

# India: Regional Tourism Satellite Accounts, 2015-16 Kerala

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# India: Regional Tourism Satellite Accounts, 2015-16

Kerala

*Study sponsored by*

**The Ministry of Tourism, Government of India**

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**NATIONAL COUNCIL OF APPLIED ECONOMIC RESEARCH**

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The findings, interpretations, and conclusions expressed are those of the authors and do not necessarily reflect the views of the Governing Body or Management of NCAER.

## FOREWORD

NCAER has been working closely with India's Union Ministry of Tourism for nearly two decades on India's Tourism Satellite Accounts. Having released the Third National TSA Report for 2015-16 in November 2018, NCAER has now prepared reports on Regional TSAs (RTSAs) and State TSAs for 2015-16. This is the second round of state TSAs, following the first round in 2009-10. Notwithstanding the many data limitations at the state level, India is one of the few countries across the world to have prepared TSAs at the sub-national level.

The reports delineate the direct as well as indirect contribution of tourism to the state economy in addition to the detailed tourism profile of the states. The RTSAs have been prepared in accordance with the United Nations World Tourism Organisation (UNWTO) framework, popularly known as the Recommended Methodological Framework or RMF:TSA 2008. The tourism statistics available are largely physical and non-monetary in nature, but their value needs to be quantified for estimation of the share of tourism in economic aggregates like GDP and employment. A good TSA estimates these values by using the macro-economic framework of the System of National Accounts (SNA) by integrating tourism statistics into them and measuring the linkages between the demand and supply for goods and services related to tourism.

The challenges of the unequal geographical distribution of tourism activity within a nation, the varied tourism destinations offered by different states, and different development priorities of state administrations have necessitated understanding tourism as a location-specific economic activity. The UNWTO encourages countries to develop sub-national or regional TSAs to account for the decentralisation of political power, for the multi-faceted nature of tourism activities across locations, for the growing interest of tourism-related local businesses in learning about the inter-relation of their activity with others, and for the management of state-specific resources. These NCAER RTSAs have sought to address these issues by upgrading the data we have used for measuring economic impact at the sub-regional level.

I would like to take this opportunity to thank the agencies that provided the underlying data for the RTSA 2015-16, especially the National Sample Survey Office for their Domestic Tourism Survey, the Indian Statistical Institute for their International Passenger Survey, and the Central Statistics Office for National Accounts Statistics. NCAER is particularly grateful to nodal officers at the Ministry of Tourism, including Shri S.M. Mahajan, former Additional Director-General; Shri P.C. Cyriac, Additional Director-General; Ms Mini Prasannakumar, former Director; Shri Shailesh Kumar, Deputy Director; Ms Anshika Bhatnagar, Assistant Director; and Shri S.K. Mohanta, DPA, for the valuable inputs and administrative support for preparing the TSA. This work would not have been possible without their wholehearted cooperation.

For their excellent work and commitment to this research, I would like to thank members of the NCAER TSA research team led by Dr Poonam Munjal, Senior Fellow, and

including Senior Fellow Mr K.A. Siddiqui, Fellow Mr P.K. Ghosh, Associate Fellow Dr Nijara Deka, Senior Research Analysts Dr Palash Baruah and Mr Asrar Alam, and Research Associates Ms Sundus Usmani, Ms Sanjana Chhabra, Ms Gunjan Pal, and Mr Rahat Hasan Khan. They all deserve the highest praise for the care with which the State TSAs have been put together.

New Delhi  
December 18, 2019

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# ABBREVIATIONS AND ACRONYMS

## Units used in the Report

1 crore = 10 million

1 lakh = 100 thousand

<b>CES</b>	Consumer Expenditure Survey
<b>CSO</b>	Central Statistical Office
<b>DTS</b>	Domestic Tourism Survey
<b>EUS</b>	Employment and Unemployment Survey
<b>FISIM</b>	Financial Intermediation Services Indirectly Measured
<b>GCE/GFCE</b>	Government Final Consumption Expenditure
<b>GDP</b>	Gross Domestic Product
<b>GSDP</b>	Gross State Domestic Product
<b>GVA</b>	Gross Value Added
<b>GVATI</b>	Gross Value Added of Tourism Industries
<b>IPS</b>	International Passenger Survey
<b>IRTS</b>	International Recommendations on Tourism Statistics
<b>ISI</b>	Indian Statistical Institute
<b>ISIC</b>	International Standard Industrial Classification (United Nations)
<b>MPCE</b>	Monthly per capita consumer expenditure
<b>MRP</b>	Mixed reference period
<b>NAS</b>	National Accounts Statistics
<b>NCAER</b>	National Council of Applied Economic Research
<b>NIT</b>	Net Indirect tax
<b>NPISH</b>	Non-Profit Institutions Serving Households
<b>NRI</b>	Non-Resident Indian
<b>NSSO</b>	National Sample Survey Office
<b>PFCE</b>	Private Final Consumption Expenditure
<b>PIO</b>	People of Indian Origin
<b>PP</b>	Purchasers price
<b>RMF</b>	Recommended Methodological Framework
<b>SUT</b>	Supply and Use Tables
<b>TDGDP</b>	Tourism Direct Gross Domestic Product
<b>TDGVA</b>	Tourism Direct Gross Value Added
<b>TSA:RMF</b>	Tourism Satellite Account: Recommended Methodological Framework
<b>TTM</b>	Trade and transport margins
<b>UN</b>	United Nations
<b>UNWTO</b>	United Nations World Tourism Organisation
<b>VAT</b>	Value Added Tax
<b>WTO</b>	World Tourism Organisation

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# I. INTRODUCTION

**Tourism Satellite Account is a framework designed to measure goods and services associated with tourism, according to internationally agreed standards, concepts, classifications and definitions**

Tourism is a social, cultural and economic phenomenon related to the movement of people to places outside their usual place of residence. While recreation is the usual motive of tourism activity but it is not restricted to recreation only and expands to other motives like business, health, religious, educational and in recent times, even shopping. Owing to the rapidly increasing tourism activities across the globe and the significantly high foreign exchange earnings from such tourism activities, it has become a task of primary preference for nations to measure tourism statistics (both monetary and non-monetary).

The importance of measuring tourism statistics also emerges from the fact that tourism induces economic activity either directly or indirectly, sometimes in places beyond those visited. These could be in terms of economic output or in terms of employment generation, besides other social and infrastructural dimensions. The availability of reliable statistics on tourism sector and analysis based on them can be of utmost importance to the policymakers for decision making.

The United Nations World Tourism Organization (UNWTO) recommends to put the relevant tourism statistics in an accounting framework so as to integrate these statistics with the System of National Accounts and to show the linkages between demand and supply for goods and services in respect of Tourism. This accounting framework is called the **Tourism Satellite Account (TSA)**. By definition, it is a framework designed to measure goods and services associated with tourism, according to internationally agreed standards, concepts, classifications and definitions. It helps in assessing the size and contribution of tourism to the

economy.

While such framework is available for the preparation of national level TSA, there is a void in the availability of such framework for preparing the regional or sub-national level TSAs. Nonetheless, regional estimation of tourism statistics and bringing them together in a TSA framework has been arousing lot of interest globally and is increasingly becoming popular. This has also been recognized by UNWTO, as a result of which it has taken various initiatives to develop the regional or sub-national TSA.

In a paper published by UNWTO Statistics and Tourism Satellite Account (STSA) in October 2013, titled “Regional Tourism Satellite Account”, as one of the STSA Issue Paper Series, two distinct conceptual and methodological approaches to prepare regional TSA, have been discussed (Figure I.1. These are the following:

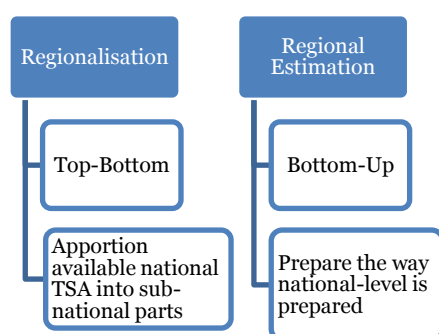
### Regionalization

Also called the interregional approach or top-bottom approach, regionalization attempts to apportion the available national TSA into its sub-national parts or regions using different indicators and relevant ratios. Therefore, this approach is common to all the regions of the national territory and is based on and intimately linked to the System of National Accounts. However, this approach relies on the existence of a National TSA and the availability in each region of uniform tourism information for each of the tables and aggregates to be regionalized.

This approach has been used by many countries like Canada (Barber-Dueck et al., 2003); Australia (Van Ho et al. 2008), and the northern European countries of Denmark, Finland and Norway (Zhang 2005, Kontinen 2006, Braendvang et al. 2001).

These countries have developed RTSAs using the national TSA or national accounts and the input-output system, consisting essentially of supply and use tables (SUT).

**Figure I.1: Two approaches to prepare RTSA**



**First sub-national TSAs for Indian states and UTs were prepared for the year 2009-10, along with India's Second national-level TSA**

**Regional Estimation**

This approach, also called bottom-top approach, entails the development of a specific TSA for any given region, in which specific situations and differentials may also be identified for important sub-regional territories, provided there is sufficient information on them. Hence, this approach helps in preparing the regional TSA (RTSA), just as one would prepare the national-level TSA.

This approach has been used by the various regions of Spain, most recent been the one presented in 2010 for the Madrid region (Instituto de Estadística-C. Madrid (2011)). This approach has also been used by others like Wales in the United Kingdom (Jones et al. 2010) and Flanders-Brussels (Weekers, 2012). Such TSA's are developed using the SUT and other statistical and accounting information for the specific region concerned, reproducing the basic TSA:RMF scheme on a regional scale, with the necessary adjustments required for conceptual and statistical reasons.

However, due to the lack of a common conceptual approach across the countries, there continues to be a difficulty in making RTSA framework comparable with each other or with the national framework. Nonetheless, according to TSA:RMF 2008, there are various reasons for encouraging discussions on the preparation of RTSAs. Some of these reasons are:

- There is a worldwide trend towards a certain degree of decentralization of political power and decentralized management of national resources in federal states, regions, municipalities, etc. In order to allocate and monitor these resources effectively, more and better integrated regional and local information are required.
- The tourism activities are multifaceted in nature and can potentially benefit rural areas that are seeking to diversify.
- The unequal geographical distribution and characteristics of tourism activity within the national territory, from the standpoint of both demand and supply, lead to additional

requirements for tourism statistics at the various territorial levels.

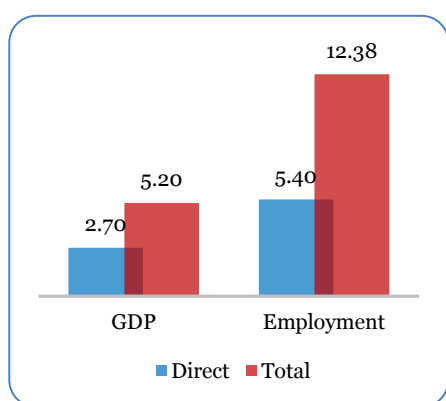
- There is a growing interest of tourism-related businesses in learning about the interrelation of their activity with others and its main determinants and seasonal cycles.
- There is a great necessity of improving the allocation of resources in national and local economies, which can only be achieved by upgrading quantitative references and measuring economic impacts.

### **RTSAs for states in India**

In India, preparation of a national level TSA itself is a voluminous and expensive task as it requires primary surveys to be undertaken to capture the relevant information from Domestic Tourists, Inbound Tourists as well as Outbound Tourists. These are collected through two different surveys – household survey called “Domestic Tourism in India” and international tourists’ survey called “International Passenger Survey”, details of which will be presented in later sections.

So far, three national level TSAs have been prepared for India. The first TSA was for the reference year 2002-03, second for 2009-10 and the third TSA for 2015-16. With regard to the RTSAs, the data for 2009-10 were used to make the first attempt to prepare the TSAs for all the states of India for the same year. The preparation of TSAs for all states was accomplished in different phases. In its pilot phase and as part of the Second TSA-2009-10, TSAs for two states – Madhya Pradesh and Kerala – were prepared. Following this, TSAs of the remaining 33 states and UTs were prepared, using the same data, in three phases under the “3-year integrated study for the preparation of TSAs for all states and UTs of India”. All of these studies, including all the three national level TSAs and all state TSAs were commissioned to National Council of Applied Economic Research (NCAER) by the Ministry of Tourism (MoT).

**Figure I.2: Contribution of Tourism to national economy (%)**



Source: Third Tourism Satellite Account for India – 2015-16

Now, continuing with the practice of preparing the TSAs at national and state level in regular intervals, MoT has entrusted NCAER again to prepare the country's Third TSA along with the TSAs for all the states and UTs. As part of this study, the present report presents the TSA for the state of Kerala and the key outcome is the Tourism sector's contribution in the total GDP and employment of the state.

### Contribution of Tourism to national economy

At All-India level, the Third TSA reveals that tourism accounts for 2.70 percent to the GDP as its direct share. With indirect share added, the total contribution works out to be 5.20 percent. With respect to employment, the direct share is 5.40 percent which the total share, including indirect component, is 12.38 percent (Figure I.2).

### Structure of the Report

The present chapter on Introduction dealt with the overview of Tourism Satellite Account and its methodology widely adopted for regional accounts across the countries. Also the chapter gave the background of the regional TSAs in India.

Chapter II presents a snapshot of the state with respect to its geographies, demographic, economic and social profile. Other indicators which are of interest with tourism perspective like infrastructure, cultural aspects and main tourism destinations are also discussed.

Chapter III talks briefly about the various data sources that were used in the preparation of the state TSA.

Chapter IV provides the framework of the recommended TSA tables and tourism aggregates that have been included in this Report. The text for this section is mainly drawn from IRTS, 2008 and TSA: RMF 2008.

Chapter V presents the TSA tables for the year 2015-



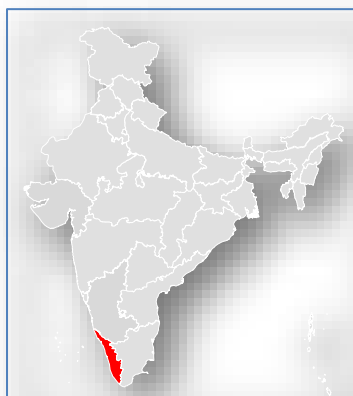
16. This Section also includes the tourism aggregates that have been derived from the TSA tables.

Chapter VI presents the key findings of TSA, 2009-10.

Annexure I presents the key challenges faced in the preparation of state-level TSA. Annexure II talks briefly about the international study visit undertaken by the team to Australia to exchange the ideas related to methodology involved in preparing regional TSAs.

The Glossary includes the conceptual issues and operational definitions of tourism, its types, forms, dimensions and related issues.

## II. STATE PROFILE



- ❖ **Capital:** Thiruvananthapuram
- ❖ **No. of Districts:** 14
- ❖ **Location:** Southern India
- ❖ **Land Area:** 38,852 sq. Km
- ❖ **Climate:** Tropical Coastal Climate
- ❖ **Terrain:** Coastal Plains and Mountain
- ❖ **Major Rivers:** Krishna, Kaveri

Kerala is a Southern coastal state of India with its coast lying in Arabian Sea and it shares its state borders with Tamil Nadu and Karnataka.

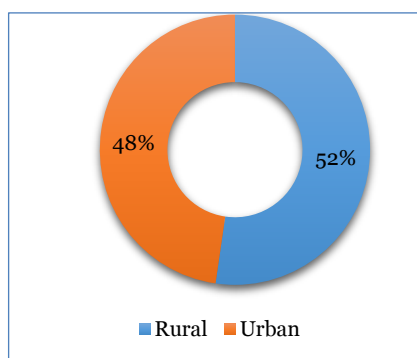
### II.1. Demographics and Social Profile

Kerala have a population of 3.35 Crore (As per Census 2011) and 1.59 Crore people reside in urban areas and remaining 1.74 Crore in rural areas. Thus, 52 percent of the total population resides in rural areas while 48 percent resides in urban areas (Figure II.1).

The population density of the state is 860 per Sq. Km which is higher than the national average of 368 per Sq. Km. The literacy rate is 93.91 percent in the state. The overall sex ratio is 1084 females per 1000 males. The total work participation in the state is 34.78 percent which is lower than the national average of 39.8 percent. The workforce participation rate by gender is presented in Figure II.2.

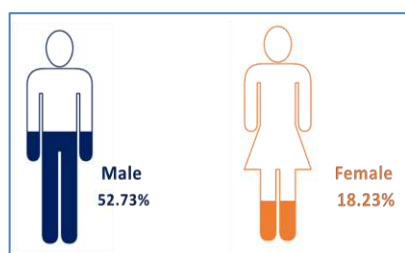
The state is also called “God’s own country” because many of the God figures according to Hindu mythology lived here. The Human Development Index of Kerala is the highest in the country and the Human Development Index is even comparable to that of many developed countries of the world. The poverty levels in the state are one of the lowest in the country. The various paintings of Kerala have its

**Figure II.1: Population Breakup**



Source: Census of India

**Figure II.2: Work Force participation rates**



Source: Census of India

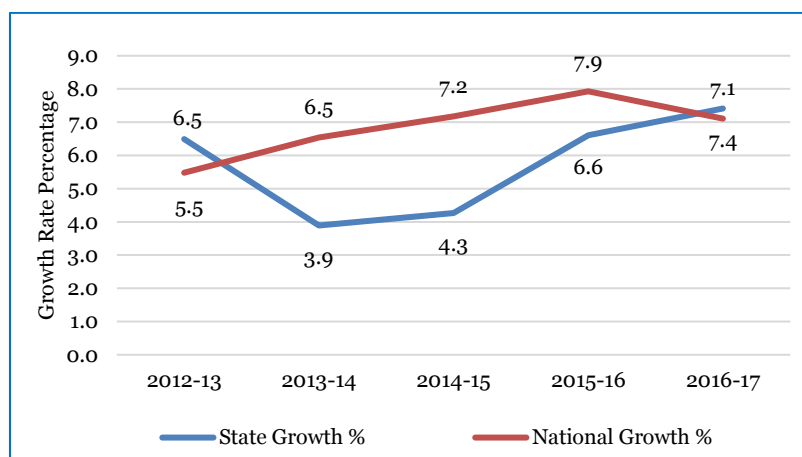
origin from the cave and wall paintings. The major language spoken in the state is Malayalam.

## **II.2. Economic Profile**

The macro indicators of the state in terms of constant (2011-12) price for the year 2016-17 are showing a positive trends. The GSDP was Rs. 480878 Crore; the economic growth rate was 7.4 percent (Figure II.3). The net state domestic product was Rs. 440515 Crore. The per capita income was Rs. 128347 Crore.

The state has a robust agriculture economy with the presence of many spice gardens, tea and coffee farms. The state being a coastal state has an export market. Many in Kerala work in foreign countries and send remittances back home and this is a very important part of the economy. Most of the population of the state depends on the Agriculture sector for their income. The fisheries sector in the state also supports a lot of families and is a major part of the economy. The state also has one of the largest reserves of Thorium which can be a huge asset to the country.

The state is one of the major producers of rice, rubber, dry fruits, spices, coconut etc. Kerala is one of the major producers of fish in India. The state in recent years has gained a lot of traction in terms of tertiary sector. The state has also gained popularity in tourism in national and international level.

**Figure II. 3: Growth in Gross State Domestic Product (constant prices)**

Source: Central Statistics Office

#### Box II.1: Infrastructural indicators



Total road: 200808 Km, Surfaced Road: 142220 Km



3 International Airports and 8 Domestic Airports.



Optic fiber cable Laid under Bharat net Phase-1 is 31825 Km.

### II.3. Infrastructure and Connectivity

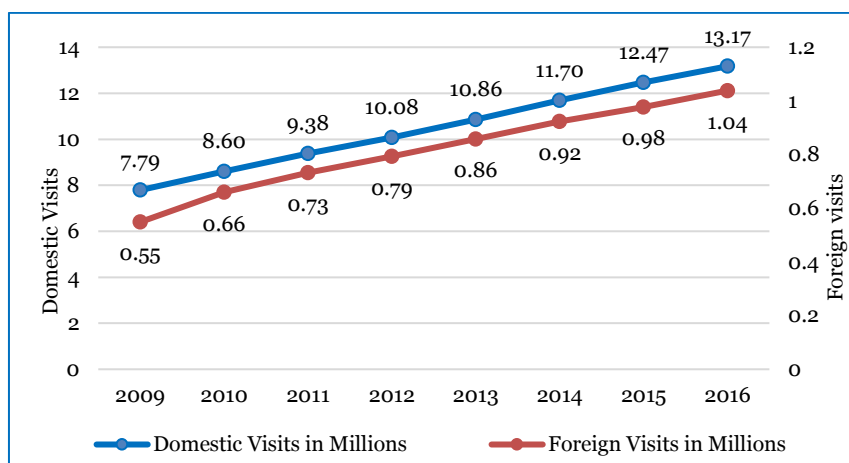
The state has a huge network of State and National highways and rural roads. The state is blessed with various canals, estuaries, water bodies, rivers, backwaters

and streams and thus is conducive for inland water ways.

The state has major ports and soon there will be Metro Rail connectivity in the city of Kochi. The state of Kerala has a huge coastline and has many ports along its coastline and also serves as a major center for trade and connectivity. The state is relatively better placed in terms of cleanliness.

Some of the key infrastructural indicators are presented in Box II.1.

The trend of domestic as well as foreign tourist visits in the state is presented in Figure II.4.

**Figure II.4: Foreign and Domestic Tourist Visits**

Source: India Tourism Statistics, Ministry of Tourism

### Box II.2: Major Types of Tourism



## II.4. Tourist Attractions

Kerala due to its diverse culture and historical influence of many other civilizations has a very diverse culture and has also maintained its traditions and values. The state has many old Hindu temples, Churches, Mosques and old heritage buildings. These places include Bekal Fort, Dutch cemetery, Vizhinjam rock cut caves and many more.

Kerala being a coastal state has many beaches which is a huge tourist attraction. These beaches include Kovalam, Chowara, Varkala and many others. The state of Kerala is the only state to have an extensive network of backwater canals, canal, Lagoons, lakes and rivers and the house boats that cruise on these waters are very unique and are very popular among the tourists and because of this Alappuzha is also known as the “Venice of the East”.

The state is a land of many festivals and most of these festivals are unique to Kerala. These festivals include Onam which is a huge festival celebrated all over Kerala, and other festivals include Attukal Pongala

which is a women only festival, Pooram are the temple festivals celebrated in the temples, the great boat race festival is a long boat race in the backwaters of Kerala and many more.

Kerala is a land of many cultures and rituals and also has many types of dance forms like, Kathakali which is performed by large bright dresses and face masks and contains a lot of hand and facial gestures and expressions, Mohiniyattam is a dance form performed by women. Other dance forms include Chakyar Koothu, Nangiar Koothu, Theyyam, Panchavadyam, Ottamthullal and many others. The ancient battle art form of Kalaripayattu was originated from Kerala which was the bases of martial arts and other eastern battle forms.

The Kerala architecture is one of the unique forms of architecture which can prominently be found in Kerala and is different from the type of architecture found in rest of India. The architecture is influenced by the Indian Vedic and Dravidian architecture and is in contrast with the rest of the southern India. The houses and temples are mainly made of wood and bricks.

The state has a many centers for natural and Ayurvedic healing and thus is a huge attraction for people seeking natural therapy and herbal treatment. The state also have a good healthcare infrastructure and thus has a strong base for medical tourism for both Western and Eastern treatment and a lot of people from all over India and abroad come here for affordable treatment.

The state lies on the Western Ghats and has many hill stations and also has good biodiversity and has great potential for natural and wildlife tourism. Few of the hill stations include Devikulam hills, Ilaveezhapoonchira and many others. The state is also famous for its spice gardens and plantations and this is quite popular among the tourists.

The state of Kerala has wet evergreen forests and is home to various species of plants and animals. The state has many wildlife sanctuaries and national parks, like Chinnar Wildlife Sanctuary, Kumarakom Bird

Sanctuary, Periyar Wildlife Sanctuary, Peppara Wildlife Sanctuary, Mangalavanam Bird Sanctuary, Parambikulam Wildlife Sanctuary, Silent Valley National Park and many others. The state also has Nilgiri biosphere reserve and Agasthyamalai Biosphere Reserve.

Kerala has 6 national parks of total area of 558.158 Sq Km and 17 wildlife sanctuary present. The state is in the Western Ghats and is biological hotspot and presence of a diverse number of species makes it a good place for wildlife tourism and natural tourism.

### III. DATA SOURCES

**Domestic Tourism Survey, 2014-15, conducted by NSSO, is the main source of Domestic Tourism expenditure, a key statistic required for TSA**

Preparation of an RTSA for a state requires the following:

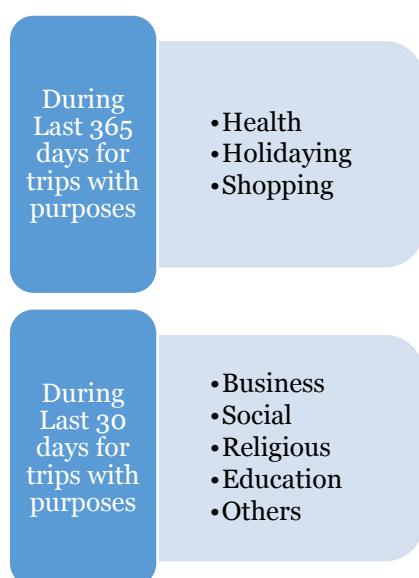
- Statistics on expenditures made by visitors on different products within the state.
- Statistics on supplies from the domestic production and imports (which include from other states) to meet these purchases of tourists.
- Confrontation of the two sets of statistics in the national accounting framework through the supply and use tables so that supplies from domestic production and imports match with the expenditures made by tourists.
- Estimate the value added out of the domestic production that is involved in supplying the products to tourists' purchases.
- Statistics on employment in tourism industries.

The reference year for the Third national-level TSA and the states RTSAs is 2015-16. Accordingly, to obtain the statistics listed above, the important data sources are the following:

- Domestic Tourism Survey conducted by NSSO in 2014-15.
- International Passenger Survey conducted by Indian Statistical Institute (ISI), Kolkata in 2015-16
- Employment-Unemployment Survey of NSSO, 2011-12
- Annual Employment-Unemployment Survey (Labour Bureau), 2015-16
- Consumer Expenditure Survey of NSSO, 2011-12
- Household Consumption on Durable Goods and Services, NSSO, 2014-15
- State Accounts by State Department of Economics and Statistics, 2012.



**DTS 2014-15 covered households which had at least one member who performed an overnight trip of the following criteria**



- Supply and Use Table (Central Statistics Office), 2012-13

### **III.1. Domestic Tourism Survey (DTS) – 2014-15**

The first Domestic Tourism survey was conducted by NCAER in 2002-03, which was used in the preparation of India's first TSA. For the second TSA, National Sample Survey Office (NSSO) conducted its first comprehensive survey on domestic tourism, called Domestic Tourism Survey, during the period July 2008 to June 2009. This was an all-India household survey and was carried out as part of NSSO's 65th Round of sample surveys.

Later during the period July 2014 to June 2015, NSSO carried out the similar survey on Domestic Tourism, in its 72nd round of survey. The purpose of the survey was primarily to provide requisite tourism related estimates for preparing the national as well as state-level TSAs.

As per the requirement of TSA, focus of the survey was on capturing the details of domestic overnight trips. Information on household characteristics, which are the important determinants of tourism characteristics, such as household size, principal industry, principal occupation, household type, religion, social group, household consumption expenditure, particulars of overnight trips completed during the reference period and expenditure incurred by the household on domestic tourism were captured. Regarding data on particulars of expenditure, break-up of expenditure by various components of accommodation; food and drink; transport; shopping; recreation etc. were collected. Besides, some information on same-day trips was also captured.

A stratified multi-stage design was adopted for this survey. The first stage units (FSU) were the census villages in the rural areas and Urban Frame Survey (UFS) blocks in the urban areas. The ultimate stage

units (USU) were households in both rural and urban areas. A total of 8001 villages in rural India and 6061 urban blocks in urban India were surveyed after selecting by Probability Proportional to Size with Replacement (PPSWR). In all, 79497 households from rural and 60191 from urban India were surveyed.

The households selected for the survey were those who met at least one of the following criteria:

- Have at least one member who performed overnight trip during last 365 days for the following leading purposes:

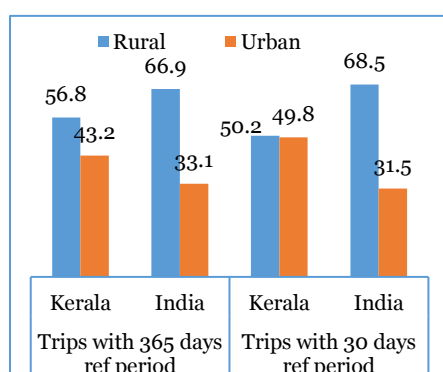
- Health & medical
- Holidaying, leisure & recreation
- Shopping

- Have at least one member who performed overnight trip during last 30 days for the following leading purposes:

- Business
- Social
- Religious & pilgrimage
- Education & training
- Others

The survey estimated total number of households in India to be 25.4 crore, of which 36.3 percent of the households reported at least one overnight trip. Note that this implies that 36.3 percent of the households reported at least one overnight trip with leading purposes holidaying, leisure and recreation; health & medical and shopping completed during last 365 days and/or business, social, religious & pilgrimage, education & training and others completed during last 30 days. This proportion is almost the same in rural and urban areas at 36.6 per cent and 35.7 percent respectively.

It may be noted that information on trips are collected differently for different leading purposes of trips, that is, reference period for some trips is 365 days and for others is 30 days. Hence, survey

**Figure III.1: Percent distribution trips by rural and urban areas**

Source: DTS 2014-15 and NCAER computation

captures all the trip characteristics for two sets of trips – one with 365 days reference period and other with 30 days reference period. Even the total number of trips is presented separately for these two sets of trips.

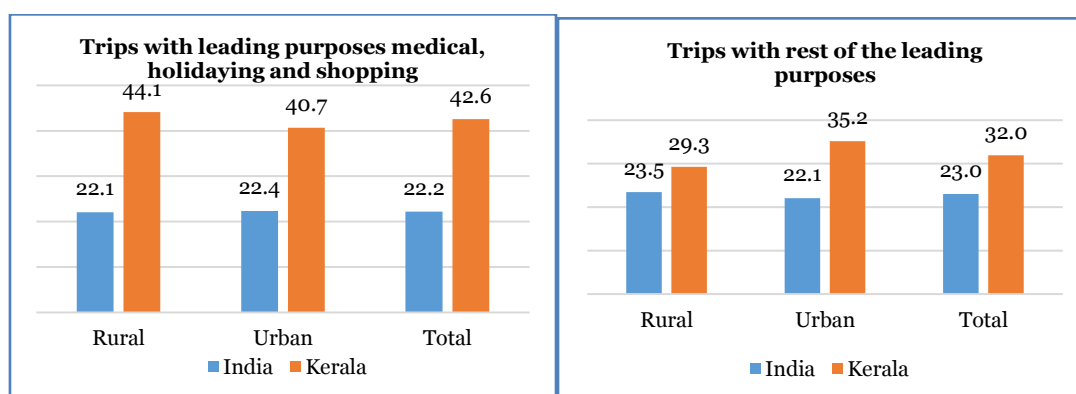
### Key DTS findings for Kerala

In Kerala, the sample number of households was 5805, comprising 3128 from rural areas and 2677 from urban areas. Number of sample households reporting overnight visitors were 4744. In other words, 81.72 per cent of the sample households reported overnight visitors.

