CHAPTER -3

3.1 TOURISM DEVELOPMENT IN GUJARAT

3.1.1 INTRODUCTION

International tourism has been described by Louis Turner as “the most promising complex and under-utilized industry impinging on the Third world”\(^1\). The statement penned some 60 years ago is still true for India in general and Gujarat in particular. Tourism as we understand today has started in India in a small way in the early 1950’s\(^2\). In Gujarat, the modern concept of tourism – planning, marketing and management was adopted by the State Government in 1973. It was for the first time a separate Tourism Department was established to identify and help promote the tourist destinations of the State. In 1978 “Tourism Corporation of Gujarat Limited” (TCGL) was formed and the corporation was entrusted with the task of undertaking and developing tourism related activities in the State\(^3\).

As mentioned earlier, Gujarat was formed on May 1, 1960 as a result of the Bombay Reorganization Act 1960. Over the period of 52 odd years, Gujarat has witnessed quantum jump in industry, agricultural and in service sectors. Tourism though comes under Industrial Sector, is one area where there is considerable scope for improvement. It seems, till recent times, that tourism sector has not received the amount of required level of attention of the State Government or the agencies like “Department of Tourism” and “Tourism Corporation of Gujarat Ltd.”. For an institution or for that matter even for a Nation/States, collection of correct information or data bank is an important aspect in its development process. Without correct information, future development planning for the Nation/States or the concern sectors will not be possible. Even at this juncture, while the study is in progress, the availability of statistical data regarding different aspects related to tourism in the State are either not available or if at all available, they are in a most inadequate form. It was only from 2002 –03 i.e., beginning of Tenth Five Year Plan that to some extent proper

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\(^1\)Pushpinder S. Gill (Ed.) (2010); Tourism Economic and Social Development; Anmol Publications Pvt. Ltd., New Delhi
\(^2\)Government of India; Second Five Year Plan Document, 1956-61
\(^3\)Dalal Mott MacDonald (2003); 20 Years Perspective Plan for the Development of Sustainable Tourism in Gujarat
data regarding tourism were collected and published by TCGL (Tourism Corporation of Gujarat Limited) and Government of Gujarat. Surprisingly, important year-wise data regarding State tourism receipts, employment and income generated are not yet published by TCGL or Government of Gujarat. With these shortcomings, the present study used TCGL/Government of Gujarat’s published data of 2002–03 and onward for the major part of the study and used 1997–98 onward data wherever available.

3.1.2 CONTRIBUTION OF TOURISM TO STATE GDP

Gujarat, as a tourist destination, has enormous potential, which has not been properly tapped yet. In a study published by Confederation of Indian Industry (CII), it has estimated the contribution of Tourism to the State GDP (Gross Domestic Product) from 2002 to 2011 and forecasted for the period 2012 to 2022. From the Table 3.1 it could be seen that tourism’s contribution to State GDP was only 2.53 percent in 2002 which increased to 3.76 percent by 2011. Thus, the contribution of tourism sector to the State GDP indicates that tourism in Gujarat is still in infant stage. Again, from the table one could see that, as per the forecast made by Confederation of Indian Industry (CII), the contribution will be 4.02 percent in 2012 which will increase to 5.06 percent in 2015, 8.16 percent in 2020 and by 2022 the contribution will be little more than 10 percent.

In respect of employment, the CII study indicated that in the year 2003 about 6.5 to 7 lakh persons (estimated) are employed directly in tourism sector in the State. Tourism has a multiplying effect in the State economy. The multiplier effect of tourism in Gujarat, as per CII study, is around 2.5 units.

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4Confederation of Indian Industry (CII), July 2003: Tourism in Gujarat-The Way Ahead
Table 3.1
Contribution of Tourism to State GDP (Gujarat)

<table>
<thead>
<tr>
<th>Year</th>
<th>State GDP (Rs. in Crores)</th>
<th>Tourism Contribution to State GDP (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002</td>
<td>77000</td>
<td>2.53</td>
</tr>
<tr>
<td>2003</td>
<td>78540</td>
<td>2.59</td>
</tr>
<tr>
<td>2004</td>
<td>80111</td>
<td>2.67</td>
</tr>
<tr>
<td>2005</td>
<td>81713</td>
<td>2.76</td>
</tr>
<tr>
<td>2006</td>
<td>83347</td>
<td>2.88</td>
</tr>
<tr>
<td>2007</td>
<td>85014</td>
<td>3.00</td>
</tr>
<tr>
<td>2008</td>
<td>86715</td>
<td>3.15</td>
</tr>
<tr>
<td>2009</td>
<td>88449</td>
<td>3.33</td>
</tr>
<tr>
<td>2010</td>
<td>90218</td>
<td>3.53</td>
</tr>
<tr>
<td>2011</td>
<td>92022</td>
<td>3.76</td>
</tr>
<tr>
<td>2012*</td>
<td>93863</td>
<td>4.02</td>
</tr>
<tr>
<td>2013*</td>
<td>95740</td>
<td>4.32</td>
</tr>
<tr>
<td>2014*</td>
<td>97655</td>
<td>4.67</td>
</tr>
<tr>
<td>2015*</td>
<td>99608</td>
<td>5.06</td>
</tr>
<tr>
<td>2016*</td>
<td>101600</td>
<td>5.52</td>
</tr>
<tr>
<td>2017*</td>
<td>103632</td>
<td>6.04</td>
</tr>
<tr>
<td>2018*</td>
<td>105704</td>
<td>6.65</td>
</tr>
<tr>
<td>2019*</td>
<td>107819</td>
<td>7.35</td>
</tr>
<tr>
<td>2020*</td>
<td>109975</td>
<td>8.16</td>
</tr>
<tr>
<td>2021*</td>
<td>112174</td>
<td>9.09</td>
</tr>
<tr>
<td>2022*</td>
<td>114418</td>
<td>10.18</td>
</tr>
</tbody>
</table>

Note: * Projections

Source: (i) Confederation of Indian Industry (CII), July 2003: Tourism in Gujarat-The Way Ahead
(ii) Dalai Mott MacDonald (2003); 20 Years Perspective Plan for the Development of Sustainable Tourism in Gujarat
## Table 3.2

State Government Outlays for Tourism (Gujarat)

<table>
<thead>
<tr>
<th>Year</th>
<th>State Budget (Rs. in Crores)</th>
<th>Outlay Tourism (Rs. In Crores)</th>
<th>% of State Budget</th>
<th>% Change over Previous year’s Outlay</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997-98</td>
<td>5,400</td>
<td>3.50</td>
<td>0.06</td>
<td>-</td>
</tr>
<tr>
<td>1998-99</td>
<td>6,500</td>
<td>13.00</td>
<td>0.20</td>
<td>271.43</td>
</tr>
<tr>
<td>1999-2000</td>
<td>7,600</td>
<td>24.50</td>
<td>0.32</td>
<td>88.46</td>
</tr>
<tr>
<td>2000-2001</td>
<td>7,200</td>
<td>26.00</td>
<td>0.36</td>
<td>6.12</td>
</tr>
<tr>
<td>2001-02</td>
<td>7,600</td>
<td>12.00</td>
<td>0.16</td>
<td>(-) 53.85</td>
</tr>
<tr>
<td>2002-03</td>
<td>7,600</td>
<td>12.14</td>
<td>0.16</td>
<td>1.67</td>
</tr>
<tr>
<td>2003-04</td>
<td>7,860</td>
<td>12.14</td>
<td>0.15</td>
<td>0</td>
</tr>
<tr>
<td>2004-05</td>
<td>8,610</td>
<td>10.68</td>
<td>0.12</td>
<td>(-) 12.03</td>
</tr>
<tr>
<td>2005-06</td>
<td>11,000</td>
<td>35.00</td>
<td>0.32</td>
<td>227.72</td>
</tr>
<tr>
<td>2006-07</td>
<td>12,503</td>
<td>100.00</td>
<td>0.80</td>
<td>185.71</td>
</tr>
<tr>
<td>2007-08</td>
<td>16,000</td>
<td>100.00</td>
<td>0.63</td>
<td>0</td>
</tr>
<tr>
<td>2008-09</td>
<td>21,000</td>
<td>100.00</td>
<td>0.48</td>
<td>0</td>
</tr>
<tr>
<td>2009-10</td>
<td>23,500</td>
<td>164.83</td>
<td>0.70</td>
<td>64.83</td>
</tr>
<tr>
<td>2010-11</td>
<td>30,000</td>
<td>183.00</td>
<td>0.61</td>
<td>11.02</td>
</tr>
<tr>
<td>2011-12</td>
<td>38,000</td>
<td>200.00</td>
<td>0.53</td>
<td>9.29</td>
</tr>
</tbody>
</table>


Table 3.2 provides year wise information on outlay on tourism for the years 1997 – 98 to 2011 – 12. The table indicates that in the year 1997 – 98 out of Rs. 5400 Crores of the total State budget, only Rs. 3.50 Crores had been allotted for tourism, i.e., 0.06...
percent of the total State budget allotment. It is surprising that till 2011 – 12, the budget allotment for tourism was less than 1 percent of State budget outlay. From the Table, it seems that in 2006-07 the State government realized that Tourism can be an important revenue earning unit and thus Rs. 100 Crores had been allotted to tourism sector whereas it was just Rs. 35 Crores for the previous year. However, the outlay remained constant, i.e., Rs. 100 Crores for the next two years (2007-08 and 2008-09).

In percentage share terms, in 2006-07 it was 0.80 percent, which declined to 0.63 percent in 2007-08 and further declined to 0.48 percent in 2008-09. The periods 2009-2012 saw an increase in outlays and gradually reached Rs. 200 Crores in 2011-12. But, if percentage changes over previous years are taken into account then the picture is a little different. Though the actual amount increased from Rs. 164.83 Crores in 2009-10 to Rs. 183 Crores in 2010-11 and Rs. 200 Crores in 2011-12, the percentage share has actually declined during the last three years period. Thus, it is not surprising why contribution to Tourism to State GDP hovered between 2 percent and 4 percent only, for the periods 2002 to 2012 (Table: 3.1). If forecast done by “CII” is to be believed, then by 2022 the contribution to Tourism to State’s GDP will be somewhere around 10 percent which still falls short of State’s Tourism potential.

3.2 TOURIST INFLOW TO THE STATE

Table 3.3 shows that in the year 1997 – 98 the total influx of tourist in the State was 74.29 lakhs which increased to 223.64 lakhs by 2011 – 12. The Compound Annual Growth Rate (CAGR) comes to 13.75 percent. In Table 3.3, an attempt is made to categorize the tourists into four broad heads viz., (i) Within Gujarat, (ii) Other Indian States, (iii) NRI, and (iv) Foreigners.

