CHAPTER 6

SUMMARY OF FINDINGS, CONCLUSIONS & RECOMMENDATIONS
SUMMARY OF FINDINGS, CONCLUSIONS & RECOMMENDATIONS

The final chapter of this thesis restates the research problem and reviews the major methods used in this study. It summarizes the findings, puts forward conclusions, admits the limitations, gives recommendations, and discusses the managerial implications and scope for future research.

The study aimed at measuring the travel behaviour of tourists, destination brand image, destination brand loyalty, potential of tourism products and the marketing strategies adopted by the intermediaries such as tour operators and accommodation sector.

Title

Tourism Brand Promotion – An Empirical Study On Kerala

6.1 OBJECTIVES

The following objectives were designed for the study based on key insights and literature review.

1. To assess and compare the Travel Behaviour of both domestic and foreign tourists

2. To analyze and compare the Destination Brand effectiveness of Kerala Tourism among domestic and foreign tourists in terms of Brand Image and Brand Loyalty.

3. To measure and compare the effectiveness of Kerala Tourism Brand Promotion measures and the Tourism Product Usage patterns of both domestic and foreign tourists.
4. To assess the attitude towards and the adequacy of accommodation spots and other infrastructure facilities in Kerala.

5. To analyze the role of tour operators and accommodation providers in the promotion of tourism products in Kerala.

6. To find out interrelationships, if any, between the variables.

6.2 HYPOTHESES

Keeping the objectives in mind, nine hypotheses were developed for the purpose of the study. Some of the important hypotheses are given below.

H1: There is no significant difference between domestic and foreign tourists with regard to the Travel Behaviour measured by Purpose of Visit.

H2: There is no association between Travel Behaviour of domestic and foreign tourists, measured by the Pattern of travelling.

H3: The Destination Brand effectiveness is independent of the category of tourists based on the domicile, measured by the Brand Image Attributes.

H4: The income levels of tourists have significant association with the Tourism Product Usage in terms of Ayurveda and backwater cruise.

6.3 METHODOLOGY

As reported in chapter III, the study adopted a quantitative approach and the type of research is considered as diagnostic research for identifying the problem and descriptive research to achieve the objectives of the study. The research method used to collect data was sample survey method. The required data for the conduct of the study was collected from primary sources. The period of survey was one year commencing...
from October 1st 2005 to September 30th 2006. Stratified random sampling was resorted to as the sampling procedure.

The source of information consists of both domestic and foreign tourists, approved tour operators and accommodation providers. The sample size of tourists was determined as 300, which includes 210 domestic tourists and 90 foreign tourists. Thirty tour operators and a similar number of accommodation providers were selected to constitute the sample. The sample for the study was taken from districts such as Thiruvananthapuram, Kollam, Alappuzha, Kottayam, Idukki, Ernakulam, Kozhikode, Wayanad and Kasargode.

Structured questionnaire was the instrument used for collecting data. Three sets of questionnaires were developed and distributed randomly among tourists, tour operators and property owners. Pilot study was conducted using a judgment sample of 35 domestic tourists, 15 foreign tourists, 5 tour operators and 5 accommodation providers. Questionnaire was subsequently revised based on the results of pilot study to improve the reliability and the level of understanding.

The collected data were edited, coded and then entered into a master chart by the researcher. M S Excel programme was applied for achieving the same. Data was presented in the tabular form and was analyzed with reference to the objectives and hypothesis of the study. The statistical tools applied in the present study are Chi square test, ANOVA and Multi Dimensional Scaling. Statistical programme in Social science (SPSS) has been used for the analysis.
6.4 FINDINGS OF THE STUDY

The findings of the study are summarized below.

1. The number of male tourists visiting Kerala is far more than the female tourists. People below the age of 30 years are showing more interest in travelling to Kerala. Majority of the tourists visiting Kerala belong to small families. Occupation wise analysis reveals that 60 percent of the tourists are professionals whereas only one percent is from the agricultural sector. People with an annual income of Rs.3,50,000/- and above travel more as compared to tourists in lower income brackets.

2. There is statistically significant association between category of tourists and purpose of visit. Sixty three percent of the domestic tourists and 57 percent of the foreign tourists select Kerala mainly for sight seeing. Travel for business constitutes the next important purpose of visit by domestic tourists.

3. Domestic and foreign tourists significantly vary with regard to the pattern of travelling. Seventy six percent of the domestic tourists spend holidays with their families while 48 percent of the foreign tourists are independent travellers. Only a few domestic and foreign tourists prefer to travel in groups.