The survey estimates the total number of households in Kerala to be 79.62 lakh. Of these, 38.72 lakh households (or 48.63 percent) reported having overnight visitors. The rural-urban breakup suggests that of the total visitor reporting households, 53.49 percent belonged to the rural areas. 56.8 per cent and 50.2 per cent of the overnight trips, with reference period 365 days (with purposes medical, holidaying and shopping) and 30 days respectively (with rest of the purposes), originated from rural areas of the state (Figure III.1)

The intensity of domestic tourism in each state is measured by the number of trips per 100 household during the reference period. With leading purposes medical, holidaying and shopping (with reference period of 365 days), a higher number of trips per 100 households originate from Kerala than the national average number of trips per 100 households. This is true for both rural and urban areas. Among all the states and UTs of India, Kerala ranks 4<sup>th</sup> position with respect to tourism intensity for trips with leading purposes medical, holidaying and shopping.

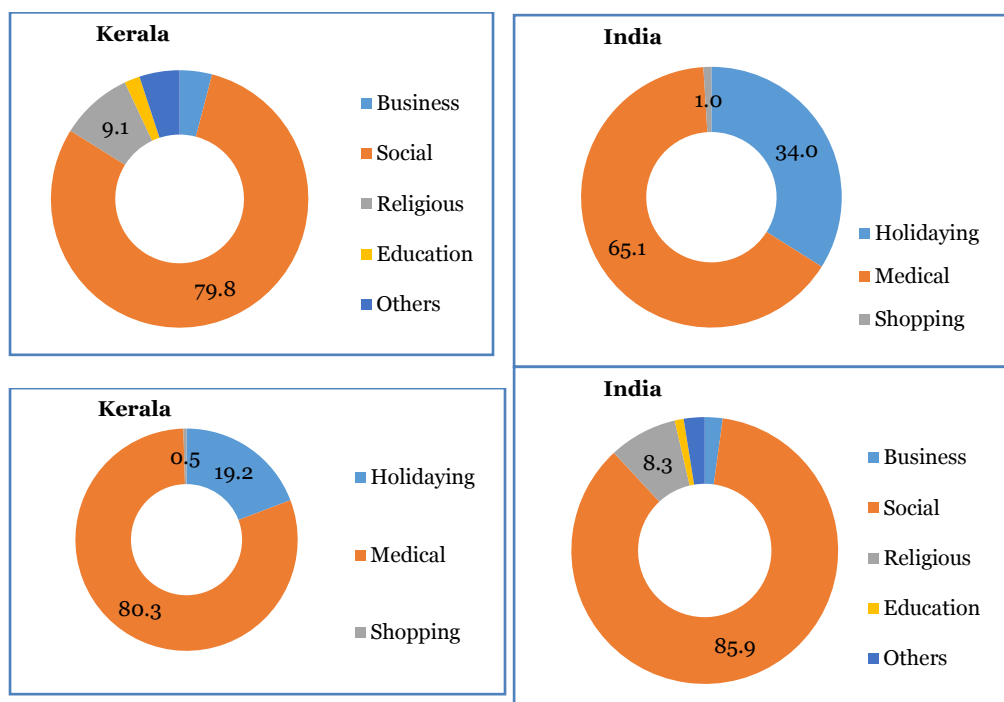
On the other hand, the tourism intensity for the rest of the leading purposes (with reference period of 30 days) is also higher than the national average. With regard to tourism intensity for these trips, Kerala secures 4<sup>th</sup> position among all states and UTs of India. (Figure III.2)

**Figure III.2: Average number of trips per household**

Source: DTS 2014-15 and NCAER computation

The distribution of overnight trips by leading purposes— medical, holidaying and shopping - reveal that people living in Kerala travel mostly for medical purpose. While at all-India level, among these three purposes, only 65.1 percent travel for medical purpose, in Kerala this proportion is 80.3 percent, followed by 19.2 percent for Holidaying.

The distribution of trips by rest of the purposes is not very different in Kerala from that in India. For both Kerala and all-India, most of the trips undertaken are for social purpose, accounting for 79.8 percent in Kerala and 85.9 percent in India, as a whole. (Figure III.3)

**Figure III.3: Distribution of trips by leading purposes**

Source: DTS 2014-15 and NCAER computation

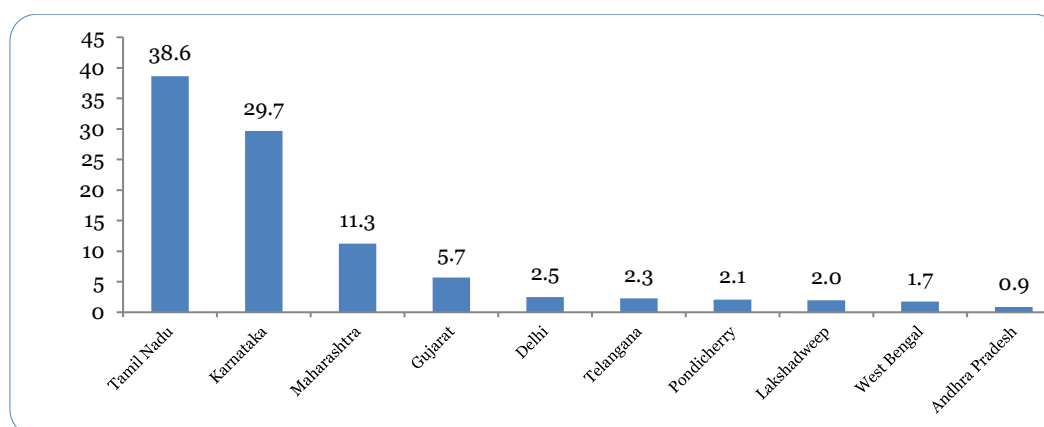
Most of the overnight trips, across all purposes, were undertaken within the state. This is true for almost all the states and hence is reflected in national average too. The following table presents the percent trips undertaken within the state, compared with all-India average. (Table III.1).

**Table III.1: Percent trips undertaken within the state**

	Kerala	All-India average
<b>Reference Period 365 days</b>		
Holidaying	43.0	65.9
Medical	97.1	91.8
Shopping	15.3	81.2
<b>Reference Period 30 days</b>		
Business	44.8	70.9
Social	95.1	93.1
Religious	69.7	75.0
Education	75.5	76.2
Others	92.9	84.0

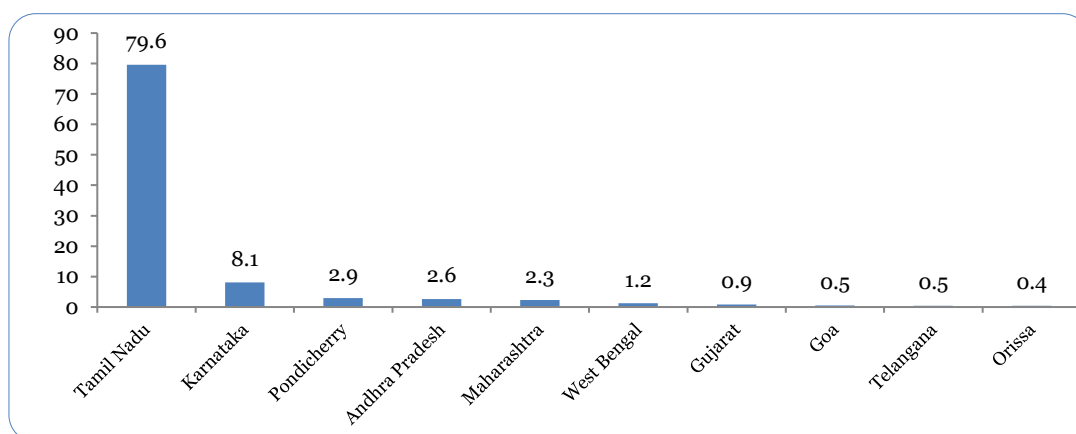
Source: DTS 2014-15 and NCAER computation

Among the trips undertaken from other states of India, the majority are undertaken from Tamil Nadu, Karnataka and Maharashtra. The percent distribution of trips undertaken from “outside state” is presented in Figure III.4a and Figure III.4b.

**Figure III.4a: Percent trips (with leading purposes holiday, medical and shopping and with 365-day reference period) to Kerala from top 10 other states**

Source: DTS 2014-15 and NCAER computation

**Figure III.4b: Percent trips (with leading purposes other than holiday, medical and shopping and with 30-day reference period) to Kerala from top 10 other states**



Source: DTS 2014-15 and NCAER computation

#### Use of DTS data for TSA

The DTS data that were used in the preparation of TSA for Kerala were the expenditure data by items of expenditure and by purpose of travel. These expenditures were collected for the tourists who travelled within the state providing information on Domestic Tourism Expenditure of the state.

Also these data were used to arrive at the expenditures of those tourists who belonged to other states of India but whose main destination was Kerala. This formed one part of Inbound Tourism Expenditure, the other part being expenditure of foreign tourists that visit the state, which was obtained from the International Passenger Survey.

**Types of tourists covered in IPS:**

- 1. Non-Resident Indians (NRIs)**
- 2. Persons of Indian origin (PIOs)**
- 3. Overseas citizens of India (OCIs)**
- 4. Other Foreigners**

**III.2. International Passenger Survey (IPS) – 2015-16**

MoT commissioned the Indian Statistical Institute (ISI), Kolkata to conduct the International Passenger Survey (IPS) for the year 2015-16. The survey targeted the following three categories of International tourists, namely.

- Foreign nationals visiting India,
- Non-Resident Indians visiting India, and
- Indian Residents travelling abroad.

A multistage sampling design was adopted to conduct the survey at each of the airports and land check posts. At the first stage, six airports, namely Bangalore, Chennai, Dabolim (Goa), Delhi, Kolkata and Mumbai were selected purposely keeping in mind the different geographical zones of India.

Among the remaining international airports, four other airports namely, Amritsar, Cochin, Hyderabad and Pune, were selected using sampling scheme with probability proportional to foreigner's departure volume in the year 2012 as its size measure.

Among the land posts, Haridaspur was selected purposely based on the experience from the previous IPS. Among the remaining land check posts, survey could be conducted at only two check posts, namely Changrabandha and Mahadipur.

**Use of IPS data for TSA**

The data from IPS can be used to obtain the expenditure incurred by the foreign tourists in India, by items of expenditure and by types of tourists, namely NRIs, PIOs, OCIs and other foreign tourists. These data are used in the preparation of TSA at national level.

For state-level TSA, the information on expenditure incurred in the state of destination could not be derived directly from the data. However, these are imputed using the expenditure incurred in the last places of night halt (LPNH). The respondents were asked to name these places, which are locations in the various states. The detailed methodology is discussed in the following chapter on



### Methodology.

For Kerala, the following locations were identified as LPNH by the respondents:

- Alappuzha
- Chettikulangara
- Kannur
- Kochi
- Kottayam
- Kovalam
- Kozhikkode
- Malayattoor
- Munnar
- Parumala
- Sabarimala
- Thekkadi
- Thiruvananthapuram
- Thrissur
- Varkala
- Tripunithura
- Ernakulam

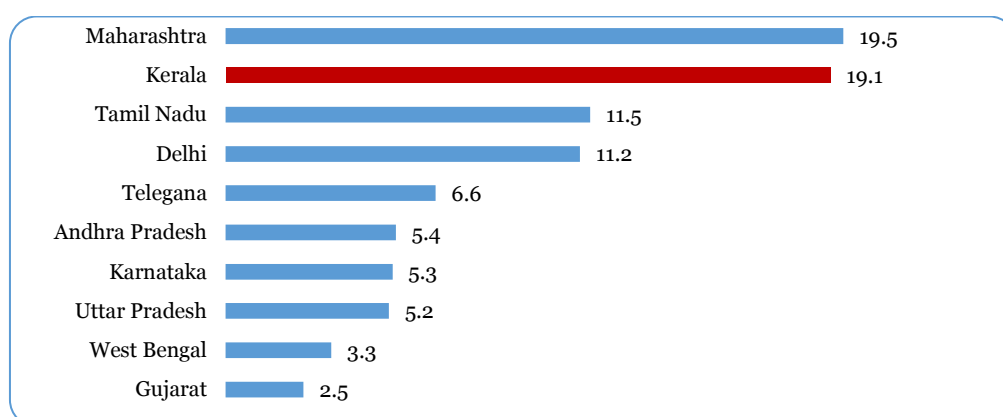
For outbound tourism, Indian residents travelling abroad were canvassed through a separate questionnaire focusing on Outbound Tourism. The data on pre-trip expenditure incurred by these tourists, before the actual outbound trip was undertaken, were collected. The survey provides information on the respondent's state of residence; hence we can obtain the data on number of tourists travelling abroad from each state and on their pre-trip expenditure which is assumed to have been largely incurred in the state of reference. These expenditures are obtained by the items of expenditure and by purpose of travel.

### Key IPS findings for Kerala

The estimated total number of all visitors coming to India is 83,290,78. Estimated total number of outbound Indians is 20,523,715. The age group 31 - 40 years was found to be the modal class for the Foreigners. Modal age group for Outbound passengers was 18 - 30 years.

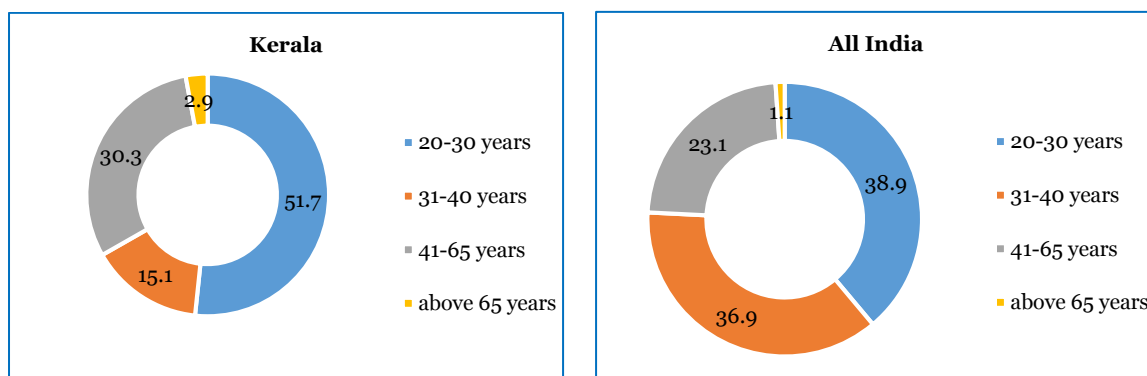
From Kerala, number of outbound tourists travelling abroad is estimated to be 3924148, which is 19.1 percent of total outbound tourists from India. This places Kerala at second position among all the states of India (Figure III.5).

**Figure III.5: Percentage share of Top 10 states in total Outbound Tourists**



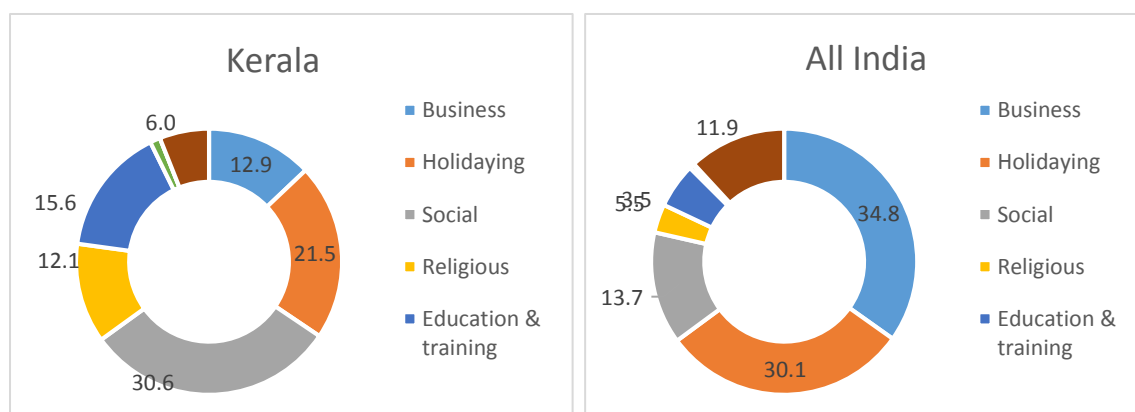
Source: IPS 2015-16 and NCAER computation

The distribution of outbound tourists by age groups reveal that of the total state residents travelling abroad, the majority (51.7 percent) belong to young age of 20 to 30 years. This is followed by 30.3 percent of those who belong to 41 to 65 years age group. As compared to this, at all- India level, 38.9 percent of outbound tourists belong to 20 to 30 years of age groups followed by 36.9 percent of these belong to 31 to 40 years of age group (Figure III.6)

**Figure III.6: Distribution of outbound tourists by age-groups**

Source: IPS 2015-16 and NCAER computation

The leading purpose of most of the outbound tourists travelling from Kerala to other countries is social. This is true for residents belonging to both rural and urban areas. This is in contrast with the distribution observed at all-India level (Figure III.7).

**Figure III.7: Distribution of Outbound tourists by leading purpose**

Source: IPS 2015-16 and NCAER computation

Three reference periods are used in quinquennial programme of NSSO these surveys

- one year
- one week
- Each day of the week.

Based on these three periods, Different measures of employment are arrived at.

### **III.3. Employment-Unemployment Survey NSSO (EUS) – 2011-12**

Employment and unemployment survey is part of the quinquennial programme of NSSO surveys. The quinquennial EUSs of NSSO aim to measure the extent of 'employment' and 'unemployment' in quantitative terms disaggregated by household and population characteristics. The persons surveyed are classified into various economic activity categories on the basis of the activities pursued by them during certain specified reference periods (Table III.2).

Three reference periods are used in these surveys. These are (i) one year, (ii) one week and (iii) each day of the week. Based on these three periods, three different measures of employment are arrived at, of which the one with 365 days reference period, called workforce according to 'usual status' approach, is widely used.

A stratified multi-stage design was adopted for the 68th round survey. The first stage units (FSU) were the 2001 census villages (Panchayat wards in case of Kerala) in the rural sector and Urban Frame Survey (UFS) blocks in the urban sector. The ultimate stage units (USU) were households in both the sectors.

The number of households surveyed was 1,01,724 (59,700 in rural areas and 42,024 in urban areas) and number of persons surveyed was 4,56,999 (2,80,763 in rural areas and 1,76,236 in urban areas).

#### **Key EUS findings for Kerala**

From Kerala, a total of 4460 households were surveyed with 2607 households from rural areas and the remaining from urban areas. From these households, 10659 persons were surveyed from rural and 7298 from urban areas.

The survey estimates the number of households to be 78 lakh in Kerala. With the average household size of 4, the survey estimates the total population at 3.12 crore. Table III.2 presents the estimated

number of workers by principal and subsidiary status.

**Table III.2: Estimated number of workers by status-Kerala (EUS-NSS)**

(NUMBERS IN LAKH)

Worker		Rural			Urban			All		
		Male	Female	Total	Male	Female	Total	Male	Female	Total
Principal	Own Account worker	17.0	5.0	22.0	6.5	1.9	8.3	23.4	6.9	30.3
	Employer	4.9	0.8	5.7	1.4	0.2	1.5	6.3	1.0	7.2
	Regular Employee	9.2	5.9	15.1	6.9	3.8	10.7	16.2	9.7	25.8
	Casual wage labour	26.8	7.8	34.6	6.8	1.3	8.1	33.6	9.1	42.7
	Total	57.9	19.5	77.4	21.6	7.1	28.7	79.5	26.6	106.1
Subsidiary	Own Account worker	4.7	4.5	9.2	0.9	1.1	2.0	5.6	5.7	11.2
	Employer	1.9	0.6	2.5	0.3	0.1	0.4	2.2	0.7	2.9
	Regular Employee	0.3	0.3	0.6	0.1	0.2	0.2	0.4	0.5	0.9
	Casual wage labour	2.8	4.4	7.2	0.7	0.2	0.9	3.5	4.6	8.1
	Total	9.7	9.8	19.5	2.0	1.6	3.6	11.6	11.4	23.1
Principal + Subsidiary	Own Account worker	21.7	9.5	31.2	7.3	3.0	10.3	29.0	12.5	41.5
	Employer	6.7	1.4	8.2	1.7	0.3	2.0	8.4	1.7	10.1
	Regular Employee	9.6	6.2	15.7	7.0	4.0	11.0	16.6	10.1	26.7
	Casual wage labour	29.5	12.2	41.8	7.5	1.5	9.0	37.1	13.7	50.8
	Total	67.5	29.4	96.9	23.6	8.7	32.3	91.1	38.1	129.2

Source: NSSO EUS, 2011-12

### Use of EUS for TSA

For the TSA tables, the employment data is based on usual activity status in both principal and subsidiary activities. The usual activity status (it is the activity situation in which a person is found during a reference period that relates to the person's participation in economic and non-economic activities) relates to the activity status of a person during the reference period of 365 days preceding the date of survey. The activity status on which a person spent relatively longer time (major time criterion) during the 365 days preceding the date of survey is considered the principal usual activity status of the person.

However, the latest EUS data conducted by NSSO is

available for the year 2011-12, whereas the reference year for state RTSA is 2015-16. Hence, we also make use of data on Employment and Unemployment from annual survey conducted by Labour Bureau.

The key employment numbers are generated from the Labour Bureau survey. But since these report employment numbers only till 3-digit level, NSS data are used for further disaggregation.

#### **III.4. Annual Employment-Unemployment Survey, Labour Bureau (EUS-LB)**

Ministry of Labour Bureau, government of India has been conducting Annual Employment-Unemployment Survey in the country since the year 2010. The first survey was conducted in 28 States/UTs by covering 300 districts. The second, third and Fourth Annual Employment-Unemployment Surveys were more comprehensive in terms of coverage as well as parameters estimated and conducted in all the States/UTs by covering all the districts in the country. The survey deals with important parameters namely Labour Force Participation Rate, Worker Population Ratio, Unemployment Rate based on Usual Principal Status Approach and Usual Principal & Subsidiary Status Approach, distribution of employed persons by different activity, extent of underemployment etc.

Field work for Fifth Annual Employment-Unemployment Survey was executed from April, 2015 to December, 2015 in all the 36 States/UTs by covering all the districts in the country. A moving reference period of last twelve completed months from the date of survey is used to derive various estimates of labour force and its derivatives.

The survey covered both rural and urban areas of the country. A total of about 7.82 lakh members were inquired from a sample of about 1.57 lakh households in the country. Of the total sample, about 57 per cent were drawn from rural areas where remaining 43 per cent were from urban areas. All the Labour Force Estimates have been derived for

persons aged 15 years and above only (Table III.3).

**Table III.3: Estimated number of workers by status- Andaman & Nicobar Islands  
(EUS-Labour Bureau) (NUMBERS IN LAKH)**

Worker		Rural			Urban			Total		
		Male	Female	Total	Male	Female	Total	Male	Female	Total
Principle	Own account worker	12.62	3.00	15.62	10.29	1.96	12.26	22.91	4.96	27.87
	Employer	1.39	1.04	2.42	0.92	0.36	1.29	2.31	1.40	3.71
	Regular employee	10.54	6.85	17.38	6.10	3.70	9.81	16.64	10.55	27.19
	Casual wage labour	21.10	5.12	26.21	14.55	5.07	19.62	35.64	10.19	45.83
	Total	45.64	16.00	61.64	31.87	11.10	42.97	77.51	27.10	104.61
Subsidiary	Own account worker	0.66	0.67	1.33	0.22	0.27	0.49	0.88	0.94	1.82
	Employer	0.04	0.12	0.16	0.30	0.21	0.51	0.34	0.33	0.67
	Regular employee	0.24	0.28	0.52	0.31	0.23	0.54	0.56	0.50	1.06
	Casual wage labour	1.88	1.93	3.81	1.39	1.47	2.86	3.27	3.40	6.67
	Total	2.82	2.99	5.81	2.23	2.17	4.40	5.05	5.16	10.22
Principle + Subsidiary	Own account worker	13.28	3.67	16.94	10.52	2.24	12.75	23.79	5.90	29.69
	Employer	1.42	1.15	2.58	1.23	0.57	1.80	2.65	1.72	4.38
	Regular employee	10.78	7.12	17.90	6.42	3.93	10.35	17.20	11.05	28.25
	Casual wage labour	22.97	7.05	30.02	15.94	6.54	22.48	38.92	13.59	52.50
	Total	48.46	18.99	67.45	34.11	13.27	47.38	82.56	32.26	114.82

Source: Annual Employment-Unemployment Survey, Labour Bureau, 2015.

### III.5. Consumer Expenditure Survey of NSSO (CES), 2011-12

NSSO has been conducting the 'Household Consumer Expenditure surveys' (CES) on quinquennial basis. The latest available CES data is for year 2011-12.

A stratified multi-stage design was adopted for the CES. . The number of households surveyed in 68th round was 101662 (59695 in rural areas and 41967 in urban areas).The prime aim of the CES was to generate estimates on monthly per capita consumer expenditure (MPCE) and its distribution across the different sections of the population like rural and

urban and different socio- economic groups etc. both at country level as well as the State level.

In the 68th round of CES, two types of schedules of enquiry, type 1 and type 2, were canvassed. The only difference in the two types of the schedules was the reference period used for collection of consumption data. Data from type 1 schedule has been used in the estimations used in State TSAs.

Schedule Type 1 was canvassed following the traditional way of the previous quinquennial CES rounds. For less frequently consumed items, the information was collected for last 30 days and last 365 days consumption while for more frequently used items like food and fuel etc. the information was collected for the last 30 days consumption only.

On the other hand, the reference periods for schedule type 2 were last 365 days (only) for the infrequently purchased items, last 7 days for very frequently consumed items like some of the food items, pan, tobacco and intoxicants etc. and last 30 days for other food items, fuel etc.

A very detailed item classification was adopted to collect information on consumption of more than 300 items consumed by the households. The items on which the information was collected include 142 items of food, 15 items of energy (fuel, light and household appliances), 28 items of clothing, bedding and footwear, 19 items of educational and medical expenses, 51 items of durable goods, and 89 other items. Other demographic information on household members like age, sex, educational attainment etc. were also collected through the CES schedules.



**Use of CES for TSA**

The main use of CES results in the preparation of TSAs is to estimate the product level ratios of tourist expenditures as percentage of overall household expenditures and these ratios are applied on the PFCE estimates coming from the national accounts statistics. This adjustment is important to ensure the overall consistency of survey results with the national accounts statistics. The data source on household expenditure table for the State TSAs is the 68th round of CES for the year

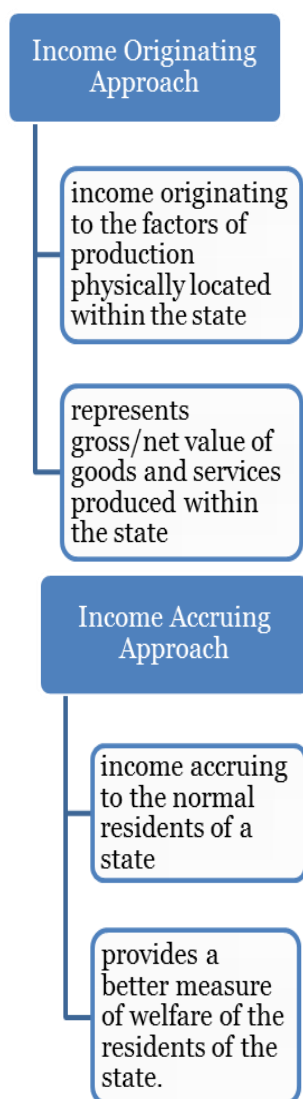
**Key CES findings for Kerala**

According to CES, MPCE (at MRP) on both food and non-food in rural and urban Kerala is higher than that for All India rural and urban MPCEs. Overall MPCE in rural Kerala (Rs. 2355.53) is about 45 percent higher than all India (Rs. 1287.17) and same for urban Kerala (Rs. 3044.22) is also about 19 percent higher than that for urban India (Rs. 2477.03) as given in table III.4

**Table III.4: Food and Non-Food Expenditure (MRP) in 2011-12**

		<b>Food Expenditure</b>	<b>Non-Food Expenditure</b>	<b>MPCE (MRP)</b>
<b>Kerala</b>	Rural	889.11	1466.42	2355.53
	Urban	1033.43	2010.79	3044.22
<b>All India</b>	Rural	621.96	665.21	1287.17
	Urban	922.91	1554.12	2477.03

Source: NSS 68<sup>th</sup> round, Key Indicators of Household Consumer Expenditure in India, 2011-12

**Approaches to State Income****III.6. State GDP Accounts, 2015–16**

At national level, the estimates of Gross Domestic Product are prepared and published annually by the Central Statistical Office (CSO). Similarly, at state-level, the State Domestic Product estimates are prepared annually by the State Directorate of Economics and Statistics (DES). The state DES is the nodal agency for the coordination of statistical activities in the state.

DES annually estimates the State Domestic Product (SDP) using the concepts and methodology approved by the System of National Accounts (SNA) of the international agencies and finalize after the reconciliation with CSO.

Like GDP, SDP is the monetary value of all the goods and services produced within the geographical boundaries of the state, without duplication, within a given period of time, generally a year. The goods cover all possible items like agricultural crops, livestock products, fisheries, forest products, manufacture of materials in the registered and unregistered sectors, construction of buildings, roads etc. Services cover medical and educational services, domestic services, hotels, restaurants, trade, transport and public services etc.

Conceptually, the estimates of State Income can be prepared by adopting two approaches, namely, income originating and income accruing. In the income originating approach, the measurement corresponds to income originating to the factors of production physically located within the geographical boundaries of the state and represents gross/net value of goods and services produced within the state. On the other hand, the income accruing approach relates to the income accruing to the normal residents of a state. Since this measures the income that become available to the residents of a state, it provides a better measure of welfare of the residents of the state.

However, for compiling the State Domestic Product (SDP) estimates by income accruing approach one

needs data on flows of factor incomes to/from the boundaries of state i.e. on inter-state flows as well as flows to/from abroad. Due to lack of availability of these data, presently, the estimates of SDP are compiled by the respective DES in the states following the income originating approach. Thus the current concept of compiling the Gross/Net SDP is similar to that of compiling the GDP/NDP of the entire economy i.e., measuring the volume in monetary terms, the total value of goods and services produced within the geographical boundary of the state.

The general methodology for compiling the estimates of state income is to first compile the estimates at disaggregated level for each economic activity and then aggregating them for the whole region/state.

In the preparation of State TSAs, the SDP accounts are used to arrive at the supply side information of the tourism industries. While the SDP data are not available for all of these industries, the national level ratios are used to disaggregate the available data (Table III.5).

### **III.7. SUPPLY AND USE TABLES (SUT), 2012-13**

The central framework of the SNA also provides for the compilation of supply and use tables (SUT) with a focus on the processes of production and consumption of individual types of goods and services. The SUTs depict, in matrices form, where the products come from and how they are used. Their main use is to act as an integration framework for balancing the national accounts, by recording how the supplies of different kinds of goods and services originate from domestic industries and imports, and how those supplies are allocated between various intermediate or final uses, including exports. The framework thus provides for balancing the supply and uses of each type of goods and services, without leaving the scope for discrepancies.

The SUTs build up on the concept that the amount of a product available for use within the economy must have been supplied either by domestic production or by imports. The same amount of the product entering an economy during an accounting period must be used for intermediate consumption, final consumption, capital formation (including changes in inventories) or exports. The TSA uses this framework to estimate tourism product shares, tourism industry shares, Gross Value Added Tourism Industries (GVATI), Tourism Direct Gross Value Added (TDGVA), and Tourism Direct Gross Domestic Product (TDGDP).

The Supply Table and Use Table are product by industry matrices but their entries are different. In the Supply Table, each column presents the values of products (kept in rows) produced by an industry or the products supplied by industries to the economy, distinguishing the domestic supply from foreign supply (imports). These are at basic prices. The total supply of each product at the purchasers' price has been obtained by adding taxes less subsidies on products and trade and transport margins.