The Table clearly shows that from 1997 – 98 to 2001 – 02, tourism department collected data on tourist origin only under the heads Domestic tourism and Foreigners which includes NRI tourists also. It was only from 2002 – 03 that proper data were collected under the above mentioned four heads. Thus, for all practical purpose it will be proper to attempt an in-depth study of the tourist origin in the State from 2002 – 03 to 2011 – 12 with some passing remarks for the period, 1997 – 98 to 2001 – 02.

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5 Table 3.1
### Table 3.3
Tourist Arrivals by Origin (Gujarat)

<table>
<thead>
<tr>
<th>Years</th>
<th>Within Gujarat Nos</th>
<th>%</th>
<th>Other Indian States Nos</th>
<th>%</th>
<th>Total Domestic Nos</th>
<th>%</th>
<th>Non-Resident Indian (NRI) Nos</th>
<th>%</th>
<th>Foreigners Nos</th>
<th>%</th>
<th>Total Foreign Tourists (NRI + Foreigners) Nos</th>
<th>%</th>
<th>Total Tourist Flow/Arrivals</th>
<th>%</th>
<th>Annual Growth %</th>
</tr>
</thead>
<tbody>
<tr>
<td>1997-98</td>
<td>NA</td>
<td></td>
<td>NA</td>
<td></td>
<td>73.98</td>
<td>99.58</td>
<td>NA</td>
<td></td>
<td>NA</td>
<td></td>
<td>0.31</td>
<td>0.42</td>
<td>74.29</td>
<td>100</td>
<td>(-) 15.16</td>
</tr>
<tr>
<td>1998-99</td>
<td>NA</td>
<td></td>
<td>NA</td>
<td></td>
<td>62.83</td>
<td>99.68</td>
<td>NA</td>
<td></td>
<td>NA</td>
<td></td>
<td>0.20</td>
<td>0.32</td>
<td>63.03</td>
<td>100</td>
<td>(-) 22.02</td>
</tr>
<tr>
<td>1999-2000</td>
<td>NA</td>
<td></td>
<td>NA</td>
<td></td>
<td>115.33</td>
<td>99.52</td>
<td>NA</td>
<td></td>
<td>NA</td>
<td></td>
<td>0.56</td>
<td>0.48</td>
<td>115.89</td>
<td>100</td>
<td>83.86</td>
</tr>
<tr>
<td>2000-2001</td>
<td>NA</td>
<td></td>
<td>NA</td>
<td></td>
<td>114.08</td>
<td>99.68</td>
<td>NA</td>
<td></td>
<td>NA</td>
<td></td>
<td>0.37</td>
<td>0.32</td>
<td>114.45</td>
<td>100</td>
<td>(-) 30.92</td>
</tr>
<tr>
<td>2001-02</td>
<td>88.86</td>
<td>99.57</td>
<td>NA</td>
<td></td>
<td>0.38</td>
<td>0.43</td>
<td>89.24</td>
<td>100</td>
<td>(-) 22.02</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2002-03</td>
<td>46.27</td>
<td>75.06</td>
<td>14.73</td>
<td>23.89</td>
<td>61.00</td>
<td>98.95</td>
<td>0.28</td>
<td>0.45</td>
<td>0.37</td>
<td>0.60</td>
<td>0.65</td>
<td>1.05</td>
<td>61.65</td>
<td>100</td>
<td>(-) 30.92</td>
</tr>
<tr>
<td>2003-04</td>
<td>59.52</td>
<td>74.58</td>
<td>19.64</td>
<td>24.61</td>
<td>79.16</td>
<td>99.19</td>
<td>0.34</td>
<td>0.42</td>
<td>0.31</td>
<td>0.39</td>
<td>0.65</td>
<td>0.81</td>
<td>79.81</td>
<td>100</td>
<td>29.46</td>
</tr>
<tr>
<td>2004-05</td>
<td>58.76</td>
<td>77.19</td>
<td>16.76</td>
<td>22.02</td>
<td>75.52</td>
<td>99.21</td>
<td>0.38</td>
<td>0.50</td>
<td>0.22</td>
<td>0.29</td>
<td>0.60</td>
<td>0.79</td>
<td>76.12</td>
<td>100</td>
<td>(-) 4.62</td>
</tr>
<tr>
<td>2005-06</td>
<td>82.50</td>
<td>77.07</td>
<td>22.79</td>
<td>21.30</td>
<td>105.29</td>
<td>98.37</td>
<td>0.98</td>
<td>0.92</td>
<td>0.76</td>
<td>0.71</td>
<td>1.74</td>
<td>1.63</td>
<td>107.03</td>
<td>100</td>
<td>40.61</td>
</tr>
<tr>
<td>2006-07</td>
<td>95.96</td>
<td>77.75</td>
<td>25.40</td>
<td>20.57</td>
<td>121.36</td>
<td>98.32</td>
<td>1.10</td>
<td>0.89</td>
<td>0.97</td>
<td>0.79</td>
<td>2.07</td>
<td>1.68</td>
<td>123.43</td>
<td>100</td>
<td>15.32</td>
</tr>
<tr>
<td>2007-08</td>
<td>111.28</td>
<td>78.79</td>
<td>27.66</td>
<td>19.59</td>
<td>138.94</td>
<td>98.38</td>
<td>1.24</td>
<td>0.88</td>
<td>1.05</td>
<td>0.74</td>
<td>2.29</td>
<td>1.62</td>
<td>141.23</td>
<td>100</td>
<td>14.42</td>
</tr>
<tr>
<td>2008-09</td>
<td>122.85</td>
<td>77.72</td>
<td>32.27</td>
<td>20.42</td>
<td>155.12</td>
<td>98.14</td>
<td>1.81</td>
<td>1.14</td>
<td>1.14</td>
<td>0.72</td>
<td>2.95</td>
<td>1.86</td>
<td>158.07</td>
<td>100</td>
<td>11.93</td>
</tr>
<tr>
<td>2009-10</td>
<td>130.77</td>
<td>76.88</td>
<td>36.24</td>
<td>21.30</td>
<td>167.01</td>
<td>98.18</td>
<td>2.03</td>
<td>1.19</td>
<td>1.07</td>
<td>0.63</td>
<td>3.10</td>
<td>1.82</td>
<td>170.11</td>
<td>100</td>
<td>7.61</td>
</tr>
<tr>
<td>2010-11</td>
<td>150.62</td>
<td>76.03</td>
<td>43.55</td>
<td>21.98</td>
<td>194.17</td>
<td>98.01</td>
<td>2.57</td>
<td>1.29</td>
<td>1.39</td>
<td>0.70</td>
<td>3.95</td>
<td>1.99</td>
<td>198.12</td>
<td>100</td>
<td>16.47</td>
</tr>
<tr>
<td>2011-12</td>
<td>171.76</td>
<td>76.80</td>
<td>47.28</td>
<td>21.14</td>
<td>219.04</td>
<td>97.94</td>
<td>2.85</td>
<td>1.28</td>
<td>1.75</td>
<td>0.78</td>
<td>4.60</td>
<td>2.06</td>
<td>223.64</td>
<td>100</td>
<td>12.88</td>
</tr>
<tr>
<td>CAGR 2002-03 to 2011-12</td>
<td>14.02</td>
<td>12.37</td>
<td>13.64</td>
<td>26.12</td>
<td>16.81</td>
<td>21.61</td>
<td>13.75</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:**
(i) Figures in the individual columns may not exactly add up to total due to rounding off.
(ii) CAGR: Compound Annual Growth Rate; NA: Data Not Available

**Source:** GITCO; TFIS Annual Report, 2011-12
The Table 3.3 indicate that during the period 2002 – 03, out of 61.65 lakh tourists, 46.27 lakhs (75.06 percent) tourists were from “Within Gujarat”, 14.73 lakhs or 23.89 percent were tourist coming from “Other Indian States” and just 0.65 lakhs, a little more than 1 percent of the total tourist in-flow of the State were either Foreigners or NRIs. However, by 2011 – 12, i.e. a decade later, the tourist origin from “Within Gujarat” increased to 171.76 lakhs or in terms of Compound Annual Growth Rate (CAGR), it comes to 14.02 percent. In percentage terms, the share of “Within Gujarat” tourist out of total tourist flow in the State for the year 2011 – 12 was about 77 percent.

In the case of tourist flow from “Other Indian States”, in 2002 – 03 it was 14.73 lakhs or nearly 24 percent of the total tourist influx of the year. By 2011 – 12, the tourist flow increased to 47.28 lakhs or 21 percent of total tourist flow of the State. In terms of Compound Annual Growth Rate (CAGR) for the year 2002 – 03 to 2011 – 12, comes to 12.37 percent. As NRI’s and Foreigners are both tourist coming from outside India, it will not be wrong to combine them as NRI/Foreigners. From Table it can be seen that mere 1.1 percent tourists belong to NRI/Foreigners category in 1997 – 98 which increased to 2 percent by 2011 – 12. As for the Compound Annual Growth Rate (CAGR), it comes to 21.61 percent. In fact over the period 2002 – 03 to 2011 – 12, the bulk of the tourists in the State consist of “Within the State” tourists. The percentage share of “Within State” tourists fluctuated between 75 percent and 79 percent within the period 2002 – 03 to 2011 – 12, the highest being in the year 2007 – 08 (79 percent). In the case of Foreigner/NRI tourists flow it was just 0.65 lakhs or a little more than 1 percent of the total tourist flow of the State during 2002 – 03. By 2011 – 12, the flow increased to 4.60 lakhs. In terms of percentage share it was little more than 2 percent of total tourist flow in the State. In short, from 2002 – 03 to 2011 – 12 i.e., in ten years’ time, Foreigner/NRI tourist flow increased by about 4 lakhs and the share increased by about 1 percent.

If “NRI” and “Foreigners” are separately studied, then Table 3.3 clearly shows that the flow of “NRI” tourists were 0.28 lakhs in 2002-03 which increased to 2.85 lakhs by 2011-12, i.e. an increase of 2.57 lakhs in ten years’ time. The CAGR comes to 26.12 percent. While, the “Foreigners” flow was 0.37 lakhs in 2002-03 which
increased to 1.75 lakhs by 2011-12, i.e., an increase by 1.38 lakhs. The CAGR in this case comes out to be 16.81 percent. In short, foreign tourists visiting Gujarat over the periods consist mostly of “NRIs”. This reflects the State’s inability to attract “Foreigners” as per its potential.

