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### Appendix I

#### TOURISM PRODUCTS OF KERALA

<table>
<thead>
<tr>
<th>No.</th>
<th>Description</th>
<th>No.</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Archaeological Museum.</td>
<td>36.</td>
<td>Flower show.</td>
</tr>
<tr>
<td>2.</td>
<td>Archaeological Centres.</td>
<td>37.</td>
<td>Granite sculptural work.</td>
</tr>
<tr>
<td>7.</td>
<td>Ayurvedic Centres.</td>
<td>42.</td>
<td>IRDP Fair.</td>
</tr>
<tr>
<td>8.</td>
<td>Academy for Literature.</td>
<td>43.</td>
<td>Islands.</td>
</tr>
<tr>
<td>10.</td>
<td>Academy for Arts and Crafts.</td>
<td>45.</td>
<td>Industrial Centres/Export Processing Zone.</td>
</tr>
<tr>
<td>17.</td>
<td>Beautiful natural sceneries.</td>
<td>52.</td>
<td>Meditation centres.</td>
</tr>
<tr>
<td>25.</td>
<td>Drama Centres.</td>
<td>60.</td>
<td>Handicraft centres.</td>
</tr>
<tr>
<td>29.</td>
<td>Estuaries.</td>
<td>64.</td>
<td>Spices Garden.</td>
</tr>
<tr>
<td>32.</td>
<td>Folklore.</td>
<td>67.</td>
<td>School, College Kalamela (Yuvajanotsavom)</td>
</tr>
<tr>
<td>33.</td>
<td>Fairs &amp; Festivals.</td>
<td></td>
<td>(District, Zone and State Level).</td>
</tr>
<tr>
<td>34.</td>
<td>Fish rearing centres.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>35.</td>
<td>Forest Research Institute.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
68. Temples, Temple architecture.
69. Theatre & Film, Film festival.
70. Tea plantations.
71. Tourist Resorts.
72. Tree Top house (Erumadom).
73. Village and cottage industries.
74. Village Panorama (Rural tourism).
75. Vedic Discourse.
76. Waterfalls.
77. Wildlife safari.
78. Wildlife Sanctuaries.
79. Watersports.
80. Yoga Practices.
81. Zoo.
## Appendix II
### Government Guest Houses in Kerala

<table>
<thead>
<tr>
<th>No.</th>
<th>House Type</th>
<th>Location</th>
<th>Telephone No.</th>
<th>Area Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Guest House Thiruvananthapuram</td>
<td>Thiruvananthapuram</td>
<td>0471 2329869</td>
<td>23</td>
</tr>
<tr>
<td>2.</td>
<td>New Guest House</td>
<td>&quot;</td>
<td>0471 2324453</td>
<td>23</td>
</tr>
<tr>
<td>3.</td>
<td>Guest House Kovalam</td>
<td>Kovalam</td>
<td>0471 2480146</td>
<td>23</td>
</tr>
<tr>
<td>4.</td>
<td>&quot; &quot; Attingal</td>
<td>&quot;</td>
<td>0472 2622290</td>
<td>23</td>
</tr>
<tr>
<td>5.</td>
<td>&quot; &quot; Varkala</td>
<td>&quot;</td>
<td>0472 2602227</td>
<td>23</td>
</tr>
<tr>
<td>6.</td>
<td>&quot; &quot; Ponmudi</td>
<td>&quot;</td>
<td>0472 2890230</td>
<td>23</td>
</tr>
<tr>
<td>7.</td>
<td>&quot; &quot; Kollam</td>
<td>&quot;</td>
<td>0474 2743620</td>
<td>23</td>
</tr>
<tr>
<td>8.</td>
<td>&quot; &quot; Kottayam</td>
<td>&quot;</td>
<td>0481 2562219</td>
<td>23</td>
</tr>
<tr>
<td>9.</td>
<td>&quot; &quot; Munnar</td>
<td>&quot;</td>
<td>04865 230385</td>
<td>23</td>
</tr>
<tr>
<td>10.</td>
<td>&quot; &quot; Peerumedu</td>
<td>&quot;</td>
<td>04869 232071</td>
<td>23</td>
</tr>
<tr>
<td>11.</td>
<td>&quot; &quot; Ernakulam</td>
<td>&quot;</td>
<td>0484 2360502</td>
<td>23</td>
</tr>
<tr>
<td>12.</td>
<td>&quot; &quot; Aluva</td>
<td>&quot;</td>
<td>0484 2623636</td>
<td>23</td>
</tr>
<tr>
<td>13.</td>
<td>Ramanilayam, Thrissur</td>
<td>&quot;</td>
<td>0487 2332016</td>
<td>23</td>
</tr>
<tr>
<td>14.</td>
<td>Guest House Malampuzha</td>
<td>&quot;</td>
<td>0491 2815207</td>
<td>23</td>
</tr>
<tr>
<td>15.</td>
<td>&quot; &quot; Malappuram</td>
<td>&quot;</td>
<td>0493 2734311</td>
<td>23</td>
</tr>
<tr>
<td>16.</td>
<td>&quot; &quot; Cheruthuruthy</td>
<td>&quot;</td>
<td>0492 2622498</td>
<td>23</td>
</tr>
<tr>
<td>17.</td>
<td>&quot; &quot; Kozhikode</td>
<td>&quot;</td>
<td>0495 2383920</td>
<td>23</td>
</tr>
<tr>
<td>18.</td>
<td>&quot; &quot; Sultanbathery</td>
<td>&quot;</td>
<td>0493 2620225</td>
<td>23</td>
</tr>
<tr>
<td>19.</td>
<td>&quot; &quot; Kannur</td>
<td>&quot;</td>
<td>0497 2706426</td>
<td>23</td>
</tr>
<tr>
<td>20.</td>
<td>Kerala House New Delhi</td>
<td>&quot;</td>
<td>011 23322100</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>011 23321644</td>
<td>23</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>011 23326191</td>
<td>23</td>
</tr>
<tr>
<td>21.</td>
<td>Kerala House Kanyakumari</td>
<td>&quot;</td>
<td>04652 246229</td>
<td>23</td>
</tr>
<tr>
<td>22.</td>
<td>&quot; &quot; Kasaragod</td>
<td>&quot;</td>
<td>0499 2430666</td>
<td>23</td>
</tr>
</tbody>
</table>
Appendix III
Organisation of Tourism, Ministry of Tourism & Civil Aviation, Govt. of India.

Minister

Dept. of Tourism.

ITDC

ICPB Hotels Division

Tourism, Hotel & Restaurants, Training Institutes

Secretary, Dept. of Tourism

Director - General of Tourism

Addl. Director - General

Jt. Director - General

Deputy Secretary

Deputy Director - Generals
(5 DDGs)

Planning Programming Division

Travel Trade Hospitality Division

Supplementary Accommodation, Wildlife Tourism Division

Publicity Promotion Marketing Division

Admin/Finance

Market Research

Dept. of Civil Aviation

Air India & Indian Airlines

Private Airlines

Airport Authority of India

Overseas Offices

New York
Los Angeles
San Francisco
Toronto

London
Frankfurt
Geneva
Milan
Brussels
Stockholm

Dubai
Bahrain

Sydney
Singapore
Kuala Lumpur

Osaka
Tokyo
Bankok

Appendix IV
Tourist Information offices of Kerala Government

The Department has a chain of 30 tourist information offices in Kerala. Out of which 14 comes under its direct control, 3 under the control of KTDC and 13 under DTPC. The following is the list of various Tourist Information offices.

OUTSIDE KERALA

17. Kerala Tourism Information Office, Dr.Shingaonkar Road, Panaji, Goa - 403 001, Ph: ++91-832-2232168.

KERALA TOURISM DEVELOPMENT CORPORATION (KTDC)

1. Tourist Reception Centre KTDC, Hotel Chaithram, Thampanoor, Thiruvananthapuram, Ph: ++91-471-2330031.
2. Tourist Reception Centre KTDC, Shanmugham road, Kochi, Ernakulam, Ph: ++91-484-2353234/2352199.
3. Tourist Reception Centre KTDC, Hotel Malabar Mansion, Kozhikode, Ph: ++91-495-2722391.

DISTRICT TOURISM PROMOTION COUNCIL (DTPC)

1. DTPC Tourist Information Centre, Thampanoor, Thiruvananthapuram, Ph: ++91-471-2330820/2330856.
2. DTPC Tourist Reception Centre, KSRTC Bus Stand, Kollam, Ph: ++91-474-2745625.
3. DTPC Tourist Reception Centre, Govt.Guest House Complex, Ashramam, Kollam, Ph: ++91-474-2742558.
4. DTPC Office, Pathanamthitta, Ph: 091+473-2601202.
5. DTPC Office, Alappuzha, Ph: ++91+477-2251796/2253308.
6. DTPC Office, Kottayam, Ph: ++91+484-2562315.
7. DTPC Tourist Information Centre, Old Munnar, Idukki
   Ph: ++91-486-2530679/2530682.

