.3: Sample size of respondents

Sl. No.	Category of Respondents	Sample size guideline	Sample Size (n)
1	Tourists	All India -16 cities @ 800 Per City North East – 4 cities @ 400 Per City J&K – 3 cities @ 600 Per city	16281
2	Local Residents	All India -16 cities @ 800 Per City North East – 4 cities @ 400 Per City J&K – 3 cities @ 600 Per city	16367
3	Hoteliers	5% of the projects sanctioned / assistance provided	273
4	Industry Associations	5% of the projects sanctioned / assistance provided	30
5	Tour Operators	5% of the projects sanctioned / assistance provided	256
6	Travel Agents	5% of the projects sanctioned / assistance provided	256

7	Tour Transport Operators	5% of the projects sanctioned / assistance provided	254
8	Niche industries	5% of the projects sanctioned / assistance provided	100
9	State Governments	Officers from each State/UT	40
10	India Tourism Domestic Officials	Officers from each India Tourism Domestic office	40

Table-1.4: City wise respondents covered under the study

Sl. No.	City	Tourists	Locals	Hotelier	Tour Operator	Travel Agent	Tour Transport Operator	Ind. Ass.	Niche Indus.	State Official	IT Domestic Officials
All India -16 cities											
1	Andaman & Nicobar, (Port Blair)	802	800	6	7	10	7			2	2
2	Bihar (Patna)	816	803	12	12	11	13			2	2
3	Delhi	802	806	15	15	15	15			2	2
4	Goa (Panaji)	801	802	5	6	2	4			2	2
5	Karnataka (Bangalore)	803	808	12	10	10	10			3	2
6	Kerala (Kochi)	806	861	13	13	6	7			2	2
7	Madhya Pradesh (Indore)	804	803	16	15	15	15			2	2
8	Maharashtra (Aurangabad)	806	800	15	7	14	15			-	2
9	Maharashtra (Mumbai)	804	817	11	19	13	13			2	2
10	Odisha (Bhubaneswar)	812	808	15	12	13	13			2	2
11	Rajasthan (Jaipur)	805	805	17	14	14	17			2	2
12	Tamil Nadu (Chennai)	801	801	10	8	6	11			2	2
13	Telengana (Hyderabad)	804	809	6	10	15	10			2	2
14	Uttar Pradesh (Agra)	800	803	15	15	15	15			-	2
15	Uttar Pradesh	801	804	15	14	14	14			2	2

Sl. No.	City	Tourists	Locals	Hotelier	Tour Operator	Travel Agent	Tour Transport Operator	Ind. Ass.	Niche Indus.	State Official	IT Domestic Officials
	(Varanasi)										
16	West Bengal (Kolkata)	803	809	12	12	15	12			3	2
Northern East : 4 Cities											
17	Arunachal Pradesh (Naharlagun)	401	406	15	11	7	12			2	2
18	Assam (Guwahati)	401	404	12	10	9	7			2	2
19	Manipur (Imphal)	400	403	8	4	16	3			2	2
20	Meghalaya (Shillong)	402	404	7	14	8	10			2	2
Jammu & Kashmir : 3 Cities											
21	Jammu	602	600	12	10	10	9			-	-
22	Srinagar	600	602	12	10	10	10			2	-
23	Leh	605	609	12	8	8	12			-	-
		16281	16367	273	256	256	254	30	100	40	40

1.7.2.2 Sample size of projects evaluated

As per the guidelines, 5 percent of projects of each category were taken from every year of the eight year period (Five years of 11th plan- 2007-08 to 2011-12 and three years of 12th Plan-2012-13 to 2014-15). In a year, if the number of projects in a category is less than 10, all the projects were selected for evaluation.

Based on the above guidelines, for selection of projects, a list of projects sanctioned/ assistance provided was prepared. It was ensured that all zones of the country are proportionately represented. The numbers of projects evaluated during the course of the study are as follows:

Table-1.5: Sample Size of Projects

Year	No. of projects of category 'a1'	Sample size- 5% of (2) or 100% if (2) <10	No. of projects of category 'a2 - Niche'	Sample size- 5% of (4) or 100% if (4) <10	No. of projects of category 'b'	Sample size- 5% of (6) or 100% if (6) <10	No. of projects of category 'c'	Sample size- 5% of (8) or 100% if (8) <10	No. of projects of category 'd'	Sample size- 5% of (10) or 100% if (10) <10	Total projects to be evaluated (3)+(5)+(7) +(9)+(11)
(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	(11)	(12)
2007-08	NA	NA	0	0	0	0	51	3	0	0	3
2008-09	NA	NA	0	0	0	0	55	3	0	0	3
2009-10	11	1	0	0	0	0	51	2	0	0	3
2010-11	11	1	0	0	0	0	65	3	29	2	6
2011-12	12	1	0	0	0	0	56	3	3	3	7
2012-13	11	1	30	2	0	0	33	2	3	3	8
2013-14	17	1	27	1	0	0	28	1	4	4	7
2014-15	19	1	26	1	0	0	18	1	10	1	4
Total	81	6	83	4	0	0	357	18	49	13	41

Framework for Selection of Projects

As stated above, 41 projects were evaluated as per a defined framework containing parameters mutually agreed with Ministry of Tourism. The description of categories of projects evaluated under the study is as follows:

Category (a1): Media Campaigns and Promotional activities undertaken directly by MoT

- i. Media Campaigns
- ii. Production of tourism related materials, collaterals and creatives.
- iii. Organizing and supporting events
- iv. Miscellaneous activities

Category (a2): Promotion of NICHE tourism products

Category (b): Promotional activities undertaken by MOT in collaboration with other Ministries and organizations with whom it has entered into MOUs.

Category (c): Promotional activities undertaken in collaboration in States and UTs

- i. CFA for organizing fairs, festivals and tourisms related events.
- ii. CFA for production of publicity material
- iii. CFA for joint advertising in print media.
- iv. CFA for promotion of film tourism.
- v. Other activities.

Category (d): Promotional activities undertaken in collaboration in stakeholders

- i. Support to commerce, industry and trade organizations
- ii. Assistance to tourism, travel and hospitality trade associations
- iii. MDA scheme for promotion of domestic tourism

1.8 MAIN SURVEY

The field survey and data collection was conducted during May 2016 – October 2016. Data collection was conducted by adequate number of research coordinators of the organization. The key study team members monitored the data collection procedure during the main survey. All the filled-in questionnaires were checked and scrutinized by the supervisors.

1.9 DATA QUALITY AND DATA MANAGEMENT

The quality of data was ensured by imparting quality training to the study team members, research coordinators and supervisors for the survey. Besides these, regular scrutiny of questionnaires, computer based data checking was conducted to clean the database for the final analysis. All the questionnaires were scrutinized prior to the data entry. All questionnaires were scrutinized on the basis of specially drafted Scrutiny Notes and data analysis was done as per the Analysis Plans. Prior to data analysis, data was entered in the MS Excel package and subjected to all the relevant range and consistency checks. Finally, data was entered in SPSS 12.0 version and analyzed according to the analysis plan.

CHAPTER-II

PARTICULARS OF THE STAKEHOLDERS

Total 16281 tourists were interviewed from the selected 23 cities across the country. While 1807 (11.1%) tourists were covered from the north-eastern states, 1604 (9.9%) tourists were covered from Jammu & Kashmir, and rest 12870 (79%) tourists were covered from the rest of India. Also, total 16367 local residents were interviewed from the selected 23 cities across the country. While 1811 (11.1%) local residents were covered from the north-eastern states, 1617 (9.9%) local residents were covered from Jammu & Kashmir, and rest 12939 (79%) local residents were covered from the rest of India.

Table-2.1: Coverage of the tourists and local residents

Coverage	Tourists		Locals	
	n	%	n	%
North Eastern States	1807	11.1	1811	11.1
Jammu & Kashmir	1604	9.9	1617	9.9
Rest of India	12870	79.0	12939	79.0

Also, total 273 hoteliers, 256 tour operators, 256 travel agents and 254 tour transport operators were surveyed to collect requisite information for the purpose of the study.

2.1 Gender classification of tourists and locals

Majority of the surveyed tourists (76.4%) and local residents (81.3%) were found to be male. The percentage of surveyed female tourists and local residents were 23.6% and 18.7% respectively.

Table-2.2 Gender classification of the tourists and locals

Gender	Tourists		Locals	
	n	%	n	%
Male	12444	76.4	13311	81.3
Female	3837	23.6	3056	18.7

Chart-2.1: Gender classification of the tourists and local residents

2.2 Age of the tourists and local residents

Analyzing the age pattern of the surveyed tourists, it is seen that 25.4% of the tourists are below 25 years of age, while 46% tourists come under the age group of 25 to 35 years, 19.6% tourists belong to the age group of 36 to 50 years, 6.8% tourists belong to the age group of 51 to 65 years, and 2.1% tourists belong to the age group of above 65 years.

Analyzing the age pattern of the surveyed local residents, it is seen that 25.2% local residents are below 25 years of age, while 45.6% local residents come under the age group of 25 to 35 years, 21.4% local residents belong to the age group of 36 to 50 years, 6.2% local residents belong to the age group of 51 to 65 years, and 1.6% local residents belong to the age group of above 65 years.

Table-2.3: Age of the tourists and local residents

Age	Tourists		Locals	
	n	%	n	%
Below 25 years	4143	25.4	4118	25.2
25 to 35 years	7496	46.0	7462	45.6
36 to 50 years	3188	19.6	3507	21.4
51 to 65 years	1109	6.8	1017	6.2
Above 65 years	345	2.1	263	1.6

Chart-2.2: Age of the tourists and local residents



2.3 Marital Status of tourists and local residents

Marital status of the tourists and local residents reveals that majority tourists (63.4%) and local residents (62.3%) are married, while 36.6% tourists and 37.7% local residents are unmarried.

Chart-2.3: Marital status of the tourists and local residents

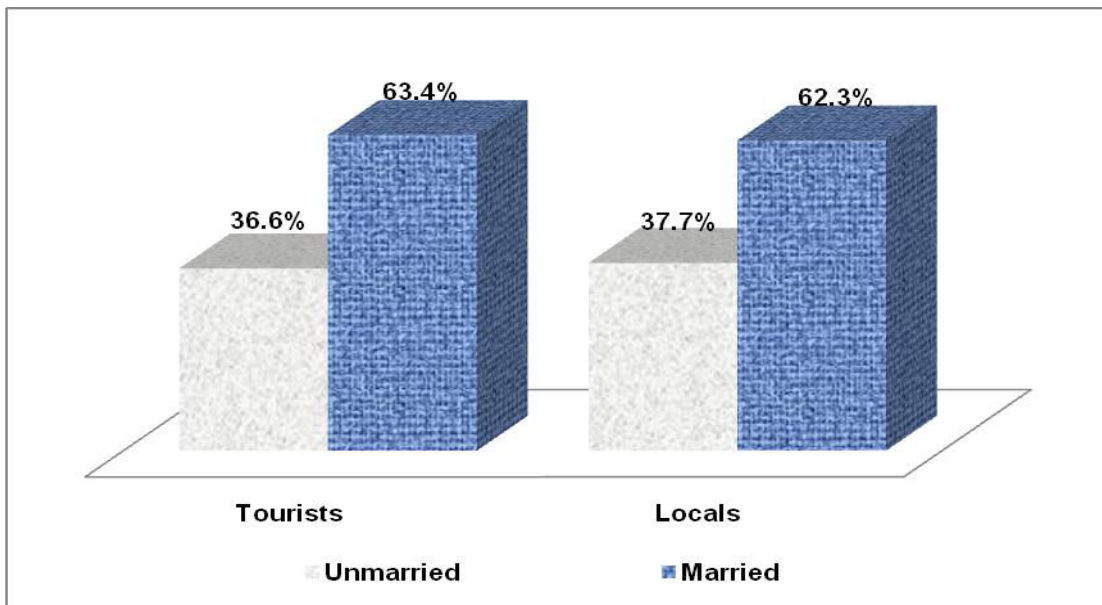


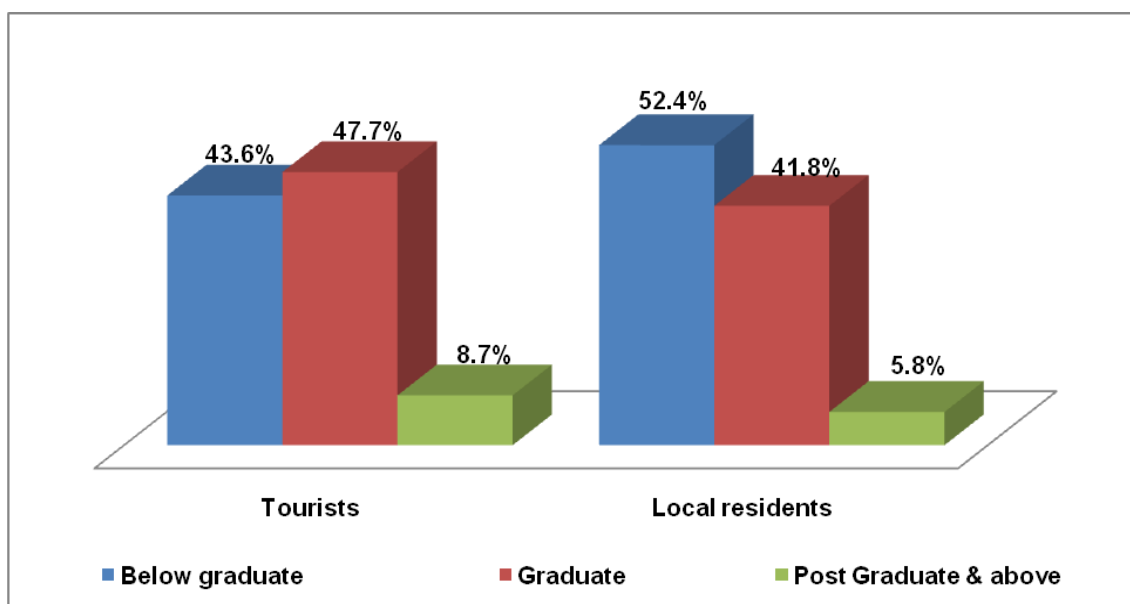
Table-2.4: Marital status of the tourists and local residents

Marital status	Tourists		Locals	
	n	%	n	%
Unmarried	5966	36.6	6170	37.7
Married	10315	63.4	10197	62.3

2.4 Educational status of tourists and local residents

The educational status of the tourists reveals that 43.6% tourists are below graduate, while 47.7% tourists are educated up to graduation and 8.7% tourists are educated up to post graduation or above than that.

Similarly, the educational status of the local residents reveals that 52.4% local residents are below graduate, while 41.8% local residents are educated up to graduation and 5.8% local residents are educated up to post graduation or above than that.

Chart-2.4: Education status of the tourists and local residents**Table-2.5: Education status of the tourists and local residents**

Education status	Tourists		Locals	
	n	%	n	%
Below graduate	7095	43.6	8570	52.4
Graduate	7773	47.7	6843	41.8
Post Graduate & above	1413	8.7	954	5.8

2.5 Occupation of tourists and local residents

When the study intended to find the occupation of the tourists, it was found that 31.8% tourists are in service, 29.7% are in business, 7.2% are housewives, 2.6% are retired persons. Also, more than one-fifth (21.6%) tourists were found to be students while very few (0.7%) tourists reported that they were unemployed.

Similarly, when the study intended to find the occupation of the local residents, it was found that 34.8% are in business, 27.2% are in service, 3.6% are housewives, 2.4% are retired persons. Also, one-fifth (20.1%) local residents were found to be students while very few (0.2%) local residents reported to be unemployed.

Chart-2.5: Occupation of the tourists and local residents

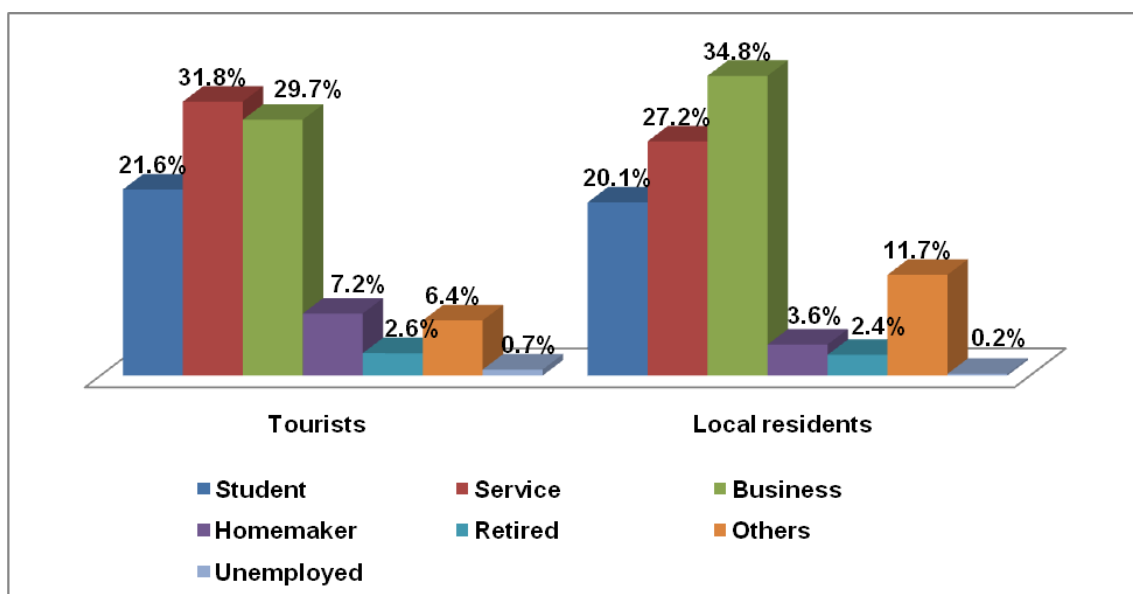


Table-2.6: Occupation of the tourists and local residents

Occupation	Tourists		Locals	
	N	%	n	%
Student	3517	21.6	3284	20.1
Service	5172	31.8	4459	27.2
Business	4828	29.7	5701	34.8
Homemaker	1168	7.2	587	3.6
Retired	431	2.6	391	2.4
Others	1049	6.4	1920	11.7
Unemployed	116	0.7	25	0.2

2.6 Annual income of different stakeholders

Data on annual income of tourists shows that 24.6% have an annual income of below Rs. 1 lakh, while 25.9% have an annual income between Rs. 1 lakh to Rs. 2 lakh, 19.2% have an annual income of above Rs. 2 lakh to Rs. 5 lakh, 7.8% have an annual income of above Rs. 5 lakh to Rs. 10 lakh, and 2.2% tourists have an annual income of above Rs. 10 lakh. During the survey, 10.4% tourists did not disclose their annual income.

Data on annual income of local residents shows that 30.8% have an annual income of below Rs. 1 lakh, while 35.1% have an annual income between Rs. 1 lakh to Rs. 2 lakh, 19.1% have an annual income of above Rs. 2 lakh to Rs. 5 lakh, 4.8% have an annual income of above Rs. 5 lakh to Rs. 10 lakh, and 1.7% tourists have an annual income of above Rs. 10 lakh. During the survey, 8.5% tourists did not disclose their annual income.

Overall, it was observed that majority of the tourists (60.5%) and local residents (65.9%) have an annual income of up to Rs. 2 lakh.

Chart-2.6: Annual income of the tourists and local residents

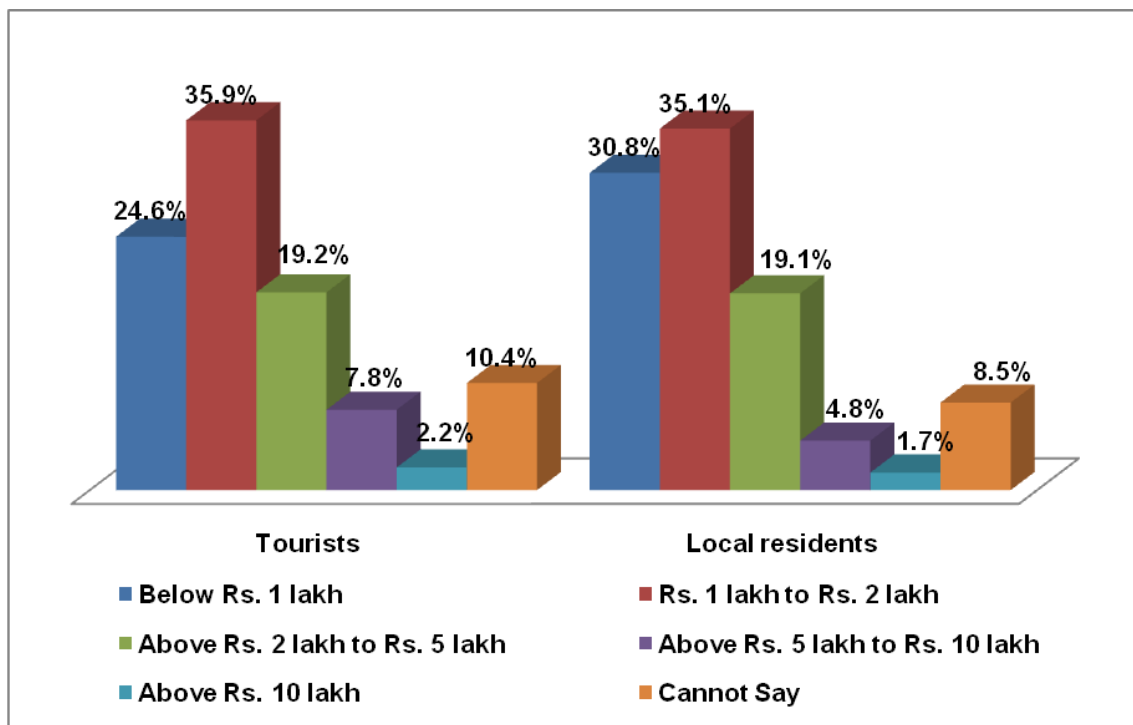


Table-2.7: Annual income of the tourists and local residents

Annual Income (Rs.)	Tourists		Locals	
	n	%	n	%
Below 1 lakh	4001	24.6	5041	30.8
1 lakh to 2 lakh	5845	35.9	5749	35.1
Above 2 lakh to 5 lakh	3119	19.2	3119	19.1
Above 5 lakh to 10 lakh	1264	7.8	785	4.8
Above 10 lakh	357	2.2	274	1.7
Cannot Say	1695	10.4	1399	8.5

The study also observed that the annual income of majority of the surveyed hoteliers, tour operators, travel agents and tour transport operators was above Rs. 5 lakh, while 42.8% hoteliers' annual income was up to Rs. 5 lakh. Few hoteliers, tour operators, travel agents and tour transport operators did not disclose their income during the survey.

Chart-2.7: Annual income of the hoteliers, tour operators, travel agents and tour transport operators

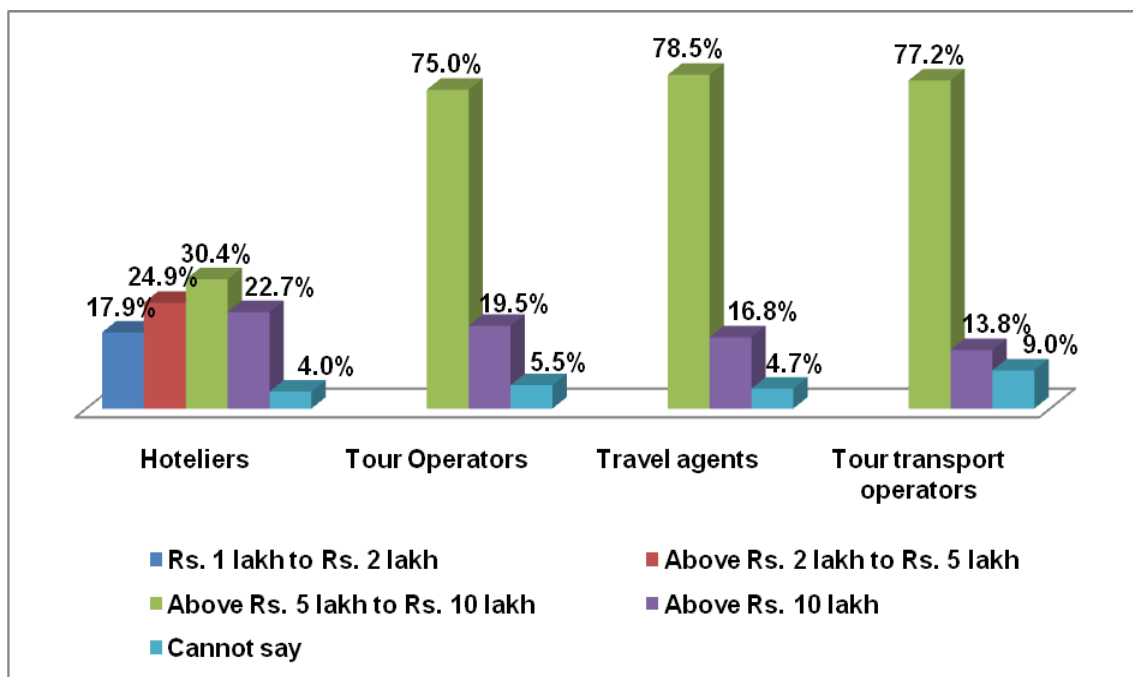


Table-2.8: Annual income of the hoteliers, tour operators, travel agents and tour transport operators

Annual Income (Rs.)	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
1 lakh to 2 lakh	49	17.9	-	-	-	-	-	-
Above 2 lakh to 5 lakh	68	24.9	-	-	-	-	-	-
Above 5 lakh to 10 lakh	83	30.4	192	75.0	201	78.5	196	77.2
Above 10 lakh	62	22.7	50	19.5	43	16.8	35	13.8
Cannot say	11	4.0	14	5.5	12	4.7	23	9.0

CHAPTER-III

EFFECTIVENESS OF ADVERTISING IN DIFFERENT MEDIA

3.1 Sources of information for the tourists' domestic tours in recent past

When the study tried to identify the sources of information for the tourists' domestic tours in the recent past, friends or relatives were the source of information for 37.2% tourists, while website or internet were the source of information for 36.8% tourists, advertisement in electronic media was the source of information for 29.8% tourists, advertisement in print media was the source of information for 18.5% tourists, publicity material of Ministry of Tourism/ State Tourism was the source of information for 9.1% tourists, information centre was the source of information for 6.2% tourists, mobile apps was the source of information for 5.6% tourists, bill board/ hoarding was the source of information for 0.9% tourists and 0.2% tourists reported that source other than the above was the source of information for them for their recent domestic tours.

Chart-3.1: Sources of information for the tourists' domestic tours in recent past

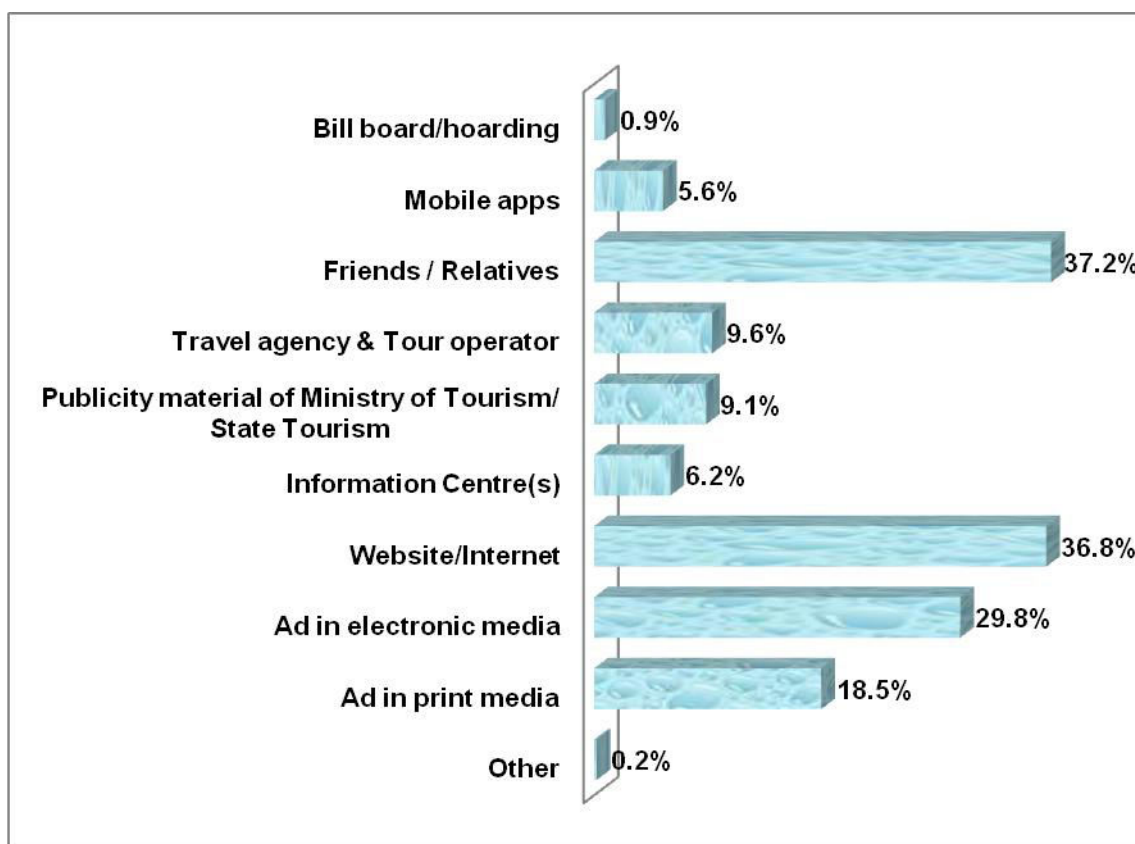


Table-3.1: Sources of information for the tourists' domestic tours in recent past

Sources of information	n	%
Ad in print media	3007	18.5
Ad in electronic media	4851	29.8
Website/Internet	5984	36.8
Information Centre(s)	1004	6.2
Publicity material of Ministry of Tourism/ State Tourism	1489	9.1
Travel agency & Tour operator	1556	9.6
Friends / Relatives	6059	37.2
Mobile apps	906	5.6
Bill board/hoarding	140	0.9
Other	35	0.2

3.2 Medium of awareness

The study further noticed that TV, internet and newspaper are the major mediums for the tourists and local residents in which they have seen different campaigns of Ministry of Tourism; while magazines, radio, website, TV, movies and social media are the key minor mediums in which different campaigns of Ministry of Tourism are seen by the tourists and local residents.

