In this chapter an attempt has been made to recapitulate and summarise the findings of the study with a view to providing a basis for the policies that should be formulated for the growth and development of Heritage Tourism in Kerala. The summary of findings and conclusions of the study on Heritage Tourism in Kerala are presented in this section.

The basic information pertaining to various aspects of tourism in general and Heritage Tourism in Kerala is particular were gathered from primary and secondary sources. The survey among domestic and foreign tourists, officials of tourism department and the representatives of tour operators enabled the investigator to gather first hand information in this regard.

5.1. Secondary data gathered from various sources revealed that 23.57 per cent of foreign tourists to Heritage spots in Kerala arrived from UK, 8.72 per cent from France, 7.26 per cent from the USA and another 7.26 per cent from Germany. 41 per cent of them are professionals, 23 per cent businessmen, and 12 per cent are students. 30 per cent of those
interviewed are above 55 years of age another 29 per cent were are in 45-55 age group and another 21 per cent in the age group of 35-45.

5.2. It is found from the primary data that for vast majority of the foreign tourists, it was an enchanting and educative experience. The advent of home stays, attitude of the local inhabitants, professionalism of service providers, and the favorable climate were found appealing to majority of the tourists.

5.3. Poor or inadequate linkage of rail and road, poor quality of publicity and marketing, incidence of multiple tax and aggressive political climate were not liked by majority of them.

5.4. Majority of the officials consider upkeep and maintenance of heritage and culture more important than employment creation and foreign exchange earnings.

5.5. Majority of the tour operators consider government in the role of a facilitator in tourism industry. They propose leasing or contracting to private sector.

5.6. Arrival rate and other related matters of various class of tourists, based on the secondary data, is presented in this section.

5.6.1. Arrival rate of domestic tourist’s in Kerala was consistently ascending from 2005 –’09.

5.6.2. Thrissur district with an average intake of 1,28,405 domestic tourists came ahead of other districts and Pathanamthitta district with 5221 accounted
for the minimum number, across the period under review. In respect of the level of consistency Alappuzha district came ahead of others.

5.6.3. Ernakulam district with an average intake of 13,967 foreign tourists came ahead of other districts and Pathanamthitta district having 36 accounted for the minimum number. Regarding the level of consistency, Thiruvananthapuram district came ahead of other districts.

5.6.4. The general assessment about the number of foreign tourists arrived in the selected districts in Kerala across the study period made it clear that except for the year 2008 in Thrissur, in all other districts the frequency was found consistently ascending although the period under review.

5.6.5. The number of domestic tourist arrived during the period 2005-09 in other parts of the districts excluding towns showed a consistently ascending trend.

5.6.6. On a detailed evaluation about the performance of other parts of Thrissur district excluding the town across the period, revealed that consistently decreasing trend was observed from 2005-09 with regard to the number of domestic tourists arrived.

5.6.7. The average number of domestic tourists arrived in 2007 in the town area of the districts came to 28,494 with extreme figures of 1,16,823 in Thrissur and 2,859 in Pathanamthitta showing wide variation in between the districts.
5.6.8. On a detailed evaluation about the performance of Thrissur district across the period, it was found that consistently increasing trend was observed from 2005-09 with regard to the number of domestic tourists arrived in the town.

5.6.9. The general assessment about the number of domestic tourists arrived in the town area of selected districts in Kerala, across the study period, made it clear that all the districts except Thrissur showed a varying trend. Thrissur showed an increasing trend.

5.6.10 The number of Domestic heritage tourists arrived in Kerala showed a consistently ascending trend from 2005-2008, and the year 2009, showed a descending trend. The evaluation based on Coefficient of Variation came to the conclusion that the level of consistency observed regarding the number of domestic heritage tourists arrived in different districts in Kerala was considerably low.

5.6.11 The general assessment about the number of domestic heritage tourists arrived in the selected districts in Kerala across the study period made it clear that, except the year 2009 in Thiruvananthapuram, in all other districts the frequency was found consistently ascending through the period under review.

5.6.12 The number of foreign heritage tourists arrived in each district made it clear that Ernakulam district with an average of 2374 came ahead of other
districts. Palakkad district having 4 accounted for the minimum number in this regard.