8. DTPC Tourist Information Centre, Old Collectorate Building,
   Park Avenue, Ernakulam, Ph: ++91-484-2371488.

9. DTPC Tourist Information Counter, Near Children's Park,
   Palakkad, Ph: ++91-491-2538996.

10. DTPC Tourist Information Centre, Malappuram,

11. DTPC Tourist Information Centre, Pookot and Kalpetta,
    Wayanad, Ph: ++91-493-2602134/2602712.

12. DTPC, Near Civil Station, Kannur,
    Ph: ++91-497-2706336.

13. DTPC Office, Civil Station, Kasargod,
    Ph: ++91-499-2430211/2430313.
Appendix V
Salient Features of Union Budget 2002-‘03 with respect to Tourism Industry

Tourism Industry and Union Budget 2002-03.

The plan outlay for tourism has been increased from Rs. 150 crore to Rs. 225 crores for the period 2002-03.

It is proposed to implement a comprehensive tourism development package.

Six tourism circuits would be identified for development to international standards during 2002-‘03. Special purpose vehicles will be permitted to raise resources from both private and public sectors for infrastructure development in these circuits.

World Heritage site of Hampi (North Karnataka) will be developed as an international destination for tourism, based on an integrated master-plan.

Expenditure tax on hotel will henceforth apply only to room charges and will be payable only where such charges are Rs. 3000 or more per day, as against the existing threshold of Rs. 2000 per day.

The deduction available under sec.80HHD of the IT Act in respect of foreign exchange earnings of hotel or tour operators will be enhanced to bring it in line with the deduction available to exporters under sec.80 HHC.

A deduction of 50% of the profits earned by units setting up and operating large convention centres will be allowed for 5 years under section 80-IB.

In view of the slowdown in the hotel industry, the Finance Minister has extended the exemption from service tax on services provided by hotel from 31-3-2002 to 31-3-2003.

He has also exempted customs duty on aeroplanes, helicopters, gliders, simulators of air planes, their parts and raw-materials and equipment for airports.
The greenfield airports would be developed with private sector participation in terms of availability of land and related infrastructure from state governments such airports would be exempt from Air Travel Tax and Foreign Travel Tax on departing passengers for projects located in states that charge sales tax on Aviation Turbine Fuel at central tax rates. Inland Air Travel Tax would also be exempt on air travel to and from North-Eastern states.

An advanced development fee would be charged by way of additional passenger service fee at the existing airports to help finance the greenfield airports. There would be levy of user development fee at the new airport, financial assistance and equity participation by the Airports Authority of India. The proposed new airports at Bangalore and Hyderabad would benefit from these concessions.

Government intends to upgrade international airports at Delhi, Mumbai, Kolkata and Chennai through long-term leasing with private sector management and investment. The leasing process would be completed in 2002-03.

**Union Budget for 2003-04.**

Hotel expenditure tax (10 per cent) abolished. But, Central Government introduced 8 per cent service tax on the foreign exchange billing of the tour operators, which means cost of all services provided as per a tour package will increase proportionately.
### Appendix VI Kerala Facts & Figures
(Formed on 1.11.1956)

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capital</td>
<td>Thiruvananthapuram.</td>
</tr>
<tr>
<td>Language</td>
<td>Malayalam.</td>
</tr>
<tr>
<td>Population</td>
<td>31838619 (Men 15468664 Women 16369955 as per 2001 census).</td>
</tr>
<tr>
<td>Density of population</td>
<td>819 persons per Sq.KM.</td>
</tr>
<tr>
<td>Religions</td>
<td>Hindu, Christian and Muslim.</td>
</tr>
<tr>
<td>Districts</td>
<td>14.</td>
</tr>
<tr>
<td>State Area</td>
<td>38855 Sq.KMs. (56% area occupied by the people and 44% being forests &amp; uncultivable lands).</td>
</tr>
<tr>
<td>Coastline</td>
<td>550 KMs.</td>
</tr>
<tr>
<td>Topography</td>
<td>Highland, Mid-land and Low land.</td>
</tr>
<tr>
<td>Rivers</td>
<td>41 West flowing and 3 East flowing.</td>
</tr>
<tr>
<td>State Animal</td>
<td>Elephant.</td>
</tr>
<tr>
<td>State Bird</td>
<td>The great hornbill.</td>
</tr>
<tr>
<td>State Flower</td>
<td>Kanikonna.</td>
</tr>
<tr>
<td>State Festival</td>
<td>Onam.</td>
</tr>
<tr>
<td>State Tree</td>
<td>Coconut.</td>
</tr>
<tr>
<td>Mountains &amp; Peaks</td>
<td>Fifty.</td>
</tr>
<tr>
<td>Highest Peak</td>
<td>Anamudi (2817 Metre).</td>
</tr>
<tr>
<td>Estuaries</td>
<td>27.</td>
</tr>
<tr>
<td>Lagoons (Kayal)</td>
<td>34.</td>
</tr>
<tr>
<td>Biggest Kayal</td>
<td>Vembanatt.</td>
</tr>
<tr>
<td>Longest river</td>
<td>Periyar.</td>
</tr>
<tr>
<td>Wildlife Sanctuaries</td>
<td>12.</td>
</tr>
<tr>
<td>National Parks</td>
<td>2.</td>
</tr>
<tr>
<td>Navigable length of backwaters &amp; Kayals</td>
<td>1960 KMs.</td>
</tr>
<tr>
<td>Tourist season</td>
<td>Non-seasonal, but peak between December and May.</td>
</tr>
<tr>
<td>Kerala’s own art forms</td>
<td>Kathakali, Koodiyattom, Krishnanattom, Mohiniyattom, Kalarippayattu, Thullal, Theyyam, Pulikali, Margomkali, Chavittunatakam etc.</td>
</tr>
<tr>
<td>Kerala Folklore</td>
<td>Folk tales, Folk arts, Folk songs and Folk festivals.</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------------------------------------------------------</td>
</tr>
<tr>
<td>Kerala Architecture</td>
<td>Domestic and Religious, Elegant Temple and church architecture.</td>
</tr>
<tr>
<td>Climate</td>
<td>Tropical climate dominated by the Monsoon winds.</td>
</tr>
<tr>
<td>Rainfall</td>
<td>Annually about 300 CM; but acute in June-July.</td>
</tr>
<tr>
<td>Temperature</td>
<td>March to May 38°C; December - January 27°C; and other months average 20 - 26°C.</td>
</tr>
<tr>
<td>Kerala Literacy</td>
<td>90.92%.</td>
</tr>
<tr>
<td>Kerala Borders</td>
<td>Karnataka (North), Kanyakumari (T.N) (South), Tamilnadu &amp; Sahyadris (East) and Arabian Sea (West).</td>
</tr>
<tr>
<td>Airports</td>
<td>3 international airports.</td>
</tr>
<tr>
<td>State Department of Tourism</td>
<td>Tourism Directorate, “Park View”, Opp: Museum, Thiruvananthapuram, Phone: 0471-2321132.</td>
</tr>
</tbody>
</table>
Appendix VII
Specimen Questionnaire

RESPONSE - SHEET

(Officials of DOT, KTDC, ITDC, other related departments, local bodies)

1. Name: 

2. Designation: 

3. Department: 

4. Age: 

5. Whether Male [ ] Male [ ] Female 

(Please tick, wherever necessary)

6. Is Kerala a ______ destination for tourism?
   a. [ ] Primary.
   b. [ ] Secondary.

7. Do you agree that tourism promotion requires a co-ordinated approach of all related departments?
   a. [ ] Yes. b. [ ] No.

8. In your view, which category of tourism is relevant in Kerala?
   a. Domestic. [ ] b. [ ] International.
   c. Both.

9. Do you agree that there must be a Master-plan, District-plan and Block-level plan for the promotion of tourism in Kerala?
   a. [ ] Yes. b. [ ] No.

10. Would you favour if local bodies are encouraged to promote tourism, particularly, rural or green tourism?
    a. [ ] Yes. b. [ ] No.
11. What is your opinion about the performance of District Tourism Promotion Councils?
   a. Excellent. □   b. Good. □
   □   c. Moderate. □   d. Poor.

12. Which tourism product would you suggest for developing international tourism in Kerala? Please specify your priority in the boxes as 1, 2, 3, 4.
   a. □  Beaches, Backwaters, Ayurveda.
   b. □  Mountain, hill station, wildlife, natural beauty.
   c. □  Cultural fairs, festivals, pilgrimage, arts and crafts, folklore.
   d. □  Monument, Museums, Zoo, sightseeing, Garden, National Park.

13. Do you find any problems of the following type affecting the tourism industry in Kerala?
   a. □  No effective management of the tourist potential.
   b. □  No serious publicity for tourism promotion.
   c. □  Facilities at tourist centres are seriously lacking.
   d. □  There is inter-departmental non-co-operation.
   e. □  All these.

14. What is your opinion on the following statements?
   (i) Government must develop, maintain and promote existing tourist centres
   a. □  Yes.   b. □  No.
   (ii) All new ventures aimed to promote tourism except in some restricted areas must be given to the Private Sector
   a. □  Yes.   b. □  No.
15. Do you agree that there are a good number uncared places in Kerala that can be developed for promoting tourism?

   a. [ ] Yes.   b. [ ] No.

If yes, please mention some of them.

16. Tourism, being a hospitality industry, Are the following needed to promote tourism?

   (i) training and development of the staff of the tourism department.
   (ii) settlement of disputes of tourists patiently.
   (iii) educate the taxi/auto drivers.

   a. [ ] Yes.   b. [ ] No.