Chart-3.2: Key major mediums in which the tourists and locals have seen the campaigns

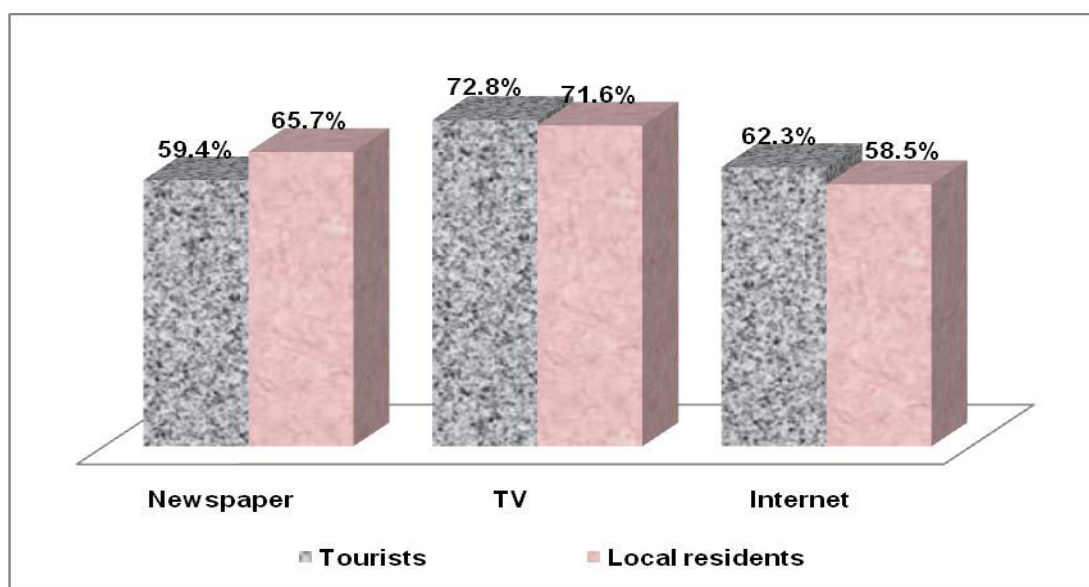


Chart-3.3: Key minor mediums in which the tourists and locals have seen the campaigns

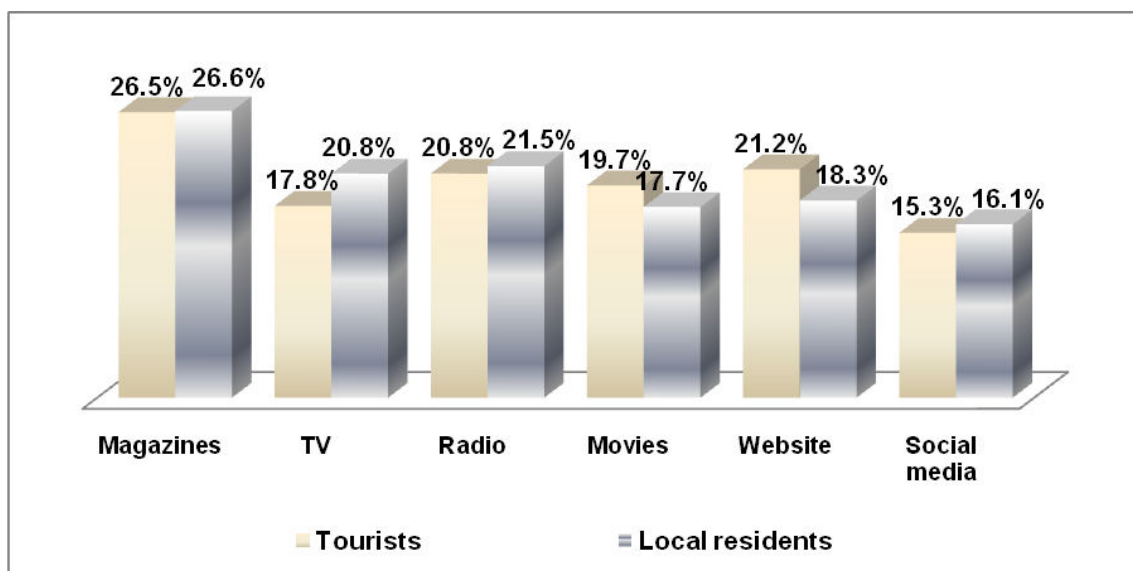


Table-3.2: Medium in which the tourists and locals have seen the campaigns

Medium		As major media category				As minor media component			
		Tourists		Locals		Tourists		Locals	
		n	%	N	%	n	%	n	%
Print	Newspaper	9678	59.4	10747	65.7	2387	14.7	2231	13.6
	Magazines	794	4.9	342	2.1	4319	26.5	4360	26.6
	Information brochure of Ministry of Tourism	539	3.3	344	2.1	1100	6.8	1028	6.3
	Information brochure of State Government	53	0.3	107	0.7	1266	7.8	1154	7.0
Electronic	TV	11855	72.8	11722	71.6	2903	17.8	3407	20.8
	Radio	359	2.2	781	4.8	3381	20.8	3523	21.5
	Promotional CD	104	0.6	90	0.5	995	6.1	644	3.9
	Movies	252	1.5	298	1.8	3201	19.7	2898	17.7
	Bill board	13	0.1	45	0.3	680	4.2	754	4.6

Online	Internet	10137	62.3	9567	58.5	1005	6.2	1067	6.5
	Website	305	1.9	313	1.9	3447	21.2	2990	18.3
	Promotional e-mail	102	0.6	83	0.5	1182	7.3	522	3.2
	Social media	2504	15.4	2482	15.2	2499	15.3	2646	16.1

3.3 Effectiveness of advertising in different media such as outdoor, radio and online for promoting tourism destinations and other campaigns like Hunar Se Rozgar Tak (HSRT) and Campaign Clean India (CCI)

In keeping with the Integrated Marketing Communication approach, the Ministry of Tourism has been running campaigns in different media such as outdoor (Atithi Devo Bhavah), radio (CCI and HSRT), online (Destination, CCI, Atithi Devo Bhavah) for promoting tourism destinations and other campaigns namely Hunar Se Rozgar Tak and Campaign Clean India. During the course of this study, the locals and the tourists were asked to respond to questions related to recall of the campaigns in different media and their influence in shaping their respective behaviour and choices. Based on the percentage of responses to each of the relevant questions, the following table depicts the effectiveness of the different media in generating awareness and influencing behaviour and choices:

Table-3.3: Extent of effectiveness of the medium for the campaign

S. No.	Medium and Campaign	Very effective/ Effective	Less effective/ Ineffective	Cannot say/ Indeterminate
1	Outdoor Hoardings for Atithi Devo Bhavah		√	
2	Radio for CCI	√		
3	Radio for HSRT			√
4	Destination promotion through online	√		
5	CCI through online	√		
6	Atithi Devo Bhavah through online	√		

CHAPTER-IV

EXISTING AWARENESS ABOUT THE DIFFERENT CAMPAIGNS OF THE MINISTRY

4.1 Existing awareness about the different campaigns

When the study tried to find the existing awareness of the tourists and local residents about the different campaigns of Ministry of Tourism, it was observed that majority of the tourists (60.2%) and local residents (59.2%) are aware of the 'Atithi Devo Bhavah' campaign, while 17.2% tourists and 16.2% local residents are aware of the 'North Eastern States' campaign, and 15% tourists and 13.7% local residents are aware of the 'Jammu & Kashmir' campaign of Ministry of Tourism. Overall, it was observed that there was significant awareness of *Atithi Devo Bhavah* campaign among the tourists and local residents, while the awareness level was found to be moderated for North Eastern States campaign and Jammu & Kashmir campaign.

Chart-4.1: Campaigns of Ministry of Tourism seen by the tourists and locals

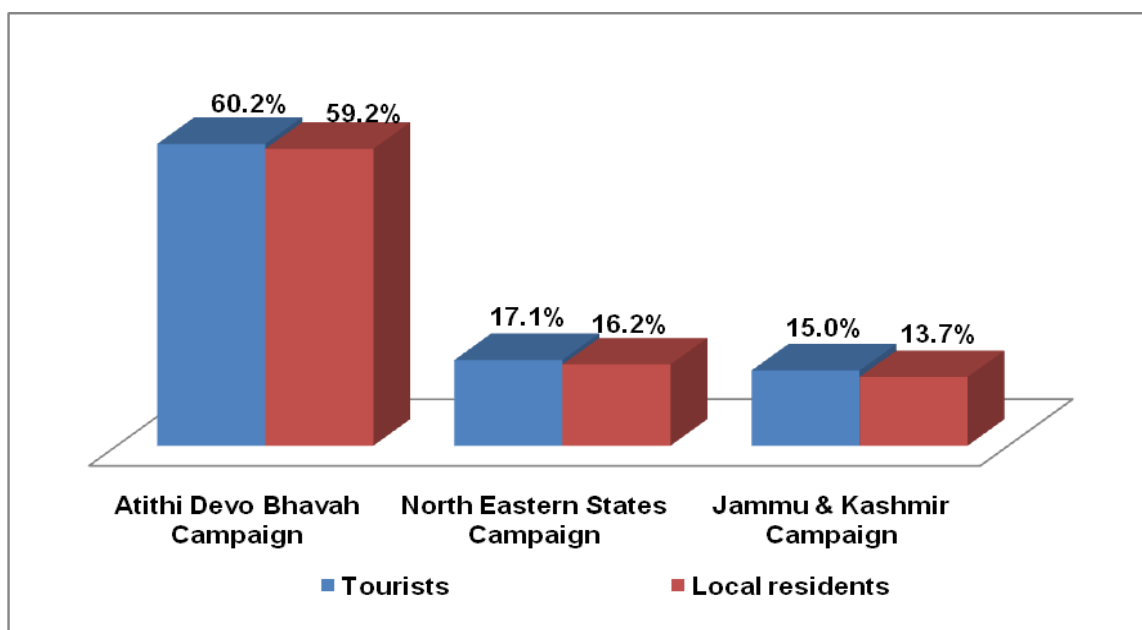


Table-4.1: Campaigns of Ministry of Tourism seen by the tourists and locals

Campaigns	Tourists		Locals	
	n	%	n	%
Atithi Devo Bhavah Campaign	9798	60.2	9693	59.2
North Eastern States Campaign	2785	17.1	2648	16.2
Jammu & Kashmir Campaign	2447	15.0	2247	13.7

When the hoteliers were asked about those promotion and publicity activities of Ministry of Tourism which they are aware of, 23.4% hoteliers informed that they are aware of *Atithi Devo Bhavah* campaign, 15% are aware of Clean India campaign, 11% are aware of Incredible India campaign, 7.3% hoteliers are aware of the campaign of Ministry of Tourism providing information of tourist places, while very few hoteliers were found to be aware of other promotion and publicity activities of Ministry of Tourism.

When the tour operators were asked about which promotion and publicity activities of Ministry of Tourism they are aware of, 37.6% tour operators informed that they are aware of *Atithi Devo Bhavah* campaign, 20.7% are aware of Clean India campaign, while very few tour operators were found to be aware of other promotion and publicity activities of Ministry of Tourism.

When the travel agents were asked about which promotion and publicity activities of Ministry of Tourism they are aware of, 43.9% travel agents informed that they are aware of *Atithi Devo Bhavah* campaign, 23.9% are aware of Clean India campaign; while very few travel agents were found to be aware of other promotion and publicity activities of Ministry of Tourism.

When the tour transport operators were asked about which promotion and publicity activities of Ministry of Tourism they are aware of, 36.1% tour transport operators informed that they are aware of *Atithi Devo Bhavah* campaign, 23.6% are aware of Clean India campaign, while very few travel agents were found to be aware of other promotion and publicity activities of Ministry of Tourism.

Overall, it was observed that significant percentage of hoteliers, tour operators, travel agents and tour transport operators are aware of *Atithi Devo Bhavah* campaign and Clean India campaign, while very few are aware of other promotion and publicity activities of Ministry of Tourism. Thus, necessary steps should be taken to create awareness among the stakeholders about the promotion and publicity activities of the Ministry for the promotion of tourism.

CHAPTER-V

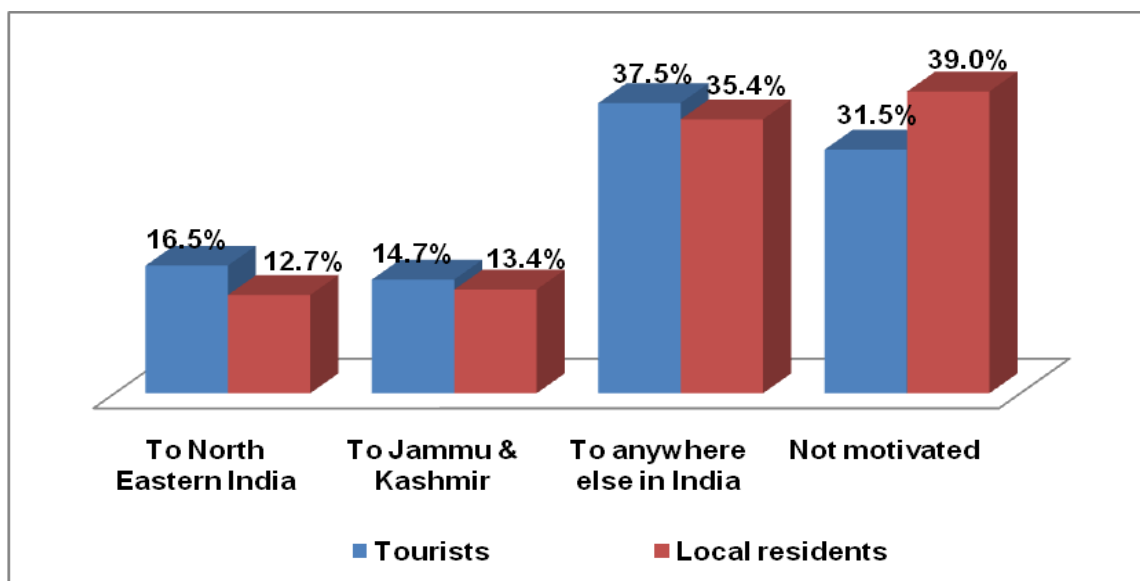
IMPACT OF PROMOTIONAL TV CAMPAIGNS & ATITHI DEVO BHAVAH CAMPAIGNS

Ministry of Tourism undertook various activities for promotion of domestic tourism and the spread of social awareness messages which include TV campaigns on Atithi Devo Bhavah, Clean India, North East campaign, Jammu & Kashmir campaign, etc. This chapter analyses the impact of promotional TV campaigns and Atithi Devo Bhavah campaigns undertaken by Ministry of Tourism.

5.1 Impact of promotional TV campaigns for a tourist travel



When the tourists and local residents were asked about the impact of the promotional TV campaigns of Ministry of Tourism, 19% tourists and 12.7% local residents informed that the campaigns have motivated them to undertake a tourist travel to North Eastern India, while 14.7% tourists and 13.4% local residents informed that the campaigns have motivated them to undertake a tourist travel to Jammu and Kashmir, and 37.5% tourists and 35.4% local residents informed that the campaigns have motivated them to undertake a tourist travel to anywhere else in India. Also, 31.5% tourists and 39% local residents reported that despite the campaigns they have not undertaken any travel for tourism.

Chart-5.1: Campaigns motivated the tourists and locals for a tourist travel**Table-5.1: Campaigns motivated the tourists and locals for a tourist travel**

Travel	Tourists		Locals	
	n	%	n	%
To North Eastern India	2694	16.5	2084	12.7
To Jammu & Kashmir	2390	14.7	2197	13.4
To anywhere else in India	6112	37.5	5796	35.4
Not motivated	5123	31.5	6377	39.0

5.2 Impact of promotional TV campaigns to consider future travel plans

Further, 12.9% tourists and 9.1% local residents informed that the campaigns have motivated them to plan travelling to North Eastern India, while 16.4% tourists and 13.2% local residents informed that the campaigns have motivated them to plan travel to Jammu and Kashmir, and 43.9% tourists and 45.1% local residents informed that the campaigns have motivated them to consider future travel to anywhere else in India. Also, 28.2% tourists and 32.9% local residents reported that the campaigns have not motivated them to consider the future travel plans. Again, it was observed that the tourists and local residents who were not motivated by the campaigns to consider the future travel plans, most of them have not seen the promotional TV campaigns of Ministry of Tourism.

Chart-5.2: Campaigns motivated the tourists and locals to consider the future travel plans

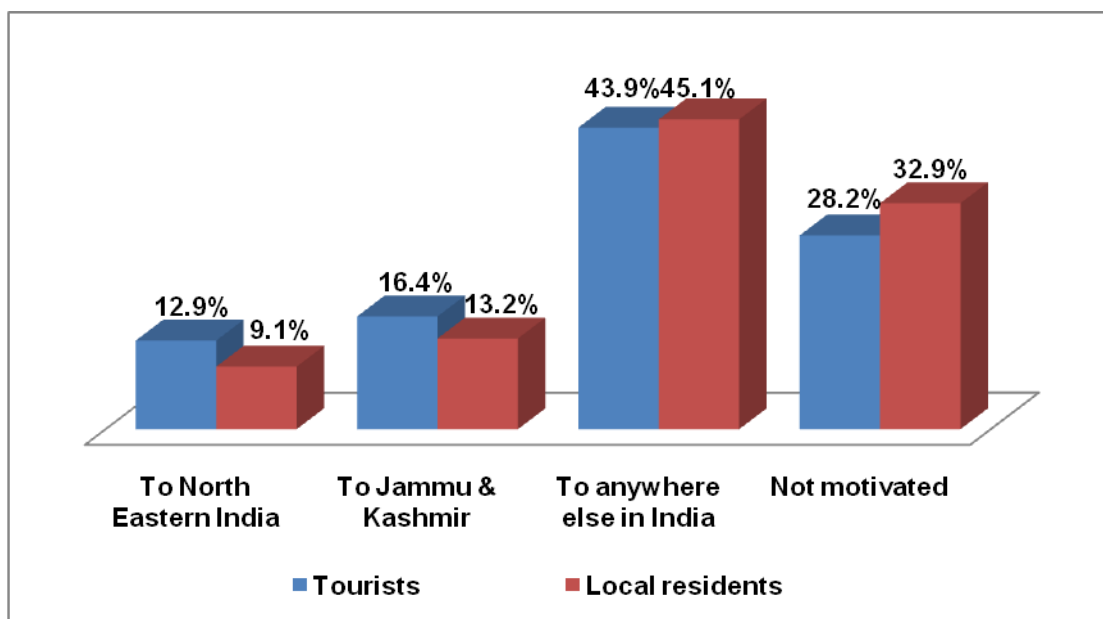


Table-5.2: Campaigns motivated the tourists and locals to consider the future travel plans

Travel	Tourists		Locals	
	n	%	n	%
To North Eastern India	2107	12.9	1486	9.1
To Jammu & Kashmir	2666	16.4	2166	13.2
To anywhere else in India	7155	43.9	7380	45.1
Not motivated	4589	28.2	5384	32.9

5.3 Impact of promotional TV campaigns on tourism

When the local residents were asked to provide their views on the benefits in their area due to promotional TV campaigns of Ministry of Tourism, majority (63.7%) of the local residents reported that the tourist arrivals in their area have increased, while 47.4% reported that the areas from which domestic tourists come have increased, 41.1% reported that the attitudes of locals have become positive, and 37.9% local residents informed that job opportunities have increased in their area due to promotional TV campaigns of Ministry of Tourism.

Chart-5.3: Views of the local residents on the benefits in their area due to promotional TV campaigns

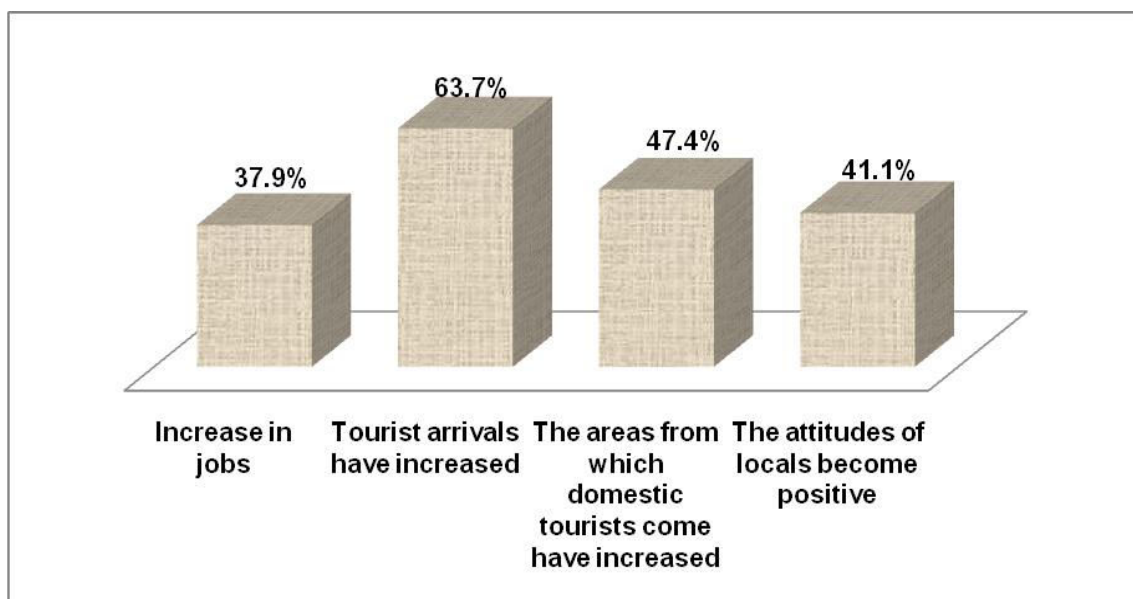


Table-5.3: Views of the local residents on the benefits in their area due to promotional TV campaigns

Benefits	n	%
Increase in jobs	6207	37.9
Tourist arrivals have increased	10423	63.7
The areas from which domestic tourists come have increased	7760	47.4
The attitudes of locals become positive	6722	41.1

5.4 Views of other stakeholders on improvement in different areas due to promotional TV campaigns

Views of hoteliers, tour operators, travel agents and tour transport operators were collected to observe improvement in attributes due to different promotional TV campaigns undertaken by Ministry of Tourism.

When the hoteliers, tour operators, travel agents and tour transport operators were asked whether there is any increment in importance of tourism due to different tourist campaigns of Ministry of Tourism, 48.4% hoteliers, 43.8% tour operators, 41.4% travel agents and 48.4% tour transport operators viewed that importance of tourism is

significantly increased; while 36.6% hoteliers, 31.6% tour operators, 39.8% travel agents and 31.5% viewed that importance of tourism is little increased; and 12.1% hoteliers, 19.5% tour operators, 14.8% travel agents and 17.3% tour transport operators viewed that the importance of tourism is not increased due to different publicity campaigns of Ministry of Tourism. Also, few hoteliers, tour operators, travel agents and tour transport operators informed that they did not know whether the importance of tourism is increased or not due to different publicity campaigns of Ministry of Tourism.

Regarding increment in tourist arrival due to different tourist campaigns, 48% hoteliers, 33.2% tour operators, 37.9% travel agents and 28% tour transport operators viewed that tourist arrival is significantly increased; while 38.1% hoteliers, 46.1% tour operators, 42.6% travel agents and 50.8% tour transport operators viewed that tourist arrival is little increased; 18.3% hoteliers, 19.1% tour operators, 16.4% travel agents and 19.3% tour transport operators viewed that increase in tourist arrival is not increased due to different publicity campaigns of Ministry of Tourism. Few hoteliers, tour operators, travel agents and tour transport operators informed that they did not know whether the tourist arrival is increased or not due to different publicity campaigns of Ministry of Tourism.

Regarding improvement in knowledge of tourist places due to promotion campaigns of the Ministry, 32.6% hoteliers, 41.8% tour operators, 39.8% travel agents and 41.3% tour transport operators viewed that knowledge on tourist places is significantly increased; while 45.8% hoteliers, 32.8% tour operators, 38.3% travel agents and 35.8% tour transport operators viewed that that knowledge on tourist places is little increased; 17.9% hoteliers, 23.8% tour operators, 16% travel agents and 21.3% tour transport operators viewed that the knowledge on tourist places is not increased due to different publicity campaigns of Ministry of Tourism. Few hoteliers, tour operators, travel agents and tour transport operators said that they did not know whether the knowledge of tourist places among the people is increased or not due to different campaigns of Ministry of Tourism.

About improvement in awareness on hospitality due to promotion campaigns, 24.9% hoteliers, 26.2% tour operators, 29.7% travel agents and 19.3% tour transport operators viewed that awareness on hospitality is significantly increased; while 38.5% hoteliers, 40.2% tour operators, 41.4% travel agents and 41.3% tour transport operators viewed that awareness on hospitality is little increased; 33% hoteliers, 28.1% tour operators,

25% travel agents and 36.6% tour transport operators viewed that awareness on hospitality is not increased due to different promotion campaigns of Ministry of Tourism. Few hoteliers, tour operators, travel agents and tour transport operators said that they did not know whether the awareness on hospitality is increased or not due to different promotion campaigns of Ministry of Tourism.

About improvement in income generation due to promotion campaigns, 27.1% hoteliers, 33.6% tour operators, 30.1% travel agents and 22.8% tour transport operators viewed that income generation is significantly increased; while 44.3% hoteliers, 37.5% tour operators, 44.5% travel agents and 42.5% tour transport operators viewed that income generation is little increased; 22% hoteliers, 24.6% tour operators, 22.3% travel agents and 31.5% tour transport operators viewed that income generation is not increased due to different promotion campaigns of Ministry of Tourism. Few hoteliers, tour operators, travel agents and tour transport operators did not say whether the income generation is increased or not due to different promotion campaigns of Ministry of Tourism.

On improvement in cleanliness of tourist places due to promotion campaigns, 41.4% hoteliers, 49.2% tour operators, 49.6% travel agents and 49.2% tour transport operators viewed that cleanliness of tourist places is significantly increased; while 37.7% hoteliers, 36.3% tour operators, 38.3% travel agents and 35.8% tour transport operators viewed that cleanliness of tourist places is little increased; 17.2% hoteliers, 12.1% tour operators, 10.5% travel agents and 13.4% tour transport operators viewed that cleanliness of tourist places is not increased due to different promotion campaigns of Ministry of Tourism. Few hoteliers, tour operators, travel agents and tour transport operators said that they did not know whether the cleanliness of tourist places is increased or not due to different promotion campaigns of Ministry of Tourism.

The study findings illustrate that majority of the hoteliers, tour operators, travel agents, tour transport operators feel that the importance of tourism, tourist arrival, knowledge of tourist places, awareness on hospitality, income generation and cleanliness of tourist places are somewhat increased due to promotion campaigns of Ministry of Tourism.

Table-5.4: Views of other stakeholders on improvement in different areas due to promotional TV campaigns

Attributes	Extent	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
		n	%	n	%	n	%	n	%
Importance of tourism	Significantly increased	132	48.4	112	43.8	106	41.4	123	48.4
	Little increased	100	36.6	81	31.6	102	39.8	80	31.5
	Not increased	33	12.1	50	19.5	38	14.8	44	17.3
	Cannot say	8	2.9	13	5.1	10	3.9	7	2.8
Tourist arrival	Significantly increased	112	48.0	85	33.2	97	37.9	71	28.0
	Little increased	104	38.1	118	46.1	109	42.6	129	50.8
	Not increased	50	18.3	49	19.1	42	16.4	49	19.3
	Cannot say	7	2.6	4	1.6	8	3.1	5	2.0
Knowledge of tourist place	Significantly increased	89	32.6	107	41.8	102	39.8	105	41.3
	Little increased	125	45.8	84	32.8	98	38.3	91	35.8
	Not increased	49	17.9	61	23.8	41	16.0	54	21.3
	Cannot say	10	3.7	4	1.6	15	5.9	4	1.6
Awareness on hospitality	Significantly increased	68	24.9	67	26.2	76	29.7	49	19.3
	Little increased	105	38.5	103	40.2	106	41.4	105	41.3
	Not increased	90	33.0	72	28.1	64	25.0	93	36.6
	Cannot say	10	3.7	14	5.5	10	3.9	7	2.8
Income	Significantly	74	27.1	86	33.6	77	30.1	58	22.8

generation	increased								
	Little increased	121	44.3	96	37.5	114	44.5	108	42.5
	Not increased	60	22.0	63	24.6	57	22.3	80	31.5
	Cannot say	18	6.6	11	4.3	8	3.1	8	3.1
Cleanliness of tourist places	Significantly increased	113	41.4	126	49.2	127	49.6	125	49.2
	Little increased	103	37.7	93	36.3	98	38.3	91	35.8
	Not increased	47	17.2	31	12.1	27	10.5	34	13.4
	Cannot say	10	3.7	6	2.3	4	1.6	4	1.6

5.5 Effectiveness of promotion and publicity activities of Ministry of Tourism

Majority of hoteliers, tour operators, travel agents and tour transport operators further stated that the promotion and publicity activities of Ministry of Tourism are somewhat effective, while more than one-third such respondents stated that the promotion and publicity activities of Ministry of Tourism are either non-effective or they are unaware.

Table-5.5: Opinion on effectiveness of promotion and publicity activities

Opinion	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
Very effective	53	19.4	52	20.3	36	14.1	66	26.0
Less effective	86	31.5	127	49.6	128	50.0	117	46.1
Not effective	46	16.8	30	11.7	40	15.6	30	11.8
Cannot say	88	32.3	47	18.4	52	20.3	41	16.1

5.6 Impact of Atithi Devo Bhavah campaign



In 2008, the Ministry of Tourism launched a campaign targeted at the local population to educate them regarding good behaviour and etiquette when dealing with tourists. Atithi Devo Bhavah campaign aimed at creating awareness about the effects of tourism and sensitising the local population about preservation of India's heritage, culture, cleanliness and hospitality. It also attempted to re-instil a sense of responsibility towards tourists and reinforce the confidence of foreign tourists towards India as a preferred holiday destination. The concept was designed to complement the 'Incredible India' Campaign.

However, when the local residents were asked whether Atithi Devo Bhavah campaign of Ministry of Tourism has changed their attitude towards tourists, 36.3% local residents informed that their attitude has been changed towards the tourists due to the Atithi Devo Bhavah campaign, while majority (63.7%) of the local residents informed that their attitude has not changed towards tourists due to Atithi Devo Bhavah campaign.