On the other hand, a Use Table shows the use of the product (a good or service and kept in rows) by the type of use (kept in columns), that is, as intermediate consumption by industries, final consumption, gross capital formation and exports. They are all at purchasers' prices.

In India, the SUTs were not prepared until the Central Statistics Office (CSO) released India's first SUT for 2011–12 and 2012–13. These tables have been compiled at a level of disaggregation of 140 products and 66 industries. These 140 product groups have been taken up keeping in view the availability of product details from the data sources and also the products/items included in the compilation of the Index of Industrial Production (IIP). Similarly, 66 industries have been considered keeping in view the requirements of the NSA.

The total supply of goods and services available, as given in the Supply Table, is the sum of domestic production and imports. The domestic production or the value of output is at basic prices and the imports are inclusive of the Cost of Insurance and Freight (CIF). The CIF adjustment is done to bring them to Free on Board (FOB) prices. The domestic output matrix is at basic prices. This matrix is revalued since the use matrix is at the purchasers' prices. Hence, the supply matrix is revalued by adding taxes on products less subsidies on products and adding the trade and transport margins.

The Use Table is at the purchasers' prices (unbalanced), which, in turn, consists of three sub-matrices:

The intermediate use matrix, which shows the input requirements of goods and services for the production of output of each industry sector;

The final use matrix (final demand column vectors) shows categories of final uses as final consumption expenditure (FCE) by households, Non-profit Institutions Serving Households (NPISH) and the government, gross fixed capital formation, changes in stocks, valuables and exports of products; and The gross value added (row vector), at basic prices, which shows the components of value added by industry sectors.

In the Indian National Accounts, FCE by NPISH is not yet separately available. Thus, the private FCE comprising Household FCE and NPISH FCE has been adopted as the category of FCE and product-wise estimates of Private FCE (PFCE) have been obtained following the commodity flow approach. For the Third National TSA, India's SUT of 2012-13 has been used, but it has been updated for the TSA reference year of 2015-16, using the GVA and output data of 2015-16, at the most disaggregated level as available in NAS.

The updated SUT, comprising 140 products and 66 industries, has been aggregated to 25 industries and 25 products. The aggregated SUT has been used for

preparing the core table of TSA for deriving the Tourism Industry and Tourism Product Ratios. Further, this SUT has been converted into an Input-Output Table to derive the output and employment multipliers for the indirect contribution of the tourism sector.

At state-level, SUTs are not available. For the regional TSAs, state SUTs are prepared using the available state-level data on sectors' output and value added. These data are sourced from the CSO. These are used for the outer boundary elements of the SUTs whereas for inter-industry supply and use transactions, national level ratios are used. The state-level SUTs form the Production account of tourism industries. The official GSDP account for the state, as available with CSO, is given in Table III.5

**Table III.5: Gross Value Added by Economic activity at Current prices of Kerala**

(RS. IN LAKH)

S.No.	Item	2011-12	2012-13	2013-14	2014-15	2015-16
1.	Agriculture, forestry and fishing	4837594	5036409	5501261	6093554	4284637
1.1	Crops	2904593	2640015	2837347	3048091	3201139
1.2	Livestock	1125351	1411393	1548294	1686131	192274
1.3	Forestry and logging	430286	469819	492782	655013	320062
1.4	Fishing and aquaculture	377363	515183	622837	704319	571162
2.	Mining and quarrying	272483	267683	401836	645948	2329074
	Primary	5110077	5304091	5903097	6739502	6613711
3.	Manufacturing	3420404	4054145	4069129	4295381	2338900
4.	Electricity, gas, water supply & other utility services	467898	538745	570824	490186	372743
5.	Construction	5308794	5544177	6436556	7013906	1855478
	Secondary	9197095	10137066	11076510	11799472	4567121
6.	Trade, repair, hotels and restaurants	5321692	6502369	7368355	8399612	3423589
6.1	Trade & repair services	4732163	5849587	6657209	7656877	3303168
6.2	Hotels & restaurants	589529	652782	711146	742735	120421
7.	Transport, storage, communication & services related to broadcasting	2797969	3110217	3608615	3890330	1353865
7.1	Railways	98140	119548	126962	150752	298801
7.2	Road transport	2001208	2237489	2591554	2715970	588398
7.3	Water transport	28281	24400	20105	24842	4467
7.4	Air transport	26891	52009	42831	72887	30325
7.5	Services incidental to transport	61793	59010	69440	76289	52989
7.6	Storage	3317	3736	2877	3041	9657
7.7	Communication & services related to broadcasting	578340	614025	754846	846550	369228
8.	Financial services	1430848	1629698	1853055	2083412	612070
9.	Real estate, ownership of dwelling & professional services	4220948	5223391	6190742	7131837	1432393
10.	Public administration	1585585	1718357	1874509	1746538	1291575
11.	Other services	3965096	4503098	5035147	5390216	2033535
	Tertiary	19322138	22687130	25930423	28641945	10147027
12.	TOTAL GSVA at basic prices	33629310	38128287	42910029	47180920	21327859
13.	Taxes on Products	3407148	3997082	4455259	4890426	1945496
14.	Subsidies on products	631670	894069	861168	814941	645770
15.	Gross State Domestic Product	36404788	41231300	46504121	51256405	22627585
16.	Population ('00)	335015	336662	338174	339843	331010
17.	Per Capita GSDP (Rs.)	108666	122471	137515	150824	68359

Source: Central Statistical Office

## IV. METHODOLOGY

There are two main types of approaches to prepare the regional TSAs – Regionalisation or Top-bottom approach and

Regional estimation or Bottom-up approach. While regionalization approach requires the existence of national TSA, regional estimation requires the availability of SUT for each region.

The advantage of regionalisation approach is that the TSAs for each region are consistent with each other with respect to concepts and methodology. On the flip side, there is a disadvantage of overlooking regional specific details.

With regard to regional estimation approach, the advantage is that the regional specific details are taken into account as the approach is based on regional information. However, the disadvantage is that the regional TSAs may not be consistent or comparable with other region TSAs or even national TSA.

In Indian context, regionalization approach is more appropriate, mainly due to the non-availability of SUT at state level. The state TSAs for 2009-10 were also prepared using this approach, while the available state tourism statistics were used to the extent possible.

Table IV.1 presents the suitability of these approaches based on the status of availability of requisite information:



**Table IV.1: Availability of data for compiling State TSAs according to different approaches**

<b>Approach</b>	<b>Data requirement</b>	<b>Data availability</b>
<b>Regional estimation (bottom-up)</b>	Statistics on expenditures made by visitors on different products within the state	Data is available from the DTS, 2014-15 and IPS, 2015-16 (subject to some assumptions)
	Statistics on supplies from the domestic production and imports (which include from other states) to meet these purchases of tourists	- Data on supplies from domestic production is available - Data on imports at state level is not available
	Confrontation of the two sets of statistics in the national accounting framework through the supply and use tables so that supplies from domestic production and imports match with the expenditures made by tourists	- In the absence of data on imports, it is not possible to compile SUT at state level. - However, State SUT can be constructed for domestic supplies and total of capital formation and net exports as other final demand in the use table. - This SUT though not suitable for TSA, can be used for estimating indirect effects of tourism consumption, value added and employment. -
	Estimate value added out of the domestic production that is involved in supplying products for tourists' purchases	- Not possible, as how much of domestic production is able to meet the tourists' demand is not known in the absence of information on imports. - However, it is possible to compute GVATI and TDGVA using national tourism ratios of output of industries, as suggested in the TSA: RMF 2008.
<b>Regionalisation (top-down)</b>	National TSA and tourism ratios by products and industries	Available
	State level tourism consumption	Available
	State level estimates of output and value added by tourism and other industries	Available
	State level estimates of employment by tourism and other industries	Available

*Source: NCAER compilation*

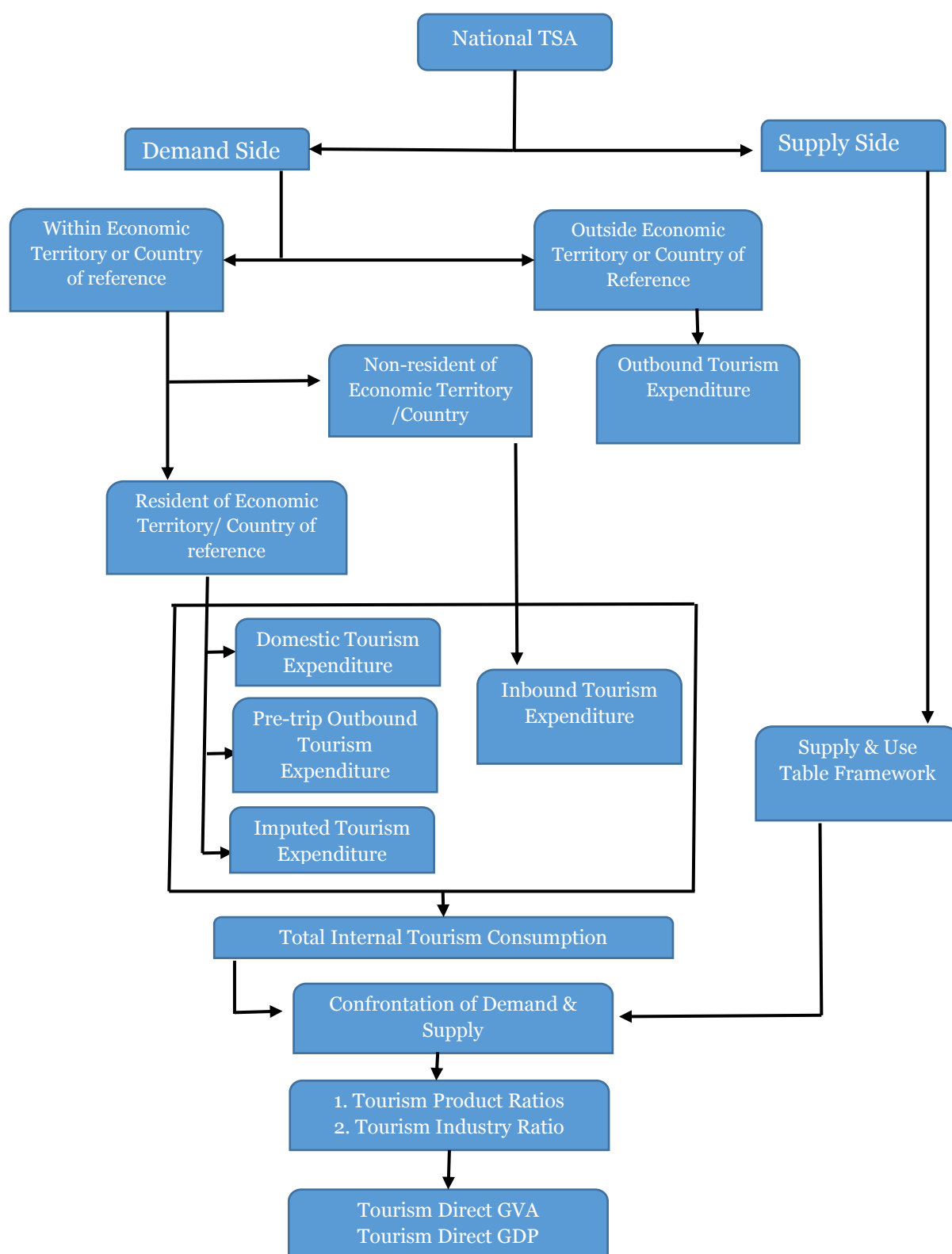
Hence, for Indian states, the RTSAs are prepared by:

- using the Regionalization approach;
- using the tourism industry ratios from national TSA and other state characteristics to derive the state-level tourism industry ratios; and
- applying these on the output of the respective industries in the state.

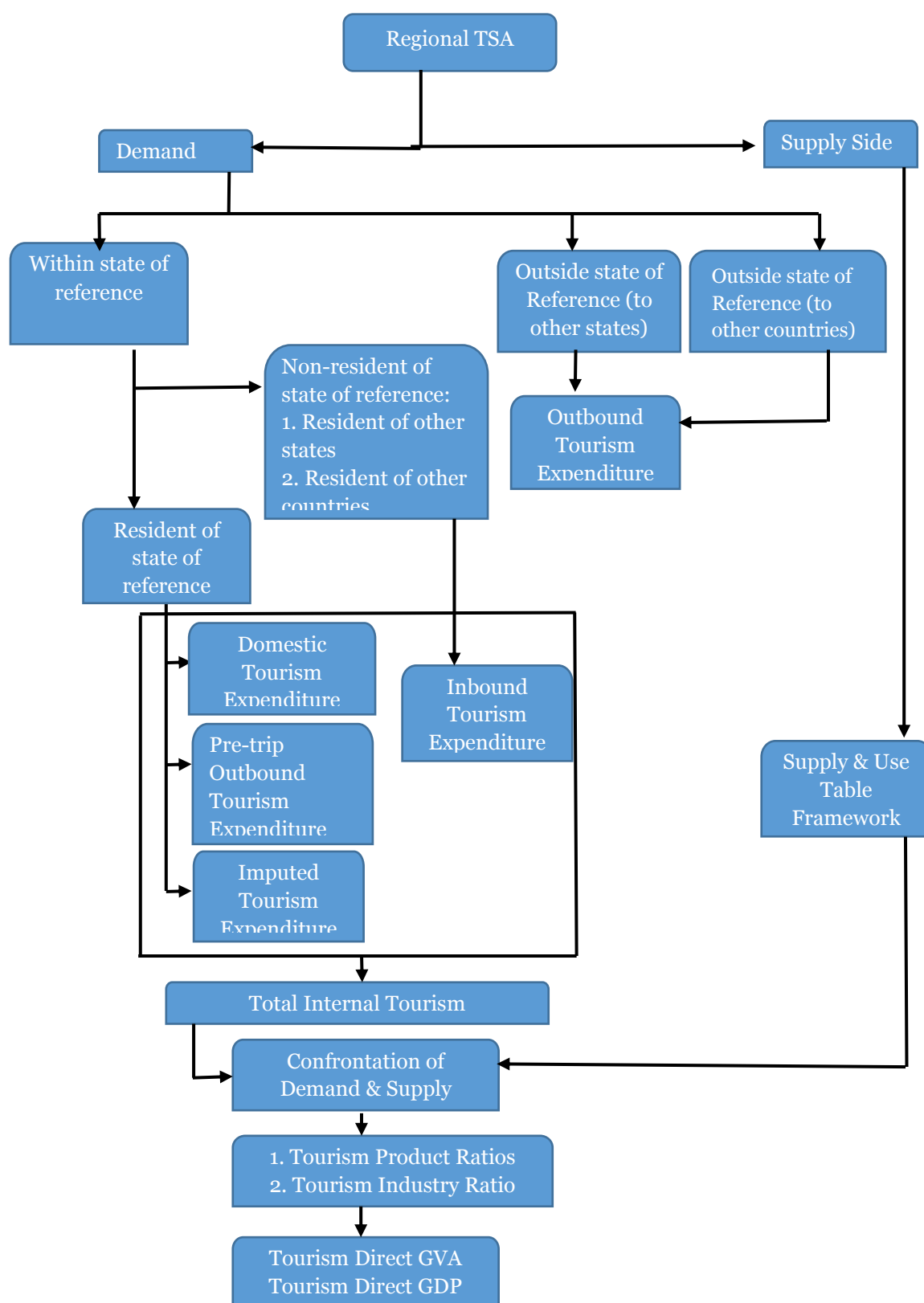
#### **IV.1. TSA Framework**

Tourism consumption representing Total Tourism Demand is the key component of a TSA. The concepts and definitions of components of Tourism consumption are different in national and regional TSAs. The other key component is the Supply of tourism industries. The confrontation of the demand and supply is the core element of the TSA framework as this confrontation results in Tourism Product and Industry Ratios, which enable the computation of Tourism Direct Gross Value Added (TDGVA) and Tourism Direct Gross Domestic Product (TDGDP). The following figure (Figure Iv.1 and Iv.2) presents the difference in the consumption concepts of national and regional TSAs and also presents their complete framework:

**Figure IV.1: Conceptual Framework of National TSA**



**Figure IV.2: Conceptual Framework of State TSA**



## IV.2. Compilation of State TSAs

According to the UNWTO's TSA: RMF-2008, TSA comprises of the following 10 standard Tables:

1. Inbound Tourism Expenditure
2. Domestic Tourism Expenditure
3. Outbound Tre-trip Tourism Expenditure
4. Total Internal Tourism Consumption
5. Production Account of Tourism Industries
6. Supply and Internal Tourism Consumption
7. Tourism Employment
8. Tourism Gross Fixed Capital Formation
9. Tourism Collective Consumption
10. Non-Monetary Tourism Indicators

As mentioned earlier, we broadly follow Regionalisation approach for the preparation of RTSAs. However, with the information that is available at State level in India, it is possible to compile TSA Tables 1 to 5 and 7 without much difficulty, though some assumptions would need to be made for this. Also, Tables 8 and 9 on Tourism Gross Fixed Capital Formation and Tourism Collective Consumption respectively cannot be included in the State TSAs due to the non-availability of these data at state level.

Before presenting the description of the state TSA Tables, it is important to mention that TSA: RMF 2008 (Table IV.2) recommends certain set of activities and products to be included while compiling the TSA. While some of the activities have been specified distinctly, some are recommended to be country-specific. Accordingly, a comprehensive set of activities and products were identified in the compilation of national as well as state TSAs. Both the recommended and the adopted classifications separately for products and activities are shown in the table below.

**Table IV.2: Products recommended in TSA: RMF 2008 Vs. Products included in TSA, 2015-16**

<b>Products Recommended in the TSA: RMF 2008</b>	<b>Products Used for TSA in India</b>
Accommodation services for visitors	Hotels
Food and beverage serving services	Restaurants
Railway passenger transport services	Railway passenger transport services
Road passenger transport services	Land passenger transport including via pipeline
Water passenger transport services	Water passenger transport
Air passenger transport services	Air passenger transport
Transport equipment rental services	Renting of transport equipment
Travel agencies and other reservation services	Tourism related supporting and auxiliary transport activities
Cultural services	Cultural and religious services
Sports and recreational services	Sporting and recreational services
Country-specific tourism characteristic goods	Medical and health
Country-specific tourism characteristic services	Processed food products
	Beverages
	Tobacco products
	Readymade garments
	Printing and publishing
	Leather footwear
	Travel related consumer goods
	Soaps and cosmetics
	Gems and jewellery

Source: NCAER compilation

### IV.3. Inbound Tourism Expenditure

Inbound Tourism Expenditure forms Table 1 of the TSA. At regional or state level, inbound tourism expenditure comprises of expenditure incurred by visitors from other countries as well as by those from other states of the same country. These expenditures are incurred within the state of reference on tourism characteristic and tourism connected products and services. An inbound tourism trip refers to the travel of a visitor from the time of arriving in a country/state to the time of leaving that country/state.

**Inbound Tourism Expenditure incurred by international tourists:**

The data on Inbound Tourism Expenditure were collected through the International Passenger Survey (IPS), 2015-16, conducted by the Indian Statistical Institute (ISI), Kolkata. The national-level estimates could be easily derived and are reported in the Third Tourism Satellite Account of India, 2015-16. However, for the state-level estimates, it is important to capture data on expenditure incurred in the state of destination by an inbound tourist visiting that state. It may also be noted that the inbound tourist may have travelled to one or more number of states. For obvious reasons, the survey data does not capture the expenses incurred in each of these states of destination, separately.

Nonetheless, the survey does ask the respondents to give the names of last place of night halt (LPNH). The detailed information on item-wise expenses incurred at LPNH were also collected, besides the expenditure incurred during the entire trip to India. We have imputed the inbound tourism expenditure incurred by the international tourists using these data on expenditure at LPNH.

These places of night halt were mapped with the states they are located in. An aggregation of the expenditure incurred, by each item separately, in all of the places located in a particular state were used to get the expenditure pattern in that state. The number of tourists reporting these expenditures were also obtained.

These expenditure data were inflated to account for the package component and for the amount paid of reimbursed by government or others. Since package and reimbursed components could not be obtained by states, the national level factor is used to inflate them.

Such obtained expenditure by types of tourists for the state of reference is used to get the per-tourist item-wise expenditure. This is because these expenditures are based on only few locations within the state which

were the last places of night halt.

Further, to arrive at the actual imputed item-wise expenditure, the per-tourist expenditure was applied on the number of tourist arrivals in the state, as provided by the Ministry of Tourism's India Tourism Statistics<sup>1</sup> for 2017.

Hence, the imputed state-level Inbound Tourism Expenditure from other countries is obtained for the state of reference. This is presented in TSA Table 1A.

A total of 5.6 Lakh residents from other countries are estimated to have travelled to the state of reference as inbound international tourists during 2015-16. Of these, maximum (58.24 percent) belonged to NRI category, followed by 35.78 percent 'others' tourists (Figure IV.3).

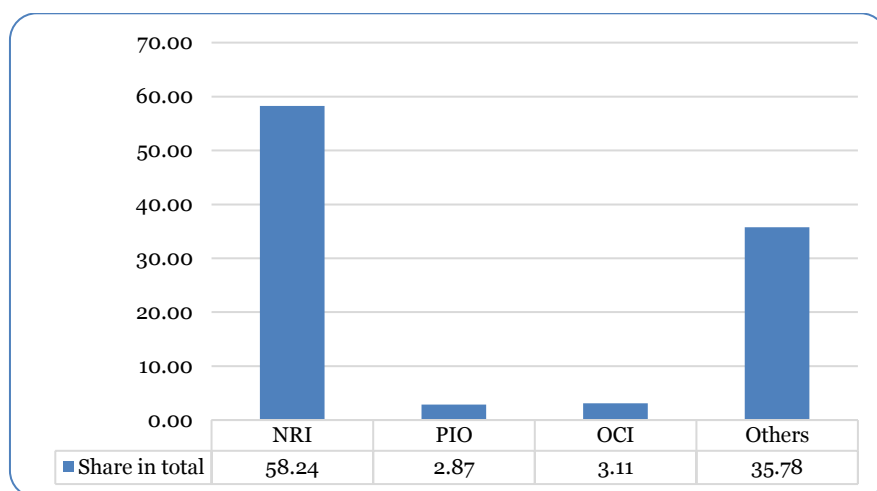
The following figure (Figure IV.4) presents the average per-tourist expenditure incurred by an international tourist visiting the state of reference. The average per-tourist expenditure is estimated at Rs 48,396.

Figure IV.5 presents the percent distribution of expenditure by major items of consumption.

<sup>1</sup> It may be noted that India Tourism Statistics reports the number of Foreign Tourist Visits (FTV) by states. Also available is the total number of tourist arrivals (FTA) in the country as a whole. The ratio of national level FTV and FTA is applied on state-level FTV to arrive at state-level FTA.

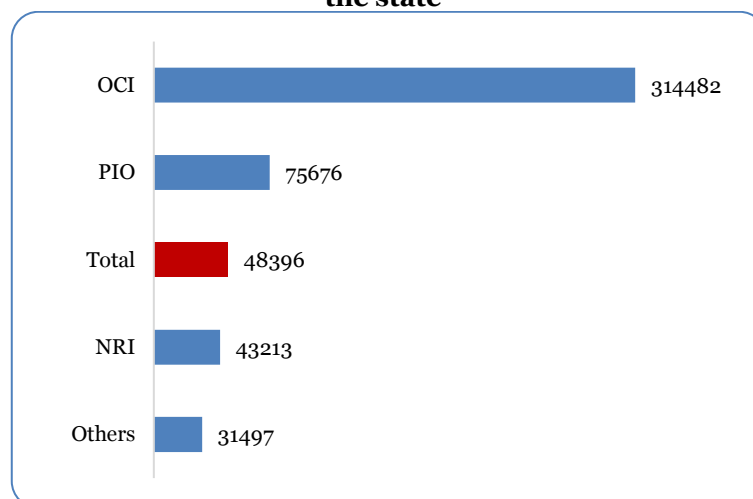


**Figure IV.3: Percent distribution of International inbound tourists**



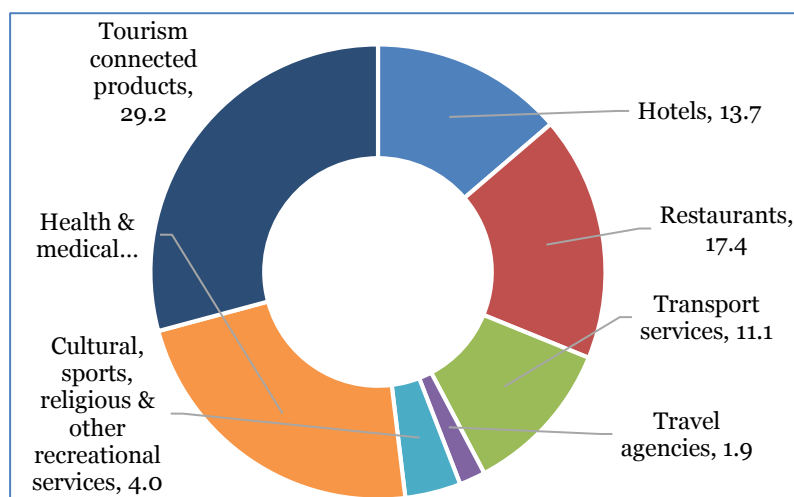
Source: NCAER computation using IPS-2015-16

**Figure IV.4: Average per-tourist expenditure (Rs.) incurred by international tourist in the state**



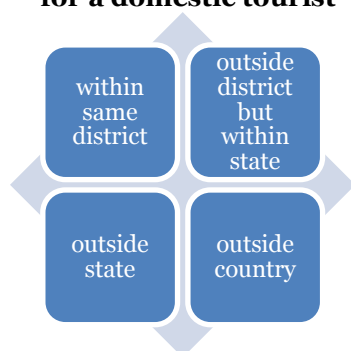
Source: NCAER computation using IPS-2015-16

**Figure IV.5: Percent distribution of Inbound Tourism Expenditure (incurred by international tourists) by products and services**



Source: NCAER computation using IPS-2015-16

**Figure IV.6: Main destination for a domestic tourist**



#### **Inbound Tourism Expenditure incurred by tourists arriving from other states:**

The state-level inbound tourism also includes tourism activities of visitors from other states of India, to the state of reference. Hence, this component is part of domestic tourism activities for which the tourism expenditures were collected in the Domestic Tourism Survey (DTS), conducted by the National Sample Survey Organisation (NSSO) during 2014–15.

This survey collected comprehensive information on the expenditure incurred by tourists on a detailed set of items which were mapped with the tourism characteristic and tourism connected (together called tourism-specific) products and services. Also collected was the information on the place of destination, which was categorized as given in Figure IV.5.

The data on item-wise expenditure incurred during the overnight trips originating from any state (other than the state of reference) and for which main destination was the state of reference, were collected to arrive at this component of inbound tourism expenditure. These expenditures were estimated by the leading purpose of the trip.

The table on this component of inbound tourism is prepared by each leading purpose of travel, that is, business, leisure, social, religious, educational, medical, shopping, and others.

Also added are the package component of the expenditure and the amount paid or reimbursed by government or others.

The item-wise expenditures are also adjusted for the under-estimation observed in such data when collected through household surveys. This under-estimation results from the inability to recall the expenses and in some cases, reluctance to report the actual expenses. The under-estimation is established when household consumption expenditure collected through survey are compared with the Private Final Consumption Expenditure (PFCE) given in the National Accounts Statistics. The factors for adjusting this under-estimation at state-level are assumed to be the same as those for All-India.

The item-wise adjustment factors are presented in the table below:

**Table IV.3: Consumption Expenditure Adjustment Factors**

<b>Tourism-specific Products/Services</b>	<b>Adjustment Factors 2015–</b>
<b>A 1. Tourism characteristic products</b>	
1. Accommodation services/hotels	1.00
2. Food and beverage serving services/restaurants	1.48
3. Railway passenger transport services	1.32
4. Road passenger transport services	5.68
5. Water passenger transport services	11.93
6. Air passenger transport services	6.81
7. Transport equipment rental services	1.00
8. Travel agencies and other reservation services/supporting and auxiliary transport activities	6.71
9. Cultural and religious services	0.10
10. Sports and other recreational services	0.10
11. Health and medical related services	1.21
<b>A.2 Tourism connected products</b>	
12. Readymade garments	1.81
13. Processed food	1.32
14. Alcohol and tobacco products	3.24
16 Travel-related consumer goods	1.74
17 Footwear	2.49
18 Soaps, cosmetics and glycerine	0.82
19 Gems and jewellery	1.45
20 Books, journals, magazines, stationery, etc.	0.53

Source: NCAER computation

Further, since the reference period for the RTSA is 2015–16, we have imputed the number of trips by purposes, using the growth seen in the number of domestic tourist visits in 2015-16 over 2014-15.<sup>2</sup>

Also item-wise price adjustment is done due to price change between 2014-15 and 2015-16.

The estimated number of trips for 365-day reference period is taken as it is. For 30-day reference period, the estimated number of trips is imputed by applying the ratio of 365-day to 30-day trips as found in DTS-2008-09 on it (Refer to Technical Note of “Third Tourism Satellite Account for India – 2015-16”).

<sup>2</sup> Refer to India Tourism Statistics, 2017.

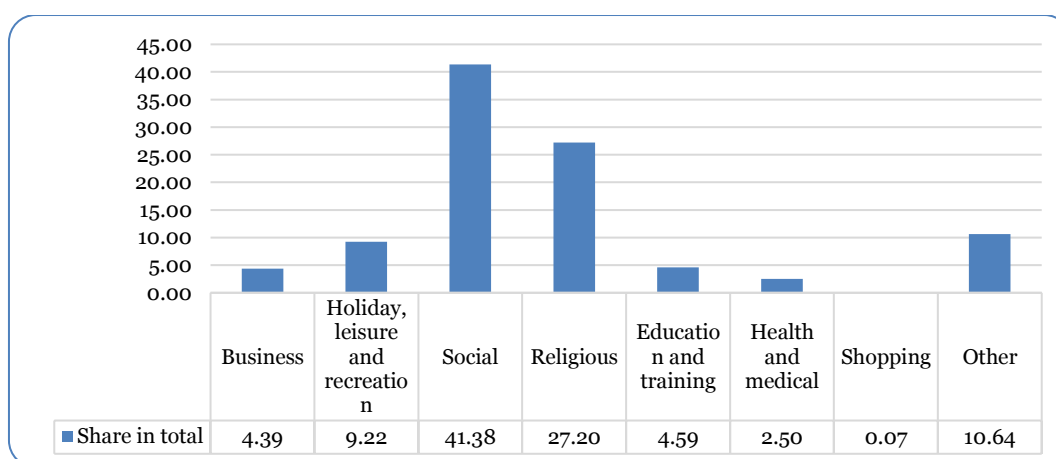
Hence obtained table on expenditure is presented in the TSA Table 1B on Inbound Tourism Expenditure incurred by tourists from other states to the state of reference.

A total of 34.10 Lakh residents of other states are estimated to have travelled as inbound tourists to the state of reference during 2015-16. Of these, maximum (41.38 percent) travelled for social purpose, followed by 27.2 percent who travelled for religious purpose (Figure IV.7).

Figure IV.8 presents the average per-tourist expenditure incurred by tourists from other states visiting the state of reference. The average per-tourist expenditure is estimated at Rs. 16060.