17. Particular facilities at tourism centres can be provided in the following manner. Which one would you prefer?

   (Please specify your priority in the boxes as 1,2,3)

   a. [ ] Self-supporting basis.
   b. [ ] on contract basis with private entrepreneurs.
   c. [ ] on long term lease with advertisement monopoly to the party.

18. What is your view, if private sector is allowed to play more in promoting tourism.

   a. [ ] more and more infrastructure and labour can be created.
   b. [ ] Private sector will exploit the resources for their profit motive.
   c. [ ] It will be a loss to the government as it loses the control.

19. What type of tourism would you like in Kerala?

   a. [ ] tourism related with our culture.
   b. [ ] tourism which is environment friendly.
   c. [ ] tourism aimed at generating employment opportunities.
   d. [ ] tourism aimed at earning much foreign exchange.
   e. [ ] all these.
20. Even though, Kerala is immensely rich in tourism products, what is the basic reason for the slow growth of tourism in Kerala.

a. No systematic planning & implementation.
b. Required facilities are not provided.
c. No proper maintenance of the infrastructure takes place.
d. Staff of the DOT are not well trained.
e. Funds are inadequate.
f. All these.

21. Do you favour a thorough shake-up in the plan, policies, and programmes of the government as regards tourism promotion

a. yes. b. No.

22. Do you agree that we must have a festival calendar of Kerala for attracting foreign tourists?

a. yes. b. No.

23. Is there any significance to tourism by conducting special tourism week celebrations during Onam season by the government

a. yes. b. No.

24. What is your opinion about “Gaja mela” and special tourism programmes which take place at Trichur, Alappuzha and Thiruvananthapuram during January every year.

a. it is an expensive affair considering the return from it.
b. it is expensive, but it creates a lot of publicity for attracting foreign tourists.
c. It is an extravaganza and it can be supplemented by attracting foreigners to view important festivals, boat races and our cultural fete.

25. To what extent Human Resource Development Programmes in your organisation were effective for your job?

a. very effective. b. Good. c. moderate.
d. unsatisfactory.
26. What is your experience as far as human relations in your organisation between supervisory level and subordinate level.

a. [ ] very cordial.  
b. [ ] Better.

c. [ ] imposing nature.  
d. [ ] accusing nature.

27. Have you attended any seminar/symposia/workshop related to tourism.

a. [ ] yes.  
b. [ ] No.

If yes, please give brief details.

28. Do you agree that there must be Degree level/PG level tourism courses in Universities of Kerala

a. [ ] yes.  
b. [ ] No.

29. What type of publicity would you like for promoting international tourism?

a. [ ] website through internet.  
b. [ ] through international journals.

c. [ ] pavilion at world tourism expo.

d. [ ] advertisement through foreign TV channels.

e. [ ] all these.

30. Is the tax on Hotel bills excessive?

a. [ ] yes.  
b. [ ] No.

31. Since tourism is changing into eco-tourism, Agri-tourism, Green tourism, Rural Tourism etc, what type of accommodation shall be preferred by the foreign tourists.

a. [ ] star hotel room.  
b. [ ] Govt.IBS, Guest houses.

c. [ ] tourist cottages, resorts.  
d. [ ] private lodges.
32. If special fairs and festivals are organised by the government for promoting tourism, where shall such fairs & festivals be organised?

a. [ ] in rural areas.  
b. [ ] in cities.  
c. [ ] at State capitals.  
d. [ ] at KTDC complexes.

33. Why should they be organised at the particular place?

a. [ ] knowing the local culture.  
b. [ ] knowing the social life and interacting with people.  
c. [ ] for shopping purposes.  
d. [ ] for enjoying local arts, music, dance and crafts.

34. How can we motivate a foreign tourist to visit Kerala again or encourage his/her friends to visit India?

35. If strategic management is applied in the promotion of tourism in Kerala, Do you believe that the tourism industry would grow on a large scale in Kerala?

a. [ ] yes.  
b. [ ] No.
Appendix VIII
Specimen Questionnaire

RESPONSE-SHEET

(For Tour operators, Hoteliers, Owners of Tourist Resorts)

1. Name : 

2. Designation : 

3. Deptment/Company : 

4. Age : [ ] Male/Female.
   (Please tick wherever necessary)

5. Kerala is a destination for tourism.
   a. Primary. [ ]
   b. Secondary. [ ]

6. In your view, which category of tourism is to be promoted in Kerala ?
   a. [ ] Domestic.   b. [ ] International.   c. Both. [ ]

7. What should be the role of the Private Sector in the promotion of tourism in Kerala ?
   a. [ ] Identify, develop, and create infrastructure for tourism and act as facilitator.
   b. [ ] Act as Promoter and facilitator and provide necessary facilities at tourism centres.

8. What should be the role of the Government, in the promotion of tourism in Kerala ?
   a. [ ] Act as promoter and conduct national/international publicity for tourism.
   b. [ ] Create necessary infrastructure for tourism.
   c. [ ] Act as facilitator and provide necessary facilities at tourist centres.
9. Particular facilities at tourism centre, with private participation, can be provided in the following manner:— (Please specify your priority in the boxes as 1, 2, 3...........)
   a. [ ] on contract basis with private entrepreneurs.
   b. [ ] on long term lease with advertisement monopoly.
   c. [ ] on income sharing basis with the government.

10. What type of tourism would you like in Kerala?
   a. [ ] Tourism related with our culture.
   b. [ ] Tourism which is eco-friendly.
   c. [ ] Tourism aimed at generating more employment opportunities.
   d. [ ] Tourism aimed at earning much foreign exchange.
   e. [ ] All these.

11. Eventhough, Kerala is immensely rich in tourism products, what is the basic reason for the slow growth of tourism in Kerala?
   a. [ ] No systematic planning and implementation.
   b. [ ] Required facilities are not provided.
   c. [ ] No proper maintenance of the infrastructure takes place.
   d. [ ] Staff working in tourism sector lack sufficient training and development.
   e. [ ] Funds are inadequate.
   f. [ ] All these.

12. Since tourism is changing into Eco-tourism, Ayurvedic tourism, Back water tourism etc, what type of accommodation shall be preferred by the foreign tourists?
   a. [ ] Star hotel room.
   b. [ ] Tourist resorts, cottages.
   c. [ ] Private lodges.
   d. [ ] Government lBs, Guest houses.
13. Which of the following tourism products shall be very interesting to tourists in Kerala? (Please specify your priority)
   a. [ ] Monuments, Museums, Zoo, Art Gallery, Sight Seeing etc.
   b. [ ] Cultural fairs, festivals, pilgrimage, Arts & Crafts, Folklore etc.
   c. [ ] Mountain, Hill station, Wildlife, Natural greenery etc.
   d. [ ] Beaches, Backwaters, Ayurveda, Rural sight seeing etc.

14. Do you provide HRD programmes for the development of the staff in your organisation?
   a. [ ] Yes.  
   b. [ ] No.

15. How do human relations in your organisation exist between supervisory level and subordinate level.
   a. [ ] Very cordial.  
   b. [ ] Better.  
   c. [ ] Imposing & accusing.

16. Do you agree that systematic training of the staff is vital for achieving business results?
   a. [ ] Yes.  
   b. [ ] No.

17. Do you agree that there must be Degree level/P.G. level tourism courses in Universities in Kerala?
   a. [ ] Yes.  
   b. [ ] No.

18. What mode of publicity would you suggest for promoting international tourism in Kerala?
   a. [ ] through international journals.
   b. [ ] website through internet.
   c. [ ] Pavilion at World Tourism expo.
   d. [ ] Advertisement through foreign T.V. channel.
   e. [ ] All these.
19. Which class of tourists mostly visit Kerala?
   a. □ High income.   b. □ Middle income.
   c. □ Low income.

20. What kind of accommodation do they prefer?

21. What mode of transport is mostly used by the tourists in Kerala?
   a. □ Own vehicle.   b. □ Hired tourist vehicle.

22. Give your views regarding the tourist hospitality services in Kerala?

<table>
<thead>
<tr>
<th>Services</th>
<th>Excellent</th>
<th>Good</th>
<th>Moderate</th>
<th>Sub-standard</th>
</tr>
</thead>
<tbody>
<tr>
<td>a) Road Journey</td>
<td></td>
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<td></td>
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<tr>
<td>b) Location and construction style of the hotel.</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>c) Staff services at the hotel</td>
<td></td>
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<tr>
<td>d) Food &amp; Beverages supplied</td>
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<tr>
<td>e) Bar &amp; Restaurant services</td>
<td></td>
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<tr>
<td>f) Cleanliness &amp; Hygiene</td>
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<tr>
<td>g) Entertainment</td>
<td></td>
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<tr>
<td>h) Other Services like Postal, Banking, customs, immigration etc.</td>
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<td></td>
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<tr>
<td>i) Guide's Service</td>
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</tbody>
</table>

23. Give your opinion regarding tourism promotional services in Kerala;

<table>
<thead>
<tr>
<th>Services</th>
<th>Excellent</th>
<th>Good</th>
<th>Moderate</th>
<th>Sub-standard</th>
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<tbody>
<tr>
<td>a) Tourist information</td>
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<tr>
<td>b) Conducted tours</td>
<td></td>
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<td></td>
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<tr>
<td>c) Shopping facilities</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>d) Basic amenities</td>
<td></td>
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<tr>
<td>e) Recreational activities</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f) Security of tourists</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>
24. How many nights, on an average do tourists spend in Kerala?
   a. □ Less than 3 nights.   b. □ Between 3 to 5 nights.
   c. □ more than 7 nights.