Chart-5.4: Atithi Devo Bhavah campaign changed the attitude of local residents

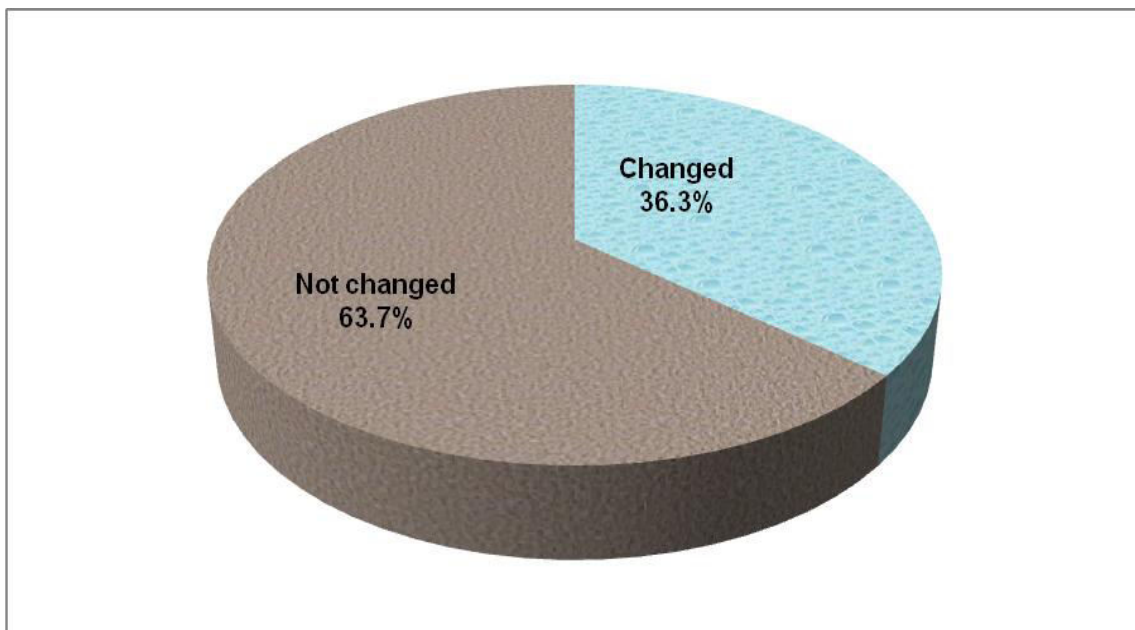


Table-5.6: Atithi Devo Bhavah campaign changed the attitude of local residents

Options	n	%
Changed	5946	36.3
Not changed	10421	63.7

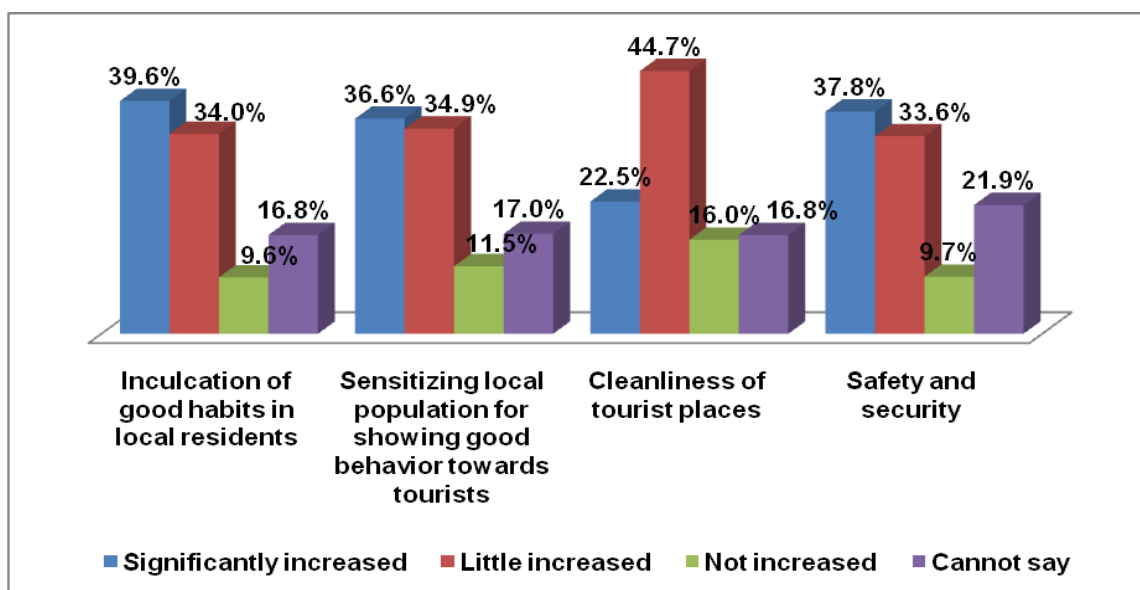
Of the local residents, who reported that Atithi Devo Bhavah campaign has changed their attitude, 39.4% of them further said that the campaign has changed their attitude to help, care and provide safety to the tourists, while 19.1% of them said that it has changed their attitude to keep good relation with the tourists. Also, 17.2% of them said that the campaign has changed their attitude in showing good behaviour to the tourists, and 8.3% of them said that it has changed their attitude in providing a free and fearless journey to the tourists.

During the study, views of local residents were collected on improvement in attributes due to Atithi Devo Bhavah campaign. On inculcation of good habits in local residents, 39.6% local residents viewed that it is significantly increased, while 34% viewed that it is little increased, 9.6% viewed that it is not at all increased, and 16.8% could not tell whether there is any improvement in good habits in local residents due to Atithi Devo Bhavah campaign. In sensitizing local population for showing good behaviour towards tourists, 36.6% local residents viewed that it is significantly increased, while 34.9% viewed that it is little increased, 11.5% viewed that it is not at all increased, and 17% could not tell whether there is any improvement in sensitizing local population for showing good behaviour towards tourists due to Atithi Devo Bhavah campaign. On cleanliness of tourist places, 22.5% local residents viewed that it is significantly increased, while 44.7% viewed that it is little increased, 16% viewed that it is not at all increased, and 16.8% could not tell whether there is any improvement in cleanliness of tourist places due to Atithi Devo Bhavah campaign. On safety and security of the tourists, 37.8% local residents viewed that it is significantly increased, while 33.6% viewed that it is little increased, 9.7% viewed that it is not at all increased, and 21.9% could not tell whether there is any improvement in safety and security of tourists due to Atithi Devo Bhavah campaign.

Table-5.7: Views of the local residents in the improvement in attributes due to Atithi Devo Bhavah campaign

Attributes	Significantly increased		Little increased		Not increased		Cannot say	
	n	%	n	%	n	%	n	%
Inculcation of good habits in local residents	6476	39.6	5564	34.0	1575	9.6	2752	16.8
Sensitizing local population for showing good behaviour towards tourists	5989	36.6	5716	34.9	1887	11.5	2775	17.0
Cleanliness of tourist places	3687	22.5	7310	44.7	2618	16.0	2752	16.8
Safety and security	5696	37.8	5498	33.6	1585	9.7	3588	21.9

Chart-5.5: Views of the local residents in the improvement in attributes due to Atithi Devo Bhavah campaign



5.7 Views of other stakeholders on improvement in the different attributes due to Atithi Devo Bhavah campaign

Then the study intended to collect views of the hoteliers, tour operators, travel agents and tour transport operators on the improvement in the attributes due to Atithi Devo Bhavah campaign of the Ministry.

When the hoteliers, tour operators, travel agents and tour transport operators were asked whether there is any improvement in inculcating good habits in local residents due to Atithi Devo Bhavah campaign of Ministry of Tourism, 44.7% hoteliers, 42.6% tour operators, 41.4% travel agents and 51.6% tour transport operators viewed that inculcation of good habits is significantly increased in local residents; while 38.8% hoteliers, 45.7% tour operators, 43.8% travel agents and 34.6% tour transport operators viewed that inculcation of good habits is little bit increased in local resident; and 10.3% hoteliers, 8.2% tour operators, 11.3% travel agents and 12.2% tour transport operators viewed that inculcation of good habits is not at all increased in local residents due to Atithi Devo Bhavah campaign of Ministry of Tourism. Few hoteliers, tour operators, travel agents and tour transport operators informed that they did not know whether the inculcation of good habits in local residents has increased or not due to Atithi Devo Bhavah campaign of Ministry of Tourism.

On improvement in local population's sensitivity for showing good behaviour towards tourists, 49.1% hoteliers, 46.5% tour operators, 48.8% travel agents and 50% tour transport operators viewed that local population's sensitivity for showing good behaviour towards tourists is significantly increased; while 33% hoteliers, 31.2% tour operators, 31.2% travel agents and 28.3% tour transport operators viewed that local population's sensitivity for showing good behaviour towards tourists is little bit increased; and 14.3% hoteliers, 19.5% tour operators, 16.4% travel agents and 18.9% tour transport operators viewed that local population's sensitivity for showing good behaviour towards tourists is not at all increased due to Atithi Devo Bhavah campaign of Ministry of Tourism. Few hoteliers, tour operators, travel agents and tour transport operators informed that they did not know whether local population's sensitivity for showing good behaviour towards tourists is increased or not due to Atithi Devo Bhavah campaign of Ministry of Tourism.

On improvement in cleanliness of tourist places, 46.2% hoteliers, 45.7% tour operators, 44.9% travel agents and 42.9% tour transport operators viewed that cleanliness of tourist places is significantly improved; while 35.9% hoteliers, 41% tour operators, 40.6% travel agents and 39.8% tour transport operators viewed that cleanliness of tourist places is little bit improved; and 14.3% hoteliers, 10.2% tour operators, 10.2% travel agents and 14.2% tour transport operators viewed that cleanliness of tourist places is not at all improved due to Atithi Devo Bhavah campaign of Ministry of Tourism. Few hoteliers, tour operators, travel agents and tour transport operators could

not say anything when we asked them whether cleanliness of tourist places is improved due to Atithi Devo Bhavah campaign of Ministry of Tourism.

Table-5.8: Views on improvement in the attributes due to Atithi Devo Bhavah campaign

Attributes	Extent	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
		n	%	n	%	n	%	n	%
Inculcation of good habits in local residents	Significantly increased	122	44.7	109	42.6	106	41.4	131	51.6
	Little increased	106	38.8	117	45.7	112	43.8	88	34.6
	Not increased	28	10.3	21	8.2	29	11.3	31	12.2
	Cannot say	17	6.2	9	3.5	9	3.5	4	1.6
Sensitizing local population for showing good behaviour towards tourists	Significantly increased	134	49.1	119	46.5	125	48.8	127	50.0
	Little increased	90	33.0	80	31.2	80	31.2	72	28.3
	Not increased	39	14.3	50	19.5	42	16.4	48	18.9
	Cannot say	10	3.7	7	2.7	9	3.5	7	2.8
Cleanliness of tourist places	Significantly increased	126	46.2	117	45.7	115	44.9	109	42.9
	Little increased	98	35.9	105	41.0	104	40.6	101	39.8
	Not increased	39	14.3	26	10.2	26	10.2	36	14.2
	Cannot say	10	3.7	8	3.1	11	4.3	8	3.1
Safety and security	Significantly increased	121	44.3	120	46.9	133	52.0	125	49.2
	Little increased	96	35.2	86	33.6	66	25.8	63	24.8
	Not increased	32	11.7	33	12.9	33	12.9	51	20.1

	increased								
	Cannot say	24	8.8	17	6.6	24	9.4	15	5.9

Overall, it was observed that Atithi Devo Bhavah campaign has somewhat helped in improving good habits in local residents, sensitizing local population for showing good behaviour towards tourists, cleanliness of tourist places and safety & security of the tourists.

5.8 Opinion on more promotional campaigns

About one-quarter tourists (23.1%) and local residents (27.8%) suggested that the Ministry of Tourism should take up more promotional TV campaigns in addition to North Eastern States campaign and Jammu & Kashmir campaign, while majority of the tourists (76.9%) and local residents (72.2%) suggested that the Ministry of Tourism should not take up more promotional TV campaigns in addition to North Eastern States campaign and Jammu & Kashmir campaign.

Chart-5.6: Suggestion for taking up more promotional campaigns in addition to NE States Campaign and J&K Campaign

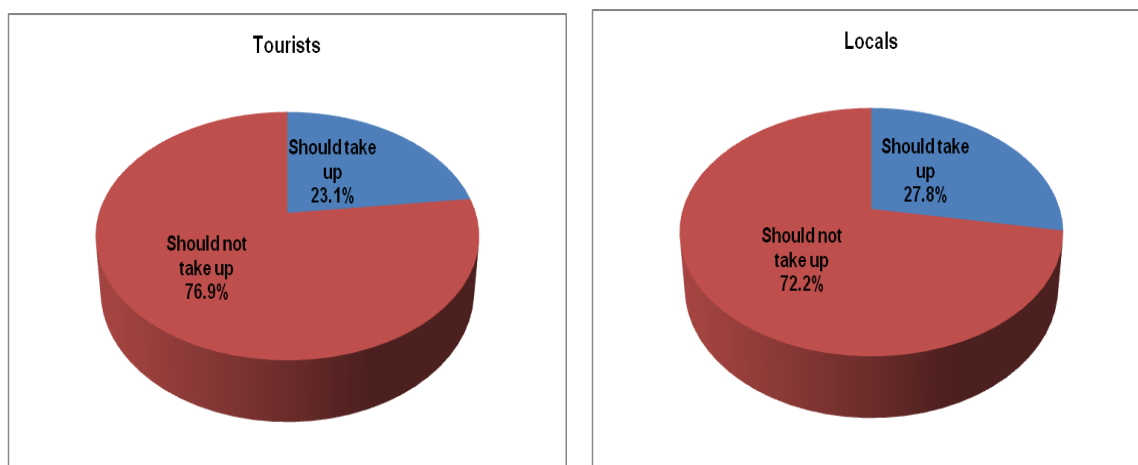


Table-5.9: Suggestion for taking up more promotional campaigns in addition to NE States Campaign and J&K Campaign

Options	Tourists		Locals	
	n	%	n	%
Yes	3764	23.1	4551	27.8
No	12517	76.9	11816	72.2

The tourists who suggested that Ministry of Tourism should take up more promotional campaigns in addition to NE States Campaign and J&K Campaign, 35.5% of them suggested for more promotional campaigns to create more awareness among people about tourism, while 28.9% of them suggested for more promotional campaigns to motivate the people for the promotion of tourism, 11.1% of them suggested for more promotional campaigns to increase income from tourism, 7% of them suggested to promote historical heritage, monuments and religious sites and 4% of them suggested for more promotional campaigns for the promotion of unknown tourist places.

The local residents who suggested that Ministry of Tourism should take up more promotional campaigns in addition to NE States Campaign and J&K Campaign, 54% of them suggested for more promotional campaigns to provide information and create awareness on good tourist places, while 51.4% of them suggested for more promotional campaigns to provide information on the tourist places of southern states, and 9.1% of them suggested for more promotional campaigns for sensitizing people on different Indian culture, heritage and hospitality.

5.9 Promotion and publicity activities which can be added

51% hoteliers opined that the Ministry should take up more publicity campaigns in Internet/TV/Newspaper for promotion of tourism in India, while 15% hoteliers opined that the Ministry should take up more publicity campaigns in social media/mobile app.

55.8% tour operators, 62.7% travel agents and 61.9% tour transport operators opined that the Ministry should take up more publicity campaigns in Internet/TV/Newspaper for promotion of tourism in India; while 15.6% tour operators, 9.8% travel agents and 13.7% tour transport operators suggested that the Ministry should motivate the stakeholders for the promotion of tourism.

Thus, according to the opinion of different stakeholders, Ministry should take up more publicity campaigns in Internet/TV/Newspaper; it should motivate the stakeholders, and should take up more publicity campaigns in social media/mobile app for the promotion of tourism.

CHAPTER-VI

PREFERENCES OF TOURISTS AND LOCAL RESIDENTS

6.1 Preferred sources of information of tourists and local residents

The study observed that TV is the most preferred source of information for the tourists and local residents. Majority of the tourists (68.5%) and local residents (68.1%) informed that TV is their preferred source of information.

After TV, 43.2% tourists prefer internet as the source of information, while 39% prefer newspaper, 15.1% prefer magazine, 15.1% prefer radio, 12.8% prefer social media, 6.4% prefer mobile apps and 2.7% tourists prefer other source as their source of information.

In case of local residents, 43.9% prefer newspaper, 37.7% prefer internet, 18.8% prefer radio, 17.5% prefer magazine, 12.1% prefer social media, 4% prefer mobile apps and 1.6% local residents prefer other source as their source of information.

Chart-6.1: Preferred sources of information of tourists and local residents

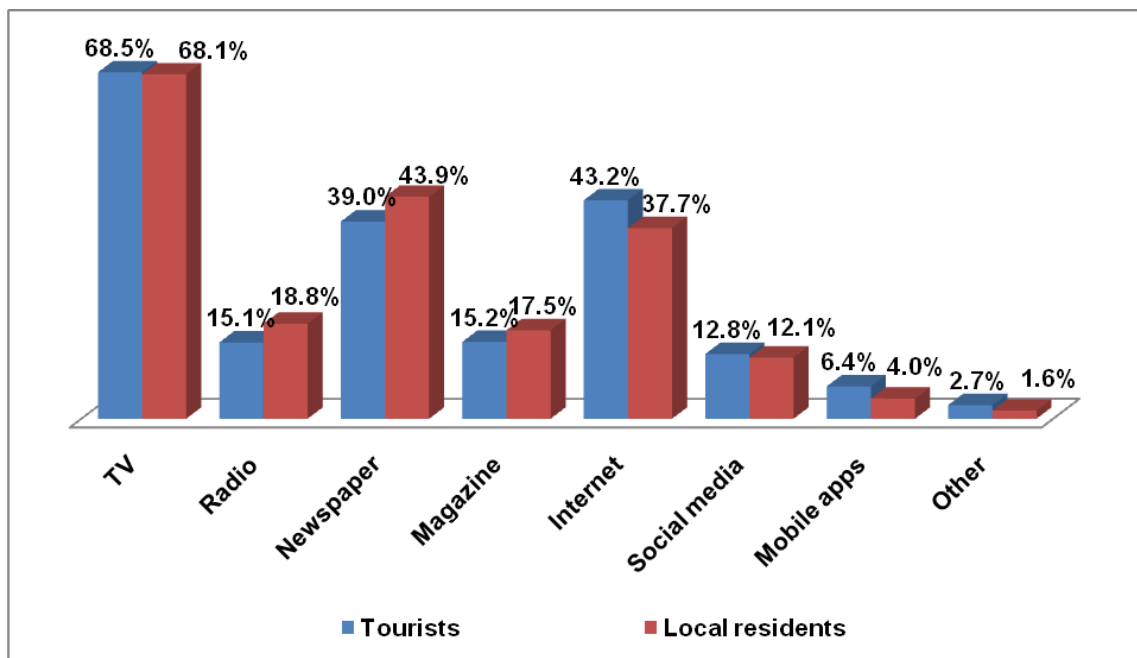


Table-6.1: Preferred sources of information of tourists and local residents

Media	Tourists		Locals	
	n	%	n	%
TV	11158	68.5	11139	68.1
Radio	2463	15.1	3072	18.8
Newspaper	6346	39.0	7191	43.9
Magazine	2477	15.2	2863	17.5
Internet	7038	43.2	6175	37.7
Social media	2076	12.8	1988	12.1
Mobile apps	1047	6.4	652	4.0
Other	436	2.7	267	1.6

6.2 Best media for tourism advertisement

According to tourists and local residents, TV is the best media for tourism advertisement. 45.8% tourists and 49.8% local residents opined that TV is the best media for tourism advertisement.

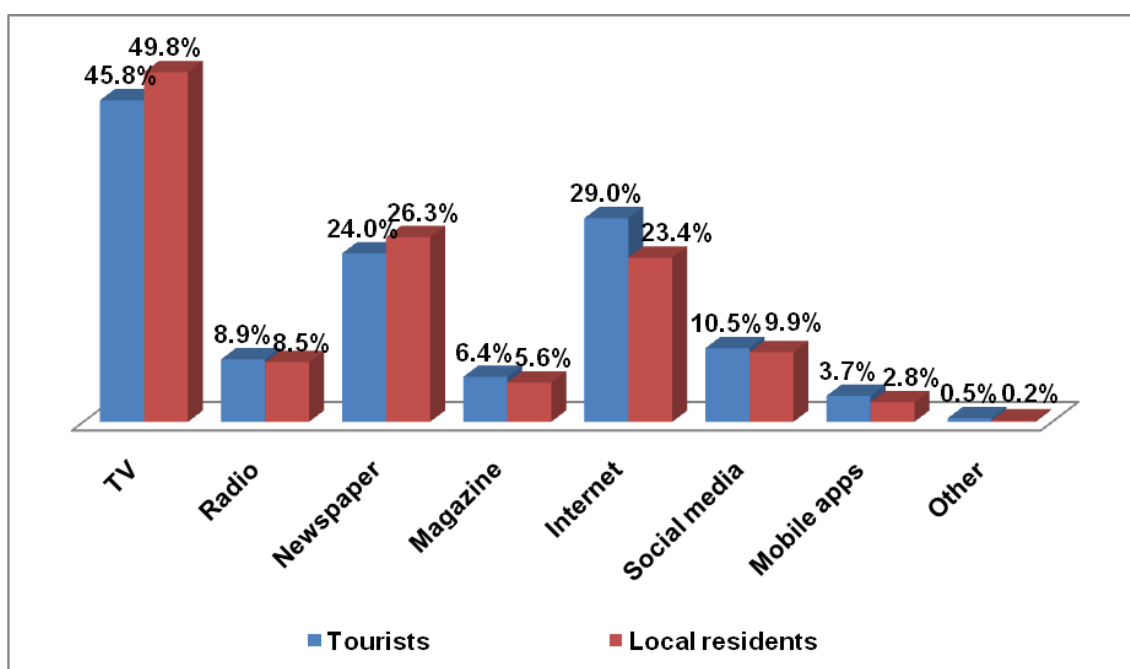
After TV, 29% tourists opined internet as best media for tourism advertisement, while 24% opined for newspaper, 10.5% opined for social media, 8.9% opined for radio, 6.4% opined for magazine, 3.7% opined for mobile apps and 0.5% tourists opined for other source for tourism advertisement.

In case of local residents, 26.3% opined that newspaper was the best media for tourism advertisement, while 23.4% opined for internet, 9.9% opined for social media, 8.5% opined for radio, 5.6% opined for magazine, 2.8% opined for mobile apps and 0.2% local residents opined for other source for tourism advertisement.

Table-6.2: Best media for tourism advertisement
(Opinion of tourists and local residents)

Media	Tourists		Locals	
	n	%	n	%
TV	7462	45.8	8148	49.8
Radio	1441	8.9	1388	8.5
Newspaper	3910	24.0	4303	26.3
Magazine	1044	6.4	912	5.6
Internet	4720	29.0	3824	23.4
Social media	1716	10.5	1627	9.9
Mobile apps	596	3.7	459	2.8
Other	74	0.5	35	0.2

Chart-6.2: Best media for tourism advertisement
(Opinion of tourists and local residents)



6.2 Type of information tourists and locals want from the campaigns

When tourists and locals were asked what type of information they would like to have from the campaigns of Ministry of Tourism, 33.7% tourists and 36.6% local residents said that they want information on the tourism resources of the country, while 33.4% tourists and 35.9% local residents want information on tourist places, 29.7% tourists

and 36.6% local residents want information on initiatives of Ministry of Tourism, 28.6% tourists and 29.9% local residents want information on tourism projects of Ministry of Tourism, 26% tourists and 26.5% local residents want information on tourism events/fairs and festivals, and very few tourists and local residents said that they want other information from the campaigns of Ministry of Tourism.

Chart-6.3: Type of information tourists and local residents would like to know from the campaigns of Ministry of Tourism

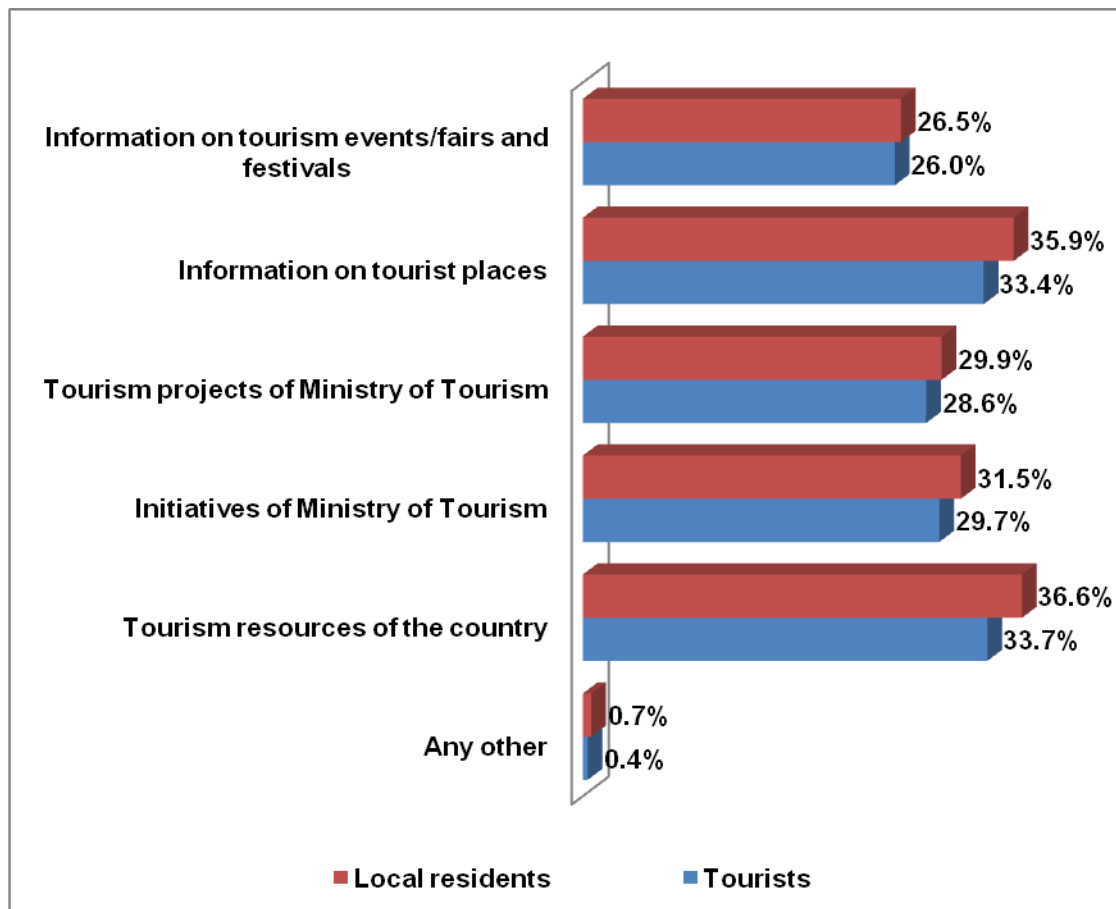


Table-6.3: Type of information tourists and local residents would like to receive from the campaigns of Ministry of Tourism

Type of information	Tourists		Locals	
	n	%	n	%
Tourism resources of the country	5492	33.7	5993	36.6
Initiatives of Ministry of Tourism	4830	29.7	5152	31.5
Tourism projects of Ministry of Tourism	4654	28.6	4896	29.9
Information on tourist places	5442	33.4	5874	35.9
Information on tourism events/fairs and festivals	4235	26.0	4341	26.5
Any other	67	0.4	117	0.7

The above findings suggest that Television remains the most preferred source of information for the tourists and local residents. More than two thirds of tourists and local residents mentioned Television as the most preferred media. However, internet is fast catching up as a source. The Ministry has to gradually increase its attention and allocation for campaigning through internet, search engines, websites, social media platforms, travel and tourism portals and blogs.

The print media comprising Newspaper and Magazines is gradually becoming less preferred by the individuals. However, these retain their popularity among organisations like business units in travel, tourism and hospitality trade as well as industry associations. Therefore, the kind of campaigns to be allocated to different media should also undergo a change according to the category of audience that prefers it.

CHAPTER-VII

IMPACT OF SUPPORTING EVENTS

7.1 Impact of Supporting Events by MOT on domestic tourism and in creating awareness about tourism destination within the country

In addition to the core events addressed specifically towards boosting tourist traffic to specific destination, assistance is also provided for participating in supporting events. These are meant to not only motivate the staff deployed at the state level towards engaging with prospective and current tourists but also to create a better tourism experience for the tourists. Our study discovered that the funds disbursed by the Ministry of Tourism are utilized for the following supporting events:

i) Clean India Campaign (Swachh Bharat Abhiyan)

This was taken up in right earnest by many of the India Tourism offices as well as by State Tourism Departments. Primary focus was on cleaning up the tourist places by involving the tourism personnel as well as the tourists voluntarily. Our interviews with stakeholders suggest that this activity improved the engagement of the tourists with the respective tourist site. In addition to that, the wide coverage of such an event in the media proved to be motivating for the stakeholders. The intention should be to convert it into a movement so that the tourist experience is permanently improved.

ii) Celebration of World Tourism Day and National Tourism Day

A range of events are organized to involve the stakeholders including the current and prospective tourists for the said celebration. The anecdotal evidence suggests that these have proved to be effective in generating the buzz around the local tourist attractions.

iii) Commemoration of Raj Bhasha Divas

The commemoration of certain days to promoting Hindi is also done under the support of Ministry of tourism in many of the states.

iv) Supporting events organized in local hospitality institutes

In some of the cases, the local training institutes under Tourism and Hospitality were supported in their events from the funds received from Ministry of Tourism. The interviews suggest that this has been effective.

v) Travel expenses of local officials for attending tourism related meetings and events at local level

Officials of The local domestic tourism offices have to attend meetings and events at local level in order to promote domestic tourism in their area. However, there is no provision elsewhere for supporting this necessary intervention. Therefore, the travel expenses of the state level officials are met through the DPP scheme. It may appear to be a minor amount but at the local level it means a lot to the officials since otherwise they would not be able to network with trade partners and state government officials or make small purchases during the events and meetings.

The interaction pertaining to the support events suggested that if the objectives of the support events proposed by local offices is in alignment with the objectives of the DPP, assistance should not only be offered but allocation under this head must be increased.

7.2 Impact of supporting the events on brand name of 'Incredible India'

Among the responses to the survey of India Tourism offices, there were five types of events/activities which were stated as having been supported by MOT funds. These have been described above in the previous section. The activities wherein 'Incredible India' branding was used prominently are as follows:

- i) Clean India Campaign (Swachh Bharat Abhiyan)
- ii) Celebration of World Tourism Day and National Tourism Day

The interviews of India Tourism office personnel and the photographs of these public events organized by India Tourism offices suggest that wherever, such events were organized by India Tourism office personnel, the high prominence accorded to 'Incredible India' branding is likely to have resulted in awareness and positive image of 'Incredible India' brand. Wherever the offices used the funding for remaining three activities, the 'Incredible India' branding did not benefit.

There were seven respondent offices who mentioned engaging in first two activities and other offices utilized funding only for activities (iii) to (v).

CHAPTER-VIII

IMPACT OF CFA SUPPORT FOR TOURISM EVENTS/ FAIRS AND FESTIVALS

It is often said that India is a land of fair and festivals. Even without the intervention of formal tourism promotion institutions, the fairs and festivals are a major reason for undertaking tourism in India. The same holds true for the fair and festivals that are being supported by state tourism departments and the Ministry of Tourism at the central level. In other words, Fairs and Festivals are an important component of the Tourism calendar in India. Ministry of tourism, under the DPP scheme, extends assistance to state tourism departments to organise and publicise fairs and festivals in their respective state.

8.1 Fair / festival motivated for a tourist visit

40.8% tourists and 38.5% local residents reported that fair / festival has motivated them for a tourist visit within India, while majority of the tourists (59.2%) and local residents (61.5%) reported that fair / festival has not motivated them for a tourist visit within India.

Chart-8.1: Any fair / festival motivated the tourists and local residents for a tourist visit within India

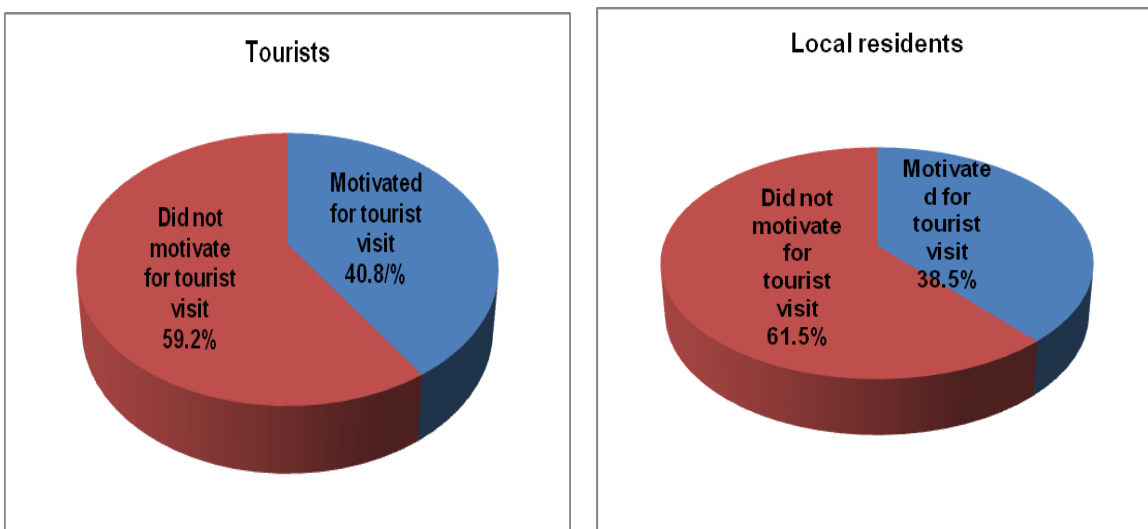


Table-8.1: Any fair / festival motivated the tourists and locals for a tourist visit within India

Options	Tourists		Locals	
	n	%	n	%
Motivated for tourist visit	6640	40.8	6305	38.5
Did not motivate for tourist visit	9641	59.2	10062	61.5

8.2 Major fairs and festivals which have motivated tourists to undertake a visit

According to the opinion of tourists and local residents, it was observed that Kumbh mela, Dussehra, Puri Rath Yatra, handicraft fairs, Brahmotsavam, Vallamkali, Holi in Mathura, Ganesh festival, Onam, and Indian dance festivals are the major fairs and festivals which have motivated the tourists and local residents to undertake a tourist visit within India.

