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KERALA TOURISM STATISTICS - 2013



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Prepared by
Research and Statistics Division Department of Tourism
www.keralatourism.org



**Government of Kerala
Department of Tourism**

**Kerala Tourism
Statistics – 2013**

**RESEARCH & STATISTICS DIVISION
DIRECTORATE OF TOURISM
Park View, Thiruvananthapuram**



FOREWORD

The Research and statistical wing of Tourism department has come up with the Kerala-Tourism statistics 2013.

What makes a destination dynamic is the number and the diversity in profile of the tourists it brings in. What makes a destination relevant to the nation is the volume of revenue generated which has positive impact on the society and the economy. Realizing this, the department has always made earnest efforts to plan its products, destinations, infrastructure and activities the way they appeal the visitors the best. A constant watch on the numbers has helped us to plan better.

A lot of effort has gone into collection, consolidation and presentation of this data in the most relevant form for the benefit of the department and the industry. We sincerely hope that these figures would be beneficial to all those who are related to the tourism in Kerala.

A handwritten signature in black ink, consisting of stylized initials and a surname, written over a horizontal line.

P.I. SHEIK PAREETH IAS

*Director
Department of Tourism*



A.P.ANILKUMAR

MINISTER FOR WELFARE OF SCHEDULED CASTES,
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THIRUVANANTHAPURAM



MESSAGE

It is with immense pleasure that the Department of Tourism, Government of Kerala is launching Kerala-Tourism statistics 2013.

Kerala with its lush green landscape and abundance of diverse destinations has always enchanted domestic as well as international tourists. The beauty of the land, along with local entrepreneurship and warmth of the people have taken Kerala tourism to the heights we see today. The department has been dynamic and pro active by reinventing new destinations, tourism products and most recently the concept of 'Responsible tourism'. The numerous accolades won by Kerala Tourism over years underline this.

The growth of a destination is measured by means of the tourist inflow as well as the revenue generated directly or indirectly through this. It is in this context that the department realized the importance of research and statistics pertaining to the tourism for better planning of the activities undertaken by Kerala tourism.

I extend my heartfelt wishes and support to this publication.

A.P.ANILKUMAR



G. KAMALA VARADHANARAO, IAS
SECRETARY TO GOVERNMENT

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MESSAGE

Department of tourism, Government of Kerala is bringing out Kerala-Tourism arrival statistics 2013.

The department has always depended on the number of travelers, profile of travelers and feedback from the travelers to plan the tourism infrastructure in the state and promotion of its destinations. The primary data from the field has always been the best pointer of the effectiveness of such planning. In turn, the data helps us to direct the succeeding year's activities in the best possible track.

The research and statistics section of the department of tourism has taken every possible step to collect, collate and analyse this data to present in the easiest and transparent way. This will not only help the department, but also the investors, students and academicians in their relevant field.

KAMALA VARADHANARAO, IAS

CONTENTS

CHAPTER 1

IMPORTANT STATISTICS ON KERALA TOURISM

Important Statistics on Kerala Tourism

2014 Highlights

CHAPTER 2

KERALA TOURISM

2.1 Kerala Tourism

2.2 Tourist Statistics – 2013

2.3. Foreign tourist arrival in Kerala

2.4. Main Source Market of Foreign Tourists

2.5. District –wise Distribution of Foreign Tourists visits

2.6. Region-wise and district wise foreign tourist visits

2.7. Seasonality in Foreign tourists.

2.8. District wise and month wise foreign tourists visits in 2013.

2.9. Quarterly comparison of foreign tourists arrivals

2.10. Destination wise Foreign tourist arrivals in 2013

2.11. Domestic tourist visits in Kerala

2.12. Main Source Market of Domestic Tourists

2.13. District –wise Distribution of Domestic Tourists visits

2.14. Seasonality in Domestic tourists

2.15. Quarterly comparison of Domestic tourists arrivals

2.16. District wise and Month-wise Statistics of domestic tourists

2.17. Destination wise Domestic tourist arrivals in 2013

2.18. Earnings from tourism

CHAPTER 3

INBOUND TOURISM-FOREIGN TOURIST ARRIVALS IN INDIA

3.1. Inbound Tourism - Tourist Arrivals in India

3.2 Foreign tourist arrivals in India

3.3. Mode of travel

3.4. Port of entry

3.5. Classification according to age-group

3.6. Purpose of visit

3.7. Nationality-wise arrivals and top 15 markets for India

CHAPTER 4

WORLD TOURISM SCENARIO AND INDIA'S POSITION IN WORLD

4.1 World Tourist Traffic

4.2 International Tourism receipts

CHAPTER 5

OUTBOUND TOURISM- INDIAN NATIONALS GOING ABROAD

5.1. Outbound Tourism- Indian nationals

Going abroad

CHAPTER 6

DOMESTIC TOURISM IN INDIA

CHAPTER 7

APPROVED HOTELS

7.1 Availability of accommodation facility in Classified Hotels in Kerala

7.2 Approved Hotels in India

7.3 Accommodation units in Kerala

CHAPTER 8

TRAVEL TRADE

8.1 Travel Agents, Tour Operators and Tourist Transport Operators

CHAPTER 9

HUMAN RESOURCE DEVELOPMENT

9.1. KITTS

9.2. IHMCT

9.3. SIHM

CHAPTER 10

PLAN OUTLAYS

Annual Plan Outlays

CHAPTER 11

SURVEYS AND STUDIES

11.1. Continuous Tourist Survey for a period of three years -highlights

CHAPTER 12

FINANCIAL ASSISTANCE PROVIDED BY DEPARTMENT OF TOURISM

Financial assistance provided by Department of Tourism during 2013 –2014

Appendix

Annexure

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SOURCE OF DATA

The Statistics contained in this book are compiled on the basis of monthly data collected by the department from accommodation units all over Kerala , India Tourism Statistics and from various studies conducted by Kerala Tourism.

CHAPTER 1



Important Statistics on Kerala Tourism

IMPORTANT STATISTICS ON KERALA TOURISM, 2013

1.1 KERALA AT A GLANCE

Kerala, the greenest state in India located at the southern tip of Indian sub-continent, is blessed with excellent tropical weather and is popularly known as the ‘Gods Own Country’ in the tourism circles. This lush green strip of land lying between the Arabian Sea and the Western Ghats has an area of about 38,863sq.km and is inhabited by about 33.39 million people as per Census – 2011. Kerala has always been leading among the states in different human development indicators like highest literacy, life expectancy and lowest child mortality. Some of the basic facts about Kerala are summarized below;

1.1 Geographical Features

Location: The State lies between 8° 18 ‘and 12° 48’ north latitude and between 74° 52’ and 77° 48’ of longitude.

Capital	:	Thiruvananthapuram
Area	:	38,863 sq km
Water bodied	:	945.3 sq km
Forest Area	:	9400 sq km
Time	:	GMT + 5:30
Districts	:	14 Nos.
Taluks	:	63 Nos.
CD Blocks	:	152
Villages	:	1453
Panchayaths	:	978
Corporations	:	5 Nos.
Municipalities	:	60 Nos.
Cultivated Area	:	20.89 lakh ha
Currency	:	Indian Rupee
Climate	:	Tropical

Wetlands	:	0.39 lakh ha
Summer	:	February – May
Monsoon	:	June – September
Winter	:	October – January
Highest Peak	:	Anamudi
Longest River	:	Periyar
Average Annual Rainfall	:	2900 mm

2. Population Parameters

Total Population (Census-2011)	:	33.39 million
Male Population	:	16.021 million
Female Population	:	17.366 million
Density of population	:	859 per sq. km
Share of Kerala in the total Population	:	2.76 per cent
Sex Ratio	:	1084 women for 1000 men
Literacy Rate	:	93.91 per cent
Male Literacy Rate	:	96.02 per cent
Female Literacy Rate	:	91.96 per cent
Languages Spoken	:	Malayalam, Hindi and English

1.2 KERALA TOURIST STATISTICS- 2013 – A NUT SHELL

Kerala is a leader in India when it comes to the destination management, tourism promotion as well as tourist arrivals. The statistics are as shown below-

Foreign

No. of Foreign Tourists in 2013	-	858143
No. of Foreign Tourists in 2012	-	7, 93,696
% Variation over Previous year	-	8.12 %
Per Day Expenditure 2013	-	Rs.4496/-
Per Day Expenditure 2012	-	Rs.3600/-

% Variation over Previous year	-	24.89 %
Average duration of Stay 2013	-	18days
Average duration of Stay 2012	-	16 days
% Variation over Previous year	-	12.5%
Foreign Exchange Earnings 2013	-	Rs. 5560.77 crores
Foreign Exchange Earnings 2012	-	Rs. 4571.69crores
% Variation over Previous year	-	21.63%
Domestic		
No. of Domestic Tourists in 2013	-	108, 57,811
No. of Domestic Tourists in 2012	-	100, 76,854
% Variation over Previous year	-	6.53 %
Per Day Expenditure 2013	-	Rs.2015/-
Per Day Expenditure 2012	-	Rs.1800/-
% Variation over Previous year	-	11.94 %
Average duration of Stay 2013	-	8 days
Average duration of Stay 2012	-	6 days
% Variation over Previous year	-	33.3%
Earnings from Domestic tourists 2013	-	Rs. 11,726.44 crores
Earnings from Domestic tourists 2012	-	Rs. 10,883crores
% Variation over Previous year	-	7.75 %
Total Earnings (Direct) 2013	-	Rs. 17,287.21 crores
Total Earnings (Direct) 2012	-	Rs. 15,404.69 crores
% Variation over Previous year	-	12.22 %
Total revenue generated 2013		
(direct and indirect)	-	Rs. 22926.55 Crores
Total revenue generated (direct and indirect) 2013	-	Rs. 20430.00 Crores
% Variation over Previous year	-	12.22%

1.3 DISTRICT WISE AREA & POPULATION (As per Census2011)

Table 1.3: District – wise Area & Population (Census – 2011)

Sl. No.	District	Area in sq.km	Population		
			Male	Female	Person
1	Thiruvananthapuram	2192	1584200	1723084	3307284
2	Kollam	2491	1244815	1384888	2629703
3	Alappuzha	1414	1010252	1111691	2121943
4	Pathanamthitta	2637	561620	633917	1195537
5	Kottayam	2208	970140	1009244	1979384
6	Idukki	4358	551944	555509	1107453
7	Ernakulam	3068	1617602	1662258	3279860
8	Thrissur	3032	1474665	1635662	3110327
9	Palakkad	4480	1360067	1450825	2810892
10	Malappuram	3550	1961014	2149942	4110956
11	Wayanad	2131	401314	415244	816558
12	Kozhikode	2344	1473028	1616515	3089543
13	Kannur	2966	1184012	1341625	2525637
14	Kasaragode	1992	626617	675983	1302600
Kerala		38863	16021290	17366387	33387677

Chart 1.3.1: District wise Area (in Sq. Km)

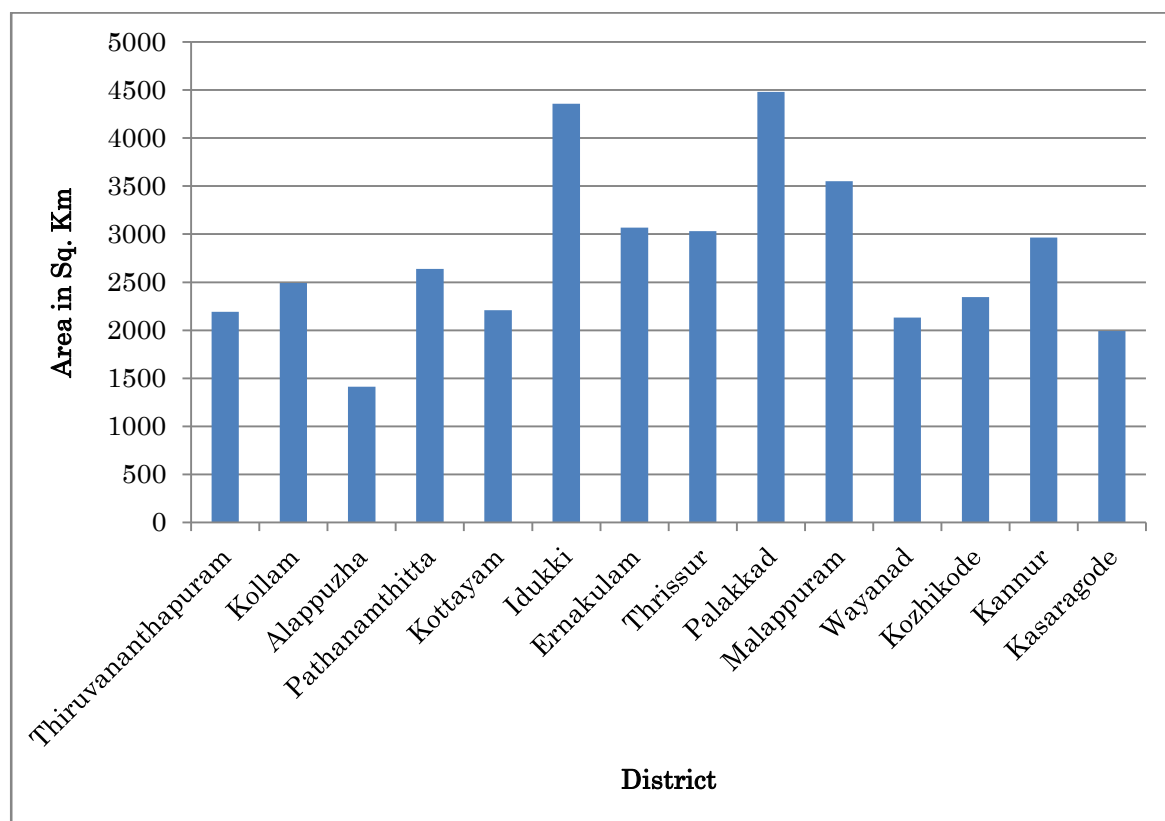
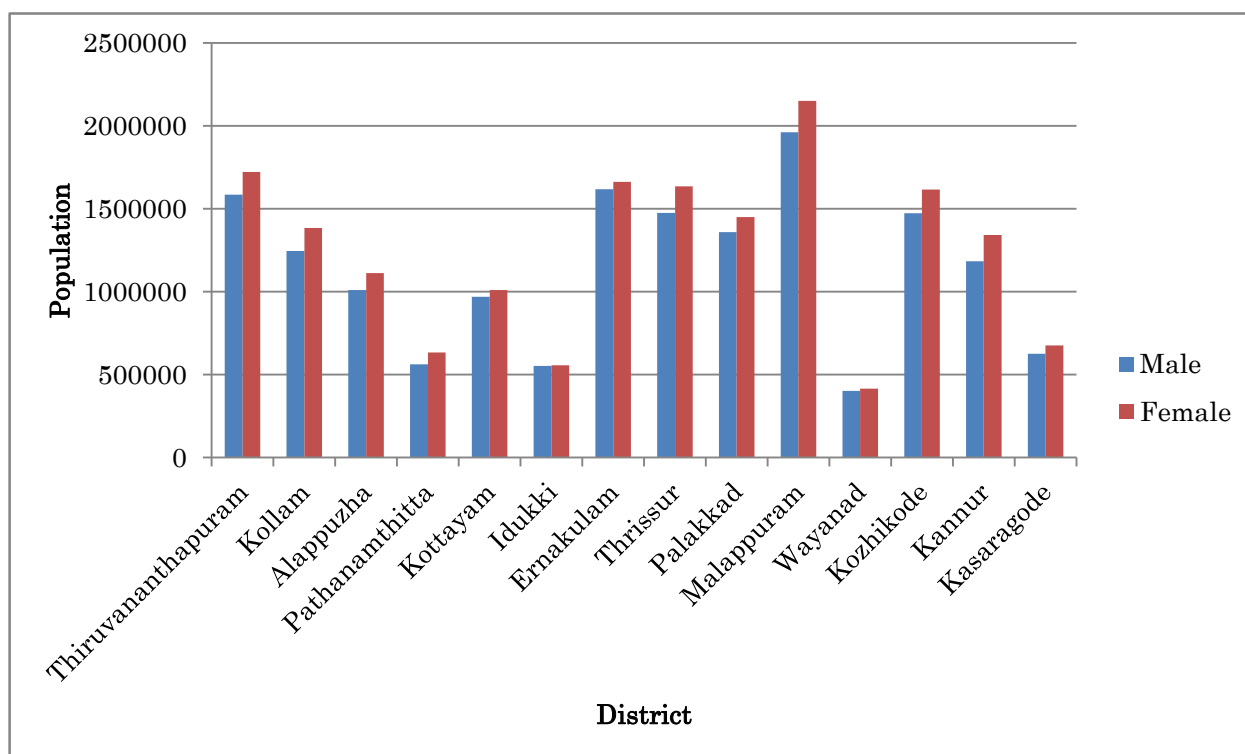


Chart 1.3.2: District wise Male Female Population of Kerala



1.4. ACCESSIBILITY

Airports : Thiruvananthapuram, Karipur (Malappuram, bordering Calicut) and Nedumbassery (Ernakulam)

Seaports : Kochi, Beypore (Kozhikode), Alappuzha, Kollam.

Major Beaches	:	Kovalam, Varkala, Fort Kochi, Kappad and Bekal
Major Wild Life Sanctuaries	:	Thekkady (Periyar), Parambikkulam, Wayanad, Silent Valley, Aralam, Peechi-Vazhani, Chimmani, Shenduruny, Idukki, Chinnar, Peppara, Neyyar.
Bird Sanctuary	:	Thattekad, Kumarakom
Major Hill Stations	:	Ponmudi, Peerumade, Thekkady, Munnar and Wayanad

1.5. APPROVED HOTELS AS ON December 2013

- i) No. of Classified Hotels : 389
- ii) No. of Rooms : 9799

10. TRAVEL TRADE AS ON 30.12.2013

- i) Number of Approved Travel Agencies -2
- ii) Number of Approved Tour Operators -6
- iii) Number of Approved Tourist Transport Operators -11

(II) WORLD

- 1. World Tourist Arrivals (Million) 1087
- 2. World Tourism Receipts (US\$ Billion) 1195

(III) INDIA'S POSITION IN WORLD

- 1 Share of India in World Tourist Arrivals 0.64%
- 2 Share of India in World Tourism Receipts 1.54%
- 3 India's rank in World Tourist Arrivals 42nd
- 4 India's rank in World Tourism Receipts 16th

(IV) KERALA'S POSITION IN INDIA TOURISM

- Kerala's rank in India Tourism in Foreign Tourist Arrival 7th
- Kerala's rank in India Tourism in Domestic Tourist Arrival 18th

2014 Highlights

TOURIST STATISTICS 2014 (Month-wise)

Sl. No.	Month	Foreign		% variation	Domestic		% variation
		2013	2014		2013	2014	
1	January	113627	119865	5.49	913203	996608	9.13
2	February	115403	127153	10.18	771880	842565	9.16
3	March	85953	93175	8.40	779086	845875	8.57
4	April	66371	72441	9.15	813247	884109	8.71
5	May	32600	36302	11.36	986407	1094086	10.92
6	June	29758	33898	13.91	744703	797847	7.14
7	July	45786	48577	6.10	724122	777948	7.43
8	August	64518	69909	8.36	842995	899473	6.70
9	September	51032	54245	6.30	892413	970136	8.71
10	October	67702	71598	5.75	1115718	1174814	5.30
11	November	83484	87720	5.07	1072124	1143110	6.62
12	December	101909	108483	6.45	1201913	1268840	5.57
TOTAL		858143	923366	7.60	10857811	11695411	7.71

TOURIST STATISTICS 2014 (District -wise)

Sl.No	District	Foreign			Domestic		
		2013	2014	% variation	2013	2014	% variation
1	THIRUVANANTHAPURAM	268444	289612	7.89	1556435	1707199	9.69
2	KOLLAM	11403	12467	9.33	235593	257097	9.13
3	PATHANAMTHITTA	1255	1379	9.88	103276	112548	8.98
4	ALAPPUZHA	55364	60337	8.98	225061	246156	9.37
5	KOTTAYAM	40932	44366	8.39	382197	413182	8.11
6	IDUKKI	68880	77905	13.10	586546	635621	8.37
7	ERNAKULAM	352314	372997	5.87	2545573	2724718	7.04
8	THRISSUR	6459	7391	14.43	2366389	2545376	7.56
9	PALAKKAD	1874	2093	11.69	438552	475361	8.39
10	MALAPPURAM	20569	21613	5.08	419884	449420	7.03
11	KOZHIKKODE	10489	11313	7.86	728041	769425	5.68
12	WAYANAD	10844	11795	8.77	519306	564274	8.66
13	KANNUR	6972	7563	8.48	553899	584343	5.50
14	KASARGOD	2344	2535	8.15	197059	210691	6.92
	Total	858143	923366	7.60	10857811	11695411	7.71

District wise Tourist Arrival Statistics -2014-Domestic

Sl.No.	DISTRICT.	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	Total 2014	Total 2013	% of variation
1	ALAPPUZHA	31615	24892	19512	25856	15821	11356	12258	16589	15953	21456	20059	30789	246156	225061	9.37
2	ERNAKULAM	255112	179425	190532	179503	216326	175804	189415	229936	225486	295841	292463	294875	2724718	2545573	7.04
3	IDUKKI	60523	59112	49987	60642	63737	28988	27956	39348	49562	66724	70579	58463	635621	586546	8.37
4	KANNUR	45109	40567	65432	46750	55798	43614	41937	46856	50164	49259	48796	50061	584343	553899	5.50
5	KASARGOD	20898	15129	14256	15216	20648	15117	15789	16974	17956	18796	18456	21456	210691	197059	6.92
6	KOLLAM	23533	21521	19986	20868	21248	17890	18112	22369	21456	21045	21654	27415	257097	235593	9.13
7	KOTTAYAM	39456	25460	27512	26672	35245	32320	27546	33586	40425	38988	40156	45816	413182	382197	8.11
8	KOZHIKKODE	58125	58111	59678	64775	73287	64982	61576	63453	65489	73456	64748	61745	769425	728041	5.68
9	MALAPPURAM	37978	34274	32464	36274	38950	34675	35010	37899	40256	40596	40458	40586	449420	419884	7.03
10	PALAKKAD	39478	35751	37540	38721	42612	45676	33258	36469	36346	47896	40158	41456	475361	438552	8.39
11	PATHANAMTHITTA	8179	7712	7153	10942	7755	8750	9103	9258	8688	16048	9115	9845	112548	103276	8.98
12	TRIVANDRUM	143722	140247	116573	117719	170788	108483	106654	122354	127594	156789	164789	231487	1707199	1556435	9.69
13	THRISSUR	187452	163649	152492	210456	288624	174725	161469	178737	228415	264493	249186	285678	2545376	2366389	7.56
14	WAYANAD	45428	36715	52758	29715	43247	35467	37865	45645	42346	63427	62493	69168	564274	519306	8.66
	Total 2014	996608	842565	845875	884109	1094086	797847	777948	899473	970136	1174814	1143110	1268840	11695411	10857811	7.71
	TOTAL 2013	913203	771880	779086	813247	986407	744703	724122	842995	892413	1115718	1072124	1201913	10857811		
		9.13	9.16	8.57	8.71	10.92	7.14	7.43	6.70	8.71	5.30	6.62	5.57	7.71		

District wise Tourist Arrival Statistics -2014-Foreign

Sl.No.	DISTRICT.	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC	Total 2014	Total 2013	% of variation
1	ALAPPUZHA	10216	10246	7053	4424	1791	1342	2041	4762	2649	3956	4752	7105	60337	55364	8.98
2	ERNAKULAM	45215	43125	32853	33516	19112	16847	17988	28416	22916	30266	36759	45984	372997	352314	5.87
3	IDUKKI	14216	14978	8279	3640	2340	2546	6053	4823	2747	6843	5546	5894	77905	68880	13.10
4	KANNUR	1124	1517	845	450	186	125	189	392	205	566	779	1185	7563	6972	8.48
5	KASARGOD	452	402	278	151	120	75	103	95	93	116	338	312	2535	2344	8.15
6	KOLLAM	2015	1987	1112	699	312	240	485	898	916	932	1123	1748	12467	11403	9.33
7	KOTTAYAM	4520	4656	3825	3970	1415	1214	3546	3750	3841	4264	4513	4852	44366	40932	8.39
8	KOZHIKKODE	1429	1365	1050	956	825	621	753	468	675	726	1134	1311	11313	10489	7.86
9	MALAPPURAM	1903	2924	1378	1112	844	1523	1750	1714	1189	2246	2579	2451	21613	20569	5.08
10	PALAKKAD	354	326	317	103	115	112	115	101	71	175	102	202	2093	1874	11.69
11	PATHANAMTHITTA	120	86	85	76	65	124	119	104	112	130	212	146	1379	1255	9.88
12	TRIVANDRUM	34283	42274	34334	22421	8326	8293	14564	23415	17989	20046	28426	35241	289612	268444	7.89
13	THRISSUR	1427	978	643	504	475	466	289	385	255	479	534	956	7391	6459	14.43
14	WAYANAD	2591	2289	1123	419	376	370	582	586	587	853	923	1096	11795	10844	8.77
TOTAL 2014		119865	127153	93175	72441	36302	33898	48577	69909	54245	71598	87720	108483	923366	858143	7.60
TOTAL 2013		113627	115403	85953	66371	32600	29758	45786	64518	51032	67702	83484	101909	858143		
% of variation		5.49	10.18	8.40	9.15	11.36	13.91	6.10	8.36	6.30	5.75	5.07	6.45	7.60		

CHAPTER 2



Kerala Tourism

2.1 KERALA TOURISM

Kerala, located on the south-western tip of India, enjoys unique geographical features that have made it one of the most sought-after tourist destinations in Asia. Fondly referred to as 'God's Own Country', Kerala was selected by the National Geographic Traveler as one of the 50 destinations of a lifetime and one of the thirteen paradises in the world.

An equable climate, serene beaches, tranquil stretches of backwaters, lush hill stations and exotic wildlife are the major attractions of this land. A unique advantage of Kerala is that most of the destinations here are only a two - four hour drive from the next one.

Classical art forms, rich and colorful festivals, exotic cuisine is some of the cultural marvels that await travelers. Ayurveda, the ancient Indian system of medicine and Panchakarma, the rejuvenation therapy in Ayurveda have also helped Kerala to gain a pan-global reputation as a worth-visit destination.

TOURISM IN KERALA RECEIVES WELL DESERVED RECOGNITION

In recent years the State of Kerala has received several awards and citations for their tourism related activities. These awards are the direct result of the concerted efforts of both the public and private sector working together to take Kerala's tourism industry to a world class level. What follows is a list of some of the accolades won by Kerala Tourism.

1. Lonely Planet-Travel Awards

- Best Destination for Families
- Best Destination for Relaxation
- Runner up – Best Destination for Value

2. Golden City Gate, ITB Berlin

- Silver for Print Campaign- Home of Ayurveda

3. Olive Crown Award

- Gold for Print Campaign- World Tourism Day

4. PATA Awards

- Gold Award for E-News Letter

5. National Tourism Award-2012-13

- Most Innovative Tourism Project Award for Kochi-Muziris Biennale
- Best Civic Management Award for Kumarakom Grama Panchayat
- Award for Most Innovative use of IT 2nd Prize in the Best State Category.

Cultural Initiatives

- 'Onam' –A weeklong celebration with great people participation
- Joint Initiative with Cultural Department to promote traditional arts and festivals
- Nishagandhi festival: The only event of its kind that captures the spirit of the season. It is held at the sprawling Kanakakkunnu palace grounds during January every year. Last year the festival has been modified as Nishagandhi International Dance Festival and instituted Nishagandhi Puraskaram(Award) to raise the standard of the festival.
- UTSAVAM- the Kerala Arts festival for the promotion of local cultural programmes held at many venues across the 14 districts of Kerala

Infrastructure

Tourism cannot be developed without necessary infrastructure. The need of the hour is to have facilities and enabling environment for sustaining the continued interest of the tourists to the state. The conservation and preservation act 2005 is a major step taken by the Government in this direction. Accordingly, the tourism department has been developing conservation and destination development programmes. Apart from the above, for enabling a healthy tourism environment we need good roads , efficient traffic systems, sea and inland waterways, hotels, wayside amenities, hospitality facilities, eateries, cultural centre , cruise berths , convention centres , water and electricity supply , information centres , human resource development centre, tourism signage network and so on.

PROMOTION AND PUBLICITY

The Department of Tourism has undertaken various innovative initiatives in the areas of promotion and publicity. The result is evident in the very high growth rate of tourist arrivals in Kerala. The major initiatives in these promotions include conducting fairs and festivals, participating in major tourism marts, advertising in print and electronic media, etc. The

following are some of the International and National festivals and fairs in which the Kerala Department of Tourism has participated:

- ◆ ATM Dubai
- ◆ Oddek leisure fair Moscow
- ◆ ITB Berlin
- ◆ IITE Malaysia
- ◆ MATKA, Finland
- ◆ FITTUR Spain
- ◆ WTM London
- ◆ TUR, Gothenburg
- ◆ MITT, Russia
- ◆ ITB Asia, Singapore
- ◆ TOPRESA, Paris
- ◆ Travel and Tourism Fair ,Bengaluru .
- ◆ Travel and Tourism Fair ,Mumbai.
- ◆ Travel and Tourism Fair , Kolkatta.
- ◆ Travel and Tourism Fair , Hyderabad .
- ◆ Travel and Tourism Fair , Surat .
- ◆ India International Cultural trade Activity,Simla.
- ◆ India International Trade Fair ,Nagpur.
- ◆ India International Trade Fair , New Delhi.
- ◆ India International Trade Fair , Goa.
- ◆ India International Trade Mart, Kochi.
- ◆ India International Trade Mart,Bengaluru.
- ◆ India International Trade Mart,Chennai.
- ◆ India International Trade Mart, Kolkatta.
- ◆ India International Trade Mart,Pune.
- ◆ India International Trade Mart, Hyderabad .
- ◆ India International Trade Exchange ,Vijayavada.
- ◆ India International Trade Exchange ,Aurangabad.
- ◆ India International Trade Exchange ,Raipur .
- ◆ South Asia Travel and Tourism Exchange , New Delhi.

Apart from these, we have been holding roadshows in major international destinations- London, Paris, New York, Sydney, Mila, Melbourne, Dublin, Rome, Lyon, Marseilles, Moscow, Budapest, Warsaw, Madrid.

Supporting Organizations

Kerala Tourism Development Corporation (KTDC)

KTDC is a commercial agency, which actively participates in building up basic infrastructure needed for the development of tourism in the State. KTDC is running hotels and wayside amenity centers in almost all tourist destinations.

Kerala Tourism Infrastructure Limited (KTIL)

Tourist Resort (Kerala) Ltd is the agency meant for joint venture projects. Presently there are 4 hotels at Varkala, Kumarakom, Thekkady and Ernakulam sharing with TAJ group. It also oversees the Land Bank Scheme. Investment development at tourism sector conducting of Investors Meet and formation of consultancy cell for tourism development are other major achievements.

Kerala Institute of Tourism and Travel Studies (KITTS) and Food Craft Institutes (FCIs)

Kerala Institute of Tourism and Travel Studies is a pioneer organization offering quality education and training in the State. These institutions are actively involved in the recruitment and placing of quality staff in the tourism site throughout Kerala. All aspects of Human Resources Development for the tourism and hospitality sectors are impacted by KITTS and FCIs by establishing and monitoring the quality regulations of the Tourism and Travel Training Institutes.

District Tourism Promotion Councils (DTPCs)

The District Tourism Promotion Councils have undertaken the responsibility of creating and marketing local tourism products and opportunities. They are constantly improving the quality standards of these tourism products and services through surveys and other data collection means. The DTPCs also monitor and supervise the levels of sanitation in tourist destinations. Other related activities of the DTPCs are the creation of awareness of the facilities and services in their specific area development of tourism clubs, dissemination of

tourism specific information, home stay scheme and development of local basic infrastructure.

Bekal Resort Development Corporation (BRDC)

Bekal Resort development Corporation Ltd is company formed for the development of Bekal and surrounding tourist attractions. The main focus is to provide marketing resources and to be actively involved in local, regional and state wide marketing promotions.

Muziris Heritage Projects Ltd.

Company under Department of Tourism formed in 2014 for operation and maintenance of assets created as a part of Muziris Heritage Project.

Kerala Adventure Tourism Promotion Society

For the promotion of adventure tourism in Kerala, Government of Kerala formed an Adventure Tourism Promotion Society. Paragliding at Wagamon in Idukki and Parasailing at Payyambalam beach in Kannur are two well- established adventure centres of International standard in Kerala.

Eco-Tourism

Kerala is famous for its ecotourism initiatives. The objectives of eco-tourism are to convert entire tourism industry in Kerala into eco-friendly mode, to strengthen Eco-tourism development initiatives in the state and to ensure local community involvement in tourism initiatives leading to employment and income generation.

Promotion and Publicity

The Department of Tourism has taken various innovative initiatives in promotion and publicity. The result is evident from the very high growth rate of tourist arrivals which Kerala is witnessing now .As part of the Govt's aggressive marketing initiatives, new steps were taken to market Kerala Tourism at both the national and international level. Kerala took part in important international tourism fairs like WTM, ITB, FITUR, TOP Resa , JATA and TUR and other popular domestic tourism fairs. New emerging markets were identified and Kerala Tourism was marketed there effectively. Roadshows were conducted in Saudi Arabia,

Australia, Scandinavia and other European markets like Berlin, Marseille, Milan, Madrid and London. The roadshows were successfully conducted in major cities across India as well.

Outlook for External Sector in Kerala

Kerala has long been and will continue to be a globally connected economy. Over dependence on horticulture and marine exports is risky as global community prices are beyond Kerala's control. Diversification of exports to include high value knowledge based goods and services will spread the risk as well as improve inward flows to the state. Similarly, Kerala is known more for semi-skilled emigrants, the one major exception being highly skilled nurses. Efforts should be made to increase the skill and employability of all Keralites so that they may benefit from global opportunities. The benefits gained in being a globally sought after tourist destination can be further enhanced through a variety of measures which ensure that Kerala remains a clear eco-friendly and safe destination with not only a rich historical and cultural tradition but a State which offers tourists world class recreation facilities.

I. Kerala Tourism and IT

Kerala Tourism has been maintaining its top position in the use of IT and web presence. In India, Kerala tourism has been occupying the number one position in web traffic among tourism board websites for more than a decade. In terms of web traffic, the site was among the top 10 tourism websites in the Asia Pacific and the Middle East. The site gets more than 3 million visits per annum. Quality of the visits to website is very high. On average visitors watch more than 4 pages in a visit and spend more than 4 minutes at the site.

- Alexa ranking of tourism websites of Middle East and Asia-Pacific

Sl. No.	Website	Country	Alexa Ranking
1.	www.visitkorea.or.kr	Korea	9,346
2.	www.australia.com	Australia	18,423
3.	www.newzealand.com	New Zealand	18,936
4.	www.discoverhongkong.com	Hong Kong	26,305

5.	www.yoursingapore.com	Singapore	34,325
6.	www.tourismthailand.org	Thailand	37,147
7.	www.indonesia.travel	Indonesia	40,399
8.	www.jnto.go.jp	Japan	40,464
9.	www.tourism.gov.my	Malaysia	42,381
10.	www.keralatourism.org	Kerala	47,009

- Alexa ranking of tourism websites in India

Sl. No.	Website	State	Alexa Ranking
1.	www.keralatourism.org	Kerala	47,009
2.	www.delhitourism.gov.in	Delhi	84,623
3.	www.maharashtratourism.gov.in	Maharashtra	89,601
4.	www.rajasthantourism.gov.in	Rajasthan	94,475
5.	www.gujarattourism.com	Gujarat	96,008
6.	www.mptourism.com	Madhya Pradesh	97,194
7.	www.himachaltourism.gov.in	Himachal	134,568
8.	www.goa-tourism.com	Goa	118,521
9.	www.tamilnadutourism.org	Tamil Nadu	176,461
10.	www.karnatakaturism.org	Karnataka	258,910

II. www.keralatourism.org – In brief

- The Kerala Tourism website has won several awards. It bagged the prestigious Award of Excellence instituted by the Government of India for the "Most Innovative Use of Information Technology" and "Best Tourism Website Portal" during the years 2000-2001, 2002-2003, 2005-2006, 2008-09, 2010-11 and 2012-13. International recognition to tourism's online initiatives came in the form of the

Pacific Asia Travel Association's (PATA) Gold Award for the best E- Newsletter during the years of 2005, 2012, 2014 and the best website in 2010.

- Kerala tourism started a website in 1998. Today it is available in 11 international languages and 10 Indian languages. The site offers 1,500 images and 3,000 videos. There are more than 100,000 pages. This website is an online encyclopedia on Kerala, with special focus on travel-oriented content. Kerala Tourism's initiatives have made website and monthly email newsletter as central axis of information dissemination. Since the variable cost involved in the use of email newsletter or accessing website is minimal, it has reduced the cost of service to a negligible level.
- Kerala tourism is a pioneer in using digital marketing tools. It brought out an interactive CD-ROM on destination Kerala playable on Windows and Mac as early as 1998 for destination promotion. It was translated into French, German, Japanese and Hindi. More than 2 lakhs copies of the CD have been circulated among travel industry across the globe. It was a mini encyclopedia on Kerala and was a unique experiment in destination promotion. This was designed and developed by Invis Multimedia (www.invismultimeida.com).
- Kerala tourism started using online video as early as in 1998. In the 1990s very few organizations used online video. But Kerala Tourism uploaded videos to its website on a regular basis. These videos of Kerala get very good viewership. Subsequently Kerala Tourism started a brand channel on YouTube (youtube.com/keralatourism) and uploaded more than 3000 video clips. Now it gets 3-4 million video views for the destination every year.
- Kerala Tourism Started developing GIS maps for travellers in 2002. Before Google Earth, Kerala Tourism started the efforts to develop the GIS map of Kerala for travelers. The project added places of Tourism importance infrastructures and tourism facilities as multiple layers to the map.
- The first Wap site of Kerala Tourism m.keralatourism.org was launched in 2006. This helped the users to access the site on mobile phone. However, in 2013, Kerala Tourism opted responsive design with HTML5. Here the website identifies the

equipment being used for web access and offers a design version accordingly. This helps the viewer to access the site through any device and get a design in tune with the format of the device being used. For example mobile phone, I Pad and Desktop PC gets different versions of the website.