25. Are tourist information facilities sufficient in Kerala?
   a. □ Yes.   b. □ No.

26. How do local people behave/interact/respond to the tourists?
   a. □ In a helpful and Polite manner.
   b. □ In a good manner.
   c. □ In an unfriendly and teasing manner.
   d. □ In an obstructing manner.

27. How can we motivate a foreign tourist to visit Kerala again or encourage his/her friends to visit Kerala?
   (Please write in brief)

28. Did you come across any of the following complaints by the tourists?
   (Please tick, if any)
   a. □ Price charged for services is too high.
   b. □ Tourist centres lack necessary facilities.
   c. □ No Cleanliness and hygiene.
   d. □ Menace of miscreants.
   e. □ No guides to accompany with.
   f. □ No sufficient tourist information.
   g. □ Tiedious road journey.
29. What is the Chief objective of your business?
   a. [ ] to maximise profits by reducing costs.
   b. [ ] to deliver the best possible services to the customers and win their confidence.
   c. [ ] to achieve market leadership.
   d. [ ] to maximise the wealth and financial power of the enterprise.

30. Do you have long-range planning and short-range planning in your business.
   a. [ ] Yes.  b. [ ] No.

31. Do you believe that strategic management is very much essential for the achievement of objectives?
   a. [ ] Yes.  b. [ ] No.
   if yes, please respond the following.

32. Do you have the following phases in strategic management?
   - Formulation of strategies.
   - Implementation of strategies.
   - Evaluation of strategies.
   a. [ ] Yes.  b. [ ] No.

33. How do you conduct resource planning & allocation during the implementation of the strategy?
   a. [ ] through strategic Management Department.
   b. [ ] through the planning Department.
   c. [ ] through the concerned Departments.
   d. [ ] through a specialised committee.
34. What methods are usually employed to evaluate the strategy?
   a. □ Quantitative criteria such as ROI, profitability, market share, growth rate etc.
   b. □ Quantitative Criteria such as Reputation of the enterprise, sound industrial relations, customer patronage etc.

35. What corrective measures would you adopt in case there is deviation from the target?
   a. □ Change in the organisational pattern.
   b. □ Revision of the objectives, standards, strategy.
   c. □ Necessary precautions are taken.
   d. □ All these.

36. Does the Strategy help accomplish the objective?
   a. □ Yes.
   b. □ No.

37. Does you employ ‘SWOT ANALYSIS’ in your business?
   a. □ Yes.
   b. □ No.

38. How do you employ ‘SWOT ANALYSIS’?
   a. □ Through own staff.
   b. □ Through hired management consultants.

39. What are your strengths & weaknesses on the following functions?

   **Marketing**

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>a. Strong sales force.</td>
<td>a. Weak sales force.</td>
</tr>
<tr>
<td>b. Excellent publicity.</td>
<td>b. Excessive publicity.</td>
</tr>
<tr>
<td>c. High quality service.</td>
<td>c. Staff is not quality conscious.</td>
</tr>
<tr>
<td>d. Close international contact.</td>
<td>d. Limited to domestic tourism market only.</td>
</tr>
<tr>
<td>e. Customer patronage and market leadership.</td>
<td>e. To fight with strong competitors.</td>
</tr>
</tbody>
</table>
FINANCE

a. [ ] large own funds.
   a. [ ] uses more borrowed funds.

b. [ ] best use of cash resources.
   b. [ ] Idle cash resources.

c. [ ] No working capital problem.
   c. [ ] there is working capital problem.

d. [ ] comfortable debt equity ratio.
   d. [ ] Debt-equity ratio unsatisfactory.

e. [ ] high credit rating.
   e. [ ] low credit rating.

f. [ ] low finance charges.
   f. [ ] high finance charges.

g. [ ] high profits & dividends.
   g. [ ] low profit earning capacity.

HUMAN RESOURCES

a. [ ] Well trained staff.
   a. [ ] Staff not so trained.

b. [ ] motivated human resources.
   b. [ ] poor morale.

c. [ ] cordial industrial relations.
   c. [ ] disharmony at different management levels.

d. [ ] effective HRD programme.
   d. [ ] weak HRD programmes.

MANAGEMENT

a. [ ] Top management with creative thinking.
   a. [ ] inefficient top management.

b. [ ] well trained & efficient managers.
   b. [ ] incompetent managers.

c. [ ] Decentralised authority.
   c. [ ] Centralised authority.

d. [ ] Plan-objective-control go hand-in-hand.
   d. [ ] No systematic management functions.
40. What are your threats & opportunities?

<table>
<thead>
<tr>
<th>Threats</th>
<th>Opportunities</th>
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</thead>
<tbody>
<tr>
<td>b. Recessionary trends in the economy.</td>
<td>b. Favourable change in domestic tourism.</td>
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<tr>
<td>c. Political instability.</td>
<td>c. Stable government supporting tourism.</td>
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<td>d. High cost of international publicity.</td>
<td>d. Joint publicity by the government and private entrepreneurs.</td>
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<tr>
<td>e. Market yet to pick up.</td>
<td>e. Locational advantages for expansion/diversification.</td>
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<tr>
<td>f. Shortage of skilled manpower.</td>
<td>f. Growing tourism market.</td>
</tr>
<tr>
<td>g. To fight with too many competitors.</td>
<td>g. Excellent computer software and internet facilities.</td>
</tr>
<tr>
<td>h. Lack of infrastructural facilities.</td>
<td>h. Availability of skilled &amp; trained manpower.</td>
</tr>
<tr>
<td>i. Poor fund position.</td>
<td>i. Sound financial position to invest in new projects.</td>
</tr>
</tbody>
</table>

41. Please give your suggestions here, for the promotion of tourism in Kerala.
Appendix IX
Specimen Questionnaire

RESPONSE - SHEET
(For Domestic and International Tourists)

1. Name :

2. Address :

3. Occupation/Position :

4. Age. Male/ Female.

5. Annual Income $/£/Rs.

(Please tick wherever applicable)

6. Kerala is a destination for tourism

7. How did you come to know about tourism attractions in Kerala?
   a. Own knowledge. b. Through friends/relatives.
   c. through Dept. of tourism, Govt. of India/Kerala.
   d. through travel agent. e. through trade fairs & tourism expo.

8. What is your purpose of visit to Kerala?
   c. Pilgrimage. d. Education.
   e. Others.
10. Do you have any one to accompany during travel?
   b. □ with family.
   c. □ with friends.
   d. □ with a guide.

11. How many nights do you spend in Kerala?
   a. □ Less than 3 nights.
   b. □ Between 3-5 nights.
   c. □ More than a week.

12. Which tourist attraction has impressed you very much?
   a. □ Back waters.
   b. □ Beaches.
   d. □ Hill station & Greenery.
   e. □ Museum & wildlife.

13. For travelling which mode of transport was used?
   a. □ Own vehicle.
   b. □ Hired tourist vehicle.
   c. □ Relied on conducted tours.
   d. □ Public transport.

14. Where do you prefer accommodation?
   a. □ Star hotel.
   b. □ KTDC hotel.
   c. □ tourist cottages.
   d. □ with friends/relatives.
   e. □ Tourist Home/Lodges.

15. Which room facility was availed by you?
   a. □ A/C Deluxe suite.
   b. □ A/C Deluxe.
   c. □ Non A/C Deluxe.
16. Give your views regarding the tourist hospitality services.

<table>
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<td>f) Cleanliness &amp; Hygiene.</td>
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</tbody>
</table>

17. Give your opinions regarding tourism promotional services.

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<th>Sub-standard</th>
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<td>b) Conducted tours.</td>
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<tr>
<td>c) Shopping facilities.</td>
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<tr>
<td>d) Basic amenities.</td>
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<tr>
<td>e) Recreational activities.</td>
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<tr>
<td>f) Security.</td>
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</table>

18. What is your view concerning price charged for various facilities/services

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<tr>
<th></th>
<th>Too High</th>
<th>High</th>
<th>Moderate</th>
<th>Cheap</th>
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<tbody>
<tr>
<td>a) Transport.</td>
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<tr>
<td>b) Accommodation.</td>
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<tr>
<td>f) Conducted tours.</td>
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<td></td>
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<tr>
<td>g) Recreation.</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>h) Tax on hotel bill.</td>
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</tr>
</tbody>
</table>
19. How did local people behave/interact/respond you?
   a. [ ] in a helpful and polite manner.
   b. [ ] in a good manner.
   c. [ ] in an unfriendly and teasing manner.
   d. [ ] in an obstructing manner.

20. While going for shopping, which Indian goods would you buy?
   a. [ ] Handicrafts.
   b. [ ] Gem & Jewellery.
   c. [ ] Spices.
   d. [ ] Coir Matting.
   e. [ ] Textiles.