Further, the study observed that Puri Rath Yatra, Dussehra in Mysore, Kumbh mela, Holi in Mathura, Diwali, Boat race in Kerala, Ganesh festival in Mumbai, Vallamkali, flower show/ fair, Indian dance festival, and trade/ handicraft fair are the major fairs and festivals which can motivate the tourists and local residents to undertake a tourist visit within India.

Table-8.2: Major fairs and festivals which motivated the tourists and locals for a tourist visit within India

Major fairs and festivals		n	%
Opinion of tourists	Kumbh mela	490	7.4
	Dussehra	455	6.9
	Puri Rath Yatra	444	6.7
	Handicraft fair	263	4.0
	Brahmotsavam	232	4.5
	Holi in Mathura	211	3.2
	Indian Dance Festival	189	2.8
Opinion of locals	Dussehra	451	7.2
	Vallamkali	247	4.0
	Puri Rath Yatra	235	3.7
	Ganesh festival	220	3.5

	Kumbh mela	155	2.5
	Indian Dance Festival	149	2.4
	Onam	101	1.6

Table-8.3: Major fairs and festivals which can motivate the tourists and local residents for a tourist visit within India

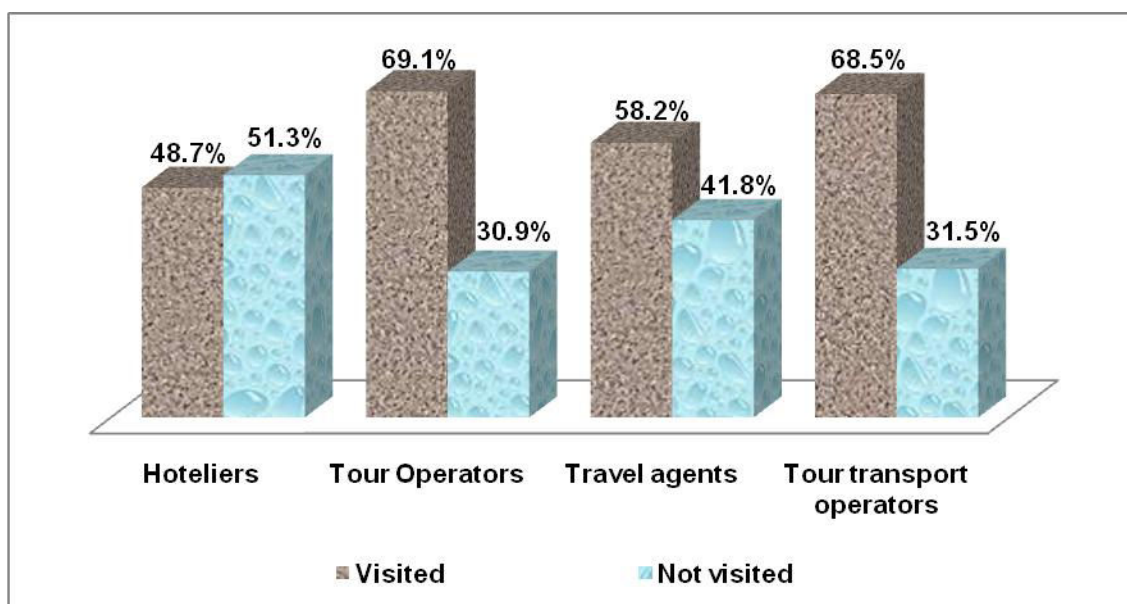
Major fairs and festivals		n	%
Opinion of tourists	Puri Rath Yatra	610	3.8
	Dussehra in Mysore	493	3.0
	Kumbh mela	344	2.1
	Flower show/ fair	316	1.9
	Holi in Mathura	279	1.7
	Diwali	270	1.7
	Boat race in Kerala	227	1.4
	Ganesh festival in Mumbai	227	1.4
	Handicraft fair	191	1.2
Opinion of locals	Dussehra	552	3.4
	Holi in Mathura	213	1.3
	Ganesh festival	205	1.3
	Boat race in Kerala	177	1.1
	Diwali	177	1.1
	Vallamkali	160	1.0
	Puri Rath Yatra	159	1.0
	Indian Dance Festival	154	0.9
	Kumbh mela	139	0.8
	Trade/ Handicraft Fair	117	0.7

8.2 Visit to domestic tourism events/fairs and festivals by service providers

While majority (51%) of the hoteliers reported that they visit domestic tourism events/fairs and festivals, majority of the tour operators (69.1%), travel agents (41.8%) and tour transport operators (68.5%) reported that they do not visit domestic tourism events/fairs and festivals.

Table-8.4: Stakeholders visited domestic tourism events/fairs and festivals

Options	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
Visited	133	48.7	177	69.1	149	58.2	174	68.5
Not visited	140	51.3	79	30.9	107	41.8	80	31.5

Chart-8.2: Stakeholders visited domestic tourism events/fairs and festivals

The hoteliers, tour operators, travel agents, tour transport operators who visit the fairs and festivals, were further asked which fairs and festivals they like more. In response, it was observed that traditional festivals preferred the most, followed by trade fairs, dance festivals, handicraft fairs and convention of tourism association.

Table-8.5: Preferred fairs and festivals

Options	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
Trade fair	28	21.1	83	46.9	65	43.6	47	27.0
Dance festival	31	23.3	51	28.8	35	23.5	38	21.8
Handicraft fair	30	22.6	50	28.2	47	31.5	51	29.3
Traditional festival	56	42.1	63	35.6	39	26.2	77	44.3

Religious festival	29	21.8	37	20.9	25	16.8	37	21.3
Convention of tourism association	17	12.8	33	18.6	18	12.1	15	8.6
Other	1	0.8	4	2.3	4	2.7	-	-

8.3 Impact assessment of the state government fairs and festivals projects supported by Ministry of Tourism under DPP scheme

Ministry of Tourism has supported 357 fairs and festivals organized by different State Governments since 2007-08. As per the sampling norms specified in the TOR, 18 such projects were identified for evaluation. The sampling plan for the selection of projects is given in the following table.

Table- 8.6: Number of fairs and festivals supported by MOT under DPP scheme from 2007-08 to 2014-15

Financial Year	Fairs and Festivals for which assistance was extended by MOT (No.)	Sampled Fairs and Festivals for which assistance was extended by MOT (No.)
2007-08	51	3
2008-09	55	3
2009-10	51	2
2010-11	65	3
2011-12	56	3
2012-13	33	2
2013-14	28	1
2014-15	18	1
Total	357	18

Once the year wise sample size was determined, the specific fairs and festivals were selected on a year wise basis for conducting interviews with the state governments. Such projects were identified in such a manner that even though chosen on a judgmental basis, these represent a wide range of fairs and festivals in a range of states. Also, from among the amount disbursed, the amount of assistance provided by MOT to sampled projects was relatively more substantial than the ones left out of the

sample. The specifics of the sampled projects for each year are presented in the following table.

Table-8.7: List of 18 fairs/festivals selected for evaluation under category “Promotional activities undertaken in collaboration in States & UTs”

Sl. No.	Year	Fairs and Festival Details
1	2007-08	Delhi Garden Tourism Festival - Feb 2008
2	2007-08	U.P.-Taj Mahotsav, Agra - Feb 2008
3	2007-08	Manipur Tourism Festival - 2007-08
4	2008-09	Karnataka- Bengaluru Habba - Dec. 2008
5	2008-09	Delhi Mango Festival - July 2008
6	2008-09	Maharashtra – Saptrang 2009 – Mumbai
7	2009-10	West Bengal Tourism and Food Festival 2010 - Jan. 2010
8	2009-10	MP-Organizing Lok Rang silver jubilee year 2010, Bhopal
9	2010-11	Rajasthan-Deepotsav 2010 during Commonwealth Games, Jaipur
10	2010-11	Goa- International Trade Mart - Oct 2010
11	2010-11	Elephanta festival 2011-Mumbai
12	2011-12	Manipur- Winter Festival on the Quest, Imphal
13	2011-12	Odisha- All India Paika Akhada, Bhubaneshwar - Apr 2011
14	2011-12	Maharashtra- Celebration of Elephanta Festival 2012, Mumbai
15	2012-13	Goa- Carnival and Shigmo Festival 2012
16	2012-13	Odisha- Konark Festival
17	2013-14	UP- Celebration of Ganga Mahotsav Varanasi 2013
18	2014-15	West Bengal- Sharadotsav 2014

The officials of the respective state tourism departments were contacted to recall and respond to the queries related to the respective project from their state that was included in the sample. To the extent possible, the appropriate officials who were involved with the particular fairs/ festivals as well as the Director (Tourism) of the state and similarly senior officials were contacted during the study. The findings of the impact assessment exercise of this component are as follows:

1. The recall of the projects older than five years i.e. before 2011-12 was faint and therefore, despite the relevant file and documents of that period being referred, the responses pertaining to projects older than five years was inadequate. In some cases, the appropriate officer in charge of the said project is no longer available with the office due to transfer, their retirement in the intervening years etc. So, recall in some of the projects presented a challenge. There were 11 projects out of 18 in the sample which pertain to period before 2011-12. Out of this, recall of the impact was found to be challenging in three festivals. Manipur Tourism Festival - 2007-08, Maharashtra Saptarang 2009, MP- Organising Lok Rang Silver Jubilee year 2009-10.
2. The responses related to all the 18 projects by the respondents suggest that in terms of the impact of increasing domestic tourists, generating awareness and increasing tourist spend, the said projects are perceived to have had a significantly positive impact.
3. When the respondents were asked about the credit for success of the programme, all the respondents credited their own department and state government and sometimes the concerned minister of tourism for the success of the programme. The acknowledgment of MOT's role was absent while revisiting the project. The follow up questions asked by the study team revealed the reasons of such a response.
4. The funding assistance provided by MOT forms a very small percentage (In most of the sampled projects it was between 4-10%) of the total budget of the fair/festival as reported by the respondents and as seen from the records wherever this was made available. The small share of MOT in funding the fair/festival led to a perception for MOT not contributing anything towards it.
5. The total time taken by the Ministry of Tourism to process the application from proposal submission stage to the stage of funds disbursement is perceived by the state tourism departments to be too much. The communication from Ministry is perceived to be sporadic and sketchy by beneficiary department.
6. Almost all the receiving state tourism departments articulated that the procedure for obtaining assistance as part of DPP scheme is very cumbersome and multiple visits have to be made to the Ministry's office. In addition, the

compliance related documents have to be submitted many times. This was considered very annoying and costly by many of the respondents.

There is a need to support fairs and festivals with timely and easy processes and adequate amounts. In addition to that the metrics must be evolved for measuring success and failures of the fairs and festivals so that easier prioritisation can take place.

CHAPTER-IX

IMPACT OF PARTICIPATION OF INDIA TOURISM IN THE MAJOR TRAVEL FAIRS (SATTE/KTM/TTF/GITB/ITM/ANY OTHER TRAVEL FAIRS)

As part of the efforts to promote domestic tourism, the Ministry of Tourism has a provision for not only fostering participation of different trade partners in the travel and tourism fairs but also participate themselves in such events. Such participation is a great opportunity for networking and motivating those involved in the trade. It also serves as an interface with the tourists segment.

9.1 Awareness on participation of Ministry of Tourism in events/fairs and festivals



When the study intended to find the awareness level of different stakeholders on Ministry of Tourism's participation in different events/ fairs and festivals, it was observed that few hoteliers, travel agents, tour operators and tour transport operators were aware of Ministry's participation in conventions, art and craft festivals, trade

fairs, dance festivals, food festivals, Taj festival, spring festival, rath yatra, sports, seminars/events on tourism, etc. Overall, it was observed that the awareness and knowledge of the stakeholders on participation of Ministry of Tourism on different events/ fairs and festivals is quite poor.

9.2 Events/ fairs and festivals Ministry of Tourism should participate in and provide assistance

Few hoteliers, travel agents, tour operators and tour transport operators opined that the Ministry should participate in events/ conventions on tourism, dance festivals, deepostav and film festivals. Few hoteliers, travel agents, tour operators and tour transport operators also opined that the Ministry should provide assistance to rath yatra, deepostav and events/conventions on tourism.

9.3 Experience of niche industries participating in events / fairs

While the study intended to collect the experience of the niche industries who reported having participated in events / fairs in which the Ministry of Tourism also participated, all of them informed that they had a wonderful experience in participating in those events or fairs.

Table-9.1: Experience of the niche industries participating in events / fairs in which the Ministry of Tourism also participated (n=46 includes only those who reported having participated in such events where MOT too was a participant or patron)

Experience	n	%
Excellent	12	26.1
Very good	26	63.4
Good	8	10.5
Average	-	-
Poor	-	-

The experience and effect of participating in major travel fairs is positive as it enhances the visibility of the Ministry and its initiatives. It also introduces the different stakeholders to the new initiatives of the Ministry.

9.4 Relative impact of participation of India Tourism in major travel fairs towards promotion of tourism within India

- i) **SATTE:** The relevant stakeholders who were interviewed during the study expressed satisfaction with the positive impact of participation of India Tourism in South Asian Travel and Tourism Exchange (SATTE) as the number of enquiries generated and the visitors to the stall during this fair were high every time. There was not even one respondent who rated the impact of participation of India Tourism in SATTE as less. The India Tourism officials shared their positive experiences and stated that traffic to the India Tourism stall was high during the fair. Most of the travel and tourism industry respondents who had been to one or the other editions of SATTE in the past recalled clearly the stall of India Tourism in SATTE.

- ii) **Kerala Travel Mart (KTM):** The interviews with the stakeholders did not reveal evidence of very high recall of the India Tourism stall in KTM. Even as the India Tourism Officials of offices located in Southern India had positive things to share about the participation, the industry respondents did not seem to recall significant visibility and traffic in the India Tourism Stall at KTM.

- iii) **Travel and Trade Fairs (TTF):** Ministry of Tourism through the India Tourism offices has been participating in the various Travel and Trade Fairs (TTFs) held in different cities of India every year. The impact of these in terms of recall of the stalls as well as the traffic of visitors and enquiries generated thereof was rated as significant by the information available in the India Tourism offices. More than 70% of the respondents of Travel and Tourism industry who have been to TTF not only recalled having been to the India Tourism stall but also rated it as 'good and useful'.

- iv) **Great Indian Travel Bazar (GITB):** The flagship tourism event of industry body, FICCI and Rajasthan Tourism that is held biannually has recorded the participation by the Ministry of Tourism. About 25% of the travel and tourism respondents who have been to various editions of this even could recall the

India Tourism stall. They rated it as 'useful' in enabling them to promote domestic tourism. Therefore, the impact of the participation in GITB can be rated as Fair. There is a scope of improvement to convert this into 'Good'. Perhaps the stall design, layout, location and space booked needs a review.

- v) **India Travel Mart (ITM):** India Travel Mart is an annual event which is held in a different city each year. India Travel Mart (ITM) brings people together to promote Inbound, Outbound and Domestic Tourism and features about 100-125 exhibitors each year. During the field investigation, one third of the those respondents from travel and tourism trade who had been to ITM in its past editions could clearly recall having visited the India Tourism stall and engaged with the personnel posted there. They also found these stalls to be useful and good for enabling them with information and guidance to promote domestic tourism. Therefore, the effectiveness can be termed as 'Good' as far as impact of participation of Ministry of Tourism in ITM is concerned.

CHAPTER-X

EFFECTIVENESS OF RELEASE OF ADVERTISEMENTS AND ADVERTORIALS

The ministry extends funding support for release of advertisements and advertorials by the domestic India Tourism offices. These are normally coinciding with commemoration of certain special days and are meant to improve the visibility of Ministry's efforts at the local level. Such communication can be released in newspapers and magazines. The study tried to assess the effect of this initiative.

10.1 Seen advertisements and advertorials

Very few tourists (13.4%) and local residents reported that they have seen advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism, while most tourists (86.6%) and local residents said that they have not seen the advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism.

However, majority of the hoteliers (66.7%), tour operators (69.9%), travel agents (65.2%) and tour transport operators (76%) said that they have seen advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism.

Table-10.1: Tourists and locals seen advertisements and advertorials of MOT in newspapers and magazines for promotion of tourism

Options	Tourists		Locals	
	n	%	n	%
Yes	2185	13.4	2037	12.4
No	14096	86.6	14330	87.6

Table-10.2: Other stakeholders seen advertisements and advertorials of MOT in newspapers and magazines for promotion of tourism

Options	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
Yes	182	66.7	179	69.9	167	65.2	193	76.0
No	91	33.3	77	30.1	89	34.8	61	24.0

The tourists who have seen advertisements and advertorials of MOT in newspapers and magazines for promotion of tourism, 34.8% of them said that they were motivated by the attractiveness and beautiful scenery given in the advertisements/ advertorials for a tourist visit, while 31% of them said that they were motivated by the information given in the advertisements/ advertorials for a tourist visit. The tourists who have seen advertisements and advertorials of MOT in newspapers and magazines for promotion of tourism, 76.1% of them said that they were motivated by the information given in the advertisements/ advertorials for a tourist visit.

10.2 Effectiveness of advertisements and advertorials

When the hoteliers, tour operators, travel agents and tour transport operators were asked for their opinion on the effectiveness of the advertisements and advertorials in helping the tourism sector in the country, majority of the hoteliers and tour transport operators as well as about half of the tour operators and travel agents viewed that the advertisements and advertorials of the Ministry motivate people to visit the tourist places; while more than one-third hoteliers, tour operators, travel agents and tour transport operators viewed that advertisements and advertorials of the Ministry create awareness regarding different tourism projects among the people, provide information about different initiatives of Ministry of Tourism, and help to enrich the knowledge of tourism resources of the country.

Table-10.3: Opinion on advertisements and advertorials of MOT help the tourism sector in the country

Opinion	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
Help to enrich the knowledge of tourism resources of the country	71	39.0	56	31.3	57	34.1	59	30.6
Provide information about different initiatives of Ministry of Tourism	61	33.5	73	40.8	61	36.5	65	33.7
Create awareness regarding different tourism projects among the people	56	30.8	82	45.8	64	38.3	73	37.8
Motivate people to visit the tourist places	104	57.1	88	49.2	79	47.3	109	56.5
Any other (specify)	3	1.6	2	1.1	1	0.6	-	-

10.3 Desired information in advertisements and advertorials

The kind of information the tourists and locals want to see in advertisements and advertorials of Ministry of Tourism in different media is given in the table below:

Table-10.4: Kind of information the tourists and locals want to see in advertisements and advertorials

Medium	Type of information the tourists want	Type of information the locals want
Advertisements on TV	Specialty of the tourist places, tourism projects, road map	More information on tourist places like services and

	and guide of tourist places, information on religious monuments, etc.	facilities available, information in regional/local language, information on fairs and festivals, etc.
Advertisements in Newspaper	Details of tourist places, information on fairs and festivals, road map and guide of tourist places, information on places having natural beauty and sceneries, information on places for wild life, etc.	More information on tourist places like services and facilities available, photos and pictures of the tourist places, information in regional/local language, information on historical places, etc.
Online	Online upload of the ongoing events and fairs, updated information on tourist places and facilities & services available at the tourist places, promotion of eco tourism, roadmap and direction to the tourist places, etc.	More information on fairs, festivals and tourist places, information on facilities & services available at the tourist places, roadmap and direction to the tourist places, upload photo and video of tourist places, information on tourist resources of the country, information on projects for the promotion of tourism, etc.
In printed publicity material	Facilities & services available at the tourist places, information on religious locations, information local events and festivals, information on initiatives and projects undertaken to promote tourism, etc.	Detailed information of the tourist places including facilities and services available at the tourist places, information on historical places, information on tourism events, fairs and festivals, etc.

10.5 Impact of sampled communication campaign projects of the past years

Certain communication campaigns in the past were taken up as projects under the DPP scheme. The relevant component for funding such a campaign is 'Media campaigns and Promotional activities undertaken directly by MoT under the DPP scheme. The impact assessment can best be done by recording the following from among the respondents:

- i) The number of those from among the sampled tourists who can recall each of the sampled campaigns.
- ii) The attitude change or a behaviour modification that may have happened as per the perception of the respondents.

There are 81 such TV campaigns that have been undertaken directly by MOT between 2010-11 and 2014-15. Six campaigns from the 81 campaigns were selected for evaluation as per the sampling guidelines mentioned in the TOR.

Table-10.5: Sampling of TV campaigns undertaken by MOT

Financial Year	Total Number of direct communication campaigns in a year	Sampled number of communication campaigns as per the guideline
2009-10	11	1
2010-11	11	1
2011-12	12	1
2012-13	11	1
2013-14	17	1
2014-15	19	1
Total	81	6

The next stage of the study was to select specific projects for the impact assessment study. The sample campaigns were shortlisted based on judgemental sampling wherein the objective was to identify campaign projects that were launched with a range of themes through the years. The selected samples are presented in the following table.

Table 10-6: TV campaigns selected as samples for evaluation

Year	TV campaigns
2009-10	TVC- Good Behaviour towards tourists: Amir Khan- May-June 2009
2010-11	TVC- J&K as a tourist destination- Feb. 2011
2011-12	TVC- Saare Jahaan se Achcha- Feb. 2012
2012-13	TVC- North East as tourist destination: Sept-Oct 2012
2013-14	TVC- Social Awareness campaign on cleanliness
2014-15	TVC- Social Awareness campaign on good behaviour with tourists

Once the TV campaigns were selected, the visuals associated with it, the campaigns' verbal content (the copy associated with the campaign) and inferred objectives of the campaigns were documented in the form of documents to be shown to the respondents.

In the field, the pictures and narratives were to be supplemented with the apparent introduction by the field researcher. A total of 25 respondents in the age group above 25 years were from among the surveyed tourists at each surveyed location were selected purposively and a brief interview was conducted where the respondent was shown the documentation sheet of all six campaigns and asked to indicate responses on three parameters.

- i) Whether the campaign is recalled by them or not?
- ii) If recalled, did it lead to their action taken or behaviour change in alignment with the objectives of the campaign?
- iii) If recalled, do they remember any action taken or behaviour change in alignment with the objectives of the campaign?

The findings based on the purposive survey of MOT's communication projects of past few years based on a sample of 575 tourist respondents are as follows:

Table 10-7: Findings related to impact assessment of sample TV campaigns

Sl. No.	Year	Media Campaign details	Respondents who recalled the campaign (%)	Respondents who admitted action taken/behaviour change in themselves (%)	Respondents who recalled action taken/behaviour change among their acquaintances (%)
1	2009-10	TVC- Good Behaviour towards tourists: Amir Khan-May-June 2009	78.3	69.3	52.0
2	2010-11	TVC- J&K as a tourist destination-Feb. 2011	45.7	1.5	1.9
3	2011-12	TVC- Saare Jahaan se Achcha- Feb. 2012	57.7	14.8	6.9
4	2012-13	TVC- North East as tourist destination: Sept-Oct 2012	43.5	8.5	6.5
5	2013-14	TVC- Social Awareness campaign on cleanliness	21.6	80.6	60.5
6	2014-15	TVC- Social Awareness campaign on good behaviour with tourists	44.7	59.1	44.0

It can be inferred from the findings of the impact assessment that certain campaigns have been effective in having a high recall value and therefore have made a place among the target audience. Campaigns listed at Sl. No. 1, 2, 3 and 6 have proved to be

relatively more memorable than others. These campaigns have been efficient in establishing a reach. However, the effectiveness of the campaign project may or may not have a direct relationship with the efficiency. While campaign 1 & 6 are both efficient and effective because these are perceived to have led to behaviour change or action taken in consonance with the campaign objectives. On the other hand, the Social awareness campaign on cleanliness is not recalled by very many people but is cited as having caused a positive behaviour change.

There also have been campaigns which are not as efficient or as effective as the campaigns cited above but if these were to be benchmarked against the normal response to such campaigns in terms of percentages, we can safely say that all of the campaign projects have done well. The common numbers for such campaign in communication industry are less than 20 percent; these campaigns are over that number. The amount being allocated for this head is found to be less as the rates of advertising in the media have gone up steeply. The process of approval also needs to be expedited.

CHAPTER-XI

EFFECTIVENESS AND IMPACT OF MDA SCHEME

The Market Development Assistance (MDA) scheme is meant to assist the trade partners from travel, tourism and hospitality sector to improve their marketing performance.

The hoteliers, tour operators, travel agents and tour transport operators were asked to provide their views on the effectiveness of domestic MDA scheme.

On timeliness of grants of the domestic MDA scheme, 13.9% hoteliers, 15.2% tour operators, 21.9% travel agents and 11.4% tour transport operators viewed that it is very effective while 42.9% hoteliers, 37.5% tour operators, 34% travel agents and 41.3% tour transport operators viewed that the timeliness of grants of the domestic MDA scheme is less effective; and 20.5% hoteliers, 34.4% tour operators, 24.6% travel agents and 31.1% tour transport operators viewed that timeliness of grants of the domestic MDA scheme is not at all effective. Some hoteliers, tour operators, travel agents and tour transport operators informed that they did not know whether the timeliness of grants of the domestic MDA scheme is effective or not.

On procedures of the domestic MDA scheme, 19.4% hoteliers, 19.1% tour operators, 23.8% travel agents and 14.6% tour transport operators viewed that it is very effective while 28.2% hoteliers, 27% tour operators, 22.3% travel agents and 20.9% tour transport operators viewed that the procedures of the domestic MDA scheme is less effective; and 28.2% hoteliers, 39.8% tour operators, 34% travel agents and 48% tour transport operators viewed that the procedures of the domestic MDA scheme is not at all effective. Some hoteliers, tour operators, travel agents and tour transport operators informed that they did not know whether the procedures of the domestic MDA scheme is effective or not.

On adequacy of grants under the domestic MDA scheme, 12.5% hoteliers, 16.8% tour operators, 16.8% travel agents and 11% tour transport operators viewed that it is very effective while 36.3% hoteliers, 34.4% tour operators, 34.8% travel agents and 37% tour transport operators viewed that the adequacy of grants under the domestic MDA scheme is less effective; and 23.4% hoteliers, 32% tour operators, 27.7% travel agents

and 33.5% tour transport operators viewed that the adequacy of grants under the domestic MDA scheme is not at all effective. Some hoteliers, tour operators, travel agents and tour transport operators informed that they did not know whether the adequacy of grants under the domestic MDA scheme is effective or not.

Table-11.1: Rating of effectiveness of domestic MDA scheme

Component	Rating	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
		n	%	n	%	n	%	N	%
Timeliness of grants	Very effective	38	13.9	39	15.2	56	21.9	29	11.4
	Less effective	117	42.9	96	37.5	87	34.0	105	41.3
	Not effective	56	20.5	88	34.4	88	24.6	79	31.1
	Cannot say	62	22.7	33	12.9	50	19.5	41	16.1
Procedures	Very effective	53	19.4	49	19.1	61	23.8	37	14.6
	Less effective	77	28.2	69	27.0	57	22.3	53	20.9
	Not effective	77	28.2	102	39.8	87	34.0	122	48.0
	Cannot say	66	24.2	36	14.1	51	19.9	42	16.5
Adequacy of grants	Very effective	34	12.5	43	16.8	43	16.8	28	11.0
	Less effective	99	36.3	88	34.4	89	34.8	94	37.0
	Not effective	64	23.4	82	32.0	71	27.7	85	33.5
	Cannot say	76	27.8	43	16.8	53	20.7	47	18.5

During the study, niche industries were asked about the effectiveness of the MDA scheme for domestic tourism. On timelines of grants of MDA scheme, 22.9% informed that it as less effective while 11.4% informed it as not effective and 65.7% could not say whether the timeliness of grants under MDA scheme is effective or not. On procedures of sanctioning grants under MDA scheme, 2.9% niche industries informed it as very effective, while 20% informed it as less effective, 57.1% informed it as not effective and

20% could not say whether the procedures followed under MDA scheme for sanctioning of grants is effective or not. On adequacy of grants under MDA scheme, 8.6% niche industries informed it as very effective, while 5.7% informed it as less effective, 28.6% informed it as not effective and 57.1% niche industries could not say whether the adequacy of grants under MDA scheme is effective or not. Overall, according to the opinion of niche industries, timeliness of grants, procedures of sanctioning grants and adequacy of grants under MDA scheme are less effective or not effective for domestic tourism.

Table-11.2: Opinion of niche industries on effectiveness of MDA scheme for domestic tourism (n=35 represents only those who have experience of either enquiring about MDA or have availed of benefits under MDA scheme from MOT

Components	Very effective		Less effective		Not effective		Cannot say	
	n	%	n	%	n	%	n	%
Timeliness of grants	-	-	8	22.9	4	11.4	23	65.7
Procedures	1	2.9	7	20.0	20	57.1	7	20.0
Adequacy of grants	3	8.6	2	5.7	10	28.6	20	57.1

During the study, industry associations were asked about the effectiveness of the MDA scheme for domestic tourism. On timelines of grants of MDA scheme, 13.3% informed that it as less effective while 6.7% informed it as not effective and 80% could not say whether the timeliness of grants under MDA scheme is effective or not. On procedures of sanctioning grants under MDA scheme, 13.3% industry associations informed it as less effective, 6.7% informed it as not effective and 80% could not say whether the procedures followed under MDA scheme for sanctioning of grants is effective or not. On adequacy of grants under MDA scheme, 16.7% industry associations informed it as less effective, 10% informed it as not effective and 73.3% industry associations could not say whether the adequacy of grants under MDA scheme is effective or not. Overall, according to the opinion of industry associations, timeliness of grants, procedures of sanctioning grants and adequacy of grants under MDA scheme are less effective or not effective for domestic tourism.

Table-11.3: Opinion of industry associations on effectiveness of MDA scheme for domestic tourism

Components	Very effective		Less effective		Not effective		Cannot say	
	n	%	n	%	n	%	n	%
Timeliness of grants	-	-	4	13.3	2	6.7	24	80.0
Procedures	-	-	4	13.3	2	6.7	24	80.0
Adequacy of grants	-	-	5	16.7	3	10.0	22	73.3

Based on the responses received in the field study, it is necessary that the MDA scheme is updated and reflects the realities of costs and requirements of the present day. The amounts available for disbursement under different items and ease of process are the need of the hour.