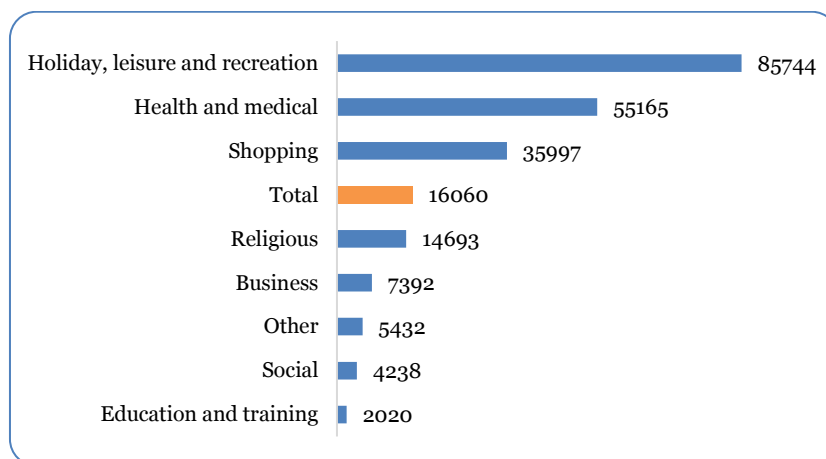
Figure IV.9 presents the percent distribution of expenditure by major items of consumption.

**Figure IV.7: Percent distribution of inbound tourists from other states to the state of reference by leading purposes of travel**



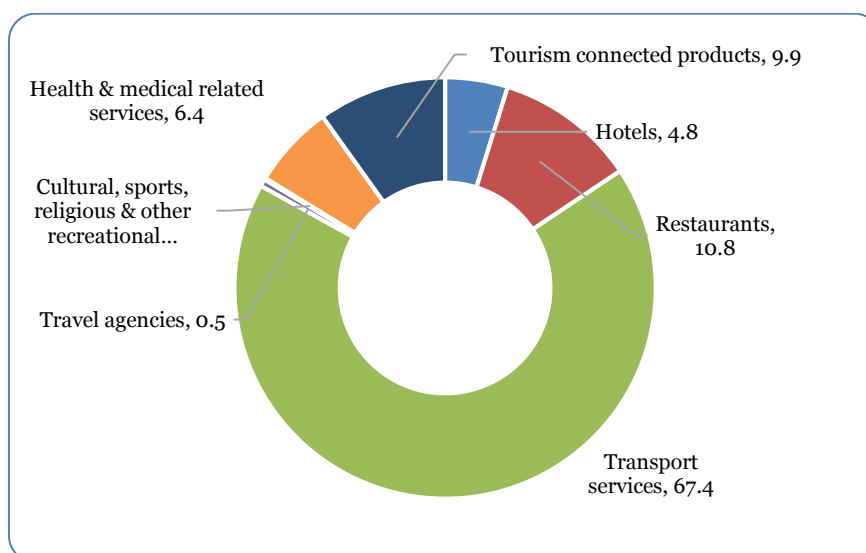
Source: NCAER computation using DTS 2014-15

**Figure IV.8: Average per-tourist expenditure (Rs.) incurred by tourists from other states to the state of reference**



Source: NCAER computation using DTS, 2014-15

**Figure IV.9: Percent distribution of Inbound Tourism Expenditure (incurred by tourists from other states) by products and services**



Source: NCAER computation using DTS, 2014-15

#### **IV.4. Domestic Tourism Expenditure**

TSA Table 2 focuses on domestic tourism by products and by purpose of travel. This table presents the Domestic Tourism Expenditure which refers to the expenditure of a resident visitor within the economy of reference. At state level, this table refers to tourists from within the state that is tourists living in the state of reference travelling to another place within the same state of reference.

According to the TSA: RMF 2008 recommendations, household surveys should be conducted to collect information on domestic tourism expenditure. According to IRTS 2008, “Because there are no international borders to cross, the observation of the flows of domestic tourism requires the use of different statistical procedures. As far as overnight tourism is concerned, accommodation statistics are an important statistical source of information on domestic and inbound visitors. Measurement challenges nonetheless arise with these statistics in terms of separating out visitors from other travelers, and domestic from inbound visitors. Information can also be obtained from household surveys by interviewing people about trips undertaken in a specified period”.

The domestic tourism expenditure was derived from the Domestic Tourism Survey (DTS), conducted by the National Sample Survey Organisation (NSSO) during 2008-09. The detailed information was collected on the expenditure incurred by tourists on a detailed set of items which were mapped with the tourism characteristic and tourism connected (together called tourism specific) products and services.

For state-level TSAs, domestic tourism expenditure incurred by tourists originating from a state and visiting another place of same state is taken under consideration.

The methodology used for estimation of expenditure is the same as used for estimating the inbound tourism expenditure incurred by tourists from other states to state of reference.

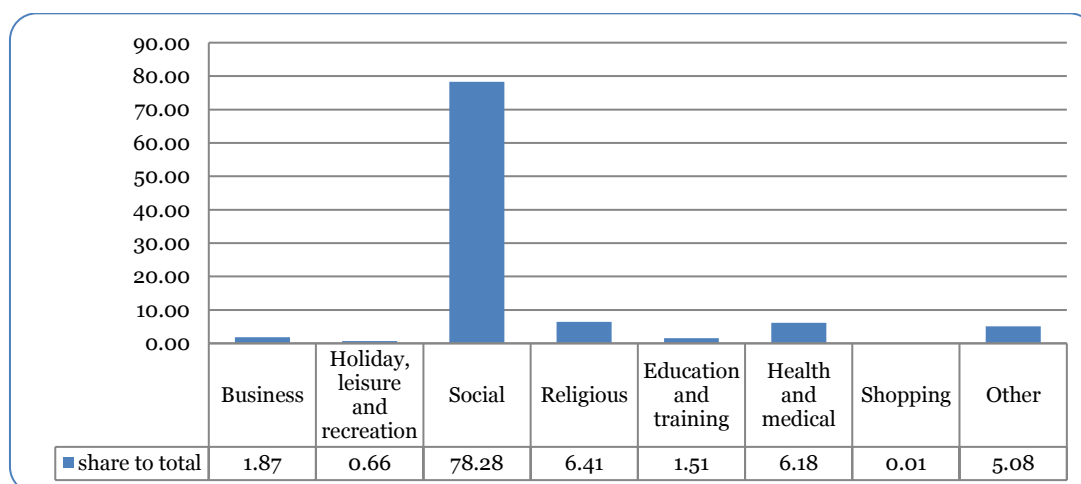
The estimated domestic tourism expenditure incurred by tourists within the state of reference is presented in TSA Table 2.

A total of 481.5 Lakh residents of the state are estimated to have travelled within the state as domestic tourists during 2015-16. Of these, maximum (78.28 percent) travelled for social purpose (Figure IV.10).

Figure IV.11 presents the average per-tourist expenditure incurred by tourists from within the state of reference. The average per-tourist expenditure is estimated at Rs. 4759.

Figure IV.12 presents the percent distribution of expenditure by major items of consumption.

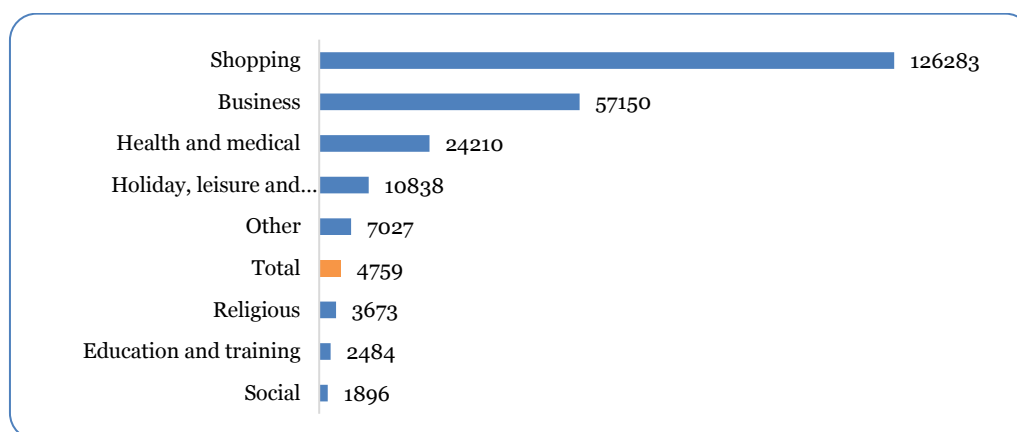
**Figure IV.10: Percent distribution of domestic tourists by leading purposes of travel**



Source: NCAER computation using DTS 2014-15

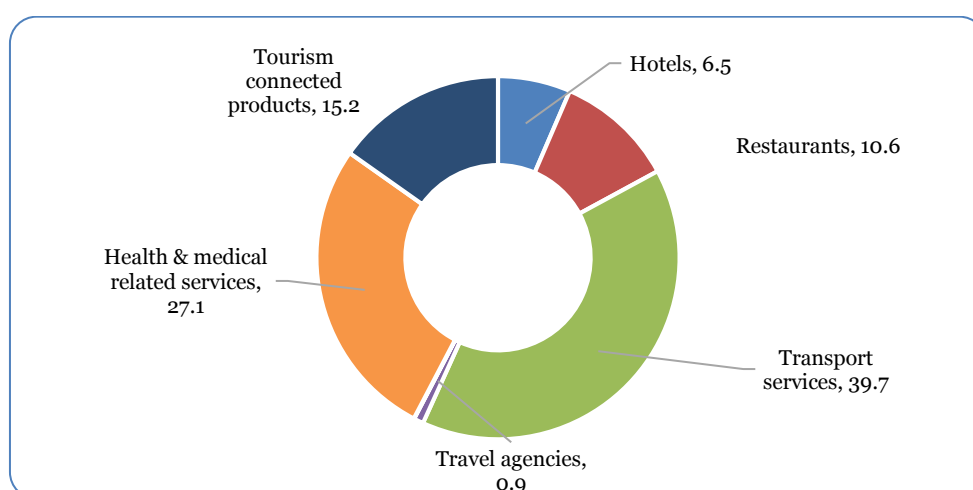


**Figure IV.11: Average per-tourist expenditure (Rs.) incurred by tourists from within the state of reference**



Source: NCAER computation using DTS 2014-15

**Figure IV.12: Percent distribution of Domestic Tourism Expenditure (incurred by tourists from within the state) by products and services**



Source: NCAER computation using DTS 2014-15

#### **IV.5. Outbound Pre-trip Tourism Expenditure**

TSA Table 3 focuses on outbound tourism. This table presents the tourism expenditure incurred by resident visitors outside the country of reference on tourism characteristic and tourism connected products and services, respectively. This expenditure could have been incurred either as part of an outbound tourism trip or as part of a domestic trip. Both correspond to the travel between leaving the place of residence and returning. However, a domestic trip has a main destination within the country of residence of the traveller, while an outbound trip has a main destination outside this country.

At state-level, outbound trip refers to the trip undertaken by the resident of the state of reference outside the country and also that undertaken in another state of the country. The expenditure, which is taken into account in both the cases, is the pre-trip expenditure, that is, the expenditure undertaken within the state of reference before the actual trip starts. This expenditure is mainly on shopping items purchased in the preparation of the outbound trip or transport services used to travel from residence to final port of exit to other country or state.

The data on outbound tourism pre-trip expenditure incurred by residents travelling abroad were collected in a separate survey conducted by the ISI, Kolkata, which was a part of IPS. However, data on expenditure incurred by resident visitors travelling to other states of India was beyond the scope of any survey – DTS or IPS.

The pre-trip expenditure incurred by outbound tourists was recorded for a detailed set of items and was mapped with the tourism characteristic and tourism connected products and services. The mapping of consumption items with the tourism-specific products and services is the same as that in the case of inbound tourism expenditure (TSA

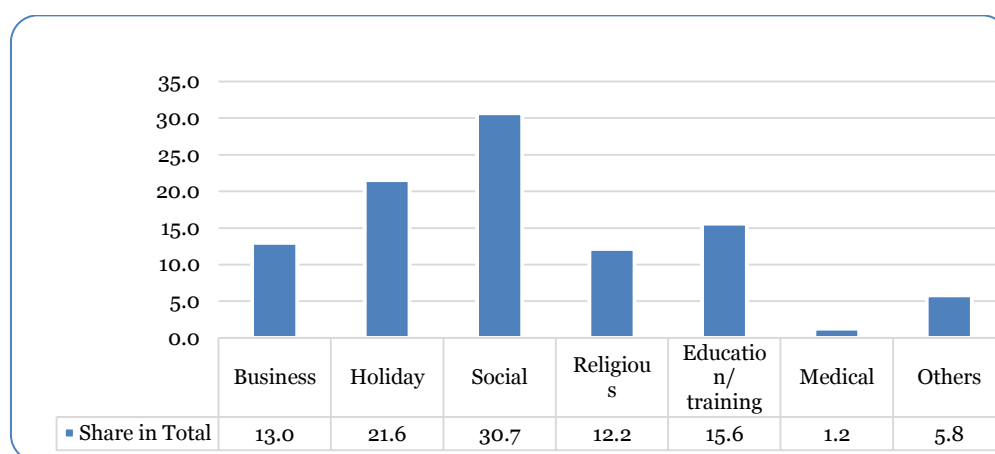
Table 1). The total item-wise expenditure incurred by outbound tourists within the state is presented in TSA Table 3.

A total of 39.14 lakh residents of the state are estimated to have travelled abroad as outbound tourists during 2015-16. Of these, maximum (30.7 percent) travelled for social purpose, followed by 21.6 percent who travelled for holiday (Figure IV.13).

Figure IV.14 presents the average per-tourist expenditure incurred by outbound tourists originating from the state of reference. The average per-tourist expenditure is estimated at Rs. 16955.

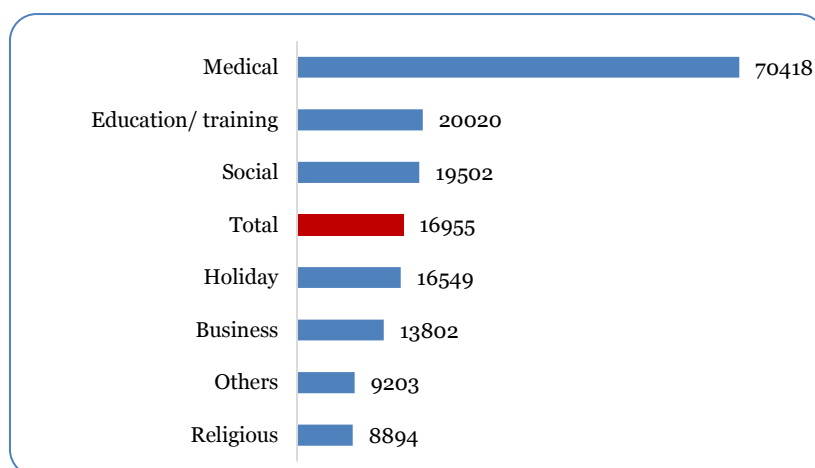
Figure IV.15 presents the percent distribution of expenditure by major items of consumption.

**Figure IV.13: Percent distribution of outbound tourists by leading purposes of travel**



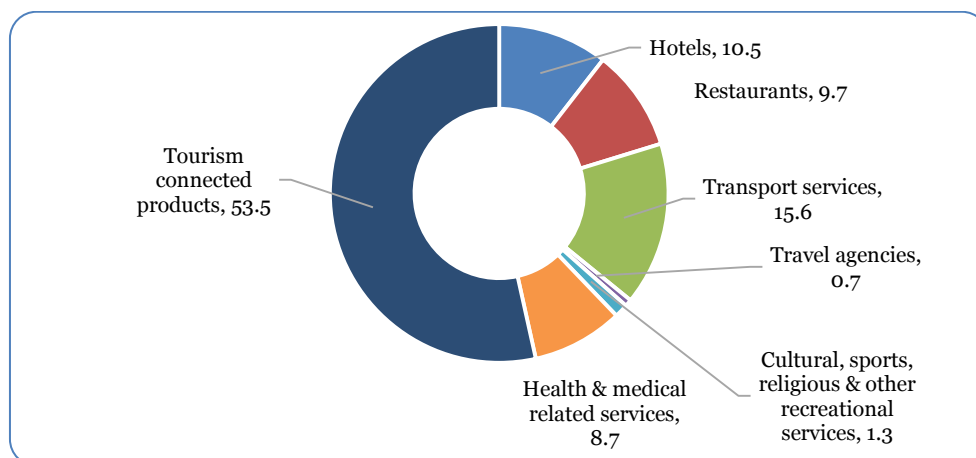
Source: NCAER computation using IPS 2015-16

**Figure IV.14: Average per-tourist expenditure (Rs.) incurred by outbound tourists in the state of reference**



Source: NCAER computation using IPS 2015-16

**Figure IV.15: Percent distribution of Outbound Tourism Expenditure by products and services**



Source: NCAER computation using IPS 2015-16

#### IV.6. Total Internal Tourism Consumption

TSA Table 4 presents the total internal tourism consumption which is the sum of total internal tourism expenditure and the imputed tourism consumption. The total internal tourism expenditure is the sum-total of total Inbound, Domestic and Outbound pre-trip tourism expenditure, presented in TSA Tables 1, 2a, 2b and 3. Hence, it refers to the expenditure incurred by all tourists within the state of reference. In addition, the components of imputed consumption are given in separate rows, to make up the total internal tourism consumption.<sup>3</sup> Since these components are not directly available from any data source, they are derived using certain plausible assumptions.

The components of imputed consumption, as recommended in TSA: RMF 2008, along with their methods of computation, are described below:

- The imputed consumption on services associated with vacation homes on own account. This is assumed to be equal to 1 per cent of the urban owner occupied dwelling services.<sup>4</sup>
- Imputed consumption towards tourism social transfers in kind (except refunds) is derived from the component of “social transfer in kind” against “Recreation and Culture” in the Classification of Individual Consumption Expenditure of Households (COICOP). Household consumption on any item of consumption comprises the individual consumption expenditure and social transfers in kind (paid by the government). Since the data on the shares of these transfers that goes to the tourists and to non-tourists are not available, it is

<sup>3</sup> The TSA: RMF 2008 recommends that imputed consumption may be shown against a separate column, but since most of these items fall under non-tourism products, these are shown against supplementary rows under domestic tourism.

<sup>4</sup> The economic activities covered under owner-occupied dwelling services include ownership of dwellings (occupied residential houses) and the imputed value of owner-occupied dwellings.

assumed to be 50 per cent for each.

- The FISIM value on purchases related to tourism trips is obtained using the share of FISIM in PFCE (as in NAS) and applying it to the total internal tourism consumption expenditure.

- The imputed consumption of services rendered by vacation residences provided by producers for the benefit of their employees refers to the cost borne by the companies (mostly private corporates) on the services that they provide in their guest houses for the benefit of employees. This is assumed to be about half per cent of the total output of the organised private corporate sector.

- While the accommodation cost is recommended to be excluded from tourism consumption when the tourists stay at their friends'/relatives' places while on a trip, the expense incurred on food is taken as one of the components of imputed tourism consumption. This is obtained by multiplying the average per day expenditure of food (obtained from PFCE, NAS) with the number of days spent at the friends'/relatives' places during all the tourist trips undertaken in a reference year.

The sum of the total internal tourism expenditure and the imputed tourism consumption gives the total tourism consumption, which is presented in TSA Table 4.

The percentage distribution of total internal tourism consumption by forms of tourism is presented in the table below:

**Table IV.4: Total Internal Tourism Consumption by forms of tourism (% distribution)**

Item	Inbound from other countries	Inbound from other states	Domestic	Outbound	Total
1. Accommodation services/Hotels	13.3	9.3	52.6	24.7	100.0
2 Food and beverage serving services/Restaurants	11.5	14.3	58.6	15.6	100.0
3 Railway passenger transport services	0.1	31.1	66.4	2.4	100.0
4 Road passenger transport services	2.8	18.3	72.3	6.6	100.0
5 Water passenger transport services	5.0	75.4	11.2	8.3	100.0
6 Air passenger transport services	1.0	53.3	33.9	11.7	100.0
7 Transport equipment rental services	2.2	10.2	81.1	6.5	100.0
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	15.8	9.3	61.3	13.7	100.0
9 Cultural and religious services	35.3	7.6	9.8	47.3	100.0
10 Sports and other recreational services	60.2	1.1	1.1	37.6	100.0
11 Health and medical related services	8.0	4.5	80.0	7.4	100.0
12 Readymade garments	9.0	7.1	42.9	41.1	100.0
13 Processed Food	3.4	7.9	72.0	16.8	100.0
14 Alcohol & Tobacco products	15.9	8.0	43.0	33.1	100.0
15 Travel related consumer goods	15.3	5.6	17.0	62.1	100.0
16 Footwear	12.0	5.5	30.9	51.5	100.0
17 Soaps, cosmetics and glycerin	3.5	13.1	75.8	7.5	100.0
18 Gems and jewellery	13.7	2.8	22.4	61.1	100.0
19 Books, journals, magazines, stationery etc.	11.1	6.2	20.2	62.5	100.0
Total Expenditure	7.3	14.5	60.7	17.6	100.0
<b>A.3 Other imputed connected products</b>	0.0	0.0	100.0	0.0	100.0
Total (Rs. Crore)	6.3	12.5	66.0	15.2	100.0

Source: NCAER computation using TSA Table 4

#### IV.7. Production Account of Tourism Industries

The production accounts of tourism industries and other industries in the economy of reference is presented in TSA Table 5. It conforms to the format established in the Systems of National Accounts (SNA) for production accounts.

The gross value added of all the tourism characteristic and tourism connected industries put

together is referred to as Gross Value Added of Tourism Industries (GVATI). The GVATI, however, has a limited role as being a relevant indicator of tourism's contribution to the economy. This is because not all the gross value added of these industries are on account of tourism activity; part of it is on account of non-tourism too.

As recommended, the production account for the state TSAs has been prepared using India's Supply and Use Table (SUT) for the year 2015-16. The latest official SUT for India, as prepared by the Central Statistics Office (CSO), is available for 2012-13. This has been updated for 2015-16 for the preparation of India's third TSA. The updated SUT is then used to compile the state-level SUTs. For this, the latest data available from official sources on the Value of Output and Gross Value Added, at the most disaggregated level, have been used. These data form the control totals of all the rows and columns of both Supply Table and Use Table. The inter-industry transactions are derived using the national-level ratios.

The detailed SUT with 142 products and 80 industries is aggregated to 24 industries and products, 19 industries were the tourism specific industries, for which the information on tourism consumption is available and presented in TSA Table 4; and the remaining 5 industries and products are the tourism non-specific industries and products, which, however, would have linkages with tourism industries/products.

The source of data for Tables 5 and 6 is the detailed data on state domestic product, that has been provided by the CSO and the respective state Directorates of Economics and Statistics. The all-India ratios have been used for deriving output, intermediate consumption or for splitting of industries and products at state level, wherever there is lack of information by states.

The 24X24 SUT for the state of reference, is presented as TSA Table 5 in Chapter V.



The following table summarises the production account of 24 industries. The GVATI works out to be Rs 5327359lakh, which is 10.5 percent of total GVA of the state economy.

**TABLE IV.5: ECONOMIC AGGREGATES OF INDUSTRIES**

	Industry	Gross Value of Output (Rs. lakh)	GVA (Rs. lakh)	Share in Total GVA (%)
1	Agriculture and allied	7587402	6399310	12.6
2	Mining, other manufacturing, construction, electricity, gas and water supply	14447887	4019381	7.9
3	Trade	11636975	8596279	16.9
4	Transport freight services	4197176	1902089	3.7
5	All non-tourism specific services	45035546	24624521	48.4
6	Accommodation services/Hotels	324128	110603	0.2
7	Food and beverage serving services/Restaurants	2049751	699440	1.4
8	Railway passenger transport services	51110	33867	0.1
9	Passenger transport services	2424937	1076643	2.1
10	Water passenger transport services	67786	20063	0.0
11	Air passenger transport services	485554	111647	0.2
12	Transport equipment rental services	4315	2948	0.0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	17073	8119	0.0
14	Cultural and religious services	8629	5674	0.0
15	Sports and other recreational services	188538	106995	0.2
16	Health and medical related services	2904429	1797228	3.5
17	Readymade garments	223139	73322	0.1
18	Processed Food	3494027	514362	1.0
19	Alcohol & Tobacco products	1481517	626655	1.2
20	Travel related consumer goods	285240	76944	0.2
21	Footwear	513	150	0.0
22	Soaps, cosmetics and glycerin	85750	18657	0.0
23	Gems and jewellery	36651	3562	0.0
24	Books, journals, magazines, stationery etc.	181286	40478	0.1
	<b>Total – all industries</b>	<b>97219361</b>	<b>50868939</b>	<b>100</b>
	Total Tourism specific industries (Tourism characteristic and Tourism connected)	14314374	5327359	10.5

Source: NCAER computation using TSA Table 5

#### **IV.8. Tourism Industry Ratios and TDGVA**

The most crucial table in a TSA is TSA Table 6, which is the core of the TSA system as it is where the confrontation and reconciliation between domestic supply and internal tourism consumption take place. In this table, the total supply of goods and services in the economy of reference by products, which includes domestic production (production by resident industries) and imports, (including valuation adjustments), is compared to internal tourism consumption that is derived in TSA Table 4.

Using the results of TSA Table 6, estimates can be derived regarding the gross value added attributable to tourism for each of the domestic industries that serve visitors. This provides the basic information that is necessary for the computation of tourism ratios for products and industries, TDGVA (Tourism Direct Gross Value Added) and TDGDP (Tourism Direct Gross Domestic Product) and their components. The table together with the associated Use Table provides a basis to compile input-output tables and input-output models that facilitate estimation of indirect contribution of tourism to the economy.

On comparing the demand side and supply side data, the Tourism Product Ratios (TPR) are derived for each of the 24 product categories. By definition, the Tourism Product Ratio is that proportion of the total supply of a product which is consumed by the tourists or is on account of tourism activity.

These TPRs, when applied to each industry column of the supply table, yield the Tourism Industry Ratios (TIRs) for each of the 24 industry categories. Using these ratios, the estimates can be derived regarding the GVA attributable to tourism for each of the domestic industries that serve visitors.

At state level, the Supply Table presents only domestic supply as state-level trade data are not available. It was for this reason that the regional TSAs, prepared for 2009-10, did not derive the

Tourism product and industry ratios by bringing together the Total supply and Tourism Demand data. The Tourism industry ratios, instead, were calculated using the small area estimation techniques.

However, for the present TSAs for 2015-16, an effort is made to use the standard methodology for deriving the Tourism product and industry ratios by using the similar SUT framework as used for national TSA.

For this, the total supply (inclusive of imports) is derived by applying the share of State Domestic supply in India's Domestic Supply to India's Total Supply. This is based on the assumption that the share of a state in India's Total Supply is same as its share in India's domestic supply.

In the case of Use Table, Final demand is kept as a single aggregate column vector.

By doing this, tourism product ratios for all products are derived by comparing Total Supply of each product with Total Tourism Consumption of that product. In the case of products, for which these ratios did not look plausible enough, these have been replaced with the national ratio for that product. The Tourism consumption for that product is accordingly adjusted and referred as Adjusted Tourism Consumption.

These TPRs are applied on each industry column to derive the Tourism Industry Ratios. These ratios bring out the tourism component from each industry's GVA, hence bringing out the Total Tourism Direct GVA (TDGVA). The share of TDGVA to total state GVA is the contribution of Tourism to state's economy.

It may be noted that because of the difference in methodology in deriving the Tourism Industry Ratios and TDGVA in state TSAs of 2009-10 and 2015-16, the shares of Tourism to state economy may not be strictly comparable. However, the state TSAs of 2015-16 clearly are an improvement over the same of 2009-10 as the methodology converges to that of national methodology and hence to the

internationally recommended methodology.

The production account of industries along with their respective tourism components are presented in TSA Table 6 for each product and services of consumption. The following table summarises the same and presents the share of TDGVA in state total GVA.

**Table IV.6: Total Supply, Tourism Consumption and TDGVA**

		<b>Total Supply (Rs. Lakh)</b>	<b>Adjusted Tourism Consumption (Rs. Lakh)</b>	<b>Tourism Product Ratio (%)</b>	<b>Tourism Industry Ratio (%)</b>	<b>GVA (Rs. Lakh)</b>	<b>TDGVA (Rs. Lakh)</b>
<b>1</b>	Agriculture and allied	11271458	0	0.0	0.00	6399310	0
<b>2</b>	Mining, other manufacturing, construction, electricity, gas and water supply	53325148	0	0.0	0.00	4019381	100
<b>3</b>	Trade	0	0	0.0	0.06	8596279	5128
<b>4</b>	Transport freight services	0	0	0.0	1.90	1902089	36107
<b>5</b>	All non-tourism specific services	27759085	1387954	5.0	2.63	24624521	648674
<b>6</b>	Accommodation services/Hotels	471118	339205	72.0	71.36	110603	78927
<b>7</b>	Food and beverage serving services/Restaurants	2208064	1175939	53.3	54.21	699440	379173
<b>8</b>	Railway passenger transport services	57509	40144	69.8	69.80	33867	23641
<b>9</b>	Road passenger transport services	2545700	899193	35.3	29.57	1076643	318371
<b>10</b>	Water passenger transport services	95323	6157	6.5	6.46	20063	1296
<b>11</b>	Air passenger transport services	551241	289227	52.5	52.47	111647	58579
<b>12</b>	Transport equipment rental services	4873	1852	38.0	38.00	2948	1120
<b>13</b>	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	23540	12065	51.3	51.25	8119	4161
<b>14</b>	Cultural and religious services	9658	7152	74.1	74.05	5674	4202
<b>15</b>	Sports and other recreational services	284948	16286	5.7	5.72	106995	6115
<b>16</b>	Health and medical related services	3256195	1164348	35.8	35.76	1797228	642652
<b>17</b>	Readymade garments	426622	151443	35.5	0.00	73322	0
<b>18</b>	Processed Food	8406517	111812	1.3	0.00	514362	3
<b>19</b>	Alcohol & Tobacco products	2740731	22634	0.8	0.01	626655	73
<b>20</b>	Travel related consumer goods	233255	33034	14.2	0.01	76944	7
<b>21</b>	Footwear	239874	49396	20.6	0.00	150	0
<b>22</b>	Soaps, cosmetics and glycerin	274908	7889	2.9	0.00	18657	1
<b>23</b>	Gems and jewellery	282958	126360	44.7	0.07	3562	3
<b>24</b>	Books, journals, magazines, stationery etc.	541943	24003	4.4	0.00	40478	1
	<b>Total</b>	<b>115010670</b>	<b>5866092</b>	<b>5.1</b>	<b>4.34</b>	<b>50868939</b>	<b>2208333</b>

Source: NCAER computation using TSA Table 6

### Key Findings:

- The value of Total supply of all industries in the state is Rs. 115010670 lakh, of which Rs. 5866092 lakh is on account of tourism. This is 5.1 percent of total supply.
- The TPR and TIR are the largest for the cultural and religious services, at 74.1 and 74.1 percent respectively.
- The TDGVA of the state stands at Rs. 2208333 lakh, which is 4.3 percent of Total GVA.
- Hence, the direct share of tourism in state GVA is 4.3 percent.

### IV.9. Tourism Employment

TSA Table 7 presents the employment situation in tourism industries in the state of reference. According to TSA: RMF 2008, *“seasonality, high variability in the working conditions, flexibility, and the informality of jobs in several small units are the major challenges in collecting data on employment in tourism industries”*.

Further, labour is a factor of production and is generally associated with an establishment wherein various products are produced. Therefore, relating employment to a specific product or group of products of a given establishment is a complex issue in measuring tourism direct employment.

For this reason, tourism employment, referring to the employment strictly related to the goods and services (tourism characteristic, tourism connected, and other) acquired by visitors and produced by either tourism industries or other industries cannot be assessed directly.

Hence, it is recommended to restrict to employment in tourism characteristic industries as the direct tourism employment.

For TSAs for India and the states of India, the TSA Table 7 presents the total number of jobs (one employed person can take up more than one job, with the second being of a subsidiary nature). The table also distinguishes jobs in tourism industries by nature of employment, that is, the self-employed and employees.