From Table 3.3 we can see that the annual growth during 1997 – 98 to 2011 – 12 did not follow any consistent pattern especially in pre 2005 – 06 periods. While 1998 – 99, 2000 – 01, 2001 – 02, 2002-03 and 2004-05 had shown negative growth, whereas there were positive growth in the years 1999 – 2000 and 2003 – 04. Since 2005 – 06 there has been a positive growth all along. Though the annual growth rate was positive from 2005-06 to 2009-10, it showed a declining trend. However there was an increase during 2010-11 and but it fell again to 12.88 percent during 2011-12 from 16.47 percent in 2010-11. Given the vastly enhanced base, it is difficult to achieve double digit annual growth and contemplating this, the annual growth of 12.88 percent is quite impressive. The CAGR for 2002 – 03 to 2011 – 12 is 13.75.

At this stage it will not be out of place if an attempt is made to see the comparative position regarding the flow of Foreigner/NRI tourist, visiting India and how many of them visit Gujarat during their visit to India.

Table 3.4 shows total flow of foreign (Foreigner/NRI) tourists in India and also in Gujarat during the years 2003 to 2012. The Table also shows what percentage of foreign tourists visit Gujarat vis-à-vis India. The Table gives quite a grim picture. Only 7 percent of the total foreign tourists visiting India visited Gujarat in 2011 which increased to around 8 percent in 2012. This indicates that Government of Gujarat in general and TCGL in particular will have to put much more effort so as to attract foreign tourists to Gujarat. In one of its study, “Tourism in Gujarat – The Way Ahead”, Confederation of Indian Industry (CII) comes out with the following statement6, “In spite of the major attractions that Gujarat can boast of components for sustainable tourism development needs to be identified for transforming Gujarat as a major tourist destination. The relative inability of Gujarat State to harness and develop its full tourist potential and attract tourists is attributable to a combination of factors like lack of effective policies, inadequate tourist infrastructure, ineffective marketing and lack of decent facilities for tourists... Tourism in Gujarat till date has

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6 Confederation of Indian Industry (CII), July 2003: Tourism in Gujarat-The Way Ahead
Table 3.4
Foreign Tourist Arrivals (Gujarat)

<table>
<thead>
<tr>
<th>Year</th>
<th>India</th>
<th>Gujarat</th>
<th>Gujarat as % of India</th>
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<td>2012</td>
<td>65.80</td>
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</table>

Source: (1) Government of India, Department of Tourism, New Delhi; Indian Tourism Statistics at a Glance, 2013
(2) GITCO; TFIS Annual Report, 2011-12

lacked focus in making the sector a revenue-earning sector as it is in states like Kerala, Rajasthan, Himachal Pradesh and to a certain extent Madhya Pradesh. It has even not been able to anchor in its biggest strength of religious tourism properly. At the end one could say that the origin of tourists visiting Gujarat mainly comprises of “Within the State” tourists followed by tourists from “Other Indian States”. Tourists from outside the country i.e., Foreigner/NRI visiting Gujarat comprises of only 2 percent of the total tourists arrivals to the State of Gujarat (Table 3.3).
The CII's above mention study came out with an interesting finding. The study says, that “Non-Resident Gujaratis of almost 2 million comprises an important tourist segment with about 30 percent of those visiting Gujarat every year. They do have a keen interest in local destinations but prefer other states for pleasure trips. This market is yet untapped”. In other words, Tourism Department has to do much spade work so as to make Gujarat as a foreign tourists a must visit place.

3.2.1 PURPOSE OF TOURIST VISITING THE STATE

In Table 3.5, an attempt is made to observe tourist's purpose of visiting Gujarat and their proportion in total. In order to narrate the matter, visiting purpose has been categorized into four broad heads viz., Business, Leisure, Religion and Others. It is clear from the Table 3.5 that majority of tourist visits are for Business purpose. In percentage terms, the share of tourist flow for Business purpose fluctuated between 52.90 percent (2006 – 07) and 56.45 percent (2010 – 11) during the period 2004-05 to 2011-12. Subsequently, Religious visit fluctuated between 33.57 percent (2007 – 08) and 38.83 percent (2009 – 10) in the same period. For Leisure purpose, it was between 4.47 percent (2009 – 10) and 7.76 percent (2006 – 07). Tourists in “Others” category which consists of non-surveyed destinations fluctuated between 2.38 percent (2009 – 10 and also in 2010 – 11) to 4.49 percent (2005 – 06) during the periods 2004-05 to 2011-12. However, if one takes into consideration the last two years of the study period i.e., 2010 – 11 and 2011 – 12, the share of Business and Leisure tourists flow fell by nearly 2 percent and 1 percent respectively while the share of Religious and “Others” tourists flow increased by 1 percent each, when compared with the previous year. Business, Leisure, Religion and “Others” escalated by 10.38 percent, 11.66 percent, 16.29 percent and 23.99 percent respectively when the periods 2010 – 11 and 2011 – 12 are compared.
TABLE – 3.5
Purpose of Tourist Visiting the State (Gujarat)

(in lakhs)

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<tr>
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<tbody>
<tr>
<td></td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
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<tr>
<td>Business</td>
<td>40.70</td>
<td>53.47</td>
<td>58.72</td>
<td>54.86</td>
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<td>52.90</td>
<td>77.58</td>
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<td>9.58</td>
<td>7.76</td>
<td>10.35</td>
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<td>Religion</td>
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<td>38.41</td>
<td>35.89</td>
<td>43.30</td>
<td>35.08</td>
<td>47.41</td>
<td>33.57</td>
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<td>Others*</td>
<td>3.40</td>
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<td>4.80</td>
<td>4.49</td>
<td>5.26</td>
<td>4.26</td>
<td>5.89</td>
<td>4.17</td>
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<td>141.23</td>
<td>100</td>
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Note: Figures in the individual columns may not exactly add up to total due to round-off.
*Others: Non-surveyed destinations
3.2.2 TOURIST FLOW AT INDIVIDUAL DESTINATIONS

To get a comprehensive idea regarding tourist purpose and destination for visiting Gujarat it is pertinent if an attempt is made to study the purpose of tourist flow along with individual destinations for the last four years of the study period i.e. 2008 – 09 to 2011 – 12 so as. It was felt that a special comparison between 2010 – 11 and 2011 – 12 is imperative, because being the last two years of the study period it is important to know the latest growth position of the centers.

The annual flow of tourists at individual destinations is shown in Table 3.6 for the years 2008 – 09 to 2011 – 12. Ahmedabad, Ambaji, Dwarka, Surat, Vadodara and Rajkot are top six tourist destinations of the State. In all four years, these six destinations record more than 40 percent of total tourist flow to the State. If Palitana’s, Girnar’s and Somnath’s shares are added then the combined share moves to 50 percent of the gross tourist flow, except for the year 2008-09 when it was 48 percent. Out of the nine destinations, Ahmedabad, Surat, Vadodara and Rajkot are well known “Business centers” while Ambaji, Dwarka, Palitana, Girnar and Somnath are important “Religious centers” of the State.

If we take into consideration the annual growth of tourist flow for the State as a whole, between 2010–11 and 2011–12 it was 12.88 percent. In absolute terms the tourist flow was 198.12 lakhs in 2010 – 11 which increased to 223.64 lakhs in 2011 – 12 (Table – 3.6). Center wise analysis shows that “Business centers” continues to remain top draw tourist destination for all the four years, i.e. 2008 09 to 2011 – 12. If last two years are taken into account then it could be seen from the Table 3.6 that little more than 91 lakh persons (46.01 percent) in 2010 – 11 and about 102 lakh persons (45.42 percent) in 2011 – 12 visited “Business centers”. Though in absolute terms the tourist flow increased, but in percentage terms a decline is noted.
### Table: 3.6

Tourist Flow at Individual Destinations (Gujarat)

| Destination | 2008-09 | 2009-10 | 2010-11 | 2011-12 | Growth (%)
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<td>%</td>
<td>No.</td>
<td>%</td>
<td>No.</td>
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<td>23.20</td>
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<td>5043609</td>
<td>22.55</td>
<td>12.76</td>
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| Gross Total              | 15807535 | 100   | 17011247 | 100   | 19811936 | 100   | 22363952 | 100   | 12.88 |

Note: Figures in the individual percentage columns may not exactly add up-to the total due to round-off
Source: GITCO; TFIS Annual Report, 2011-12

"Religious centers” comes at a distant second position with 28.56 percent and 29.23 percent of the total tourist flow for the year 2010 – 11 and 2011 – 12 respectively, followed by “Leisure centers”. However, if one considers the shifts, the share of “Business” and “Leisure purpose” tourists flow fell by 0.49 percent and 0.05 percent respectively when 2010 – 11 and 2011 – 12 periods are compared. The share of “Religious purpose” tourists increased by 0.67 percent or by about 1 percent in 2011 – 12, when compared to previous year, i.e. 2010 – 11.
In case of “Leisure centers” it seems that it is not a very popular option for the tourists who visit the State. Only 3 percent of the total tourists visiting the State visited “Leisure centers” in the last four years, i.e., 2008 – 09 to 2011 – 12. Recently Government of Gujarat has recognized the importance of the Leisure tourism. With the promotional campaign launched by the Tourism Corporation of Gujarat Ltd. (TCGL) in 2011 – 12 for boosting the tourists flow in the State, along with multifarious promotional activities, they are revamping the infrastructure of its hotels and resorts with an extra special attention in the Leisure centers.7

Tourists classified under the domain “Non Surveyed Destinations” are tourists not surveyed for their individual destinations by Government of Gujarat in general or TCGL in particular but recorded as tourists are projected in Table 3.6. It is expected that in very near future tourist under this category will be properly surveyed and will be placed under respective individual destinations.

From the table 3.6 one can gather that in 2010 – 11, 44.73 lakh (22.58 percent) of the total tourist flow of the State comes under “Non Surveyed Destinations” tourist. By 2011 – 12 the number of tourist flow increased to 50.44 lakhs or 22.55 percent of the gross tourist flow in the State. In other words though in absolute number the tourist flow increased by about 6 lakhs, in percentage terms it fell by 0.03 percent over 1 year period i.e. 2010 – 11 and 2011 – 12. Again, when last two years, i.e. 2010-11 and 2011-12 are compared, growth column shows that tourists flow at the “Religious centers” grew at 15.51 percent followed by “Non Surveyed” destinations with 12.76. “Business centers” and “Leisure centers” recorded 11.42 percent and 10.99 percent growth. In short, though “Business centers” are the most visited places, it is the “Religious centers” whose growth is the fastest.

3.2.3 CLASS-WISE TOURISTS VISITING THE STATE (2002 – 03 TO 2011 – 12)

Table 3.7 provides information regarding the Class-wise Tourists visiting the State for the years 2002 – 03 to 2011 – 12. For analysis purpose, the years 2009 – 10 to 2011 – 12 have been taken into account. The reason being the classes have been redefined

7 Times of India, Wednesday, October 03, 2012; “Gujarat tourism corporation to revamp hotel infrastructure”
since April 2009 on the basis of room tariff range, which is supposed to be technically more refined than the previous methods used by TCGL\(^8\).