4. Cultural study is the most preferred holiday activity followed by shopping, trekking, boating and sight seeing. Hill stations are the most preferred tourism product followed by backwater, beaches, health resort and wild life sanctuary.

5. Domestic tourists prefer to stay shorter periods in Kerala when compared to foreign tourists. Fifty six percent of the domestic tourists spent shorter holiday periods of less than one week while 51 percent of the foreign tourists spent up to two weeks in Kerala. The age group of tourists and their duration of stay in Kerala are significantly associated. Tourists below 40 years choose the destination for shorter vacations whereas others opt for longer holidays.
6. Forty seven percent of the domestic tourists and 42 percent of the foreign tourists prefer to stay in four star and three star hotels. Only 3 percent of the total tourists use other non star categories of hotels.

7. Majority of the foreign travellers belong to high spending category and domestic tourists to low spending category. Fifty five percent of the domestic tourists allocated Rs. 25000-50000/- for their trip whereas only 36 percent of the foreign tourists belong to this range. Three percent of the domestic tourists and 27 percent of the foreign tourists spent more than Rs. 100,000/- for the trip to Kerala.

8. Air travel is the most preferred and ship is the least preferred mode of transport for domestic as well as foreign tourists. Seventy four percent of the foreign tourists and 42 percent of the domestic tourists opt for air travel. Only one percent of the total tourists have travelled by ship.

9. The intermediaries such as tour operators and travel agents are playing relatively equal role in booking trips to Kerala. Internet is the next used medium for travel booking. Thirty five percent and 33 percent of the respondents depend on tour operators and travel agents for their bookings. Electronic booking is done by 22 percent of the respondents.

10. Domestic tourists and foreign tourists have different perceptions with regard to brand attribute of Kerala tourism. Sixty two percent of the domestic tourists and 37 percent of the foreign tourists considered serene beauty as the key attribute embodied in the destination image. Medical care and easy conveyance are the least noticed brand attributes by both categories of tourists. The state enjoys a favourable brand image with regard to safety of the destination and behaviour of host people.
11. Statistical association exists between domestic and foreign tourists in their assessment of present trip. Majority of the domestic tourists have viewed their vacation experience as only satisfactory where as a higher percentage of foreign tourists have evaluated their trip as highly satisfactory. There exists high degree of brand loyalty to destination Kerala, resulting in a good number of repeat visitors. Forty eight percent of the tourists are repeat visitors. Ninety eight percent of the domestic tourists and 99 percent of the foreign travellers anticipated to become repeat visitors. Ninety six percent of the domestic tourists and 99 percent of the foreigners were ready to recommend the destination to others.

12. Domestic and international tourists have high awareness level regarding tourism slogan and super brand status. Eighty six percent of the tourists are familiar with the Kerala tourism slogan and 71 percent are aware of the super brand status of Kerala tourism.

13. Twenty seven percent of the tourists derived information about the destination out of their own personal interests and initiative. Friends and relatives with previous experience in Kerala is another inspiring factor in travel decisions of many tourists. Electronic media other than internet is found as the least exploited source for generating information about the travel destination, Kerala. There is no association between male and female tourists with regard to the source of information about Kerala.

14. Kochi is the most visited destination followed by Munnar, Kumarakom, Kovalom and Thekkady. The northern parts of Kerala remain less noticed by majority of the tourists. Kovalom is the most preferred destination in Kerala followed by Kochi, Munnar, Thekkady, Kumarakom, Alleppey, Poovar and Periyar. Wayanad, Bekal and Kappad are the destinations that are least preferred by tourists.
15. Ayurveda is the most popular tourism product among the domestic and international tourists. Ninety four percent of the domestic tourists and 81 percent of the foreign tourists are aware that Kerala is well known for ayurvedic treatment. Art forms of Kerala are the least popular tourism product among domestic travellers whereas medical tourism is the least popular among international travellers. Study also proves that Kerala is emerging as an important destination for MICE.

16. Hill station is the most used tourism product and ayurveda is the least exploited tourism product in Kerala. Seventy seven percent of the respondents have visited the hill stations whereas only 42 percent of the respondents have experienced the ayurvedic treatments in Kerala. The income levels of tourists have no significant association with the tourism product usage in terms of ayurveda. Likewise there is no significant association between income and preference for backwater cruise.