The data on state-wise employment are sourced from the Annual Employment Unemployment Survey, conducted in 2015–16 by the Labour Bureau (LB).

But due to some limitations in this dataset, certain adjustments have been done using the NSSO conducted Employment-Unemployment survey for 2011-12.

The LB data presents the employment by industries at the three-digit level of NIC-2008 classification. Further, this data canvassed persons aged 15 years and above. Besides, the survey did not capture the data on multiple activities, that is, the number of persons employed in both principal and subsidiary status. Hence, the survey presents the headcount employment and does not estimate the number of jobs.

In order to comply with the methodology followed in the previous TSA, and for estimating the number of jobs, the number of persons employed by each three-digit industry code has been adjusted for age. For this purpose, the factors were taken from the NSS data on the Employment–Unemployment Survey conducted in 2011–12.

In the first stage of adjustment, an industry-wise factor was obtained by taking the ratio of the employed persons of all ages to the employed persons aged 15 years and above, using the NSS 2011–12 data. This industry-wise factor was applied on the respective industry-wise estimated employment obtained using the LB 2015–16 data.

In the second stage of adjustment, another industry-

wise factor was obtained by taking the ratio of the number of jobs to the number of workers, using the NSS 2011–12 data. This factor was applied on the industry-wise employment obtained after the first stage of adjustment.

The final estimates were also adjusted using the population projection for 2015–16, in order to adjust for under-estimation in population.

The estimates of number of jobs, hence obtained, were disaggregated to 4 or 5-digit level of classification, wherever required, so that the number of jobs in the 11 tourism characteristics industries could be estimate. This disaggregation was also done using the proportions obtained from NSS dataset.

The final table (TSA Table 7) presents the number of jobs, by work status, for all the 11 tourism characteristics industries. The sum-total of these jobs is referred to as tourism employment and its share in total state employment is the direct share of Tourism to state employment.

#### **IV.10. INDIRECT CONTRIBUTION OF TOURISM**

The indirect benefits of tourism result due to the inter-linkages of tourism specific industries with other industries of the economy. Besides, these result when the money spent by the tourists in an area is re-circulated and re-spent in the local economy, thereby generating extra income and output. The actual economic benefit to the area is, therefore, greater than the original amount spent by the tourists.

As suggested in the TSA: RMF 2008, the Input–Output (IO) model is used to quantify the indirect benefits. The model generates the output, GVA and employment multipliers, which are the measures of the indirect benefits of a sector to the economy's output, GVA/GDP, and employment, respectively.

The basic requirement of an IO model is the IO table, which is prepared using the Supply and Use Table (SUT). The SUT for the state is presented in TSA



Table 5. This SUT is converted to an IO table for deriving the required multipliers for the tourism sector. However, the SUT of 24 industries and products does not list tourism as a separate sector, which is embedded within the tourism characteristic and connected industries and products. Thus, in order to segregate the tourism component from these industries and products, the tourism industry ratios and tourism products ratios are applied on each industry column and product row, respectively.

The indirect benefits due to the interlinkages of the tourism industry with other industries are obtained in the Leontief Inverse matrix, simply called the “inverse” matrix, and subsequently through the multipliers. The multipliers represent a quantitative expression of the extent to which some initial, “exogenous” force or change is expected to generate additional effects through the interdependencies associated with some assumed and/or empirically established “endogenous” linkage system.

To be specific, if a sector increases its output, more inputs are required, including more intermediates from other sectors. Such an interconnection of a particular sector to another sectors is termed as a “backward linkage” and is represented by an “output multiplier”. This is the column sum of the inverse matrix. The higher the multipliers, the larger are the effects on the input–output system of the economy.

The employment multiplier is the ratio of the employment linkage coefficient to the employment direct coefficient. The direct coefficient is the employment to output ratio and the employment linkage coefficient is obtained by multiplying the row vector of the employment direct coefficient with the inverse matrix. It may be noted that employment refers to the number of jobs in an industry, so as to be in conformity with the TSA Table on Employment.

The tourism output multiplier, GVA multiplier and employment multiplier are presented in Table IV.7.

#### **IV.11. NON-MONETARY TOURISM INDICATORS**

TSA Tables 8 and 9 on Tourism Gross Fixed Capital Formation and Tourism Collective Consumption respectively are beyond the scope of regional TSAs due to non-availability of data.

TSA Table 10 presents a few quantitative indicators that are important for the interpretation of the monetary information presented. The indicators include the estimated number of tourist households and tourists, trips per 100 households, distribution of trips (for states of origin) by leading purposes; distribution of trips (for states of destination) by leading purposes, distribution of trips by main destination, distribution of trips by starting month of travel. It may be noted that the set of non-monetary indicators may vary from country to country depending on the availability of data.



## V. TSA TABLES

**TSA Table 1A: Inbound Tourism Expenditure incurred by International Tourists by Products and by types of tourists (Rs. Lakh)**

Item	NRI	PIO	OCI	Others	Total
<b>A.1 Tourism characteristic products</b>					
1. Accommodation services/Hotels	7334	9614	6	20694	37648
2 Food and beverage serving services/Restaurants	27312	713	6273	13489	47787
3 Railway passenger transport services	126	0	0	25	151
4 Road passenger transport services	17439	139	1604	5616	24798
5 Water passenger transport services	205	3	0	102	311
6 Air passenger transport services	1286	1247	0	354	2888
7 Transport equipment rental services	245	0	0	2079	2325
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	4975	0	0	107	5082
9 Cultural and religious services	2066	0	297	159	2522
10 Sports and other recreational services	1508	8	1755	5074	8344
11 Health and medical related services	30492	0	29891	1982	62364
<b>A.2 Tourism connected products</b>					
12 Readymade garments	26010	385	8845	6204	41445
13 Processed Food	1771	48	43	1907	3769
14 Alcohol & Tobacco products	2479	24	586	502	3590
15 Travel related consumer goods	1293	0	3703	44	5040
16 Footwear	3306	16	2320	288	5930
17 Soaps, cosmetics and glycerin	273	0	0	3	276
18 Gems and jewellery	13385	74	3	3850	17312
19 Books, journals, magazines, stationery etc.	1116	32	143	1375	2665
Total Expenditure	142623	12302	55468	63855	274247
Estimated Number of tourists 2015-16	330044	16256	17638	202733	566671
Per Tourist Expenditure (Rs.)	43213	0	0	31497	48396

Source: NCAER computation

**TSA Table 1B: Inbound Tourism Expenditure incurred by Tourists from other states by Products and by leading purposes (Rs. Lakh)**

Item	Business	Holiday, leisure and recreation	Social	Religious	Education and training	Health and medical	Shopping	Other	Total
<b>A.1. Tourism characteristic products</b>									
1. Accommodation services/Hotels	1237	19143	577	4628	60	353	33	324	26355
2 Food and beverage serving services/Restaurants	3768	26232	6990	15675	1597	2201	63	2669	59195
3 Railway passenger transport services	1810	15518	9423	6793	462	199	0	509	34714
4 Road passenger transport services	1509	63094	17046	72170	0	3189	92	7776	164875
5 Water passenger transport services	0	2093	398	0	79	1757	194	120	4640
6 Air passenger transport services	0	122121	9004	14094	0	4953	0	4081	154253
7 Transport equipment rental services	10	3928	1477	3762	603	947	10	147	10884
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	1932	479	0	13	70	2	492	2988
9 Cultural and religious services	0	184	36	316	4	0	0	0	540
10 Sports and other recreational services	0	139	9	9	0	0	1	0	158
11 Health and medical related services	413	233	1378	96	0	32324	1	514	34959
<b>A.2 Tourism connected products</b>								0	
12 Readymade garments	1432	10065	6326	13805	84	550	0	547	32809
13 Processed Food	263	1319	2176	3096	250	202	67	1431	8803
14 Alcohol & Tobacco products	45	466	392	6	0	23	207	673	1811
15 Travel related consumer goods	0	491	531	517	0	68	0	243	1850
16 Footwear	524	1365	310	262	2	93	77	89	2722
17 Soaps, cosmetics and glycerin	57	206	229	384	4	61	0	96	1037
18 Gems and jewellery	0	581	2855	114	0	33	1	0	3585
19 Books, journals, magazines, stationery etc.	0	621	171	578	4	35	78	2	1488
Total Expenditure	11070	269730	59807	136305	3160	47057	825	19714	547667
Estimated number of trips 2015-16	149754	314578	1411182	927709	156413	85302	2291	362938	3410166
Per-trip Expenditure (Rs.)	7392	85744	4238	14693	2020	55165	35997	5432	16060

Source: NCAER computation

**TSA Table 2: Domestic Tourism Expenditure incurred by Tourists from within the state of reference by Products and by leading purposes (RS. LAKH)**

Item	Business	Holiday, leisure and recreation	Social	Religious	Education and training	Health and medical	Shopping	Other	Total
<b>A.1. Tourism characteristic products</b>									
1. Accommodation services/Hotels	85493	3669	11797	7012	2375	27206	20	10871	148442
2 Food and beverage serving services/Restaurants	102338	5882	42951	14259	5244	55106	34	17413	243228
3 Railway passenger transport services	40049	757	25037	3120	2036	418	0	2703	74120
4 Road passenger transport services	131251	15274	370395	55911	4987	21757	73	50288	649937
5 Water passenger transport services	0	348	319	5	0	20	0	0	692
6 Air passenger transport services	98149	0	0	0	0	0	0	0	98149
7 Transport equipment rental services	25088	1602	25824	11739	1012	17282	3	3964	86515
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	12073	560	3136	529	0	1603	1	1855	19757
9 Cultural and religious services	13	35	191	464	1	0	0	0	704
10 Sports and other recreational services	0	39	100	0	6	1	0	0	146
11 Health and medical related services	198	1053	14816	267	118	581215	0	23482	621149
<b>A.2 Tourism connected products</b>								0	
12 Readymade garments	5639	1911	125102	12512	1476	8440	636	42630	198346
13 Processed Food	10915	778	54532	5157	305	3482	2	5329	80501
14 Alcohol & Tobacco products	847	205	2737	269	0	189	1	5492	9739
15 Travel related consumer goods	17	1528	1107	626	281	1138	0	921	5618
16 Footwear	1894	317	7082	306	123	1134	17	4415	15287
17 Soaps, cosmetics and glycerin	613	54	1367	318	103	1743	0	1784	5983
18 Gems and jewellery	274	122	23993	844	3	55	2568	427	28287
19 Books, journals, magazines, stationery etc.	209	75	3970	70	47	197	0	291	4858
Total Expenditure	515059	34209	714455	113408	18116	720987	3357	171866	2291457
Estimated number of trips 2015-16 ('000)	901	316	37692	3088	729	2978	3	2446	48152
Per-trip Expenditure (Rs.)	57150	10838	1896	3673	2484	24210	126283	7027	4759

Source: NCAER computation

**TSA Table 3: Pre-Trip Outbound Tourism Expenditure incurred by resident visitors travelling abroad by products and by leading purposes (Rs. Lakh)**

Item	Business	Holiday	Social	Religious	Education/ training	Medical	Others	Total
<b>A.1. Tourism characteristic products</b>								
1. Accommodation services/Hotels	21163	14958	18033	275	12444	2069	816	69757
2 Food and beverage serving services/Restaurants	13857	20219	17804	918	9460	1470	959	64686
3 Railway passenger transport services	809	435	585	0	507	0	368	2703
4 Road passenger transport services	5853	14591	21369	5166	10334	128	2142	59583
5 Water passenger transport services	96	71	198	0	51	1	97	513
6 Air passenger transport services	4913	22967	456	0	2504	0	3097	33938
7 Transport equipment rental services	415	979	71	15	5316	0	107	6903
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	3651	13	162	43	387	3	165	4425
9 Cultural and religious services	206	317	2635	154	25	0	48	3386
10 Sports and other recreational services	303	955	2947	211	764	0	22	5201
11 Health and medical related services	1346	2843	16377	6535	1538	28611	509	57760
<b>A.2 Tourism connected products</b>								
12 Readymade garments	9425	17023	83586	20941	49784	962	8227	189948
13 Processed Food	518	3372	11654	414	1412	49	1320	18738
14 Alcohol & Tobacco products	304	1573	3732	23	1736	52	73	7493
15 Travel related consumer goods	1032	2639	6547	5571	2978	603	1156	20526
16 Footwear	1487	3546	7025	1214	10266	185	1736	25458
17 Soaps, cosmetics and glycerin	111	85	287	39	31	0	40	592
18 Gems and jewellery	4028	31182	38763	596	2535	72	0	77177
19 Books, journals, magazines, stationery etc.	478	1915	2002	216	10210	152	17	14992
Total Expenditure ('000 Rs.)	70	140	234	42	122	34	21	664
Estimated Number of tourists - 2015-16 ('000)	507	844	1201	476	611	49	227	3915
Per-tourist Expenditure (Rs.)	13802	16549	19502	8894	20020	70418	9203	16955

Source: NCAER computation

**TSA Table 4: Total Internal Tourism Consumption (Rs. Lakh)**

Item	Inbound from other countries	Inbound from other states	Domestic	Outbound	Total
<b>A.1. Tourism characteristic products</b>					
1. Accommodation services/Hotels	37648	26355	148442	69757	282203
2 Food and beverage serving services/Restaurants	47787	59195	243228	64686	414897
3 Railway passenger transport services	151	34714	74120	2703	111688
4 Road passenger transport services	24798	164875	649937	59583	899193
5 Water passenger transport services	311	4640	692	513	6157
6 Air passenger transport services	2888	154253	98149	33938	289227
7 Transport equipment rental services	2325	10884	86515	6903	106626
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	5082	2988	19757	4425	32252
9 Cultural and religious services	2522	540	704	3386	7152
10 Sports and other recreational services	8344	158	146	5201	13850
11 Health and medical related services	62364	34959	621149	57760	776232
<b>A.2 Tourism connected products</b>					
12 Readymade garments	41445	32809	198346	189948	462547
13 Processed Food	3769	8803	80501	18738	111812
14 Alcohol & Tobacco products	3590	1811	9739	7493	22634
15 Travel related consumer goods	5040	1850	5618	20526	33034
16 Footwear	5930	2722	15287	25458	49396
17 Soaps, cosmetics and glycerin	276	1037	5983	592	7889
18 Gems and jewellery	17312	3585	28287	77177	126360
19 Books, journals, magazines, stationery etc.	2665	1488	4858	14992	24003
Total Expenditure	274247	547667	2291457	663779	3777151
<b>A.3 Other imputed connected products</b>	0	0	592627	0	592627
21 Vacation homes (assumed to be 1% of urban owner occupied dwelling services, total Rs. 1,69,363 crore)	0	0	24147	0	24147
22 Social transfers in kind (50% of GFCE of tourism and cultural services)	0	0	10475	0	10475
23 FISIM (calculated from the share of fisim in PFCE)	0	0	199400	0	199400
24 Producers' guest houses (.5% of private corporate sector output)	0	0	246306	0	246306
25 Imputed expenditures of households on food for tourists staying with them	0	0	112299	0	112299
Total (Rs. Crore)	274247	547667	2884085	663779	4369778

Source: NCAER computation



**TSA Table 5: Production Account of Tourism Industries - Supply Table - Kerala 2015-16  
(Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				
		1	2	3	4	5
1	Agriculture and allied	7494436	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	92966	13535009	0	0	21308477
3	Trade	0	280553	11518557	0	0
4	Transport freight services	0	0	0	3971609	0
5	All non-tourism specific services	0	7174	118419	0	23727069
6	Accommodation services/Hotels	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0
9	Road passenger transport services	0	0	0	225566	0
10	Water passenger transport services	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0
17	Readymade garments	0	39835	0	0	0
18	Processed Food	0	14224	0	0	0
19	Alcohol & Tobacco products	0	554	0	0	0
20	Travel related consumer goods	0	39879	0	0	0
21	Footwear	0	2998	0	0	0
22	Soaps, cosmetics and glycerin	0	78246	0	0	0
23	Gems and jewellery	0	134629	0	0	0
24	Books, journals, magazines, stationery etc.	0	314786	0	0	0
	Total Value of Output (Rs. Lakh)	7587402	14447887	11636975	4197176	45035546

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Supply Table - Kerala 2015-16 (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				
		6	7	8	9	10
1	Agriculture and allied	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	0	0	0
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	394839	0
5	All non-tourism specific services	0	0	0	0	0
6	Accommodation services/Hotels	313077	104359	0	0	0
7	Food and beverage serving services/Restaurants	11051	1945392	0	0	0
8	Railway passenger transport services	0	0	51110	0	0
9	Road passenger transport services	0	0	0	2030098	0
10	Water passenger transport services	0	0	0	0	67786
11	Air passenger transport services	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0
17	Readymade garments	0	0	0	0	0
18	Processed Food	0	0	0	0	0
19	Alcohol & Tobacco products	0	0	0	0	0
20	Travel related consumer goods	0	0	0	0	0
21	Footwear	0	0	0	0	0
22	Soaps, cosmetics and glycerin	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	324128	2049751	51110	2424937	67786

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Supply Table - Kerala 2015-16 (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				
		11	12	13	14	15
1	Agriculture and allied	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	0	0	0
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	0	0	0	0	0
6	Accommodation services/Hotels	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0
11	Air passenger transport services	485554	0	0	0	0
12	Transport equipment rental services	0	4315	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	17073	0	0
14	Cultural and religious services	0	0	0	8629	0
15	Sports and other recreational services	0	0	0	0	188538
16	Health and medical related services	0	0	0	0	0
17	Readymade garments	0	0	0	0	0
18	Processed Food	0	0	0	0	0
19	Alcohol & Tobacco products	0	0	0	0	0
20	Travel related consumer goods	0	0	0	0	0
21	Footwear	0	0	0	0	0
22	Soaps, cosmetics and glycerin	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	485554	4315	17073	8629	188538

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Supply Table - Kerala 2015-16 (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				
		16	17	18	19	20
1	Agriculture and allied	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	32877	21352	23582	38774
3	Trade	0	2451	68458	30066	4856
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	0	11	427	3447	517
6	Accommodation services/Hotels	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0
16	Health and medical related services	2904429	0	0	0	0
17	Readymade garments	0	185424	0	0	0
18	Processed Food	0	0	3383434	22019	0
19	Alcohol & Tobacco products	0	0	9415	1402385	0
20	Travel related consumer goods	0	2376	435	0	79463
21	Footwear	0	0	0	0	133883
22	Soaps, cosmetics and glycerin	0	0	10505	18	0
23	Gems and jewellery	0	0	0	0	27746
24	Books, journals, magazines, stationery etc.	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	2904429	223139	3494027	1481517	285240

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Supply Table - Kerala 2015-16 (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				Total Domestic Supply at BP
		21	22	23	24	
1	Agriculture and allied	0	0	0	0	7494436
2	Mining, other manufacturing, construction, electricity, gas and water supply	64	73252	4684	171558	35302594
3	Trade	9	1604	377	1423	11908354
4	Transport freight services	0	0	0	0	4366448
5	All non-tourism specific services	0	55	546	70	23857734
6	Accommodation services/Hotels	0	0	0	0	417435
7	Food and beverage serving services/Restaurants	0	0	0	0	1956444
8	Railway passenger transport services	0	0	0	0	51110
9	Road passenger transport services	0	0	0	0	2255664
10	Water passenger transport services	0	0	0	0	67786
11	Air passenger transport services	0	0	0	0	485554
12	Transport equipment rental services	0	0	0	0	4315
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	17073
14	Cultural and religious services	0	0	0	0	8629
15	Sports and other recreational services	0	0	0	0	188538
16	Health and medical related services	0	0	0	0	2904429
17	Readymade garments	0	0	0	0	225259
18	Processed Food	0	1726	0	0	3421402
19	Alcohol & Tobacco products	0	67	0	0	1412422
20	Travel related consumer goods	164	71	268	231	122888
21	Footwear	277	0	0	0	137158
22	Soaps, cosmetics and glycerin	0	8975	0	0	97745
23	Gems and jewellery	0	0	30776	0	193152
24	Books, journals, magazines, stationery etc.	0	0	0	8004	322790
	Total Value of Output (Rs. Lakh)	513	85750	36651	181286	97219361

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Supply Table – Kerala, 2015-16 (Rs. Lakh) (Cont.)**

S. No.	Industry	Product taxes less Subsidies	Output at Producer price (OP)	Trade and Transport Margins (TTM)	Output at Purchaser's price (OP + TTM)
1	Agriculture and allied	-667624	6826812	3219044	10045856
2	Mining, other manufacturing, construction, electricity, gas and water supply	4201152	39503746	8023091	47526837
3	Trade	9060	11917414	-11917414	0
4	Transport freight services	61984	4428433	-4428433	0
5	All non-tourism specific services	882966	24740701	0	24740701
6	Accommodation services/Hotels	2456	419891	0	419891
7	Food and beverage serving services/Restaurants	11526	1967970	0	1967970
8	Railway passenger transport services	146	51256	0	51256
9	Road passenger transport services	13229	2268893	0	2268893
10	Water passenger transport services	17173	84958	0	84958
11	Air passenger transport services	5749	491302	0	491302
12	Transport equipment rental services	29	4344	0	4344
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	3907	20980	0	20980
14	Cultural and religious services	-21	8608	0	8608
15	Sports and other recreational services	65426	253965	0	253965
16	Health and medical related services	-2296	2902132	0	2902132
17	Readymade garments	50474	275733	104501	380233
18	Processed Food	181634	3603037	3889398	7492435
19	Alcohol & Tobacco products	314172	1726594	716124	2442718
20	Travel related consumer goods	18061	140949	66943	207892
21	Footwear	11708	148866	64925	213791
22	Soaps, cosmetics and glycerin	69347	167092	77924	245015
23	Gems and jewellery	33732	226884	25307	252190
24	Books, journals, magazines, stationery etc.	1634	324424	158591	483015
	Total Value of Output (Rs. Lakh)	5285623	102504984	0	102504984

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Use Table – Kerala, 2015-16  
(Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				
		1	2	3	4	5
1	Agriculture and allied	509412	1063710	0	63185	890168
2	Mining, other manufacturing, construction, electricity, gas and water supply	375406	8950169	1795127	1478527	13567356
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	110436	214635	726901	655064	4773739
6	Accommodation services/Hotels	1178	244	38543	8152	69861
7	Food and beverage serving services/Restaurants	4697	1144	180910	38262	327909
8	Railway passenger transport services	0	2649	2729	129	14356
9	Road passenger transport services	72192	32136	190906	1237	165114
10	Water passenger transport services	0	0	4805	37	23237
11	Air passenger transport services	0	16530	24837	1675	158982
12	Transport equipment rental services	12	1941	807	392	6533
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	39351	4256	30469
14	Cultural and religious services	0	0	1	3	48
15	Sports and other recreational services	1885	968	4397	1220	11592
16	Health and medical related services	3	0	0	0	1740
17	Readymade garments	3448	3041	10784	23474	62792
18	Processed Food	96892	6381	816	0	212417
19	Alcohol & Tobacco products	0	858	0	0	7828
20	Travel related consumer goods	2227	8234	5875	3191	41293
21	Footwear	0	0	0	0	474
22	Soaps, cosmetics and glycerin	0	4329	7653	0	768
23	Gems and jewellery	0	100591	0	0	0
24	Books, journals, magazines, stationery etc.	10304	20944	6256	16284	44348
	Total IIUSE at PP	1188092	10428506	3040696	2295087	20411025
	Output at BP	7587402	14447887	11636975	4197176	45035546
	GVA	6399310	4019381	8596279	1902089	24624521

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Use Table – Kerala, 2015-16 (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				
		6	7	8	9	10
1	Agriculture and allied	104901	663380	0	40544	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	19841	125470	12727	869564	35134
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	9807	62021	2814	389277	8159
6	Accommodation services/Hotels	32	200	66	4745	155
7	Food and beverage serving services/Restaurants	149	939	309	22271	726
8	Railway passenger transport services	3	19	0	30	1
9	Road passenger transport services	118	748	0	10	0
10	Water passenger transport services	1	5	0	6	0
11	Air passenger transport services	30	187	3	292	14
12	Transport equipment rental services	1	8	0	250	1
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	130	821	0	1215	59
14	Cultural and religious services	0	2	0	1	0
15	Sports and other recreational services	550	3481	99	284	599
16	Health and medical related services	0	0	0	0	0
17	Readymade garments	250	1584	537	11168	1418
18	Processed Food	68952	436046	0	0	0
19	Alcohol & Tobacco products	6458	40840	0	0	0
20	Travel related consumer goods	28	180	55	1687	121
21	Footwear	0	0	0	0	0
22	Soaps, cosmetics and glycerin	2260	14293	0	0	0
23	Gems and jewellery	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	14	86	632	6947	1335
	Total IIUSE at PP	213525	1350311	17243	1348294	47722
	Output at BP	324128	2049751	51110	2424937	67786
	GVA	110603	699440	33867	1076643	20063

Source: NCAER computation



**TSA Table 5: Production Account of Tourism Industries - Use Table – Kerala, 2015-16 (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				
		11	12	13	14	15
1	Agriculture and allied	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	241696	770	4865	2457	15131
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	92812	419	2913	266	59573
6	Accommodation services/Hotels	1469	2	36	8	95
7	Food and beverage serving services/Restaurants	6893	10	168	39	444
8	Railway passenger transport services	39	0	8	9	239
9	Road passenger transport services	11	40	131	21	2001
10	Water passenger transport services	7	0	3	2	53
11	Air passenger transport services	380	0	126	17	334
12	Transport equipment rental services	19	1	0	1	47
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	44	253	20	421
14	Cultural and religious services	2	0	0	0	9
15	Sports and other recreational services	1057	23	25	8	2018
16	Health and medical related services	0	0	0	0	25
17	Readymade garments	15452	23	242	60	507
18	Processed Food	0	0	0	0	0
19	Alcohol & Tobacco products	0	0	0	0	0
20	Travel related consumer goods	1299	11	21	32	146
21	Footwear	0	0	0	0	0
22	Soaps, cosmetics and glycerin	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	12771	23	165	14	502
	Total IIUSE at PP	373907	1367	8954	2955	81543
	Output at BP	485554	4315	17073	8629	188538
	GVA	111647	2948	8119	5674	106995

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Use Table – Kerala, 2015-16 (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column				
		16	17	18	19	20
1	Agriculture and allied	0	0	2801388	584252	153738
2	Mining, other manufacturing, construction, electricity, gas and water supply	977879	132799	52432	95467	23214
3	Trade	0	0	0	0	0
4	Transport freight services	0	0	0	0	0
5	All non-tourism specific services	102491	4135	9489	13801	1147
6	Accommodation services/Hotels	287	0	0	0	0
7	Food and beverage serving services/Restaurants	1345	0	0	0	0
8	Railway passenger transport services	0	98	244	1192	53
9	Road passenger transport services	338	577	1328	3843	241
10	Water passenger transport services	204	0	0	0	0
11	Air passenger transport services	7476	0	0	0	0
12	Transport equipment rental services	0	30	48	8	26
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	22	0	0	0	0
14	Cultural and religious services	0	0	0	0	0
15	Sports and other recreational services	1537	0	0	0	0
16	Health and medical related services	9461	0	0	0	0
17	Readymade garments	4484	1728	0	0	108
18	Processed Food	0	0	113811	33880	0
19	Alcohol & Tobacco products	0	0	879	122305	0
20	Travel related consumer goods	90	10175	32	17	6916
21	Footwear	0	0	0	0	327
22	Soaps, cosmetics and glycerin	0	45	0	0	0
23	Gems and jewellery	0	3	0	0	22518
24	Books, journals, magazines, stationery etc.	1586	227	13	96	8
	Total IIUSE at PP	1107201	149818	2979664	854862	208296
	Output at BP	2904429	223139	3494027	1481517	285240
	GVA	1797228	73322	514362	626655	76944

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Use Table – Kerala, 2015-16  
(Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column			
		21	22	23	24
1	Agriculture and allied	317	2059	1	18296
2	Mining, other manufacturing, construction, electricity, gas and water supply	28	63200	7988	117917
3	Trade	0	0	0	0
4	Transport freight services	0	0	0	0
5	All non-tourism specific services	2	851	82	3569
6	Accommodation services/Hotels	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0
8	Railway passenger transport services	0	10	0	66
9	Road passenger transport services	0	47	1	249
10	Water passenger transport services	0	0	0	0
11	Air passenger transport services	0	0	0	0
12	Transport equipment rental services	0	4	0	21
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0
14	Cultural and religious services	0	0	0	0
15	Sports and other recreational services	0	1	0	0
16	Health and medical related services	0	0	0	0
17	Readymade garments	0	0	0	4
18	Processed Food	0	390	0	0
	Alcohol & Tobacco products	0	42	0	0
20	Travel related consumer goods	14	5	40	51
21	Footwear	1	0	0	0
22	Soaps, cosmetics and glycerin	0	474	0	0
23	Gems and jewellery	0	0	24977	0
24	Books, journals, magazines, stationery etc.	0	10	0	636
	Total IIUSE at PP	363	67093	33090	140808
	Output at BP	513	85750	36651	181286
	GVA	150	18657	3562	40478

Source: NCAER computation

**TSA Table 5: Production Account of Tourism Industries - Use Table – Kerala, 2015-16  
(Rs. Lakh) (Cont.)**

S. No.	Industry	IIUSE	TFUSE	Total Use
1	Agriculture and allied	6895350	3150505	10045856
2	Mining, other manufacturing, construction, electricity, gas and water supply	28965166	18561672	47526837
3	Trade	0	0	0
4	Transport freight services	0	0	0
5	All non-tourism specific services	7244406	17496295	24740701
6	Accommodation services/Hotels	125070	294821	419891
7	Food and beverage serving services/Restaurants	586217	1381754	1967970
8	Railway passenger transport services	21876	29379	51256
9	Road passenger transport services	471290	1797603	2268893
10	Water passenger transport services	28361	56597	84958
11	Air passenger transport services	210881	280421	491302
12	Transport equipment rental services	10151	-5808	4344
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	77061	-56081	20980
14	Cultural and religious services	66	8542	8608
15	Sports and other recreational services	29744	224221	253965
16	Health and medical related services	11229	2890903	2902132
17	Readymade garments	141104	239130	380233
18	Processed Food	969586	6522849	7492435
19	Alcohol & Tobacco products	179211	2263507	2442718
20	Travel related consumer goods	81741	126152	207892
21	Footwear	802	212989	213791
22	Soaps, cosmetics and glycerin	29821	215194	245015
23	Gems and jewellery	148089	104101	252190
24	Books, journals, magazines, stationery etc.	123200	359815	483015
	Total IIUSE at PP	46350422	56154562	102504984
	Output at BP	97219361		
	GVA	50868939		

Source: NCAER computation

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column					
		1	TS*	2	TS*	3	TS*
1	Agriculture and allied	7494436	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	92966	0	13535009	0	0	0
3	Trade	0	0	280553	0	11518557	1021
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	7174	359	118419	5921
6	Accommodation services/Hotels	0	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	39835	0	0	0
18	Processed Food	0	0	14224	0	0	0
19	Alcohol & Tobacco products	0	0	554	0	0	0
20	Travel related consumer goods	0	0	39879	0	0	0
21	Footwear	0	0	2998	0	0	0
22	Soaps, cosmetics and glycerin	0	0	78246	0	0	0
23	Gems and jewellery	0	0	134629	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	314786	0	0	0
	Total Value of Output (Rs. Lakh)	7587402	0	14447887	359	11636975	6942
	Intermediate consumption (Rs. Lakh)	1188092	0	10428506	259	3040696	1814
	GVA (Rs. Lakh)	6399310	0	4019381	100	8596279	5128
	Tourism Industry Ratios (%)		0		0		0

Note - TS\* (Tourism share)