21. Did you experience any of the following complaints?
   a. [ ] Absence of guides to accompany with.
   b. [ ] Exploitation by Taxi/Auto drivers.
   c. [ ] Menace of the miscreants.

22. Would you come again or encourage your friends and relatives to visit Kerala?
   a. [ ] Yes.
   b. [ ] No.

   If your answer is No, Why:-
   a. [ ] Price charged for services is too high.
   b. [ ] Tourist centres lack necessary facilities.
   c. [ ] No cleanliness and hygiene.
   d. [ ] Menace of miscreants.
   e. [ ] No Guides to accompany with.
Appendix - X

THE TEXT OF THE TOURISM DEPARTMENT, GOVT. OF KERALA
DRAFT
TOURISM VISION 2025

Tourism is a major phenomenon of the modern society, which has emerged as an economic activity of immense global importance. Perhaps there is hardly any other field of activity where so many people are involved directly or indirectly. Tourism has found a niche for itself as an effective instrument for generating employment, earning revenue and foreign exchange, enhancing environment preserving culture and tradition thereby facilitating overall development.

Tourism is the one of world's largest and fastest growing industries. In 1999, there were 657 million international tourist arrivals throughout the world, an increase of 3.2% over the preceding year and international tourist receipts reached US $455 billion, a 3.2% increase from 1995. There has been strong growth in foreign travel to developing countries during recent years and this trend is expected to continue.

Economic diversification and technological improvement has created a conducive environment for tourism development in the present age of globalisation. India and South East Asia have been gearing up to achieve significant progress in this field owing to a number of encouraging factors. India has vast geographical spread and great historical and cultural heritage, which are excellent condition for growth in this sector.

Main aim of Tourism Vision 2025 is to serve as a guiding force which will provide a clear vision and direction for optimising the tourism potential of the state in a sustainable manner.

KERALA-STATE-SALIENT FEATURES

Sandwiched between the Western Ghats and the Arabian Sea, Kerala is blessed with unmatched natural diversity that provides immense scope for tourism. Within her 38,863 sq. km, this virtual paradise holds almost all the tourist attractions of the world-serene beaches, enchanting backwaters, mist clad hills stations, lush forests, exotic wildlife, exciting trekking trails, scintillating waterfalls, extensive plantations, tropical islands, invigorating monsoons, Ayurvedic health centres, historic monuments, sacred pilgrim centres, magical festivals, spectacular art forms, splendid cultural heritage, spectacular boat races, spicy cuisine....... and everything else that enthralls a visitor.

A physical quality of life comparable to developed nations and almost fully literate population in this beautiful land are important factors that help transform Kerala into an important tourist destination. Moderate climate and the rich art and culture are positive factors to foster tourism development.

KERALA TOURISM-PRESENT SCENARIO

Started as a State Hospitality department in 1950s, the Department of Tourism came into being in 1960s. However the function of the department were confined to running of guest houses, upkeep of residential bungalows of Ministers and proving hospitalities and other arrangements for VVIPs. It was only during the 7th Plan that the tourism promotion activities found a place in the functioning of the Department of Tourism. Kerala Tourism has recorded remarkable growth in the last few years. The number of foreign tourists and domestic tourists visiting the state has crossed 2 lakhs and 50 lakhs respectively. The revenue generated in the economy of Kerala, due to tourism is estimated to be nearly Rs.4000 crores which is 6.29% of the State's GDP. Tourism has generated employment in Kerala to the tune of nearly 7 lakhs (based on a study by Tata Consultancy Services).

Kerala has emerged as the most acclaimed tourist destination of the country in the recent past. World Travel and Tourism Council has selected Kerala as a Partner State. National Geographic Travel after 2 years of research has chosen Kerala as one of the 50 must see destinations of a lifetime. Kerala has been stated as one of the 10 paradises of the World. The other acclaims received by Kerala Tourism include;
One of the 100 great trips for the 21st Century, by 'Travel and Leisure'.

One of the ten hot spots for the millennium, by 'Emirates Inflight Magazine' One of the best breakfast in the world, by 'Travel & Leisure', One of the ten love nests in India, by 'Cosmopolitan', One of the six destinations of the millennium, by 'Khaleej Times'.

Kerala has also been awarded the best performing State Award for the year 1999-2000, by 'Government of India' for achieving rapid growth, development and advancement in the tourism sector.

There have been a constant increase in the State plan allocation from Rs. 6.7 crores in 1994-95 to Rs. 40.00 crores in 2001-2002. The central allocation has also gone up from 2.1 crores in 1995-96 to Rs. 14.00 crores 2001-2002.

Government has declared tourism as an industry as far back as in 1986 and offers incentives and concessions to the industry to promote tourism products in the state and to attract private investment.

**TOURISM VISION STATEMENT**

To develop Kerala, the God's Own Country into an upmarket high quality tourist destination through optimal utilisation of resources with focus on conserving and preserving the heritage and environment and enhancing productivity, income, creating employment opportunities and alleviating poverty thereby making tourism the most important sector for the socio-economic development of the State.

**Tourism Vision Slogan**

"Conserve Culture and Promote Tourism"

**OBJECTIVES**

1. To make tourism, Kerala's core competency sector

Tourism has emerged as the global industry and has been played a lead role in economic growth. In Kerala Tourism has played a significant role in terms of employment and economic growth. In view of its potential in creating employment, enhancing production and productivity and contribution towards the development of the state, a growth model led by Tourism will take the state to the pinnacle of socio-economic development.

2. To generate employment and enhance productivity

Tourism in Kerala has recorded remarkable growth in the last few years. The number of foreign tourist and domestic tourists visiting the state has crossed 2 lakhs and 50 Lakhs respectively. Total employment generated in this sector both direct and indirect is about 11 Lakhs and the total revenue generated in the economy due to Tourism is nearly Rs 4000 crores which is 6.29 percent of the G.D.P. With the accelerated investment in Tourism sector, there should be direct employment opportunities for over 10000 persons every year.

3. To promote and market Kerala Tourism products at national and international level thereby making Kerala as a premier global tourism destination.

Promotion and marketing is an important component for development of Tourism. Kerala Tourism will take steps to develop and implement effective market strategies to get better mileage and value for the money expended. This will be based on the market analysis and the consumer preferences.

4. To define and endorse the role of the Government as a catalyst and facilitator for the growth of tourism industry.
Tourism is basically a private sector activity. The state will play the role of catalyst and facilitator. The state will work towards intergovernmental co-ordination, rationalised and mild taxation policies, regulating growth in a sustainable manner and providing safety to tourists. In order to define the role of the Government a Tourism policy will be brought in by the Govt.

5. To rationalise tourism related legislations and policies of the Government so that it is tourism friendly and promotes tourism growth.

As Tourism is multi-sectoral activity and the industry is affected by many other sectors in the economy, the state has to play a lead role in enacting Tourism friendly legislations. The existing legislation like KLU order, Rent Control Act, Labour Act, Building Tax Act, Excise Law etc. will be rationalised in order to facilitate growth of Tourism.

6. To create awareness and tourism consciousness among the people in general and among the taxi drivers, policemen, bus conductors, porters, customs and emigration officers, and others with whom tourists encounter thereby removing prejudices and misconceptions and to make Kerala society a tourism society.

One of the most important component in the development of Tourism is the host population. The host population or the local community which is Tourist friendly will send right message to the Tourist and that leads to a better growth. Government should therefore initiate programs for creating awareness about the Tourism, culture, art and heritage of the state and to inculcate among the host population positive attitude towards tourists.

7. To develop and improve roads, drinking water supply, electricity and power supply, sewage and sanitation systems, signages, transport systems like roads, rail, sea, inland water and air.

An important component for the development of Tourism in any state is the basic infrastructure facilities. The state has to ensure that the basic facilities like motorable roads, clean drinking water, uninterrupted electricity and power supply, proper waste disposal systems, proper transport facilities and signage systems are in proper place. The Government has to have a mechanism for co-ordination with other departments like PWD, Water Authority, Irrigation, Transport, Forest etc. The state will welcome investment in infrastructure sector from NRI's, NRK's and international Funding agencies.

8. To promote sustainable and eco-friendly tourism in the State based on the carrying capacity of the destinations.

The strength of Kerala Tourism is its excellent natural resources in the form of back waters, hill stations and beaches. Having understood the need for looking into the sustainable development of these destinations, Kerala Tourism focuses on the conservation of ecology to reduce the negative impact of tourism on the environment and intend to promote development of tourism based on the carrying capacities of the destination. The development of the tourist destinations will be controlled and regulated based on the guidelines formulated through Area Development Plans to have a planned development.

9. To conserve and preserve the art, culture and heritage of the State.

Kerala is immensely rich in its unique art forms, culture and heritage. The tradition of classical and folk arts in Kerala dates back over a thousand years. Koodiyattom, the oldest art form of Kerala, and the only surviving form of the ancient Sanskrit drama, was recently selected by UNESCO for proclamation as a oral and intangible world heritage. Kathakali, Mohiniyattam, Thullal, Theyyam, Thira etc. are unique. The architectural monuments in the state maintain a uniqueness of character. The state is hastening the process for the preservation and conservation of these heritages.