- One of the major initiatives of Kerala Tourism is an online Painting Competition for children. This painting competition was in memory of Edmund Thomas Clint (1976 -83) a child prodigy who created 25,000 pictures during his life which lasted only 2522 days. Children from any part of the world can participate. They have to do a painting of Kerala for which they can get reference from the website www.keralatourism.org . The entries can be submitted online. The competition attracted many people to the website www.keralatourism.org.
- Produced a film for promoting both Ayurveda and Yoga.
- Kerala Tourism has done a Mobile App Idea contest. Contestants were asked to submit creative and original ideas that promote tourism to Kerala. This was one of the most unique campaigns of the year. The competition fetched more than 340 ideas.
- Kerala Tourism has conducted Great Kerala Food Championship. This was done to encourage people to use their creativity to share their experiences with the Kerala food in the form of an article written in English.
- Several international search engines rate www.keralatourism.org as the first site for information on Kerala since 2003. In both Google and Yahoo searches, www.keralatourism.org comes first in a search with the keyword 'Kerala'.
- The monthly e-newsletter of Kerala Tourism goes worldwide. It has become a periodical online mouthpiece of Kerala Tourism, enabling the travel fraternity to keep themselves updated on God's Own Country.
- This website disseminates useful information to travellers around the world through a two-way process and also keeps track of the varying interests of modern-day travellers, by regular online user-friendly interactions like emails,

message board, tour planner, online audio-visual galleries, video quizzes, live webcasts, e-books, e-newsletters etc.

- The online campaign undertaken by Kerala Tourism focuses on the profile of various sections of travellers, especially to invite the attention of high net worth tourists and business travellers. The campaign focuses on both domestic as well as international travellers. The campaign efficiencies are arrived at by feeding in research findings and optimization techniques.

The highlight of kerala Tourism websites are

1. Kerala Tourism Website with new Responsive Design

Kerala Tourism's official website has been relaunched with a responsive design optimised for viewing on multiple devices, including mobile phones and tablets. The website, www.keralatourism.org, has been rebuilt with HTML 5 which offers a far superior browsing experience for users than before, and an interface which is automatically customised for the device that is accessing it, be it a laptop, desktop, a smartphone or a tablet.

Since its launch the redesigned website has been getting steadily increasing page views. For the tech-savvy traveller who switches constantly between multiple gadgets, the new Kerala Tourism website provides a uniform, high-quality viewing experience on all devices, large and small.

2. Multiple language version

The content of the Kerala Tourism website is primarily in English. However, specific content which will not become obsolete has been translated into 11 international languages and 10 Indian languages. The 11 international languages are Arabic, Chinese, German, Dutch, French, Italian, Japanese, Portuguese, Russian, Spanish and Swedish. The 10 Indian languages are Bengali, Gujarati, Hindi, Kannada, Marati, Malayalam, Oriya, Punjabi, Tamil and Telugu.

3. Message Board with advanced features

A travel forum or message board is a platform where travellers post their query like tour package, tariff, best time for visit etc and various service providers provides offers and discounts. It is a tool that Kerala Tourism has been offering since 2003. For better privacy, Kerala Tourism has developed new Message board for the travel industry with advanced features like online login faculty, social login, search facility, added features to posted message etc.

In the advanced message board one has to a register and login to post and reply. Social login has also enabled for message board. Social login enables users to login to the message board using their social identity from other social networks such as Facebook, Google plus etc. Logged in users can rate replies which are posted in the message board. This will help to increase the authenticity of the replies and persuade service providers to post their answers accurately and relevant to the topic.

In the message board respondents can make their reply 'private or public'. Public replies can be viewed by everyone who accesses the traveler forum. The private replies can only be viewed by the travelers who posted the original query. Thus the privacy of such replies can be protected.

There is also a search option in the message board. It helps to search all content on the message board and generate a result wherever an item contains a word matching the search criteria. The presentation of the search results are arranged by date, topic or subject.

4. Advanced Online Tour Planner

Kerala Tourism has developed a tour planner 7 - 8 years ago to assist tourists to schedule their travel itinerary prior to their departure to Kerala. Many changes occurred both in service sector and technology. Keeping that in mind, Kerala Tourism developed an advanced online tour planner which helps visitor to create a customized tour plan in easy steps. New tour planner

offers unique options like Social Login, Google maps to show travel route, Sharing in social media, Suggestion form etc.

Users can login using normal login or Social login. Social login reduces the barriers to register and login to the site, allowing the travelers to authenticate their identities using a preferred social network account. Current tour planner allows the user to share travel plan developed with their friends through the social media. We can use Social Media like a highly personalized press release for our content through this feature.

Newly developed tour planner can make use of Google maps to automatically generate local maps and driving directions for any locations. One of the biggest advantages of Google maps is the three different map views it supplies. There is a normal map view, a satellite image view and a terrain view, depending on the need of the user.

5. Online promotional movies of Kerala Tourism

All the promotional movies produced by Kerala Tourism have been uploaded in Kerala Tourism website. This include movies ideal for popular viewing (Flash) as well as for download (MPEG4) that popularize Kerala internationally.

6. Online 'High-resolution Photo Gallery'

There is a on high resolution pictures of Kerala. Those who want to publish Kerala pictures can download these free-to-use images.

7. Web content for exploring destination

Several international search engines rate www.keralatourism.org as the first site for information on Kerala since 2003. In both Google and Yahoo searches, www.keralatourism.org comes first in a search with keyword 'Kerala'. One of the major reasons for this achievement is the continuous updation of the site with text content, text, photographs and videos.

To explore this, we have uploaded detailed content of main destinations such as Varkala, Kumarakom, Kochi, Munnar, Periyar, Malabar, Wayanad and Bekal in the site.

III. IT Initiatives of Kerala Tourism

One of the popular travel websites from India, www.keralatourism.org, continues to be the favourite online gateway for travelers visiting Kerala. With its rich content on various travel-related segments in Kerala, the users of the website have over the years been treated to a multitude of innovative features. A website that started with basic and essential data for travelers, later on its way, incorporated several new features, of which the notable ones have the hallmarks of innovation and user interactivity. It is the first travel website of a state in India to incorporate resourceful and user-friendly IT initiatives for the benefit of worldwide travelers. Its current popularity among worldwide users can be learnt from the high ranking it attained in Google Search listing.

The website is now a repository of innovative features encouraging repeat-visitors. There are also several interactive features that help service providers and business community to make their services and efforts more cost effective and efficient. Effective Search Engine Optimization has helped the site to attain a high ranking in Google Search when compared to travel websites of other states in India.

Kerala Tourism has taken up several IT initiatives.

1. Online Contests

Kerala Tourism conducted many online campaigns in 2014 to drive more traffic to the site. One of the major initiatives of Kerala Tourism is an online Painting Competition for children. This painting competition was in memory of Edmund Thomas Clint (1976 -83) a child prodigy who created 25,000 pictures during his life which lasted only 2522 days. The competition attracted many people to the website www.keralatourism.org.

Also done a Mobile App Idea contest. Contestants were asked to submit creative and original ideas that promote tourism to Kerala. This was one of the most unique campaigns of the year. The Great Kerala Food

Championship campaign This was done to encourage people to use their creativity to share their experiences with the Kerala food in the form of an article written in English.

2. Online Video Quizzes

Kerala Tourism has organized two online video quizzes, The interactive quiz helped in bringing better page views and traffic to Kerala Tourism website.

First online video quiz was with exotic video clips of Kerala. Dr. Shashi Tharoor, Hon'ble Union Minister of State for Human Resource Development and an eminent scholar was the quiz master. Second quiz intended to promote Ayurveda. These interactive quiz helped in bringing better page views and traffic to Kerala Tourism website. There were many gifts to winners including tour packages / ayurveda packages, besides mobile phones, Kerala souvenirs, herbal cosmetics and mementoes. During these campaigns, the page views of the website gone upto 3 million from just one million.

3. E-books

An ebook (electronic book) is a book-length publication in digital form, consisting of text, images. Kerala Tourism is a pioneer in using books with well researched content for promoting the destination. Most of these came out as sponsored titles of Kerala Tourism and Kerala Tourism met part of the cost. Kerala Tourism has sponsored the following four e-books.

- a. Panchakarma: Ayurveda's Mantra of Rejuvenation'
- b. Ayurveda: The Mantra of Niramaya'
- c. Kerala: A Poem in Green and Gold
- d. YogaSutra': The Art and Science of Living

These e- books were sold over internet. One brochure of Kerala Tourism has converted as e- brochure and attached to the e- books. Every person downloading e-book will also be supplied a brochure of Kerala Tourism free of cost. The URL of Kerala Tourism, www.keralatourism.org is placed at the end of each chapter of the e-books as a source of reference.

4. QR code

Kerala Tourism has generated QR Code. This make easy for the new generation devices user to access information. QR Codes are two dimensional square barcodes that contain data such as Contact info, email add, geo location, URLs, phone numbers and other useful text.

Kerala Tourism QR Codes is used to store URL of Kerala Tourism website, www.keralatourism.org which can printed in magazines, business cards etc. Smartphones, Tablets and any new generation devices with QR-code scanner (free tool), can use this QR code for the easy accessibly of the website of Kerala Tourism.

5. Theyyam Calendar with Geo code

The Theyyam calendar contains illustrations and images of 100 Theyyam festivals in Malabar. It highlights temple locations, dates of performances and details of the contact persons associated with upcoming shows. This collection includes one hundred videos of Theyyam performances at various geographical locations throughout North Malabar. The videos will provide a general idea of the costumes, rhythm, music and dance of this rich art form.

6. Virtual Video wall

A virtual video wall displaying the best moving visuals of Kerala was set up in the website of Kerala Tourism for two months. Tourism website showcased clips of key destinations mixed with dream season ads. These are showcased on Kerala Tourism's brand channel on YouTube too.

7. Live webcast of events / festival

Kerala Tourism has done live webcast of some of the events / festivals in order to expand the reach and impact of events. Conducted live webcast of Nishagandhi dance and music festival, theyyam festival and Arattupuzha Pooram. The benefits of live webcast are wider audiences and richer content.

The events got a big coverage in media. The entire content of the event is in the brand channel of Kerala Tourism in YouTube.

8. Virtual Reality movies on destinations

The Quick Time Virtual Reality feature in the Kerala Tourism website gives users a 360-degree visual experience of select destinations in the state. These destinations have been selected based on their popularity and experiences offered. Users can select a destination, enjoy a look around and experience the feel of actually being present in the destination.

Kerala Tourism has developed QTVR movies on destinations like Kovalam, Kumarakom, Munnar, Thekkady, Fort Kochi, Bekal, Muzhappilangadu Beach, Thalassery Fort, Dharmadam Island, Kannur Fort, Pookott Lake, Thamarassery Churam, Kuruva Island, Arakkal Kettu, Kadalundi Bird Sanctuary and the Jewish Synagogue at Chennamangalam. QTVR movies on houseboats are also available.

Later Kerala tourism created virtual tour of Ashtamudi Backwater, Athirappally, Bolgatty, Gavi, Nelliampathy, Ponmudi, Thekkady, Vagamon, Valiyaparmba Backwater and Varkala. All these images are now available to travellers all around the world through the website www.keralatourism.org.

9. 'Audio-Visual Guide' on traditional Kerala cuisine

Kerala has a rich package of recipes, both vegetarian and non-vegetarian. The interaction with international community for millennia, proximity to sea shore, abundance of spices; all played a major role in the evolving of a cuisine different from other parts of India.

This audio guide contains the demonstration of preparation of vegetarian, non-vegetarian, tribal dishes and Malabar cuisines. These were produced and uploaded in the site along with detailed descriptions in English for introducing and popularizing Kerala cuisine among travellers.

10. Video Documentation of tourism projects

According to comscore statistics 2013, there are about 54 million internet users in India watched videos on computer (27% increases from last year) Also 50 million people watch video on You Tube. Two years it was about 15 million. Video on internet has emerged as a new medium available on different display devices like Desktop, laptop and tablet PCs, mobile phones, internet TVs etc. To explore this, we have uploaded videos on a variety of topics in the site. They include:

- Video on seven *Poorams* and *Velas*
- Video on Champakkulam Boat Race
- Video on Aanayoottu at Vadakumnatha Temple
- Movie on Christian art forms
- Movie on Muslim art forms
- Movie on Western Ghats
- Movie on Kappalottam
- Movie on Attukal Pongala
- Movie on How to Reach Kerala
- Movie on How to Reach Sabarimala
- Movie on Sacred groves of Kerala
- Movie on major temples around Sabarimala

11. Online accreditation

a. *Online accreditation of Tour operators*

An online mechanism for receiving applications from travel/tour operators for accreditation has been introduced by Kerala Tourism. Application for accreditation can be submitted online and the certificates will be issued online after verification. The facility simplifies the accreditation process and avoids delays in processing and distribution.

b. *Online accreditation of Houseboats*

A completely online system has been put in place for the accreditation of Houseboat Operators in the state. The system includes facility for online submission of applications.

c. Online Homestay accreditation

Accreditation process was initiated by Kerala Tourism for ensuring quality and competence of homestays in the state. Now it is mandatory for all homestays to get accreditation from the Department of Tourism. An online system has been introduced to facilitate the process of homestay accreditation. Homestay owners can submit the accreditation form, upload documents and images through this system

12. E - Submission of forms

a. e-Submission of C forms

Registration of C-forms carrying details of foreigners staying at properties in Kerala can now be done online through the official website of Kerala Tourism. The new mechanism saves time of property owners, as they are exempted from physically submitting the hardcopies at the nearest police station. The database can be made use of by Kerala Tourism to develop strategies for tourism promotion activities.

b. e-Submission of Tourist arrival details

As part of its efforts to streamline and expedite collection of tourist arrival data, Kerala Tourism has introduced a facility for e-submission of tourist arrival data. The accommodation providers in the State have been provided with a unique user id and password, with which they can upload details of tourist arrivals on a daily basis. The details can be submitted nationality-wise for foreign tourist arrivals and state-wise for domestic tourist arrivals. It will help Kerala Tourism to have real-time data on tourist arrivals and plan promotional strategies.

13. Microsites

a. *Microsite for Muziris Heritage Project*

The Muziris Heritage Project is being developed as a tourism heritage circuit, in association with the Govt. of India. This historically and culturally-rich site is spread across Kodungalloor and Paravur region in the districts of Thrissur and Ernakulam respectively. The microsite provides details and nearly 200 photographs of this oldest heritage site in Kerala.

b. *Microsite for Responsible Tourism initiatives*

The focus of this exclusive website section is to highlight the “Second International Conference on Responsible Tourism 2008” held in Kerala. The website was designed and developed to provide the best possible online publicity for the event. The concept and design of the website was in tune with the theme of “Responsible Tourism.” This microsite helped Kerala Tourism to make the event a successful one and also to spread the message of Responsible Tourism among all sections of people; both inside and outside the State.

14. Surveillance cameras at the houseboat station in Alappuzha

Kerala Tourism ensures safe and secure holidays for travelers. As part of its safety initiatives, Kerala Tourism plans to install digital network surveillance systems at beaches and backwater destinations. This initiative is also helpful during VIPs visit and also to avoid accidents in the beach and identification of people behind incidents.

As a first step Kerala Tourism installed IP Network Video solutions in the houseboat station at Alappuzha to enhance the security and surveillance of this tourist spot. These solutions using the IP based network cameras and network recorders will help to communicate the live images from remotes sites and view at the control rooms. This digital solution provides the uniqueness of one to many transmissions of the live images through wireless

network. Also it provides the advantage of customization as per the department requirements. The scalability using this emerging technology is the key in expanding the network and using the same for upcoming applications.

15. Audio Guide on safety measures

Boating is a major component of backwater tour packages. Lakes situated atop hill stations and coastal picnic spots also offer boating facilities to travellers. A sizeable percentage of the travellers visiting these places may not know swimming and would not be familiar with boating in deep water. In view of the boat tragedy at Periyar, Kerala Tourism has initiated steps to produce educational material for teaching safety measures to travelers and published an audio guides in Hindi, English and Malayalam for passengers and boat crew on the safety measures to be followed in emergency situations.

16. Promotion through mobile application on Android Platform

Android smart phones and tablet PCs occupy No.1 spot in the US & Asia market and has the second largest share in Europe. Cost effectiveness and popularity of Android platform promoted by Google has prompted many of the world famous device manufactures like Samsung, Sony, LG, HTC, Motorola etc to adopt this platform. Kerala Tourism has developed a mobile application for Android phones with sufficient content support. End users can download this application for their smart phones and Tablet PCs. As a result technically they stay connected to Kerala Tourism campaigns.

The application developed is interactive. Besides Kerala Tourism, travelers and travel industry players can upload and publish their content subject to the approval of Kerala Tourism.

17. Kerala Tourism e-Newsletter

The monthly *e-Newsletter* from Kerala Tourism goes around the world as an abridged version in HTML format. The topics featuring in the *e-Newsletter*

hyperlinks, leading readers to the full version of the topic, which is loaded from the website.

The prime objective of the *e-Newsletter* is to keep the travel and tour fraternity of the world in touch with the tourism specialties of Kerala and to make them aware of the latest developments in the destination. The above-mentioned objective is met through an interesting mix of topics that consistently strive to maintain the interest level of readers. We have sections in the newsletter on events and news plus special features on destinations, heritage, culture and experiences.

18. Video Channel on YouTube

Video sharing sites have become an attractive feature for internet users, thanks to increased connectivity and higher bandwidth. Today video sharing sites like You Tube have been accepted as a cost effective medium of communication for distributing short movies.

In this background, a brand channel, www.youtube.com/keralatourism was started on YouTube and around 3000 videos of Kerala Tourism are currently available in this. The URL www.keralatourism.org is displayed in all these videos.

2.2 TOURIST STATISTICS-2013

- ◆ Foreign Tourist arrival to Kerala during the year 2013 is **8, 58,143** It shows an increase of **8.12 %** over the previous year's figure of **7, 93,696**.
- ◆ Domestic Tourist arrival to Kerala during the year 2013 is **108, 57,811**. It shows an increase of **7.75 %** over the previous year's figure **100, 76,854**.
- ◆ **Foreign exchange earnings** for the year 2013 is **Rs: 5560.77 Crores** which recorded an increase of **21.63 %** over the previous year.
- ◆ **Total Revenue (including direct & indirect)** from Tourism during 2013 is **Rs: 22,926.55 Crores**, showing an increase of **12.22%** over the last year's figure.

- ◆ Month wise Foreign and Domestic Tourist arrivals during the year 2013 is as shown below:

Sl. No.	Month	Foreign	Domestic
1	January	113627	913203
2	February	115403	771880
3	March	85953	779086
4	April	66371	813247
5	May	32600	986407
6	June	29758	744703
7	July	45786	724122
8	August	64518	842995
9	September	51032	892413
10	October	67702	1115718
11	November	83484	1072124
12	December	101909	1201913
TOTAL		858143	10857811

2.3 Foreign Tourist Visits in Kerala over the Years

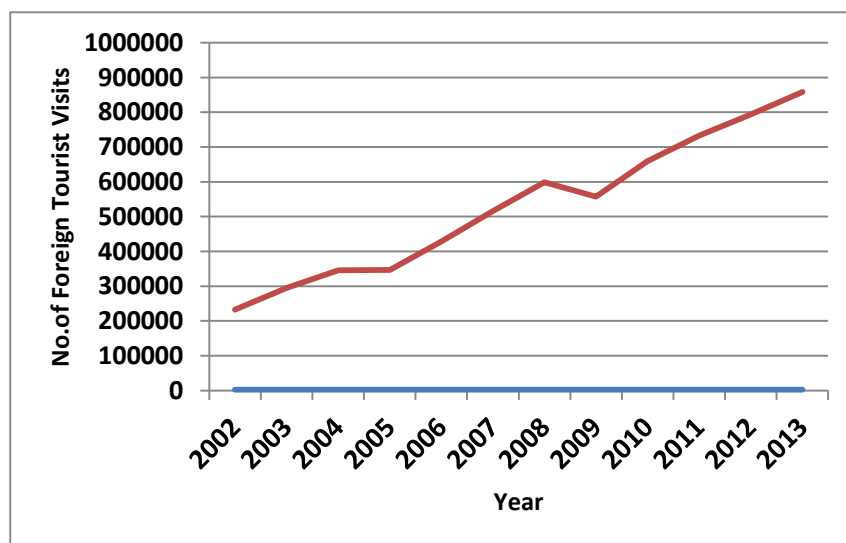
Foreign tourist visits in Kerala during 2013 were 858143 as compared to 793696 in the previous year and thus registered an increase of about 8.12 percent. Foreign tourist arrivals in Kerala since 2002 are given in the Table – 2.3.1.

Table – 2.3.1: Foreign Tourist Arrivals in Kerala (2002-2013)

FOREIGN TOURIST VISITS IN KERALA DURING 2002 TO 2

Year	No.of Foreign Tourist Visits	%of increase
2002	232564	11.37
2003	294621	26.68
2004	345546	17.28
2005	346499	0.28
2006	428534	23.68
2007	515808	20.37
2008	598929	16.11
2009	557258	-6.96
2010	659265	18.31
2011	732985	11.18
2012	793696	8.28
2013	858143	8.12

Chart – 2.3.1: Foreign Tourist Arrivals in Kerala (2002-2013)



2.4. Main Source Markets of Foreign Tourists

The single largest source market of Kerala for foreign tourist visits is United Kingdom, with a share of about 17.18 percent in 2013. In fact, United Kingdom has been continuing as the top tourist market of Kerala over the years. The second largest market was France with a share of 9.57 percent and it was followed by Germany with a share of about 8.78 percent in 2013. The nationality – wise foreign tourist visits during 2013 is given in Table – 2.4.1

Table – 2.4.1 Nationality – Wise Visits of Foreign Tourists in 2013

Sl.No.	Row Labels	Tourist Number	% to total
1	United Kingdom	147435	17.18
2	France	82154	9.57
3	Germany	75377	8.78
4	United States of America	71711	8.36
5	Saudi Arabia	45998	5.36
6	Australia	35802	4.17
7	Russia	32000	3.73
8	Switzerland	25235	2.94
9	Malaysia	24237	2.82
10	Canada	22809	2.66
11	Italy	22311	2.60
12	Sweden	20671	2.41
13	United Arab Emirates	16981	1.98
14	Oman	16906	1.97
15	Netherlands	15047	1.75
16	Denmark	14149	1.65
17	Maldives	12801	1.49
18	South Africa	12741	1.48
19	Austria	11269	1.31
20	Belgium	10467	1.22
21	Spain	10192	1.19
22	Israel	9785	1.14
23	Japan	8046	0.94
24	Kuwait	7328	0.85
25	Singapore	6686	0.78
26	New Zealand	5844	0.68
27	Sri Lanka	3562	0.42
28	China(Main)	3558	0.41
29	Bahrain	3478	0.41
30	Korea (North)	2856	0.33
31	Brazil	2537	0.30

32	Qatar	2266	0.26
33	Philippines	1556	0.18
34	Nepal	1340	0.16
35	Iran	1276	0.15
36	Thailand	1073	0.13
37	Bangladesh	846	0.10
38	Kenya	846	0.10
	Others	68967	8.04
	Grand Total	858143	

Table 2.4.2LEAN & PEAK MONTHS OF FOREIGN TOURIST ARRIVAL TO INDIA FROM TOP 15 COUNTRIES DURING 2013

SL NO	Nationality	Lean Month	Peak Month
1	United States	September	December
2.	United Kingdom	June	December
3.	Bangladesh	April	October
4.	Srilanka	May	August
5.	Russian fed.	June	December
6.	Canada	May	December
7.	Germany	June	March
8.	France	May	February
9.	Malaysia	April	November
10.	Japan	May	November
11.	Australia	June	December
12.	Chaina(Main)	June	December
13.	Singapore	April	December
14.	Thailand	September	November
15.	Nepal	June	October

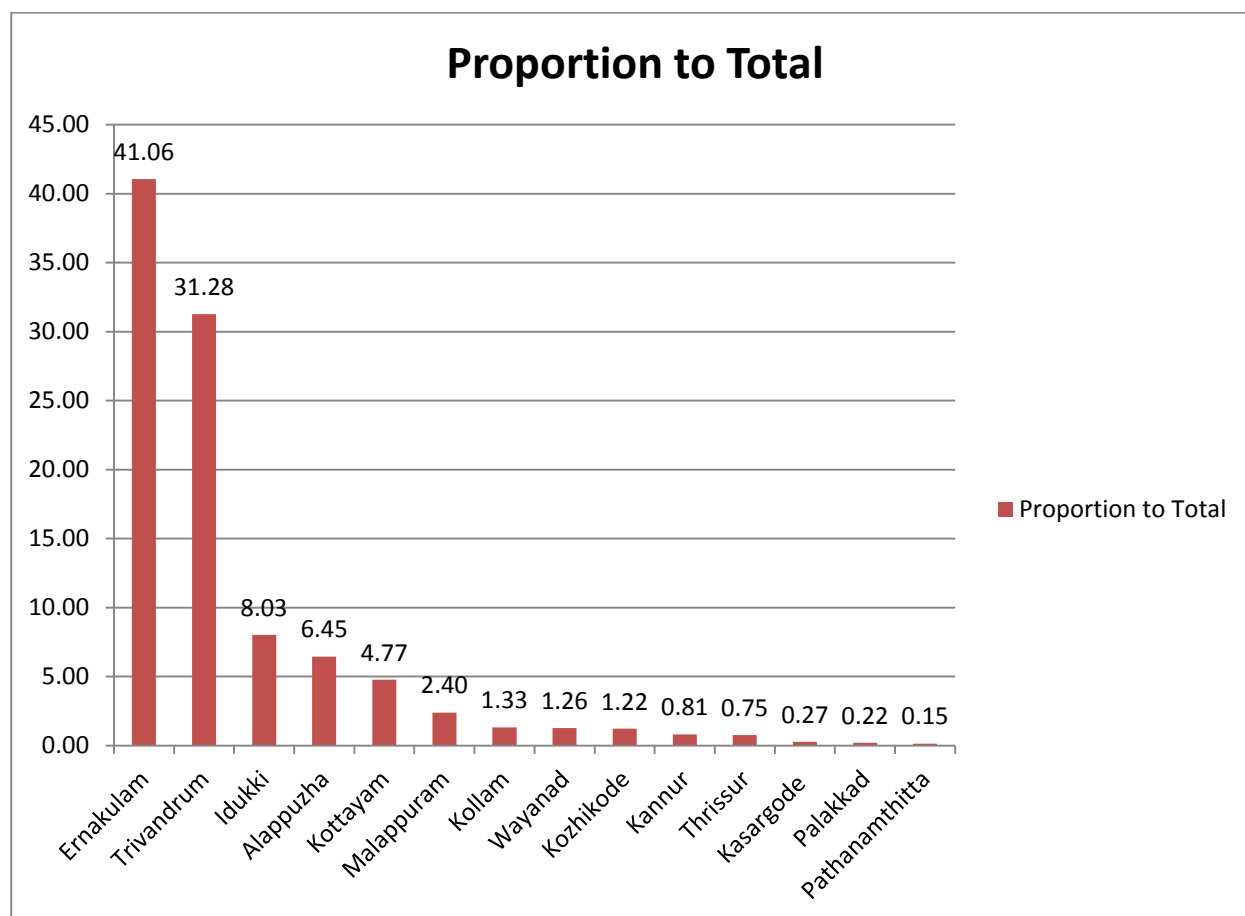
Source :India Tourism Statistics 2013

2.5. District – wise Distribution of Foreign Tourist Visits

Ernakulam district received the highest share of foreign tourist visits during 2005 and 2013. Trivandrum came second in the proportion of foreign tourist visits. The other districts which could receive a sizeable share of foreign tourists during 2011-13 were Idukki, Alappuzha and Kottayam. The district-wise distribution of foreign tourist visits in Kerala during the last seven years is given in Table – 2.5.1.

Table – 2.5.1 District – Wise Foreign Tourist Visits in Kerala

Sl.No	DISTRICT	2005	2006	2007	2008	2009	2010	2011	2012	2013	Proportion to Total
1	TVM	119940	151578	193924	234797	176571	204049	224387	242739	268444	31.28
2	KLM	6813	7918	8854	8728	8010	8211	9317	9976	11403	1.33
3	PTA	349	346	547	349	599	829	964	1253	1255	0.15
4	ALP	30274	36407	40463	49866	33493	41977	46019	50760	55364	6.45
5	KTM	20017	26543	27358	27230	24623	32561	37573	40926	40932	4.77
6	EKM	108773	44583	165125	193013	239364	277675	308674	330390	352314	41.06
7	IDKI	39378	131767	46463	51025	38185	48295	55778	62387	68880	8.03
8	THR	2421	4142	4645	3398	3452	4326	5011	5946	6459	0.75
9	PKD	801	809	615	785	1170	1270	1331	1557	1874	0.22
10	MLPM	5115	7109	9766	10166	13499	16915	18394	19417	20569	2.40
11	WYND	942	2611	4093	5638	5362	6575	7567	9541	10844	1.26
12	KKD	8420	11154	10020	9966	7513	9017	9892	10476	10489	1.22
13	KNR	2090	2730	3067	3143	4186	5886	6038	6257	6972	0.81
14	KSD	1166	837	868	825	1231	1679	2040	2071	2344	0.27
	Grand Total	346499	428534	515808	598929	557258	659265	732985	793696	858143	100

Chart – 2.5.1. District – wise Percentage Share of Foreign Tourist Visits in Kerala in 2013

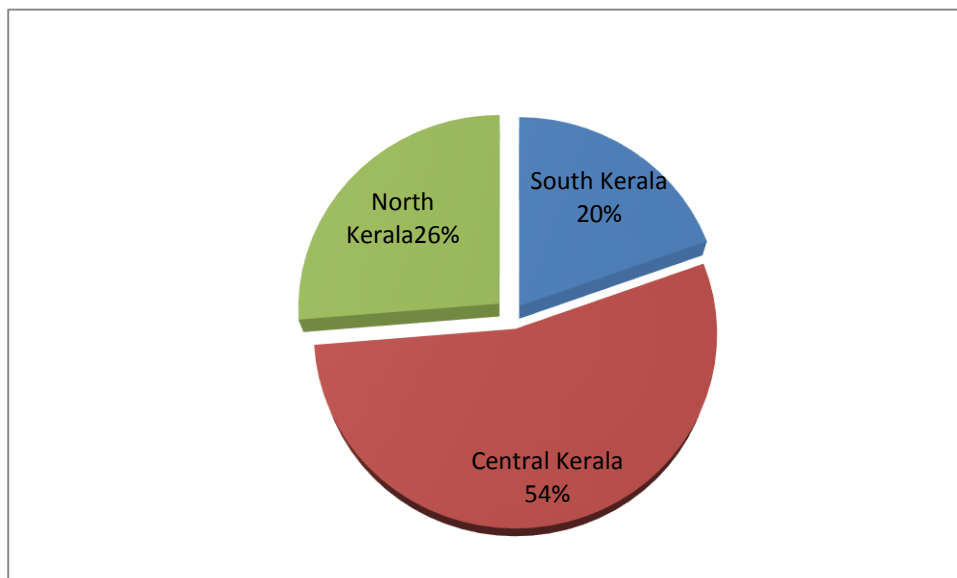
2.6. Region – wise and District – wise Foreign Tourist Visits in Kerala 2005 – 2013

Region – wise and district – wise foreign tourist visits since 2005 are given in Table 2.6.1. The Central and South Kerala have been receiving the highest share of foreign tourists over the years. The northern region consisting of the six districts of Palakkad, Malappuram, Wayanad, Kozhikode, Kannur and Kasaragode received only 6.19 percent of the total tourist visits in Kerala during 2013.

Table – 2.6.1: Region – wise and District – wise Foreign Tourist Visits in Kerala Over the Years

Sl.No	DISTRICT	2005	2006	2007	2008	2009	2010	2011	2012	2013	Proportion to Total
South Kerala											
1	TVM	119940	151578	193924	234797	176571	204049	224387	242739	268444	31.28
2	KLM	6813	7918	8854	8728	8010	8211	9317	9976	11403	1.33
3	PTA	349	346	547	349	599	829	964	1253	1255	0.15
4	ALP	30274	36407	40463	49866	33493	41977	46019	50760	55364	6.45
	Total	157376	196249	243788	293740	218673	255066	280687	304728	336466	39.21
Central Kerala											
5	KTM	20017	26543	27358	27230	24623	32561	37573	40926	40932	4.77
6	EKM	108773	44583	165125	193013	239364	277675	308674	330390	352314	41.06
7	IDKI	39378	131767	46463	51025	38185	48295	55778	62387	68880	8.03
8	THR	2421	4142	4645	3398	3452	4326	5011	5946	6459	0.75
	Total	170589	207035	243591	274666	305624	362857	407036	439649	468585	54.60
North Kerala											
9	PKD	801	809	615	785	1170	1270	1331	1557	1874	0.22
10	MLPM	5115	7109	9766	10166	13499	16915	18394	19417	20569	2.40
11	WYND	942	2611	4093	5638	5362	6575	7567	9541	10844	1.26
12	KKD	8420	11154	10020	9966	7513	9017	9892	10476	10489	1.22
13	KNR	2090	2730	3067	3143	4186	5886	6038	6257	6972	0.81
14	KSD	1166	837	868	825	1231	1679	2040	2071	2344	0.27
	Total	18534	25250	28429	30523	32961	41342	45262	49319	53092	6.19
	Grand Total	346499	428534	515808	598929	557258	659265	732985	793696	858143	100

Chart – 2.6.1. Region – wise Foreign Tourist Visits in Kerala in 2013

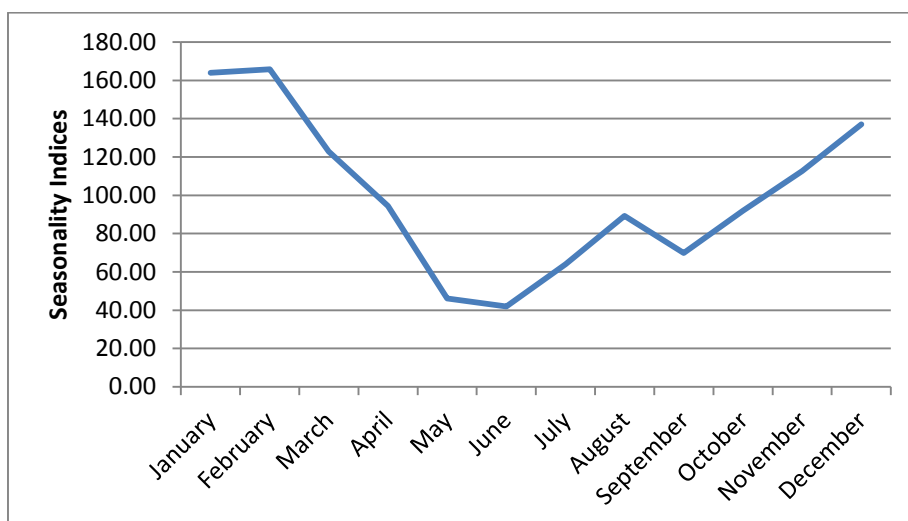


2.7. Seasonality in Foreign Tourist Visits

There is significant seasonality in foreign tourist visits to the State. While the months of November, December, January, February and March receive the maximum number of tourists, the month of June receives the least number of tourists. The month – wise foreign tourist visits since 2006 along with month – wise seasonality indices are given in Table – 2.7.1.

Table – 2.7.1: Month wise Foreign Tourist Visits and Seasonality Indices

Sl. No	Month	2006	2007	2008	2009	2010	2011	2012	2013	% of variation over previous year	Seasonality Indices
1	January	58,858	72,814	85,028	77,839	87,553	94,966	106,314	113,627	6.88	164.03
2	February	56,530	66,131	78,155	71,136	86,747	94,185	103,220	115,403	11.80	165.86
3	March	39,584	56,151	71,026	57,250	61,334	66,854	75,544	85,953	13.78	122.93
4	April	32,377	34,487	39,538	43,473	50,910	57,215	61,335	66,371	8.21	94.50
5	May	20,470	21,098	26,348	25,386	26,783	28,938	30,470	32,600	6.99	46.18
6	June	16,209	18,262	20,578	19,499	24,685	26,738	28,280	29,758	5.23	41.89
7	July	23,578	25,199	31,610	28,914	36,188	40,931	42,977	45,786	6.54	63.98
8	August	28,821	35,563	45,711	39,079	49,518	56,230	59,904	64,518	7.70	89.22
9	September	21,888	24,708	28,292	29,283	37,859	44,673	47,440	51,032	7.57	69.81
10	October	28,681	33,534	39,748	38,870	49,512	59,414	63,690	67,702	6.30	91.92
11	November	44,421	55,647	59,923	56,880	66,526	73,843	78,833	83,484	5.90	112.73
12	December	57,117	72,214	72,972	69,649	81,650	88,998	95,689	101,909	6.50	137.00
	Total	428,534	515,808	598,929	557,258	659,265	732,985	793,696	858,143	8.12	

Chart– 2.7.1: Month wise Foreign Tourist Visits and Seasonality Indices

2.8. District wise and month wise foreign tourist visits during 2013

Month – wise foreign tourist visits in different districts of Kerala during 2013 are given in Table – 2.8.1. Ernakulam district received the maximum number of foreign tourists in all the months except March, while Thiruvananthapuram received the largest number of tourists during March. The peak month of foreign tourist visits in Ernakulam district was January while it was February in the case of Thiruvananthapuram. The ratio between the highest and lowest tourist visits was 6.69 in the case of Thiruvananthapuram, while it was only 2.70 in the case of Ernakulam. Thus, seasonality was more pronounced in the case of Thiruvananthapuram.