Source: NCAER Computations

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column					
		4	TS*	5	TS*	6	TS*
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	21308477	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	3971609	0	0	0	0	0
5	All non-tourism specific services	0	0	23727069	1186353	0	0
6	Accommodation services/Hotels	0	0	0	0	313077	225415
7	Food and beverage serving services/Restaurants	0	0	0	0	11051	5886
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	225566	79675	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed Food	0	0	0	0	0	0
19	Alcohol & Tobacco products	0	0	0	0	0	0
20	Travel related consumer goods	0	0	0	0	0	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics and glycerin	0	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	4197176	79675	45035546	1186353	324128	231301
	Intermediate consumption (Rs. Lakh)	2295087	43567	20411025	537680	213525	152374
	GVA (Rs. Lakh)	1902089	36107	24624521	648674	110603	78927
	Tourism Industry Ratios (%)		2		3		71

Note - TS\* (Tourism share)

Source: NCAER Computations

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column					
		7	TS*	8	TS*	9	TS*
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	0	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	394839	0
5	All non-tourism specific services	0	0	0	0	0	0
6	Accommodation services/Hotels	104359	75138	0	0	0	0
7	Food and beverage serving services/Restaurants	1945392	1036049	0	0	0	0
8	Railway passenger transport services	0	0	51110	35677	0	0
9	Road passenger transport services	0	0	0	0	2030098	717072
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed Food	0	0	0	0	0	0
19	Alcohol & Tobacco products	0	0	0	0	0	0
20	Travel related consumer goods	0	0	0	0	0	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics and glycerin	0	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	2049751	1111188	51110	35677	2424937	717072
	Intermediate consumption (Rs. Lakh)	1350311	732015	17243	12036	1348294	398700
	GVA (Rs. Lakh)	699440	379173	33867	23641	1076643	318371
	Tourism Industry Ratios (%)		54		70		30

Note - TS\* (Tourism share)

Source: NCAER Computations

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column					
		10	TS*	11	TS*	12	TS*
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	0	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	0	0	0	0
6	Accommodation services/Hotels	0	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	67786	4378	0	0	0	0
11	Air passenger transport services	0	0	485554	254762	0	0
12	Transport equipment rental services	0	0	0	0	4315	1640
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed Food	0	0	0	0	0	0
19	Alcohol & Tobacco products	0	0	0	0	0	0
20	Travel related consumer goods	0	0	0	0	0	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics and glycerin	0	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	67786	4378	485554	254762	4315	1640
	Intermediate consumption (Rs. Lakh)	47722	3082	373907	196183	1367	519
	GVA (Rs. Lakh)	20063	1296	111647	58579	2948	1120
	Tourism Industry Ratios (%)		6		52		38

Note - TS\* (Tourism share)

Source: NCAER Computations



**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column					
		13	TS*	14	TS*	15	TS*
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	0	0	0	0
3	Trade	0	0	0	0	0	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	0	0	0	0
6	Accommodation services/Hotels	0	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	17073	8751	0	0	0	0
14	Cultural and religious services	0	0	8629	6390	0	0
15	Sports and other recreational services	0	0	0	0	188538	10776
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed Food	0	0	0	0	0	0
19	Alcohol & Tobacco products	0	0	0	0	0	0
20	Travel related consumer goods	0	0	0	0	0	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics and glycerin	0	0	0	0	0	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	17073	8751	8629	6390	188538	10776
	Intermediate consumption (Rs. Lakh)	8954	4589	2955	2188	81543	4661
	GVA (Rs. Lakh)	8119	4161	5674	4202	106995	6115
	Tourism Industry Ratios (%)		51		74		6

Note - TS\* (Tourism share)

Source: NCAER Computations

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column					
		16	TS*	17	TS*	18	TS*
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	0	0	32877	0	21352	0
3	Trade	0	0	2451	0	68458	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	0	0	11	1	427	21
6	Accommodation services/Hotels	0	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical related services	2904429	1038564	0	0	0	0
17	Readymade garments	0	0	185424	0	0	0
18	Processed Food	0	0	0	0	3383434	0
19	Alcohol & Tobacco products	0	0	0	0	9415	0
20	Travel related consumer goods	0	0	2376	0	435	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics and glycerin	0	0	0	0	10505	0
23	Gems and jewellery	0	0	0	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	2904429	1038564	223139	1	3494027	21
	Intermediate consumption (Rs. Lakh)	1107201	395912	149818	0	2979664	18
	GVA (Rs. Lakh)	1797228	642652	73322	0	514362	3
	Tourism Industry Ratios (%)		36		0		0

Note - TS\* (Tourism share)

Source: NCAER Computations

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column					
		19	TS*	20	TS*	21	TS*
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	23582	0	38774	0	64	0
3	Trade	30066	0	4856	0	9	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	3447	172	517	26	0	0
6	Accommodation services/Hotels	0	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed Food	22019	0	0	0	0	0
19	Alcohol & Tobacco products	1402385	0	0	0	0	0
20	Travel related consumer goods	0	0	79463	0	164	0
21	Footwear	0	0	133883	0	277	0
22	Soaps, cosmetics and glycerin	18	0	0	0	0	0
23	Gems and jewellery	0	0	27746	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	0	0
	Total Value of Output (Rs. Lakh)	1481517	172	285240	26	513	0
	Intermediate consumption (Rs. Lakh)	854862	99	208296	19	363	0
	GVA (Rs. Lakh)	626655	73	76944	7	150	0
	Tourism Industry Ratios (%)		0		0		0

Note - TS\* (Tourism share)

Source: NCAER Computations

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Industry as per the Serial No. given in first column					
		22	TS*	23	TS*	24	TS*
1	Agriculture and allied	0	0	0	0	0	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	73252	0	4684	0	171558	0
3	Trade	1604	0	377	0	1423	0
4	Transport freight services	0	0	0	0	0	0
5	All non-tourism specific services	55	3	546	27	70	4
6	Accommodation services/Hotels	0	0	0	0	0	0
7	Food and beverage serving services/Restaurants	0	0	0	0	0	0
8	Railway passenger transport services	0	0	0	0	0	0
9	Road passenger transport services	0	0	0	0	0	0
10	Water passenger transport services	0	0	0	0	0	0
11	Air passenger transport services	0	0	0	0	0	0
12	Transport equipment rental services	0	0	0	0	0	0
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	0	0	0	0
14	Cultural and religious services	0	0	0	0	0	0
15	Sports and other recreational services	0	0	0	0	0	0
16	Health and medical related services	0	0	0	0	0	0
17	Readymade garments	0	0	0	0	0	0
18	Processed Food	1726	0	0	0	0	0
19	Alcohol & Tobacco products	67	0	0	0	0	0
20	Travel related consumer goods	71	0	268	0	231	0
21	Footwear	0	0	0	0	0	0
22	Soaps, cosmetics and glycerin	8975	0	0	0	0	0
23	Gems and jewellery	0	0	30776	0	0	0
24	Books, journals, magazines, stationery etc.	0	0	0	0	8004	0
	Total Value of Output (Rs. Lakh)	85750	3	36651	27	181286	4
	Intermediate consumption (Rs. Lakh)	67093	2	33090	25	140808	3
	GVA (Rs. Lakh)	18657	1	3562	3	40478	1
	Tourism Industry Ratios (%)		0		0		0

Note - TS\* (Tourism share)

Source: NCAER Computations

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Total Domestic Supply at BP	Tourism share	Product taxes less Subsidies	Tourism share	Output at Producer price (OP)	Tourism share
1	Agriculture and allied	7494436	0	-667624	0	6826812	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	35302594	0	4201152	0	39503746	0
3	Trade	11908354	1021	9060	0	11917414	1021
4	Transport freight services	4366448	0	61984	0	4428433	0
5	All non-tourism specific services	23857734	1192887	882966	44148	24740701	1237035
6	Accommodation services/Hotels	417435	300553	2456	1768	419891	302322
7	Food and beverage serving services/Restaurants	1956444	1041935	11526	6139	1967970	1048074
8	Railway passenger transport services	51110	35677	146	102	51256	35779
9	Road passenger transport services	2255664	796746	13229	4673	2268893	801419
10	Water passenger transport services	67786	4378	17173	1109	84958	5487
11	Air passenger transport services	485554	254762	5749	3016	491302	257778
12	Transport equipment rental services	4315	1640	29	11	4344	1651
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	17073	8751	3907	2002	20980	10753
14	Cultural and religious services	8629	6390	-21	-16	8608	6374
15	Sports and other recreational services	188538	10776	65426	3739	253965	14516
16	Health and medical related services	2904429	1038564	-2296	-821	2902132	1037743
17	Readymade garments	225259	0	50474	17917	275733	17917
18	Processed Food	3421402	0	181634	2416	3603037	2416
19	Alcohol & Tobacco products	1412422	0	314172	2595	1726594	2595
20	Travel related consumer goods	122888	0	18061	2558	140949	2558
21	Footwear	137158	0	11708	2411	148866	2411
22	Soaps, cosmetics and glycerin	97745	0	69347	1990	167092	1990
23	Gems and jewellery	193152	0	33732	15064	226884	15064
24	Books, journals, magazines, stationery etc.	322790	0	1634	72	324424	72
	Total Value of Output (Rs. Lakh)	97219361	4694079	5285623	110893	102504984	4804972
	Intermediate consumption (Rs. Lakh)	46350422	2485746				
	GVA (Rs. Lakh)	50868939	2208333				
	Tourism Industry Ratios (%)		4				

Note - TS\* (Tourism share)

Source: NCAER Computations

**Table 6: Total Supply and Internal Tourism Consumption –Kerala (Rs. Lakh) (Cont.)**

S. No.	Industry	Trade and Transport Margins (TTM)	Tourism share	Output at Purchaser's price (OP + TTM)	Tourism share
1	Agriculture and allied	3219044	0	10045856	0
2	Mining, other manufacturing, construction, electricity, gas and water supply	8023091	0	47526837	0
3	Trade	-11917414	-1021	0	0
4	Transport freight services	-4428433	0	0	0
5	All non-tourism specific services	0	0	24740701	1237035
6	Accommodation services/Hotels	0	0	419891	302322
7	Food and beverage serving services/Restaurants	0	0	1967970	1048074
8	Railway passenger transport services	0	0	51256	35779
9	Road passenger transport services	0	0	2268893	801419
10	Water passenger transport services	0	0	84958	5487
11	Air passenger transport services	0	0	491302	257778
12	Transport equipment rental services	0	0	4344	1651
13	Travel agencies and other reservation services/ Supporting and auxiliary transport activities	0	0	20980	10753
14	Cultural and religious services	0	0	8608	6374
15	Sports and other recreational services	0	0	253965	14516
16	Health and medical related services	0	0	2902132	1037743
17	Readymade garments	104501	136	380233	18054
18	Processed Food	3889398	278	7492435	2694
19	Alcohol & Tobacco products	716124	113	2442718	2708
20	Travel related consumer goods	66943	44	207892	2601
21	Footwear	64925	269	213791	2680
22	Soaps, cosmetics and glycerin	77924	60	245015	2050
23	Gems and jewellery	25307	22	252190	15086
24	Books, journals, magazines, stationery etc.	158591	99	483015	171
	Total Value of Output (Rs. Lakh)	0	0	102504984	4804972
	Intermediate consumption (Rs. Lakh)				
	GVA (Rs. Lakh)				
	Tourism Industry Ratios (%)			115010670	

Note - TS\* (Tourism share)

Source: NCAER Computations

**TSA Table 7: Employment in Tourism industries (Number of jobs)**

	Number of jobs		
	Self Employed	Employees	Total
1. Accommodation services/Hotels	886	17705	18590
2 Food and beverage serving services/Restaurants	158287	220315	378602
3 Railway passenger transport services	6054	14043	20097
4 Road passenger transport services	340413	300498	640911
5 Water passenger transport services	0	1933	1933
6 Air passenger transport services	0	5193	5193
7 Transport equipment rental services	2141	0	2141
8 Travel agencies and other reservation services/ Supporting and auxiliary transport activities	10148	43077	53225
9 Cultural and religious services	3495	73037	76532
10 Sports and other recreational services	52474	32472	84945
11 Health and medical related services	13185	330530	343715
Total jobs in tourism characteristic industries	587083	1038802	1625884
Total Jobs in the state	3832857	10681963	14514820
Share of Tourism in total	15.32	9.72	11.20

Source: NCAER computation

**Table 10.1: State-wise Eestimated number of households and persons**

States	Households			Persons		
	Rural	Urban	Total	Rural	Urban	Total
Jammu & Kashmir	15,20,631	4,85,388	20,06,019	76,49,291	22,61,378	99,10,670
Himachal Pradesh	13,64,113	214051	15,78,164	58,80,223	6,49,267	65,29,490
Punjab	34,58,705	25,74,170	60,32,875	1,63,33,883	95,41,305	2,58,75,188
Chandigarh	7730	192670	200400	33,612	7,48,512	7,82,124
Uttarakhand	14,65,093	557306	20,22,398	68,30,221	23,58,918	91,89,139
Haryana	30,23,247	18,74,356	48,97,603	1,57,42,452	82,18,356	2,39,60,808
Delhi	101604	32,25,854	33,27,458	4,30,017	1,32,62,782	1,36,92,799
Rajasthan	96,31,191	33,13,974	1,29,45,164	4,96,91,162	1,51,49,690	6,48,40,852
Uttar Pradesh	2,66,30,004	81,32,969	3,47,62,973	14,15,73,352	3,93,92,178	18,09,65,530
Bihar	1,69,74,924	20,37,288	1,90,12,212	8,33,21,237	98,64,355	9,31,85,593
Sikkim	103294	36105	1,39,399	4,05,490	1,12,410	5,17,900
Arunachal Pradesh	1,92,684	51282	2,43,967	9,18,894	2,00,684	11,19,579
Nagaland	2,62,575	102591	3,65,166	12,53,508	4,79,636	17,33,144
Manipur	3,78,132	1,68,516	5,46,647	19,08,504	8,04,656	27,13,160
Mizoram	114656	91,470	2,06,126	5,17,140	4,21,372	9,38,513
Tripura	6,65,001	193774	8,58,775	26,47,650	6,93,524	33,41,174
Meghalaya	4,97,989	125194	6,23,183	24,47,298	5,16,936	29,64,233
Assam	54,79,336	7,71,818	62,51,154	2,60,21,852	30,35,793	2,90,57,646
West Bengal	1,42,58,071	64,64,619	2,07,22,690	5,94,52,706	2,41,77,905	8,36,30,611
Jharkhand	47,61,190	14,45,003	62,06,194	2,42,50,347	64,27,222	3,06,77,569
Odisha	81,22,539	18,01,574	99,24,113	3,44,03,572	66,39,480	4,10,43,053
Chhattisgarh	43,67,924	11,86,143	55,54,067	1,91,87,915	48,00,730	2,39,88,645
Madhya Pradesh	1,04,79,028	38,58,775	1,43,37,803	5,05,38,282	1,71,85,652	6,77,23,934
Gujarat	67,24,622	53,23,086	1,20,47,708	3,24,48,409	2,40,21,335	5,64,69,744
Daman & Diu	13466	70288	83754	48,129	2,52,260	3,00,389
D & N Haveli	44176	42550	86726	1,53,857	1,51,894	3,05,751
Maharashtra	1,30,14,548	1,13,25,283	2,43,39,831	5,90,20,714	4,62,80,284	10,53,00,998
Andhra Pradesh	89,65,874	42,34,416	1,32,00,290	3,20,91,824	1,42,30,501	4,63,22,325
Karnataka	81,53,194	60,59,261	1,42,12,455	3,54,39,816	2,22,30,714	5,76,70,530
Goa	125329	238769	364098	5,36,144	8,08,796	13,44,940
Lakshadweep	2085	9752	11837	10,705	49,726	60,431
<b>Kerala</b>	<b>43,65,286</b>	<b>35,97,077</b>	<b>79,62,363</b>	<b>1,75,03,582</b>	<b>1,35,51,023</b>	<b>3,10,54,606</b>
Tamil Nadu	99,19,515	96,95,734	1,96,15,249	3,52,91,111	3,20,81,613	6,73,72,724
Puducherry	108799	216413	325212	3,56,291	7,52,723	11,09,014
A & N Islands	64791	44222	109013	2,42,504	1,45,529	3,88,034
Telangana	50,61,181	36,17,954	86,79,135	1,73,94,810	1,25,29,834	2,99,24,644
Total	170422524	83379697	253802221	78,19,76,506	33,40,28,976	1,11,60,05,481

Source: NCAER computation



**Table 10.2a: State-wise Trips per 100 households with leading purposes holidaying, medical and shopping**

States	Trips per 100 Households			Rank among states		
	Rural	Urban	Total	Rural	Urban	Total
Jammu & Kashmir	33.2	27.2	31.8	7	8	5
Himachal Pradesh	25.8	19.4	24.9	11	21	14
Punjab	25.0	31.4	27.7	13	7	10
Chandigarh	12.2	14.5	14.4	33	33	33
Uttarakhand	22.8	20.3	22.1	18	19	21
Haryana	20.7	25.5	22.6	22	12	19
Delhi	7.6	23.5	23.1	36	15	18
Rajasthan	23.8	21.0	23.1	17	17	17
Uttar Pradesh	18.0	18.5	18.1	29	25	29
Bihar	17.2	17.1	17.2	30	28	31
Sikkim	21.3	9.3	18.2	21	36	28
Arunachal Pradesh	43.9	44.6	44.0	4	3	3
Nagaland	16.4	15.7	16.2	31	31	32
Manipur	24.0	25.0	24.3	16	13	15
Mizoram	34.3	19.4	27.7	6	22	11
Tripura	25.3	26.2	25.5	12	11	12
Meghalaya	28.0	26.8	27.8	10	9	9
Assam	9.4	16.0	10.2	35	30	36
West Bengal	24.6	26.8	25.3	14	10	13
Jharkhand	18.9	37.1	23.2	28	6	16
Odisha	29.8	39.2	31.5	9	5	6
Chhattisgarh	11.5	15.5	12.3	34	32	35
Madhya Pradesh	19.4	21.8	20.0	25	16	23
Gujarat	20.4	19.1	19.8	23	23	24
Daman & Diu	21.8	18.8	19.3	20	24	26
D & N Haveli	19.2	19.4	19.3	26	20	25
Maharashtra	32.7	24.8	29.0	8	14	7
Andhra Pradesh	19.9	11.8	17.3	24	34	30
Karnataka	22.6	17.0	20.2	19	29	22
Goa	19.0	18.2	18.5	27	26	27
Lakshadweep	71.0	94.5	90.4	2	1	1
<b>Kerala</b>	<b>44.1</b>	<b>40.7</b>	<b>42.6</b>	<b>3</b>	<b>4</b>	<b>4</b>
Tamil Nadu	24.0	20.9	22.5	15	18	20
Puducherry	71.8	54.9	60.5	1	2	2
A & N Islands	36.0	17.6	28.5	5	27	8
Telangana	15.5	10.7	13.5	32	35	34
Total	22.1	22.4	22.2			

Source: NCAER computation

**TSA Table 10.2b: State-wise Trips per 100 households with rest of the leading purposes**

States	Trips per 100 Households			Rank among states		
	Rural	Urban	Total	Rural	Urban	Total
Jammu & Kashmir	33.2	27.2	31.8	7	8	5
Himachal Pradesh	25.8	19.4	24.9	11	21	14
Punjab	25.0	31.4	27.7	13	7	10
Chandigarh	12.2	14.5	14.4	33	33	33
Uttarakhand	22.8	20.3	22.1	18	19	21
Haryana	20.7	25.5	22.6	22	12	19
Delhi	7.6	23.5	23.1	36	15	18
Rajasthan	23.8	21.0	23.1	17	17	17
Uttar Pradesh	18.0	18.5	18.1	29	25	29
Bihar	17.2	17.1	17.2	30	28	31
Sikkim	21.3	9.3	18.2	21	36	28
Arunachal Pradesh	43.9	44.6	44.0	4	3	3
Nagaland	16.4	15.7	16.2	31	31	32
Manipur	24.0	25.0	24.3	16	13	15
Mizoram	34.3	19.4	27.7	6	22	11
Tripura	25.3	26.2	25.5	12	11	12
Meghalaya	28.0	26.8	27.8	10	9	9
Assam	9.4	16.0	10.2	35	30	36
West Bengal	24.6	26.8	25.3	14	10	13
Jharkhand	18.9	37.1	23.2	28	6	16
Odisha	29.8	39.2	31.5	9	5	6
Chhattisgarh	11.5	15.5	12.3	34	32	35
Madhya Pradesh	19.4	21.8	20.0	25	16	23
Gujarat	20.4	19.1	19.8	23	23	24
Daman & Diu	21.8	18.8	19.3	20	24	26
D & N Haveli	19.2	19.4	19.3	26	20	25
Maharashtra	32.7	24.8	29.0	8	14	7
Andhra Pradesh	19.9	11.8	17.3	24	34	30
Karnataka	22.6	17.0	20.2	19	29	22
Goa	19.0	18.2	18.5	27	26	27
Lakshadweep	71.0	94.5	90.4	2	1	1
<b>Kerala</b>	<b>44.1</b>	<b>40.7</b>	<b>42.6</b>	<b>3</b>	<b>4</b>	<b>4</b>
Tamil Nadu	24.0	20.9	22.5	15	18	20
Puducherry	71.8	54.9	60.5	1	2	2
A & N Islands	36.0	17.6	28.5	5	27	8
Telangana	15.5	10.7	13.5	32	35	34
Total	22.1	22.4	22.2			

Source: NCAER computation

**TSA Table 10.3a: State-wise (state of origin) percent distribution of trips with leading purposes holidaying, medical and shopping**

States	Holidaying	Medical	Shopping	Total
Jammu & Kashmir	28.1	66.0	5.9	100.0
Himachal Pradesh	18.8	81.0	0.2	100.0
Punjab	57.3	42.5	0.2	100.0
Chandigarh	85.7	4.4	9.8	100.0
Uttarakhand	44.1	54.7	1.2	100.0
Haryana	46.1	53.2	0.8	100.0
Delhi	92.6	6.9	0.5	100.0
Rajasthan	22.4	77.2	0.4	100.0
Uttar Pradesh	27.1	72.3	0.6	100.0
Bihar	25.7	73.2	1.1	100.0
Sikkim	31.0	65.3	3.7	100.0
Arunachal Pradesh	47.9	38.0	14.1	100.0
Nagaland	25.2	42.9	31.9	100.0
Manipur	25.6	55.3	19.1	100.0
Mizoram	14.8	49.9	35.4	100.0
Tripura	16.7	82.4	0.9	100.0
Meghalaya	43.5	45.9	10.6	100.0
Assam	23.0	73.8	3.2	100.0
West Bengal	26.8	72.9	0.3	100.0
Jharkhand	38.1	60.4	1.5	100.0
Odisha	40.8	58.5	0.6	100.0
Chhattisgarh	30.8	67.3	1.9	100.0
Madhya Pradesh	28.6	69.9	1.5	100.0
Gujarat	46.6	53.0	0.4	100.0
Daman & Diu	26.1	70.2	3.7	100.0
D & N Haveli	23.0	77.0	0.0	100.0
Maharashtra	54.7	44.5	0.8	100.0
Andhra Pradesh	13.1	86.4	0.5	100.0
Karnataka	32.1	66.7	1.1	100.0
Goa	18.0	80.0	2.0	100.0
Lakshadweep	11.1	71.1	17.8	100.0
<b>Kerala</b>	<b>19.2</b>	<b>80.3</b>	<b>0.5</b>	<b>100.0</b>
Tamil Nadu	29.2	69.9	0.9	100.0
Puducherry	72.1	27.4	0.5	100.0
A & N Islands	8.3	87.0	4.7	100.0
Telangana	26.3	73.6	0.1	100.0
Total	34.0	65.1	1.0	100.0

Source: NCAER computation

**TSA Table 10.3b: State-wise (state of origin) percent distribution of trips with rest of the leading purposes**

States	Business	Social	Religious	Education	Others	Total
Jammu & Kashmir	2.6	88.1	6.6	0.7	1.9	100.0
Himachal Pradesh	2.2	92.3	3.0	0.8	1.7	100.0
Punjab	2.6	78.0	16.5	0.6	2.4	100.0
Chandigarh	0.2	84.1	11.9	0.4	3.5	100.0
Uttarakhand	3.0	83.0	11.4	1.2	1.4	100.0
Haryana	0.5	90.8	5.6	1.5	1.7	100.0
Delhi	0.6	77.3	9.0	0.3	12.8	100.0
Rajasthan	2.4	88.6	6.2	1.0	1.8	100.0
Uttar Pradesh	1.8	89.4	4.4	1.2	3.3	100.0
Bihar	2.5	85.3	5.4	1.5	5.3	100.0
Sikkim	5.2	83.6	7.1	1.2	2.9	100.0
Arunachal Pradesh	15.5	41.7	10.1	9.5	23.2	100.0
Nagaland	14.6	64.9	3.7	4.3	12.5	100.0
Manipur	8.2	70.7	12.1	4.3	4.6	100.0
Mizoram	6.1	70.1	13.6	1.0	9.2	100.0
Tripura	0.2	94.3	1.2	0.7	3.7	100.0
Meghalaya	9.0	59.0	8.6	4.3	19.0	100.0
Assam	2.3	91.6	1.5	1.0	3.6	100.0
West Bengal	3.3	89.5	3.1	1.2	2.8	100.0
Jharkhand	1.1	91.3	2.8	1.8	3.0	100.0
Odisha	1.3	92.5	4.2	0.5	1.6	100.0
Chhattisgarh	1.8	91.1	3.6	2.0	1.5	100.0
Madhya Pradesh	1.1	91.3	4.8	0.6	2.2	100.0
Gujarat	2.1	88.5	8.4	0.4	0.6	100.0
Daman & Diu	4.4	94.2	1.4	0.0	0.0	100.0
D & N Haveli	0.0	99.3	0.5	0.2	0.0	100.0
Maharashtra	2.4	82.7	12.6	0.9	1.4	100.0
Andhra Pradesh	2.2	85.0	9.7	1.2	1.9	100.0
Karnataka	2.3	76.8	19.1	1.2	0.6	100.0
Goa	1.0	51.0	39.0	0.9	8.2	100.0
Lakshadweep	0.0	59.4	10.3	11.5	18.8	100.0
<b>Kerala</b>	<b>4.1</b>	<b>79.8</b>	<b>9.1</b>	<b>1.9</b>	<b>5.1</b>	<b>100.0</b>
Tamil Nadu	1.8	78.1	17.3	0.8	2.1	100.0
Puducherry	2.2	67.7	27.6	1.3	1.3	100.0
A & N Islands	25.6	60.4	4.1	1.3	8.6	100.0
Telangana	0.3	89.5	8.1	1.0	1.1	100.0
Total	2.2	85.9	8.3	1.1	2.5	100.0

*Source: NCAER computation*

**TSA Table 10.4a: State-wise (state of destination) percent distribution of trips with leading purposes holidaying, medical and shopping**

States	Holidaying	Medical	Shopping	Total
Jammu & Kashmir	52.4	43.7	3.9	100.0
Himachal Pradesh	55.2	44.7	0.1	100.0
Punjab	52.1	47.3	0.6	100.0
Chandigarh	25.1	73.1	1.8	100.0
Uttarakhand	64.5	34.6	0.9	100.0
Haryana	31.7	68.0	0.3	100.0
Delhi	44.1	53.6	2.3	100.0
Rajasthan	31.5	68.0	0.5	100.0
Uttar Pradesh	30.3	69.3	0.4	100.0
Bihar	31.4	67.5	1.1	100.0
Sikkim	85.0	14.5	0.4	100.0
Arunachal Pradesh	59.5	29.6	10.9	100.0
Nagaland	25.9	41.2	33.0	100.0
Manipur	29.6	53.2	17.3	100.0
Mizoram	20.1	45.3	34.6	100.0
Tripura	18.9	80.0	1.0	100.0
Meghalaya	47.7	41.7	10.6	100.0
Assam	20.0	75.5	4.5	100.0
West Bengal	22.8	76.9	0.4	100.0
Jharkhand	41.2	57.2	1.6	100.0
Odisha	42.6	56.6	0.7	100.0
Chhattisgarh	24.9	73.9	1.1	100.0
Madhya Pradesh	27.2	71.2	1.6	100.0
Gujarat	33.3	66.2	0.4	100.0
Daman & Diu	37.7	62.3	0.0	100.0
D & N Haveli	30.8	69.2	0.0	100.0
Maharashtra	49.2	50.0	0.9	100.0
Andhra Pradesh	21.0	78.6	0.4	100.0
Karnataka	30.1	68.7	1.2	100.0
Goa	85.8	13.9	0.3	100.0
Lakshadweep	48.7	49.1	2.2	100.0
<b>Kerala</b>	<b>17.2</b>	<b>82.7</b>	<b>0.1</b>	<b>100.0</b>
Tamil Nadu	31.3	67.7	1.0	100.0
Puducherry	23.2	76.8	0.0	100.0
A & N Islands	51.6	45.2	3.2	100.0
Telengana	-	-	-	-
Total	34.0	65.1	1.0	100.0

Source: NCAER computation

**TSA Table 10.4b: State-wise (state of destination) percent distribution of trips with rest of the leading purposes**

States	Business	Social	Religions	Education	Others	Total
Jammu & Kashmir	2.5	81.1	13.8	0.6	2.0	100.0
Himachal Pradesh	1.7	85.8	8.4	2.1	2.0	100.0
Punjab	2.8	81.4	13.1	0.8	1.9	100.0
Chandigarh	4.6	88.9	0.9	1.8	3.8	100.0
Uttarakhand	5.3	65.2	27.0	1.3	1.2	100.0
Haryana	0.4	93.7	2.9	0.9	2.1	100.0
Delhi	9.9	71.8	3.1	6.5	8.7	100.0
Rajasthan	1.7	89.1	6.8	0.9	1.5	100.0
Uttar Pradesh	1.5	89.5	4.2	1.0	3.8	100.0
Bihar	2.1	88.4	3.8	0.6	5.1	100.0
Sikkim	1.5	80.1	5.1	7.8	5.5	100.0
Arunachal Pradesh	11.7	40.7	17.7	8.9	20.9	100.0
Nagaland	14.2	64.9	3.4	3.0	14.6	100.0
Manipur	6.7	75.8	10.3	3.3	4.0	100.0
Mizoram	5.5	72.1	12.9	0.7	8.8	100.0
Tripura	3.7	90.3	1.0	0.7	4.3	100.0
Meghalaya	6.2	60.4	8.5	4.4	20.6	100.0
Assam	3.1	90.8	1.5	1.2	3.5	100.0
West Bengal	2.1	90.9	3.0	1.2	2.7	100.0
Jharkhand	2.3	88.4	5.3	1.3	2.7	100.0
Odisha	1.6	92.1	4.3	0.5	1.5	100.0
Chhattisgarh	1.5	90.5	4.7	1.8	1.5	100.0
Madhya Pradesh	1.1	91.3	5.3	0.6	1.6	100.0
Gujarat	3.2	88.8	6.7	0.4	0.9	100.0
Daman & Diu	38.7	61.3	0.0	0.0	0.0	100.0
D & N Haveli	0.0	99.2	0.8	0.0	0.0	100.0
Maharashtra	2.9	80.9	13.3	1.3	1.6	100.0
Andhra Pradesh	1.1	84.7	11.5	1.2	1.4	100.0
Karnataka	3.8	79.0	15.1	1.0	1.1	100.0
Goa	5.2	63.1	27.8	0.0	3.9	100.0
Lakshadweep	0.0	59.1	10.5	11.1	19.3	100.0
<b>Kerala</b>	<b>2.2</b>	<b>81.8</b>	<b>8.6</b>	<b>1.9</b>	<b>5.6</b>	<b>100.0</b>
Tamil Nadu	1.8	78.9	16.7	0.6	1.9	100.0
Puducherry	0.7	80.2	18.9	0.0	0.2	100.0
A & N Islands	25.5	62.4	3.1	1.0	8.0	100.0
Telengana	-	-	-	-	-	-
Total	2.2	85.9	8.3	1.1	2.5	100.0