17. Kovalom is the most popular beach in Kerala. Of the total tourists, 64 percent visited Kovalom beach and only 12 percent visited Varkala beach. Other beaches such as Kappad, Bekal and Cherai are visited by less than 10 percent of the tourists. Munnar is the most preferred and Periyar is the least preferred hill station by the tourists. Seventy one percent of the tourists visited Munnar whereas only 6 percent of the tourists visited Periyar.

18. Majority of the tourists have positive image about backwater cruise when compared to ayurveda and medical tourism. Seventy percent of the respondents have very good opinion about backwater cruise in Kerala. Expensive treatment and unqualified manpower are the two major factors which limit the growth of ayurveda in Kerala. Sixty percent of the tourists have considered the cost of medical treatment as moderate.
19. Tourists and tour operators consider backwaters as the most potential tourism product in Kerala. Accommodation providers highlight both ayurveda and backwaters as the potential tourism products. The sex and category of tourists - domestic and foreign - have no influence in perceiving the tourism products as most potential.

20. Among the four attributes such as accommodation, staff behaviour, food and communication facilities in properties, behaviour of staff in hotels is rated high and communication facilities are rated very low. Fifty six percent of the tourists rated behaviour of staff in hotels as excellent and 36 percent of the respondents considered it as good. Twenty six percent of the respondents believed that the behaviour of staff in hotels is excellent and 51 percent as good.

21. As regards infrastructure facilities, tourists accorded high rating to the transportation facilities and low rating to traffic and maintenance of roads. Seventy four percent of the tourists have good opinion about transportation facilities in Kerala. Only 23 percent of the tourists believed that the condition of roads in Kerala is good. More than 50 percent of the tourists considered the behaviour of taxi drivers and tourist guide services as good. Among the tour operators, seventy six percent have good opinion about the accommodation facilities provided in hotels. But majority of them mentioned about the quality of roads in Kerala as poor. Other limiting factors which may hinder the tourism growth in the state of Kerala are unhygienic conditions, lack of tourists information and anti social activities.

22. Thirty seven percent of the tour operators have offices outside the state and 25 percent have offices abroad too. Fifty nine percent of the tour operators consider Kerala as a destination for shorter holidays. Among the various promotional tools highest priority was given to brochures and a fairly high priority was accorded
to website information. Eighty percent and 77 percent of the tour operators use brochures and web site respectively. The least priority among the promotion strategies was given to the promotion through agents in other countries, and direct contact through foreign agencies.

23. Fifty eight percent of the tour operators market Kerala as a stand alone package. Kumarakom is the most promoted destination by tour operators followed by Munnar, Thekkady, Kovalom, Kochi. Destinations in the northern parts of Kerala are the least promoted destinations. Fifty percent of the tour operators provide both tailor made and package tours to the tourists. Tour operators prefer middle income and high income group as their customers.

24. Kochi and Wayanad are the destinations which do not face any shortage of rooms. The major tourist destinations such as Munnar, Thekkady, Kumarakom and Kovalom have shortage of accommodation facilities during peak season.

25. Majority of the accommodation providers argued that the average stay of the guests in the property is 2-3 days. UK is the most potential International market for Kerala tourism followed by France and Germany. Participation in fairs is the most used marketing medium by accommodation providers followed by brochures and advertisements. Eighty percent of the accommodation providers participate in different fairs and 73 percent uses brochures for the promotion of their products. Only 33 percent of the unit used web site as their medium of publicity.

26. Direct enquiry is one of the main sources of advance reservations at hotels in Kerala followed by tour operators and travel agents. Thirty seven percent of the respondents get reservations mainly through direct enquiry whereas 33 percent of the respondents used out tour operators and travel agents as the main source of advance booking.
27. Majority of the accommodation units make arrangements for backwater cruise and art forms in order to meet the request of their guests. Eighty seven percent of the facilitators have their own conference halls with various capacities. Seventy two percent of the properties are offering ayurvedic packages for their customers. Only 24 percent of the properties have a bar attached to the property. Accommodation providers are of the opinion that it is required for customer satisfaction and more revenue generation.

28. Eighty five percent of the accommodation providers have designed tagline attached to the name of the property for easy marketing. Ninety five percent of them feel that these taglines enhance awareness about the destination and build a beneficial brand image.

29. Eighty nine percent of the accommodation providers and 81 percent of the tour operators opined that there is proper coordination between Department of Tourism and private sector in Kerala. But majority of them are not getting any incentives and adequate promotional materials from the government.

6.5 CONCLUSIONS

On the basis of the above findings of the study on ‘Kerala tourism brand promotion’ following important conclusions are made.

