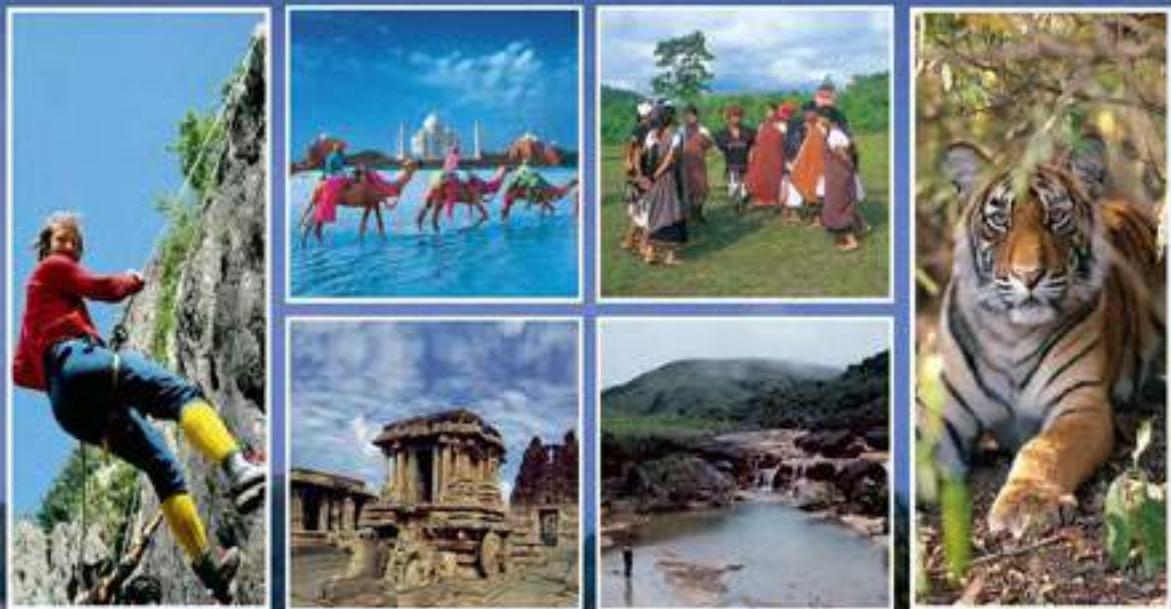


INDIA TOURISM STATISTICS भारतीय पर्यटक आंकड़े 2013



Atithidevo Bhava
Incredible India

Ministry of Tourism
Government of India
Market Research Division

INDIA TOURISM STATISTICS 2013



**Government of India
Ministry of Tourism
Market Research Division**



एक कदम स्वच्छता की ओर

स्वच्छ भारत
स्वच्छ पर्यटन





डॉ. ललित के. पांवर

सचिव

Dr. Lalit K. Panwar
Secretary

FOREWORD

भारत सरकार
पर्यटन मंत्रालय
परिवहन भवन, संसद मार्ग
नई दिल्ली - 110001
Government of India
Ministry of Tourism
Transport Bhawan, Parliament Street
New Delhi - 110001

Tel.: 91-11-23717792, 23321395
Fax: 91-11-23717890
E-mail: sectour@nic.in

The importance of timely availability of the latest and reliable tourism statistics for preparation of programmes and policies relating to the development of tourism in the country is universally accepted and requires no fresh emphasis.

I have great pleasure in releasing "India Tourism Statistics 2013". The Ministry of Tourism has been presenting tourism related data on a regular basis and this is the 56th in the series of such publications.

The present publication contains data on Foreign Tourist Arrivals (FTAs), Foreign Exchange Earnings (FEEs) from tourism, domestic tourism, hotels, Medical tourism, travel trade and training institutions in the field of travel and tourism besides sharing relevant details regarding the evaluation of International Campaigns under the Chapter on Surveys & Studies.

The Appendix to this publication includes relevant guidelines of various schemes of the Ministry of Tourism for wider dissemination of the same. Guidelines for wellness tourism and Golf Tourism have also been included in the publication.

During the year 2013, FTAs in India registered a positive growth of 5.9% over 2012. This growth rate is better than UNWTO's estimated growth rate of 4% for the world as a whole in 2013. Further, with a share of 1.54% in the world's tourism receipts (in US \$), India occupies 16th rank globally. Within Asia & the Pacific Region, India stands at 8th position in respect of tourism receipts.

I am sure that the comprehensive information contained in this publication will be useful for all concerned with the travel and tourism industry, including policy makers, administrators and researchers. Suggestions for improvement in the content and coverage of the publication are, however, always welcomed.

Based on the information available from the Bureau of Immigration (BOI), States/Union Territories, Archaeological Survey of India, UNWTO, etc., this publication has been prepared by the officers of the Market Research Division of Ministry of Tourism. The entire team of Market Research Division under the able guidance of Dr. Ravi Kant Bhatnagar, ADG deserves compliments and appreciation for their hard work and dedication.

3MS

(Dr. Lalit K. Panwar)



**OFFICERS OF MARKET RESEARCH DIVISION
ASSOCIATED WITH THE PREPARATION OF
INDIA TOURISM STATISTICS 2013**

Dr. Ravi Kant Bhatnagar

Additional Director General

Smt. Mini Prasannakumar

Joint Director

Smt. Neha Srivastava

Deputy Director

Shri Shailesh Kumar

Deputy Director

Smt. V. Meera

Assistant Director

Ms. Anila Kumari T

Assistant Director

Shri R.L. Meena

Assistant Director

Shri S.K. Mohanta

DPA Grade "B"

Shri Rajender Prasad

DPA Grade "B"

Shri Banke Ram

DPA Grade "B"

Smt. Charu Arora

DEO Grade "B"



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1

Chapter

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IMPORTANT STATISTICS ON TOURISM



IMPORTANT STATISTICS ON TOURISM, 2013

(I) INDIA

1.	Number of Foreign Tourist Arrivals in India (million)	6.97
	Annual Growth Rate	5.9%
2.	Foreign Tourist Arrivals by Mode of Transport (Percentage)	
	i) Air	91.0%
	ii) Land	8.5%
	iii) Sea	0.5%
3.	Foreign Tourist Arrivals by Port of Entry (Numbers in million and Percentage share)	
	i) Delhi (Airport)	2.30 (33.0%)
	ii) Mumbai (Airport)	1.38(19.8%)
	iii) Chennai (Airport)	0.68 (9.8%)
	iv) Bengaluru (Airport)	0.45(6.5%)
	v) Kolkata (Airport)	0.25(3.6%)
	vi) Others	1.91(27.3%)
	vii) All Ports	6.97 (100.0%)
4.	Foreign Tourist Arrivals From Top 15 Markets (Numbers in million and Percentage share)	
	i) U.S.A.	1.085(15.58%)
	ii) UK	0.809(11.62%)
	iii) Bangladesh	0.525(7.53%)
	iv) Sri Lanka	0.262 (3.77%)
	v) Russian Federation	0.259 (3.72%)
	vi) Canada	0.255(3.66%)
	vii) Germany	0.252(3.62%)
	viii) France	0.248(3.56%)
	ix) Malaysia	0.243(3.48%)
	x) Japan	0.220 (3.16%)
	xi) Australia	0.219(3.14%)
	xii) China (Main)	0.175(2.51%)
	xiii) Singapore	0.143(2.05%)
	xiv) Thailand	0.117(1.68%)
	xv) Nepal	0.114(1.63%)
	xvi) Share of top 10 countries	4.160(59.70%)
	xvii) Share of top 15 countries	4.927(70.72%)

5.	Foreign Exchange Earnings from Tourism #	
i)	In INR terms (1 crore = 10 million)	₹107671 Crore
	Annual Growth Rate	14.0%
ii)	In US\$ terms (billion)	US \$ 18.45 (#)
	Annual Growth Rate	4.0%
6.	No. of Indian Nationals Departures from India (million)	16.63
	Annual Growth Rate	11.4%
7.	Number of Domestic Tourist Visits (million)	1145.28
	Annual Growth Rate	9.6%
8.	Approved Hotels as on 31st December 2013 (P)	
i)	Number of Hotels	1257
ii)	Number of Rooms	75353
9.	Travel Trade as on 31st December 2013	
i)	Number of Approved Inbound Tour Operators	168
ii)	Number of Approved Travel Agencies	107
iii)	Number of Approved Tourist Transport Operators	54
iv)	Number of Approved Domestic Tour Operators	14
v)	Number of Approved Adventure Tour Operators	06

(II) WORLD

1.	Number of International Tourist Arrivals (million)	1087 (P)
	Annual Growth Rate	4.8%
2.	International Tourism Receipts (US\$ billion)	US\$ 1195(P)
	Annual Growth Rate	7.2%

(III) ASIA PACIFIC REGION

1.	Number of International Tourist Arrivals (million)	248.7 (P)
	Annual Growth Rate	6.5%
2.	International Tourism Receipts (US\$ billion)	US \$ 359.2(P)
	Annual Growth Rate	9.2%

(IV) INDIA's POSITION IN WORLD

1.	Share of India in International Tourist Arrivals	0.64%
2.	India's rank in World Tourist Arrivals	42
3.	Share of India in International Tourism Receipts	1.54%
4.	India's rank in World Tourism Receipts (As per RBI's estimate)	16

(V) INDIA's POSITION IN ASIA PACIFIC REGION

1.	Share of India in Tourist Arrivals	2.81%
2.	India's rank in Tourist Arrivals	12
3.	Share of India in Tourism Receipts	US\$ 5.14%
4.	India's rank in Tourism Receipts (As per RBI's estimate)	8

(P) Provisional

Advance estimates

(VI) IMPORTANT HIGHLIGHT OF INDIAN TOURISM

- The number of Foreign Tourist Arrivals (FTAs) in India during 2013 increased to 6.97 million as compared to 6.58 million in 2012. The growth rate in FTAs during 2013 over 2012 was 5.9% as compared to 4.3% during 2012 over 2011. The growth rate of 5.9% in 2013 for India was better than growth rate of 5% for the International Tourist Arrivals in 2013.
- The share of India in international tourist arrivals in 2013 was 0.64%, India's rank in international tourist arrivals declined to 42nd, in 2013, from 41st in 2012. India accounted for 2.81% of tourist arrivals in Asia Pacific Region in 2013, with the rank of 12.
- About 91.0% of the FTAs entered India through air routes followed by 8.5% by land routes and 0.5% by sea routes. Delhi and Mumbai airports accounted for about 52.8% of the total FTAs in India. The top 15 source markets for FTAs in India in 2013 were USA, UK, Bangladesh, Sri Lanka, Russian Fed., Canada, Germany, France, Malaysia, Japan, Australia, China (Main), Singapore, Thailand and Nepal. These 15 countries accounted for about 70.72% of total FTAs in India in 2013.
- Tourism continues to play an important role as a foreign exchange earner for the country. In 2013, foreign exchange earnings (FEE) from tourism were US\$ 18.45 billion as compared to US\$ 17.74 billion in 2012, registering a growth of 4.0%.
- Number of domestic tourist visits in India during 2013 was 1145.28 (P) million as compared to 1045.05 million in 2012, with a growth rate of 9.6 %.
- Number of Indian national departures from India during 2013 was 16.63 million as compared to 14.92 million in 2012, registering a growth rate of 11.4%.



2

Chapter

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**INBOUND TOURISM- FOREIGN TOURIST
ARRIVALS IN INDIA**



INBOUND TOURISM- FOREIGN TOURIST ARRIVALS IN INDIA

2.1 FOREIGN TOURIST ARRIVALS IN INDIA

Data regarding the number of Foreign Tourist Arrivals (FTAs) and related aspects have been compiled and are presented in the present chapter. The FTAs in India continued to grow from 1.28 million in 1981 to 1.68 million in 1991, 2.54 million in 2001, to reach 6.97 million in 2013. During the year 2013, FTAs in India registered a positive growth of 5.9% over 2012. The compound annual growth rate (CAGR) in FTAs in India during 2001 to 2013 was 8.8%. Table 2.1.1 gives the number of FTAs in India for the years 1981 to 2013 along with the corresponding growth rate over previous year.

**TABLE 2.1.1
FOREIGN TOURIST ARRIVALS (FTAs) IN INDIA, 1981-2013**

Year	FTAs in India	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

Year	FTAs in India	Annual Growth (%)
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

Source: Bureau of Immigration, India

The growth in FTAs in India during the eighties & nineties did not follow any consistent pattern. While the years, viz. 1986, 1992, 1995, 2003 to 2007 and 2010 saw double-digit positive growth, there was negative growth in the years 1984, 1990, 1991, 1993, 1998, 2001, 2002 and 2009.

The country-wise details of FTAs in India during 2011 to 2013 are given in Table 2.1.2. The FTAs from USA during 2011, 2012 and 2013 were the highest with the percentage share of 15.54%, 15.81% and 15.58%, respectively. The growth rate in FTAs in India in 2013 as compared to 2012 was maximum for Pakistan (86.8%) followed by Russian Fed. (46.0%), Egypt (42.5%), Yemen (34.1%) and Saudi Arabia (33.5%). FTAs from Kazakhstan, Oman, Malaysia and Philippines also recorded a growth of more than 20% in 2013 as compared to 2012. Some of the countries for which significant decline in FTAs were observed during the same period include Iran (25.5%), followed by Sri Lanka (11.7%), Belgium (10.6%), Maldives (10.2%), Nepal (9.2%), Czech republic (9.1%), Norway (8.9%) , Sudan (8.8%), Spain (7.4%), Netherlands (7.0%), Nigeria (6.1%), Poland (5.0%) and Sweden (4.4%).

The top 10 countries for FTAs in India during 2013 are USA, UK, Bangladesh, Sri Lanka, Russian Fed., Canada, Germany, France, Malaysia and Japan.

TABLE 2.1.2
NATIONALITY-WISE FOREIGN TOURIST ARRIVALS IN INDIA, 2011-2013

Country of Nationality	Number of Arrivals			% Share			% Change	
	2011	2012	2013	2011	2012	2013	2012/11	2013/12
North America								
Canada	259017	256021	255222	4.11	3.89	3.66	4.2	-0.3
U.S.A	980688	1039947	1085309	15.54	15.81	15.58	6.0	4.4
Total	1239705	1295968	1340531	19.65	19.70	19.24	4.5	3.4
Central and South America								
Argentina	9391	9831	10325	0.15	0.15	0.15	4.7	5.0
Brazil	17268	18440	18551	0.27	0.28	0.27	6.8	0.6
Mexico	10876	11254	13074	0.17	0.17	0.19	3.5	16.2
Others	23453	24174	26486	0.37	0.37	0.38	3.1	9.6
Total	60988	63699	68436	0.97	0.97	0.98	4.4	7.4
Western Europe								
Austria	36483	38585	36465	0.58	0.59	0.52	5.8	-5.5
Belgium	40478	42604	38091	0.64	0.65	0.55	5.3	-10.6
Denmark	34683	33084	30842	0.55	0.50	0.44	-4.6	-6.8
Finland	23730	22416	21212	0.38	0.34	0.30	-5.5	-5.4
France	231423	240674	248379	3.67	3.66	3.56	4.0	3.2
Germany	240235	254783	252003	3.81	3.87	3.62	6.1	-1.1
Greece	7253	7493	7983	0.11	0.11	0.11	3.3	6.5
Ireland	22089	24546	27174	0.35	0.37	0.39	11.1	10.7
Italy	100889	98743	93951	1.6	1.50	1.35	-2.1	-4.9
Netherlands	75153	74800	69547	1.19	1.14	1.00	-0.5	7.0
Norway	24578	23569	21462	0.39	0.36	0.31	-4.1	-8.9
Portugal	24061	24670	29612	0.38	0.38	0.42	2.5	20.0
Spain	71405	67044	62079	1.13	1.02	0.89	-6.1	-7.4
Sweden	48690	51058	48826	0.77	0.78	0.70	4.9	-4.4
Switzerland	46332	48388	48821	0.73	0.74	0.70	4.4	0.9
U.K.	798249	788170	809444	12.65	11.98	11.62	-1.3	2.7
Others	12964	12439	9975	0.21	0.19	0.14	-4.0	-19.8
Total	1838695	1853066	1855866	29.14	28.17	26.64	0.8	0.2
Eastern Europe								
Czech Rep.	11256	11129	10121	0.18	0.17	0.15	-1.1	-9.1
Kazakhstan	9810	11653	14680	0.16	0.18	0.21	18.8	26.0
Poland	28499	25030	23785	0.45	0.38	0.34	-12.2	-5.0
Russian Fed.	144312	177526	259120	2.29	2.70	3.72	23.0	46.0
Ukraine	23467	29033	31826	0.37	0.44	0.46	23.7	9.6

Country of Nationality	Number of Arrivals			% Share			% Change	
	2011	2012	2013	2011	2012	2013	2012/11	2013/12
Others	57254	58315	65551	0.80	0.79	0.85	2.9	13.8
Total	274598	312686	405083	4.35	4.75	5.81	13.9	29.5
Africa								
Egypt	8791	10571	15062	0.14	0.16	0.22	20.2	42.5
Kenya	30045	34037	40484	0.48	0.52	0.58	13.3	18.9
Mauritius	22091	25013	27418	0.35	0.38	0.39	13.2	9.6
Nigeria	33537	36762	34522	0.53	0.56	0.50	9.6	-6.1
South Africa	58430	50161	58023	0.93	0.76	0.83	-14.2	15.7
Sudan	8414	9626	8778	0.13	0.15	0.13	14.4	-8.8
Tanzania	19470	21862	23345	0.31	0.33	0.34	12.3	6.8
Others	51608	73396	67639	0.82	1.12	0.97	42.2	-7.8
Total	232386	261428	275271	3.68	3.97	3.95	12.5	5.3
West Asia								
Bahrain	9587	10045	10531	0.15	0.15	0.15	4.8	4.8
Iraq	30808	38826	41218	0.49	0.59	0.59	26.0	6.2
Israel	48089	47649	48737	0.76	0.72	0.70	-0.9	2.3
Oman	40577	49759	62252	0.64	0.76	0.89	22.6	25.1
Saudi Arabia	26268	32127	42892	0.42	0.49	0.62	22.3	33.5
Turkey	17359	22986	25022	0.28	0.35	0.36	32.4	8.9
U.A.E.	66383	41664	51513	1.05	0.63	0.74	-37.2	23.6
Yemen Arab Rep	14955	18654	25019	0.24	0.28	0.36	24.7	34.1
Others	24747	29286	35929	0.39	0.45	0.52	18.3	22.7
Total	278773	290996	343113	4.42	4.42	4.92	4.4	17.9
South Asia								
Afghanistan	89605	95231	111370	1.42	1.45	1.60	6.3	16.9
Iran	43399	40973	30527	0.69	0.62	0.44	-5.6	-25.5
Maldives	53999	50428	45270	0.86	0.77	0.65	-6.6	-10.2
Nepal	119131	125375	113790	1.89	1.91	1.63	5.2	-9.2
Pakistan	48640	59846	111794	0.77	0.91	1.60	23.0	86.8
Bangladesh	463543	487397	524923	7.35	7.41	7.53	5.1	7.7
Sri Lanka	305853	296983	262345	4.85	4.51	3.77	-2.9	-11.7
Bhutan	15489	15266	15016	0.25	0.23	0.22	-1.4	-1.6
Total	1139659	1171499	1215035	18.06	17.81	17.44	2.8	3.7
South East Asia								
Indonesia	32530	29559	33747	0.52	0.45	0.48	-9.1	14.2
Malaysia	208196	195853	242649	3.3	2.98	3.48	-5.9	23.9
Myanmar	25043	30588	34916	0.40	0.47	0.5	22.1	14.1

Country of Nationality	Number of Arrivals			% Share			% Change	
	2011	2012	2013	2011	2012	2013	2012/11	2013/12
Philippines	31151	33323	42224	0.49	0.51	0.61	7.0	26.7
Singapore	119022	131452	143025	1.89	2.00	2.05	10.4	8.8
Thailand	92404	105141	117136	1.46	1.60	1.68	13.8	11.4
Vietnam	9809	11332	12312	0.16	0.17	0.18	15.5	8.6
Others	3600	3666	4045	0.06	0.06	0.06	1.8	10.3
Total	521755	540914	630054	8.27	8.22	9.04	3.7	16.5
East Asia								
China(Main)	142218	168952	174712	2.25	2.57	2.51	18.8	3.4
China(Taiwan)	25916	31639	35491	0.41	0.48	0.51	22.1	12.2
Japan	193525	220015	220283	3.07	3.34	3.16	13.7	0.1
Rep.of Korea	108680	109469	112619	1.72	1.66	1.62	0.7	2.9
Others	5612	5547	4200	0.09	0.08	0.06	-1.2	-24.3
Total	475951	535622	547305	7.54	8.14	7.85	12.5	2.2
Australasia								
Australia	192592	202105	218967	3.05	3.07	3.14	4.9	8.3
New Zealand	36839	38917	40801	0.58	0.59	0.59	5.6	4.8
Others	3734	3489	3806	0.06	0.05	0.05	-6.6	9.1
Total	233165	244511	263574	3.70	3.72	3.78	4.9	7.8
Not Classified elsewhere	13547	7356	23333	0.22	0.13	0.35	-45.7	217.2
Grand Total	6309222	6577745	6967601	100	100	100	4.3	5.9

Source: Bureau of Immigration, India

2.2 FOREIGN TOURIST ARRIVALS IN INDIA FROM DIFFERENT REGIONS

FTAs in India from different regions of the World during last three years are given in Table 2.2.1. It can be observed clearly that the FTAs in India have been increasing from all regions during the year 2013. The growth was maximum from Eastern Europe (29.5%) followed by West Asia (17.9%), South East Asia (16.5%), Australasia (7.8%), Central & South America (7.4%), Africa (5.3%), South Asia (3.7%), North America (3.4%), East Asia (2.2%) and Western Europe (0.2%).

The percentage share in FTAs in India during 2013 was the highest for Western Europe (26.64%) followed by North America (19.24%), South Asia (17.44%), South East Asia (9.04%), East Asia (7.85%), Eastern Europe (5.81%), West Asia (4.92%), Africa (3.95%), Australasia (3.78%) and Central & South America (0.98%). The arrivals in India from Western Europe were also the highest during the years 2012 and 2011.

The graph below gives the trends in FTAs in India during the last three years from all the regions.

Foreign Tourist Arrivals in India from different Regions, 2013

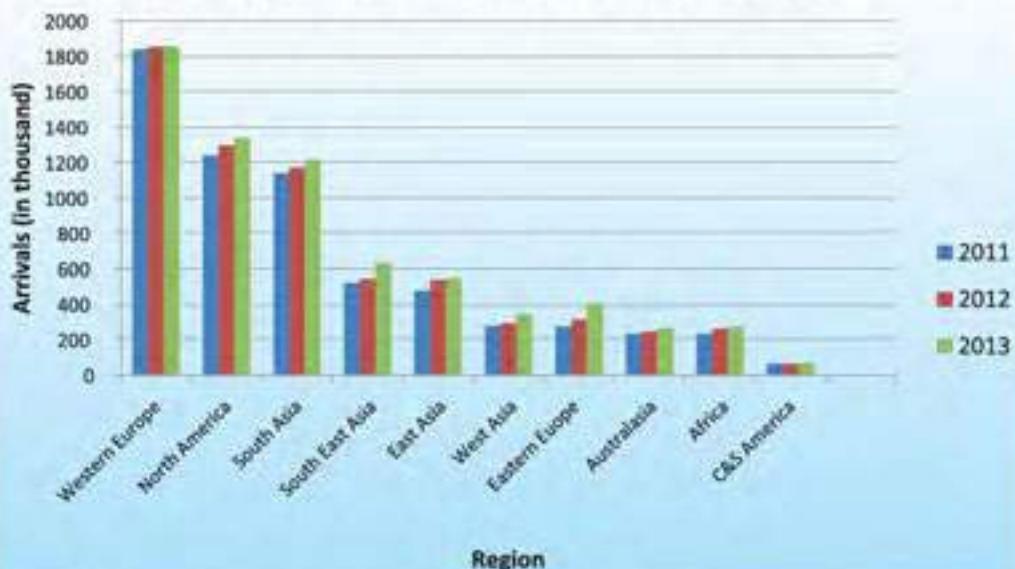


TABLE 2.2.1

FTAs IN INDIA FROM DIFFERENT REGIONS OF THE WORLD, 2011-2013

Region/ Country	No. of Arrivals			Proportion to the Total			Percentage change	
	2011	2012	2013	2011	2012	2013	2012/11	2013/12
Western Europe	1838695	1853066	1855866	29.14	28.17	26.64	0.8	0.2
North America	1239705	1295968	1340531	19.65	19.70	19.24	4.5	3.4
South Asia	1139659	1171499	1215035	18.06	17.81	17.44	2.8	3.7
South East Asia	521755	540914	630054	8.27	8.22	9.04	3.7	16.5
East Asia	475951	535622	547305	7.54	8.14	7.85	12.5	2.2
West Asia	278773	290996	343113	4.42	4.42	4.92	4.4	17.9
Eastern Europe	274598	312686	405083	4.35	4.75	5.81	13.9	29.5
Australasia	233165	244511	263574	3.70	3.72	3.78	4.9	7.8
Africa	232386	261428	275271	3.68	3.97	3.95	12.5	5.3
C & S America	60988	63699	68436	0.97	0.97	0.98	4.4	7.4
Not Classified elsewhere	13547	7356	23333	0.21	0.11	0.33	-45.7	217.2
Total FTAs in India	6309222	6577745	6967601	100.00	100.00	100.00	4.3	5.9

Source: -Bureau of Immigration, India

2.3 SEASONALITY IN FOREIGN TOURIST ARRIVALS IN INDIA

Weather conditions at different tourist destinations are one of the important determinants of tourist arrivals. In the past, seasonal variations have been observed in FTAs to India.

Table 2.3.1 gives the month-wise FTAs in India during 2013 as well as comparative figures for 2012 and 2011. During the year 2013, December has been the peak month for FTAs in India followed by November, January, February, March and October. May, June, April, September, August and July have been the leanest month. The shares of August, September, October, May and December in FTAs during 2013 have increased as compared to 2012.

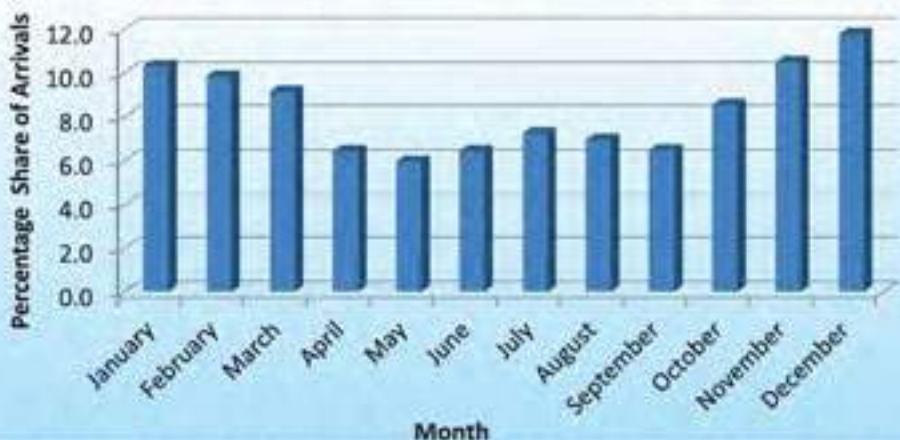
**TABLE 2.3.1
MONTH-WISE NUMBER & PERCENTAGE SHARE OF FTAs
IN INDIA DURING, 2011-2013**

Month	Foreign Tourist Arrivals (Numbers)			Growth rate in FTAs		Percentage Share		
	2011	2012	2013	2012/11	2013/12	2011	2012	2013
January	622713	681002	720321	9.4	5.8	9.9	10.4	10.3
February	627719	681193	688569	8.5	1.1	9.9	10.4	9.9
March	535613	606456	639530	13.2	5.5	8.5	9.2	9.2
April	446511	447581	450580	0.2	0.7	7.1	6.8	6.5
May	383439	374476	417453	-2.3	11.5	6.1	5.7	6.0
June	405464	433390	451223	6.9	4.1	6.4	6.6	6.5
July	475544	485808	506427	2.2	4.2	7.5	7.4	7.3
August	428490	445632	486338	4.0	9.1	6.8	6.8	7.0
September	417478	411562	453561	-1.4	10.2	6.6	6.3	6.5
October	559641	556488	598095	-0.6	7.5	8.9	8.5	8.6
November	669767	701185	733923	4.7	4.7	10.6	10.7	10.5
December	736843	752972	821581	2.2	9.1	11.7	11.4	11.8
Total	6309222	6577745	6967601	4.3	5.9	100	100	100

Source: Bureau of Immigration, India

The following graph clearly shows that the maximum FTAs in India were in October-December and January-March during 2013. This is generally consistent with the pattern in 2010 and 2011 also.

Month-wise Percentage Share of Foreign Tourist Arrivals in India, 2013



The peak and lean months for arrivals of tourists from top 15 source markets for India during 2013 are presented in Table 2.3.2. For 7 countries, namely USA, UK, Russian Federation, Canada, Australia, China (Main) and Singapore, December was the peak month. For Thailand, Malaysia and Japan, November was the peak month. Peak months for other countries were February (France), March (Germany), August (Sri Lanka) and October (Bangladesh and Nepal). Peak month for each of these countries accounted for more than 9% of the FTAs.

**TABLE 2.3.2
LEAN AND PEAK MONTHS OF FTAs IN INDIA FROM
TOP 15 COUNTRIES DURING, 2013**

S.No.	Nationality	Lean Month (% Share)	Peak Month (% Share)
1	United States	September (5.1%)	December (13.3%)
2	United Kingdom	June (4.3%)	December (12.0%)
3	Bangladesh	April (6.2%)	October (10.8%)
4	Sri Lanka	May (6.2%)	August (10.1%)
5	Russian Fed.	June (1.1%)	December (17.2%)
6	Canada	May (4.6%)	December (14.2%)
7	Germany	June (4.9%)	March (11.2%)
8	France	May (4.8%)	February (11.1%)
9	Malaysia	April (5.8%)	November (12.9%)
10	Japan	May (6.2%)	November (9.9%)

S.No.	Nationality	Lean Month (% Share)	Peak Month (% Share)
11	Australia	June (5.1%)	December (17.1%)
12	China(Main)	June (6.6%)	December (10.7%)
13	Singapore	April (6.4%)	December (13.2%)
14	Thailand	September (4.3%)	November (13.2%)
15	Nepal	June (6.2%)	October (11.7%)

Source: Bureau of Immigration, India

Table 2.3.3 depicts that the number of FTAs in India in 2013 was the highest (30.9%) during the winter season (October- December) and lowest (18.9%) during the summer season (April-June). The arrivals during the two quarters of January-March and October-December comprised (60.3%) of the total arrivals in 2013. The corresponding figure for 2012 was 60.4%.

TABLE 2.3.3

NATIONALITY-WISE AND QUARTER-WISE FTAs IN INDIA, 2013

Country of Nationality	Arrivals (in numbers)	Quarter-wise percentage share			
		1 st Quarter (Jan-Mar)	2 nd Quarter (Apr-June)	3 rd Quarter (July-Sep)	4 th Quarter (Oct-Dec)
North America					
Canada	255222	33.8	14.9	15.7	35.6
USA	1085309	25.7	22.7	20.5	31.1
Total	1340531	27.2	21.2	19.6	32.0
Central & South America					
Argentina	10325	38.4	17.8	15.1	28.7
Brazil	18551	34.9	17.8	18.0	29.3
Mexico	13074	26.3	20.7	23.0	30.0
Others	26486	29.4	21.7	21.4	27.5
Total	68436	31.6	19.9	19.8	28.7
Western Europe					
Austria	36465	33.7	16.1	20.7	29.5
Belgium	38091	30.6	16.6	22.3	30.5
Denmark	30842	44.6	14.1	15.2	26.1

Country of Nationality	Arrivals (in numbers)	Quarter-wise percentage share			
		1 st Quarter (Jan-Mar)	2 nd Quarter (Apr-June)	3 rd Quarter (July-Sep)	4 th Quarter (Oct-Dec)
Finland	21212	40.5	17.1	13.9	28.5
France	248379	32.5	18.2	22.2	27.1
Germany	252003	33.1	17.3	19.5	30.1
Greece	7983	28.3	19.0	21.8	31.9
Ireland	27174	28.5	20.7	21.4	29.4
Italy	93951	31.0	16.2	23.1	29.7
Netherlands	69547	29.2	18.4	22.7	29.7
Norway	21462	38.8	15.5	16.5	29.2
Portugal	29612	28.4	20.1	21.8	29.7
Spain	62079	23.9	15.7	33.9	26.5
Sweden	48826	38.7	13.5	12.4	35.4
Switzerland	48821	32.8	16.0	20.2	31.0
UK	809444	34.4	14.9	19.4	31.3
Others	9975	31.8	17.2	19.3	31.7
Total	1855866	33.3	16.2	20.4	30.1
Eastern Europe					
Czech Rep.	10121	32.4	17.9	19.4	30.3
Kazakhstan	14680	45.2	9.7	9.7	35.4
Poland	23785	35.0	15.2	17.4	32.4
Russian Fed.	259120	44.0	9.5	4.5	42.0
Ukraine	31826	41.9	15.2	10.2	32.7
Others	6551	35.2	16.8	17.2	30.8
Total	405083	41.4	11.9	8.3	38.4
Africa					
Egypt	15062	24.5	23.7	24.3	27.5
Kenya	40484	23.9	20.5	20.7	34.9
Mauritius	27418	26.6	20.1	23.8	29.5
Nigeria	34522	24.2	26.5	27.3	22.0
South Africa	58023	29.7	17.5	16.8	36.0
Sudan	8778	22.3	20.6	29.2	27.9
Tanzania	23345	24.5	23.0	23.8	28.7
Others	67639	27.1	21.3	25.3	26.3
Total	275271	26.2	21.4	22.9	29.5
West Asia					
Bahrain	10531	23.3	22.3	31.0	23.4
Iraq	41218	22.5	21.1	30.6	25.8
Israel	48737	29.1	17.8	28.4	24.7
Oman	62252	24.0	27.8	24.5	23.7

Country of Nationality	Arrivals (in numbers)	Quarter-wise percentage share			
		1 st Quarter (Jan-Mar)	2 nd Quarter (Apr-June)	3 rd Quarter (July-Sep)	4 th Quarter (Oct-Dec)
Saudi Arabia	42892	23.7	28.8	25.1	22.4
Turkey	25022	30.3	18.7	19.7	31.3
UAE	51513	16.4	24.8	34.9	23.9
Yemen	25019	22.4	23.1	27.1	27.4
Others	35929	25.5	20.4	23.4	30.7
Total	343113	23.9	23.4	27.4	25.3
South Asia					
Afghanistan	111370	35.9	20.7	20.0	23.4
Iran	30527	35.0	15.5	23.3	26.2
Maldives	45270	21.6	25.3	15.6	37.5
Nepal	113790	25.1	19.7	26.8	28.4
Pakistan	111794	22.8	23.7	21.6	31.9
Bangladesh	524923	22.5	21.5	24.6	31.4
Sri Lanka	262345	28.2	19.4	24.8	27.6
Bhutan	15016	27.0	23.5	25.0	24.5
Total	1215035	25.6	21.0	23.8	29.6
South East Asia					
Indonesia	33747	25.5	20.8	26.0	27.7
Malaysia	242649	24.7	19.2	24.4	31.7
Myanmar	34916	43.2	13.1	8.2	35.5
Philippines	42224	25.4	23.7	24.2	26.7
Singapore	143025	23.5	22.6	21.7	32.2
Thailand	117136	34.4	17.1	14.3	34.2
Vietnam	12312	29.0	16.4	17.7	36.9
Others	4045	30.2	14.0	19.2	36.6
Total	630054	27.5	19.5	20.9	32.1
East Asia					
China (Main)	174712	29.5	21.2	21.6	27.7
China (Taiwan)	35491	31.9	17.2	23.0	27.9
Japan	220283	29.1	19.6	24.4	26.9
Rep. of Korea	112619	32.7	18.6	23.6	25.1
Others	4200	23.5	18.2	21.4	36.9
Total	547305	23.5	18.2	21.4	36.9
Australasia					
Australia	218967	25.7	16.4	18.2	39.7
New Zealand	40801	24.7	16.4	18.4	40.5
Others	3806	28.7	19.4	21.2	30.7
Total	263574	25.6	16.4	18.3	39.7
Not Classified elsewhere	23333	28.3	19.9	19.7	32.1
Grand Total	6967601	29.4	18.9	20.8	30.9

Though more visitors come to India in the first and fourth quarters, there is regional variation in the arrivals from West Asia. In west Asia, second and third quarter together contributed about 50.8% in the total FTAs during the year.

2.4 MODE OF TRAVEL OF FOREIGN TOURIST ARRIVALS (FTAs) IN INDIA

Travel by 'air' has been found to be the most preferred mode of transport. In 2013, out of the 6.97 million foreign tourist arrivals in India, 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. Arrivals through land routes comprised tourists mainly from Bangladesh and Pakistan.

Mode of Travel of Foreign Tourist Arrivals in India, 2013



Table 2.4.1 shows the FTAs in India via air, land and sea routes during 1996-2013. Air travel has been the most preferred mode of travel for the FTAs over the years, accounting for above 80% share in each year during this period. During last four years from 2010 onwards, the percentage of FTAs travelling to India by air has remained more than 90%. The share of arrivals through land check-post has been above 10% during 2001 to 2008. Arrivals through sea routes remain less than 1% from 1996 to 2013. However, it was 1.0% in 2009.

TABLE 2.4.1
FTAs IN INDIA ACCORDING TO MODE OF TRAVEL, 1996-2013

Year	Arrivals	Percentage Distribution by Mode of Travel		
		Air	Sea	Land
1996	2287860	98.5	0.1	1.4
1997	2374094	98.5	0.0	1.5
1998	2358629	98.5	0.0	1.5
1999	2481928	98.4	0.0	1.6
2000	2649378	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

The table 2.4.2 gives the shares of FTAs in India through air, sea and land in 2013 for various regions and prominent individual countries. The mode of travel was predominantly air for all regions accounting for more than 95% of share in 2013. For South Asia, in particular for Bangladesh and Pakistan, arrivals have been predominantly through land, which were 82.9% and 88.3%, respectively. The countries from which significant arrivals were through the sea-route were Philippines (20.6%), Ukraine (6.3%), Indonesia (5.5%), Greece (4.9%), Myanmar (4.5%), Turkey (2.9%) and Egypt (1.6%).

TABLE 2.4.2
NATIONALITY-WISE FTAs IN INDIA DURING 2013 ACCORDING TO
MODE OF TRAVEL

Country of Nationality	Arrivals (in numbers)	Share in total arrivals from the country (%)		
		Air	Sea	Land
North America				
Canada	255222	99.4	0.1	0.5
USA	1085309	99.6	0.1	0.3
Total	1340531	99.6	0.1	0.3
Central & South America				
Argentina	10325	97.6	0.0	2.4
Brazil	18551	99.3	0.1	0.6
Mexico	13074	99.3	0.2	0.5
Others	26486	98.0	0.3	1.7
Total	68436	98.5	0.2	1.3
Western Europe				
Austria	36465	99.3	0.1	0.6
Belgium	38091	99.1	0.1	0.8
Denmark	30842	99.3	0.3	0.4
Finland	21212	99.3	0.1	0.6
France	248379	99.3	0.1	0.6
Germany	252003	98.9	0.5	0.6
Greece	7983	94.3	4.9	0.8
Ireland	27174	99.5	0.1	0.4
Italy	93951	99.3	0.1	0.6
Netherlands	69547	98.4	0.5	1.1
Norway	21462	98.9	0.4	0.7
Portugal	29612	99.7	0.0	0.3
Spain	62079	98.9	0.0	1.1
Sweden	48826	99.3	0.1	0.6
Switzerland	48821	99.0	0.2	0.8

Country of Nationality	Arrivals (in numbers)	Share in total arrivals from the country(%)		
		Air	Sea	Land
UK	809444	99.5	0.2	0.3
Others	9975	98.5	0.4	1.1
Total	1855866	99.3	0.2	0.5
Eastern Europe				
Czech Rep.	10121	97.0	0.0	3.0
Kazakhstan	14680	99.9	0.0	0.1
Poland	23785	96.4	1.1	2.5
Russian Fed.	259120	99.4	0.3	0.2
Ukraine	31826	93.4	6.3	0.3
Others	65551	96.7	1.4	1.8
Total	405083	98.4	1.0	0.6
Africa				
Egypt	15062	98.4	1.6	0.0
Kenya	40484	99.9	0.0	0.1
Mauritius	27418	99.8	0.0	0.2
Nigeria	34522	99.9	0.0	0.1
South Africa	58023	99.2	0.1	0.7
Sudan	8778	99.9	0.1	0.0
Tanzania	23345	99.6	0.2	0.2
Others	67639	99.5	0.3	0.2
Total	275271	99.5	0.2	0.3
West Asia				
Bahrain	10531	96.1	0.0	3.9
Iraq	41218	100.0	0.0	0.0
Israel	48737	98.2	0.0	1.8
Oman	62252	100.0	0.0	0.0
Saudi Arabia	42892	99.9	0.0	0.1
Turkey	25022	96.7	2.9	0.4
UAE	51513	100.0	0.0	0.0
Yemen	25019	99.7	0.0	0.3
Others	35929	96.4	3.6	0.0
Total	343113	99.1	0.4	0.5
South Asia				
Afghanistan	111370	100.0	0.0	0.0
Iran	30527	99.6	0.3	0.1
Maldives	45270	99.8	0.2	0.0

Country of Nationality	Arrivals (in numbers)	Share in total arrivals from the country(%)		
		Air	Sea	Land
Nepal	113790	95.9	0.0	4.1
Pakistan	111794	11.5	0.2	88.3
Bangladesh	524923	17.0	0.0	83.0
Sri Lanka	262345	98.7	0.3	1.0
Bhutan	15016	90.7	0.0	9.3
Total	1215035	100.0	0.0	0.0
South East Asia				
Indonesia	33747	93.4	5.5	1.1
Malaysia	242649	99.0	0.3	0.7
Myanmar	34916	83.5	4.5	12.0
Philippines	42224	79.3	20.6	0.1
Singapore	143025	99.6	0.1	0.3
Thailand	117136	92.3	1.1	6.6
Vietnam	12312	84.8	7.0	8.2
Others	4045	96.2	0.1	3.7
Total	630054	95.1	2.4	2.5
East Asia				
China (Main)	174712	97.6	1.3	1.1
China (Taiwan)	35491	96.6	0.0	3.4
Japan	220283	98.9	0.1	1.0
Rep. of Korea	112619	95.6	0.3	4.1
Others	4200	96.1	0.4	3.5
Total	547305	97.6	0.5	1.9
Australasia				
Australia	218967	99.2	0.1	0.7
New Zealand	40801	99.0	0.3	0.7
Others	3806	93.9	2.8	3.3
Total	263574	99.1	0.2	0.7
Not Classified elsewhere	23333	93.1	3.1	3.8
Grand Total	6967601	91.0	0.5	8.5

Source: Bureau of Immigration, India

2.5 PORT OF ENTRY OF FOREIGN TOURIST ARRIVALS IN INDIA

During 2013, the Delhi Airport had registered maximum number of FTAs in India i.e. 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, Bengaluru 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, Kolkata, and Bengaluru accounted for 72.7% of total FTAs in India in 2013, as compared to 75.4 % in 2012.

Table 2.5.1 gives the percentage of FTAs in India in 5 major airports during 1996-2013. Delhi airport remained on the top position in terms of FTAs followed by Mumbai airport.

TABLE 2.5.1
FTAs IN INDIA THROUGH MAJOR PORTS, 1996-2013

Year	Arrivals	Percentage Foreign Tourist Arrivals					
		Mumbai Airport	Kolkata Airport	Chennai Airport	Delhi Airport	Bengaluru Airport	Others
1996	2287860	29.3	2.9	11.3	35.1	-	21.4
1997	2374094	33.6	3.4	13.1	39.7	-	10.2
1998	2358629	33.4	3.4	12.7	39.9	-	10.6
1999	2481928	33.5	3.4	13.6	38.6	-	10.9
2000	2649378	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	31.8	-	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
2008	5282603	21.4	3.1	11.3	31.8	6.0	26.4
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	6.5	27.3

Source: Bureau of Immigration, India

The details of nationality-wise FTAs at major airports of India in 2013 are given in Table 2.5.2. During 2013, Mumbai was the major port of entry for the tourists from Africa and West Asia, which account for 47.8% and 37.2%, respectively of the total FTAs from these regions. Chennai was the major port of entry for the tourists from South East Asia accounting for more than 21.4% of the FTAs from these regions. For rest of the regions, Delhi was the major port of entry for FTAs. For South Asia, majority of arrivals were from land check posts, mainly from Pakistan and Bangladesh.

TABLE 2.5.2
NATIONALITY-WISE FTAs IN INDIA ACCORDING TO MAJOR PORT
OF DISEMBARKATION, 2013

Country of Nationality	Arrivals (in numbers)	Port-wise Distribution percentage						
		Mumbai Airport	Kolkata Airport	Chennai Airport	Delhi Airport	Bengaluru Airport	Hyderabad Airport	Others
North America								
Canada	255222	20.3	1.6	5.9	55.4	4.6	2.7	9.5
USA	1085309	25.7	1.9	8.3	31.4	10.4	8.5	13.8
Total	1340531	24.6	1.9	7.9	36.0	9.3	7.4	12.9
Central & South America								
Argentina	10325	21.4	3.3	3.6	58.4	4.4	0.7	8.2
Brazil	18551	23.5	2.7	6.4	50.4	9.5	1.9	5.6
Mexico	13074	16.0	1.8	6.6	60.3	5.9	1.9	7.5
Others	26486	21.7	4.0	4.0	53.6	5.9	2.1	8.7
Total	68436	21.1	3.1	5.1	54.7	6.7	1.8	7.5
Western Europe								
Austria	36465	14.6	2.3	4.7	54.9	5.7	1.0	16.8
Belgium	38091	34.5	1.2	7.2	44.8	5.0	1.3	6.0
Denmark	30842	18.3	1.7	10.4	35.6	9.0	1.4	23.6
Finland	21212	12.0	0.7	4.4	63.3	3.8	0.4	15.4
France	248379	16.5	1.3	20.4	45.9	9.2	0.8	5.9
Germany	252003	20.5	2.3	8.6	41.5	10.7	1.1	15.3
Greece	7983	22.9	3.6	5.6	37.7	6.8	3.8	19.6
Ireland	27174	20.8	4.2	7.1	30.5	10.3	4.5	22.6
Italy	93951	19.6	3.2	9.1	48.2	6.7	1.6	11.6
Netherlands	69547	24.1	1.9	5.7	50.6	9.0	1.9	6.8
Norway	21462	17.5	1.1	6.3	58.3	4.7	1.3	10.8
Portugal	29612	46.5	1.1	2.4	22.4	2.2	0.6	24.8
Spain	62079	20.3	2.5	5.5	56.7	5.9	1.3	7.8
Sweden	48826	20.1	1.7	5.1	39.8	10.3	1.3	21.7
Switzerland	48821	25.4	2.0	8.2	41.1	6.6	1.2	15.5
UK	809444	30.4	2.0	4.9	30.4	5.7	2.2	24.4
Others	9975	19.0	4.7	7.8	44.2	5.8	2.0	16.5
Total	1855866	24.9	2.0	8.0	38.6	7.2	1.7	17.6

Country of Nationality	Arrivals (in numbers)	Port-wise Distribution (%)						
		Mumbai Airport	Kolkata Airport	Chennai Airport	Delhi Airport	Bengaluru Airport	Hyderabad Airport	Others
Eastern Europe								
Czech Rep.	10121	22.2	3.1	6.8	50.3	5.6	1.0	11.0
Kazakhstan	14680	1.4	0.2	1.5	57.4	0.7	0.2	38.6
Poland	23785	21.2	3.2	4.8	49.0	6.1	1.2	14.5
Russian Fed.	259120	2.8	0.7	1.6	17.1	1.6	0.5	75.7
Ukraine	31826	9.2	3.1	3.1	24.4	2.7	0.8	56.7
Others	65551	15.9	2.0	4.1	56.3	4.8	1.2	15.7
Total	405083	6.3	1.3	2.4	28.0	2.4	0.6	59.0
Africa								
Egypt	15062	39.4	2.4	5.1	25.0	4.5	5.2	18.4
Kenya	40484	55.9	0.6	2.4	15.9	2.2	1.5	21.5
Mauritius	27418	50.6	0.5	7.5	31.3	8.6	0.4	1.1
Nigeria	34522	37.1	0.4	7.6	41.9	8.0	2.5	2.5
South Africa	58023	60.7	1.4	4.8	19.9	5.1	1.5	6.6
Sudan	8778	29.9	0.6	15.3	12.5	16.2	16.4	9.1
Tanzania	23345	48.2	0.2	7.2	12.9	9.6	6.8	15.1
Others	67639	42.3	1.3	7.3	30.2	5.5	4.4	9.0
Total	275271	47.8	0.9	5.9	26.7	6.0	3.3	9.4
West Asia								
Bahrain	10531	37.3	1.0	7.6	10.7	6.2	13.8	23.5
Iraq	41218	16.2	0.1	4.1	61.6	11.0	5.7	1.3
Israel	48737	56.7	0.6	1.2	31.6	2.6	0.1	7.2
Oman	62252	36.1	0.1	17.6	5.3	5.5	13.5	22.9
Saudi Arabia	42892	26.0	0.2	3.0	16.2	7.6	7.9	39.1
Turkey	25022	36.1	1.0	2.7	47.9	2.5	1.2	8.6
UAE	51513	41.0	0.3	1.4	3.3	10.9	28.4	14.7
Yemen	25019	66.6	0.3	1.2	6.5	11.7	9.5	4.2
Others	35929	25.5	1.8	4.8	24.8	12.9	7.9	22.3
Total	343113	37.2	0.4	5.5	22.8	7.5	10.2	16.4
South Asia								
Afghanistan	111370	0.4	0.1	0.0	99.1	0.1	0.1	0.2
Iran	30527	37.4	0.6	1.2	41.9	11.9	2.2	4.8
Maldives	45270	0.6	0.0	5.6	1.6	15.9	0.0	76.3
Nepal	113790	7.5	5.1	1.0	79.1	0.7	0.2	6.4
Pakistan	111794	5.7	0.1	0.2	5.5	0.0	0.1	88.4
Bangladesh	524923	0.8	12.2	1.4	2.5	0.1	0.0	83.0
Sri Lanka	262345	8.5	0.3	57.3	7.5	5.7	0.1	20.6
Bhutan	15016	0.4	27.7	1.2	51.6	0.4	0.0	18.7
Total	1215035	4.4	6.2	13.4	21.4	2.2	0.1	52.3
South East Asia								
Indonesia	33747	26.6	10.1	9.0	32.5	8.0	4.2	9.6
Malaysia	242649	10.0	2.7	33.6	14.5	8.0	2.0	29.2
Myanmar	34916	4.1	14.7	5.2	5.8	0.8	0.6	68.8
Philippines	42224	21.6	15.2	9.4	21.4	6.4	4.3	21.7
Singapore	143025	21.3	2.3	27.5	21.2	7.6	2.1	18.0
Thailand	117136	9.9	27.4	3.6	32.9	4.7	1.0	20.5
Vietnam	12312	11.9	22.3	4.6	34.9	6.4	2.9	17.0
Others	4045	8.3	24.7	4.9	40.8	5.5	4.4	11.4
Total	630054	13.9	9.6	21.4	21.0	6.8	2.1	25.2

Country of Nationality	Arrivals (in numbers)	Port-wise Distribution percentage						
		Mumbai Airport	Kolkata Airport	Chennai Airport	Delhi Airport	Bengaluru Airport	Hyderabad Airport	Others
China (Main)	174712	17.5	9.4	7.2	52.0	8.4	2.7	2.8
China (Taiwan)	35491	13.4	3.5	8.9	55.3	9.4	1.8	7.7
Japan	220283	12.9	3.4	8.7	62.4	8.2	1.1	3.3
Rep. of Korea	112619	17.8	3.9	18.0	44.8	6.2	2.0	7.3
Others	4200	7.5	2.0	2.6	63.6	16.5	0.8	7.0
Total	547305	15.4	5.4	10.1	55.0	8.0	1.8	4.3
Australasia								
Australia	218967	18.8	4.0	10.2	37.7	9.0	5.8	14.5
New Zealand	40801	28.1	3.7	7.7	36.7	6.6	6.1	11.1
Others	3806	36.7	4.5	4.5	40.8	2.5	3.6	7.4
Total	263574	20.5	4.0	9.7	37.6	8.5	5.8	13.9
Not Classified elsewhere	23333	24.5	2.5	6.6	37.2	5.6	2.6	21.0
Grand Total	6967601	19.8	3.6	9.8	33.0	6.5	3.6	23.7

Source: Bureau of Immigration, India

2.6. GENDER DISTRIBUTION OF FOREIGN TOURIST ARRIVALS IN INDIA

During the year 2013, the gender-wise distribution of FTAs comprises of 58.8% males and 41.2% females. The male-female break-up of FTAs in 2012 was 58.7% and 41.3%, respectively.

Gender wise distribution of Foreign Tourist Arrivals in India, 2013

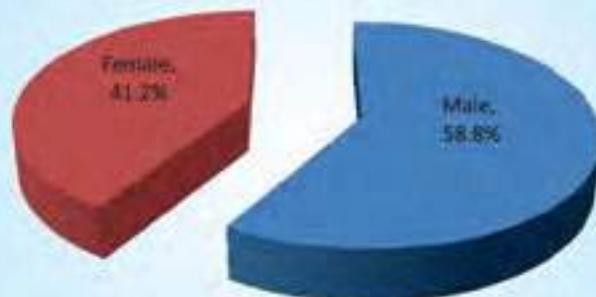


Table 2.6.1 gives the gender-wise distribution of FTAs in India during 1996-2013. Percentage of arrivals not reporting their gender was quite high in 2001 and 2002 but it gradually decreased from 2005 and in 2008 it was noticeably low at 0.1. From 2009 onwards the reporting of sex wise break-up of the FTAs has been 100%.

TABLE 2.6.1
FTAs IN INDIA ACCORDING TO GENDER, 1996-2013

Year	Arrivals	Gender Distribution percentage		
		Male	Female	Not Reported
1996	2287860	65.3	34.7	0.0
1997	2374094	61.5	38.5	0.0
1998	2358629	65.4	34.6	0.0
1999	2481928	69.5	30.5	0.0
2000	2649378	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	40.6	0.0
2012	6577745	58.7	41.3	0.0
2013	6967901	58.8	41.2	0.0

Source: Bureau of Immigration, India

The details of country-wise classification of FTAs in India according to gender during 2013 are given in Table 2.6.2. While the proportion of female for most of the countries is in the range of 30% to 50%, for some countries like Sudan, Iraq, Saudi Arabia, Yemen, Afghanistan, Japan, Pakistan and Bangladesh, etc, it was substantially low (less than 30%) in 2013. On the other hand, females outnumbered the males in FTAs in India from Argentina (52.2%), Kazakhstan (61.2%), Mauritius (55.1%), Russian Federation (57.4%), UAE (50.8%), Thailand (54.2%), Myanmar (51.3%) and China Taiwan (50.2%) during, 2013.

TABLE 2.6.2

NATIONALITY-WISE FTAs IN INDIA ACCORDING TO GENDER, 2013

Country of Nationality	Arrivals (in Numbers)	Gender-wise Distribution (%)	
		Male	Female
North America			
Canada	255222	54.1	45.9
USA	1085309	56.2	43.8
Total	1340531	55.8	44.2
Central & South America			
Argentina	10325	47.8	52.2
Brazil	18551	52.3	47.7
Mexico	13074	51.3	48.7
Others	26486	52.6	47.4
Total	68436	51.6	48.4
Western Europe			
Austria	36465	56.6	43.4
Belgium	38091	60.4	39.6
Denmark	30842	55.9	44.1
Finland	21212	53.7	46.3
France	248379	54.4	45.6
Germany	252003	60.0	40.0
Greece	7983	65.7	34.3
Ireland	27174	55.9	44.1
Italy	93951	63.5	36.5
Netherlands	69547	61.1	38.9
Norway	21462	53.6	46.4
Portugal	29612	65.4	34.6
Spain	62079	55.5	44.5
Sweden	48826	55.3	44.7
Switzerland	48821	53.6	46.4

Country of Nationality	Arrivals (in Numbers)	Gender-wise Distribution (%)	
		Male	Female
UK	809444	56.5	43.5
Others	9975	53.4	46.6
Total	1855866	57.2	42.8
Eastern Europe			
Czech Rep.	10121	63.3	36.7
Kazakhstan	14680	38.8	61.2
Poland	23785	50.6	49.4
Russian Fed.	259120	42.6	57.4
Ukraine	31826	50.6	49.4
Others	65551	48.8	51.2
Total	405083	44.9	55.1
Africa			
Egypt	15062	69.7	30.3
Kenya	40484	57.7	42.3
Mauritius	27418	44.9	55.1
Nigeria	34522	62.3	37.7
South Africa	58023	52.9	47.1
Sudan	8778	83.7	16.3
Tanzania	23345	53.3	46.7
Others	67639	56.3	43.7
Total	275271	55.8	44.2
West Asia			
Bahrain	10531	64.6	35.4
Iraq	41218	72.9	27.1
Israel	48737	62.9	37.1
Oman	62252	64.5	35.5
Saudi Arabia	42892	80.8	19.2
Turkey	25022	56.6	43.4
UAE	51513	49.2	50.8
Yemen	25019	70.6	29.4
Others	35929	68.4	31.6
Total	343113	65.6	34.4
South Asia			
Afghanistan	111370	72.8	27.2
Iran	30527	53.8	46.2
Maldives	45270	52.7	47.3
Nepal	113790	69.1	30.9
Pakistan	111794	71.2	28.8

Country of Nationality	Arrivals (in Numbers)	Gender-wise Distribution (%)	
		Male	Female
Bangladesh	524923	71.6	28.4
Sri Lanka	262345	61.7	38.3
Bhutan	15016	62.5	37.5
Total	1215035	68.0	32.0
South East Asia			
Indonesia	33747	61.5	38.5
Malaysia	242649	54.3	45.7
Myanmar	34916	48.7	51.3
Philippines	42224	53.3	46.7
Singapore	143025	60.1	39.9
Thailand	117136	45.8	54.2
Vietnam	12312	52.3	47.7
Others	4045	56.1	43.9
Total	630054	54.0	46.0
East Asia			
China (Main)	174712	65.3	34.7
China (Taiwan)	35491	49.8	50.2
Japan	220283	70.5	29.5
Rep. of Korea	112619	64.1	35.9
Others	4200	49.9	50.1
Total	547305	66.0	34.0
Australasia			
Australia	218967	58.0	42.0
New Zealand	40801	56.0	44.0
Others	3806	58.2	41.8
Total	263574	57.9	42.1
Not Classified elsewhere	23333	55.3	44.7
Grand Total	6967601	58.8	41.2

Source: Bureau of Immigration, India

2.7 AGE-WISE DISTRIBUTION OF FOREIGN TOURIST ARRIVALS IN INDIA

Table 2.7.1 gives the percentage distribution of FTAs in India according to age groups during 1996-2013. The proportion of FTAs in different age groups has not changed much in the last few years.

In 2013, the highest numbers of FTAs in India (21%) were from 35-44 years age group, followed by the age groups of 45-54 years (20%) and 25-34 years (19.1%). The lowest number of FTAs during the same period occurred in the age-group of 65 & above (7.7%).

Age-Group wise distribution of FTAs in India, 2013



TABLE 2.7.1
FTAs IN INDIA ACCORDING TO AGE-GROUP, 1996-2013

Year	FTAs	Percentage distribution by Age - Group (in years)							
		0-14	15-24	25-34	35-44	45-54	55-64	65 & above	Not Reported
1996	2287860	12.6	9.1	21.7	26.8	18.3	8.8	2.7	-
1997	2374094	9.9	10.1	23.4	26.9	18.9	8.2	2.0	0.6
1998	2358629	5.0	16.8	23.8	26.0	18.2	8.3	1.9	-
1999	2481928	3.1	14.0	23.4	27.5	20.8	9.2	2.0	-
2000	2649378	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	3918810	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

Year	FTAs	Percentage Distribution by Age - Group (in years)							
		0-14	15-24	25-34	35-44	45-54	55-64	65 & above	Not Reported
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	6967601	9.5	8.7	19.1	21.0	20.0	14.0	7.7	0.0

Source: Bureau of Immigration, India

The details of country-wise distribution of FTAs in India according to age-groups during 2013 are given in Table 2.7.2. It may be seen that the proportion of FTAs in the age-group 0-14 years was the very high for USA (19.8%), UAE (17.1%), Australia (16.5%) and Pakistan (15.9%). Furthermore the proportion of FTAs in India for the age group 25-34 years has been the highest from Eastern Europe and Africa whereas for countries of Western Europe it was the age-group 45-54 years.

TABLE 2.7.2
NATIONALITY-WISE FTAs IN INDIA ACCORDING TO AGE-GROUP, 2013

Country of Nationality	Arrivals (in numbers)	Percentage distribution by Age-Group (in years)						
		0-14	15-24	25-34	35-44	45-54	55-64	65 & Above
North America								
Canada	255222	15.5	6.9	12.1	17.7	18.2	15.3	14.3
USA	1085309	19.8	6.6	10.5	18.5	20.0	14.7	9.9
Total	1340531	19.0	6.7	10.8	18.4	19.7	14.8	11.2
Central & South America								
Argentina	10325	2.0	6.1	27.0	18.2	16.6	18.9	11.1
Brazil	18551	2.7	6.9	27.5	22.1	19.0	15.3	6.5
Mexico	13074	2.7	10.1	24.4	22.3	18.0	15.5	7.0
Others	26486	4.1	8.6	26.6	19.8	19.8	14.4	6.7
Total	68436	3.1	8.0	26.5	20.7	18.7	15.6	7.4
Western Europe								
Austria	36465	5.4	7.5	16.6	19.8	24.9	16.8	9.0
Belgium	38091	6.9	8.6	15.1	20.5	24.0	16.9	8.0
Denmark	30842	5.5	11.2	13.5	19.4	22.9	16.5	11.0
Finland	21212	4.1	6.8	16.7	24.3	25.4	16.3	6.4
France	248379	6.0	8.2	16.1	18.9	20.6	18.8	11.4
Germany	252003	3.4	7.0	17.5	20.2	28.0	15.5	8.4
Greece	7983	1.8	4.2	22.1	25.2	23.8	16.8	6.1
Ireland	27174	15.7	6.9	19.5	25.3	18.8	10.0	3.8
Italy	93951	3.1	4.8	17.1	24.3	24.0	17.5	9.2
Netherlands	69547	4.6	7.3	16.0	22.3	25.8	16.8	7.2
Norway	21462	7.7	14.0	15.5	16.6	20.9	16.4	8.9
Portugal	29612	6.6	7.6	22.0	24.1	18.9	13.6	7.2
Spain	62079	2.7	6.5	25.5	26.9	19.3	13.5	5.6
Sweden	48826	6.0	10.2	15.6	18.3	22.4	17.3	10.2
Switzerland	48821	4.3	8.2	15.8	17.8	25.1	18.9	9.9
UK	809444	10.4	6.3	13.5	19.6	21.0	17.5	11.7
Others	9975	2.8	8.6	28.1	20.3	19.5	15.5	5.2
Total	1855866	7.4	7.0	15.7	20.3	22.5	17.0	10.1
Eastern Europe								
Czech Rep	10121	2.2	5.5	31.0	27.1	17.3	12.5	4.4
Kazakhstan	14680	7.3	12.2	30.5	20.4	17.0	9.9	2.7
Poland	23785	2.4	6.6	32.0	23.9	16.6	14.2	4.3
Russian Fed.	259120	5.2	11.2	35.1	21.0	16.8	8.9	1.8
Ukraine	31826	1.6	10.6	34.8	24.4	18.2	8.6	1.8
Others	65551	3.2	7.5	30.4	25.6	18.4	11.4	3.5

Country of Nationality	Arrivals (in numbers)	Distribution by Age-Group percentage						
		0-14	15-24	25-34	35-44	45-54	55-64	65 & Above
Total	405083	4.4	10.2	34.2	22.1	17.1	9.7	2.3
Africa								
Egypt	15062	2.0	11.9	36.5	24.6	16.4	7.1	1.5
Kenya	40484	8.2	10.0	23.0	19.9	18.6	13.3	7.0
Mauritius	27418	5.7	8.2	17.0	23.2	22.4	16.7	6.8
Nigeria	34522	4.2	9.7	26.4	27.5	20.1	9.0	3.1
South Africa	58023	7.3	8.6	16.9	23.0	21.2	15.8	7.2
Sudan	8778	5.4	39.0	23.6	13.2	10.1	7.1	1.6
Tanzania	23345	6.9	13.0	16.7	21.7	20.1	14.0	7.6
Others	67639	5.2	14.8	26.4	22.7	17.6	9.9	3.4
Total	275271	5.8	11.7	23.9	22.6	18.9	12.1	5.0
West Asia								
Bahrain	10531	10.4	17.0	17.3	14.2	17.7	16.3	7.1
Iraq	41218	6.8	11.8	20.1	22.3	19.6	13.9	5.5
Israel	48737	3.2	17.1	22.2	17.3	15.4	16.5	8.3
Oman	62252	9.4	10.7	25.4	20.7	16.0	11.4	6.4
Saudi Arabia	42892	7.2	11.0	24.8	23.1	22.1	8.2	3.6
Turkey	25022	1.3	5.4	41.0	26.2	14.5	9.1	2.5
UAE	51513	17.1	15.0	19.0	14.6	14.8	12.8	6.7
Yemen	25019	7.3	20.6	21.2	18.7	16.7	10.2	5.3
Others	35929	4.8	9.8	28.3	23.3	18.6	11.1	4.1
Total	343113	8.0	13.0	24.2	20.0	17.2	12.1	5.5
South Asia								
Afghanistan	111370	12.0	22.2	27.1	16.6	11.6	7.4	3.1
Iran	30527	5.9	11.0	29.3	20.1	17.5	11.3	4.9
Maldives	45270	13.2	12.7	21.7	20.2	17.3	9.0	5.9
Nepal	113790	4.2	21.9	30.8	21.5	13.6	6.1	1.9
Pakistan	111794	15.9	14.1	16.8	16.1	16.4	11.9	8.8
Bangladesh	524923	8.7	9.8	23.9	24.7	18.6	10.6	3.7
Sri Lanka	262345	6.2	9.3	17.2	21.7	21.0	15.8	8.8
Bhutan	15016	4.2	17.3	31.7	24.9	14.9	5.2	1.8
Total	1215035	8.7	12.3	22.4	21.0	17.9	11.4	6.3
South East Asia								
Indonesia	33747	2.9	7.5	25.7	28.8	19.5	11.6	4.0
Malaysia	242649	8.2	11.3	18.8	21.7	19.7	14.4	5.9
Myanmar	34916	1.6	5.7	14.1	18.3	21.6	22.2	16.5
Philippines	42224	2.3	7.3	40.1	26.2	16.8	6.2	1.1
Singapore	143025	8.3	8.5	15.4	24.6	25.0	13.4	4.8
Thailand	117136	3.7	7.2	21.3	22.5	21.7	16.2	7.4
Vietnam	12312	1.2	8.6	28.1	24.1	17.5	14.1	6.4

Country of Nationality	Arrivals (in numbers)	Distribution by Age-Group percentage						
		0-14	15-24	25-34	35-44	45-54	55-64	65 & Above
Others	4045	2.0	9.7	30.0	18.3	15.0	14.9	10.1
Total	630054	6.3	9.1	20.0	23.0	21.1	14.3	6.2
East Asia								
China (Main)	174712	1.2	9.1	39.5	26.8	14.9	6.3	2.3
China (Taiwan)	35491	1.3	6.5	23.1	25.7	23.2	15.7	4.5
Japan	220283	3.1	6.0	20.1	25.1	24.1	14.0	7.6
Rep. of Korea	112619	5.0	12.1	21.9	25.1	22.0	11.1	2.8
Others	4200	4.1	15.7	24.3	21.5	20.5	10.6	3.3
Total	547305	2.7	8.3	26.9	25.7	20.7	11.0	4.7
Australasia								
Australia	218967	16.5	7.6	20.5	20.1	17.1	12.4	5.8
New Zealand	40801	14.9	9.0	14.5	19.9	21.8	13.9	6.0
Others	3806	4.0	9.2	21.9	20.4	21.5	15.8	7.2
Total	263574	16.1	7.8	19.5	20.1	17.9	12.7	5.9
Not Classified elsewhere	23333	3.3	5.2	21.0	23.3	19.6	14.5	13.1
Grand Total	6967601	9.5	8.7	19.1	21.0	20.0	14.0	7.7

Source: Bureau of Immigration, India

2.8 PURPOSE OF VISIT OF FOREIGN TOURIST ARRIVALS IN INDIA

Disembarkation card has the provision for recording the purpose of the visit for each foreign tourist. This data was compiled for the first time in the year 2009. Table 2.8.1 gives the percentage distribution of the FTAs according to the purpose of visit. An analysis of this data from disembarkation cards reveals that almost all the foreign tourists have recorded their purpose of visit. Country-wise data on purpose of visit, for those reporting the same, are presented in Table 2.8.2. About 30.3% of FTAs in India during 2013 were for the purpose of 'leisure, holidays and recreation' followed by the purpose of 'visiting friends & relatives' (25.9%) and 'business and professional' (20.9%). The highest proportion of visitors in the business and professional category were from China (Main) (57.6%) followed by Egypt (55.2%). Regarding the regional distribution, for business & professionals, maximum (50.9%) visitors were from East Asia followed by 25.1 % from Western Europe. For visiting friends & relatives purposes, the highest proportion of FTAs came from North America (48.4%) followed by Australasia (43.4%). For medical purposes, the highest number of FTAs came from Africa (14.2%), followed by West Asia (12.3%) and South Asia (10.4%).

TABLE 2.8.1
FTAs IN INDIA ACCORDING TO PURPOSE OF VISIT 2009 - 2013

Year	FTAs (Numbers)	Business & Professional	Leisure, Holiday & Recreation	Visiting Friends & Relatives	Medical Treatment	Education	Others
2009	5167699	15.1	57.5	17.6	2.2	-	7.6
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

TABLE 2.8.2
**CLASSIFICATION OF FTAs IN INDIA ACCORDING TO PURPOSE
OF VISIT, 2013**

Country of Nationality	FTAs (Numbers)	Business & Professional	Leisure, Holiday & Recreation	Visiting Friends & Relatives	Medical Treatment	Education	Others
North America							
Canada	255222	9.7	19.1	57.9	0.4	0.7	12.2
USA	1085309	19.4	16.8	46.2	0.3	0.9	16.4
Total	1340531	17.5	17.2	48.4	0.3	0.9	15.7
Central & South America							
Argentina	10325	16.5	58.3	3.2	0.4	1.2	20.4
Brazil	18551	31.3	42.7	6.6	0.2	1.3	17.9
Mexico	13074	24.1	49.8	5.6	0.1	2.0	18.4
Others	26486	22.0	45.2	11.5	0.6	3.1	17.6
Total	68436	24.0	47.4	7.8	0.4	2.1	18.3
Western Europe							
Austria	36465	24.7	44.0	17.1	0.6	1.0	12.6
Belgium	38091	28.5	43.6	15.9	0.2	0.9	10.9
Denmark	30842	35.9	42.8	10.3	0.3	0.9	9.8
Finland	21212	40.4	41.0	8.4	0.2	0.8	9.2
France	248379	22.6	50.4	12.0	0.2	1.3	13.5
Germany	252003	34.1	39.6	13.0	0.4	1.2	11.7
Greece	7983	33.9	39.3	7.7	0.2	1.0	17.9
Ireland	27174	26.3	31.1	29.1	0.3	1.1	12.1

Country of Nationality	FTAs (Numbers)	Business & Professional	Leisure, Holiday & Recreation	Visiting Friends & Relatives	Medical Treatment	Education	Others
Italy	93951	34.0	44.9	7.4	0.2	0.9	12.6
Netherlands	69547	35.6	38.3	13.9	0.2	0.8	11.2
Norway	21462	22.0	42.1	25.3	0.4	1.2	9.0
Portugal	29612	16.3	31.3	29.3	0.4	0.6	22.1
Spain	62079	24.6	53.4	7.4	0.2	0.8	13.6
Sweden	48826	35.9	39.9	12.8	0.3	1.0	10.1
Switzerland	48821	22.0	49.8	14.3	0.7	0.9	12.3
UK	809444	19.6	27.9	38.4	0.3	0.4	13.4
Others	9975	23.4	52.9	10.1	0.5	1.2	11.9
Total	1855866	25.1	37.2	23.8	0.3	0.8	12.8
Eastern Europe							
Czech Rep.	10121	34.1	45.8	6.2	0.3	1.1	12.5
Kazakhstan	14680	12.0	43.5	7.1	4.3	2.3	30.8
Poland	23785	22.5	57.9	7.3	0.3	1.0	11.0
Russian Fed.	259120	16.0	54.9	5.2	2.1	1.1	20.7
Ukraine	31826	18.9	47.6	7.3	1.8	1.2	23.2
Others	65551	25.9	37.7	8.3	7.8	3.0	17.3
Total	405083	20.4	49.7	6.5	3.1	1.6	18.7
Africa							
Egypt	15062	55.2	14.2	4.6	1.1	3.1	21.8
Kenya	40484	15.5	17.8	20.4	9.2	2.1	35.0
Mauritius	27418	12.0	51.2	13.2	5.1	3.8	14.7
Nigeria	34522	27.9	6.2	3.4	42.4	9.4	10.7
South Africa	58023	26.5	46.3	12.9	0.9	1.1	12.3
Sudan	8778	17.3	8.0	5.9	9.1	34.9	24.8
Tanzania	23345	14.0	17.8	12.4	18.5	11.0	26.3
Others	67639	28.6	14.2	10.5	13.9	15.6	17.2
Total	275271	23.9	23.2	11.2	14.2	8.7	18.8
West Asia							
Bahrain	10531	8.3	27.2	21.1	5.1	3.8	34.5
Iraq	41218	5.1	5.6	3.0	53.5	15.1	17.7
Israel	48737	35.5	44.4	3.8	0.2	0.4	15.7
Oman	62252	5.5	29.3	10.2	12.5	1.2	41.3
Saudi Arabia	42892	11.7	38.1	8.1	5.0	1.9	35.2
Turkey	25022	47.1	34.2	4.3	0.2	1.3	12.9
UAE	51513	5.3	28.2	18.5	8.0	0.3	39.7
Yemen	25019	10.9	19.3	10.8	13.3	16.6	29.1
Others	35929	26.8	30.7	9.8	3.1	3.7	25.9
Total	343113	14.9	29.0	9.7	12.3	4.0	30.1

Country of Nationality	FTAs (Numbers)	Business & Professional	Leisure, Holiday & Recreation	Visiting Friends & Relatives	Medical Treatment	Education	Others
South Asia							
Afghanistan	111370	9.1	9.9	7.4	45.3	8.8	19.5
Iran	30527	9.7	35.2	12.9	0.9	14.3	27.0
Maldives	45270	2.0	24.0	7.9	50.1	2.7	13.3
Nepal	113790	16.2	9.9	10.1	8.6	8.4	46.8
Pakistan	111794	9.3	21.1	53.6	2.6	0.1	13.3
Bangladesh	524923	5.5	25.5	27.5	6.8	0.8	33.9
Sri Lanka	262345	22.3	32.8	18.0	1.5	2.4	23.0
Bhutan	15016	21.0	11.9	3.0	4.6	6.6	52.9
Total	1215035	9.8	24.3	23.6	10.4	2.6	29.3
South East Asia							
Indonesia	33747	27.6	39.1	11.1	0.9	2.5	18.8
Malaysia	242649	11.5	44.1	26.5	0.6	4.6	12.7
Myanmar	34916	5.3	77.2	2.9	2.2	1.8	10.6
Philippines	42224	42.0	20.2	13.0	0.5	0.9	23.4
Singapore	143025	26.2	25.0	36.4	0.4	0.7	11.3
Thailand	117136	12.9	63.3	6.1	0.1	4.3	13.3
Vietnam	12312	24.3	51.7	4.2	0.1	5.2	14.5
Others	4045	24.8	44.1	4.9	4.3	7.9	14.0
Total	630054	16.8	45.7	20.4	0.6	3.3	13.2
East Asia							
China (Main)	174712	57.6	27.2	4.2	0.1	1.0	9.9
China(Taiwan)	35491	30.3	52.1	8.0	0.1	0.6	8.9
Japan	220283	53.4	34.5	3.4	0.0	0.4	8.3
Rep. of Korea	112619	43.2	35.1	4.7	0.1	4.1	12.8
Others	4200	18.4	23.0	6.1	9.8	19.4	23.3
Total	547305	50.9	33.5	4.2	0.1	1.5	9.8
Australasia							
Australia	218967	16.6	28.4	43.6	0.3	0.5	10.6
New Zealand	40801	15.3	26.7	44.5	0.3	0.6	12.6
Others	3806	24.5	21.6	20.1	13.7	7.2	12.9
Total	263574	16.5	28.1	43.4	0.5	0.6	10.9
Not Classified elsewhere	23333	22.1	25.2	24.5	1.0	1.1	26.1
Grand Total	6967601	20.9	30.3	25.9	3.4	1.9	17.6

Source: Bureau of Immigration, India

2.9 TOP 15 SOURCE COUNTRIES FOR FOREIGN TOURIST ARRIVALS IN INDIA

Table 2.9.1 gives the percentage shares and ranks of top 15 source countries for India during 2012 and 2013. The top 15 tourist generating countries for India during 2013 were mostly the same as those during 2012 though, there have been minor changes in the rankings of some countries in 2013 and Rep of Korea was replaced by Thailand. While Russian Fed and Malaysia improved their rankings in 2013, decline in rank was observed for Canada, Norway, France, Japan, Australia and Nepal. FTAs in India from United States of America (USA) were the 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%), Germany (3.62%), France (3.56%), Malaysia (3.48%), Japan (3.16 %), Australia (3.14%), China (Main) (2.51%), Singapore (2.05%), Thailand (1.68%) and Nepal(1.63%).

The share of FTAs from top 15 countries during the year 2013 was 70.72% as compared to 71.37% in 2012.

TABLE 2.9.1
TOP 15 SOURCE COUNTRIES FOR FTAs IN INDIA DURING, 2012 & 2013

2012				2013			
Country	Rank	FTAs	% Share	Country	Rank	FTAs	% Share
USA	1	1039947	15.81	USA	1	1085309	15.58
UK	2	788170	11.98	UK	2	809444	11.62
Bangladesh	3	487397	7.41	Bangladesh	3	524923	7.53
Sri Lanka	4	296983	4.51	Sri Lanka	4	262345	3.77
Canada	5	256021	3.89	Russian Fed.	5	259120	3.72
Germany	6	254783	3.87	Canada	6	255222	3.66
France	7	240674	3.66	Germany	7	252003	3.62
Japan	8	220015	3.34	France	8	248379	3.56
Australia	9	202105	3.07	Malaysia	9	242649	3.48
Malaysia	10	195853	2.98	Japan	10	220283	3.16
Russian Fed.	11	177526	2.70	Australia	11	218967	3.14
China(Main)	12	168952	2.57	China(Main)	12	174712	2.51
Singapore	13	131452	2.00	Singapore	13	143025	2.05
Nepal	14	125375	1.91	Thailand	14	117136	1.68
Rep. of Korea	15	109469	1.66	Nepal	15	113790	1.63
Total of top 15 Countries		4694722	71.37	Total of top 15 Countries		4927307	70.72
Others		1883023	28.63	Others		2040294	29.28
All Countries		6577745	100.00	Grand Total		6967601	100.00

Source: Bureau of Immigration, India

The FTAs from the top 15 source countries for the years 1981 to 2013 are given in Table 2.9.2. The share of these 15 countries in total FTAs in India shows a generally increasing trend from 1981. This share, which was 49.6% in 1981, increased to 71.37% in 2012 and showed minor decline to 70.72% in 2013..

TABLE 2.9.2

FTAs IN INDIA DURING, 1981-2013 FROM TOP 15 SOURCE COUNTRIES OF 2013

Year	USA	UK	Bangladesh	Sri Lanka	Russian Fed.*	Canada	Germany	France
	1	2	3	4	5	6	7	8
1981	82052	116684	192509	75842	N.A.	25358	55471	57272
1982	86806	120772	205410	76143	N.A.	25991	50885	59267
1983	95847	136823	213832	81716	N.A.	29857	52120	50158
1984	95651	124205	247543	75449	N.A.	25135	48930	47148
1985	95920	119544	272350	69063	N.A.	29022	45738	44091
1986	125364	160685	204260	75631	N.A.	39837	64811	65948
1987	134876	166590	185296	74351	N.A.	37677	72300	64432
1988	122888	200509	200617	70640	N.A.	37498	77543	69799
1989	134314	229496	213451	67680	N.A.	40306	78812	78001
1990	125303	235151	225566	68400	N.A.	41046	71374	79496
1991	117332	212052	251260	70088	32432	36142	72019	69346
1992	152288	244263	246589	71935	39409	43386	84422	74304
1993	158159	274168	277565	76898	48644	47800	83340	70694
1994	176482	300696	282271	89009	49684	56441	85352	73088
1995	203343	334827	318474	114157	27145	63821	89040	82349
1996	228829	360686	322355	107351	22037	74031	99853	93325
1997	244239	370567	355371	122080	18243	78570	105979	91423
1998	244687	376513	339757	118292	29493	80111	93993	97898
1999	251926	345085	414359	120072	34620	82892	85033	85891
2000	348292	432644	414437	129193	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

Year	USA	UK	Bangladesh	Sri Lanka	Russian Fed.*	Canada	Germany	France
	1	2	3	4	5	6	7	8
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
2008	804933	776530	541884	218805	91095	222364	204344	207802
2009	827140	769251	468899	239995	94945	224069	191616	196462
2010	931292	759494	431962	266515	122048	242372	227720	225232
2011	980688	798249	463543	305853	144312	259017	240235	231423
2012	1039947	788170	487397	296983	177526	256021	254783	240674
2013	1085309	809444	524923	262345	259120	255222	252003	248379
CAGR % (1981-2013)	8.4%	6.2%	3.2%	40.0%	9.9%	7.5%	4.8%	4.7%

CAGR: Compound annual growth rate

Table 2.9.2 continued...

FTAs IN INDIA DURING 1981-2013 FOR TOP 15 SOURCE COUNTRIES OF 2013

Year	Malaysia	Japan	Australia	China (Main)	Singapore	Thailand*	Nepal
	9	10	11	12	13	14	15
1981	26458	29032	20940	1371	17950	N.A.	11851
1982	26552	29103	23395	2107	19026	N.A.	12115
1983	25796	26662	23436	1716	21252	N.A.	12001
1984	22993	29566	24546	1386	19204	N.A.	13401
1985	23265	30573	22047	2247	18485	N.A.	15883
1986	26209	36402	33264	1533	24189	N.A.	13957
1987	28480	46240	32883	1705	26380	N.A.	16965
1988	29635	49244	31462	2099	27565	N.A.	19715
1989	33120	58707	30443	2727	29377	N.A.	19116

Year	Malaysia	Japan	Australia	China(Main)	Singapore	Thailand*	Nepal
	9	10	11	12	13	14	15
1990	34278	59122	30076	3089	32570	N.A.	20614
1991	30617	46655	22700	3476	28363	N.A.	21834
1992	35201	60137	26646	4778	35039	N.A.	25244
1993	35334	49616	28795	5157	40223	N.A.	28048
1994	40762	63398	33142	5833	44157	N.A.	34732
1995	50039	76042	36150	5111	48632	N.A.	34562
1996	53370	99018	48755	5613	47136	N.A.	43426
1997	60401	99729	50647	7369	52004	N.A.	43155
1998	47496	89565	57807	4312	54328	N.A.	38199
1999	52613	73373	73041	6487	53310	N.A.	25859
2000	60513	98159	53995	14420	46612	N.A.	38801
2001	57869	80634	52691	13901	42824	18623	41135
2002	63748	59709	50743	15422	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	119022	92404	119131
2012	195853	220015	202105	168952	131452	105141	125375
2013	242649	220283	218967	174712	143025	117136	113790
CAGR(%) (1981-2013)	7.2%	6.5%	7.6%	16.4%	6.7%	16.6%	7.3%

Source: Bureau of Immigration, India

CAGR: Compound Annual Growth rate

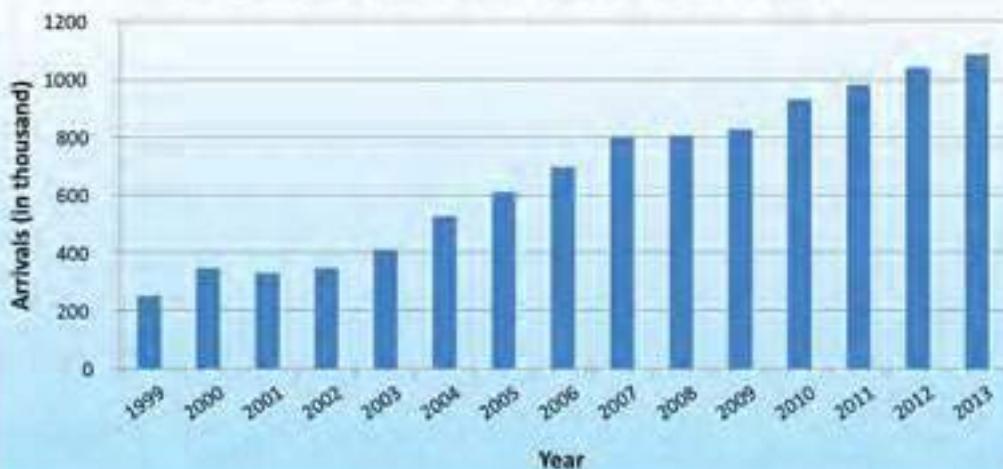
* For Russian Fed. CAGR is for the period from 1991 to 2013 & Thailand CAGR is for the period from 2001 to 2013.

DETAILS OF FOREIGN TOURIST ARRIVALS FROM TOP 15 SOURCE COUNTRIES FOR 2013 ARE DISCUSSED AS UNDER:

L UNITED STATES OF AMERICA (USA)

United States of America maintained its position as the largest market for India during 2013. The arrivals grew from 82052 in 1981 to 1085309 in 2013 at a CAGR of 8.4 %. The share of USA in the total FTAs in India decreased marginally to about 15.58% during 2013 as compared to 15.81 % during 2012. The following graph shows the yearly trend in the tourist arrivals from USA during 1999-2013.

Foreign Tourist Arrivals in India from USA, 1999-2013

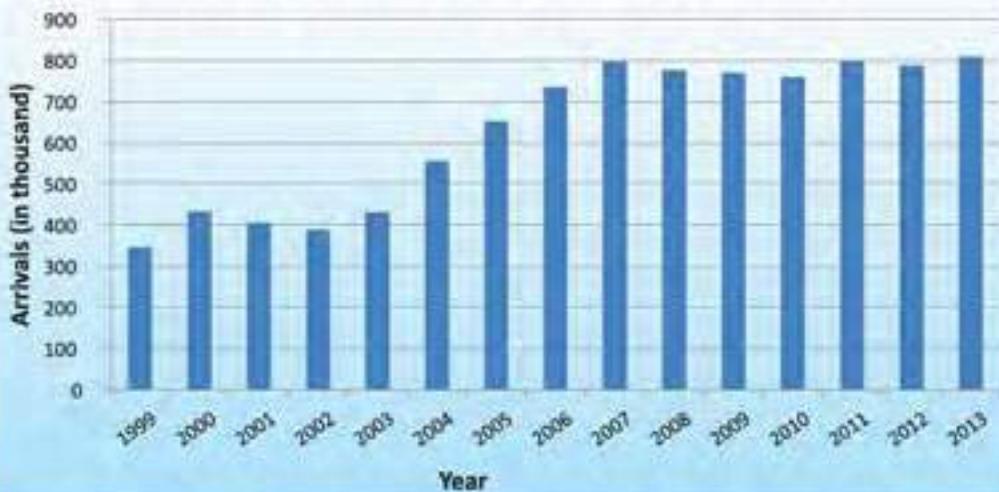


During 2013, 99.4% of the tourists from USA came by air, 0.5% by land and 0.1% by Sea. So far as port of disembarkation is concerned, 31.4% disembarked at Delhi airport followed by Mumbai airport 25.7%, Bengaluru airport 10.4%, Hyderabad airport 8.5%, Chennai airport 8.3% and 1.9% at, Kolkata airport. 13.8% of the arrivals from USA disembarked at other Ports. to India. While 56.2% of the arrivals were male, 43.8% were female. The dominant age-groups among them were 45-54 years 20.0% followed by the 0-14 years 19.8% and 35-44 years 18.5%. The highest number of tourists arrived in the 4th quarter of the year i.e. October to December 31.2%, followed by Jan-March 25.7%. Amongst tourists from USA the highest came to India in 2013 for the purpose of 'Visiting friends & relatives' 46.2% followed by 'Business & Professional' 19.6% and 'Leisure, Holidays and Recreation' 16.8%.

ii. UNITED KINGDOM (UK)

The United Kingdom has been the second largest amongst tourist generating markets for India in the year 2013 as in the past few years. The arrivals grew from 116684 in 1981 to 809444 in 2013 at a CAGR of 6.2%. The share of UK in the total FTAs in India decreased marginally to about 11.62% during 2013 as compared to 11.98% during 2012. The graph regarding tourist arrivals from United Kingdom during 1999–2013, shows that while the growth in arrivals from 1999 to 2003 was low, it was substantial during 2003 to 2007. The arrivals showed marginal decline during 2008 to 2010, it was followed by positive growths in 2011 and 2013.

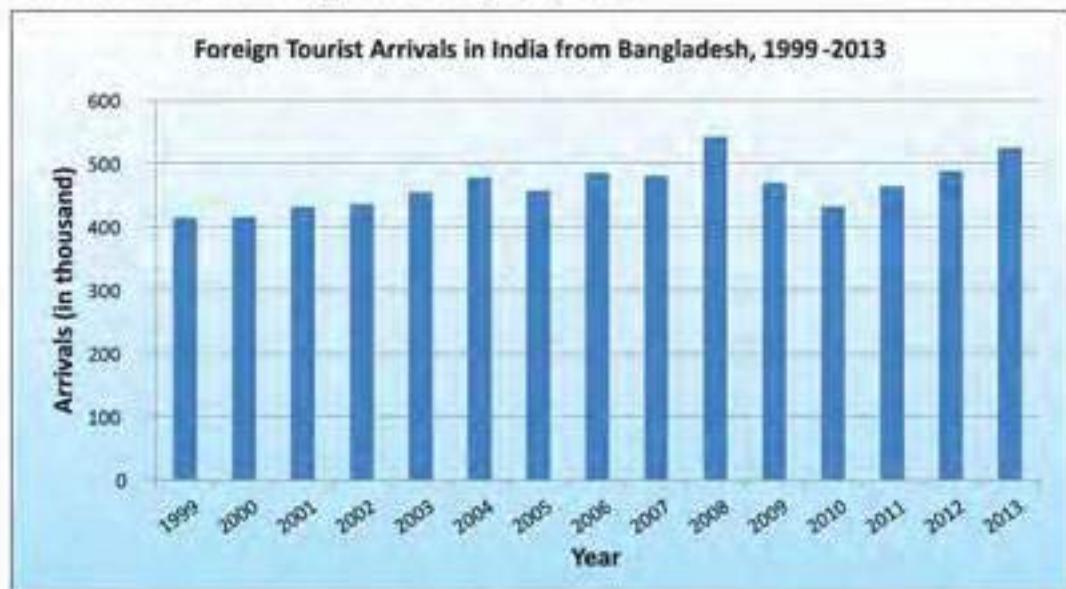
Foreign Tourist Arrivals in India from UK, 1999-2013



During the year 2013, majority of UK nationals travelled to India by air (99.5%) followed by land route (0.3%) and (0.2%) sea route. As far as port of disembarkation is concerned, maximum numbers disembarked at Mumbai airport and Delhi airport (30.4%). Disembarkations at other major ports were as follows: Bengaluru airport (5.7%), Chennai airport (4.9%), Hyderabad airport (2.2%) and Kolkata airport (2.0%). Of the total U.K. nationals who arrived in India, 56.5% were male and 43.5% were female. The most predominant age group in the FTAs was 45-54 years with 21.0% of the tourists, followed by the age groups 35-44 years and 55-64 years with 19.6% and 17.5% tourists, respectively. The highest number of arrivals was recorded during the quarter January to March (34.4%), followed closely by the quarter October to December (31.3%). Amongst the tourist from UK the highest number came to India during 2013 for 'Visiting friends & relatives' (38.4%) followed by 'Leisure, Holiday & Recreation' (27.9%) and 'Business and Professional' (19.6%).

III. BANGLADESH

Bangladesh continued to occupy the third position in terms of tourist arrivals in India with 7.53% share during 2013. The arrivals from Bangladesh grew to 524923 in 2013 from 192509 during 1981, with a CAGR of 3.2 %. The following graph shows the yearly trends in the tourist arrivals from Bangladesh during 1999-2013.

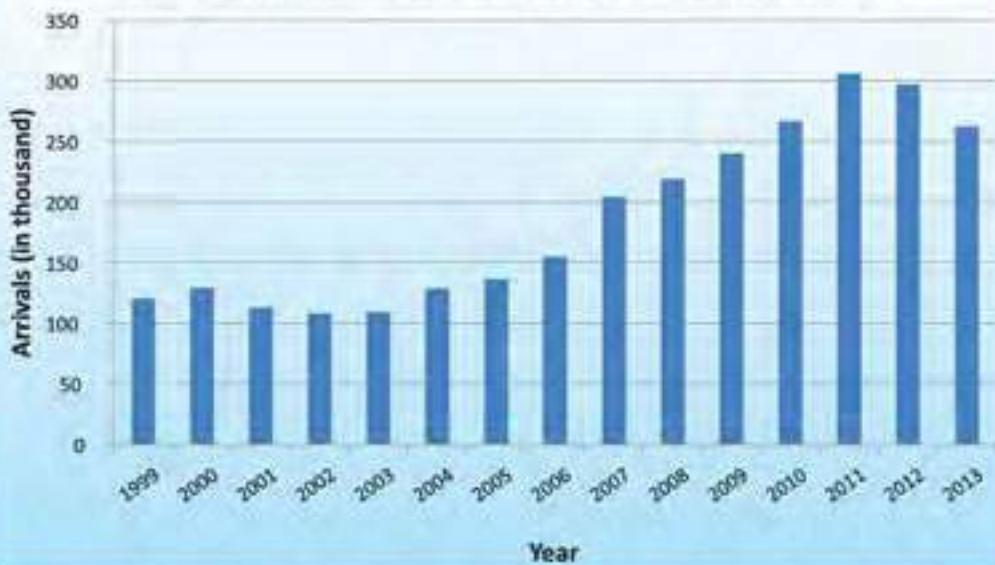


The most preferred mode of travel for nationals from Bangladesh in 2013 was land (83.0%), followed by air route (17.0%). During 2013, out of total arrivals from Bangladesh, 71.6% were male and 28.4% were female. The dominant age group was 35-44 years with 24.7% tourists, followed by the age groups 25-34 years (23.9%) and 45-54 years (18.6%). Arrivals were maximum during the quarter October-December (31.4%) followed by the quarter July-September (24.6%). The maximum tourist from Bangladesh came to India during 2013 for 'Visiting friends & relatives' (27.5%) followed by 'Leisure, Holiday and Recreation' (25.5%).

IV. SRI LANKA

Sri Lanka has been placed at fourth position among the top 15 tourist generating countries for India with 3.77% of the total tourist arrivals during 2013. Arrivals from Sri Lanka, which were 75842 in 1981, grew up to 262345 in 2013 at a CAGR of 4.0%. The following graph shows the yearly trend in the tourist arrivals from Sri Lanka during 1999-2013. While there was no uniform pattern in arrivals from Sri Lanka during 1998-2003, the arrivals continuously increased 2003 to 2011. However, there was a decline in the tourist arrivals from Sri Lanka during 2012 & 2013.

Foreign Tourist Arrivals in India from Sri Lanka, 1999-2013

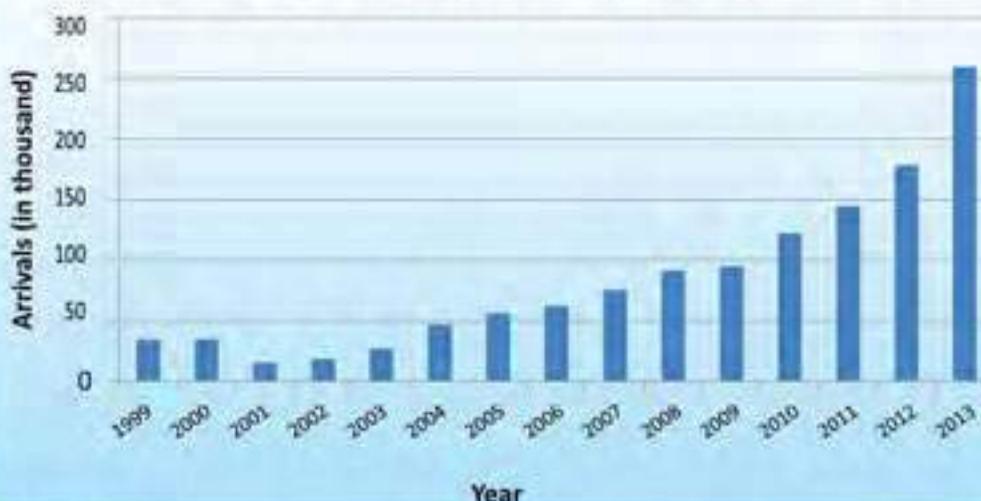


The peak quarter for Sri Lankan tourists visiting India during 2013 was January-March (28.2%), followed by October-December (27.6%). During 2013, the highest number of tourists (98.7%) arrived by air followed by land (1.0%) and sea (0.3%). As far as port of disembarkation is concerned, maximum arrivals from Sri Lanka disembarked at Chennai airport (57.3%), followed by Mumbai (8.5%), Delhi (7.5%), Bangalore (5.7%) and Kolkata airport (0.3%). Out of the total Sri Lankan nationals who visited India during 2013, majority (61.7%) were male and remaining (38.3%) were female. The dominant age-group was 35-44 years (21.7%), followed by the age group 45-54 years (21.0%) and 25-34 years (17.2%). Amongst tourist from Sri Lanka the highest number came to India for 'Leisure, holidays & recreation' (32.8%) during 2013. Some of other major purposes included 'Business and Professional' (22.3%) and 'visiting friends relatives' (18.0%).

v. RUSSIAN FEDERATION

Russian Federation occupied fifth position in terms of tourist arrivals in India with 3.72% share during 2013. It got a place among the top 15 source markets for the first time in 2008. The FTAs from Russia were 32432 in 1991. It increased to 259120 in 2013 with a CAGR of 9.9% since 1991. The following graph exhibits the tourist arrivals from Russian Federation during 1999-2013. From 2001 onwards, an increasing trend has been observed in FTAs from Russian Federation.

Foreign Tourist Arrivals in India from Russian Fed., 1999-2013

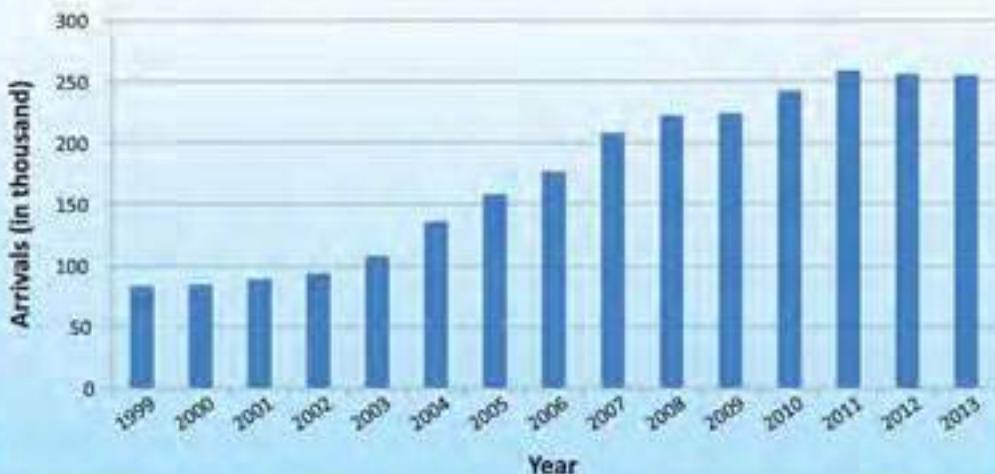


The predominant mode of travel for Russians was air accounting for 99.4% of tourists, followed by sea (0.3%) and (0.3%) land. Of the total arrivals from Russian Federation during 2013, majority (57.4%) were female. The dominant age group was 25-34 years, accounting for 35.1% of tourists followed by 35-44 years age-group (21.0%). The peak quarter for tourists from Russian Federation during 2013 was January-March (44.0%) followed by October-December (42.0%). During 2013, amongst the tourists from Russian Federation highest number came to India for 'Leisure, Holidays & Recreation' (54.9%). Some of other major purposes included 'Business & professional' (16.0%) and 'visiting friends and relatives'(5.2%).

vi. CANADA

Canada occupied sixth position in 2013 among top tourist generating countries for India. The arrivals from this country have risen to 255222 in 2013 from 25358 in 1981 at a CAGR of 7.5 %. The share of Canada in the total foreign tourist traffic in India was 3.66% in 2013 as compared to 3.89% in 2012. The following graph on tourist arrivals from Canada during 1999-2013, shows that the growth during 2003-2011 has been much higher as compared to the growth during period 1998-2002. After a period of sustained growth decline was observed in tourist arrivals from Canada during 2012 and 2013.

Foreign Tourist Arrivals in India from Canada, 1999-2013

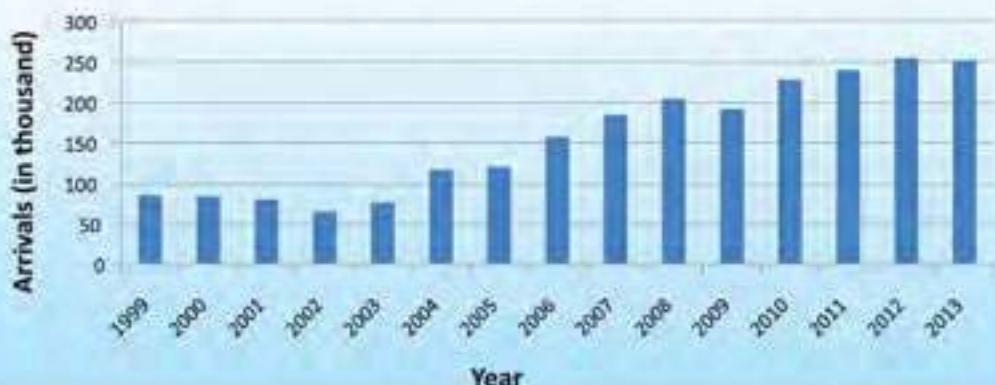


Among 255222 Canadian nationals who visited India during 2013, 99.4 % travelled by air and 0.5% travelled by land. As far as port of disembarkation is concerned, 55.4% disembarked at Delhi airport, followed by 20.3% at Mumbai, 5.9% at Chennai, 4.6% at Bengaluru, 2.7% at Hyderabad, and 1.6% at Kolkata airport. Of the total arrivals, 54.1% were male and 45.9 % were female. The predominant age-group was 45-54 years (18.2%) followed by the age group 35-44 years (17.7%) and 0-14 years (15.5%), respectively. The quarter October-December accounted for 35.6% of the arrivals, followed by the quarter January- March with 33.8% during the year 2013. Amongst the tourist from Canada the highest number came to India during 2013 for 'Visiting friends & relatives' (57.9%) followed by 'Leisure, Holiday & Recreation (19.1%).

vii. GERMANY

During the year 2013, Germany slipped to seventh rank from its sixth rank in 2012 among the top tourist generating countries for India and contributed 3.62 % of the total FTAs in India. The arrivals grew from 55471 in 1981 to 252003 in 2013 at a CAGR of 4.8%. The following graph shows that while the tourist arrivals from Germany had declined during 1999-2002, continuous increase was observed during 2005 to 2008. After a decline in 2009, tourist arrivals in India from Germany again showed an increasing trend during 2010, 2011 and 2012. A decline, however, was observed for tourist arrivals during 2013.

Foreign Tourist Arrivals in India from Germany, 1999-2013

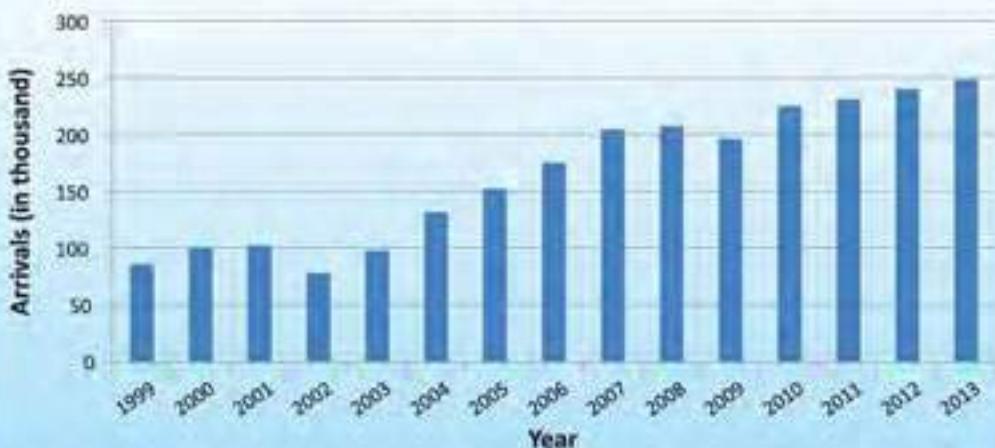


The most preferred mode of travel to India by the German tourists during 2013 was air (98.9%), followed by land (0.6%), and Sea (0.5%). As far as port of disembarkation is concerned, (41.5%) disembarked at Delhi airport, followed by Mumbai (20.5%), Bengaluru (10.7%), Chennai (8.6%), Kolkata (2.3%) and Hyderabad (1.1%) airports. Of the total German national arrivals in India during 2013, 60.0% were male and 40.0% were female. The age group 45-54 years dominated the arrivals (28.0%), followed by 35-44 years (20.2 %) and 25-34 years (17.5%). The peak quarter of arrivals of German nationals during 2013 was January-March (33.1%) followed by October - December (30.1%). During 2013, the highest number of tourists from Germany came to India for 'Leisure, Holiday & Recreation' (39.6%), followed by 'Business and Professional' (34.1%) .

viii. FRANCE

During the year 2013, France slipped to eighth rank from its seventh rank in 2012 among the top tourist generating countries for India and contributed 3.56 % of the total FTAs in India. The arrivals grew from 57272 in 1981 to 248379 in 2013 at a CAGR of 4.7%. The following graph shows that there has been an increasing trend in tourist arrivals from France since 2002, except for the year 2009. The tourist arrivals from France have showed a sustained increasing trend during the last 4 years.

Foreign Tourist Arrivals in India from France, 1999-2013

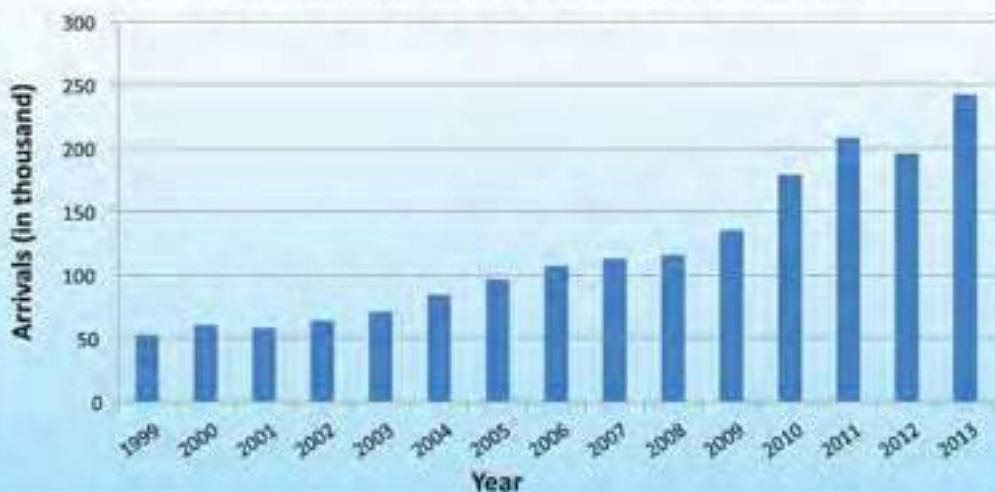


During 2013, 99.3% of the arrivals from France visited India by air, 0.6% by land route and 0.1% by sea route. As far as port of disembarkation is concerned, 45.9% disembarked at Delhi airport followed by Chennai (20.4%), Mumbai (16.5%) and Bengaluru (9.2%). Of the total French arrivals, 54.4% were male and 45.6% were female. The age groups 45-54 years accounted for maximum arrivals (20.6%) closely followed by age group 35-44 years (18.9%) and age group 55-64 years (18.8%). During 2013, the quarters January- March and October – December were the most popular for the French tourists, accounting for 32.5% and 27.1%, of the arrivals respectively. Among the tourists from France the highest number came to India during 2013 for 'Leisure, Holidays & Recreation' (50.4%) followed by 'Business and Professional' (22.6%) and 'Visiting friends & relatives' (12.0%).

ix. MALAYSIA

During 2013, Malaysia occupied the ninth position among tourist generating countries for India with a share of 3.48%. During 2012, it had occupied 10th position among tourist generating countries for India. The tourist traffic from Malaysia increased from 26458 in 1981 to 242649 in 2013, with a CAGR of 7.2%.

Foreign Tourist Arrivals in India from Malaysia, 1999-2013

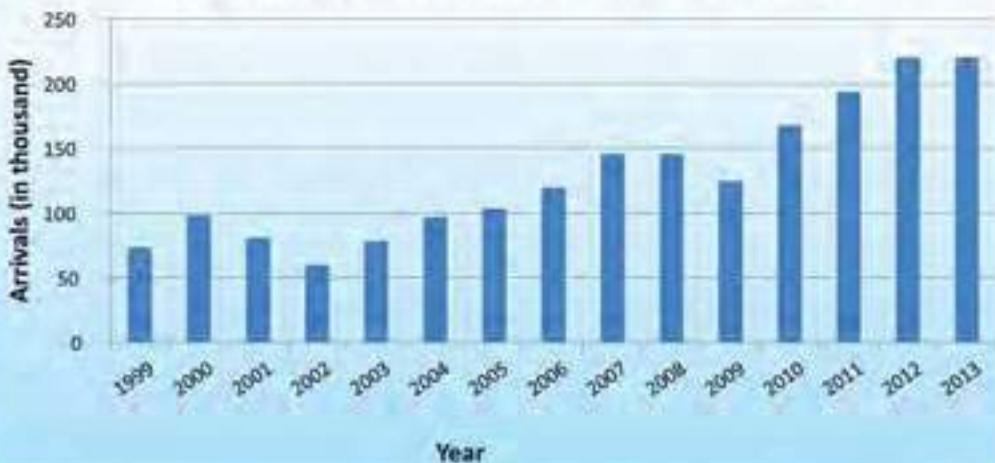


Air was the predominant mode of travel for Malaysian tourists with 99.0% arrivals during 2013. As far as port of disembarkation is concerned, the maximum number of Malaysian tourists disembarked at Chennai airport (33.6%), followed by Delhi (14.5%), Mumbai (10.0%) and Bengaluru (8.0%). During 2013, 54.3% of FTAs from Malaysia in India were male. The dominant age-group of the arrivals were 35-44 years with 21.7% of tourists followed by 45-54 years (19.7%) and 25-34 years (18.3%). The peak quarter of visit for Malaysians during 2013 was October-December (31.7%) followed by January-March (24.7%). During 2013, amongst the tourists from Malaysia the highest number came to India for 'Leisure, Holiday & Recreation' (44.1%) followed by 'Visiting friends & relatives' (26.5%).

x. JAPAN

Japan is one of the most important tourist generating markets for India in the East Asia, and it contributed 3.16% to the total FTAs in India during 2013. During 2013, Japan occupied tenth position among tourist generating countries of the world. The arrivals from Japan grew from 29032 in 1981 to 220283 in 2013 at a CAGR of 6.5 %. The following graph shows the tourist arrivals from Japan during 1999-2013.

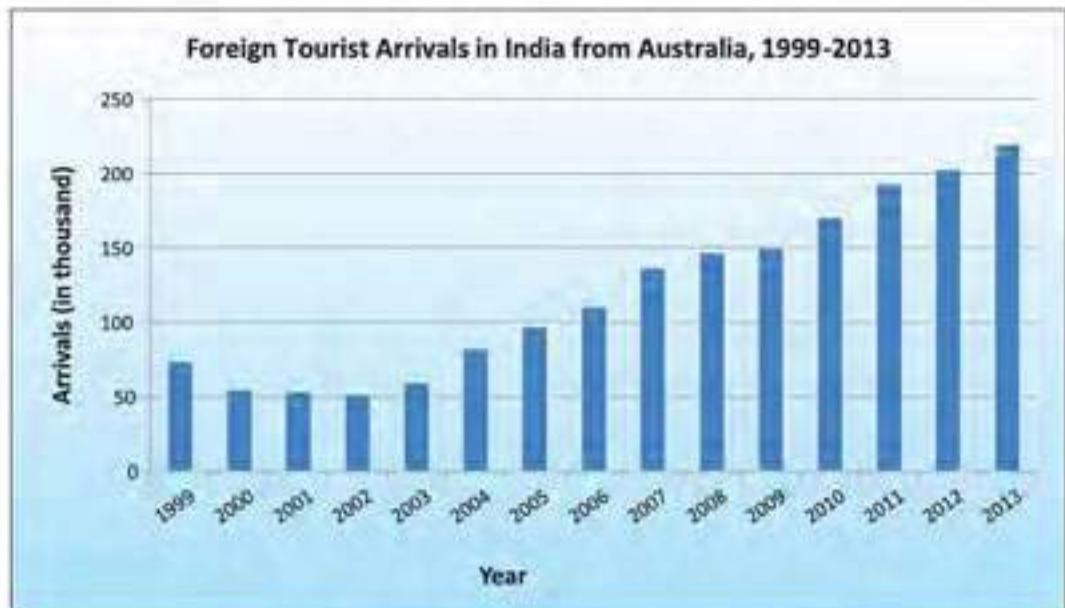
Foreign Tourist Arrivals in India from Japan, 1999-2013



During the year 2013, 98.9% of tourists from Japan visited India by air, 1.0% land and 0.1% by sea routes. As far as port of disembarkation is concerned, 62.4% disembarked at Delhi airport followed by Mumbai (12.9%), Chennai (8.7%), and Bengaluru (8.2%). Of the total Japanese nationals who arrived in India, majority (70.5%) were male & (29.5%) were female.. The dominant age-group of Japanese tourists was 35-44 years contributing about 25.1% of tourist arrivals followed by the age group 45-54 years (24.1%) and 25-34 years (20.1%). The maximum number of tourists arrived in the quarter January-March (29.1%) followed by October - December (26.9%). During 2013, amongst the tourists from Japan to India 'Business and Professional' (53.4%) followed by 'Leisure, Holiday & Recreation' (34.5%), were the main purpose of visit.

xi. AUSTRALIA

During the year 2013, Australia slipped to eleventh rank from its ninth rank in 2012 among the top tourist generating countries for India and contributed 3.14 % of the total FTAs in India. The tourist traffic from Australia during 1981 was 20940 which increased to 218967 in 2013, showing a CAGR of 7.6 %. The following graph shows that the tourist arrivals from Australia had a declining trend from 1999 to 2002, and an increasing trend , thereafter.

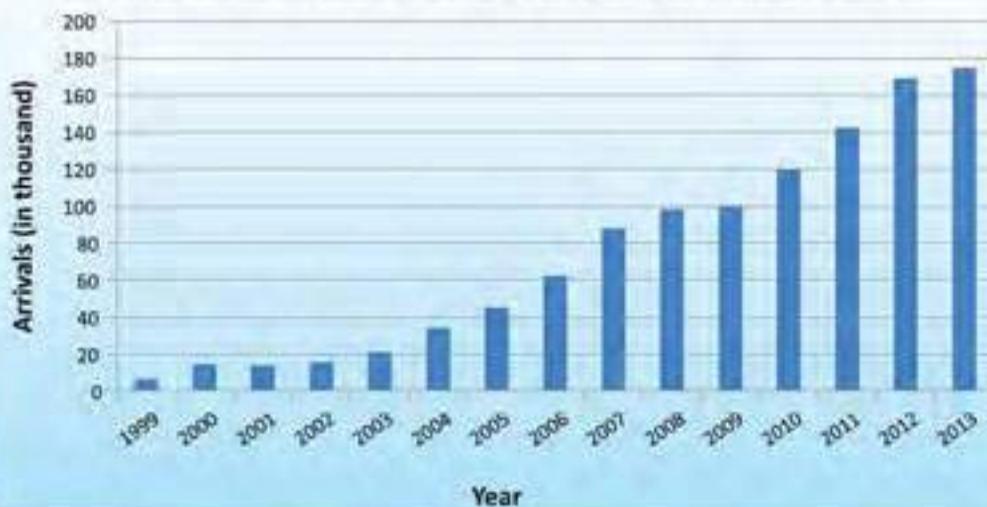


Air was the predominant mode of travel for Australian tourists accounting for 99.2% of the total arrivals during 2013. As far as port of disembarkation is concerned, the maximum tourists disembarked at Delhi airport (37.7%), followed by Mumbai (18.8%), Chennai (10.2%) and Bengaluru (9.0%). During 2013, majority of the tourists (58.0%) from Australia were male. The age group 25-34 years with 20.5% of tourists dominated the arrivals, followed by 35-44 years (20.1%). The peak quarter of visit by Australians during 2013 was October-December (39.7%) followed by the quarter January-March (25.7%). During 2013, the maximum tourists from Australia came to India for 'Visiting friends & relatives' (43.6%) followed by 'Leisure, Holiday & Recreation' (28.4%) and 'Business and Professional' (16.6%).

xii. CHINA (MAIN)

During the year 2013, China (Main) occupied twelfth position among the tourist generating markets in India, with 2.51% share in total arrivals. During 2012 also it had occupied the same position. The arrivals from China (Main) were merely 1371 in 1981 but have grown to 174712 in 2013 at a CAGR of 16.4%. The following graph shows the trend in the tourist arrivals from China (Main) from 1999 to 2013. It can be seen that till 2000 there was no specific pattern in arrivals, however, henceforth it has been showing an increasing trend.

Foreign Tourist Arrivals in India from China (Main), 1999-2013

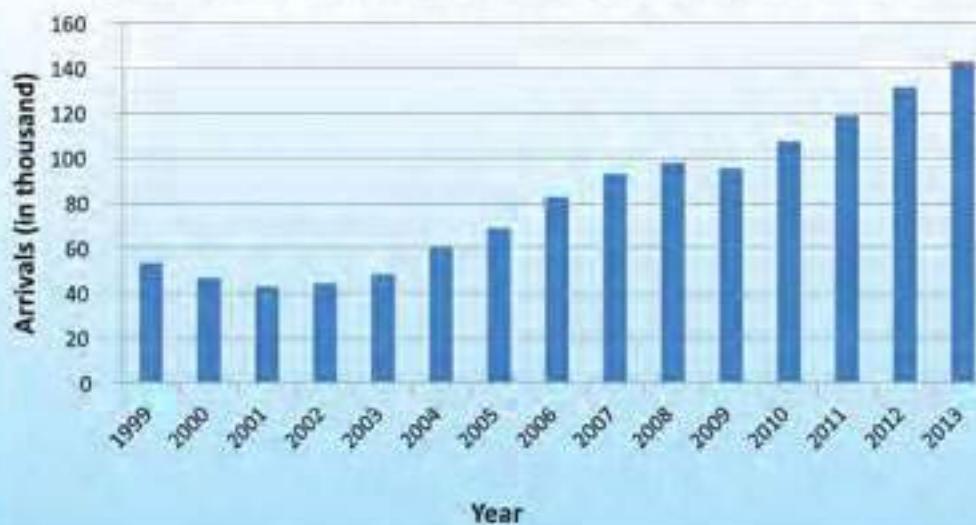


Air travel with 97.6% of the arrivals was the predominant mode of travel from China (Main) during 2013 followed by land routes (1.1%) and sea routes (1.3%). Maximum tourists disembarked at Delhi airport (52.0%), followed by Mumbai (17.5%), Kolkata(9.4%) and Bengaluru (8.4%). The peak quarter for arrivals from China (Main) in 2013 was January-March (29.5%), followed by October-December (27.7%). Of the total arrivals from China (Main) during 2013, majority were male (65.3%). The dominant age group in 2013 was 25-34 years contributing about 39.5% of tourists followed by the age-group 35-44 years (26.8%). During 2013, the maximum tourist from China (Main) came to India for 'Business and Professional' (57.6%) followed by 'Leisure Holidays and Recreation' (27.2%) and 'visiting friends & relatives' (4.2%).

xiii. SINGAPORE

During the year 2013, Singapore occupied thirteenth position among the tourist generating markets in India, with 2.05% share in total arrivals. The arrivals from Singapore grew from 17950 in 1981 to 143025 in 2013 at a CAGR of 6.7%. The following graph shows tourist arrival trend from Singapore from 1999 to 2013.

Foreign Tourist Arrivals in India from Singapore, 1999-2013

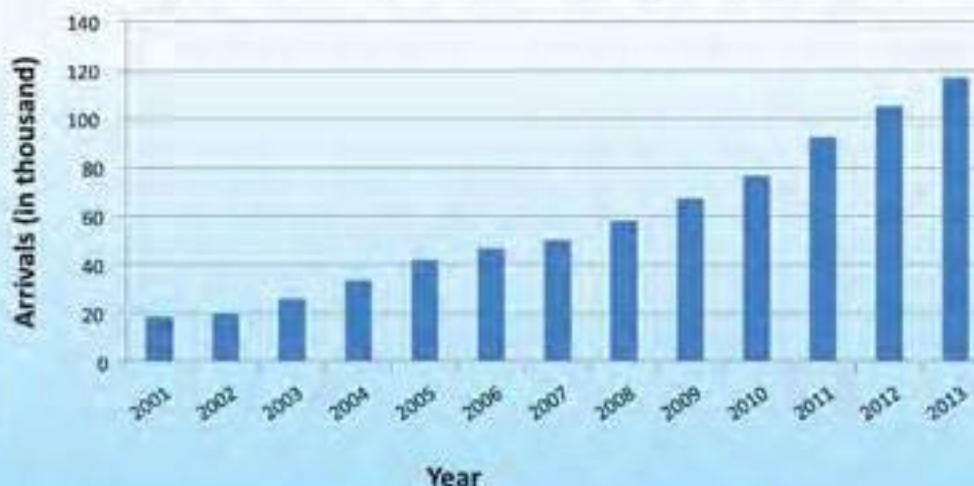


The predominant mode of travel for tourists from Singapore was air, with 99.6% arrivals followed by land route with (0.3%) arrivals. Maximum tourists disembarked at Chennai airport (27.5%) followed by Mumbai (21.3%), Delhi (21.2%) and Bengaluru (7.6%). Of the total arrivals from Singapore during 2013, majority (60.1%) were male. The age-group which dominated the arrivals during 2012 was 45-54 years, accounting for (25.0%) of arrivals, followed by the age-group 35-44 years (24.6%). The peak quarter of arrivals from Singapore during 2013, was October- December (32.2%) followed by January-March (23.5%). During 2013, amongst the tourist from Singapore the highest number came to India for 'Visiting friends & relatives' (36.4%) followed by 'Business and Professional' (26.2%) and 'Leisure, Holiday & Recreation' (25.0%).

xiv. Thailand

In 2013, Thailand the new entrant to the top 15 tourist generating markets occupied fourteenth position with 1.68% share in total arrivals. The arrivals from Thailand grew from 18623 in 2001 to 117136 in 2013 at a CAGR of 16.6%. The following graph shows the trend in tourist arrivals from Thailand during 2001 to 2013.

Foreign Tourist Arrivals in India from Thailand, 2001-2013

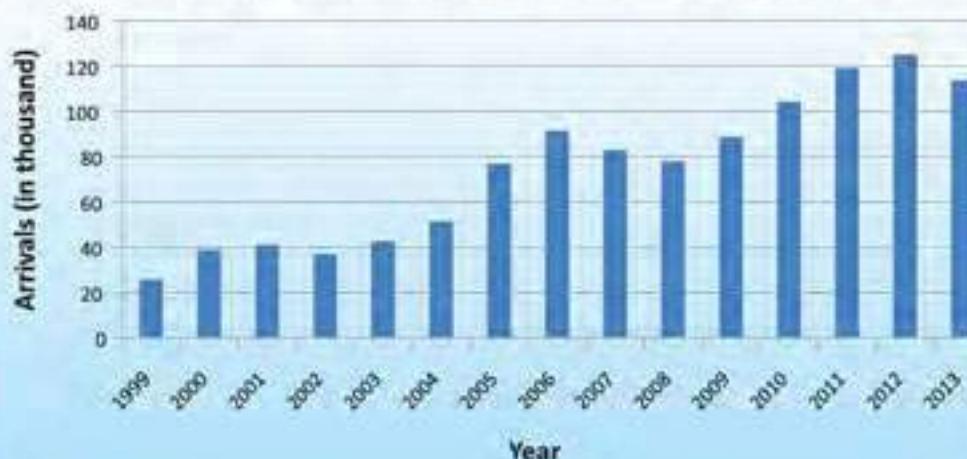


During 2013, 92.3% of the tourists from Thailand came by air, 6.6% by land and 1.1% by Sea. During 2013, the maximum tourists disembarked at Delhi airport (32.9%), followed by Kolkata (27.4%), Mumbai (9.9%), Bengaluru (4.7%), Chennai (3.6%) and Hyderabad (1.0%). During 2013, majority of the arrivals (54.2%) were female. The age-group which dominated the arrivals during 2013 was the age-group 35-44 years (22.5%) followed by 45-54 (21.7%). The peak quarter for arrivals was January-March (34.4%) followed by October-December (34.2%). During 2013, the maximum tourist from Thailand came to India for 'Leisure Holiday and Recreation' (63.3%) followed by Business & Professional' (12.9%) and 'Visiting friends & relatives' (6.1%).

xv. NEPAL

During 2013, Nepal slipped to fifteenth rank from its fourteenth rank in 2012 among top 15 tourist generating markets for India, with 1.63% of the total share of arrivals. The arrivals from Nepal grew from 11851 in 1981 to 113790 in 2013 at a CAGR of 7.3%. The following graph shows the tourist arrivals from Nepal during 1999 to 2013. It can be seen that there is no consistent trend in arrivals from Nepal during the years 1999-2008. The four years from 2009-2012 showed an increasing trend, however, there was a decline in tourist arrivals in 2013.

Foreign Tourist Arrivals in India from Nepal, 1999-2013



The predominant mode of travel for Nepalese tourists was air which accounted for 95.9% followed by land route (4.1%). During 2013, the maximum tourists disembarked at Delhi airport (79.1%), followed by Mumbai (7.5%), Kolkata (5.1%), Bengaluru (0.7%) and Hyderabad (0.2%). During 2013, majority of the arrivals (69.1%) were male. The age-group which dominated the arrivals during 2013 was 25-34 years (30.8%) followed by 15-24 years (21.9%). The peak quarter for arrivals was October-December (28.4%) followed by July-September (26.8%). During 2013, the maximum tourist from Nepal came to India for the purpose Business & Professional' (16.2%) and 'Visiting friends & relatives' (10.1%).

2.10 FOREIGN EXCHANGE EARNINGS FROM TOURISM IN INDIA

For the FEE's, Tourism is the most important sector in the country. As per the monthly estimates prepared by Ministry of Tourism, FEEs from tourism in India in 2013 in ₹ terms were 107671 crore as compared to 94487 in 2012 registering a growth of 14.0 % in 2013 over 2012. In US \$ terms, FEEs from tourism in 2013 were US \$ 18,445 billion as compared to US\$ 17,737 billion in 2012 with a growth rate of 4.0 %. The FEEs from tourism in India, in INR terms and US\$ terms, during 1991-2013 are given in Table 2.10.1.

TABLE 2.10.1
FOREIGN EXCHANGE EARNINGS FROM TOURISM IN INDIA
DURING, 1991-2013

Year	FEE in ₹ terms		FEE in US\$ terms	
	₹ Crore	% Change over previous year	US \$ Million	% Change over previous year
1991	4318	-	1861	-
1992	5951	37.8	2126	14.2
1993	6611	11.1	2124	-0.1
1994	7129	7.8	2272	7.0
1995	8430	18.2	2583	13.7
1996	10046	19.2	2832	9.6
1997	10511	4.6	2889	2.0
1998	12150	15.6	2948	2.0
1999	12951	6.6	3009	2.1
2000	15626	20.6	3460	15.0
2001	15083	-3.5	3198	-7.6
2002	15064	-0.1	3103	-3.0
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	53700	4.5	11136	-3.7
2010#	64889	20.8	14193	27.5
2011#	77591	19.6	16564	16.7
2012#	94487	21.8	17737	7.1
2013#	107671	14.0	18445	4.0

Provisional

The month-wise FEEs from tourism and corresponding percentage change over previous years during 2011-2013 in ₹ terms and US\$ terms are given in Tables 2.10.2 and 2.10.3, respectively.

TABLE 2.10.2
MONTH-WISE FEE FROM TOURISM (₹ CRORE) IN INDIA DURING 2011- 2013

Month	FEE from tourism (in ₹ crore)			Percentage Change	
	2011#	2012#	2013#	2012/11	2013/12
January	5777	8623	10,785	49.3	25.1%
February	7653	8502	10,255	11.1	20.6%
March	5522	7843	9,545	42.0	21.7%
April	5724	6745	7,226	17.8	7.1%
May	5047	5562	6,627	10.2	19.1%
June	5440	6485	7,149	19.2	10.2%
July	7116	8389	8,620	17.9	2.8%
August	5734	7260	8,351	26.6	15.0%
September	5748	6652	7,811	15.7	17.4%
October	7019	8154	8,645	16.2	6.0%
November	7941	9723	10,663	22.4	9.7%
December	8870	10549	11,994	18.9	13.7%
Total	77591	94487	1,07,671	21.8	14.0%

Provisional Estimates

TABLE 2.10.3
MONTH-WISE FEE FROM TOURISM (US\$ BILLION) IN INDIA DURING 2011 -2013

Month	FEE (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%	18.0%
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%

Provisional Estimates



3

Chapter

Atithidevo Bhava



Incredible India

**WORLD TOURISM SCENARIO AND
INDIA'S POSITION IN WORLD**



WORLD TOURISM SCENARIO AND INDIA's POSITION IN WORLD

3.1 WORLD TOURISM TRAFFIC

In 2013, world tourism continued to rebound from the setbacks of 2008-2009, suffered due to the global financial crisis and economic recession. International tourist arrivals worldwide registered a growth of 4.8 % during the year 2013, as compared to a growth of 4.1% during 2012 over 2011. The international tourist arrivals during 2013, 2012 and 2011 were 1087 million, 1037 million and 997 million, respectively. France maintained the top position in terms of arrivals in 2013, followed by USA, Spain, China, Italy, Turkey, Germany, UK, Russia and Thailand. These top 10 countries accounted for 43.6 % share of international tourist arrivals in 2013. As regards the regions, the highest tourist arrivals were in Europe, which attracted 565.0 million tourists in 2013, with a positive growth of 4.8 % over 2012, followed by Asia & the Pacific with 248.7 million tourists with 6.5 % growth over 2012, Americas with 168.3 million tourists with growth of 3.4 % over 2012, Africa with 55.9 million tourists with growth of 5.6 % over 2012 and Middle East with 48.8 million tourists with a decline of 0.6 % over 2012. Table 3.1.1 gives the summary of International Tourist Arrivals in different regions of the world from 2011 to 2013.

TABLE 3.1.1
INTERNATIONAL TOURIST ARRIVALS WORLDWIDE AND BY REGIONS, 2011-2013

Region	2011	2012	2013*
World			
Arrivals	997.0	1037.0	1087.0
% Annual Change	5.1	4.1	4.8
Africa			
Arrivals	49.7	53.0	55.9
% Annual Change	-0.4	6.5	5.6
% Share in world	5.0	5.1	5.1
Americas			
Arrivals	156.1	162.7	168.3
% Annual Change	3.7	4.3	3.4

Region	2011	2012	2013*
% Share in world	15.7	15.7	15.5
Asia & the Pacific			
Arrivals	218.5	233.5	248.7
% Annual Change	6.6	6.9	6.5
% Share in world	21.9	22.5	22.9
Europe			
Arrivals	520.0	539.1	565.0
% Annual Change	6.4	3.7	4.8
% Share in world	52.2	52.0	52.0
Middle East			
Arrivals	52.2	49.0	48.8
% Annual Change	-4.2	-6.1	-0.6
% Share in world	5.2	4.7	4.5
India			
Arrivals	6.31	6.58	6.97
% Annual Change	9.2	4.3	5.9
% Share in world	0.63	0.63	0.64

Note: *:- Provisional

Source: UNWTO World Tourism Barometer, August 2014

International tourist arrivals in the world and India's share as well as rank, during the years 1997-2013, are given in Table 3.1.2. India's rank in international tourist arrivals was 47th in 1998 and declined to 54th in 2002, however, since then, it has gradually improved to 42nd in 2013. India's share in international tourist arrivals, increased from 0.40% in 1997 to 0.64% in 2013.

**TABLE 3.1.2
INTERNATIONAL TOURIST ARRIVALS IN WORLD AND INDIA, 1997-2013**

Year	World		India		Percentage Share of India	Rank of India
	Number (in million)	% Change	Number (in million)	% Change		
1997	593.0	4.2	2.37	3.8	0.40	—
1998	611.0	3.0	2.36	-0.7	0.39	47 th
1999	633.8	3.7	2.48	5.2	0.39	46 th
2000	683.3	7.8	2.65	6.7	0.39	50 th
2001	683.4	0.0	2.54	-4.2	0.37	51 st
2002	703.2	2.9	2.38	-6.0	0.34	54 th
2003	691.0	-1.7	2.73	14.3	0.39	51 st
2004	762.0	10.3	3.46	26.8	0.45	44 th
2005	798.0	4.7	3.92	13.3	0.49	43 rd
2006	846.0	6.0	4.45	13.5	0.53	44 th
2007	894.0	5.7	5.08	14.3	0.57	41 st
2008	917.0	2.6	5.28	4.0	0.58	41 st
2009	883.0	-3.7	5.17	-2.2	0.59	41 st
2010	948.0	7.4	5.78	11.8	0.61	42 nd
2011	997.0	5.1	6.31	9.2	0.63	39 th
2012	1037.0	4.1	6.58	4.3	0.63	41 st
2013	1087.0	4.8	6.97	5.9	0.64	42 nd

Source: World Tourism Organization and Bureau of Immigration, India

Table 3.1.3 provides the name of countries with tourist arrivals and ranks which are above India in terms of tourist arrivals during 2011, 2012 and 2013. Among top 10 countries in respect of tourist arrivals in 2012, 7 countries maintained their respective ranks in 2013 also Some countries like Spain, Thailand, Greece, Macao China, Korea Republic, Singapore, Taiwan, Hungary and Japan have marginally improved their ranks in international tourist

arrivals, during 2013 as compared to 2012. However, countries like Saudi Arabia, Mexico, Canada, Cezh Republic, Egypt, Switzerland, Belgium and Denmark have shown decline in their ranks during 2013 as compared to 2012.

All other countries like Poland, Morocco, Portugal, Ukraine and Hong Kong (China) retained the same ranks in 2013 as compared to 2012. India has loosened its rank from 41st in 2012 to 42nd in 2013.

**TABLE 3.1.3
COUNTRIES ABOVE INDIA IN TERMS OF TOURIST ARRIVALS, 2011-2013**

(Tourist Arrivals in Million)

2011			2012			2013		
Rank	Nationality	Tourist Arrivals	Rank	Nationality	Tourist Arrivals	Rank	Nationality	Tourist Arrivals
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 (Main)	57.6	3	China (Main)	57.7	3	Spain	60.7
4	Spain	56.2	4	Spain	57.5	4	China	55.7
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

2011			2012			2013		
Rank	Nationality	Tourist Arrivals	Rank	Nationality	Tourist Arrivals	Rank	Nationality	Tourist Arrivals
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: UNWTO Barometer August 2014.

NA: Not Available

3.2 INDIA IN OUTBOUND TOURISM OF OTHER COUNTRIES

Table 3.2.1 gives the summary of number of outbound departures and the percentage shares of India in outbound departures of some countries of the world for the year 2011 and 2012. The corresponding figures for 2013 are not yet available. As regards the share of India in the outbound tourist traffic of the countries presented in this table, it was high for the neighboring countries, namely Sri Lanka (23.4%), Nepal (14.5%), Mauritius (10.6%) and Tajikistan (10.4%). Other countries for which India has a share of more than 1% in the outbound tourist traffic in 2012 were Seychelles (4.1%), Fiji (2.1%), Thailand (1.8%), New Zealand (1.8%), USA (1.7%), Singapore (1.6%), UK (1.4%), Belarus (1.3%), Japan (1.2%), and Israel (1.1%). Countries like Georgia, Kyrgyzstan, Colombia, Finland, Saudi Arabia, etc have registered a significant growth in the number of their outbound departures in 2012 over 2011 but India's share out of them has not been very significant.

**TABLE 3.2.1
NUMBER OF OUTBOUND DEPARTURES OF SOME SELECTED COUNTRIES OF THE WORLD
AND PERCENTAGE SHARE OF INDIA, 2011 AND 2012**

S. No.	Country	FTAs in India (in thousand)			No. of Outbound Departures (in thousand)			India's % Share in Outbound Departures	
		2011	2012	% Growth (2012/11)	2011	2012	% Growth (2012/11)	2011	2012
1	2	3	4	5	6	7	8	9	10
1	USA	981	1040	6.0	58497	60723	3.8	1.7	1.7
2	UK	798	788	-1.2	56836	56538	-0.5	1.4	1.4
3	Sri Lanka	306	297	-2.9	1239	1269	2.4	24.7	23.4
4	Canada	259	256	-1.2	30450	32276	6.0	0.9	0.8
5	Germany	240	255	6.2	NA	NA	NA	NA	NA
6	France	231	241	4.2	26155	25450	-2.7	0.9	0.9
7	Japan	194	220	13.4	16994	18491	8.8	1.1	1.2
8	Russian Fed	144	178	23.3	43726	NA	NA	0.3	NA
9	China	142	169	19.0	70250	83183	18.4	0.2	0.2
10	Singapore	119	131	10.5	7753	8048	3.8	1.5	1.6
11	Nepal	119	125	5.4	774	862	11.4	15.4	14.5

S. No.	Country	FTAs in India (in thousand)			No. of Outbound Departures (in thousand)			India's % Share in Outbound Departures	
		2011	2012	% Growth (2012/11)	2011	2012	% Growth (2012/11)	2011	2012
1	2	3	4	5	6	7	8	9	10
12	Korea Rep	109	109	0.4	12694	13737	8.2	0.9	0.8
13	Thailand	92	105	14.3	5397	5721	6.0	1.7	1.8
14	Italy	101	99	-2.2	29295	28810	-1.7	0.3	0.3
15	Netherlands	75	75	-0.3	18560	18628	0.4	0.4	0.4
16	Spain	71	67	-5.6	13347	12185	-8.7	0.5	0.6
17	Sweden	49	51	4.2	14651	15548	6.1	0.3	0.3
18	Maldives	54	50	-6.6	NA	NA	NA	NA	NA
19	South Africa	58	50	-13.5	5455	5031	-7.8	1.1	1.0
20	Oman	41	50	21.4	NA	NA	NA	NA	NA
21	Switzerland	46	48	5.2	10466	12098	15.6	0.4	0.4
22	Israel	48	48	-0.7	4387	4349	-0.9	1.1	1.1
23	Belgium	40	43	6.5	9727	9576	-1.6	0.4	0.4
24	New Zealand	37	39	5.2	2096	2169	3.5	1.8	1.8
25	Austria	36	39	7.2	9874	10960	11.0	0.4	0.4
26	Philippines	31	33	7.5	NA	NA	NA	NA	NA
27	Denmark	35	33	-5.5	7846	7843	0.0	0.4	0.4
28	Saudi Arabia	26	32	23.6	15281	18671	22.2	0.2	0.2
29	Taiwan	26	32	21.7	9584	10240	6.8	0.3	0.3
30	Indonesia	33	30	-10.4	6750	7454	10.4	0.5	0.4
31	Ukraine	23	29	26.2	19773	21433	8.4	0.1	0.1
32	Poland	28	25	-10.6	6300	NA	NA	0.4	NA
33	Mauritius	22	25	13.7	219	237	8.2	10.0	10.6
34	Ireland	22	25	11.6	6514	6600	1.3	0.3	0.4
35	Turkey	17	23	35.2	6282	5803	-7.6	0.3	0.4
36	Finland	24	22	-6.6	7274	9055	24.5	0.3	0.2
37	Brazil	17	18	8.5	7728	8119	5.1	0.2	0.2
38	Kazakhstan	10	12	16.5	7852	8875	13.0	0.1	0.1

S. No.	Country	FTAs in India (in thousand)			No. of Outbound Departures (in thousand)			India's % Share in outbound Departures	
		2011	2012	% Growth (2012/11)	2011	2012	% Growth (2012/11)	2011	2012
1	2	3	4	5	6	7	8	9	10
39	Mexico	11	11	2.3	14799	15581	5.3	0.1	0.1
40	Czech Rep	11	11	1.2	5912	5978	1.1	0.2	0.2
41	Egypt	9	11	17.5	4863	4141	-14.8	0.2	0.3
42	Argentina	9	10	9.2	6686	7247	8.1	0.1	0.1
43	Uzbekistan	7	10	40.1	NA	NA	NA	NA	NA
44	Greece	7	7	7.0	4942	4681	-5.3	0.1	0.2
45	Jordan	5	7	47.1	1931	1567	-18.9	0.3	0.5
46	Hungary	7	7	-7.0	5335	4881	-8.5	0.1	0.1
47	Romania	6	6	5.6	10936	11149	1.9	0.1	0.1
48	Belarus	5	6	24.8	320	493	54.1	1.6	1.3
49	Chile	4	5	16.0	2638	2837	7.5	0.2	0.2
50	Colombia	4	4	9.5	2522	3165	25.5	0.2	0.1
51	Slovakia	4	4	2.6	3285	2689	-18.1	0.1	0.2
52	Syria Arab Rep	4	4	-0.7	NA	NA	NA	NA	NA
53	Uganda	4	4	-4.0	367	382	4.1	1.1	1.0
54	Bulgaria	3	4	20.7	3803	3758	-1.2	0.1	0.1
55	Lithunia	4	3	-14.8	1526	1708	11.9	0.3	0.2
56	Morocco	2	3	60.2	2392	2316	-3.2	0.1	0.1
57	Croatia	3	3	5.3	2880	2680	-6.9	0.1	0.1
58	Latvia	3	3	1.0	1530	NA	NA	0.2	NA
59	Estonia	3	3	-3.2	1054	1147	8.8	0.3	0.3
60	Slovenia	3	3	-6.9	2722	2474	-9.1	0.1	0.1
61	Fiji	3	3	-6.9	132	132	0.0	2.3	2.1
62	Zimbabwe	2	3	34.1	693	NA	NA	0.3	NA
63	Tunisia	2	3	29.8	2303	NA	NA	0.1	NA
64	Seychelles	2	2	11.0	57	54	-5.3	3.5	4.1
65	Venezuela	2	2	6.9	1719	2018	17.4	0.1	0.1
66	Cambodia	2	2	1.4	710	792	11.5	0.3	0.3
67	Peru	2	2	-3.4	2132	2296	7.7	0.1	0.1
68	Algeria	2	2	-12.5	1715	1911	11.4	0.1	0.1
69	Hong Kong	2	2	-12.9	84816	85276	0.5	0.0	0.0

S. No.	Country	FTAs in India (in thousand)			No. of Outbound Departures (in thousand)			India's % Share in Outbound Departures	
		2011	2012	% Growth (2012/11)	2011	2012	% Growth (2012/11)	2011	2012
1	2	3	4	5	6	7	8	9	10
70	Iceland	3	2	-44.2	341	358	5.0	0.9	0.5
71	Swaziland	1	2	62.8	1264	1403	11.0	0.1	0.1
72	Tajikistan	1	2	56.4	NA	15	NA	NA	10.4
73	Kyrgyzstan	1	1	34.8	931	132	42.4	0.1	0.1
74	Azerbaijan	1	1	26.3	2308	282	22.5	0.0	0.0
75	Uruguay	1	1	24.9	1534	181	18.4	0.1	0.1
76	Georgia	4	1	-74.3	2237	495	121.4	0.2	0.0
77	Ecuador	0	1	NA	1022	102	0.1	0.0	0.1
78	Panama	0	1	NA	414	447	8.0	0.0	0.2
79	Cyprus	1	1	-10.5	1026	NA	NA	0.1	NA
80	Costa Rica	1	1	-23.7	717	773	7.8	0.1	0.1
81	Malta	1	1	-38.6	348	368	5.7	0.3	0.2
82	Armenia	1	1	-40.5	715	807	12.9	0.1	0.1
83	Rep. Of Moldova	0	1	NA	136	147	8.1	0.0	0.4
84	Guatemala	0	1	NA	770	793	3.0	0.0	0.1

Source: For Columns 6 and 7, UNWTO's Compendium of Tourism Statistics 2014 Edition for Columns 3 and 4, Bureau of Immigration,
Govt. of India

NA : Not available

3.3 INTERNATIONAL TOURISM RECEIPTS

Table 3.3.1 gives the year-wise receipts from international tourism by regions during the years 2011-2013. During the year 2013, Europe accounted for about (41.0%) of the world's total receipts from international tourism followed by Asia & the Pacific region (30.1%), Americas (22.1%), Middle East (3.9%) and Africa (2.9%).

**TABLE 3.3.1
INTERNATIONAL TOURISM RECEIPTS WORLDWIDE AND BY REGIONS,
2011- 2013**

(Receipts in Billion US\$)

Region	2011	2012	2013
World			
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

#Advance estimates of Ministry of Tourism

Source: UNWTO World Tourism Barometer April 2014 for 2011 &

UNWTO World Tourism Barometer, August 2014 for 2012& 2013

The international tourism receipts worldwide and India's share in them during the years 1997-2013 are given in Table 3.3.2. The share of India in the world tourism receipts remained between 0.65% and 0.73% during 1997-2000. However, it has been increasing steadily since 2002, and has reached 1.54% during 2013.

Table 3.3.2 depicts that international tourism receipts worldwide, which were hardly US\$ 442.8 billion in 1997, have reached US\$ 1195 billion in 2013, more than double in 15 years time. Whereas, in terms of international tourist arrivals worldwide, the number has grown from 593 million in 1997 to 1087 million tourist arrivals in 2013 only.

**TABLE 3.3.2
INTERNATIONAL TOURISM RECEIPTS AND INDIA's SHARE AND RANK, 1997-2013**

Year	World Tourism Receipts				Percentage Share of India in world	India's Rank in world
	Receipts (US\$ billion)	Growth Rate	FEE in India (US\$ billion)	Growth Rate		
1997	442.8	0.8	2.89	2.0	0.65	-
1998	444.8	0.5	2.95	2.0	0.66	34 th
1999	458.2	3.0	3.01	2.1	0.66	35 th

2000	475.3	3.7	3.46	15.0	0.73	36 th
2001	463.8	-2.4	3.20	-7.6	0.69	36 th
2002	481.9	3.9	3.10	-3.0	0.64	37 th
2003	529.3	9.8	4.46	43.8	0.84	37 th
2004	633.2	19.6	6.17	38.2	0.97	26 th
2005	679.6	7.3	7.49	21.4	1.10	22 nd
2006	744.0	9.5	8.63	15.2	1.16	22 nd
2007	857.0	15.2	10.73	24.3	1.25	22 nd
2008	939.0	9.6	11.83	10.3	1.26	22 nd
2009	853.0	-9.2	11.13	-5.9	1.31	20 th
2010	931.0	9.1	14.19#	27.5	1.52	18 th
2011	1042.0	12.0	16.56#	16.7	1.59	18 th
2012	1115.0	7.0	17.74#	7.1	1.59	16 th
2013	1195.0	7.2	18.44#	4.0	1.54	16 th

Advance estimates of Ministry of Tourism

Source : UNWTO World Tourism Barometer April 2014 for 2010 & 2011

UNWTO World Tourism Barometer, August 2014 for 2012& 2013

India's rank has also witnessed improvement from 34th in 1998 to 16th in 2013. Table 3.3.3 shows that, in terms of International Tourism Receipts, top 5 positions were occupied by USA, Spain, France, China and Macao (China) during the year 2013. During 2013 and 2012 the top 10 countries remained the same, although their inter se ranks varied.

TABLE 3.3.3
COUNTRIES 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

2011			2012			2013		
Rank	Nationality	Tourism Receipts (US\$ billion)	Rank	Nationality	Tourism Receipts (US\$ billion)	Rank	Nationality	Tourism Receipts (US\$ billion)
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	Thailand	33.8	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			17		
18	India	16.6**	18			18		

Source: UNWTO Barometer August 2014 for 2012 & 2013

** As per RBI's estimates



4

Chapter

Atithidevo Bhava



Incredible India

**OUTBOUND TOURISM- INDIAN NATIONALS'
DEPARTURES FROM INDIA**



OUTBOUND TOURISM-INDIAN NATIONALS' DEPARTURES FROM INDIA

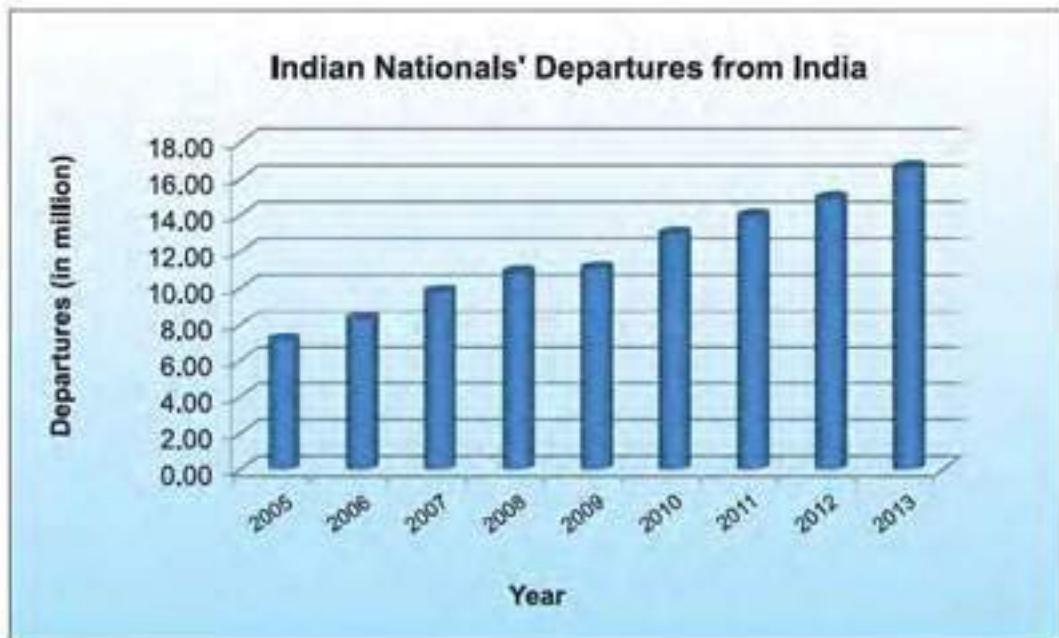
The number of Indian nationals' departures from India during 1991 was 1.94 million which rose to 16.63 million in 2013 with a compound annual growth rate (CAGR) of 10.3%. The number of Indian nationals' departures from India during 2013 registered a growth of 11.4% over 2012 as compared to 6.7% growth in 2012 over 2011. The figures of Indian nationals' departures for the years 1991 to 2013, as compiled by the Bureau of Immigration (BOI) from Embarkation cards, along with percentage change over the previous year, are given in Table 4.1.

**TABLE 4.1
NUMBER OF INDIAN NATIONALS' DEPARTURES FROM INDIA, 1991 TO 2013**

Year	No. of Indian Nationals' Departures from India	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

Year	No. of Indian Nationals' Departures from India	Percentage change over the previous year
2009	11066072	1.8
2010	12988001	17.4
2011	13994002	7.7
2012	14924755	6.7
2013	16626316	11.4

Source: Bureau of Immigration, India



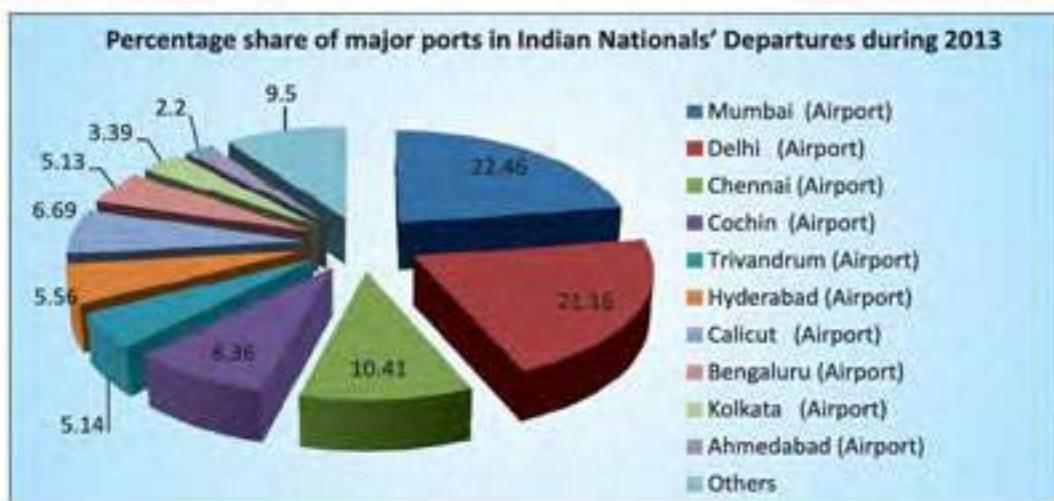
The port-wise number of Indian national's departures from India for 2006 to 2013, are given in Table 4.2. During 2006 to 2013, top 3 airports for departures of Indian nationals from India were Mumbai, Delhi and Chennai. During 2013, Mumbai airport registered the highest share (22.46%) followed by Delhi airport (21.16%) and Chennai airport (10.41%). These 3 top airports accounted for 54.03% of the total departures in 2013. During 2012, Mumbai, Delhi and Chennai airports had a percentage share of 23.46%, 21.62% and 10.86%, respectively. It can be seen that during 2006 the total share of these 3 airports was 62.02% and the same has been gradually decreasing.

The share of Top 10 ports in overall departures of Indian nationals from India during 2006-2013 has also gradually decreased from 94.15% in 2006 to 90.50% in 2013. This decline may be due to various reasons including introduction of international flights from other airports.

TABLE 4. 2
PORT-WISE OF INDIAN NATIONALS' DEPARTURES FROM INDIA, 2006 - 2013

Port/ Land Check post	Year								% Share in 2013
	2006	2007	2008	2009	2010	2011	2012	2013	
Mumbai (Airport)	2368115	2623707	2734458	2615702	3031822	3264653	3501739	3734176	22.46
Delhi (Airport)	1764264	1956299	2141600	2117561	2621535	3009762	3226344	3517589	21.16
Chennai (Airport)	1039973	1211400	1350418	1312197	1450521	1540106	1620314	1730503	10.41
Cochin (Airport)	591236	773310	915278	968375	1022233	1098333	1205315	1390833	8.36
Trivandrum (Airport)	474309	578647	619856	642011	751861	677998	739698	854564	5.14
Hyderabad (Airport)	461616	494797	482897	543719	740350	777540	810903	925401	5.56
Calicut (Airport)	454606	526290	735151	791021	904130	970961	986463	1112297	6.69
Bangaluru (Airport)	369508	491088	530054	577191	664083	746051	810108	852591	5.13
Kolkata (Airport)	232219	286953	294644	307379	411210	453682	502802	562907	3.39
Ahmedabad (Airport)	95714	170458	225479	262734	296778	275981	286707	366102	2.2
Others	488054	670283	838164	928182	1093478	1178935	1234362	1579353	9.5
Total	8339614	9783232	10867999	11066072	12988001	13994002	14924755	16626316	100
Top 3	62.09%	59.20%	57.30%	54.63%	56.23%	55.84%	55.94%	54.03%	
Top 10	94.15%	93.15%	92.29%	91.61%	91.58%	91.59%	91.73%	90.50%	

Source: Bureau of Immigration, India



The month-wise distribution of Indian Nationals' Departures from India during 2011, 2012 and 2013 are given in Table 4.3. The number of Indian Nationals' Departures was highest in the month of August. The highest growth (30.9%) was registered in August 2013 over August 2012 where as May 2013 registered a decline of 16.8% over May 2012.

TABLE 4.3
MONTH-WISE NUMBER & PERCENTAGE SHARE OF INDIAN NATIONALS' DEPARTURES FROM INDIA 2011-2013

Month	Indian Nationals Departures(Nos.)			Growth Rate		Percentage Share		
	2011	2012	2013	2012/11	2013/12	2011	2012	2013
January	1201380	1252675	1424291	4.3	13.7	8.58	8.39	8.57
February	995053	1131258	1285813	13.7	13.7	7.11	7.58	7.73
March	1081640	1181781	1287728	9.3	9.0	7.73	7.92	7.75
April	1175536	1292182	1395879	9.9	8.0	8.40	8.66	8.40
May	1328969	1462059	1215906	10.0	-16.8	9.50	9.80	7.31
June	1214111	1280517	1320766	3.8	4.8	8.68	8.45	7.94
July	1160874	1150203	1415677	-0.9	23.1	8.30	7.71	8.51
August	1120198	1217085	1593409	8.6	30.9	8.00	8.15	9.58
September	1302092	1368563	1464118	5.1	7.0	9.30	9.17	8.81
October	1188871	1181874	1218333	-0.6	3.1	8.50	7.92	7.33
November	1077513	1164414	1438279	8.1	23.5	7.70	7.80	8.65
December	1147765	1262144	1566117	10.0	24.1	8.20	8.46	9.42
Total	13994002	14924755	16626316	6.7	11.4	100.00	100.00	100.00

Source: Bureau of Immigration

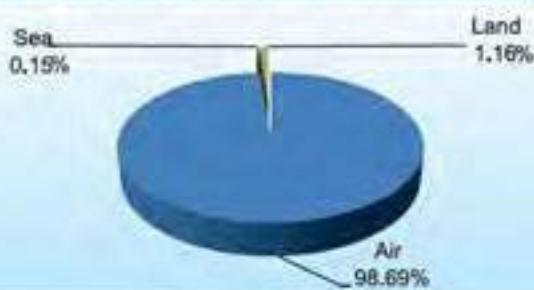
The Mode-wise distribution of Indian Nationals Departures from India during 2013 are given in Table 4.4.

TABLE 4.4

Mode wise distribution of Indian Nationals' Departures (INDs) from India during 2013		
Mode of Transport	Departure	% share
Air Routes	16408511	98.69
Sea Routes	24939	0.15
Land Routes	192866	1.16
Total	16626316	100.00

Source: Bureau of Immigration

Mode-wise distribution of Indian Nationals' Departures



As the information about the destination-wise Indian nationals' departures is currently not available from Bureau of Immigration, the same for the last ten years has been taken from UNWTO publications and is presented in Table 4.5. Among the countries for which information were available during 2012, the top 5 destination countries for Indian nationals were Saudi Arabia, Thailand Singapore, Kuwait, and USA. In 2011, the top 4 destination countries were the same as these in 2012, with Malaysia being replaced by USA at 5th position in 2012.

TABLE 4. 5
DESTINATION-WISE NUMBER OF INDIAN NATIONALS' DEPARTURES FROM INDIA,
2006-2012

S.No.	Country of Destination	Number of Indian Nationals' Departures from India						
		2006	2007	2008	2009	2010	2011	2012
	North America							
1	Canada	87210	101724	110890	107959	127619	139213	146652
2	USA	406845	567045	598971	549474	650935	663465	724433
	Central & South America							
3	Bahamas	443	506	605	435	561	398	596
4	Barbados	629	3090	963	959	1317	1230	758
5	Brazil	N.A.	N.A.	19456	11361	181829	21530	22096
6	Cambodia	8690	11454	12467	12461	13542	15240	18999
7	Cayman Islands	140	141	190	171	157	149	161
8	Colombia	1549	1911	2038	2483	2533	2516	2899
9	Chile	3499	3505	3376	2673	2612	2671	2871
10	Cuba	3437	1898	2730	2551	3614	3574	3480
11	Dominican Rep.	279	663	754	806	848	964	941
12	Ecuador	613	795	1212	1570	2060	3073	3769
13	Honduras	343	198	231	295	304	479	852
14	Jamaica	586	1525	904	1232	1127	1330	1375
15	Nicaragua	751	245	1552	513	1935	1410	562
16	Peru	1462	2059	3033	3390	3526	3471	4165
17	Paraguay	187	345	300	258	177	281	398
18	Suriname	326	484	551	454	556	585	504
19	Trinidad & Tobago	2199	2656	1990	1653	1344	N.A.	N.A.
20	Venezuela	1287	845	858	1131	224	809	870
	Western Europe							
21	Belgium	21683	33504	53951	34711	40447	42709	41297
22	Finland	8000	18000	32000	23000	25000	N.A.	N.A.
23	Italy	116951	108941	135517	139094	182552	188408	251361
24	Portugal	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.
25	Switzerland	115055	132396	132107	136322	165999	200624	217863
26	UK	366745	335892	359237	272754	371000	356000	339400
	Eastern Europe							
27	Armenia	2340	2590	3970	4100	4180	4311	4881
28	Azerbaijan	1969	2110	4236	3721	3755	3715	5048
29	Belarus	105	229	221	154	73	97	18
30	Bulgaria	3187	3701	4605	4106	3696	3849	4722
31	Georgia	3088	2355	2712	3674	5653	4578	6833
32	Hungary	6903	8154	N.A.	N.A.	N.A.	N.A.	N.A.
33	Kazakhstan	7197	9280	9022	N.A.	11904	13778	14716
34	Kyrgyzstan	1030	1277	1038	N.A.	1788	2029	2801
35	Latvia	1450	1017	4329	3737	7147	7790	N.A.
36	Moldova, Rep. of	6	21	4	5	2	6	12
37	Poland	9893	13449	15000	10000	15000	15000	15000

S.No.	Country of Destination	Number of Indian Nationals' Departures from India						
		2006	2007	2008	2009	2010	2011	2012
38	Russia	45795	68044	62163	N.A.	53364	N.A.	N.A.
39	Romania	6632	8088	9364	6662	8861	9040	9964
40	Slovakia	443	1229	1380	1290	1495	2537	2892
41	Tajikistan	N.A.	N.A.	495	227	254	121	128
42	Turkmenistan	1	8	N.A.	N.A.	N.A.	N.A.	N.A.
43	Ukraine	6821	7370	7262	8183	10152	9254	10264
Africa								
44	Angola	1852	3768	5262	9517	8831	12741	9231
45	Benin	1225	898	634	212	707	1037	900
46	Botswana	2505	1710	N.A.	N.A.	95	N.A.	N.A.
47	Egypt	61301	82481	88811	86698	114248	73443	82698
48	Eritrea	2895	2973	395	718	730	577	N.A.
49	Ethiopia	7975	8895	10560	N.A.	14607	19667	19211
50	Guinea	20769	320	N.A.	N.A.	N.A.	N.A.	N.A.
51	Lesotho	318	304	404	256	285	261	212
52	Mauritius	37498	42974	43911	39252	49779	53955	55197
53	Morocco	4950	6306	6363	6995	7936	7640	9343
54	Nigeria	28741	49351	54835	57028	57229	202200	181144
55	Rwanda	N.A.	16721	17111	13085	16178	12347	14947
56	Reunion	N.A.	418	N.A.	N.A.	N.A.	N.A.	N.A.
57	Seychelles	1132	1110	1241	1616	2671	2380	2546
58	South Africa	49674	57999	59186	70169	71587	90367	106774
59	Swaziland	3071	3449	3252	4339	3970	4103	3972
60	Sierra Leone	N.A.	N.A.	N.A.	N.A.	1014	1148	2182
61	Tanzania, United Republic of	13020	14042	17530	17002	19101	17731	22862
62	Uganda	11829	12408	16236	13022	16747	19419	24849
63	Zambia	12658	12432	13934	12932	21414	22095	15333
64	Zimbabwe	3316	3990	3911	5446	3571	3499	1809
West Asia								
65	Bahrain	590198	718415	N.A.	N.A.	N.A.	837514	N.A.
66	Israel	20233	24091	29413	23058	40109	38481	42992
67	Iraq	N.A.	N.A.	6031	13876	13680	N.A.	N.A.
68	Jordan	28640	34610	41962	34061	51461	64971	60913
69	Kuwait	560951	653392	673671	733117	751059	789694	826526
70	Lebanon	10079	8242	10668	13946	16117	15378	13513
71	Oman	116166	153041	156723	162832	169799	198543	N.A.
72	Syria	9830	11490	14619	20984	31056	30343	N.A.
73	Saudi Arabia	345431	613347	601922	247075	389116	1501308	998779
74	Turkey	35379	45175	55798	55114	63406	73731	90934
75	United Arab Emirates	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.	N.A.

S.No.	Country of Destination	Number of Indian Nationals' Departures from India						
		2006	2007	2008	2009	2010	2011	2012
76	Yemen	14522	14667	13867	19608	26112	13251	16407
South Asia								
77	Bangladesh	60516	78568	N.A.	N.A.	N.A.	N.A.	N.A.
78	Iran	N.A.	N.A.	N.A.	22277	23903	34770	54263
79	Maldives	12071	17327	16663	15850	25756	30978	31721
80	Nepal	88857	88284	84073	91994	108077	147037	165139
81	Pakistan	70174	48242	54101	42694	43751	84074	77232
82	Sri Lanka	128370	106067	85238	83634	126882	171374	176340
South East Asia								
83	Brunei	N.A.	3402	3540	2879	4904	4616	5104
84	Cambodia	8690	11454	12467	12461	13542	15240	18999
85	Indonesia	94258	123465	155391	156545	159373	181791	196983
86	Lao Peo. Democratic Rep.	2100	2361	2652	2280	3321	3227	3275
87	Malaysia	279046	422452	550738	589838	690849	693056	691271
88	Myanmar	7540	7675	7173	8609	9849	12318	16868
89	Philippines	22703	27341	31135	32817	34581	42844	46395
90	Singapore	658902	748728	778303	725624	828994	868991	894993
91	Thailand	429732	506237	497022	596529	746214	891748	985883
92	Timor-Leste	152	202	400	1464	2027	1451	862
East Asia								
93	China (Main)	405091	462450	436625	448942	549321	606474	610194
94	Hong Kong (China)	294079	317510	350674	366646	530910	498063	414158
95	Japan	62505	67583	67323	58918	66819	59354	68914
96	Macau (China)	28903	45473	82369	107513	169096	169660	150825
97	Mongolia	672	784	893	952	940	1478	1340
98	Korea, Republic of	62531	68276	73130	72779	86547	92047	91700
99	Taiwan (China)	18020	19954	19951	18532	23826	23927	23251
Australasia								
100	Australia	83771	95214	116001	124888	138705	148191	159279
101	French Polynesia	116	224	246	289	318	432	460
102	New Zealand	20265	21853	23860	25336	29486	28262	29856
103	Papua New Guinea	1002	1940	2284	N.A.	2750	4950	N.A.
104	Tonga	N.A.	N.A.	N.A.	N.A.	N.A.	33	31

N.A.: Not Available

Source: Yearbook of Tourism Statistics 2012 Edition, UNWTO

5

Chapter

Atithidevo Bhava



Incredible India

DOMESTIC TOURISM



DOMESTIC TOURISM

Ministry of Tourism compiles the number of Domestic and Foreign Tourist Visits to different States and Union Territories (UTs) based on the information received from them. The compilation of domestic tourism statistics is undertaken by the Statistical Cells in the Departments of Tourism of State Governments /UT Administrations. These statistics are generally based on the monthly returns collected from hotels and other accommodation establishments. Most of the States/UTs have been furnishing information on domestic and foreign tourist visits in the States/UTs, on monthly basis.

The Ministry of Tourism in recent years has commissioned State Tourism Surveys in some States to ascertain the number of tourist visits to these states. The data obtained from the State Tourism Surveys and other administrative sources like Bureau of Immigration have also been appropriately used to estimate domestic and foreign tourist visits to the States, wherever required.

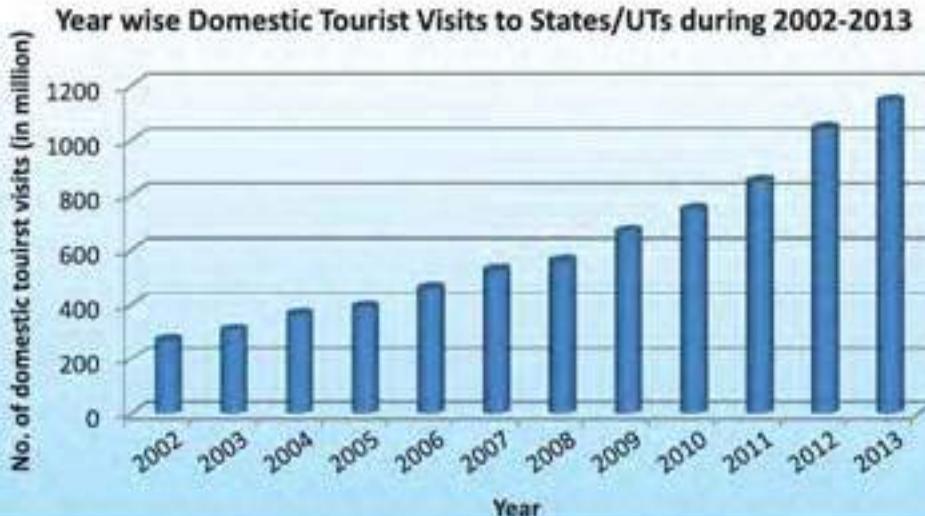
5.1. DOMESTIC AND FOREIGN TOURIST VISITS DURING, 1991-2013

Table 5.1.1 presents the statistics on domestic and foreign tourist visits to various States and UTs during the years 1991 to 2013. There has been a continuous increase in domestic tourist visits, with the compound annual growth rate (CAGR) of domestic tourist visits to all States/UTs from 1991 to 2013 being 13.80%. The foreign tourist visits too have been increasing over the years, though there was a decline in the years 1992, 1998, 2001, 2002, 2009 and 2012. The foreign tourist visits to all States/UTs during 1991 to 2013 witnessed a CAGR of 8.76%. The year 2013 witnessed a growth of 9.59% in domestic tourist visits over the year 2012. During 2013, the visits by foreign tourists registered a growth of 9.24% over 2012.

TABLE 5.1.1
DOMESTIC & FOREIGN TOURIST VISITS TO
STATES / UTs, 1991 - 2013

Year	Tourist Visits		Annual Growth Rate	
	Domestic	Foreign	Domestic	Foreign
1991	66670303	3146652	-	-
1992	81455861	3095160	22.2%	1.6%
1993	105811696	3541727	29.9%	14.4%
1994	127118655	4030216	20.1%	13.8%
1995	136643600	4641279	7.5%	15.2%
1996	140119672	5030342	2.5%	8.4%
1997	159877208	5500419	14.1%	9.3%
1998	168196000	5539704	5.2%	0.7%
1999	190671034	5832015	13.4%	5.3%
2000	220106911	5893542	15.4%	1.1%
2001	236469599	5436261	7.4%	7.8%
2002	269598028	5157518	14.0%	5.1%
2003	309038335	6708479	14.6%	30.1%
2004	366267522	8360278	18.5%	24.6%
2005	392014270	9947524	7.0%	19.0%
2006	462321054	11738892	17.9%	18.0%
2007	526564478	13256637	13.9%	12.9%
2008	563034107	14380633	6.9%	8.5%
2009	668800482	14372300	18.8%	0.1%
2010	747703380	17910178	11.8%	24.6%
2011	884532718	19497126	15.6%	8.9%
2012	1045047536	18263074	20.9%	6.3%
2013	1145280443	19951026	9.6%	9.2%

Following Graph pictorially depicts the trend in the growth of the domestic tourist visits in the country.



From the following graph, it emerges out that numbers of foreign tourist visits to States/UTs during last 12 years have been registering an increasing trend, except for marginal decline in foreign tourist visits in the years 2009 and 2012.

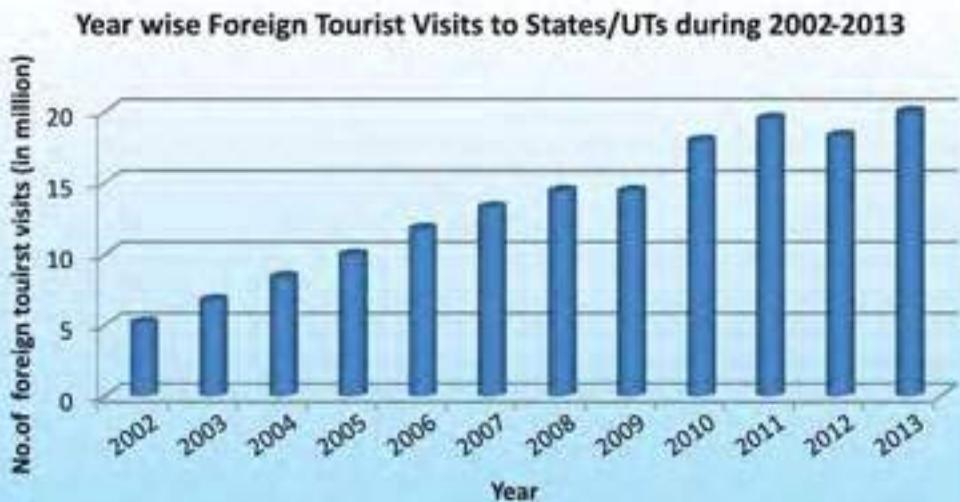


Table 5.1.2 gives the number of domestic and foreign tourist visits to different States/UTs during the years 2012 and 2013. It may be seen from this Table that most of the States/UTs have generally undergone increase in the number of domestic and foreign tourist visits, during 2013. The States/UTs which recorded decline in domestic tourist visits in 2013 over 2012 were Andhra Pradesh, Arunachal Pradesh, Himachal Pradesh, Mizoram, Nagaland, Tripura and Uttrakhand. The States / UTs which experienced decline in foreign tourist visits during 2013 over 2012 were Andaman & Nicobar Island, Andhra Pradesh, Bihar, Chhattisgarh, Delhi, Haryana, Himachal Pradesh, Jammu & Kashmir, Lakshadweep, Puducherry, Rajasthan and Uttarakhand.

TABLE 5.1.2

STATE / UT-WISE DOMESTIC AND FOREIGN TOURIST VISITS, 2012 AND 2013

S. No.	State/ UT	2012		2013		Growth Rate	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
1	Andaman & Nico. Islands	238699	17538	243703	14742	2.10	-15.94
2	Andhra Pradesh \$	207217952	292822	152102150	223518	-26.60	-23.67
3	Arunachal Pradesh \$	132243	5135	125461	10846	-5.13	111.22
4	Assam	4511407	17543	4684527	17638	3.84	0.54
5	Bihar	21447099	1096933	21588306	765835	0.66	-30.18
6	Chandigarh	924589	34130	936922	40124	1.33	17.56
7	Chhattisgarh	15036530	4172	22801031	3886	51.64	-6.86
8	Dadra & Nagar Haveli	469213	1234	481618	1582	2.64	28.20
9	Daman & Diu	803963	4607	819947	4814	1.99	4.49
10	Delhi * #	18495139	2345980	20215187	2301395	9.30	-1.90
11	Goa	2337499	450530	2629151	492322	12.48	9.28
12	Gujarat	24379023	174150	27412517	198773	12.44	14.14
13	Haryana	6799242	233002	7128027	228200	4.84	-2.06
14	Himachal Pradesh	15646048	500284	14715586	414249	-5.95	-17.20
15	Jammu & Kashmir	12427122	78802	13642402	60845	9.78	-22.79
16	Jharkhand	20421016	31909	20511160	45995	0.44	44.14

S. No.	State/ UT	2012		2013		Growth Rate	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
17	Karnataka	94052729	595359	98010140	636378	4.21	6.89
18	Kerala	10076854	793696	10857811	858143	7.75	8.12
19	Lakshadweep	4417	580	4784	371	8.31	-36.03
20	Madhya Pradesh	53197209	275930	63110709	280333	18.64	1.60
21	Maharashtra* \$	74816051	2651889	82700556	4156343	10.54	56.73
22	Manipur	134541	749	140673	1908	4.56	154.74
23	Meghalaya	680254	5313	691269	6773	1.62	27.48
24	Mizoram	64249	744	63377	800	-1.36	7.53
25	Nagaland	35915	2489	35638	3304	-0.77	32.74
26	Odisha	9052871	64719	9800135	66675	8.25	3.02
27	Puducherry	981714	52931	1000277	42624	1.89	-19.47
28	Punjab	19056143	143805	21340888	204074	11.99	41.91
29	Rajasthan	28611831	1451370	30298150	1437162	5.89	-0.98
30	Sikkim	558538	26489	576749	31698	3.26	19.66
31	Tamil Nadu	184136840	3561740	244232487	3990490	32.64	12.04
32	Tripura	361786	7840	359586	11853	-0.61	51.19
33	Uttar Pradesh	168381276	1994495	226531091	2054420	34.53	3.00
34	Uttarakhand	26827329	124555	19941128	97683	-25.67	-21.57
35	West Bengal	22730205	1219610	25547300	1245230	12.39	2.10
	Total	1045047536	18263074	1145280443	19951026	9.59	9.24

Source: State/Union Territory Tourism Departments.

Note:(i)*DTV & FTV data: Estimated using partial data provided by the state Governments.

(ii)*# DTV- Estimated using All India growth rate, FTV: FTA data at Delhi Port.

(iii)\$ DTVs and FTVs figures of 2012 have been revised.

Table 5.1.3 provides the percentage shares and ranks of various States/UTs in domestic and foreign tourist visits during 2013. The top 5 States in domestic tourist visits in 2013 were Tamil Nadu (244.2 million), Uttar Pradesh (226.5 million), Andhra Pradesh (152.1 million), Karnataka (98.0 million) and Maharashtra (82.7 million) with their respective shares being 21.33%, 19.78%, 13.28%, 8.56% and 7.22%. These 5 States accounted for about 70.17% of the total domestic tourist visits in the country. In respect of foreign tourist visits in 2013, the top 5 States/UTs were Maharashtra (4.16 million), Tamil Nadu (3.99 million), Delhi (2.30 million), Uttar Pradesh (2.05 million) and Rajasthan (1.44 million) with their respective shares being 20.83%, 20.00%, 11.54%, 10.30% and 7.20% These 5 States/UTs accounted for about 69.87% of the total foreign tourist visits to the States/UTs in the country.

TABLE: 5.1.3

**PERCENTAGE SHARES AND RANK OF DIFFERENT STATES/UTs IN DOMESTIC
AND FOREIGN TOURIST VISITS DURING, 2013**

S. No.	State/ UT	Tourist Visits (Numbers)		Percentage Share		Rank 2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
1	Andaman & Nico. Islands	243703	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	0.20	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	1.00	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	0.30	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	4.30	18	7
19	Lakshadweep	4784	371	0.00	0.00	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	0.01	0.01	31	32
23	Meghalaya	691269	6773	0.06	0.03	26	28
24	Mizoram	63377	800	0.01	0.00	33	34
25	Nagaland	35638	3304	0.00	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	7.20	7	5
30	Sikkim	576749	31698	0.05	0.16	27	23
31	Tamil Nadu	244232487	3990490	21.34	20.00	1	2
32	Tripura	359586	11853	0.03	0.06	29	26

S. No.	State/ UT	Tourist Visits (Numbers)		Percentage Share		Rank 2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
33	Uttar Pradesh	226531091	2054420	19.78	10.30	2	4
34	Uttarakhand	19941128	97683	1.74	0.49	15	17
35	West Bengal	25547300	1245230	2.23	6.24	9	6
	Total	1145280443	19951026	100.00	100.00		

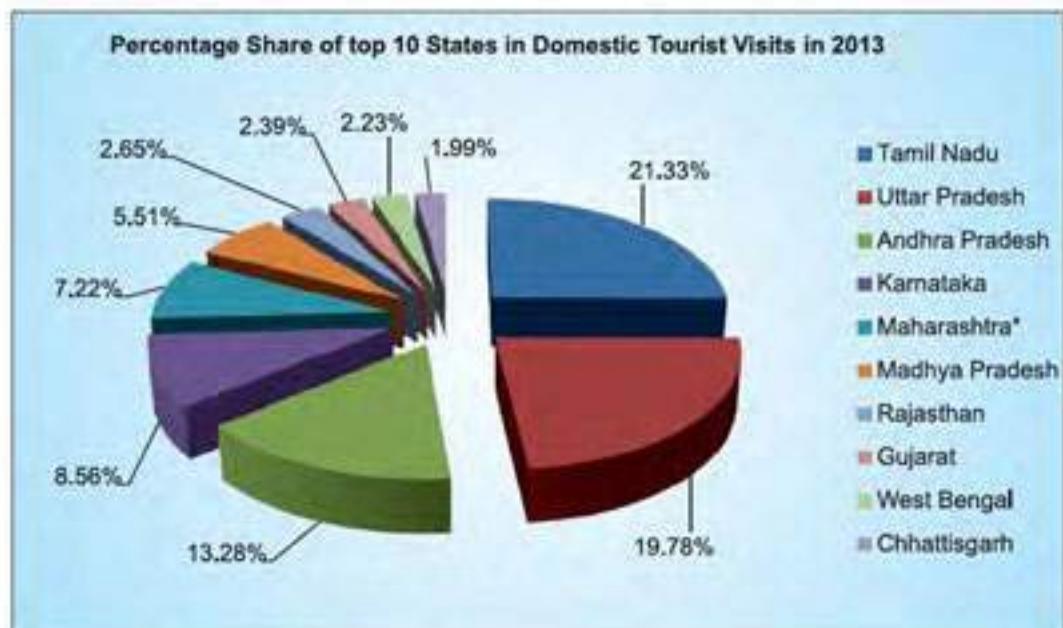
Source: State/Union Territory Tourism Departments.

Note: *DTV & FTV data: Estimated using partial data provided by the state Governments.

DTV- Estimated using All India growth rate, FTV: FTA data at Delhi Port.

The top 10 States/UTs in terms of domestic tourist visits during 2013 were mostly the same as in 2012, with marginal changes in relative ranks of States except that the state Uttarakhand has been replaced by Chhattisgarh.

The following graph shows the percentage share of top 10 States/UTs in terms of domestic tourist visits in 2013.



The top 10 States/UTs in terms of foreign tourist visits during 2013 were mostly the same as in 2012, with marginal changes in relative ranks of States except that the State Himachal Pradesh has been replaced by Goa.

The following graph shows the percentage share of top 10 States/UTs in terms of foreign tourist visits in 2013.



5.2. VISITORS TO CENTRALLY PROTECTED TICKETED MONUMENTS

Any monument or site which is 100 years old, and is considered to be of national importance, is called an Archaeological Survey of India (ASI) Protected Monument or Site. Such monuments/sites are also commonly referred to as Centrally Protected Monuments/Sites. The statistics on number of visitors to monuments are maintained by the office of the Director General, ASI based on the records of number of tickets sold at the monuments to both Indian and foreign nationals.

For the purpose of conservation of monuments, the country has been divided into 24 ASI Circles, each under the jurisdiction of a Superintending Archaeologist. The headquarters office of ASI consolidates the visitors statistics received from different circles and provides the same to Ministry of Tourism. Table 5.2.1 gives the number of domestic and foreign visitors to all centrally protected ticketed monuments for the years from 1996 to 2013. The number of domestic visitors and foreign visitors to centrally protected ticketed monuments declined by -0.7 % and -2.2%, respectively, in 2013 over 2012.

Table 5.2.2 gives the list of 10 most popular monuments, in terms of number of visitors, in 2013. Among all the monuments, Taj Mahal, Agra (5.14 million) was the most visited monument in 2013 for domestic tourist visitors followed by Qutub Minar, Delhi (2.98 million) and Red Fort, Delhi (2.74 million). In respect of foreign tourist visitors also Taj Mahal, Agra (0.70 million) was the most visited monument, in 2013, followed by Agra Fort, Agra (0.36, million) and Qutub Minar (0.31 million).

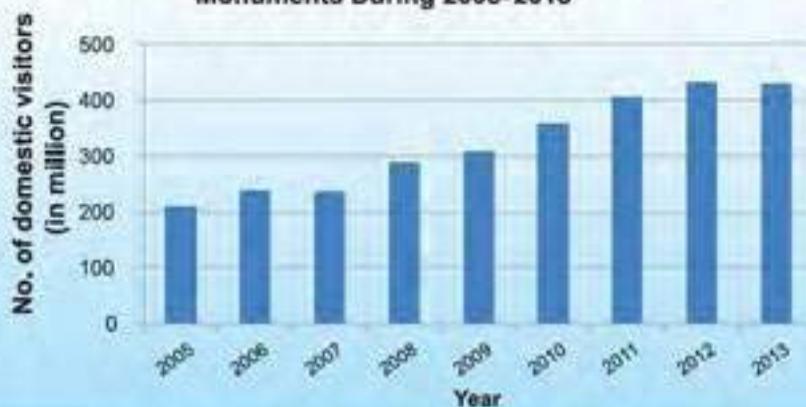
TABLE 5.2.1
VISITORS TO CENTRALLY PROTECTED TICKETED MONUMENTS,
1996-2013

Year	No. of Centrally Protected Ticketed ASI Monuments	Number of Visitors			Annual Growth Rate (%)		
		Domestic	Foreign	Total	Domestic	Foreign	Total
1996	68	N.A	N.A	10956764	N.A	N.A	N.A
1997	68	N.A	N.A	15767820	N.A	N.A	43.9
1998	68	N.A	N.A	13317242	N.A	N.A	-15.5
1999	68	N.A	N.A	20502547	N.A	N.A	54.0
2000	126	N.A	N.A	19539127	N.A	N.A	4.7
2001	126	N.A	N.A	20364901	N.A	N.A	4.2
2002	126	17333055	837012	18170067	N.A	N.A	-10.8
2003	126	19551820	1216615	20768435	12.8	45.4	14.3
2004	116	20356940	1788753	22145693	4.1	47.0	6.6
2005	116	21035864	2122436	23158300	3.3	18.7	4.6
2006	116	23815252	2250502	26065754	13.2	6.0	12.6
2007	116	23450419	2614254	26064673	-4.5	16.2	0.0
2008	117	28786608	2679763	31466371	22.8	2.5	20.7
2009	119	30804103	2195382	32999485	7.0	-18.1	4.9
2010	116	35770242	2998175	38768417	16.1	36.6	17.5
2011	116	40534481	2948065	43482546	13.3	-1.7	12.2
2012	116	43259075	3064778	46323853	6.7	4.0	6.5
2013	116	43019998	2995852	46015850	-7.0	-2.2	-0.7

Source: -Archaeological Survey of India (ASI)

The following graphs indicate that the numbers of domestic and foreign tourist visitors to centrally protected ticketed monuments during last 9 years have been consistently increasing except for a decline in domestic visitors during 2007 & 2013 and foreign visitors during 2009, 2011 and 2013.

Domestic Tourist Visitors to Centrally Protected Ticketed Monuments During 2005-2013



Foreign Tourist Visitors to Centrally Protected Ticketed Monuments During 2005-2013

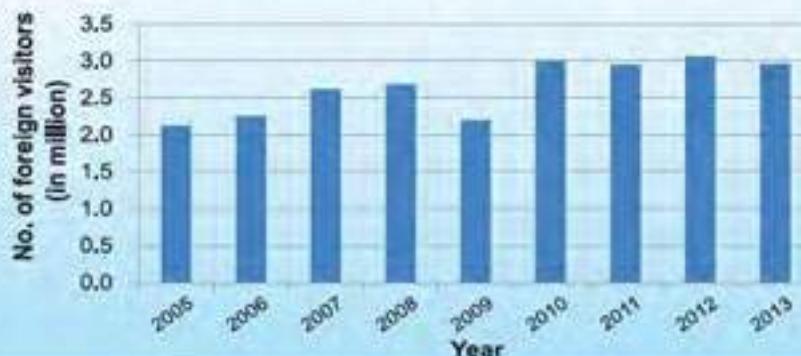


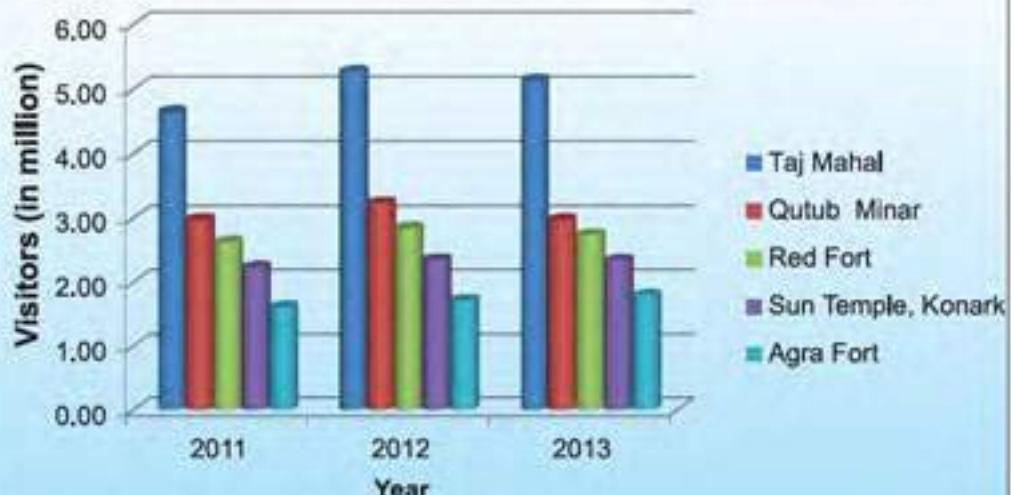
TABLE 5.2.2
**DOMESTIC AND FOREIGN VISITORS AT 10 MOST POPULAR CENTRALLY
 PROTECTED TICKETED ASI MONUMENTS DURING, 2013**

10 Most popular Centrally Protected Ticketed Monuments for Domestic Visitors in 2013				10 Most popular Centrally Protected Ticketed Monuments for Foreign Visitors in 2013			
Rank	Name of Monument	No. of Domestic Visitors	Percentage share	Rank	Name of Monument	No. of Foreign Visitors	Percentage share
1	Taj Mahal, Agra	5139640	11.9	1	Taj Mahal, Agra	695702	23.2
2	Qutub Minar, Delhi	2980710	6.9	2	Agra Fort, Agra	363823	12.1
3	Red Fort, Delhi	2736699	6.4	3	Qutub Minar, Delhi	307043	10.2
4	Sun Temple, Konark	2334556	5.4	4	Humayun's Tomb, Delhi	276641	9.2
5	Agra Fort, Agra	1794737	4.2	5	Fatehpur Sikri, Agra	255129	8.5
6	Golconda Fort, Hyderabad	1471232	3.4	6	Red Fort, Delhi	141498	4.7
7	Charminar, Hyderabad	1397000	3.2	7	Mattancherry Palace Museum Kochi, Distt. Ernakulam	104717	3.5
8	Ellora Caves, Aurangabad	1336367	3.1	8	Western Group of Temple, Khajuraho	89511	3.0
9	Bibi-Ka-Maqbara, Aurangabad	1276206	3.0	9	Excavated Site Sarnath	85991	2.9
10	Gol-Gumbaz, Bijapur	1064265	2.5	10	Group of Monuments, Mamallapuram	70840	2.4
	Others	21488586	50.0		Others	604957	20.2
	Total	43019998	100.0		Total	2995852	100.0

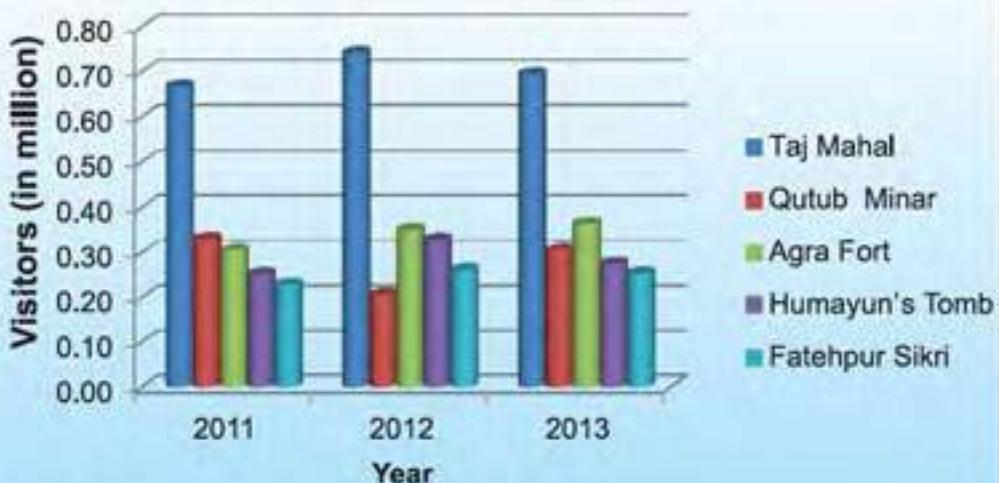
Source: Archaeological Survey of India (ASI)

The following graphs indicate that the top monuments in terms of domestic and foreign tourist visitors to centrally protected ticketed monuments during last 3 years.

Top Five Monuments in terms of Domestic Visitors, 2013



Top Five Monuments in terms of Foreign Visitors, 2013



S. No	Name of the Monument	2011		2012		2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
I Agra Circle							
1	Taj Mahal	4646203	668903	5281560	743256	5139640	695702
2	Agra Fort	1605432	306097	1713207	351189	1794737	363823
3	Akbar's Tomb, Sikandra	443553	57852	540976	60228	496756	45980
4	Fatehpur Sikri	422450	229091	468602	263590	489408	255129
5	Itimad-ud-Daula, Agra	117401	62625	134514	79471	142912	68092
6	Mehtab Bagh, Agra	98291	22214	102903	23605	95266	20174
7	Ram Bagh, Agra	41820	307	58224	284	72636	243
8	Mariyam's Tomb, Agra	23880	234	43685	365	47049	316
	Total	7399030	1347323	8343671	1521988	8278404	1449459
II Aurangabad Circle							
9	Ellora Caves	1308262	33023	1423480	32913	1336367	30749
10	Bibi-Ka-Maqbara, Aurangabad	1215998	14640	1295481	15367	1276206	14536
11	Daulatabad Fort	631117	9137	647810	8867	575050	7805
12	Ajanta Caves	412473	28576	426851	28062	389894	25997
13	Pandaulena Caves, Pathardi	169035	1121	217424	1051	202064	1113
14	Aurangabad Caves	49502	2362	45031	2329	69196	2045
	Total	3786387	88859	4056077	88589	3848777	82245
III Mumbai Circle							
15	Shaniwarwada, Pune	628206	6965	592983	7668	708000	7208
16	Elephanta caves, Gharapuri, Mumbai	371122	19959	485193	30913	595229	29461
17	Lenyadri Caves	376882	140	383615	130	384679	99
18	Kanheri Caves, Mumbai (Suburban)	177860	4418	201339	4874	171102	3293
19	Karla Caves, Karla	208100	2559	198802	1915	216338	1896
20	Raigad Fort	184235	194	174209	154	170813	315
21	Aga Khan Palace, Pune	105072	9866	100564	7134	107925	6880
22	Caves, Temples & Inscription, Bhaja	47107	1011	45986	1071	36604	847
23	Kolaba Fort	58808	212	43784	168	53781	115
24	Old Fort Sholapur	16373	16	12236	15	19411	13
	Total	2173765	45340	2238711	54042	2463882	50127

S. No	Name of the Monument	2011		2012		2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
IV Bengaluru Circle							
25	Daria Daaulat Bagh, Srirangapatnam	929777	26132	863665	25888	933385	25519
26	World Heritage Site, Hampi,	473338	36334	502014	38173	487995	39473
27	Chitradurga Fort, Chitradurga	348398	565	376665	764	378629	911
28	Keshava Temple, Somnathpur	148343	6277	154500	13396	180490	12236
29	Tippu Palace, Bengaluru	213525	11959	136769	6432	132423	4974
30	Bellary Fort, Bellary	5403	67	7477	49	8806	91
	Total	2118784	81334	2041090	84702	2121728	83204
V Bhopal Circle							
31	Roopmati Pavilion,	287490	2020	299790	2527	324845	2489
32	Royal Palaces, Mandu	266739	2402	282207	3102	304714	3132
33	Gwalior Fort, Gwalior	259705	14766	270450	12971	257003	11054
34	Western Group of Temple, Khajuraho	253544	97356	260946	97724	276434	89511
35	Buddhist Monuments Sanchi	207960	6800	212796	6730	209942	6321
36	Hoshang Shah's Tomb, Mandu	163670	2066	173423	2801	178943	2865
37	The Palace Situated, Burhanpur	50607	165	61644	298	61796	388
38	Buddhist Caves	21800	12	22666	22	22899	32
39	Bhojshala and Kamal Maula's Mosque	12162	0	11994	0	18187	0
	Total	1523677	125587	1595916	126175	1654763	115792
VI Bhubaneswar Circle							
40	Sun Temple, Konark	2225087	8762	2347441	8580	2334556	7486
41	Udayagiri & Khandagiri Sites	474445	3574	434123	3363	542990	2991
42	Ratnagiri Monument	24453	495	32689	614	43575	425
43	Raja Rani Temple, Bhubaneswar	30753	2103	23761	1788	19746	1207
44	Lalitagiri Monument	13925	420	20328	430	25054	305
	Total	2768663	15354	2858342	14775	2965921	12414

S. No	Name of the Monument	2011		2012		2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
VII	Chandigarh Circle						
45	Sheikh Chilli's Tomb Thanesar	100939	118	125473	121	87224	76
46	Suraj Kund, Faridabad	34776	90	35912	118	46832	73
	Total	135715	208	161385	239	134056	149
VIII	Chennai Circle						
47	Group of Monuments, Mamallapuram	1022579	74187	989804	73598	1055333	70840
48	Gingee Fort, Gingee	171639	3926	183905	4532	166731	4680
49	Front Museum, Thirumayam	46240	855	47019	836	44024	1681
50	Rock Cut-Jain Temple, Sittanasal	27581	402	33101	287	31801	298
51	Fort on Rock Dindigul	35879	113	30682	129	34908	192
52	Natural Caven with inscription Eladipattanam, Sittanattanam	26063	96	26815	108	29132	138
53	Moovarkoil, Kodumbalur	2574	141	1090	31	928	20
	Total	1332555	79720	1312416	79521	1362857	77849
IX	Delhi Circle						
54	Qutub Minar	2980415	331557	3240068	206997	2980710	307043
55	Red Fort	2615976	160425	2854123	163963	2736699	141498
56	Humayun's Tomb	522458	253967	879327	330216	593441	276641
57	Purana Quila	726034	25742	718615	8870	847779	8021
58	Jantar Mantar	469802	14605	489722	14445	408080	9759
59	Safdarjung Tomb	71751	6487	90387	6789	102262	5913
60	Kotla Feroz Shah	66921	867	72797	936	83865	1030
61	Tughlaqabad Fort	39638	1678	50483	1658	56940	1550
62	Khan-I-Khana	13117	222	15785	277	17033	278
63	Sultanghari's Tomb	350	0	606	24	2627	122
	Total	7506462	795550	8411913	734175	7829436	751855

S. No	Name of the Monument	2011		2012		2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
X Dharwad Circle							
64	Gol-Gumbaz, Bijapur	1125985	2804	1045718	2992	1064265	2978
65	Jaina & Vaishna Caves at Badami	450956	7085	458785	7507	463994	7437
66	Group of Monuments (WH), Pattadakal	333698	5969	345021	6263	339319	6266
67	Durga Temple complex, Aihole	235250	4806	245862	5024	232560	5209
68	Ibrahim Rouza, Bijapur	240281	2079	231219	2370	237486	2405
69	Temple & Sculpture Shed, Lakkundi	14040	172	14644	339	13538	214
	Total	2400210	22915	2341249	24495	2351162	24509
XI Guwahati Circle							
70	Karengbar of Ahoms Kings, Sibsagar	169019	482	164918	487	159317	479
71	Ranghar Pavilion, Jaisagar	63364	350	66634	386	60982	433
72	Ahom Raja's Palace, Garhgaon Distt. Sibsagar	50096	77	54619	137	54308	160
73	Group of four Maidams, Cheraideo Distt. Sibsagar	40839	20	37724	12	42054	20
74	Bishnuddol, Joysagar	15111	42	13573	43	15212	46
	Total	338429	971	337468	1065	331873	1138
XII Hyderabad Circle							
75	Golconda Fort, Hyderabad	1483333	19466	1605524	20377	1471232	20805
76	Charminar, Hyderabad	1440998	13388	1530627	12586	1397000	12833
77	Warangal Fort, Warangal	107753	304	117864	332	126479	410
78	Raja Mahal & Rani Mahal Chandragiri	177236	126	104517	97	79853	97
79	Reconstructed Monuments at Nagarjunakonda Hilltop	140469	585	94467	860	105409	511
80	Four storied Rock-cut Hindu Temple, Undavalli	67465	382	67693	449	58500	402
81	The Caves and Structural Stupa of Archeological, Guntupally	20045	12	19512	27	17924	21

S. No	Name of the Monument	2011		2012		2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
82	Ruined Buddhist Stupa & Remains Amaravati	18070	144	18020	255	15840	257
	Total	3455369	34407	3558224	34983	3272237	35336
XIII Jaipur Circle							
83	Chittaurgarh Fort	489832	20393	506237	20716	463008	22395
84	Kumbhalgarh Fort, Distt. Rajmang	165227	18106	193921	19481	215342	18750
85	Deeg Palaces, Deeg Distt. Bharatpur	33265	1292	42692	981	35471	1049
	Total	688324	39791	742850	41178	713821	42194
XIV Kolkata Circle							
86	Hazarduari Palace Museum, Murshidabad	680059	690	710912	676	694721	665
87	Cooch Behar Palace	388126	73	409077	59	384852	106
88	Bishnupur Group of Temples	196094	560	94812	461	159879	527
	Total	1264279	1323	1214801	1196	1239452	1298
XV Lucknow Circle							
89	Residency, Lucknow	275922	2404	327308	2684	396972	4039
90	Rani Jhansi Kila, Jhansi	273200	746	273609	749	254786	1426
91	Monument of Sravasti, Sahet-Mahet	143357	8204	152706	8389	153060	14790
92	Rani Jhansi Mahal, Jhansi	20306	75	16716	24	14154	37
	Total	712785	11429	770339	11846	818972	20292
XVI Patna Circle							
93	Excavated Remains at Nalanda	485582	21404	568929	24430	481995	23205
94	Excavated Site Sarnath	323560	71249	336262	77411	467538	85991
95	Shershah Suri's Tomb	215787	332	207410	283	215190	451
96	Jaunpur Fort	159507	152	195696	248	232626	310
97	Ancient site of Vaishali, Kothiwa	128215	7566	135055	9325	122766	9108
98	Remains of Patliputra, Kumrahar, Patna	103098	827	111474	556	189435	601

S. No	Name of the Monument	2011		2012		2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
99	Excavated Site Vikramshila, Antichak	50966	4664	58895	393	56707	360
100	Lord Cornwallis Tomb, Gazipur	20613	12	23367	6	32295	9
101	Observatory Man Singh, Varanasi (U.P.)	5878	448	6930	428	20240	779
	Total	1493206	106654	1644018	113080	1818792	120814
XVII Raipur Circle							
102	Laxman Temple, Sirpur	37643	65	47249	52	64800	60
	Total	37643	65	47249	52	64800	60
XVIII Thrissur Circle							
103	Bekal Fort Pallikkare, Disstt. Kasargode	301265	598	341554	920	309314	1030
104	Mattancherry Palace Museum Kochi, Distt. Ernakulam	219908	130847	240175	119780	245885	104717
	Total	521173	131445	581729	120700	555199	105747
XIX Vadodra Circle							
105	Sun Temple Modhera	293598	3185	351730	3221	422148	3557
106	Rani-ki-Vav, Patan	270210	2680	313587	2452	330775	3073
107	Champaner-Pavagadh Archaeological Park	92853	2016	109934	1933	113226	1869
108	Buddhist Caves, Junagadh	53262	874	51869	787	86517	1118
109	Ashokan Rock Edict, Junagadh	35630	536	35727	589	69578	504
110	Baba Pyare and Khapra Kodiya Caves, Junagarh	229	13	917	52	1024	60
	Total	745782	9304	863764	9034	1023268	10181
XX Srinagar Circle							
111	Ancient Place at Leh, Disstt. Leh	7300	7377	NA	NA	15620	7825
112	Avantiswami Temple Avantipur, Distt. Pulwama	17339	83	27772	188	29240	153
113	Palace complex at Ram Nagar, Distt. Udhampur	3363	0	4040	9	4294	1
114	Group of Temple at Kiramchi Distt.	2611	0	3817	0	4283	0
	Total	30613	7460	35629	197	53437	7979

S. No	Name of the Monument	2011		2012		2013	
		Domestic	Foreign	Domestic	Foreign	Domestic	Foreign
XXI	Shimla Mini Circle						
115	Kangra Fort, Kangra	81423	2168	78817	1883	91395	2235
116	Rock Cut Caves, Masrur	20207	858	23417	863	25766	975
	Total	101630	3026	102234	2746	117161	3210
	Grand Total	40534481	2948065	43259075	3064778	43019998	2995852

Source: Archaeological Survey of India (ASI)

6

Chapter

Atithidevo Bhava



Incredible India

APPROVED HOTELS



APPROVED HOTELS

6.1 APPROVED HOTELS

The Ministry of Tourism has adopted a system of approving and classifying the hotels on the basis of the facilities and services provided by them. The detailed guidelines for approval and classification of hotels in different categories and accommodation establishments are given at Appendices-I to V.

The Ministry of Tourism launched a web based Public Service Delivery System for approval of hotel projects and classification/re-classification of hotels on 03.04.2013 with a view to bring transparency in granting approvals for hotel projects and classification status to functioning hotels. The hotel promoters and owners seek voluntary approval from the Ministry of Tourism for their projects and classification from one Star to Five Star Deluxe by submitting applications. These requests are processed for a final decision within 90 days from the date of receipt of applications.

The number of approved hotels and rooms vary from year to year as the classification/re-classification of hotels is a voluntary scheme of the Ministry of Tourism. The provisional category-wise details regarding the number of hotels and hotel rooms (classified/re-classified) as on 31.12.2013 are presented below:-

TABLE 6.1.1

NUMBER OF APPROVED HOTELS AND AVAILABILITY OF HOTEL ROOMS DURING, 2013

Category of Hotels	No. of Hotels (P)	No. of Rooms (P)
	As on 31.12.2013	As on 31.12.2013
One Star	82	2086
Two Star	121	3154
Three Star	637	26617
Four Star	111	7738
Five Star	85	10128
Five Star Deluxe	106	21820
Apartment Hotels	3	249
Time Share Resorts	1	31
Heritage Hotels	46	1322
B & B Establishment	31	158
Guest House	4	61
Unclassified	30	1989
Total	1257	75353

P :- Provisional

6.2 DISTRIBUTION OF HOTELS IN DIFFERENT STATES/UTs OF INDIA

Table 6.2.1 provides the number of Classified Hotels / Heritage Hotels /Apartment Hotels/ Time Share Resorts/ Silver B & B Establishment/ Guest House/Unclassified Hotels and Hotel rooms by categories in different States/UTs of the country. Table 6.2.1 reveals that Maharashtra has the maximum (14612) number of hotel rooms followed by Kerala (9799) and Tamil Nadu (7642).

TABLE 6.2.1
DISTRIBUTION OF CLASSIFIED HOTELS AND HOTEL ROOMS BY CATEGORIES IN
DIFFERENT STATES / UTs IN INDIA.

S. No.	States/UTs	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Apartment Hotel	Time Share Resorts	Heritage Hotels	Un- classifed	B&B Establishm- ent	Guest House	Total
1	Andhra Pradesh													
	No. of Hotels	5	7	6	43	1	-	-	-	-	1	-	-	63
	No. of Rooms	1188	1152	787	3062	10	-	-	-	-	70	-	-	6269
2	Arunachal Pradesh													0
	No. of Hotels	-	-	-	1	1	-	-	-	-	-	-	-	2
	No. of Rooms	-	-	-	18	23	-	-	-	-	-	-	-	41
3	Andaman & Nicobar													0
	No. of Hotels	-	-	-	-	2	-	-	-	-	-	-	-	2
	No. of Rooms	-	-	-	-	59	-	-	-	-	-	-	-	59
4	Assam													0
	No. of Hotels	-	-	3	13	5	-	-	-	-	1	-	-	22
	No. of Rooms	-	-	117	442	115	-	-	-	-	39	-	-	713
5	Bihar													0
	No. of Hotels	-	-	-	1	-	-	-	-	-	1	-	-	2
	No. of Rooms	-	-	-	63	-	-	-	-	-	68	-	-	131
6	Chandigarh													0
	No. of Hotels	1	1	1	-	2	-	-	-	1	-	-	-	6
	No. of Rooms	164	155	114	-	24	-	-	-	12	-	-	-	469

S. No.	States/UTs	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Apartment Hotel	Time Share Resorts	Heritage Hotels	Un - classified	B&B Establishm ent	Guest House	Total
7	Chhattisgarh													0
	No. of Hotels	-	-	-	1	-	-	-	-	-	-	-	-	1
	No. of Rooms	-	-	-	54	-	-	-	-	-	-	-	-	54
8	D&N Haveli													0
	No. of Hotels	-	-	-	1	-	-	-	-	-	-	-	-	1
	No. of Rooms	-	-	-	50	-	-	-	-	-	-	-	-	50
9	Daman & Diu													0
	No. of Hotels	-	-	-	1	-	-	-	-	-	-	-	-	1
	No. of Rooms	-	-	-	60	-	-	-	-	-	-	-	-	60
10	Delhi													0
	No. of Hotels	15	5	7	8	6	-	-	-	-	5	1	-	47
	No. of Rooms	4402	1140	637	208	223	-	-	-	-	478	5	-	7093
11	Goa													0
	No. of Hotels	12	11	3	16	3	1	-	-	-	1	1	-	48
	No. of Rooms	1960	929	434	1017	162	10	-	-	-	27	5	-	4544
12	Gujarat													0
	No. of Hotels	1	9	3	28	-	-	-	-	-	1	1	-	43
	No. of Rooms	170	867	166	1641	-	-	-	-	-	37	5	-	2886
13	Haryana													0
	No. of Hotels	3	2	5	32	1	-	-	-	-	3	-	-	46
	No. of Rooms	344	365	504	1974	24	-	-	-	-	509	-	-	3720
14	Himachal Pradesh													0
	No. of Hotels	1	-	-	3	2	-	-	-	3	1	-	-	10
	No. of Rooms	85	-	-	84	66	-	-	-	86	59	-	-	380
15	Jammu & Kashmir													0
	No. of Hotels	-	-	-	2	-	-	-	-	-	-	-	-	2
	No. of Rooms	-	-	-	107	-	-	-	-	-	-	-	-	107
16	Jharkhand													0

S. No.	States/UTs	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Apartment Hotel	Time Share Resorts	Heritage Hotels	Un - classified	B&B Establishm ent	Guest House	Total
	No. of Hotels	-	-	-	4	-	-	-	-	-	-	-	-	4
	No. of Rooms	-	-	-	198	-	-	-	-	-	-	-	-	198
17	Kerala													0
	No. of Hotels	7	12	53	269	32	-	-	-	11	5	-	-	389
	No. of Rooms	559	958	1780	5798	495	-	-	-	130	79	-	-	9799
18	Karnataka													0
	No. of Hotels	7	4	2	18	2	3	1	-	-	2	-	-	39
	No. of Rooms	1575	513	159	1182	67	89	125	-	-	171	-	-	3881
19	Lakshadweep													0
	No. of Hotels	-	-	-	-	-	-	-	-	-	-	-	-	0
	No. of Rooms	-	-	-	-	-	-	-	-	-	-	-	-	0
20	Maharashtra													0
	No. of Hotels	20	11	13	59	21	26	1			4	24	4	183
	No. of Rooms	6576	1204	1613	3574	760	453	80	-	-	166	125	61	14612
21	Manipur													0
	No. of Hotels	-	-	-	1	-	-	-	-	-	-	-	-	1
	No. of Rooms	-	-	-	59	-	-	-	-	-	-	-	-	59
22	Meghalaya													0
	No. of Hotels	-	-	1	-	-	-	-	-	-	-	-	-	1
	No. of Rooms	-	-	50	-	-	-	-	-	-	-	-	-	50
23	Mizoram													0
	No. of Hotels	-	-	-	-	-	-	-	-	-	-	-	-	0
	No. of Rooms	-	-	-	-	-	-	-	-	-	-	-	-	0
24	Madhya Pradesh													0
	No. of Hotels	2	3	-	18	1	-	-	-	2	-	-	-	26
	No. of Rooms	137	373	-	558	20	-	-	-	12	-	-	-	1100
25	Nagaland													0
	No. of Hotels	-	-	-	-	1	-	-	-	-	-	-	-	1

S. No.	States/UTs	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Apartment Hotel	Time Share Resorts	Heritage Hotels	Un - classified	B&B Establishm ent	Guest House	Total
	No. of Rooms	-	-	-	-	19	-	-	-	-	-	-	-	19
26	Odisha													0
	No. of Hotels	2	-	-	6	-	-	-	-	-	-	-	-	8
	No. of Rooms	164	-	-	411	-	-	-	-	-	-	-	-	575
27	Puducherry													0
	No. of Hotels	-	-	-	6	1	-	-	-	1	-	-	-	8
	No. of Rooms	-	-	-	403	39	-	-	-	11	-	-	-	453
28	Punjab													0
	No. of Hotels	2	-	1	13	4	-	-	-	-	-	-	-	20
	No. of Rooms	329	-	41	477	57	-	-	-	-	-	-	-	904
29	Rajasthan													0
	No. of Hotels	10	5	2	16	5	-	-	-	23	1	-	-	62
	No. of Rooms	973	556	143	905	97	-	-	-	929	60	-	-	3663
30	Sikkim													0
	No. of Hotels	1	1	-	2	6	-	-	-	1	-	-	-	11
	No. of Rooms	68	25	-	51	93	-	-	-	25	-	-	-	262
31	Tamil Nadu													0
	No. of Hotels	6	6	6	45	15	52	-	-	2	-	-	-	132
	No. of Rooms	1225	696	803	2845	484	1534	-	-	55	-	-	-	7642
32	Tripura													0
	No. of Hotels	-	-	-	-	-	-	-	-	-	-	-	-	0
	No. of Rooms	-	-	-	-	-	-	-	-	-	-	-	-	0
33	Telangana													0
	No. of Hotels	-	-	-	-	-	-	-	-	-	-	-	-	0
	No. of Rooms	-	-	-	-	-	-	-	-	-	-	-	-	0
34	Uttar Pradesh													0
	No. of Hotels	7	6	1	16	4	-	1	-	-	2	-	-	37
	No. of Rooms	1194	864	42	800	157	-	44	-	-	69	-	-	3170
35	Uttarakhand													0

S. No.	States/UTs	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Apartment Hotel	Time Share Resorts	Heritage Hotels	Un - classified	B&B Establishm -ent	Guest House	Total
	No. of Hotels	1	-	2	5	2	-	-	1	2	-	-	-	13
	No. of Rooms	90	-	124	156	45	-	-	31	62	-	-	-	508
36	West Bengal													0
	No. of Hotels	3	2	2	9	4	-	-	-	-	2	4	-	26
	No. of Rooms	617	331	224	420	115	-	-	-	-	157	18	-	1882
	Grand Total													
	No. of Hotels	106	85	111	637	121	82	3	1	46	30	31	4	1257
	No. of Rooms	21820	10128	7738	26617	3154	2086	249	31	1322	1989	158	61	75353

6.3 INDIAN HOTEL INDUSTRY SURVEY, 2012-13

The Federation of Hotel & Restaurant Associations of India (FHRAI) collects information from its members through a questionnaire for its Annual Indian Hotel Industry Survey, which is analysed and presented in a report. For the year 2012-13 (April-March), FHRAI received information from 1450 members.

Based on FHRAI's 2012-13 survey, information on various aspects of hotel industry in India like profile of an average hotel, average number of employees per hotel, average percentage of trained employees per hotel and Guest Analysis is presented in Tables 6.3.1 to 6.3.5

- Following are the important highlights of the data presented in these tables:-
- Most of the rooms in all categories of hotels were air-conditioned.
- Average employee per room for all categories of hotels taken together was 1.6. Among the classified categories, 1.0 in 1-Star, 1.1 in 2-Star and 1.9 in 5-Star Deluxe category.
- 79.6% of the employees were trained: highest being 89.7% under 5-Star category and lowest 73.3% under 2-Star category.
- UK and USA dominate the overall visitations with a share of 11.8% and 11.2% respectively.
- Share of tourists from UK was the highest in 2 Star category of hotels and share of tourists from USA was highest in 5 Star Deluxe category of hotel.
- Share of tourists from France & other European countries was the highest in Heritage category hotels.
- Share of domestic guests was 75.2% for all the hotels taken together.
- Leisure tourists constituted about 41.8% of the total guests and the remaining 58.2% were business guests.
- While the average stay of foreign guests was 3.0 days, it was 2.7 days for domestic guests.
- Average stay of business and leisure guests was 2.7 days and 2.3 days respectively.

TABLE 6.3.1
TYPICAL ROOM PROFILE OF AN AVERAGE HOTEL BY CATEGORY OF HOTELS 2012-13

Composition		5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Herit-age	Others	All-India Average
Number of Responses		46	69	123	519	268	95	55	275	1,450
No. of Air-Conditioned Rooms	Single	50.4	21.3	11.8	4.6	3.6	1.2	2.3	2.8	6.6
	Double	152.9	104.3	72.1	39.4	26.9	15.0	21.9	21.7	40.9
	Suites	17.4	7.3	8.5	4.5	3.3	1.5	6.8	2.8	4.7
No. of Non Air-Conditioned Rooms	Single	0.0	0.0	0.0	0.6	0.9	2.1	0.3	0.8	0.7
	Double	0.0	1.8	1.8	3.9	6.5	7.0	3.9	6.0	4.6
	Suites	3.7	0.1	0.2	0.5	1.0	0.5	0.9	0.5	0.7
Total Average rooms		224.4	134.7	94.3	53.4	42.2	27.3	36.0	34.5	58.1

Source: Indian Hotel Industry Survey 2012-2013, FHRAI

The number of non-airconditioned rooms in lower star category hotels appears to be higher, partly because many are located in hill stations where air-conditioning is not provided in hotels.

Table 6.3.2
AVERAGE NUMBER OF EMPLOYEES PER HOTEL (PERMANENT/CONTRACT/FULL TIME/PART TIME), BY CATEGORY OF HOTELS, 2012-13

Composition		5 Star Delux	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Others	All India Average
Number of Responses		46	61	107	468	236	87	50	185	1,238
No. of Managers	Male	49.7	29.4	16.7	6.8	3.2	1.9	5.3	3.0	8.7
	Female	12.8	5.5	2.8	0.8	0.6	0.2	0.7	0.4	1.5
No. of Supervisors	Male	54.2	37.7	21.9	10.3	4.6	2.5	8.1	4.0	11.6
	Female	11.6	5.4	3.1	1.5	0.8	0.8	0.6	0.6	1.9
No. of Staff	Male	262.5	153.3	111.4	61.1	33.4	19.6	52.4	28.5	64.0
	Female	34.2	15.4	12.3	7.4	3.8	2.2	4.0	3.1	7.5
Total No. of Employees		425.0	246.8	167.0	87.9	46.4	27.2	71.2	39.6	95.1
Avg. Employees/Room		1.9	1.8	1.7	1.7	1.1	1.0	2.0	1.2	1.6

Source: Indian Hotel Industry Survey 2012-13, FHRAI

TABLE 6.3.3
Average Percentage of Trained Employees per Hotel by Category of Hotels , 2012-13

Composition	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Herit-age	Others	All India Average
Number of Responses	44	55	97	333	142	39	33	76	819
Managers	94.4	89.2	90.1	88.2	86.8	83.9	88.4	88.7	88.4
Supervisors	89.8	87.5	87.4	79.8	73.8	83.1	93.8	81.6	83.6
Staff	80.9	92.3	73.4	63.2	59.2	62.4	66.3	63.3	66.7
Total Average Trained Employees *	88.4	89.7	83.7	77.1	73.3	76.5	82.8	77.9	79.6
Total Average Un-Trained Employees	11.7	10.3	16.4	22.9	26.8	23.5	17.2	22.1	20.4

Source: Indian Hotel Industry Survey 2012-13, FHRAI

* Trained Employees include those with a minimum one-year certificate course from a hotel management or equivalent institution, however, some hotels may have included those with short term (in-house) training.

Table 6.3.4
Distribution of Hotel Guests by Country of Origin, 2012-13

(in percentage)

Country	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Herit-age	Others	All India Average
Number of Responses	33	52	69	217	81	19	28	26	525
ASEAN *	3.5	3.5	4.9	6.4	5.3	2.6	1.5	4.0	5.1
Australia	2.1	3.1	3.2	3.3	3.4	6.0	4.1	6.9	3.5
Canada	2.2	2.1	2.8	3.9	3.4	2.2	3.8	3.5	3.3
Caribbean	0.4	0.5	0.8	0.8	0.4	0.8	0.4	1.2	0.7
China	1.8	4.1	4.1	5.5	5.0	3.7	1.8	7.0	4.7
France	4.4	3.3	4.3	6.6	4.9	8.8	15.1	6.8	6.1
Germany	4.2	4.9	5.0	7.4	6.4	5.2	10.4	4.1	6.4

Country	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Herit-age	Others	All India Average
Japan	4.0	6.3	5.6	3.9	3.3	2.6	2.2	3.2	4.1
Middle East	4.2	2.7	5.1	6.2	6.5	9.9	2.2	2.9	5.4
Other European	6.9	10.2	8.7	9.6	8.9	11.3	12.6	8.5	9.4
Russia	1.3	6.6	5.3	4.3	3.9	2.3	1.0	2.4	4.0
SAARC **	4.2	4.4	5.1	5.7	10.5	10.2	2.7	11.6	6.4
South Africa	1.7	1.6	1.9	2.3	1.5	2.5	0.5	2.6	1.9
UK	11.7	10.5	10.7	12.2	13.8	10.0	10.3	10.6	11.8
USA	16.9	11.5	9.3	12.2	10.1	9.2	8.5	7.4	11.2
Other	30.5	24.8	23.3	9.8	12.8	12.6	23.2	17.5	16.0
Total	100	100	100	100	100	100	100	100	100

* ASEAN : Association of South East Asian Nation

** SAARC: South Asian Association for Regional Co-operation.

Source: Indian Hotel Industry Survey 2012-13, FHRAI

Table 6.3.5
Analysis of Hotel Guests, 2012-13 by Category of Hotels

Composition	5 Star Deluxe	5 Star	4 Star	3 Star	2 Star	1 Star	Heritage	Others	All India Average
Number of Responses	46	64	105	405	215	68	44	115	1,062
Domestic Guests (%)	47.7	62.9	66.7	77.7	81.4	86.8	54.7	83.6	75.2
Foreign Guests (%)	52.3	37.1	33.3	22.3	18.6	13.2	45.3	16.4	24.8
Total	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Total Business Guests(%)	63.1	62.2	61.4	60.0	55.5	58.8	27.9	60.5	58.2
Total Leisure Guests (%)	36.9	37.8	38.6	40.0	44.2	41.2	72.1	39.4	41.8
Total	100.0	100.0	100.0	100.0	99.7	100.0	100.0	100.0	100.0
Avg. Stay of Foreign Guests (Days)	2.5	4.1	3.4	3.1	2.9	2.2	2.4	2.7	3.0
Avg. Stay of Domestic Guests (Days)	2.0	2.3	2.4	2.8	2.8	2.0	2.0	5.0	2.7
Avg. Stay of Business Guests (Days)	1.9	2.2	3.0	3.0	2.7	2.0	2.0	2.3	2.7
Avg. Stay of leisure Guests (Days)	2.2	2.2	2.2	2.3	2.5	2.0	2.2	2.9	2.3
Repeat Guests (%)	41.8	36.0	43.5	45.5	50.9	48.1	28.5	48.4	45.7



7

Chapter

Atithidevo Bhava



Incredible India

TRAVEL TRADE



TRAVEL TRADE

7.1 INBOUND TOUR OPERATORS, TRAVEL AGENTS, TOURIST TRANSPORT OPERATORS, ADVENTURE TOUR OPERATORS AND DOMESTIC TOUR OPERATORS

In order to provide quality services to tourists, the Ministry of Tourism grants recognition to inbound tour operators, travel agents, tourist transport operators, adventure tour operators and domestic tour operators in the country, as per the prescribed guidelines (**Appendices – VI to X**).

As on 31st December 2013, 168 Inbound Tour Operators, 107 Travel agents, 54 Tourist Transport Operators, 6 Adventure Tour Operators, and 14 Domestic Tour Operators were registered with the Ministry. The State/UTs-wise distributions of these units are given in Table 7.1.1. Out of 168 recognised Inbound Tour Operators in the country, 93 are from Delhi, followed by 18 from Maharashtra 10 each from Haryana and Tamilnadu. The highest numbers of recognized Inbound Tour Operators, Travel Agents, Tourist Transport Operators, Adventure Tour Operators and Domestic Tour Operators are from Delhi. Out of the 6 registered Adventure Tour Operators, 3 are from J&K followed by 2 from Delhi and 1 from Haryana.

Table 7.1.1

STATE –WISE NUMBER OF RECOGNIZED INBOUND TOUR OPERATORS, TRAVEL AGENTS/AGENCIES
TOURIST TRANSPORT OPERATORS, ADVENTURE TOUR OPERATORS &
DOMESTIC TOUR OPERATORS (As ON 31st December 2013)

S. No.	State/Union Territory	Inbound Tour Operators	Travel Agents/ Agencies	Tourist Transport Operators	Adventure Tour Operators	Domestic Tour Operators
1	Andaman & Nicobar	0	0	0	0	0
2	Andhra Pradesh	2	4	1	0	1
3	Arunachal Pradesh	0	0	0	0	0
4	Assam	3	1	0	0	0
5	Bihar	1	2	0	0	0
6	Chandigarh	0	0	2	0	0
7	Chhattisgarh	0	0	0	0	0

S. No.	State/Union Territory	Inbound Tour Operators	Travel Agents/ Agencies	Tourist Transport Operators	Adventure Tour Operators	Domestic Tour Operators
8	Dadra & Nagar Haveli	0	0	0	0	0
9	Daman & Diu	0	0	0	0	0
10	Delhi	93	35	18	2	6
11	Goa	3	2	0	0	0
12	Gujarat	5	6	0	0	0
13	Haryana	10	0	1	1	1
14	Himachal Pradesh	0	0	0	0	1
15	Jammu & Kashmir	1	0	0	3	0
16	Jharkhand	0	0	0	0	0
17	Karnataka	4	5	2	0	1
18	Kerala	6	2	11	0	0
19	Lakshadweep	0	0	0	0	0
20	Madhya Pradesh	0	0	0	0	0
21	Maharashtra	18	20	7	0	2
22	Manipur	0	1	0	0	0
23	Meghalaya	0	0	0	0	0
24	Mizoram	0	0	0	0	0
25	Nagaland	0	0	0	0	0
26	Odisha	0	0	2	0	0
27	Puducherry	0	1	1	0	0
28	Punjab	0	1	1	0	0
29	Rajasthan	5	1	0	0	0
30	Sikkim	1	0	0	0	0
31	Tamil Nadu	10	16	6	0	1
32	Tripura	0	0	0	0	0
33	Telangana	0	0	0	0	0
34	Uttar Pradesh	4	5	0	0	0
35	Uttarakhand	0	1	0	0	0
36	West Bengal	2	4	2	0	1
	Total	168	107	54	06	14

8

Chapter

Atithidevo Bhava



Incredible India

HUMAN RESOURCE DEVELOPMENT



HUMAN RESOURCE DEVELOPMENT

To meet the demand for trained manpower in the hospitality industries, the Ministry of Tourism continues to actively pursue its endeavour to create institutional infrastructure in the form of Indian Institute of Tourism & Travel Management, Institutes of Hotel Management and Food Craft Institutes. The prescribed guidelines for the scheme of financial assistance to IHMs/FCIs/IITTM/ITIs/Polytechnic Inst./Universities/Govt. college/Govt. Vocational School and PSUs are given in **Appendix -XI**.

8.1 INDIAN INSTITUTE OF TOURISM AND TRAVEL MANAGEMENT

The Indian Institute of Tourism and Travel Management (IITTM) was established as registered society in 1983 at New Delhi under the Ministry of Tourism with the objective of developing and promoting education, training and research in the field of travel and tourism. In August 1992 the institute was shifted to Gwalior and started expanding region- wise from 1995.

The IITTM started its Eastern Regional Centre (ERC) at Bhubaneswar in the year 1995. National Institute of Water Sports (NIWS), Goa was designated a centre under the IITTM in 2004. Northern centre IITTM, New Delhi was established in the year 2008 and Sothern centre IITTM, Nellore (Andhra Pradesh) was added in the year 2010.

The IITTM offers two- years Post Graduate Diploma in Management (PGDM-Services/ International Business/ Tourism & Travel/ Tourism & Leisure/ Tourism and Cargo) programmes approved by the AICTE at its four centers except NIWS, Goa which is the only centre in the country offering courses in leisure water sports.

Table 8.1.1 gives the details of number of seat sanctioned/ Students enrolled and passed out in the various courses.

**TABLE 8.1.1
NUMBER OF SEATS SANCTIONED / ENROLLED AND PASSED OUT FROM
INDIAN INSTITUTE OF TOURISM & TRAVEL MANAGEMENT (IITM)**

Year Description	2011 - 13	2012 - 14	2013 - 15	Total
	S / E / P			
GWALIOR				
1. Tourism & Travel	93 / 93 / 78	93 / 89 / 84	93 / 90 / –	279 / 272 / 162
2. International Business	93 / 70 / 64	93 / 82 / 65	93 / 53 / –	279 / 205 / 129
3. Services	93 / 60 / 37	93 / 73 / –	93 / 29 / –	279 / 162 / 37
BHUBANESWAR				
1. Tourism & Travel	93 / 60 / 56	93 / 69 / 66	93 / 21 / –	279 / 150 / 122
2. International Business	93 / 15 / 12	93 / 25 / –	– / – / –	186 / 40 / 12
DELHI / NCR				
1. Tourism & Leisure	93 / 81 / 49	93 / 73 / 59	93 / 51 / –	279 / 205 / 108
NELLORE				
1. Tourism & Cargo	60 / 10 / 07	60 / 28 / –	60 / 30 / –	180 / 68 / 07

Note- 1. S/E/P Stands for Sanctioned/Enrolled/Passed

2. The mark (-) indicates:- Result Awaited

8.2 HOTEL MANAGEMENT & CATERING INSTITUTES:

National Council for Hotel Management & Catering Technology (NCHMCT) was set up in the year 1982 by Government of India as an autonomous body (Society registered under Societies Registration Act 1860). The Council regulates academics in the field of Hospitality Education and Training that is imparted at 21 Central Government sponsored Institutes of Hotel Management, 15 State Government sponsored Institutes, 15 Private Institutes and 07 Food craft Institutes that are currently affiliated to it and function in different parts of the country. Through the Council, these Institutes offer 10 different professional programme leading to award of Certificate, Diploma, Post Graduate Diploma, Bachelor and Master Degree (last two programme are in collaboration with Indira Gandhi National Open university).

The details of the courses offered by the institutes affiliated to NCHMCT and number of students on roll along with course wise pass out in the year 2013-14 is given in table 8.2.1 and 8.2.2 respectively.

TABLE 8.2.1
**COURSES OFFERED BY INSTITUTES OF HOTEL MANAGEMENT/
 FOODCRAFT INSTITUTES**

S. No.	Courses	Duration	Institute where courses offered in 2013-2014
1.	M.Sc. in Hospitality Administration	02 Years	Bengaluru, Chennai, Lucknow and Pusa-New Delhi
2.	B.Sc. in Hospitality & Hotel Administration	03 Years	All affiliated IHMs
3.	Post Graduate Diploma in Accommodation Operations & Management	1½ Years	Bhubaneswar, Guwahati, Kolkata and Pusa – New Delhi Central IHMs-Bhopal, Bhubaneswar, Chennai, Goa, Guwahati, Gwalior, Hyderabad, Kolkata, Mumbai, Pusa-New Delhi, Shillong and Shimla
4.	Craftsmanship Certificate Course in Food Production & Patisserie	1½ Years	State IHMs-Gangtok, Hamirpur, Tiruchirappalli, Medak, Indore, Tura, Tirupati Private IHMs-Shri Shakti College-Hyderabad, Desh Bhagat and CT Jalandhar
5.	Craftsmanship Certificate Course in Food & Beverage Service	6 Months	Central IHMs: Bhubaneswar, Goa, and Gwalior. State IHMs: Puducherry, Medak, Indore and Tirupati FCIs: Aligarh
6.	Diploma in Food Production	1½ Years	Central IHMs: AIHM-Chandigarh, Chennai, Guntakur, Hajipur, Jaipur, Lucknow, Shillong, Srinagar and Thiruvananthapuram SIHMs: CHIM-Chandigarh, Dehradun, Gangtok, Jodhpur, Kunukshetra, Faridabad, Bathinda, Puducherry, Rohtak, Panipat and Tiruchirappalli PIHMs: KC, Nawanshahr and Desh Bhagat FCIs: Ajmer, Aligarh, Balangir, Darjeeling, Udaipur, Hoshangpur, Nagaon, Tura, Bodhgaya and Chittara and HAMLA (Training Center of Indian Navy)
7.	Diploma in Food & Beverage Service	1½ Years	Central IHMs: Hajipur, Jaipur, Pusa-New Delhi, Shimla and Srinagar SIHMs: CHIM-Chandigarh, Dehradun, Jodhpur, Kunukshetra, Gangtok, Faridabad, Hamirpur, Puducherry, Rohtak and Panipat FCIs: Ajmer, Aligarh, Balangir, Darjeeling, Udaipur, Nagaon, Bodhgaya and INS HAMLA (Training Center of Indian Navy)
8.	Diploma in Front Office	1½ Years	Central IHMs: Jaipur and Srinagar State IHMs: CHIM-Chandigarh, Jodhpur and Nagaon FCIs: Ajmer, Balangir, Darjeeling and Udaipur
9.	Diploma in Housekeeping	1½ Years	Central IHMs: Gwalior and Srinagar State IHMs: CHIM-Chandigarh FCIs: Ajmer, Balangir, Udaipur, Aligarh, Nagon and Puducherry
10.	Diploma in Bakery & Confectionery	1½ Years	Central IHMs: Pusa-New Delhi, Srinagar and Shillong State IHMs: CHIM-Chandigarh and Tiruchirappalli FCIs: Ajmer, Aligarh, Nagon, Hoshangpur and Desh Bhagat

TABLE 8.2.2
NUMBER OF STUDENTS ON ROLL IN EACH COURSE AND PASSED OUT
IN THE YEAR 2011-2013

S.No.	Courses	On Roll 2012-13	Pass Out 2012-13
1.	M.Sc. in Hospitality Administration	47	47
2.	B.Sc. in Hospitality & Hotel Administration	4373	4243
3.	PG Diploma in Accommodation Operation & Management	76	57
4.	Craftman Course in Food Production	576	373
5.	Craftsmanship Certificate Course in Food & Beverage Service 88	73	
6.	Diploma in Food Production	914	882
7.	Diploma in Food & Beverage Service	459	361
8.	Diploma in Front Office Operations	170	157
9.	Diploma in Housekeeping	123	111
10.	Diploma in Bakery & Confectionery	135	133

9

Chapter

Atithidevo Bhava



Incredible India

PLAN OUTLAY



PLAN OUTLAY

9.1 ANNUAL PLAN OUTLAYS AND FINANCIAL ASSISTANCE PROVIDED TO STATES /UTs

The Govt. aims at positioning tourism as a major engine of economic growth and harnessing its direct and multiplier effects for employment and poverty eradication in an environmentally sustainable manner. The Plan Schemes of the Ministry of Tourism essentially relate to the following:

- (I) Tourism Product/Infrastructure Development
- (ii) Human Resource Development
- (iii) Promotion and Marketing
- (iv) Market Research and
- (v) Computerization and Information Technology

Since most of the infrastructure components and delivery systems are within the purview of the State Governments or private sector, the infrastructure for tourism is mainly being developed by providing financial assistance to State Government and UT administrations by providing various incentives to private entrepreneurs. Table 9.1.1 gives the scheme-wise outlay of Ministry of Tourism for the Annual Plan 2014-15. Table 9.1.2 gives Scheme-wise Outlay, Allocation and Expenditure of Ministry of Tourism for the Eleventh Five Year Plan (2007-08 to 2011-12). Table 9.1.3 gives the number of tourism projects and amount sanctioned by Ministry of Tourism to various State Governments /UT Administration during the Eleventh Five Year Plan period 2007-08 to 2011-12 and 2012-13 & 2013-14 of Twelfth Five Year Plan. Detail guideline of scheme for product/infrastructure development for destination & circuit and guideline for scheme of assistance for Large Revenue Generating Projects are given in **Appendix XII-XIII**.

**TABLE 9.1.1
SCHEME-WISE ANNUAL PLAN OUTLAY OF MINISTRY OF TOURISM FOR 2014-15**
(₹ Crore)

S.No.	Name of Schemes	Year 2014-15
	Centrally Sponsored Schemes (CSS)	
1	Product/Infrastructure Development for Destinations and Circuits	375.00
	TOTAL-CSS	375.00
	Central Sector Schemes (CS)	
2	Externally Aided Projects	1.50
3	Assistance to IHMs/FCIs/IITTM/NIWS	165.00
4	Capacity Building for Service Providers	117.40
5	Overseas Promotion and Publicity including Market Development Assistance	330.00
6	Domestic Promotion and Publicity including Hospitality	142.00
7	Incentives to Accommodation Infrastructure	0.10

8	Computerization and Information Technology	38.00
9	Market Research including 20 Years Perspective Plan	28.00
10	Assistance for Large Revenue Generating Projects	28.00
11	Creation of Land bank for Hotels	0.00
12	Assistance to Central Agencies for Tourism infrastructure development	57.00
13	New Scheme – Tourism Circuits	500.00
14	New Scheme – National Mission for Beautifying Pilgrimages Centers	100.00
	TOTAL-CS	1507.00
	GRAND TOTAL (CS+CSS)	1882.00

TABLE 9.1.2
Scheme-wise outlay Allocation and Expenditure of the Ministry
of Tourism for Eleventh five year Plan

Sr. No.	Name of Schemes / Programme	Outlay	Allocation	Expenditure	(₹ Crore)
A	Central Sector Schemes (CS)				
1.	Computerization and Information Technology	121.00	70.01	62.38	
2.	Domestic Promotion and Publicity including Hospitality	426.00	334.75	332.01	
3.	Overseas Promotion and Publicity including Market Development Assistance	1010.00	1113.50	1116.99	
4.	Externally Aided Projects (Buddhist Centers)	37.00	23.65	21.49	
5.	UNDP Endogenous Projects	2.00	5.30	4.21	
6.	Assistance for Large Revenue Generating Projects	200.00	69.37	26.57	
7.	Construction of building for IISM at Gulmarg (J&K)	13.00	11.00	6.31	
8.	Equity contribution to ITDC	73.00	73.00	73.00	
9.	Creation of Land for Hotels	14.00	12.02	0.00	
10.	Assistance to Central Agencies for Tourism infrastructure Development	25.00	31.28	20.51	
11.	Assistance to IHMs/FCIs/IITTM/NIWS	495.00	387.70	405.70	
12.	Capacity Building for Service Providers	95.00	86.00	73.21	
13.	Market Research including 20 Years Perspective Plan	29.00	20.64	15.97	
14.	Incentives to Accommodation Infrastructure	235.00	64.01	45.80	

B	Centrally Sponsored Schemes (CSS)			
15	Product /Infrastructure, Destination Development for destination and circuits.	2381.00	2650.77	2710.53
	Total	5156.00	4953.00	4914.68

TABLE 9.1.3

States / UTs-wise number of projects* and amount sanctioned* by the Ministry of Tourism during the 11th plan period 2007- 08 to 2011-12 12th plan period 2012-13 to 2013-14

(₹ Crore)

S.No.	State/UTs	Eleventh Five year plan 2007-08 to 2011-12		Twelfth five year plan 2012-13 to 2013-14			
		No.	Amt.	No.	Amt.	No.	Amt.
1	Andhra Pradesh	52	244.62	10	104.97	25	181.79
2	Arunachal Pradesh	62	174.25	17	66.33	11	74.74
3	Andaman & Nicobar	0	0.00	0	0.00	0	0.00
4	Assam	26	95.94	0	0.00	0	0.00
5	Bihar	18	57.59	0	0.00	14	111.10
6	Chandigarh	19	30.99	0	0.00	0	0.00
7	Chhattisgarh	11	45.58	0	0.00	0	0.00
8	Dadra & Nagar Haveli	3	0.24	0	0.00	0	0.00
9	Daman & Diu	1	0.12	0	0.00	0	0.00
10	Delhi	27	78.29	1	24.37	2	57.69
11	Goa	8	77.90	2	0.50	0	0.00
12	Gujarat	17	86.36	1	4.87	0	0.00
13	Haryana	35	99.78	0.00	0.00	8	14.87
14	Himachal Pradesh	45	128.79	5	29.80	1	33.71
15	Jammu & Kashmir	145	391.17	27	112.86	45	85.47
16	Jharkhand	21	67.27	2	48.86	1	5.00
17	Kerala	40	163.53	6	78.26	10	46.68
18	Karnataka	31	140.48	0.00	0.00	8	32.29
19	Lakshadweep	1	7.82	0.00	0.00	0	0.00
20	Maharashtra	23	162.96	6	79.64	6	67.95
21	Manipur	36	137.82	1	0.50	11	214.38
22	Meghalaya	28	61.64	2	0.68	1	0.47
23	Mizoram	33	79.59	4	1.12	10	47.11
24	Madhya Pradesh	59	203.19	16	206.50	9	100.21
25	Nagaland	75	176.96	17	47.60	9	52.22
26	Odisha	40	127.95	2	0.61	12	65.43
27	Puducherry	20	74.75	0	0.00	1	48.48
28	Punjab	16	66.69	0	0.00	2	10.39
29	Rajasthan	28	125.41	0	0.00	10	51.75
30	Sikkim	86	213.68	4	20.75	11	104.35
31	Tamil Nadu	49	160.78	2	20.42	0	0.00
32	Tripura	48	91.56	0	0.00	0	0.00
33	Uttar Pradesh	44	168.39	7	21.29	24	130.13
34	Uttarakhand	31	198.68	2	12.97	30	265.33
35	West Bengal	48	149.54	2	46.94	0	0.00
GRAND TOTAL		1226	4090.31	136	929.84	261	1801.54

*Includes Projects relating to Product/ Infrastructure Development for Destinations and Circuits (PIDDC), Human Resource Development (HRD), Fairs and Festivals & Rural Tourism



10

Chapter

Atithidevo Bhava



Incredible India

SURVEYS AND STUDIES



SURVEYS AND STUDIES

ASSESSMENT OF INTERNATIONAL MEDIA CAMPAIGNS OF THE MINISTRY OF TOURISM IN AUSTRALIA, FRANCE AND UNITED STATES OF AMERICA

More than 150 countries around the world promote tourism as a revenue generating arm of the economy. Tourism, wellness and experience go hand in hand to promote a destination. Publicity and marketing are important aspects for success of a destination. The Government of India under the Ministry of Tourism (MOT) promotes Indian sites and destinations in the international markets through global advertising campaigns in the Print, Television and Online mediums. The MOT also conducts studies to assess the impact of such campaigns in different countries from time to time. One such study "Assessment of International media campaigns" was conducted in 3 countries of USA, France and Australia to assess the impact of media campaigns launched in these countries from August, 2011 to March, 2012.

The study was conducted in the following two phases:

Phase I of the study focussed on assessing the reach, quality, effectiveness of the campaigns and perception of people about the campaigns in the source countries.

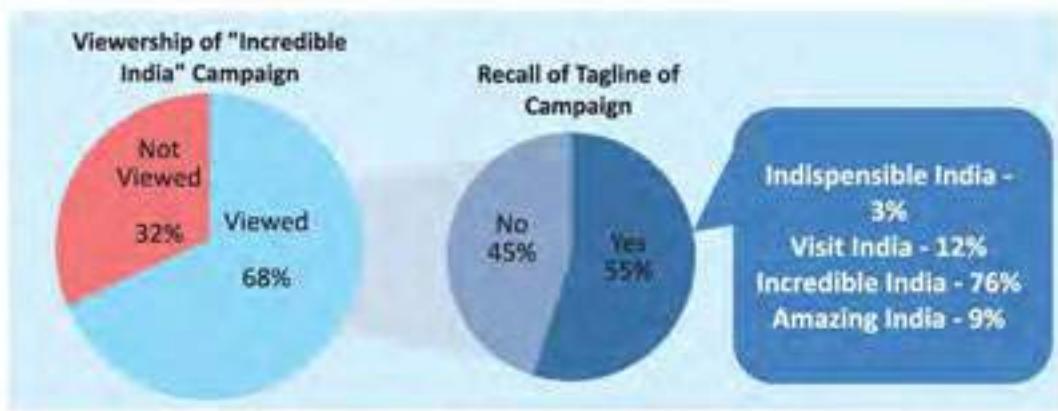
Phase II of the study aimed to assess their effectiveness in building India's image as a future tourist destination and impact on traveller's decisions travelling abroad in the coming one year. The Phase I findings reveal that the campaigns were rated as excellent in terms of quality, theme and appearance with the overall perception being rated as good. The Phase II findings point outwards a positive impact of Incredible India campaigns on the targeted masses although the same has not translated into immediate travel bookings to India. Opinions of tour operators and travel agents operating in these countries was also taken on specific measures to be taken to promote India there, inadequacy in the publicity and marketing strategy of India in attracting the tourists, etc.

The Source Country – wise detailed findings of Phase I and Phase II of the Study and summary of opinions of the tour operators and travel agents are given in the following sections:

Australia

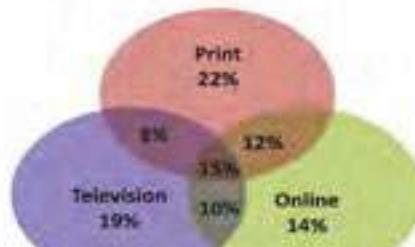
Phase I findings:

A total of 1062 travellers, who had undertaken international travel in the past, were interviewed out of which 57% had travelled to India. 68% of the total respondents had seen "Incredible India" campaigns. Out of the 68% who had viewed the campaigns, 55% could recall the tagline of the campaign and out of them 76% could recall the tagline of "Incredible India" exactly.



Advertisement viewing medium:

22% of the viewers saw the advertisements in the print media, 14% saw the advertisements only online and 19% only on television. 15% of the total viewers saw the advertisements in all the three mediums of print, television and online.



BBC (15% views), National Geographic Channel (15% views) and Travel Channel (14% views) were the TV channels where the video advertisement was most viewed. Amongst print media, the Sunday Magazine (15.2% views) and the Weekend Australian Magazine with 14.8% views were the magazines where the print advertisements were viewed most. YouTube (22.6% views), followed by Yahoo (20.8% views) were the websites where the advertisements were most viewed.

Opinion on advertisements:

In the print and online media, all the aspects of the print advertisements (appearance, content, quality, visibility and overall appearance) were rated as good by majority of respondents. In the television, all the aspects of the advertisements apart from timing were rated as good. 41% of the total respondents mentioned that appropriateness of the timing of the advertisement in television was found to be average.

The respondents who viewed the advertisements, irrespective of the medium felt that the advertisements had contemporary design & styling, an attractive & youthful concept, presented the diversity of India and was forceful and touching.

Striking aspects of advertisements:

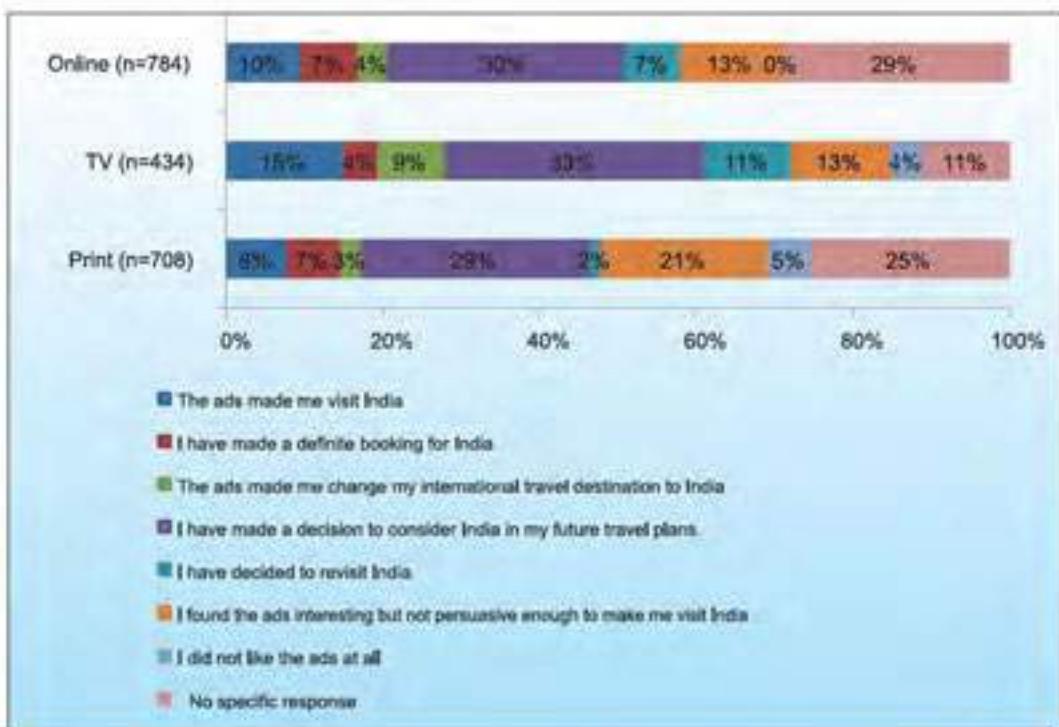
The most striking aspect of the advertisements irrespective of medium was found to be the beauty of the destinations followed by the concept of the advertisement.

Phase II findings:

In phase II of the study a total of 952 persons, who were planning to make international travel in the coming one year were interviewed. 26% of respondents had decided to visit India and the remaining had decided to visit other countries. 8% respondents had decided to visit India after watching the advertisements.

Impact of campaigns on decision making of travelers:

29% of the print media viewers had made a decision to consider India in their future travel plans after viewing the advertisement. 33% of the respondents who watched the advertisements in television and 30% of the respondents who watched the advertisements online too had made a decision to consider India in their future travel plans.



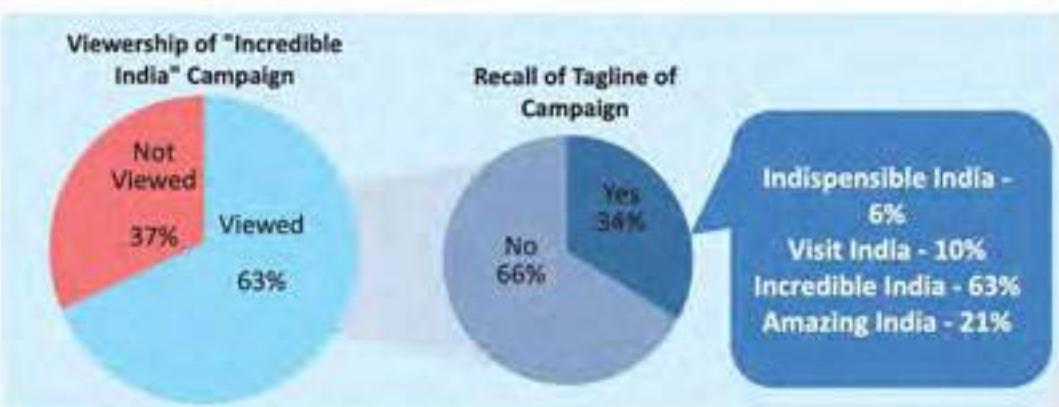
Inputs of tour operators and travel agents:

The tour operators feel that the brand of "Incredible India" is very strong in Australia and opined that the promotional campaigns need to be stepped up and become more main stream. The tour operators were also of the opinion that a price point needs to be present in the advertisement as in the current price sensitive times, the price of the destination is more important than the destination itself.

France

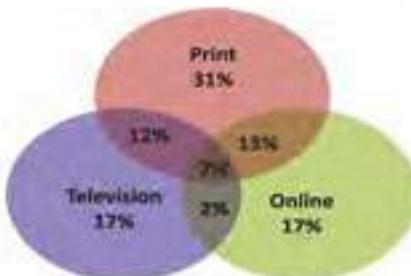
Phase I findings:

In phase I of the study a total of 1057 travelers, who had undertaken international travel in the past, were interviewed. 63% of the total respondents had seen "Incredible India" campaigns. Out of the 63% who have viewed the campaign 34% could recall the tagline of the campaign and out of them 63% could recall the tagline of "Incredible India" exactly.



Advertisement viewing medium:

31% of the respondents saw the advertisements in the print media only. 17% of the respondents mentioned that they saw the advertisements only online and 17% only in television. 7% of the respondents saw the advertisements in all the three mediums of print, television and online.



BBC (15% views) followed by National Geographic (10% views) were the channels where the video advertisement was most viewed. Amongst print media 'Le Nouvel Observateur' was the magazine where the most views (19.2%) were reported and You Tube (21.3% views) followed by Facebook (19.7% views) were the websites where the online advertisements were most viewed.

Opinion on advertisements:

Amongst the different aspects of advertisements, in the print media the visibility (45%), appearance (47%), quality (47%) and overall feeling (52%) about the advertisements were reported as good. In television, the content of the advertisements was rated as excellent; however, the appropriateness of the timing of the advertisements was rated as average. In the online media quality, appearance and overall feeling of the advertisement were rated as good. It was also found that the respondents who had viewed the advertisements felt that the advertisements had contemporary design & styling, an attractive & youthful concept, presented the diversity of India and was forceful and touching.

Striking aspects of advertisements:

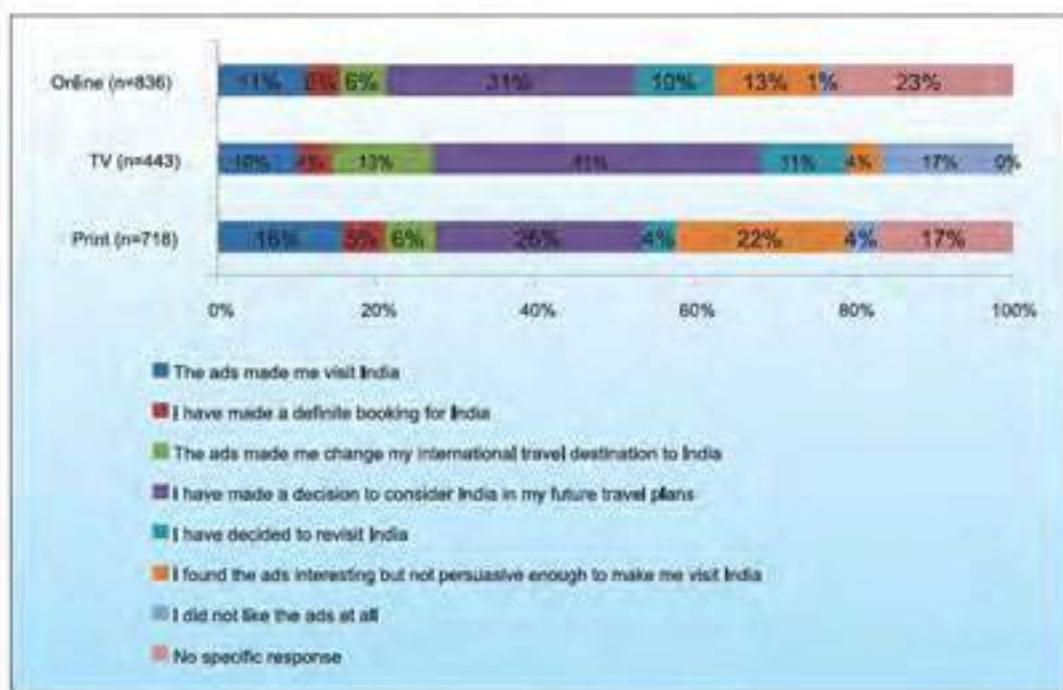
The most striking aspects of the advertisements, irrespective of the medium, were found to be beauty of the destinations and the concept of the advertisement.

Phase II findings:

In phase II of the study a total of 954 travelers who were traveling abroad were interviewed in France. Of the total respondents 37% respondents had decided to visit India in the next one year and the remaining had decided to visit countries other than India in the next one year. 87% of the total 954 respondents said that they had seen "Incredible India" campaigns in the past.

Impact of campaigns on decision making of travelers:

The immediate impacts of the advertisements were found to be positive wherein 11%, 10% & 16% (in online, television and print medias, respectively) of respondents said the advertisements made them visit India. 26% of respondents who viewed the advertisements in the print medium said they have made a decision to consider India in their future travel plans after viewing the advertisement. 41% of respondents who had watched the advertisements on television and 31% of respondents who had watched the online campaign said that they have made a decision to consider India in their future travel plans. Of the total respondent viewership in online, television and print formats, 6%, 13% and 6% of respondents said the advertisements made them change their travel destinations to India in the coming one year.



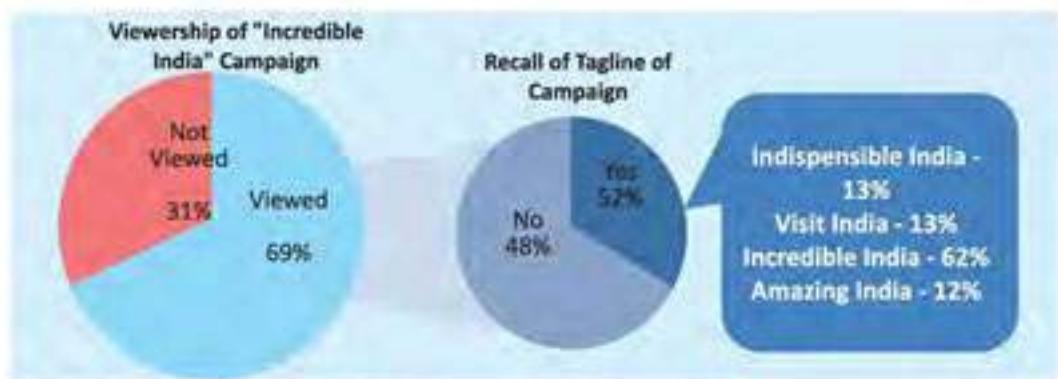
Inputs of tour operators and travel agents:

The tour operators and travel agents in France felt that awareness about India as a tourist destination is very low. The French nationals do not know what all India has to offer as tourist destinations apart from a few destinations like Taj Mahal, etc. Ministry of Tourism, Government of India should advertise in local magazines (IN French) and local French channels. Aversion to English as language is prevalent in France; hence, communication in French is essential.

USA

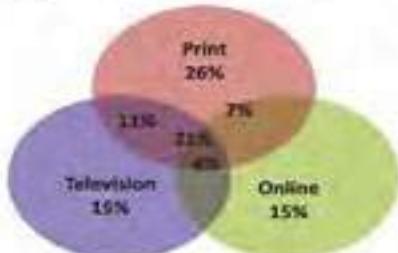
Phase I findings:

A total of 1058 travellers, who had undertaken international travel in the past, were interviewed. 69% of the respondents had seen "Incredible India" campaigns. Out of the 69% who have viewed the campaigns, 52% could recall the tagline of the campaign and out of them 62% could recall the tagline of "Incredible India" exactly.



Advertisement viewing medium:

26% of the total 1058 respondents saw the advertisements in the print media only. 15% of respondents saw the advertisements only online and the same percent saw them only on television. 21% of the respondents saw the advertisements in all the three mediums of print, television and online.



BBC (12% views) followed by Travel Channel (8% views) and CNN (8% views), were the channels where the video advertisement were most viewed. Amongst print media American Express publications, majorly Travel & Leisure magazine, were the one where the most views (14.1% views) of the print advertisements were reported by respondents. It was followed by the National Geographic Traveller with 7% views.

Opinion on advertisements:

In the print media, the appearance (41%) and quality (42%) of the advertisements were reported as excellent, the content (47%) and overall feeling about the advertisement (43%) of the advertisements were rated as good. In visibility, the advertisements were reported as average by majority (35%) of the respondents. In the television, the quality (37%) was the only aspect that was rated as excellent. The duration of the advertisements (48%), content (37%), appropriateness of timing (39%) and overall feeling about the advertisements (50%) were rated as good. In the online media quality (40%) of the advertisement was rated as excellent, whereas, appearance (39%), content (43%), visibility (38%) and overall feeling (40%) about the advertisement were rated as good.

The respondents who viewed the advertisements, irrespective of the medium they viewed it in, felt that the advertisements had contemporary design & styling, had an attractive & youthful concept, presented the diversity of India and was forceful and touching.

Striking aspects of advertisements:

The most striking aspects of the advertisements, irrespective of the medium, were found to be beauty of the destinations and the concept of the advertisement.

Phase II findings:

The phase II of the study was carried out among 955 travellers who planned to travel abroad in the coming year. 93 % of the respondents said they have watched at least one the Incredible India campaigns in the past few months while 7% of the travellers had not watched any advertisement but were still travelling to India.

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Impact of campaigns on decision making of travelers:

After viewing the print advertisements, 21% out of 767 respondents have said they will consider India as a destination in their future travels. Respondents who had watched the television advertisements 33% out of 567 said that they would consider India as a future travel destination. Out of the respondents who viewed the advertisements in the online medium, 31% of 890 respondents mentioned that will be considering visiting India in the future after seeing the advertisements.



Inputs of tour operators and travel agents:

The tour operators and travel agents felt that awareness about India is present but not as a regular tourist destination. Visibility of India is not enough. The association between the trade and the Ministry of tourism may be strengthened because it is the trade which connects to the consumer and unless the trade is educated, made familiar with the destinations (its pros & cons), made aware about the new India, it shall be difficult to remove the myth that it is an expensive destination.



11

Chapter

Atithidevo Bhava



Incredible India

**FINANCIAL ASSISTANCE PROVIDED BY TOURISM
FINANCE CORPORATION OF INDIA (TFCI)**



FINANCIAL ASSISTANCE PROVIDED BY TOURISM FINANCE CORPORATION OF INDIA (TFCI)

Tourism Finance Corporation of India Ltd. (TFCI) is a premium All-India Financial Institution promoted by IFCI and other Institutions and Banks as a specialized Institution to cater to financial requirements of the tourism industry. The corporation commenced its journey on 1st February 1989 and since then has been providing financial assistance for new, expansion, diversification/modernization of projects to enterprises, for setting up and/or development of tourism-related activities, infrastructure sector, industrial/manufacturing sector, real-estate sector, service sector and related activities and facilities in the form of Rupee Term Loan, Rupee Loan for Corporates, Advances against Credit card receivables, Working Capital Finance, Bridge Loan, Takeover financing, Promoters financing against adequate substantive security, Subscription to equity/debenture, Guarantee of deferred payment etc..

TFCI provides all forms of financial assistance to projects like hotels, restaurants, holiday resorts, amusement parks and complexes for entertainment, education and sports, safari parks, rope-ways cultural centers, convention halls, all forms of transport industry, air taxies, travel and tour operating agencies, tourism emporia, sports facilities etc. Besides, TFCI also co-ordinates and formulates guidelines and policies related to financing of such projects.

TFCI also provides high-quality research and consultancy services to the tourism industry in general and to the investors in tourism industry in particular. In line with this, TFCI has been rendering consultancy services to the different central and state agencies by undertaking broad based assignments to cover macro & micro level tourism related studies/exercises to facilitate identification, conceptualization, promotion/implementation of specific tourism related projects and for taking policy level decisions with respect to investment and infrastructural augmentation etc. TFCI offers project/tourism-related services right from the "Concept" to "Commissioning".

The details of the amount of loan sanction and disbursed by the TFCI to various categories of tourism industries during 2012-13 and 2013-14 the project-wise classification of financial assistance sanctioned during 2013-14 are given in table 11.1.1 and 11.1.2 respectively.

TABLE 11.1.1
Assistance Sanctioned and Disbursed by TFCI Ltd. during
2012- 2013 and 2013- 2014

(₹ in Lakh)

Operations	Assistance Sanctioned		Assistance Disbursed	
	2012-13	2013-14	2012-13	2013-14
Rupees Loan	36680	68086	28643	35463
Leasing	Nil	Nil	Nil	Nil
Subscription to Equity/Preference Share/Mutual Fund/Debenture	5668	8624	5668	8624
Total	42348	76710	34311	44087

Table No. 11.1.2
CUMULATIVE FINANCIAL ASSISTANCE PROVIDED BY TOURISM FINANCE
CORPORATION OF INDIA LIMITED (TFCI)

(₹ in Lakh)

Purpose	New		Expansion		Renovation/ Equip. Finance		Expansion/ Acq/ Restrc/Reno.		Total	
Type of Project	No.	Amount	No.	Amount	No.	Amount	No.	Amount	No.	Amount
5 STAR HOTEL	78	137575	16	17876	15	6808	27	53377	136	215636
4 STAR HOTEL	45	62746	6	7457	5	1995	4	1590	60	73788
3 STAR HOTEL	250	142392	22	12587	11	3743	39	24907	322	183629
2 STAR HOTEL	24	10338	1	388	1	90	2	323	28	11139
HERITAGE	17	3764	3	1030	2	425	2	586	24	5805
UNCLASSIFIED	2	1210	0	0	1	24	1	56	4	1290
AMUSEMENT PARK/	34	31183	3	190	0	0	4	1417	41	32790
SHOPPING COMPLEX-C UM-ENT. CENTRE/ WATER PARK/MULTIPLEX/ ACTIMTY CENTRE/										
INTEGRATED RESTAURANT	16	5544	3	1835	3	109	2	1805	24	9293
TOURIST CARS/COACHES	2	241	3	1326	2	600	1	5000	8	7167
RTDC/PALACE ON WHEELS	2	2150	0	0	1	1000	1	500	4	3650
OTHERS	34	43085	3	3600	3	5273	21	55815	61	107773
INFRASTRUCTURE PROJECTS	2	6300	1	3000	0	0	2	4500	5	13800
TOTAL	506	446528	61	49289	44	20067	106	149876	717	665760