CHAPTER-XII

CONTRIBUTION OF PRODUCTION OF PUBLICITY MATERIALS AND COLLATERALS

12.1 Effectiveness of printed publicity materials and collaterals

During the study, the tourists and locals were asked to provide their opinion on the effectiveness of printed publicity material and collaterals published by Ministry of Tourism towards promotion of tourism in the country. In response, 30.3% tourists and 29.1% local residents viewed that the printed publicity material and collaterals are very effective, while 21.4% tourists and 24.6% viewed those as less effective, 16.6% tourists and 18.1% local residents viewed those not effective. Also, more than one-quarter tourists (31.8%) and local residents said that they are not aware whether printed publicity material and collaterals published by Ministry of Tourism towards promotion of tourism in the country are effective or not.

Chart-12.1: Opinion of the tourists and locals on the effectiveness of printed publicity material and collaterals

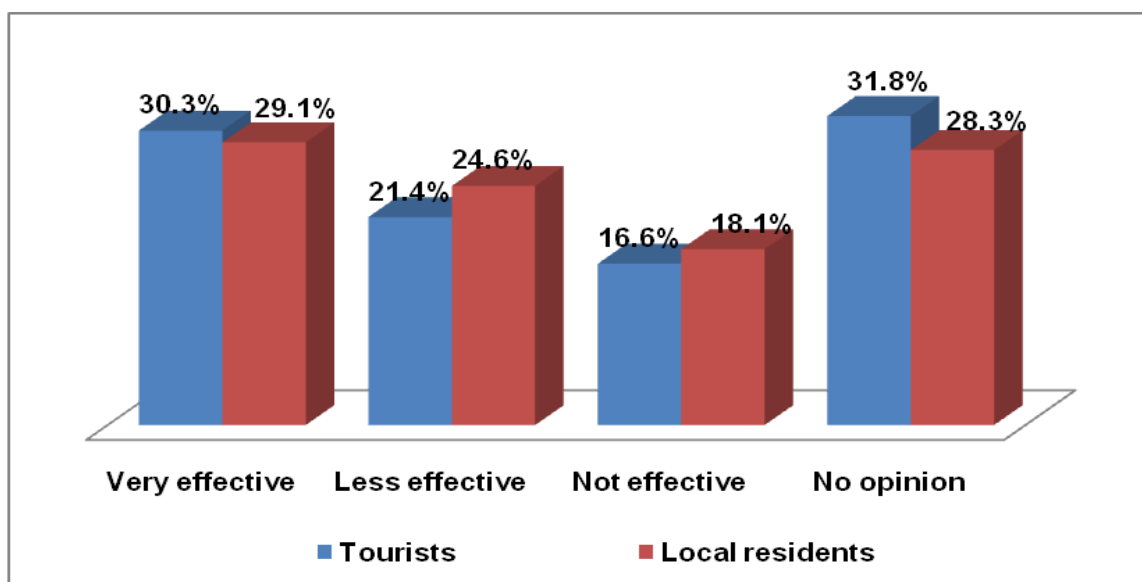


Table-12.1: Opinion of the tourists and locals on the effectiveness of printed publicity material and collaterals

Opinion	Tourists		Locals	
	n	%	n	%
Very effective	4930	30.3	4763	29.1
Less effective	3478	21.4	4020	24.6
Not effective	2698	16.6	2956	18.1
No opinion	5175	31.8	4628	28.3

When the hoteliers, tour operators, travel agents and tour transport operators were asked to provide their opinion on the effectiveness of printed publicity materials and collaterals published by Ministry of Tourism towards promotion of tourism in the country, majority of the hoteliers, tour operators, travel agents and tour transport operators informed that the printed publicity materials and collaterals were somewhat effective, while about one-fifth of them informed that those were not effective and another one-fifth respondents informed that they have no idea whether the printed publicity materials and collaterals published by Ministry of Tourism towards promotion of tourism in the country were effective or not.

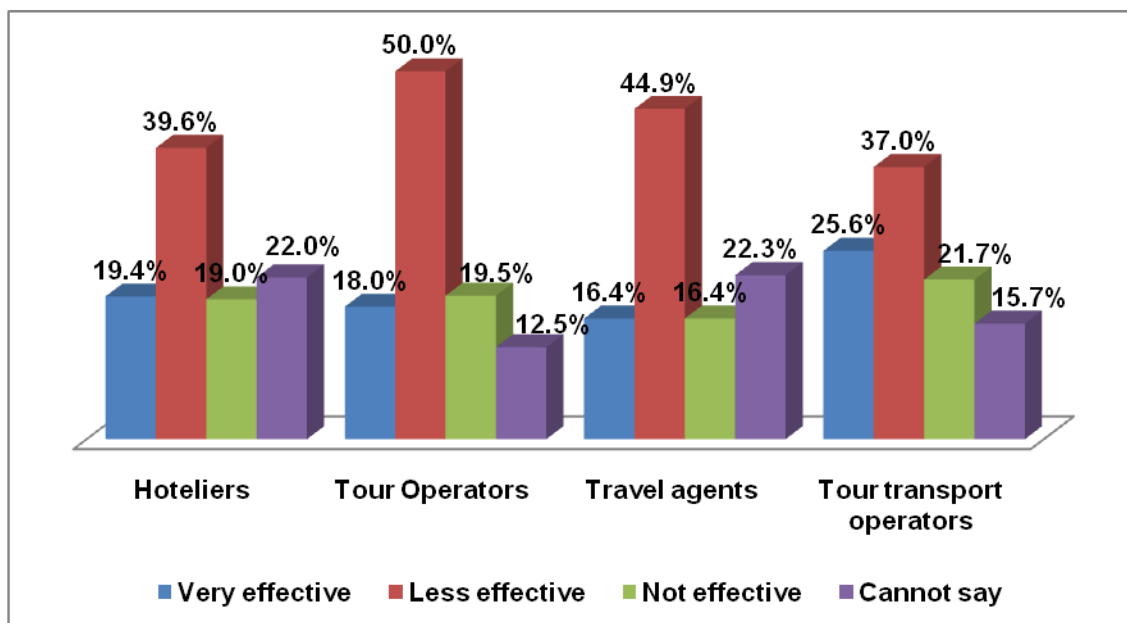
Chart-12.2: Opinion of other stakeholders on effectiveness of printed publicity materials and collaterals

Table-12.2: Opinion of other stakeholders on effectiveness of printed publicity materials and collaterals

Opinion	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
Very effective	53	19.4	46	18.0	42	16.4	65	25.6
Less effective	108	39.6	128	50.0	115	44.9	94	37.0
Not effective	52	19.0	50	19.5	42	16.4	55	21.7
Cannot say	60	22.0	32	12.5	57	22.3	40	15.7

12.2 Usefulness of publicity material and collaterals

While asked to the State Tourism Departments about the usefulness of the publicity material and collaterals in promoting tourism, majority of the officials stated that the publicity material and collaterals have significantly increased the tourist arrivals, in providing information to the tourists on tourist resources, in income generation in tourism sector and in providing information regarding different initiatives of tourism department.

Table-12.3: Extent to which publicity material and collaterals have been useful in promoting tourism in the state (n=40)

Types of impacts	Significantly increased		Little increased		Not increased		Cannot say	
	n	%	n	%	n	%	n	%
Increase in tourist arrival	30	75.0	8	20.0	-	-	2	5.0
Provide information to the tourists on tourist resources	25	62.5	15	37.5	-	-	-	-
Income generation	31	77.5	9	22.5	-	-	-	-
Provide information regarding different initiatives of tourism department	32	80.0	8	20.0	-	-	-	-

CHAPTER-XIII

USEFULNESS OF FINANCIAL SUPPORT TO INDUSTRY ASSOCIATIONS



The industry associations are primarily assisted by the Ministry of Tourism for conducting conventions, summits and meetings. In addition to this, assistance is also given towards reimbursing travel costs for participation in such events. This is currently being done under the heading of “Promotional activities undertaken in collaboration with

stakeholders” and funds are released mainly to different trade associations. This is aimed at bringing together the different stakeholder groups on a common platform to promote domestic tourism. As part of this study, associations of different stakeholder groups like, hotels, restaurants, travel and tour operators, transport operators etc. were contacted based on purposive sampling. A total of 30 respondents belonging to 14 different entities who are office bearers of the respective associations were identified as the respondents for the purpose. In addition to that, 13 items of assistance (projects) were sampled out for special assessment. These projects were chosen from year-wise list and comprised 5% of the projects in a particular year. The projects spanned a time duration from 2010-11 to 2014-15. The responses are presented in the following tables:

13.1 Usefulness of different media for advertisement

A total of 30 industry associations were interacted during the study. According to the opinion of the industry associations, newspaper is the most useful media for advertisement for promotion of association events related to tourism, which is followed by magazine, radio and TV.

Table-13.1: Useful media for advertisement for promotion of association events related to tourism

Useful media	Rank-1		Rank-2		Rank-3	
	N	%	n	%	n	%
TV	3	10.0	4	13.3	5	16.7
Radio	5	16.7	11	36.7	3	10.0
Magazine	8	26.7	6	20.0	3	10.0
Newspaper	10	33.3	6	20.0	7	23.3
MOT website	1	3.3	1	3.3	1	3.3
Online portals	1	3.3	1	3.3	5	16.7
Social media like Facebook, Twitter, Instagram, etc.	2	6.7	1	3.3	6	20.0

13.2 Evaluation of projects assisted by the Ministry of Tourism

Special interviews were conducted for 9 organisations; assistance items were identified to comprise the sample of 13 projects.

Table-13.2: List of 13 Projects selected for evaluation under category “Promotional activities undertaken in collaboration with stakeholders”

Year	Category	Purpose	Organization and Location
2010-11	MDA	Assistance	M/s. Explore India Tourism Pvt. Ltd., F – 8, Lower Ground Floor, Kalkaji Main Market, New Delhi – 110 019
2010-11	Assistance to Tourism Trade Association	Assistance	Indian Association of Tour Operators (IATO) 310 Padma Tower II 22 Rajendra Place

			New Delhi - 110 008
2011-12	Assistance to Tourism Trade Association	Assistance	Regional Director (West), IT, Mumbai 123, M Karve Road, Opp. Church Gate, Mumbai, 400020, Maharashtra
2011-12	Assistance to Tourism Trade Association	Assistance	ITDC, Ashok Reservations & Marketing Services (AR&MS), New Delhi India Tourism Development Corporation, Jeevan Vihar, 3 rd Floor, 3 Parliament Street, New Delhi - 110001
2011-12	Assistance to Tourism Trade Association	Assistance	ITDC, Ashok Reservations & Marketing Services (AR&MS), New Delhi India Tourism Development Corporation, Jeevan Vihar, 3 rd Floor, 3 Parliament Street, New Delhi - 110001
2012-13	Assistance to Tourism Trade Association	Assistance	Regional Director (North East) Assom Paryatan Bhawan, A.K. Azad Road, Paltan Bajar, Guwahati-781 008, Assam
2012-13	Assistance to Tourism Trade Association	Assistance	Travel Agents Association of India (TAAI) 2-D Lawrence and Mayo House, 276, DR. D N Road, Fort, Mumbai-400001
2012-13	Assistance to Tourism Trade Association	Assistance	Association of Domestic Tour Operators of India (ADTOI) 403, 4th Floor, Padma Tower-2 22, Rajendra Place New Delhi-110008
2013-14	Assistance to Tourism Trade	Assistance	Indian Association of Tour Operators 310 Padma Tower II

	Association		22 Rajendra Place New Delhi - 110 008
2013-14	Assistance to Tourism Trade Association	Assistance	Indian Association of Tour Operators 310 Padma Tower II 22 Rajendra Place New Delhi - 110 008
2013-14	Assistance to Hospitality Trade Association	Annual convention	Federation of Hotel & Restaurants Association in India (FHRAI) B-82, 8th Floor, Himalaya House, 23 Kasturba Gandhi Marg, New Delhi, Delhi 110001
2013-14	Assistance to Hospitality Trade Association	Annual convention	Indian Heritage Hotels Association (IHHA) Indian Heritage Hotels Association Mandawa Haveli, Sansar Chandra Road, Jaipur-302001
2014-15	MDA	Assistance	M/s. Clara Tours, Near Assam Club, Howell Road, Laban, Shillong- 793004, Meghalaya

The observations/suggestions by these organizations were as follows:

- i) Even as any amount of funding even if it is of supplementary nature is welcome, the assistance provided by MOT under DPP as part of the projects was a very miniscule part of the budget for the activity. The assistance amount needs to be increased from the present levels substantially. As per the reported responses, the present level of assistance from Ministry of Tourism comprises 7-15 percent of the total expenditure that gets incurred. According to the personnel of industry associations, this needs to be reviewed.
- ii) The funds need to be released in a timely manner with easier procedures.
- iii) The organisations stated that despite the difficulties they will continue to be a part of the scheme in the coming years.

CHAPTER-XIV

AWARENESS AND EFFECTIVENESS OF NICHE TOURISM PRODUCTS

14.1 Awareness on niche tourism related programmes of Ministry of Tourism

The study found that 21.2% hoteliers, 32.5% tour operators, 43% travel agents and 42.9% tour transport operators are aware of the wellness tourism; while 7.3% hoteliers, 27.2% tour operators, 18.4% travel agents and 16% tour transport operators are aware of golf tourism. Others reported that they are not aware of the niche tourism related programme of Ministry of Tourism.

14.2 Suggestions about Niche tourism programmes that Ministry of Tourism should assist

Since the awareness level of stakeholders about the niche tourism related programmes of MOT was significant only for adventure, wellness and golf tourism, the respondents suggested that the Ministry should provide assistance to wellness and golf tourism programmes.

The Ministry of Tourism has taken the initiative of identifying, diversifying, developing and promoting the nascent/upcoming niche products of the tourism industry. This is done in order to overcome the aspect of 'seasonality' to promote India as a 365 days destination, attract tourists with specific interests and to ensure repeat visits for the products in which India has comparative advantage.

The following Niche Products have been identified by the Ministry of Tourism for development and Promotion:

- i. Rural Tourism
- ii. Cruise Tourism
- iii. Adventure Tourism
- iv. Medical Tourism
- v. Wellness Tourism

- vi. Golf Tourism
- vii. Polo Tourism
- viii. Meetings Incentives Conferences and Exhibitions (MICE)
- ix. Eco Tourism
- x. Film Tourism

Identifying niche products is a dynamic process. Thus, new products may be added in due course. The Ministry of Tourism has constituted committees for promotion of Golf Tourism and Wellness Tourism. Specific guidelines were formulated for Ministry of Tourism to support Golf, Polo and Wellness Tourism.

RURAL TOURISM

The scheme of Rural Tourism was started by the Ministry in 2002-03 with the objective of showcasing rural life, art, culture and heritage at rural locations and in villages, which have core competence in art & craft, handloom, and textiles as also an asset base in the natural environment. The intention is to benefit the local community economically and socially as well as enable interaction between tourists and local population for a mutually enriching experience. The promotion of village tourism is also aimed at generating revenue for the rural communities through tourists' visitations, thereby stopping the exodus from rural to urban areas.

While in the initial two years of the scheme, only physical infrastructure (Hardware or HW) development activities were taken up under the scheme, from the year 2004-05 capacity building (Software or SW) activities too were taken up. The HW components of the rural tourism projects (RTPs) have been provided funds from the plan scheme 'Product/ Infrastructure development for destinations and circuits' (PIDDC). The SW components of 36 RTPs sanctioned during 2004-05 and 2005-06 have been funded from GOI-UNDP Endogenous Projects scheme. All SW components sanctioned from 2006-07 have been funded from the plan scheme 'Capacity Building for Service Providers' (CBSP). As on 28 February 2011, 169 rural tourism sites in 28 States/Union Territories have been sanctioned by the Ministry of Tourism.

CRUISE TOURISM

a) Ocean Cruise

'Cruise Shipping' is one of the most dynamic and fastest growing components of the leisure industry worldwide. India with its vast and beautiful coastline, virgin forests and undisturbed idyllic islands, rich historical and cultural heritage, can be a fabulous tourist destination for cruise tourists. The Cruise Shipping Policy of the Ministry of Shipping was approved by the Government of India on 26th June, 2008. The Ministry of Tourism has included promotion of Cruise Shipping under its "New initiatives". Some of the major initiatives of Ministry of Tourism to promote the cruise tourism include:

- i) Constitution of a Steering Committee to act as a nodal body under the chairmanship of Secretary (Shipping) with Ministry of Tourism is the Member Secretary of this Committee.
- ii) Infrastructure development at Cochin Port for establishing Cruise Berthing facilities has been taken up and Cruise Passenger facilitation centre has been established at Cochin Port.
- iii) Sanction of Ministry of Tourism for the purchase of ferries to Poompuhar Shipping Corporation.

b) River Cruise

Ministry of Tourism provides Central Financial Assistance (CFA) to State Governments/Union Territories for development of tourist infrastructure and promotion of tourism including River Cruise. The following are the main projects sanctioned for development of River Cruise:

- i) Development of Circuit on rivers Godavari and Krishna in Andhra Pradesh.
- ii) Ministry of Tourism has sanctioned and released funds for development of Ganga Heritage River Cruise in West Bengal.
- iii) Ministry of Tourism has sanctioned a mega project for integrated development of infrastructure for Heritage and Hinterland Tourism in Goa including Mandovi and Zuari rivers to the State Government of Goa.
- iv) Financial assistance was extended for construction of Double Hull Boats, construction of Jetties, Cruise Vessels, Boats, etc.
- v) Funds have been sanctioned to the Government of Kerala by the Ministry of Tourism for the development of Backwater Circuit in Alappuzha in Back Water Region as a Mega Circuit.

- vi) In 2014, it was decided that the Ministry of Shipping and the Ministry of Tourism would jointly identify the routes for carrying out cruise tours on waterways and also take measures to develop necessary infrastructure. Accordingly, an empowered working group has been set up and it has identified 8 tourist circuits along national waterways.

ADVENTURE TOURISM

Adventure travel involves exploration or travel to remote, exotic areas. Adventure tourism is rapidly growing in popularity as a tourist seeks different kinds of vacations. Any constructive activity which tests the endurance of both a person and his equipment to its extreme limit is termed as Adventure.

Ministry of Tourism has taken following initiatives to Promote Adventure Tourism:

- i) The Ministry of Tourism has issued Guidelines for Approval of Adventure Tour Operators, which is a voluntary scheme, open to all bonafide adventure tour operators.
- ii) The Ministry of Tourism has also formulated a set of guidelines on Safety and Quality Norms on Adventure Tourism as basic minimum standards for adventure tourism activities. These guidelines cover Land, Air and Water based activities which include mountaineering, trekking, hand gliding, paragliding, bungee jumping and river rafting.
- iii) Central Financial Assistance is being extended to various State Governments/ Union Territories.
- iv) Infrastructure is being developed for facilities for trekking, rock climbing, mountaineering, aero-sports, winter/water related sports, trekker huts, wildlife viewing facilities, etc. Financial assistance for purchase of water sports equipment consisting of kayaks, canoes, paddle boats, fibre glass boats, hovercrafts, water scooters, etc. is also provided State Governments.
- v) Special efforts are made by the Ministry of Tourism to promote Inland Water Tourism by providing necessary infrastructural facilities. Financial assistance was extended for construction of Double Hull Boats, construction of Jetties, Cruise Vessels, Boats, etc.

- vi) The Indian Institute of Skiing & Mountaineering has been made fully operational in Gulmarg from January 2009. Various adventure courses have been started and are being successfully run by this institute.
- vii) Students/tourists have been trained through various Adventure Activities at IIS&M, Gulmarg:-
 - a) Snow Skiing Courses
 - b) Tourists given exposure in hot air balloon
 - c) Parasailing (only trial course done)
 - d) Paragliding trials at Gulmarg
 - e) Adventure and trekking
- viii) The National Institute of Water Sports, another organisation of Ministry of Tourism based in Goa, has got a new building and facilities upgraded for training in water sports activities.
- ix) The Ministry is working with the Indian Mountaineering Federation and Adventure Tour Operators Association of India to explore positioning India as an Adventure Destination.
- x) In order to enhance the quality of Adventure Tourism experience in the country, the Ministry of Tourism has given 'in principle' approval to Indian Mountaineering Federation to organize training programmes for Adventure and Mountain Guides under the Capacity Building for Service Providers(CBSP) scheme of Ministry of Tourism.
- xi) As an outcome of the continuous follow up by Ministry of Tourism, the Government of India has given security clearance for opening of additional peaks in Jammu & Kashmir (Leh Area) subject to stipulations and clearances from State Govt., Home Ministry and other concerned agencies. The opening of the additional peaks will help in positioning the Indian Himalayas as Adventure tourism destination.
- xii) Similarly, the Ministry of Tourism had also taken the issue regarding use of GPS and Satellite phone by the bonafide adventure tour operators so as to ensure that the safety standards are of international standards.
- xiii) Promotion of Camping sites has been encouraged to give a different experience to the discerning travellers. Ministry of Tourism has sanctioned funds for development of Camping sites where camping huts have been erected with State-of-the-Art technology.

- xiv) The guidelines of training of river rafting guides have been approved. In addition that, continuous skill testing and certification of such guides is being done regularly.
- xv) 'Hunar Se RozgarTak' scheme has been activated and a number of eligible and interested persons have been trained to serve as human resource in supporting adventure tourism.
- xvi) A campaign titled the "777 Days of the Incredible Indian Himalayas" aimed at promoting the Himalayas, internationally was launched wherein expeditions to Himalayas were given concessions in fees that was chargeable.

MEDICAL TOURISM

Medical tourism (also called medical travel, health tourism or global health care) is a term used to describe the rapidly-growing practice of travelling across international borders to obtain health care. Services typically sought by travelers include elective procedures as well as complex specialized surgeries such as joint replacement (knee/hip), cardiac surgery, dental surgery, and cosmetic surgeries. However, virtually every type of health care, including psychiatry, alternative treatments, convalescent care available. There are several Asian destinations like Singapore, Malaysia, Thailand etc. that are offering Medical care facilities and promoting Medical Tourism, India stands out among them for following reasons:-

- a. State-of-Art Medical facilities
- b. Reputed health care professionals
- c. Quality Nursing facilities
- d. No waiting time for availing the medical services

India's traditional health care therapies like Ayurveda and Yoga combined with allopathic treatment provides a holistic wellness which is comparative advantage.

The Medical tourism activity is mainly driven by the private sector. The Ministry of Tourism has only the role of a facilitator in terms of marketing this concept and promoting this in the key markets. The Ministry of Tourism has taken several steps to promote India as a Medical and Health Tourism Destination, which are as follows:

- a. Brochure, CDs and other publicity materials to promote Medical and Health tourism have been
- b. produced by the Ministry of Tourism and have been widely circulated for publicity in target markets.

- c. Medical and Health tourism has been specifically promoted at various international platforms such as World Travel Mart, London, ITB, Berlin, ATM etc.
- d. A new category of 'Medical Visa' has been introduced, which can be given for specific purpose to foreign tourist coming to India for medical treatment.
- e. Yoga/Ayurveda/Wellness has been promoted over the last decade in the print, electronic, internet and outdoor medium under the Ministry of Tourism's "Incredible India Campaign".
- f. Brochures and CDs on Body, Mind and Soul covering the traditional system of medicine have been produced and circulated extensively by the Ministry of Tourism.
- g. Road Shows focusing on Medical Tourism was organised abroad, these have sometimes been led by Minister of State for Tourism.
- h. The Ministry of Tourism has goat a study conducted by IITM Gwalior on the problems and challenges faced by Medical tourist visiting India.
- i. For participation in approved Medical/Tourism Fairs/Medical Conferences/Wellness Conferences/ Wellness Fairs and its allied Road Shows (PMT), Ministry of Tourism provides Market Development Assistance. This scheme was extended to the Medical Tourism Service Providers and Wellness Tourism Service Providers.
- j. The Ministry of Tourism also supported the National Conference – Health Tourism in India, organized by PHD Chamber of Commerce, held at New Delhi on 26th July, 2013.

WELLNESS TOURISM

Wellness Tourism is about travelling for the primary purpose of achieving, promoting or maintaining maximum health and a sense of well-being. Health Tourism holds immense potential for India. The Indian systems of medicine i.e. Ayurveda, Yoga, Panchakarma, Rejuvenation Therapy etc. are among the most ancient systems of medical treatment of the world. India can provide Medical and Health care of international standard at comparatively low cost. Most of the hotels/resorts are coming up with the Ayurveda Centres as an integral part. The leading tour operators have included Ayurveda in their brochures.

- a) National guidelines for accreditation of wellness centres have been developed by NABH in consultation with Department of AYUSH. This is important

- breakthrough as uniform standards and service qualities will be in place for the wellness centres in India.
- b) Brochure, CDs and other publicity materials to promote wellness tourism have been produced by the Ministry of Tourism and have been widely circulated for publicity in target markets.
 - c) Health tourism has been specifically promoted at various international platforms such as World Travel Mart, London, ITB, Berlin. Road shows have been held abroad, some of these have been led by Hon'ble Minister of Tourism.
 - d) Yoga/Ayurveda/Wellness have been promoted in the past years in the print, electronic, internet and outdoor medium under the Ministry of Tourism's "Incredible India Campaign".
 - e) Brochures and CDs on Body, Mind and Soul covering the traditional system of medicine have been produced and circulated extensively by the Ministry of Tourism.
 - f) The Marketing Development Assistance Scheme (MDA), administered by the Ministry of Tourism, Government of India, provides financial support to Wellness Tourism Service providers (WTSP) accredited by State Governments for participation in Wellness Conferences/ Fairs as well as participation in the Road Shows
 - g) Workshop on promotion of Wellness Tourism have been held with the objective of formulating strategies for development and promotion of Wellness Tourism.
 - h) Ministry of Tourism also supported Global Spa & Wellness Summit (GSWS), 2013 and FICCI Wellness Conference 2013. International Conference on Health Futures organized by Soukya Foundation at Bengaluru in November 2013 also received the Ministry's support.

GOLF TOURISM

Recognizing the potential to develop golf as a niche tourism product for attracting both international and domestic tourists, especially the high end visitors, Ministry of Tourism organized a workshop in January, 2011 in New Delhi on "Promotion of Golf Tourism". The Ministry of Tourism has formulated guidelines extending financial support for promotion of golf tourism. These guidelines address issues including inter-alia, training and capacity building for the service providers, participation in international & domestic events related events and making available quality publicity material. Training programmes for Caddies have been conducted with the support of Ministry of Tourism.

The Ministry of Tourism has also constituted the India Golf Tourism Committee (IGTC), which is the nodal body for golf tourism in the country. The IGTC approves golf events annually and provides funds for those events. The Ministry invited Expressions of Interest (EoI) from the Golf Clubs, Golf Event Managers, State Governments/UT Administrations, Approved Tour Operators/ Approved Travel Agents and Corporate Houses seeking financial support from the Ministry of Tourism for Golf Events, Golf Shows, Golf Promotional Workshops/ Events/Annual Meetings/Seminars eligible for financial support, with a view to promote Golf Tourism.

POLO TOURISM

Polo is termed as a "Heritage Sport" of India. The Ministry of Tourism promotes Polo in collaboration with the Indian Polo Association and has formulated guidelines identifying broad areas of support for promotion of this game as a Niche Tourism Product. National Polo festivals have been organized.

MEETINGS INCENTIVES CONFERENCES AND EXHIBITIONS (MICE)

Conventions and conferences are, today acknowledged as a significant segment of the tourism industry. The travel industry, under the patronage of the Ministry of Tourism, set up the India Convention Promotion Bureau (ICPB) in 1988 to make efforts to give thrust to the business of Conferences and Conventions.

ECO TOURISM

Ecotourism (also known as ecological tourism) is responsible travel to fragile, pristine, and usually protected areas that strives to be low impact and (often) small scale. In the recent years it has been seen that there is a growing trend for travel towards ecotourism destinations like National Parks and Wildlife Sanctuaries. The Ministry has commissioned surveys to assess the impact of tourism on wildlife, especially on tigers. These surveys covered Resorts, Hotels, Lodges, Camps and Guest Houses in and around Corbett National Park, Kaziranga National Park, Kanha National Park, Bandavgarh National Park, Pench Tiger Reserve and Mudumalai Wild Life Sanctuary under the initiative "Tigers - Our National Beauties". The reports have been shared with other stakeholders. The Ministry of Tourism has laid down guidelines for approval of Hotel Projects wherein the hotels at the project stage itself are required to incorporate various eco-friendly measures like sewage treatment plant (STP), rain water harvesting system, waste management system, etc. During the physical inspection of the hotel for

star classification, it is ensured that in addition to the afore-mentioned measures, other measures like pollution control, introduction of non-CFC equipment for refrigeration and air conditioning, and measures for energy and water conservation are also undertaken by the hotel.

FILM TOURISM

In 2012, the Ministry of Tourism developed guidelines for extending financial support to the State Government/Union Territory Administrations for promotion of Film Tourism. The support would cover feature films, documentaries, telefilms and television serials including reality TV shows. As part of the initiatives, the Ministry of Tourism has supported the Cannes Film Festival, the International Film Festival of India and the Film Bazaar 2013. Ministry of Tourism has signed a Memorandum of Understanding (MOU) with Ministry of Information and Broadcasting to promote Cinema of India as a sub-brand of 'Incredible India' at various international film festivals. The Ministry of Tourism has released funds to National Film Development Corporation to be utilized for promoting film tourism.

14.3 Type of activity in which the niche industries are involved

A sample of 100 personnel from businesses involved in niche tourism were interacted during the study. Those who were interacted, 45% were found to be involved in medical and wellness tourism, while 40% were involved in adventure tourism, 10% were involved in MICE and 5% were involved in golf tourism.

Chart-14.1: Type of activity in which the niche industries are involved

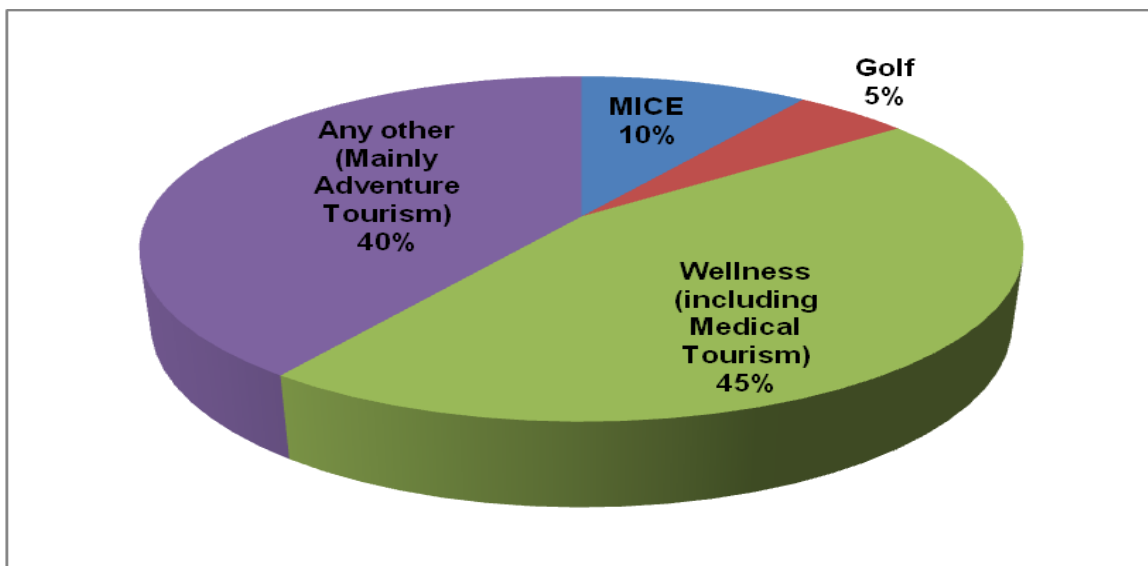


Table-14.1: Type of activity in which the niche industries are involved

Type of activity	n	%
MICE	10	10.0
Polo	-	-
Golf	5	5.0
Wellness (including Medical Tourism)	45	45.0
Any other (Mainly Adventure Tourism)	40	40.0

14.4 Benefits to the niche industries due to assistance by Ministry of Tourism

During the survey of 15 niche industries which have received assistance from Ministry of Tourism, all of them reported that there is increment in number of niche tourists and off-season tourists as an impact of financial assistance provided by Ministry of Tourism. Also, one-third of them informed that there is increment in tourist expenditure and in the time spent by the tourists on the niche activity.