1. The results of this empirical study on Kerala tourism brand promotion leads to the conclusion that Kerala tourism brand promotion measures are effective in positioning Kerala as a powerful tourism destination brand. This has been justified very well by the results of tourism brand image, tourism brand loyalty, tourism brand awareness and various tourism product attributes.
2. The brand promotion measures adopted by government and private entrepreneurs helped to transform the state into a powerful tourism destination brand. Tourists viewed Kerala as a destination with nature based attractions. This image may be developed due to the positioning of the state as a destination blessed by nature through the campaign ‘God’s Own Country’. Kerala is considered as a safe destination with well behaved hosts. The destination brand has the potential to evoke an emotional attachment among tourists. The positive brand image and brand loyalty towards Kerala tourism is influential in bringing more tourists to the destination.

3. Tour operators and accommodation providers are playing a key role in the overall promotion of tourism especially in the destination brand building of Kerala Tourism. They focus on upmarket high spending tourists in order to transform the state into a sustainable tourism industry. Department of Tourism has succeeded to attain confidence of these private sectors. Government should continue to promote them by way of supplying promotional materials, incentives, subsidies and creating a friendly environment for their smooth functioning in the state.

4. Kerala obviously possesses significant potential including enchanting backwaters, houseboats, rolling hills, serene beaches, ayurvedic health centres and traditional art forms for the development of tourism industry. Among the various tourism products, Ayurveda is the most popular tourism product in the domestic and international travel market. But the excessive cost of ayurvedic treatment and unqualified manpower in this sector limits its growth. Hill station is identified as the most used tourism product. Tourists, tour operators and accommodation providers have considered backwater as the most potential tourism product that can be highlighted in the world tourism map.
5. There is regional disparity in tourism development in Kerala. The major destinations promoted by tour operators are situated in the southern and central parts of Kerala. The northern parts of Kerala such as Wayanad, Bekal and Kappad remain less noticed by majority of the tourists.

6. The study provides awareness about national and international trends in travel behaviour. Tourists travel with different intentions to the destinations. The major purpose of visit is sight seeing. Cultural background of tourists is reflected in their pattern of travelling. The promotional measures of Kerala tourism are not fully successful in attracting more groups to the state. Foreign tourists spend more time and money in Kerala for their holidays and this leads to more revenue generation. Travel budget allocated by the tourists for their trip to Kerala supports the fact that Kerala is becoming an upmarket high spending tourist. Cultural studies topped the list of favourite holiday activity and this provides great scope for Kerala which is immensely rich in its unique art forms, culture and heritage.

7. Kerala tourism is not free from weaknesses. Anti social activities, unhygienic conditions and lack of tourists information centres are the critical limiting factors which may hinder the growth of Kerala tourism. Efforts should be made to improve the infrastructure facilities which are essential for brand maintenance and quality experience for the visitors to Kerala.
6.6 RECOMMENDATIONS

1. Product diversification should be the main area of focus in tourism marketing. Destination marketers should give some more emphasis on projecting Kerala as a destination with a choice of Backwater, Hill Stations, Beaches, Ayurveda, Culture and Heritage as well as an ideal venue for Meetings, Incentives, Conferences and Exhibitions. Efforts should also be taken to concentrate more on the untapped and unexplored potential of tourism sectors like religious tourism and medical tourism. The major pilgrimage centres of Kerala must be developed and given publicity in order to promote pilgrim tourism.

2. Promotional activities must be designed to enhance the awareness level of destinations in Northern parts of Kerala such as Kappad, Bekal and Wayanad. Tour operators may design package tours which include tourism products of these destinations. This will help to divert tourist traffic to lesser-known destinations. Kozhikode can be served as an entry point for the tourists.

3. Kerala is getting lots of business travellers and it is believed that today’s satisfied business travellers are tomorrow’s leisure travellers. A planned strategy has to be formulated by the Dept. of Tourism and accommodation providers to convert these business travellers into prospective holiday travellers.

4. Efforts should be made to extend the average duration of stay of tourists to one week which will result in increased revenue generation, product exploitation, destination development and employment generation.

5. While promoting various tourism products cultural tourism must be accorded top priority because most of the respondents showed their interest for culture and tradition of the destination. Major historical monuments should be given a face-lift. Since shopping is also a favourable holiday activity of tourists, necessary steps have to be taken to offer a hassle free shopping experience to the visiting people.
6. By considering tourist’s inclination towards air travel, adequate facilities in the airports have to be provided. Air connectivity to various tourism destinations will help to save time and to attract more high income group tourists.