10. To develop and promote new innovative tourism products, lesser-known destinations, art forms, cuisines, monuments and handicrafts.

Tourism in Kerala is now concentrated in the Southern part of the State. Considering the fragile
nature of the destinations it is necessary to disperse the activities to lesser known destinations to avoid over crowding and exceeding carrying capacities. It is also necessary to promote new products to sustain the positioning. Constant and continuous innovation will be the route to ensure the top slot for Kerala Tourism in the hearts of discerning travellers.

11. To identify, preserve and conserve special tourism zones.

Tourism in Kerala is mainly nature based and unless the developments are controlled/regulated based on special guidelines formulated for the identified special tourism zones, the destination will not sustain for long.

12. To develop and promote KITTS, KIHMS and IHMCT into the institutions par excellence in India and regulate the syllabi and training facilities of other institutions to maintain the quality standards.

Human resources development is an important sector to be developed for effective promotion and development of tourism in the State. In this regard the existing situations like KITTS, KIHMS AND IHMCT into the institutions par excellence. The other institutions offering tourism related courses will be regulated to maintain quality standards.

13. To involve PR.Is and the NGOs in the development of tourism infrastructure and tourism awareness.

Any scheme/project in the field of tourism can only become successful if it is implemented through local participation. The strong Panchayathi Raj Institutions and NGOs in the State can contribute greatly in building up tourism infrastructure and necessary basic amenities. Creation of awareness on the benefits of tourism in terms of economic, physical and social development can successfully be done through the PRIs and NGOs.

SWOT ANALYSIS

Strengths

State is well known for law and order, peace and tranquillity.

As one of the ten Paradises Found by the National Geographic Traveller, Kerala is among the 50 places in the world recommended to be visited in a lifetime. This recognition of the overwhelming greenery and the untainted natural wealth of the State is a reiteration of Kerala’s positioning as God’s Own Country.

Kerala offers a wide variety of tourist attractions and Kerala’s small land area gives it the added advantage of being the best venture for ‘multi destination tourism’. Houseboat holidays in the 900 Kms of tranquil and Ayurvedic rejuvenation packages are two experiences that have no parallel elsewhere. Kerala’s 600 Kms long shoreline has gifted it with some of the most charming beaches in the country such as Kovalam, Varkala, Kappad, Muzhappilangad, Bekal etc.

The Western Ghats regions gilded by scores of mountain streams and waterfalls are the most nature rich parts of Kerala. The high ranges and wooded valleys have some of the finest hill stations in the country and 14 wildlife sanctuaries.

The traditional festivals are colourful social events that reflect the vibrant nature of the land and its people. The boat races in the backwaters are majestic. The traditional art forms in the state are spectacular. Kerala also has a rich and singular cultural heritage.
Above all, Kerala is India’s most advanced society with fully literate people, the world-class care systems, the lowest infant mortality rates, highest life expectancy rates, and an excellent quality of life. The State has a long history of communal harmony and have not experienced any major law and order problems. It is a safe and secure destination.

The State also has a well-knit communication and transportation system. 3 international airports at Thiruvananthapuram, Kochi and Kozhikode the international seaport at Kochi and major railheads ensure easy access to any part of the State.

Long history of communal harmony and friendly population are great strengths of the State.

Weaknesses

Absence of clear and well defined policies
Inadequate infrastructure to match the expectation
Restrictive Airline Policy
Restrictive Coastal Regulation Zone
Lack of quality connectivity
Distance from major markets
Increased neglect of solid and liquid waste management system
Lack of quality shopping and recreation facility
Lack of regulatory mechanism for sustainable development and quality controls
Dearth of funds in implementation of tourism projects
Lack of coordination by various line departments in providing infrastructure
Shortage of entrepreneurial talent in the State
High percentage of low yield foreign tourists
Tourism manned by small and medium operators and investors
Lack of professionalism
Lack of expertise in preparation of tourism plans
Perception as a militant trade union area
High and prohibitive taxation policy

Opportunities

Vast untapped potentials on Heritage tourism, backwater tourism, eco-friendly tourism and health tourism.
Prospective private investors in India and abroad who would be interested in investing in Kerala
Good brand image of the God’s Own Country for targeting high spending high market tourists

“Availability of high quality manpower”
Low credit deposit ratio.

Threats

Unbridled and indiscriminated growth of tourism may lead to problems of pollution, environmental and ecological hazards and cultural degradation.

Over emphasis on tourism may lead to a massive economic recession

VISION TARGETS

1. To increase earnings from tourism at 10% annually
2. To achieve an annual rate of growth of 7% in foreign tourist arrivals and 9% growth in domestic tourists.
3. To create employment opportunities of 10000 every year.
4. To add 200 hotel rooms in star categories every year.
5. To innovate and promote at least one new tourism product/destination every year.
STRATEGY

1. **To elevate tourism as the economic and employment priority of the State by using Tourism as the vehicle of growth for the physical, social and economic development of the State.**

2. **To promote sustainable tourism development with focus on Conservation and Preservation of Heritage.**

3. **To ensure quality services in all sectors of tourism in the form of regulation and monitoring.**

4. **To develop Infrastructure through private sector and Private Public Partnership with Government acting as a facilitator and catalyst.**

5. **To develop and promote tourism products with continuous focus on Backwaters, Ayurveda, performing arts, cuisines and Eco-Tourism.**

6. **To concentrate on development of basic infrastructure by co-ordinating all the line departments.**

7. **To create sufficient quality human resources in the field of tourism within the State.**

8. **To strengthen the institutional mechanism**

9. **To enact proper legislation to sustain the industry and to regulate tourism activities**

10. **To explore and develop new markets for Kerala Tourism products at domestic and international levels.**

11. **To conserve and preserve the great cultural heritage of the State.**

ACTION PLAN

1. **To elevate tourism as the economic and employment priority**

**Long Term**

Department of Tourism will function as the nodal agency in co-ordinating all the activities related to tourism being undertaken by different sectors of economy under different names.

Include tourism in the public education system to induce awareness on benefits in developing tourism.

**Medium Term**

Studies on potential of tourism sector compared to other sectors of economy in the state. Conduct scientific studies on the inter-sectoral issues affecting the development of tourism.

**Short Term**

To have an Apex body with Chief Minister as Chairman, and Ministers and Secretaries of Tourism, Forest, Irrigation, Power, Revenue, Public Works, Local Self Government, Industry, Finance, Culture, Transport, Vice Chairman, Planning Board, Director Tourism, and 2 nominated tourism experts as members to discuss the inter-sectoral issues in development of tourism. Conduct scientific studies on impact of tourism.
On income and employment through Tourism Satellite Accounting. Strengthen the collection of statistics on tourist arrivals, tourist profile, expenditure pattern etc.

Conduct awareness campaign through local bodies, District Tourism Promotion Councils etc.

2. To pursue sustainable tourism development with focus on Conservation and Preservation of Heritage

Long Term

Assess Carrying capacity of all the tourist centres to regulate the developments accordingly.

Medium Terms

Prepare Area development plans for all the tourism destinations and to regulate the developments accordingly. Plans and implementation to be reviewed periodically.

Short Term

Enact Tourism Conservation and Preservation Act to impose planning restrictions.

Identify Special Tourism Zones and enforce the Act to regulate developments and to conserve the heritage.

Encourage Industry Associations to impose regulations on the industry on their own for preventing unethical or illegal activity.

Take up Studies on carrying capacity assessments for all the major destinations.

To involve local people in the planning and implementation stages of all the projects.

To make Environmental impact assessment for all the major projects as a pre-requisite for sanction.

3. To Guarantee quality services in all sectors of tourism.

Long Term

Allow only approved tourism units by Department of Tourism to function in the name of tourism in the State.

Medium Term

Encourage units to upgrade quality. Improve enforcement of exiting legislation for this by various departments.

Short Term

Enforce legislation for the approval of tourism units such as accommodation, restaurant, tour operation, tourist transport operation, ayurveda centres, houseboats, recreation centres, cultural centres, tourism sports, amusements parks, Home Stays, amusement traveller etc. as a symbol of quality.

Ensure only approved units will find place in the publicity material published by Department of Tourism and be eligible for incentives offered by Department of Tourism from time to time.
To create and develop infrastructure through private sector

Long Term

Ensure withdrawal of Government from direct running of all the tourism business activities

Withdraw all financial incentives to private sector investment and encourage the sector to invest in a more openly competitive environment.

Medium Term

Try joint venture with major hotel chains within the country.

Ensure regular meetings of the Apex Body under the chairmanship of Chief Minister to address any issue related to provisions and basic infrastructure facilities to tourism units.

Short term

Introduce Single window systems for clearing tourism projects.
Establish separate cell in financial institutions like KSIDC and KFC for tourism with representatives from Tourism for fast clearance of tourism related projects.
Launch Special campaigns for NRI investments in tourism sector.
Encourage the investors to take up projects to establish connectivity between tourist destinations within the State by air and road.

5. Continue focus on Backwaters, Ayurveda and Eco-Tourism

Long Term

Backwaters
Link the waterways from Kovalam to Kasaragod to enable operation of tourist boats including houseboats.
Develop necessary infrastructure all along the backwater such as boat terminals, jetties, wayside facilities, fuel pumping stations, sewage pumping stations etc.
Interlink all the major nodes along the backwaters with the road networks to enable easy transits.
Initiate measures to enhance the quality of ecology and environment of backwaters.
Establish proper solid and liquid waste disposal system for backwater.