Gujarat Tourism has classified tourists into three broad heads (i) High class, (ii) Medium class, and (iii) Economy class, on the basis of room tariff. Table 3.7 shows that for the year 2011-12, as far as tourists are concerned, “Economy class” has dominated the class-wise tourist flow. “High class” tourist category is a distant second position followed by “Medium class” tourists. For the year 2009-10, the total “Economy class” tourist flow of the State was 93.25 lakhs, i.e., 54.82 percent of the total tourist flow of the State. It was followed by “High class” tourists accounting for 46.82 lakhs (27.52 percent) and “Medium class” with 30.04 lakhs (17.66 percent). By 2011-12, though the ranking remained the same, the “High class” tourist flow share increased to 29.25 percent, a net gain of 1.73 percent over 2009-10 period. In the case of “Medium class”, the gain was 5.95 percent while in the case of “Economy class”, the tourist flow actually fell by 7.68 percent over the above-mentioned period. If past trend is an indicator of future course, then from Table 3.7 one could generalize that in the coming years “High class” and “Medium class” tourists will capture an important segment of the tourist flow in the State. Again, it is interesting to note that “High class” tourists visiting the State are appreciably more than that of “Medium class” tourists. This indicates that an extra effort by TCGL, in the form of providing international level of infrastructures like hotels, transport, food etc., can help draw more “High class” tourists to the State. With the advent of more and more “High class” tourists, high spending is expected. This spending will inject new rupee into the local economy. A percentage of each new rupee will be spent in the local market by the recipient and this will be spent and re-spent and thus will create a “Multiplier-effect” with the end result of generating more and more employment and income for the State. As mentioned earlier, tourism department has recognized this aspect and from the year 2011 – 12 it has started revamping the infrastructures like hotels and resorts in both, in numbers and in quality. Though the main attention is for giving maximum satisfaction to all classes of tourists visiting the State, it is felt that special attention should be given to “High class” and recently nomenclatured “Luxury class”, a class higher than “High class” tourists, for both foreigners as well as domestic.

\(^8\)GITCO; TFIS Annual Report, 2011-12
## Table – 3.7

Class-Wise Tourist Visiting the State (Gujarat)

(in lakhs)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
<td>No.</td>
<td>%</td>
</tr>
<tr>
<td>High</td>
<td>15.76</td>
<td>25.57</td>
<td>19.17</td>
<td>24.03</td>
<td>17.17</td>
<td>22.56</td>
<td>23.74</td>
<td>22.18</td>
<td>24.81</td>
<td>20.30</td>
</tr>
<tr>
<td>Medium</td>
<td>9.70</td>
<td>15.73</td>
<td>13.90</td>
<td>17.43</td>
<td>22.64</td>
<td>29.74</td>
<td>35.10</td>
<td>32.79</td>
<td>37.52</td>
<td>30.40</td>
</tr>
<tr>
<td>Economy</td>
<td>36.18</td>
<td>58.70</td>
<td>46.70</td>
<td>58.54</td>
<td>36.31</td>
<td>47.70</td>
<td>48.19</td>
<td>45.03</td>
<td>61.10</td>
<td>49.50</td>
</tr>
<tr>
<td>Total</td>
<td>61.64</td>
<td>100</td>
<td>79.77</td>
<td>100</td>
<td>76.12</td>
<td>100</td>
<td>107.03</td>
<td>100</td>
<td>123.43</td>
<td>100</td>
</tr>
</tbody>
</table>

**Note:** Figures in the individual columns may not exactly add up to the total due to round-off.

High: Accommodation units having tariff above Rs. 750 for double bed room
Medium: Accommodation units having tariff above Rs. 350 to Rs 749 for double bed room
Economy: Accommodation units having tariff up to Rs. 349 for double bed room

**Source:** GITCO; TFIS Annual Report, 2011-12
3.2.4 MONTH-WISE TOURIST FLOW (2002 - 03 TO 2011 - 12)

Table 3.8 projects the month-wise tourist flow in the State for the years 2002 - 03 to 2011 - 12, i.e., Tenth (Xth) and Eleventh (XIth) Five Years Plan periods. If month-wise analysis is made, then for the State, the months of April to July are the lean months. In the case of August, except the first two years, i.e., 2002-03 and 2003-04, rest of the years, i.e., 2004-05 to 2011-12, it comes under lean months. With minor variations, September to March are the peak months for the tourists visiting the State. In short, April to August are the months which can be dubbed as lean months and September to March are the peak months for the tourists visiting the State.
## TABLE - 3.8
Seasonal Variations in Tourist Flow (Gujarat)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Survey Destination Flow (in lakhs)</td>
<td>% of Annual Average</td>
<td>Survey Destination Flow (in lakhs)</td>
<td>% of Annual Average</td>
<td>Survey Destination Flow (in lakhs)</td>
</tr>
<tr>
<td>April</td>
<td>3.38</td>
<td>66</td>
<td>5.70</td>
<td>86</td>
<td>6.09</td>
</tr>
<tr>
<td>May</td>
<td>4.68</td>
<td>91</td>
<td>6.25</td>
<td>94</td>
<td>6.81</td>
</tr>
<tr>
<td>June</td>
<td>5.30</td>
<td>84</td>
<td>6.22</td>
<td>93</td>
<td>5.79</td>
</tr>
<tr>
<td>July</td>
<td>3.93</td>
<td>77</td>
<td>5.91</td>
<td>89</td>
<td>5.64</td>
</tr>
<tr>
<td>August</td>
<td>5.42</td>
<td>106</td>
<td>7.33</td>
<td>110</td>
<td>5.69</td>
</tr>
<tr>
<td>Oct</td>
<td>5.32</td>
<td>104</td>
<td>6.36</td>
<td>96</td>
<td>5.90</td>
</tr>
<tr>
<td>Nov</td>
<td>6.57</td>
<td>128</td>
<td>6.92</td>
<td>104</td>
<td>7.31</td>
</tr>
<tr>
<td>Dec</td>
<td>4.87</td>
<td>95</td>
<td>6.84</td>
<td>103</td>
<td>6.33</td>
</tr>
<tr>
<td>Jan</td>
<td>5.32</td>
<td>104</td>
<td>8.25</td>
<td>124</td>
<td>5.80</td>
</tr>
<tr>
<td>Feb</td>
<td>5.50</td>
<td>107</td>
<td>5.45</td>
<td>82</td>
<td>5.42</td>
</tr>
<tr>
<td>March</td>
<td>5.24</td>
<td>102</td>
<td>5.38</td>
<td>81</td>
<td>6.29</td>
</tr>
<tr>
<td>Total</td>
<td>61.65</td>
<td>79.81</td>
<td>76.12</td>
<td>107.03</td>
<td>123.43</td>
</tr>
<tr>
<td>Annual Average</td>
<td>5.14</td>
<td>6.65</td>
<td>6.34</td>
<td>8.92</td>
<td>10.29</td>
</tr>
</tbody>
</table>

-Contd.-
<table>
<thead>
<tr>
<th>Month</th>
<th>2007 - 08</th>
<th>2008 - 09</th>
<th>2009 - 10</th>
<th>2010 - 11</th>
<th>2011 - 12</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Survey Destination Flow (in lakhs)</td>
<td>% of Annual Average</td>
<td>Survey Destination Flow (in lakhs)</td>
<td>% of Annual Average</td>
<td>Survey Destination Flow (in lakhs)</td>
</tr>
<tr>
<td>April</td>
<td>10.16</td>
<td>86</td>
<td>12.96</td>
<td>98</td>
<td>13.02</td>
</tr>
<tr>
<td>May</td>
<td>9.73</td>
<td>83</td>
<td>12.94</td>
<td>98</td>
<td>13.16</td>
</tr>
<tr>
<td>June</td>
<td>9.46</td>
<td>80</td>
<td>12.66</td>
<td>96</td>
<td>12.59</td>
</tr>
<tr>
<td>July</td>
<td>9.74</td>
<td>83</td>
<td>12.05</td>
<td>92</td>
<td>11.80</td>
</tr>
<tr>
<td>August</td>
<td>10.23</td>
<td>87</td>
<td>12.00</td>
<td>91</td>
<td>13.07</td>
</tr>
<tr>
<td>Sept</td>
<td>12.70</td>
<td>108</td>
<td>13.94</td>
<td>106</td>
<td>13.65</td>
</tr>
<tr>
<td>Oct</td>
<td>13.18</td>
<td>112</td>
<td>12.99</td>
<td>99</td>
<td>14.92</td>
</tr>
<tr>
<td>Nov</td>
<td>13.50</td>
<td>115</td>
<td>13.98</td>
<td>106</td>
<td>14.05</td>
</tr>
<tr>
<td>Dec</td>
<td>14.80</td>
<td>126</td>
<td>14.92</td>
<td>113</td>
<td>16.10</td>
</tr>
<tr>
<td>Feb</td>
<td>12.58</td>
<td>107</td>
<td>12.53</td>
<td>95</td>
<td>16.45</td>
</tr>
<tr>
<td>March</td>
<td>11.93</td>
<td>101</td>
<td>12.30</td>
<td>93</td>
<td>14.90</td>
</tr>
<tr>
<td>Total</td>
<td>141.23</td>
<td>158.08</td>
<td>170.11</td>
<td>198.12</td>
<td>223.64</td>
</tr>
<tr>
<td>Annual Average</td>
<td>11.77</td>
<td>13.17</td>
<td>14.18</td>
<td>16.51</td>
<td>18.64</td>
</tr>
</tbody>
</table>

Note: Figures in the individual columns may not exactly add up to the total due to round-off.
Source: GITCO; TFIS Annual Report, 2011-12
3.2.5 TOURIST FLOW FROM OTHER INDIAN STATES (2002 – 03 TO 2011 – 12)

According to Table 3.9, 14.73 lakh tourists visited the State from “Other Indian States” (OIS) in 2002 – 03 i.e. the beginning of Tenth Five Year plan. By the end of plan period, i.e. 2006 – 07, the tourist flow increased to 25.40 lakhs, an increase of about 11 lakh tourists for the year or at a annual growth rate of 11.45 percent. By the end of Eleventh Five Year plan, i.e. in 2011 – 12, the OIS tourist flow increased to 47.28 lakhs which was more than three times than that of 2002 – 03 period or nearly double of 2006 – 07 period. If CAGR for the period 2006 – 07 to 2011 – 12 is taken into account then it comes to 10.91 percent. Overall, i.e. 2002 – 03 to 2011 – 12, the CAGR is 12.37. During the year 2011 – 12, the State registered a positive growth of 8.56 percent over 2010 – 11. The growth in tourist flow from “Other Indian States” (OIS) during Tenth and Eleventh Five Year Plan periods did not follow any consistent pattern.

Table – 3.9

Tourist Flow from Other Indian States (Gujarat)

<table>
<thead>
<tr>
<th>Year</th>
<th>Tourist Flow (in lakhs)</th>
<th>% of Gross tourist flow in the State</th>
<th>Annual Growth %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002–03</td>
<td>14.73</td>
<td>23.89</td>
<td>-</td>
</tr>
<tr>
<td>2003–04</td>
<td>19.64</td>
<td>24.61</td>
<td>33.33</td>
</tr>
<tr>
<td>2004–05</td>
<td>16.76</td>
<td>22.02</td>
<td>(-) 14.66</td>
</tr>
<tr>
<td>2005–06</td>
<td>22.79</td>
<td>21.30</td>
<td>35.98</td>
</tr>
<tr>
<td>2006–07</td>
<td>25.40</td>
<td>20.57</td>
<td>11.45</td>
</tr>
<tr>
<td>2007–08</td>
<td>27.66</td>
<td>19.59</td>
<td>8.90</td>
</tr>
<tr>
<td>2008–09</td>
<td>32.27</td>
<td>20.42</td>
<td>16.67</td>
</tr>
<tr>
<td>2009–10</td>
<td>36.24</td>
<td>21.30</td>
<td>12.30</td>
</tr>
<tr>
<td>2010–11</td>
<td>43.55</td>
<td>21.98</td>
<td>20.17</td>
</tr>
<tr>
<td>2011–12</td>
<td>47.28</td>
<td>21.14</td>
<td>8.56</td>
</tr>
<tr>
<td>CAGR 2006-07 to 2011-12</td>
<td>10.91</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CAGR 2002-03 to 2011-12</td>
<td>12.37</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: CAGR- Compound Annual Growth Rate
Source: Table 3.3
While the years, 2003 – 04, 2005 – 06, 2006 – 07, 2008 – 09, 2009 – 10, and 2010 – 11 had shown double digit positive growth, there was negative growth in the year 2004 – 05. The years 2007-08 and 2011 – 12 though have positive growth it were in single digit, i.e., 8.90 percent and 8.56 percent respectively.

3.2.6 SEGMENT-WISE TOURIST FLOW FROM OTHER INDIAN STATES

In Table 3.10 an attempt has been made to project segment wise tourist flow from “Other Indian States” (OIS) for the year 2011 – 12. As State-wise data in respect of tourist flow from “Other Indian States” is available only for 2011 – 12, so the study is limited to one year only. Even otherwise year 2011 – 12 is being the latest period of the study, so it was felt that it will be appropriate to see the latest position regarding the state origin of the OIS tourist visiting Gujarat.

From Table 3.10, one can conclude that the state of Maharashtra tops the list with 34.32 percent of OIS tourist flow. GITCO, in one of its report in 2011 – 12, estimated that about 39.4 lakh Gujaratis (6 percent of total population of Gujarat) live outside the State. About 23 lakhs or 59 percent of them live in Maharashtra. This may be the cause of Maharashtra dominating the scene. Rajasthan (15.95 percent), Uttar Pradesh (13.83 percent) and Madhya Pradesh (13.36 percent) though far behind Maharashtra, rank second, third and fourth respectively. The share of remaining States were “South Indian”, when taken as a whole, 8.43 percent, West Bengal (4.21 percent), Bihar (4.20 percent), “Other East Indian” states (2.93 percent), and “Other North Indian” states (2.77 percent).

If center-wise analysis is made then “Business centers” with nearly 49 percent of the total tourist flow tops the list. “Religious centers” is the next important center with 26 percent of tourist flow. As for the “Leisure centers”, with only 2.60 percent of the tourist visiting the places, shows that the State’s leisure centers are yet not very popular amongst the “Other Indian States” (OIS) tourists. In the case of “Non Survey” tourists, it is surprising that even in 2011-12, nearly 23 percent of the “OIS” tourists (true for individual states also) are not yet properly surveyed.

While analyzing, State vis-à-vis destination centers, again “Business centers” is the most favored destinations for all the states individually also. 53 percent of the total...
tourists of Uttar Pradesh and also “Other North Indian States” visited “Business centers” during 2011-12. From “South India” 52 percent, Maharashtra 51 percent, Bihar 50 percent are the other states having 50 percent or more tourists visiting “Business centers” during the above-mentioned period. For rest of the states, tourists visiting “Business centers” fluctuated between 47 percent and 43 percent. In short, “Business centers” are the most favored destinations for the tourists visiting Gujarat.
### Table 3.10

Segment wise Tourist flow from Other Indian States for the year 2011 – 12 (GUJARAT)

<table>
<thead>
<tr>
<th>Destination</th>
<th>Maharashtra</th>
<th>Madhya Pradesh</th>
<th>Rajasthan</th>
<th>Uttar Pradesh</th>
<th>Bihar</th>
<th>West Bengal</th>
<th>Other North Indian States</th>
<th>Other East Indian States</th>
<th>South India</th>
<th>Total</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Centers</td>
<td>828465 (35.98)</td>
<td>277814 (12.07)</td>
<td>324506 (14.99)</td>
<td>345166 (14.99)</td>
<td>99702 (4.33)</td>
<td>85083 (3.70)</td>
<td>69552 (3.02)</td>
<td>65582 (2.85)</td>
<td>206700 (8.98)</td>
<td>2302570</td>
<td>100</td>
</tr>
<tr>
<td>Leisure Centers</td>
<td>69424 (56.56)</td>
<td>14841 (12.09)</td>
<td>15889 (12.94)</td>
<td>10336 (8.42)</td>
<td>2600 (2.12)</td>
<td>2376 (1.94)</td>
<td>1144 (0.93)</td>
<td>1030 (0.84)</td>
<td>5105 (4.16)</td>
<td>122745</td>
<td>100</td>
</tr>
<tr>
<td>Religious Centers</td>
<td>358585 (29.01)</td>
<td>196424 (15.89)</td>
<td>243763 (19.72)</td>
<td>150968 (12.21)</td>
<td>51554 (4.17)</td>
<td>66652 (5.39)</td>
<td>30806 (2.49)</td>
<td>40835 (3.30)</td>
<td>96720 (7.82)</td>
<td>1236307</td>
<td>100</td>
</tr>
<tr>
<td>Non-survey</td>
<td>365881 (34.32)</td>
<td>142416 (13.36)</td>
<td>170104 (15.95)</td>
<td>147482 (13.83)</td>
<td>44803 (4.20)</td>
<td>44878 (4.21)</td>
<td>29556 (2.77)</td>
<td>31288 (2.93)</td>
<td>89842 (8.43)</td>
<td>1066250</td>
<td>100</td>
</tr>
<tr>
<td>Grand Total</td>
<td>1622355 (34.32)</td>
<td>631495 (13.36)</td>
<td>754262 (15.95)</td>
<td>653952 (13.83)</td>
<td>198659 (4.20)</td>
<td>198989 (4.21)</td>
<td>131058 (2.77)</td>
<td>138735 (2.93)</td>
<td>398367 (8.43)</td>
<td>4727872</td>
<td>100</td>
</tr>
</tbody>
</table>

Note: Figures in bracket indicate percentage of the total
Source: GITCO; TFIS Annual Report, 2011-12
3.2.7 STATE-WISE DESTINATION PREFERENCE

Table 3.11 gives the destination preference of the “Other Indian States” (OIS) tourists visiting the State during the year 2011-12. If “Other Indian States” (OIS) tourist flow is taken as a whole, then Ahmedabad seems to be the most preferred destination with 13 percent share of the total tourists visiting the State. It is followed by Dwarka (11 percent), Surat (7 percent), Vadodara (5 percent), Ambaji (4 percent), Rajkot, Palitana and Gandhinagar (3 percent each) and Gandhidham, Girnar, Somnath, Bahucharaji and Jamnagar (2 percent each).

When State-wise destination preference is taken into account then it can be seen that Ahmedabad is the most preferred destination for tourists, from “Bihar” (24 percent), “Madhya Pradesh”, “Rajasthan” and “South India States” (15 percent each) and “Maharashtra” (12 percent). Dwarka on the other hand, is the most favored destination for “West Bengal” (25 percent), “Other East Indian States” (23 percent), “Other North Indian States” (18 percent) and “Uttar Pradesh” (13 percent).

In short, Ahmedabad and Dwarka are the most sort-after destinations by tourists of OIS. One, i.e., Ahmedabad is a well-known commercial hub of India and the other, i.e., Dwarka is a famous religious town and that may be the reason for their popularity amongst the visitors.
Table – 3.11
State Wise Destination Preference (Gujarat)

<table>
<thead>
<tr>
<th>Indian State</th>
<th>Ahmedabad</th>
<th>Dwarka</th>
<th>Surat</th>
<th>West Bengal</th>
<th>Other North Indian State</th>
<th>Other East Indian State</th>
<th>South India</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rajasthan</td>
<td>Ahmedabad</td>
<td>Dwarka</td>
<td>Surat</td>
<td>West Bengal</td>
<td>Other North Indian State</td>
<td>Other East Indian State</td>
<td>South India</td>
</tr>
<tr>
<td>Uttar Pradesh</td>
<td>Dwarka</td>
<td>Surat</td>
<td>Vadodara</td>
<td>West Bengal</td>
<td>Other North Indian State</td>
<td>Other East Indian State</td>
<td>South India</td>
</tr>
<tr>
<td>Maharastra</td>
<td>Ahemdabad</td>
<td>Dwarka</td>
<td>Surat</td>
<td>West Bengal</td>
<td>Other North Indian State</td>
<td>Other East Indian State</td>
<td>South India</td>
</tr>
</tbody>
</table>

Note: (i) Figures mentioned below the name of city/destination indicate percentage of the total
(ii) The destinations with upto 1% share have been omitted

Source: GITCO; TFIS Annual Report, 2011-12
3.2.8 SHARE OF TOP 10 STATES/UT OF INDIA IN NUMBER OF DOMESTIC TOURIST VISITS DURING 2001 TO 2012

Here an attempt is made to access Gujarat's position as against other Indian states in respect to domestic tourist visits from 2001 to 2012. From Table 3.12, it can be seen that Gujarat's rank fluctuated between 9th and 11th between the periods 2002 to 2012. In the year 2001, Gujarat's rank was 7th, the best ever, the level the State was unable to reach afterwards. If last 12 years are taken into account then tourism in Gujarat till date seems to lack focus in making the State a tourist favorable sector as it is in states like Madhya Pradesh, Rajasthan, and Uttarakhand. These are the states, with vigorous tourism promoting policies, are slowly becoming tourist hubs of the country. The top states like Andhra Pradesh, Tamil Nadu, Uttar Pradesh, Karnataka and Maharashtra have already many well-known tourist centers, and thus a large number of visitors opt for these places.
**TABLE 3.12**

*Domestic Tourists (Gujarat)*

*Ranking of Top Ten States in Terms of Numbers of Visitors During 2001-2012 (in % Terms)*

<table>
<thead>
<tr>
<th>Ranking/Years</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Uttar Pradesh</td>
<td>29.09</td>
<td>Uttar Pradesh</td>
<td>26.52</td>
<td>Uttar Pradesh</td>
<td>Andhra Pradesh</td>
</tr>
<tr>
<td>2</td>
<td>Andhra Pradesh</td>
<td>22.22</td>
<td>Andhra Pradesh</td>
<td>22.44</td>
<td>Andhra Pradesh</td>
<td>Uttar Pradesh</td>
</tr>
<tr>
<td>3</td>
<td>Tamil Nadu</td>
<td>10.07</td>
<td>Tamil Nadu</td>
<td>14.77</td>
<td>Tamil Nadu</td>
<td>Tamil Nadu</td>
</tr>
<tr>
<td>4</td>
<td>Karnataka</td>
<td>5.97</td>
<td>Uttarakhand</td>
<td>3.93</td>
<td>Rajasthan</td>
<td>Karnatak</td>
</tr>
<tr>
<td>5</td>
<td>Uttarakhand</td>
<td>4.04</td>
<td>Maharashtra</td>
<td>3.64</td>
<td>West Bengal</td>
<td>Rajasthan</td>
</tr>
<tr>
<td>6</td>
<td>Maharashtra</td>
<td>3.59</td>
<td>West Bengal</td>
<td>3.28</td>
<td>Maharashtra</td>
<td>Maharashtra</td>
</tr>
<tr>
<td>7</td>
<td>Gujarat</td>
<td>3.50</td>
<td>Karnataka</td>
<td>3.22</td>
<td>Karnataka</td>
<td>West Bengal</td>
</tr>
<tr>
<td>8</td>
<td>Rajasthan</td>
<td>3.28</td>
<td>Rajasthan</td>
<td>3.08</td>
<td>Uttarakhand</td>
<td>Uttarakhand</td>
</tr>
<tr>
<td>9</td>
<td>Bihar</td>
<td>2.56</td>
<td>Bihar</td>
<td>2.54</td>
<td>Gujarat</td>
<td>Madhya Pradesh</td>
</tr>
<tr>
<td>10</td>
<td>Jammu &amp; Kashmir</td>
<td>2.22</td>
<td>Haryana</td>
<td>2.38</td>
<td>Bihar</td>
<td>Bihar</td>
</tr>
</tbody>
</table>

| Gujarat (11th) | 2.13 | Gujarat (11th) | 2.12 |

| Top 10 Total (%) | 86.53 | 85.82 | 85.81 | 86.70 | 87.18 | 88.17 |
| Others (%)       | 13.47 | 14.18 | 14.19 | 13.30 | 12.82 | 11.83 |
| INDIA (%)        | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 | 100.00 |

Contd.-
<table>
<thead>
<tr>
<th>Year</th>
<th>Andhra Pradesh</th>
<th>Uttar Pradesh</th>
<th>Tamil Nadu</th>
<th>Karnataka</th>
<th>Maharashtra</th>
<th>U.P.</th>
<th>Madhya Pradesh</th>
<th>Rajasthan</th>
<th>Uttarakhand</th>
<th>Gujarat</th>
<th>West Bengal</th>
<th>Top 10 Total (%)</th>
<th>Others (%)</th>
<th>INDIA (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>24.30</td>
<td>23.57</td>
<td>22.08</td>
<td>19.36</td>
<td>17.31</td>
<td>17.11</td>
<td>13.34</td>
<td>12.04</td>
<td>11.85</td>
<td>11.85</td>
<td>10.26</td>
<td>87.06</td>
<td>12.04</td>
<td>100.00</td>
</tr>
<tr>
<td>2008</td>
<td>23.57</td>
<td>22.18</td>
<td>19.64</td>
<td>17.31</td>
<td>17.11</td>
<td>17.06</td>
<td>13.34</td>
<td>12.04</td>
<td>11.85</td>
<td>11.85</td>
<td>10.26</td>
<td>87.03</td>
<td>12.07</td>
<td>100.00</td>
</tr>
<tr>
<td>2009</td>
<td>22.18</td>
<td>20.06</td>
<td>19.16</td>
<td>15.94</td>
<td>17.06</td>
<td>17.06</td>
<td>13.34</td>
<td>12.07</td>
<td>11.85</td>
<td>11.85</td>
<td>10.26</td>
<td>86.49</td>
<td>13.51</td>
<td>100.00</td>
</tr>
<tr>
<td>2010</td>
<td>20.16</td>
<td>19.84</td>
<td>18.16</td>
<td>15.94</td>
<td>17.06</td>
<td>17.06</td>
<td>13.34</td>
<td>12.07</td>
<td>11.85</td>
<td>11.85</td>
<td>10.26</td>
<td>85.62</td>
<td>14.38</td>
<td>100.00</td>
</tr>
<tr>
<td>2011</td>
<td>19.56</td>
<td>19.34</td>
<td>17.84</td>
<td>16.25</td>
<td>15.94</td>
<td>17.06</td>
<td>13.34</td>
<td>12.07</td>
<td>11.85</td>
<td>11.85</td>
<td>10.26</td>
<td>85.07</td>
<td>14.93</td>
<td>100.00</td>
</tr>
<tr>
<td>2012</td>
<td>19.96</td>
<td>19.71</td>
<td>17.77</td>
<td>16.25</td>
<td>15.94</td>
<td>17.06</td>
<td>13.34</td>
<td>12.07</td>
<td>11.85</td>
<td>11.85</td>
<td>10.26</td>
<td>84.48</td>
<td>15.52</td>
<td>100.00</td>
</tr>
</tbody>
</table>

Note: Figures mentioned below the name of state indicate percentage of the total domestic tourist arrivals. Source: Government of India, Department of Tourism, New Delhi; India Tourism Statistics, 2001-2014.
3.2.9 NRI/FOREIGNER TOURIST FLOW IN THE STATE

Table 3.13 gives a glimpse of NRI and foreign tourist flow to the State for the years 2002 – 03 to 2011 – 12. As per the table, 0.65 lakh “NRI/Foreigner” tourists had visited Gujarat during 2002 – 03. In percentage terms it comes to little more than 1 percent of gross tourists flow to the State. Of the 0.65 lakh “NRI/Foreigner” tourists, 0.28 lakh were NRI’s and the rest, i.e., 0.37 lakh were Foreigners. By 2011 – 12 the total “NRI/Foreigners” flow increased to 4.60 lakhs or about 2 percent of total tourist flow to the State. Though, in percentage terms the share of “NRI/Foreigner” tourist flow increased by 1 percent only in ten years’ duration, but considering Compound Annual Growth Rate (CAGR) of 21.61 percent looks quite impressive for the future.

Table – 3.13

<table>
<thead>
<tr>
<th>Year</th>
<th>NRI flow</th>
<th>Foreigners flow</th>
<th>Total NRI/Foreigners flow</th>
<th>% of total State Tourist flow</th>
</tr>
</thead>
<tbody>
<tr>
<td>2002 – 03</td>
<td>0.28</td>
<td>0.37</td>
<td>0.65</td>
<td>1.05</td>
</tr>
<tr>
<td>2003 – 04</td>
<td>0.34</td>
<td>0.31</td>
<td>0.65</td>
<td>0.81</td>
</tr>
<tr>
<td>2004 – 05</td>
<td>0.38</td>
<td>0.22</td>
<td>0.60</td>
<td>0.79</td>
</tr>
<tr>
<td>2005 – 06</td>
<td>0.98</td>
<td>0.76</td>
<td>1.74</td>
<td>1.63</td>
</tr>
<tr>
<td>2006 – 07</td>
<td>1.10</td>
<td>0.97</td>
<td>2.07</td>
<td>1.68</td>
</tr>
<tr>
<td>2007 – 08</td>
<td>1.24</td>
<td>1.05</td>
<td>2.29</td>
<td>1.62</td>
</tr>
<tr>
<td>2008 – 09</td>
<td>1.18</td>
<td>1.14</td>
<td>2.95</td>
<td>1.86</td>
</tr>
<tr>
<td>2009 – 10</td>
<td>2.03</td>
<td>1.07</td>
<td>3.10</td>
<td>1.82</td>
</tr>
<tr>
<td>2010 – 11</td>
<td>2.57</td>
<td>1.39</td>
<td>3.95</td>
<td>1.99</td>
</tr>
<tr>
<td>2011 – 12</td>
<td>2.85</td>
<td>1.75</td>
<td>4.60</td>
<td>2.06</td>
</tr>
<tr>
<td>CAGR:</td>
<td></td>
<td></td>
<td></td>
<td>21.61</td>
</tr>
</tbody>
</table>

Source: Table 3.3
3.2.10 NRI/FOREIGNER TOURIST DESTINATION PREFERENCE

The share of “NRI/Foreigner” tourists flow to different destinations for the latest three years is given in Table - 3.14 and 3.15. Here an attempt is made to see the places or destinations where NRI’s and Foreigner tourists visit most. From the table 3.14 it is clear that Bhuj is the most popular place followed by Mundra for the foreigners. It is interesting to note that other than the “Business centers”, Mandvi a “Leisure center” is the only other center in the tour map of foreigners. The share of Foreigners flow to total tourist flow at Mandvi fluctuated between 1.46 percent and 1.78 percent between the period 2009 – 10 and 2011 – 12.

Table – 3.14

Significant Share of Foreigner Tourist at a Destination Level Flow –
A Comparison of Last Three Years (Gujarat)

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Destination</strong></td>
<td><strong>%</strong></td>
<td><strong>Center</strong></td>
</tr>
<tr>
<td>Mundra</td>
<td>5.36</td>
<td>Business</td>
</tr>
<tr>
<td>Bhuj</td>
<td>4.72</td>
<td>Business</td>
</tr>
<tr>
<td>Jamnagar</td>
<td>2.99</td>
<td>Business</td>
</tr>
<tr>
<td>Mandvi</td>
<td>1.78</td>
<td>Leisure</td>
</tr>
<tr>
<td>Morbi</td>
<td>1.29</td>
<td>Business</td>
</tr>
<tr>
<td>Ahmedabad</td>
<td>1.27</td>
<td>Business</td>
</tr>
<tr>
<td>Bhavnagar</td>
<td>1.19</td>
<td>Business</td>
</tr>
<tr>
<td>Vadodara</td>
<td>0.98</td>
<td>Business</td>
</tr>
</tbody>
</table>

**Note:**
(i) Percentage column shows foreigner flow share in total flow at a destination
(ii) The destinations with less than 1% share have been omitted

**Source:** GITCO; TFIS Annual Report, 2011-12
### TABLE – 3.15

**Significant Share of NRI Tourist at a Destination Level Flow –**

**A Comparison of Last Three Years (Gujarat)**

<table>
<thead>
<tr>
<th>Destination</th>
<th>2009 – 10</th>
<th>%</th>
<th>Center</th>
<th>2010 – 11</th>
<th>%</th>
<th>Center</th>
<th>2011 – 12</th>
<th>%</th>
<th>Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ahmedabad</td>
<td>2.67</td>
<td>Business</td>
<td>Ahmedabad</td>
<td>2.65</td>
<td>Business</td>
<td>Vadodara</td>
<td>2.22</td>
<td>Business</td>
<td></td>
</tr>
<tr>
<td>Sasan</td>
<td>2.40</td>
<td>Leisure</td>
<td>Sasan</td>
<td>2.21</td>
<td>Leisure</td>
<td>Surat</td>
<td>2.17</td>
<td>Business</td>
<td></td>
</tr>
<tr>
<td>Vadodara</td>
<td>2.17</td>
<td>Business</td>
<td>Bhavnagar</td>
<td>2.12</td>
<td>Business</td>
<td>Bhavnagar</td>
<td>2.11</td>
<td>Business</td>
<td></td>
</tr>
<tr>
<td>Bhavnagar</td>
<td>1.87</td>
<td>Business</td>
<td>Gandhinagar</td>
<td>2.07</td>
<td>Business</td>
<td>Ahmedabad</td>
<td>2.05</td>
<td>Business</td>
<td></td>
</tr>
<tr>
<td>Surat</td>
<td>1.80</td>
<td>Business</td>
<td>Palitana</td>
<td>2.07</td>
<td>Religious</td>
<td>Gandhinagar</td>
<td>2.05</td>
<td>Business</td>
<td></td>
</tr>
<tr>
<td>Palitana</td>
<td>1.57</td>
<td>Religious</td>
<td>Vadodara</td>
<td>2.04</td>
<td>Business</td>
<td>Sasan</td>
<td>2.05</td>
<td>Leisure</td>
<td></td>
</tr>
<tr>
<td>Girnar</td>
<td>1.54</td>
<td>Religious</td>
<td>Porbandar</td>
<td>1.83</td>
<td>Business</td>
<td>Palitana</td>
<td>1.90</td>
<td>Religion</td>
<td></td>
</tr>
<tr>
<td>Gandhinagar</td>
<td>1.49</td>
<td>Business</td>
<td>Rajkot</td>
<td>1.72</td>
<td>Business</td>
<td>Rajkot</td>
<td>1.75</td>
<td>Business</td>
<td></td>
</tr>
</tbody>
</table>

**Note:**
(i) Percentage column shows NRI flow share in total flow at a destination
(ii) The destinations less than 1% share have been omitted

**Source:** GITCO; TFIS Annual Report, 2011-12

In the case of NRI tourist flow, for the years 2009 – 10 and 2010 – 11, Ahmedabad a “Business center” was the most popular visiting place followed by Sasan a “Leisure center”. In 2011 – 12, there was an important shift in the preferential list with Vadodara being the most favored followed by Surat. Ahmedabad which topped the list in 2009 – 10 and again in 2010 – 11 had shifted to fourth place in 2011 – 12. It seems Palitana, a “Religious center”, is quite popular place for NRI tourist as in all the three years it finds a place amongst the popular visiting destinations in the State. In short, as in the case of Foreigner tourists, NRI tourist also favors “Business centers” the most. The only difference is for Foreigner tourists, other then “Business centers”, Mandvi which happen to be a “Leisure center” is the only other center they visit; whereas NRI tourists, along with “Business centers” they also visit “Leisure center” like Sasan and “Religious centers” like Palitana and to a certain extent Girnar, in relatively sufficient numbers.
3.2.11 FOREIGN TOURIST ORIGIN

Table 3.16 manifests the origin of foreign tourists visiting the State. Here an attempt has been made to analyze the number of tourists and their country of origin visiting the State. When the countries are ranked as per tourists flow, one distinctive aspect can be visualized that the top ten countries remained unchanged except some minor changes in ranking among themselves. As for the “Foreign” tourists visiting Gujarat, in the year 2007 – 08, nearly 85 thousand tourists visited the State. Out of the 85 thousand foreign tourists, 13,626 or 16.06 percent of the total foreign tourists flow were from United Kingdom. From France 7873 or 9.28 percent tourists visited the State and occupied second position followed by USA with 7529 (8.87 percent) Australia with 4759 persons (5.61 percent), Japan with 2705 (3.19 percent) persons, Canada with 2241 or 2.64 percent and from Singapore the tourist flow was 1651 or 1.95 percent. In 2008 – 09, the foreign tourists visiting the State increased to 1,14,390, an increase of 29,536 persons over the previous year. An interesting feature in 2008 – 09 period was that of China and Italy’s entry in the top ten league. During the period 3955 Chinese and 6087 Italians visited Gujarat, occupying 8th and 5th position respectively amongst top ten countries. In 2010 – 11, the foreign tourists flow to the State increased to 1,07,258 and by 2011 – 12 the foreign visitors flow touched 1,35,749 marks. In terms of Annual Growth Rate it comes to 26.56 percent (Table – 3.17). UK, USA, France, Italy and Singapore are the top five originating country of foreign tourists visiting the State for various purposes (2011-12), be it Business purpose, Leisure or both. As for the religious visit there is hardly any foreigners (negligible in numbers), visiting places of religious importance (Table – 3.14). One important aspect comes out from the Table 3.16 is that while tourists flow from Singapore increased over the period and its rank shifted from 8th position in the year 2007 – 08 to 5th position by 2011 – 12, Germany’s rank fell from 5th to 10th during the same period. When the year 2007 – 08 and 2011 – 12 are compared, the CAGR comes to 9.83 or about 10 percent (Table – 3.17). If annual growth of total foreign tourists flow is taken into consideration, then 26.56 percent growth in 2011 – 12 over the previous year is quite impressive. When tourist origin-wise CAGR is taken into account then Singapore was way ahead of other countries with 43 percent and Germany was at the bottom with just 3 percent growth. For other important origins, the CAGR fluctuated between 20 percent and 11 percent. In the case of tourists from
(nomenclatured as) “Others”, the tourists flow actually fell over the period 2007 – 08 to 2011 – 12 (−7 percent). The Government of Gujarat and TCGL in particular took into consideration this matter and in their 2012 – 13 Tourism policy, the TCGL is supposed to go all out to attract more foreign tourists especially from East and Far-East countries along with other countries.
TABLE -3.16

Foreign Tourist Origin with Percentage Share and Rank (Gujarat)

<table>
<thead>
<tr>
<th>Origin</th>
<th>2007-08</th>
<th>2008-09</th>
<th>2009-10</th>
<th>2010-11</th>
<th>2011-12</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>No</td>
<td>%</td>
<td>Rank</td>
<td>No</td>
<td>%</td>
</tr>
<tr>
<td>Australia</td>
<td>4759</td>
<td>5.61</td>
<td>4</td>
<td>6501</td>
<td>5.68</td>
</tr>
<tr>
<td>Canada</td>
<td>2241</td>
<td>2.64</td>
<td>7</td>
<td>3067</td>
<td>2.68</td>
</tr>
<tr>
<td>China</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>3955</td>
<td>3.46</td>
</tr>
<tr>
<td>France</td>
<td>7873</td>
<td>9.28</td>
<td>2</td>
<td>11482</td>
<td>10.04</td>
</tr>
<tr>
<td>Germany</td>
<td>4318</td>
<td>5.09</td>
<td>5</td>
<td>4632</td>
<td>4.05</td>
</tr>
<tr>
<td>Italy</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>6087</td>
<td>5.32</td>
</tr>
<tr>
<td>Japan</td>
<td>2705</td>
<td>3.19</td>
<td>6</td>
<td>3737</td>
<td>3.27</td>
</tr>
<tr>
<td>Singapore</td>
<td>1651</td>
<td>1.95</td>
<td>8</td>
<td>4037</td>
<td>3.53</td>
</tr>
<tr>
<td>UK</td>
<td>13626</td>
<td>16.06</td>
<td>1</td>
<td>25670</td>
<td>22.44</td>
</tr>
<tr>
<td>USA</td>
<td>7529</td>
<td>8.87</td>
<td>3</td>
<td>9064</td>
<td>7.92</td>
</tr>
<tr>
<td>Total of top 10 Countries</td>
<td>44,702</td>
<td>52.68</td>
<td>78,232</td>
<td>68.39</td>
<td>62,822</td>
</tr>
<tr>
<td>Others</td>
<td>40152</td>
<td>47.32</td>
<td>36158</td>
<td>31.61</td>
<td>19096</td>
</tr>
<tr>
<td>Total</td>
<td>84854</td>
<td>100.00</td>
<td>114390</td>
<td>100.00</td>
<td>81918</td>
</tr>
</tbody>
</table>

Note: Data is based on the currently still fragmented information and available for three years only i.e. from 2009 – 10 to 2011 – 12.
Source: GITCO; TFIS Annual Report, 2011-12
TABLE -3.17
Foreign Tourist Origin and their Growth Rate (Gujarat)

<table>
<thead>
<tr>
<th>Years</th>
<th>Australia</th>
<th>Canada</th>
<th>China</th>
<th>France</th>
<th>Germany</th>
<th>Italy</th>
<th>Japan</th>
<th>Singapore</th>
<th>UK</th>
<th>USA</th>
<th>Others</th>
<th>Total</th>
<th>Growth %</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007-08</td>
<td>4759</td>
<td>2241</td>
<td>NA</td>
<td>7873</td>
<td>4318</td>
<td>NA</td>
<td>2705</td>
<td>1651</td>
<td>13626</td>
<td>7529</td>
<td>40152</td>
<td>84854</td>
<td></td>
</tr>
<tr>
<td>2008-09</td>
<td>6501</td>
<td>3067</td>
<td>3955</td>
<td>11482</td>
<td>4632</td>
<td>6087</td>
<td>3737</td>
<td>4037</td>
<td>25670</td>
<td>9064</td>
<td>36158</td>
<td>114390</td>
<td>34.81</td>
</tr>
<tr>
<td>2009-10</td>
<td>4431</td>
<td>2082</td>
<td>2666</td>
<td>7390</td>
<td>2424</td>
<td>6772</td>
<td>2002</td>
<td>3217</td>
<td>20695</td>
<td>11140</td>
<td>19096</td>
<td>87918</td>
<td>(-) 28.39</td>
</tr>
<tr>
<td>2010-11</td>
<td>4265</td>
<td>3726</td>
<td>4419</td>
<td>10885</td>
<td>4622</td>
<td>8657</td>
<td>5097</td>
<td>5965</td>
<td>23148</td>
<td>9364</td>
<td>27110</td>
<td>107258</td>
<td>30.93</td>
</tr>
<tr>
<td>2011-12</td>
<td>8259</td>
<td>5223</td>
<td>7765</td>
<td>13305</td>
<td>4875</td>
<td>12516</td>
<td>6134</td>
<td>9697</td>
<td>25678</td>
<td>14957</td>
<td>27340</td>
<td>135749</td>
<td>26.56</td>
</tr>
<tr>
<td>CAGR</td>
<td>11.66</td>
<td>18.44</td>
<td>18.37</td>
<td>11.06</td>
<td>2.46</td>
<td>19.75</td>
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Source: GITCO; TFIS Annual Report, 2011-12
3.2.12 SHARE OF TOP 10 STATES/UT OF INDIA IN NUMBER OF FOREIGN TOURIST VISITS DURING 2001 TO 2012

As compared to domestic tourist visits, in the case of foreign tourist visits, Gujarat's position is still worse. From 2001 to 2012, the State is nowhere near the top ten states of the country (Table 3.18). In fact, Gujarat's rank fluctuated between 14th and 18th when the period 2001 to 2012 is taken into account. The efforts Gujarat is making to draw foreign tourists to the State till date seems not sufficient.

Thus, to attract more foreign tourists to the State, Government of Gujarat has to put in much more effort to improve tourism related infrastructures, and more vigorous promotional and marketing strategies are needed. In spite of roping in a top personality like Mr. Amitabh Bachchan as a “Brand Ambassador” and featuring a series of “Khushboo Gujarat Ki” documentaries, Gujarat doesn't seem to benefit much yet to attract tourists.
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Source: Government of India, Department of Tourism, New Delhi; India Tourism Statistics, 2001-2014
3.3 STRUCTURE AND WORKING OF TOURISM CORPORATION OF GUJARAT LIMITED (TCGL)

As mentioned earlier, the modern concept of tourism—planning, marketing and management was adopted by the State Government in 1973, i.e., some 13 years after the formation of the State. It was for the first time that a separate Tourism Department was established in 1973, to identify and help promote tourist destinations of the State. In 1978, i.e., after five long years since the formation of a separate Tourism Department in the State, the State Government realized that a specialized body to look after "Tourism" of the State was the need of the hour. Thus, TCGL or Tourism Corporation of Gujarat Limited was born. This body was created exclusively as a Corporation and was entrusted with the task of undertaking and developing tourism related activities in the State.

Here, an attempt is made to look into the Staff-and-Line of Tourism Corporation of Gujarat Limited (TCGL) in the present form as well as in the proposed form which is still under Government consideration.

3.3.1 EXISTING ORGANISATION STRUCTURE OF TCGL

The existing organizational structure of TCGL is shown in the following figure 3.1
Figure 3.1

Existing Organizational Structure of TCGL

Source: TCGL document
In the present form, TCGL consists of one Chairman under whom there is one Managing Director. Under the Managing Director, there is a Joint Managing Director/General Manager. There are nine independent departments supervised by nine Managers working under the Joint MD/General Manager. The nine Managers are

i) Finance Manager and Company Secretary under Finance Manager there are three Assistant Managers viz., Asst. Manager – Finance, Asst. Manager – Accounts, and Asst. Manager – Budget.

ii) Manager- Personnel. Under him there are five assistant staff to manage the department.


iv) Manager- Tours and Travel. As the name suggest the department looks after State’s tour and travel related items.

v) Manager-Marketing, IT and Investment. Under him there is one Asst. Manager Marketing, Sr. Administration Assistant and one Administration Assistant.

vi) Manager- Project / Executive Engineer. Under him there is one Asst. Engineer and Draft-Man and Technical and support staff.

vii) Manager- PR and Publicity to looks after personal relation and publicity side.

viii) Dy. Manager-Hotels. TCGL has many hotels under the brand-name of “Toran” and these hotels are supervised by Dy. Manager supported by Unit Managers and Support staff.

ix) Sr. Transport Officer. Under him there is Tourist Officer (TIB- Tourist Information Bureau) and support staff.

Now, after 34 years of its working it is felt that TCGL needs some readjustment so as to make it more viable and competitive in its pursuit in the development of tourism sector. Thus, a proposal to restructure the organization structure of TCGL is with concerned Government Department.
3.3.2 PROPOSED ORGANISATION STRUCTURE OF TCGL

In the proposed form, TCGL will consist of one Chairman under whom there will be one Managing Director. Under the Managing Director, there will be a Joint Managing Director/General Manager. From the Figure 3.2, it is clear that the number of Departments which is nine at present is to be reduced to six in the proposed list. The Department of Company Secretary and Finance manager in the existing TCGL organizational structure is to break up into two separate Departments viz., Company Secretary-cum-Sr. Manager (Corporate Affairs) and Sr. Manager/Manager-Finance and Accounts. Under the first Department i.e. Company Secretary-cum-Sr. Manager, there will be one Dy. Manager (Legal) while under second Department, i.e. Sr. Manager (Finance and Accounts), there will be three independent Departments, managed by three Deputy (Dy.) Managers, viz. (i) Dy. Manager (Finance), (ii) Dy. Manager (Accounts), and (iii) Dy. Manager (Budget). The existing two managerial posts, Manager (Personnel) and Manager (HR) are to be merged into one, designated as Sr. Manager /DGM in proposed list. Under the above proposed Department there will be two independent Managers viz., Manager (HR) and Manager (Personnel). The present post of Manager (Tours and Travel), Dy. Manager (Hotels) and Department of Sr. Tourist officer are to be combined into one under the proposed scheme and will have the nomenclature as Sr. Manager/DGM (Tourism Services). Under the Sr. Manager/DGM there will be (i) Dy. Manager (Hotel) with a subordinate Officer (Tourist), (ii) Sr. Officer (Tours). Under him there will be one Officer (Tourist) with Supporting Staff, and (iii) one Manager (Tourist and Travel). Again the Department under Manager – Marketing, IT and Investment and Department under Manager-PR and Publicity are to be converted into one Department headed by a Sr. Manager /DGM-Marketing. Under this Department, there will be three supporting Departments headed by Manager (IT), Manager (PR) and Dy. Manager (Marketing). Lastly, the existing Department of Manager-Project/Executive Engineer has been proposed to be under Manager-Project. Manager-Project will have under him, Asst. Engineer, Draftsman, and Technical and Support Staff to help him in his work.
Figure 3.2
Proposed Organizational Structure of TCGL

Source: TCGL document
It is felt that by pruning the existing TCGL organization structure of nine departments to six in the proposed scheme is a wise decision. The proposed scheme seems to be more compact and will be more effective for tourism development in the State.

3.4 ORGANISATION AND HUMAN RESOURCE DEVELOPMENT

Tourism and Hospitality sectors are unmethodically linked and leads to the development of the other. Travel and tourism is a complex human activity, leading to consumption of transportation, accommodation, meal, entertainment and other goods and services in numerous fashions. The first World Travel and Tourism summit, held in 1977 at Vilamoura (Portugal), recognized that travel and tourism generates large number of entry level jobs and provides part time or seasonal employment for people seeking flexible working arrangements. Gujarat Government, in particular, till recently failed to recognize Tourism’s economic impact and excluded the industry from the policy and infrastructure investment planning process. In one of confederation of Indian Industry, Ahmedabad study “Tourism in Gujarat – The way ahead 2003”, mentions “The relative inability of Gujarat State to harness and develop its full tourist potential and attract tourists is attributable to a combination of factors like lack of effective policies, inadequate tourist infrastructure, in effective marketing and lack of decent facilities for tourists”.

3.4.1 PROBLEM AND CONSTRAINTS OF HUMAN RESOURCE DEVELOPMENT IN THE STATE

For the State of Gujarat there are a number of problems and constraints which concern the Human Resource Development in the tourism and hospitality sector. Shortage of qualified manpower, shortage of training centers and qualified trainers, lack of strategies and policies for human resource development in the sector are some of the important areas. While professionalism in tourism and hospitality sector worldwide are continue to rise, in Malthusian jargon, in Geometrical Progression, in India in general and Gujarat in particular, the development of Human Resource in Tourism and Hospitality sector is moving at Arithmetical Progression. There is a long-standing myth in India that anyone can work in or manage tourism and hospitality sectors and very little training is required for the same. Thus, the State tourism and hospitality sector is still not recognized as a conceivable profession by the common public and thus hesitate to send their wards to tourism and hospitality institutes. On the contrary
the availability of skilled and trained human power is a crucial element in the successful development and sustainability of a tourist destination. Ultimately it is the skilled and trained human resources that will ensure the delivery of efficient and high quality service to visitors, which is a direct and visible element of a successful tourism product. In fact, high standard of services are particularly important in sustaining long term economic growth. Since success of a tourist destination is determined not only by price competitiveness or by the range of attractions available, but to a large extent by the quality of the services provided. Repeat visits, a vital factor in maintaining tourist flow will be deferred if standards of service do not meet expectations of the tourists. In short, if development of tourism sector is the aim then along with the development of tourism related infrastructures human resource development is mandatory.

In this respect, Gujarat is lagging behind. As tourism sector in the State will witness an increased flow of domestic as well as foreign tourists flow in near future, which in turn will bring an exponential demand for the workforce at managerial, supervisory, skilled and semi-skilled personals at their respective levels. This increase in demand for skilled and semi-skilled human resources will have a direct impact of demand supply mismatch, if present State's labor supply scenario is taken into account. To bridge the widening gap at skill level the State will have to strengthened the tourism and hospitality education needs of the State through the network of vocational stream of school system, tourism and hospitality courses at colleges, universities, ITI's and at polytechnics. In short, a large bulk of human power at managerial and skill level, need to be strengthened and capacities augmented, with international linkages for quality and quantity of human resources.

For untrained staff who are in the job already, in the public or private sector, the employer should through short term training programmes build capacities in order to provide quality service to the tourists. “Train the Trainer” scheme should be implemented State wide for augmenting availability of adequate trainers for training side by side and efforts should be made to project that tourism and hospitality management can be conceivable and lucrative profession.