7. It is essential to build awareness among Keralites about the natural and cultural riches of the land and the importance of preserving them for a better future. Protection and conservation of the resources is essential for the survival and suitable growth of tourism industry in the long term.

8. The brand loyalty of tourists towards Kerala has to be sustained by way of creating an emotional bond with them. This will encourage them to act as brand ambassadors of the destination which will result in more tourists inflow through them.

9. Opportunities through internet have to be utilized more in the promotion of tourism marketing. Conscious efforts have to be taken by the government and private players in creating attractive and innovative web sites and linking it with leading portals.

10. Properties in each destination must offer more entertainment avenues such as cultural shows, backwater cruise, trekking etc so that the duration of stay can be increased, which in turn contributes more revenue to them. By way of arranging more facilities like shopping, trekking, village visiting, ayurvedic facilities etc at various destinations we can arrange longer holidays, which will cause to attract quality tourists to the state.

11. It is extremely important to develop infrastructure and other facilities in order to transform the state into a long haul tourist destination. The government should take the initiative and improve tourism facilities for the traveller. A good network of well-maintained roads is necessary to ensure maximum connectivity to the rest of the country. Dept. of tourism should set up more tourist information centres in each
destination within Kerala. The tourism department should also conduct training programmes for taxi drivers and tourist guides.

12. The state has to provide more number of properties in destinations such as Munnar, Kumarakom, Thekkady, Kovalom, Kappad and Bekal. Government incentives may facilitate the establishment of more hotels and resorts in hill stations, pilgrim centers and special tourism destinations.

13. The authorities should realize that the mushrooming of unlicensed and ill-equipped ayurvedic centres with untrained and unqualified personnel would damage Kerala’s tourism image.

14. To tide over the lean season, Kerala should aggressively market monsoon packages in national and international markets. The state should offer honeymoon packages, ayurveda, backwater cruise and various other activities to keep the guests engaged. The infrastructure would have to be adequate, good roads and adequate accommodation facilities are necessary to promote monsoon tourism.

15. Tourism products such as ayurveda and backwaters are mostly used by higher income groups. For better product usage tourism sector has to concentrate more on upmarket high spending tourists.

16. For better brand promotion, Government has to prepare sufficient and innovative promotional materials and it has to be supplied to tourists, tour operators and accommodation providers.
6.7 MANAGERIAL IMPLICATIONS OF THE STUDY

The practice of marketing and branding tourist destinations is becoming a widely recognized practice among tourism marketing organizations. The findings of this research have strong implications on private, public and governmental sectors that manage the tourism operations in order to maximize the foreign earnings. The study provides useful basic data that can guide research students and supervise academics interested in tourism destination marketing.

The study examined the travel behaviour of the tourists, which provides pragmatic guide to the destination marketers. The destination image attributes identified in this study are vital for the successful implementation of positioning strategies. However creating awareness of the state’s tourism attractions can provide major opportunities for the state in generating increased travel in future.

This study will be of great interest to tourism practitioners and research scholars with a strong interest in the marketing of tourism destinations. The study clearly suggests that tour operators in Kerala are narrowly positioning Kerala as a backwater destination with a relatively geographic emphasis on the central zone of the state. It is true that backwater is the Unique Selling Proposition of Kerala tourism. However, the analysis of tourist’s responses reveals the potentiality of other factors in attracting them to the destination. The researcher firmly believes that development and diversification of tourism product is very relevant for the successful destination brand promotion strategy. Tour operators can also focus on marketing lesser-known destinations, which are enriched with natural beauty.

The study also points out the major drawbacks of Kerala tourism. Such information is vital for rectifying the problem areas.
6.8 FUTURE RESEARCH

The study is conducted by gathering information from different areas including tourist, tour operator, hotels and resorts. Since the focus of this paper is limited to brand promotion of Kerala tourism, further studies might focus on other aspects.

The study has considered only some image attributes. Therefore empirical research on other brand image attributes is encouraged so that the results obtained in this study can be generalized further.

Further research will assist in determining the best element in the promotion mix that can effectively communicate the brand essence and brand promise of destination Kerala.

Another avenue for future research include the role of tour operators and properties in developing a strategy for long-term sustainability of the destination.

A more rigorous and comparative study is needed to know how prospective customers view Kerala as compared to that of competitors.

More research would seem worthwhile in order to broaden understanding of the behavioural pattern of the tourists.