Source: NCAER computation

**TSA Table 10.5: State-wise distribution of trips (with 365 days reference period) by main destination**

States	Destination within the district	Destination outside the district but within the state	Destination outside the state but within the country	Final port of departure in Indian Territory for International trip	Total
Jammu & Kashmir	45.2	42.7	12.1	0.0	100.0
Himachal Pradesh	59.9	17.0	22.9	0.2	100.0
Punjab	30.7	47.3	21.7	0.3	100.0
Chandigarh	1.9	2.0	96.1	0.0	100.0
Uttarakhand	29.8	54.0	16.1	0.0	100.0
Haryana	38.9	22.8	37.7	0.7	100.0
Delhi	2.1	3.8	93.9	0.2	100.0
Rajasthan	49.1	33.5	17.4	0.1	100.0
Uttar Pradesh	50.8	32.4	16.6	0.2	100.0
Bihar	44.8	41.8	13.1	0.3	100.0
Sikkim	32.5	28.4	38.5	0.6	100.0
Arunachal Pradesh	27.2	37.1	35.4	0.3	100.0
Nagaland	39.4	49.8	10.9	0.0	100.0
Manipur	29.6	58.5	11.7	0.1	100.0
Mizoram	54.1	37.4	8.5	0.0	100.0
Tripura	43.2	35.5	21.3	0.0	100.0
Meghalaya	43.0	37.6	19.3	0.0	100.0
Assam	38.4	49.0	12.5	0.1	100.0
West Bengal	55.5	27.5	16.6	0.4	100.0
Jharkhand	49.7	30.3	20.0	0.0	100.0
Odisha	62.2	29.1	8.8	0.0	100.0
Chhattisgarh	47.4	34.6	17.8	0.2	100.0
Madhya Pradesh	46.6	32.9	20.4	0.2	100.0
Gujarat	40.3	38.9	20.4	0.4	100.0
Daman & Diu	32.2	3.4	62.0	2.4	100.0
D & N Haveli	65.1	2.6	32.4	0.0	100.0
Maharashtra	46.5	38.4	14.9	0.2	100.0
Andhra Pradesh	70.9	20.9	8.0	0.1	100.0
Karnataka	40.8	39.7	19.5	0.0	100.0
Goa	63.3	13.8	20.2	2.7	100.0
Lakshadweep	21.9	9.3	68.8	0.0	100.0
<b>Kerala</b>	<b>65.2</b>	<b>21.2</b>	<b>13.5</b>	<b>0.2</b>	<b>100.0</b>
Tamil Nadu	48.6	42.4	9.0	0.0	100.0
Puducherry	26.0	3.2	70.8	0.0	100.0
A & N Islands	63.0	13.5	23.4	0.0	100.0
Telangana	56.6	36.7	6.7	0.0	100.0
Total	49.2	33.7	16.9	0.2	100.0

Source: NCAER computation

**TSA Table 10.6: State-wise distribution of trips (with 365 days reference period) by starting month of travel**

States	January	February	March	April	May	June	July	August	September	October	November	December	Total
Jammu & Kashmir	5.7	7.5	9.0	6.5	9.2	14.2	12.1	8.8	6.5	6.9	7.0	6.6	100.0
Himachal Pradesh	7.0	6.5	9.5	6.5	7.1	10.3	11.5	10.4	9.6	6.8	8.0	6.9	100.0
Punjab	5.5	5.8	7.6	6.1	3.5	15.8	9.6	8.5	5.4	13.5	4.5	14.3	100.0
Chandigarh	3.1	16.0	5.9	14.1	1.7	31.7	1.6	5.1	4.8	3.0	5.1	7.9	100.0
Uttarakhand	6.3	8.0	8.2	7.0	12.0	14.8	8.0	8.4	6.0	11.2	4.2	5.9	100.0
Haryana	7.5	5.4	6.9	8.5	11.5	19.5	6.9	8.6	5.4	6.8	7.7	5.3	100.0
Delhi	9.4	8.4	7.1	8.3	14.2	17.0	4.0	6.2	3.1	11.4	5.1	5.7	100.0
Rajasthan	6.5	7.9	5.7	6.4	10.5	11.6	10.1	9.4	7.4	11.5	7.3	5.8	100.0
Uttar Pradesh	6.7	7.2	7.9	8.3	9.0	12.7	9.2	10.3	7.4	10.4	6.2	4.6	100.0
Bihar	7.8	6.0	9.7	6.5	10.0	11.9	8.2	10.2	8.5	9.6	6.6	5.1	100.0
Sikkim	9.7	5.2	9.7	4.5	8.8	4.5	6.7	8.8	11.4	11.5	7.4	11.7	100.0
Arunachal Pradesh	10.4	7.1	5.2	7.9	8.9	6.7	9.7	11.7	8.4	8.8	6.6	8.5	100.0
Nagaland	5.8	8.8	3.7	8.3	5.4	6.0	10.4	6.8	8.0	6.2	7.6	23.0	100.0
Manipur	6.5	9.9	9.3	10.7	11.3	8.9	9.6	10.2	5.3	6.8	6.5	5.0	100.0
Mizoram	4.6	4.6	5.3	7.8	7.1	12.6	6.9	12.1	8.4	8.9	7.3	14.5	100.0
Tripura	4.8	9.4	10.0	14.0	9.1	7.9	11.2	8.3	8.3	6.3	5.2	5.4	100.0
Meghalaya	8.1	7.9	6.5	5.0	6.9	8.4	6.5	5.4	6.9	12.2	9.0	17.2	100.0
Assam	11.6	6.9	8.1	8.3	6.4	6.1	7.6	7.9	8.4	12.3	7.7	8.9	100.0
West Bengal	8.8	8.4	8.0	8.5	7.5	7.8	9.2	9.2	8.8	9.2	6.5	8.0	100.0
Jharkhand	5.2	6.2	8.3	5.1	12.8	9.0	7.8	8.8	6.7	14.5	5.9	9.7	100.0
Odisha	8.4	6.2	6.8	7.3	8.4	11.2	8.3	7.8	6.6	14.0	5.6	9.4	100.0
Chhattisgarh	6.7	12.5	6.0	6.8	10.5	9.1	8.3	7.6	8.5	8.6	8.7	6.7	100.0
Madhya Pradesh	6.6	6.6	7.7	7.6	11.6	8.8	9.9	10.8	7.1	10.9	7.5	5.0	100.0
Gujarat	6.7	6.3	6.4	8.0	11.2	8.3	7.0	10.0	6.9	14.1	8.9	6.2	100.0
Daman & Diu	13.0	8.3	4.2	7.3	13.8	12.4	3.5	1.8	3.9	5.0	6.3	20.4	100.0
D & N Haveli	7.0	6.1	5.0	5.4	2.2	9.6	17.1	10.4	9.6	10.4	6.8	10.4	100.0
Maharashtra	8.5	6.1	6.6	7.5	13.6	7.1	7.3	9.3	6.8	11.0	7.3	9.1	100.0
Andhra Pradesh	8.6	6.1	4.0	8.0	13.9	5.7	8.7	9.6	9.5	9.4	7.8	8.8	100.0
Karnataka	10.0	6.0	7.1	8.1	8.0	10.0	8.0	10.4	7.4	9.1	7.3	8.4	100.0
Goa	8.0	6.1	3.8	8.3	18.7	3.9	3.1	13.3	7.7	12.6	7.3	7.1	100.0
Lakshadweep	23.2	5.2	2.2	1.6	4.2	2.1	8.5	7.9	10.3	6.7	15.1	13.0	100.0
<b>Kerala</b>	<b>8.5</b>	<b>8.5</b>	<b>6.5</b>	<b>9.7</b>	<b>9.2</b>	<b>6.5</b>	<b>8.9</b>	<b>9.2</b>	<b>8.5</b>	<b>9.0</b>	<b>7.0</b>	<b>8.5</b>	<b>100.0</b>
Tamil Nadu	6.7	6.4	6.8	10.0	20.0	8.1	8.4	7.8	7.7	6.5	5.8	5.8	100.0
Puducherry	6.3	5.2	4.3	10.6	21.3	5.7	6.4	14.2	7.6	7.6	4.6	5.9	100.0
A & N Islands	5.0	7.4	7.1	6.8	13.3	12.5	10.6	6.7	6.4	8.2	11.0	5.1	100.0
Telangana	9.0	5.3	8.0	6.0	15.6	7.4	7.1	9.5	8.0	10.6	5.7	7.7	100.0
Total	7.7	6.9	7.2	7.9	11.0	9.7	8.5	9.3	7.5	10.3	6.7	7.4	100.0

Source: NCAER computation





## VI. SUMMARY AND FINDINGS

















This report provides various tourism statistics and economic aggregates, obtained in the compilation of Tourism Satellite Account for Kerala. These statistics and aggregates include the intensity of tourism activity in terms of number of trips or number of tourists; tourism consumption by different forms of tourism; Gross Value Added of Tourism Industries (GVATI); Tourism Direct Gross Value Added (TDGVA); Tourism Employment; and most importantly, the contribution of TDGVA to State Total GVA and of Tourism Employment to State Total Employment. The contribution is obtained taking into account both direct and indirect effects of tourism, where indirect effects arise due to inter-linkages of tourism with other sectors of the economy. The key findings of the report are summarized as follows:

- An estimated number of 5.66 lakh international tourists visited the state during 2015-16. This constitutes one part of inbound tourism in the state. The other part refers to the trips undertaken by tourists from other states of the country to the state of reference. These were 34.10 lakh in number.
- Domestic or intrastate trips stood at 4.81 crore. This is 4.01 percent of the country's total domestic trips<sup>5</sup>.
- Total Internal Tourism expenditure incurred by all inbound, domestic and outbound tourists, amounted to Rs. 37771.5 crore during 2015-16. Imputed Tourism consumption stood at Rs. 5926.27 crore. Together, these constitute the Total Internal Tourism Consumption and is estimated at Rs. 43697.78 crore.
- The state's share in All-India's Total Internal Tourism Consumption is 4.58 percent.
- The state's employment, in terms of number of jobs, is estimated at 145.15 lakh. The number of jobs in tourism characteristic industries, referred to as tourism employment, is 16.26 lakh. The direct share of tourism in employment, hence, is 11.20 percent.
- Total GVA of the state was Rs. 508689.39 crore in 2015-16. Tourism Direct GVA (TDGVA) is estimated at Rs. 22083.33 crore for the same year. The state's share in All-India GVA is 4.08 percent while the same in All-India TDGVA is 6.37 percent.

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<sup>5</sup> While national level domestic trips and state level domestic trips are conceptually different as national level domestic trips are a combination of all states' domestic trips and also inter-state trips. However, both refer to the movement within the respective geographical boundary.

**Table VI.1: Key Tourism Statistics**

<b>Estimated number of Tourists/Trips</b>			
	State (Number)	All India (Number)	Share in All-India
Inbound tourists - international	566671	13522814	 4.19
Inbound trips - other states	3410166	-	0
Domestic trips	48151935	1201955810	 4.01
Outbound tourists	3914873	20291635	 19.29
<b>Estimated Tourism Consumption</b>			
	State (Rs. Lakh)	All India (Rs. Crore)	Share in All-India
Inbound	821914	235331	 3.49
- international	274247	235331	 1.17
- other states	547667	0	0
Domestic	2291457	553193	 4.14
Outbound	663779	24575	 27.01
Imputed	592627	141280	 4.19
Total Internal	4369778	954379	 4.58
<b>Employment - Number of jobs</b>			
	State (lakh numbers)	All India (lakh numbers)	Share in All-India
Total Employment (in lakh)	145.15	5838.45	 2.49
Tourism Characteristic Industries	16.26	315.10	 5.16
<b>Gross Value Added</b>			
	State (Rs. Lakh)	All India (Rs. Lakh)	Share in All-India
Gross Value Added (GVA) at basic prices	50868939	1245864229	 4.08
Tourism Characteristic Industries (GVATI) (1)	3973228	59857757	 6.64
Tourism Connected Industries (2)	1354131	34559289	 3.92
Tourism Specific Industries (1+2)	5327359	94417045	 5.64
Tourism Direct GVA	2208333	34649328	 6.37

### Tourism share in economy

Any economic sector of a region contributes directly and indirectly to the economy of that region. The direct contribution is the share of its GVA and employment in the region's GVA and employment respectively. The indirect contribution arises due to the inter-industry linkages between the sector and the sectors in its supply chain. Stronger the linkages, bigger is the indirect contribution. The sum of direct and indirect shares amount to total share of tourism in economy.

The key findings on direct and indirect shares of tourism to state GVA and employment are the following:

- Tourism (TDGVA) contributes 4.34 percent to the state GVA as its direct share. As compared to this, the direct share of TDGVA to total GVA at All-India level is 2.78 percent.

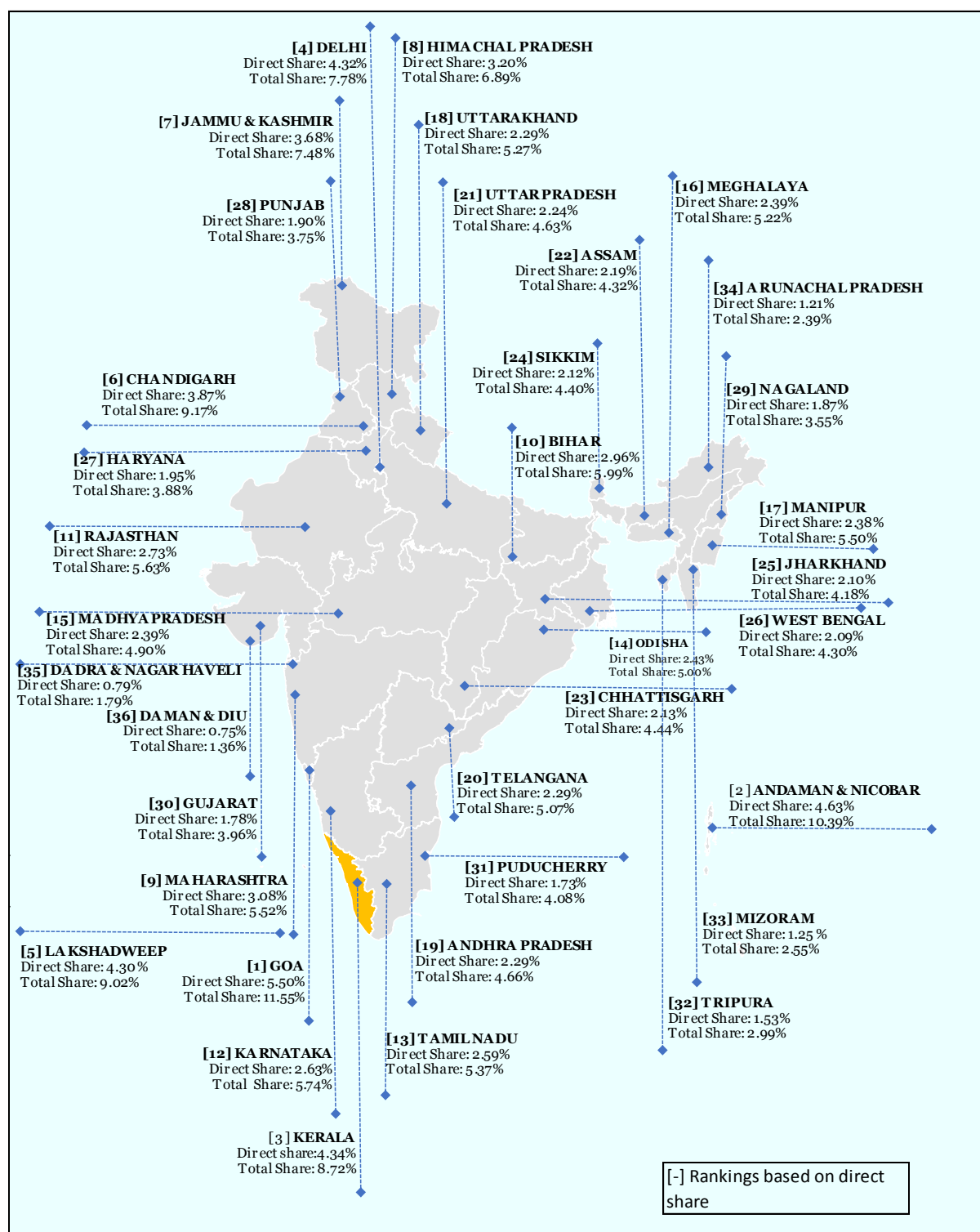
- Tourism's direct share in employment, in terms of number of jobs, is also higher than the All-India share. It is estimated at 11.20 percent for the state, compared with 5.40 percent for the country.
- The GVA multiplier, derived using the input-output model based on commodity X commodity IO matrix, is 2.0092.
- The employment multiplier, derived using the input-output model based on industry X industry IO matrix, is 2.3093.
- The total share of tourism to state GVA and employment is derived by multiplying the direct shares with the corresponding multiplier.
- Hence, the total share of tourism in GVA and in employment translates to 15.69 percent and 25.87 percent respectively.
- Table VI.2 presents these shares for state of reference and for All-India.

**Table VI.2: Contribution of Tourism in economy (%)**

Item	Kerala	All India
Tourism Direct GVA, TDGVA	4.34	2.78
GVATI	7.81	4.80
Tourism Employment	11.20	5.40
GVA multiplier	2.0092	1.9236
Employment multipliers	2.3093	2.2931
TDGVA - direct and indirect	8.72	5.35
GVATI-direct and indirect	15.69	9.24
Tourism Employment - direct and indirect	25.87	12.38

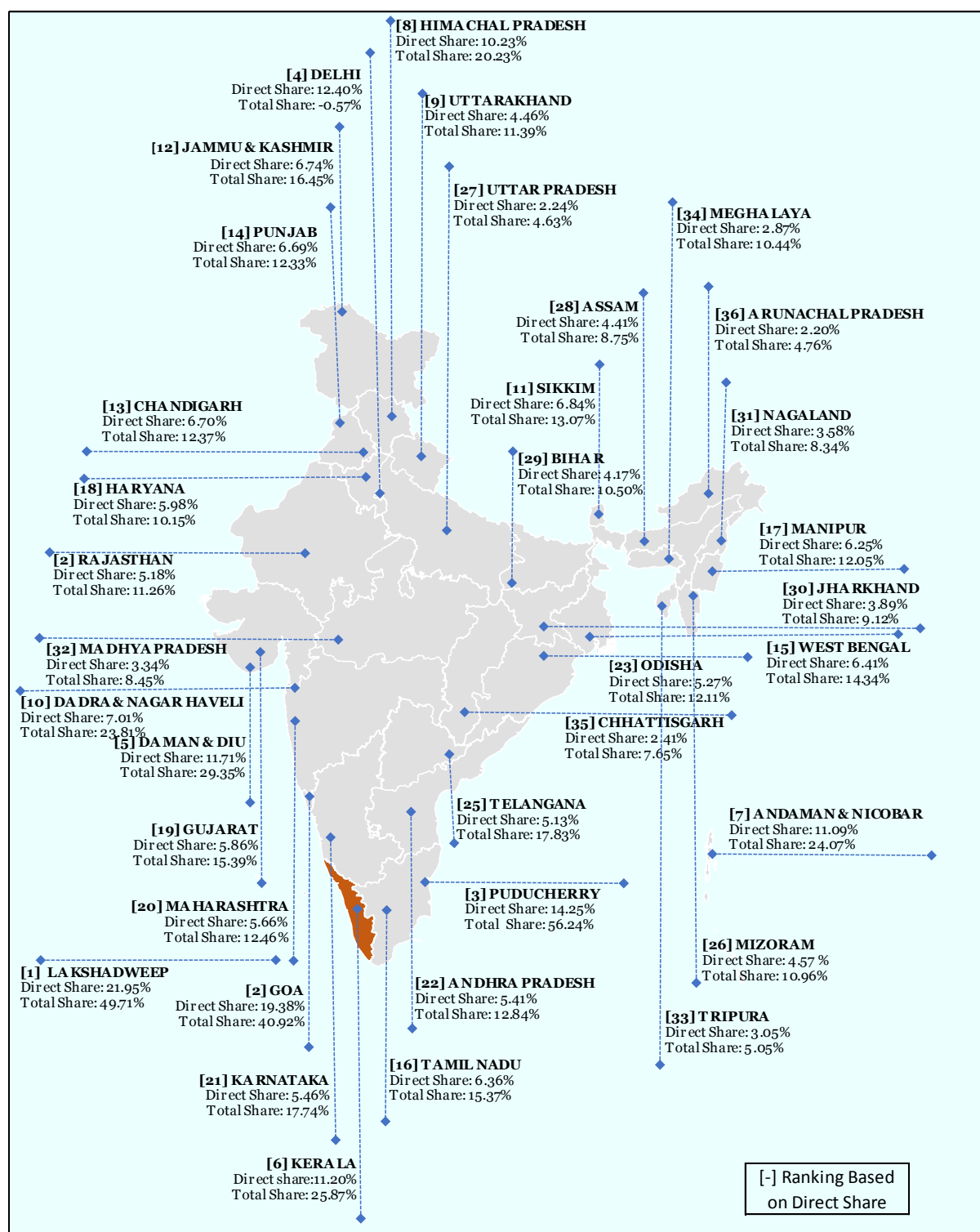
The maps below present the direct and indirect shares of tourism in GVA (Map 1) and employment (Map 2) for all the states and UTs of India, along with the states' rank on direct shares.

# Direct and Indirect share of GVA by States and Union Territories



Source: NCAER Compilations

**Figure VI.2: Direct and Indirect share of Employment by States and Union Territories**



Source: NCAER Compilations



## **Annexure 1**

### **Key Challenges in preparing RTSA**

This report presents the RTSA tables and methodology adopted in the preparation of RTSAs or TSAs at regional/state level. To the extent possible, the methodology conforms with the international recommended methodology to prepare national TSAs, as documented in the TSA:RMF-2008. However, due to certain data limitations, a number of assumptions, proxy indicators and national level rates and ratios have been used so as to arrive at a complete set of TSA tables and accounts. Out of the total recommended 10 tables, TSA Table 8 on Gross Fixed Capital Formation for Tourism industries and TSA Table 9 on Gross Collective Consumption could not be prepared at all.

The key challenges involved in the preparation of RTSAs are listed as follows:

1. Demand side data, at state-level, are sourced from the same sources as those for national level, that is, International Passenger Survey (IPS) and Domestic Tourism Survey (DTS). In the IPS, the information on states of destination is not directly captured by the international tourists. Hence, we have used the data on expenditure incurred in the “last place of night halt (LNPH)” which are locations within states. The expenditure pattern observed in LNPH is imposed on the officially available number of foreign arrivals in the state.
2. For many states, these data might not be representing actual expenditure pattern, especially for different types of international tourists.
3. Also, IPS being a nationally representative survey, lacked sufficient data points for locations within some of the smaller states. In those cases, national-level inbound tourism expenditure pattern has been used.
4. Pre-trip Outbound Tourism Expenditure, although the least of all the components of total internal tourism consumption, could not be estimated for the tourists who are residents of state of reference and travel to other states of India. Only pre-trip outbound tourism expenditure incurred by residents travelling abroad could be estimated.
5. From supply side, there are bigger limitations as the disaggregated production account or the Supply and Use tables (SUT) for states are not available. The GSDP statement, along with the national SUT ratios have been used to prepare the state level SUTs with production account of all the 19 tourism-specific and 5 tourism non-specific industries.
6. The Tourism Industry Ratios (TIR) for 2009-10 were derived from the aggregate GSDP numbers and using ratio of state level private final consumption expenditure (PFCE) to national level PFCE. This was because a complete SUT with total supply of industries could not be prepared. SUT with only domestic supply could be prepared. However, for the present RTSAs for 2015-16, attempt has been made to construct the complete SUT with total supply of industries. Hence, the TIRs have been derived from the SUT framework, as in the case of national-level TSA. The tourism shares in GDP, as given in 2009-10 and in 2015-16, are therefore not strictly comparable.



## **Annexure 2**

### **Study visit to Australia**

As part of the Terms of Reference of the study, a study visit was undertaken to Australia during 11<sup>th</sup> to 17<sup>th</sup> January 2019. The purpose of the study visit was to understand the methodology adopted by the country in preparing their national and, in particular, the sub-national TSAs. Australia was chosen for the study visit as it is one of the few countries which prepare the TSAs at sub-national level or state-level and occasionally even at sub-state level.

#### **Planning the Study Visit**

For the study visit, Tourism Research Australia (TRA) was contacted in July, 2018 through e-mail. TRA happily accepted to host the team from NCAER and MoT and confirmed their availability in the second-third weeks of Jan, 2019. The agendas of the visit were proposed to be the following:

- Understand the methodology of Australian TSA
- Understand the methodology of constructing Regional TSA
- Data collection of International and particularly Domestic Visitor Surveys
- Data on employment for TSA
- Australian Supply and Use Table – preparation and conversion to Input-Output Table

Given the above agenda, it was decided that the study visit will include meeting the officials from TRA and Australian Bureau of Statistics (ABS) in Canberra and with Prof. Tien Pham at Griffith University in Brisbane.

#### **Study Team to Australia**

The study team comprised the following officials:

*From MoT:*

1. Mr. P C. Cyriac, ADG, MoT
2. Mr. Shailesh Kumar, Director, MoT

*From NCAER:*

3. Dr. Poonam Munjal, Team Leader
4. Dr. Palash Baruah
5. Asrar Alam

#### **Participants from Australia**

*Meeting in Austrade, Canberra*

1. Dr. David Smith, Manager Strategic Research and Analysis, Tourism Research Australia, Austrade
2. Mr. Jai Kookana, Principal Analyst, Tourism Research Australia, Austrade.
3. Mr. Sean Thompson, Assistant Director, Tourism and Transport Satellite Accounts Business Indicators Branch, Australian Bureau of Statistics

4. Mr. Peter R William and Mr. Marco Sun, National Accounts Benchmark Section, Australian Bureau of Statistics
5. Mr. Rod Battye, Tourism Statistics Team, Tourism Research Australia

*Meeting in Griffith University, Brisbane*

6. Dr Tien Pham, Principal Research Fellow, Griffith Institute for Tourism, Griffith University.

### **Meeting in AUSTRADE**

After a round of introduction of each participant, India team (NCAER and MoT) briefly discussed the purpose of the study visit and talked about the methodology which India follows in preparing its national and state-level TSAs.

Following this, Mr. Sean Thompson gave a detailed presentation on Australian TSA at national level. Australian TSA (ATSA) is prepared by the Tourism Research Australia (TRA) which produces a wide range of tourism research information at the national, state/territory and regional level. The Regional Tourism Profiles provide the tourism industry, tourism researchers, planners and policy makers with comprehensive activity data on the “tourism regions” in Australia.

Mr. Sean’s presentation was followed by another presentation by Mr. Peter R William and Mr. Marco Sun on Australian Supply and Use Tables (SUTs) and their conversion to Input-Output Tables (IO).

The key features of ATSA are:

- ATSA estimates and releases only direct contribution of Tourism GVA and GDP. The indirect contribution is not measured although there are some unpublished estimates on indirect contribution too.
- The ATSA is published on annual basis.
- Tourism employment is measured by the hours worked and value added per hours worked.
- No attempt is made to estimate the valuables or Tourism Gross Fixed Capital Formation
- The demand side data for TSA are collected through two nation-wide primary surveys, namely, the International Visitor Survey (IVS) and the National Visitor Survey (NVS).
- The IVS canvasses a total of 40,000 respondents every year and the NVS collects information from about 1,20,000 respondents every year. NVS is conducted entirely on mobile phone.
- The supply side data are obtained from the Annual Supply and Use Tables. The additional industry data are collected from the economy-wide business surveys to capture more detailed data on service industries.

The key features of SUTs are:

- The Australian SUTs ensure that the GDP is balanced for all three approaches – production, expenditure and income.
- Various data sources are used in the compilation of SUT.
- The SUT comprises of 67 industries and 301 products.
- Only prepared at national level.

- It is very rare that the different data sources balance without adjustments. Significant imbalances are manually reviewed and adjusted. Expert decisions are made to adjust the data.
- For the remaining adjustments, Constrained Optimisation Tool is used for balancing the SUT.
- The Australian IO Tables are used for several applications like economic modelling, environmental extensions to IO tables, productivity analysis, producer prices indices, environmental-economic accounts and satellite accounts

In the end, there was an interactive session of discussion with Mr. Rod Battye, who gave an overview of the IVS and NVS. The Indian team discussed about the similar Indian surveys – International Passenger Survey (IPS) and Domestic Tourism Survey (DTS). For regional TSAs, statistics on tourism profile are used in conjunction with other information sources, such as population statistics, feedback from local operators etc.

TRA has augmented the tourism expenditure survey data to estimate State Tourism Satellite Account as well as building in-house modelling capacity to carry out tourism economic impact analysis (a State tourism CGE model).

### **Meeting in GRIFFITH UNIVERSITY**

The Indian team met Prof Tien Pham and his colleagues/students in Griffith University, located in Gold Coast. Prof Pham gave a presentation on the methodology adopted in preparation of ATSA at national and sub-national level. While the national level TSAs are prepared by TRA, Prof Pham prepares the sub-national TSAs for Australia. He has also worked extensively on tourism economic impact analysis using the CGE model. CGE model, being dynamic in nature, is an efficient tool to assess the impact of tourism.

He has also published research papers on other tourism related areas like sustainable tourism, sub-state level TSA, hybrid approach to derive tourism economic data at regional level.

The key features of sub-national TSA are:

- Top-bottom approach is followed. The sub-national or state shares are applied to disaggregate the national TSA into sub-national or state TSAs.
- Similarly, if state TSA is available, then for regional TSAs, the regional shares are applied to disaggregate the state TSA.
- Regional TSAs have been prepared for the regions of Queensland.
- For allocating the expenditures in each location of the regions, TRA adopts the iterative procedure and applies on the data collected by IVS and NVS.

### **Key Take-aways for India**

The India team benefited immensely from the study visit to Australia. There was rich discussion on how both the countries, Australia and India, prepare their national and sub-national TSAs, conforming to the international methodology recommended by UNWTO.

There was a detailed discussion on how Tourism surveys are conducted in several states of India and the extensive procedure involved in these studies was much appreciated by the ABS and TRA officials.

For the preparation of India's state-level SUTs, it was suggested that Constrained Optimisation Tool may be attempted. Also, as a way forward and for the research purpose, CGE modelling may be attempted to carry out the impact analysis of Tourism sector.

In all, the study visit turned out to be extremely fruitful for the entire Indian team. The hospitality of the Australian team is much appreciated.



## GLOSSARY

### ***Basic Price***

The basic price is the amount receivable by the producer from the purchaser for a unit of a good or service produced as output minus any tax payable, and plus any subsidy receivable, on that unit as a consequence of its production or sale; it excludes any transport charges invoiced separately by the producer.

### ***Business And Government Tourism Consumption***

Also referred to as internal tourism consumption by domestic business and government visitors. Consists of the tourism consumption by resident businesses or governments on tourism related products within the economy.

### ***Central Product Classification (CPC)***

The central product classification (CPC) is a classification based on the physical characteristics of goods or on the nature of the services rendered; each type of good or service distinguished in the CPC is defined in such a way that it is normally produced by only one activity as defined in ISIC.

### ***CIF Price***

The CIF price (i.e. Cost, insurance and freight price) is the price of a good delivered at the frontier of the importing country, including any insurance and freight charges incurred to that point, or the price of a service delivered to a resident, before the payment of any import duties or other taxes on imports or trade and transport margins within the country; in SNA 1993 this concept is applied only to detailed imports.

### ***Compensation of Employees***

Compensation of employees is the total remuneration, in cash or in kind, payable by an enterprise to an employee in return for work done by the latter during the accounting period.

### ***Consumption of Fixed Capital***

Consumption of fixed capital represents the reduction in the value of the fixed assets used in production during the accounting period resulting from physical deterioration, normal obsolescence or normal accidental damage.

### ***Direct Tourism Gross***

Is direct tourism gross value added plus net taxes on products that are attributable to the tourism industry

<b><i>Domestic Product</i></b>	(tourism net taxes on products). Direct tourism GDP will generally have a higher value than direct tourism value added. Direct tourism GDP is a satellite account construct to enable a direct comparison with the most widely recognised national accounting aggregate, GDP. While it is useful in this context, the direct tourism gross value added measure should be used when making comparisons with other industries or between countries. See also Direct tourism gross value added and Tourism net taxes on products.
<b><i>Direct Tourism Gross Value Added</i></b>	The value of direct tourism output at basic prices, less the value of the inputs used in producing these tourism products. This measure is directly comparable with the value added of 'conventional' industries such as mining and manufacturing and should also be used for comparisons across countries. See also Direct tourism output and Direct tourism GDP.
<b><i>Direct Tourism Output</i></b>	The value of goods and services, at basic prices, which are consumed by visitors and produced in the economy by industries in a direct relationship with visitors.
<b><i>Domestic Output</i></b>	Domestic output is output produced by resident enterprises.
<b><i>Domestic Tourism</i></b>	The travel of domestic visitors is called domestic tourism. It comprises the activities of a resident visitor within the country of reference either as part of a domestic tourism trip or part of an outbound tourism trip.
<b><i>Domestic Tourism Consumption</i></b>	Consists of the tourism consumption by resident visitors on tourism related products within the economy. It is the sum of household tourism consumption and business and government tourism consumption.
<b><i>Domestic Travel</i></b>	Travel within a country by residents is called domestic travel.
<b><i>Domestic Travellers</i></b>	Those who undertake domestic travel are domestic travellers.

***Domestic Trip***

A domestic trip is one with a main destination within the country of residence of the visitor.

***Domestic Visitor***

A domestic traveller qualifies as a domestic visitor if: (a) he/she is on a tourism trip and (b) he/she is a resident travelling in the country of reference.

Domestic visitors are those who travel within the country to a place other than their usual place of residence and stay at hotels or other accommodation establishments run on commercial basis or in dharamshalas/sarais/musafirkhanas/ agrashalas/choultries, etc for a duration of not less than 24 hours or one night and for not more than 12 months at a time.

***Durable Consumer Goods***

Durable goods are goods that “may be used repeatedly or continuously over a period of a year or more, assuming a normal or average rate of physical usage”. When acquired by producers, these are considered to be capital goods used for production processes as is the case of vehicles, computers, etc. When acquired by households, they are considered to be consumer durable goods.

***Economic Activity***

Any activity resulting in production of goods and services that add value to national product is considered as an economic activity. Such activities include production of all goods and services for market (market activities), i.e. Production for pay or profit, and, among the non-market activities, the production of goods and household services with paid domestic employees and owner occupied dwellings for own consumption and own account production of fixed assets.

***Employed Persons***

Employed (or worker) persons are those who are engaged in any economic activity or who, despite their attachment to economic activity, abstain from work for reason of illness, injury or other physical disability, bad weather, festivals, social or religious functions or other contingencies necessitating temporary absence from work.

***Employed Persons***

Number of persons usually employed in the principal



	and subsidiary statuses.
<b><i>Employed As Per Principal Activity Status</i></b>	Those in labour force pursuing some economic activity for major time during the reference period of 365 days
<b><i>Employed As Per Subsidiary Activity Status</i></b>	Those in labour force pursuing some economic activity for a relatively shorter time (minor time) during the reference period of 365 days
<b><i>Enterprise</i></b>	An enterprise is an institutional unit in its capacity as a producer of goods and services; an enterprise may be a corporation, a quasi-corporation, a non-profit institution, or an unincorporated enterprise.
<b><i>Establishment</i></b>	An establishment is an enterprise or part of an enterprise that is situated in a single location and in which only a single (non-ancillary) productive activity is carried out or in which the principal productive activity accounts for most of the value added.
<b><i>Exports of Goods</i></b>	Exports of goods consist of exports of the following items from residents to non-residents: generally with a change of ownership being involved: general merchandise, goods for processing, goods procured in domestic ports by non-resident carriers and non-monetary gold.
<b><i>Exports of Services</i></b>	Exports of services consist of exports of the following services provided by residents to non-residents: transportation; travel; communications; construction; insurance; financial; computer and information; royalties and licence fees; other business services; personal, cultural, and recreational services; and government services n.i.e.
<b><i>Excursionist</i></b>	Same day visitors are called excursionists.
<b><i>Final Demand</i></b>	Transactions that involve purchases of produced goods and services for final uses are presented in final demand table. The “final” use for a good or service is that it is not used up entirely in the reference year as an intermediate input in the production of some other good or service. Transactions for goods and services that are completely used to produce other goods and services are shown in the intermediate input (or use)

	table of the accounts.
<b><i>Final Output</i></b>	This is that part of total output of each industry sold either for final consumption by households, general government or for investment (including additions to inventories) and for export. In short, it represents total output sold to final buyers. For the whole economy, total final output is equal to the value of goods and services (both domestically produced and imported) available for consumption, investment and export.
<b><i>Final Consumption</i></b>	Final consumption consists of goods and services used up by individual households or the community to satisfy their individual or collective needs or wants.
<b><i>Final Consumption Expenditure of Government</i></b>	Government final consumption expenditure consists of expenditure, including imputed expenditure, incurred by general government on both individual consumption goods and services and collective consumption services.
<b><i>Final Consumption Expenditure of Households</i></b>	Household final consumption expenditure consists of the expenditure, including imputed expenditure, incurred by resident households on individual consumption goods and services, including those sold at prices that are not economically significant.
<b><i>Final Consumption Expenditure of Npishs</i></b>	Final consumption expenditure of npishs (non-profit institutions serving households) consists of the expenditure, including imputed expenditure, incurred by resident npishs on individual consumption goods and services.
<b><i>Fob Price</i></b>	The FOB price (free on board price) of exports and imports of goods is the market value of the goods at the point of uniform valuation, (the customs frontier of the economy from which they are exported); it is equal to the CIF price less the costs of transportation and insurance charges, between the customs frontier of the exporting (importing) country and that of the importing (exporting) country.
<b><i>General Government</i></b>	The general government sector consists of the totality of institutional units which, in addition to fulfilling their political responsibilities and their role of economic regulation, produce principally non-market

**GDP**

services (possibly goods) for individual or collective consumption and redistribute income and wealth.

Is the total market value of goods and services produced in the economy within a given period after deducting the cost of goods and services used up in the process of production but before deducting allowances for the consumption of fixed capital. Thus gross domestic product, as here defined, is 'at market prices'.

**Gross**

The term "gross" is a common means of referring to values before deducting consumption of fixed capital (generally used as in "gross capital stock" or "gross domestic product").

**Gross Domestic Product - Expenditure Based**

Expenditure-based gross domestic product is total final expenditures at purchasers' prices (including the FOB value of exports of goods and services), less the FOB value of imports of goods and services.

**Gross Domestic Product - Income Based**

Income-based gross domestic product is compensation of employees, plus taxes less subsidies on production and imports, plus gross mixed income, plus gross operating surplus.

**Gross Domestic Product - Output Based**

Output-based gross domestic product is the sum of the gross values added of all resident producers at basic prices, plus all taxes less subsidies on products. Output-based GDP is the sum of the gross values added of all resident producers at producers' prices, plus taxes less subsidies on imports, plus all non-deductible VAT (or similar taxes).

**Gross Fixed Capital Formation**

Gross fixed capital formation is measured by the total value of a producer's acquisitions, less disposals, of fixed assets during the accounting period plus certain additions to the value of non-produced assets (such as subsoil assets or major improvements in the quantity, quality or productivity of land) realised by the productive activity of institutional units.

**Gross Margin**

The gross margin of a provider of reservation services is the difference between the value at which the intermediated service is sold and the value accrued to the provider of reservation services for this

	intermediated service.
<b><i>Gross Value Added</i></b>	Gross value added is the value of output less the value of intermediate consumption; it is a measure of the contribution to GDP made by an individual producer, industry or sector; gross value added is the source from which the primary incomes of the SNA are generated and is therefore carried forward into the primary distribution of income account.
<b><i>Gross Value Added At Basic Prices</i></b>	Gross value added at basic prices is output valued at basic prices less intermediate consumption valued at purchasers' prices.
<b><i>Gross Value Added of The Tourism Industries (GVATI)</i></b>	Gross value added of the tourism industries is the total gross value added of all establishments belonging to tourism industries, regardless of whether all their output is provided to visitors and of the degree of specialization of their production process.
<b><i>Household Tourism Consumption</i></b>	Consists of the tourism consumption by resident households on tourism related products within economy.
<b><i>Imports of Goods</i></b>	Imports of goods consist of imports of the following items from non-residents to residents, generally with a change of ownership being involved: general merchandise, goods for processing, goods procured in foreign ports by domestic carriers, and non-monetary gold.
<b><i>Imports of Services</i></b>	Imports of services consist of the following services purchased by residents from non-residents: transportation; travel; communications; construction; insurance; financial; computer and information; royalties and licence fees; other business services; personal, cultural, and recreational services; and government services n.i.e.
<b><i>Imports of Goods And Services</i></b>	Imports of goods and services consist of purchases, barter, or receipts of gifts or grants, of goods and services by residents from non-residents; the treatment of exports and imports in the SNA is generally identical with that in the balance of payments accounts as described in the Balance of

***Imputed Tourism Consumption***

Payments Manual.

Consists of imputations made for the consumption by visitors of certain goods and services for which they do not make a payment. Imputation is confined to a small number of cases where a reasonably satisfactory basis for the valuation of the implied transaction is available, and where their inclusion is consistent with the production boundary in the core national accounts.

***Inbound Travel***

Travel to a country by non-residents is called inbound travel.

***Inbound Trip***

An inbound trip is one with a main destination outside the country of residence of the visitor.

***Inbound Tourism***

The travel of inbound visitors is called inbound tourism. It comprises the activities of a non-resident visitor within the country of reference on an inbound tourism trip.

***Inbound Tourism Consumption***

Inbound tourism consumption is the tourism consumption of a non-resident visitor within the economy of reference.

***Input-Output Model***

It provides a detailed breakdown of economic activity among business industries and a detailed breakdown of their inputs and outputs by commodity associated with some arbitrarily fixed exogenous demand. It also provides supply requirements from other sources such as imports and government production of goods and services. The input-output model is a structural model dealing primarily with resource allocation in the economy corresponding to an exogenously given demand.

***Input-Output Tables***

Input-output tables are derived from Supply and Use Tables, which show the process of flows of goods and services through the economic system between producers and consumers. The transactors involved in the production process are individuals (persons or households), establishments (production units of businesses and governments), non-business entities such as non-profit institutions, and governments. An input-output table presents a detailed analysis of the

	<p>process of production and the use of goods and services (products) and the income generated in that production.; they can be either in the form of (a) supply and use tables or (b) symmetric input-output tables. These tables include the Imports Use and Domestic Use matrices, industry by industry and product by product matrices plus the Leontief inverse, multipliers and other analyses of their structure.</p>
<b><i>Intermediate Consumption</i></b>	<p>Intermediate consumption consists of the value of the goods and services consumed as inputs by a process of production, excluding fixed assets whose consumption is recorded as consumption of fixed capital; the goods or services may be either transformed or used up by the production process.</p>
<b><i>Intermediate Output</i></b>	<p>That part of the total output of each industry consumed by other industries in the production process.</p>
<b><i>Internal Tourism</i></b>	<p>Comprises domestic tourism and inbound tourism, that is, the activities of resident and non-resident visitors within the country of reference as part of domestic or international tourism trips.</p>
<b><i>Internal Tourism Consumption</i></b>	<p>Internal tourism consumption is the tourism consumption of both resident and non-resident visitors within the economy of reference. It is the sum of domestic tourism consumption and inbound tourism consumption.</p>
<b><i>International Tourism</i></b>	<p>Comprises inbound tourism and outbound tourism, that is, the activities of resident visitors outside the country of reference, either as part of domestic or outbound tourism trips and the activities of non-resident visitors within the country of reference on inbound tourism trips.</p>
<b><i>International Tourism Consumption</i></b>	<p>Also referred to as internal tourism consumption by international visitors. Consists of the tourism consumption within the economy by non-residents on tourism related products.</p>
<b><i>International Travellers</i></b>	<p>Those who undertake international travel are considered as international travellers.</p>

***International Visitor***

An international traveller qualifies as an international visitor with respect to the country of reference if: (a) he/she is on a tourism trip and (b) he/she is a non-resident travelling in the country of reference or a resident travelling outside of it.

***ISIC***

ISIC is the United Nations International Standard Industrial Classification of All Economic Activities; the third revision of ISIC is used in the 1993 SNA.

***Leontief Inverse (Input-Output) Table***

The columns of the Leontief inverse (input-output) table show the input requirements, both direct and indirect, on all other producers, generated by one unit of output

***Main Destination***

The main destination of a tourism trip is defined as the place visited that is central to the decision to take the trip.

***Main Purpose of A Trip***

The main purpose of a trip is defined as the purpose in the absence of which the trip would not have taken place. The main purpose of a trip is one of the criteria used to determine whether the trip qualifies as a tourism trip and the traveller qualifies as a visitor. If the main purpose is to be employed and earn income (compensation for the labour input provided), then the trip cannot be a tourism trip and the individual taking the trip cannot be considered as a visitor (even though it is outside his/her usual environment and for less than 12 months), but as an “other traveller”.

***Margin***

This is the difference between the resale price of a good and the cost to the retailer or wholesaler of the good sold. A transport margin consists of the transport charges invoiced separately by the producer in the delivery of a good.

***Margin (Trade)***

A trade margin is the difference between the actual or imputed price realised on a good purchased for resale (either wholesale or retail) and the price that would have to be paid by the distributor to replace the good at the time it is sold or otherwise disposed of.

***Margin (Transport)***

A transport margin consists of those transport charges paid separately by the purchaser in taking delivery of



***Multipliers***

the goods at the required time and place.

An I-O multiplier is a quantitative measure created by a particular I-O based economic model. It is an analytical answer to a hypothetical question about how a certain expenditure is expected to impact the economy. The multipliers allow users to make estimates of the whole economy impacts of small changes in the economy.

***National Tourism***

Comprises domestic tourism and outbound tourism, that is, the activities of resident visitors within and outside the country of reference, either as part of domestic or outbound tourism trips.

***National Tourism Consumption***

National tourism consumption is the tourism consumption of resident visitors, within and outside the economy of reference. It is the sum of domestic tourism consumption and outbound tourism consumption.

***Net Taxes on Products***

Also referred to as taxes less subsidies on products. A tax or subsidy on a product is payable per unit of a good or service. The tax or subsidy may be a specific amount of money per unit of quantity of a good or service (quantity being measured either in terms of discrete units or continuous physical variables such as volume, weight, strength, distance, time, etc.), or it may be calculated ad valorem as a specified percentage of the price per unit or value of the goods or services transacted. A tax or subsidy on a product usually becomes payable when the product is produced, sold or imported, but it may also become payable in other circumstances, such as when a good is exported, leased, transferred, delivered, or used for own consumption or own capital formation. See also Other taxes on production and Taxes less subsidies on production and imports.

***Other Taxes on Production***

Consist of all taxes that enterprises incur as a result of engaging in production, except taxes on products. Other taxes on production include: taxes related to the payroll or workforce numbers excluding compulsory social security contributions paid by employers and any taxes paid by the employees themselves out of their wages or salaries; recurrent taxes on land,



***Outbound Tourism***

buildings or other structures; some business and professional licences where no service is provided by the Government in return; taxes on the use of fixed assets or other activities; stamp duties; taxes on pollution; and taxes on international transactions. See also Taxes less subsidies on production and imports.

The travel of outbound visitors is called outbound tourism. It comprises the activities of a resident visitor outside the country of reference, either as part of an outbound tourism trip or as part of a domestic tourism trip.

***Outbound Tourism Consumption***

Outbound tourism consumption is the tourism consumption of a resident visitor outside the economy of reference. Also referred to as tourism imports. Consists of the tourism consumption by resident visitors outside of the economy while on an international trip.

***Outbound Trip***

An outbound trip is one with a main destination outside the country of residence of the visitor.

***Outbound Travel***

Travel outside a country by residents is called outbound travel.

***Output***

Output consists of those goods or services that are produced within an establishment that become available for use outside that establishment, plus any goods and services produced for own final use.

***Output Multiplier***

Output multiplier for a particular industry is defined to be the total of all outputs from each domestic industry required in order to produce one additional unit of output: that is, the column sums ( $\Sigma_i$ ) from Leontief inverse matrix ( $L_{ij}$ ).

***Principal Activity***

The principal activity of a producer is the activity whose value added exceeds that of any other activity carried out within the same unit. The output of the principal activity must consist of goods or services that are capable of being delivered to other units even though they may be used for own consumption or own capital formation.

***Principal Usual Activity***

The activity status of a person during the reference

***Status of Persons***

period of 365 days preceding the date of survey, which is determined on the basis of a person spending relatively longer time (i.e. Major time criterion). Based on this a person is categorised as those (a) belonging to labour force and (b) not belonging to the labour force ('neither working nor available for work'). Within the labour force, the criteria of (i) 'working' and (ii) 'not working but seeking and/or available for work' is again based on the major time criterion. The principal status workers are from (i) whereas the subsidiary status workers can be from either or both of (i) and (ii).

***Principal Product***

The principal product of an industry is the characteristic or main product produced by the relevant industry. Producing units are classified to industries according to which products they make. If they produce more than one product, they are classified according to whichever accounts for the greatest part of their GVA.

***Production***

Production is an activity, carried out under the responsibility, control and management of an institutional unit that uses inputs of labour, capital and goods and services to produce outputs of other goods and services.

***Production Account***

The production account records the activity of producing goods and services as defined within the SNA; its balancing item, gross value added, is a measure of the contribution to GDP made by an individual producer, industry or sector.

***Products***

Products, also called "goods and services", are the result of production; they are exchanged and used for various purposes: as inputs in the production of other goods and services, as final consumption or for investment.

***Purchaser's Price***

The purchaser's price is the amount paid by the purchaser, excluding any deductible VAT or similar deductible tax, in order to take delivery of a unit of a good or service at the time and place required by the purchaser; the purchaser's price of a good includes any transport charges paid separately by the purchaser to

***Same Day Visitor***

take delivery at the required time and place.

A visitor (domestic, inbound or outbound) is classified as a same-day visitor (or excursionist) if his/her trip does not include an overnight stay.

***Social Transfers in Kind***

Social transfers in kind consist of social security and social assistance benefits in kind together with goods and services provided to individual household outside any social insurance scheme by non-market producers owned by government units or non-profit institutions (NPIS).

***Subsidies***

Subsidies are current unrequited payments that government units, including non-resident government units, make to enterprises on the basis of the levels of their production activities or the quantities or values of the goods or services which they produce, sell or import. They include the financing of deficits on public trading services deliberately run at a loss. There are two types, see subsidies on production and subsidies on products.

***Subsidy on a Product***

A subsidy on a product is a subsidy payable per unit of a good or service produced, either as a specific amount of money per unit of quantity of a good or service or as a specified percentage of the price per unit; it may also be calculated as the difference between a specified target price and the market price actually paid by a buyer. These are subsidies based on a quantity or value of goods or services sold.

***Supply***

The supply of a good or service is the sum of the values of its domestic output (from all sectors), plus imports, c.i.f. When measured at basic prices. At purchasers' prices, trade and transport margins and net taxes on products are also added.

***Supply Table***

The main body of the Supply Table shows estimates of domestic industries' output by type of product at basic prices. The columns represent the supplying industries and the rows represent the products supplied. Additional columns covering imports of goods and services, distributors' trading margins and taxes (less subsidies) on products are added to show supply of all

***Supply and Use Tables***

goods and services at purchasers' prices.

Supply and use tables are in the form of matrices that record how supplies of different kinds of goods and services originate from domestic industries and imports and how those supplies are allocated between various intermediate or final uses, including exports.

***Tax on a Product***

A tax on a product is a tax that is payable per unit of some good or service, either as a specified amount of money per unit of quantity or as a specified percentage of the price per unit or value of the good or service transacted.

***Taxes***

Taxes are compulsory, unrequited payments, in cash or in kind, made by institutional units to government units; they are described as unrequited because the government provides nothing in return to the individual unit making the payment, although governments may use the funds raised in taxes to provide goods or services to other units, either individually or collectively, or to the community as a whole.

***Taxes on Production and Imports***

Taxes on production and imports consist of taxes payable on goods and services when they are produced, delivered, sold, transferred or otherwise disposed of by their producers plus taxes and duties on imports that become payable when goods enter the economic territory by crossing the frontier or when services are delivered to resident units by non-resident units; they also include other taxes on production, which consist mainly of taxes on the ownership or use of land, buildings or other assets used in production or on the labour employed, or compensation of employees paid.

***Taxes on Products***

Taxes on products, excluding VAT, import and export taxes, consist of taxes on goods and services that become payable as a result of the production, sale, transfer, leasing or delivery of those goods or services, or as a result of their use for own consumption or own capital formation. These taxes are defined as product specific taxes, for example: value added tax, excise duties, air passenger tax, insurance premium tax and import duties, and are based on the volume or value of

	production sold.
<b><i>Total Economy</i></b>	The total economy consists of all the institutional units which are resident in the economic territory of a country.
<b><i>Total Final Expenditure</i></b>	This is the sum total of final consumption, gross capital formation and exports of goods and services. Total final expenditure is the same as total demand by final buyers and is equal to total final output.
<b><i>Total Intermediate Consumption</i></b>	The total intermediate consumption of each industry is the industry's total purchases of the outputs of other industries as well as purchases of imports of goods and services and intra-industry purchases for use in its production process. This is adjusted for the change in inventories of materials and fuels and excludes primary inputs.
<b><i>Total Tourism Internal Demand</i></b>	Total tourism internal demand, is the sum of internal tourism consumption, tourism gross fixed capital formation and tourism collective consumption. It does not include outbound tourism consumption.
<b><i>Total Output</i></b>	The total output of an industry is the aggregate value of the goods and services together with the work-in-progress produced by the industry. It is equal to the value of the industry's sales plus any increase (and less any decrease) in the value of its inventories of finished products and work-in progress. Output is thus measured after deducting holding gains. The outputs of the distribution and service trades industries are measured on a 'gross margin' basis.
<b><i>Taxes Less Subsidies on Production and Imports</i></b>	Defined as 'taxes on products' plus 'other taxes on production' less 'subsidies on products' less 'other subsidies on production'. The taxes do not include any taxes on the profits or other income received by an enterprise. They are payable irrespective of the profitability of the production process. They may be payable on the land, fixed assets or labour employed in the production process, or on certain activities or transactions.

***Tourism***

Comprises the activities of visitors.

***Tourism Characteristic Industries***

Are those industries that would either cease to exist in their present form, producing their present product(s), or would be significantly affected if tourism were to cease. Under the international TSA standards, core lists of tourism characteristic industries, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. Some countries use the criteria of at least 25 per cent of an industry's output must be consumed by visitors to be a country-specific tourism characteristic industry.

***Tourism Characteristic Products***

These are defined in the international TSA standards as those products which would cease to exist in meaningful quantity, or for which sales would be significantly reduced, in the absence of tourism. Under the international TSA standards, core lists of tourism characteristic products, based on the significance of their link to tourism in the worldwide context, are recommended for implementation to facilitate international comparison. It is also recommended in the international TSA standards that country-specific tourism characteristic products are identified.

***Tourism Connected Industries***

Are those, other than tourism characteristic industries, for which a tourism related

Product is directly identifiable (primary) to, and where the products are consumed by visitors in volumes which are significant for the visitor and/or the producer. All other industries are classified as non-tourism industries, though some of their products may be consumed by visitors and are included in the calculation of direct tourism gross value added and direct tourism GDP.

***Tourism Connected Products***

Are those that are consumed by visitors but are not considered as tourism characteristic products. All other products in the supply and use table not consumed by visitors are classified as 'all other goods and services' in the TSA.

***Tourism Consumption***

Tourism consumption has the same formal definition as tourism expenditure. Nevertheless, the concept of

	<p>tourism consumption used in the TSA goes beyond that of tourism expenditure. Actually, besides “the amount paid for the acquisition of consumption goods and services, as well as valuables for own use or to give away, for and during tourism trips” that corresponds to monetary transactions (the focus of tourism expenditure), it also includes services associated with vacation accommodation on own account, tourism social transfers in kind, and other imputed consumption. These transactions need to be estimated using sources different from information collected directly from the visitors such as reports on home exchanges, estimations of rents associated to vacation homes, calculations of FISIM, etc.</p>
<b><i>Tourism Demand</i></b>	<p>Expenditure made by, or on behalf of, the visitor before, during and after the trip and which expenditure is related to that trip and which trip is undertaken outside the usual environment of the visitor.</p>
<b><i>Tourism Direct Gross Domestic Product (TDGDP)</i></b>	<p>Tourism direct gross domestic product is the sum of the part of gross value added (at basic prices) generated by all industries in response to internal tourism consumption plus the amount of net taxes on products and imports included within the value of this expenditure at purchasers’ prices.</p>
<b><i>Tourism Direct Gross Value Added (TDGVA)</i></b>	<p>Tourism direct gross value added is the part of gross value added generated by tourism industries and other industries of the economy that serve directly visitors in response to internal tourism consumption.</p>
<b><i>Tourism Expenditure</i></b>	<p>The amount paid for the acquisition of consumption goods and services as well as valuables, for own use or to give away, for and during tourism trips. It includes expenditures by visitors themselves as well as expenses that are paid for or reimbursed by others.</p>
<b><i>Tourism Exports</i></b>	<p>Tourism exports are domestically produced goods and services consumed by international visitors to the country.</p>
<b><i>Tourism Industry Ratio</i></b>	<p>This is the proportion of the total value added of an industry which is related to tourism.</p>



<b><i>Total Tourism Internal Demand</i></b>	Computed by adding tourism internal consumption (domestic and inbound tourism consumption) with other components of internal demand, such as tourism collective consumption and tourism gross fixed capital formation.
<b><i>Tourism Imports</i></b>	Tourism imports are consumption of overseas produced goods and services by residents on overseas trips.
<b><i>Tourism Net Taxes on Products</i></b>	Consists of taxes paid less subsidies received on tourism related products which is attributable to productive activity of tourism related industries that are in a direct relationship with visitors. In the case of goods purchased by visitors, only the net taxes attributable to the value of retail trade services on those goods will be included.
<b><i>Tourism Product Ratio</i></b>	This is the proportion of the total supply of a product which is consumed by visitors.
<b><i>Tourism Ratio</i></b>	For each variable of supply in the TSA, the tourism ratio is the ratio between the total value of tourism share and total value of the corresponding variable in the TSA expressed in percentage form.
<b><i>Tourism Share</i></b>	Tourism share is the share of the corresponding fraction of internal tourism consumption to each component of supply. For each industry, the tourism share of output (in value), is the sum of the tourism share corresponding to each product component of its output.
<b><i>Tourism Single Purpose Consumer Durable Goods</i></b>	Tourism single-purpose consumer durables are a specific category of consumer durable goods that include durable goods that are used exclusively, or almost exclusively by individuals while on tourism trips.
<b><i>Tourism Satellite Account</i></b>	Tourism Satellite Account consists in analyzing in detail all the aspects of demand for goods and services which might be associated with tourism, in establishing the actual interface with the supply of such goods and services within the economy of reference, or outside and in describing how this supply



	(from domestic or imported origin) interacts with other economic activities, using the SUT as a reference.
<b><i>Tourist</i></b>	A visitor (domestic, inbound or outbound) is classified as a tourist (or overnight visitor) if his/her trip includes an overnight stay.
<b><i>Tourism Trip</i></b>	Trips which are undertaken by visitors.
<b><i>Tourism Visit</i></b>	The term tourism visit refers to a stay in a place visited during a tourism trip. However, while discussing the different forms of tourism (domestic, inbound and outbound), the term visitor is often used instead of tourism visit or tourism trip.
<b><i>Travel</i></b>	Travel refers to the activity of travellers.
<b><i>Transportation in Balance of Payments Statistics</i></b>	Transportation (bop item 205) covers services provided by all modes of transportation - sea, air, and other, which includes space, rail, road, inland waterway and pipeline - that are performed by residents of one economy for those of another. The different types of services offered include transport of passengers, transport of freight and other supporting and auxiliary services (e.g., storage and warehousing).
<b><i>Travel in Balance of Payments Statistics</i></b>	<p>The item Travel (bop item 236) consists of goods and services which are acquired by residents who stay abroad or foreign travellers on the national territory for less than one year.</p> <p>Note that international transportation costs of the traveller to destination are recorded under the heading "transportation", but all movements within the country, including cruises, are entered under "travel".</p>
<b><i>Traveller</i></b>	A traveller is someone who moves between different geographic locations for any purpose and any duration. Travel within a country by residents is called domestic travel. Travel to a country by non-residents is called inbound travel, whereas travel outside a country by residents is called outbound travel. Those who undertake travel, be it domestic, inbound or outbound, will be called domestic, inbound or outbound travellers, respectively.

***Trip***

A trip refers to the travel by a person from the time of departure from his usual residence until he/she returns to the same place: it thus refers to a round trip. A trip is made up of visits to different places. An inbound trip will correspond to the travel between arriving in a country and leaving, whereas a domestic trip or an outbound trip will correspond to the travel between leaving the place of residence and returning. A domestic trip has a main destination in the country of residence of the traveller, while an outbound trip has a main destination outside this country.

***TSA Aggregates***

The compilation of the following aggregates, which represent a set of relevant indicators of the size of tourism in an economy is recommended:

- Internal tourism expenditure;
- Internal tourism consumption;
- Gross value added of the tourism industries (GVATI);
- Tourism direct gross value added (TDGVA);
- Tourism direct gross domestic product (TDGDP)

***Uses***

The term refers to transactions in the current accounts that reduce the amount of economic value of a unit or sector, for example, wages and salaries are a type of use for the unit or sector that must pay them. By convention, uses are on the left-hand side of SNA accounts.

***Usual Environment***

The geographical area (though not necessarily a contiguous one) within which an individual conducts his/her regular life routines. This is made up of one or more areas in which a person undertakes their regular activities such as their residence, place of work, place of study and other places frequently visited. The usual environment criteria has two dimensions – frequency (places that are visited on a routine basis) and distance (locations close from home for overnight trips).

***Usual Expenditures***

In addition to the usual expenditures made by visitors while travelling (or preparing to travel) on commodities such as transport, meals or accommodation, these expenditures cover, inter alia,

**Valuables**

expenses incurred for the purposes of travel, such as suitcases which may be purchased some time before the planned trip. On the other hand, the measure excludes expenditure on capital equipment or other capital acquisition that may be made by a businessman while on a trip (even if that were the reason for the trip). If the trip were paid for by a non-visitor (such as parents paying for their child to visit them from abroad), it would be included because the expenditure was made on behalf of the visitor.

Valuables are produced assets that are not used primarily for production or consumption, that are expected to appreciate or at least not to decline in real value, that do not deteriorate over time under normal conditions and that are acquired and held primarily as stores of value.

**Visitor**

A visitor is a traveller taking a trip to a main destination outside his/her usual environment for less than a year and for any main purpose (business, leisure or other personal purpose) other than to be employed by a resident entity in the country or place visited.



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