Chart-14.2: Type of benefits the niche industries have achieved due to assistance provided by Ministry of Tourism

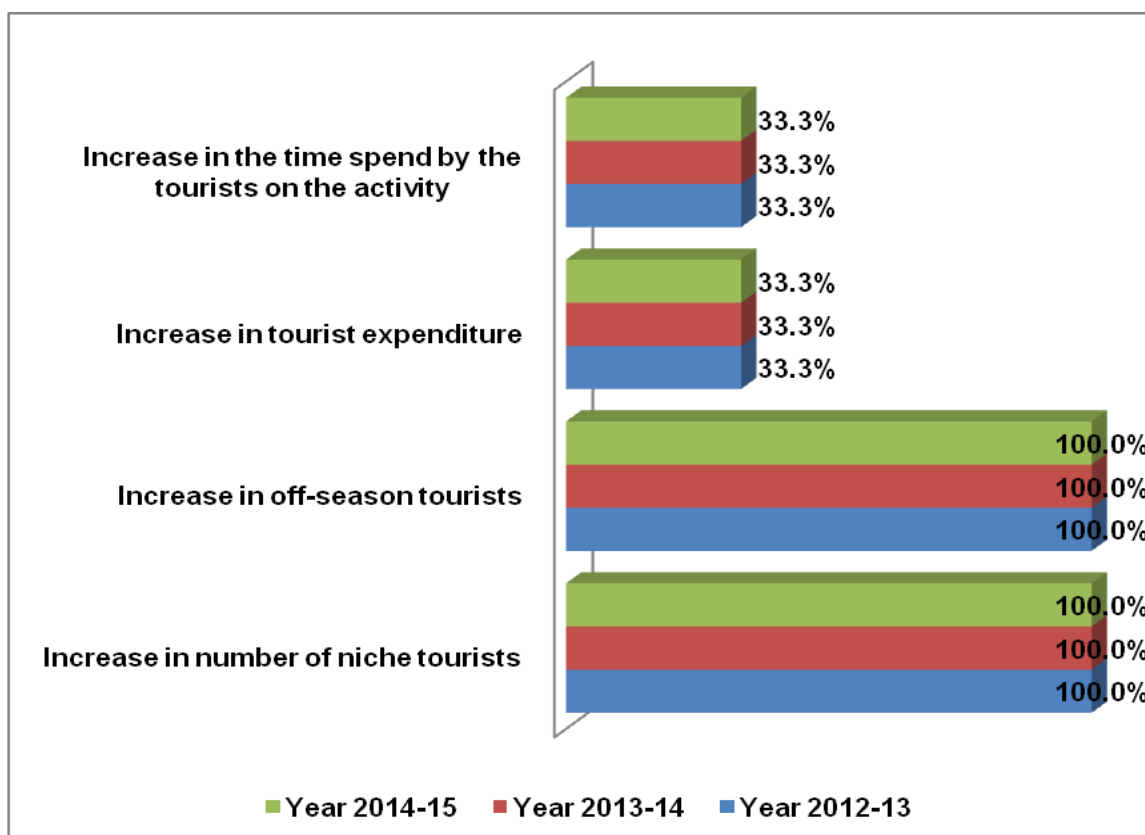


Table-14.2: Type of benefits the niche industries have achieved due to assistance provided by Ministry of Tourism

(Covers only those contacted who have availed assistance from MOT. n=15)

Benefits	2012-13		2013-14		2014-15	
	n	%	n	%	n	%
Increase in number of niche tourists	15	100.0	15	100.0	15	100.0
Increase in off-season tourists	15	100.0	15	100.0	15	100.0
Increase in tourist expenditure	5	33.3	5	33.3	5	33.3
Increase in the time spend by the tourists on the activity	5	33.3	5	33.3	5	33.3

14.5 Useful media for advertisement

According to the opinion of the personnel belonging to units in niche industries, TV is the most useful media for advertisement for increase in business in niche tourism, which is followed by radio. While 80% niche industries ranked TV as rank-1 or 2 as most useful media for advertisement, 88% niche industries ranked radio as rank-2 or 3 as most useful media for advertisement. Newspaper was found to be next useful media for advertisement which was ranked by 25% niche industries as rank-1 or 2 and magazine was found to be the fourth preference among the niche industries for advertisement for increase in business if niche tourism.

Table-14.3: Useful media for advertisement for increase in business of niche tourism (n=100)

Useful media	Rank-1		Rank-2		Rank-3	
	N	%	n	%	n	%
TV	45	45.0	35	35.0	20	20.0
Radio	12	12.0	43	43.0	45	45.0
Magazine	-	-	15	15.0	18	18.0
Newspaper	20	20.0	5	5.0	8	8.0
MOT website	-	-	-	-	-	-
Online portals	-	-	4	4.0	3	3.0
Social media like Facebook, Twitter, Instagram, etc.	-	-	-	-	2	2.0

Note= The row totals may not total up to 100 i.e. the total number of respondents because of responses in ranks lower than Rank 3

14.6 Niche tourism products the Ministry of Tourism should focus on

As per the opinion of the niche industries, Ministry of Tourism should focus on primarily on adventure tourism, wellness tourism and medical tourism. During the study, 56% niche industries ranked adventure tourism as rank-1 or 2, while 39% ranked wellness tourism as rank-1 or 2 and 25% ranked medical tourism as rank-1 or 2 to be focused by Ministry of Tourism.

**Table-14.4: Niche tourism products the Ministry of Tourism should focus on
(Opinion of niche industries. n=100)**

Niche tourism products	Rank-1		Rank-2		Rank-3	
	n	%	n	%	n	%
Film	-	-	4	4.0	7	7.0
Golf	5	5.0	2	2.0	8	8.0
Polo	-	-	-	-	4	4.0
Medical	20	20.0	5	5.0	20	20.0
Wellness	25	25.0	14	14.0	6	6.0
Rural	-	-	-	-	2	2.0
Adventure	40	40.0	16	16.0	14	14.0

Note: The total number of respondents also includes those having responses in ranks lower than Rank 3

As per the opinion of the industry associations, Ministry of Tourism should focus primarily on adventure tourism, wellness tourism and medical tourism. During the study, 66.7% industry associations ranked adventure tourism as rank-1 or 2, while 63.3% ranked wellness tourism as rank-1 or 2 and 43.3% ranked medical tourism as rank-1 or 2 to be focused by Ministry of Tourism.

**Table-14.5: Niche tourism products the Ministry of Tourism should focus on
(Opinion of industry associations)**

Niche tourism products	Rank-1		Rank-2		Rank-3	
	N	%	n	%	n	%
Adventure	14	46.7	6	20.0	7	23.3
Film	1	3.3	2	6.7	2	6.7
Golf	1	3.3	2	6.7	3	10.0
Polo	-	-	1	3.3	1	3.3

Medical	7	23.3	12	40.0	9	30.0
Wellness	7	23.3	6	20.0	6	20.0
Rural	0	-	1	3.3	2	6.7

14.6 Satisfaction of niche industries with DPP scheme guidelines

The niche industries that have some familiarity with DPP scheme guidelines were asked about the satisfaction with DPP scheme guidelines for promoting niche tourism products. It was observed that majority (56.7%) of them were little bit satisfied with DPP scheme guidelines, while 30% were not at all satisfied and only 13.3% niche industries were very much satisfied with DPP scheme guidelines for promoting niche tourism products.

Chart-14.3: Satisfaction of niche industries with DPP scheme guidelines for promoting niche tourism products

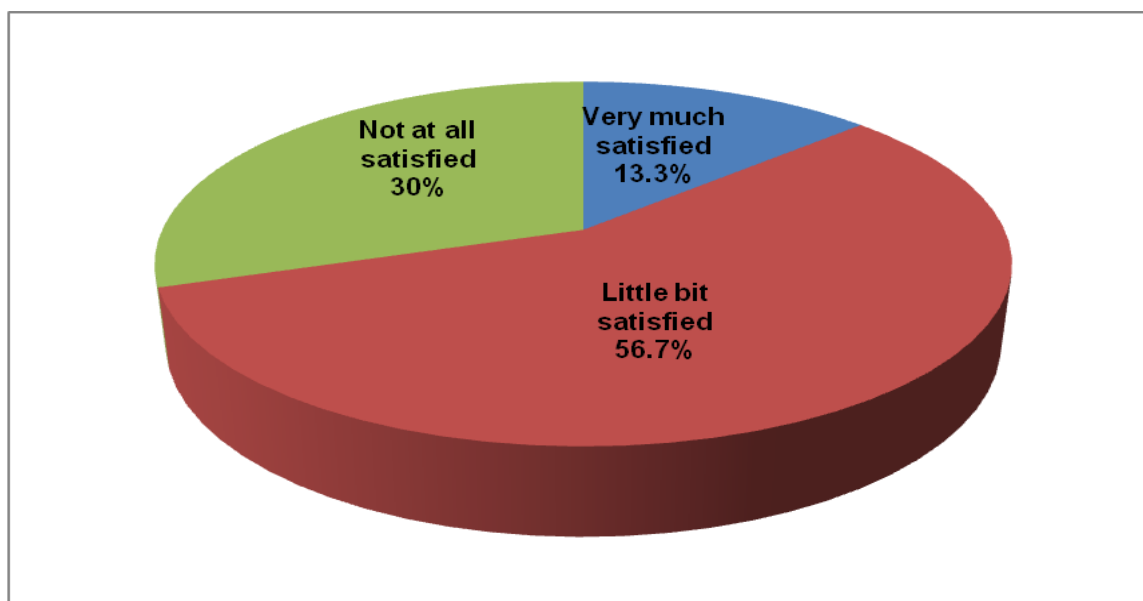


Table-14.6: Satisfaction of the niche industries with DPP scheme guidelines for promoting niche tourism products

Satisfaction level	n	%
Very much satisfied	4	13.3
Little bit satisfied	17	56.7
Not at all satisfied	9	30.0

(n= 30. It is limited to those respondents who claimed some familiarity with DPP scheme guidelines)

14.7 Evaluation of Sample Niche Tourism Projects

In accordance with the norms specified for sampling in the TOR for this study, a sample of four projects was chosen from the list of Niche Tourism Projects assisted by the Ministry of Tourism. These four projects pertain to the financial years, 2012-13, 2013-14 and 2014-15.

Table-14.7: Sample list of four niche tourism projects selected for evaluation under category “Promotion of Niche tourism products”

Year	Category	Purpose	Organization and Location
2012-13	Medical Tourism	EMCON-2012 of 14 th Annual Conference of Society at New Delhi	M/s. India For You, Holidays Pvt. Ltd., Gurgaon
2012-13	Golf Tourism	Financial Support for Indian Golf League Golf Tournament	M/s. Digraj Golf Inc., Geetanjali Enclave, New Delhi
2013-14	Golf Tourism	Sponsorship Support for Corporate Team Challenge	M/s. Sports & Leisure Worldwide, Noida
2014-15	Medical Tourism	Medical & Wellness Tourism Summit-2014	M/s. PHD Chamber of Commerce & Industry, New Delhi

The information about the experience of the respondents with the DPP scheme as well as their suggestions and visual or verbal documentation that the implementing organizations have produced was collected over phone and over emails. To the extent possible, the information was recorded in a semi-structured schedule designed especially for this purpose.

The major findings of the assessment of impact of ‘Niche Tourism’ component of the DPP scheme are as follows:

1. The amount released under the scheme was used by the Niche Tourism partners towards Food, Accommodation and Transportation.

2. The respondents reported that the assistance received from MOT under the DPP scheme comprised 6-10% of the total expenditure incurred in implementing the said 'Niche Tourism' initiative for which funds were received.
3. The leaders of all the four implementing organization rated the assistance received as 'Very Good' in terms of its usefulness in promoting the respective Niche Tourism concept.
4. The project implementing organisations would welcome if the timeliness of release of funds is improved by the Ministry of Tourism and the procedures are made simpler.
5. All of them will continue to engage and collaborate with the ministry in future too and will welcome assistance for any of the niche tourism initiatives in future.
6. The organizations suggested that increased efforts at awareness building will have a salutary effect on promoting niche tourism among domestic tourists. This can be done by showcasing niche tourism events during MOT participation in at national conferences and fairs.
7. Sightseeing and subsidized hotel rates for the delegates of the conference through tie-ups should be promoted.
8. Enhanced investment in improving niche tourism infrastructure especially in Venue improvement will be welcome
9. Identify good performing project implementing organisations and incentivize them by assisting them in relatively more projects than those whose performance is not so good.

CHAPTER-XV

IMPACT OF FINANCIAL ASSISTANCE TO THE STATES/ UNION TERRITORIES

Ministry of Tourism, Government of India provides assistance to the departments of tourism in the respective states primarily for organizing fairs and festivals, including tourism focused festivals. Assistance is also given for development and production of publicity materials. During this study, the survey teams contacted 40 officials of the state departments of tourism spread over the following states:

The offices which were contacted are as follows:

- i) Port Blair (A&N)
- ii) Patna (Bihar)
- iii) Delhi (Delhi)
- iv) Panaji (Goa)
- v) Bangalore (Karnataka)
- vi) Kochi (Kerala)
- vii) Indore (Madhya Pradesh)
- viii) Mumbai (Maharashtra)
- ix) Bhubaneshwar (Odisha)
- x) Jaipur (Rajasthan)
- xi) Chennai (Tamil Nadu)
- xii) Hyderabad (A.P. and Telangana)
- xiii) Lucknow (Uttar Pradesh)
- xiv) Kolkata (West Bengal)
- xv) Naharlagun (Arunachal Pradesh)
- xvi) Guwahati (Assam)
- xvii) Imphal (Manipur)
- xviii) Shillong (Meghalaya)
- xix) Srinagar (J&K)

The primary objective of contacting the officials of the above referred State tourism departments was to obtain information about their performance and opinion about their

performance and feedback related to assistance received mainly for fairs and festivals under the Domestic Promotion and Publicity scheme of Ministry of Tourism.

The findings of the interaction conducted with officials of State Government department are described in the following sections:

Table-15.1: Awareness of state officials about components of DPP scheme

Scheme Component	Activities undertaken
CFA for organizing fairs, festivals and tourisms related events	Organizing fairs and festivals typical to the respective area, payment for venue, on site promotion etc.
CFA for production of publicity material	Production and distribution of banners, hoardings and brochure etc.
CFA for joint advertising in print media.	Advertisements placed by a few state government tourism department in the local state specific newspapers and magazines including participation in features related to tourism, payment for placing advertorials etc.
CFA for promotion of film tourism	Awareness is low among state departments, the study did not reveal any utilization of this component by the departments contacted.

15.1 Impact of assistance received for fair/festivals under DPP



A total of 40 officials of State Tourism Departments were contacted as a sample for gauging the impact of fairs and festivals under DPP. The officials of State Tourism Departments were asked to provide their opinion on the impact of the assistance received for fairs/ festivals under DPP scheme. While

70% officials stated that the arrival of tourists is significantly increased, 25% stated that the arrival of tourists has is little bit increased due to assisted fairs and festivals. While 60% officials stated that the assisted fairs and festivals have significantly increased the knowledge among the people on the tourist attractions of the country (state) while 35% officials stated that the knowledge among the people on the tourist attractions of the country (state) is somewhat increased. 70% officials stated that the assisted fairs and festivals have significantly increased the preservice of the cultural heritage of the country while 25% officials stated that preservice of the cultural heritage of the country is somewhat increased due to assistance provided for fairs and festivals. 50% officials stated that the income generation in tourism sector in the country is significantly increased due to assistance provided to the fairs and festivals by Ministry of Tourism, while 30% officials stated that the income generation is somewhat increased due to assistance provided to fairs and festivals. 70% officials stated that the assisted fairs and festivals have significantly increased showcasing the tourism products of the country, while 25% officials stated that the assisted fairs and festivals have somewhat increased showcasing the tourism products of the country.

Overall, according to the views of the officials of the state Tourism Departments, the tourist arrival to the state, enrichment of the knowledge of tourist attractions of the state, preservice of the cultural heritage of the country, income generation in the tourism sector in the country and showcasing the tourism products of the country have been significantly increased due to financial assistance for fairs and festivals provided under DPP scheme by Ministry of Tourism.

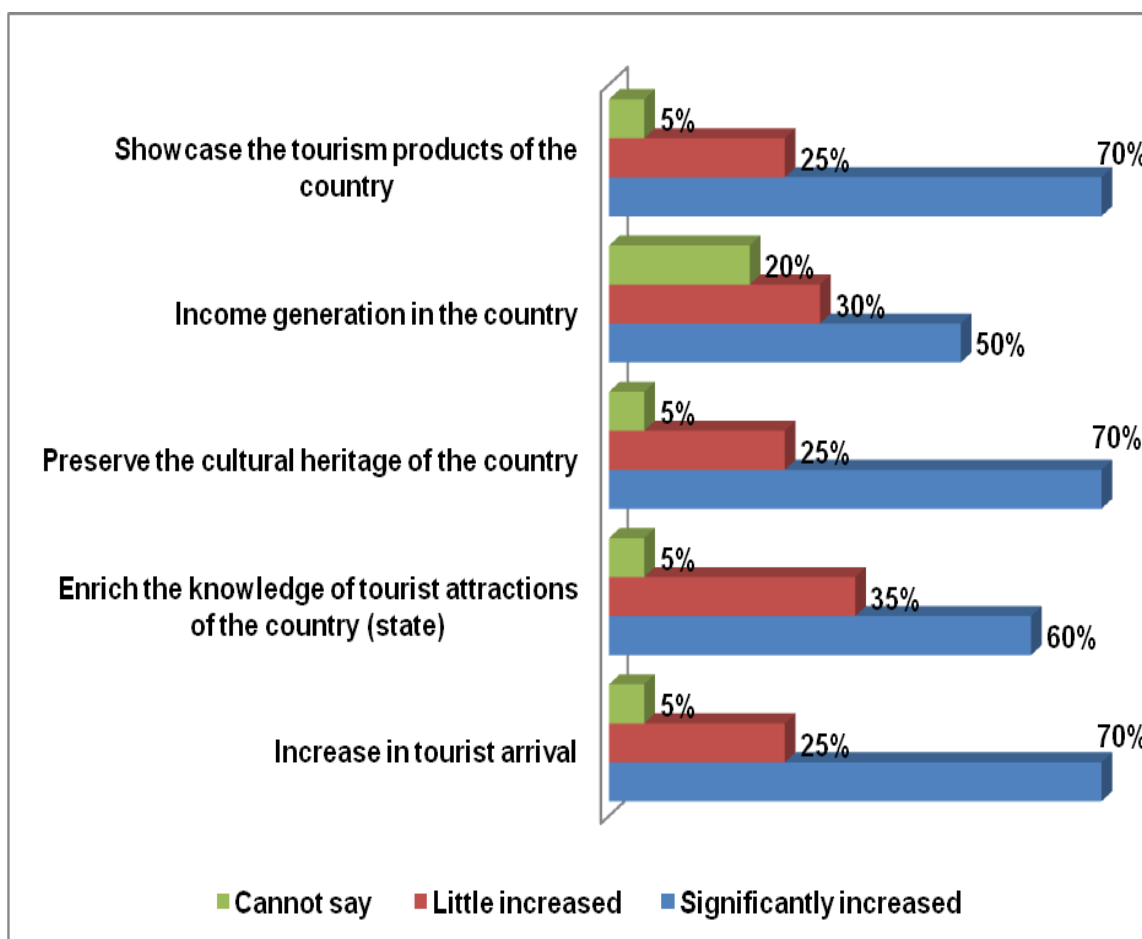
All the officials of the State Tourism Departments further viewed that the fairs/festivals to which the financial assistance have been provided were useful in promoting tourism in the state.

**Table-15.2: Perceived impact of assistance received for fair/festivals under DPP
(Number of respondents n=40 state government officials)**

Types of impacts	Significantly increased		Little increased		Not increased		Cannot say	
	n	%	n	%	n	%	n	%
Increase in tourist arrival	28	70.0	10	25.0	-	-	2	5.0

Enrich the knowledge of tourist attractions of the country (state)	24	60.0	14	35.0	-	-	2	5.0
Preserve the cultural heritage of the country	28	70.0	10	25.0	-	-	2	5.0
Income generation in the country	20	50.0	12	30.0	-	-	8	20.0
Showcase the tourism products of the country	28	70.0	10	25.0	-	-	2	5.0

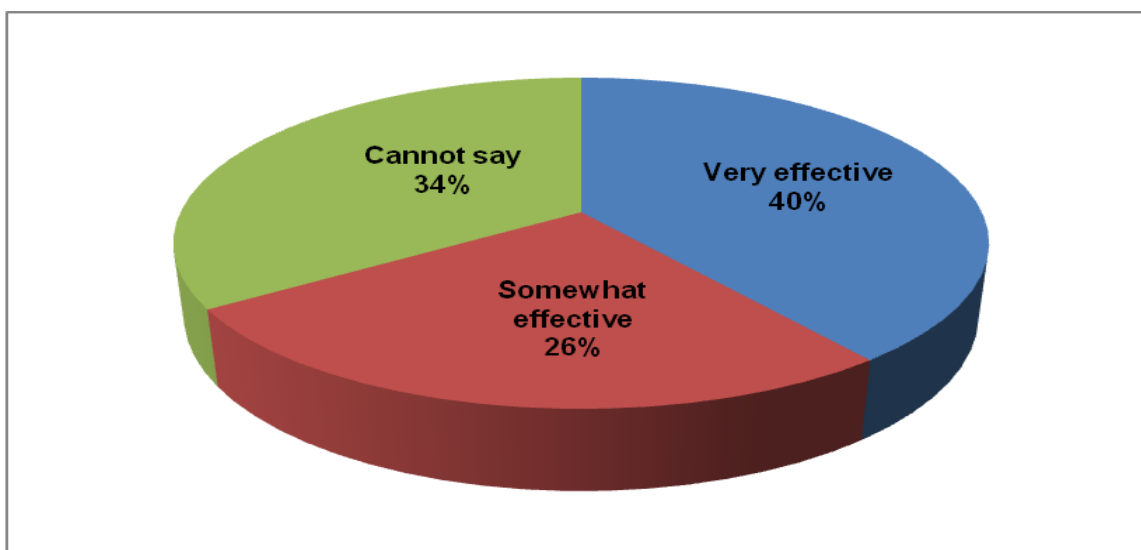
Chart-15.1: Perceived impact of assistance received for fair/festivals under DPP



All the officials of the State Tourism Departments further viewed that the fairs/festivals to which the financial assistance have been provided were useful in promoting tourism in the state.

Table-15.3: Extent to which fairs/festivals have been useful in promoting tourism in the state

Extent of usefulness	n	%
Very useful	40	100
Little useful	-	-
Not useful	-	-

Chart-15.2: Extent to which financial assistance under DPP has been effective in promoting tourism in the state

47.5% officials of the State Tourism Departments rated the timeliness of grants under DPP scheme as very good or good, while 25% rated it as average and 27.5% rated the timeliness of grants as poor or very poor. 30% officials stated the procedures under DPP scheme as good, while 55% rated it as average and 15% officials rated the procedures under DPP scheme as poor or very poor. On adequacy of grants under DPP scheme, 32.5% rated it as good, 32.5% rated it as average and 35% rated the adequacy of grants under the DPP scheme as poor or very poor.

Table-15.4: Effectiveness of DPP scheme with respect to following components

Types of impacts	Very good		Good		Average		Poor		Very Poor	
	n	%	n	%	n	%	N	%	n	%
Timeliness of grants	8	20.0	11	27.5	10	25.0	3	7.5	8	20.0
Procedures	-	-	12	30.0	22	55.0	3	7.5	3	7.5
Adequacy of grants	-	-	13	32.5	13	32.5	4	10.0	10	25.0

15.3 Level of satisfaction and suggestions

It was observed that majority (60%) of the officials of the State Tourism Department were somewhat satisfied with the DPP schemes' effectiveness in promoting domestic tourism, while 20% were very much satisfied and 20% were not at all satisfied with the DPP schemes' effectiveness in promoting domestic tourism.

Chart-15.3: Level of satisfaction of the officials with DPP scheme's effectiveness

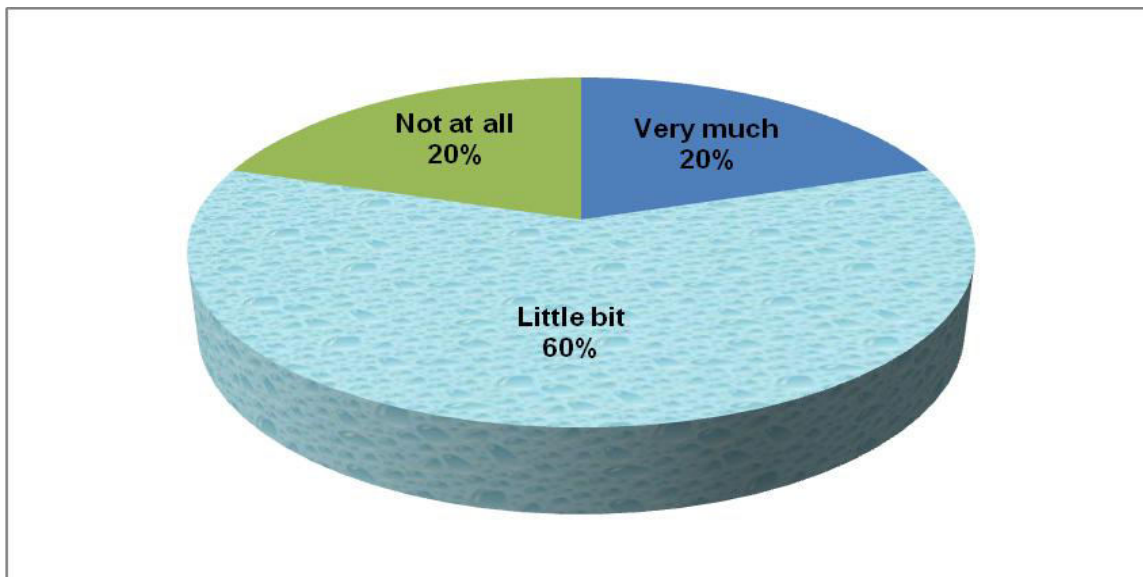


Table-15.5: Level of satisfaction of the officials with DPP scheme's effectiveness

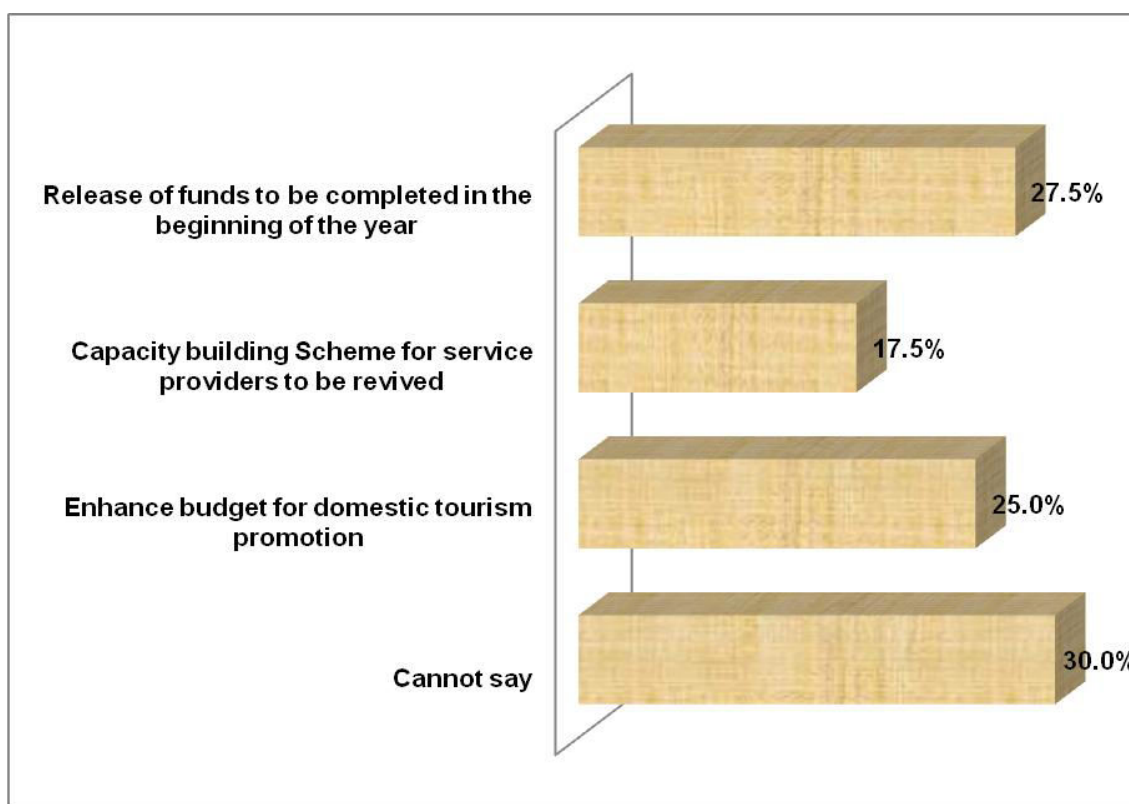
Level of satisfaction	n	%
Very much	8	20.0
Little bit	24	60.0
Not at all	8	20.0

40% officials of State Tourism Departments to continue receiving allocation under DPP scheme along existing guidelines, while majority (60%) want to continue receiving allocation under DPP scheme with some acceptable changes in the guidelines of the scheme.

Table-15.6: Willingness of state tourism departments to continue receiving allocation under DPP scheme along existing guidelines

Options	n	%
Yes	16	40.0
Acceptable with changes	24	60.0

While 27.5% officials of State Tourism Departments suggested for the release of funds in the beginning of the year, 25% suggested to enhance budget for domestic tourism promotion and 17.5% suggested for the revive of capacity building scheme for service providers.

Chart-15.4: Suggestions for changes in the guidelines/schemes/activities**Table-15.7: Suggestions for changes in the guidelines/schemes/activities**

Changes required	n	%
Enhance budget for domestic tourism promotion	10	25.0
Capacity building Scheme for service providers to be revived	7	17.5
Release of funds to be completed in the beginning of the year	11	27.5
Cannot say	12	30.0

CHAPTER-XVI

ASSESSMENT OF THE ACTIVITIES UNDERTAKEN BY DOMESTIC OFFICES

The Ministry of Tourism has five Regional offices located at Kolkata (East), Mumbai (West), Delhi (North), Chennai (South) and Guwahati (North East), which are headed by an officer of the level of Deputy Director General designated as Regional Director. Each Regional Officer (called RD Office) has sub regional officers in their jurisdiction, totaling 15 in number. The appropriate officials of 20 offices were contacted in course of this study. Their opinion and feedback was solicited as per the pre-determined and approved questionnaire.