5.6.13. The number of foreign heritage tourists arrived in Ernakulam district revealed a consistently increasing trend during the period 2005-’09. The performance of Thiruvananthapuram district regarding the number of foreign heritage tourists arrived from 2005 to 2009 indicated a consistently upward trend from 2005 –’08 and a decline in 2009. Wayanad district showed an increasing trend of domestic tourist visit during the period of 2005-’08, and a slight decline during the year 2009.

5.6.14. The general assessment about the number of foreign heritage tourists arrived in the selected districts in Kerala across the study period made it clear that except the year 2009 in Thiruvananthapuram the frequency was found consistently ascending although the period under review.

5.7. The particulars, both from primary and secondary source, relating to the tourists at heritage centres in Kerala, are narrated in this section.

5.7.1. High growth rate is observed in the inflow of domestic tourists during the study period, and 24.19 per cent of them were from Andhra Pradesh and another 22.86 per cent from Utter Pradesh.

5.7.2. When a higher number of domestic tourists are in the age group of 30 – 40, representation from youth was very low.
5.7.3. Most of the tourists were with high educational background and they consider Kerala as a leisure destination.

5.7.4. When vast majority of the tourists appreciated restaurant services, banking and shopping facilities and quality and price of food and beverages, most of them were not happy with the cleanliness and adequacy of basic amenities at heritage tourist centres in Kerala.

5.7.5. Among the major heritage destinations as identified by the officials of tourism department and the tour operators, Fort Kochi, Mattancherry, Willingdon Island, Hill Palace and Padmanabhapuram Temple are visited by almost all foreign and domestic tourists alike. Temples and Palaces in Thiruvananthapuram area, Temples and Palace in Edappally, Thrikkakara, Kanakakkunnu and Kuthirakmalika were visited by nearly 80 percent of the tourists. Various Integrated Heritage Zones in Kochi and suburbs, Vadakkumnathan temple, Sreechitra Art Gallery, Natural Museum building, University College Compound, Churches, Mosque, Temples, Christian settlement, Churches, Napier Museum, etc are visited by almost 60 percent of the foreign and domestic tourists. The other designations are not visited by all.

5.7.6. It is observed that even the beautiful historical monuments dating back to 8-9th century AD presenting the Chola, Dravidian and Pandian architecture with elegant wood work, carvings and murals, granite etc, were left unvisited by many of the tourists.
5.7.7. When religious reasons made some of the temples not freely accessible, Litigation and fights made some of the churches closed for visit. Though some of the churches and temples, which are notified as heritage centers were not visited by many; none of the labelled palaces caves and museums were left unvisited.

5.7.8. Most of the celebrated festivals are adequately marketed by the tourism department and tour operators, and has secured enough mileage on it. *Kummi* and *Kolkali* among the folk arts, *Yathrakali* and *Chavittunadakom* under the dance drama groups and *Thullal*, *Koodiyattom* and *Nangiyarkoothu* under the semi classical group of dances come under the threat of extinction.

5.8. The results of analysis with correlation and allied tools, relating to the earning and arrival rate of foreign and domestic tourists with possible subdivisions are presented in this section.

5.8.1. Relation between number of foreign tourist arrived (FTA) and the foreign exchange earnings (FEE) was rather high as evinced by correlation coefficient \((r = 0.9975)\). It is also observed that 99.51 per cent of the variation in FEE is being explained by the change in the number of FTA.

5.8.2. Relation between number of Domestic Tourist Arrived and total yearly earnings was high \((r = 0.9551)\) and 91.22 per cent of the variation in earnings is being explained by the change in the number of DTA.
5.8.3. Relationship between number of DTA and annual direct earnings was high 
\( r = 0.9727 \) and 94.63 per cent of the variation in annual direct earnings is 
being explained by the change in the number of DTA.

5.8.4. Relationship between number of DTA and yearly indirect earnings was high 
\( r = 0.9306 \) and 86.60 per cent of the variation in yearly indirect earnings is 
being explained by the change in number of DTA.

5.8.5. The degree of relationship between number of DTA and the corresponding 
direct quarterly earnings was rather high \( r = 0.9046 \) and 81.84 per cent of 
the variation in the direct quarterly earnings is being explained by the 
change in the number of DTA.

5.8.6. Relationship between number of DTA heritage tourism centres and yearly 
direct earnings was high \( r = 0.9932 \) and 98.65 per cent of the variation in 
direct yearly earnings is being explained by the change in the number of 
DTA.