Ayurveda

Allow only approved ayurveda centres by Department of Tourism to function at tourism centres in the name of tourism.
Educate tourists about genuine Ayurveda

Eco-Tourism

Evolve a clear cut strategy to co-ordinate all department and private sector who are having eco-tourism resources and provide synergy for the development of the same.

Market eco-tourism products of Kerala in the international scenario as a distinct product
Prepare proper and monitoring mechanism for eco-tourism products

Medium Term

Backwater
Regulate activities along the entire backwater, canal and lake stretches with respect to setbacks from the water front, design of the buildings, solid waste and sewage disposal etc.
Formulate Backwater Tourism Development Authority with representatives from all stakeholders exclusively to co-ordinate the infrastructural development activities for the sustainable use of the backwaters for tourism purposes.

Stop discharging the sewage directly to the water by any boat used for tourism purpose by enforcing usage of alternative methods.

Ayurveda

Constitute a committee with members from Department of Tourism, Directorate of Indian System of Medicine, and tourism industry to constantly review the implications in using Ayurveda as a tourism product.

Eco-Tourism

Evolve strategies to attract private investment in Thenmala eco-tourism region.

Evolve strategies to empower local people to benefit from the emerging economic opportunities.

Evolve special efforts to tap the eco-tourism potential of the Forest Department, which can ultimately lead to conservation of the resources.

Initiate eco-tourism programme at Pampa and Kochu Pampa.

Develop pilgrim circuit connecting the Ayyappa temples at Kulathupuzha, Aryankavu and Achankovil.

Create eco-tourism centres in backwaters, Waynad and Idukki.

Develop plantation Tourism involving public sectors, Oil Palm India Ltd. and Rehabilitation Plantation Ltd, which falls in the region of Thenmala eco-tourism.

Short Term

Backwater

Construct basic tourism facilities such as boat terminals and waterside facility centres along the houseboat cruise routes from Kollam to Emakulam. Disperse backwater based tourism activities to Malabar Region by developing infrastructure at potential centres such as Chettuva, Kadabandi, Kozhikode, Parassinikkadavu, Neeliswarum, Vallyaparamba etc.

Prepare a master plan for the sustainable use of the backwaters of Kerala for tourism purposes.

Institute special annual award for the most innovative backwater based tourism product.

Encourage quality upgradation of the houseboats through incentives.

Ayurveda

Strengthen the approval system and bring a classification system to grade the ayurveda centres based on the quality of facilities and services.

Eco-Tourism

Formulate specific eco-tourism strategy for Kerala through participatory planning process.

Completion of the ongoing works related to eco-friendly general tourism at Thenmala.

Initiate one-day eco-tourism programme near Kellar Valley Ponmudi

Initiative one-day eco-tourism programme at Palavuli.

Start trekking programme and bird watching trails in Thenmala Eco-tourism Establish the Environment Education centre and Deer Information Centre at Thenmala. Initiate eco-tourism programme at Konni and Achankovil

6. To concentrate on development of basic infrastructure

Long Term

Develop direct air connections from all major tourism markets to all the 3 International airports.

Develop all the major tourism roads on BOT basis.

Ensure adequate water supply, sewage, drainage and solid & liquid waste disposal system in all tourist centres.
Medium Term

Co-ordinate with other States, with Government of India and with international tourism bodies like WTO, WTTC and financial bodies like UNDP, World Bank, ADB etc. for seeking assistance in tourism development.

Short Term

Prepare a project report by identifying all major tour roads and pose it for external financial assistance.
Initiate basic infrastructure projects at the tourist destinations and get it done directly or through line departments giving financial assistance, if needed.

7. To create sufficient quality human resources in the field of tourism within the State

Long Term

Open an Institution of international repute in the State to train quality managerial manpower to manage the tourism industry in the State.
Create the best trained personnel in the tourism industry to cater to the needs both inside and outside the State.

Medium Term

Create a Board to regulate and approve the Institutions conducting tourism related courses

Short Term

Strengthen KITTS to start new courses directly benefiting the tourism industry.
Conduct continuous training programmes to train the various categories of people engaged in the tourism industry such as taxi drivers, cooks, waiters, guides, information offices/assistants, etc.
Encourage starting of new institutions with quality standards in private sector

8. To strengthen the institutional mechanism

Long Term

Professionalise the entire functions of Department of Tourism

Medium Term

Separate the hospitality function from Tourism Department and form a separate Hospitality Department
Strengthen Planning, Marketing and Information wings of Department of Tourism by taking Professionals into.
Stop District Tourism Promotion Councils from direct management of facilities. Identify new role for DTPCs in regulation and quality controls.

Short Term

Enact new role for Department of Tourism to regulate the developments and ensure quality of products and services, marketing and information dissemination.
Professionalise all the areas of tourism
Restructure Kerala Tourism Development Corporation

9. To enact proper legislation to sustain the industry and to regulate tourism activities

Long Term

Enact and enforce legislation for achieving this objective

Medium Term

Revise the Excise law to distinguish between quality hotels providing liquor as a facility (bar attached with hotels) and normal bar where the hotel is attached to a bar to meet the legal reimbursement.

Revise the laws on entertainment tax, luxury tax, sales tax, building tax etc., to incorporate provisions for encouraging investors.

Enact and enforce proper building rules to ensure quality in hotels/resorts etc.

Enact and enforce proper liquid and solid waste management systems for hospitality industry

Short Term

Enact Tourism Conservation and Preservation Act to regulate the developments in the identified tourism zones and ensure quality services in all major sectors of the industry.

10. To explore and develop new markets for Kerala Tourism products at domestic and international markets

Long Term

Focus on domestic tourism and Asia

Acknowledge the emerging economic super power status of China to attract more tourists

Medium Term

Focus on Europe, US, Japan, China and domestic

Make use of better political relation in the South Asian region to attract more regional tourists

Short Term

Focus on Europe, US, Japan, Gulf domestic

Continue and strengthen marketing in the high yielding markets mentioned above

11. To Conserve and Preserve the cultural heritage of the State

Long Term

Create a partnership with industry to educate the public about the need to conserve and preserve the heritage and implement on action plan.

Medium Term

Work with INTACH, Art and Heritage Commission and Cultural institutions to synergise tourism and culture. Ensure culture is not degraded by commercialisation.

Short Term

Introduce legislation through appropriate departments to conserve and preserve cultural and heritage
ANNEXURE

Annexure I
Tourism is a major phenomenon of the modern society with significant socio-economic consequences. According to the World Travel and Tourism Council (WTTC), Tourism is the world’s most rapidly growing industry and by the year 2005, the contribution of tourism to the world economy would be more than doubled from the base level of 1994. India’s total earnings from the tourism sector in 1999 were $2.92 billion which accounts for a mere 0.64% of the global market. The total tourist arrivals at 2.49 million accounted for a mere 0.37% of the global tourist arrivals. The travel and tourism challenge is to enhance the contribution to employment for 5.6% at present to 8.2% worldwide. With impetus to tourism it is possible to generate 44 million jobs in India as against 18 million at present. In Kerala, tourism has emerged as one of the few economic alternatives to develop the state economy. It has been recognized as an important sector for the development on account of its potential for generating income and employment. Tourism is likely to be the engine of growth giving a big push to Kerala’s economy in the coming years.

Tourism in Kerala has recorded remarkable growth in the last few years. The number of foreign tourists and domestic tourists visiting the state has crossed 2 lakhs and 50 lakhs respectively. The percentage share of Kerala in foreign tourists arrival is more than 8% in the country.

The direct revenue generated in the economy due to Tourism is assessed as about 2000 crores during last year which comes to about 3% of GDP of the state. Considering the multiplier effect of 2.07, the direct+indirect revenue generated comes to 6.29% of the GDP.

The direct employment as estimated by ‘Tata Consultancy Services’ in tourism sector in the state comes to about 1.50 lakhs. Including the multiplier effect of 4.62 the direct and indirect employment in tourism in Kerala is estimated as 7.0 lakhs.

The total investment in tourism in the state for the last five years is estimated in the order of Rs. 1000 crores.

ANNEXURE

Agencies involved in tourism development

Following are the major agencies involved in the development of tourism in the state.

Department of Tourism:
Department of Tourism: is mainly having a coordinating role and is acting as a facilitator between various agencies involved in the development of tourism in the state. It coordinates the activities in planning, publicity and promotion, infrastructure development, destination development, Human Resources Development, investment promotion and enacting legislative measures. Department of Tourism is also directly involved in infrastructure and destination development in less developed areas to attract others to invest in these areas.

Kerala Tourism Development Corporation (KTDC):
Kerala Tourism Development Corporation is actively participating in building up basic infrastructure needed for the development of tourism in state. They operate star hotels, budget hotels, motel-Arama’s, Yatri Niwas, restaurants and beer parlours, central reservation systems and conduct conducted tours. Developing Mascot hotel into a five star deluxe hotel, construction of four star hotel at Munnar, construction of heritage resort at Kumarakom, developing Bolghatty Palace as heritage hotel etc. are some of the projects undertaken by KTDC at present.

Tourist Resorts (Kerala) Ltd. (TRKL): Tourist Resorts (Kerala) Ltd. is formed as a subsidiary company
of KTDC and is engaged in implementing the projects such as investment in joint venture companies, land bank projects etc. Department had already established tie-ups with Taj Group of Hotels at many destinations through TRKL and has also a similar collaboration with Oberoi Group.

Bekal Resort Development Corporation: Bekal Resorts Development Corporation is formed to develop Bekal as a planned tourist destination of international standard. Above 100 acres of land has been acquired by the corporation by now. Private sector is being invited for dispensing six sites for construction of resorts.

The District Tourism Promotion Councils: District Tourism Promotion Council with District Collector as Chairman and selected people representatives and officials as members coordinate the development of the less known tourist centres within the district. This has led to enhanced focus on tourism in the districts.

Thenmala Eco-Tourism Society: Thenmala has been developed as a unique eco-tourism destination through a society registered under the Kerala Societies Registration Act with members from Department of Tourism, Department of Power, Department of Forest and Department of Irrigation as the area of operation comes under the jurisdiction of various departments.

Kerala Institute of Travel and Tourism Studies (KITTS) and Kerala Institute of Hospitality Management Studies (KIHM): These institutes are playing a pioneering role in providing necessary manpower training in the field of tourism.

Critical Role of Private Sector: The private sector investment is the backbone of Kerala's tourism industry. Major international and national hotel chains like Taj, Oberoi, Le Meridian, Best Western, Golden Tulip, Casino, Mahindra Resorts, etc. have already established hotels and resorts in the state.

The private sector in Kerala has also been able to spread tourism to hitherto virgin areas in the state like Marari, Vythiri, Kalpetta, Mananthavady, Poovar etc. The boutique hotels and resorts of Kerala have also established Kerala as a destination for upscale tourists. By preserving and showcasing the unique natural and cultural attractions of Kerala the tourism trade has also contributed to the sustainability of the destination. Non resident Keralites have also identified tourism as a high growth sector area for investment.

The tour operators have also played a key role in the development of tourism to Kerala by developing unique and innovative tour options. Most of the leading tour operators in India like Thomas cook, SITA, TCI, UVI etc. feature Kerala prominently in their national and international holiday brochures with popular itineraries to Kerala. A number of home-bred Tour Operators like Kerala Travels, Great India Tour Company, Pioneer Travels etc with exhaustive knowledge of the state have also established themselves as niche players in Kerala's tourism industry.

A joint Task Force focusing on Private -Public partnership has been constituted with major actors of the industry as members to act as advisors in the tourism development activities.

Annexure

Destination development- perspectives and prospects

Development of Veli as an international tourist centre

Action is being taken to develop Veli Tourist Village as an international tourist centre through private participation. 14 acres of land has been acquired for developing an amusement park, oceanarium and dolphinarium of international standard through private participation. 11 acres of land will be acquired during next financial year.
Thenmala as an international eco-tourism destination

A society have been constituted to develop Thenmala as an international eco-tourism destination. Master plan have been prepared and started implementing with the co-ordination of Forest, Irrigation and Power departments. Part of the project have already been commissioned.

Development of Kannur as a major tourist destination in Malabar.
Integrated tourism development of Kannur has been taken up during the last few years. Muzhappilangad and Payyambalam beaches have been developed to attract international tourists to these tourist destinations. Development of Dharmadam Island, Thalassery Fort, Kannur Fort etc has been initiated under this project.

Face lifting of Kovalam Beach

The facilities at Kovalam have been upgraded to improve the image of the beachresort. Development of roads and pathways, lighting, augmentation of water supply scheme, construction of tourist information centre with modern facilities etc have been undertaken by the department. Beach cleaning and lifeguard services are regularly offered. Action is on for the development of a sewage disposal system to fulfil the long-standing demand.

Development of Varkala Beach

Developmental activities such as construction of pathways, lighting etc, have been taken up at Varkala to make the Varkala cliff, beach and surroundings acceptable to international tourists.

Integrated Development of Fort Kochi

Department is taking action on developing Fort Kochi as an international heritage centre. The projects worth of Rs. 6.00 crores are being implemented here.

Rope way at Malampuzha

A Rope way at Malamphuzha was set up to attract tourists. It was the first project in Kerala, which was commissioned on a Build, operate and Manage (BOM) basis.

Development of Ponmudi as a major hill station

Accommodation facilities have been improved at Ponmudi. Tourist information centre, children's park etc have been developed. Construction of a tourist complex, with luxurious accommodation facilities has been initiated with central assistance.

Development of Vagamon as an international hill resort

Government have already transferred 751 hect. of land from Kerala Livestock Development Board to Tourism Department to develop Vagamon as an international hill resort. Master plan for the development of this centre is being prepared.

ANNEXURE

Infrastructure Development

Department of Tourism has given stress in developing tourism infrastructure and basic amenities needed for the development of tourism in the state. Following are the major infrastructure projects undertaken during the last few years.

'World Class road and backwater signages'
Department of Tourism has completed the work of installation of international road and backwater signages after detailed studies conducted through NATPAC

'Intensive backwater development'

Department of Tourism has been giving thrust for the development of basic infrastructure along the backwaters of the state for tourism promotion. The projects under implementation are:

- World class Houseboat terminals at major backwater nodes: Construction of house boat terminals have been initiated at major backwater nodes such as Alappuzha, Kunnarokkom and Thanneemukkom.

- Integrated development of Pamba-Kuttanad backwater region: Tourism infrastructure and basic amenities are being developed along the Pamba-Kuttanad backwater cruise routes after detailed studies through NATPAC. Tourist resorts at Pallathuruthy, Nedumudi, Kotharathode and Vattakkayal are being developed.

- Integrated development of Ashtamudi backwaters:

Construction of Gateway centre Kollam, water sports activities etc., are being taken up as part of integrated development of Ashtamudi backwaters.

Dispersal of backwater based tourism activities to Malabar area: Houseboats have been sanctioned to Neeleswaram, Parassinikkadavu, Kozhikode and Chettuva as a part of dispersing the backwater based activities to Malabar area. Vayalaparamba is being developed as a major backwater centre. Studies are being undertaken by NATPAC on the development of basic infrastructure along the potential cruise routes in Malabar.

- Development of Kovalam-Kollam waterway for houseboat operation: Detailed study has been carried out through NATPAC for the development of Kovalam-Kollam waterway for houseboat operation. The first phase of the project from Kovalam to Akkulam is being taken up with Irrigation department.

- Development of transit points along the cruise routes:

Construction of waterside amenities at Kayamkulam and Alumkadavu have been completed.

Development of budget accommodation facilities at tourist/Pilgrim centres
Department has constructed budget accommodation opportunities like beach resorts in emerging destinations like Varkala, Kappad etc. The construction of tourist resorts at Paravoor, and Athirappally also has been completed. Department have completed the construction of Yatri Niwasas at Alappuzha, Kochi, Malayattor, Peerumedu and Changanassery during the period. The construction of Yatri Niwasas at Kalady, Kozhikode, Guruvayoor, Nelliyampathy, Thirunelley, Kondoity, Munnar and Mannarikkad are being taken up. Construction of pilgrim amenity centre at Erumeli and Kulanada are also being taken up.

Development of Wayside facilities: Construction of Wayside amenities at Kuttippuram and Aranmula has been completed.

Tourist reception centres at major tourist centres: Construction of tourist reception centre at Kovalam, Varkala Railway Station and international airport Nedumbassery has been completed. Tourist reception centres at Munnar, Vythiri, Thekkady and Varkala are being taken up.

Thrust on development of tourism roads: Department of tourism is giving thrust on the development of tourism roads. The following road developments have been initiated. Development of Thekkady-Munnar road, Thekkady-Kumily road, tourism roads in Wayanad districts, tourism roads in Kollam district etc are being taken up.

Integrated development of Museums: Department have initiated the development of major museums in the state namely Napier Museum at Thiruvananthapuram and Hill Palace at Thripunithura. The works at Hill Palace museum is in good progress and the 1st phase has been completed.
Illumination of historical buildings: Department of Tourism have undertaken the illumination of Vadakkunnatha Temple Thrissur and Secretariat building Thiruvananthapuram. Government have also sanctioned the project for Light and Sound show at Kanakakkunnu palace.

Sooryakanthi Exhibition ground at Kanakakkunnu: As a major step in improving the facilities in Thiruvananthapuram, Department of Tourism has taken up the construction of Sooryakanthi exhibition ground at Kanakakkunnu Palace premises with an idea of converting Kanakakkunnu Palace as a world class landscaped garden. The Nishagandhi Auditorium in the Kanakakkunnu Palace premises is the venue of the Nishagandhi Dance Festival which has become a major event in the national cultural calendar as is a major attraction for the foreign tourists interested in India’s cultural heritage.

Landscaping at Kanakakkunnu Palace premises:

Kanakakkunnu Palace premises is being converted into a world class landscaped garden

Beautification of Munnar: Works have already been sanctioned to beautify Munnar town through Public Works Department.

Development of Kumarakom: Department have sanctioned many schemes for the development of Kumarakom through Kumarakom Panchayat.