The offices which were contacted are as follows:

- i) Port Blair (A&N)
- ii) Patna (Bihar)
- iii) Delhi (Delhi)
- iv) Panaji (Goa)
- v) Bangalore (Karnataka)- sc
- vi) Kochi (Kerala)
- vii) Indore (Madhya Pradesh)
- viii) Aurangabad (Maharashtra)
- ix) Mumbai (Maharashtra)
- x) Bhubaneshwar (Odisha)
- xi) Jaipur (Rajasthan)
- xii) Chennai (Tamil Nadu)
- xiii) Hyderabad (A.P. and Telangana)- sc
- xiv) Agra (Uttar Pradesh)
- xv) Varanasi (Uttar Pradesh)
- xvi) Kolkata (West Bengal)
- xvii) Naharlagun (Arunachal Pradesh)
- xviii) Guwahati (Assam)
- xix) Imphal (Manipur)
- xx) Shillong (Meghalaya)

The primary objective of contacting the officials of the above referred India Tourism offices was to obtain information about their performance and opinion about their performance and feedback related to two schemes for which Ministry of Tourism provides funds under the head of Domestic Promotion and Publicity:

- i) Tourism Promotion Grant
- ii) Window Display Scheme

The findings of the interaction conducted with officials of India Tourism offices are described in the following sections:

16.1 Main activities undertaken by India Tourism Domestic offices

The main activities undertaken by India Tourism Domestic Offices with the funds received under Tourism Promotion Grant and Window Display Scheme are given in table 16.1.



Activities undertaken by India Tourism Domestic Offices under Tourism Promotion Grant were found to be trade meetings with different stakeholders, distribution of literature and posters, celebration of World Tourism Day, official tour and travel expenses for attending meetings, celebration of Hindi Divas, Swachh Bharat Campaign

at main tourist spots of the respective cities, advertisements in local media, participation in seminar, workshop, travel mart, travel fair, helping tourists resolve their tourism related complaints, etc.

Activities undertaken by India Tourism Domestic Offices under Window Display were found to be producing laminated posters for display at different tourist places, producing laminated posters for distributing to stakeholders, production and setting up of hoardings, etc.

Table-16.1: Main activities undertaken by India Tourism Domestic offices

Scheme Component	Activities undertaken
i) Tourism Promotion Grant	<ol style="list-style-type: none"> 1. Trade meetings with tour operators, hoteliers, travel agents 2. Distribution of literature and posters 3. Celebration of World Tourism Day 4. Official tour and travel expenses for attending meetings 5. Celebration of Hindi Divas 6. Swachh Bharat Campaign at main tourist spots of the respective cities 7. Advertisements in local media 8. Participation in seminar, workshop, travel mart, travel fair 9. Helping tourists resolve their tourism related complaints
ii) Window Display	<ol style="list-style-type: none"> 1. Producing laminated posters for display at different tourist places 2. Producing laminated posters for distributing to Hoteliers, Travel Agents. Tour Operators, etc. 3. Production and setting up of hoardings

16.2 Major facilitation services provided to the domestic tourists

The major facilitation services provided to the domestic tourists by Indian Tourism Domestic Offices are:

1. Distribution of brochures
2. Providing information at the counters
3. Dissemination of information regarding tourist places in India
4. Assisting the tourists in planning their respective travel itineraries
5. Providing tourist maps

16.3 Rating of usefulness of Tourism Promotion Grant

According to the opinion of the India Tourism Domestic officials, there is great usefulness of tourism promotion grant for meeting the promotional and marketing objectives of India Tourism Domestic Offices. Most (85%) of the India Tourism Domestic officials rated the usefulness of tourism promotional grant as very good, while 10% rated it as good for meeting the promotional and marketing objectives of India Tourism Domestic Offices.

Chart-16.1: Rating of usefulness of Tourism Promotion Grant

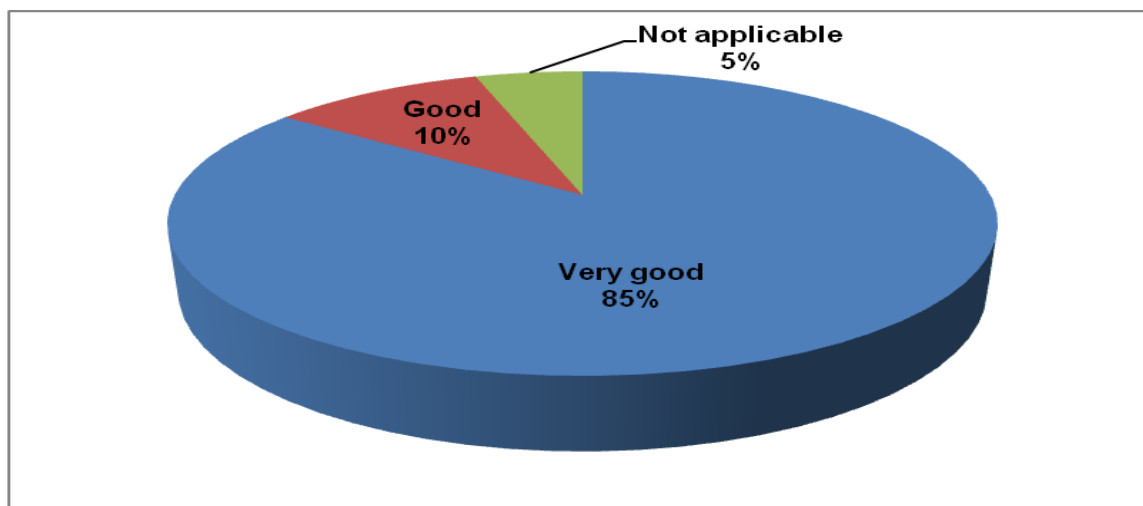


Table-16.2: Rating of usefulness of Tourism Promotion Grant

Rating	N	%
Very good	34	85.0
Good	4	10.0
Not applicable	2	5.0

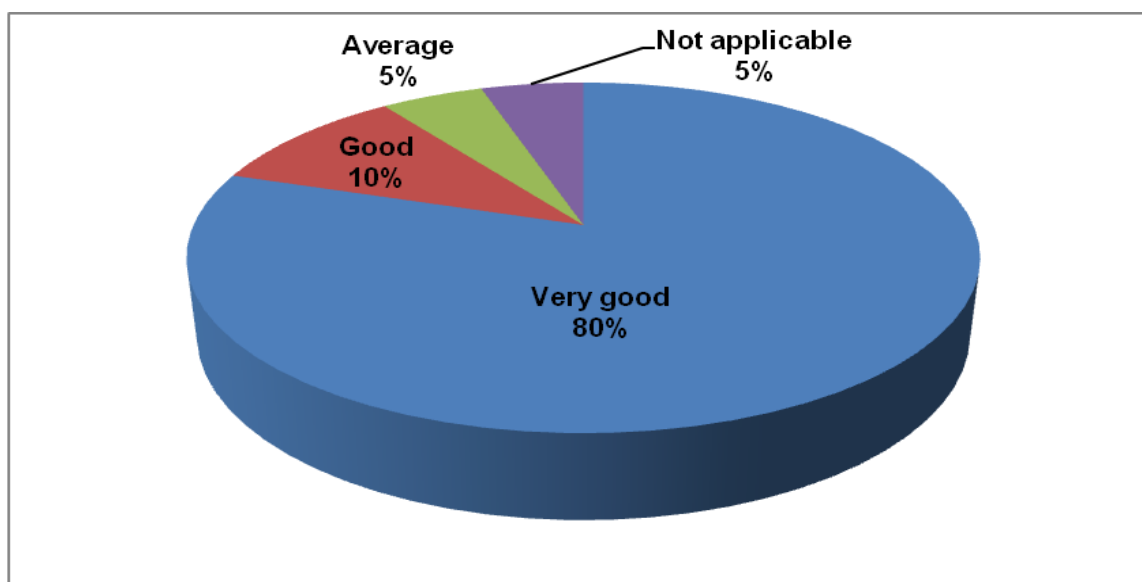
16.4 Rating of usefulness of Window Display

The study also observed that the usefulness of window display for meeting the promotional and marketing objectives of India Tourism Domestic Offices is high. While 80% of the India Tourism Domestic officials rated the usefulness of window display as very good, 10% rated it as good and 5% rated it as average for meeting the promotional and marketing objectives of India Tourism Domestic Offices.

Table-16.3: Rating of usefulness of Window Display

Rating	N	%
Very good	32	80.0
Good	4	10.0
Average	2	5.0
Not applicable	2	5.0

Chart-16.2: Rating of usefulness of Window Display



16.5 Willingness to continue receiving allocation under DPP scheme

When asked to the officials of India Tourism Domestic Offices whether they would like to continue to receive allocation under Tourism Promotion Grant and Window Display Scheme,

Table-16.4: Willingness to continue receiving allocation under DPP scheme along existing guidelines

Options	N	%
Yes	38	95.0
Acceptable with changes	2	5.0

16.6 Changes required in the guidelines/schemes/activities

When asked to the India Tourism Domestic Officials to provide suggestions for changes or modifications in the guidelines/schemes/activities undertaken under Tourism Promotion Grant and Window Display, major suggestions received from the officials are, enhancement in delegated financial powers for approving expenditure from the current levels, enhancement of budget for domestic tourism promotion, revive of capacity building scheme for service providers, and release of funds under the scheme in the beginning of the year.

Chart-16.3: Changes required in the guidelines/schemes/activities undertaken under Tourism Promotion Grant and Window Display

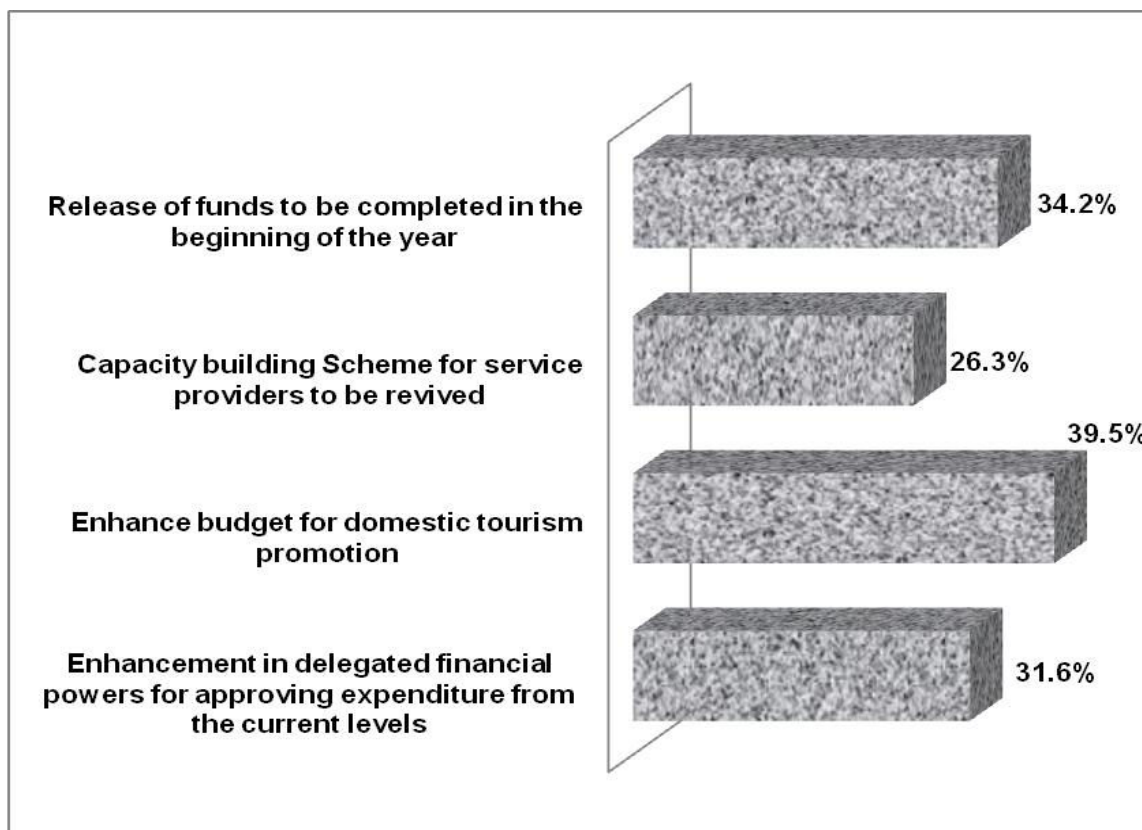


Table-16.5: List of changes required in the guidelines/schemes/activities undertaken under Tourism Promotion Grant and Window Display

Changes required	N	%
Enhancement in delegated financial powers for approving expenditure from the current levels	12	31.6
Enhance budget for domestic tourism promotion	15	39.5
Capacity building Scheme for service providers to be revived	10	26.3
Release of funds to be completed in the beginning of the year	13	34.2

16.7 Domestic Office guided the tourists for taking any domestic tour

The study tried to find out whether any promotional activity or window display by India Tourism Domestic Office guided the tourists for taking any domestic tour in the country. It was observed that promotional activity or window display by India Tourism Domestic Office guided few (3.7%) tourists for taking any domestic tour in the country.

Table-16.6: Whether any promotional activity or window display by India Tourism Domestic Office guided the tourists for taking any domestic tour in the country

Options	n	%
Yes	610	3.7
No	15671	96.3

The tourists who reported that promotional activity or window display by India Tourism Domestic Office guided the tourists for taking any domestic tour in the country, most of them said that they have got necessary information on the place/ event/ festival/ fair from the India Tourism Domestic Office for their tourist visit.

16.8 Usefulness of the activities of India Tourism domestic offices

When the study tried to know the awareness level of the role of India Tourism domestic offices, 23.1% hoteliers, 28.1% tour operators, 19.5% travel agents and 27.2% tour transport operators are fully aware of the role of India Tourism domestic offices, while 52% hoteliers, 57.4% tour operators, 59.8% travel agents and 55.9% tour transport operators are little aware of the role of India Tourism domestic offices. Also, 24.9%

hoteliers, 14.5% tour operators, 20.7% travel agents and 16.9% tour transport operators are not aware of the role of India Tourism domestic offices.

Chart-16.4: Stakeholders aware of the role of India Tourism domestic offices

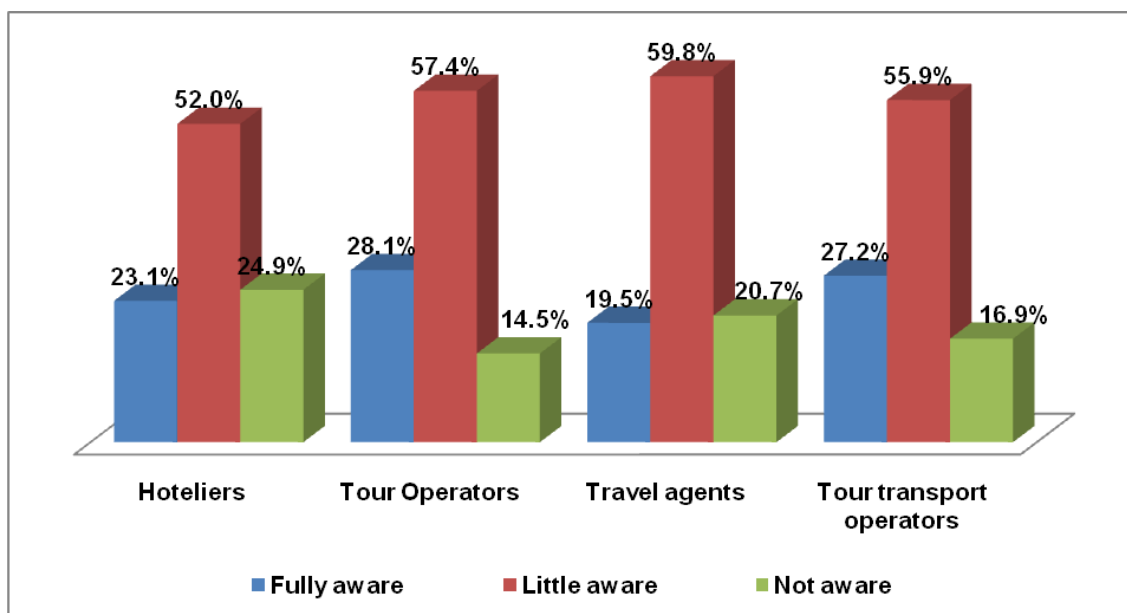


Table-16.7: Stakeholders aware of the role of India Tourism domestic offices

Opinion	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
Fully aware	63	23.1	72	28.1	50	19.5	69	27.2
Little aware	142	52.0	147	57.4	153	59.8	142	55.9
Not aware	68	24.9	37	14.5	53	20.7	43	16.9

The hoteliers, tour operators, travel agents and tour transport operators who were aware of the role of India Tourism Domestic Offices, were further asked about the usefulness of the activities of India Tourism Domestic Offices. In response, 9.3 hoteliers, 12.3% tour operators, 15.3% travel agents and 16.6% tour transport operators opined that the activities of the India Tourism Domestic Offices are very useful; while 56.5% hoteliers, 57.1% tour operators, 47.9% travel agents and 45.5% tour transport operators opined that the activities of the India Tourism Domestic Offices are somewhat useful; and 20.5% hoteliers, 21.9% tour operators, 18.5% travel agents and 25.6% tour transport operators said that the activities of the India Tourism Domestic Office are not useful. 13.7% hoteliers, 8.7% tour operators, 19.9% travel agents and 12.3% tour

transport operators said that they cannot say whether the activities of the India Tourism Domestic Offices are useful or not.

Chart-16.5: Opinion of stakeholders on the usefulness of the activities of India Tourism domestic offices

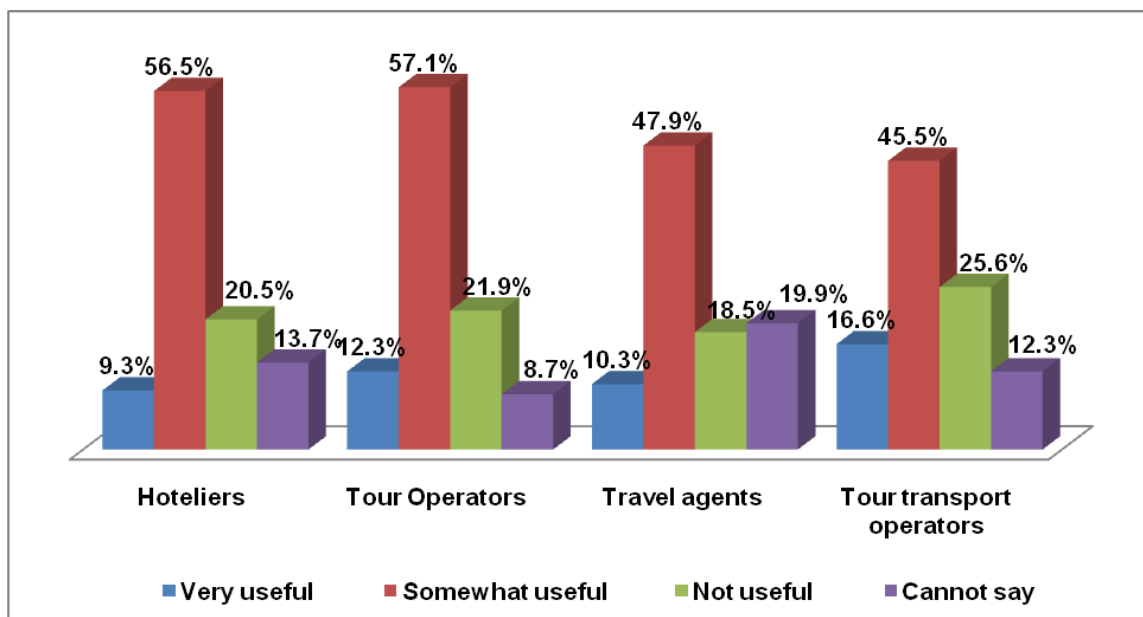


Table-16.8: Opinion of stakeholders on the usefulness of the activities of India Tourism domestic offices

Opinion	Hoteliers		Tour Operators		Travel agents		Tour transport operators	
	n	%	n	%	n	%	n	%
Very useful	19	9.3	27	12.3	21	10.3	35	16.6
Somewhat useful	116	56.5	125	57.1	101	47.9	96	45.5
Not useful	42	20.5	48	21.9	39	18.5	54	25.6
Cannot say	28	13.7	19	8.7	42	19.9	26	12.3

16.9 Utilization of activities of India Tourism Domestic Offices

The study observed that the stakeholders have hardly utilized the activities of India Tourism Domestic Offices in their business. Few stakeholders have collected necessary information from the India Tourism Domestic Offices to use in their business.

CHAPTER-XVII

ANALYTICAL OUTCOMES IN TERMS OF NEW CAMPAIGNS, PROMOTIONAL SOURCES AND PRODUCTS BASED ON SURVEYS ALONGWITH SUGGESTIONS FOR CHANGES/ MODIFICATIONS IN THE GUIDELINES/ SCHEMES/ ACTIVITIES

The analysis of the findings of the study was arrived at based on the outcomes of the general survey of different categories of respondents as specified in the TOR coupled with the results and evaluation of the sample of projects identified using the sample framework in accordance with the guidelines specified in the TOR. The analysis of the qualitative and quantitative data obtained during the study leads us to the following analytical outcomes regarding new campaigns, promotional sources and products based on surveys:

17.1 Analysis pertaining to New Campaigns

The findings of the survey of different categories of respondents indicate that the 'Atithi Devo Bhavah' campaign enjoys a high unaided recall among all categories of respondents and a significant proportion of the respondents also acknowledged its impact on causing a positive change in attitude towards welcome and behaviour towards tourists among the target audience. The campaign has also been able to promote tourists interest and actual travel to domestic tourist destinations. The findings of the surveys documented in the earlier chapters support this conclusion. However, the recall rate of the Atithi Devo Bhavah campaigns of 2009-10 which featured Shri Amir Khan was much higher as compared to the campaigns from 2011-12 to 2014-15 which did not feature him, Therefore, the Ministry must adopt the strategy of engaging a credible and popular celebrity along with consistent and sharply focused direct messaging to continue recording successes in its campaigns. The '*Atithi Devo Bhavah*' campaign should be continued and strengthened along the same lines to reinforce the messaging and to generate awareness among those who still are low on awareness.

The two destination tourism campaigns viz. that promoting North East India and Jammu & Kashmir have also been successful in improving the awareness and generating a preference and actual tourist flow towards these two destinations in a positive manner. It is suggested that not only the campaign promoting these two destinations should be continued on the same lines but in order to diversify the domestic tourist inflow, certain new destinations like Karnataka (Heritage sites), Odisha (Beach as well as cultural tourism), Tamilnadu (Cultural Tourism), Uttarakhand (Religious as well as adventure tourism) need to be introduced to leverage the positive impact that destination tourism campaigns seem to be creating so far.

17.2 Analysis pertaining to promotional sources

An analysis of the findings regarding promotional sources discussed in earlier chapters brings out the fact that Television must continue to be one of the prominent media of domestic promotion in the years to come.

Even though the survey results show lower numbers which may be due to the fact that social media and online campaigns have been introduced very recently, the investment in online promotion and social media needs to be stepped up as it is being increasingly used by tourists and travel and trade professionals to seek and verify information and for doing travel bookings. The portals which have a component of Peer-to-Peer (P2P) review and ratings should definitely be used by the Ministry for communicating its messages especially those for promoting destination tourism. Advertising through Google Adwords, Search Engine Optimisation (SEO), advertising on Facebook, Using LinkedIn and on travel e-commerce portals is a must. Travel Information portals like Tripadvisor and Lonely Planet should be exploited. The website of India Tourism, Incredible India and Ministry of Tourism should be supplemented with adequate content about destinations so that the potential and actual domestic tourists can access the information at the click of a mouse and on the go. For leveraging Information Technology and Social Media for promotion of the tourism destinations and products of the country, new Social Media Accounts for the Ministry have recently been opened on Instagram, Periscope, Vimeo, Pinterest and LinkedIn, in addition to the existing accounts on Google+, Youtube, Facebook, and Twitter. These Social Media accounts of the Ministry of Tourism are being regularly enriched with

informative posts and updates. Some of the major Social Media promotions undertaken during 2016-17 included:

- ✓ Collaboration with the Rashtrapati Bhavan for online promotion of Rashtrapati Bhavan as a destination for tourists visiting Delhi.
- ✓ Promotion of International Day of Yoga.
- ✓ Promotion of “National Tourism Awards 2014-15”, “Bharat Parv 2016”, “BRICS Convention on Tourism 2016”, “Incredible India Tourism Investors Summit 2016” (inaugural function of the Summit was covered live on Periscope), World Tourism Day 2016, International Buddhist Conclave 2016, India’s participation in the World Travel Market 2016 (WTM), London as the Premium Partner Country (Live coverage of the inauguration of WTM and India Pavilion on Facebook Live), International Tourism Mart, Manipur, etc..
- ✓ Achievements in the tourism sector, such as rise in the Travel & Tourism Competitive Index of the World Economic Forum, have been amplified through the Social Media.
- ✓ Workshop on Social Media Management organized in Delhi in September 2016 to sensitise State Governments, Travel Trade and officials of the Ministry on effectiveness of the marketing destination through social media platforms.
- ✓ A Workshop on Social Media Management was organized in Delhi on 7th September 2016 to sensitise State Governments, Travel Trade and officials of the Ministry on effectiveness of the marketing destination through social media platforms. The Workshop included Sessions conducted by industry experts from Google and Twitter

The survey suggests that the impact of Billboards and Hoardings has so far been less. This may be due to the fact that this media has been used to a lesser degree and that too only recently. Broadly the same analysis holds true for radio.

The following domestic **outdoor campaigns** were undertaken in 2016-17:

- ✓ Outdoor Branding undertaken at Delhi and Mumbai Airports for one month in September / October 2016 *and* from December 2016 for a two month period.
- ✓ Outdoor Advertising undertaken on the Yamuna Express and DND Flyway for one month in December 2016.

- ✓ Outdoor Advertising undertaken on hoardings, bus panels, airport taxis / cabs, bus shelters, digital display boards, display boards at railway stations, metro rail display boards, tram wraps, etc. in Ahmedabad, Ajmer, Bengaluru, Bhopal, Chandigarh, Chennai, Delhi, Guntur, Guwahati, Gwalior, Indore, Jaipur, Jhansi, Kochi, Kolkata, Madurai, Mangalore, Mumbai, Nagpur, Patna, Pune, Tirupati, Vishakapatnam, during February / March 2017.

Adequate proportion of tourists surveyed did suggest that they access print media for information and that includes brochures and other promotional material of the Ministry of Tourism. Adequate proportion of tourists surveyed did suggest that they access print media for information and that includes brochures and other promotional material of the Ministry of Tourism.

17.3 Analysis pertaining to products

The analysis of the success of destination campaigns of J&K and of North East suggests that new destinations and tourism circuits should be considered and promotional campaigns on Television, Radio and on Digital Media need to be taken up. The relative success of participation in SATTE, TTF and in ITM suggests that the investment needs to be increased for these three fairs.

The support to State Government departments for state specific fairs and festivals was found to be less than sufficient. The same was found to be true for India Tourism offices. These components of DPP scheme are useful and need to be supported by higher allocations.

There is a need to bring synergy between Destination Tourism and Niche Tourism in order to utilize the mutual reinforcing effect. A separate study for analyzing the same may be commissioned with the specific aim of bringing out the scope of such synergies all over India. This will maximize the impact of the promotion and optimize the promotion spend.

17.4 Analysis pertaining to modifications in guidelines/schemes/ activities

The analysis of the findings of the study was arrived at based on the outcomes of the general survey of different categories of respondents as specified in the

TOR coupled with the results and evaluation of the sample of projects identified using the sample framework in accordance with the guidelines specified in the TOR. The analysis of the qualitative and quantitative data obtained during the study leads us to the following outcomes and suggestions for changes in the guidelines/schemes and activities:

1. Source of information and media for different target audience:

The Ministry has been running and supporting promotion campaigns in different media like T.V., radio, newspapers, magazines, internet, social media, website and outdoor media etc. The outcomes of the study suggest that different audience of the communication campaigns have different media preferences. The impact, reach and effectiveness of the communication campaigns can be enhanced in terms of recall and inducing behaviour change if the choice of communication media is in accordance with the media preferences. The messaging and campaign scheduling will have to be accordingly configured.

The tourists as a category prefer internet, websites including travel portals followed by television and then newspapers among the media even as a number of them source information through personal referrals.

The members of the travel, tourism and hospitality trade rate newspaper and magazines as an important source of exposure to tourism communication. This is followed by internet and then television. The Ministry can draw its lessons from these findings and rework its budget allocations for different media as well as the content of the campaign messages that will be communicated through different media. In addition to that engagement of the audience with the messages by organising contests and games around their information search activities will contribute to generating enough buzz and enable peer-to-peer (P2P) communication when it comes to tourism campaigns and information.

2. Success of the communication campaigns and projects

The Promotion and Publicity campaigns viz. Atithi Devo Bhavah, North East and Jammu & Kashmir were popular and were recalled by the target audience i.e. tourists, locals, and trade members. The most recalled campaign was Atithi

Devo Bhavah, with recall touching close to 60 percent of the tourist audience. The recall figures for other campaign were small as compared to Atithi Devo Bhavah. The impact on behaviour change and follow up actions taken by audience who were exposed to campaigns is also significantly high in case of Atithi Devo Bhavah when compared to any of the other campaigns.

The Ministry must continue with a adopting the strategy of a credible and popular celebrity along with consist and sharply focused direct messaging to continue recording successes in its campaigns.

3. The impact of the campaigns

The campaigns have had an impact not only at an individual level in inducing a positive behaviour change, increasing the knowledge and inducing a travel/tour to the advertised destinations but also at a group level where, the positive behaviour change has happened to some extent with people recalling the exact behaviour change, be it in their attitude towards tourists or keeping the locations clean. In addition, the tourist traffic has increased, economy has improved and spending by tourists has got enhanced.

One point to note here is an area of improvement. Majority of local residents felt that their attitude has not changed towards tourists due to the campaign. Ministry should recognize this and not only make changes in the campaign because attitude change requires a multi-pronged communication approach especially by personally engaging the locals rather than depend merely on a distant television campaign.

4. The impact of supporting events

The study indicates that the supporting events do lead to active engagement of the employees as well as tourists with the cause of promotion of domestic tourism. The Ministry should broad base these events and also provide enhanced funding to India Tourism offices and State Government departments to take up supporting events in much larger numbers than at present.

5. Outcomes related to fairs and festivals

The fairs and festivals emerged as a significant influencer on the knowledge and behaviour of the different stakeholders including tourists and locals. However, these have largely remained a domain of State Tourism departments. We recommend that increased Central funding for promoting Fairs and Festivals at an all India level must be provided and Festival Tourism be encouraged. The Ministry should develop communication around the fairs and festivals all over India and execute an integrated campaign in the days to come. This would open up an entirely new segment of tourists and tourism wherein not only will there be an experiential travel but a heightened spending during travel and tours.

Fair and Festivals were universally found to be a very effective means of improving domestic tourism. These need to be encouraged and focused on. Metrics must be identified and fixed for each of the fair/festival. There should be a regular review of each festival's performance against the metrics so identified.

6. Niche Tourism preferences

Adventure, golf, medical and wellness tourism should be provided with extra support and funds since as per this study, these are finding a lot of traction among the tourists. Those organisations who have availed of support from MOT have rated their experience as good or very good but have also stated that the amount of assistance should be increased and procedures be made easier than they are at present. More efforts awareness generation and publicity of events and partners will go a long way in improving prospects of niche tourism.