5.8.7. Relationship between number of DTA in heritage centres and the direct 
earnings in each quarter was absolutely high \( r = 0.9814 \) and 96.31 per 
cent of the variation in direct earnings in each quarter is being explained by 
the change in the number of DTA in heritage centres.

5.8.8. Relationship between number of FTA in heritage centres and direct 
quarterly earnings was high \( r = 0.9959 \) and 99.18 per cent of the variation
in the direct quarterly earnings is being explained by the change in number of FTA in heritage centres.

5.8.9. Relationship between number of FTA in heritage centres and the corresponding yearly direct earnings was high \((r = 0.9975)\) and 99.51 percent of the variation in early direct earnings is being explained by the change in the number of FTA in heritage centres.

The results of regression analysis of different variables, relating to the earning and arrival rate of foreign and domestic tourists with possible sub divisions are presented in this section.

5.9. The results of evaluation, based on Confidence interval estimates of slope is presented in this section.

5.9.1. Number of FTA and FEE when estimated with 95 per cent confidence level, the slope between Rs. 53920 and 69800 helps to read the conclusion that there is significant linear relationship between FEE and the number of FTA in Kerala during the study period. The slope between Rs. 11800 and Rs. 43195 indicated that there is significant linear relationship between total yearly earnings in rupees and the number of domestic tourist arrived in Kerala during the study period.

5.9.2. When DTA and annual earnings are compared, the estimate at 95 per cent confidence level, having a slope ranging from Rs. 7890 and Rs. 20170 indicated that there is significant linear relationship between direct yearly
earnings in rupees and the number of domestic tourist arrived in Kerala during the study period. The slope between Rs.3740 and Rs. 23230 at 95 per cent confidence level established the strong relation between annual indirect earnings and the number of DTA.

5.9.3. When the estimate is made with 95 per cent confidence level, for a slope between Rs.8689 and Rs. 13970 the relation is found significant between direct quarterly earnings and the number of DTA. The slope between Rs.9678 and Rs. 14961, confirmed that there is significant linear relationship between direct yearly earnings and the number of DTA at heritage centres in Kerala.

5.9.4. When the estimate is made with 95 per cent confidence level and the slope is between Rs.10804 and Rs. 13123, significant linear relationship between direct earnings in each quarter and the number of DTA can be very well established. Since the slope is between Rs.51453 and Rs.56308, it is presumed that there is significant linear relationship between direct quarterly earnings and the number of FTA at the heritage centres in Kerala.

5.9.5. When the slope is between Rs. 50265 and Rs. 65303 it is safe to conclude that there is significant linear relationship between annual direct earnings the number of FTA at the heritage centres in Kerala during the study period.
5.10. The results of evaluation, based on Intercept and slope is presented in this section.

5.10.1. The Regression analysis when based on average annual figures came to the conclusion that for general tourism, a unit change in number of tourist will yield Rs. 61870 from foreign tourists and Rs. 27514 from domestic tourists.

5.10.2. Regarding Heritage tourism, the analysis based on average annual figures, indicated that a unit change in number of tourist will yield Rs. 57784 from foreign tourists and Rs. 12320 from domestic tourists. Regression analysis when based on average quarterly earnings indicated that a unit change in number of tourist the will lead to a progressive earning of Rs. 53881 from foreign tourists and Rs. 11963 from domestic tourists.

5.11. The results of time series analyses relating to the seasonal indices pertaining to foreign and domestic tourists are presented in this section.

5.11.1. Time series analysis, with the help of seasonal indices revealed that the months of October, November, December and January were regarded as peak months of visit for domestic tourists and months of June, July and August are the lean period, in general.

5.11.2. In Ernakulam and Thiruvananthapuram the seasonal index was found to be more or less steady across every month, during the period under review.
5.11.3. It was found that during the month of April and May the number of domestic tourist arrival in almost all districts was rather high and the rate was comparatively more in Idukki, Waynad, Thrissur, Palakkad and Kozhikode.

5.11.4. The analysis, with the help of seasonal indices revealed that the months of November, December and January, February and March were regarded as peak months of visit for foreign tourists and months of June, July and August are the lean period, in general.

5.12. The results of Seasonality Index analysis relating to foreign and domestic tourists are presented in this section.

5.12.1 Arrival of foreign tourist is concentrated more in January-March season (148.53) and October –December season (122.21). The lean period being July- September (69.42) and April-June (59.84).

5.12.2. Regarding domestic tourist, the variations between seasons are not very wide. Oct-Dec season (111.33) and April June season (101.12) represents a higher coefficient, which is due to the effect of summer and Xmas vacation period.

5.12.3. The trend observed in general tourism, both for foreign tourist and domestic tourist and that observed in heritage centres does not vary significantly.

5.12.4. Foreign tourist arrival concentrated to January-march (148.97) and October – December (124.31). The lean period recorded being April-June (57.71) and July- September (69.01)
5.12.5. Domestic tourist arrival is found to be concentrated in October-December (108.23) and April-June (101.4). However, the flow to heritage centres during January-March (96.88) and July-September (93.49) is not found fluctuating widely from that in the peak period.

5.13. Based on the statistical assessments made individually on yearly and quarterly earnings, it is inferred that the first hypothesis mainly there is direct relationship between the earnings realised and the number of tourist arrived, and it does not vary significantly between domestic and foreign tourists stands accepted.

5.14. Based on the statistical assessments made individually on yearly and quarterly earnings, from domestic and foreign tourist in heritage centers, it is concluded that there is significant linear relationship between these variables. And the same is moving in the same direction as far as domestic tourists and foreign tourists are concerned. And hence the hypothesis namely the relationship existing between the number of domestic tourist arrived in heritage centres and the corresponding yearly direct earnings from domestic tourist are not in the same direction is found rejected.

5.15. This section discusses the likely prospects emerging from various proposals under the consideration of the government and other agencies.
5.15.1. Proposal of ‘holistic approach’ in tourism sector offers wide potential for employment creation and community. With strong legislative support and policy integration it could improve much in the years to come.

5.15.2. Infrastructure and development support offered by the Ministries of Railways, Surface Transport, Shipping, Civil Aviation, Urban Development, Rural Development, Environment and Forests is capable enough to widen the horizon.

5.15.3 The 2011 budget, with a target of 760 million gives better thrust on tourism. Fund allotment for KTDC Hotels, Resorts, Kerala Travel Mart activities, Muziris Heritage Project, Fort Kochi – Mattancherry conservation and Thalassery Heritage projects will enhance the coverage and mileage evolved from tourism operations.

5.15.4. Proposal to introduce websites, online presence, social media platforms like face book and twitter, influential blogging, Search Engine Optimization (SEO) is a welcome addition to this venture.

5.15.5. Steps to complement international travel with domestic travel will boost up the operational efficiency of tourism.

5.15.6 Initiatives to popularize and retain the extinct performing art forms and steps to increase approved quality accommodation units are capable enough to improve the quality of business in tourism sector and the employment potential.
5.15.7 The proposed projects like hotels on the surplus land near International Airports, budget hotels at specified Railway Stations will increase the volume of tourism business, income generation and revenue to the government.

5.15.8 Creation of Land Banks and Single Window facility for the investors in tourism projects indeed will inspire the investors in tourism from India as well as abroad.

5.16 Age-wise classification of the domestic tourists indicated that number of youngsters visiting heritage tourist centers is found to be low. The survey reports identified the ineffectiveness of tourist promotion strategies brought in by the government as well as private agencies.

5.17 Many of the domestic tourists held the view that domestic tourists are usually kept away from the orbit while designing and implementing strategies and network by various agencies including the government.

5.18 Publications and other tourist information given by concerned department are not adequate, both in quality and coverage. Most of the tourist information centers run by the government agencies have to get improved a lot, at least to meet the national standards.

5.19 Though India is a potential destination of the world for its rich natural and cultural heritage, at the international level it has only a dismally poor share. Majority of the domestic tourists selected Kerala as a leisure destination and
Kerala Tourism Department has not succeeded much in revealing the culture and heritage to the tourists.

5.20. It is observed from the survey that majority of the domestic tourists are more attracted by beaches, back waters, hill stations and wild life in Kerala, than by the heritage or culture. This in effect shows that the concerned departments are not able to attract more travellers to this segment with the existing mode of marketing or sales promotion.

5.21. Communication network of tourism department has not succeeded in extending appropriate information about various seasons, festivals and fairs in time to the prospective visitors from within and abroad.

5.22. Sufficiently available authentic publications with detailed information about various heritages, traditions and cultural wealth of Kerala are still a dream to many of the tourists from within and abroad.

5.23. It is not the shortage of heritage tourism spots but proper care and maintenance is practically missing in many of the heritage tourism spots in Kerala. International level facilities are very minimal in most of the heritage tourists’ centers, particularly when it is in rural area, away from towns and cities.

5.24. Survey among the government officials and tour operators does not indicate any evidence of having a clear cut heritage tourism policy to government of Kerala. Most of existing heritage tourist destinations, other than that under
the control of Archaeological Survey of India, are practically identified or fostered and marketed by tour operators in private sector.

5.25. Most of the heritage centers are vested with the government and the public, local administrative bodies and voluntary agencies have a minimal role in heritage management.

5.26. Most of the tour operators in private sector are not interested to make the tour schedule with much flexibility and to include most of the heritage sites in the surrounding area, in their package, for various reasons.

5.27. Most of the tour operators are reported to be very subjective in making a schedule in each package. They usually exclude many of the prominent heritage centers and many of the locally available performing arts from the schedule.

5.28. Many instances of lack of training to workers, staff and officials of tourism department are identified by the tourists. The survey results indicate that in most cases archaeological sites are found to be less attractive and practically no serious initiates have so far been made or materialized to rejuvenate the less attractive tourism spots and products.

5.29. There are no evidences to believe that heritage and cultural zones as visualized by the government and other agencies have effectively come into operation. Though archaeology and excavation are given due attention post-
excavation parts like storage, conservation, storage retrieval and timely display has to improve a lot, both in terms of outlook and technology.

5.30. Badly maintained Panchayath and district roads, inadequacy or absence of star hotels and KTDC hotels in heritage tourist centres, lack of cleanliness and hygiene are identified as critical issues associated with tourism in general and particularly with Heritage Tourism in Kerala.

5.31. Inadequacy, in terms of quantity and quality, of drinking water, comfort stations, restaurants, communication facilities are pointed out both by domestic and foreign tourists.

5.32. Inadequacy of trained licensed and experienced tourist guides, drivers and other supporting staff is another problem highlighted by many of the foreign tourists in this regard. Exploiting attitude of vehicle operators and taxi drivers are pointed out by many of the tourists.

5.33. Low profile performance of many DTPCs and limited scope for local spending are the frequent complaint raised by many domestic tourists.

5.34. Over domination of government, delay and absence in planning and implementation, inadequate fund allocation etc. are other inadequacies pointed out by many in the tourism sector.
RECOMMENDATIONS

In the light of the present study, the researcher proposes the following points by way of recommendation in order to strengthen Heritage Tourism in Kerala.

1. The survey informs that many heritage sites having historic and architectural elegance and monuments in various districts are not adequately preserved and promoted. Proper initiative to frame a commercially viable net-work of Heritage Centres shall come from each Local Authority to identify, foster, preserve and market the same effectively.

2. It seems ideal to think about proper Heritage Management Policies under integrated approach.

3. Strategic decisions from the concerned authority shall be made to accommodate more local people in decision making & implementation part of every Heritage Centre in the local limits, so that the common man will get involvement in Heritage Preservation schemes which in due course could minimize the loss of antiques.

4. Formal Education Schemes on heritage related topics, Formation of heritage preservation committees with the involvement of SHGs and other similar organizations could gradually prevent anti heritage practices from the local community.
5. Heritage (Tourism) study should necessarily be part of schools and college curriculum. Collaboration with NCC, NSS, Scout and guide or other similar clubs working in the nearby schools and colleges would be an added advantage to this venture.

6. A systematic survey is needed to identify prospective cultural zones and sites, which can be promoted as tourism products. Such cultural sites need to be documented so that planned, developmental activities can be carried out to make them tourism friendly, while at the same time preserving the heritage remains there.

7. Voluntary organizations could come forward to make value additions to the idle assets remaining with Archaeological Department by creating museums and organising cultural related exhibitions to market them accordingly.

8. It is ideal to think about introducing Cultural Resource Management in Heritage Tourism also (CRM).

9. An evaluatory study from Finance Management angle with adequate coverage for C-V-P analysis and Leverage analysis can be thought of.