Table – 2.8.1: District wise and Month wise Statistics of Foreign Tourist Visits During 2013

District wise Tourist Arrival Statistics -2013-Foreign														
Sl.No.	DISTRICT.	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	Total
12	TRIVANDRUM	32514	38460	32858	20078	7472	5749	13279	21758	17290	18773	26919	33294	268444
6	KOLLAM	1918	1856	1003	617	298	219	470	814	827	881	1007	1493	11403
11	PATHANAMTHITTA	84	75	79	68	61	118	116	98	106	122	194	134	1255
1	ALAPPUZHA	9523	9243	6394	4039	1502	1205	1921	4233	2533	3697	4393	6681	55364
7	KOTTAYAM	4086	4057	3548	3649	1346	1118	3414	3313	3505	4022	4217	4657	40932
2	ERNAKULAM	44127	39684	29717	31356	17563	16332	17340	26897	21427	28893	35891	43087	352314
3	IDUKKI	12547	12987	7186	3216	1717	2153	5593	3865	2488	6547	5017	5564	68880
13	THRISSUR	1312	876	502	406	396	323	273	352	239	438	495	847	6459
10	PALAKKAD	314	287	291	96	94	102	109	99	65	151	79	187	1874
9	MALAPPURAM	1894	2791	1311	1003	813	1411	1723	1658	1105	2054	2417	2389	20569
8	KOZHIKKODE	1399	1267	987	894	736	504	716	435	653	677	1034	1187	10489
14	WAYANAD	2484	2054	1021	381	316	331	556	525	512	809	847	1008	10844
4	KANNUR	1003	1405	813	426	170	120	184	387	193	537	647	1087	6972
5	KASARGOD	422	361	243	142	116	73	92	84	89	101	327	294	2344
TOTAL		113627	115403	85953	66371	32600	29758	45786	64518	51032	67702	83484	101909	858143

2.9. QUARTERLY COMPARISON OF FOREIGN TOURIST ARRIVALS

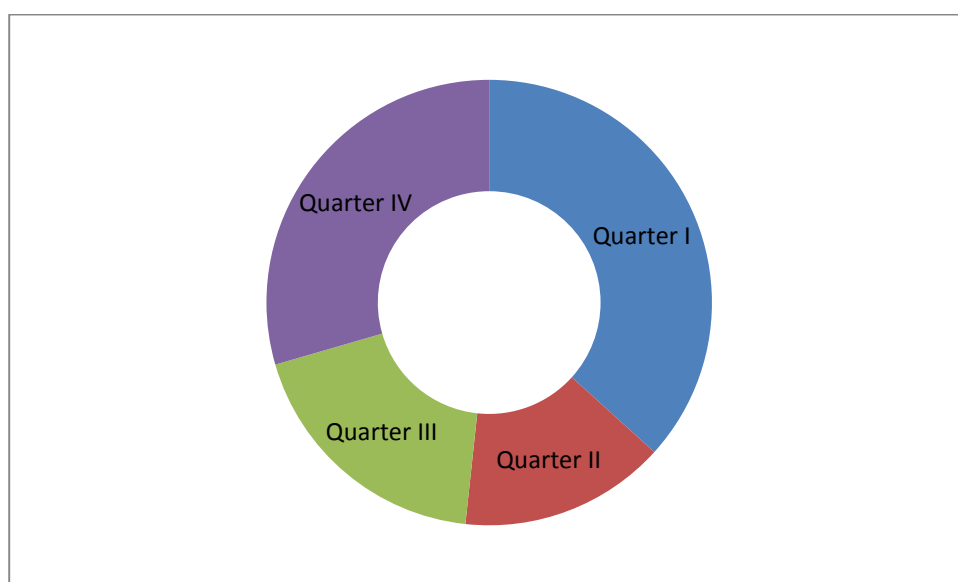
Quarterly comparison of foreign tourist arrivals shows that quarter –I is receiving highest foreign tourist arrivals, quarter IV comes second in tourist arrivals. Details are given in Table 2.9.1

2.9.1

Table 2.9.1 QUARTERLY COMPARISON OF FOREIGN TOURIST ARRIVALS

Foreign	2005	2006	2007	2008	2009	2010	2011	2012	2013
I-Quarter	118138	154972	195096	234209	206225	235634	256005	285078	314983
II-Quarter	48349	69056	73847	86464	88358	102378	112891	120085	128729
III-Quarter	62055	74287	85470	105613	97276	123565	141834	150321	161336
IV-Quarter	117957	130219	161395	172643	165399	197688	222255	238212	253095
Total	346499	428534	515808	598929	557258	659265	732985	793696	858143

Chart-2.9.1 QUARTERLY COMPARISON OF FOREIGN TOURIST ARRIVALS IN 2013



2.10 DESTINATION WISE FOREIGN TOURIST ARRIVALS IN 2013

Destination	No.of Tourist
Kovalam	169406
Kochi City	129206
Fort Kochi	101744
Varkala	58105
Alappuzha	55465
Thiruvananthapuram	52774
Not at any Destination	47669
Thekkady	46713
Munnar	43733
Kumarakom	34387
Maradu	21598
Cherai Beach	14416
Wayanad	10500
Kollam	9962
Kozhikode City	8392
Guruvayoor	8342
Iringal	7113
Kuttanadu	4999
Athirappalli	4984
Muzhuppilangad	3378
Kalady	3373
Ponmudi	3276
Poovar	2592
Meenkunnu-Payyambalam	2235
Nilambur	2182
Aluva	2158
Kappad	1649
Palaruvi	1323
Parassinikkadavu	1230
Chavakkad	1215
Kottakkal	913

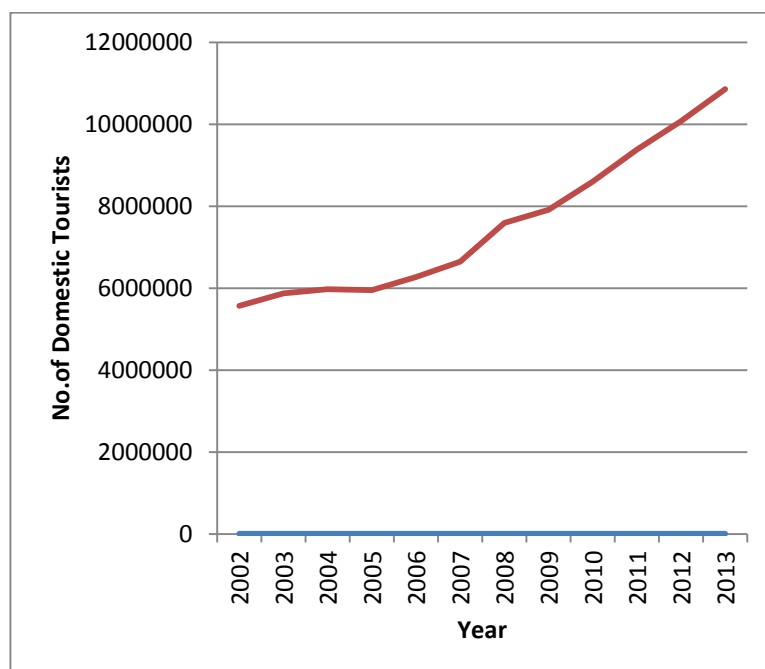
Wagamon	612
Bekal	557
Nelliampathy	510
Chalakkudi	449
Paravoor	335
Malampuzha	259
Kadalundi Nagaram	214
Aranmula	172
Erumeli	3
Total	858143

2.11. Domestic Tourist Visits in Kerala over the Years

Domestic tourist visits in Kerala during 2013 were about 1.09 crores – as compared to 1.01 crores during the previous year. The growth in domestic tourist visits during the year was 7.75 percent. There has been a moderate increase in domestic tourist visits in the previous year. The year – wise domestic tourist visits and percentage changes since 2002 are given in Table – 2.11.1.

Table – 2.11.1: Domestic Tourist Visits in Kerala During 2002 to 2013

Year	No.of Domestic Tourist Visits	% of Increase
2002	5568256	6.27
2003	5871228	5.44
2004	5972182	1.72
2005	5946423	-0.43
2006	6271724	5.47
2007	6642941	5.92
2008	7591250	14.28
2009	7913537	4.25
2010	8595075	8.61
2011	9381455	9.15
2012	10076854	7.41
2013	10857811	7.75

Chart – 2.11.1: Domestic Tourist Visits in Kerala During 2002 to 2013

2.12. Main Source Markets of Domestic Tourists

Out of 1.08 crores domestic tourist visits, 7.47 million visits (68.87 percent) were made by the Keralites. Tamil Nadu contributed 13.96 percent of the domestic tourist visits. It was followed by Karnataka with a share of 5.82 percent and Maharashtra with a share of 3.12 percent. The other major source markets are Andhra Pradesh (1.80 percent), Delhi (0.96 percent), Gujarat (0.74 percent) and Andhra Pradesh (2.94 percent). The state – wise tourist visits along with the percentage share are given in Table – 2.12.1.

Table – 2.12.1: Distribution of Domestic Tourist Visits in Kerala by State of Origin During 2013.

Sl. No.	State	No.of Tourist	Percentage share
1	Kerala	7478304	68.87
2	Tamil Nadu	1515346	13.96
3	Karnataka	631676	5.82
4	Maharashtra	338821	3.12
5	Andhra Pradesh	319366	2.94
6	Delhi	190287	1.75
7	Gujarat	72328	0.67
8	Uttar Pradesh	49960	0.46

10	Lakshadweep	48052	0.44
9	West Bengal	36392	0.34
14	Punjab	25098	0.23
11	Madhya Pradesh	21939	0.20
15	Goa	20519	0.19
13	Rajasthan	20327	0.19
12	Pondicherry	17916	0.17
17	Haryana	14589	0.13
18	Andaman and Nicobar Islands	14396	0.13
16	Bihar	10708	0.10
19	Orissa	6834	0.06
20	Assam	4907	0.05
34	Nagaland	3089	0.03
23	Jharkhand	2250	0.02
26	Chandigarh	1882	0.02
21	Himachal Pradesh	1656	0.02
24	Jammu and Kashmir	1646	0.02
25	Chhattisgarh	1564	0.01
22	Uttaranchal	1515	0.01
27	Arunachal Pradesh	1436	0.01
28	Mahe	1173	0.01
29	Tripura	971	0.01
30	Mizoram	762	0.01
31	Sikkim	671	0.01
32	Meghalaya	533	0.00
35	Manipur	490	0.00
33	Daman and Diu	319	0.00
36	Dadra and Nagar Haveli	89	0.00
Total		10857811	100.00

2.13. District – wise Distribution of Domestic Tourists

The highest share of domestic tourist visits is recorded by Ernakulam district in all the years since 2005. During 2013, the share of the district was 23.44 percent. The second largest share of domestic tourist visits is recorded in Thrissur district with share 21.79 percent . It was followed by Trivandrum and Kozhikode districts with shares of 14.33 percent and 6.71 percent respectively during 2013. The district – wise domestic tourist visits since 2005 are given in Table – 2.13.1

Table – 2.13.1: District – Wise Domestic Tourist Visits During 2005 to 2013

DISTRICT-WISE DOMESTIC TOURIST VISITS DURING 2005 To 2013											
Sl.No	DISTRICT	2005	2006	2007	2008	2009	2010	2011	2012	2013	Proportion to Total
South Kerala											
1	TVM	837211	866712	948579	1102115	1074562	1160640	1288555	1408688	1556435	14.33
2	KLM	98227	122998	145524	180943	184867	196773	210808	220849	235593	2.17
3	PTA	59328	57032	60988	59832	75660	82470	89115	96893	103276	0.95
4	ALP	173626	179115	170731	234700	164223	183416	199670	211749	225061	2.07
	Total	1168392	1225857	1325822	1577590	1499312	1623299	1788148	1938179	2120365	19.53
Central Kerala											
5	KTM	164909	196284	189411	230831	274828	301599	334747	354270	382197	3.52
6	EKM	1025944	1080591	1109644	1509686	1818748	1987743	2169426	2351631	2545573	23.44
7	IDKI	473772	515182	505229	531970	429402	464123	506990	555122	586546	5.40
8	THR	1327856	1398014	1546576	1671174	1733862	1874211	2062032	2213893	2366389	21.79
	Total	2992481	3190071	3350860	3943661	4256840	4627676	5073195	5474916	5880705	54.16
North Kerala											
9	PKD	266837	300674	315591	324399	332787	359961	383027	404017	438552	4.04
10	MLPM	306431	303844	313200	323448	319635	347311	369773	388323	419884	3.87
11	WYND	191184	225923	256190	295465	368459	408151	451184	480125	519306	4.78
12	KKD	553363	550694	570832	595985	574896	612316	650676	686395	728041	6.71
13	KNR	333855	351309	375255	395121	420922	455822	486769	517566	553899	5.10
14	KSD	133880	123352	135191	135581	140686	160539	178683	187333	197059	1.81
	Total	1785550	1855796	1966259	2069999	2157385	2344100	2520112	2663759	2856741	26.31
	Grand Total	5946423	6271724	6642941	7591250	7913537	8595075	9381455	10076854	10857811	100

Chart – 2.13.1. District Wise Proportion of Arrival of Domestic tourists

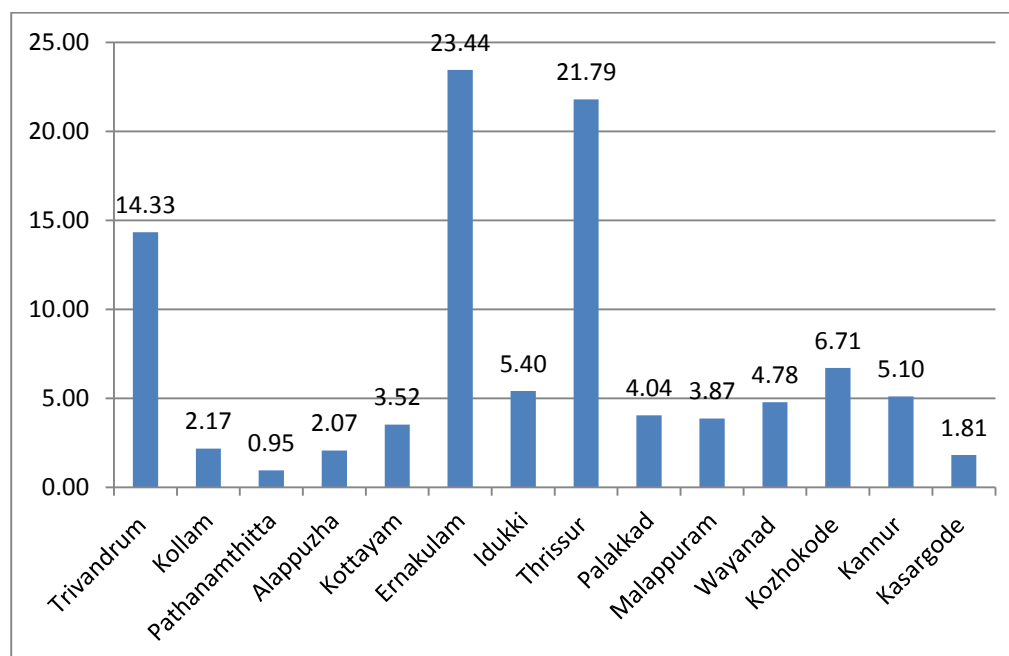
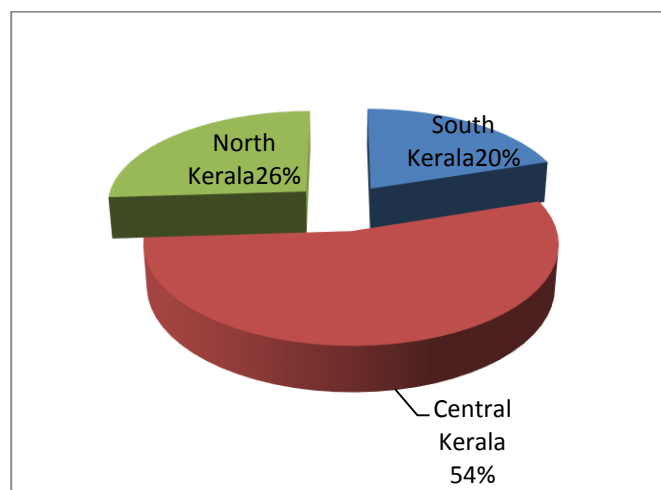


Chart – 2.13.1. Region Wise Proportion of Arrival of Domestic tourists

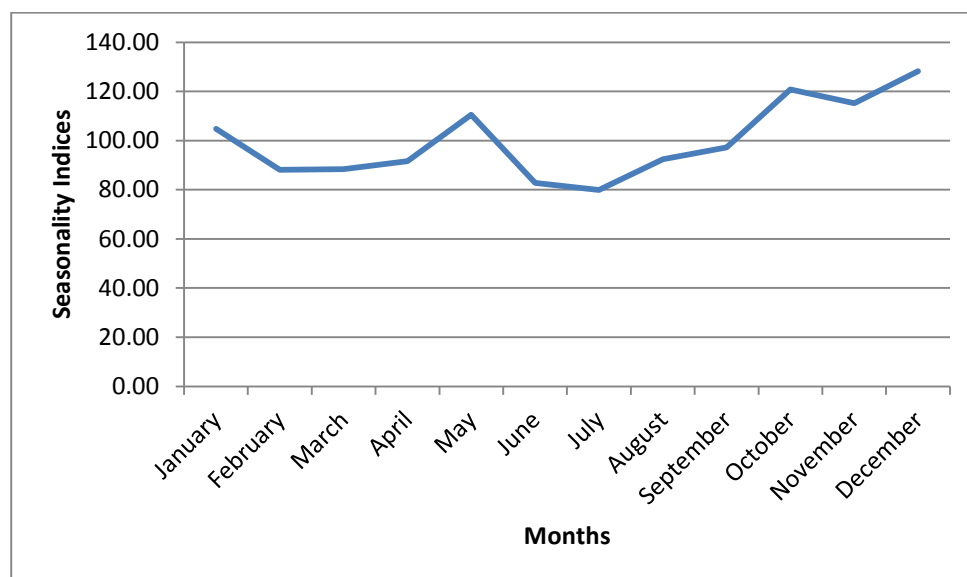


2.14. Seasonality in Domestic Tourist Visits

There is moderate seasonality in domestic tourist visits. While the peak months are October and December, the lean months are June and July. The month – wise domestic tourist visits in different years and seasonality indices are given in Table – 2.14.1

Table 2.14.1: Month wise Domestic Tourist Visits and Seasonality Indices

Sl. No.	Month	2006	2007	2008	2009	2010	2011	2012	2013	% of variation over previous year	Seasonality Indices
1	January	532748	588620	645492	696878	730803	777064	831477	913203	9.83	104.80
2	February	469363	501204	586317	600648	634454	676327	711899	771880	8.43	88.12
3	March	457435	485722	580681	635963	658610	686745	727842	779086	7.04	88.34
4	April	522408	557785	643808	649553	684522	722497	760280	813247	6.97	91.63
5	May	610241	639712	719566	730310	776648	824988	893462	986407	10.40	110.48
6	June	467879	502224	566541	569624	614955	653916	695897	744703	7.01	82.84
7	July	478701	478781	574544	552162	596335	643806	679215	724122	6.61	79.95
8	August	511198	535309	600121	585658	655937	719963	777560	842995	8.42	92.43
9	September	517659	529847	572977	609127	660903	747312	814580	892413	9.55	97.24
10	October	543876	555721	655670	738253	836517	953630	1058530	1115718	5.40	120.81
11	November	556297	618908	695118	726832	815827	913542	1002557	1072124	6.94	115.17
12	December	603919	659108	750415	818529	929564	1061665	1123555	1201913	6.97	128.19
	Total	6271724	6652941	7591250	7913537	8595075	9381455	10076854	10857811	7.75	

Chart – 2.15. Seasonality Indices of Domestic Visiting in 2013.**2.15.1 QUARTERLY COMPARISON OF DOMESTIC TOURIST ARRIVALS**

Domestic	2005	2006	2007	2008	2009	2010	2011	2012	2013
I-Quarter	1360606	1459546	1575546	1812490	1933489	2023867	2140136	2271218	2464169
II-Quarter	1508273	1600528	1699721	1929915	1949487	2076125	2201401	2349639	2544357
III-Quarter	1436227	1507558	1533937	1747642	1746947	1913175	2111081	2271355	2459530
IV-Quarter	1641317	1704092	1833737	2101203	2283614	2581908	2928837	3184642	3389755
Total	5946423	6271724	6642941	7591250	7913537	8595075	9381455	10076854	10857811

2.16. District – wise and Month – wise Statistics of Domestic Tourist Visits in 2013

Month – wise and district – wise domestic tourist visits in Kerala during 2013 are given in Table – 2.2.13. The districts of Ernakulam, Thrissur and Thiruvananthapuram received the maximum number of domestic tourist visits during the month of December. Destination wise domestic tourist visit are in the table 2.16.1.

Table 2.16.1: District – wise and Month – wise Domestic Tourist Visits in 2013

District wise Tourist Arrival Statistics -2013-Domestic														
Sl.No.	DISTRICT.	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT	OCT	NOV	DEC	TOTAL 2013
1	TRIVANDRUM	129677	122923	105005	103132	151435	95951	97778	111886	115619	146731	157538	218760	1556435
2	KOLLAM	20540	19988	18139	19316	19726	16359	17465	21292	18889	19577	20302	24000	235593
3	PATHANAMTHITTA	7551	6745	6662	10448	7334	7649	8304	8338	7909	15155	8458	8723	103276
4	ALAPPUZHA	29185	22728	17899	24165	14383	10179	11585	15863	13886	20195	18585	26408	225061
5	KOTTAYAM	35027	23534	25636	24853	32887	30793	24418	30572	37757	36705	36308	43707	382197
6	ERNAKULAM	229897	168563	178404	168143	192897	168365	183760	218561	205686	282798	270561	277938	2545573
7	IDUKKI	55879	54622	46555	56384	58338	27803	24755	36256	45378	63726	65772	51078	586546
8	THRISSUR	175708	147053	135847	190146	253828	163636	147230	170608	211781	253429	236979	280144	2366389
9	PALAKKAD	36517	32937	34118	36064	38410	42291	29249	33119	34877	43635	38323	39012	438552
10	MALAPPURAM	35675	31124	30676	33971	36783	32553	32476	35359	37931	38290	37198	37848	419884
11	KOZHIKKODE	54966	55930	57112	61376	70188	60853	55211	58507	60323	71732	61339	60504	728041
12	WAYANAD	41948	33415	46434	26974	39503	33251	36481	42220	36920	59314	57799	65047	519306
13	KANNUR	41522	38290	63150	44155	51477	41140	40769	44919	48500	46605	45565	47807	553899
14	KASARGOD	19111	14028	13449	14120	19218	13880	14841	15495	16957	17826	17397	20937	197059
	TOTAL	913203	771880	779086	813247	986407	744703	724122	842995	892413	1115718	1072124	1201913	10857811

2.17 DESTINATION WISE DOMESTIC TOURIST VISITS IN 2013

	Destination	No. of Tourist 2013
1	Thiruvananthapuram	827973
2	Kovalam	576773
3	Ponmudi	25405
4	Poovar	21970
5	Varkala	230922
6	Kollam	207962
7	Palaruvi	21170
8	Aranmula	8920
9	Erumeli	5195
10	Alappuzha	267414
11	Kuttanadu	8429
12	Kumarakom	313470
13	Munnar	368816
14	Thekkady	238057
15	Wagamon	34516
16	Aluva	205815
17	Cherai Beach	41930
18	Fort Kochi	163050
19	Kalady	30101
20	Kochi City	1105342
21	Maradu	49265
22	Paravoor	13977
23	Athirappalli	395975
24	Chalakkudi	47421

25	Chavakkad	43797
26	Guruvayoor	1972569
27	Malampuzha	142989
28	Nelliyampathy	20086
29	Kodikuthimala	2868
30	Nilambur	53722
31	Iringal	12819
32	Kottakkal	6220
33	Kakkayam	268
34	Kozhikode City	597192
35	Kappad	9457
36	Peruvannamoozhi	1159
37	Thusharagiri	646
38	Wayanad	568890
39	Meenkunnu-Payyambalam	61481
40	Muzhuppilangad	237607
41	Parassinikkadavu	201446
42	Bekal	10864
43	Not at any Destination	1702095
44	Kadalundi Nagaram	1413
45	Bhoothanthankettu	356
Total		10857811

2.18 EARNINGS FROM TOURISM

Earnings from tourism from 2001 to 2010 are given in Table 2.18.1. It can be seen that the earnings are increasing steadily over the years. Foreign exchange earnings from 2000 to 2013 are given in the table 2.18.2.

Table 2.18.1 EARNINGS FROM TOURISM IN KERALA

Year	Foreign Exchange Earnings (Rs. In Crores)	Percentage of Increase	Total revenue generated from Tourism (Direct & Indirect)Rs. In Crores	Percentage of Increase
2001	535.00	1.85	4500.00	9.58
2002	705.67	31.90	4931.00	20.42
2003	983.37	39.35	5938.00	12.83
2004	1266.77	28.82	6829.00	15.01
2005	1552.31	22.54	7738.00	13.31
2006	1988.40	28.09	9126.00	17.94
2007	2640.94	32.82	11433.00	25.28
2008	3066.52	16.11	13130.00	14.84
2009	2853.16	-6.96	13231.00	0.77
2010	3797.37	33.09	17348.00	31.12
2011	4221.99	11.18	19037.00	9.74
2012	4571.69	8.28	20430.00	7.32
2013	5560.77	21.63	22926.55	12.22

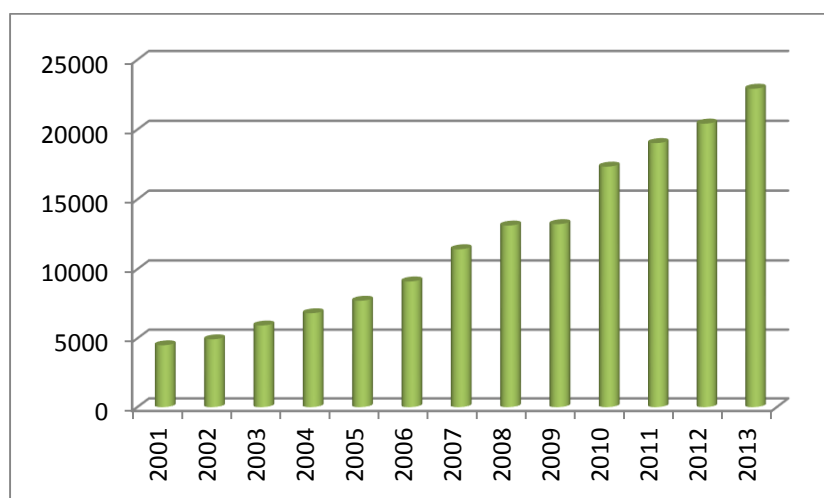
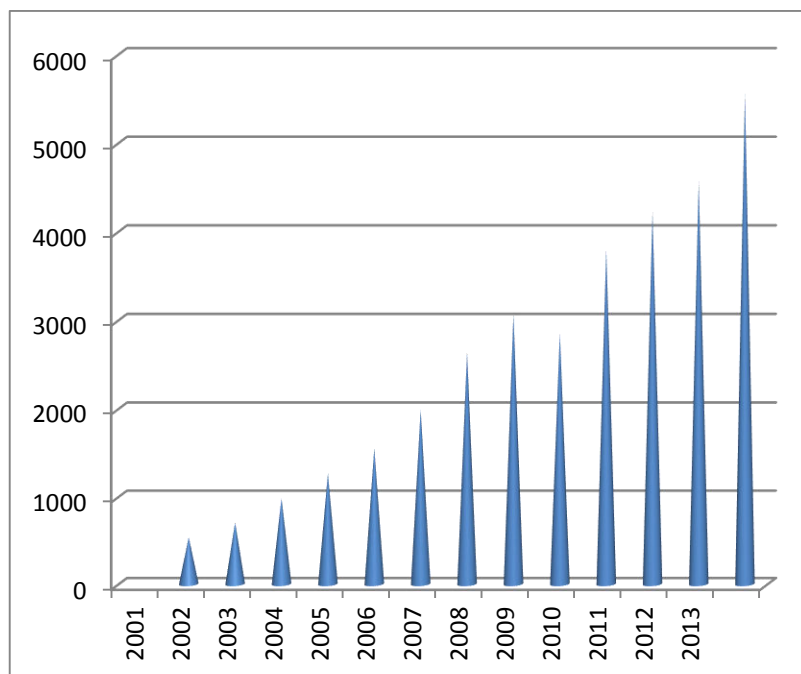
Chart 2.18.1 Total Revenue Generated From Tourism (Direct & Indirect)

Table 2.18.2 FOREIGN EXCHANGE EARNINGS FROM TOURISM DURING LAST 13 YEARS

Year	Foreign Exchange Earnings (Rs. In Crores)	Percentage of Increase
2001	535.00	1.85
2002	705.67	31.90
2003	983.37	39.35
2004	1266.77	28.82
2005	1552.31	22.54
2006	1988.40	28.09
2007	2640.94	32.82
2008	3066.52	16.11
2009	2853.16	-6.96
2010	3797.37	33.09
2011	4221.99	11.18
2012	4571.69	8.28
2013	5560.77	21.63

Chart 2.18.2 FOREIGN EXCHANGE EARNINGS FROM TOURISM DURING LAST 13 YEARS

CHAPTER 3



Inbound Tourism – Foreign Tourist Arrivals in India

3.1.INBOUND TOURISM - TOURIST ARRIVALS IN INDIA

TABLE 3.1.1
STATE /UT WISE DOMESTIC AND FOREIGN TOURIST VISITS IN INDIA
DURING THE YEARS 2012 & 2013

Sl. No.	State/U.T.	2012		2013	
		Domestic	Foreign	Domestic	Foreign
1	Andhra Pradesh	207,217,952	292,822	152,102,150	223,518
2	Arunachal Pradesh	132,243	5135	125,461	10846
3	Assam	4,511,407	17,543	4,684,527	17,638
4	Bihar	21,447,099	1,096,933	21,588,306	765,835
5	Chhattisgarh	15,036,530	4,172	22,801,031	3886
6	Goa	2,337,499	450,530	2,629,151	492,322
7	Gujarat	24,379,023	174,150	27,412,517	198,773
8	Haryana	6,799,242	233,002	7,128,027	228,200
9	Himachal Pradesh	15,646,048	500,284	14,715,586	414,249
10	Jammu & Kashmir	12,427,122	78,802	13,642,402	60,845
11	Jharkhand	20,421,016	31,909	20,511,160	45,995
12	Karnataka	94,052,729	595,359	98,010,140	636,378
13	Kerala	10,076,854	793,696	10,857,811	858,143
14	Madhya Pradesh	53,197,209	275,930	63,110,709	280,333
15	Maharashtra	74,816,051	2,651,889	82,700,556	4,156,343
16	Manipur	134,541	749	140,673	1908
17	Meghalaya	680,254	5,313	691,269	6,773
18	Mizoram	64,249	744	63,377	800
19	Nagaland	35,915	2,489	35,638	3304
20	Odisha	9,052,871	64,719	9,800,135	66,675
21	Punjab	19,056,143	143,805	21,340,888	204,074
22	Rajasthan	28,611,831	1,451,370	30,298,150	1,437,162
23	Sikkim	558,538	26,489	576,749	31,698
24	Tamil Nadu	184,136,840	3,561,740	244,232,487	3,990,490
25	Tripura	361,786	7,840	359,586	11,853
26	Uttarakhand	26,827,329	124,555	19,941,128	97,683
27	Uttar Pradesh	168,381,276	1,994,495	226,531,091	2,054,420
28	West Bengal	22,730,205	1,219,610	25,547,300	1,245,230
29	Andaman & Nicobar Islands	238,699	17,538	243,703	14,742
30	Chandigarh	924,589	34,130	936,922	40,124
31	Daman & Diu	803,963	4,607	819,947	4,814
32	Delhi	18,495,139	2,345,980	20,215,187	2,301,395
33	Dadra & Nager Haveli	469,213	1234	481,618	1,582
34	Lakshadweep	4,417	580	4,784	371
35	Puducherry	981,714	52,931	1,000,277	42,624
TOTAL		1,045,047,536	18,263,074	1,145,280,443	19,951,026

Source:- India Tourism Statistics 2013

3.2 FOREIGN TOURIST ARRIVALS IN INDIA

Foreign tourist arrivals in India, which was 1.28 million in 1981, have reached a level of 6.97 million in 2013. The foreign tourist arrivals in India during 2013 were 6.97 million as compared to 6.58 million in 2012. During the year 2013, India witnessed a growth of 5.9% over 2012 in foreign tourist arrivals.

Table 3.2.1 gives the number of foreign tourist arrivals in India in the years 1981 to 2013 and the percentage change over previous year. The country-wise details of foreign tourist arrivals in India during 2004 to 2013 are given in Table 3.2.2.

TABLE 3.2.1

FOREIGN TOURIST ARRIVALS IN INDIA, 1981-2013

Year	Foreign Tourist Arrivals	Annual Growth %
1981	1279210	2.0
1982	1288162	0.7
1983	1304976	1.3
1984	1193752	-8.5
1985	1259384	5.5
1986	1451076	15.2
1987	1484290	2.3
1988	1590661	7.2
1989	1736093	9.1
1990	1707158	-1.7
1991	1677508	-1.7
1992	1867651	11.3

1993	1764830	-5.5
1994	1886433	6.9
1995	2123683	12.6
1996	2287860	7.7
1997	2374094	3.8
1998	2358629	-0.7
1999	2481928	5.2
2000	2649378	6.7
2001	2537282	-4.2
2002	2384364	-6.0
2003	2726214	14.3
2004	3457477	26.8
2005	3918610	13.3
2006	4447167	13.5
2007	5081504	14.3
2008	5282603	4.0
2009	5167699	-2.2
2010	5775692	11.8
2011	6309222	9.2
2012	6577745	4.3
2013	6967601	5.9

TABLE 3.2.2

**LEAN AND PEAK MONTHS OF FOREIGN TOURIST ARRIVALS IN INDIA
DURING 2013 FROM TOP 15 COUNTRIES**

Sl. No.	Nationality	Lean Month	Peak Month
1	U.S.A	September	December
2	U.K.	June	December
3	Bengladesh	April	October
4	Sri Lanka	May	August
5	Russian Fed	June	December
6	Canada	May	December
7	Germany	June	March
8	France	May	February
9	Malaysia	April	November
10	Japan	May	November
11	Australia	June	December
12	China(Main)	June	December
13	Singapore	April	December
14	Thailand	September	December
15	Nepal	June	October

Source:- Bureau of Immigration, India Tourism Statistics 2013

It may be seen from Table 3.2.2 that the no. of foreign tourist arrivals in India in 2013 was maximum during the winter season (October- December) and minimum during the summer season (April-June).

3.3. MODE OF TRAVEL

Out of the 6.97 million foreign tourist arrivals in India in 2013, a majority (91.0%) arrived by air, followed by land (8.5%) and sea (0.5%). The corresponding figures for 2012 were 91.7%, 7.6% and 0.7% respectively. Table 3.3.1.shows the foreign tourist arrivals in India via air, land and sea during 1996-2013. It may be seen that air travel has been the prominent mode of travel for the foreign tourist arrivals over the years accounting for above 80% share in each during this period.

TABLE 3.3.1.

FOREIGN TOURIST ARRIVALS IN INDIA ACCORDING TO MODE OF TRAVEL, 1996-2013

% Distribution by mode of travel				
Year	Arrivals	Air	Sea	Land
1996	1923695	98.5	0.1	1.4
1997	1973647	98.5	0.0	1.5
1998	1974815	98.5	0.0	1.5
1999	2025031	98.4	0.0	1.6
2000	2152926	98.5	0.0	1.5
2001	2537282	87.1	0.9	12.0
2002	2384364	81.9	0.6	17.5
2003	2726214	83.1	0.5	16.4
2004	3457477	85.6	0.5	13.9
2005	3918610	86.5	0.4	13.1
2006	4447167	87.1	0.6	12.3
2007	5081504	88.4	0.6	11.0
2008	5282603	89.1	0.7	10.2
2009	5167699	89.8	1.0	9.2
2010	5775692	91.8	0.7	7.5
2011	6309222	92.0	0.8	7.2
2012	6577745	91.7	0.7	7.6
2013	6967601	91.0	0.5	8.5

Source:- Bureau of Immigration, India Tourism Statistics 2013

3.4. PORT OF ENTRY

During 2013, the maximum number of foreign tourist arrivals was registered at Delhi airport (33.0%), followed by Mumbai airport (19.8%), Chennai airport (9.8%), Bangalore airport (6.5%) and Kolkata airport (3.6%). The corresponding figures for Delhi, Mumbai, Chennai ,Bangluru and Kolkata airports in 2012 were 35.7%, 19.2%, 10.8%,6.3% and 3.4% respectively. The 5 metro airports i.e. Delhi,

Mumbai, Chennai and Kolkata accounted for 72.7% of total foreign tourist arrivals in India in 2013, as compared to 75.4% in 2012.

The following Table 3.4.1 gives the percentage of foreign tourist arrivals in India in 5 major airports during 1996-2013. It is clear from the table that, during this period Delhi airport remained number one airport in terms of arrivals followed by Mumbai airport.

TABLE 3.4.1

**FOREIGN TOURIST ARRIVALS IN INDIA THROUGH
MAJOR PORTS, 1996-2013**

Year	Arrivals	% of Arrivals in					
		Mumbai Airport	Kolkata Airport	Chennai Airport	Delhi Airport	Bengaluru Airport	Others Airport
1996	1923695	29.3	2.9	11.3	35.1	-	21.4
1997	1973647	33.6	3.4	13.1	39.7	-	10.2
1998	1974815	33.4	3.4	12.7	39.9	-	10.6
1999	2025031	33.5	3.4	13.6	38.6	-	10.9
2000	2152926	34.0	3.5	13.8	38.2	-	10.5
2001	2537282	26.7	4.4	12.0	33.7	-	23.2
2002	2384364	25.4	3.9	11.5	28.6	-	30.6
2003	2726214	24.1	3.7	10.5	30.8	-	30.9
2004	3457477	25.1	3.3	10.3	32.2	-	29.1
2005	3918610	24.4	3.0	9.9	31.	-	30.9
2006	4447167	23.3	2.8	9.8	32.0	-	32.1
2007	5081504	23.8	3.0	10.3	31.4	-	31.5
2009	5167699	21.5	3.6	10.7	32.2	6.3	25.7
2010	5775692	20.5	3.7	10.7	34.4	6.5	24.2
2011	6309222	19.7	3.7	10.8	35.8	6.3	23.7
2012	6577745	19.2	3.4	10.8	35.7	6.3	24.6
2013	6967601	19.8	3.6	9.8	33.0	27.3	6.5

Source:- Bureau of Immigration India Tourism Statistics 2013

TABLE 3.4.2.

**FOREIGN TOURIST ARRIVALS IN INDIA ACCORDING TO
GENDER, 1996-2013**

Year	Arrivals	Gender Distribution (%)		
		Male	Female	Not Reported
1996	1923695	65.3	34.7	0.0
1997	1973647	61.5	38.5	0.0
1998	1974815	65.4	34.6	0.0
1999	2025031	69.5	30.5	0.0
2000	2152926	61.9	38.1	0.0
2001	2537282	41.1	24.5	34.4
2002	2384364	50.2	27.5	22.3
2003	2726214	55.7	32.1	12.2
2004	3457477	54.9	33.9	11.2
2005	3918610	52.5	33.1	14.4
2006	4447167	57.1	36.2	6.7
2007	5081504	59.9	39.6	0.5
2008	5282603	60.5	39.4	0.1
2009	5167699	59.6	40.4	0.0
2010	5775692	59.3	40.7	0.0
2011	6309222	59.4	40.63	0.0
2012	6577745	58.7	41.3	0.0
2013	6967901	58.8	41.2	0.0

Source: Bureau of Immigration India Tourism Statistics 2013

3.5. CLASSIFICATION ACCORDING TO AGE-GROUP

Age group wise classification of the foreign tourist arrivals in India in 2013 shows that, maximum tourists (21.0%) were from 35-44 year age group followed by 45-54 year (20.0%), 25-34 year (19.1%) and minimum in the age-group 65 year and above (7.7%). The figure for 2012 was maximum for the age group 35-44 year (21.0%)

followed by 45-54 year (19.7%), 25-34 year (16.5%), and minimum in the age-group 15-24 year (8.0%).

The Table 3.5.1 gives the percentage distribution of foreign tourist arrivals in India during 1996-2013. It may be seen from this table that the proportion of foreign travelers in different age groups has not changed much in the last 5-6 years.

TABLE 3.5.1.

**FOREIGN TOURIST ARRIVALS IN INDIA ACCORDING TO
AGE- GROUP, 1996 TO 2013**

Year	Arrivals	% Distribution by Age- Group (in years)*							Not Reported
		0-14	15-24	25-34	35-44	45-54	55-64	65 and Above	
1996	1923695	12.6	9.1	21.7	26.8	18.3	8.8	2.7	-
1997	1973647	9.9	10.1	23.4	26.9	18.9	8.2	2.0	0.6
1998	1974815	5.0	16.8	23.8	26.0	18.2	8.3	1.9	-
1999	2025031	3.1	14.0	23.4	27.5	20.8	9.2	2.0	-
2000	2152926	3.9	11.4	22.6	27.0	23.1	9.9	2.1	-
2001	2537282	7.0	10.8	20.1	21.1	19.4	11.9	6.7	3.0
2002	2384364	9.2	10.0	19.4	21.6	19.4	11.5	7.7	1.2
2003	2726214	7.2	10.0	19.5	21.6	19.4	11.5	7.7	3.1
2004	3457477	8.5	9.8	18.8	21.3	19.4	12.8	8.2	0.2
2005	3918610	8.6	9.6	18.8	21.3	19.5	13.0	8.7	0.5
2006	4447167	9.6	8.7	18.3	21.4	19.6	13.5	7.0	1.9
2007	5081504	9.2	8.6	18.0	21.0	19.6	13.9	7.5	2.2
2008	5282603	7.5	7.1	15.2	17.1	16.1	11.9	6.5	18.6
2009	5167699	9.1	7.9	17.9	20.3	19.6	14.7	8.5	2.0
2010	5775692	10.0	8.3	17.4	21.1	19.9	13.8	9.5	0.0
2011	6309222	10.5	7.9	16.6	21.2	19.7	13.7	10.5	0.0
2012	6577745	11.0	8.0	16.5	21.0	19.7	13.9	9.9	0.0
2013	6967901	9.5	8.7	19.1	21.0	20.0	14.0	7.7	0.0

Source:- Bureau of Immigration, India Tourism Statistics 2013

3.6. PURPOSE OF VISIT

About 30.3% of foreign tourist arrivals in India during 2013 were for the purpose of leisure, holiday and recreation followed by the purpose of visiting friends and relatives (25.9%) and business and professional (20.9%) while 1.9% were for education.

TABLE 3.6.4.

FOREIGN TOURIST ARRIVALS IN INDIA ACCORDING TO PURPOSE OF VISIT, 2009 TO 2013

Year	Arrivals	Business & Profession	Leisure, Holiday & Recreation	Visiting Friends & Relatives	Medical Treatment	Education	Others
2009	5167699	15.1	57.5	17.6	2.2	-	7.
2010	5775692	18.6	24.0	27.5	2.7	-	27.2
2011	6309222	22.5	26.0	24.9	2.2	-	24.3
2012	6577745	22.5	27.1	27.2	2.6	-	20.6
2013	6967601	20.9	30.3	25.9	3.4	1.9	17.6

3.7. NATIONALITY-WISE ARRIVALS AND TOP 15 MARKETS FOR INDIA

The share of foreign tourist arrivals from top 15 countries during the year 2013 was 70.72% as compared to 71.37% in 2012. Arrivals from all the top 15 tourist generating countries for India registered positive growth during 2012, as compared to 2013. Foreign tourist arrivals in India from USA were highest (15.58%) during 2013, followed by United Kingdom (11.62%), Bangladesh (7.53%), Sri Lanka (3.77%), Russian Fed (3.72%), Canada (3.66%) Table 3.7.1 gives the percentage share and rank of top 15 source countries for India during 2012 and 2013.

TABLE 3.7.1.

TOP 15 SOURCE COUNTRIES FOR FOREIGN TOURIST

ARRIVALS IN INDIA DURING 2012& 2013

Rank	Country	2012 Arrivals	Tourist % Share	Country	2013 Arrivals	Tourist % Share
1	USA	1039947	15.81	USA	1085309	15.58
2	UK	788170	11.98	UK	809444	11.62
3	Bangladesh	487397	7.41	Bangladesh	524923	7.53
4	Sri Lanka	296983	4.51	Sri Lanka	262345	3.77
5	Canada	256021	3.89	Russian fed.	259120	3.72
6	Germany	254783	3.87	Canada	255222	3.66
7	France	240674	3.66	Germany	252003	3.62
8	Japan	220015	3.34	France	248379	3.56
9	Australia	202105	3.07	Malaysia	242649	3.48
10	Malaysia	195853	2.98	Japan	220283	3.16
11	Russian Fed	77526	2.70	Australia	218967	3.14
12	China(Main)	168952	2.57	China(Main)	174712	2.51
13	Singapore	131452	2.00	Singapore	143025	2.05
14	Nepal	125375	1.91	Thailand	117136	1.68
15	Rep.of Korea	109469	1.66	Nepal	113790	1.63

Top 15 Countries 4694722 71.37 Top 15 Countries 4927307 70.72

Others 1883023 28.63 Others 2040294 29.28

All Countries 6577745 100.00 All countries 6969601 100.00

Source:- Bureau of Immigration, India Tourism Statistics 2013

TABLE 3.7.2.
FOREIGN TOURIST ARRIVALS IN INDIA DURING 1981 TO 2013
FROM TOP 15 SOURCE COUNTRIES OF 2013

Year	USA	UK	Bangladesh	Srilanka	Russian Fed.	Canada	Germany	France
	1	2	3	4	5	6	7	8
2000	348292	432644	414437	129197	34814	84013	83881	100022
2001	329147	405472	431312	112813	15154	88600	80011	102434
2002	348182	387846	435867	108008	18643	93598	64891	78194
2003	410803	430917	454611	109098	26948	107671	76868	97654
2004	526120	555907	477446	128711	47077	135884	116679	131824
2005	611165	651803	456371	136400	56446	157643	120243	152258
2006	696739	734240	484401	154813	62203	176567	156808	175345
2007	799062	796191	480240	204084	75543	208214	184195	204827
2009	827140	769251	468899	239995	94945	224069	191616	196462
2010	931292	759494	431962	266515	122048	242373	227720	225232
2011	980688	798249	463543	305853	144312	259017	240235	231423
2012	1039947	788170	487397	296983	256021	254783	240674	177526
2013	1085309	809444	524923	262345	259120	255222	252003	248379

Table 3.7.2.continued.....

Year	Malaysia	Japan	Australia	China(main)	Singapore	Thailand *	Nepal
	9	10	11	12	13	14	15
2000	60513	98159	53995	14420	46612	N.A	38801
2001	57869	80634	52691	13901	42824	18623	41135
2002	63748	59709	50743	15400	44306	19649	37136
2003	70750	77996	58730	21152	48368	25754	42771
2004	84390	96851	81608	34100	60710	33442	51534
2005	96276	103082	96258	44897	68666	41978	77024
2006	107286	119292	109867	62330	82574	46623	91552
2007	112741	145538	135925	88103	92908	50037	83037
2008	115794	145352	146209	98093	97851	58065	78133
2009	135343	124756	149074	100209	95328	67309	88785
2010	179077	168019	169647	119530	107487	76617	104374
2011	208196	193525	192592	142218	449022	92404	119131
2012	19853	220015	202105	168952	131452	105141	125375
2013	242649	220283	218967	174712	143025	117136	113790

Source: Bureau of Immigration & India Tourism Statistics 2013

TABLE 3.7.3
FOREIGN EXCHANGE EARNINGS OF INDIA FROM
TOURISM DURING 1999-2013

Year	FEE in INR terms		FEE in US\$ terms	
	Rs. Crores	% change over previous year	US \$ Million	% change over previous year
1999	12951	6.6	3009	2.1
2000	15626	20.7	3460	15
2001	15083	-3.5	3198	-7.6
2002	15064	-0.1	3103	-3
2003	20729	37.6	4463	43.8
2004	27944	34.8	6170	38.2
2005	33123	18.5	7493	21.4
2006	39025	17.8	8634	15.2
2007	44360	13.7	10729	24.3
2008	51294	15.6	11832	10.3
2009	54960	7.1	11394	-3.7
2010	64889	18.1	14193	24.6
2011	77591	19.6	16564	16.7
2012	94487	21.8	17737	7.1
2013	107671	14	18445	4

Revised Estimates

The foreign Exchange Earnings (FEE) from tourism in India in 2013 was Rs. 107671 crores .In US\$ terms it was 18445 millions

The month-wise foreign exchange earnings from tourism and corresponding percentage change over previous years during 2011-2013 in INR terms and US\$ terms are given in Tables 3.7.4 and 3.7.5.

TABLE 3.7.4.**MONTH-WISE FOREIGN EXCHANGE EARNINGS FROM TOURISM****(IN RS. CRORE) DURING 2011 ,2012 AND 2013**

Month	Foreign Exchange Earnings (Rs.Crores)			Percentage Change	
	2011	2012	2013	2012/11	2013/12
January	5777	8623	10785	49.3	25.1
February	7653	8502	10255	11.1	20.6
March	5522	7843	9545	42.0	21.7
April	5724	6745	7226	17.8	7.1
May	5047	5562	6627	10.2	19.1
June	5440	6485	7149	19.2	10.2
July	7116	8389	8620	17.9	2.8
August	5734	7260	8351	26.6	15.0
September	5748	6652	7811	15.7	17.4
October	7019	8154	8645	16.2	6.0
November	7941	9723	10663	22.4	9.7
December	8870	10549	11994	18.9	13.7
Total	77591	94487	107671	21.8	14.0

#Revised Estimates

TABLE 3.7.5.**MONTH-WISE FOREIGN EXCHANGE EARNINGS FROM TOURISM****(IN MILLION US\$) DURING 2011-2013**

Month	Foreign Exchange Earnings (In US\$billion)			Percentage Change	
	2011	2012	2013	2012/11	2013/12
January	1.273	1.681	1.984	32.1	18.0
February	1.684	1.729	1.906	2.7	10.2
March	1.227	1.559	1.755	27.1	12.6
April	1.290	1.305	1.329	1.2	1.8
May	1.124	1.023	1.207	-9.0	18.
June	1.213	1.158	1.227	-4.5	6.0
July	1.603	1.512	1.442	-5.7	-4.6
August	1.264	1.306	1.328	3.3	1.7
September	1.208	1.219	1.224	0.9	0.4
October	1.424	1.538	1.404	8.0	-8.7
November	1.566	1.776	1.703	13.4	-4.1
December	1.688	1.931	1.936	14.4	0.3
Total	16.564	17.737	18.445	7.1	4.0

Revised Estimates

Source:India Tourism Statistics 2013

CHAPTER 4



World Tourism Scenario and India's Position in World

4.1 WORLD TOURIST TRAFFIC

International tourist arrivals worldwide registered a growth of 4.8% during the year 2013 as compared to 4.1% during 2012 and 5.1% during 2011. The total international tourist arrivals in 2013 was 1087 million. France is the top most country in terms of arrivals in 2013 with USA, China, Spain, Italy, Turkey ,UK and Germany in 2nd, 3rd, 4th, 5th, 6th and 7th positions respectively.

TABLE 4.1.1.

FOREIGN TOURIST ARRIVALS IN INDIA AND WORLD, 1996-2013

Year						Rank of India
1996	2.29	8.0	572.4	6.3	0.40	-
1997	2.37	3.5	596.0	4.1	0.40	-
1998	2.36	-0.4	614.3	3.1	0.39	47th
1999	2.48	5.1	637.4	3.8	0.39	46th
2000	2.65	6.9	684.7	7.4	0.38	50th
2001	2.54	-4.2	684.4	-0.0	0.36	51st
2002	2.38	-6.3	704.7	3.0	0.34	54th
2003	2.73	14.7	692.2	-1.8	0.39	51st
2004	3.46	26.7	761.4	10.3	0.46	44th
2005	3.92	13.3	803.0	4.7	0.49	43st
2006	4.45	13.5	846.0	6.0	0.53	44nd
2007	5.08	14.3	894.0	5.7	0.57	41nd
2008	5.28	4.0	917.0	2.6	0.58	41nd
2009	5.17	-2.2	883.0	-3.7	0.59	41nd
-2010	5.78	11.8	948.0	7.4	0.61	42nd
2011	6.31	9.2	997.0	5.1	0.63	39nd
2012	6.58	4.3	1037.0	4.1	0.63	41nd
2013	6.97	5.9	1087.0	4.8	0.64	42nd

Source:- Bureau of Immigration , World Tourism Organization & India Tourism Statistics 2013

TABLE 4.1.2.

**COUNTRIES WHICH ARE ABOVE INDIA IN TERMS OF TOURIST ARRIVALS,
2011-2013**

2011			2012			2013		
Rank	Nationality	Tourist Arrivals (millions)	Rank	Nationality	Tourist Arrivals (millions)	Rank	Nationality	Tourist Arrivals (millions)
1	France	81.6	1	France	83.1	1	France	84.7
2	United States	62.7	2	United States	66.7	2	United States	69.8
3	China	57.6	3	China	57.7	3	China	55.7
4	Spain	56.2	4	Spain	57.5	4	Spain	60.7
5	Italy	46.1	5	Italy	46.4	5	Italy	47.7
6	Turkey	34.7	6	Turkey	35.7	6	Turkey	37.8
7	United Kingdom	29.3	7	Germany	30.4	7	Germany	31.5
8	Germany	28.4	8	United Kingdom	29.3	8	United Kingdom	31.2
9	Malaysia	24.7	9	Russian Fed	25.7	9	Russian Fed	28.4
10	Mexico	23.4	10	Malaysia	25.0	10	Thailand	26.5
11	Austria	23.0	11	Austria	24.2	11	Malaysia	25.7
12	Russian Fed	22.7	12	Hongkong (China)	23.8	12	Hongkong (China)	25.7
13	Hongkong (China)	22.3	13	Mexico	23.4	13	Austria	24.8
14	Ukraine	21.4	14	Ukraine	23.0	14	Ukraine	24.7
15	Thailand	19.2	15	Thailand	22.4	15	Mexico	24.2
16	Saudi Arabia	17.5	16	Canada	16.3	16	Greece	17.9
17	Greece	16.4	17	Greece	15.5	17	Canada	16.6
18	Canada	16.0	18	Poland	14.8	18	Poland	15.8
19	Poland	13.4	19	Saudi Arabia	14.3	19	Macao (China)	14.3
20	Macao (China)	12.9	20	Macao (China)	13.6	20	Saudi Arabia	13.2
21	Netherlands	11.3	21	Netherlands	12.2	21	Netherlands	12.8
22	Singapore	10.4	22	Sweden	12.2	22	Korea of Rep.	12.2
23	Hungary	10.3	23	Egypt	11.2	23	Singapore	11.9
24	Sweden	10.0	24	Korea of Rep.	11.1	24	Sweden	11.6
25	Croatia	9.9	25	Singapore	11.1	25	Croatia	11.0
26	Korea of Rep.	9.8	26	Croatia	10.4	26	Hungary	10.7
27	Egypt	9.5	27	Hungary	10.4	27	Japan	10.4
28	Morocco	9.3	28	Morocco	9.4	28	Morocco	10.0
29	Czech Rep.	9.0	29	South Africa	9.2	29	UAE	10.0
30	Switzerland	8.5	30	UAE	9.0	30	South Africa	9.5
31	South Africa	8.3	31	Czech Rep.	8.9	31	Egypt	9.2
32	UAE	8.1	32	Switzerland	8.6	32	Czech Rep.	9.0

33	Indonesia	7.6	33	Denmark	8.4	33	Switzerland	9.0
34	Ireland	7.6	34	Japan	8.4	34	Indonesia	8.8
35	Belgium	7.5	35	Indonesia	8.8	35	Denmark	8.6
36	Portugal	7.4	36	Portugal	7.7	36	Portugal	8.3
37	Denmark	7.4	37	Belgium	7.6	37	Taiwan	8.0
38	Bulgaria	6.3	38	Ireland	7.6	38	Ireland	NA
39	India	6.3	39	Taiwan	7.3	39	Belgium	7.6
40	Vietnam	6.8	40	Vietnam	7.6			
41	India	6.6	41	Bulgaria	6.9			
42	India	6.97						

Source: World Tourism Organisation & India Tourism Statistics 2013

4.2 INTERNATIONAL TOURISM RECEIPTS

TABLE 4.2.1.

INTERNATIONAL TOURISM RECEIPTS WORLDWIDE AND BY REGIONS, 2011-2013 (RECEIPTS IN BILLION US \$)

Region World	2011	2012	2013
Receipts	1,042.00	1,115.0	1,195.0
% Annual Change	12.0	7.0	7.2
Africa			
Receipts	32.7	34.4	34.7
% Annual Change	-0.4	5.2	0.9
% Share in World	3.1	3.1	2.9
Americas			
Receipts	197.9	249.1	264.4
% Annual Change	3.7	25.9	6.1
% Share in World	19.0	22.3	22.1
Asia & the Pacific			
Receipts	298.6	329.0	359.2
% Annual Change	6.6	7.5	11.9
% Share in World	28.7	28.8	30.1
Europe			
Receipts	466.7	454.1	490.1

% Annual Change	6.4	-2.7	7.9
% Share in World	44.8	40.7	41.0
Middle East			
Receipts	46.4	48.0	46.7
% Annual Change	-4.2	3.4	-2.7
% Share in World	4.5	4.3	3.9
India			
Receipts	16.56	17.74	18.44
% Annual Change	9.2	7.1	3.9
% Share in World	1.59	1.59	1.54

* Provisional Source: World Tourism Organization & India Tourism Statistics 2013

TABLE 4.2.2

**INTERNATIONAL TOURISM RECEIPTS AND INDIA'S SHARE AND RANK,
1997-2013**

Year	World travel receipts (US \$ Billion)	Travel receipts India in (US \$ billion)	Percentage Share of India	Rank of India
1997	442.8	2.89	0.65	—
1998	444.8	2.95	0.66	34 th
1999	458.2	3.01	0.66	35 th
2000	475.3	3.46	0.73	36 th
2001	463.8	3.20	0.69	36 th
2002	481.9	3.10	0.64	37 th
2003	529.3	4.46	0.84	37 th
2004	633.2	6.17	0.97	26 th
2005	679.6	7.49	1.10	22 nd
2006	744.0	8.63	1.16	22 nd
2007	857.0	10.73	1.25	22 nd
2008	939.0	11.83	1.26	22 nd
2009	853.0	11.13	1.31	20 th
2010	931.0	14.19	1.52	18 th
2011	1042.0	16.56	1.59	18 th
2012	1115.0	17.74	1.59	16 th
2013	1195.0	18.44	1.54	16 th

* Revised Estimates

Source: World Travel Receipts–World Tourism Organization & India Tourism Statistics 2013

TABLE 4.2.3
COUNTRIES WHICH ARE ABOVE INDIA IN TERMS OF TOURISM RECEIPTS,
2011-2013

2011			2012			2013		
Rank	Nationality	Tourism Receipts (US\$ billion)	Rank	Nationality	Tourism Receipts (US\$ billion)	Rank	Nationality	Tourism Receipts (US\$ billion)
1	USA	115.6	1	USA	161.2	1	USA	173.1
2	Spain	59.9	2	Spain	56.3	2	Spain	60.4
3	France	54.8	3	France	53.7	3	France	56.7
4	China	48.5	4	China	50.0	4	China	51.7
5	Italy	43.0	5	Macao (China)	43.7	5	Macao (China)	51.6
6	Germany	38.9	6	Italy	41.2	6	Italy	43.9
7	Macao (China)	38.5	7	Germany	38.1	7	Thailand	42.1
8	UK	35.1	8	UK	36.2	8	Germany	41.2
9	Australia	31.5	9	Malaysia	20.2	9	UK	40.6
10	Hong Kong (China)	27.7	10	Hong Kong (China)	33.1	10	Hong Kong (China)	38.9
11	Thailand	27.2	11	Australia	31.7	11	Australia	31.1
12	Turkey	25.1	12	Turkey	25.3	12	Turkey	28.0
13	Austria	19.9	13	Malaysia	20.2	13	Malaysia	21.5
14	Malaysia	19.7	14	Singapore	18.9	14	Austria	20.1
15	Singapore	18.1	15	Austria	18.9	15	Singapore	19.1
16	Switzerland	17.5	16	India	17.7	16	India	18.4
17	Canada	16.8	17					
18	India	16.6	18					

Source:- World Tourism Organization & India Tourism Statistics 2013

CHAPTER 5



Outbound Tourism- Indian Nationals Going Abroad

5.1. OUTBOUND TOURISM- INDIAN NATIONALS

GOING ABROAD

The total count of departures of Indian nationals to other countries for the years 1991 to 2013 compiled by the Bureau of Immigration (BOI) from Embarkation cards are given in Table 5.1.1. While the annual growth rate of outbound Indians during the years 1991 and 2013 did not follow any consistent pattern, it shows an increasing trend since 2001. The port-wise number of departures of Indian nationals from 2006 to 2013, presented in Table 5.1.2, shows that maximum number of Indians went abroad from Mumbai Airport (22.46%), followed by Delhi (21.16 %) and Chennai (10.41%).

TABLE 5.1.1

STATISTICS OF INDIAN NATIONAL GOING ABROAD, 1991 TO 2013

Year	No. of Outbound Indians	Percentage change over the previous year
1991	1942707	-14.8 %
1992	2161301	11.3 %
1993	2733304	26.5%
1994	2734830	0.1 %
1995	3056360	11.8 %
1996	3463783	13.3 %
1997	3725820	7.6 %
1998	3810908	2.3 %
1999	4114820	8.0%
2000	4415513	7.3 %
2001	4564477	3.4 %
2002	4940244	8.2 %
2003	5350896	8.3 %
2004	6212809	16.1 %
2005	7184501	15.6 %
2006	8339614	16.1 %
2007	9783232	17.3%
2008	10867999	11.1%

2009	11066072	1.8%
2010	12988001	17.4%
2011	13994002	7.7%
2012	14924755	6.75%
2013	16626316	11.4%

Source:-Bureau of Immigration

TABLE 5.1.2.

PORT-WISE DEPARTURES OF INDIANS GOING ABROAD, 2006-2013

Port/ Land Checkpost	Year							
	2006	2007	2008	2009	2010	2011	2012	2013
Mumbai (Airport)	2368115	2623707	2734458	2615702	3031822	3264653	3501739	37334176
Delhi (Airport)	1764264	1956299	2141600	2117561	2621535	3009762	3226344	35117589
Chennai (Airport)	1039973	1211400	1350418	1312197	1450521	1540106	1620314	1730503
Cochin (Airport)	591236	773310	915278	968375	1022233	1098333	1205315	1390833
Trivandrum (Airport)	474309	578647	619856	642011	751861	677998	739698	854564
Hyderabad (Airport)	461616	494797	482897	543719	740350	777540	810903	925401
Calicut (Airport)	454606	526290	735151	791021	904130	970961	986463	1112297
Bangaluru (Airport)	369508	491088	530054	577191	664083	746051	810108	852591
Kolkata (Airport)	232219	286953	294644	307379	411210	453682	502802	562907
Ahmedabad (Airport)	170458	225479	262734	296778	275981	286707	366102	95714
Others	488054	670283	838164	928182	1093478	1178935	1234362	1579353
Total	8339614	9783232	10867999	11066072	12988001	13994002	14924755	16626316

Source:-Bureau of Immigration & India Tourism Statistics 2013

CHAPTER 6



Domestic Tourism in India

The compilation of domestic tourism statistics is undertaken by the Statistical Cells in the Departments of Tourism of State/UT Governments. The statistics are based on the monthly returns collected from hotels and other accommodation establishments. The information is collected by using specific formats, and aggregate centre-wise statistics are sent to the Market Research Division of the Ministry. Most of the States/UTs have been compiling information on domestic and foreign tourist visits to the State, as also number of nights spent by them. However, there are certain data-gaps as some of the States have not been furnishing complete information as required to tabulate data on All-India basis. The figures of domestic and foreign tourist visits in various States/UTs for the years 1991 to 2013 have been compiled/estimated on the basis of data available.

TABLE 6.1.1**DOMESTIC & FOREIGN TOURIST VISITS TO STATES/UTS, 1991-2013**

Year	Tourist Visits			Annual Growth Rate		
	Domestic	Foreign	Total	Domestic	Foreign	Total
1991	66670303	3146652	69816955	-	-	-
1992	81455861	3095160	84551021	22.2 %	-1.6 %	21.1 %
1993	105811696	3541727	109353423	29.9 %	14.4 %	29.3 %
1994	127118655	4030216	131148871	20.1 %	13.8 %	19.9 %
1995	136643600	4641279	141284879	7.5 %	15.2 %	7.7 %
1996	140119672	5030342	145150014	2.5 %	8.4 %	2.7 %
1997	159877208	5500419	165377627	14.1 %	9.3 %	13.9 %
1998	168196000	5539704	173735704	5.2 %	3.7 %	5.1 %
1999	190671034	5832015	196503049	13.4 %	5.3 %	13.1 %
2000	220106911	5893542	226000453	15.4 %	1.1 %	15.0 %
2001	236469599	5436261	241905860	7.4 %	7.8 %	7.0 %
2002	269598028	5157518	274755546	14.0 %	5.1 %	13.6 %
2003	309038335	6708479	315746814	14.6 %	30.1 %	14.9 %
2004	366267522	8360278	374627800	18.5 %	24.6 %	18.6 %
2005	391948589	9949676	401898265	7.0 %	19.0 %	7.3 %
2006	461762847	11748226	473511073	17.8 %	18.1 %	17.8 %
2007	526564478	13256637	539821115	13.9 %	12.9 %	14 %
2008	563034107	14380633	577414740	6.9 %	8.5 %	6.96 %
2009	668800482	14372300	683172782	18.8 %	-0.1 %	18.32 %
2010	747703380	17910178	765613558	11.8 %	24.6 %	12.07 %
2011	864532718	19497126	884029844	15.6 %	8.86 %	15.47 %
2012	1045047536	18263074	1063310610	20.6 %	6.3%	20.28 %
2013	1145280443	19951026	1165231469	9.6%	9.2%	9.6%

Source: India Tourism Statistics 2013

TABLE 6.1.2

**PERCENTAGE SHARES AND RANKS OF DIFFERENT STATES/UTS IN
DOMESTIC AND FOREIGN TOURIST VISITS DURING 2013**

Sl.No	State /UT	Tourist Visits		Percentage share		Rank	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
1	Andaman & Nicobar Islands	2343703	14742	0.02	0.07	30	25
2	Andhra Pradesh	152102150	223518	13.28	1.12	3	14
3	Arunachal Pradesh	125461	10846	0.01	0.05	32	27
4	.Assam	4684527	17638	0.41	0.09	21	24
5	Bihar	21588306	765835	1.88	3.84	11	8
6	Chandigarh	936922	40124	0.08	0.2	24	22
7	Chhattisgarh	22801031	3886	1.99	0.02	10	30
8	Dadra & Nagar Haveli	481618	1582	0.04	0.01	28	33
9	Daman & Diu	819947	4814	0.07	0.02	25	29
10	Delhi	20215187	2301395	1.77	11.5	14	3
11	Goa	2629151	492322	0.23	2.47	22	10
12	Gujarat	27412517	198773	2.39	1	8	16
13	Haryana	7128027	228200	0.62	1.14	20	13
14	Himachal Pradesh	14715586	414249	1.28	2.08	16	11
15	Jammu & Kashmir	13642402	60845	1.19	0.3	17	19
16	Jharkhand	20511160	45995	1.79	0.23	13	20
17	Karnataka	98010140	636378	8.56	3.19	4	9
18	Kerala	10857811	858143	0.95	4.3	18	7
19	Lakshadweep	4784	371	0	0	35	35
20	Madhya Pradesh	63110709	280333	5.51	1.41	6	12
21	Maharashtra*	82700556	4156343	7.22	20.84	5	1
22	Manipur	140673	1908	1.01	0.01	31	32
23	Meghalaya	691269	6773	0.06	0.03	26	28
24	Mizoram	63377	800	0.01	0	33	34
25	Nagaland	35638	3304	0	0.02	34	31
26	Odisha	9800135	66675	0.86	0.33	19	18
27	Puducherry	1000277	42624	0.09	0.21	23	21

28	Punjab	21340888	204074	1.86	1.02	12	15
29	Rajasthan	30298150	1437162	2.65	7.2	7	5
30	Sikkim	576749	31698	0.05	0.16	27	23
31	Tamil Nadu	244232487	3990490	21.34	20	1	2
32	Tripura	359586	11853	0.03	0.06	29	26
33	Uttarakhand	19941128	97683	1.74	0.49	15	17
34	Uttar Pradesh	226531091	2054420	19.78	10.3	2	4
35	West Bengal	25547300	1245230	2.23	6.24	9	6
	Total	1145280443	19951026	100	100		

* Estimated as all India growth of state

** Estimate using tourist visits figures of sample of Hotel furnish by state Govt.

CHAPTER 7



Approved Hotels

7.1 AVAILABILITY OF ACCOMMODATION FACILITY IN CLASSIFIED HOTELS IN KERALA

As per the data from Ministry of Tourism, Government of India, the total number of classified hotels as on December 2013 is 389. The total number of rooms available is 9799. The category wise number of classified hotels is given in table 7.1.1. The detailed list of all classified hotels as on December 2013 is given as Annexure

TABLE 7.1.1

DETAILS OF AVAILABILITY OF ACCOMMODATION FACILITY IN KERALA IN CLASSIFIED HOTELS 2013

Category of Hotels	As on 31/12/2013	
	Number of Hotels	Number of Rooms
1	2	3
5 Star Deluxe	7	559
5 Star	12	958
4 Star	53	1780
3 Star	269	5798
2 Star	32	495
Heritage/UnClassified	16	209
Total	389	9799

As per the India Tourism, Department of Tourism & Culture there are 389 Classified hotels in the state . Out of which 269 are three star hotels (69%).

7.2 APPROVED HOTELS IN INDIA

TABLE 7.2.1

NUMBER OF APPROVED HOTELS IN INDIA AND AVAILABILITY OF ROOMS DURING 2013

Category	No. of hotels	No. of Rooms
One Star	82	1193
Two Star	121	3154
Three Star	637	26617
Four Star	111	7738
Five Star	85	10128
5* Deluxe	106	21820
Heritage Hotel	46	1322
B&B Establishment	31	158
Guest House	4	61
Unclassified	30	1989
Total	1257	75353

7.3.ACCOMODATION UNITS IN KERALA

As per the data , the total number of Approved Ayurvedic centers is 67,approved serviced villas is 105,approved grihasthali units is 6and approved Homestays is 311 as on December 2014.

The total number of accommodation units is 5350and the number of rooms available is 73951. The category wise list is given is given in table 5.1 to 5.6. The detailed list of all classified centers as on December 2014 is given as Annexure

7.3.1 Approved ayurvedic centers in Kerala as on December 2014

1	THIRUVANANTHAPURAM	22
2	KOLLAM	3
3	PATHANAMTHITTA	1
4	ALAPPUZHA	7
5	KOTTAYAM	9
6	IDUKKI	3
7	ERNAKULAM	11
8	THRISSUR	10
9	PALAKKAD	
10	MALAPPURAM	
11	KOZHIKODE	
12	WAYANAD	
13	KANNUR	1
14	KASARAGOD	
TOTAL KERALA		67

7.3.2 Approved Serviced villas in Kerala as on December 2014

Sl.No	Districts	Number of Units
1	THIRUVANANTHAPURAM	2
2	KOLLAM	3
3	PATHANAMTHITTA	3
4	ALAPPUZHA	4
5	KOTTAYAM	3
6	IDUKKI	32
7	ERNAKULAM	24
8	THRISSUR	1
9	PALAKKAD	1
10	MALAPPURAM	2
11	KOZHIKODE	4
12	WAYANAD	17
13	KANNUR	7
14	KASARAGOD	2
TOTAL KERALA		105

7.3.3 Approved Grihasthali Units in Kerala as on December 2014

Districts	Number of Units
THIRUVANANTHAPURAM	0
KOLLAM	0
PATHANAMTHITTA	0
ALAPPUZHA	0
KOTTAYAM	2
IDUKKI	0
ERNAKULAM	3
THRISSUR	1
PALAKKAD	0
MALAPPURAM	0
KOZHIKODE	0
WAYANAD	0
KANNUR	0
KASARAGOD	0
Total	6

7.3.4 Approved Homestays in Kerala as on December 2014

Sl.No.	District	No: of Approval&	No. of Home stays as per Classification		
		Recommended Applications	Diamond		Silver
1	THIRUVANANTHAPURAM	40	8	12	20
2	KOLLAM	10	6	1	3
3	PATHANAMTHITTAx	9	3	5	1
4	ALAPPUZHA	90	19	18	53
5	KOTTAYAM	17	9	5	3
6	IDUKKI	45	6	8	31
7	ERNAKULAM	51	6	15	30
8	THRISSUR	18	6	6	6
9	PALAKKAD	9	6	1	2
10	MALAPPURAM	3	2	1	0
11	KOZHIKODE	4	0	1	3
13	WAYANAD	9	0	3	6
12	KANNUR	4	1	0	3
14	KASARGOD	2	0	2	0
	TOTAL	311	72	78	161

7.3.5 Accomodation units in Kerala-Districtwise

District	Ayurvedic centre	Grihasthali	Guest House	Homestay	Hotel	House Boat	Others	Resort	Rest house	Servicedvilla	Yathrinivas	Total
Alappuzha	4	0	3	104	42	634	213	29	5	4	0	1038
Ernakulam	21	3	5	124	236	0	392	34	14	7	1	837
Idukki	1	0	4	151	63	0	185	111	4	38	1	558
Kannur	7	0	2	13	66	0	90	7	14	2	0	201
Kasargod	8	0	1	0	15	2	45	3	8	0	0	82
Kollam	14	0	14	8	68	13	83	8	8	0	0	216
Kottayam	13	2	11	74	59	81	59	22	9	1	0	331
Kozhikode	4	0	7	5	55	0	99	3	10	1	0	184
Malappuram	4	0	2	9	38	0	140	3	13	0	0	209
Palakkad	4	0	3	4	61	0	104	3	18	0	0	197
Pathanamthitta	18	0	2	10	33	0	37	0	6	2	0	108
Thiruvananthapuram	24	0	16	37	139	0	329	174	8	3	1	731
Thrissur	28	1	10	5	108	2	181	13	13	2	0	363
Wayanad	6	0	1	56	28	0	107	54	6	39	2	299
	156	6	81	600	1011	732	2064	464	136	99	5	5354

7.3.6 District wise –Number of rooms in Kerala

District	Single		Double		Suit	Dormitory	Others	Total
	A/C	Non A/C	A/C	Non A/C				
Thiruvananthapuram	135	2102	4479	5437	647	69	115	12984
Kollam	91	744	853	1073	114	21	210	3106
Pathanamthitta	34	316	333	650	36	21	52	1442
Alappuzha	272	367	1142	1025	87	20	127	3040
Kottayam	254	516	1110	1026	160	24	128	3218
Idukki	17	435	133	5308	319	63	801	7076
Ernakulam	319	2150	6864	5463	794	193	292	16075
Thrissur	174	963	1885	2661	305	104	982	7074
Palakkad	42	620	674	1360	101	28	196	3021
Kozhikode	242	1101	851	1886	147	25	227	4479
Malappuram	40	786	647	1592	142	133	142	3482
Wayanad	23	435	261	1771	172	148	490	3300
Kannur	51	769	841	1849	120	43	198	3871
Kasargod	145	433	341	681	51	3	129	1783
Total	1839	11737	20414	31782	3195	895	4089	73951

CHAPTER 8



Travel Trade

8.1 TRAVEL AGENTS, TOUR OPERATORS AND TOURIST TRANSPORT

OPERATORS

In order to provide quality services to the tourists, the Ministry of Tourism grants recognition to travel agents, tour operators, tourist transport operators, adventure tour operators and domestic tour operators in the country, as per the prescribed guidelines . As on 31st December 2013, 107 travel agencies, 168 tour operators, 54 tourist transport operators, 6 adventure tour operators and 14 domestic tour operators were registered with the Ministry . The State-wise distributions of these units are given in Table 8.1.1.

TABLE 8.1.1

STATE-WISE LIST OF RECOGNIZED TOUR OPERATORS, TRAVEL AGENCIES, TOURIST TRANSPORT OPERATORS, ADVENTURE TOUR OPERATORS & DOMESTIC TOUR OPERATORS

As on 31.12.2013

Sl. No	State/UT	Inbound Tour Operators	Travel Agencies Operators	Tourist Transport Operators	Adventure Tour Operators	Domestic Tour Operators
1.	Andhra Pradesh	2	4	1	0	0
2.	Arunachal Pradesh	0	0	0	0	0
3.	Assam	3	1	0	0	0
4.	Bihar	1	2	0	0	0
5.	Chandigarh	0	0	2	0	2
6.	Chhattisgarh	0	0	0	0	0
7.	Goa	3	2	0	0	0
8.	Gujarat	5	6	0	0	0
9.	Haryana	10	0	1	1	1
10.	Himachal Pradesh	0	0	0	0	1
11.	Jammu & Kashmir	1	0	0	3	0

12.	Jharkhand	0	0	0	0	0
13.	Karnataka	4	5	2	0	1
14.	Kerala	6	2	11	0	0
15.	Madhya Pradesh	0	0	0	0	0
16.	Maharashtra	18	20	7	0	2
17.	Manipur	0	1	0	0	0
18.	Meghalaya	0	0	0	0	0
19.	Mizoram	0	0	0	0	0
20.	Nagaland	0	0	0	0	0
21.	Odisha	0	0	2	0	0
22.	Puducherry	0	1	1	0	0
23.	Punjab	0	1	1	0	0
24.	Rajasthan	5	1	0	0	0
25.	Sikkim	1	0	0	0	0
26.	Tamil Nadu	10	16	6	0	1
27.	Tripura	0	0	0	0	0
28.	Uttar Pradesh	4	5	0	0	0
29.	Uttarakhand	0	1	0	0	0
30.	West Bengal	2	4	2	0	1
31.	Andaman & Nicobar Islands	0	0	0	0	0
32.	Dadra & Nagar Haveli	0	0	0	0	0
33.	Daman & Diu	0	0	0	0	0
34.	Delhi	93	35	18	2	6
35.	Lakshadeep	0	0	0	0	0
	Total	168	107	54	6	14

CHAPTER 9



Human Resource Development

9.1.KITTS(KERALA INSTITUTE OF TOURISM AND TRAVEL STUDIES)

1. Profile

Kerala Institute of Tourism and Travel Studies (KITTS), imparts quality education and training in the field of Travel and Tourism. KITTS is currently an Affiliated Member of United Nations World Tourism Organisation (UNWTO) and Vice President, Affiliated Member of the UNWTO in Asia Pacific Region. The Institute, established in the year of 1988, caters to the manpower requirements of tourism industry by offering various courses directly benefiting the industry. The MBA (Travel and Tourism) and BBA (Tourism Management) course of the institute is affiliated to University of Kerala. In addition to this, the institute offers short term industry demand driven courses and undertakes extension activities like training, capacity building programmes, and research and consultancy on various aspects of tourism development. The institute is an autonomous organization registered under the Travancore-Cochin Literary, Scientific and charitable societies Registration Act 1955 (Act 12 of 1955). The Executive Committee and General Body of the institute is chaired by Minister for Tourism. Besides its headquarters at Thiruvananthapuram, it has study centres at Ernakulam, Malayattor and Thalasserry. Since its inception, the institute has succeeded in ensuring 100% placement to the students.

2. Industry Linkage / Network

With a view to ensure professionalism and skill development in tourism of international standards, the institute maintains network and linkages with national and international organisations. The major industry linkage/ network of the institute is listed below:

- Kerala Chapter of International Centre for Responsible Tourism (ICRT)
- Member of International Ecotourism Society (TIES)
- Industry-Education member of PATA
- Allied Member of Indian Association of Tour Operators(IATO)
- Member of Kerala Travel Mart Society
- Certified for the quality system in accordance to the standard ISO 9001:2008
- Authorised learning centre of IATA

- Member of depository library and e-library of UNWTO.

4. Infrastructure

The headquarters at Thiruvananthapuram is housed at The Residency Bungalow at Thycaud spread over 5.5 acres of land. Fully furnished academic block with wi-fi connectivity and modern facilities such as projector, interactive board, white board and audio systems provide latest infrastructure facilities for conducting classes, training, workshops, seminars etc. The library of KITTS is having a collection of more than 7000 books related to travel, tourism, management and hospitality sectors. Adequate reading materials, resource books and journals related to hospitality management is available in the library. The access to e-library of UNWTO is the landmark of this library. The computer lab of KITTS is equipped with modern technology with a seating capacity to accommodate 60 students. The separate language lab facilitates effective communication in foreign languages. The Girls Hostel in the campus with all modern facilities can accommodate 69 inmates at a time. The upcoming International Training Centre is expected to facilitate international conferences, seminars, symposiums and training programmes.

5. Courses Offered

The following courses are being conducted for the current year. These courses are designed after taking feed backs of the tourism industry on their requirement and focus is given for short term courses as suggested by the industry.

- MBA (Travel & Tourism) – 2 Year (Affiliated to University of Kerala & Approved by AICTE)
- BBA (Tourism) – 3 Years (Affiliated to University of Kerala)
- Post Graduate Diploma in Tourism and Public Relations Management - 1 year
- Diploma in Airport Operations - 6 months
- Diploma in Logistics Management – 6 months
- Certificate course in Travel Consultancy – 3 months
- Certificate course in Compering and Communication - 2 months
- Certificate courses in German, French, Spanish, Arabic, Russian, Hindi – 3 months
- IATA Certificate Course in Foundation in Travel and Tourism – 4 months
- IATA Certificate Course in Travel and Tourism Consultant – 4 months

6. Nodal agency for Responsible Tourism (RT) initiative

Responsible Tourism (RT) initiative of Kerala Tourism is the first ever coordinated initiative in the country for implementing the Responsible Tourism concept across economic, social and environmental aspects. The project was started in 2007 on a pilot basis in four destinations of Kovalam, Kumarakom, Thekkady and Vythiri as a new model for tourism development with the active support of the local community. Three more destinations, Ambalavayal, Kumbalangi and Bekal were added in 2012 as new RT destinations. Under the Mission 676 Programme the RT initiative is being broad based to another 112 Local Self - Governments. KITTS is currently the nodal agency for implementing the project in the state. The training and capacity building programmes to the local panchayaths and other partners are also being done through KITTS as part of the initiative.

7. Centre for Responsible Tourism

This Centre was established with the declared objective for conducting specific courses, Management Development Programmes, Summer Schools, Seminars, Symposiums, Training Programmes, Material Production, Research activities that are related to Responsible Tourism. The Centre for Responsible Tourism is also operating as the Kerala Chapter of International Centre for Responsible Tourism (ICRT).

8. Centre for Ecotourism

The Center for Ecotourism of KITTS is taking a lead role in conducting Regional Workshops on Ecotourism and Capacity Building Programme to the members of EDC / VSS working in various ecotourism destinations of the state. The CET is working in association with Directorate of Ecotourism, Government of Kerala to develop unique theme based ecotourism villages in the state. As part of developing ecotourism villages, CET proposes to evaluate micro and macro ecotourism destinations to examine the scope and major challenges for preparing action plans for sustainable development of ecotourism. At present, the CET of KITTS is designing Heritage Walk Programme for Chinnar Wildlife Sanctuary focusing on the natural and cultural heritage values of the sanctuary. It is also proposed to prepare Ecotourism Handbook for each ecotourism destinations in the state. The CET is in the process of conducting two months Naturalist Certificate Course in

association with Scheduled Caste Development Department, Government of Kerala for SC Candidates of EDC / VSS members and those who are living in the vicinity areas of ecotourism destinations in the state to train 600 candidates in 14 batches. The Center for Ecotourism of KITTS is taking efforts for the collaboration with Indian Trust for Rural Heritage Development (ITRHD) for strengthening the ecotourism initiatives in a sustainable manner.

9. Publications Journal

- Indian Journal of Tourism and Hospitality Management (bi –annual)

Books

- Tourism and Livelihood
- Responsible Tourism Initiative of Kerala – A Case Study on Kumarakom
- Environment, Tourism and Development
- Guiding Skills
- *Uttharavadittha Tourism – Enthu Enthukondu?*
- *Keralam – Thirenjedutha Ecotourism Kendrangal*
- *Keralam – Vanavum, Vanyajeevikalum, Tourisavum*
- *Destination Management Council*

In addition to this, the faculty of KITTS in collaboration with State language Institute has published seven books dealing different aspects of tourism.

10. Training Programmes

As a service industry, tourism is consisting of skilled, semiskilled and unskilled manpower in different areas of its management which requires frequent training programmes to offer better service. Realizing this fact, KITTS has been engaged in organizing and conducting various training programme for different stakeholders of tourism and related sectors. The training/capacity building programme for tourism police, life guards, taxi drivers, emigration officers, Tourism Information Officers, District Tourism Promotion Council (DTPC), Departmental Officers, Tourism Clubs etc. are given by KITTS based on the directions from Department of Tourism.

In addition to this, KITTS submit proposals to various organisations and Departments and undertake trainings which are funded by these agencies. In 2013, State Planning Board, Government of Kerala had sanctioned Rs. 2.5 crores for conducting skill development programme on tourism and the institute has trained 1400 unemployed youth across the state in identified areas in tourism.

The on-going training programmes are given below:

1. Hunar Se Rozgar Tak programme is fully funded by Ministry of Tourism, Government of India. As per this scheme training is given for 8th standard pass students on food and beverage production for a period of 48 days with a stipend of Rs. 2000/- and on food and beverage service and housekeeping for a period of 36 days with a stipend of Rs. 1500/-. KITTS has so far successfully trained 1378 numbers in 2012-13, 7322 numbers in 2013-14 and 9541 numbers will be trained in 2014-15, out of which 5025 numbers have already been trained this year.

11. Research and Consultancy

The Research and Consultancy wing of KITTS has been engaged in conducting various research studies and training programme for different stakeholders of this service industry with the aim of promoting sustainable tourism practices in the state. This wing consists of diverse pool of experts including in – house faculty members as well as consultants. KITTS is currently empanelled as consultants in tourism sector by the State Planning Board.

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9.2.IHMCT

INSTITUTE OF HOTEL MANAGEMENT AND CATERING TECHNOLOGY (MINISTRY OF TOURISM, GOVERNMENT OF INDIA) KOVALAM, THIRUVANANTHAPURAM

THE INSTITUTE

The Institute of Hotel Management And Catering Technology, Kovalam, Thiruvananthapuram was set up by the Ministry of Tourism, Government of India in 1990 as part of a country wide net work of existing 21 Central Institutes of Hotel Management affiliated to the National Council For Hotel Management And Catering Technology, Noida. The IHMCT, Thiruvananthapuram is rated as one of the best Institutes of Hotel Management in the country with the prestigious ISO 9001:2008 Certification from the Bureau of Indian Standards for its quality and standards.

COURSES OFFERED:

Three year B.Sc Programme in Hospitality and Hotel Administration:

The Bachelor of Science programme in Hospitality and Hotel Administration is jointly offered by the National Council for Hotel Management and Catering Technology, Noida and the Indira Gandhi National Open University, New Delhi. This three year (six semester) regular course uniformly conducted in all the National Council affiliated IHMs, equips trainees with all the required Skills, Knowledge and Attitude to efficiently discharge managerial and supervisory responsibilities in the hospitality sector. The programme also involves in-depth laboratory work for students to acquire required knowledge and skill standards in the operational areas of Food Production, Food & Beverage Service, Front Office Operation and House Keeping. It also provides managerial inputs in Hotel Accountancy, Food Safety & Quality, Human Resource Management, Facility Planning, Financial Management, Strategic Management, Tourism Marketing and Tourism Management.

Candidates passed in 10 + 2 system of Senior Secondary or its equivalent examinations with English as one of the subjects are admitted to the course through an All India Joint Entrance Examination conducted by the National Council during the month of April

followed by the online counseling and seat allotment in the month of June - July. The JEE notification is released by the National Council normally in the month of January every year. Those appearing for plus two or equivalent examinations during the year can also appear for the JEE. The upper age limit for admission is 22 years for general category and 25 years for SC/ST as on 1st July of the year. 15% and 7.5% seats are reserved for SC and ST categories respectively and 27% seats are reserved for candidates belonging to OBC (Non Creamy Layer) category. 3% of seats across the board are reserved for Physically Disabled candidates.

SHORT TERM COURSES:

Sl No	Course Title	Eligibility	Duration	Approx. Fees	Max. Age
1	Diploma Course in Food Production	10+2 Pass	1 ½ year (One year studies at the Institute and 6 months training in hotel)	Rs.35,540/-	25 Yrs. (28 years for SC/ST)
2	Diploma Course in Food & Beverage Service	10+2 Pass	"	Rs.30,090/-	25 Yrs. (28 years for SC/ST)
3	PG Diploma Course in Accommodation Operation and Management	Graduate from a recognized University	"	Rs.24760/-	25 Yrs. (28 years for SC/ST)

In addition to the above courses,, the Institute also conducts job oriented Free Short Term Hospitality Courses under the programme "HUNAR SE ROZGAR" as part of the scheme of "Capacity Building For Service Providers" fully sponsored by the Ministry of Tourism, Government of India.

OUR MOTTO

"LEARN AND SERVE" is our motto and "QUALITY SERVICE" is our code of profession. A well amalgamated mix of theory, practical and live hands-on experience in both the Institute and industry gives credence to these principles.

OUR QUALITY POLICY:

To impart knowledge, develop skills and enhance attitudes to meet the evolving challenges of the hospitality industry by continually improving the effectiveness of our quality management system.

To complement the government's efforts in the promotion of tourism by providing professionals to the industry.

OUR FACULTY

An eminent group of teachers with exposure to the international scene of hospitality, groom our students into thorough professionals. In addition, prominent personalities in the hospitality industry and related areas visit the Institute to deliver guest lectures at regular intervals.

CO-CURRICULAR ACTIVITIES

Annual Food Festivals, Theme Dinners, Seminars on Hospitality and Tourism etc. form part of the co-curricular activities which makes it a value added experience for the students. The Institute provides as many opportunities as possible to the students for organizing such programmes with a view to provide them hands on live experience to enrich their professional skills and experience. The annual Food & Fun Festival “FANDANGO” organized by the students is one of the major events which provides excellent learning opportunities to the students.

EXTRA CURRICULAR ACTIVITIES

To develop the all round personality, the students are categorized into different houses and they take active participation in cultural, literacy and sports competitions. “CATA' FEST”, the annual two-day cultural and literacy inter house competitions conducted by the Institute bring out the talents and the competition spirit of the young minds. The “ANNUAL SPORTS DAY” organized by the Institute for its students showcases the sportsman spirit of the students.

PLACEMENT

The employment opportunities to our students are extremely good and prospects are very rewarding. Various hotel chains and other organizations in the hospitality sector conduct campus interviews at the Institute for the final year students of the Degree Course for job placement. The Institute has been able to achieve 100% placement record and also to have the privilege of seeing all its passed out students with well paid jobs in the hospitality and service sectors.

FACILITIES :

Apart from the state of the art infrastructural facilities for imparting quality training, the Institute has a fully air conditioned library with internet connectivity, a fully air conditioned auditorium with 600 seating capacity, fully equipped computer labs, students hostels and gymnasium, staff quarters etc. in the campus.

LIBRARY

In addition to a wide range of books related to the subject, various journals, magazines, news papers, video cassettes and internet connectivity provide a support system to the students.

COMPUTER LAB

A Computer Lab with a Local Area Network system offers 1:1 hands-on training for the students in the Institute premises.

HOSTEL FACILITY

The Institute has separate hostel facilities for boys and girl students in the campus. The facility is available to accommodate 182 boys and 32 girls. Well experienced Wardens look after the welfare of the students of each hostel.

GYM

"A healthy mind stay in a healthy body". The college has a well equipped gym for the use of the students.

BANK FACILITY

Banking facility is provided in the institution campus.

RESOURCE RECOVERY FACILITY

The Institute has a zero waste campus having a resource recovery facility with a biogas plant installed as a pilot project for systematic disposal of waste. Over the last few years the Institute has been able to substantially reduce its usage of natural gas while simultaneously creating additional revenue streams by implementing the "Zero Waste" concept in the campus, selected by Kerala Tourism as the nodal agency for implementing the "Zero Waste Kovalam", intended to manage and eliminate waste from the campus, combined bio-gas

plant for managing biodegradable waste. This measure has helped the institute to reduce its weekly consumption of natural gas, also enabling it to manage its waste in a responsible manner.

LOCATION OF THE INSTITUTE

The Institute campus is located near the internationally famous Kovalam Beach in the capital city of Kerala, the “God’s Own Country”, at a distance of about 13 KMs. from the Thiruvananthapuram International Airport and 16 KMs. from the Central Railway Station.

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CHAPTER 10



Plan Outlays

PLAN OUTLAYS

TABLE 10.1.1

ANNUAL PLAN OUTLAY (2013-14)

INCOME AND EXPENDITURE OF KERALA TOURISM

UNDER THE YEAR 2013-2014

(A) Budget Provision	Amount (Rs.)
3452 – Tourism 2013-14	
Plan	89,53,00,000.00
Additional appropriation	4,22,50,000.00
Non Plan	53,94,91000.00
5452 – Tourism 2013-14	
80- Plan	101,70,00,000.00
Non Plan	10,00,00,000.00
Total	2551791000.00
(B) Expenditure	Amount (Rs.)
3452 – Tourism 2013-14	
Basic Facilities	
Plan	93,75,40,708.00
Non Plan	48,20,43,152.00
5452	
Plan	99,47,86,258.00
Non-Plan	10,00,00,000.00

TABLE 10.1.2

ALLOCATION AND EXPENDITURE FOR TOURISM UNDER THE YEAR 2013-2014

Sl No.	Name of State Plan Scheme	Provision	Final Appropriation (Rs.)	Expenditure 31 march 2014	Amount surrendered
1	Development of Innovative Tourism Products	20,000,000	20,000,000	19,000,800	200
2	Kerala Waste free destination scheme	30,000,000	30,000,000	30,000,000	Nil
3	Development of Eco Tourism Products	32,000,000	32,000,000	32,000,000	Nil
4	IT enabled marketing tools (One Time ACA)	20,000,000	20,000,000	19,000,726	274
5	Kerala Tourism Promotion and Marketing Mechanism	150,000,000	150,000,000	149,999,211	789
6	Marketing	280,000,000	280,000,000	279,998,639	1,361
7	Conservation Preservation and Promotion of Heritage Environment and Culture	60,000,000	102,250,000	102,249,716	284
8	Responsible Tourism	30,000,000	30,000,000	29,996,000	4,000
9	Infrastructure Facilities and matching grants for schemes sponsored by Govt of India	55,000,000	55,000,000	55,000,000	Nil
10	HR developemnt in Tourism through Kerala Institute of Tourism and Travel Studies (KITTS), Food Craft Institute (FCI) & State Institute of Hospitality Management studies (SIHM) :- (KITTS : Rs. 350 lakhs & FCI : 250 lakhs & SIHM : 250 lakhs)	85,000,000	85,000,000	85,000,000	Nil
11	District Tourism Promotion Councils (DTPC) and DMC	55,000,000	55,000,000	54,998,726	1,274
12	Incentives for Creation of Infrastructure facilities and tourism products in private sector-Subsidies	60,000,000	60,000,000	60,000,000	Nil
13	Studies on Impact of Tourism including collection of Tourist statitics	7,500,000	7,500,000	7,499,996	4
14	Modernisation and Strengthening of Tourism Institutions	10,800,000	10,800,000	10,798,894	1,106
15	Upgradation and Creation of Infrastructure and amenities	585,000,000	602,613,787	602,613,787	Nil
16	Kerala Sea Plane Project	100,000,000	100,000,000	100,000,000	Nil
17	Comprehensive and Infrastrcture Development of Varkala Formation of special Purpose Vehicle (SPV)	20,000,000	20,000,000	20,000,000	Nil
18	Bakel Resort Development Corporation Ltd	15,000,000	15,000,000	15,000,000	Nil

19	Kerala Tourism Infrastructure Ltd	10,000,000	10,000,000	10,000,000	Nil
20	Kerala Tourism Development Corporation	65,000,000	65,000,000	65,000,000	Nil
21	Thalasserry Heritage Project	20,000,000	20,000,000	20,000,000	Nil
22	Muzris Heritage and Spice Route Project	75,000,000	75,000,000	75,000,000	Nil
23	Upgradation and Creation of Infrastructure and amenities	75,000,000	75,000,000	74,998,487	1,513
24	RIDF Schemes for Tourism	42,000,000	24,386,216	3,429,134	20,957,082
25	Guest Houses	10,000,000	10,000,000	7,711,850	2,288,150
26	Upgradation of Veli Tourism Centre to International Level Under PPP model by forming SPV	1,000	1,000	0	1,000
27	State Institute of Hotel Mngement at Kottayam	100,000	100,000	100,000	Nil
28	Development of Muzris Heritage circuit (100% CSS)	0	105,279,000	105,279,000	Nil
29	Development of Aruvikkara and Peppara Dam site (100% CSS)	0	6,454,000	6,454,000	Nil
30	Development of Neriya mangalam (100% CSS)	0	15,770,000	15,770,000	Nil
31	Development of Munnar (100% CSS)	0	29,281,000	29,281,000	Nil
32	Development of Karapuzha Dam Site (100% CSS)	0	19,362,000	19,362,000	Nil
33	Development of Peruvannamozhi and Kakkayam Dam Site (100% CSS)	0	5,000,000	5,000,000	Nil
34	Development of Thumbormozhi Dam site (100% CSS)	0	3,000,000	3,000,000	Nil
35	Development of Tourism Circuit in Back water Region of Alappuzha (100% CSS)	0	6,000,000	6,000,000	Nil
36	Development of IT Based Project for the Promotion of Kerala Tourism (100% CSS)	0	1,000,000	1,000,000	Nil
37	Development of Mobile based services for the Promotion of Kerala Tourism (100% CSS)	0	1,000,000	1,000,000	Nil
38	Development of Sarovaram Wet Land Nature Park, Koazhikkode	0	933,000	933,000	Nil
39	Kerala Travel Mart (100% CSS)	0	1,250,000	1,250,000	Nil
Total		1912401000	2148980003	2123724966	23257037

TABLE 10.1.3
NON – PLAN ALLOCATION AND EXPENDITURE
FOR TOURISM UNDER THE YEAR 2013-2014

Sl. No.	Title	Name of Project	Allotted Amount (Rs.)	Expenditure Amount (Rs.)	Amount Surrendered (Rs.)
1.	3452-01-103-99	Transport	65152586	64957768	194818
2.	3452-80-001-99	Administration	54313215	54308721	4,494.00
3.	3452-80-001-97	Offices of Regional Joint Directors	7211000	7111626	99374
4.	3452-80-001-96	District Offices	11902000	11892383	9617
5.	3452-80-001-95	Guest Houses, Yathri Nivases, Tourist Lodges	137036351	136771188	265163
6.	3452-80-104-98	Tourism Marketing	6586000	6586000	0
7.	3452-80-800-88	Tourist Information Centers	15754000	15751611	2389
8.	3452-01-800-99	Buildings - Others	1000000	1000000	0
9.	3452-01-800-98	Maintenance of Guest Houses and Prestigious Buildings	2500000	2500000	0
10	3452-80-800-35	FCI,Kalamassery and Extention Centers	31488000	31488000	0
11.	3452-01-102-92	Development of Elaveezha poonchira as a Tourist destination	100000	100000	0
12	3452-80-80054	Kerala shopping Festival	150000000	150000000	0
13	5452-01-800-85	Upgradation of Roads to Tourist Destination	100000000	100000000	0
		TOTAL	583043152	582467297	575855

TABLE 10.1.4**100% Plan Performance in 2013-14**

SI No.	Head of account	Name of Scheme	(Original) Rs in Lakhs
1	3452-01-102-89	Kerala Waste free destination scheme	300.00
2	3452-01-102-95	Development of Eco Tourism Products	320.00
3	3452-80-800-76	Infrastructure Facilities and matching grants for schemes sponsored by Govt of India	550.00
4	3452-80-800-78	HR developemnt in Tourism through Kerala Institute of Tourism and Travel Studies (KITTS), Food Craft Institute (FCI) & State Institute of Hospitality Management studies (SIHM) :- (KITTS : Rs. 350 lakhs & FCI : 250 lakhs & SIHM : 250 lakhs)	850.00
5	3452-80-800-90(26)-33	Incentives for Creation of Infrastructure facilities and tourism products in private sector-Subsidies	600.00
6	3452-80-800-92	Studies on Impact of Tourism including collection of Tourist statitics	75.00
7	5452-01-103-98	Kerala Sea Plane Project	1,000.00
8	5452-01-190-95	Comprehensive and Infrastrcture Development of Varkala Formation of special Purpose Vehicle (SPV)	200.00
9	5452-01-190-96	Bakel Resort Development Corporation Ltd	150.00
10	5452-01-190-98	Kerala Tourism Infrastructure Ltd	100.00
11	5452-01-190-99	Kerala Tourism Development Corporation	650.00
12	5452-01-800-83	Thalasserry Heritage Project	200.00
13	5452-01-800-84	Muzris Heritage and Spice Route Project	750.00
14	5452-01-190-93	State Institute of Hotel Mnagement at Kottayam	1.00
15	5452-01-800-75	Development of Muzris Heritage circuit (100% CSS)	1,052.79
16	5452-01-800-74	Development of Aruvikkara and Peppara Dam site (100% CSS)	64.54
17	5452-01-800-73	Development of Neriya mangalam (100% CSS)	157.70
18	5452-01-800-72	Development of Munnar (100% CSS)	292.81
19	5452-01-800-71	Development of Karapuzha Dam Site (100% CSS)	193.62
20	5452-01-800-70	Development of Peruvannamozhi and Kakkayam Dam Site (100% CSS)	50.00
21	5452-01-800-61	Development of Thumbormozhi Dam site (100% CSS)	30.00
22	5452-01-800-60	Development of Tourism Circuit in Back water Region of Alappuzha (100% CSS)	60.00

23	5452-01-800-59	Development of IT Based Project for the Promotion of Kerala Tourism (100% CSS)	10.00
24	5452-01-800-58	Development of Mobile based services for the Promotion of Kerala Tourism (100% CSS)	10.00
25	5452-01-800-57	Development of Sarovaram Wet Land Nature Park, Koazhikkode	9.33
26	3452-80-800-36	Kerala Travel Mart (100% CSS)	12.50
		Total	7689.29

TABLE 10.1.5**Plan Fund Allocation for the Financial Year 2013-14 + SDG- 1**

Sl No.	Head of account	Name of Scheme	Provision	Final Appropriation (Rs. In Lakhs)	
1	3452-01-102-86	Development of Innovative Tourism Products	200.00	200.00	
2	3452-01-102-89	Kerala Waste free destination scheme	300.00	300.00	
3	3452-01-102-95	Development of Eco Tourism Products	320.00	320.00	
4	3452-80-104-95	IT enabled marketing tools (One Time ACA)	200.00	200.00	
5	3452-80-104-97	Kerala Tourism Promotion and Marketing Mechanism	1,500.00	1,500.00	
6	3452-80-104-98	Marketing	2,800.00	2,800.00	
7	3452-80-104-99	Conservation Preservation and Promotion of Heritage Environment and Culture	600.00	1,022.50	*
8	3452-80-800-34	Responsible Tourism	300.00	300.00	
9	3452-80-800-76	Infrastructure Facilities and matching grants for schemes sponsored by Govt of India	550.00	550.00	
10	3452-80-800-78	HR developemnt in Tourism through Kerala Institute of Tourism and Travel Studies (KITTS), Food Craft Institure (FCI) & State Institute of Hospitality Management studies (SIHM) :- (KITTS : Rs. 350 lakhs & FCI : 250 lakhs & SIHM : 250 lakhs)	850.00	850.00	

11	3452-80-800-79	District Tourism Promotion Councils (DTPC) and DMC	550.00	550.00	
12	3452-80-800-90(26)-33	Incentives for Creation of Infrastructure facilities and tourism products in private sector-Subsidies	600.00	600.00	
13	3452-80-800-92	Studies on Impact of Tourism including collection of Tourist statistics	750.00	750.00	
14	3452-80-800-97	Modernisation and Strengthening of Tourism Institutions	1,080.00	1,080.00	
15	5452-01-101-99	Upgradation and Creation of Infrastructure and amenities	5,850.00	6,026.14	+
16	5452-01-103-98	Kerala Sea Plane Project	1,000.00	1,000.00	
17	5452-01-190-95	Comprehensive and Infrastructure Development of Varkala Formation of special Purpose Vehicle (SPV)	200.00	200.00	
18	5452-01-190-96	Bakel Resort Development Corporation Ltd	150.00	150.00	
19	5452-01-190-98	Kerala Tourism Infrastructure Ltd	100.00	100.00	
20	5452-01-190-99	Kerala Tourism Development Corporation	650.00	650.00	
21	5452-01-800-83	Thalasserry Heritage Project	200.00	200.00	
22	5452-01-800-84	Muzris Heritage and Spice Route Project	750.00	750.00	
23	5452-01-800-87	Upgradation and Creation of Infrastructure and amenities	750.00	750.00	
24	5452-01-800-94	RIDF Schemes for Tourism	420.00	243.86	(-)
25	5452-01-800-98(1)(2)(3)	Guest Houses	100.00	100.00	
26	5452-01-190-94	Upgradation of Veli Tourism Centre to International Level Under PPP model by forming SPV	0.01	0.01	
27	5452-01-190-93	State Institute of Hotel Mngement at Kottayam	1.00	1.00	
28	5452-01-800-75	Development of Muzris Heritage circuit (100% CSS)	0.00	1,052.79	*
29	5452-01-800-74	Development of Aruvikkara and Peppara Dam site (100% CSS)	0.00	64.54	*

30	5452-01-800-73	Development of Neriya Mangalam (100% CSS)	0.00	157.70	*
31	5452-01-800-72	Development of Munnar (100% CSS)	0.00	292.81	*
32	5452-01-800-71	Development of Karapuzha Dam Site (100% CSS)	0.00	193.62	*
33	5452-01-800-70	Development of Peruvannamozhi and Kakkayam Dam Site (100% CSS)	0.00	50.00	*
34	5452-01-800-61	Development of Thumbormozhi Dam site (100% CSS)	0.00	30.00	*
35	5452-01-800-60	Development of Tourism Circuit in Back water Region of Alappuzha (100% CSS)	0.00	60.00	*
36	5452-01-800-59	Development of IT Based Project for the Promotion of Kerala Tourism (100% CSS)	0.00	10.00	*
37	5452-01-800-58	Development of Mobile based services for the Promotion of Kerala Tourism (100% CSS)	0.00	10.00	*
38	5452-01-800-57	Development of Sarovaram Wet Land Nature Park, Koazhikkode	0.00	9.33	*
39	3452-80-800-36	Kerala Travel Mart (100% CSS)	0.00	12.50	*
Total			20,771.01	23,136.80	

(*)Sanctioned in the final batch of SDG

(+) Excess expenditure of Rs.1,76,13,787/- was incurred and requested Government to regularize the same(Original allocation - Rs. 58,50,00,000 Final appropriation - Rs.602613787, regularized vide order No. G.O(Rt) No.3031/2014/Fin dated 31/03/2014)

(-) Deducted Rs.1,76,13,787/- from the original allocation of Rs.4,20,00,000/- (Original allocation - Rs.4,20,00,000/- Final appropriation - Rs.24386216/-, regularized vide order No.G.O(Rt) No.3031/2014/Fin dated 31/03/2014)

TABLE 10.1.6**MINISTRY OF TOURISM ,GOVERNMENT OF INDIA**

Rs.in Crores

Sl.No	Name of Scheme Annual Plan (2014-15)	Year 2014-15
	Centrally Sponsored Schemes(CSS)	
1	Product/Infrastructure Development for Destinations and Circuits	375
	TOTAL-CSS	375
	Central Sector Schemes(CS)	
2	Externally Aided Projects	1.5
3	Assistance to IHMs/FCIs/IITTM/NIWS	165
4	Capacity Building for Service Providers	117.4
5	Overseas Promotion and Publicity including Market Development assistance	330
6	Domestic Promotion and Publicity including Hospitality	142
7	Incentives to accomodation Infrastructure	0.1
8	Computerisation and Information Technology	38
9	Market research Including 20 years Perspective Plan	28
10	Assistance for Large Revenue Generating Projects	28
11	Creation of Land bank for Hotels	0
12	Assistanc e to cental agencies for Tourism infrastructure development	57
13	New Scheme -Tourism circuits	500
14	New scheme -National Mission for Beautifying Pilgrimages Centers	100
	TOTAL -CS	1507
	GRAAND TOTAL (CS+CSS)	1882

TABLE 10.1.7

STATE-WISE TOURISM PROJECTS SANCTIONED DURING THE YEAR 2013-14

Sl. No.	State	No. of projects	Amount sanctioned (Rs. In crores)
1.	Andhra Pradesh	25	181.79
2.	Assam	0	0.00
3.	Arunachal Pradesh	11	74.74
4.	Bihar	14	111.10
5.	Chhattisgarh	0	0.00
6.	Goa	0	0.00
7.	Gujarat	0	0.00
8.	Haryana	8	14.87
9.	Himachal Pradesh	1	33.71
10.	J&K	45	85.47
11.	Jharkhand	1	5.00
12.	Karnataka	8	32.29
13.	Kerala	10	46.68
14.	Madhya Pradesh	9	100.21
15.	Maharashtra	6	67.95
16.	Manipur	11	214.38
17.	Meghalaya	1	0.47
18.	Mizoram	10	47.11
19.	Nagaland	9	52.22
20.	Odisha	12	65.43
21.	Punjab	2	10.39
22.	Rajasthan	10	51.75
23.	Sikkim	11	104.35
24.	Tamil Nadu	0	0.00

25.	Tripura	0	0.00
26.	Uttarakhand	30	265.33
27.	Uttar Pradesh	24	130.13
28.	West Bengal	0	0.00
29.	Andaman & Nocobar	0	0.00
30.	Chandigarh	0	0.00
31.	Dadar Nagar Haveli	0	0.00
32.	Delhi	2	57.69
33.	Daman & Diu	0	0.00
34.	Lakshadweep	0	0.00
35.	Puducherry	1	48.48
	Total	1 261	1801.54

Note- This includes projects relating to Products /Infrastructure Development for Destinations and circuits (PIDDC),Human Resource Development (HRD), Rural Tourism, Fair & Festivals Projects

CHAPTER 11



Surveys and Studies

11.1. CONTINUOUS TOURIST SURVEY - 2012-13

Kerala has a system of collecting visitor statistics from accommodation establishments on a regular basis by using ICT infrastructure. The system generates reliable and timely data on both foreign and domestic tourist visits on a continuous basis. It also provides details of nationality of foreign tourists and state of origin of domestic tourists. In addition, periodical tourist surveys are also being undertaken on a regular basis in order to gather data on the demographic profiles, travel pattern, use of various facilities, satisfaction levels and expenditure details of both foreign and domestic tourists visiting Kerala. The surveys provide valuable data for the formulation of policies, development planning and evolving marketing strategies. The outcome and impact of various development efforts are also evaluated through periodic evaluation studies.

11.1.1. Objectives of the Survey

The specific objectives of the survey are the following:

- (i) Origin by domicile in India for domestic tourists and nationality for foreign tourists.
- (ii) Demographic, economic, social profile of the tourists (gender, age composition).
- (iii) Capture specifically people on honeymoon, old retired couples, incentive travelers, LTC travel, etc.
- (iv) Motivational factors responsible for attracting them to Kerala.
- (v) Whether movement is rather with family including children.
- (vi) Average length of stay, expenditure pattern, etc.
- (vii) Preferences on mode of transport, food and accommodation, shopping, etc.
- (viii) Souvenir shopping.
- (ix) Awareness of wellness options (Ayurveda, Medical tourism, etc)
- (x) Estimate the number of pilgrim tourists visiting Kerala.
- (xi) Nature of such travelers, multiple destinations?
- (xii) Sticks to well defined pilgrim centers? Willingness to explore new centers?

- (xiii) Estimate the average room rent in the classified and unclassified hotels/home stays.
- (xiv) Estimate occupancy levels in properties.
- (xv) Assessment of infrastructure deficiencies.
- (xvi) Determine the type of tourism to be attracted and suggest targets of tourist arrival for important tourist destinations.
- (xvii) On the above seasonality influences.
- (xviii) Rates, occupancy and traffic in lean seasons.
- (xix) Efforts to even out seasonality factors.
- (xx) Source of occupancy (a) tour operator, (b) rack, (c) net and (d) agency.
- (xxi) Employment generated (a) full time and (b) seasonal.
- (xxii) Provide qualitative details on their overall experience such as attractions most liked, gaps in facilities, behavioral patterns of local population, interaction with transport operators, hotel staff, travel agents, government officials and law and order enforcing authorities.
- (xxiii) Profile overall level of satisfaction
- (xxiv) Conduct survey outside Kerala (generating markets) to know about the perception of tourists about Kerala, especially tourists who are not included Kerala in their travel plan.

11.1.2 Methodology

Keeping in view the objectives of the study, a survey methodology was developed with the approval of the Department. It involved the collection of primary and secondary data. Both foreign and domestic tourists were interviewed at random at the tourist destinations for the collection of primary data.

a) Selection of Tourist Destinations

Tourist destinations were selected in consultation with the DOT. The main criteria used for the selection of survey centres included volume of tourist arrivals, accessibility and coverage of different segments of tourism product. The selected tourist destinations are given in Table 11.1.1.

Table 11.1.1: District-Wise Selected Tourist Destinations

Sl. No.	District	Destination
1	Thiruvananthapuram	Thiruvananthapuram city- Varkala- Kovalam
2	Kollam	Backwaters- Thenmala
3	Kottayam	Kumarakom
4	Idukki	Munnar- Thekkady- Vagamon
5	Alappuzha	Backwaters
6	Ernakulam	Kochi- Aluva- Paravoor
7	Thrissur	Guruvayoor- Parambikulam- Athirappilly
8	Kozhikode	Kozhikode city- Kappad
9	Palakkad	Malampuzha- Nelliampathy
10	Malappuram	Nilambur
11	Kannur	Muzhappilangad
12	Wayanad	Edakkal- Pookot Lake
13	Kasaragode	Bekal
14	Pathanamthitta	Erumeli

b) Sampling

A three stage sampling scheme was used for the survey of tourists at the selected centers. At the first stage the accommodation establishments are selected after stratifying them into specific categories. In the second stage time slots were selected for the survey in each of the selected accommodation establishments. The tourists staying in each accommodation units in selected time period are requested to co-operate for the survey. The sample sizes for each of the destinations selected for the survey were decided on the basis of the tourist visits in the previous year. Separate structured questionnaires were used for the conduct of

the survey interviews of foreign tourists, domestic tourists. The survey was continued throughout the year. Separate schedules were used for the survey of foreign tourists, domestic tourists from outside the States and those from within the States.

The total sample size was 334 accommodation units distributed across the 14 districts and survey centres in the proportion of number of rooms in each centre.

Table 11.1.2: District – wise and Category – wise Sample Size

Sl. No	District	4*& above	1-3 star	Un-classified	Health Centers	House boats	Home stays	Others	Total
1	Alappuzha	1	3	4	2	21	6	4	41
2	Ernakulam	4	7	14	6	0	9	14	54
3	Idukki	1	4	12	0	0	7	2	26
4	Kannur	1	2	10	1	0	2	1	17
5	Kasargode	1	2	5	1	0	2	1	12
6	Kollam	0	2	4	2	1	1	3	13
7	Kottayam	2	2	4	1	3	1	3	16
8	Kozhikode	2	2	10	1	0	1	1	17
9	Malappuram	1	1	14	0	0	1	1	18
10	Palakkad	0	3	12	2	0	1	1	19
11	Pathanamthitta	0	2	4	1	0	1	1	9
12	Trivandrum	5	4	28	7	0	1	9	54
13	Thrissur	1	3	18	1	0	3	1	27
14	Wayanad	0	2	4	0	0	2	3	11
	Total Sample	19	39	143	25	25	38	45	334
	All Hotels	44	287	1533	382	322	820	915	4303
	Percentage	41	13	9	7	8	5.1	5.6	8

The required number of accommodation units were selected by using simple random sampling and surveyed for one week in each quarter. Thus 1/13th of accommodation establishments were surveyed in each of the 13 weeks in a quarter. In the subsequent weeks, the weeks of the survey were rotated in such a way that all the selected accommodation establishments were surveyed in four different weeks covering all the selected centres of survey. The accommodation survey included particulars of each selected establishment for the previous three months, so that, data sets were available for the entire year. The foreign and domestic tourists staying in the accommodation establishments on

the first day of the survey were listed and the relevant questionnaires were got placed in their rooms with the assistance of the hotel staff and they were persuaded to return the questionnaires duly filled – in.

The estimation formula for any variable is then as follows.

$$\hat{Y} = \frac{13}{4} \sum_{s=1}^5 \frac{m_s}{\sum_{i=1}^{m_s} \sum_{j=1}^4 \sum_{k=1}^{m_{sij}} \frac{M_s}{m_s} \frac{N_{sij}}{n_{sij}} Y_{ijk}}$$

Where Y_{ijk} is the value of k^{th} tourist in j^{th} week in i^{th} hotel of s^{th} Stratum

n_{sij} is the number of tourists surveyed j^{th} week in the i^{th} establishment of s^{th} Stratum.

N_{sij} is the total number of tourists in the j^{th} week of i^{th} establishment in the s^{th} Stratum

m_s is the number of hotels surveyed in the s^{th} Stratum

M_s is the total number of hotels in the s^{th} Stratum

The split sampling technique was used to make the questionnaires to be used for the survey simple and short so that all the data elements are covered with undue burden on the informants.

11.1.4 Age – Profile of Foreign Tourists

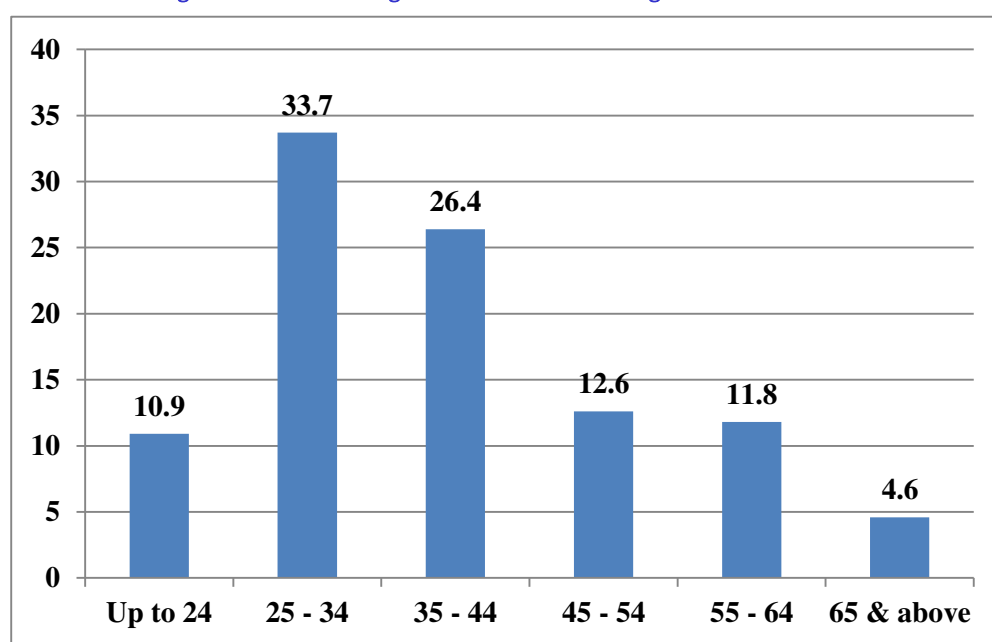
About 73 percent of the foreign tourists in Kerala belonged to the age group 25 to 54 years. Of the remaining, 10.9 percent belonged to the younger age group of age up to 24 years and 16.4 percent belonged to the older age group of 55 years and above. Percentage distribution of tourists by age group in respect of top five countries and total tourists is given in Table 11.1.4.

In the case of Saudi Arabia, the percentage share of young tourists was least at 0.1 percent. However, in the case of Australia 18.6 percent was below the age of 24 while 44.2 percent is in the age group of 25 to 34 years.

Table 11.1.4: Age – Wise Percentage Distribution of Foreign Tourists

Age Group	UK	France	Germany	USA	Saudi Arabia	Australia	Others	Total
Up to 24	11.5	9.1	8.2	14.6	0.1	18.6	11.7	10.9
25 - 34	31.9	33.4	35.3	31.4	34.3	44.2	34.3	33.7
35 - 44	25.7	30.3	22.6	25.1	32.4	20.7	25.6	26.4
45 - 54	12.8	12.4	15.1	8.2	16.5	7.6	13.8	12.6
55 - 64	11.9	9.7	13.8	11.3	16.6	4.3	11.2	11.8
65 & above	6.2	5.1	5	11.5	0.1	4.6	3.4	4.6
Total	100	100	100	100	100	100	100	100

Chart 11.1.2: Age – Wise Percentage Distribution of Foreign Tourists



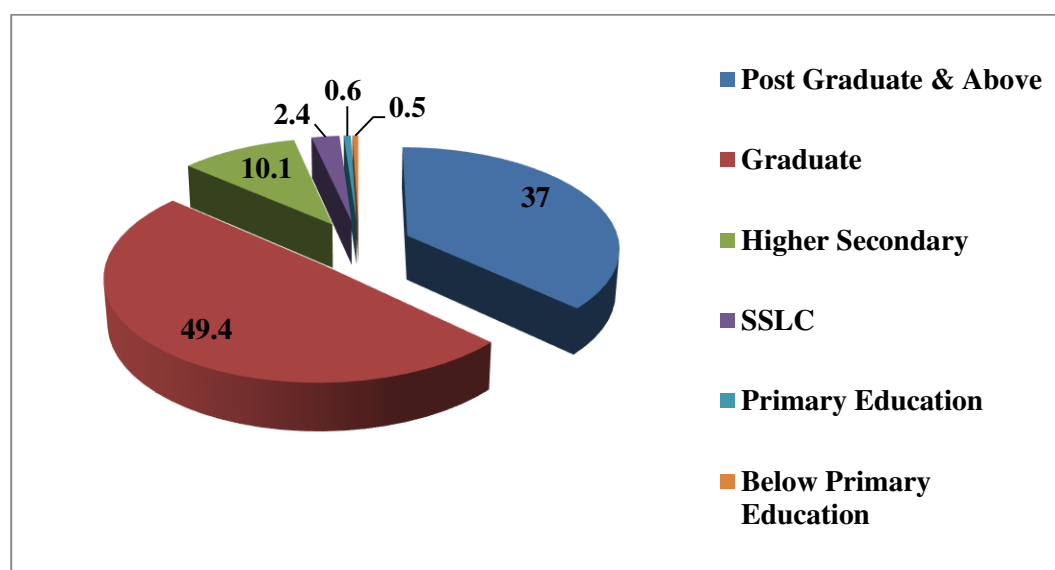
11.1.5 Educational Profile of Foreign Tourists

More than fourth quarter of foreign tourists visiting Kerala is graduates and above and of the remaining 10.1 percent has completed 12 year of schooling. In the case of Germany, 83.7 percent of the tourists were graduate and above while it was 86.3 percent in the case of USA. The details are given in Table 11.1.5.

Table 11.1.5: Percentage distribution of foreign tourists by level of education

Education Level	UK	France	Germany	USA	Saudi Arabia	Australia	Others	Total
Post Graduate & Above	45.0	28.9	35.5	35.3	25.0	32.4	38.6	37.0
Graduate	46.9	55.3	48.2	51.0	33.3	52.9	50.5	49.4
Higher Secondary	7.2	9.9	12.0	9.8	25.0	14.7	8.6	10.1
SSLC	0.0	2.6	4.2	3.9	16.7	0.0	1.2	2.4
Primary Education	0.5	2.0	0.0	0.0	0.0	0.0	0.6	0.6
Below Primary Education	0.5	1.3	0.0	0.0	0.0	0.0	0.5	0.5
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Chart 11.1.3: Percentage distribution of foreign tourists by level of education



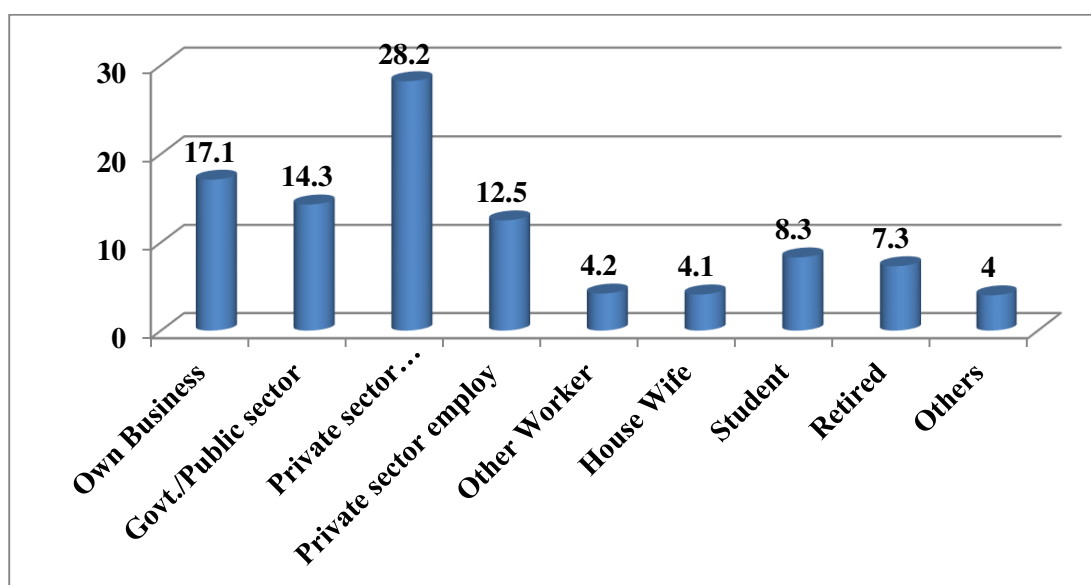
11.1.6 Activity status of Foreign Tourists

Nearly 59.6 percent of the foreign tourists visiting Kerala belong to the elite class of business men, Govt. employees or company executives. About 4.2 percent belong to the worker class while 7.3 percent of them are retired employees. Students and housewives constituted 12.4 percent. The distribution of foreign tourists by activity status is given in Table 11.1.6.

Table 11.1.6: Percentage Distribution of Foreign Tourists by Activity Status

Activity Status	UK	France	Germany	USA	Saudi Arabia	Australia	Others	Total
Own Business	14.5	10.2	11.7	19.4	63.8	6.8	17.6	17.1
Govt./Public sector	16.6	10.4	15.3	11.8	0.1	14.7	16.2	14.3
Private sector Company Executive	31.8	36.6	29.7	17.6	7.5	33.6	26.9	28.2
Private sector employ	10.4	20	10.3	17.2	6.3	9.5	12.2	12.5
Other Worker	2.8	3.4	6.1	2.3	6.8	5.4	4.6	4.2
House Wife	2.1	0.5	2.6	7.6	8.1	4.5	5.3	4.1
Student	7.5	5.1	8.3	12.6	0.1	15.3	8.3	8.3
Retired	8.7	11.2	10.6	9.6	7.2	4.2	4.8	7.3
Others	5.6	2.6	5.4	1.9	0.1	6	4.1	4
Total	100	100	100	100	100	100	100	100

Chart 11.1.4: Percentage distributions of foreign tourists by activity status



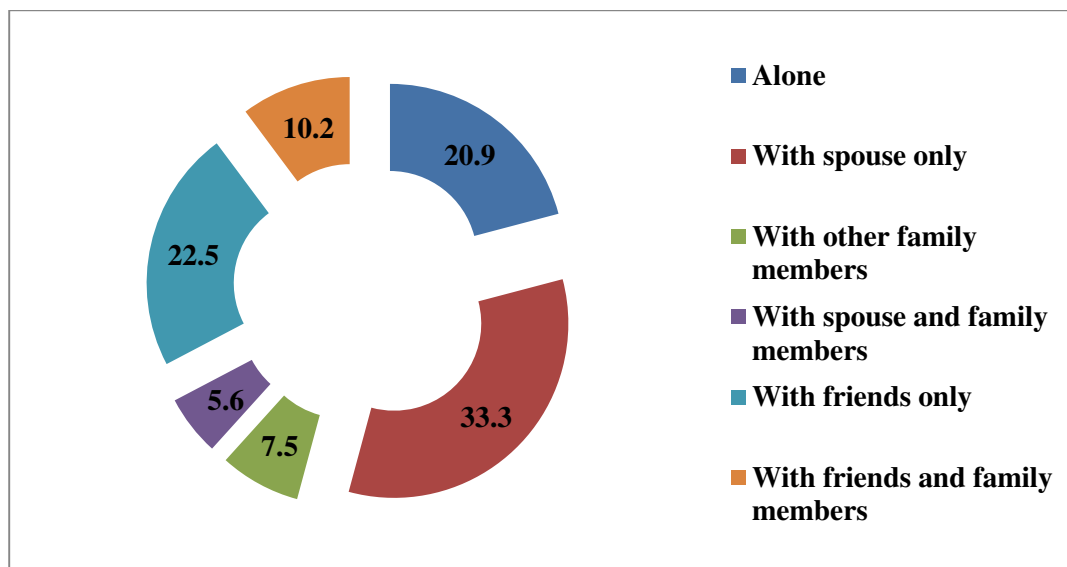
11.1.7 Travel Behavior of Foreign Tourists

The travel behavior of foreign tourists visiting Kerala by type of tour, accompanying members, mode of transport, etc. were analyzed, and it is noted that about 74.2 percent of the tourists were non-package tourists. Package tourists constituted only 25.8 percent. While 20.9 percent of the foreign tourists travelled alone, about 33.3 percent travelled with spouse and another 5.6 percent travelled with spouse and other family members. About 22.5 percent travelled with friends only. The distribution of foreign tourists by type of accompanying members is given in Table 11.1.7.

Table 11.1.7: Percentage Distribution of Foreign Tourists by Accompanying Members

Travel With	UK	France	Germany	USA	Saudi Arabia	Australia	Others	Total
Alone	13.8	16.0	18.3	20.4	55.5	24.2	22.5	20.9
With spouse only	36.7	27.3	27.2	34.7	10.7	47.5	31.4	33.3
With other family members	5.7	5.3	5.0	12.2	9.3	6.4	9.9	7.5
With spouse and family members	4.8	14.0	0.8	6.1	24.5	0.0	5.9	5.6
With friends only	22.4	27.3	37.1	22.4	0.0	16.2	20.2	22.5
With friends and family members	16.7	10.0	11.6	4.1	0.0	5.7	10.0	10.2
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Chart 11.1.5: Percentage Distribution of Foreign Tourists by Accompanying Members

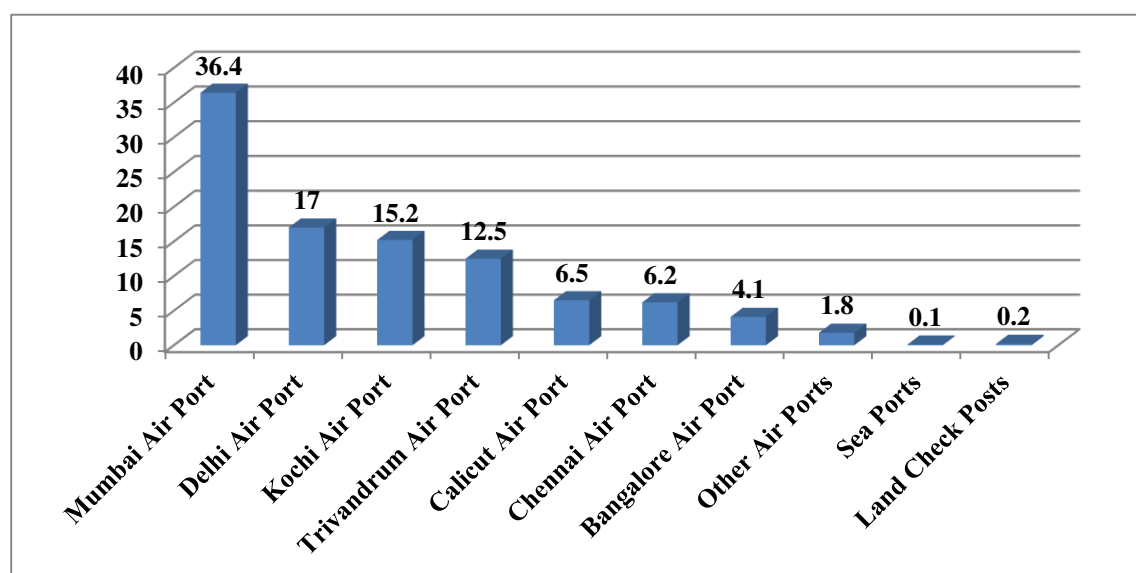


While 44.7 percent of the foreign tourists arrived in Kerala directly from their country of origin, and 55.3 percent came to Kerala from other cities in India. The percentage distribution of foreign tourists by port of disembarkation is given in Table 11.1.8.

Table 11.1.8: Percentage Distribution of Foreign Tourists by Port of Entry

Port of Entry	Percentage Share
Mumbai Air Port	36.4
Delhi Air Port	17.0
Kochi Air Port	15.2
Trivandrum Air Port	12.5
Calicut Air Port	6.5
Chennai Air Port	6.2
Bangalore Air Port	4.1
Other Air Ports	1.8
Sea Ports	0.1
Land Check Posts	0.2
Total	100

Chart 11.1.6: Percentage Distribution of Foreign Tourists by Port of Entry



The mode of transport to India by the foreign tourists visiting Kerala was predominantly air transport. While about 99.7 percent travelled by air only 0.3 percent travelled by other means.

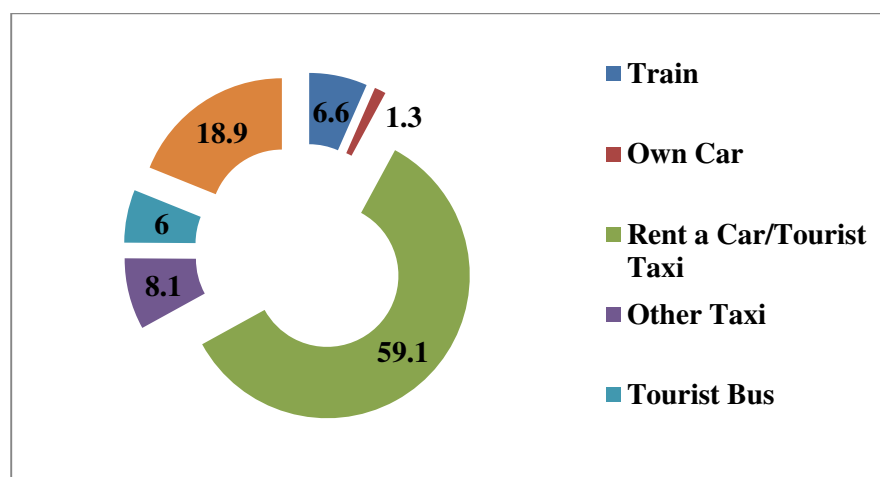
11.1.9. Mode of travel of foreign tourists in Kerala

Analysis of mode of travel in side Kerala of foreign tourists show that about 59 percent of the foreign tourist are traveling in side Kerala by Rent a car/Tourists Taxi. Train and Tourist buses are least favorable mode of travel of foreign tourists. Details are given in Table 11.1.9

Table 11.1.9: Mode of travel of foreign tourists

Mode of Transport In Kerala	Percentage Share
Train	6.6
Own Car	1.3
Rent a Car/Tourist Taxi	59.1
Other Taxi	8.1
Tourist Bus	6.0
Other Buses	18.9
Total	100

Chart 11.1.7: Mode of travel of foreign tourists in Kerala



11.1.10. Source of Information of Foreign Tourists

The most prominent sources of information of foreign tourists visiting Kerala were (i) Indian/Kerala tourism websites (26.0%), (ii) Print media advertisements (21.0%), (iii) travel books and magazines (15.2%), (iv) Own knowledge/experience (9.7%) (v) Friends and relatives (9.2%), (vi) general books, magazines and newspapers (11.2%). Details are given in Table 11.1.10.

Table 11.1.10: Source of information of foreign tourists

Main source of information about Kerala Tourism	Percentage Share
Airlines	0.2
Friends and relatives	9.2
General book, magazines and news papers	11.2
Indian/Kerala tourism websites	26.0
Own Knowledge/experience	9.7
Print Media Advertisements	21.0
Radio/Television Advertisements	1.2
Road shows and exhibitions	0.1
Tourist Offices	2.7
Travel agents/Tour operators	2.1
Travel books and magazines	15.2
Others	1.4
Total	100

11.1.11. Purpose of visit of Foreign Tourists

The main purpose of visit of about 87 percent of the tourists visiting Kerala was leisure, recreation and holiday. Yet another 3.1 percent visited Kerala for health treatment. The distribution of foreign tourists by purpose of visit is given in Table 11.1.11.

Table 11.1.11: Percentage Distribution of Foreign Tourists by Purpose of Visit

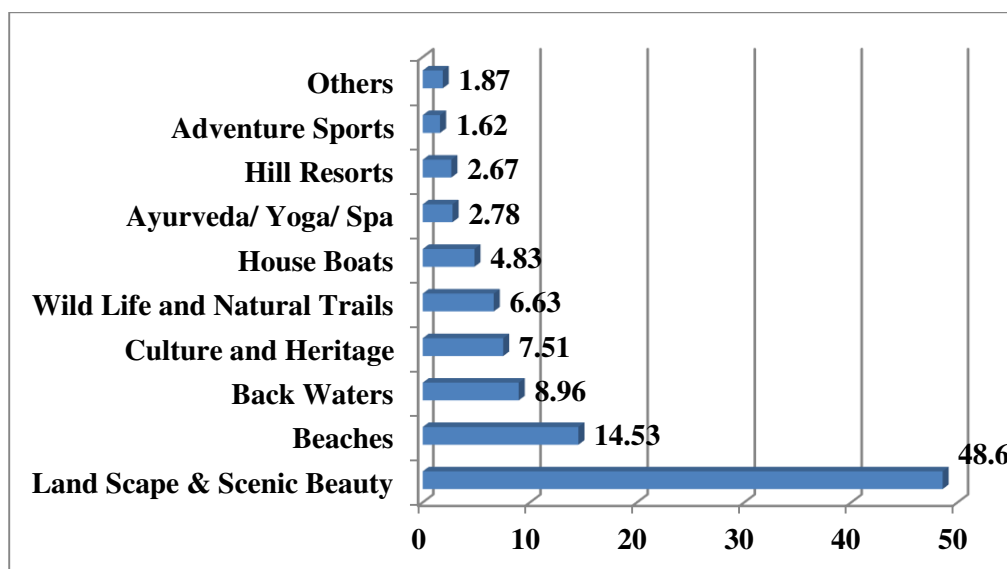
Main Purpose of Visit	UK	France	Germany	USA	Saudi Arabia	Australia	Others	Total
Leisure, Recreation & Holiday	95.7	85.5	95.1	86.5	66.7	82.4	85.2	87.3
Business/Conference /Meeting	3.3	7.2	0.0	3.8	8.3	2.9	3.7	3.9
Visiting Friends/Relatives	0.5	0.7	0.0	5.8	8.3	0.0	0.9	1.3
Education/Training	0.5	2.0	0.0	0.0	0.0	0.0	2.3	1.3
Health/Treatment	0.0	2.6	3.3	0.0	16.7	2.9	3.4	3.1
Pilgrimage/Religious	0.0	0.0	1.6	3.8	0.0	5.9	2.6	1.7
Others	0.0	2.0	0.0	0.0	0.0	5.9	2.1	1.4
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Among those who visited Kerala for the purpose of leisure and holiday, the main attractions were (i) landscape and scenic beauty (ii) beaches, (iii) backwaters, (iv) culture and heritage and (v) wild life and natural trails. The distribution of foreign leisure tourists by main attraction is given in Table 11.1.12.

Table 11.1.12: Percentage Distribution of Leisure Tourists by main Source of Attraction

Main Attraction	Percentage Share
Land Scape & Scenic Beauty	48.60
Beaches	14.53
Back Waters	8.96
Culture and Heritage	7.51
Wild Life and Natural Trails	6.63
House Boats	4.83
Ayurveda/ Yoga/ Spa	2.78
Hill Resorts	2.67
Adventure Sports	1.62
Others	1.87
Total	100

Chart 11.1.8: Percentage Distribution of Leisure Tourists by main Source of Attraction



Among those who visited Kerala for health / treatment, about 48 percent visited for Ayurvedic treatment and another 39 percent visited for other traditional systems of treatment.

11.1.12 Evaluation of Tourism Products and Services

An effort has been made through the survey to evaluate the level of appreciation/ satisfaction of foreign tourists about various tourism products and services in Kerala. The responses of the tourists were recorded on a five point scale from excellent to poor in respect of various tourism products and facilities.

11.1.12.1 Typical Tourism Products

Among the typical tourism products of Kerala, Yoga Retreat, Typical Kerala cuisine and Ayurvedic wellness centres received relatively better ratings as 22.7 percent, 21.3 percent and 19.1 percent of the tourists rated them excellent, yet another 28 percent of the tourists rated typical Kerala cuisine as very good while in the case of Wellness Spa 21.3 percent of the tourists rated it as very good. Beauty Spa as well as craft centers got relatively low ratings. About 2.3 percent of the tourists rated the quality of theatres and cultural shows as poor. The relative ratings are given in Table 11.1.13.

Table 11.1.13: Percentage Distribution of Foreign Tourists by Ratings of Tourism Products.

Tourism Product/Facility	Percentage of Tourists					
	Poor	Average	Good	Very Good	Excellent	Total
Ayurvedic wellness centres	0.7	8.7	50.8	20.7	19.1	100
Yoga retreat	0.3	9.0	48.4	19.6	22.7	100
Wellness spa	1.3	10.1	55.5	21.3	12.1	100
Beauty Spa	1.7	11.4	54.0	22.0	10.9	100
Gym and Fitness Centres	0.4	10.7	69.4	14.8	4.7	100
Museums and art galleries	0.6	5.3	63.6	18.3	12.2	100
Theatres and cultural shows	2.3	9.2	56.4	22.3	9.8	100
Craft centres	0.9	11.8	57.8	21.4	8.1	100
Performing arts of Kerala	0.4	5.8	54.8	27.8	11.2	100
Martial arts of Kerala	0.9	4.7	63.1	18.9	12.4	100
Kerala paintings & drawings	0.7	8.7	54.8	20.7	15.1	100
Typical Kerala cuisine	0.2	6.2	44.3	28.0	21.3	100

11.1.12.2 Tourism Infrastructure Services

The qualities of various tourism infrastructure services are assessed and the results are given in Table 3.12. The quality of tourist accommodation and services in accommodation establishments are considered to be excellent by 15.2 percent and 16.1 percent of the tourists respectively. About 30 percent of the tourists rated them to be very good. Thus accommodation facilities and services were considered to be excellent or very good by over one-third of the tourists. However, room tariff is considered to be excellent by 10.9 percent of the tourists through another 32.4 percent of the tourists considered it as very good. The choice and quality of food in restaurants are rated as excellent by 8.5 percent and 10.3 percent of the tourists respectively. About 33.2 percent and 32.4 percent of the tourists considered them to be very good. Price of food items is also considered to be excellent by 13.0 percent of the tourists and as very good by 28.8 percent of them. Thus about 40 percent of the tourists rated restaurant facilities as excellent or very good.

Internal travel facilities received relatively low ratings. Train and bus internal travel services are considered to be excellent only by 5.1 and 3.8 percent of the tourists respectively while 6.7 percent considered taxi services as excellent. The percentage of tourists considering train, bus and taxi services excellent or very good are 35.7 percent, 32.6 percent and 35.1

percent respectively. These facilities were considered as average or poor by 10.9 percent, 12.9 percent and 7.1 percent respectively.

Houseboats received a better rating, while water sports and boating received a comparatively low rating. While 15.8 percent of the tourists rated houseboats as excellent, only 7.8 percent rated water sports and boating as excellent. However, 46.1 percent and 31.9 percent of the tourists respectively rated them to be excellent or very good.

The shopping experience of the tourists in Kerala was not very encouraging. Only 3.7 percent, 4.4 percent and 3.8 percent of the tourists rated choice of products, choice of souvenirs and prices of items as excellent respectively. However, 60.6 percent, 55.2 percent and 52.6 percent of the tourists rated the above aspects of shopping only as good.

Table 11.1.14: Percentage Distribution of Foreign Tourists by Ratings of Tourism Infrastructure

Tourism Facility/Activity	Percentage of Tourists					
	Poor	Average	Good	Very Good	Excellent	Total
Quality of accommodation	0.2	4.2	47.9	32.5	15.2	100
Quality of services in accommodation	0.6	4.1	43	36.2	16.1	100
Room Tariff	0.2	6.3	50.2	32.4	10.9	100
Choice of food in restaurants	1.2	6.9	50.2	33.2	8.5	100
Quality of food in restaurants	0.9	6.8	49.6	32.4	10.3	100
Price of food items	1.9	6	49.3	29.8	13	100
Train services for internal travel	2.4	8.5	53.4	30.6	5.1	100
Bus services for internal travel	1.8	11.1	54.5	28.8	3.8	100
Taxi services for internal travel	0.5	6.6	57.8	28.4	6.7	100
House boats	0.3	3.3	50.3	30.2	15.9	100
Water sports and boating	1.2	6.1	56.8	28.1	7.8	100
Choice of products for shopping	2.1	13.7	60.6	19.9	3.7	100
Choice of Souvenirs	2.8	19.1	55.2	18.5	4.4	100
Prices of Shopping items & Souvenirs	2.1	17.8	52.6	23.7	3.8	100

11.1.12.3 Accessibility and on– site facilities

In general accessibility and on – site facilities received comparatively low ratings by the tourists. The entry/exit procedure and drinking water facilities only were considered as excellent by 7 and 4.2 percent of the tourists respectively. In respect of all other facilities, the percentage of tourists giving excellent rating was less than ten percent. While 47.5 percent of the tourists rated toilet facility as average or poor, about 29.8 percent of the tourists rated signage's as average or poor. Even information facility at the tourists spots were considered as average or poor by 24.9 percent of the tourists. Cleanliness/hygiene as well as up keep and maintenance of tourist spots were reported to be average or poor by 36.5 and 32.8 percent respectively.

Table 11.1.15: Percentage Distribution of Foreign Tourists by Ratings of Access and On– site Facilities.

Tourism Attributes	Percentage of Tourists					
	Poor	Average	Good	Very Good	Excellent	Total
Accessibility	1.8	21.3	49.7	22.3	4.9	100
Entry/Exit procedure	3	23.7	50.4	15.9	7	100
Cleanliness/hygiene	8.3	28.2	44.6	14.3	4.6	100
Upkeep and maintenance	2.8	30	49.3	14.3	3.6	100
Toilet facility	14.2	33.3	38.8	11.2	2.5	100
Drinking water facility	12.4	29.3	38.6	15.5	4.2	100
Signage	6.9	22.9	57.6	11.2	1.4	100
Information facility	3.1	21.8	59.4	12.8	2.9	100
Guide services	4.3	25.6	45.7	20.4	4	100
Other on-site facilities	4.4	25.2	48.3	18.6	3.5	100

11.1.12.4. Evaluation of Service Personal

The satisfaction of levels of foreign tourists with the service personal of different industry segments was also assessed through the survey on a five point scale. The service of hotel staff and restaurant staff were assessed as excellent or very good by 47.5 percent and 41.9

percent of the tourists respectively. In the case of staff of travel agents and tour operators only 13.2 percent and 13.1 percent of the tourists assessed their services excellent although 36.8 percent and 44.0 percent of the tourists assessed their services either excellent or very good. The behavior of general public was assessed to be excellent by 14.6 percent of the tourists and as very good by another 28.6 percent of the tourists.

The services of information staff were assessed to be just good by 50.3 percent of the tourists and as average by 14.0 percent of them. Similarly services of security agencies also received low ratings with 52.4 percent rating it as good and another 17.4 percent rating it as average. About 1.2 percent of the tourists also assessed the services of the security agencies as poor. The distribution of foreign tourists by level of satisfaction of services of the personnel of different industry segments is given in Table 11.1.16.

Table 11.1.16: Percentage Distribution of Foreign Tourists by Ratings of Service Personal.

Tourism Service Industry	Percentage of Tourists					
	Poor	Average	Good	Very Good	Excellent	Total
Hotel staff	0.3	7.7	44.5	31.9	15.6	100
Restaurant staff	0.7	9.3	48.1	29.2	12.7	100
Travel Agents staff	1.8	10.3	51.1	23.6	13.2	100
Tour/Transport operator staff	1.8	13	41.2	30.9	13.1	100
Information centre staff	1.4	14	50.3	26.5	7.9	100
Security agencies staff	1.2	17.4	52.4	19.7	9.3	100
General public	0.3	10.4	46.2	28.6	14.6	100

11.1.12.5. Overall Satisfaction of Foreign tourists

On the whole, 56.1 percent of the tourists were very much satisfied with their present trip. About 16.2 percent of them were fairly satisfied while 26.1 percent was just satisfied. About 0.9 percent of the tourists were fairly dissatisfied. Details are given in Table 11.1.17.

Table 11.1.17: Overall Satisfaction of Foreign Tourists

Overall Level of Satisfaction	Percentage
Very Much Satisfied	56.1
Fairly satisfied	16.2
Satisfied	26.1
Fairly dissatisfied	0.9
Very much dissatisfied	0.8
Total	100

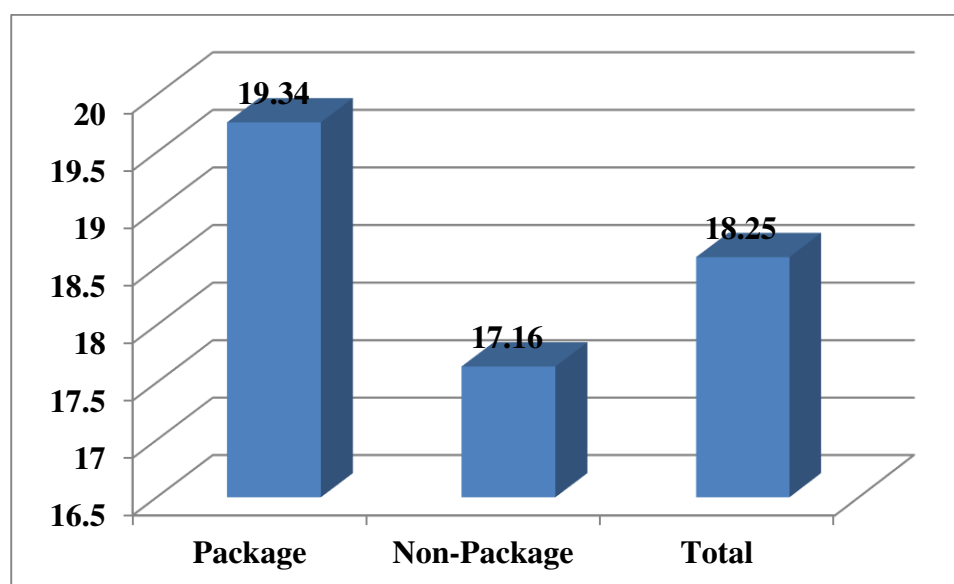
11.1.13. Average Duration of stay of Foreign Tourists

The average duration of stay of foreign tourist is 18.25 days. Foreign tourists visiting Kerala as package tours stays here on an average of 19.34 days at the same time the average duration of stay of Non-package foreign tourists is 17.16.

Table 11.1.18: Duration of Stay of Foreign Tourists

Type of tour	Average Duration of Stay
Package	19.34
Non-Package	17.16
Total	18

Chart 11.1.9: Duration of Stay of Foreign Tourists



11.1.14. Class distribution of duration of stay of foreign tourists

A study on the class distribution of duration of stay of foreign tourists shows that 52.24 percent of the foreign tourist stays at Kerala for 16 to 20 days. In the analysis of duration of stay it is found that about 53.18 percent of the tourists from USA stay in Kerala for 16 to 20 days. Australia is another significant country in the case of duration of stay. Only 14.22 percent of tourists from Saudi Arabia stay in Kerala for 16 to 20 days. The details are given in Table 11.1.19.

Table 11.1.19: Class distribution of Percentage share of duration of stay of foreign tourist by state of origin

Country	Less than 5 days	6 to 10 days	11 to 15 days	16 to 20 days	21 to 25 days	More than 25 days	Total
UK	0.83	7.16	38.64	48.72	3.83	0.82	100
France	6.35	16.71	35.48	38.34	2.51	0.61	100
Germany	4.34	8.23	37.15	47.13	2.52	0.45	100
USA	4.72	18.12	21.34	53.18	2.31	0.33	100
Saudi Arabia	3.46	61.43	19.38	14.22	1.21	0.30	100
Australia	11.67	9.76	18.02	58.56	1.31	0.68	100
Others	0.68	11.13	30.62	52.13	4.51	0.93	100
Total	2.34	12.14	28.47	52.24	4.26	0.55	100

11.1.15. Average Expenditure per Foreign Tourist

The average expenditure per day per tourists during 2012 – 13 is estimated to be Rs.4496. While per day expenditure of package tourists in Kerala per tourist is estimated to be 3603, in the case of non-package tourists it is estimated to be Rs.4938.

11.1.16. Class Distribution of percentage share of per day expenditure

An analysis of class distribution of percentage share of per day expenditure of foreign tourists shows that 53.75 percent of foreign tourist spends rupees 3000 to 5000 per day. 64.58 percent of tourist from UK also belongs to the above mentioned group. Only 7.21 percent of the foreign tourist spend more than rupees 7000 per day. The details are given in Table 11.1.20.

Table 11.1.20: Class distribution of percentage share of per day expenditure of foreign tourists

Per Day Expenditure	UK	France	Germany	USA	Saudi Arabia	Australia	Others	Total
Below 1000	6.07	15.04	6.47	6.32	14.69	14.96	8.92	9.21
1000 to 3000	20.76	14.21	21.26	34.21	66.11	20.23	26.01	24.96
3000 to 5000	64.58	62.43	56.63	44.18	16.67	43.54	53.84	53.75
5000 to 7000	2.05	4.18	4.73	11.48	1.03	13.16	4.87	4.87
More than 7000	6.54	4.14	10.91	3.81	1.50	8.11	6.36	7.21
Total	100	100	100	100	100	100	100	100

11.1.17. Expenditure break-up of foreign tourists

An item wise break-up of expenditure of various products, services and facilities shows that 31.67 percent of the total expenses of foreign tourist is spent on Accommodation facilities. 27.38 percent spent to meet the travel expenses within Kerala, 12.15 percent is spent for food and beverages. Foreign tourists are spending 9.41 percent of their total expenditure for shopping. Details are given in the Table 11.1.21.

Table 11.1.21: Expenditure break-up of foreign tourists

Sl. No.	Item	Expenditure Percentage
1	Travel to Kerala ,if any, excluding inter-state travel	5.34
2	Travel within Kerala	27.38
3	Accommodation	31.67
4	Restaurants-food and beverage	12.15
5	Tourist spots	2.62
6	Entertainment	4.53
7	Shopping	9.41
8	Treatment/ Wellness	6.34
9	Other expenses, if any	0.56
Total		100

11.1.18. Foreign Tourist Visits across the Districts

The most popular places of foreign tourist visits in Kerala are Ernakulum, Trivandrum, Idukki and Alappuzha. The percentage share of each tourist place is given in the Table 11.1.22.

Table 11.1.22: Foreign Tourist Visits across the Districts

Sl. No	District	USA	France	Germany	UK	Saudi Arabia	Australia	Others	Total
1	Trivandrum	66.24	43.56	60.83	80.76	0.06	65.62	69.64	63.87
2	Kollam	6.75	8.81	7.26	9.13	0.00	1.86	9.72	8.35
3	Pathanamthitta	0.00	0.00	0.00	0.65	0.00	0.00	0.29	0.25
4	Alappuzha	48.69	49.73	44.42	46.21	29.83	42.14	53.67	49.31
5	Kottayam	11.31	11.34	19.84	12.51	6.02	11.01	12.64	12.91
6	Ernakulam	58.21	92.53	79.23	94.04	35.92	137.57	78.26	82.57
7	Idukki	44.55	87.25	55.05	77.37	41.17	24.24	58.81	62.67
8	Thrissur	0.91	5.96	8.17	4.10	0.00	16.38	6.71	5.93
9	Palakkad	0.93	7.15	1.52	3.80	0.00	0.00	3.73	3.43
10	Malappuram	0.92	1.18	0.00	0.89	17.64	0.00	1.56	1.83
11	Kozhikode	11.21	4.56	9.53	3.85	70.67	25.53	9.12	11.20
12	Wayanad	17.47	15.89	11.85	5.90	29.48	12.76	11.57	12.14
13	Kannur	0.00	0.40	1.53	2.05	11.76	9.09	4.02	3.22
14	Kasargode	1.83	3.97	2.04	4.40	0.00	0.00	3.26	3.06
Percentage of visits to Arrivals		269.02	332.33	301.27	345.66	242.55	346.20	323.20	320.74

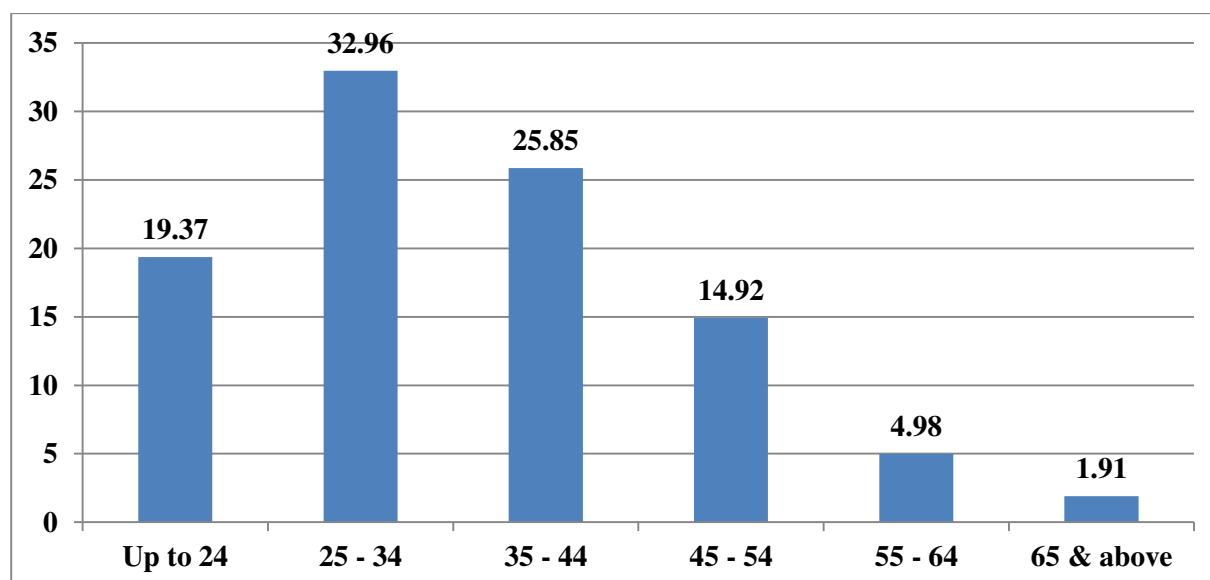
11.1.20. Age – Profile of Domestic Tourists

The age profile of the domestic tourists reveals the dominance of younger age groups. While 32.94 percent of them belonged to the age group 25-34, 25.85 percent and 19.37 percent belonged to the next higher and lower age groups of 35-44 and up to 24 respectively. Thus about 78.16 percent of the domestic tourists were aged below 45 years. The age – group wise distribution of domestic tourists by major states is given in Table 11.1.24.

Table 11.1.24: Percentage Distribution of Domestic Tourists by Age Group and State of Origin

Sl. No.	State	Age Group						Total
		Up to 24	25 - 34	35 - 44	45 - 54	55 - 64	65 & above	
1	Kerala	20.08	31.90	25.80	15.70	4.84	1.67	100
2	Tamilnadu	19.00	33.99	27.61	12.72	4.51	2.18	100
3	Karnataka	13.85	41.39	24.85	11.00	5.99	2.92	100
4	Maharastra	17.24	32.02	27.98	13.30	6.31	3.15	100
5	Andra Pradesh	13.22	38.64	22.52	17.36	5.58	2.69	100
6	Delhi	9.13	41.08	24.48	14.11	7.88	3.32	100
7	Others	22.83	32.59	24.19	13.05	4.94	2.39	100
Total		19.37	32.96	25.85	14.92	4.98	1.91	100

Chart 11.1.10: Percentage Distribution of Domestic Tourists by Age Group



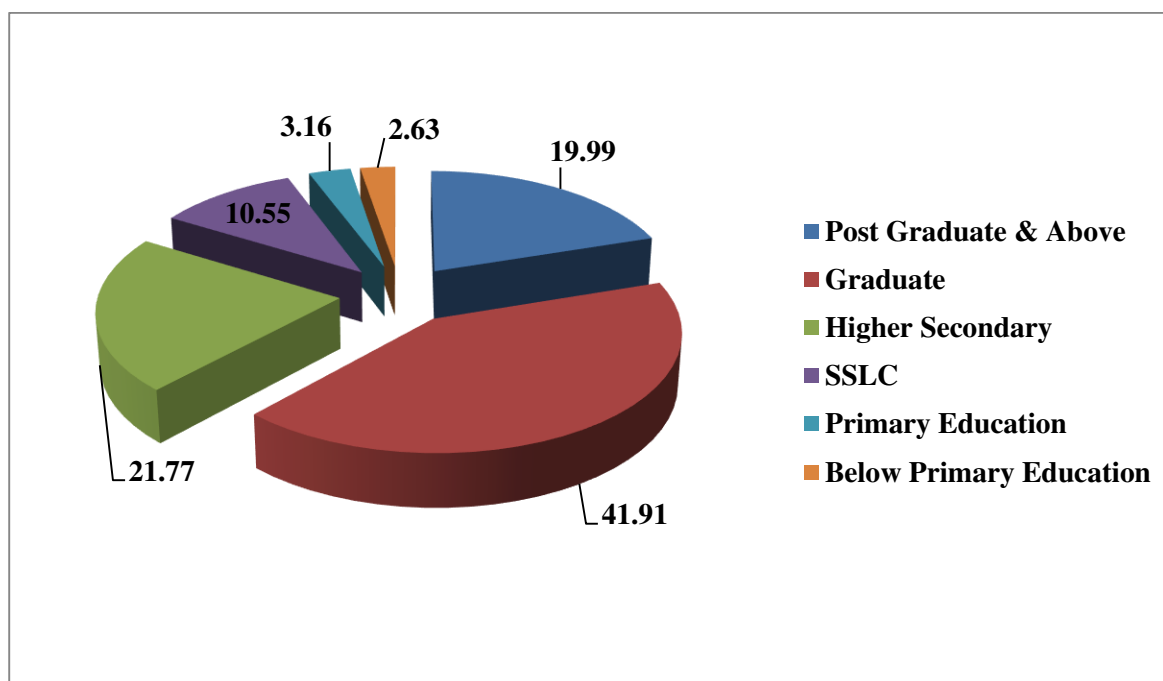
11.1.21. Educational Profile of Domestic tourists

About two – third of the domestic tourists visiting Kerala are graduate and above. The percentage distribution of domestic tourists by overall level of education is given in Table 4.25. In the case of Andhra Pradesh, about 34.72 percent of the tourists had post graduate and above qualifications while another 44.44 percent was graduates.

Table 11.1.25: Percentage Distribution of Domestic Tourists by Level of Education

Sl. No.	State	Post Graduate & Above	Graduate	Higher Secondary	SSLC	Primary Education	Below Primary Education	Total
1	Kerala	17.27	40.93	24.11	11.87	3.16	2.67	100
2	Tamilnadu	22.21	45.70	18.48	7.66	3.51	2.44	100
3	Karnataka	29.92	46.69	10.04	6.82	2.37	4.17	100
4	Maharastra	36.23	43.01	12.50	5.08	2.12	1.06	100
5	Andra Pradesh	34.72	44.44	11.11	4.17	2.08	3.47	100
6	Delhi	31.03	47.13	13.22	0.00	7.47	1.15	100
7	Others	29.44	39.47	17.43	9.05	3.07	1.53	100
Total		19.99	41.91	21.77	10.55	3.16	2.63	100

Chart 11.1.11: Percentage Distribution of Domestic Tourists by Level of Education



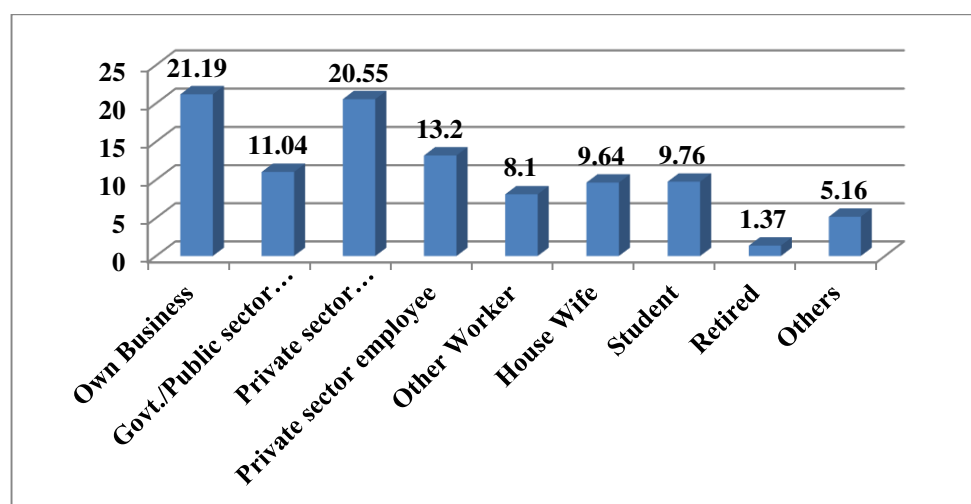
11.1.22. Activity status of Domestic tourists.

About 20.55 percent of the domestic tourists visiting Kerala was company executives in the private sector while 21.19 percent had own business. Further, 11.04 percent was government public sector employees and 13.2 percent was private sector employees. The distribution of domestic tourists by activity status state of origin is given in Table 11.1.26.

Table 11.1.26: Percentage Distribution of Domestic Tourists by Activity Status

State	Own Business	Govt./Public sector employee	Private sector Company executive	Private sector employee	Other Worker	House Wife	Student	Retired	Others	Total
Kerala	21.40	10.78	18.61	13.58	9.27	9.05	10.00	1.40	5.91	100
Tamilnadu	19.65	9.14	25.27	13.10	5.83	12.17	10.15	1.22	3.46	100
Karnataka	19.92	12.49	27.55	13.54	4.29	10.20	7.44	1.72	2.86	100
Maharashtra	22.08	10.42	28.13	10.83	2.08	11.46	10.42	1.25	3.33	100
Andhra Pradesh	16.61	12.46	31.83	9.34	4.50	14.53	6.92	0.69	3.11	100
Delhi	23.39	17.54	25.15	11.11	1.75	6.43	11.70	1.75	1.17	100
Others	23.82	16.95	22.62	9.50	5.44	10.99	7.46	0.95	2.26	100
Total	21.19	11.04	20.55	13.20	8.10	9.64	9.76	1.37	5.16	100

Chart 11.1.12: Percentage Distribution of Domestic Tourists by Activity Status



11.1.23. Travel Pattern of Domestic Tourists

The travel behavior of domestic tourists by type of tour, accompanying members, “Mode of Travel, etc. was analysed and the results are indicates in the following paragraph

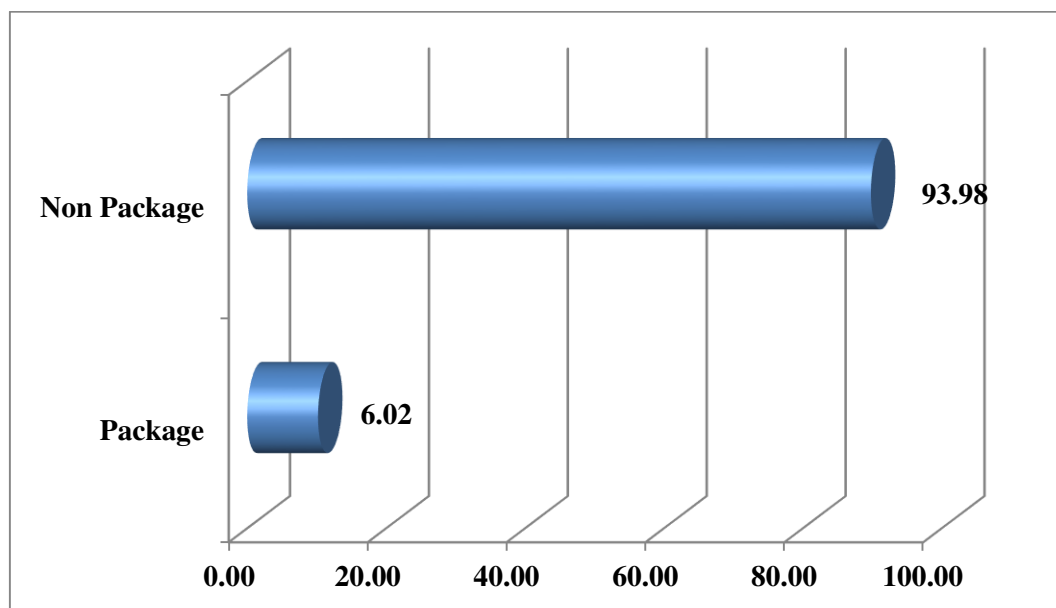
11.1.23.1. Type of Tour

In the aggregate, about 6.2 percent of the domestic tourists were package tourists. However, if the tourists from the Kerala state are excluded, the percentage of package tourists becomes 11.27 percent. The state – wise distribution of package and non-package tourists by state of origin is given in Table 11.1.27. In terms of percentage share of packages tourists, Andhra Pradesh tops the list with 20.81 percent package tourists. It is followed by Delhi with 18.39 percent package tourists. In the case of Keralites, the percentage share of package tourists is only 4.19percent.

Table 11.1.27: Distribution of Domestic Tourists by Type of Tour.

State	Package		Total
	Yes	No	
Tamilnadu	7.94	92.06	100
Karnataka	6.23	93.77	100
Maharastra	13.33	86.67	100
Andra Pradesh	20.81	79.19	100
Delhi	18.39	81.61	100
Others	20.02	79.98	100
Sub Total	11.27	88.73	100
Kerala	4.19	95.81	100
Total	6.02	93.98	100

Chart 11.1.13: Distribution of Domestic Tourists by Type of Tour



11.1.23.2. Accompanying members.

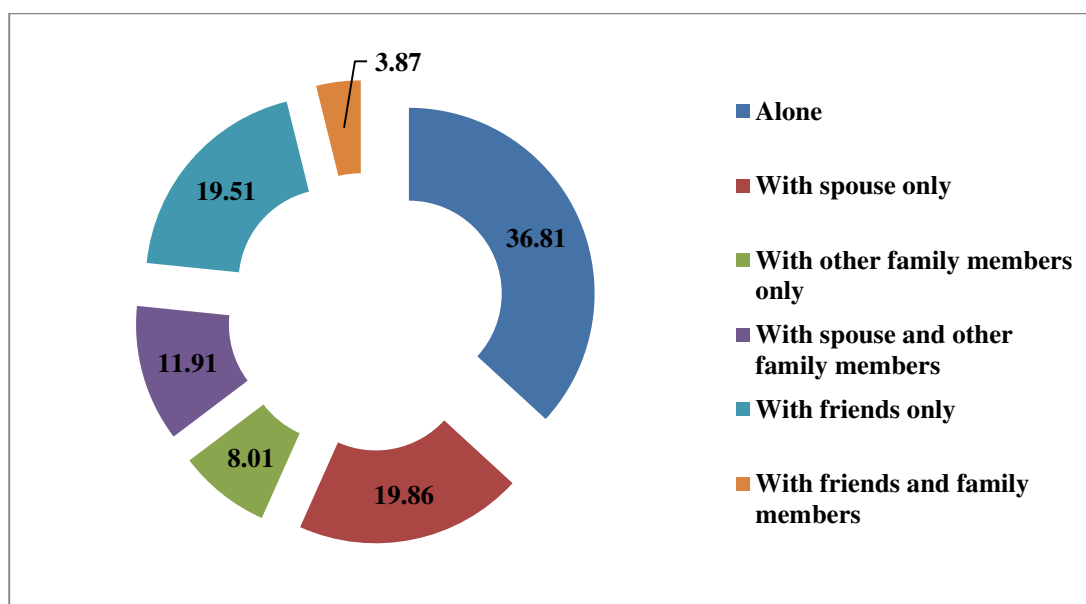
About 36.81 percent of the domestic tourists travel alone. Those travelling with spouse or other members of the family constitute about 39.78 percent. Among them, 19.86 percent travels with spouse only, while 8.01 percent travels with other family members. Those travelling with friends only constitute 19.51 percent while 3.87 percent travels with friends and family members. The percentage distribution of domestic tourists by types of accompanying members and by states is given in Table 11.1.28.

The pattern of travel is somewhat different in the case of tourists from Kerala as 40.39 percent of them travel alone and those travelling with spouse or other members of the family are only 35.27.

Table 11.1.28: Companion – wise profile of domestic tourists

State	Alone	With spouse only	With other family members only	With spouse and other family members	With friends only	With friends and family members	Total
Kerala	40.39	16.40	7.77	11.10	20.74	3.57	100
Tamilnadu	28.53	26.06	10.04	11.43	19.07	4.88	100
Karnataka	29.55	28.59	8.66	14.44	15.59	3.18	100
Maharashtra	22.92	36.04	10.83	14.17	8.33	7.71	100
Andhra Pradesh	23.97	37.33	5.48	19.52	9.59	4.11	100
Delhi	22.99	32.76	3.45	21.26	19.54	0.00	100
Others	21.72	32.53	6.68	17.17	15.54	6.37	100
Total	36.81	19.86	8.01	11.91	19.51	3.87	100

Chart 11.1.14: Companion – wise profile of domestic tourists



11.1.23.3. Inter – state Travel

A little over a quarter of the domestic tourists visit other states also during their current trip. About 30.86 percent of the tourists from Delhi undertake interstate trip, although in the case of Tamilnadu, only 20.99 percent of the tourists combine their Kerala visit with tourist centres in other states. The percentage of domestic tourists combining other states with Kerala trip is given in Table 11.1.29.

Table 11.1.29: Percentage of domestic tourists visiting other states

State	Yes	No	Total
Kerala	8.99	91.01	100
Tamilnadu	20.99	79.01	100
Karnataka	21.95	78.05	100
Maharashtra	27.01	72.99	100
Andhra Pradesh	26.80	73.20	100
Delhi	30.86	69.14	100
Others	41.40	58.60	100
Total	13.33	86.67	100

11.1.23.4. Travel in Kerala

The mode of travel of both Keralites and Non-Keralites tourists are analysed and the following results are obtained.

11.1.23.4.1 Non-Keralites

About 38.73 percent of the non-Keralites tourists are using rent a car/tourists taxi facility. The details are given in Table 11.1.30

Table 11.1.30: Percentage distribution of mode of travel in Kerala of Non-Keralites tourists

Mode of Travel	Percent
Train	12.85
Own Car	12.82
Rent a Car/Tourist Taxi	38.73

Other Taxi	8.54
Tourist Bus	4.30
Other Buses	22.76
Total	100

11.1.23.4.2 Keralites

About 21.94 and 46.15 percent of the Keralites domestic tourist preferred own car and other buses respectively to travel in Kerala. The details are given in Table 11.1.31.

Table 11.1.31: Percentage distribution of mode of travel in Kerala of Keralites tourists

Mode of Travel	Percent
Train	13.39
Own Car	21.94
Rent a Car/Tourist Taxi	10.19
Other Taxi	4.61
Tourist Bus	3.73
Other Buses	46.15
Total	100

11.1.24. Sources of Information of Domestic Tourists

The most prominent source of information for the domestic tourist is own knowledge/experience and it accounted for more than one-fourth of the tourists. The second major source of information was friends and relatives with 20.84 percent share. General books, magazines and newspapers were the third largest source of information. The distribution of domestic tourists by source of information is given in Table 11.1.32.

Table 11.1.32: Percentage distribution of domestic tourists according to source of information

Main source of information	Percentage of domestic tourists
Print media advertisements	10.54
Radio/ television advertisements	3.50
Indian/ Kerala tourism websites	7.41
Road shows and exhibitions	0.92
General books, magazines and news papers	10.82

Travel books and magazines	7.55
Tourist offices	1.40
Airlines	0.17
Travel agents/ Tour Operators	2.19
Friends and relatives	20.84
Own knowledge/ experience	29.96
Others	4.72
Total	100

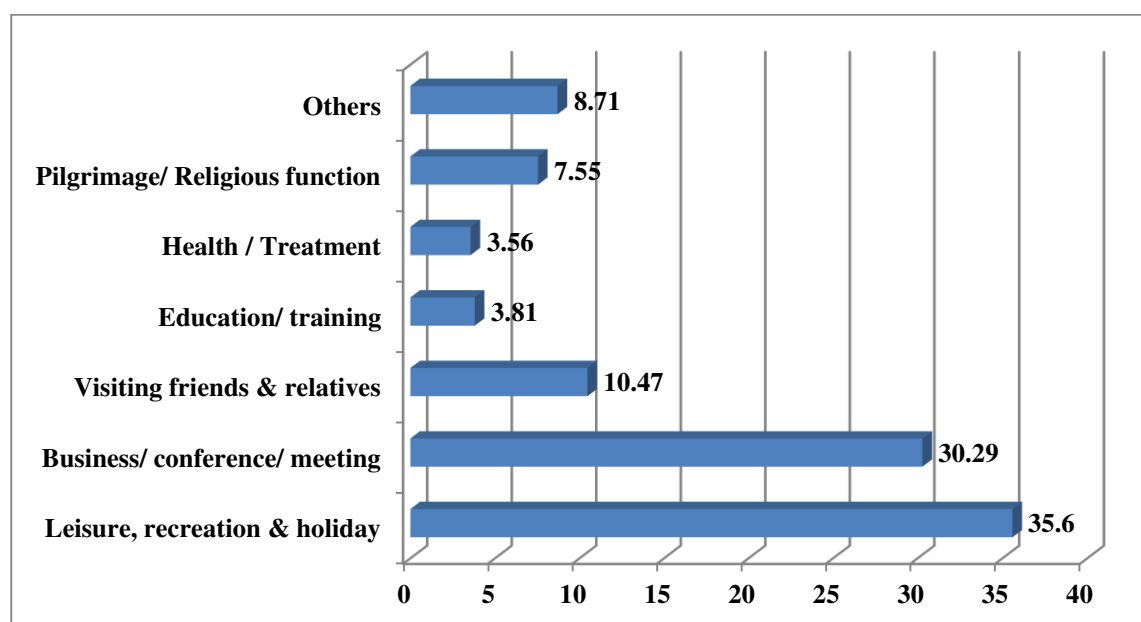
11.1.25. Purpose of visit of Domestic tourists

The main purpose of visit of domestic tourists was leisure, recreation and holiday with a share of 35.60 percent of tourists. Yet another 30.29 percent of the tourists visit Kerala for business/conferences/meeting. About 10.47 percent of the tourists visit Kerala for visiting friends and relatives while 3.81 percent visit for education/training and 3.56 percent visit for pilgrimage/religious function. The distribution of tourists by purpose of visit and state is given in Table 11.1.33.

Table 11.1.33: Main Purpose of visit of domestic tourists

State	Leisure, recreation & holiday	Business/ conference/ meeting	Visiting friends & relatives	Education/ training	Health / Treatment	Pilgrimage/ Religious function	Others	Total
Kerala	28.90	32.83	11.83	4.29	3.71	8.01	10.43	100
Tamilnadu	50.32	24.41	6.90	3.84	2.56	7.90	4.06	100
Karnataka	52.47	25.05	6.07	2.18	1.99	7.40	4.84	100
Maharashtra	58.97	20.82	6.80	0.21	2.89	5.77	4.54	100
Andhra Pradesh	59.26	19.53	4.04	2.69	3.70	6.40	4.38	100
Delhi	63.79	27.59	4.02	0.00	0.00	1.72	2.87	100
Others	62.00	17.89	8.23	1.45	7.40	1.86	1.17	100
Total	35.60	30.29	10.47	3.81	3.56	7.55	8.71	100

Chart 11.1.15: Main Purpose of visit of domestic tourists

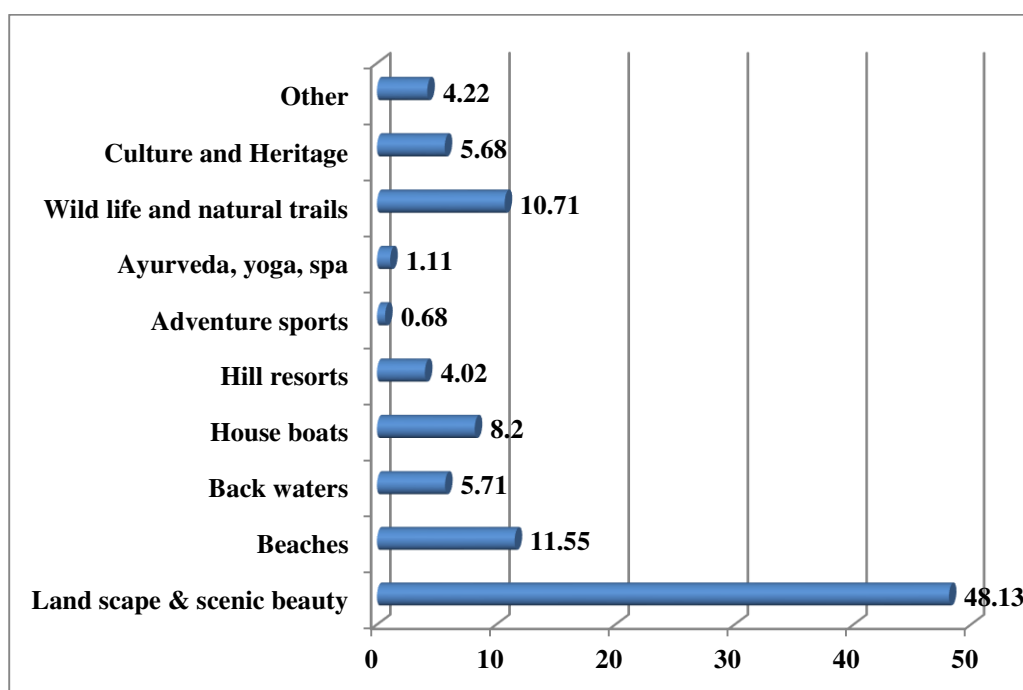


Among those who visited Kerala for leisure and holiday, the main source of attraction was landscape and scenic beauty for 48.13 percent of the leisure tourists. It was followed by beaches with 11.55 percent tourists and Wild life and natural trails with 10.71 percent of tourists. The distribution of leisure tourists by main source of attraction is given in Table 11.1.34.

Table 11.1.34: Percentage Distribution of Leisure Tourists by main Source of Attraction

State	Percentage Share
Land scape & scenic beauty	48.13
Beaches	11.55
Back waters	5.71
House boats	8.2
Hill resorts	4.02
Adventure sports	0.68
Ayurveda, yoga, spa	1.11
Wild life and natural trails	10.71
Culture and Heritage	5.68
Others	4.22
Total	100

Chart 11.1.16: Percentage Distribution of Leisure Tourists by main Source of Attraction



11.1.26. Evaluation of tourism Products and services

The satisfaction and ratings of various tourism products and services by the domestic tourists has also been assessed on a five point scale from excellent to poor and the responses are summarised in the following paragraphs.

11.1.26.1. Typical tourism products

Among the typical tourism products of Kerala, ayurvedic wellness centres have been assessed as excellent by 16 percent of the tourists, while 23.88 percent of the domestic tourists assessed it as very good. Thus about 40 percent of the domestic tourists rated ayurvedic wellness centres as either excellent or very good. Kerala paintings & drawings of Kerala was also rated as excellent by 17.1 percent of the domestic tourists while 30.92 percent of the tourists assessed it as very good. Performing arts and martial arts of Kerala were rated as excellent by 14.6 percent domestic tourists. Beauty spa and Gym and fitness centres, museum and art galleries, theatres and cultural shows and craft centres received relatively low ratings. The percentage distribution of tourists by ratings of typical tourism products is given in Table 11.1.35.

Table 11.1.35: Percentage Distribution of Domestic Tourists by Ratings of Tourism Products

Tourism Product/Facility	Percentage of Tourists					
	Poor	Average	Good	Very Good	Excellent	Total
Ayurvedic wellness centres	1.49	10.68	47.95	23.88	16.00	100
Yoga retreat	2.10	17.04	46.47	25.81	8.58	100
Wellness spa	3.18	18.11	45.68	24.33	8.71	100
Beauty Spa	2.44	22.42	45.20	21.63	8.31	100
Gym and Fitness Centres	2.96	22.24	43.22	24.21	7.37	100
Museums and art galleries	1.53	15.25	44.54	29.20	9.48	100
Theatres and cultural shows	2.65	14.20	54.37	21.47	7.31	100
Craft centres	1.78	18.19	51.89	21.03	7.11	100
Performing arts of Kerala	1.29	7.05	47.29	29.77	14.60	100
Martial arts of Kerala	1.28	6.45	46.50	30.89	14.87	100
Kerala paintings & drawings	1.25	8.77	41.96	30.92	17.10	100
Typical Kerala cuisine	1.28	9.06	46.97	30.55	12.13	100

11.1.26.2. Tourism Infrastructure services

The quality of accommodation and services in accommodation establishments are rated to be excellent by about 8 percent of the domestic tourists. About 25.47 percent and 25.26 percent of the tourists rated them to be very good. However, room tariff was rated to be excellent only by 6.95 percent of the tourists.

Houseboats are rated to be excellent by 12.6 of the domestic tourists, while 30.91 percent of the tourists rated it as very good.

Train and bus services for internal travel received relatively low ratings. While about 23 percent of the tourists rated train services average or poor, about 21 percent of the

domestic tourists rated bus services as average or poor. The distribution of domestic tourists by ratings of various tourism infrastructure services is given in Table 11.1.36.

Table 11.1.36: Percentage Distribution of Domestic Tourists by Ratings of Tourism infrastructure

Tourism Facility/Activity	Percentage of Tourists					
	Poor	Average	Good	Very Good	Excellent	Total
Quality of accommodation	0.15	12.59	53.76	25.47	8.03	100
Quality of services in accommodation	0.61	14.13	51.98	25.26	8.02	100
Room Tariff	1.50	21.69	46.54	23.31	6.95	100
Choice of food in restaurants	2.07	20.17	45.78	24.27	7.71	100
Quality of food in restaurants	3.36	21.59	47.61	21.00	6.45	100
Price of food items	5.16	23.34	44.67	19.84	6.98	100
Train services for internal travel	4.06	18.59	51.12	21.26	4.98	100
Bus services for internal travel	2.33	18.38	55.53	20.04	3.72	100
Taxi services for internal travel	0.75	15.89	53.01	24.53	5.82	100
House boats	3.16	9.60	43.72	30.91	12.60	100
Water sports and boating	4.26	17.16	45.27	25.98	7.33	100
Choice of products for shopping	5.04	22.51	47.04	20.67	4.74	100
Choice of Souvenirs	7.54	27.25	47.56	13.98	3.66	100
Prices of Shopping items & Souvenirs	11.09	31.36	41.39	12.18	3.98	100

11.1.26.3 Accessibility and satisfaction

Accessibility and on site facilities received comparatively low rating. None of the facilities were rated as excellent even by ten percent of the tourists. Up-keep and maintenance of tourist spots and toilet facilities were rated as average or poor by 42.5 percent and 53.32 percent of the domestic tourists respectively. Other on site facilities were rated as average or poor by 33.83 percent of the tourists while signage and information facilities are rated as

average or poor by 50.82 and 40.59 percent of the tourists respectively. The percentage distribution of tourists by rating of on-site facilities is given in Table 4.37.

Table 11.1.37: Percentage Distribution of Domestic Tourists by Ratings of Accessibility and on – site Facilities

Tourism Attributes	Percentage of Tourists					
	Poor	Average	Good	Very Good	Excellent	Total
Accessibility	4.26	27.43	43.44	16.79	8.08	100
Entry/Exit procedure	4.53	29.51	41.51	17.83	6.62	100
Cleanliness/hygiene	10.16	32.15	40.24	12.01	5.44	100
Upkeep and maintenance	9.84	32.66	39.32	13.50	4.67	100
Toilet facility	17.51	35.81	33.60	10.19	2.87	100
Drinking water facility	15.37	33.12	36.16	12.28	3.06	100
Signage	13.74	37.08	38.14	9.38	1.66	100
Information facility	11.59	29.00	43.79	12.85	2.76	100
Guide services	9.05	26.54	46.42	15.01	2.98	100
Other on-site facilities	6.23	27.60	47.57	15.26	3.34	100

11.1.26.4. Evaluation of Service Personal

The satisfaction level of domestic tourists with the service personnel of different industry segments was assessed through the survey on a five point scale. In general, the staff of information centres and security agencies was not rated as excellent by at least ten percent of the domestic tourists. About 19.52 percent of the domestic tourists rated hotel staff as average or poor and 20.34 percent of them rated restaurant services as average or poor. The percentage distribution of domestic tourists by ratings of service personnel is given in Table 4.38.

Table 11.1.38: Percentage Distribution of Domestic Tourists by Ratings of Service Personal

Tourism Service Industry	Percentage of Tourists					
	Poor	Average	Good	Very Good	Excellent	Total
Hotel staff	0.85	18.67	49.45	24.48	6.55	100
Restaurant staff	1.22	19.12	47.80	25.80	6.07	100
Travel Agents staff	3.21	19.70	50.15	22.62	4.31	100
Tour/Transport operator staff	4.10	18.07	49.39	23.70	4.73	100
Information centre staff	8.22	25.44	41.22	21.01	4.11	100
Security agencies staff	5.49	28.76	42.67	19.43	3.64	100
General public	2.56	15.62	48.36	25.94	7.52	100

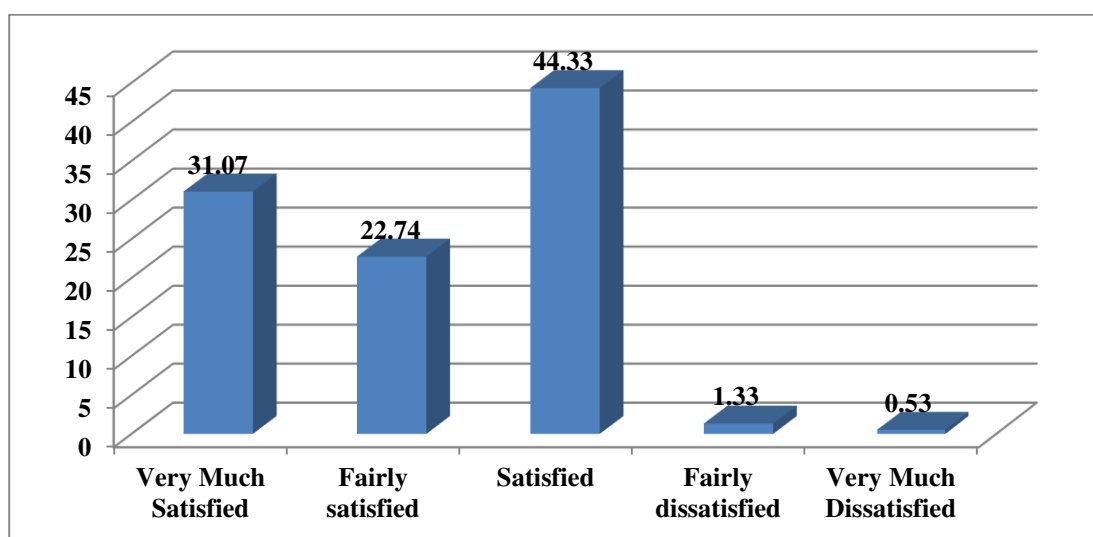
11.1.26.5 Overall satisfactions of Domestic Tourists

On the whole 31.07 percent of the domestic tourists were very much satisfied with the tour in Kerala. About 22.74 percent was fairly satisfied and 44.33 percent was satisfied. Fairly dissatisfied and very much dissatisfied domestic tourists were comparatively very less. The maximum percentages of dissatisfied tourists are from Maharashtra and it was about 2.88 percent. Details are given in Table 4.39.

Table 11.1.39: Percentage Distribution of Domestic Tourists by Overall level of satisfaction

State	Very Much Satisfied	Fairly satisfied	Satisfied	Fairly dissatisfied	Very Much Dissatisfied	Total
Kerala	29.82	23.59	44.58	1.49	0.52	100
Tamilnadu	33.98	18.68	46.12	0.78	0.44	100
Karnataka	34.65	20.41	43.98	0.76	0.19	100
Maharashtra	34.71	22.12	40.29	1.44	1.44	100
Andhra Pradesh	31.20	18.64	47.78	1.70	0.68	100
Delhi	29.24	23.56	46.05	0.57	0.58	100
Others	39.58	22.85	36.23	0.56	0.77	100
Total	31.07	22.74	44.33	1.33	0.53	100

Chart 11.1.17: Percentage Distribution of Domestic Tourists by Overall level of satisfaction



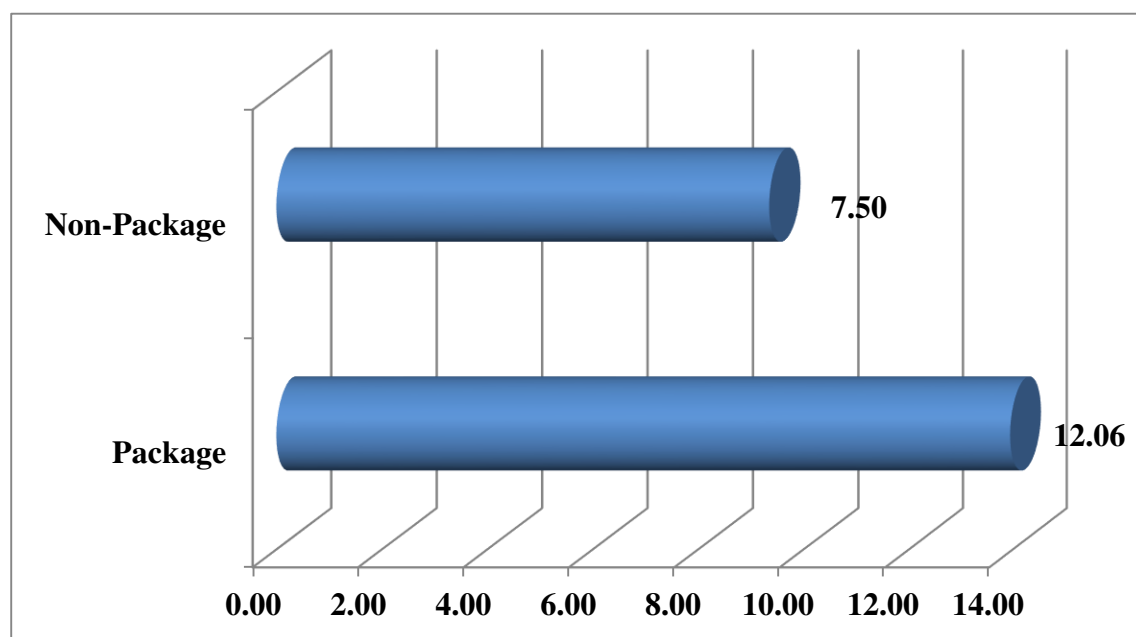
11.1.27. Duration of stay of Domestic Tourists

The average duration of stay of domestic tourist is 7.87 days. Total domestic tourists visiting Kerala as package tours stays at Kerala on an average of 12.06 days and non-package domestic tourist's stays at Kerala on an average of 7.5 days. The average duration of stay of Keralites domestic tourists with package is 9.87 and that of non-package is 8.65. Total average duration of stay of Keralites domestic tourists is 8.79 days. The average duration of stay of Non-Keralites domestic tourists with package is 14.45 and that of non-package is 8.29. Total average duration of stay of Non-Keralites domestic tourists is 8.29days.

Table 11.1.40.: Percentage distribution of tourists by duration of stay

Average Duration of Stay			
Particulars	Package	Non-Package	Total
Non- Keralites Domestic Tourists	14.45	8.29	8
Keralites Domestic Tourists	9.87	8.65	9
Total Domestic Tourists	12.06	7.50	8

Chart 11.1.18: Duration of stay of domestic tourist



11.1.28. Percentage distribution of duration of stay by state of origin

About 66 percent of the total domestic tourists lie in the class interval 6 to 10 days. 44.82 percent of tourist comes from Delhi stay in Kerala for less than 5 days. 69.57 percent of Keralites tourist takes tours with duration from 6 to 10 days. The details are given in Table 4.41.

Table 11.1.41: Class distribution of Percentage share of duration of stay of domestic tourist by state of origin

State	Less than 5 days	6 to 10 days	11 to 15 days	16 to 20 days	21 to 25 days	More than 25 days	Total
Andhra Pradesh	31.78	58.22	5.48	3.63	0.89	0.00	100
Karnataka	42.97	53.65	2.28	0.42	0.25	0.43	100
Kerala	26.32	69.57	1.93	0.89	0.31	0.98	100
Maharashtra	30.18	63.56	2.78	1.70	1.00	0.78	100
Tamilnadu	37.56	58.95	0.60	1.79	0.90	0.20	100
Delhi	44.82	49.46	4.33	0.70	0.68	0.01	100
Others	33.35	55.87	6.95	1.84	0.92	1.07	100
Total	29.28	66.30	2.10	1.05	0.37	0.90	100

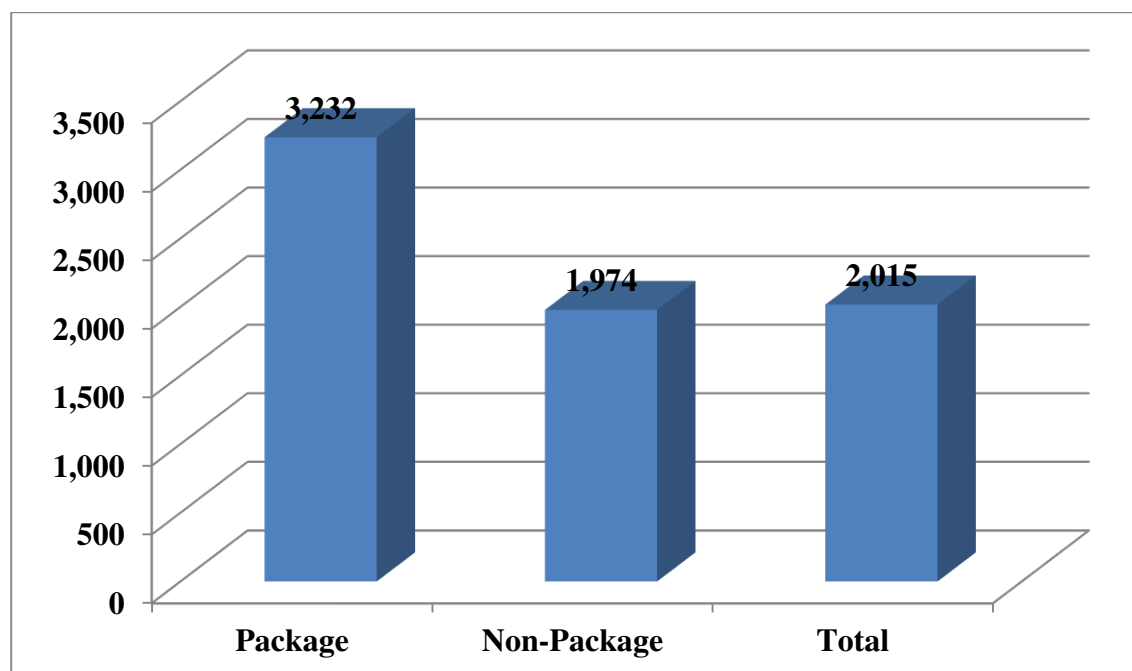
11.1.29. Average Expenditure per Tourist

The average per day expenditure per Keralites Domestic tourist is Rs.1,290, while it is Rs.2792 in the case of Non – Keralites domestic tourists. The details are given in Table 4.42

Table 11.1.42: Average Expenditure per Domestic Tourists

Per day Per Person Expenditure			
Particulars	Package	Non-Package	Total
Non- Keralite Domestic Tourists	3,226	2,783	2,792
Keralites Domestic Tourists	3,440	1,278	1,290
Total Domestic Tourists	3,232	1,974	2,015

Chart 11.1.19: Per day per person expenditure of Domestic Tourists



11.1.30. Class distribution of per day expenditure of domestic tourists

A study on the per day expenditure of domestic tourist shows that about 67 percent of the domestic tourist spent Rs.1000 to 3000. 25.97 percent of the Keralites tourists spends below

1000 rupees in a day. 68.76 percent of domestic tourist coming from Maharashtra spent rupees 1000 to 3000 per day in Kerala. The details are given in Table 11.1.43.

Table 11.1.43: Class distribution of per day expenditure of domestic tourists

State	Below 1000	1000 to 3000	3000 to 5000	5000 to 7000	More than 7000	Total
Kerala	25.97	67.53	4.72	1.20	0.58	100
Tamilnadu	21.65	65.30	8.65	3.72	0.68	100
Karnataka	14.04	71.58	11.24	2.24	0.90	100
Maharashtra	14.83	68.76	12.63	2.38	1.40	100
Andhra Pradesh	9.76	68.30	15.11	5.47	1.36	100
Delhi	16.13	64.42	9.36	7.95	2.14	100
Others	16.51	67.21	11.65	3.92	0.71	100
Total	23.54	67.61	6.34	1.83	0.68	100

11.1.31. Expenditure break-up of Domestic tourists

About 33.18 percent of the total expenses of Domestic tourists is spent to accommodation in Kerala. Travel within Kerala share 22.53 percent of the total expense of Domestic tourist. Next important item is Restaurants – food and beverages, 15.18 percent of total expenditure is spent for it. Details are given in Table 11.1.44

Table 11.1.44: Expenditure break-up of Domestic tourists

Sl. No.	Item	Expenditure Percentage
1	Travel to Kerala ,if any, excluding inter-state travel	5.00
2	Travel within Kerala	22.53
3	Accommodation	33.18
4	Restaurants-food and beverage	15.18
5	Tourist spots	3.16
6	Entertainment	4.93
7	Shopping	11.56

8	Treatment/ Wellness	2.29
9	Other expenses, if any	2.17
Total		100

11.1.32. Domestic Tourist Visits across the Districts

The most popular places of domestic tourist visits in Kerala are Ernakulam, Idukki and Trivandrum. Wayanad came fourth with a share of 18.27 percent. The percentage share of each tourist place is given in the Table 11.1.45.

Table 11.1.45: Domestic Tourist Visits across the Districts

Sl. No	District	Kerala	Tamil-nadu	Karnataka	Maharashtra	Andhra Pradesh	Delhi	Others	Total
1	Trivandrum	18.52	33.63	31.21	42.83	33.43	65.93	44.71	23.67
2	Kollam	1.92	5.43	5.72	7.31	6.73	2.5	6.81	3
3	Pathanamthitta	1.35	2.32	2.57	0.36	4.93	1.22	0.72	1.51
4	Alapuzha	9.83	22.36	26.61	45.57	38.62	29.15	40.3	15.22
5	Kottayam	6.73	10.27	10.18	12.78	16.23	12.96	12.67	8.73
6	Ernakulam	26.78	52.42	50.14	67.22	55.48	86.93	57.54	34.95
7	Idukki	29.25	61.34	46.73	88.78	78.85	72.04	84.96	39.09
8	Thrissur	10.73	17.56	15.13	11.47	14.23	19.87	9.52	11.94
9	Palakkad	12.41	18.13	9.73	6.19	8.83	2.95	6.28	12.29
10	Malapuram	11.27	5.72	4.64	1.28	5.55	7.43	5.41	9.64
11	Kozhikode	15.47	10.37	9.76	5.98	5.57	13.38	16.57	13.74
12	Wayanad	18.83	14.56	27.72	3.85	1.62	2.77	6.43	18.27
13	Kannur	19.84	7.12	10.34	5.05	4.7	3.64	6.84	16.47
14	Kasargode	11.24	4	5.21	2.01	9.63	2.1	5.43	9.76
Total		194.17	265.23	255.69	300.68	284.4	322.87	304.19	218.3

CHAPTER 12



**Financial Assistance
Provided by
Department of Tourism**

12.1 FINANCIAL ASSISTANCE PROVIDED BY DEPARTMENT OF TOURISM TOURISM DURING 2013 –2014

The Kerala Tourism provided financial assistance to various tourism related initiatives during the year 2013-14. The following table gives the project-wise and purpose-wise details of financial assistance provided by Department of Tourism during 2013-14.

SI No	Project Name	Amount in lakhs
1	Preparation of Master Plan for Golden Valley in Trivandrum	44
2	Preparation of Master Plan for Kalady-Malayattoor-Athirapally Tourism Circuit	44
3	Preparation of Masterfor Ashtamudi in Kollam District	38
4	Preparation of Master Plan for Kakkayam-Peruvannamuzhy	42.31
5	Preparation of Master Plan for Nilambur	42
6	Nalambalam Pilgrim Circuit, Thrissur	396
7	Construction of Hanging bridge at Thumboormuzhi - Prakrithigramam	497
8	Light and Sound show at St.Angelo Fort, Kannur	358
9	Purchase of Life Savings equipment to Life Guardes	31.79
10	Sewage treatment plant and procurement of battery operated vehicle for Vechicular traffic regulation in PTR	500
11	Parking Solution and Related facilities at Anavachal, Thekkady ”	500
12	Beautification of Ambedkar park at North Paravur	150
13	Development of Walkway at Kumbalam, Ernakulam	149
14	Development of Parunthupara-Grambi Tourist centre at Peerumedu, Idukki	149
15	Improvements to Kovalam First approach road from Ch: 0/000 to 2/080 km	182
16	Improvements to Kovalam Second approach road from 0/000 to 0/800 km	158
17	Upasana Junction to Harbour Road Improvement at Kovalam	44
18	Cultural and Tourist facility centre, Kovlam	175

19	Silent Valley sunbath Park at Kovalam	468
20	Museum of Cultural Mosaic- Mattanchery	492
21	Revamping of Kovalam beach lighting system	162
22	Kovalam Tourism Zone Waste Management Programme	33.21
23	Upgradation of Jungle Camping facilities at Gavi Ecotourism	135
24	Renovation of South Beach Park at Bekal, Kasargod	138
25	Purchase of New House boats for Valiyaparamba backwaters, Bekal	138
26	Refurbishing of two house boats at Valiyaparamba backwaters, Bekal	28.5
27	Setting up of Heritage walkway at Fort Kochi	487
28	Tourism facilitation Centre at Mananthavady	200
29	Social tourism project at Sri Satyasai Orphanage Trust at Trivandrum	168
30	Developing water based Transport infrastructure at Kochi Marine drive	283
31	Construction of Tourist Interpretation Centre, Common conference hall & Car parking area at Park View building, Directorate of Tourism	57
32	Development of Velliyamkallu in Thrithala, Palakkad as a Tourist Destination - II Phase	140
33	Development of 'Mini Pampa' River view at thavanoor, Malappuram	68
34	Development of Meenvallam at Palakkad	232
35	Development of Wayside Amenity centre at Kakkayam, Kozhikode	95
36	Way side Amenity centre Nellarachal, Wayanad	37
37	Development of Infrastructural facilities for Travel & Trekking circuit at Aruvikara, kallar, Ponmudi, Peppara and Neyyar dam.	40
38	Setting up of Wayside facility centre at Vamanapuram	136
39	Development of Cherumbu Eco Village in Kruvarakundu, Malappuram	195
40	Revamping of boat jetty at Thanthonnithuruthu, Ernakulam	69.93687
41	House boat Tracking and Safety Management system	158
42	Development of Walk way and Parking facilities from BOT bridge to Alexander Parambithara bridge at NH 47A in Willington Island	50

43	Literary Tourism Destination at Kumarakodi	480
44	Snake boats- Tourism Product Development	200
45	Development of Thirumullavaram Beach, Kollam	160
46	Pampakuda Tourism Circuit- Areeckal water falls Amenity Centre & Arjunmala Lighting	32.86
47	Development of Pandanadu as a Tourist Destination	149.99146
48	Development of Cheranai Tourism Udyan at Nilambur road, Cherani(Phase 1 & Phase 2)	248.57
49	Bapuji Children's Park Sreekrishnapuram	100
50	Civil and electrical works for the construction of electrical room at Kottakkunnu Maithanam	13.79341
51	Business re-modelling and suggested solutions for KTDC Properties and for the cooperation as a whole	20
53	Sevana Nauka- beached boat tourist amenity centre at Kovalam beach	70
54	Waste handling Solar boat for Alappuzha backwater	38
55	Setting up of Winch operated Beach Parasailing	126
56	Visa on Arrival Social Media Campaign	53.00
58	Kerala Sea plane project- Administrative and Miscellaneous Expenses required for Waterdromes	253.5
59	Kerala Sea Plane Project-Additional Equipments like Sinages, CCTV, Surveillance System	162
60	Kerala Sea Plane Project - Setting up Control room for Centralised monitoring	45
61	Kerala Sea Plane Project- Promotional Measures and launch	234.5
62	Setting up of waterdrome at Wayanad & balance work at other locations for SeaplaneProject	279
63	Setting up of lounge and Information counters at Airports	37.7
65	Electrification work for the Additional Block of Guest House, Sulthan Bathery	40.08895
66	SITC of 8 passenger lift in Government guest house Thycad, Trivandrum	27
67	SITC of Air Handling units in Lobbies, mini banquet hall and Standardisation of control panels for Air conditioner units etc. at Government Guest House, Thycad, Trivandrum	33.5

68	Construction of Conference hall at Guest House, Kottayam	110
69	Renovation of Guest House Old Block, Kozhikode (Phase 1)	70
70	Renovation of Housekeeping room, Pantry and Toilets at Guest House, Thycaud, Thiruvananthapuram	22
71	Urgent Repairs - Preventing leakage in the old Palace Building at Guest House, Aluva	26.5
73	Construction of Second Floor of FCI Building at Uduma, Kasargod	57
74	Consturction of First and Second floor for the FCI building at Kannur	145
75	Infrastructure Development & Capacity building in Tourism for KITTS	350
76	Setting up of State Institute of Hotel Management, Catering Technology & Applied Nutrition at Kozhikode	250
77	Construction of Commercial building (Snack bar & Restaurant) at Kalamassery FCI compound	115
79	Clean Destination Campaign	263
80	Setting up of Biogas plant at Alappuzha	29.9
82	Balance work for the construction of Academic block for the State Institute of Hotel management, Catering Technology & Applied Nutrition at Kozhikode	315
83	Development of Kappil Beach and Boat Club as a Tourist Destination	86.3
84	Development of Palaikari Fish Farm and Surrounding Areas in Chempu village into a Major Destination	22.96
85	Renovation of Guest House Old Block, Kozhikode (Phase 1)	70
86	Renovation of Housekeeping room, Pantry and Toilets at Guest House, Thycaud, Thiruvananthapuram	22
87	Urgent Repairs - Preventing leakage in the old Palace Building at Guest House, Aluva	26.5
89	Reconstruction of Pazhassi Gardens at Pazhassi Dam Area in Kannur	147
90	Providing a tourism amenity centre, Walkway, Pavilion and boat jetty at Kannetty Kayal, Kollam	100
91	2nd Phase development of Ottumbram beach, Thanur, Malappuram	139.5
92	DTPC Ernakulam - Boat Cruise Terminal 2013	15
93	Purchase of boat and Engines for boat clubs at DTPC Trivandrum	158

94	Renovation of District Tourism Information centre at Malappuram	19
95	Furnishing of Ranipuram Tourist Resort	20.89
96	Development of Iringole Mana and surroundings at Perumbavoor	98
97	Development of Tourism facilitation centre cum watch tower at Kuttikanam, Idukki	62
98	Development of Kodoor River side Walkway at Kottayam	142
99	Revamping DTPC Information office as a State of the Art visitor centre-revised A.S	35
100	Toilet facilites for St: Andrew's Forane Church, Arthunkal, Alappuzha	22.505
101	Neralath Valluvanadan Heritage Museum at Valambur, Angadippuram	25
102	Changanassery- Chethipuzha Kadavu Beautification	51.93
103	Childrens park at Changorathu Grama Panchayat in Kozhikkode District	25
104	Protection of Heritage Properties - Renovation of Pandallur in Malappuram District	159.5
106	Product / Infrastructure Development at Thenmala	109
107	Extension of Ecotourism at Kochupampa in Gavi Division	67
108	Malabar mangrove Ecotourism Circuit at Vellikkal near Valapattanam, Kannur	54
109	International Mountain Cycling competetion at Thenmala (MTB Kerala 2013)	50
111	Upgradation of Nandanam, guruvayur	150
112	Upgradation of Periyar House, Thekkady	150
113	Upgradation of Chaitram, Thiruvananthapuram	200
114	Upgradation of Aranya Nivas, Thekkady	150
116	Partership meets July-September 2013	292.3607
117	Participation in Domestic Trade fairs 2013-14	208
118	Purchase of semi academic book on Spice Route	9

119	Participation in International Tourism fairs 2013-14	401.63
120	Workshops in 14 International cities during 2013-14	485.957
121	Financial Assistance for International Conference on Travel Technology (ICTT India)	20
123	Festival Calendar for Monsoon season with data from 14 districts	22.472
124	Shifting www.keralatourism.org to Amazon cloud during online video quiz	12
125	Social media optimization- making a presence in Instagram & pinterest	22.472
126	Web based campaign with image recognising technology for android mobiles	22.472
127	Partnership meet Tier 1	22.4495
128	Web Maintenance 2013-14	56.18
129	PR Activities for Kerala Tourism- paint Kerala and Keala Calling	53.4
131	Monitoring of Projects of Department of Tourism by strengthening the District offices & Directorate of Tourism	93.8
133	Full scale implementation of Tourism Clubs in Kerala 2013-14	66.2
134	Awareness campaign for Responsible Tourism	220
136	Maintenance of the Special Implementation Team, Muzris Heritage a project	27.73
137	CDP for mathilakam and S N Puram Panchayath and extended areas of Edavilangu Poyya and Puthenvelikkara Panchayaths	23
138	Conservation of Jewish Cemetery site at Chennamangalam	86
139	Developing water based transport infrastructure at Muzris Heritage site	256.11
140	Development of Infrastructure facilities at Muzris Heritage Project	209
141	Development of Access Road to Kottappuram Fort, Kodungalloor	98
142	Construction of Over head water tank & Setting up of mobile Food counters at Waterfront area of Kottappuram market, Kodungallur	68
144	Development of Aruvikara and its surroundings	56.06811
146	Study on "Problems and Prospects of Micro Destinations in Kerala"	50

147	Tourist arrival statistics data collection in Kerala for 2013-14	30
149	Adithalam- The Responsible Tribal Fest	27
151	Content translation of web site and live web casting events	77.53
152	PR campaign for Kerala Tourism through online contests	89.9
153	Developing a mobile based application to explore an intelligent map of Kerala embeded with destination videos	28.66
154	Production of a film for display in National Partnership meet 2014	36.00
155	Renovation of the building for Guest House Kollam	25
156	Green Tourism Circuit Project- Kottayam G.O (Rt) No.	4585
157	Development of backwaters circuit in Alappuzha in backwater region as a mega circuit in kerala G.O (Rt) No. 5749/2013/TSM dt. 12.7.13)	462.63
158	Development of Bhoothathankettu as a tourist destination in Kerala	235.4
159	Development of Kochi as a Tourist Destination in Kerala	324.39
160	Nishagandhi Festival 2014	94
161	Utsavam 2013-14	125
162	Onam Celebration 2013	246

Chart 12.1.1

State Government budget for Tourism

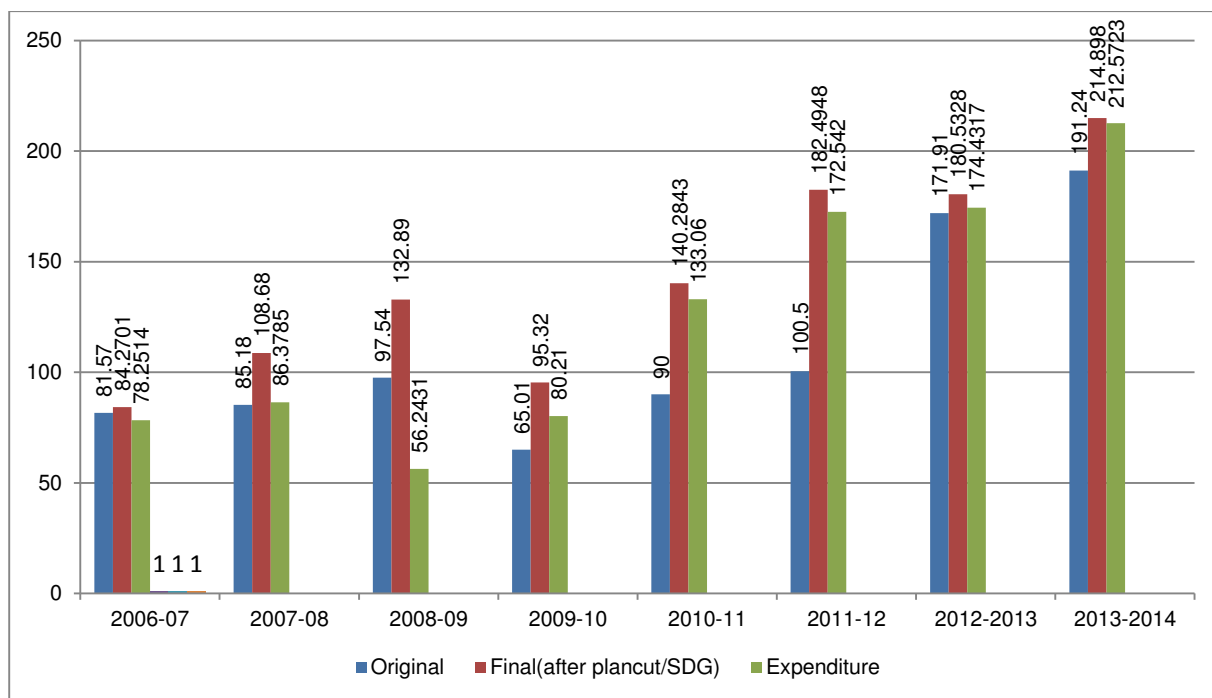
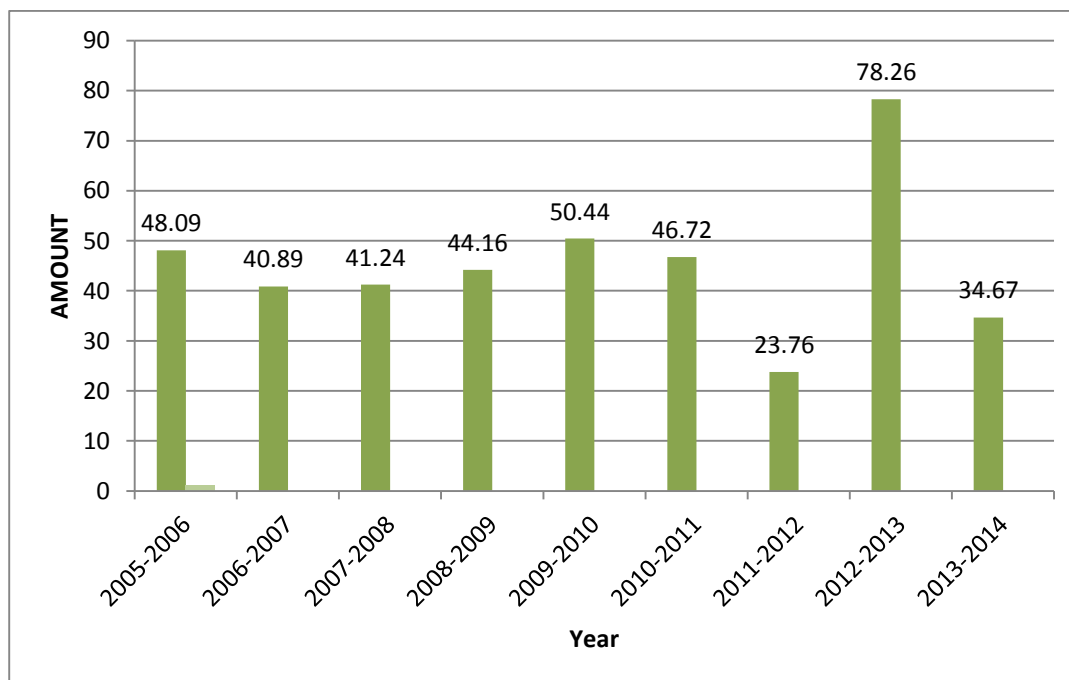


Chart 12.1.2

Central Assistance



APPENDIX-I

Definitions

1. DEFINITIONS FOLLOWED IN INDIA

ARRIVALS:

The data presented in this publication refer to the number of arrivals of tourists/ visitors and not to the number of persons. An individual who makes multiple trips to the country is counted each time as a new arrival. This is also true in the case of Indian nationals going abroad.

FOREIGN VISITOR:

A Foreign visitor is any person visiting the country on a foreign passport whose main purpose of visit is other than the exercise of an activity remunerated from within the country or establishment of residence in the country. This definition covers two segments of visitors: "Tourists" and "Same Day Visitors".

FOREIGN TOURIST:

A foreign tourist is a person visiting India on a foreign passport, staying at least twenty four hours in the country, the purpose of whose journey can be classified under one of the following headings:

- (i) Leisure (recreation, holiday, health, study, religion and sport);
- (ii) Business, family mission, meeting.

The following are not regarded as 'foreign tourists':

- (i) Persons arriving with or without a contract, to take up an occupation or engage in activities remunerated from within the country;
- (ii) Persons coming to establish residence in the country;
- (iii) "Same Day Visitors" i.e. temporary visitors staying less than twenty four hours in the country (including travelers on cruises).

EXCURSIONIST:

A visitor in accordance with the foregoing definition and staying less than 24 hours in the country is treated as "Same Day Visitor" or "Excursionist".

CRUISE PASSENGER:

A visitor, as defined above, who arrives in the country aboard a cruise ship and does not spend a night at an accommodation establishment in the country is treated as a cruise passenger.

Ports: Ports are the points of entry of foreign visitors into India. At present, there are seventy two ports. The list of this ports is given below.

Regions: The regional classification of countries, used for the presentation of data in the publication, is as follows:

- 1) Africa comprises the continent of Africa including, Egypt and the adjoining islands.
- 2) Australasia includes Australia, New Zealand, Fiji and the Pacific Island groups like French Polynesia, Papua New Guinea, New Caledonia etc.
- 3) East Asia comprises China, Hongkong, Japan, Korea, Macau, etc.
- 4) West Asia comprises countries in the Middle East including Turkey, Cyprus and Persian Gulf countries excluding Iran.
- 5) South Asia includes Iran, Afghanistan, Sri Lanka, Maldives and countries of the Indian sub continent.
- 6) South East Asia comprises countries of Indo-China including Myanmar & ASEAN countries.
- 7) North America includes Canada and the USA.
- 8) Central and South America comprises countries in the Central and South America, and the Caribbean Islands.
- 9) Eastern Europe comprises all the countries of former Soviet Union, Yugoslavia, Czechoslovakia, Hungary, Poland, etc.
- 10) Western Europe includes all the countries of Europe excluding East European countries, Turkey and Cyprus.

DOMESTIC TOURIST:

A domestic tourist is a person who travels within the country to a place other than his usual place of residence and stays 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 for any of the following purposes:-

- i) Pleasure (holiday, leisure, sports, etc.);
- ii) Pilgrimage , religious and social functions;
- iii) Business conferences and meetings; and
- iv) Study and health.

The following are not regarded as domestic tourists:

- (i) Persons arriving with or without a contract to take up an occupation or engage in activities remunerated from within the State/Centre.
- (ii) Persons coming to establish more or less permanent residence in the State/Centre.
- (iii) Persons visiting their hometowns or native places on leave or a short visit for meeting relations and friends, attending social and religious functions etc. and staying in their own homes or with relatives and friends and not using any sight -seeing facilities.
- (iv) Foreigners resident in India.

INDIAN NATIONALS GOING ABROAD:

Any person going abroad with an Indian passport is regarded as an Indian national going abroad irrespective of the purpose and the destination.

TRAVEL RECEIPTS/FOREIGN EXCHANGE EARNINGS FROM TOURISM:

These are receipts of the country as a result of consumption expenditure, i.e. payments made for goods and services acquired, by foreign visitors in the economy out of foreign currency brought by them.

ACCOMMODATION ESTABLISHMENTS:

Places in which rooms are provided to tourists for stay, and classified as hotels, tourist bungalows, travelers' lodges, youth hostels, etc.

APPROVED HOTELS:

Hotels which conform to certain laid down standards on physical features, standards of facilities and other services are approved by the Tourism Departments of Central and State Governments and are known as approved hotels. These are graded variously as five star deluxe, five star, four star, etc.

OCCUPANCY RATE:

The occupancy rate refers to the ratio between available capacity (in terms of rooms or beds) and the extent to which it is used. Occupancy is worked out on the basis of number of rooms occupied by both domestic and international tourists.

2. INTERNATIONAL DEFINITIONS

Tourism: The activities of persons traveling to and in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.

Domestic Tourism: Residents of a given country traveling only within that country.

Inbound Tourism: In relation to a given country non-residents traveling to that country.

Outbound Tourism: In relation to a given country, residents travelling another country.

Internal Tourism: Domestic and Inbound Tourism.

National Tourism: Domestic and Out bound Tourism.

International Tourism: Inbound and Outbound Tourism.

Visitors: All type of travelers engaged in tourism are described as Visitors, and as such the term represents the basic concept for the whole system of tourism statistics.

International Visitors : Any person who travels to a country other than that in which is his/her usual residence, but outside his/her usual environment, for a period not exceeding 12 months and whose main purpose of visit is other than the exercise of an activity remunerated from within the country visited.

INTERNATIONAL VISITORS INCLUDE:

_ **Tourists (overnight visitors):** Visitors who stay at least one night in a collective of private accommodation in the country visited.

_ **Same Day Visitors:** Visitors who do not spend a night in a collective or private accommodation in the country visited. This definition includes passengers of cruise ships who return to the ship every night to sleep on board even though the ship remains in port for several days. Also included in this group are, by extension, owners or passengers of Yachts, and passengers on a group tour accommodated in a train.

Domestic Visitors: Any person residing in a country who travels to a place within the country, outside his/her usual environment for a period not exceeding 12 months, and whose main purpose of visit is other than the exercise of an activity remunerated from within the place visited.

DOMESTIC VISITORS INCLUDE:

_ Tourists (overnight visitors): Visitors who stay at least one night in a collective or private accommodation in the place visited.

_ Some Day Visitors: Visitors who do not spend one night in a collective or private accommodation in the place visited.