Even as the interviews with the trade partners and government officials which were carried out during this study suggested that Film Tourism must be encouraged as it has huge prospects in all parts of India, the study also finds that the current awareness levels about the same are very low and this is probably the reason that it has not yet been taken seriously by stakeholders. It is suggested that there should be special provision made to promote Film Tourism and the communication and orientation should happen at all levels and all sections of the travel and tourism industry.

7. The importance of printed publicity material and collaterals

Like in the case of media, there are different preferences of different stakeholders towards printed material and collaterals. The trade partners, the industry associations, the state tourism departments prefer the printed publicity material and collaterals whereas the tourists and locals did not prefer such material. There is a need to review the content and design of the printed material to make it more friendly and attractive for tourists so that the final audience is motivated to use it.

ANNEXURE
STUDY QUESTIONNAIRES

**GOVERNMENT OF INDIA
MINISTRY OF TOURISM
STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND
PUBLICITY (DPP)
TOURIST QUESTIONNAIRE**

Sl. No.

1	Tourist Particulars			
1.1	Location:		1.2	State:
1.3	Are you a tourist?	Yes-1	No-2	
1.4	Name:			
1.5	Address:			
1.6	Phone No.:			
1.7	Gender:	Male-1	Female-2	
1.8	Age (in completed years):			
	Below 25 years-1	25 to 35 years-2	36 to 50 years-3	
	51 to 65 years-4	Above 65 years-5		
1.9	Marital status:	Unmarried-1	Married-2	
1.10	Education :	Below graduate-1	Graduate-2	Post Graduate & above-3
1.11	Occupation:	Student-1	Service-2	Business-3
		Homemaker-4	Retired-5	Others (Specify.....)-6
1.12	Annual income:	Below Rs. 1 lakh-1	1 lakh to 2 lakh-2	Above 2 lakh to 5 lakh-3
		Above 5 lakh to 10 lakh-4	Above 10 lakh-5	

2	Medium of awareness			
2.1	What have been the sources of information for your domestic tours in recent past?			
	Ad in print media-1	Ad in electronic media-2	Website/Internet-3	
	Information Centre(s)-4	Publicity material of Ministry of Tourism/State Tourism-5		
	Travel agency & Tour operator-6	Friends/Relatives-7	Mobile apps-8	
	Bill board/hoarding-9	Other (specify.....)-10		
2.2	Which campaign of Ministry of Tourism have you seen? (Put \sqrt mark)			
	Sl. No.	Campaign		
	1	Atithi Devo Bhavah		
	3	North Eastern States Campaign		
	4	Jammu & Kashmir Campaign		
2.3	Where did you see the campaign?			
	Major media category-1		Minor media component-2	
	a. Print	b. Electronic	c. Online	
	1. Newspaper	1. TV	1. Internet	
	2. Magazines	2. Radio	2. Website	
	3. Information brochure of Ministry of Tourism	3. Promotional CD	3. Promotional e-mail	
	4. Information brochure of State Government	4. Movies	4. Social media	
		5. Bill board		

STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND PUBLICITY (DPP)

3	Impact of promotion campaign	
3.1	Has the campaign of Ministry of Tourism motivated you to undertake: Travel to North Eastern India-1 Travel to Jammu & Kashmir-2 Travel anywhere else in India-3 No- 4	
3.2	Has the campaign of Ministry of Tourism motivated you to consider the following in your future travel plans: Travel to North Eastern India-1 Travel to Jammu & Kashmir-2 Travel anywhere else in India-3 No- 4	
3.3	Should Ministry of Tourism take up more promotional campaigns in addition to North Eastern States Campaign and Jammu & Kashmir Campaign? Yes-1 No-2	
3.4	If Yes, Why?	
3.5	Has any fair / festival motivated you to undertake a tourist visit within India? Yes-1 No-2	
3.6	If Yes, which fairs / festivals motivated you to undertake a tourist visit within India?	
3.7	Which fairs / festivals can motivate you to undertake a tourist visit within India?	
3.8	Have you seen any advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism? Yes-1 No-2	
3.9	If Yes, in your opinion how have those motivated you to undertake a tourist visit?	
3.10	What kind of information you will want to see in advertisements and advertorials of Ministry of Tourism? a Advertisements on TV b Advertisements in Newspaper c Online d In printed publicity material	
3.11	In your opinion, what is the effectiveness of printed publicity material and collaterals published by MOT towards promotion of tourism in the country? Very effective-1 Less effective-2 Not effective-3 Cannot say-4	
3.12	Has any promotional activity or window display by India Tourism Domestic Office guided you for taking any domestic tour in the country? Yes-1 No-2	
3.13	If Yes, how?	

4	Preferences	
4.1	What are your preferred sources of information? TV-1 Radio-2 Newspaper-3 Magazine-4 Internet-5 Social media-6 Mobile apps-7 Other (specify.....)-8	
4.2	In your opinion, which is the best media for giving tourism advertisement? TV-1 Radio-2 Newspaper-3 Magazine-4 Internet-5 Social media-6 Mobile apps-7 Other (specify.....)-8	
4.3	What would you like to know from the campaigns of Ministry of Tourism? Tourism resources of the country-1 Initiatives of Ministry of Tourism-2 Tourism projects of Ministry of Tourism-3 Information on tourist places-4 Information on tourism events/fairs and festivals-5 Any other (specify.....)-6	

Name of the Interviewer:

Date of interview:

GOVERNMENT OF INDIA
MINISTRY OF TOURISM
STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND
PUBLICITY (DPP)
LOCAL RESIDENT QUESTIONNAIRE

Sl. No.

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1	Resident Particulars			
1.1	Location:		1.2	State:
1.3	Are you a local resident?	Yes-1	No-2	
1.4	Name:			
1.5	Address:			
1.6	Phone No.:			
1.7	Gender:	Male-1	Female-2	
1.8	Age (in completed years):	Below 25 years-1	25 to 35 years-2	36 to 50 years-3
		51 to 65 years-4	Above 65 years-5	
1.9	Marital status:	Unmarried-1	Married-2	
1.10	Education :	Below graduate-1	Graduate-2	Post Graduate & above-3
1.11	Occupation:	Student-1	Service-2	Business-3
		Homemaker-4	Retired-5	Others (Specify.....)-6
1.12	Annual income:	Below Rs. 1 lakh-1	1 lakh to 2 lakh-2	Above 2 lakh to 5 lakh-3
		Above 5 lakh to 10 lakh-4	Above 10 lakh-5	

2	Medium of awareness			
2.1	Which campaign of Ministry of Tourism have you seen? (Put \sqrt mark)			
	Sl. No.	Campaign		
	1	Atithi Devo Bhavah		
	3	North Eastern States Campaign		
	4	Jammu & Kashmir Campaign		
2.2	Where did you see the campaign?			
	Major media category-1		Minor media component-2	
	a. Print	b. Electronic	c. Online	
	1. Newspaper	1. TV	1. Internet	
	2. Magazines	2. Radio	2. Website	
	3. Information brochure of Ministry of Tourism	3. Promotional CD	3. Promotional e-mail	
	4. Information brochure of State Government	4. Movies	4. Social media	
		5. Bill board		

3	Impact of promotion campaign			
3.1	Has Atithi Devo Bhavah campaign changed your attitude?	Yes-1	No-2	
3.2	If Yes, how?			
3.3	Do you feel that there is an improvement in the following due to Atithi Devo Bhavah campaign?			
	Significantly increased-1	Little increased-2	Not increased-3	Cannot say-4
	a	Inculcation of good habits in local residents		
	b	Sensitizing local population for showing good behaviour towards tourists		
	c	Cleanliness of tourist places		
	d	Safety and security		

STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND PUBLICITY (DPP)

3.4	How has tourism campaigns benefitted your area? (Put \surd mark)	
	a	Increase in jobs
	b	Tourist arrivals have increased
	c	The areas from which domestic tourists come have increased
	d	The attitudes of locals become positive
e	Any other (specify.....)	
3.5	Has the campaign of Ministry of Tourism motivated you to undertake: Travel to North Eastern India-1 Travel to Jammu & Kashmir-2 Travel anywhere else in India-3 No- 4	
3.6	Has the campaign of Ministry of Tourism motivated you to consider the following in your future travel plans: Travel to North Eastern India-1 Travel to Jammu & Kashmir-2 Travel anywhere else in India-3 No- 4	
3.7	Should Ministry of Tourism take up more promotional campaigns in addition to North Eastern States Campaign and Jammu & Kashmir Campaign? Yes-1 No-2	
3.8	If Yes, Why?	
3.9	Has any fair / festival motivated you to undertake a tourist visit within India? Yes-1 No-2	
3.10	If Yes, which fairs / festivals motivated you to undertake a tourist visit within India?	
3.11	Which fairs / festivals can motivate you to undertake a tourist visit within India?	
3.12	Have you seen any advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism? Yes-1 No-2	
3.13	If Yes, in your opinion how have those motivated you to undertake a tourist visit?	
3.14	What kind of information you will want to see in advertisements and advertorials of Ministry of Tourism?	
	a	Advertisements on TV
	b	Advertisements in Newspaper
	c	Online
d	In printed publicity material	
3.15	In your opinion, what is the effectiveness of printed publicity material and collaterals published by MOT towards promotion of tourism in the country? Very effective-1 Less effective-2 Not effective-3 Cannot say-4	

4	Preferences
4.1	What are your preferred sources of information? TV-1 Radio-2 Newspaper-3 Magazine-4 Internet-5 Social media-6 Mobile apps-7 Other (specify.....)-8
4.2	In your opinion, which is the best media for giving tourism advertisement? TV-1 Radio-2 Newspaper-3 Magazine-4 Internet-5 Social media-6 Mobile apps-7 Other (specify.....)-8
4.3	What would you like to know from the campaigns of Ministry of Tourism? Tourism resources of the country-1 Initiatives of Ministry of Tourism-2 Tourism projects of Ministry of Tourism-3 Information on tourist places-4 Information on tourism events/fairs and festivals-5 Any other (specify.....)-6

Name of the Interviewer:

Date of interview:

**GOVERNMENT OF INDIA
MINISTRY OF TOURISM
STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND
PUBLICITY (DPP)
HOTELIER QUESTIONNAIRE**

Sl. No.

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1	Hotel Particulars			
1.1	Location:		1.2	State:
1.3	Name of the hotel:			
1.4	Address:			
1.5	Phone No.:			
1.6	Name & designation of the respondent:			
1.7	Annual income:	1 lakh to 2 lakh-1	Above 2 lakh to 5 lakh-2	
		Above 5 lakh to 10 lakh-3	Above 10 lakh-4	

2	Impact of promotion campaign			
2.1	Do you feel that there is an improvement in the following area due to different campaign by Ministry of Tourism? Significantly increased-1 Little increased-2 Not increased-3 Cannot say-4			
		1. Importance of tourism		
		2. Increase in tourist arrival		
		3. Knowledge of tourist place		
		4. Awareness on hospitality		
		5. Income generation		
		6. Cleanliness of tourist places		
2.2	Do you feel that there is an improvement in the following due to Atithi Devo Bhavah campaign? Significantly increased-1 Little increased-2 Not increased-3 Cannot say-4			
	a	Inculcation of good habits in local residents		
	b	Sensitizing local population for showing good behaviour towards tourists		
	c	Cleanliness of tourist places		
	d	Safety and security		
2.3	Do you visit domestic tourism events/fairs and festivals?		Yes-1	No-2
2.4	If Yes, which fairs and festivals you like more? (multiple answer)			
	Trade fair-1	Dance festival-2	Handicraft fair-3	Traditional festival-4
	Religious festival-5	Convention of tourism association-6	Other (specify.....)-7	
2.5	Have you seen advertisements and advertorials of Ministry of Tourism in newspapers and magazines for promotion of tourism? Yes-1 No-2			
2.6	If Yes, in your opinion how it helps the tourism sector in the country? Helps to enrich the knowledge of tourism resources of the country-1 Provides information about different initiatives of Ministry of Tourism-2 Creates awareness regarding different tourism projects among the people-3 Motivates people to visit the tourist places-4 Any other (specify.....)-5			
2.7	In your opinion, what is the effectiveness of printed publicity material and collaterals published by MOT towards promotion of tourism in the country? Very effective-1 Less effective-2 Not effective-3 Cannot say-4			

2.8	Which promotion and publicity activities of MOT are you aware of?							
2.9	If you are aware, what is the effectiveness of promotion and publicity activities of MOT? Very effective-1 Somewhat effective-2 Not effective-3 Cannot say-4							
2.10	In your opinion, what other promotion and publicity activities can be added for promotion of tourism in India?							
2.11	To your knowledge, which events/fairs and festivals does MOT participate in?							
2.12	Which events/fairs and festivals should Ministry of Tourism participate in?							
2.13	For which events/fairs and festivals should Ministry of Tourism provide assistance?							
2.14	Which Niche tourism related programmes of Ministry of Tourism are you aware of?							
2.15	To which Niche tourism related programmes should Ministry of Tourism provide assistance?							
2.16	How do you rate the effectiveness of domestic MDA scheme on the following components? Very effective-1 Less effective-2 Not effective-3 Cannot say-4							
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2. Procedural difficulties								
3. Adequacy of grants								
2.17	Are you aware of the role of India Tourism domestic offices? Fully aware-1 Little aware-2 Not aware-3							
2.18	How useful are the activities of India Tourism domestic offices? Very useful-1 Somewhat useful-2 Not useful-3 Cannot say-4							
2.19	Which activities of India Tourism domestic offices do you utilize in your business?							

Name of the Interviewer:

Date of interview:

**GOVERNMENT OF INDIA
MINISTRY OF TOURISM
STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND
PUBLICITY (DPP)
TOUR OPERATOR / TRAVEL AGENT / TOUR TRANSPORT OPERATOR QUESTIONNAIRE**

Sl. No.

1	Particulars			
1.1	Location:		1.2	State:
1.3	Category:	Tour operator-1	Travel agent-2	Tour transport operator-3
1.4	Name of the operator/agent:			
1.5	Address:			
1.6	Phone No.:			
1.7	Annual income:	Above 5 lakh to 10 lakh-1	Above 10 lakh-2	

2	Impact of promotion campaign			
2.1	Do you feel that there is an improvement in the following area due to different campaign by Ministry of Tourism? Significantly increased-1 Little increased-2 Not increased-3 Cannot say-4			
		1. Importance of tourism		
		2. Increase in tourist arrival		
		3. Knowledge of tourist place		
		4. Awareness on hospitality		
		5. Income generation		
		6. Cleanliness of tourist places		
2.2	Do you feel that there is an improvement in the following due to Atithi Devo Bhavah campaign? Significantly increased-1 Little increased-2 Not increased-3 Cannot say-4			
	a	Inculcation of good habits in local residents		
	b	Sensitizing local population for showing good behaviour towards tourists		
	c	Cleanliness of tourist places		
	d	Safety and security		
2.3	Do you visit domestic tourism events/fairs and festivals?		Yes-1	No-2
2.4	If Yes, which fairs and festivals you like more? (multiple answer)			
	Trade fair-1	Dance festival-2	Handicraft fair-3	Traditional festival-4
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2.6	If Yes, in your opinion how it helps the tourism sector in the country? Helps to enrich the knowledge of tourism resources of the country-1 Provides information about different initiatives of Ministry of Tourism-2 Creates awareness regarding different tourism projects among the people-3 Motivates people to visit the tourist places-4 Any other (specify.....)-5			
2.7	In your opinion, what is the effectiveness of printed publicity material and collaterals published by MOT towards promotion of tourism in the country? Very effective-1 Less effective-2 Not effective-3 Cannot say-4			
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Name of the Interviewer:

Date of interview:

**GOVERNMENT OF INDIA
MINISTRY OF TOURISM
STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND
PUBLICITY (DPP)
INDUSTRY ASSOCIATION QUESTIONNAIRE**

Sl. No.

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1.1	Location:		1.2	State:
1.3	Name of the Industry Association:			
1.4	Name and designation of the respondent:			
1.5	Phone No.:			

2	Impact of promotion campaign			
2.1	Please furnish detailed information of events for which you have received assistance from MOT under DPP scheme. (Furnish necessary photographs, agenda, proceedings, brochures, pamphlets, press clippings, and other related materials)			
	Financial year	Name of the event	Financial support received from Ministry of Tourism (Rs. in lakhs)	What activities did you perform in your event to promote MOT programme (Record verbatim)
	2012-13			
	2013-14			
	2014-15			

2.2	What has been the impact of different tourism events/fairs and festivals in the country? (Please provide impact of only those events/fairs & festivals for which support of Ministry of Tourism was received)			
	<i>Sl. No.</i>	<i>Type of benefit</i>	<i>2012-13</i>	<i>2013-14</i>
	1	Increase in number of tourists (%)		
	2	Increase in off-season tourists (%)		
	3	Increase in tourist expenditure (%)		
	4	Increase in the time spend by the tourists on the activity (%)		
	5	Any other (specify.....) (%)		
2.3	Advertisement by MOT given through which media will be useful for promotion of tourism in the country? (Rank 1 for most preferred, 2 for next preference and so on.....)			
	<i>Sl. No.</i>	<i>Media</i>	<i>Within India (Domestic)</i>	
	1	TV		
	2	Radio		
	3	Magazine		
	4	Newspaper		
	5	MOT website		
	6	Online portals		
	7	Social media like Facebook, Twitter, Instagram, etc.		
2.4	Which Niche tourism products that MOT should focus on? (Rank 1 for most preferred, 2 for next preference and so on.....)			
		1. Adventure		
		2. Film		
		3. Golf		
		4. Polo		
		5. Medical		
		6. Wellness		
		7. Rural		
2.5	Which events / fairs and festivals should MOT participate for promotion of tourism?			
	a. Domestic			
	b. International			
2.6	Which events / fairs and festivals should MOT give assistance to your association for promotion of tourism?			
	a. Domestic			
	b. International			

2.7	<p>How do you rate the effectiveness of MDA scheme for domestic tourism on the following components?</p> <p align="center">Very effective-1 Less effective-2 Not effective-3 Cannot say-4</p> <table border="1" style="width:100%; border-collapse: collapse; margin-left: 20px;"> <tr> <td style="width:5%; text-align:center;">1. Timeliness of grants</td> <td style="width:15%;"></td> <td style="width:15%;"></td> <td style="width:15%;"></td> <td style="width:15%;"></td> </tr> <tr> <td style="text-align:center;">2. Procedural difficulties</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td style="text-align:center;">3. Adequacy of grants</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>	1. Timeliness of grants					2. Procedural difficulties					3. Adequacy of grants													
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2.9	<p>Which of the roles of India Tourism domestic offices do you think are useful?</p>																								
2.10	<p>Which other roles should also be performed by India Tourism domestic offices?</p>																								
2.11	<p>What has been the impact in the following area due to different promotion activities by Ministry of Tourism? (Rank 1 for highest impact, 2 for next highest, and so on.....)</p> <table border="1" style="width:100%; border-collapse: collapse; margin-left: 20px;"> <thead> <tr> <th style="width:10%; text-align:center;"><i>Sl. No.</i></th> <th style="width:60%; text-align:center;"><i>Impact</i></th> <th style="width:30%; text-align:center;"><i>Rank</i></th> </tr> </thead> <tbody> <tr> <td align="center">1</td> <td>Importance of tourism</td> <td></td> </tr> <tr> <td align="center">2</td> <td>Increase in tourist arrival</td> <td></td> </tr> <tr> <td align="center">3</td> <td>Knowledge of tourist place</td> <td></td> </tr> <tr> <td align="center">4</td> <td>Awareness on hospitality</td> <td></td> </tr> <tr> <td align="center">5</td> <td>Income generation</td> <td></td> </tr> <tr> <td align="center">6</td> <td>Cleanliness of tourist places</td> <td></td> </tr> <tr> <td align="center">7</td> <td>Others (specify.....)</td> <td></td> </tr> </tbody> </table>	<i>Sl. No.</i>	<i>Impact</i>	<i>Rank</i>	1	Importance of tourism		2	Increase in tourist arrival		3	Knowledge of tourist place		4	Awareness on hospitality		5	Income generation		6	Cleanliness of tourist places		7	Others (specify.....)	
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Name of the Interviewer:

Date of interview:

**GOVERNMENT OF INDIA
MINISTRY OF TOURISM
STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND
PUBLICITY (DPP)
NICHE INDUSTRY QUESTIONNAIRE**

Sl. No.

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1	Particulars			
1.1	Location:		1.2	State:
1.3	Name of the Organization:			
1.4	Name and designation of the respondent:			
1.5	Phone No.:			

2	Impact of promotion campaign			
2.1	In your opinion, what activities of NICHE tourism does MOT support?			
2.2	Type of activity in which you are involved. MICE-1 Polo-2 Golf-3 Wellness-4 Any other (Specify.....)-5			
2.3	What are the benefits you have achieved due to assistance provided by MOT for promoting NICHE tourism in last three years?			
	<i>Sl. No.</i>	<i>Type of benefit</i>	<i>2012-13</i>	<i>2013-14</i>
	1	Increase in number of niche tourists (%)		
	2	Increase in off-season tourists (%)		
	3	Increase in tourist expenditure (%)		
	4	Increase in the time spend by the tourists on the activity (%)		
	5	Any other (specify.....) (%)		
2.4	Advertisement by MOT given through which media will be useful for your business of Niche tourism? (Rank 1 for most preferred, 2 for next preference and so on.....)			
	<i>Sl. No.</i>	<i>Media</i>	<i>Within India (Domestic)</i>	
	1	TV		
	2	Radio		
	3	Magazine		
	4	Newspaper		
	5	MOT website		
	6	Online portals		
	7	Social media like Facebook, Twitter, Instagram, etc.		
2.5	Is there a need to advertise NICHE tourism internationally? Give your reasons.			
2.6	Which promotion of NICHE tourism by MOT do you remember?			

2.7	Which Niche tourism products that MOT should focus on? (Rank 1 for most preferred, 2 for next preference and so on.....) <table border="1" style="margin-left: 20px; width: 60%; border-collapse: collapse;"> <tr><td>1. Adventure</td><td style="width: 20px;"></td></tr> <tr><td>2. Film</td><td></td></tr> <tr><td>3. Golf</td><td></td></tr> <tr><td>4. Polo</td><td></td></tr> <tr><td>5. Medical</td><td></td></tr> <tr><td>6. Wellness</td><td></td></tr> <tr><td>7. Rural</td><td></td></tr> </table>	1. Adventure		2. Film		3. Golf		4. Polo		5. Medical		6. Wellness		7. Rural	
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5. Medical															
6. Wellness															
7. Rural															
2.8	Which events / fairs MOT has participated in?														
2.9	Did you also participate in the same events / fairs?														
2.10	How do you rate the experience of participating in those events / fairs? Excellent-1 Very good-2 Good-3 Average-4 Poor-5														
2.11	Which events / fairs and festivals should MOT participate for promotion of Niche tourism? <table border="1" style="width: 90%; margin-left: 20px; border-collapse: collapse;"> <tr> <td style="width: 20%; padding: 5px;">c. Domestic</td> <td style="height: 30px;"></td> </tr> <tr> <td style="padding: 5px;">d. International</td> <td style="height: 30px;"></td> </tr> </table>	c. Domestic		d. International											
c. Domestic															
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2.12	Which events / fairs and festivals should MOT give assistance to your organization for promotion of Niche tourism? <table border="1" style="width: 90%; margin-left: 20px; border-collapse: collapse;"> <tr> <td style="width: 20%; padding: 5px;">c. Domestic</td> <td style="height: 30px;"></td> </tr> <tr> <td style="padding: 5px;">d. International</td> <td style="height: 30px;"></td> </tr> </table>	c. Domestic		d. International											
c. Domestic															
d. International															
2.13	How do you rate the effectiveness of MDA scheme for domestic tourism on the following components? Very effective-1 Less effective-2 Not effective-3 Cannot say-4 <table border="1" style="margin-left: 20px; width: 60%; border-collapse: collapse;"> <tr><td>1. Timeliness of grants</td><td style="width: 20px;"></td></tr> <tr><td>2. Procedural difficulties</td><td></td></tr> <tr><td>3. Adequacy of grants</td><td></td></tr> </table>	1. Timeliness of grants		2. Procedural difficulties		3. Adequacy of grants									
1. Timeliness of grants															
2. Procedural difficulties															
3. Adequacy of grants															
2.14	How satisfied are you with the scheme guidelines for promoting niche tourism products? Very much-1 Little bit-2 Not at all-2														

Name of the Interviewer:

Date of interview:

**GOVERNMENT OF INDIA
MINISTRY OF TOURISM
STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND
PUBLICITY (DPP)
STATE/UT OFFICIAL QUESTIONNAIRE**

Sl. No.

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1	Particulars			
1.1	Location:		1.2	State:
1.3	Division / Section:			
1.4	Name and designation of the official:			
1.5	Phone No.:			
1.6	Prime job responsibility at present Provide information-1 Implement promotional plan-3 Market the tourism resources-5		Make plan for tourism promotion-2 Office administration-4 Others (specify.....)-6	

2	Implementation of DPP			
2.1	Status of domestic tourist arrival in the State/UT.			
		Financial year	Number of domestic tourist arrival (in lakhs)	
		2012-13		
		2013-14		
		2014-15		
2.2	What are the components under DPP scheme that you know about?			
2.3	Name of the components under DPP for which your office has utilized funds in years 2012-13, 2013-14 and 2014-15? (excluding events/fairs and festivals)			
	Financial year	Name of the components	Amount received from MOT (Rs. in lakhs)	Amount utilized (Rs. in lakhs)
	2012-13			
	2013-14			
	2014-15			
2.4	Why have you utilized the funds under above components of DPP scheme? (Give reasons year wise and scheme wise)			

2.5	Why have you not utilized other components of DPP scheme? (Give reasons year wise and component wise)				
2.6	Number of tourism events/fairs and festivals organised				
	Financial year	Number of tourism events/fairs and festivals organized in the State/UT	Total amount spent (Rs. in lakhs)	Grant received from MOT (Rs. in lakhs)	Amount utilised (Rs. in lakhs)
	2012-13				
	2013-14				
	2014-15				

3	Impact of DPP			
3.1	To what extent has there been an improvement in the following area due to different tourism events/fairs and festivals in the State? Significantly increased-1 Little increased-2 Not increased-3 Cannot say-4			
	1. Increase in tourist arrival			
	2. Enrich the knowledge of tourist attractions of the country			
	3. Preserve the cultural heritage of the country			
	4. Income generation in the country			
	5. Showcase the tourism products of the country			
3.2	To what extent the events/fairs and festivals organized been useful in promoting tourism in the State? Very useful-1 Little useful-2 Not useful-3			
3.3	How do you rate the impact of the participation of India Tourism in major travel fairs (SATTE/KTM/TTF/GITB/ITM/any other) towards promotion of tourism? Very much-1 Little bit-2 Not at all-3			
3.4	How do you rate the impact of publicity material and collaterals in hard copy in promotion of tourism in the State? Significantly increased-1 Little increased-2 Not increased-3 Cannot say-4			
	1. Increase in tourist arrival			
	2. Provide information to the tourists on the tourists resources			
	3. Income generation			
	4. Provide information regarding different initiatives of tourism department			
3.5	How effective do you find the financial assistance to the State/UT provided for following components for promotion of tourism? Very Effective-1 Somewhat effective -2 Not effective-3 Cannot say-4			
3.6	What are the steps taken by the State tourism department in promoting niche tourism products through events and other schemes of MOT?			

3.7	What is the effectiveness of promoting the niche tourism products through events and other schemes of MOT in the State? Very effective-1 Less effective-2 Not effective-3 Cannot say-4								
	<table border="1"> <tr> <td data-bbox="467 258 1102 296">1. Adventure</td> <td data-bbox="1102 258 1229 296"></td> </tr> <tr> <td data-bbox="467 296 1102 333">2. Golf</td> <td data-bbox="1102 296 1229 333"></td> </tr> <tr> <td data-bbox="467 333 1102 371">3. Polo</td> <td data-bbox="1102 333 1229 371"></td> </tr> <tr> <td data-bbox="467 371 1102 409">4. Wellness</td> <td data-bbox="1102 371 1229 409"></td> </tr> </table>	1. Adventure		2. Golf		3. Polo		4. Wellness	
1. Adventure									
2. Golf									
3. Polo									
4. Wellness									
3.8	How do you rate the effectiveness of DPP scheme on the following components? Very good-1 Good-2 Average-3 Poor-4 Very poor-5								
	<table border="1"> <tr> <td data-bbox="467 497 1102 535">1. Timeliness of grants</td> <td data-bbox="1102 497 1229 535"></td> </tr> <tr> <td data-bbox="467 535 1102 573">2. Procedural difficulties</td> <td data-bbox="1102 535 1229 573"></td> </tr> <tr> <td data-bbox="467 573 1102 611">3. Adequacy of grants</td> <td data-bbox="1102 573 1229 611"></td> </tr> </table>	1. Timeliness of grants		2. Procedural difficulties		3. Adequacy of grants			
1. Timeliness of grants									
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3. Adequacy of grants									
3.9	How satisfied are you with the schemes under DPP for promotion of domestic tourism? Very much-1 Little bit-2 Not at all-2								
3.10	Would you like to continue to receive allocation under these schemes along the existing guidelines? Yes-1 No-2								
3.11	In your opinion, what changes or modifications are required in the guidelines/schemes/activities undertaken under DPP for promotion of domestic tourism?								

Name of the Interviewer:

Date of interview:

**GOVERNMENT OF INDIA
MINISTRY OF TOURISM
STUDY ON EVALUATION FOR THE SCHEME OF DOMESTIC PROMOTION AND
PUBLICITY (DPP)
INDIA TOURISM DOMESTIC OFFICIAL QUESTIONNAIRE**

Sl. No.

1	Particulars
1.1	Location: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 1.2 State: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
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1.4	Name and designation of the official: <input type="text"/>
1.5	Phone No.: <input type="text"/>
1.6	Prime job responsibility at present Provide information-1 Implement promotional plan-3 Market the tourism resources-5 Make plan for tourism promotion-2 Office administration-4 Others (specify.....)-6

2	Impact of DPP																
2.1	What are the activities undertaken by this India Tourism domestic office from the funds allocated under Tourism Promotion Grant and Window Display? <table border="1"> <thead> <tr> <th>Financial year</th> <th>Activities undertaken</th> <th>Amount received from MOT (Rs. in lakhs)</th> <th>Amount utilized (Rs. in lakhs)</th> </tr> </thead> <tbody> <tr> <td>2012-13</td> <td></td> <td></td> <td></td> </tr> <tr> <td>2013-14</td> <td></td> <td></td> <td></td> </tr> <tr> <td>2014-15</td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Financial year	Activities undertaken	Amount received from MOT (Rs. in lakhs)	Amount utilized (Rs. in lakhs)	2012-13				2013-14				2014-15			
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2012-13																	
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2.2	What are the facilitation services do you provide to the tourists?																
2.3	What are your suggestions to make India Tourism domestic offices more effective and play a larger role for promotion of domestic tourism?																
2.4	How do you rate the usefulness of Tourism Promotion grant for meeting the promotional and marketing objectives of this office? Very good-1 Good-2 Average-3 Poor-4 Very poor-5																
2.5	How do you rate the usefulness of Window Display for meeting the promotional and marketing objectives of this office? Very good-1 Good-2 Average-3 Poor-4 Very poor-5																
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Name of the Interviewer: Date of interview: